

INDIA'S OBESITY CRISIS: OPPORTUNITY AMIDST CHALLENGES FOR PHARMA

(By NPPA Team)

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INTRODUCTION

Obesity has emerged as one of the most pressing global health challenges of the 21st century, prompting the observance of World Obesity Day every year on March 4, to raise awareness and promote coordinated efforts to address this growing epidemic. As India grapples with an escalating obesity crisis, global pharmaceutical companies are turning their attention to the growing demand for weight loss/anti-obesity drugs in the country. With obesity rates on the rise and becoming a significant health concern, India presents a booming market for pharmaceutical companies who are eager to tap into this untapped potential. However, market entry and expansion are dependent on myriad factors like R&D and manufacturing capabilities, affordability and accessibility issues, sociocultural perceptions around obesity treatment, etc. This article explores the dual narrative of opportunity and challenge in this area, analysing how global and domestic pharmaceutical companies are positioning themselves in India's obesity management space and what action may be necessary to facilitate its sustainable development.



PRESENT SCENARIO: Analysis of market data

Obesity has reached alarming levels in India, with a significant proportion of the population struggling with obesity linked co-morbidities such as diabetes, hypertension, and heart disease. According to the National Family Health Survey-5 (NFHS-5), roughly one in every four Indians, both men and women, are overweight or obese, and a recent published study^[1] estimates that by 2050, India could have over 450 million overweight or obese adults. As a result, it is likely that there would be an increased usage of medications to treat obesity and obesity linked co-morbidities.

As per studies, it is observed that following drugs are prevalently being used in India for treatment of type-2 diabetes, and weight loss management:

- **SEMAGLUTIDE:** Targets brain centres that regulate appetite, especially after eating, help in reducing food intake, slowing stomach emptying prolonging the feeling of fullness.
- **LIRAGLUTIDE** Stimulates insulin secretion in response to glucose, lowers plasma

- **ORLISTAT** promotes weight loss by reducing dietary fat absorption in the intestines.

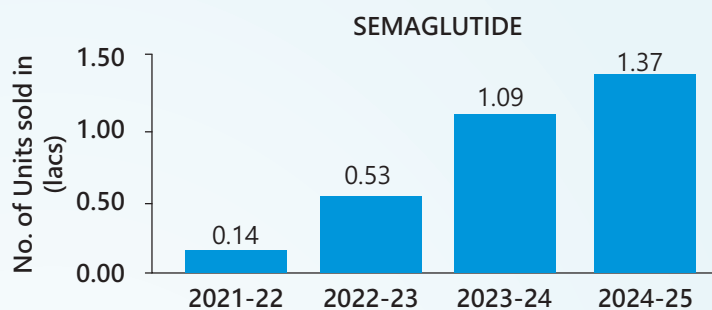
As the above drugs are also prescribed for weight management, the trend in their annual sale in Indian market can serve as an important indicator for estimating the demand for weight loss/weight management drugs in India. Accordingly, the market available data of the no. of units these drugs being sold has been examined.

As per analysis of market data in Graph 1, 2 & 3, it is observed that the sale of type-2 diabetes and weight loss drugs viz. Semaglutide, Orlistat and Liraglutide has showcased upward growth trajectory in Indian markets from the year 2021 to Feb 2025 with Semaglutide registering 10 times increase in its sale in a period of just 5 years. This clearly shows an increasing demand for these medicines in India during the period 2022 to 2025.

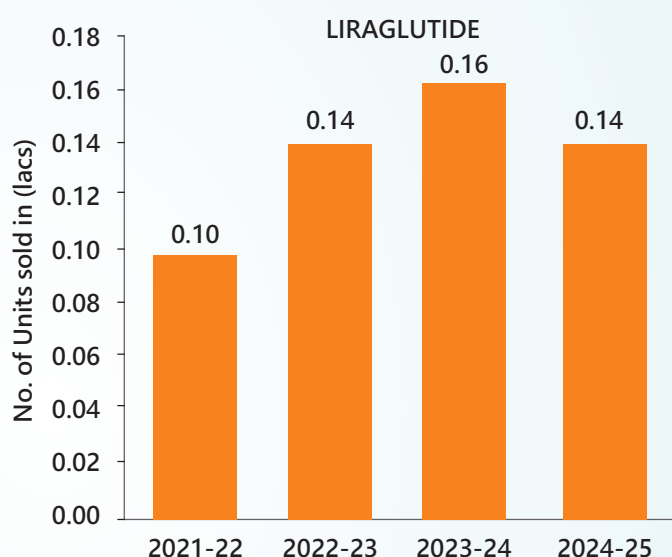
OBESITY AND DIABETES MANAGEMENT DRUG SUPPLY IN INDIA : Opportunities and Challenges

To tap this unprecedented demand for type 2 diabetes and weight management drugs, several Pharmaceutical companies^[2] such as Novo Nordisk, Eli Lilly, and AstraZeneca, Intas, Cipla which have made breakthroughs with obesity treatment drugs in Western markets, are either in the stage of introducing these innovations in India or are already major suppliers in the Indian market. These drugs have been shown to help patients lose significant amounts of weight, and clinical studies highlight their potential to reduce the risks associated with obesity related diseases. However, the path to success for the pharmaceutical industry in India is fraught with unique challenges. The demand for weight management medications in the Indian context is shaped by several critical factors, including affordability, accessibility, and the practicality of drug administration methods.

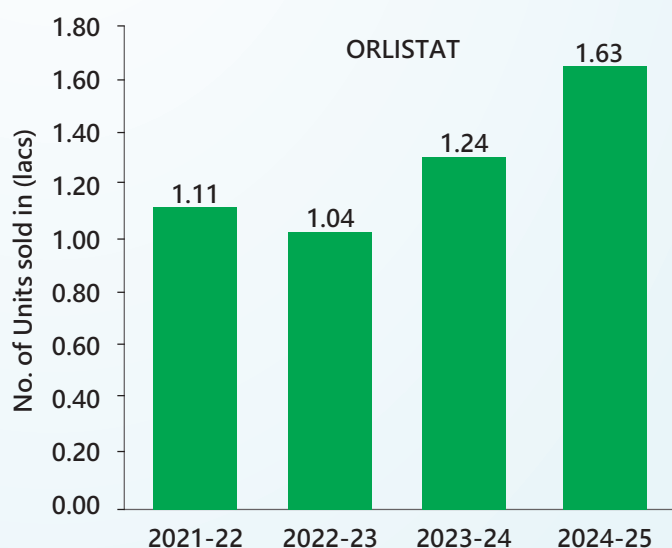
As per market data, it is observed that obesity treatment drugs are expensive and this can be



Graph 1- Semaglutide: Year wise (Feb 2021- Feb 2025)
no. of units sold



Graph 2- Liraglutide: Year wise (Feb 2021- Feb 2025)
no. of units sold



Graph 3- Orlistat: Year wise (Feb 2021- Feb 2025)
no. of units sold

a major challenge in a price-sensitive market like India. For example, some of these drugs which costs around \$1,000 per month in the U.S., is unlikely to be affordable for a wide base of population in India. While global pharma companies may lower prices to cater to Indian consumers, the high cost of research and development, along with production and distribution expenses, could still make it difficult for these companies to offer affordable pricing on a large scale.

Moreover, many of the current pharmacological treatments for weight management, are administered via subcutaneous injections, on a regular basis. While these therapies have demonstrated substantial efficacy in clinical trials, their injectable nature may limit widespread adoption, particularly among individuals who prefer oral medications for reasons of convenience, comfort, or accessibility. This general preference for oral administration^[3] suggests that the development of effective weight management pills could significantly broaden the reach and impact of anti-obesity interventions.

India's unique healthcare landscape and the existing gap in the anti-obesity drug market present a strategic opportunity for the domestic pharmaceutical industry to contribute meaningfully to sustainable healthcare development. While several Indian pharmaceutical companies have expressed intentions to enter the obesity drug market, their current capabilities may have posed constraints. The Indian pharma companies may make use of this window of opportunity by exploring strategic collaborations with global players. By pursuing partnerships for in-licensing, distribution, and local manufacturing, Indian firms can accelerate access to these medicines across diverse regions in India. Furthermore, dedicated investment in R & D capacity and in the development of active pharmaceutical ingredients (APIs) for weight management drugs can not only reduce dependence on imports but also position India as a key global supplier in this emerging therapeutic area.

In addition to the above factors, the cultural dimension also plays a vital role in usage of anti-obesity drugs in India. Indians have historically been less focused on weight loss treatments compared to Western countries. Cultural attitudes towards body image are even more complex. While obesity is increasingly seen as a health risk, there is a social stigma around the idea of dieting or taking medication for weight loss. Public perception could impact the uptake of weight loss drugs, especially if they are viewed as a last resort rather than a preventive measure.

In conclusion, while global and domestic pharmaceutical companies recognize the immense potential of the Indian market for weight loss drugs, several factors complicate their ability to capitalize on this opportunity. The high cost of treatment and cultural attitudes toward obesity treatment are some of the barriers that need to be addressed before these drugs can become a mainstream solution in India. Nevertheless, as the obesity crisis continues to grow, and awareness around the associated health risks increases, pharmaceutical companies may find ways to overcome these challenges, offering affordable and accessible solutions to the Indian market

^[1] Lancet 2025; 405: 813–38; Global, regional, and national prevalence of adult overweight and obesity, 1990–2021, with forecasts to 2050: a forecasting study for the Global Burden of Disease Study 2021; GBD 2021 Adult BMI Collaborators*

^[2] <https://www.outlookbusiness.com/in-depth/novo-nordisk-and-eli-lilly-bring-weight-loss-contest-to-india>
<https://www.livemint.com/companies/eli-lilly-weight-loss-drug-anti-obesity-drug-mounjar-o-diabetes-drug-glp-1-ozempic-cipla-dr-reddy-s-lupin-mankind-pharma-11742461296043.html>

^[3] (Smith et al., 2022; Johnson & Lee, 2021) Research paper has shown that patient adherence and acceptance are often higher with oral formulations compared to injectable therapies, especially in chronic disease management contexts.