

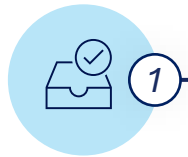
Mounjaro Uptake and Physician Perception in India

Market Entry, Adoption, and Clinician Viewpoints

Source: Physician Survey Data (2025) N=105, Conducted by SPER Market Research

Specialties: Endocrinology, Diabetology, GP, Internal Medicine, Others

Summary Insights



Awareness

85% physicians are aware of Mounjaro; over half understand its dual mechanism.



Adoption

~55% have prescribed or plan to prescribe within 6 months. Uptake still <10% of eligible patients.



Drivers

Weight efficacy and glycemic benefits dominate adoption rationale.



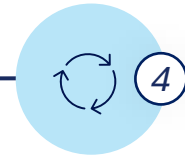
Perception

Mounjaro viewed as a **“promising game-changer”** pending Indian market access and affordability reforms.



Future Outlook

65% foresee moderate-to-strong adoption growth once pricing and guideline alignment improve.



Barriers

Price, availability, and local data gaps remain top hurdles.



Prescribing Status and Patient Selection



105

Indian Physicians
Surveyed



14.6

Years Avg.
Experience



52%

Avg. Patients with
T2D

Actively Prescribing

31% currently prescribe
Mounjaro

Planning to Start

24% plan to prescribe within 6
months

Aware But Waiting

35% aware but not yet prescribing

Most physicians prescribe for **T2DM with obesity (74%)**, while 18% use for obesity only. However, **75% of eligible patients receive less than 10%** penetration currently.

Adoption Drivers & Barriers

Superior Weight Reduction

78% cite this as primary driver



Improved Glycemic Control

62% cite access and distribution challenges



Dual Incretin Mechanism

52% appreciate the innovative GIP+GLP-1 action



Patient Demand

31% respond to increasing patient requests



High Cost / Affordability

83% identify price as the top barrier preventing broader use



Limited Availability

62% cite access and distribution challenges

Guideline Gaps

47% note absence from Indian clinical guidelines



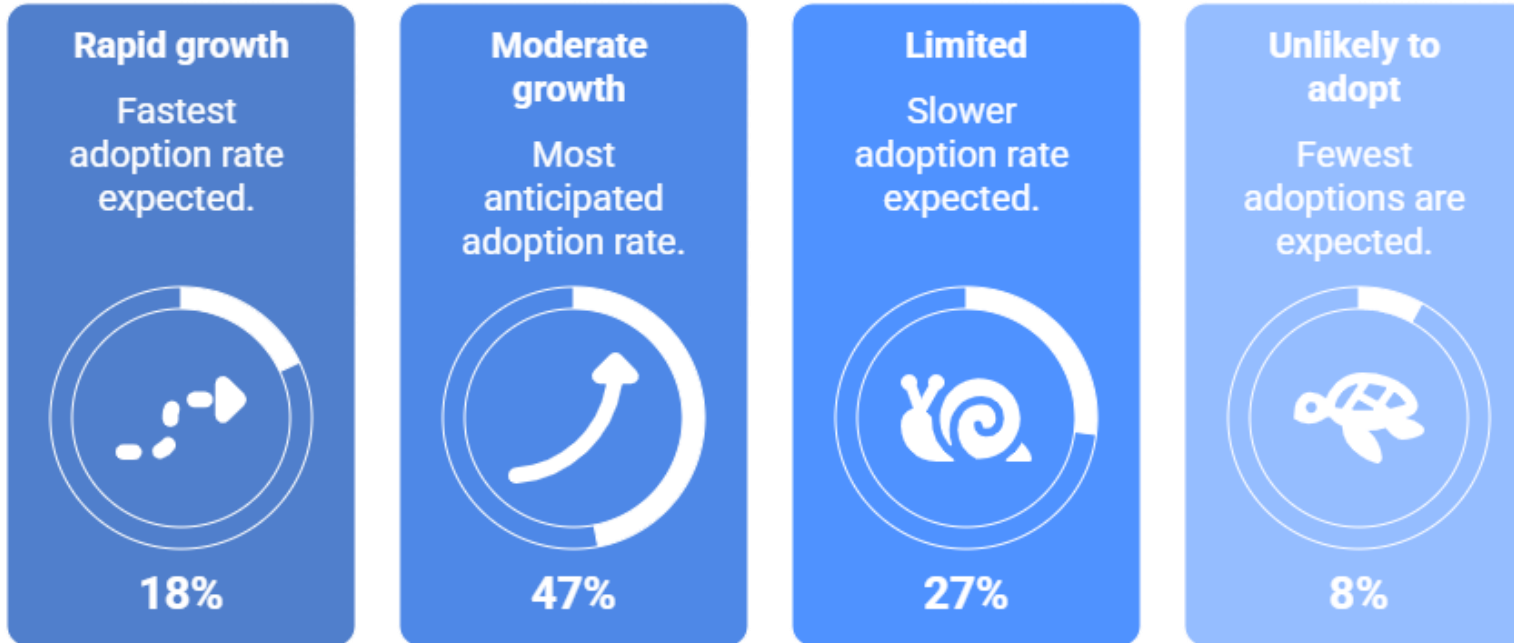
Safety Data

33% want more long-term Indian safety evidence



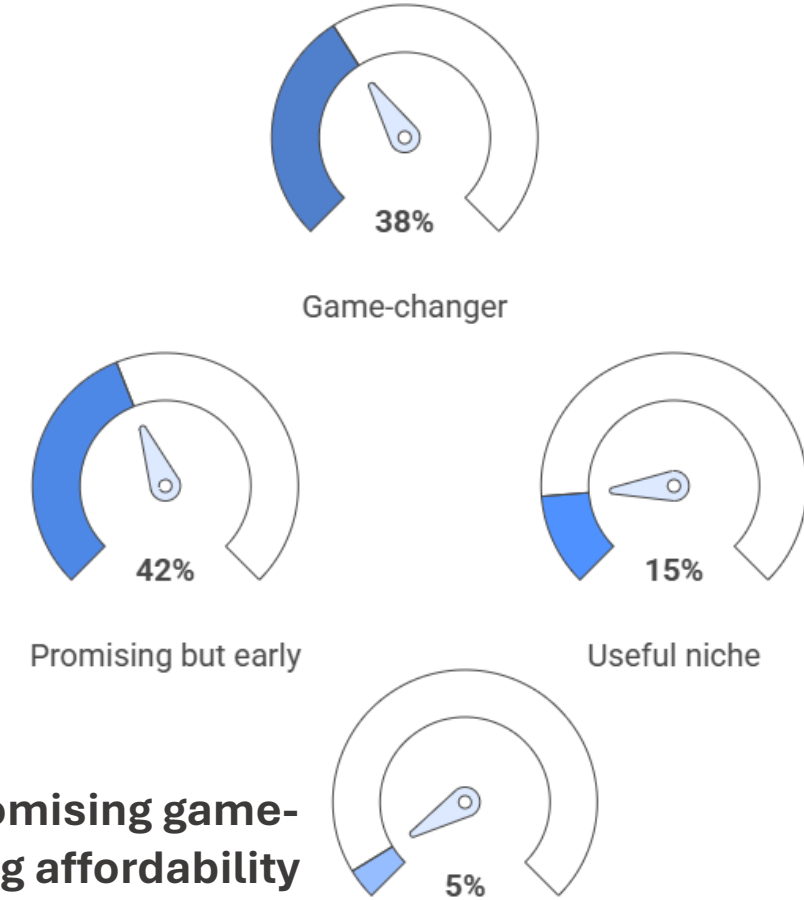
Future Outlook

Expected Adoption in Next 12 Months



Moderate growth is the most anticipated adoption rate.

Overall Perception



Mounjaro: A promising game-changer pending affordability reforms and market access improvements

Overhyped / limited role
SPER MARKET RESEARCH

Do you have any questions?

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