

# DIABETOLOGY INSIGHTS

Therapy trends

2021 - 2022



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A person wearing a blue shirt is using a glucometer to test their blood sugar. The background is a soft, out-of-focus image of the person's hands and the device. The overall color palette is dominated by shades of blue and purple.

There are

**~77,000,000**

cases of diabetes in India &  
the no. is estimated to cross

**109,000,000**

by 2035.

The prevalence of Diabetes has been increasing dramatically in India in recent years. There are **~77 million cases** of diabetes in India & the number is estimated to cross **109 million by 2035**. It is one of the leading causes of **kidney failure, lower-limb amputations and myocardial infarctions**. Additionally, people with diabetes have been shown to be at higher risk of psychosocial impacts such as major depressive disorder, general anxiety disorder & panic disorder compared to the general population.

The diabetes market has gone through significant changes over time in providing novel therapeutics for better management of this debilitating disorder. It includes **several drug classes like DPP4i<sup>1</sup>, SGLT2i<sup>2</sup>, generics as well as digitized medicine products like continuous glucose monitors**.

This report highlights the diabetes market, its key players & digital trends observed amongst diabetologists as well as upcoming advancements in diabetes space.

<sup>1</sup>Dipeptidyl Peptidase 4 inhibitors, <sup>2</sup>Sodium/glucose cotransporter-2 inhibitors



# DIABETES MARKET IN INDIA

# AN OVERVIEW

## INDIAN PHARMA MARKET (IPM)

Value  
INR **1,69,032 crore**

Growth rate  
**15.7%**

## INDIAN DIABETES MARKET

Value  
INR **15,866 crore**

Growth rate  
**9%**

## FORECAST OF INDIAN DIABETES MARKET

CAGR<sup>3</sup>  
**16.5%**  
Time period  
**2021 - 2036**

Anti-diabetes features in the **top 5** therapy areas of IPM & constitutes **9%** of market share

<sup>3</sup>Compound Annual Growth Rate

# KEY DIABETES INSTITUTE



Chellaram Diabetes Institute

National Diabetes, Obesity & Cholesterol foundation (N-DOC)

Indian Institute of Diabetes (IID)

Diabetes Foundation India

Diabetes Research Institute (DRI)

\*We are associated with many medical associations & institutes as knowledge partners. Connect with us if you want to know more.

# KEY DIABETES ASSOCIATIONS



Endocrine Society of India

Research Society for  
Study of Diabetes in India (RSSDI)

Association of Diabetes  
Educators (ADE)

Diabetes Association of India  
(ADI)

Diabetic Foot Society of India  
(DFSI)

# KEY DIABETES ASSOCIATIONS (INTERNATIONAL)



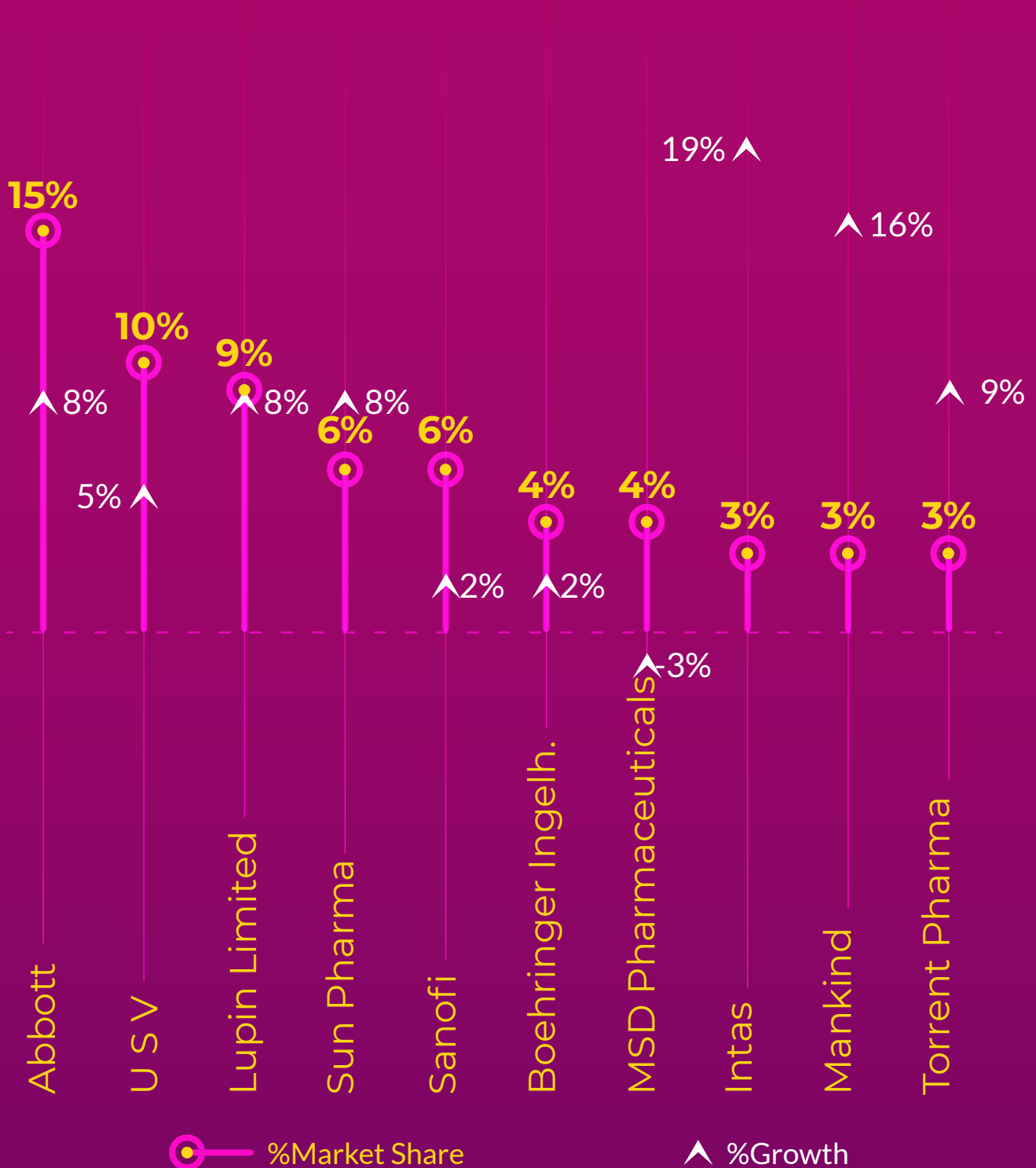
**International Diabetes Federation  
(IDF)**

**Asian Association for the Study  
of Diabetes (AASD)**

**American Diabetes Association  
(ADA)**

**Association of diabetes Care and  
Education Specialist**

# TOP 10 ANTI-DIABETIC COMPANIES



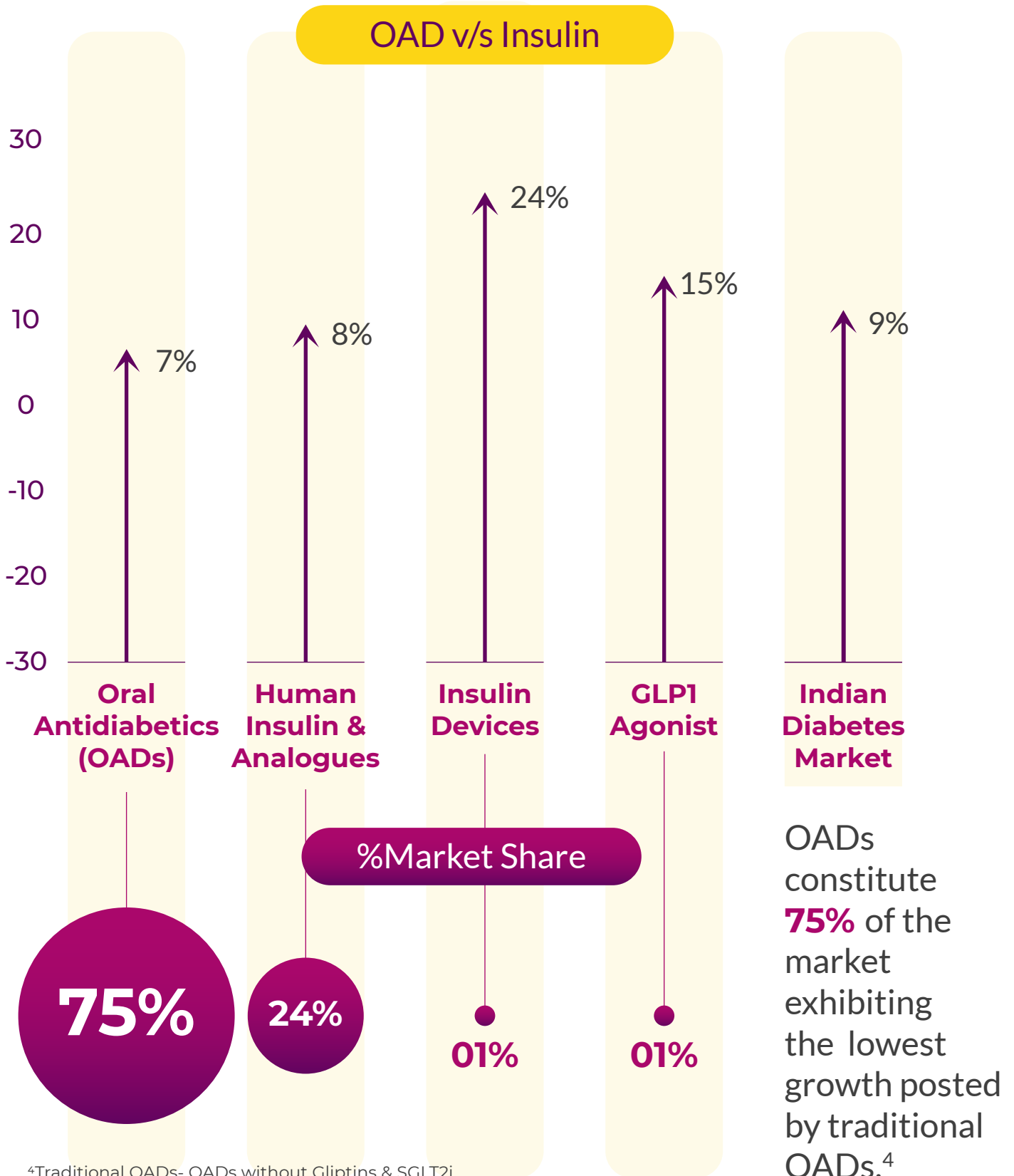
Top 10 companies constitute ~ **63% of share** of anti-diabetes market on MAT value Jan'22

Highest growth is posted by **Intas & Mankind** on MAT value Jan'22

Reference: IMS data Jan 2022

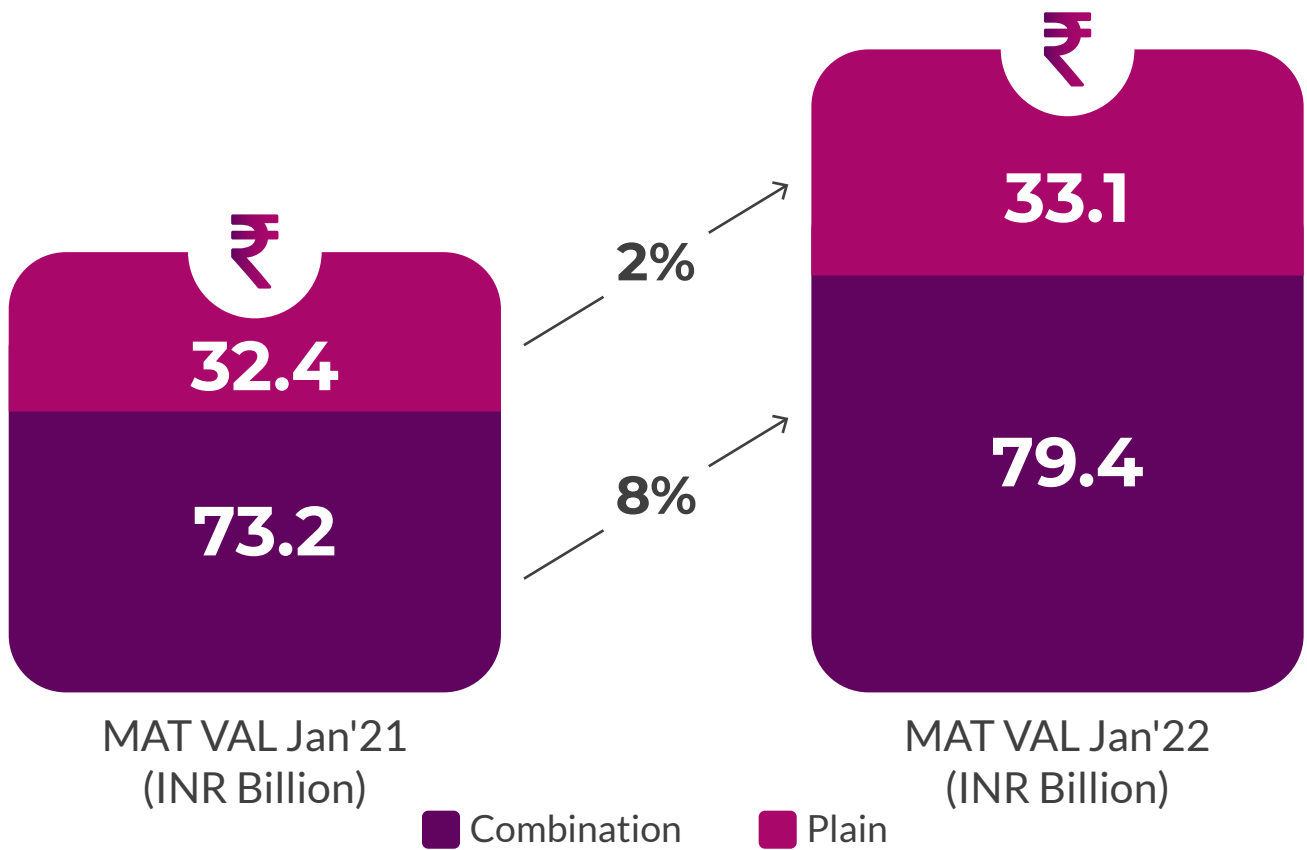
# HOW DRUG CLASSES ARE GROWING?

← %Growth  
 ● %Market Share

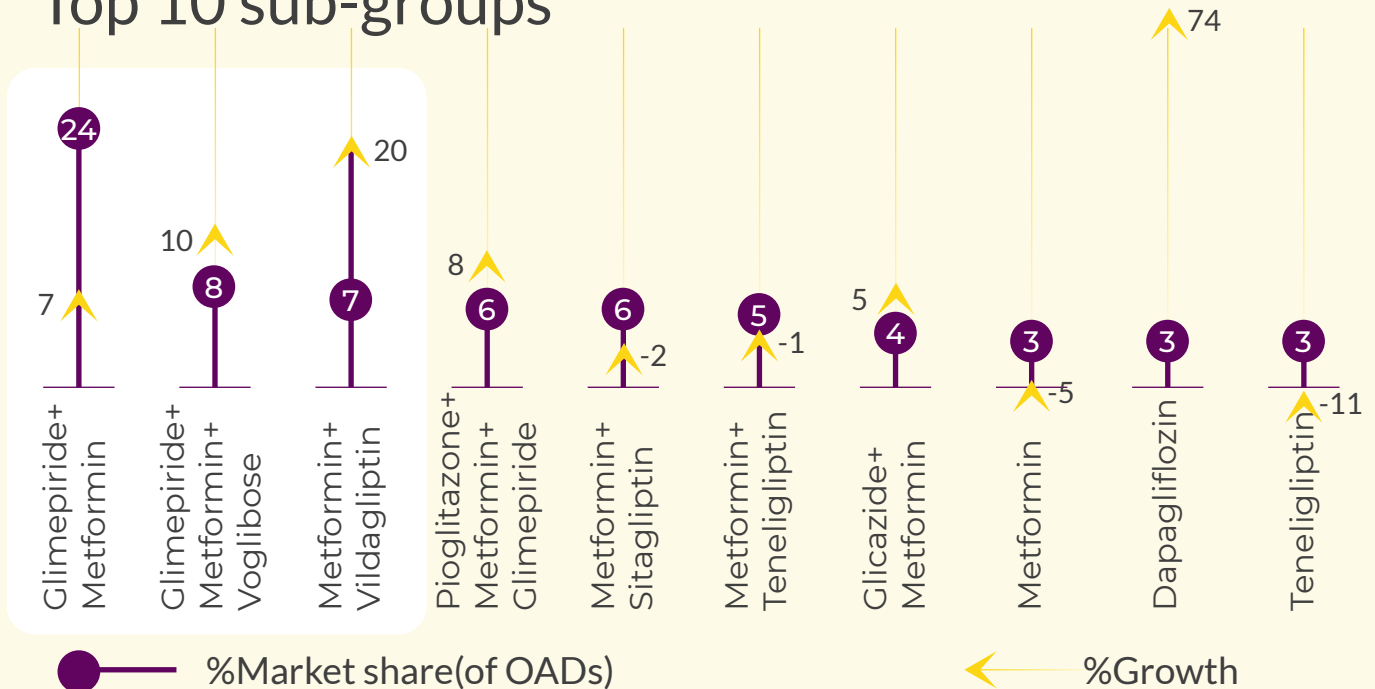


<sup>4</sup>Traditional OADs- OADs without Gliptins & SGLT2i  
 Reference: IMS data Jan 2022

# HOW DRUG CLASSES ARE GROWING? (Market Composition)



## Top 10 sub-groups



Reference: IMS data Jan'22

# KEY TAKEAWAYS | MARKET COMPOSITION

# 1

Taking into consideration the **MAT value & growth data**, it is observed that **OAD combinations** are preferred over plain molecules for better glycemic control.

# 2

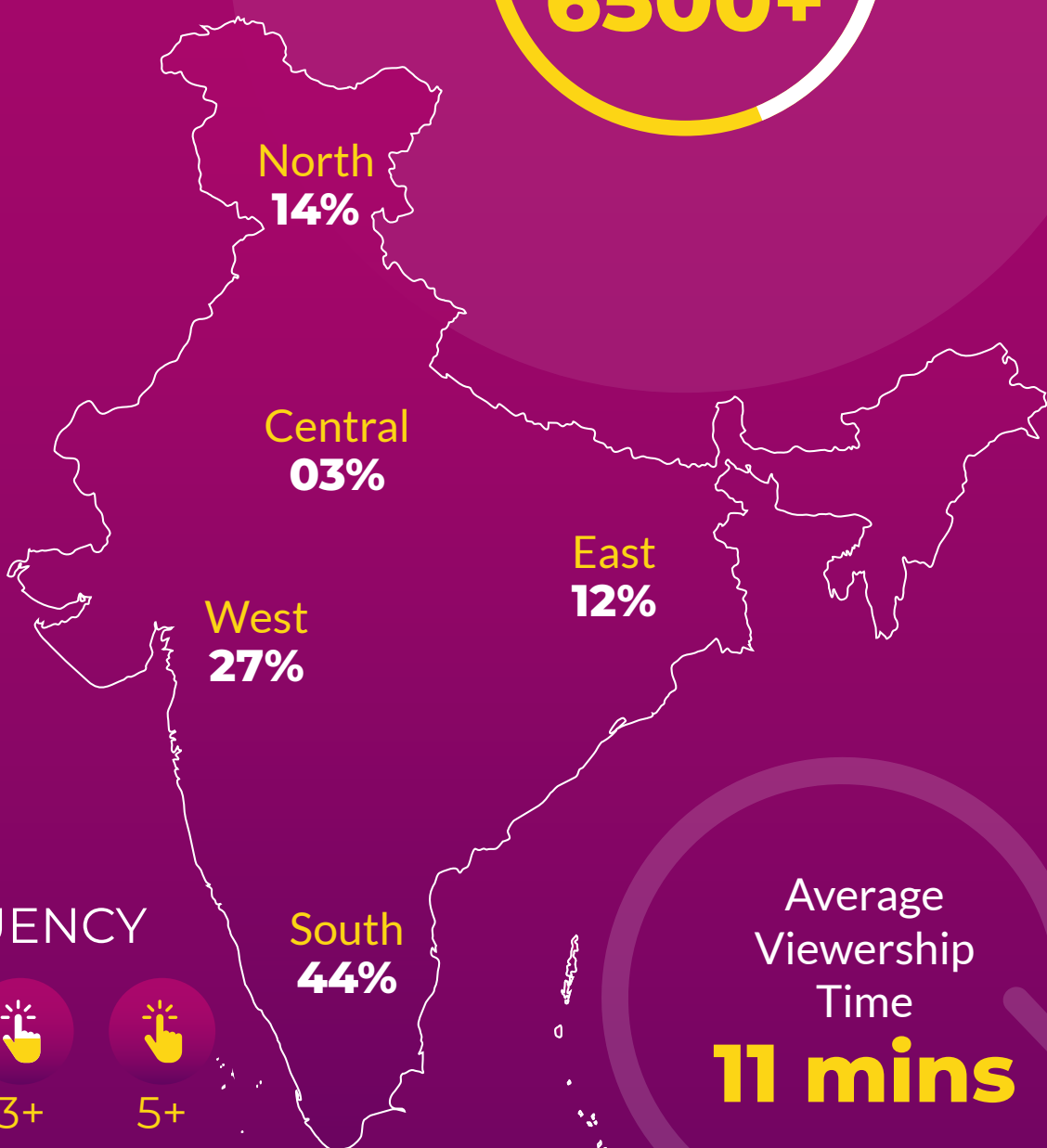
The top 3 OAD combinations are **Glimepiride+Metformin, Glimepiride+Metformin+Voglibose & Metformin+ Vildagliptin.**



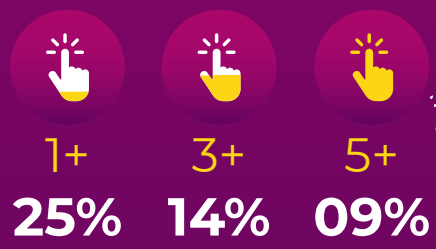
# RECENT E-TRENDS ON DOCPLEXUS

# DOCPLEXUS DIABETOLOGISTS UNIVERSE

Geographical spread & HCP\* activity



VISIT FREQUENCY



\*HCP- Healthcare Professionals

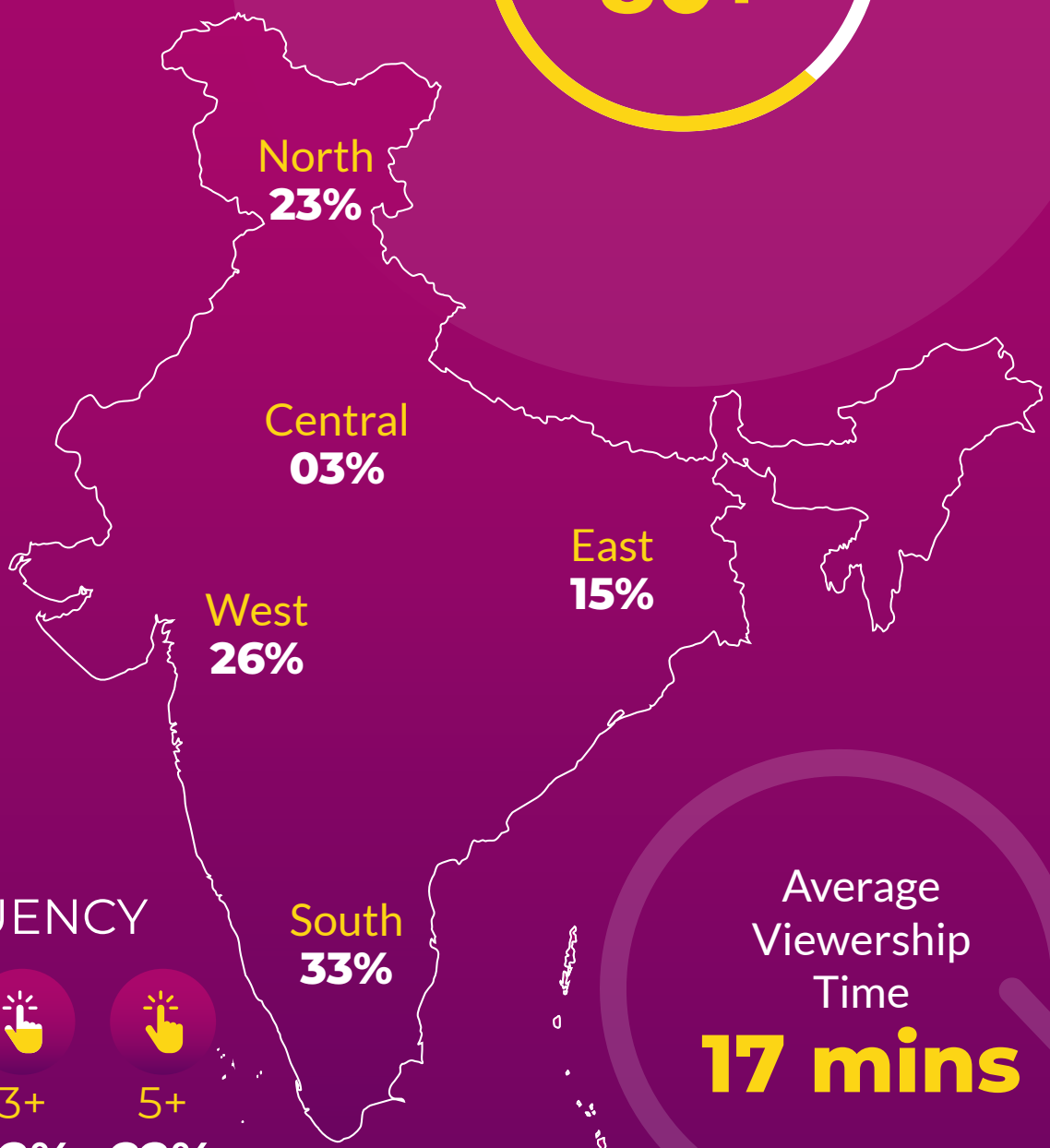
# DOCPLEXUS KOL# (DIABETES) UNIVERSE

Geographical spread &  
HCP activity

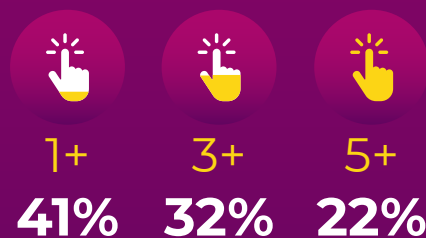
62%  
Metro

Total  
KOLs  
**80+**

38%  
Non-Metro



VISIT  
FREQUENCY

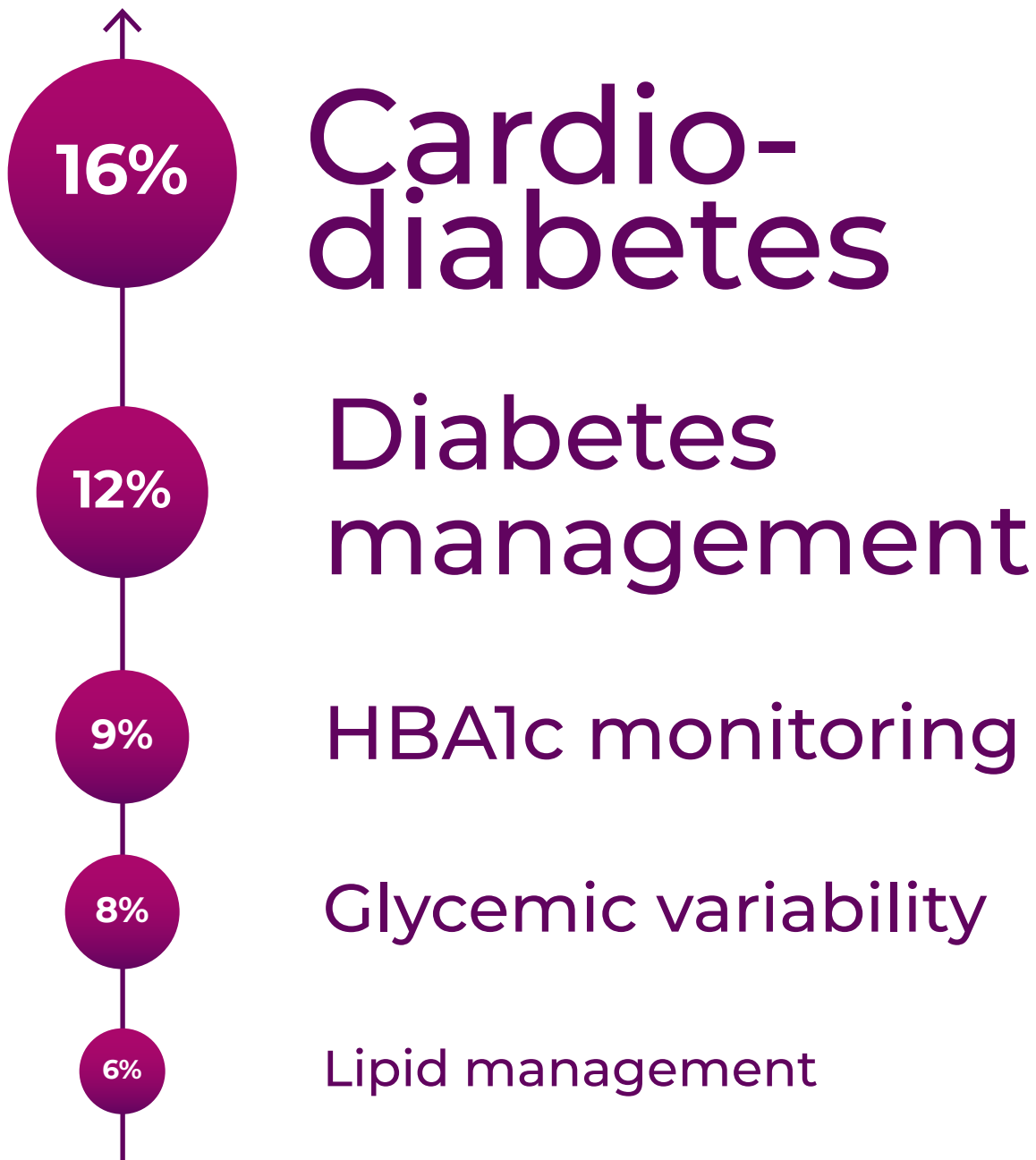


Average  
Viewership  
Time

**17 mins**

#KOL- Key Opinion Leader

## TOP KEYWORDS SEARCHED

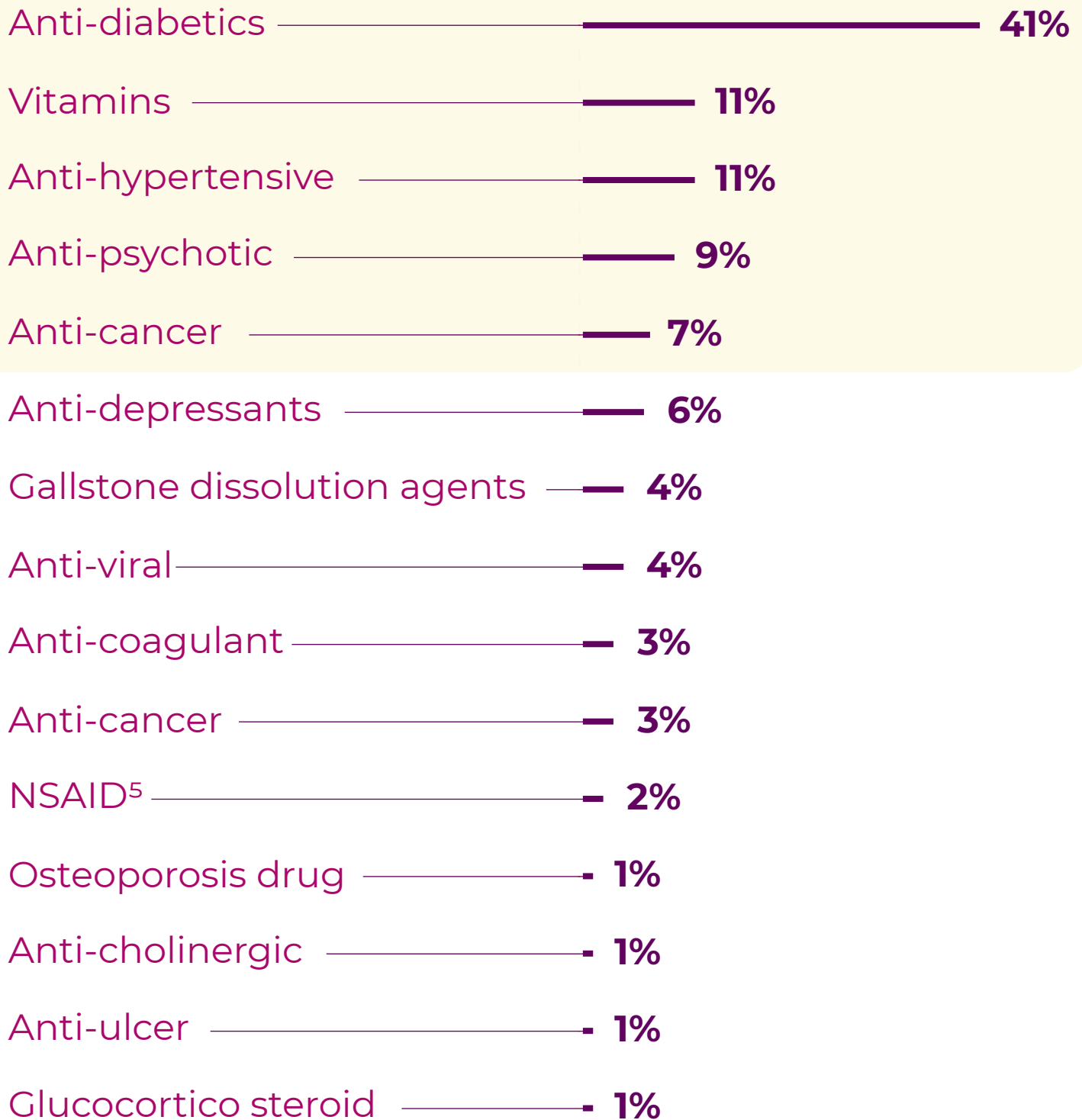


The title and content can have these keywords to align with HCPs search pattern on platform so that it gets more views from them.

# TRENDING DRUG CLASSES

Drug class

% Salience



<sup>5</sup>Non-steroidal anti-inflammatory drug

# TRENDING MOLECULES

Top anti-diabetic molecules featured in searches



Insulin

Dapagliflozin

Remogliflozin

Metformin

Linagliptin

Empagliflozin

Acarbose

# TRENDING BRANDS

Top anti-diabetic brands featured in searches



Lantus

Ryzodeg

Amaryl

Trulicity

Humalog

Jardiance

# KEY TAKEAWAYS | TRENDING DRUGS

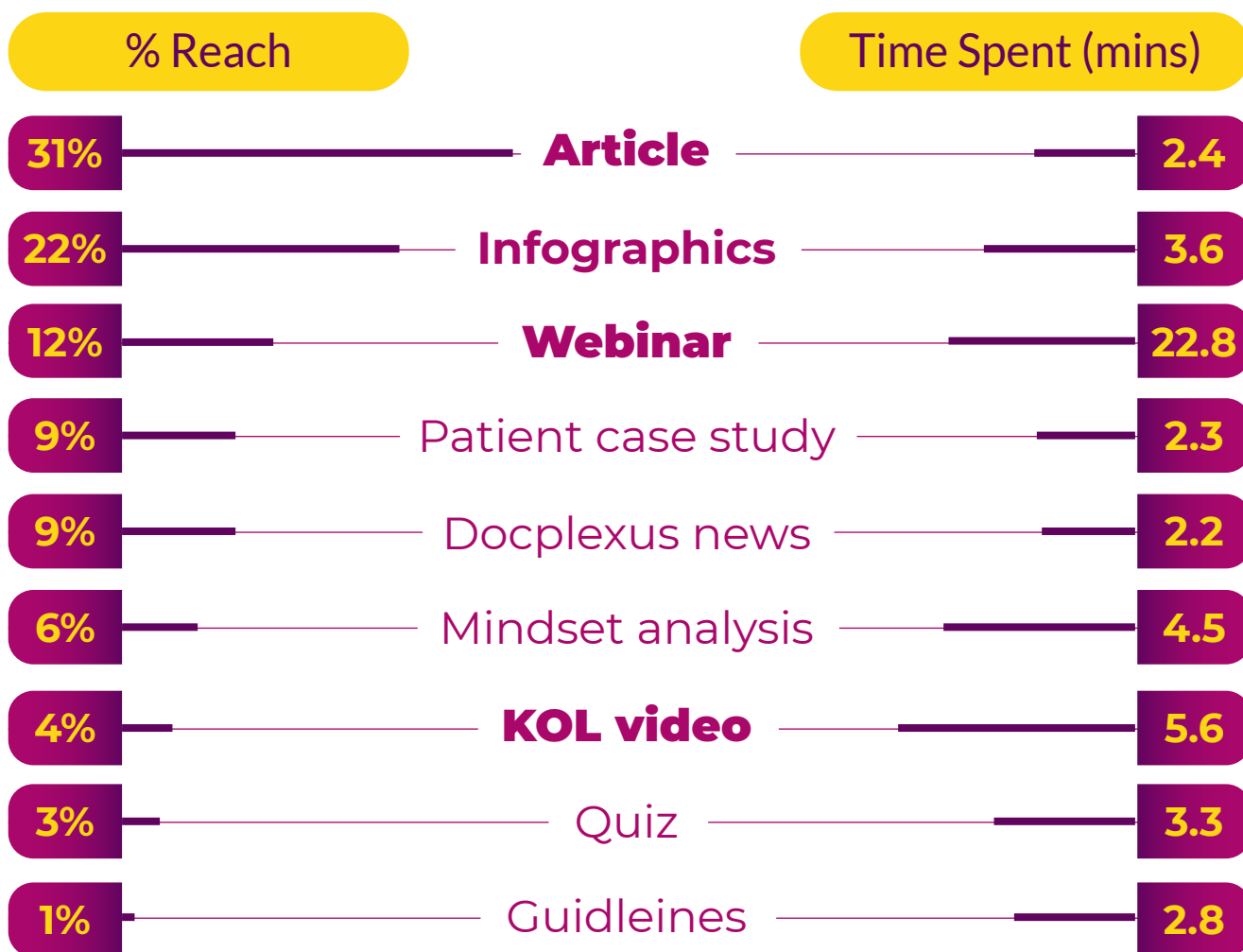
1

In addition to anti-diabetic molecules, HCPs are keen on other drug classes like **Vitamins, Anti-hypertensives & Anti-psychotics.**

2

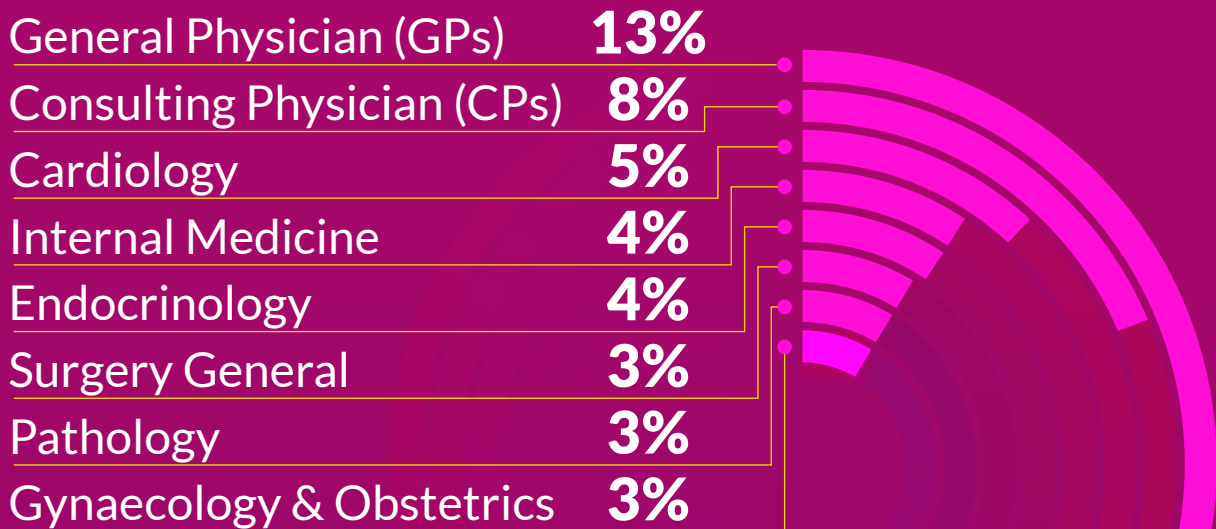
**Metformin, Acarbose** although being older molecules feature in the top searches by HCPs.

# WHAT ENGAGES HCPS THE MOST? (Content formats)



On the basis of % reach & time spent on respective content formats, **webinars, articles & KOL videos** are the most engaging content formats followed by **infographics**.

# WHICH OTHER SPECIALTIES ARE INTERESTED IN DIABETES CONTENT?



1

Apart from **GPs & CPs, Cardiologists, Endocrinology and Internal Medicine** Practitioners also consume diabetology related posts.

2

Targeting these specialties will further help in expanding the target HCP base.

# WHAT DID HCPs LIKE TO READ?

## Trending Topics

## Top 5 Case Studies



Recent guideline recommendations on Type 2 diabetes mellitus

Type 2 diabetes mellitus & related complications: Indian perspective

Real world evidence with Dulaglutide

Injectable choices for diabetic patients fasting during Ramadan

Combination therapy for diabetes: GLP1-RA<sup>7</sup> as add-on to SGLT-2<sup>2</sup> inhibitors

Once weekly GLP1 RA<sup>7</sup>: For whom and when?

A case discussion of Type 2 diabetes mellitus with heart failure

Case discussion: Managing CKD<sup>^</sup> complication in diabetes

A case study on diabetic macular edema with prominent choriogenin folds

Diabetic Mastopathy: An entity mimicking malignancy

<sup>2</sup>Sodium/glucose cotransporter-2 inhibitors, <sup>7</sup>Glucagon-like peptide-1 receptor agonists, <sup>^</sup>Chronic Kidney Disease

# WHAT DID HCPs READ THE MOST? (Articles)

## Top 5 Industry\* Articles

## Top 5 Community# Articles



DeFranzo's octet:  
Pathophysiology or  
strategies of prescribe???

An overview on  
diabetic macular edema

Cardiovascular safety  
of glimepiride:  
Strength of evidence

Accuracy of blood glucose  
monitoring systems  
for modern  
diabetes management

Integrated personalized  
diabetes management

Ambulatory glucose  
monitoring: Pros and Cons

Vildagliptin: An effective  
gliptin for achieving  
glycemic control in Type 2  
diabetes mellitus patients

Role of vitamin D for  
treating diabetes type 1  
& type 2 & dyslipidemia

360° control in newly  
diagnosed type 2  
diabetes patients

Digital therapeutics in  
diabetes management

\*Healthcare Industry Partners that we partner with for hosting their brand content on platform,  
#Editorial Content published on Platform

# WHAT DID HCPs DISCUSS THE MOST? (Webinars)

Top 5 Industry\* Webinars

Top 5 Community# Webinars



Immunity in diabetes:  
Role of nutrition

Metrics beyond HbA1c:  
The role of structured  
glucose monitoring

Approach to special  
population of Type 2  
diabetes mellitus with  
concentrated bolus insulin

Role of nutrition in  
diabetes management

Diabetes in Indians:  
Is the phenotype different?

Global Diabetes Summit  
2020: Learn from  
the experts from Asia &  
Latin America

Latest technologies  
in diabetes

Diabetes and technology-  
acquaintance to device  
and digital technology  
for diabetes care

Statins for all diabetics  
after 40: Yes / No

The Bermuda Triangle:  
Hypertension, diabetes  
mellitus, & nephropathy

# KEY TAKEAWAYS | TRENDING FOR HCPs

1

Diabetes care has entered a new era with **advances in insulins, digital medicine products & care management capabilities.**

2

Timeless topics like **diabetes associated co-morbidities** constitute majority of top topics across all the content formats.

# CLINICAL DIGEST

## This World Diabetes Day we hosted



**Global  
Diabetes**  
Summit 2021

12th, 13th & 14th Nov



IN ASSOCIATION WITH



**Powered by experts from  
Asia and Latin America**

Access to Diabetes Care



# OUR SPEAKERS



## Quality Education Program to Ensure Self-Care

Dr. Sanjay Kalra



## Barriers for Insulin Therapy

Dr. Joel Teelucksingh



## Metformin: Still the First Line of Therapy for T2DM?

Dr. Hemant Thaker



## New Oral Hypoglycemic Agents: Latest Developments and Alternative Treatments

Dr. A.G Unnikrishnan



## Latest Technologies for Glycemic Control

Dr. Banshi Saboo



## Bursting the Myth on Reversal of Diabetes

Dr. V Mohan



## Covid 19 and Diabetes: A Complicated and Bidirectional Relationship

Dr. Supratik Bhattacharya



## Latest Developments in Therapeutics in Diabetes

Dr. Inass Shaltout

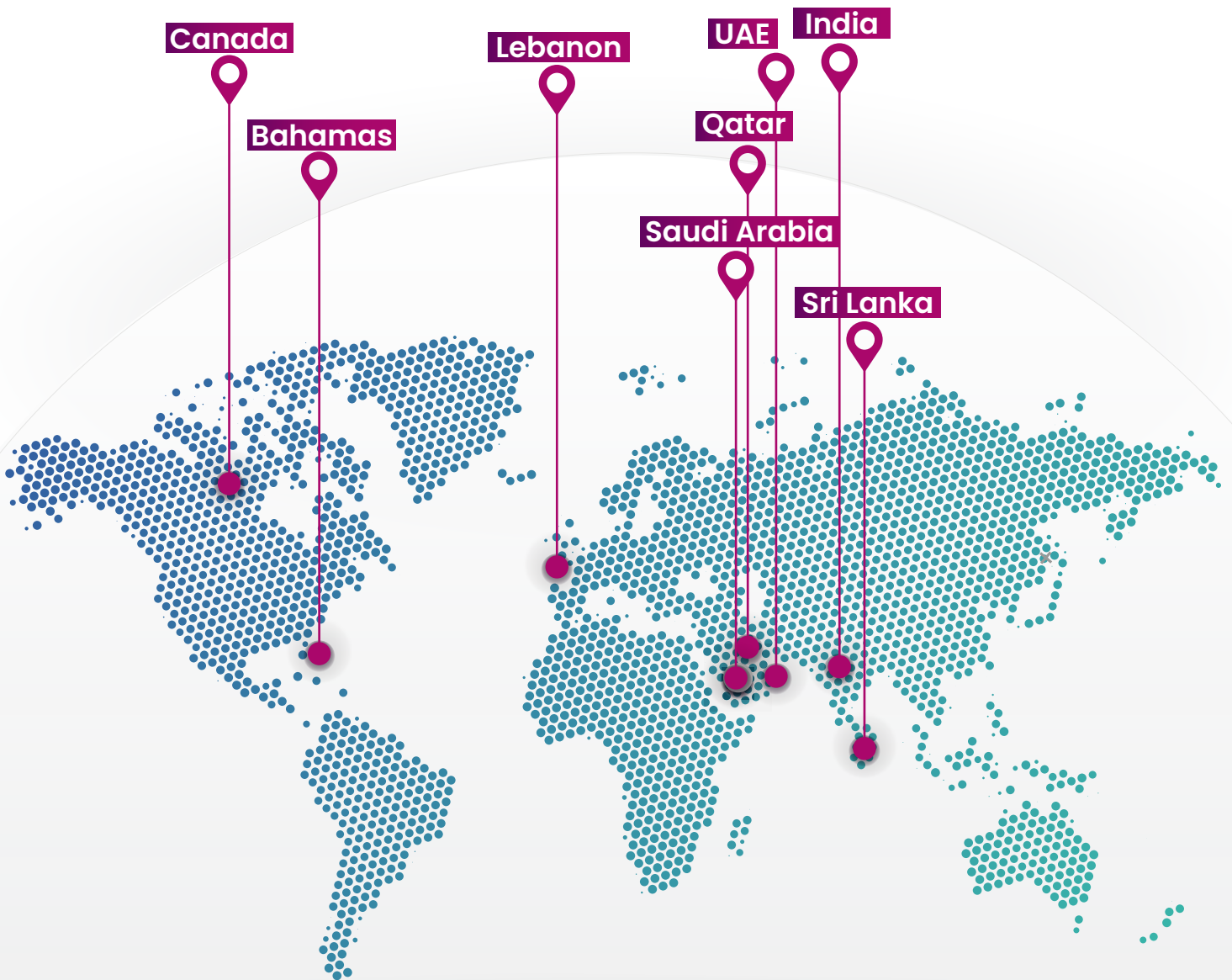
Moderators:



Dr. Nithin M Reddy |



Dr. Kulin Shah



**3000+** clinicians  
from **8 countries** and  
**175 cities** joined us!

[KNOW MORE](#)



# FUTURE LANDSCAPE FOR DIABETES

# GOOGLE SEARCH ANALYSIS

What is diabetes?

Diabetes signs & symptoms

Gestational diabetes

Diabetes insipidus

Diabetes associations

Diabetes care

American Diabetes Association

Type 1 diabetes

Type 2 diabetes

Most popular search  
keywords related to  
**Diabetes**

Diabetes treatment

Diabetes diagnosis/ tests

Diet plan for diabetes

Blood sugar levels

# KEY TAKEAWAYS | GOOGLE SEARCH ANALYSIS

1













Most popular searched keywords includes basic information about **diabetes, its types, diagnosis & its management.**

2

**Patient awareness & combined efforts** from all stakeholders will be required to **reduce the disease burden.**

References: Top Google Searching Keywords: Search results for diabetes ([topgooglesearches.blogspot.com](http://topgooglesearches.blogspot.com))

# NEW DRUG LAUNCHES & APPROVED INDICATIONS

2019  T2DM Indication			
	 Company	 Molecule	 Brand
<b>Apr</b>	Glenmark Pharmaceuticals	Remogliflozin	Remo Remozen
<b>Dec</b>	Cadila Healthcare	Vildagliptin & Vildagliptin+ Metformin	Vinglyn Vinglyn M
2020  T2DM Indication			
	 Company	 Molecule	 Brand
<b>Jan</b>	Boehringer Ingelheim Pharmaceuticals	Linagliptin+ Empagliflozin+ Metformin	Trijardy XR
<b>Mar</b>	Natco Pharma	Dapagliflozin	Dapnat
<b>Dec</b>	Glenmark Pharmaceuticals	Vildagliptin+ Remogliflozin	Remo V Remozen V
2021  T2DM + Chronic weight management Indication			
	 Company	 Molecule	 Brand
<b>Dec</b>	Novo Nordisk	Semaglutide	Ozempic

# KEY TAKEAWAYS | DRUG LAUNCHES

1

Proven additional benefits of **SGLT2i<sup>2</sup> & DPP4i<sup>1</sup>** has resulted into major drug launches.

<sup>1</sup>Dipeptidyl Peptidase 4 inhibitors, <sup>2</sup>Sodium/glucose cotransporter-2 inhibitors  
References: Top Google Searching Keywords: Search results for diabetes (topgooglesearches.blogspot.com)

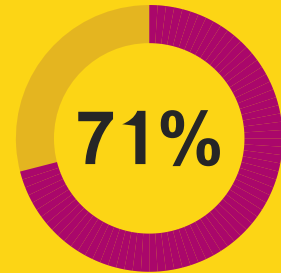
# KEY AREAS FOR ONGOING CLINICAL TRIALS

Dapagliflozin and saxagliptin/type 2 diabetes  
Glucose sensitive insulin **Care model/diabetes**  
Behavioural: Time-restricted feeding/type 2 diabetes  
Flash glucose monitoring/GDM Dexcom CGM/diabetes mellitus  
**Tirzepatide** Myo-inositol/GDM  
Sustain forte semaglutide 2.0Mg  
Ustekinumab/ type 1 diabetes **Icosema**  
Microbiome analysis & 16S rRNA gene-based analysis/type 1 diabetes  
SAR341402 (insulin aspart)  
OW Semaglutide +GIP **Clinical Trials** Empagliflozin (CVD, CKD)  
Biological: TOL-3021/diabetes  
Ideal pump insulin **Oxyntomodulin**  
Smartphone based telemedicine/type 1 diabetes Eccentric exercises/type 2 diabetes  
GIP/GLP-1 coagonist peptide and peptide II GIP R agonist long acting  
**Basal insulin-Fc** Semaglutide 1 mg PAD  
Peptide YY analogue agonist IMCY-0098/ type 1 diabetes  
GLP-1/glucagon dual agonist BI 456906 Dihydromyricetin/ type 2 diabetes  
**Insulin icodec** Cotadutide (GLP-1/glucagon dual agonist)  
DBPR108/DPP4/type 2 diabetes **Insulin 965**  
Glucocorticoid-free immunosuppressants  
Mobile application-based diabetes education/type 2 diabetes

# KEY TAKEAWAYS | CLINICAL TRIALS

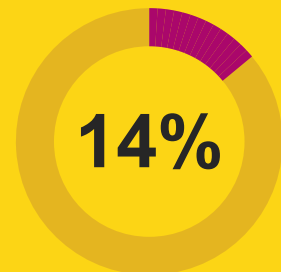
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Specific molecules



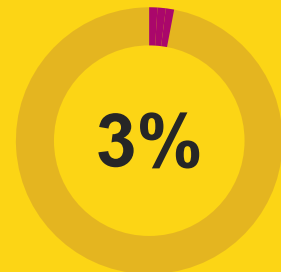
2

Digital diabetes management



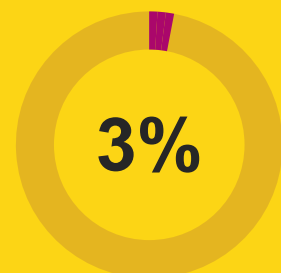
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Drug technology



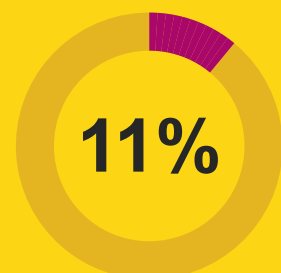
4

Diagnosis



5








Others




# MOST DISCUSSED TOPICS

## TRENDING TOPICS

### Management/Therapy

-  SGLT-2i<sup>2</sup> comparative effectiveness and differences
-  Dual GIP<sup>6</sup> and GL-P1 RA<sup>7</sup> in diabetes
-  Premix insulin in current era
-  Type 1 diabetes management and psychological issue in current scenario
-  Comparative effectiveness of glycemic control approaches
-  Dapagliflozin in COVID-19 hospitalized patients
-  Diabetes management and fasting Indian patients

### Digital care



-  Digital technologies including telemedicine, glycaemic control devices and software

<sup>2</sup>Sodium/glucose cotransporter-2 inhibitors, <sup>6</sup>Gastric inhibitory polypeptide, <sup>7</sup>Glucagon-like peptide-1 receptor agonists




# MOST DISCUSSED TOPICS

## TRENDING TOPICS



### Diagnosis/assessment

-  Changing paradigm of glycaemic level assessment: HBA1c to continuous glucose monitoring to time-in-range
-  Point-of-care ultrasound

### Complications

-  Diabetic ketoacidosis
-  CVD<sup>8</sup> -risk scoring and stratification
-  Sarcopenia in Indian Diabetic Patients

### Others

-  Diabetes and immunity
-  Type 1 and Type 2 diabetes impact on pregnancy

<sup>8</sup>Cardiovascular diseases,

References: RSSDI conference 2020 <https://rssdi.in/branch/eventcms/website1/schedule.php>, <https://pubmed.ncbi.nlm.nih.gov/?term=diabetes&filter=years.2020-2021>, <https://pubmed.ncbi.nlm.nih.gov/?term=dual+glp-1>, <https://www.scientificfederation.com/diabetes-2020/>

# ABOUT DOCPLEXUS

Docplexus is one of  
the **world's largest and most  
trusted online communities of  
verified doctors**, with

---

**3,80,000+ HCPs across  
99+ Specialties in  
1600+ Cities  
40+ Medical Associations  
as Knowledge Partners**

For more doctor insights reach us  
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