



MINDPOWER SOLUTIONS

A P R I L

2012

India Diabetes Industry Research and Forecasts to 2016

- Shift towards Modern Insulin Delivery
Devices

TABLE OF CONTENTS

1. India Diabetes Market Introduction
2. India Diabetes Market Size, FY'2005-FY'2011
 - 2.1. By Number of Diabetes Patients, FY'2005-FY'2011
3. India Diabetes Market Segmentation, FY'2005-FY'2011
 - 3.1. By Type 1 And Type 2 Diabetes Patients, FY'2005-FY'2011
4. India Anti-Diabetic Drug Market Introduction
 - 4.1. India Anti-Diabetic Drug Market Size by Value, FY'2005-FY'2011
 - 4.2. India Anti-Diabetic Drugs Market Segmentation, FY'2005-FY'2011
 - 4.2.1. By Insulin and Oral Anti- Diabetic Drugs, FY'2005-FY'2011
 - 4.3. India Anti-Diabetic Drug Market Trends and Developments
 - Shifting Preference towards Insulin from oral anti-diabetic drugs
 - Mounting Proportion of Undiagnosed Diabetes Patients
 - Rising Distribution and Marketing Alliances
 - 4.4. India Anti-Diabetic Drug Market Competitive Landscape, FY'2005-FY'2011
 - 4.4.1. Market Share of Major Players in Insulin Market, FY'2005-FY'2011
 - 4.4.2. Market Share of Major Players in Oral Anti-Diabetic Drugs, FY'2011
 - 4.5. India Anti-Diabetic Drug Market Future Outlook
 - 4.5.1. Cause and Effect Relationship Between Dependent and Independent Factors in the India Anti-Diabetic Drug Market
 - 4.5.2. India Anti-Diabetic Drug Market Future Projections, FY'2012-FY'2016
 - 4.5.3. Insulin and Oral Anti- Diabetic Drug Market Future Projections, FY'2012-FY'2016
 - 4.6. Company Profiles of Major Players in Insulin Market
 - 4.6.1. Novo-Nordisk India
 - Company Overview
 - Business Strategies

Financial Performance

4.6.2. Eli Lilly

Company Overview

Business Strategies

Financial performance

4.6.3. Sanofi-Aventis

Company Overview

Business Strategies

Financial Performance

4.7. Company Profiles of Major Players in the Indian Oral Anti-Diabetic Drug Market, FY'2011

5. India Diabetes Device Market Introduction

5.1. India Diabetes Device Market Size by Value, FY'2005-FY'2011

5.2. India Diabetes Device Market Segmentation, FY'2005-FY'2011

5.2.1. By Diabetic Testing and Delivery Devices, FY'2011

5.3. India Diabetes Device Market Trends and Developments

Rising Usage of Modern Insulin Delivery Devices

Advancement in Technology

5.4. Competitive Landscape of Major Players in the India diabetes Testing Device Market, FY'2011

5.5. India Diabetes Device Market Future Outlook

5.5.1. Cause and Effect Relationship Between Dependent and Independent Factors in the India Diabetes Device Market

5.5.2. India Diabetes Device Market Future Projections, FY'2012-FY'2015

6. Macro-Economic and Industry Factors: Current And Projections

6.1. Number of Diabetic Patients in India, FY'2005-FY'2016

6.2. India Pharmaceutical Industry Sales, 2005-2016

6.3. India Pharmaceutical Research and Development Expenditure, 2005-2016

- 6.4. Health Expenditure in India, 2005-2016
- 6.5. Personal Disposable Income of India, 2005-2016
- 7. Market Definition
- 8. Abbreviations
- 9. Appendix
 - 9.1. Research Methodologies
 - Data Collection Methods
 - Approach
 - Variables (Dependent and Independent)
 - Multi Factor Based Sensitivity Model
 - Final Conclusion
 - 9.2. Disclaimer

LIST OF FIGURES

Figure 1: Total Number of Diabetic Patients in India in Million and the Percentage of Population Suffering From Diabetes in India, FY'2005-FY'2011

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

Figure 3: Anti-Diabetic Drug Market Size on the Basis of Sales in USD Million, FY'2005- FY-2011

Figure 4: Average Price of Anti-Diabetic Drug in India in USD, FY'2005-FY'2011

Figure 5: Indian Anti-Diabetic Drug Market Segmentation by Insulin and Oral Anti-Diabetic Drug on the Basis of Sales in Percentage, FY'2005-FY'2011

Figure 6: Market Share of Major Manufacturers of Insulin Drugs on the Basis of Sales in Percentage, FY'2011

Figure 7: Market Share of Major Manufacturers of Oral Anti-Diabetic Drug on the Basis of Sales in Percentage, FY'2011

Figure 8: India Anti-Diabetic Drug Market Future Projection on the Basis of Sales in USD Million, FY'2012- FY'-2016

Figure 9: Average Price Projection of Anti-Diabetic Drugs in India in USD, FY'2012-FY'2016

Figure 10: India Insulin and Oral Anti-Diabetic Drugs Market Future Projections on the Basis of Sales in Percentage, FY'2012-FY'2016

Figure 11: Indian Diabetes Device Market Size on the Basis of Sales in USD Million, FY'2008-FY-2011

Figure 12: India Diabetes Device Market Segmentation by Diabetic Testing and Insulin Delivery Devices on the Basis of Sales in Percentage, FY'2011

Figure 13: India Diabetes Testing Devices Market Segmentation by Test Strips, Lancets and Meters on the Basis of Sales in Percentage FY'2011

Figure 14: India Insulin Delivery Devices Market Segmentation by Vial and Syringes, Insulin Pens and Prefilled Pens on the Basis of Sales in Percentage FY'2011

Figure 15: India Diabetes Device Market Future Projections in USD Million, FY'2012-FY'2015

Figure 16: Number of Diabetic Patients in India in Million, FY'2005-2016

Figure 17: Indian Pharmaceutical Market Revenue in USD Million, 2005-2016

Figure 18: Indian Pharmaceutical R&D Expenditure in USD Million, 2005-2016

Figure 19: Healthcare Expenditure in India in USD Million, 2005-2016

Figure 20: Personal Disposable Income of India in USD Million, 2005-2016

SAMPLE

LIST OF TABLES

Table 1: Indian Anti-Diabetic Market Segmentation by Type 1 and Type 2 Diabetes Patients in Million, FY'2005-FY-2011

Table 2: Indian Anti-Diabetic Drug Market Segmentation by Insulin and Oral Anti-Diabetic Drug on the Basis of Sales in USD Million, FY'2005-FY'2011

Table 3: Market Share of Major Manufacturers of Insulin Drugs on the Basis of Sales in USD Million, FY'2011

Table 4: Market Share of Major Manufacturers of Oral Anti-Diabetic Drug on the Basis of Sales in USD Million, FY-2011

Table 5: Cause and Effect Relationship Analysis between Industry Factors and Expected India Anti-Diabetic Drugs Market Prospects

Table 6: India Insulin and Oral Anti-Diabetic Drug Market Future Projection on the Basis of Sales in USD Million, FY'2012-FY'2016

Table 7: Novo Nordisk India Insulin Product Line, Brand and Description

Table 8: Company Profile of Major Players in the Indian Oral Anti-Diabetic Market, FY'2011

Table 9: Major Modern Insulin Delivery Devices Brands Available in India

Table 10: Competitive Landscape of Major Players in India Diabetes Testing Device Market, FY'2011

Table 11: Competitive Landscape of Major Players in India Insulin Delivery Device Market, FY'2011

Table 12: Cause and Effect Relationship Analysis between Industry Factors and Expected India Diabetes Device Market Prospects

Table 13: Correlation Matrix of the Indian Anti-Diabetic Drug Market

Table 14: Regression Coefficients Output of the Indian Anti-Diabetic Drug Market

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

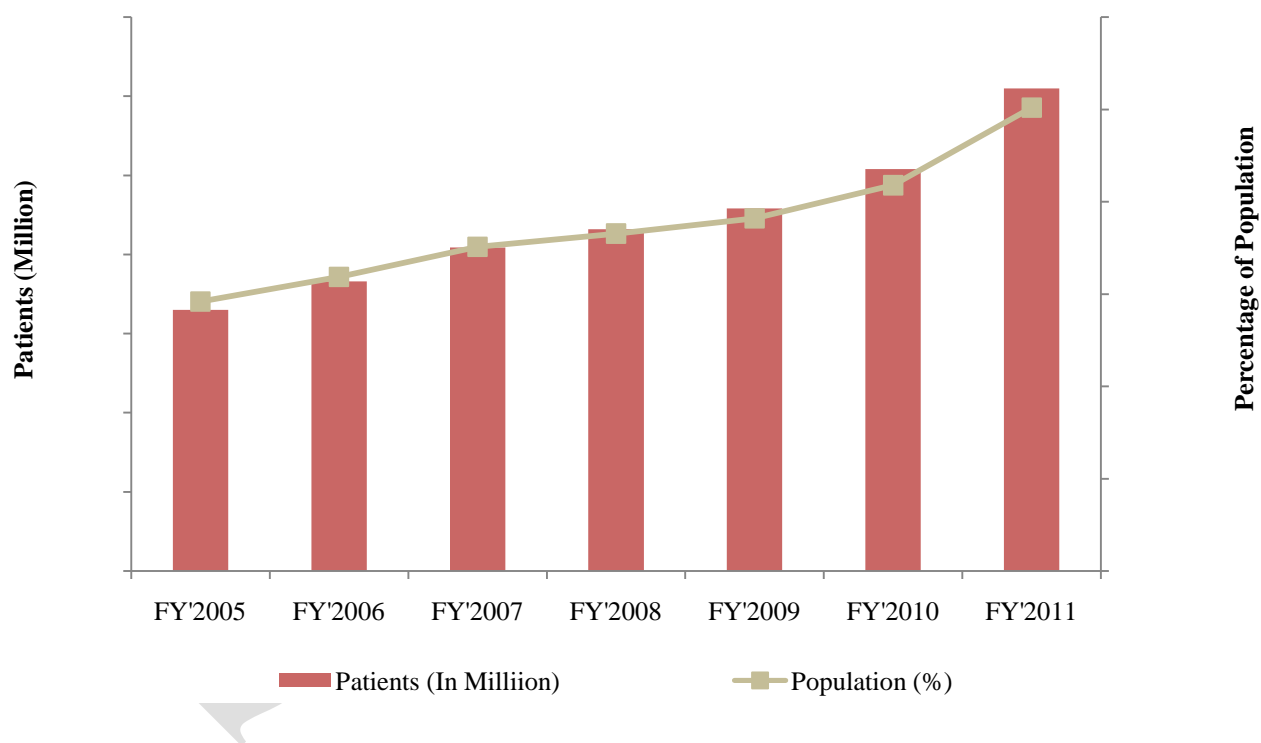
BY NUMBER OF DIABETES PATIENTS, FY'2005-FY'2011

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

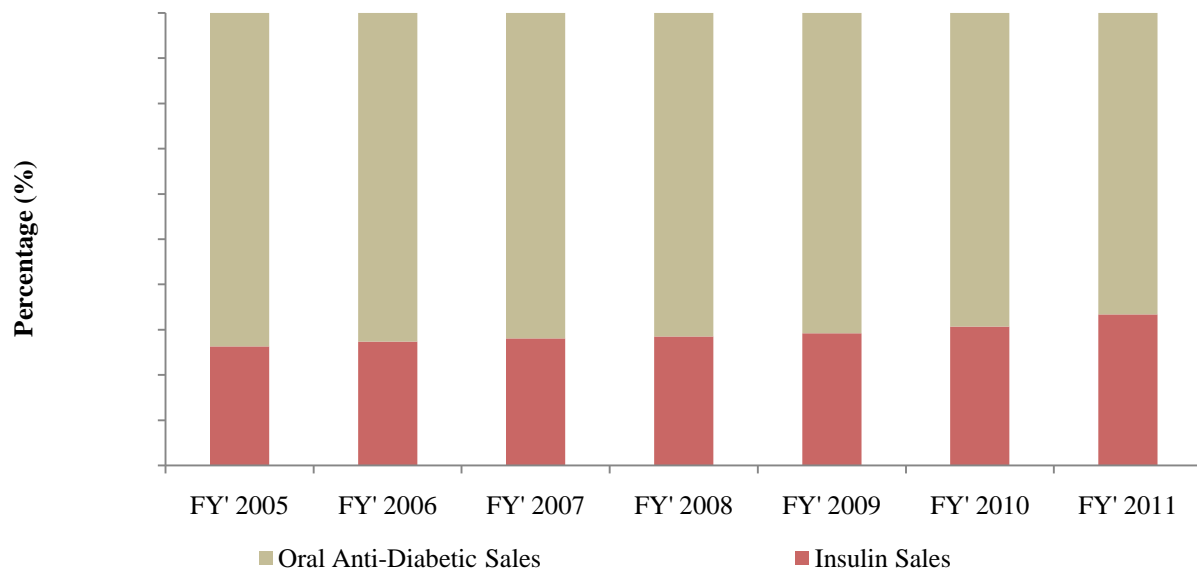
Particulars	FY'2005	FY'2006	FY'2007	FY'2008	FY'2009	FY'2010	FY'2011
Type 2							
Type 1							
Total							

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



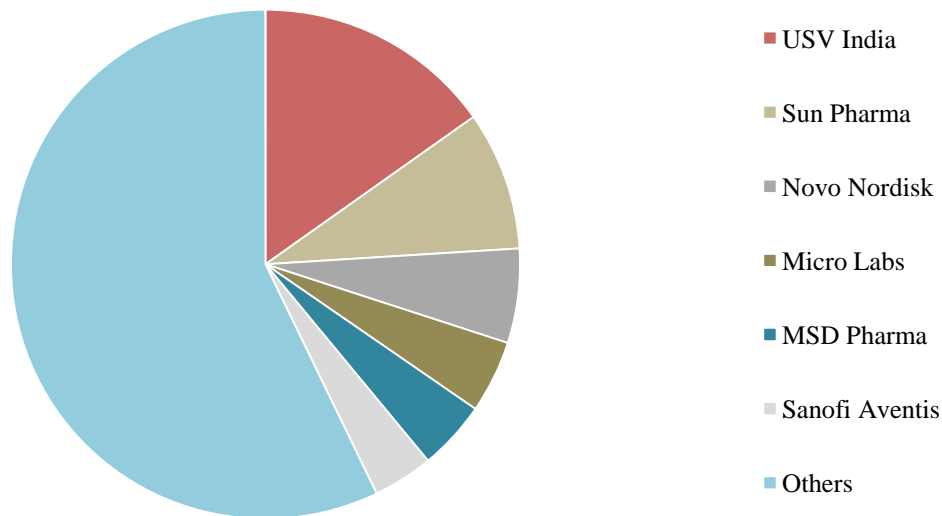
INDIAN ANTI-DIABETIC DRUG MARKET COMPETITIVE LANDSCAPE, FY'2005-FY'2011

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.....

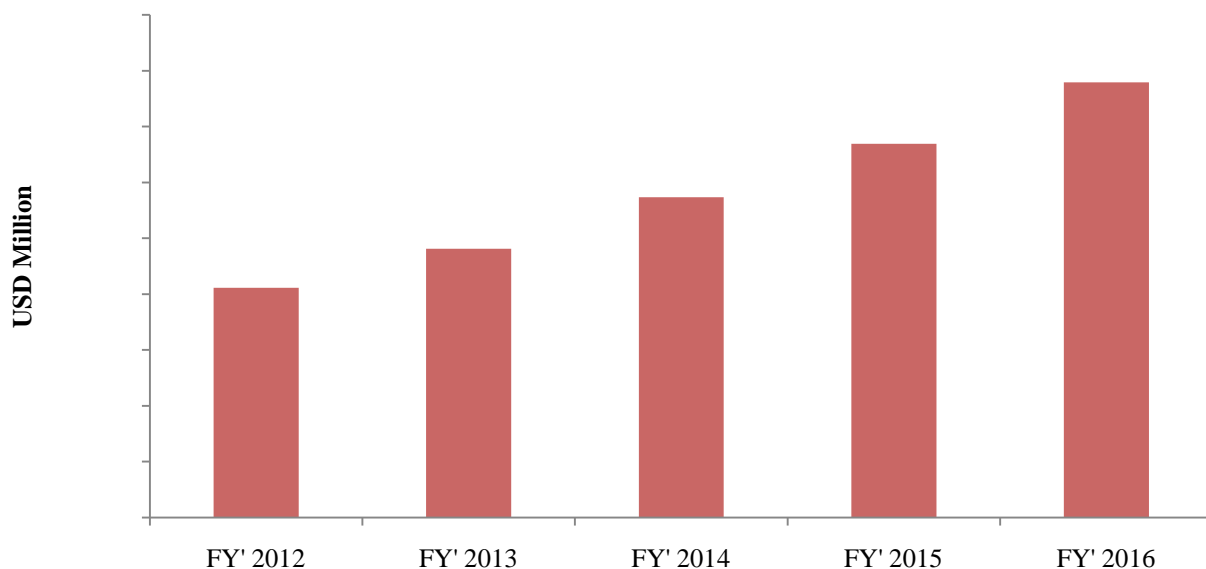
Figure: Market Share of Major Manufacturers of Oral Anti-Diabetic Drug on the Basis of Sales in Percentage, FY'2011



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.....

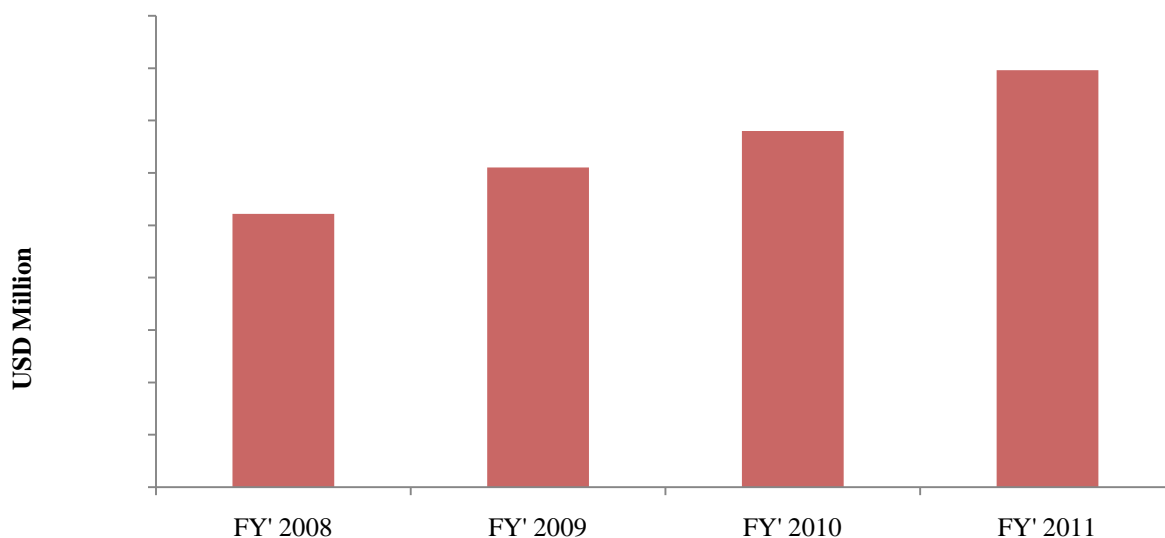
Table: Indian Insulin and Oral Anti-Diabetic Drug Market Future Projection on the Basis of Sales in USD Million, FY'2012-FY'2016

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

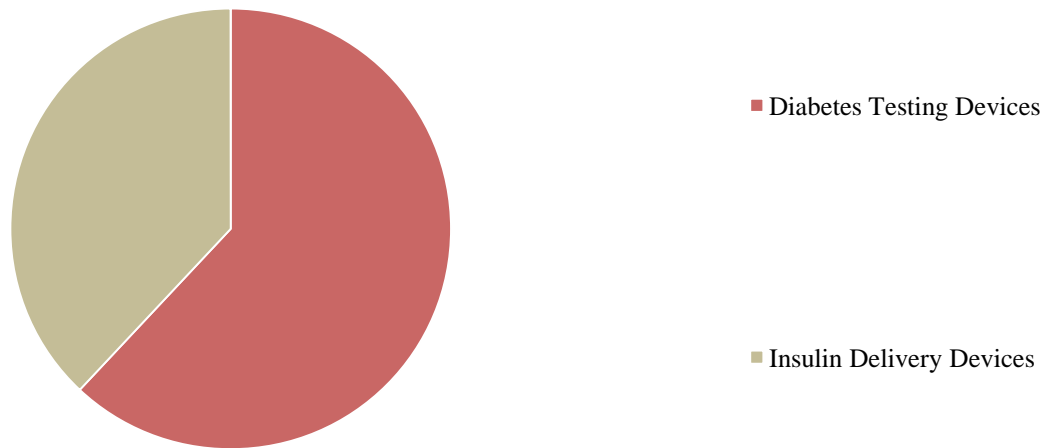
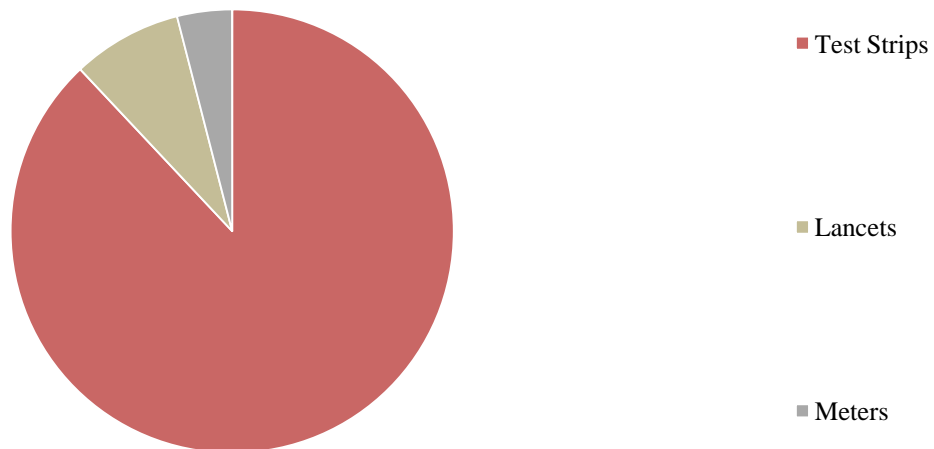


Figure: India Diabetes Testing Devices Market Segmentation by Test Strips, Lancets and Meters on the Basis of Sales in Percentage FY'2011



...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

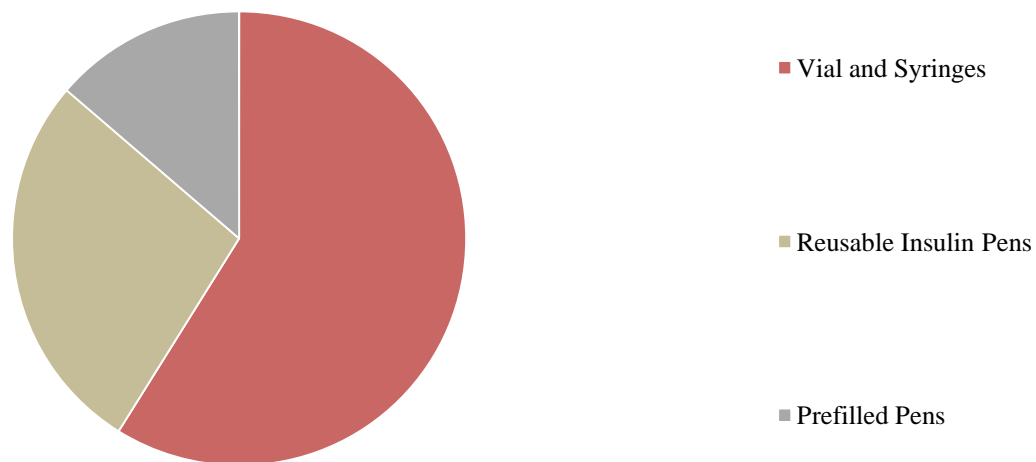


Table: Major Modern Insulin Delivery Devices Brands Available in India

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		▪

DISCLAIMER

No part of this manual or any material appearing may be reproduced, stored in or transmitted on any other Web site without written permission of AM Mindpower Solutions and any payments of a specified fee. Requests to republish any material may be sent to us.