

## Strategic Analysis of the South African Diabetes Markets

**Description:** This Frost & Sullivan research service titled Strategic Analysis of the South African Diabetes Markets provides an overview of the South African healthcare industry in the context of diabetes treatment drugs as divided between Type 1 and Type 2 diabetics. In this research, Frost & Sullivan's expert analysts thoroughly examine key industry challenges, drivers, restraints, and trends. Revenue forecasts and strategic recommendations are also provided.

### Market Overview

#### Rising Number of Diabetics Points to Sustained Future Demand for Anti-Diabetic Medication

Nearly 6.4 per cent of South Africa's population is diabetic. In 2006, 1.7 million were diagnosed with diabetes – 170,000 with Type I diabetes and 1,530,000 with Type II diabetes. The balance remains undiagnosed; however, 187,000 new cases were diagnosed as well. The South African diabetes market is growing rapidly, primarily as a result of higher diagnosis rates, which are increasing because of easier access to healthcare. "The anti-diabetic pharmaceutical market in South Africa is firmly in the growth stage as a result of not only better access to healthcare delivery, but also due to drastic changes in lifestyle," states the analyst of this research. "Hence, more South Africans are seeking treatment and are being diagnosed with the disease, boosting the prospects of anti-diabetic pharmaceutical manufacturers."

As the market expands, it has brought about a choice for patients between ethical and generic drugs as well as between prices. Type 2 diabetics, who comprise 90 per cent of all diabetics, are shifting towards the treatment used by Type 1 diabetics, namely insulin. Almost 16 per cent of all Type 2 diabetics are complementing their oral treatments with the more expensive insulin. This trend is gaining momentum and is significantly boosting the revenues and sustained growth of the anti-diabetic pharmaceutical market. With the beginning of awareness campaigns, increased testing, better diagnosis and larger numbers seeking treatment, the market is showing signs of potential for tremendous profit. The market is in its early stages of development and will expand dramatically with growth rates set to rise, annually. The escalation in incidence rates coupled with the shift towards insulin will add to market value. With better economic prospects and an enhanced standard of living, many are seeking treatment and will do so in future. The Type 2 diabetic population will grow at a rate of nearly 9.0 per cent per annum and, in 2012, will comprise about 93.1 per cent of total diabetics. These demographics indicate that the anti-diabetic pharmaceuticals market in South Africa is on a path of rapid growth.

#### Reimbursement Issues and Reference Pricing Continue to Dampen Market Prospects

The South African pharmaceutical industry is extremely regulated. It is very difficult to market high-priced drugs owing to reference pricing and reimbursement issues. "Due to spiralling healthcare expenditures, the South African government is resorting to strict cost-containment measures," cautions the analyst. "As oral drugs cost less than insulin and other novel anti-diabetic drugs, the market is set to be driven by the cost factor: the government is likely to purchase cost-effective drugs rather than costly alternatives."

The need for oral anti-diabetic drugs with tighter glycaemic control abilities and alternative methods of insulin delivery constitute a key market need. Companies able to fulfil this need stand to make strong gains. Manufacturers should try to lower costs and, at the same time, maintain a high level of quality. This strategy will enable them to capture greater market share.

### Market Sectors

Expert Frost & Sullivan analysts thoroughly examine the following market sectors in this research:

- Oral anti-diabetic (OAD) drugs
- Insulin

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