
Renub Research
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About the Report

The Renub Research report titled “The World Diabetes Market, 2007-2025: An analysis of Diabetes Drug and Insulin Market” gives a detailed analysis on the global diabetes market. This report investigates the top 10 countries: diabetes prevalence, diabetes drug market and insulin market. It also provides a description of the sales and market share of top 10 brands in anti-obesity drug and diabetes drug market globally. This report talks about the prevalence of Impaired Glucose Tolerance (IGT) globally, 20 countries annual health expenditure on diabetes, death due to type 1 and type 2 diabetes globally.

Market Overview

In recent year’s diabetes drug market and insulin market has shown remarkable growth. This growth is mostly driven by increasing prevalence of diabetes globally and easily availability of insulin in other countries due to its access at an affordable price. The diabetes prevalence is increasing due to changing food habits in the western world leading to obesity.

As the prevalence of obesity and related diseases (diabetes) has increased, so have the sales of drugs to treat them. Top 9 brands of anti-obesity drugs have done sales of more than US$ 100 Million by November 2007 to October 2008. Whereas, top 8 diabetes drug made a sale of more than US$ 5 Billion from the period of October 2007 to October 2008.

Although the works are going on to make the oral-pills an alternative for insulin but at present none of the systems have mimics the physiology of insulin secretion. So it is expected that insulin market will keep on growing to reach US$ 15 Billion by 2012. In future Insulin demand will be driven by countries such as US, China, India, Brazil, Russia and Germany.

Countries Analyzed

World Top 10 diabetic populace countries performances on: diabetes prevalence, diabetes drugs market and insulin market (their past, present and future forecast) have been analyzed in this report. The countries covered in this report are as follows: United States (US), China, India, Brazil, Russia, Germany, Pakistan, Mexico, Egypt and Japan.
Research Highlights

- By 2025 it is expected that India, China and US will be the first, second and third most diabetic populace country.
- In 2005 use of Non-U100 insulin was very popular in India, Ukraine and Egypt its use was more than 50 percent.
- Anti-obesity drug Meridia and Phentermine Hcl combined corner a market share of more than 65 percent globally from the period of November 2007 to October 2008.
- Anti-diabetic drug Actos (product of Takeda) control the highest market share of 40.5 percent globally from the period of October 2007 to October 2008.
- Diabetes drug Actos sale was highest it was more than twice the sale of its nearest competitor Januvia for the period of October 2007 to October 2008.
- Indian diabetic drug market is expected to be more than Rs. 3,200 Crore by 2010.
- Human insulin market in India has been increased to 30 percent in 2007 compared to 25 percent in 2003.
- In India delivery of insulin using cartridges and pen systems is less than 20 percent but it is growing by 35 percent annually.
- China insulin and analogue market grow by 55.8 percent in the year 2007 compared to 2006.
- Russia insulin market is expected to cross the mark of US$ 600 Million by 2010.
- In 2004 Mexico insulin market was just 1 percent of its total pharmaceutical market.

Key Players

Novo Nordisk A/S, Sanofi-Aventis, Takeda Pharmaceutical Company Limited, GlaxoSmithKline plc, Servier, Bayer AG, Merck & Co., Eli Lilly and Company, Amylin Pharmaceuticals, Inc., Merck KGaA

Data Sources

The information has been collected from various printable and non-printable sources like Magazines, Newspapers, Trade Journals, White papers, Online paid databases, News websites Government Agencies and Trade associations.
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2.3.1 People with Diabetes

India, with 40.9 Million people, lead the global top 10 countries in terms of the highest diabetic population in 2007, followed by China with 39.8 Million. The series is followed in descending order by USA, Russia, Germany, Japan Pakistan, Brazil, Mexico and Egypt. Developing countries account for seven of the world’s top ten countries with maximum diabetic population.

However in 2025 also the top three positions are expected to remain unchanged with India (69.9 Million), China (59.3 Million) and USA (25.4 Million) of diabetic population. With so high expected diabetic population in both the countries India and China have to inure huge expenditure on health in future.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Country</th>
<th>Persons (in Millions, 2007)</th>
<th>Rank</th>
<th>Country</th>
<th>Persons (in Millions, 2025)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>India</td>
<td>40.9</td>
<td>1</td>
<td>India</td>
<td>69.9</td>
</tr>
<tr>
<td>2</td>
<td>China</td>
<td>39.8</td>
<td>2</td>
<td>China</td>
<td>59.3</td>
</tr>
<tr>
<td>3</td>
<td>US</td>
<td>19.2</td>
<td>3</td>
<td>US</td>
<td>25.4</td>
</tr>
<tr>
<td>4</td>
<td>Russia</td>
<td>9.6</td>
<td>4</td>
<td>Brazil</td>
<td>17.6</td>
</tr>
<tr>
<td>5</td>
<td>Germany</td>
<td>7.4</td>
<td>5</td>
<td>Pakistan</td>
<td>11.5</td>
</tr>
<tr>
<td>6</td>
<td>Japan</td>
<td>7</td>
<td>6</td>
<td>Mexico</td>
<td>10.8</td>
</tr>
<tr>
<td>7</td>
<td>Pakistan</td>
<td>6.9</td>
<td>7</td>
<td>Russia</td>
<td>10.3</td>
</tr>
<tr>
<td>8</td>
<td>Brazil</td>
<td>6.9</td>
<td>8</td>
<td>Germany</td>
<td>8.1</td>
</tr>
<tr>
<td>9</td>
<td>Mexico</td>
<td>6.1</td>
<td>9</td>
<td>Egypt</td>
<td>7.6</td>
</tr>
<tr>
<td>10</td>
<td>Egypt</td>
<td>4.4</td>
<td></td>
<td>Bangladesh</td>
<td>7.4</td>
</tr>
</tbody>
</table>

Table 3-1: Global - Top 10 Countries Number of People with Diabetes (20-79 age group) (in Millions) 2007 & 2025

2.3.4 Death Due to Diabetes

Each year, over three million deaths are tied directly to diabetes. An even greater number die from cardiovascular disease made worse by diabetes-related lipid disorders and
hypertension. In 2007 South East Asian Region and Western Pacific has the highest number of deaths in females (approximately 580 Thousands) and males (approximately 550 Thousands) respectively.

**Figure 3-1: Global - By Region Number of Deaths attributable to Diabetes (20-79 age group) (in Millions) 2007**

<table>
<thead>
<tr>
<th>Region</th>
<th>Number of Deaths (Males)</th>
<th>Number of Deaths (Females)</th>
</tr>
</thead>
<tbody>
<tr>
<td>AFR</td>
<td>100,000</td>
<td>200,000</td>
</tr>
<tr>
<td>EMME</td>
<td>300,000</td>
<td>400,000</td>
</tr>
<tr>
<td>EUR</td>
<td>500,000</td>
<td>600,000</td>
</tr>
<tr>
<td>NA</td>
<td>700,000</td>
<td>800,000</td>
</tr>
<tr>
<td>SACA</td>
<td>900,000</td>
<td>1,000,000</td>
</tr>
<tr>
<td>SEA</td>
<td>1,100,000</td>
<td>1,200,000</td>
</tr>
<tr>
<td>WP</td>
<td>1,300,000</td>
<td>1,400,000</td>
</tr>
</tbody>
</table>

**Note:** AFR - Africa, EMME - Middle East & North Africa, EUR - Europe, NA - North America, SACA - South & Central America, SEA - South-East Asia, WP - Western Pacific

### 2.4 Diabetes and Obesity Interlinked

#### 2.4.1 Global Top 9 Anti-obesity (systemic) Brand Sales & Market Share

As obesity and related diseases have increased, so have prescriptions and sales of drugs to treat them. Weight-loss drugs with many of the top treatments experiencing sharp declines between 2003 and 2008. The top seller of the class, Abbott’s Meridia (sibutramine hydrochloride monohydrate), had US$36.7 Million in sales during the 12 months ended October 2008, an 18 percent decline from US$52.3 Million in 2007. At that time, Meridia
commanded 38.5 percent of the market share, but had 33.7 percent by October 2008. Pfizer’s Didrex (benzphetamine hydrochloride) had the biggest loss, declining by 39 percent to US$ 5.3 Million, as sales of generic competitors increased by nearly 80 percent.

New obesity drugs might give the market a boost. Phase II studies of the drug tesofensine found that it might be able to produce weight loss twice that of currently approved drugs. Amylin Pharmaceuticals also has sought to resurrect the protein leptin as a treatment for obesity in combination with the diabetes drug Symlin (pramlintide acetate). Wyeth Pharmaceuticals also acquired British biotech Thiakis, which is developing TKS1225, a synthetic version of gastrointestinal peptide oxyntomodulin for treating obesity and other comorbidities.

Table 3-2: Global - Top 9 Anti-obesity (systemic) Brand Sales (in Millions), Market Share & Percentage Change, November 2007 to October 2008

<table>
<thead>
<tr>
<th>Brand</th>
<th>Sales</th>
<th>Market Share (in Percent)</th>
<th>Percentage Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meridia</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phentermine Hcl</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adipex-P</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Diethylpropion Hcl</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phendimetrazin Tar</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Didrex</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Benzphetamine Hcl</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bontril Slow-Re</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bontril Pdm</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
3 Global Market Analysis

3.1 Global Diabetes Prevalence

Diabetic population is growing around the world at an alarming rate. In 2007, Diabetes affected 246 Million people globally and is expected to affect some 380 Million by 2025. In terms of comparative prevalence diabetes patients in 2007 was 6 percent which is expected to rise to 7.3 percent by the year 2025.

Table 3-1: Global - Number of People with Diabetes & Prevalence (20-79 age group) (in Millions & Percent) 2007 & 2025

<table>
<thead>
<tr>
<th></th>
<th>2007</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comparative prevalence (in Percent)</td>
<td>6.0</td>
<td>7.3</td>
</tr>
<tr>
<td>Number of people with diabetes (in Millions)</td>
<td>246</td>
<td>380</td>
</tr>
</tbody>
</table>

3.1.1 Global Top 10 Diabetes (Non-Insulin) Company, Brand Sales & Market Share

From October 2007 to October 2008 the top-selling diabetes drug, Takeda’s insulin sensitizer Actos (pioglitazone hydrochloride), had sales of US$ 2.5 Billion. In this phase only new classes of diabetes drugs also have appeared on the market. These include such DPP-4 inhibitors as Merck & Co.’s Januvia (sitagliptin), and such incretin mimetics as Byetta (exenatide) by Eli Lilly and Amylin Pharmaceuticals. Sales of Actos still dwarf both drugs, with Byetta having sales of US$ 561.4 Million and Januvia sales of US$ 946.1 Million.

Still, studies have shown the two drugs to be highly effective in controlling diabetes, but Byetta, which had sales of US$ 650.2 Million last year, has not been lucky. The Food and Drug Administration recently rejected an application by Amylin Pharmaceuticals and Alkermes for approval of a longer-acting version of Byetta.

A drug that Novo Nordisk is investigating as a diabetes treatment, liraglutide, was found to be more effective than both Byetta and Januvia in a study presented in October 2008 at a meeting of the Canadian Diabetes Association and the Canadian Society of Endocrinology.
Table 3-2: Global - Top 8 Diabetes (Non-Insulin) Brand Sales (in Millions), Market Share & Percentage Change, October 2007 - October 2008

<table>
<thead>
<tr>
<th>Brand</th>
<th>Sales (in Millions)</th>
<th>Market Share (in Percent)</th>
<th>Percentage Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actos</td>
<td>2,592.10</td>
<td>40.5</td>
<td>8.0</td>
</tr>
<tr>
<td>Januvia</td>
<td>946.1</td>
<td>14.6</td>
<td>106.0</td>
</tr>
<tr>
<td>Byetta</td>
<td>561.4</td>
<td>8.8</td>
<td>13.0</td>
</tr>
<tr>
<td>Avandia</td>
<td>545.2</td>
<td>8.5</td>
<td>-58.0</td>
</tr>
<tr>
<td>Avandamet</td>
<td>198.1</td>
<td>3.1</td>
<td>-33.0</td>
</tr>
<tr>
<td>Prandin</td>
<td>153.9</td>
<td>2.4</td>
<td>15.0</td>
</tr>
<tr>
<td>Metformin Hcl</td>
<td>122.5</td>
<td>1.9</td>
<td>-30.0</td>
</tr>
<tr>
<td>Starlix</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>


3.2 Global Insulin Market (Past, Present & Future Scenario)

3.2.1 By Region - Types of Insulin Uses

Analogue insulin was commonly used in most countries in Western Europe, the USA and Canada, Jordan, Kuwait and Lebanon, and some South American and Western Pacific countries. Its use was generally much lower (or absent) in poorer countries presumably due to price issues. Analogue insulin’s have not yet been approved for use in all countries. Premix insulin was most commonly used in the African, Eastern Mediterranean and Middle Eastern, and South-East Asian regions, and some countries in the Western Pacific region.
Figure 3-1: Global - By Region Usage of Types of Insulin (Rapid-and fast-acting, Long-and intermediate-acting, Premix, Analogue, U100, Animal), (in Percent), 2005

Note: AFR - Africa, EMME - Middle East & North Africa, EUR - Europe, NA - North America, SACA - South & Central America, SEA - South East Asia, WP - Western Pacific
4 Top 10 Countries Performance

4.2 China

4.2.1 Diabetes Prevalence (Past, Present & Future Scenario)

In 2003 China was having 23.8 Million diabetic patients which have increased to 39.8 Million by the end of 2007. The diabetic patients in China have grown with a CAGR of 13.72 percent for the period of 2003 to 2007.

![Figure 4-1: China - Number of Diabetes Patients (in Million), 2003 - 2007](image)

4.2.2 Diabetes Drug Market (Past, Present & Future Scenario)

China diabetes drug has reached Yuan 7,495 Million in 2007, an increase of 20.98 per cent than 2006, which was Yuan 6,195 Million. The Chinese drug market is expected to grow with a CAGR of 20.98 percent for the period of 2006 to 2010.
Figure 4-2: China - Anti-diabetic Drug Market (in Million Yuan), 2006 - 2007

<table>
<thead>
<tr>
<th>Year</th>
<th>Sales (in Million Yuan)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>6,195</td>
</tr>
<tr>
<td>2007</td>
<td>7,495</td>
</tr>
</tbody>
</table>

Source: Business Wire, Forbes

Figure 4-3: China - Forecast for Anti-diabetic Drug Market (in Million Yuan), 2008 - 2010

<table>
<thead>
<tr>
<th>Year</th>
<th>Sales (in Million Yuan)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>9067.5</td>
</tr>
<tr>
<td>2009</td>
<td>10,970</td>
</tr>
<tr>
<td>2010</td>
<td>13,271.3</td>
</tr>
</tbody>
</table>

Source: Business Wire, Forbes, Renub Research
4.3 India

4.3.1 Diabetes Prevalence (Past, Present & Future Scenario)

In 2008 also India will continue to be the country with highest number of people having diabetic population globally and it is expected to be 69.9 Million by 2025. Such a huge number of diabetic populations will lead to growth in diabetes medicines such as insulin it will be fuelled by increased access to health insurance, greater patient spending power and more aggressive treatment practice.

Table 4-1: India - Forecast for Number of Diagnosed Diabetes Patients (in Million), 2008 - 2025

<table>
<thead>
<tr>
<th>Year</th>
<th>Diabetic Patients (in Million)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>42.14</td>
</tr>
<tr>
<td>2009</td>
<td>43.41</td>
</tr>
<tr>
<td>2010</td>
<td>44.72</td>
</tr>
<tr>
<td>2011</td>
<td>46.07</td>
</tr>
<tr>
<td>2012</td>
<td>47.46</td>
</tr>
<tr>
<td>2013</td>
<td>48.89</td>
</tr>
<tr>
<td>2014</td>
<td>50.37</td>
</tr>
<tr>
<td>2015</td>
<td>51.89</td>
</tr>
<tr>
<td>2016</td>
<td>53.46</td>
</tr>
<tr>
<td>2017</td>
<td>55.07</td>
</tr>
<tr>
<td>2018</td>
<td>56.74</td>
</tr>
<tr>
<td>2019</td>
<td>58.45</td>
</tr>
<tr>
<td>2020</td>
<td>60.21</td>
</tr>
<tr>
<td>2021</td>
<td>62.03</td>
</tr>
<tr>
<td>2022</td>
<td>63.91</td>
</tr>
<tr>
<td>2023</td>
<td>65.84</td>
</tr>
<tr>
<td>2024</td>
<td>67.82</td>
</tr>
<tr>
<td>2025</td>
<td>69.87</td>
</tr>
</tbody>
</table>


4.3.2 Insulin Market (Past, Present & Future Scenario)

The Indian insulin market is pegged at Rs 517.9 Crore in 2007 compared to Rs 400 Crore in 2006. The insulin industry of India is expected to increase by 22 percent in the year 2008 and further by 25 per cent in the coming two years (2009 and 2010), with the launch and
introduction of newer and effective molecules. The growth percent in 2008 will be lower compared to next two years due to global slowdown.

Figure 4-4: India - Insulin Market (in Crore Rs), 2003 - 2007

![Graph showing the India Insulin Market (in Crore Rs) from 2003 to 2007. The sources mentioned are Biospectrum, Financial Express, Business Line, Business Standard.](image)
Figure 4-5: India - Forecast for Insulin Market (in Crore Rs), 2008 - 2010

- **2008**: 631.8 Crore Rs.
- **2009**: 789.8 Crore Rs.
- **2010**: 987.2 Crore Rs.

Source: Biospectrum, Financial Express, Business Line, Business Standard
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