

Content highlights

Publication date
July 2025

Geography
China

Primary research
Qualitative and quantitative insights driven by 5 thought-leader interviews and surveys with 75 medical oncologists in China

Epidemiology
Diagnosed incidence of NSCLC in urban versus rural China; clinically relevant and commercially relevant drug-treatable populations

Forecast
10-year, annualized, drug-level sales and patient share of key NSCLC therapies through 2034, based on primary and secondary market research to formulate bottom-up assumptions

Drug treatments
Coverage of key current and late-phase emerging therapies

Custom drug modeler
Integrated tool to input customized forecast assumptions (e.g., launch date, price)

Non-Small-Cell Lung Cancer

China In-Depth

Non-small-cell lung cancer (NSCLC) is the leading cause of cancer-related mortality in China. Treatment is based on biomarker status; patients with EGFR- and ALK-positive tumors generally receive tyrosine kinase inhibitors (TKIs); for patients without actionable biomarkers, immune checkpoint inhibitors have become the standard of care. More-efficacious therapies are needed, especially for patients who progress after immune checkpoint inhibitor treatment. The late-phase pipeline of NSCLC therapies in China is diverse. In this report, we provide a comprehensive analysis of NSCLC patient populations, current disease management, unmet needs, and the potential of current and emerging therapies. Understanding the impact of clinical and nonclinical factors—price dynamics, inclusion in China’s National Reimbursement Drug List (NRDL)—will be key to the success of current and future players in this highly lucrative market.

Questions answered

- What is the diagnosed incidence of NSCLC in China, and how are patients with NSCLC treated today? Do treatment management strategies differ between urban and rural China?
- What are interviewed experts’ insights into current treatment options?
- What are the key unmet needs in the management of NSCLC?
- What are the key market access considerations, and how will they impact the uptake of emerging therapies in this market?
- What are the key drivers and constraints in this market, and how will the market evolve over the forecast period?

Product description

China In-Depth offers comprehensive market intelligence with world-class epidemiology, insight into the China-specific market access landscape, current and emerging therapies, and drug forecasts supported by detailed primary and secondary research, enabling you to:

- Optimize your long-term disease and development strategy in China.
- Quantify market potential for your pipeline assets and those of your competitors.
- Understand current treatment paradigms, the complex access and reimbursement environment, and the current and future therapeutic landscape.
- Gauge the commercial outlook and impact of key market events.

Learn more about Clarivate’s full suite of NSCLC solutions:

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