FACTSHEET - GLOBAL CLINICAL TRIAL LANDSCAPE

DATA AS OF 20 November 2025

Drug Pipeline & Approval Trends in China vs US

Active First in Class Pipeline Drugs Year-on-Year Comparison

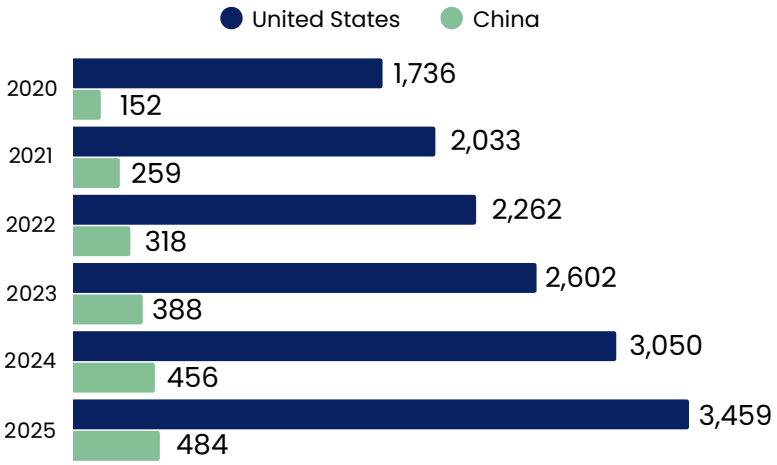
26%
China FIC CAGR
vs 15% US (2020-2025)

21%
China NME CAGR
vs 9% US (2020-2025)

1.7x
Faster Growth
China FIC pipeline vs US

12%
China FIC Share
Up from 8% in 2020

ACTIVE FIRST-IN-CLASS (FIC) PIPELINE TOTAL



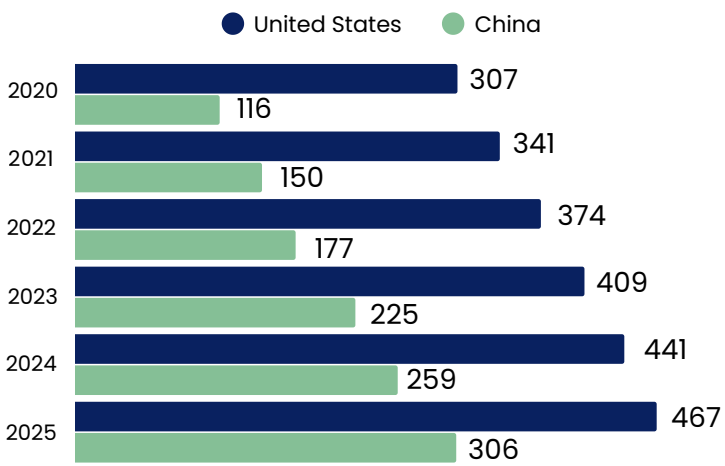
26%
Growth Trajectory (CAGR)
CHINA

15%
Growth Trajectory (CAGR)
UNITED STATES

Methodology
First-in-Class [i] status for China pipeline drugs is derived by applying the US FIC classification logic to drugs of Chinese origin. Counts based on highest development stage as of 31 Dec each year (20 Nov for 2025).

Key Takeaways
China's FIC pipeline experienced higher growth compared to the US from 2020-2025, **with 3.2x and 2.0x growth reported**, respectively.
China's share of first-in-class drugs rose from 8% to 12% and could reach 15–18% by 2027 at current rates

APPROVED NME/NBE DRUGS TOTAL



21%
Growth Trajectory (CAGR)
CHINA

9%
Growth Trajectory (CAGR)
UNITED STATES

Methodology
Only marketed drugs included (NME/NBE [ii] tagging available for marketed drugs only). Counts based on highest development stage as of 31 Dec each year (20 Nov for 2025).

Key Takeaways
China's NME **approvals grew 2.6x from 116 (2020) to 306 (2025)**, compared to the US 1.5x growth.
The 21% vs 9% CAGR differential suggests China's regulatory and commercial maturity is accelerating

i. First-in-Class (FIC) - Innovative drugs whose candidates contain active ingredients not previously approved by the U.S. Food and Drug Administration and are originated or sponsored by a Chinese company.

Acronyms
ii. NME - New Molecular Entity
iii. New Biological Entity

STRATEGIC OUTLOOK

At current trajectories, China could represent 15-18% of global first-in-class drugs pipeline by 2027

2027
PROJECTION

For more information: https://www.globaldata.com/health-economics/pharmatrends/

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