

Indian Diabetes Market Report & Outlook For 2010-2015

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Abstracts

With around 51 Million diabetes patients, India promises to be amongst the most lucrative diabetes markets in the world. In 2009, the total sales of Insulin and Non-Insulin Anti-diabetics reached US\$ 424 Million. Although, this represents just a fraction of the global sales, IMARC expects this market to surge in the future.

In 2009, Non-Insulin Anti-diabetics occupied 72% of the total diabetes market. Biguanides represented the leading drug class with a 43% market share. In the next five years, IMARC expects newer classes such as DPP-IV Inhibitors and GLP-1 Agonists to drive the Non-Insulin Anti-diabetics market. From a market share of 6% in 2009, IMARC expects DPP-IV Inhibitors to occupy 17% of the total Non-Insulin Anti-diabetics market by 2015.

Unlike Non-Insulin's, the Insulin market in India was concentrated with the top five players occupying 96% of the total market. The Insulin market is expected to grow at a CAGR of 25% between 2010 and 2015, registering sales worth US\$448 Million. During the next five years, the main drivers of this market will be the growth in the total drug treated population coupled with a much improved access and administration of Insulin.

Report Highlights

A growing drug treated population coupled with the launch of several new drugs will drive the Indian diabetes market to US\$1.4 Billion by 2015.

In 2009, the market for Non-Insulin Anti-diabetics was worth US\$ 306 Million. This represented a highly fragmented market with USV being the leading player with a 14% share.

USV's Glycomet GP (Glimepiride+Metformin) was the leading drug in the Non-Insulin Anti-diabetics market with sales worth nearly US\$ 10.5 Million

IMARC expects around 15 new Drugs to be launched in the Non-Insulin Anti-diabetics market in the next five years. Seven of them are expected to be in the DPP-IV Inhibitor and GLP-1 Agonist classes.

The Insulin Market was worth US\$ 117 Million in 2009. Abbott was India's biggest player accounting for 61% of the total sales.

Sanofi Aventi's Lantus (Insulin Glargine) represented one of the fastest growing drugs in the last five year and registered sales worth nearly 11 Million in 2009

The total number of diabetes patients in India is expected to reach 87 Million by 2030. Around 56% of these patients will be from urban regions.

Forecasts: The report provides forecasts on:

Number of diabetes patients

Diagnosis and treatment rates in India

Diabetes market

Non-Insulin Anti-diabetics market

Glitazones

Biguanides

Sulphonylureas

Alpha-Glycosidase Inhibitors

DPP-IV Inhibitors

GLP-1 Agonists

Glinides

All other Non-Insulin Anti-diabetic classes

Insulin market

Competitive Landscape: This section covers:

2005-2009 sales and market shares of top players in the diabetes market

2005-2009 sales and market shares of top players in the Non-Insulin Anti-diabetics market

2005-2009 sales and market shares of top players in various Non-Insulin drug classes

2005-2009 sales of top drugs comprising the portfolio of key players in various Non-Insulin drug classes

2005-2009 sales and market shares of top players in the Insulin market

2005-2009 sales of top drugs comprising the portfolio of key players in the Insulin market.

Key Questions Answered in this report

What is the total size of the diabetes population in India and what are its characteristics?

What are the diagnosis and drug treatment rates for diabetes in India?

What are the key factors driving the growth of diabetes medication in India?

What is the size and breakup of the total diabetes market in India?

What is the size and breakup of the total Non-Insulin diabetes market in India?

What is the size and breakup of the total Insulin market in India?

Who are the key players in the Indian diabetes market and how have they performed?

What is the outlook of the Indian diabetes market in the next five years?

Which new products are expected to be launched in the next five years?

Which therapy classes will show the highest growth in the next five years?

What are the road blocks in the Indian diabetes market?

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COMPANIES MENTIONED

USV

Sun Pharma

Franco Indian

Piramal

Panacea Biotec

Micro Labs

Daiichi

Sanofi-Aventis

Dr Reddys Lab

Servier

Bayer

Glenmark

Lupin

Msd

Novartis

Fourts

Charak Pharma

Intas

Himalaya

Abbott

Torrent

Orchid Chemicals & Pharmaceuticals

Lilly

PRODUCTS MENTIONED

Glimepiride+Metformin
Glipizide+Metformin
Glibenclami
Metformin
Glimepiride+Metformin
Metformin+Voglibose
Glipizide+Metformin
Gliciazide+Metformin
Glimepiride+Metformin
Glibenclamide
Glimepiride+Pioglitazone+ Metaformin
Pioglitazone
Metformin+Pioglitazone
Glimepiride+Pioglitazone+Metaformin
Metformin Pioglitazone
Glimepiride+Pioglitazone
Melformin+ Rosiglitazone
Glimepiride
Gliclazide
Glipizide
Gliciazide+Pioglitazone
Acarbose
Voglibose
Miglitol
Sitagliptin
Metformin+Sitagliptin
Vildagliptin
Metformin+Vildagliptin
Mecobalami
Gymnema
Repaglinide
Nateglinide
Metformin+Nateglinide
Exenatide
Exenatide
Exenatide LAR
Liraglutide
Lixisenatide

Taspoglutide
Albiglutide
LY-2189265
Alogliptin
Saxagliptin
Linagliptin
Glycomet-Gp
Duotrol
Glycomet
Glucored
Gemer
Volibo-M
Glipimet
Glyciphage
Claz-M
Diabetrol
Gluformin
Glurib-M
Metica
Glizid-M
Metlong
Biotec
Triglucored Forte
Gemer-P
Pioglit
Pioglit-Mf
Triclazone
Pioz
Pioz-MfG
Pioz-Mf
Triglycomet
Pioz-G
Tripride
Rgm
Pionorm
Pionorm-M
Rosinorm-M
Tribet
Diabetrol-3D

Piozone
Piozone-M
Piozone-G
Pioglar
PioglarG
RiometTrio
Piocon-Forte
Amaryl
Daonil
Glimy
Reelide
Gp
Glynase Usv
Semi-Glynase
Glycor
Glycor-C
Diamicron
Glimer
Euglucon
Semi-Euglucon
Codica
Glucobay
Volix
Mierva
Volibo
Rebose
Mignar
Glucar
Vocarb
Misobit
Vobit
Januvia
Janumet
Galvus
Eucreas
Jalra
Jalra-M
Nervup
Rejunuron

Hyponidd
Rejunex Plus
Rejunex
Diabecon
Meshashringi
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