

India Diabetes Industry Research and Forecasts to FY'2016 - Shift towards Modern Insulin Delivery Devices

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Abstracts

The report titled “India Diabetes Industry Research and Forecasts to FY’2016 – Shift towards Modern Insulin Delivery Devices” provides a comprehensive analysis on the market size of diabetes industry on the basis of number of diabetic patients in India, sales of anti-diabetic drugs and diabetes devices in India, market segmentation by Type 1 and Type 2 diabetic patients, Insulin and oral anti-diabetic drug market in India. The report also entails the size of diabetes testing devices and insulin delivery devices segments further categorized into test strips, glucose meters, lancets, vial and syringes, reusable insulin pens and prefilled pens. The report also covers competitive landscape and profiles of major players operating in the diabetes industry.

India is the second largest diabetes-affected nation in the world after China (~ million), accounting for ~ million diabetic patients followed by the US (~ million) in 2011. India contributed maximum to regional mortality with ~ deaths caused due to diabetes in 2011. The most affected diabetic patients falls in the age group of 40-59 years which accounts about ~% of total diabetic population and the least affected age group is 20-39 accounting ~% of total diabetic patients in India. Despite a high prevalence rate of diabetes, the country spends merely about USD ~ million which is just 1% of the total diabetes spending worldwide.

Indian anti-diabetic drugs market contributed around ~% of total global anti-diabetic drugs market. In FY’2008, the value of anti-diabetic drugs market in India was USD ~ million which grew up to USD ~ million in FY’2011. The most popular oral anti-diabetic drugs are biguanides, gliclazide, gliclazide with metformine, rosiglitazone and Pioglitazone of which biguanides contributed around ~% market share.

The Indian diabetes market is fragmented with the presence of several players such as Novo Nordisk, Eli Lilly, Sanofi-Aventis, Biocon, Wockhardt, Shreya Lifescience, GlaxoSmithKline, Panacea Biotech, Strides Acrolab, Torrent Pharmaceuticals, Ranbaxy, Dr. Reddy's, Cipla and Sun Pharmaceuticals.

Novo-Nordisk is the market leader in the Insulin market with the share of ~% followed by Eli Lilly with market share of ~% in 2011. While in oral diabetic market, USV India is the market leader with ~% market share followed by Sun Pharma and Novo-Nordisk with market share of ~% and ~% respectively.

The insulin market is estimated to reach USD ~ million (INR ~ crore) by FY'2016 with a share contribution of around ~% in total anti-diabetic drugs market in India.

The diabetes testing device segment dominated the Indian diabetic device market in FY'2011 with the market share of ~%. 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. The reusable modern insulin delivery devices are seemingly becoming the widely used injectables in India.

Insulin delivery device segment will continue to register growth with the advances in non-intrusive insulin delivery methods. With the increasing pervasiveness of diabetes in India, the country will witness a slew of insulin pens and pumps in the coming years. There are atleast ~ brands of insulin pens which are currently available in the market. It is estimated that the diabetes device market will increase to USD ~ million (INR ~ crore) by FY'2015 at a CAGR of ~%.

Key Topics Covered in the Report:

The market size of the India diabetes market on the basis of number of type 1 and type 2 diabetes patients, FY'2005-FY'2011

The Indian anti-diabetic drug and diabetes device market size on the basis of revenue, FY'2005-FY'2011

Market segmentation of anti-diabetes drugs market into Insulin and Oral anti-diabetic drug sales and diabetes devices into testing (test strips, lancets and meters) and delivery devices (vial and syringes, reusable insulin pens, prefilled insulin pens), FY'2005-FY'2011

Trends and developments in the Indian Anti-diabetic drug and Device Care market

Competitive landscape of the Insulin, Oral anti-diabetic drug, diabetes testing and delivery devices segment in India, FY'2011

Future outlook and projections of Indian anti-diabetic drugs and diabetes device market on the basis of sales, FY'2012-FY'2016

Macroeconomic and industry factors including number of diabetes patients in India, personal disposable income, Indian Pharmaceutical market revenue and R&D expenditure and health expenditure, FY'2005-FY'2016

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