VITAMIN B12 AND FOLATE DEFICIENCY ANEMIA PATHOGENESIS DIAGNOSIS AND PREVENTION OF NEUROLOGICAL COMPLICATIONS

Eshbo'riyeva Robiya Ziyodulla qizi
Student of Samarkand State Medicial University
robiya06.qobilova@gmail.com
Jalolova Bahora Hamroqul qizi
Student of Samarkand State Medicial University
bahorajalolova22@gmail.com
Rakhmatova Sevinch Foziljon qizi
Student of Samarkand State Medicial University
sevinchraxmatova092@gmail.com
Bahodirova Elshoda Mahammadali qizi
Student of Samarkand State Medicial University
bahodirovaelshoda5@gmail.com,

Abstract: Vitamin B12 and folate deficiency impair DNA synthesis and can cause megaloblastic anemia, but their clinical consequences are not interchangeable. Vitamin B12 deficiency may produce peripheral neuropathy, gait disturbance, and spinal cord dysfunction even when anemia and macrocytosis are absent. Delayed recognition can leave persistent neurological disability despite subsequent hematological recovery. This narrative review considers the biochemical basis of ineffective erythropoiesis, interpretation of vitamin assays and metabolic markers, investigation of dietary and absorptive causes, and selection of replacement therapy. Methylmalonic acid helps clarify selected uncertain B12 results, whereas homocysteine is less specific because it also increases in folate deficiency and other conditions. Treatment should not be delayed when neurological disease strongly suggests B12 deficiency. Folate replacement must be accompanied by assessment of B12 status because correction of anemia can conceal an unresolved neurological problem. Effective care also requires identifying irreversible causes that make long-term replacement necessary.

Keywords: vitamin B12, folate, megaloblastic anemia, methylmalonic acid, neuropathy.

Methods

This focused narrative review synthesizes clinical guidance and relevant primary study reports identified through targeted searches of guideline publishers, PubMed, and regulatory sources. Sources were selected for their relevance to diagnostic interpretation, treatment selection, and longitudinal care. Findings are discussed qualitatively; no systematic-review claim or pooled effect estimate is made.

Introduction

Megaloblastic anemia describes a disturbance of cellular maturation rather than a single disease. Defective DNA synthesis causes nuclear maturation to lag behind cytoplasmic development, producing ineffective marrow output and characteristic blood film findings. Vitamin B12 and folate deficiency are major reversible causes, although medications and marrow disorders can produce similar appearances.

The diagnostic challenge extends beyond recognizing a high mean corpuscular volume. Combined iron deficiency may conceal macrocytosis, and neurological B12 deficiency may develop without anemia. A clinically useful assessment therefore brings the blood count together with symptoms, diet, gastrointestinal history, medication exposure, and neurological examination. This review emphasizes the decisions that prevent avoidable diagnostic delay.

Biochemical Mechanisms and Diagnostic Pitfalls

Assessment begins with a complete blood count, reticulocytes, blood film, B12 and folate testing, and a neurological examination when symptoms suggest nervous system involvement. Alcohol exposure, liver disease, hypothyroidism, medications, and myelodysplasia belong in the macrocytosis differential. Anemia accompanied by leukopenia or thrombocytopenia may reflect severe vitamin deficiency, but persistent abnormalities after adequate replacement require reconsideration. The diagnostic question is therefore broader than whether a vitamin concentration is below the laboratory range.

Vitamin B12 participates in methionine synthase and methylmalonyl-CoA mutase reactions. Deficiency disrupts folate-dependent DNA synthesis and raises methylmalonic acid. Folate deficiency also impairs nucleotide production and raises homocysteine, but it does not produce the characteristic methylmalonic acid elevation attributable to B12 deficiency. This biochemical distinction explains why the two deficiencies can have similar hematological findings while requiring different investigation [1, 3].

Macro-ovalocytes and hypersegmented neutrophils support megaloblastic hematopoiesis, but their absence does not exclude early disease. Severe ineffective erythropoiesis can produce a striking lactate dehydrogenase increase and indirect hyperbilirubinemia with an inadequate reticulocyte response. This can be mistaken for peripheral hemolysis unless marrow production is considered.

A borderline serum B12 result should be interpreted against symptoms and pretest probability. Methylmalonic acid is useful in selected uncertain cases, but renal impairment can increase it independently. Homocysteine is affected by folate status and renal function and should not be treated as a specific B12 test. Recent supplements can alter serum measurements without demonstrating that tissue deficiency has been adequately treated.

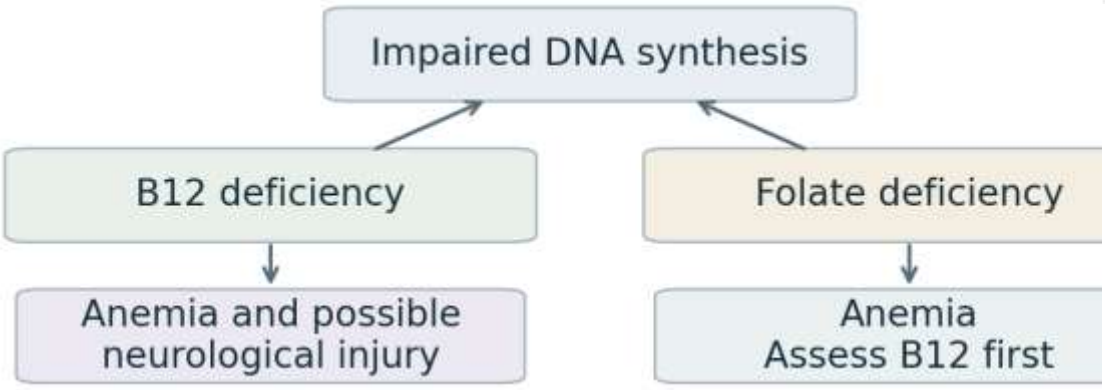


Figure 1. Two Deficiencies with Different Risks

Selecting Replacement and Protecting the Nervous System

The urgency of B12 treatment is determined partly by neurological findings. New sensory loss, impaired vibration or position sense, gait instability, and compatible cognitive or psychiatric changes require prompt evaluation. Blood samples should be collected before replacement when feasible, but treatment should not be postponed while awaiting results when megaloblastic anemia and neurological symptoms suggest a serious deficiency [1].

Oral high-dose B12 can be effective when an appropriate regimen is reliably taken. Intramuscular replacement is particularly important when absorption is permanently impaired, symptoms are severe, or adherence to oral therapy is uncertain. NICE recommends lifelong intramuscular replacement for deficiency caused by autoimmune gastritis, total gastrectomy, or complete terminal ileal resection. These situations differ from a reversible dietary shortage, where the long-term plan may change after correction of intake.

Folate should not be prescribed as the sole response to unexplained macrocytosis before B12 deficiency has been considered. It can improve the anemia while the neurological consequences of B12 deficiency remain untreated. When both deficiencies are present, B12 replacement should begin before or alongside folate. Replacement must be combined with review of alcohol intake, medicines, restrictive diets, and gastrointestinal disease.

Table 1. B12 and Folate Findings

Feature	B12 deficiency	Folate deficiency
Blood film	Megaloblastic changes may occur	Similar changes may occur
Neurological involvement	Peripheral or spinal cord dysfunction	Classic B12-type syndrome is not expected
Methylmalonic acid	May be elevated	Usually not elevated from folate deficiency
Treatment priority	Prompt replacement if neurological disease suspected	Exclude or concurrently treat B12 deficiency
Typical cause	Dietary deficiency or malabsorption	Low intake, increased need or medicines

Etiological Investigation and Long Term Follow Up

Determining the cause changes the duration and route of treatment. Dietary insufficiency, metformin exposure, acid-suppressive therapy, autoimmune gastritis, celiac disease, and gastric or ileal surgery are relevant possibilities. Nitrous oxide exposure deserves a direct history because it can inactivate B12 and produce neurological disease despite a serum level that appears acceptable. Anti-intrinsic factor antibody testing can support autoimmune gastritis, but a negative result does not exclude it when clinical suspicion remains strong [1, 3].

Monitoring should separate hematological recovery from neurological recovery. A reticulocyte response and improving hemoglobin indicate effective marrow treatment; sensory and gait symptoms may improve more slowly and can persist if treatment began late. Rechecking the same serum vitamin level after an injection does not replace assessment of clinical progress.

If symptoms fail to improve, review the diagnosis, route, adherence, and possibility of another neurological disorder. Patients with irreversible malabsorption need an enduring replacement plan rather than repeated short courses. Where metabolic testing is unavailable, careful examination and a credible etiological history become especially valuable. The absence of an advanced assay should not delay treatment of a clinically convincing neurological presentation.

A patient with gait disturbance and sensory loss should not be reassured solely by a normal hemoglobin. Conversely, a slightly reduced B12 concentration in an asymptomatic patient does not explain every unrelated symptom without clinical assessment. The safer interpretation links symptoms to a credible deficiency mechanism and uses additional testing where uncertainty matters. If B12 and folate are both low, treatment should address both while protecting against delay in B12 replacement. The

follow-up appointment should include a brief neurological comparison with baseline, rather than only a review of blood results.

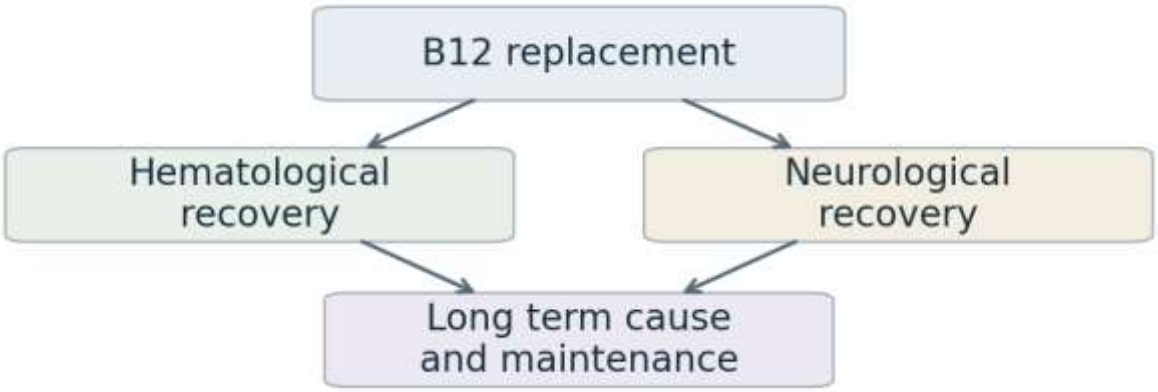


Figure 2. Recovery on Two Tracks

Conclusion

B12 and folate deficiency share a mechanism of impaired DNA synthesis, but neurological risk makes timely recognition of B12 deficiency particularly important. Neither a normal mean corpuscular volume nor absence of anemia safely excludes the diagnosis.

A durable treatment plan links biochemical interpretation to the cause of deficiency, uses an appropriate replacement route, and follows neurological as well as hematological recovery. Folate alone is an inadequate strategy when B12 deficiency remains possible.

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