

THREAT OF DIABETES IN SOUTH-EAST ASIA:

BURDEN AND MEASURES

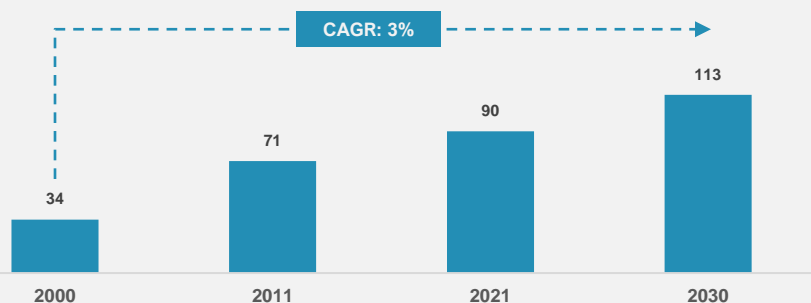
As a result of various genetic, societal, and environmental factors, the **prevalence of diabetes has risen by 30% during 2013-2023 and is projected to grow by an additional 25% by 2030 according to the WHO**. This upward trend has led to increased investment in the diabetes management and care sector, which is anticipated to double by 2030. The approach to addressing diabetes will primarily involve **integrating AI, forming private partnerships, and implementing government initiatives**.

DISEASE BURDEN: KEY METRICS

As per the International Diabetes Federation (IDF), the Southeast Asia (SEA) region, including India, Sri Lanka, Bangladesh, Bhutan, Mauritius, and Maldives, had 34 million adults with diabetes in 2000. This number is projected to be 113 million by 2030, with nearly 95% being Type 2 diabetes. Prevalence of diabetes by certain key metrics has been illustrated below:

1. Overview

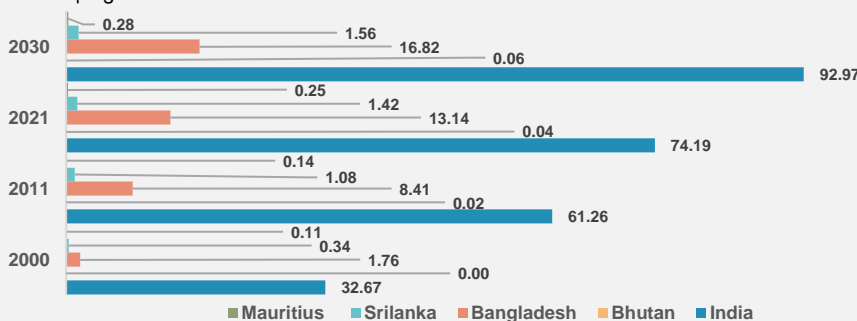
Prevalence of diabetes in SEA (20-79 years age group)
2023 | Figures in Mn



- The number of people living with diabetes is projected to **increase by 25% by 2030 from present day numbers**.
- **Over 1 in 2 (51.2%) adults living with diabetes are undiagnosed**, which puts an unidentified burden on our healthcare system.
- Diabetes is responsible for **747,000 deaths in 2021**.

2. Prevalence of diabetes by countries

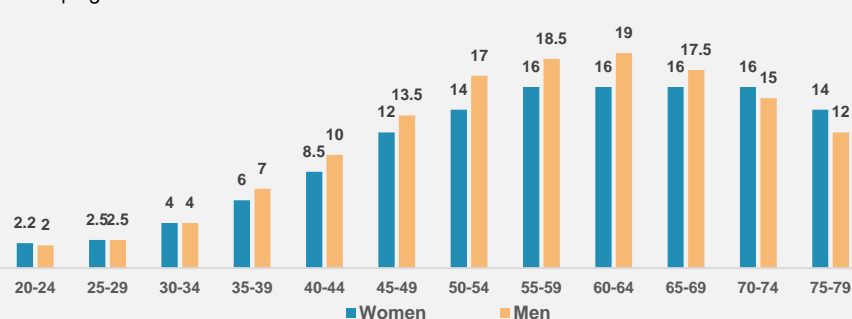
Prevalence of diabetes in SEA by countries
2023 | Figures in Mn



- Around **77 million individuals aged 18 and above are afflicted with type 2 diabetes in India in 2023**, while approximately 25 million are in a prediabetic state, posing a heightened risk of developing diabetes soon.
- As per the WHO report, **diabetes affected 8% (~14 million) of Bangladesh's total population in 2023**, with diabetes contributing to 3% of all-age deaths.

3. Prevalence of diabetes by age and sex

Prevalence of diabetes in SEA by age and sex
2023 | Figures in %



- Prevalence is **similar between men and women during the ages of 20 to 34**.
- However, as they grow older (34-70 years of age) prevalence **increases in men due to heightened hypertension and a hectic lifestyle**.
- Among adults over 70 years, it is noted to be **higher in women due to increasing insulin resistance**.

DIABETES MANAGEMENT INITIATIVES

Robust government policies, partnerships in the private sector, and growing R&D efforts in the diabetes management space have helped curbed the severity of the condition.

WHO's South-East Asia-HEARTS (SEAHEARTS) initiative	<ul style="list-style-type: none">WHO's SEAHEARTS initiative is actively addressing diabetes and hypertension and aims to put 100 million people on protocol-based management by 2025.
Government initiatives	<ul style="list-style-type: none">In 2017, the Indian government initiated the '75-25' program with the goal of screening and providing standard care to 75 million individuals with diabetes and hypertension by 2025 through Primary Healthcare Centers.Singapore's 'War on Diabetes,' campaign aimed at preventing and controlling diabetes by launching numerous awareness campaigns across the country.
Private partnerships	<ul style="list-style-type: none">In 2023, Roche partnered with Indian companies Sanmina-SCI India Pvt. Ltd. and Parekh Integrated Services Pvt. Ltd. (PISPL) to locally produce Accu-Chek Active, aiming to cut costs and speed up time-to-market.Dexcom launched a digital diabetes management service in South Korea in Q4 2023, collaborating with Kakao Healthcare to integrate AI and software technology, enhancing diabetes care quality and reducing socio-economic costs in the country.

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HOW CAN ARANCA HELP?

01

Market assessment: Disease burden/disease landscape, Diagnosis and Treatment Paradigm, Humanistic and Economic Burden

02

Current and Future Landscape: Current treatments and latest pipeline landscape assessment for a particular therapy area

03

Strategic initiative analysis: Understanding key market trends in terms of M&As, funding, deals and other pertinent strategic initiatives

04

Health Technology Assessment: Analysis of various HTA decisions published by various countries

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