

Content highlights

Publication date
December 2025

Geography
China

Primary research
Qualitative and quantitative insights driven by 5 thought-leader interviews and surveys with 50 gastroenterologists in China

Epidemiology
Diagnosed prevalence of ulcerative colitis in urban versus rural China, clinically relevant and market-relevant drug-treatable populations

Forecast
10-year, annualized, drug-level sales and patient share of key ulcerative colitis 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)

Ulcerative Colitis

China In-Depth

Ulcerative colitis (UC) is a chronic, progressive inflammatory bowel disease marked by inflammation and ulceration of the colon and rectum. The primary objective of UC pharmacotherapy is to induce and maintain remission; drug selection is tailored to symptom severity. While conventional therapies (e.g., aminosalicylates, corticosteroids) will continue to dominate treatment, there is growing interest in non-TNF-alpha targeted therapies. These innovative agents are expected to drive competition and offer hope to patients unresponsive to existing treatments. The UC therapy market in China will experience considerable growth over the next decade, fueled by the anticipated launch and adoption of several targeted therapies, including Johnson & Johnson Innovative Medicine's Tremfya, AbbVie's Skyrizi, Eli Lilly's Omvoh, BMS's Zeposia, Pfizer's Velsipity, and Hengrui's ivarmacitinib. In this report, we evaluate how clinical and nonclinical factors—such as pricing dynamics and inclusion in China's National Reimbursement Drug List—will influence the treatment paradigm during the forecast period. Understanding these converging factors is crucial for the key players in this market.

Questions answered

- What is the size of China's diagnosed UC population, and how will drug-treatment rates change over the forecast period?
- What are interviewed experts' insights into current treatment options?
- What are the key unmet needs in the management of UC in China?
- What are the key market access considerations for branded therapies in the UC pipeline in China? What sales / uptake could they secure?
- What are the key drivers of and constraints in China's UC therapy 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 ulcerative colitis solutions:

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