China's Pharmaceutical Industry "15th Five-Year" Development Plan

China – Ministry of Industry and Information Technology (MIIT) and nine other departments

Main information

Scope of Application:

All pharmaceutical industry enterprises across China (innovative drugs, generics, biologicals, traditional medicines, medical devices and precision diagnostics). The Plan is an indicative, forward-looking roadmap: its 2030 targets are "expected" rather than mandatory, and implementation is coordinated across industrial, science and technology, regulatory, medical, medical-insurance, financial and talent policies.

Effective Date:

18 September 2026

Related Provisions:

- Builds on the "14th Five-Year" Pharmaceutical Industry Development Plan, its predecessor.
- Implements the 2026 Government Work Report call to accelerate biopharmaceuticals into a national emerging pillar industry.

Pharm.east.

Key Topics

Framework

- By 2030, biopharmaceutical R&D and application will firmly rank among the world's leading countries, key core technologies achieve systematic breakthroughs, and biopharmaceuticals accelerate into a national emerging pillar industry.
- Eight strategic directions and 25 key tasks: innovation, secure supply, digital-green care, accessibility, value and international cooperation.

What's new

- First-in-class ambition: FIC drugs targeted at 25% or more of the global share and five or more drugs above USD 1 billion in annual global sales – a shift from scale-driven to innovation-driven competition.
- Stronger innovation inputs: listed companies' R&D intensity at 10% or more a year, innovative-drug pipelines and approvals ranking among the world's leading countries, and 200 or more innovative medical devices approved over five years.

Sensitive Factors

- Development vs security: the Plan balances "development and security", calling to strengthen industrial-chain resilience, biosecurity, pandemic preparedness and emergency supply.
- Pricing, reimbursement and accessibility: improving price, payment and usage policies and raising drug accessibility – reimbursement, basic-drug supply and affordability remain sensitive.

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Drivers

- **Innovation reorientation:** with first-in-class drugs targeted at 25% or more of the global share and R&D intensity at 10% or more a year, companies persisting with 'me-too' products risk losing funding, approvals and market share – investing in first-in-class and best-in-class pipelines becomes a competitive necessity.
- **Digital and frontier-tech baseline:** AI, computational medicine, precision diagnosis and therapy, and advanced production modes are set to become the competitive baseline, so companies should adopt AI-enabled R&D, digital transformation and precision-medicine capabilities early.
- **Global integration and resilient supply chains:** the Plan pushes deep embedding into the global innovation network while strengthening domestic chain resilience and security; companies need both global clinical, registration and commercialisation capabilities and localised, secure supply chains to capture export opportunity and compliance advantage.

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