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, EU, Japan). Giving to continued economic growth, streamlining of regulatory processes, and large treatable populations, China has become a particular focus of 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.

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.

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