

INDIA'S OBESITY CRISIS IS A MARKET- SHAPING FORCE

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Introduction



India has crossed a critical inflexion point. What was once dismissed as a niche aesthetic concern or a byproduct of individual "lack of willpower" has evolved into a full-blown public health crisis. Today, the statistics are as heavy as the health burden they represent: **one-third of urban Indian adults are overweight or living with obesity.**

For the C-Suite and marketing leaders, these aren't just health data points; they are indicators of a **massive shift** in consumer psychology, lifestyle choices, and spending patterns. Our trajectory now mirrors high-prevalence markets like the US, where urban obesity levels are shockingly close to our own.

To navigate this landscape, brands must move beyond surface-level engagement and understand the deep-seated "**Obesity Paradox**" unfolding in the Indian market.

The Ipsos Global Report:

A DEEP DIVE INTO THE INDIAN PSYCHE

Our recent *Ipsos Global Perceptions on Obesity* report reveals a consumer psyche that is deeply fractured and uniquely Indian. While obesity is a global challenge, the emotional and behavioural nuances in India are distinct:

The Self-Blame Cycle

In a survey across 14 countries, we found that **Indians living with obesity blame themselves significantly more** than their global peers. Weight-related discussions play out in every Indian family, and the resulting guilt and shame often lead to social withdrawal and lower confidence.

The Fad Diet Trap

Because of this desperation and a perceived "personal failure," **53% of Indians resort to fad diets**—the highest rate globally. These attempts often end in frustration, as the body's internal metabolic mechanisms could resist these fads, often extreme or unscientific regimens.

The Awareness Gap

The link between obesity and chronic risks like Type 2 Diabetes and cardiovascular disease **is weaker in India than in other markets**. Weight loss is an end goal in itself for many. While consumers are actively seeking solutions, most Indians still view weight loss through the lens of "vanity"—fitting into clothes or social acceptance—rather than metabolic longevity.

A Hunger for Guidance

Interestingly, **50% of Indians living with obesity have discussed their weight with a doctor in the past year**. Furthermore, **40% have been advised by a clinician to use digital tools or structured weight-management programs**, a figure well above the global average.

The Hidden Enemy: The "Thin-Fat" Phenotype

To lead in this space, one must understand that obesity in India doesn't always look the same as it does in the West. We are witnessing the rise of the "thin-fat" phenotype. Many Indians with a "normal" BMI carry dangerous levels of visceral fat—the "bad fat" that surrounds internal organs, causing systemic inflammation and swelling.

This visceral adiposity is the engine behind cardiovascular disease, yet awareness remains low. For healthcare marketers, the opportunity—and the responsibility—lies in medicalising the conversation: shifting the focus from "looking good" to reducing visceral fat for metabolic health. For other sectors, this awareness can only go up, and consumers' choices about the foods and beverages they consume and their lifestyles will shift. You need to be prepared for this.



The crux of the current situation seems to be this: **the Indian ecosystem is currently primed for obesity.** To even begin to swim against this tide, consumers need to overcome multiple barriers:

Easy-to-access unhealthiness

Ultra-processed, high-calorie foods are ubiquitous and cheap, while "clean-label" options are expensive and difficult to find.

Being sedentary and indoors

In bigger cities like Mumbai, outdoor spaces for leisure, play, or exercise are nearly non-existent. In Delhi, these might exist, but the air quality makes access difficult.

The Social Trap

All around us, many of us are subjected to this almost every week, socialising is synonymous with eating out, drinking and late nights. Choosing not to indulge often leads to being unpopular and not knowing how to enjoy oneself.

The Stress Multiplier

One in two corporate professionals in India is at risk for poor mental health. This stress, combined with excessive screen time and sleep deprivation (averaging 7.4 hours but often much less), sabotages metabolic health before the consumer even picks up a fork.



For women, these challenges are compounded by biological milestones—puberty, pregnancy, and perimenopause—where weight gain is often unavoidable, and weight loss becomes increasingly difficult.

The Clinical Pivot: GLP-1s and the Medical Mandate

The dialogue is moving from "eat less, move more" to treating obesity as a **chronic, relapsing medical condition**. The advent of **GLP-1-based therapies** offers "metabolic correction," addressing the internal dysfunction that makes weight loss feel impossible.

Weight loss is a clinical journey that must be conducted under strict medical supervision. While GLP-1s are a breakthrough, their misuse as "lifestyle shortcuts" without a doctor's guidance risks severe metabolic disruption and unmanaged side effects. These are prescription-only therapies requiring individualised titration, a long-term maintenance plan that includes protein sufficiency and strength training to prevent muscle loss, and extensive supervision.



STRATEGIC SECTOR IMPLICATIONS: **THE RIPPLE EFFECT**

Strategic Sector Implications: The Ripple Effect

This shift towards medicalized health will disrupt every consumer category



Healthcare Marketers: Training the Frontline

Healthcare brands must go beyond selling a molecule and start building care pathways. A critical task for marketers is equipping doctors to have more effective conversations. This includes:

- ✓ Providing tools to explain "visceral risk" rather than just "weight".
- ✓ Creating **shared decision-making aids** that help patients move past self-blame toward clinical management.
- ✓ Developing **adherence ecosystems**—starter kits, injection tutorials, and digital trackers—that measure success beyond the scale (e.g., waist circumference and HbA1c).

Strategic Sector Implications: The Ripple Effect

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Food & Beverage: The Moderation Mandate

As appetite-suppressing therapies scale, some cola brands are already pivoting toward **smaller pack sizes and shorter ingredient lists**.

In India, we expect a surge in demand for "**workday-safe**" and "**festival-safe**" lines that offer protein-rich, high-fiber, and low-sugar alternatives for a consumer base that will grow to be increasingly focused on metabolic reset.

Strategic Sector Implications: The Ripple Effect

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Sports & Fitness: From Cardio to Strength

The fitness industry must pivot from "weight loss" to "**metabolic health.**"

This means a move toward **strength-first programming** designed to improve insulin sensitivity and combat muscle loss associated with rapid medical weight loss.



Strategic Sector Implications: The Ripple Effect

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Travel & Airlines: Provisioning the New Traveller

The travel sector can no longer ignore passengers' health.

Opportunities lie in **healthier F&B provisioning**, onboard movement content, and loyalty tie-ups with wellness and diagnostic ecosystems.

Slow holidays and getting more outdoors are already trends gaining traction.



Strategic Sector Implications: The Ripple Effect

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Apparel & Lifestyle: Sizing and Inventory

Apparel brands must prepare for a significant shift in **size curves and inventory mix**.

Beyond just smaller sizes, there is an opportunity for **inclusive, adjustable fits** that accommodate patients during their weight-loss journey.

CONCLUSION

THE CALL TO ACTION FOR LEADERS



Obesity is no longer an individual's struggle; it is a market-shaping force. The winners in this new era will be the brands that:

Destigmatise and Medicalise:

Replace moralising language with a clinical focus on metabolic health.

Bundle Solutions:

Create cross-category alliances between clinics, digital tools, and nutrition brands to deliver complete longitudinal journeys.

Personalise by Life Stage, gender, medical condition:

Understand that a menopausal woman's journey is fundamentally different from a young man with high cardiovascular risk.



The Indian consumer is ready for a new care pathway. They are seeking experts who understand that their struggle isn't about a lack of effort, but a lack of the right ecosystem.

At Ipsos, we don't just see the numbers; we see the consumer's lived experience and the doctor's clinical reality. We know what is happening in the market and what is coming next.

The question for your organization is:

Are you ready to lead the shift?

Let's discuss how these insights can redefine your category strategy. Contact us today to navigate the future of health in India.



THANK YOU

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