

Evolution of the Immune Checkpoint Inhibitor Market Landscape in China



Recent regulatory developments and increasing domestic competition in China are now shaping development strategy for global companies

Historically, pharmaceutical development efforts have focused on countries likely to generate high product revenue; typically the G7 (US, EU5, Japan). Owing to continued economic growth, streamlining of regulatory processes, and large treatable populations, China has become a particular focus of intensifying interest for global pharma companies. Although China is an extremely lucrative market, developers must appreciate unique epidemiology and treatment dynamics and a regulatory and competitive environment that differ from G7 markets

Growth in ICI Trials

Despite competitive and regulatory headwinds, tremendous market potential still exists for ICI developers looking to commercialize their product(s) in China, evidenced by the continued growth in industry-sponsored trials that include Chinese sites

Relative incidence of most common tumors

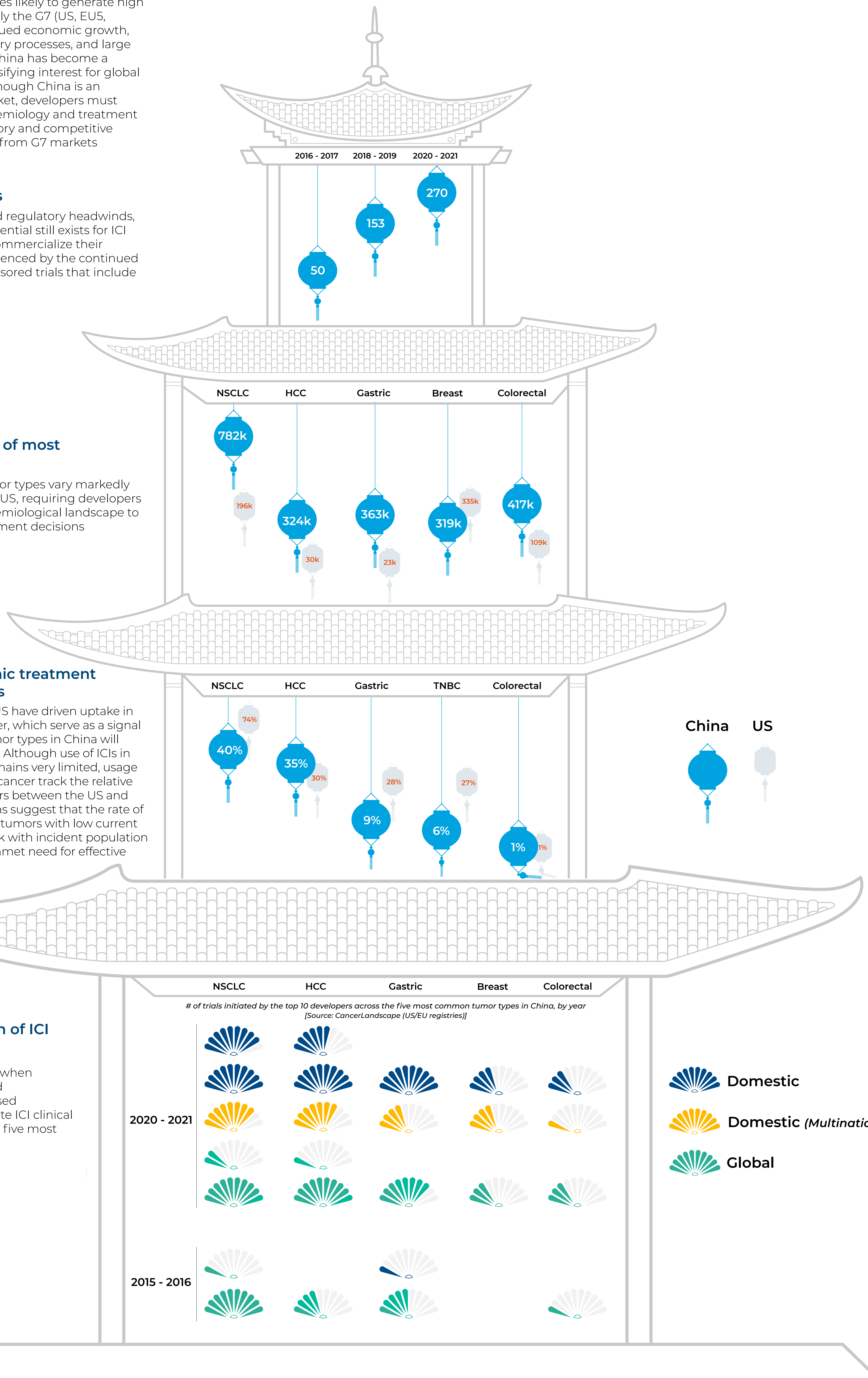
The most common tumor types vary markedly between China and the US, requiring developers to understand the epidemiological landscape to make strategic development decisions

ICI share of systemic treatment across tumor types

Earlier approvals in the US have driven uptake in NSCLC and gastric cancer, which serve as a signal that uptake in these tumor types in China will continue at a rapid pace. Although use of ICIs in colorectal carcinoma remains very limited, usage rates in HCC and breast cancer track the relative incidence of those tumors between the US and China. These observations suggest that the rate of continuing ICI uptake in tumors with low current ICI penetration may track with incident population sizes and a continued unmet need for effective therapies

China's domination of ICI clinical trials

In contrast to 2015-2016, when G7-based companies led development, China-based companies now dominate ICI clinical trials in China across the five most common tumors



These figures were generated using data from CancerMPact® (Patient Metrics, Treatment Architecture, Future Trends & Insights, and CancerLandscape)

Relative to the G7, China has very different market access and oncology treatment landscapes that are both quickly evolving; therefore, it is critical to closely monitor competitor activities with data-driven insights to inform strategic decisions in this rapidly growing market. To bring remarkable clarity to your strategic decision making, contact us at info@cernerenviza.com

About Cerner Enviza™

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