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Obesity Market in India Undergoes Rapid Transformation as Price Reductions Drive Unprecedented Growth in GLP-1 Agonist Adoption: Pharmarack

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India’s anti-obesity therapeutics market is witnessing a significant structural shift, driven by evolving obesity prevalence patterns, rising awareness in urban centres, and most notably, recent price reductions from innovator companies. New market analysis reveals that affordability is emerging as the single strongest catalyst for GLP-1 agonist uptake in the country, according to Sheetal Sapale — Vice President (Commercial) at Pharmarack Technologies.

Sheetal in her presentation noted that there is a striking imbalance between population contribution and GLP-1 agonist sales across states. Such as Uttar Pradesh, comprising 17 per cent of India's population, contributes only 8 per cent of national GLP-1 agonist sales; Maharashtra (including Mumbai), representing 9 per cent of the population, generates a disproportionate 24 per cent share of sales; The Delhi-Punjab-Haryana-Chandigarh region, with 7 per cent of the population, accounts for 16 per cent of sales. These disparities highlight higher awareness, affordability, and healthcare engagement in major metros—particularly Mumbai and Delhi—driving disproportionate demand.

“Obesity continues to escalate across India, with national prevalence estimated at around 40 per cent, and even higher rates across major metro cities. Chennai, Delhi, Kolkata, and Bengaluru report notably elevated obesity levels, underscoring the growing public-health urgency. Despite similar or higher prevalence in other large cities, treatment penetration remains uneven,” she added.

India’s anti-obesity market has grown from Rs 87 crore to nearly Rs 1,000 crore, marking a tenfold expansion in just five years. GLP-1 agonists, the fastest-growing category, continue to show strong overall performance, though adoption varies sharply across regions.

Sheetal pointed out that a major turning point occurred in mid-November following a price reduction in select innovator GLP-1 brands. Key findings include: Wegovy consumption increased 1.7× within just 15 days of the price drop. Pre-filled syringe doses, previously costing Rs 4,000–6,000, are now priced between Rs 2,700–4,000, significantly improving accessibility. Mounjaro pricing remained unchanged, yet the overall category saw heightened activity due to shifting affordability dynamics. Should current trends continue, Wegovy’s market share—already rising from 10 per cent to 14 per cent in November—may cross 20 per cent by December,

Sheetal further observed that both major brands currently maintain 30–40 days of national inventory (Wegovy- 37 days and Mounjaro -14 days), ensuring smooth availability and supporting rapid category expansion. Higher inventory readiness, combined with reduced pricing, is expected to drive accelerated adoption across new geographies.

With multiple Indian pharmaceutical companies preparing generic semaglutide launches after 2026, pricing strategies are expected to undergo major recalibration. The recent price cuts may force upcoming entrants to revisit their planned launch pricing. Innovators who balance affordability with brand trust stand well-positioned to retain leadership.

“Despite the robust growth, India’s obesity-care market remains significantly underpenetrated relative to the scale of need. The combination of high prevalence, rising awareness, improved affordability, and future generic entry signals substantial growth headroom for both innovators and generics,” she concluded.