

# pharmatrac

## Indian Pharma Industry Performance

Mar 2026

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- IPM Therapy Performance
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# Impact of Semaglutide Generics

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## GLP 1 Agonist Market trend post Semaglutide Generics Launch

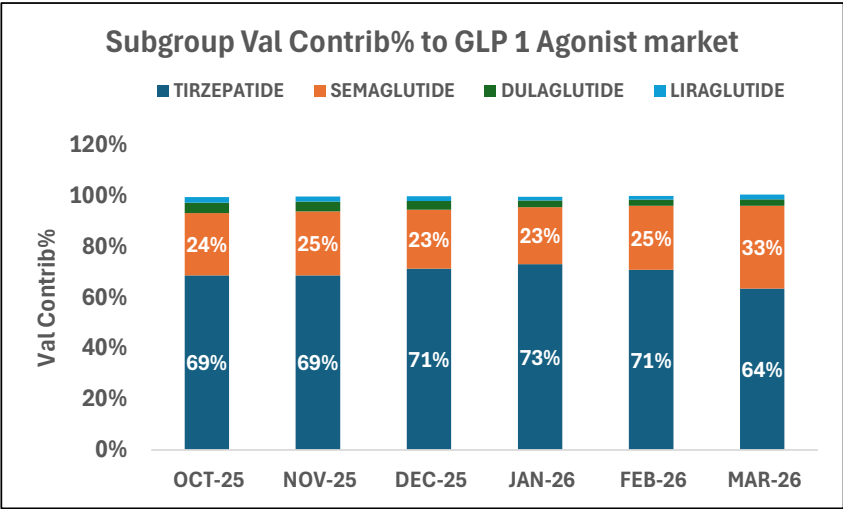
SUBGROUP	MAT MAR VAL IN RS CR				
	2022	2023	2024	2025	2026
<b>GLP1 AGONIST MKT</b>	<b>113</b>	<b>230</b>	<b>428</b>	<b>527</b>	<b>1579</b>
TIRZEPATIDE	0	0	0	8	988
SEMAGLUTIDE	11	112	287	397	474
DULAGLUTIDE	47	60	81	85	72
LIRAGLUTIDE	55	59	61	37	44
LIXISENATIDE	0	0	0	0	0
EXENATIDE	0	0	0	0	0

- GLP 1 agonist market touches ~ Rs. 1600 Cr as per MAT Mar 26
- Though Tirzepatide dominates the segment, it seems to have taken a major hit due to Semaglutide generics launch

### Monthly Val Trend in Rs Cr

SUBGROUP	MTHLY TREND	JAN-25	FEB-25	MAR-25	APR-25	MAY-25	JUN-25	JUL-25	AUG-25	SEP-25	OCT-25	NOV-25	DEC-25	JAN-26	FEB-26	MAR-26	Mar 26 G/L over Feb 26
<b>GLP1 AGONIST MKT</b>		47	46	47	60	66	78	92	134	129	145	157	166	180	191	180↓	-11
TIRZEPATIDE		0	0	8	15	23	37	43	83	80	100	108	118	131	135	114↓	-21
SEMAGLUTIDE		37	37	29	34	32	31	38	40	39	35	40	39	41	48	59↑	10
DULAGLUTIDE		7	7	6	7	7	6	7	7	6	6	6	6	5	5	5	0
LIRAGLUTIDE		3	3	4	4	4	4	5	4	4	4	3	3	3	3	3	0

# Molecular dominance dynamics



- Launch of Branded Generics has made Semaglutide molecule stronger in the GLP 1 Agonist Market
- Generics as well as Innovators in Semaglutide segment are far more economical than Tirzepatide

## Top 10 Players in the Overall GLP1 Agonist Market

COMPANY	Val in Rs Cr.					
	OCT-25	NOV-25	DEC-25	JAN-26	FEB-26	MAR-26
ELI LILLY	69%	69%	63%	63%	61%	56%
NOVO NORDISK	24%	25%	23%	22%	25%	25%
CIPLA	3%	3%	11%	13%	12%	10%
TORRENT						3%
LUPIN	1%	1%	1%	1%	0%	1%
ERIS LS	2%	1%	1%	1%	1%	1%
DR. REDDYS LABS						1%
ZYDUS HEALTHCARE						1%
GLENMARK	1%	1%	1%	1%	1%	1%
SUN PHARMA						1%

- While Eli Lilly has shown a significant value share erosion, Novo Nordisk has managed to hold on better against competitive forces in the GLP 1 segment

## Players in the Semaglutide Generics market

### Players in the Semaglutide market today (26 Brands from 13 Companies)

COMPANY	BRANDS	Val in Rs Cr.					
		OCT-25	NOV-25	DEC-25	JAN-26	FEB-26	MAR-26
<b>SEMAGLUTIDE MARKET</b>		<b>35</b>	<b>40</b>	<b>39</b>	<b>41</b>	<b>48</b>	<b>59</b>
NOVO NORDISK	RYBELSUS, WEGOVY, OZEMPIC	35	40	39	40	47	45
TORRENT	SEMALIX, SEMBOLIC	0	0	0	0	0	4.7
DR. REDDYS LABS	MASHLO, OBEDA, OLIMVIQ	0	0	0	0	0	1.9
ZYDUS HEALTHCARE	ALTERME, MASHEMA, SEMAGLYN	0	0	0	0	0	1.4
LUPIN	LIVARISE, SEMANEXT	0	0	0	0	0	1.4
SUN PHARMA	NOVELTREAT, SEMATRINITY	0	0	0	0	0	0.9
EMCURE PHARMA	POVIZTRA	0	0	0	1	1	0.8
ALKEM	HEPAGLIDE, OBESEMA, SEMASIZE	0	0	0	0	0	0.8
USV	USEMA	0	0	0	0	0	0.7
ERIS LS	BLUVIAL, SUNDAE	0	0	0	0	0	0.6
GLENMARK	GLIPIQ	0	0	0	0	0	0.2
NATCO	SEMAFULL, SEMANAT	0	0	0	0	0	0.2
ABBOTT	EXTENSIOR	0	0	0	0	0	0.1

While many players have ventured into the Semaglutide generics market, it is usually 3-4 players who end up leveraging the branded generics opportunity

*RYBELSUS is oral formulation; SEMALIX and SEMBOLIC are available in both oral and injectable formulations*

## Players in the Semaglutide Generics market

Players in the Semaglutide market today (26 Brands from 13 Companies)

COMPANY	BRANDS	Val Market Share%					
		OCT-25	NOV-25	DEC-25	JAN-26	FEB-26	MAR-26
NOVO NORDISK	RYBELSUS, WEGOVY, OZEMPIC	100%	100%	100%	98%	98%	76%
TORRENT	SEMALIX, SEMBOLIC	0%	0%	0%	0%	0%	8%
DR. REDDYS LABS	MASHLO, OBEDA, OLIMVIQ	0%	0%	0%	0%	0%	3%
ZYDUS HEALTHCARE	ALTERME, MASHEMA, SEMAGLYN	0%	0%	0%	0%	0%	2%
LUPIN	LIVARISE, SEMANEXT	0%	0%	0%	0%	0%	2%
SUN PHARMA	NOVELTREAT, SEMATRINITY	0%	0%	0%	0%	0%	2%
EMCURE PHARMA	POVIZTRA	0%	0%	0%	2%	2%	1%
ALKEM	HEPAGLIDE, OBESEMA, SEMASIZE	0%	0%	0%	0%	0%	1%
USV	USEMA	0%	0%	0%	0%	0%	1%
ERIS LS	BLUVIAL, SUNDAE	0%	0%	0%	0%	0%	1%
GLENMARK	GLIPIQ	0%	0%	0%	0%	0%	0%
NATCO	SEMAFULL, SEMANAT	0%	0%	0%	0%	0%	0%
ABBOTT	EXTENSIOR	0%	0%	0%	0%	0%	0%

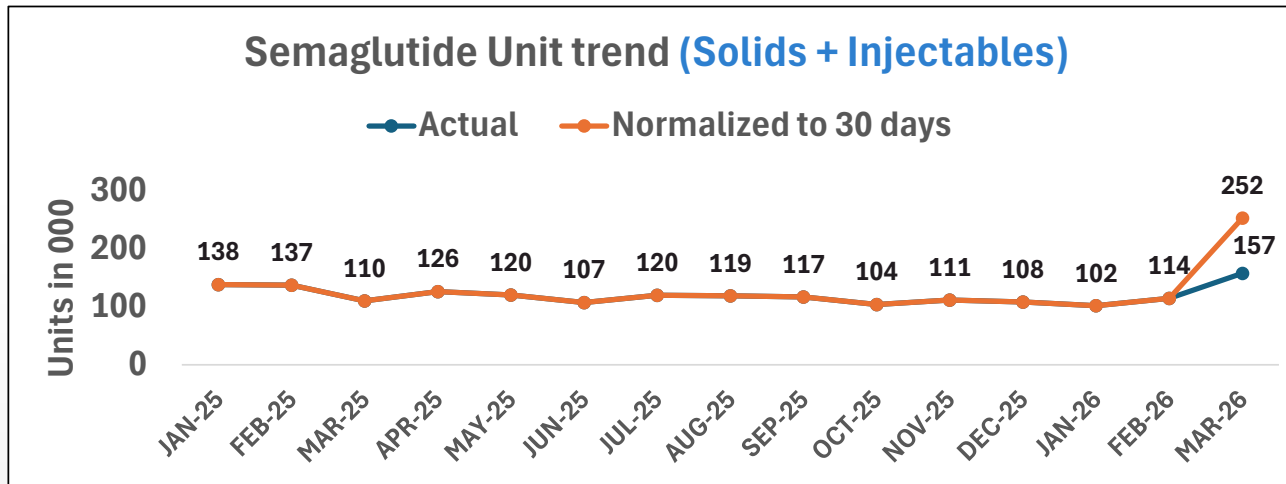
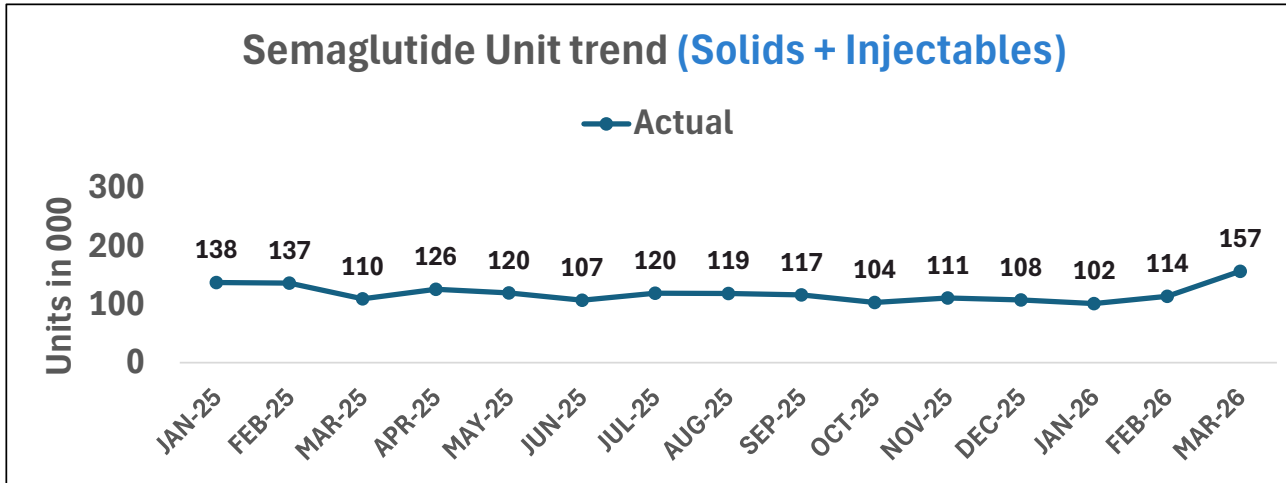
Players have used different strategies to leverage this opportunity in the form of

- Partnerships for manufacture / marketing / delivery device
- Competitive pricing
- Launch in Oral and Injectable forms
- Launch in more than 1-2 divisions
- Multibrand/ Multistrength

*RYBELSUS is oral formulation; SEMALIX and SEMBOLIC are available in both oral and injectable formulations*

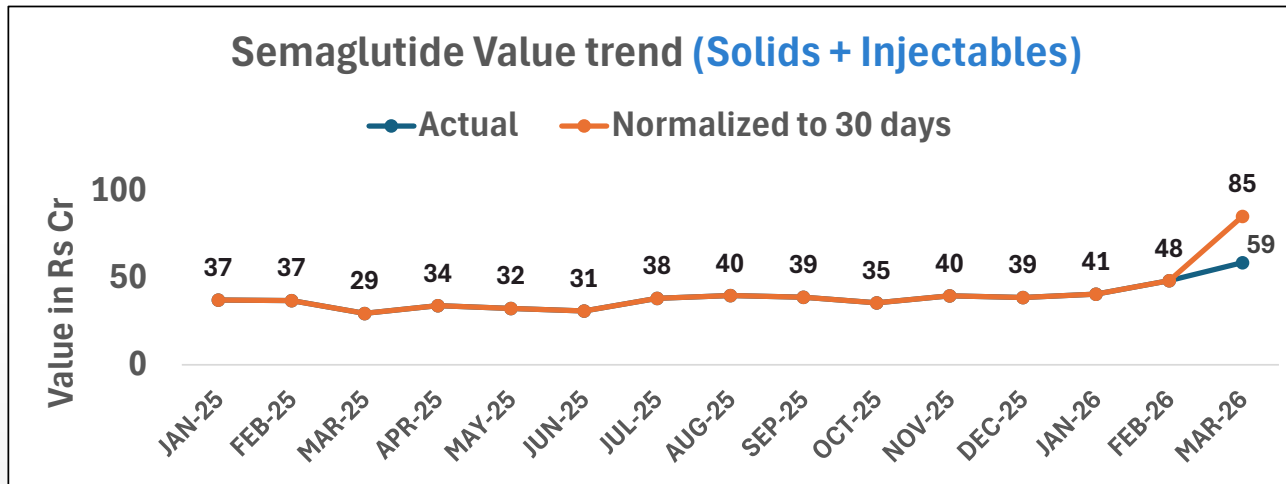
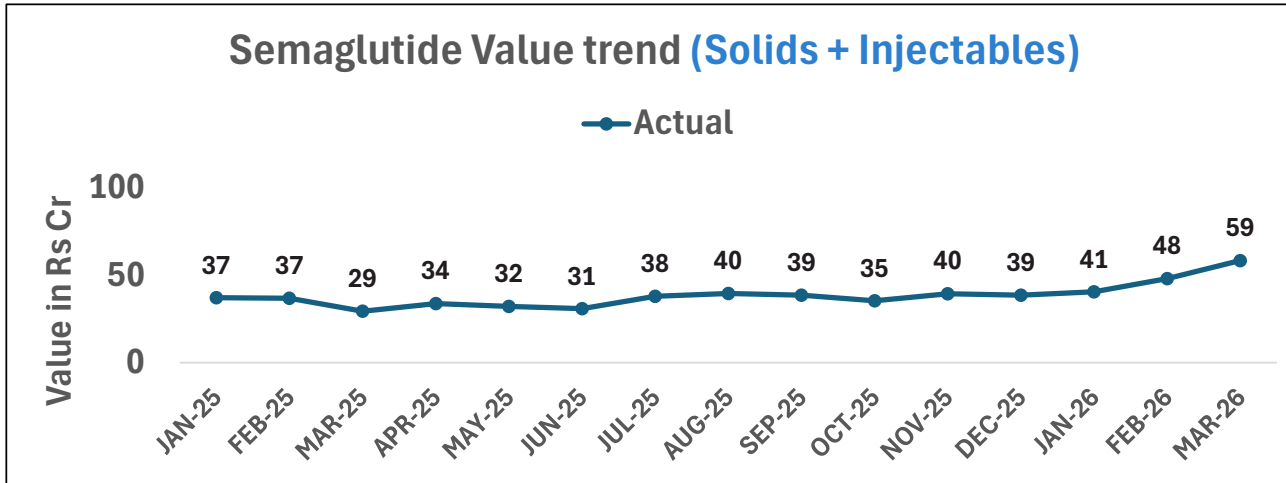
***This is a classic ‘gold rush phase’—participation is high, but value capture will be concentrated***

## Impact of economical generics on Market Unit pick up



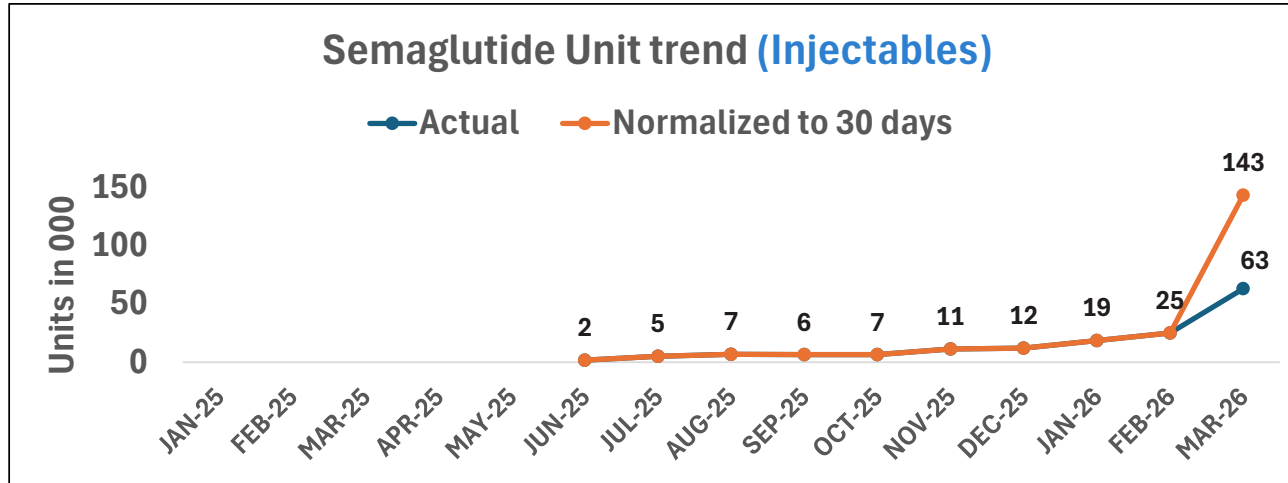
- The current capture of generics is for 10 days (21<sup>st</sup>- 31<sup>st</sup> March)
- Normalized trend multiplies the 10 days sales to 3 to understand what would have been the scenario if it had been a full month impact
- As seen in the past, units sales moves up 2X-3X times for the month once branded generics enter the market.
- The phenomenon stabilizes after 3-4 months
- We may see some more aggressive launches in April 26

## Impact of economical generics on Market Value pick up

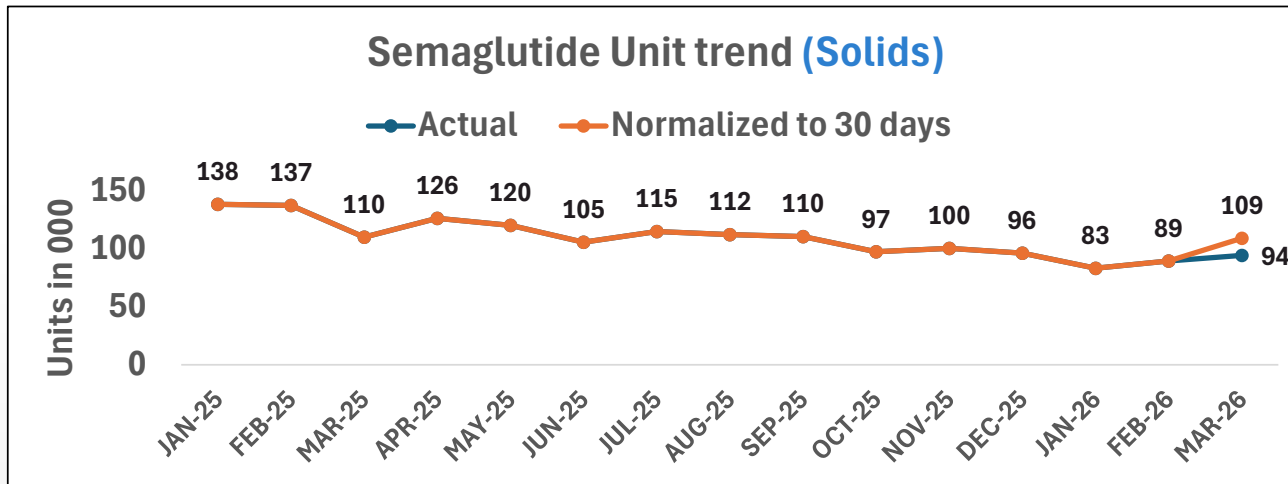


- While the Normalized trend for units shows a >2X jump in units, we do not see the same phenomenon in Value
- Since the pricing is extremely economical, the jump in monthly value is < 2X
- We also need to wait and watch for the impact of stringent government advisories on GLP 1 agonist usage

## Impact of economical generics on Market Unit pick up

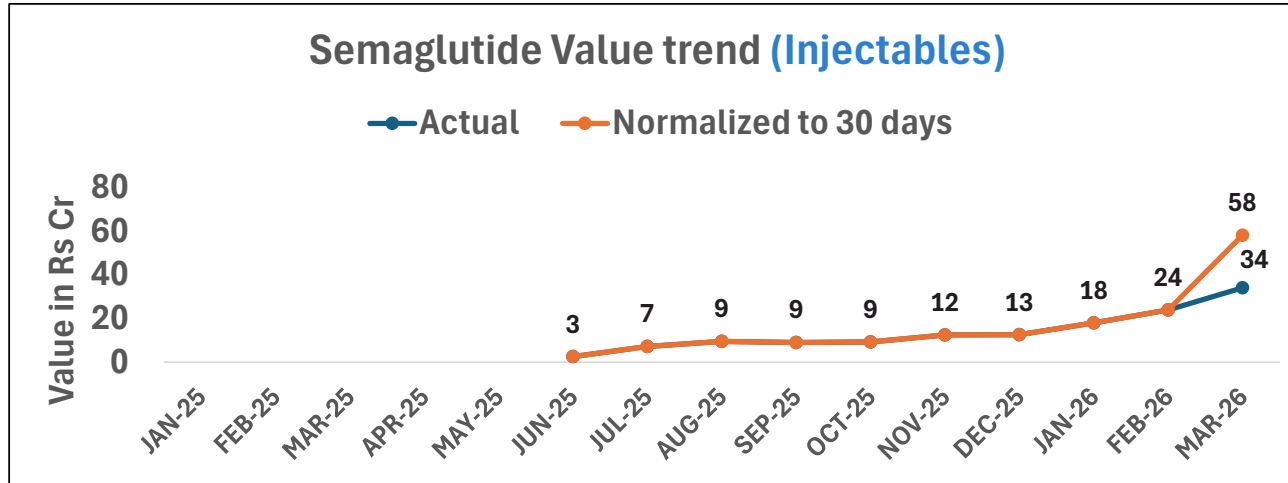


Unit jump for Injectables is almost 6X over Feb 26

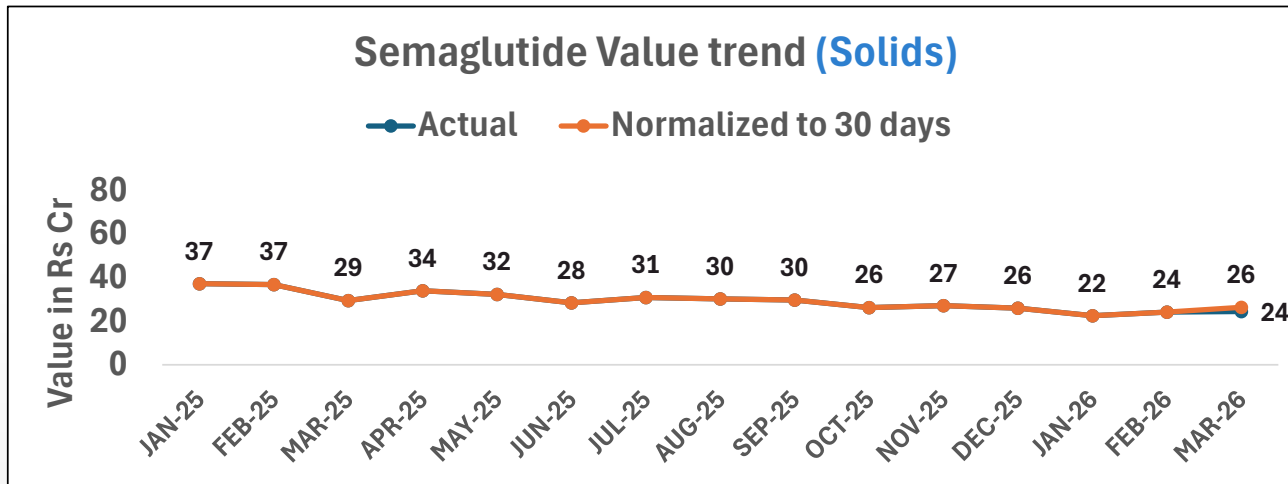


Unit jump for Solids is just 1.2 X over Feb 26

## Impact of economical generics on Market Value pick up

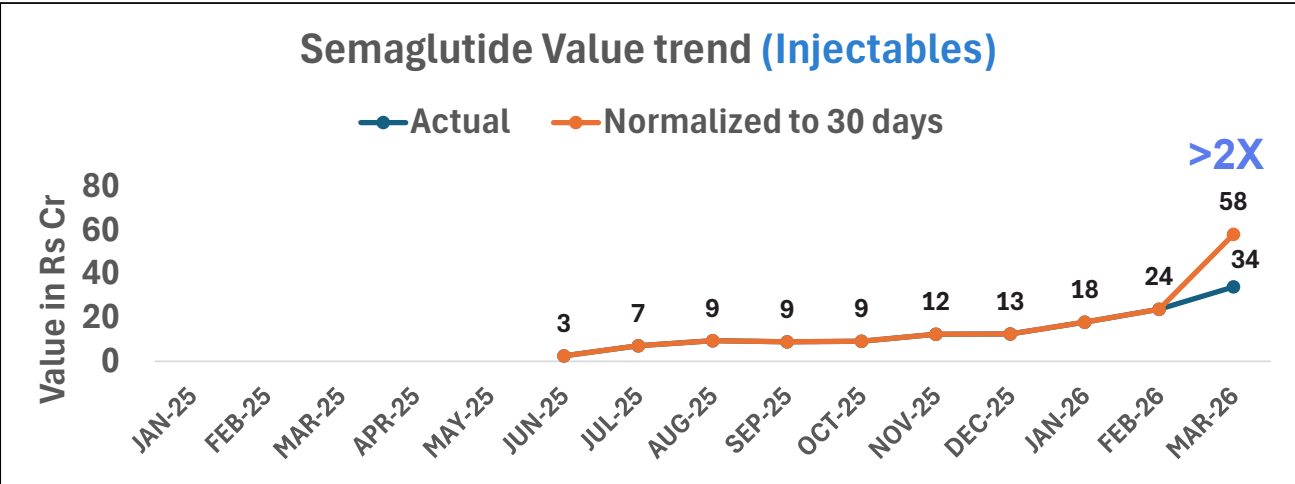
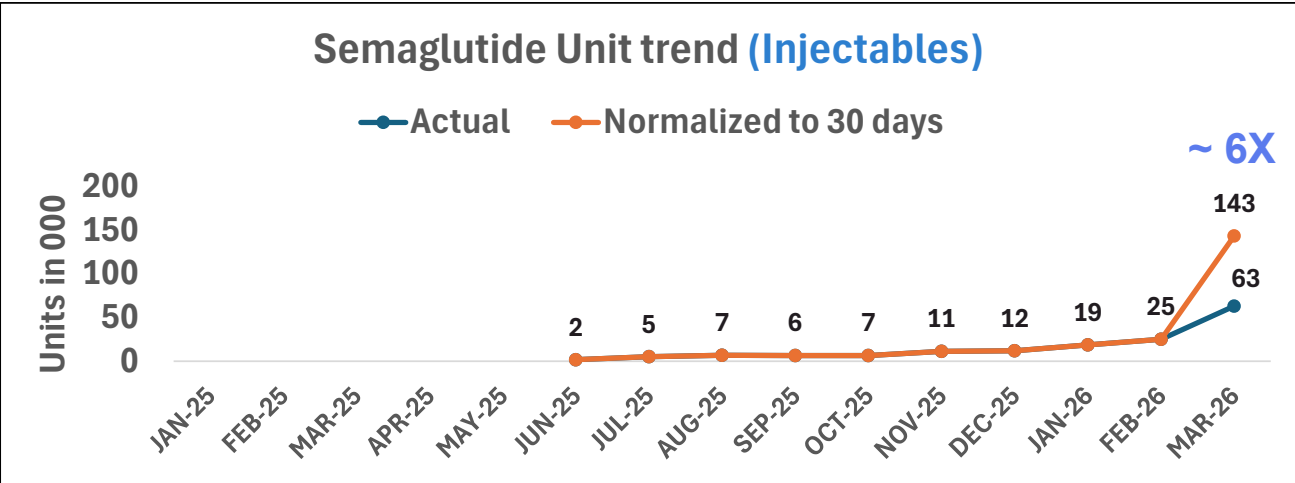


Value jump for Injectables is > 2X over Feb 26



No significant traction on value sales in solids segment

# Phenomenal jump in injectables



### Key Reasons :

- Ease of administration and convenient dosage facilitating adherence
- All Major Companies participating leading to increased share of voice
- Efficacy of molecule proven by Innovators in India
- Affordable pricing strategy by both Generics as well as Innovators

## To Summarize

- Key players in the IPM are all set to leverage the Semaglutide Off patent opportunity. Some more aggressive launches may be seen in the next few days. Exponential growth phenomenon may be repeated for the month of April 26 as well.
- Despite the tough generics onslaught, Novo Nordisk has maintained its ground well in the initial phase. Innovator driven efficacy, increased share of voice due to partnerships with Emcure & Abbott and bringing the pricing at par with some key generics may play a significant role in future for the Innovator.
- Government advisories may add cautionary notes in prescription and administration of Semaglutide to eligible patients only.
- However, misuse / unwanted use may be difficult to arrest. Regulations may refine the market, but is unlikely to derail the growth trajectory in the initial months of Generics launches.

# IPM Therapy Performance

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## IPM Therapy Performance

The IPM has shown a Value growth of 10.1% with all the therapies showing a positive Value growth.

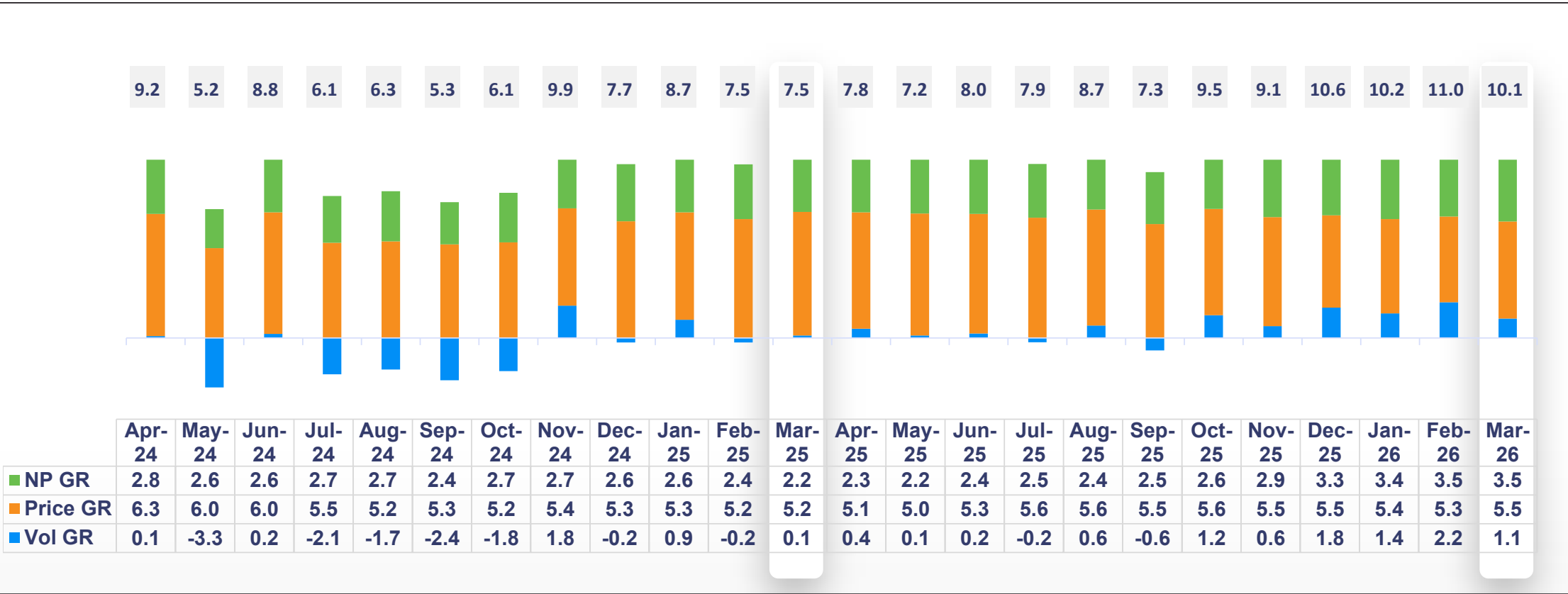
SUPER GROUP	MAT Mar'26				MTH Mar'26			
	SALES VAL	CONT%	VAL GR%	UNIT GR%	SALES VAL	CONT%	VAL GR%	UNIT GR%
<b>IPM</b>	<b>245943</b>	<b>100%</b>	<b>8.6%</b>	<b>0.6%</b>	<b>20012</b>	<b>100%</b>	<b>10.1%</b>	<b>0.1%</b>
CARDIAC	34297	14%	14.0%	5.3%	2881	14%	14.6%	4.7%
GASTRO INTESTINAL	28894	12%	4.1%	-4.9%	2320	12%	4.3%	-7.5%
ANTI-INFECTIVES	27821	11%	5.4%	-1.6%	2121	11%	4.0%	-4.5%
ANTI DIABETIC	23051	9%	11.3%	2.8%	1917	10%	15.5%	1.8%
VIT / MIN / NUT	21845	9%	6.9%	-0.6%	1772	9%	10.9%	2.6%
RESPIRATORY	19270	8%	11.2%	7.9%	1586	8%	10.7%	4.8%
PAIN / ANALGESICS	16757	7%	6.5%	-2.2%	1338	7%	8.7%	0.1%
NEURO / CNS	16580	7%	10.1%	0.9%	1374	7%	11.6%	3.5%
DERMA	15923	6%	7.5%	-0.7%	1284	6%	9.5%	-0.2%
GYNAECOLOGICAL	7781	3%	7.6%	1.3%	644	3%	11.9%	4.5%
BLOOD RELATED	7260	3%	7.2%	-0.5%	592	3%	11.5%	5.1%
ANTI-NEOPLASTICS	5810	2%	8.8%	11.1%	486	2%	12.4%	17.2%
OPHTHAL / OTOLOGICALS	4538	2%	6.2%	1.0%	368	2%	7.4%	-0.2%
UROLOGY	4424	2%	15.2%	6.3%	359	2%	12.8%	5.3%
HORMONES	3933	2%	6.8%	-2.0%	321	2%	7.1%	-5.8%
VACCINES	2434	1%	20.1%	11.5%	210	1%	22.7%	37.4%
STOMATOLOGICALS	1696	1%	8.7%	-0.8%	138	1%	11.3%	1.5%
OTHERS	1680	1%	7.9%	10.3%	146	1%	8.6%	6.5%
SEX STIMULANTS / REJUV	1294	1%	4.8%	-2.7%	109	1%	11.2%	3.7%
ANTI MALARIALS	654	0%	1.9%	4.0%	45	0%	-1.1%	-6.5%

# Growth Drivers

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IPM Monthly Growth Drivers

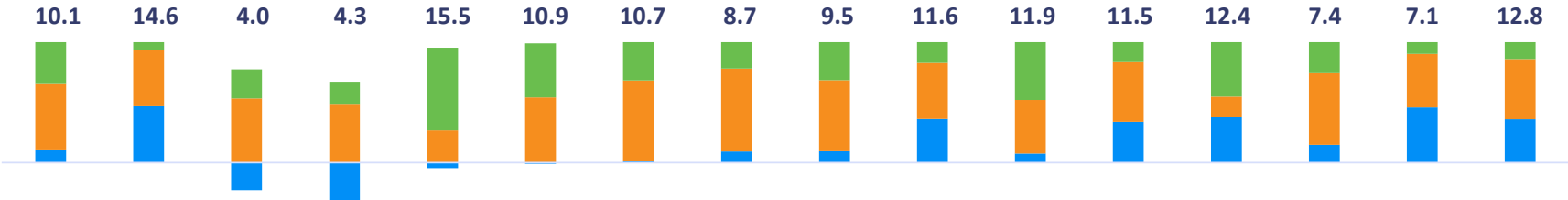
All the three levers of growth stay positive for the month of Mar 26



Therapy Growth Drivers

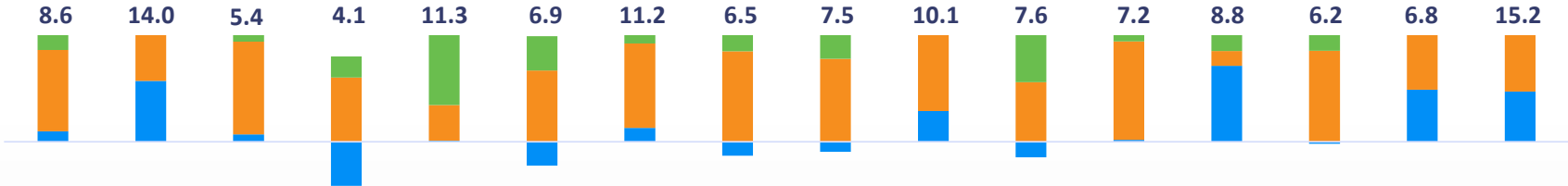
Majority of the top therapies, except Anti-infectives and Gastro-intestinals, have positive performance across all the three levels of growth

**MAR 26 MTH GROWTH DRIVERS**



	IPM	CARDIAC	ANTI-INF	GASTRO	ANTI-DIAB	VIT/MIN/NUTR	RESPI	PAIN/ANAL	DERMA	NEURO / CNS	GYNAEC	BLOOD REL	ANTI-NEOP	OPTH/OTOL	HORMONES	UROLOGY
NP GR	3.5	1.0	1.8	2.3	11.7	5.0	3.4	1.9	3.0	2.0	5.7	1.9	5.6	1.9	0.7	1.8
Price GR	5.5	6.7	4.0	6.1	4.6	6.0	7.1	6.0	5.6	5.4	5.3	5.7	2.1	4.4	3.2	6.4
Vol GR	1.1	7.0	-1.7	-4.1	-0.8	-0.1	0.2	0.8	0.9	4.2	0.9	3.9	4.7	1.1	3.3	4.6

**MAR 26 MAT GROWTH DRIVERS**



	IPM	CARDIAC	ANTI-INF	GASTRO	ANTI-DIAB	VIT/MIN/NUTR	RESPI	PAIN/ANAL	DERMA	NEURO / CNS	GYNAEC	BLOOD REL	ANTI-NEOP	OPTH/OTOL	HORMONES	UROLOGY
NP GR	2.5	0.7	1.2	2.1	8.1	2.9	2.7	1.6	2.5	1.7	4.2	1.6	2.6	1.8	1.1	1.9
Price GR	5.4	6.7	3.8	6.4	3.1	6.0	7.3	5.8	5.7	6.0	4.6	5.4	1.0	4.5	2.9	7.4
Vol GR	0.7	6.6	0.3	-4.4	0.1	-2.0	1.2	-0.9	-0.7	2.4	-1.2	0.1	5.1	-0.1	2.7	5.9

# Top 40 Corporates

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## Top Corporates Rank 1 - 20

For the month of Mar 26 majority of the top players have shown an encouraging Value growth.

CORPORATE	MAT Mar'26					MTH Mar'26				
	SALES VAL	RANK	CONT%	VAL GR%	UNIT GR%	SALES VAL	RANK	CONT%	VAL GR%	UNIT GR%
<b>IPM</b>	<b>245943</b>		<b>100%</b>	<b>8.6%</b>	<b>0.6%</b>	<b>20012</b>		<b>100%</b>	<b>10.1%</b>	<b>0.1%</b>
SUN*	20776	1	8.4%	12.6%	3.4%	1703	1	8.5%	12.4%	4.3%
ABBOTT*	14498	2	5.9%	5.6%	1.7%	1158	3	5.8%	9.9%	4.1%
CIPLA	14421	3	5.9%	9.0%	7.1%	1191	2	6.0%	14.7%	10.5%
MANKIND*	13549	4	5.5%	5.6%	0.9%	1084	4	5.4%	6.7%	1.3%
TORRENT	11931	5	4.9%	12.1%	-1.3%	980	5	4.9%	10.5%	-4.2%
ALKEM*	10134	6	4.1%	10.3%	1.6%	801	7	4.0%	8.9%	-2.6%
INTAS	9751	7	4.0%	12.7%	4.4%	829	6	4.1%	14.4%	4.4%
LUPIN	8635	8	3.5%	10.1%	0.7%	700	8	3.5%	10.4%	-2.4%
DR. REDDYS	7789	9	3.2%	11.2%	-0.1%	627	10	3.1%	10.8%	-2.1%
ZYDUS*	7776	10	3.2%	10.2%	-3.5%	669	9	3.3%	13.4%	-12.8%
MACLEODS	7379	11	3.0%	8.6%	3.6%	597	11	3.0%	13.8%	7.9%
ARISTO	6921	12	2.8%	7.1%	-0.2%	558	12	2.8%	8.6%	1.7%
EMCURE*	6037	13	2.5%	1.5%	0.4%	446	13	2.2%	-1.6%	-13.4%
GSK	5163	14	2.1%	7.4%	-4.0%	433	14	2.2%	7.3%	-6.1%
GLENMARK	5115	15	2.1%	13.0%	3.7%	421	15	2.1%	13.4%	3.2%
USV	5008	16	2.0%	11.2%	3.4%	410	16	2.0%	11.1%	2.4%
IPCA	4773	17	1.9%	10.7%	4.5%	392	17	2.0%	13.0%	7.4%
MICRO	3968	18	1.6%	4.0%	-1.6%	311	18	1.6%	5.9%	-2.8%
ERIS LS*	3078	19	1.3%	9.2%	0.2%	258	19	1.3%	10.3%	-5.5%
ALEMBIC	2798	20	1.1%	-2.2%	-8.6%	195	21	1.0%	-6.6%	-15.4%

Top Corporates Rank 21 – 40

For the month of Mar 26 majority of the top players have shown an encouraging Value growth.

CORPORATE	MAT Mar'26					MTH Mar'26				
	SALES VAL	RANK	CONT%	VAL GR%	UNIT GR%	SALES VAL	RANK	CONT%	VAL GR%	UNIT GR%
<b>IPM</b>	<b>245943</b>		<b>100%</b>	<b>8.6%</b>	<b>0.6%</b>	<b>20012</b>		<b>100%</b>	<b>10.1%</b>	<b>0.1%</b>
PFIZER*	2624	21	1.1%	4.9%	-6.6%	213	20	1.1%	9.3%	-5.8%
FDC	2057	22	0.8%	3.5%	-5.1%	159	25	0.8%	2.5%	-11.6%
LA RENON	2014	23	0.8%	16.4%	5.0%	177	22	0.9%	15.3%	5.1%
SANOFI INDIA	1956	24	0.8%	6.3%	14.2%	167	23	0.8%	10.9%	5.3%
AJANTA	1954	25	0.8%	13.0%	6.6%	162	24	0.8%	16.4%	9.0%
HIMALAYA	1709	26	0.7%	2.3%	-12.4%	150	26	0.8%	1.8%	-9.1%
CORONA	1640	27	0.7%	17.2%	7.8%	137	27	0.7%	14.8%	-2.7%
PROCTER AND GAMBLE	1548	28	0.6%	8.8%	0.9%	134	28	0.7%	16.0%	7.1%
INDOCO	1412	29	0.6%	7.8%	-1.1%	107	31	0.5%	2.5%	-3.0%
FRANCO	1351	30	0.5%	5.5%	1.4%	107	32	0.5%	4.6%	-8.2%
BAYER	1331	31	0.5%	10.6%	-12.8%	116	29	0.6%	13.5%	-7.5%
SYSTOPIC	1253	32	0.5%	8.2%	4.7%	103	34	0.5%	11.9%	6.9%
CADILA	1253	33	0.5%	-6.6%	-16.6%	101	35	0.5%	3.7%	6.1%
NUTRICIA	1219	34	0.5%	13.7%	3.9%	111	30	0.6%	16.1%	-0.8%
HETERO	1213	35	0.5%	6.9%	-3.6%	94	38	0.5%	3.8%	2.5%
BLUE CROSS	1208	36	0.5%	5.0%	-0.3%	91	39	0.5%	6.6%	0.9%
FOURRTS	1138	37	0.5%	10.8%	5.5%	100	36	0.5%	7.9%	-2.1%
ELI LILLY	1086	38	0.4%	217.6%	-8.2%	104	33	0.5%	253.2%	-45.5%
HEGDE & HEGDE	1078	39	0.4%	-0.5%	-4.0%	87	40	0.4%	5.7%	-1.6%
MEDLEY	1074	40	0.4%	4.8%	-3.4%	82	41	0.4%	8.6%	-0.7%

# Top 40 Brands

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## Top Brands Rank 1-20

Mounjaro Stands at No 1 position at MAT as well as MTH level.

Augmentin and Glycomet GP move to No 2 and 3 positions respectively at MAT level

CORPORATE	BRANDS	MAT Mar'26				MTH Mar'26			
		SALES VAL	RANK	VAL GR%	UNIT GR%	SALES VAL	RANK	VAL GR%	UNIT GR%
ELI LILLY	MOUNJARO	923	1	12106%	4625.5%	100	1	1222.6%	205.9%
GSK	AUGMENTIN	916	2	12.3%	9.1%	76	3	9.0%	5.3%
USV	GLYCOMET GP	898	3	11.8%	1.1%	73	4	8.2%	-3.1%
CIPLA	FORACORT	844	4	7.2%	1.3%	83	2	31.7%	10.6%
ALKEM*	PAN	832	5	7.5%	0.4%	70	5	1.7%	-1.9%
ABBOTT* (NOVO)	MIXTARD	802	6	3.9%	12.0%	58	9	6.9%	24.3%
HIMALAYA	LIV.52	725	7	-0.8%	-17.6%	63	7	-8.4%	-20.8%
IPCA	ZERODOL SP	716	8	13.1%	6.0%	64	6	22.0%	13.9%
ALKEM*	CLAVAM	714	9	9.6%	4.5%	60	8	8.8%	1.7%
ALKEM*	PAN D	697	10	7.5%	-2.2%	57	10	0.3%	-8.8%
ARISTO	MONOCEF	679	11	3.9%	2.5%	51	12	6.9%	5.3%
ABBOTT*	UDILIV	654	12	3.9%	-5.3%	52	11	5.8%	-3.6%
ABBOTT*	THYRONORM	616	13	14.3%	12.0%	50	13	15.1%	12.6%
CIPLA	DUOLIN	605	14	12.0%	9.4%	49	15	12.6%	3.9%
TORRENT	CILACAR	579	15	23.5%	13.7%	49	14	28.8%	18.2%
WIN-MEDICARE	BETADINE	572	16	3.0%	-2.4%	48	16	14.0%	9.9%
GLENMARK	TELMA	565	17	15.0%	16.6%	44	20	0.6%	2.0%
ABBOTT* (NOVO)	RYZODEG	558	18	-5.3%	-4.8%	47	18	-7.9%	-8.1%
CIPLA	BUDECORT	531	19	12.1%	11.0%	47	17	30.7%	29.4%
USV	ECOSPRIN AV	529	20	18.1%	0.8%	46	19	23.0%	-1.1%

Levipil, Lantus, Rosuvas, Brilinta, Dytor and Vertin show a robust double-digit Val and Unit Gr%

CORPORATE	BRANDS	MAT Mar'26				MTH Mar'26			
		SALES VAL	RANK	VAL GR%	UNIT GR%	SALES VAL	RANK	VAL GR%	UNIT GR%
MANKIND*	MANFORCE	523	21	1.0%	0.4%	43	21	9.7%	8.5%
SUN*	LEVIPIL	494	22	12.9%	10.2%	41	22	13.3%	11.1%
JANSSEN	ULTRACET	493	23	2.8%	-5.1%	35	29	-5.9%	-7.0%
SANOFI INDIA	LANTUS	489	24	15.2%	14.7%	39	24	15.0%	13.4%
FRANCO	DEXORANGE	488	25	4.1%	-6.0%	39	23	9.2%	-1.5%
FDC	ELECTRAL	450	26	-7.5%	-6.4%	38	26	-12.4%	-8.7%
SUN*	ROSUVAS	441	27	0.6%	-5.4%	38	27	18.3%	10.6%
ASTRAZENECA	BRILINTA	437	28	31.3%	22.3%	38	25	27.8%	32.0%
ARISTO	PANTOP	428	29	3.4%	0.6%	35	30	5.8%	4.0%
CIPLA	DYTOR	419	30	22.1%	11.2%	34	31	25.4%	17.0%
ABBOTT*	VERTIN	410	31	20.9%	7.0%	37	28	32.1%	18.4%
APEX	ZINCOVIT	408	32	4.1%	-3.0%	33	36	2.0%	-8.3%
GSK	CALPOL	406	33	-2.2%	-1.8%	33	35	11.0%	9.5%
GSK	T BACT	381	34	10.0%	6.8%	32	40	9.9%	5.0%
SUN*	GEMER	380	35	10.9%	1.8%	32	37	17.4%	8.5%
INTAS	LEVERA	378	36	11.2%	7.8%	33	34	11.0%	7.4%
MICRO	DOLO	377	37	-4.9%	-6.4%	26	65	-12.5%	-14.2%
ARISTO	MIKACIN	374	38	-1.1%	-6.0%	29	50	7.3%	-0.8%
TORRENT	CHYMORAL FORTE	373	39	11.4%	5.1%	31	41	7.6%	-1.7%
NUTRICIA	DEXOLAC 1	371	40	14.9%	5.4%	31	44	3.2%	-6.7%

## To Summarize

- The IPM has shown a Value growth of 10.1% with all the therapies showing a positive Value growth.
- All the three levers of growth are positive for the month of Mar 26
- For the month of Mar 26 majority of the Top players have shown an encouraging Value growth
- Mounjaro Stands at No 1 position at MAT as well as MTH level.  
Augmentin and Glycomet GP move to No 2 and 3 position respectively at MAT level