New Research Finds China's Share of First-Launched Medicines Surging, as Europe Lags and the U.S.' Lead Weakens

The analysis, the first to examine two decades of global change in biopharmaceutical markets, shows shifts in the innovation landscape.

WASHINGTON, DC, UNITED STATES, September 15, 2026 /EINPresswire.com/ -- New research from the National Pharmaceutical Council (NPC) finds that China demonstrated growth in the share of first-launched medicines over the past two decades while Europe experienced a decline. The United States remains the global leader, but its lead has narrowed since the early 2000s.

The Changing Landscape of Global Biopharmaceutical Leadership appeared in the peer-reviewed journal Therapeutic Innovation & Regulatory Science. It is the first study to track the global shift in first-launched medicines over the past two decades, and to describe the characteristics of the medicines driving it.

NPC used Citeline's PharmaProjects database to identify where small-molecule and biologic drugs launched first and the home countries of the companies that developed them from 2004 through 2024. A first launch is the first country where a medicine becomes commercially available.

The findings:

Europe's role declined. Europe's share of first launches fell more than half, from 26.7% in 2004 to 8.5% in 2024.
- The share of first launches from European companies declined from 26.7% in 2004 to 20.7% in 2024.

China's role rose. Its share of first launches grew from 3.3% in 2004 to 28.7% in 2024, with rapid growth in oncology medicines (8.3% to 56.1%).
-The share of first launches from China-headquartered companies increased from 1.7% in 2004 to 26.2% in 2024.

While the U.S. remains the global leader, its lead is narrowing. The U.S. accounted for the largest share of first launches over the full period (43.1%), but its share declined from 45.9% in 2004 to 37.8% in 2024.

- The share of first launches from U.S.-headquartered companies declined from 38.3% in 2004 to 31.7% in 2024.

The study is descriptive and does not identify why these shifts happened. Its authors note that biopharmaceutical leadership includes additional measures outside of the scope of this study. U.S. biopharmaceutical leadership in medical innovation is not a given. Prior reviews by the Government Accountability Office, the European Commission, and independent researchers have linked Europe's decline in part to its pricing and reimbursement policies.

This peer-reviewed research expands on NPC's February 2026 fact sheet, U.S. Biopharmaceutical Leadership Amidst Changing Price Regulation.

About the National Pharmaceutical Council

NPC serves patients and society with policy-relevant research on the value of patient access to innovative medicines and the importance of scientific advancement. We envision a world where advances in medicine are accessible to patients, valued by society, and sustainably reimbursed by payers to ensure continued innovation. For more information, visit npcnow.org and follow NPC on LinkedIn.

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