

Ulcerative Colitis Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The ulcerative colitis market is expected to register a CAGR of 5.5% during the forecast period (2022-2027).

The medical and psycho-socioeconomic effects of the COVID-19 pandemic and pre-existing medical conditions such as acute severe ulcerative colitis were multidirectional and influenced the welfare of patients. According to a research study titled "Acute severe ulcerative colitis: confronting an intensified stressor during the COVID-19 pandemic" published in February 2021, the risk of adverse outcomes of COVID-19 has been reported to be higher in patients with ulcerative colitis. It continues to be a threat to patients with acute severe ulcerative colitis, posing an ever-growing risk to the global healthcare system. Thus, COVID-19 has had a significant impact on the growth of the market over the forecast period.

Factors such as the growing burden of ulcerative colitis, increasing patient assistance programs, and technological advancements coupled with increasing research are driving the growth of the market.

Ulcerative colitis (UC) is the most common form of inflammatory bowel disease and affects several people. According to a research article by Whitney D. Lynch et al., updated in June 2022, globally, ulcerative colitis has an incidence of 9 to 20 cases per 100,000 people per year. Its prevalence is 156 to 291 cases per 100,000 people per year. Ulcerative colitis has a higher prevalence in adults. Such a high burden of disease is expected to drive the growth of the market.

The increasing involvement of key players in product development related to the field is anticipated to drive the market's growth. For instance, in June 2021, in Japan, Takeda Pharmaceutical Company Limited started a phase III clinical trial to assess the efficacy and safety of intravenous (IV) Vedolizumab in Japanese patients with moderate to severe ulcerative colitis. The trial is expected to be completed in September 2024. This increasing focus of market players on the development of drugs for treatment is expected

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to boost the growth of the market in the future.

Additionally, the approval of the drugs is also propelling the growth of the market. For instance, in November 2021, Bristol Myers Squibb received marketing authorization from the European Commission for Zeposia (ozanimod) for the treatment of adults with moderately to severely active ulcerative colitis (UC) who have had an inadequate response, lost response, or are intolerant to either conventional therapy or a biologic agent.

Thus, the aforesaid factors are expected to boost the market's growth over the forecast period. However, factors such as high levels of unmet clinical need in ulcerative colitis (UC) and the side effects of medications are expected to impede market growth over the forecast period.

Ulcerative Colitis Market Trends

Ulcerative Proctitis Segment is Expected to Experience the Fastest Growth Over the Forecast Period

Ulcerative proctitis is one of the types of ulcerative colitis. It is considered the initial manifestation of ulcerative colitis, in which fine ulcerations in the inner linings of the mucosa of the large intestine are observed.

According to a research study by Anupam Kumar Singh et al., published in the United European Gastroenterology Journal in March 2021, the incidence rate of COVID-19 per 1,000 patients with inflammatory bowel disease (ulcerative colitis) and the general population was 4.02 and 6.59, respectively. The proportion of COVID-19-positive inflammatory bowel disease patients requiring hospitalization and intensive care unit care was 27.29% and 5.33%. The relative risks of hospitalization, intensive care unit admission, and mortality were lower for patients on biological agents but higher for patients on steroids or 5-aminosalicylate use. Thus, the SARS-CoV-2 infection risk in patients with inflammatory bowel disease was considerable in the general population. The outcomes of COVID-19-positive inflammatory bowel disease patients were worse in ulcerative colitis than those on steroids or 5-aminosalicylates.

Additionally, the launch of drugs by different market players is also propelling the growth of the market segment. For instance, in April 2021, Teva Pharmaceuticals USA, Inc., launched its 1000 mg generic version of Casana (mesalamine) suppository medicine used to treat adults with active ulcerative proctitis (ulcerative rectal colitis) in the United States.

Furthermore, the increasing number of research studies on drugs for the treatment of ulcerative proctitis is also contributing to the growth of the market. For instance, in October 2021, First Wave Biopharma Inc. dosed the first patient in a Phase 2b clinical trial investigating a topical formulation of niclosamide (FW-UP) as a potential treatment for patients with ulcerative proctitis (UP) and ulcerative proctosigmoiditis (UPS). Such increasing research activities are also boosting the growth of the market segment.

Thus, owing to the abovementioned factors, the market segment is expected to show significant growth over the forecast period.

North America is Expected to Hold a Significant Share in the Market Over the Forecasted Period

North America is expected to lead the ulcerative colitis market, owing to the presence of key players and the increasing prevalence of ulcerative colitis in the region, along with the continuing funding for the development of new therapeutics for the treatment of the condition.

The increasing research activities by the market players are also contributing to the growth of the market. For instance, in March 2021, in Canada, Eli Lilly and Company initiated a phase II clinical trial to assess the efficacy and safety of LY3471851 in adult patients with active ulcerative colitis (UC). The study is expected to be completed in October 2024. Thus, the above factors are

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expected to drive market growth over the forecast period in the region.

Additionally, the approvals from regulatory authorities such as the United States Food and Drug Administration, Health Canada, and others are also propelling the growth of the market. For instance, in May 2021, Bristol Myers Squibb received approval from the United States Food and Drug Administration (FDA) for Zeposia (ozanimod) in the treatment of adults with moderately to severely active ulcerative colitis (UC), a chronic inflammatory bowel disease (IBD).

Thus, owing to the abovementioned factors, the studied market in the North American region is expected to project growth over the forecast period.

Ulcerative Colitis Market Competitor Analysis

The ulcerative colitis market is moderately competitive. The companies implement certain strategic initiatives, such as mergers, new product launches, acquisitions, and partnerships, that help them strengthen their market position. Some of the market players include Bausch Health Companies Inc., Johnson & Johnson, Merck & Co., Inc., AbbVie Inc. (Allergan, Inc.), and Novartis AG, among others.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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