India is the **second diabetes capital of the world after China**, with the **treatment market growing** at a double-digit year-on-year growth rate, presenting both domestic and Multinational Companies (MNCs) with promising opportunities, states a new report by healthcare experts GBI Research.

Diabetes represents a group of metabolic diseases, characterized by hyperglycemia resulting from defects in insulin secretion or action, and associated with damage, dysfunction, and failure of various organs including the eyes, kidneys, nerves, heart and blood vessels. Increased disease awareness and compliance with treatment is hoped to restrain disease prevalence in India, but sedentary lifestyles, the adoption of Westernized culture, and longer lifespans are raising the prevalence of type 2 diabetes, or acquired diabetes, in the country. India's 2011 diabetic population was approximately 61.3 million, but is set to increase at an alarming rate, with an estimate by the International Diabetes Federation placing the Indian diabetic population at around 101 million by 2030.

India offers lucrative opportunities to both domestic and foreign pharmaceutical players with anti-diabetic product portfolios. In 2011, type 2 diabetes therapeutics dominated the anti-diabetic therapeutics market with an 87% share in value, and accordingly, more than 90% of all R&D pipeline molecules are being studied for the treatment of type 2 diabetes. The type 2 diabetes therapeutics market, although crowded with generics, is being viewed as a significant growth opportunity for newly patent-protected products, owing to high disease prevalence and considerable unmet need.

The R&D product pipeline for diabetes, dominated by Oral Anti-Diabetic (OAD) agents, consists of 194 molecules at various stages of clinical development, the majority being in Phase III trials. The launch of some of these pipeline molecules is anticipated to improve treatment and compliance rates and drive the anti-diabetic market in the forecast period.

Many MNCs are engaged in setting up strategic marketing and distribution agreements with domestic players, in order to improve their patient base and market share in India. Sun Pharma and Merck's joint venture to bring new anti-diabetics to emerging markets, the USV-Novartis collaboration for the marketing of Galvus, the Lupin-Eli Lilly alliance for the marketing of insulin, and collaborations between Eli Lilly and Boehringer Ingelheim all represent examples of this. MNCs succeed in expanding their patient base, while domestic companies benefit from the pharma giants' strong sales forces and manufacturing capabilities. Given the impressive growth

rate predicted for the diabetes therapeutics market in India, more strategic consolidations are expected to follow during the forecast period.

GBI Research's analysis values the Indian anti-diabetes market in 2011 at $680.3m, and predicts growth at a Compound Annual Growth Rate (CAGR) of 11.3% to reach a value of US$1,446m in 2018, due to the large and growing diabetes population in the country and anticipated launch of many first-in-class and novel molecules during the forecast period.

However, low treatment-seeking and diagnosis rates, poor compliance to medical care, rising healthcare costs and an increasingly competitive market are some of the key hurdles for India's domestic diabetes market.

* ***Diabetes Therapeutics Market in India to 2018 - Rapid Uptake of DPP-IV Inhibitors, GLP-1 Agonists and Expanding Insulin Segment to Drive Growth***