



MINDPOWER SOLUTIONS

APRIL
2012

India Diabetes Industry Research and Forecasts to 2016

- Shift towards Modern Insulin Delivery
Devices

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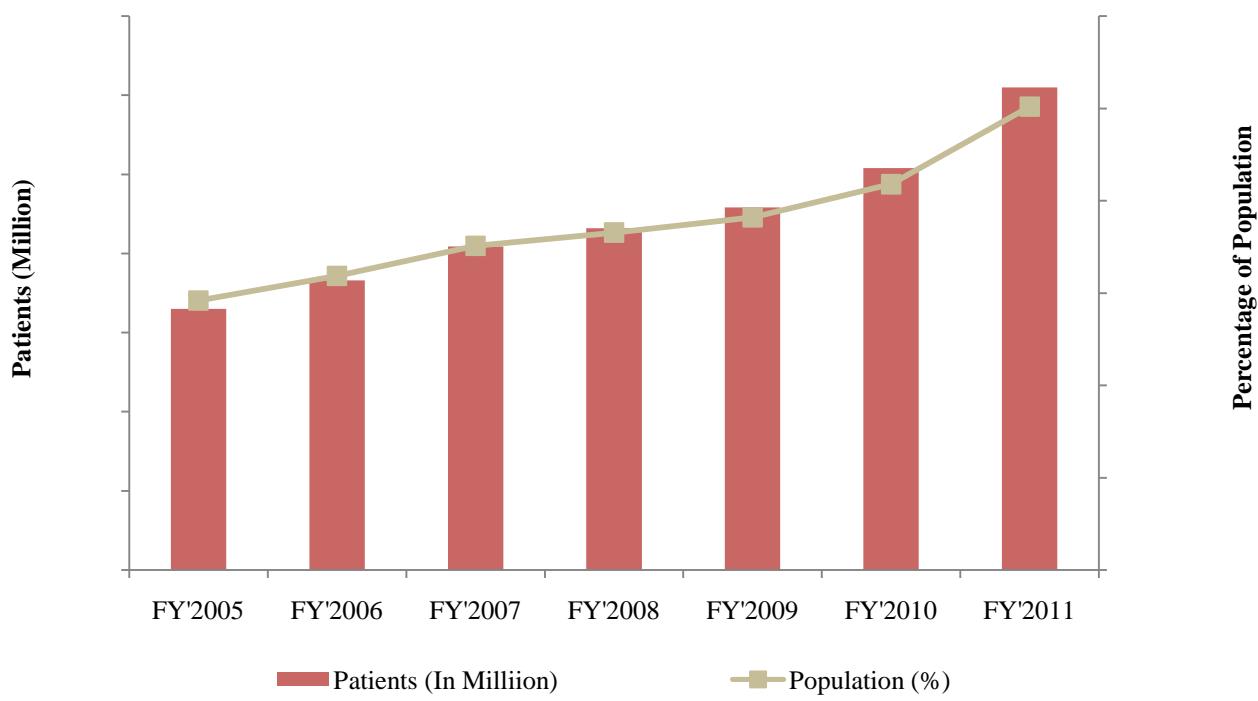
INDIA DIABETES MARKET SIZE, FY'2005-FY'2011

BY NUMBER OF DIABETES PATIENTS, FY'2005-FY'2011

The diabetes market in India is one of the largest markets in the world. The number of diabetes patients in India has increased at a CAGR of ~ % over the period of six years from FY'2005-FY'2011. In FY'2011 the number impelled by ~ % to ~ million diabetes affected people as compared to ~ million in FY'2009. The reason for.....

“ The reason for growing number of diabetic patients in India can be attributed primarily to the food habits and sedentary lifestyle of the population of India. ”

Figure: Total Number of Diabetic Patients in India in Million and the Percentage of Population Suffering From Diabetes in India, FY'2005-FY'2011



INDIAN DIABETES MARKET SEGMENTATION, FY'2005-FY'2011

BY TYPE 1 AND TYPE 2 DIABETES PATIENTS, FY'2005 -FY'2011

The Indian diabetic market is dominated by Type 2 diabetic patients which accounts for around ~% of the total diabetic population in India in FY'2011. The contribution of Type 2 diabetic patients have declined marginally over the period due to the rapid increase of Type 1 patients as compared to Type 2 patients. The contribution of Type 2 diabetic ...

Table: Indian Diabetes Market Segmentation by Type of Patients-Type 1 and Type 2 Diabetes on the Basis of No. of Patients in Million, FY'2005-FY-2011

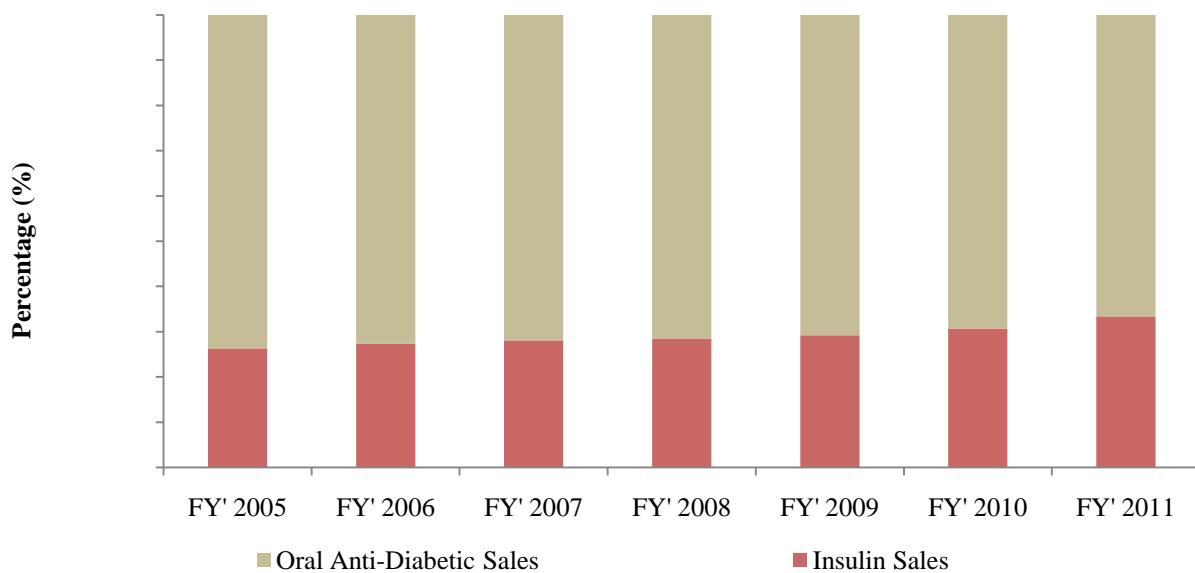
Particulars	FY'2005	FY'2006	FY'2007	FY'2008	FY'2009	FY'2010	FY'2011
Type 2							
Type 1							
Total							

INDIAN ANTI-DIABETIC DRUGS MARKET SEGMENTATION, FY'2005-FY'2011

BY INSULIN AND ORAL ANTI- DIABETIC DRUGS, FY'2005 -FY'2011

The anti-diabetic drug market is dominated by oral anti-diabetic drugs, contributing around ~ % of the total anti-diabetic sales in India in FY'2011. Although the contribution of this segment of the anti-diabetic drug market has declined over the years, the volume sales of oral/ non-insulin anti-diabetic drugs have increased from USD ~ million in FY' 2005 to USD ~ million in FY'2011...

Figure: Indian Anti-Diabetic Drug Market Segmentation by Insulin and Oral Anti-Diabetic Drug on the Basis of Sales in Percentage, FY'2005-FY'2011



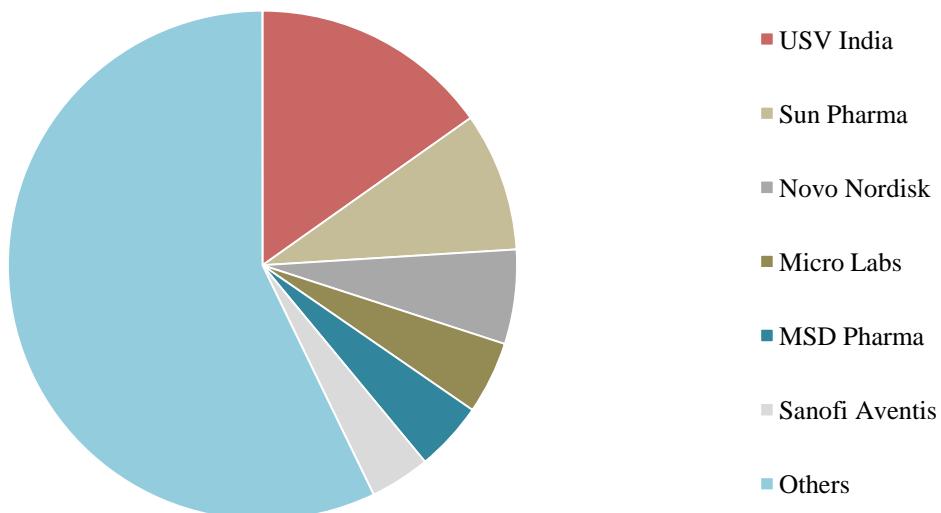
INDIAN ANTI-DIABETIC DRUG MARKET COMPETITIVE LANDSCAPE, FY'2005-FY'2011

MARKET SHARE OF MAJOR MANUFACTURERS OF ORAL ANTI-DIABETIC DRUG, FY'2011

Over the past 5 years the oral anti-diabetic drug sales in India has increased at a CAGR of ~ The sales of this segment has inclined to USD ~ million in 2011 from USD ~ million in 2005 on account of continuous surge in the number of diabetic patients in India.

Oral Anti-diabetic drug market is extremely fragmented market comprising of several players. USV India is the market leader in Oral Anti-diabetic segment in India followed by Sun Pharma.....

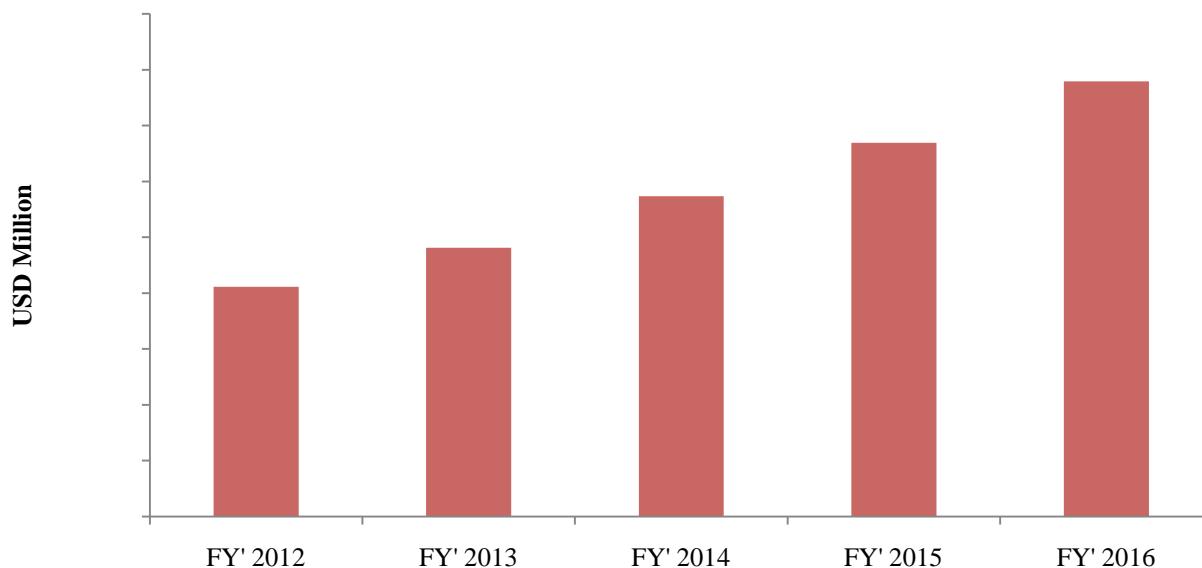
Figure: Market Share of Major Manufacturers of Oral Anti-Diabetic Drug on the Basis of Sales in Percentage, FY'2011



**INDIAN ANTI-DIABETIC DRUG MARKET FUTURE PROJECTION,
FY'2012-FY'2016**

The insulin anti-diabetic drug market is estimated to reach USD ~ million (INR ~ crore) with a share contribution of around ~ % in total anti-diabetic market in India. The average price of anti-diabetic drug market is expected to grow to USD ~ (INR ~) in FY'2016 from USD ~ (INR ~) in FY'2012, at a CAGR of ~ %.....

Figure: Indian Anti-Diabetic Drug Market Future Projection on the Basis of Sales in USD Million, FY'2012- FY'2016



INSULIN AND ORAL ANTI- DIABETIC DRUG MARKET FUTURE PROJECTIONS, FY'2012-FY'2016

The Insulin drug sale is expected to showcase a significant growth in the near future on account of several factors such as, rising preference for insulin drugs amongst the consumers due to the prevalence of several side effects involved in consuming oral anti-diabetic drugs. It is expected that by FY'2016 the Insulin drug market in India will reach USD ~ million (INR ~ crore) registering a CAGR of ~ %. The surge in Insulin segment will be driven by introduction of technologically developed products such as insulin pumps.....

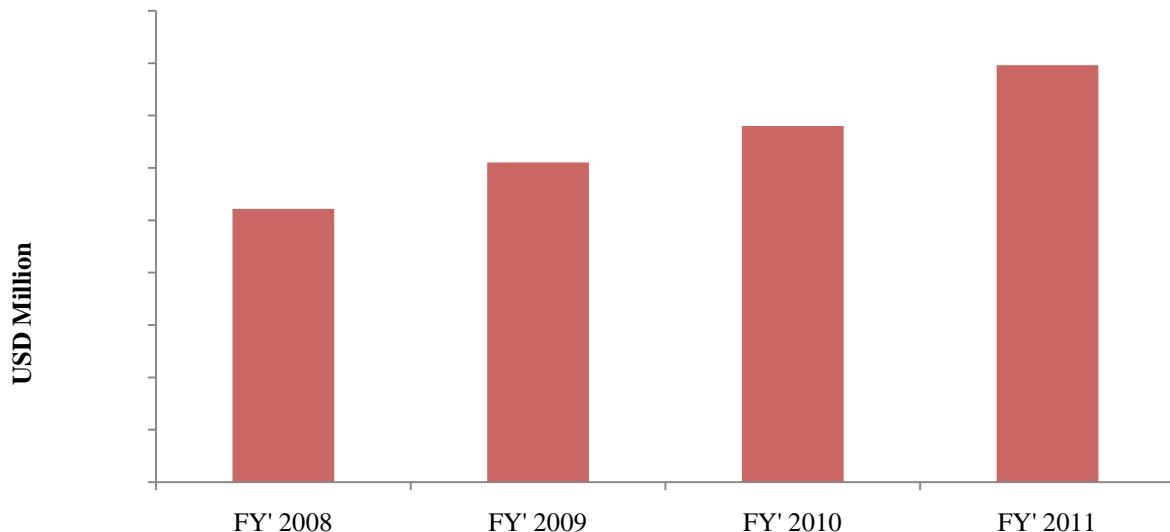
Table: Indian Insulin and Oral Anti-Diabetic Drug Market Future Projection on the Basis of Sales in USD Million, FY'2012-FY'2016

Particulars	FY'2012	FY'2013	FY'2014	FY'2015	FY'2016
Oral Anti-Diabetic Drug					
Insulin Anti-Diabetic Drug					
Total					

INDIA DIABETES DEVICE MARKET SIZE BY VALUE, FY'2005-FY'2011

The diabetes device market in India is majorly driven by diabetic testing devices, which includes test strips, lancets and meters. The diabetic testing device market in India grew up to USD ~ million (INR ~ crore) in FY'2011 from USD ~ million (INR ~ crore) in FY'2008, registering a CAGR of 15.1%.

Figure: Indian Diabetes Device Market Size on the Basis of Sales in USD Million, FY'2008-FY'2011



INDIAN DIABETES DEVICE MARKET SEGMENTATION, FY'2005-FY'2011

BY DIABETIC TESTING AND DELIVERY DEVICES, FY'2011

The diabetic testing device segment dominates ~ % of the Indian diabetic device care market in FY'2011... Test strips dominate the diabetic testing device segment in India accounting for ~% of the market in FY' 2011 followed by lancets and meters contribution ~% and ~% of the diabetic device care sales in India

Figure: India Diabetes Device Market Segmentation by Diabetic Testing and Insulin Delivery Devices on the Basis of Sales in Percentage, FY'2011

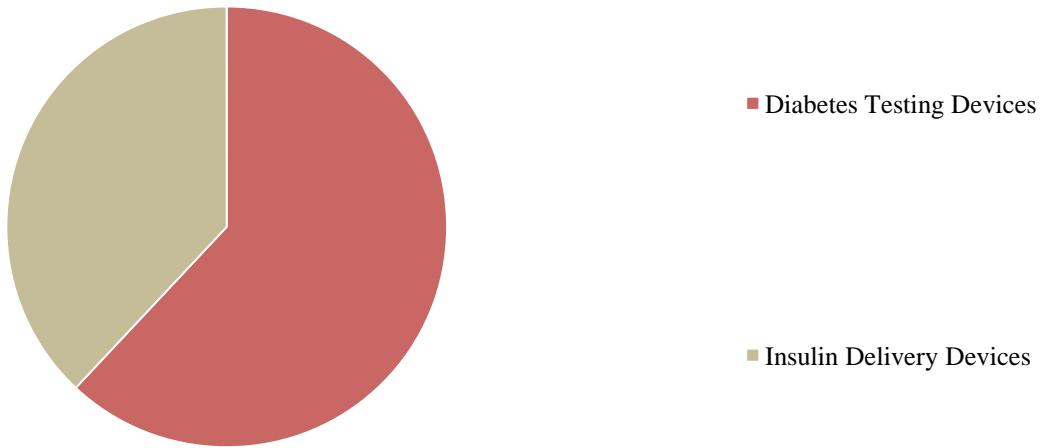
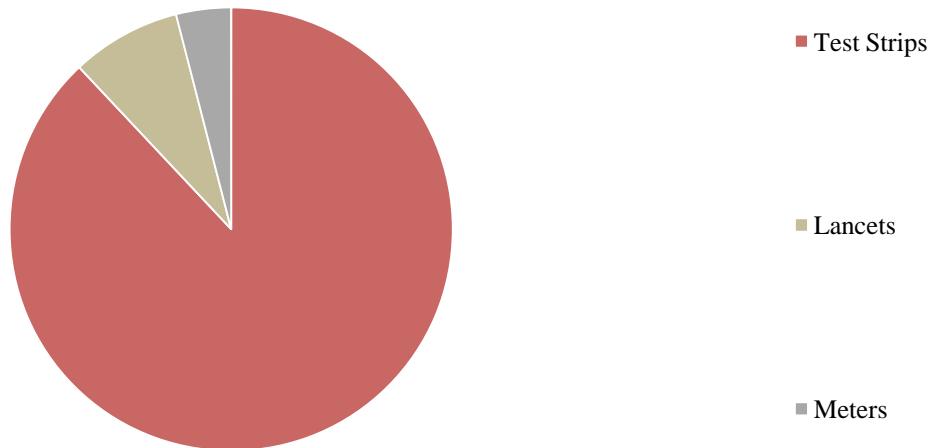


Figure: India Diabetes Testing Devices Market Segmentation by Test Strips, Lancets and Meters on the Basis of Sales in Percentage FY'2011



...Vial and syringes has traditionally dominated the insulin delivery devices market however with the introduction of modern insulin delivery devices, the market share of traditional devices is deteriorating...

Figure: India Insulin Delivery Devices Market Segmentation by Vial and Syringes, Insulin Pens and Prefilled Pens on the Basis of Sales in Percentage FY'2011

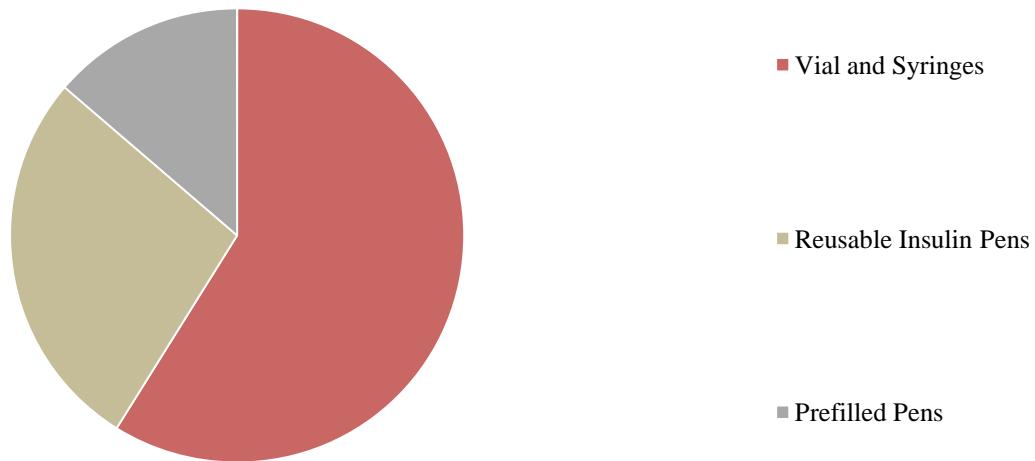


Table: Major Modern Insulin Delivery Devices Brands Available in India

Brand	Company/ Manufacturer	Description
Autopen		▪
Humalog KwikPen, Original Humalog Pen, Humalog Mix 75/25 Pen, Humalog Mix 50/50 Pen, Humulin N Pen and Humulin 70/30 Pen		▪
HumaPen Luxura HD		▪
HumaPen Memoir		▪
Lantus SoloStar		▪
FlexPen		▪
NovoPen Junior		▪
NovoPen 3		▪

OptiClik		▪
INSUPen		▪

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