CLOSER LOOK

MEMORANDUM

China adds Ozempic (semaglutide for T2D) to its National Essential Medicines List – July 9, 2026

Beginning in September 2026, all public hospitals in China will be required to prioritize stocking Ozempic

China's National Health has added semaglutide to its National Essential Medicines List (NEML), as reported by Reuters. This makes semaglutide the second GLP-1 RA for T2D added to the list, which also includes liraglutide. Injectable semaglutide indicated for T2D will be included on the list starting September 1, 2026. Currently, semaglutide for T2D is only approved in China under Novo Nordisk's Ozempic brand, but this update could pave the way for widespread availability of generic semaglutide once Ozempic loses its market exclusivity in April 2027.

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NEML ensures nationwide availability of semaglutide in public medical institutions

The new NEML features nearly 800 drugs, expanding on its previous 2018 edition, which included liraglutide, Novo Nordisk's once-daily injectable GLP-1 RA. The government-mandated list represents medications that are required to be stocked, prioritized, and prescribed within public medical institutions. Therefore, the essential listing of semaglutide ensures its availability throughout China, even in remote rural hospitals.

Update paves way for introduction of generic semaglutide into Chinese markets

The addition of semaglutide comes during a time when China is estimated to have the highest number of adults with diabetes in the world. This, coupled with the recent patent expiration on semaglutide, has driven rapid development of generic GLP-1 RAs in China. In March 2026, Novo Nordisk's patent for semaglutide expired in several countries, including China. However, based on the China-Switzerland Free Trade Agreement, Novo Nordisk's Ozempic is entitled to market exclusivity until April 2027 due to provisions for regulatory data protection with a Swiss subsidiary of Novo Nordisk.

Nevertheless, many Chinese manufacturers are poised to introduce cheaper generic versions. Among these, Huadong Medicine's injectable semaglutide, Jiyoutai, is expected to be the first to launch, having filed its New Drug Application in April 2024. Other companies, such as United Laboratories and Qilu Pharmaceutical, also have generic semaglutide therapies in phase 3 development.

China's GLP-1 RA pipeline continues to expand into oral formulations

Development of oral GLP-1 RAs for T2D and obesity is also underway in China. Earlier this week, China-based Hengrui Pharma announced, alongside its Massachusetts-based partner Kailera Therapeutics, its positive topline results from two phase 3 trials of its oral GLP-1 RA HRS-7535 (also known as KAI-7535). Hengrui intends to submit new drug applications (NDAs) for the therapy for T2D and obesity in China. We are closely watching how China's continued expansion of GLP-1 RAs for T2D shapes treatment access and market dynamics in the years ahead.

Close Concerns' Questions

1. Given that Ozempic is entitled to market exclusivity until April 2027, how does this update influence Novo Nordisk's strategic plan in China?
2. Might a future update include expansion to GLP-1 RAs for the management of obesity?

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