

Research Report on China's Mesalazine Market, 2021-2025

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Abstracts

Inflammatory bowel disease (IBD) is a chronic disease of the digestive system with unclear etiology, difficulty to cure, and recurrent attacks with multiple complications. The incidence of IBD in China has increased significantly in recent years, with an estimated 1 million new cases by 2020, and the incidence population is young. The disease seriously affects patients' work productivity and daily life, and the fear of recurrent IBD attacks and the shame of frequent toileting not only impose a physical burden on them, but also greatly affect their emotions and social relationships, making them prone to negative emotions such as anxiety and depression.

There is no complete cure for IBD. The goal of treatment now is primarily to reduce the inflammation that triggers the disease, thereby providing short or long-term relief and reducing the risk of complications. Treatments for IBD usually includes medication and surgery. Medications used for IBD are anti-inflammatory drugs, immunosuppressants, biologics, and antibiotics.

The use of anti-inflammatory drugs is usually the first step in the treatment of IBD. Corticosteroids and amino salicylates (5-ASA) are included in anti-inflammatory drugs, namely Allergan's Mesalazine, Salix Pharma's Baisaiazide and Budesonide, and AstraZeneca's Entocort EC.

Mesalazine, also known as 5-aminosalicylic acid (5-ASA), is an amino salicylic acid anti-inflammatory drug that was originally developed by Ferring and officially launched in the United States in 1985.

Mesalazine can inhibit the synthesis of prostaglandins that cause inflammation and the formation of the inflammatory mediator leukotrienes, thus acting as a significant inhibitor

of the inflammation of the intestinal mucosa, especially the connective tissue of the intestinal wall with inflammation. It has good efficacy in ulcerative colitis, ulcerative enteritis and Crohn's disease.

In 2000, Ferring obtained import registration for its prolonged-release tablets and suppositories for clinical use in China. Subsequently, the sustained-release granules of Ethypharm were marketed in China. Then Dr. Falk Pharma GmbH obtained registration in China for its enema solution, suppositories and enteric coated tablets. After that, generic drugs from local Chinese companies were also marketed one after another.

According to CRI's market research, the sales value of mesalazine in China grew year-on-year from 2016 to 2019. 2020 saw a slight decline in mesalazine sales value in China due to the COVID-19 outbreak, which affected the proper function of Chinese healthcare facilities, reaching approximately CNY314 million (USD48.2 million), with a CAGR of 7.7% from 2016 to 2020. After years of market competition, in 2020, according to sales value, Ferring's mesalazine (trade name PENTASA®) only ranked third in the Chinese market, with the top two occupied by Dr Falk Pharma GmbH and Shanghai Aidefa Pharmaceutical.

It is expected that since the COVID-19 pandemic is under control in China, its mesalazine market will see growth from 2021 to 2025.

Topics Covered:

Impact of COVID-19 on China's Mesalazine Market

Development Environment of Mesalazine in China

Sales Volume of Mesalazine in China

Sales Volume and Value of Mesalazine in China by Region

Major Mesalazine Manufacturers in China and Their Market Shares

Sales Price of Mesalazine in China

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