U.S. continues to lead new drug R&D, but Asia-Pacific is starting to rise

Oncology drugs dominate development, driven by strong demand for treatments

- Strong economic conditions globally during 2013-17 helped spur new product development.
- Oncology accounted for 34% of the global industry pipeline in 2017, up from 28% in 2010, but had a relatively low success rate from Phase III to regulatory filing (40% vs. 58% for all drugs).
- Oncology, diabetes, and orphan drugs comprised 37% to 54% of new product launches worldwide during 2013-17.
- The U.S. share of first launches worldwide remains dominant at 60%-65% during 2013-17, having increased steadily from a low of 45% in 2010.
- While drug development occurs globally, a regional focus on specific therapeutic areas has emerged.
- China, India, and South Korea are emerging as important players on the global R&D stage.