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Cardiac volumes rise 9.1% as key pharma subsegments gain momentum in Sept 2026

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Monoclonal antibodies remained the largest contributing category within the segment



The cardiac segment recorded volume growth of 9.1 per cent in September 2026, followed by the nutritional segment at around 5 per cent, while selected subsegments across chronic therapies also registered stronger demand. Within cardiac therapies, lipid-lowering drugs, platelet aggregation inhibitors, diuretics and heart-failure therapies reported relatively higher volume-driven growth than antihypertensives. These trends contributed to an improvement in medicine demand, with overall volume-driven growth in the Indian Pharmaceutical Market (IPM) reaching around 3.4 per cent, according to data from Pharmarack Technologies.

Sharing insights on the market, Sheetal Sapale, Vice President – Commercial at Pharmarack Technologies, said September recorded one of the strongest levels of volume-driven growth seen in recent months. The last comparable increase was in June, when volume-driven growth stood at around 3.3 per cent.

“Demand has been on the higher side” across most therapy areas, Sheetal Sapale noted, pointing to stronger performance in several mature therapy segments as well as selected newer product categories.

Cardiac therapies show broad-based demand

Within the cardiac segment, antihypertensives—which account for approximately 50 per cent of the segment—recorded relatively moderate volume growth. In contrast, lipid-lowering therapies, platelet aggregation inhibitors, diuretics and heart-failure therapies registered stronger volume-driven growth.

According to Sheetal Sapale, the trend may reflect improvements in the identification, diagnosis and treatment of lifestyle-related diseases. Greater awareness and testing are also bringing younger populations into treatment for conditions such as hypertension, which has traditionally been associated more closely with ageing.

The nutritional segment recorded stable volume growth of around 5 per cent. Although growth was not at double-digit levels, the segment continued to contribute to the market's broader volume expansion.

Seasonal changes affect anti-infective and gastro therapies

The anti-infective segment showed a shift in demand patterns as the monsoon began to recede across several states. Antibacterial and antifungal categories, which typically benefit from monsoon-related demand, recorded declines in volume growth. Antivirals, however, showed relatively higher volume-driven growth.

In the gastro segment, digestive enzymes emerged as a relatively stronger category during the post-monsoon period, while other categories registered more moderate growth.

Pain and analgesics recorded modest volume-driven growth. Sheetal Sapale linked this performance partly to softer volume growth in associated cough-and-cold and anti-infective medicines, with which pain and analgesic products are often prescribed.

In respiratory therapies, almost all major categories showed healthy volume-driven growth. However, anti-asthma and chronic obstructive pulmonary disease (COPD) products were expected to gain further momentum as winter approached. According to Sheetal Sapale, November to February is typically a stronger period for these therapies because of seasonal exacerbations of respiratory conditions.

Diabetes growth moderates, but OAD combinations remain stable

The diabetes segment recorded a moderation in overall volume growth. However, oral anti-diabetic (OAD) combinations, a relatively large and established category, continued to show stable volume growth of around 4 per cent.

New product introductions also performed well within OAD combinations, indicating that growth was being supported by both established treatments and newer medicines.

The glucagon-like peptide-1 (GLP-1) agonist market was another area of activity. Following the semaglutide patent expiry, generic products entered the market and contributed to the expansion of the segment, according to Pharmarack's assessment.

Chronic-care subsegments record stronger growth

Several categories within other chronic therapy areas also showed relatively higher volume-driven growth.

In the neuro/CNS segment, anti-epileptic, anti-Parkinson's and anti-Alzheimer's products were among the stronger-performing categories. Increased diagnosis, an ageing population and greater treatment uptake may be contributing to demand, although epilepsy spans multiple age groups.

In the hormones segment, thyroid hormones and anabolic agents were key contributors to volume growth. Almost all brands operating in the thyroid hormone category recorded higher volume growth, according to Sheetal Sapale. The gradual onset of thyroid-related symptoms can delay diagnosis, making greater awareness and testing important factors in identifying patients.

In gynaecology, the segment recorded overall growth of close to 18 per cent, with uterotonics—particularly mifepristone-misoprostol combinations—showing relatively higher volume-driven growth. Antithrombotic agents led volume growth within the blood-related segment.

The cosmoderm segment recorded stronger growth in hair-care and anti-acne products, while emollients could gain momentum with the onset of winter. In ophthalmology, aflibercept and ranibizumab were among the products showing relatively higher volume-driven growth. The urology segment also recorded decent volume growth across its major categories.

Antineoplastics see mixed volume trends

Within the antineoplastic segment, immunosuppressive and immunostimulating agents, protein kinase inhibitors and plant-based antineoplastics recorded stronger volume growth.

Monoclonal antibodies remained the largest contributing category within the segment, but their volume-driven growth was negative. New-product introductions continued to support the broader market, with biosimilars gaining acceptance partly because of more economical pricing and comparable efficacy, according to the Pharmarack assessment.

The vaccine segment, meanwhile, recorded relatively slow volume-driven growth, although new product introductions appeared to be supporting market performance.

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