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Expanding patient pool & increasing adoption of combination regimens supporting growth of anti-diabetes market: Pharmarack

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Insulin therapies remain a critical pillar of the market



The anti-diabetes segment continues to reinforce its strategic importance in the Indian Pharmaceutical Market (IPM), ranking as the fourth largest therapy area. For MAT December 2025, the segment recorded a market value of Rs 22,280 crore, delivering a value growth of 9 per cent, supported by an expanding patient pool, earlier initiation of therapy, and increasing adoption of combination regimens, according to Pharmarack Technologies report.

In her presentation on IPM market for MAT December 2025, Sheetal Sapale, Vice President – Commercial, Pharmarack Technologies said that the growth within the category is being driven primarily by oral anti-diabetic drug (OAD) combinations, which account for 57 per cent of the segment value. OAD combinations clocked Rs 12,608 crore in MAT December 2025, growing at 9 per cent, as fixed-dose combinations of SGLT2 inhibitors and DPP-4 inhibitors continue to gain traction. Despite several core molecules moving off-patent, these combinations have enabled sustained value expansion within traditional treatment pathways.

Insulin therapies remain a critical pillar of the market, contributing Rs 4,626 crore with a value growth of 4 per cent in MAT December 2025. While volume growth remains stable, price-led growth and incremental adoption in earlier stages of treatment continue to support the segment. In contrast, plain OADs, valued at Rs 3,825 crore, showed modest growth of 2 per cent, reflecting gradual maturity and substitution by combination therapies.

She further observed that a key structural shift underway within the segment is the formal emergence of obesity as a distinct therapeutic segment, closely linked to the rapid rise of GLP-1 agonists. Though currently accounting for only 5 per cent of anti-diabetes value, the GLP-1 agonist segment reached Rs 1,169 crore in MAT December 2025, posting a sharp value growth of 128 per cent. This acceleration has been driven by the launch of oral semaglutide in 2022, followed by injectable therapies, alongside heightened awareness of obesity as a chronic condition.

The market has also seen 15 new molecules and combinations launched over the last two years, including Tirzepatide, Empa+Sita, Dapa+Lina+Met, Insulin Glarg + Lixisenatide, Empa+Lina+Met, Empa+Sita+Met, Dapa+Pioglitazone, Dapa+Bisoprolol, Trelagliptin, Sita+Glicla, Dapa+Glicla, Sita+Glim, Dapa+Metoprolol, Dapa+Glicla+Met, Fast Acting Soluble/Neutral Insulin. While GLP-1 therapies remain premium with measured volumes, partnerships and price rationalisation have improved accessibility.

Looking ahead, Sheetal Sapale said “The category’s growth engine is clear—Anti-diabetes delivers scale without major innovation, while Anti-obesity delivers both innovation and volume.”