



Pharma R&D

Annual Review 2024 Supplement: New Active Substances Infographic

Insights from our
supplemental report on
new active substances
launched in 2023

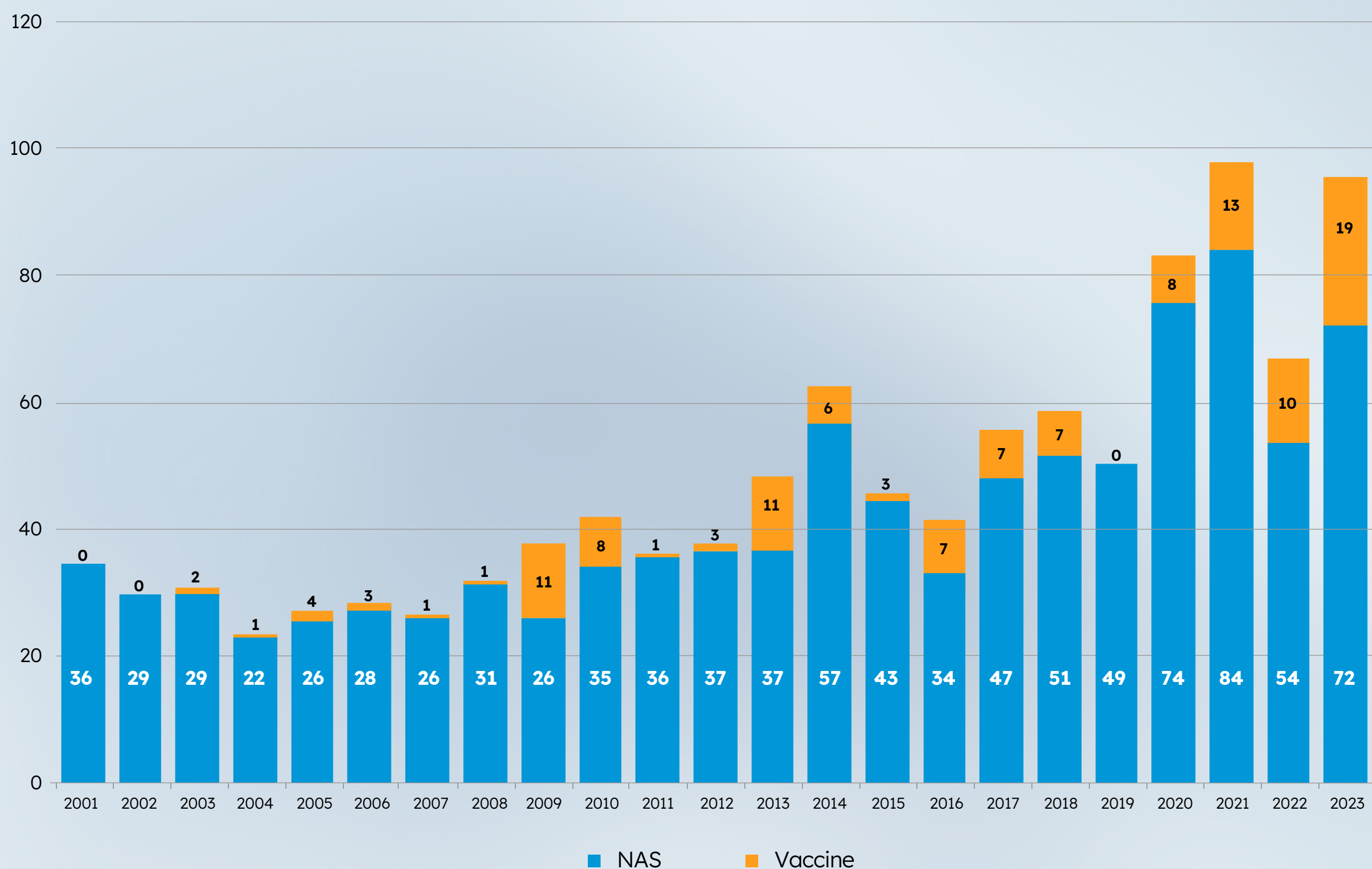


Key Findings

Last year was pharma's second-hottest ever in terms of new active substances (NASs) introduced. While the forecast for NAS launches is generally fair, there are a few clouds on the horizon in terms of a high Phase II failure rate and a relatively small number of first-in-class drugs among the NASs launched in 2023.

Number of NAS launches by year

A total of 91 new active substances (NASs) across 90 products entered the market during 2023 (one was a fixed-dose combination containing two NASs). This exceeded 2022's total by 17 and fell only six short of 2021's record haul. However, only 15.4% of the NASs launched in 2023 can be classified as first in class, compared with 26.7% of those launched in 2022.



Top company NAS launch performance

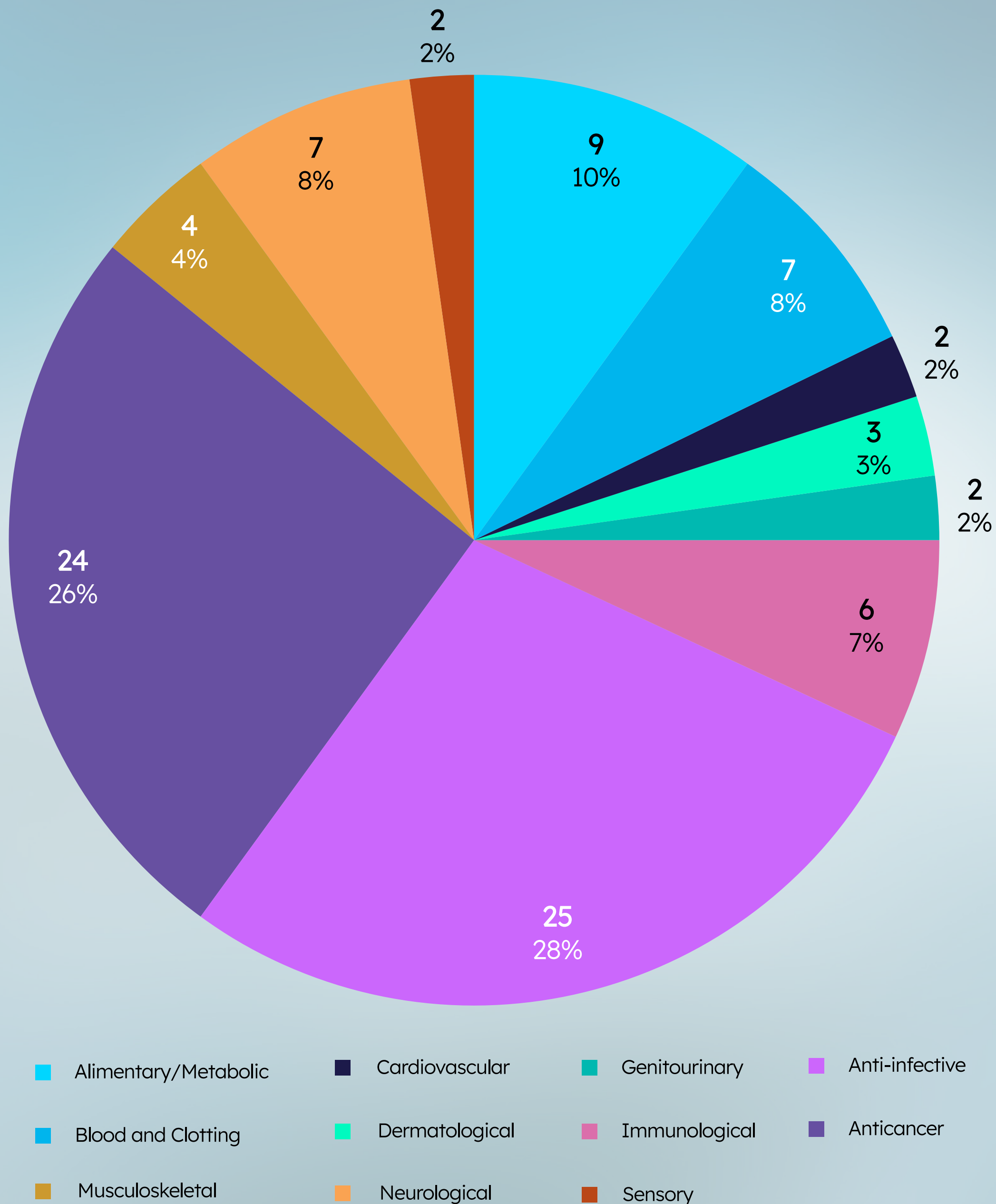
The sun shone brightest for Pfizer in terms of NAS launches, with six making it onto the market in 2023. Biogen’s four NAS launches put it in second place. But the real surprise was the Chinese company SinoCellTech, which had the best launch-to-pipeline size ratio with three NAS debuts.

Of the top 10 companies in terms of pipeline size, only Merck & Co. launched zero NASs in 2023.

Company	Number of NASs	Position in pipeline chart
Pfizer	6	2
Biogen	4	40
SinoCellTech	3	218
Eli Lilly	3	4
Betta Pharmaceuticals	2	81
SK	2	41
Innovent Biologics	2	32
CSPC Pharmaceutical	2	24
Astellas	2	22
Eisai	2	20
GlaxoSmithKline	2	11
Sanofi	2	10
Jiangsu Hengrui	2	8
Novartis	2	6
AstraZeneca	2	3
Roche	2	1
Johnson & Johnson	1	7
Bristol Myers Squibb	1	5
Merck & Co.	0	9

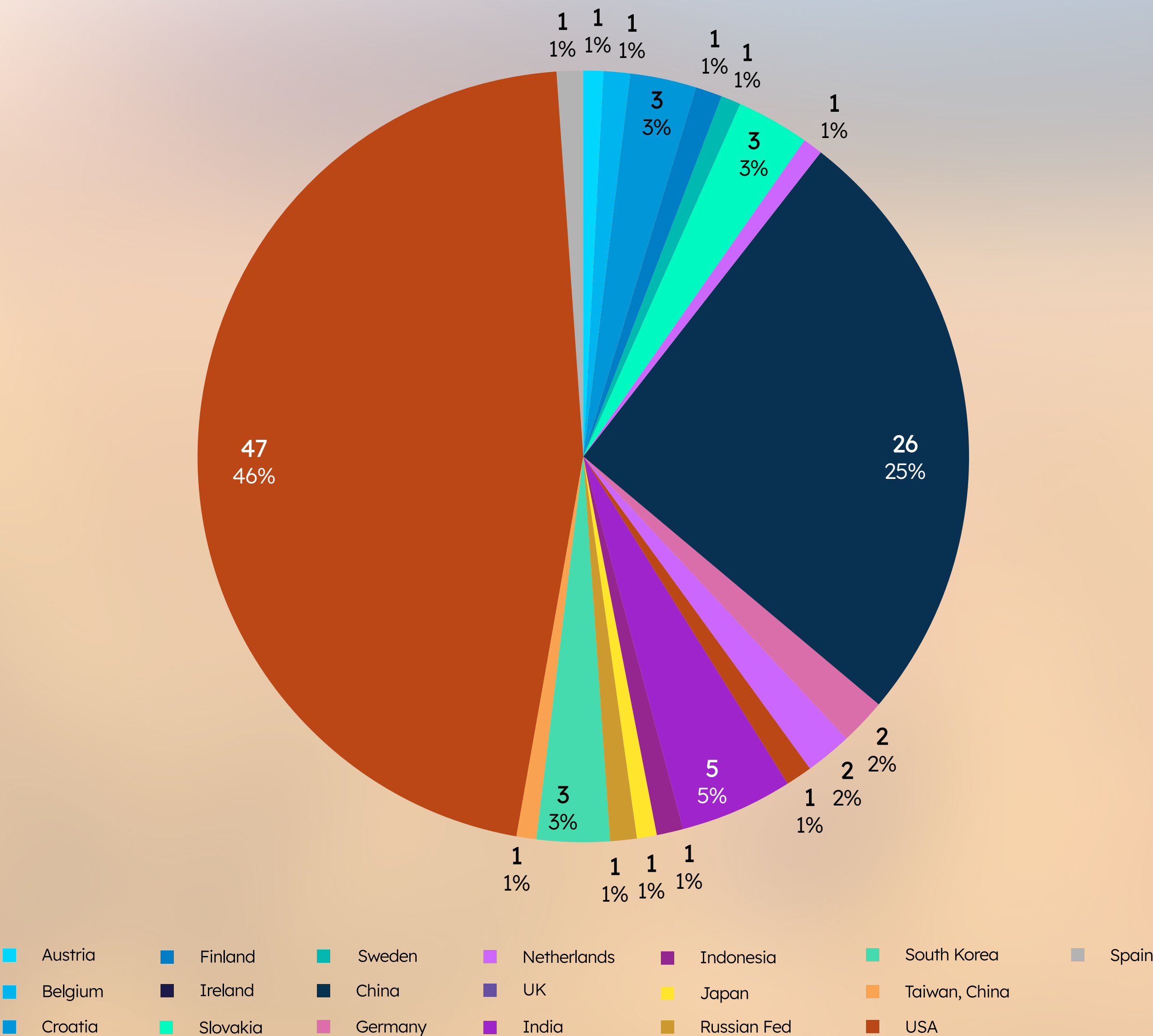
NAS launches by therapeutic group

Anti-infectives accounted for the largest share (27.5%) of 2023's NAS releases, though 19 of the 25 NASs were vaccines. Anticancer drugs came in a close second, with a 26.3% share of NAS launches. With 40.1% of the overall pipeline devoted to oncology, this tepid result suggests the therapeutic area remains a high risk for R&D.



NAS launches by country/region

The US remains on top in terms of NAS introductions, with 46.5% of 2023 NAS debuts taking place there, a significant increase from 2022's 32% share. But China is coming on strong, posting 25% of NAS first launches in 2023, up from 21.6% the year before.



Note: some drugs that might have been simultaneously launched in more than one market will have been counted more than once.

Source: Pharmaprojects®, March 2024