

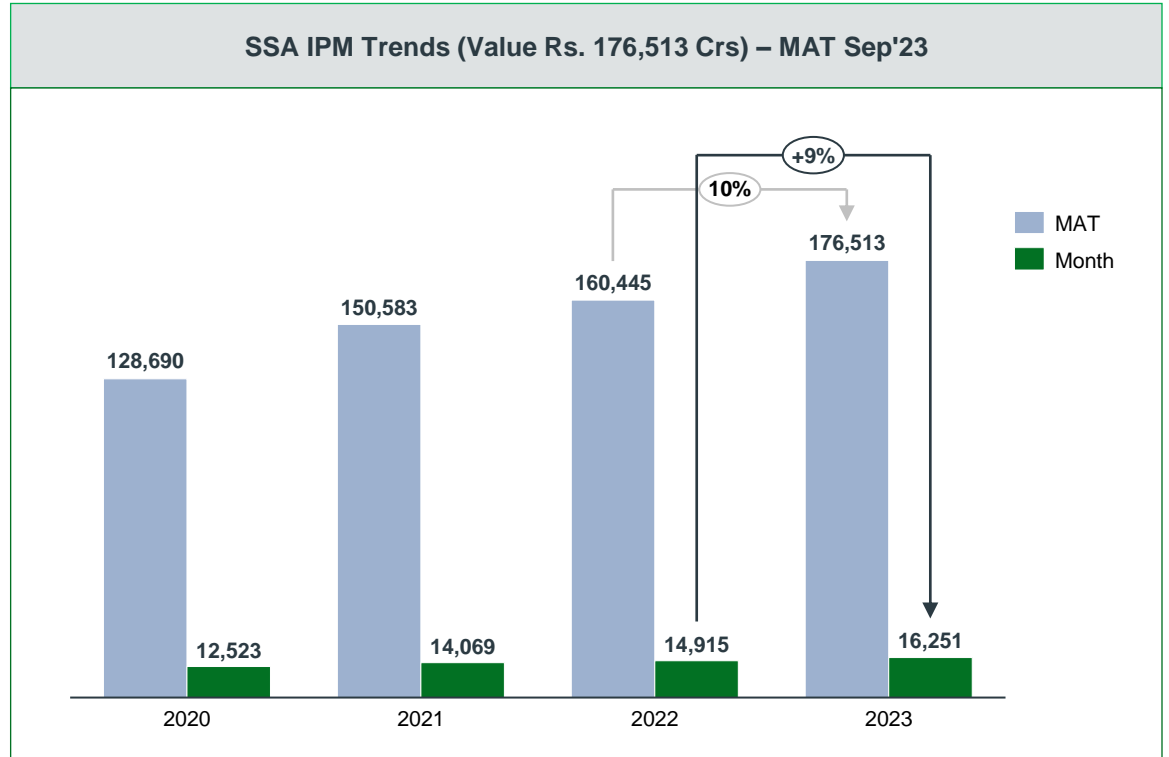
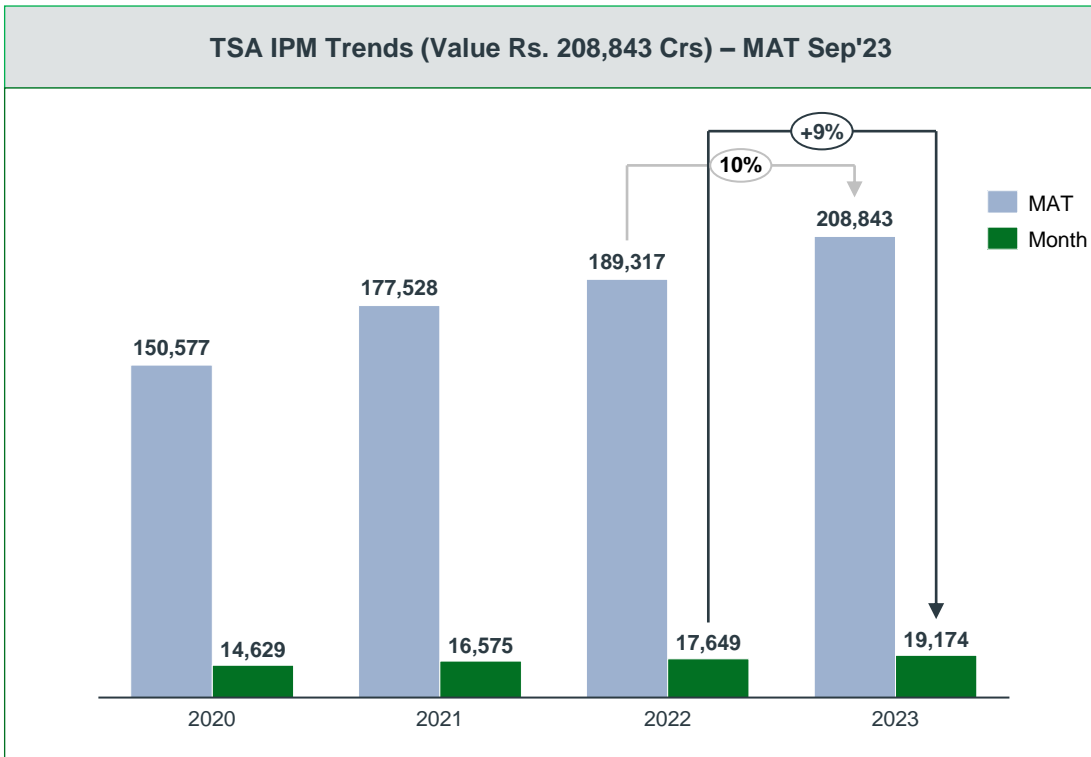
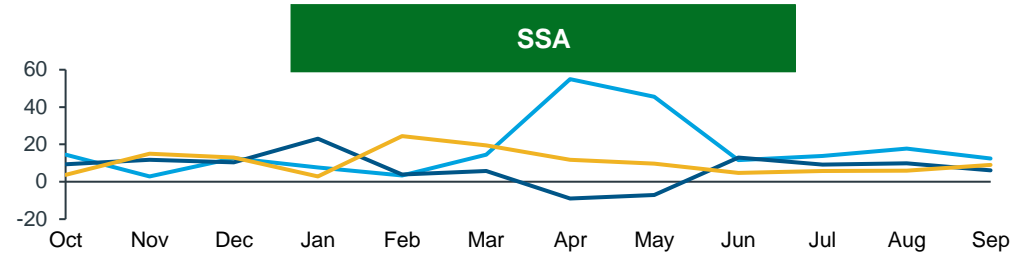
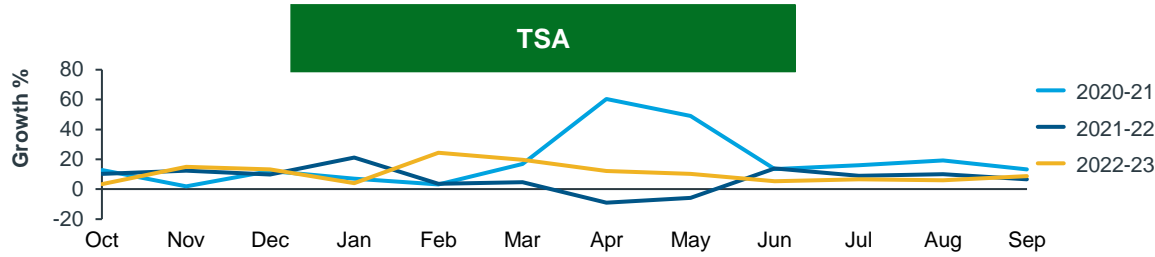


IQVIA **Market Reflection Report**

Sep 2023

10th October

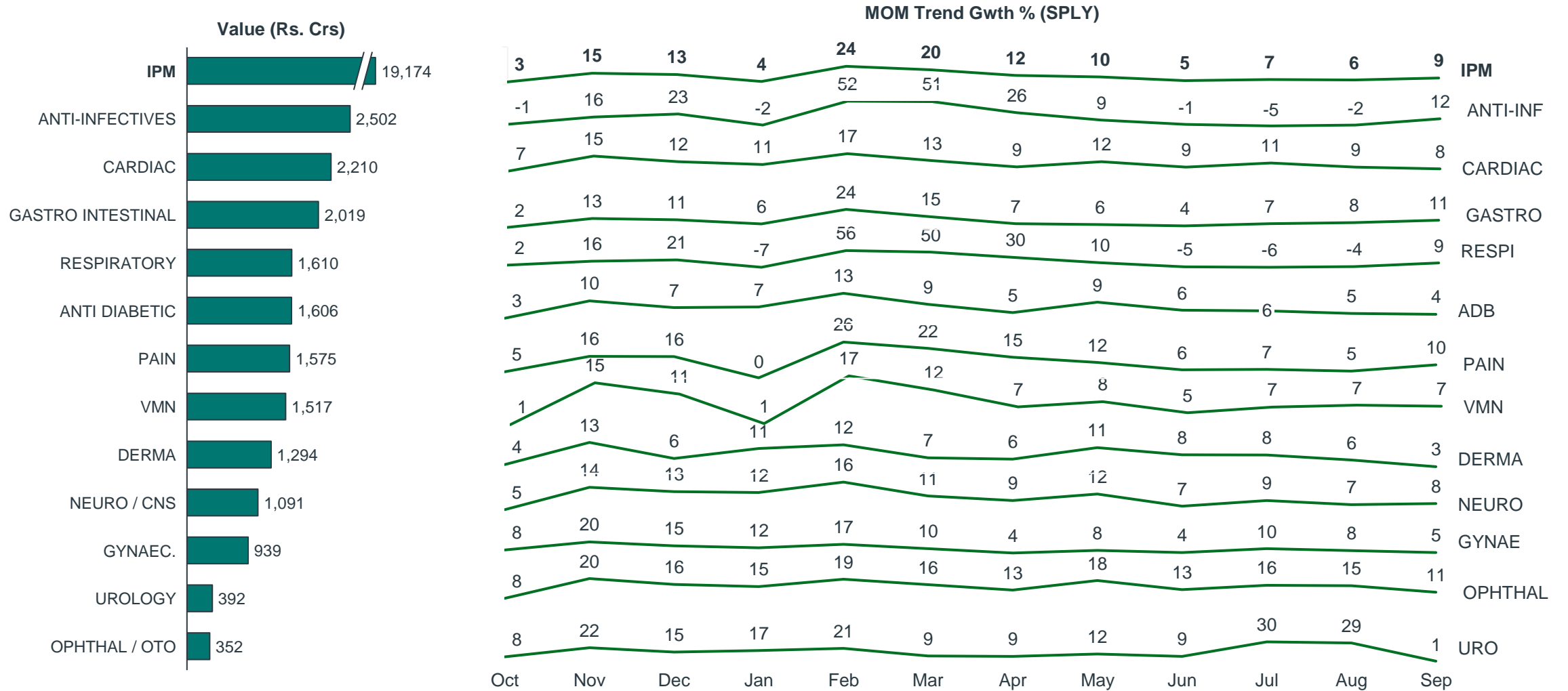
IPM Overview



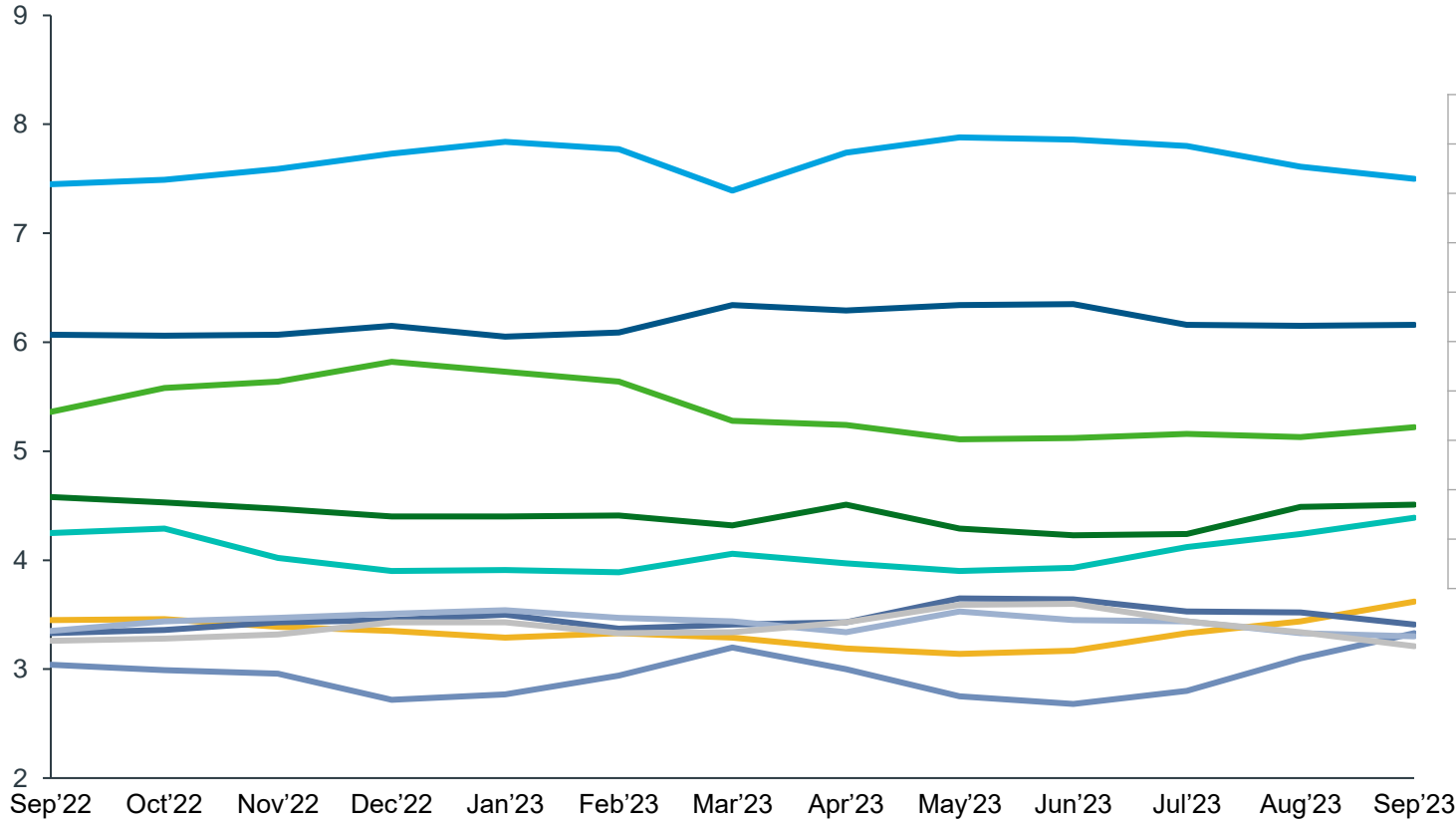
- TSA valued at Rs. 208,843 Cr with growth of 10% as of MAT Sep'23 and Rs 19,174 Cr for Sep'23 month with growth of 9%
- SSA valued at Rs. 176,513 Cr with growth of 10% as of MAT Sep'23 and Rs 16,251 Cr for Sep'23 month with growth of 9%

AI followed by Gastro posted highest growth

TSA



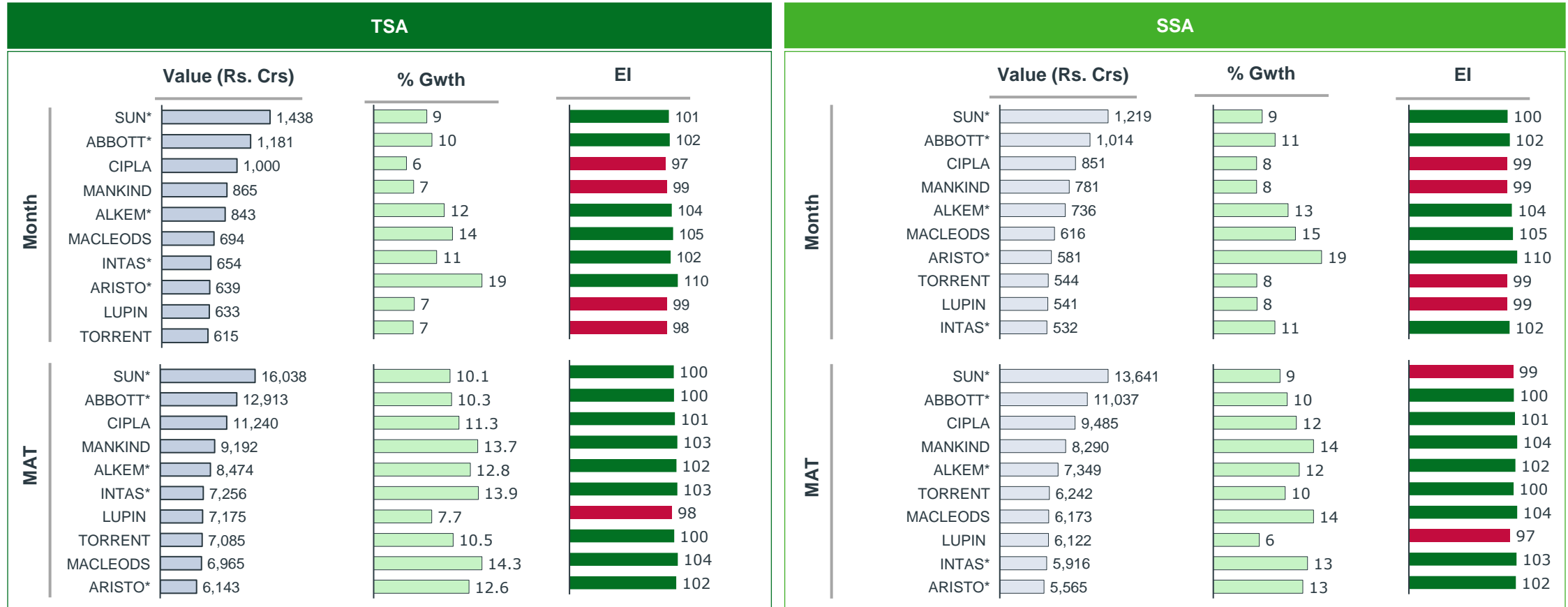
Top Companies #1-10 Market Share Trend



	Val Sep'23	MS Sep'23
(SUN*)	1,438	7.50
ABBOTT*	1,181	6.16
CIPLA	1,000	5.22
MANKIND	865	4.51
ALKEM*	843	4.39
MACLEODS	694	3.62
(INTAS*)	654	3.41
ARISTO*	639	3.33
(LUPIN)	633	3.30
(TORRENT)	615	3.21

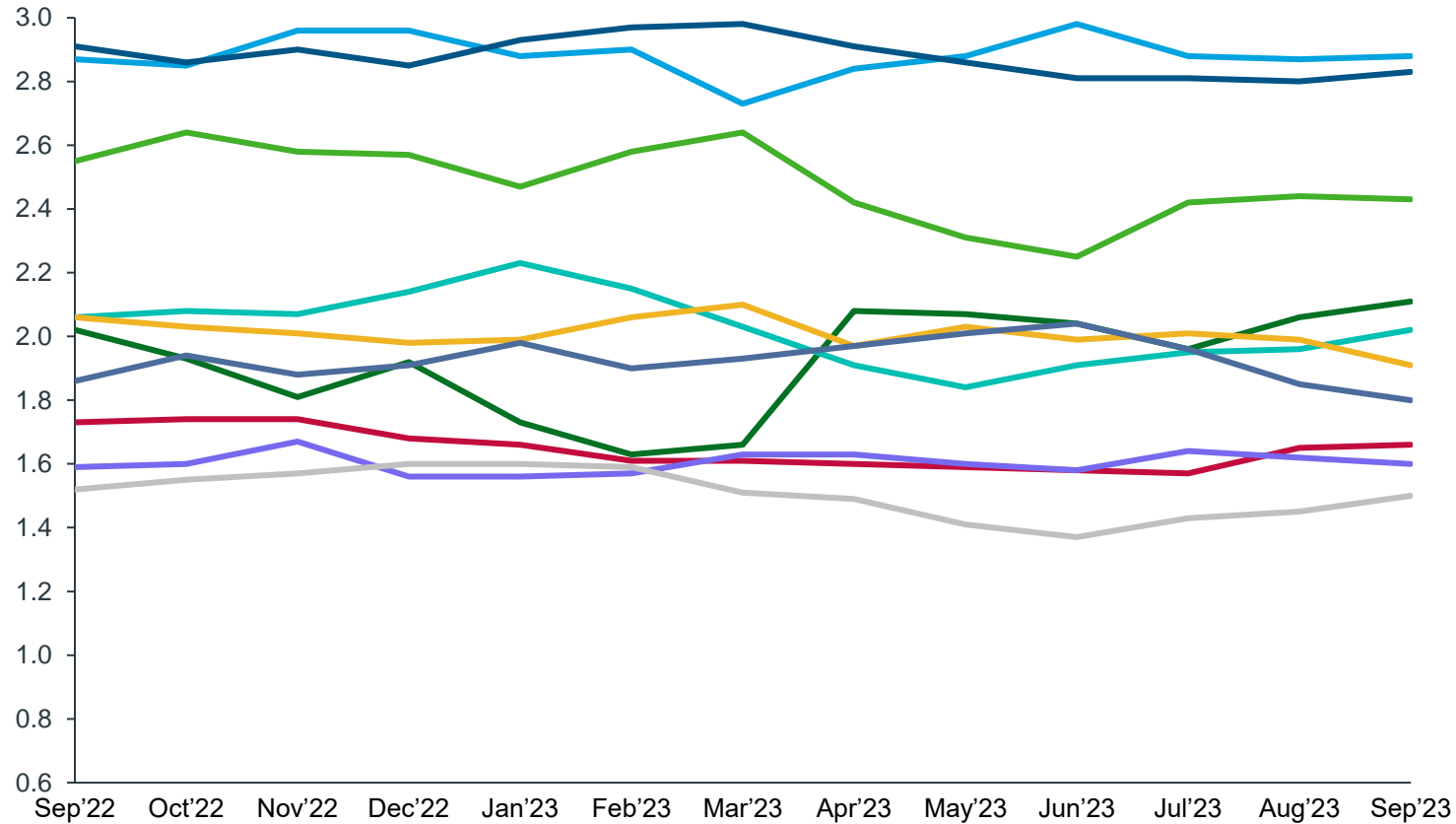
- Abbott*, Cipla, Mankind, Alkem*, Macleods & Aristo* have shown improvement in MS for Sep'23 as compared to Aug'23
- Sun*, Intas*, Lupin & Torrent have reflected dip in MS for Sep'23 as compared to Aug'23

Top Companies #1-10



- **TSA** : Aristo* has posted highest growth followed by Macleods on Month level, while on MAT level, Macleods followed by Intas* are fastest growing
- **SSA** : Aristo* has posted highest growth followed by Macleods on Month level, while on MAT level, Mankind & Macleods are fastest growing

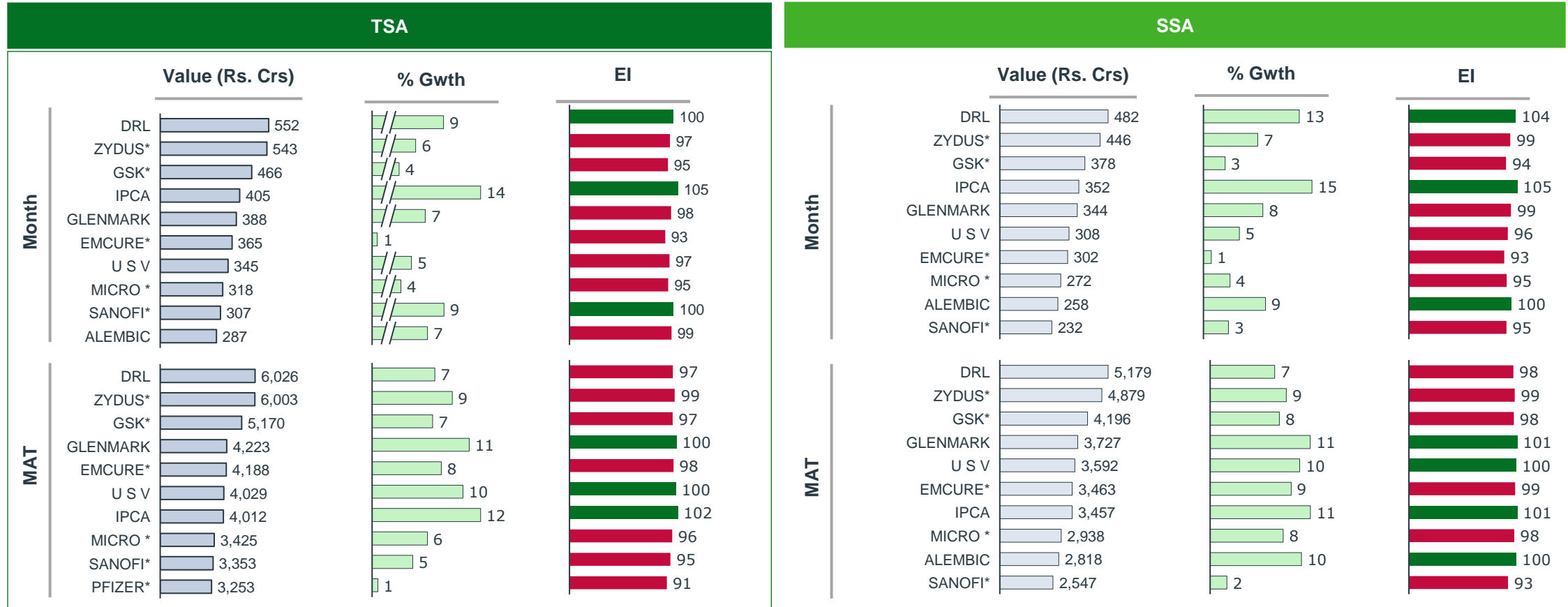
Top Companies #11-20 Market Share Trend



	Val Sep'23	MS Sep'23
DRL	552	2.88
ZYDUS*	543	2.83
(GSK*)	466	2.43
IPCA	405	2.11
GLENMARK	388	2.02
(EMCURE*)	365	1.91
(U S V)	345	1.80
MICRO *	318	1.66
(SANOFI*)	307	1.60
ALEMBIC	287	1.50

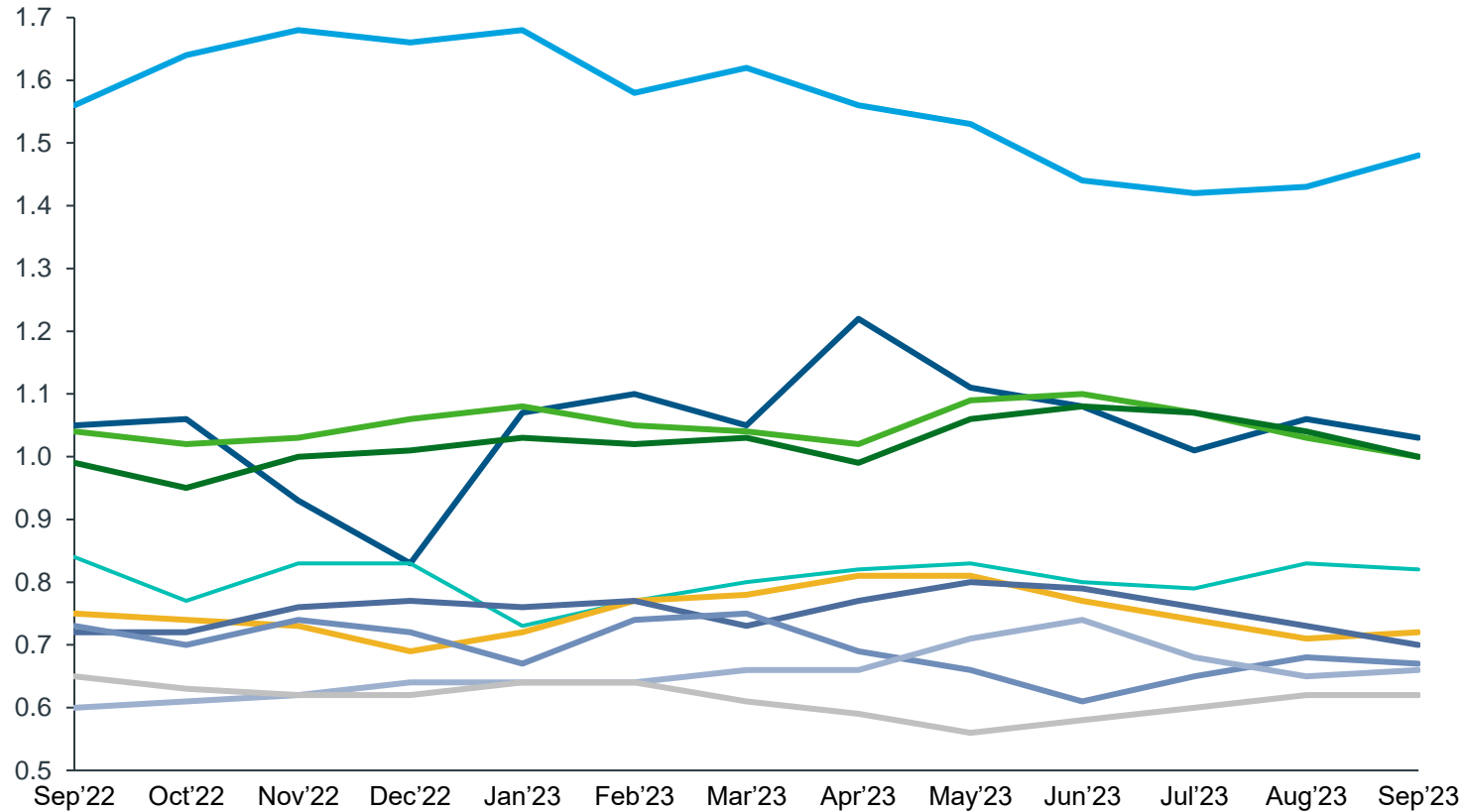
- DRL, Zydus*, IPCA, Glenmark, Micro* & Alembic have shown improvement in MS for Sep'23 as compared to Aug'23
- GSK*, Emcure*, USV & Sanofi* have reflected dip in MS for Sep'23 as compared to Aug'23

Top Companies #11-20



- **TSA** : IPCA has posted the highest growth on month level, and for MAT, IPCA followed by Glenmark posted highest growth
- **SSA** : IPCA has posted the highest growth on month level and for MAT, IPCA & Glenmark have reflected highest growth

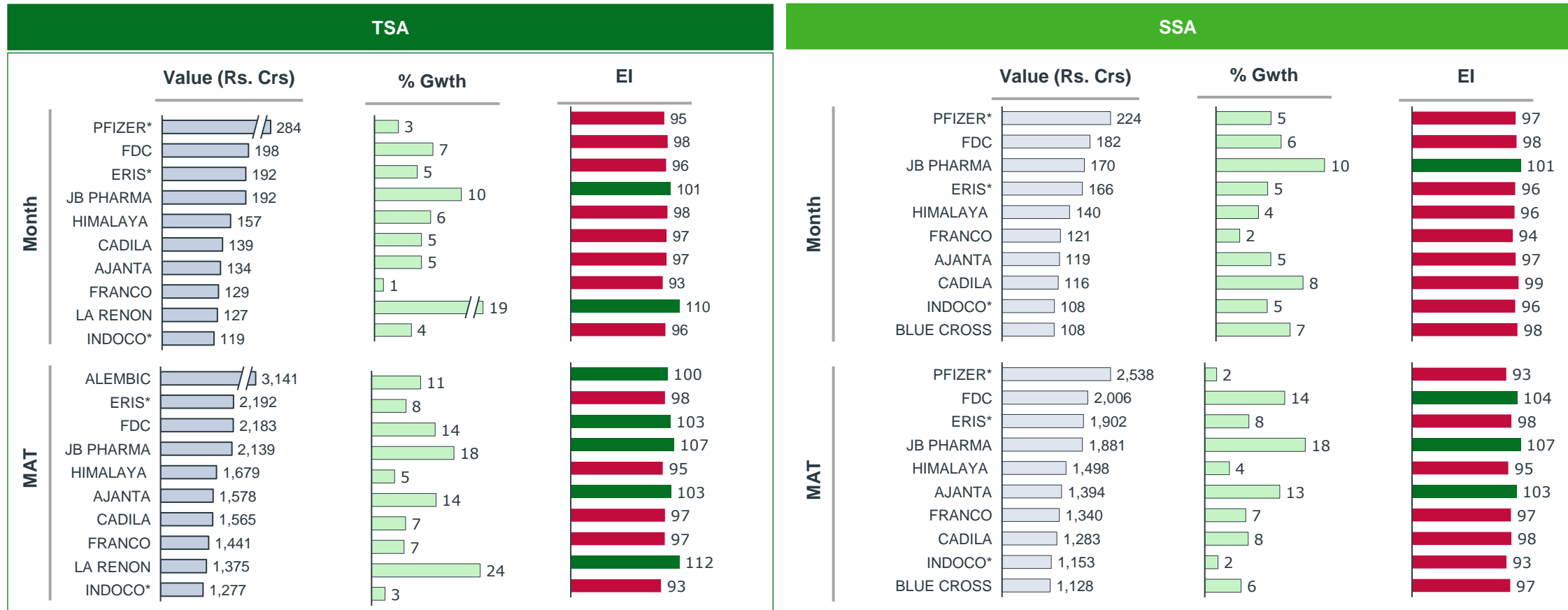
Top Companies #21-30 Market Share Trend



	Val Sep'23	MS Sep'23
— PFIZER*	284	1.48
— (FDC)	198	1.03
— (ERIS*)	192	1.00
— (JB PHARMA*)	192	1.00
— (HIMALAYA)	157	0.82
— CADILA	139	0.72
— (AJANTA)	134	0.70
— (FRANCO)	129	0.67
— LA RENON	127	0.66
— INDOCO*	119	0.62

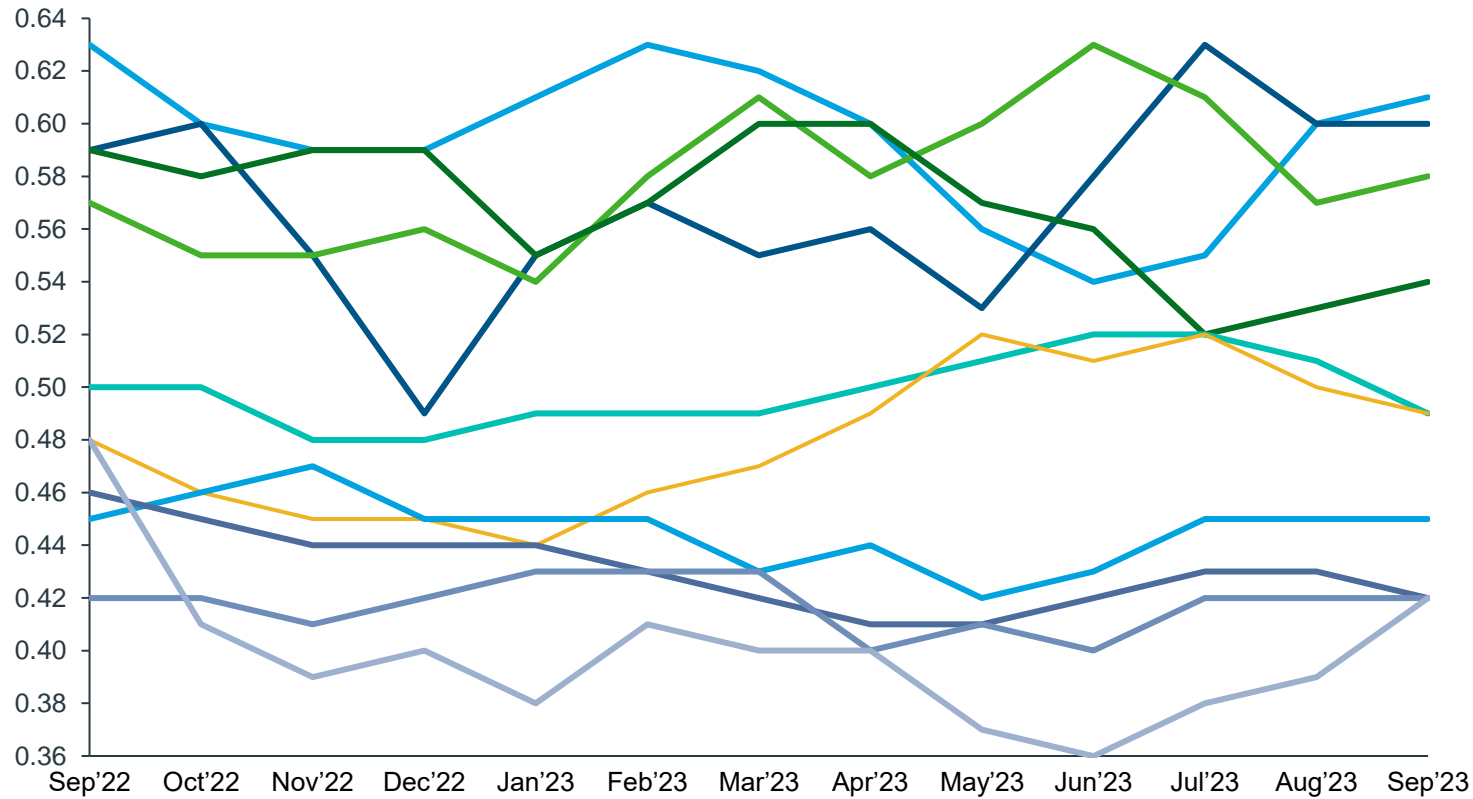
- Pfizer*, Cadila & La Renon have shown improvement in MS for Sep'23 as compared to Aug'23
- Indoco* have maintained MS in the month of Sep'23
- FDC, Eris*, JB Pharma*, Himalaya, Ajanta & Franco have reflected dip in MS for Sep'23 as compared to Aug'23

Top Companies #21-30



- **TSA:** La Renon has posted the highest growth for the month followed by JB Pharma and for MAT, La Renon has posted highest growth followed by JB Pharma*
- **SSA:** JB Pharma has posted highest growth for the Month followed by Cadila and for MAT, JB Pharma* has reflected highest growth followed by FDC

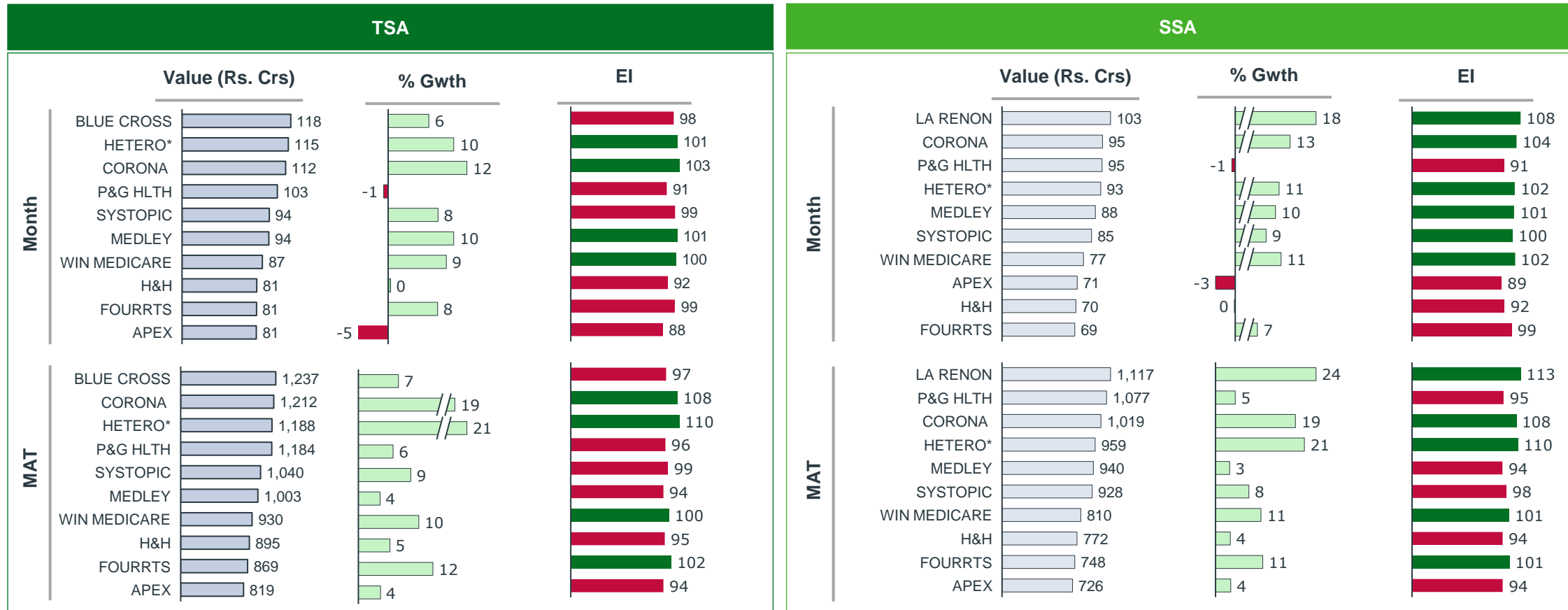
Top Companies #31-40 Market Share Trend



	Val Sep'23	MS Sep'23
— BLUE CROSS	118	0.61
— HETERO*	115	0.60
— CORONA	112	0.58
— P&G HLTH	103	0.54
— (SYSTOPIC)	94	0.49
— (MEDLEY)	94	0.49
— WIN MEDICARE	87	0.45
— (H&H)	81	0.42
— FOURRTS	81	0.42
— APEX	81	0.42

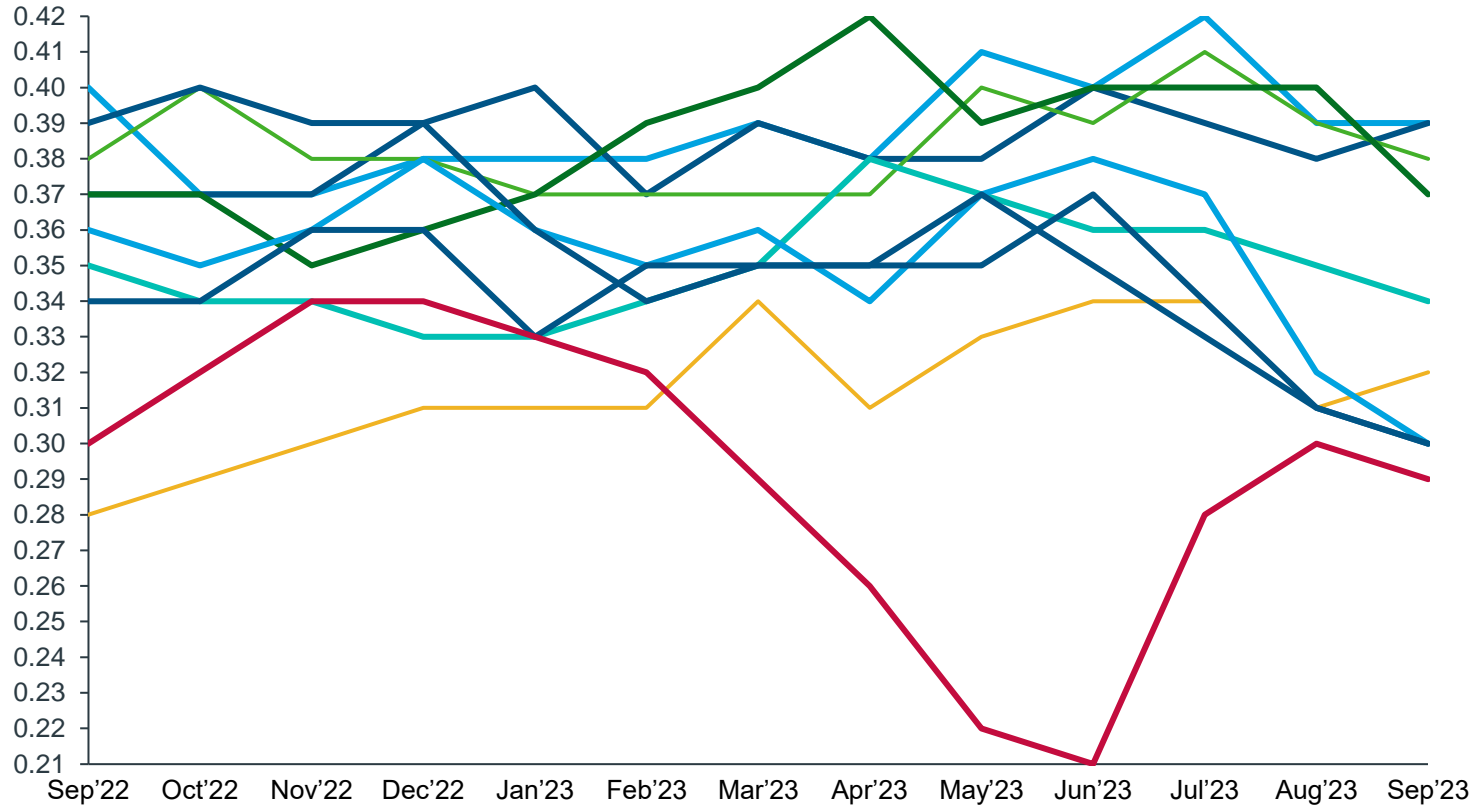
- Blue Cross, Corona, P&G & Apex have shown improvement in MS for Sep'23 as compared to Aug'23
- Hetero*, Win Medicare & Fourrts have maintained MS in the month of Sep'23
- Systopic, Medley & H&H have reflected dip in MS for Sep'23 as compared to Aug'23

Top Companies #31-40



- **TSA:** Corona shows the highest growth at month level, while for MAT, Hetero* has posted highest growth followed by Corona
- **SSA:** La Renon shows the highest growth at month level, while for MAT, La Renon has posted highest growth followed by Hetero*

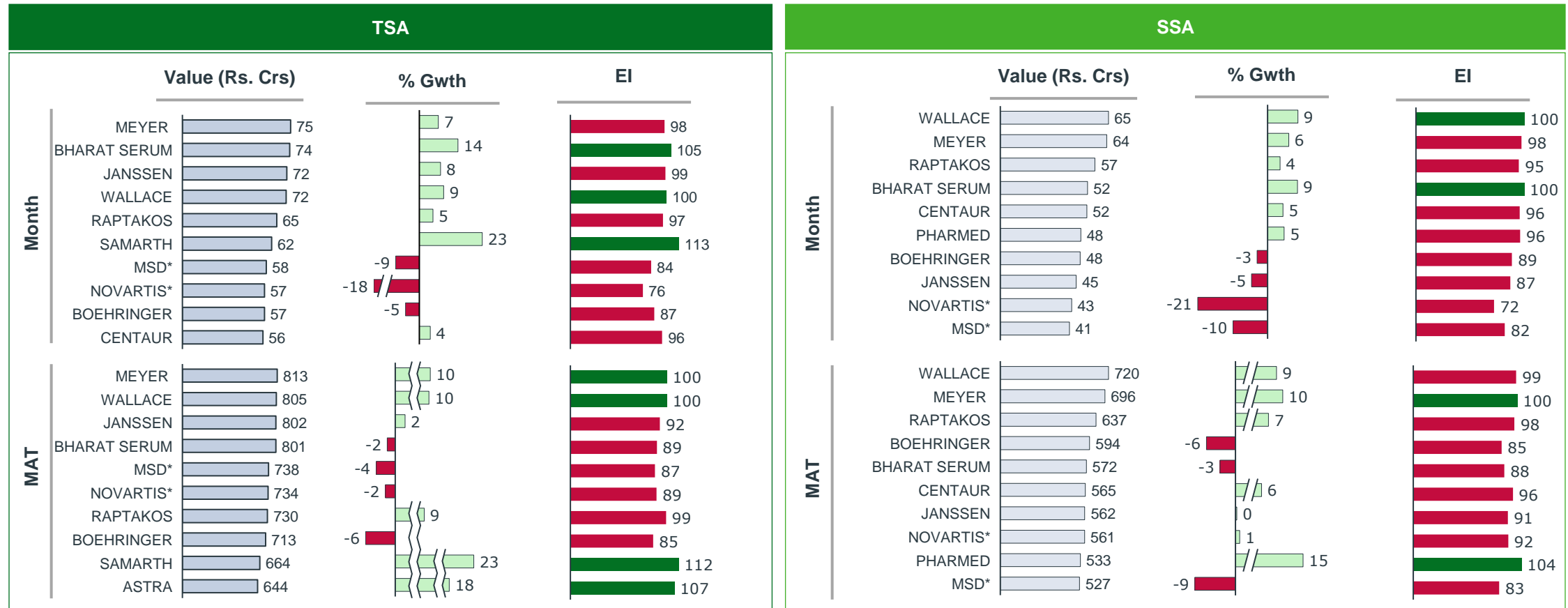
Top Companies #41-50 Market Share Trend



	Val Sep'23	MS Sep'23
MEYER	75	0.39
BHARAT SERUM	74	0.39
(JANSSEN)	72	0.38
(WALLACE)	72	0.37
(RAPTAKOS)	65	0.34
SAMARTH	62	0.32
(MSD*)	58	0.30
(NOVARTIS*)	57	0.30
(BOEHRINGER)	57	0.30
(CENTAUR)	56	0.29

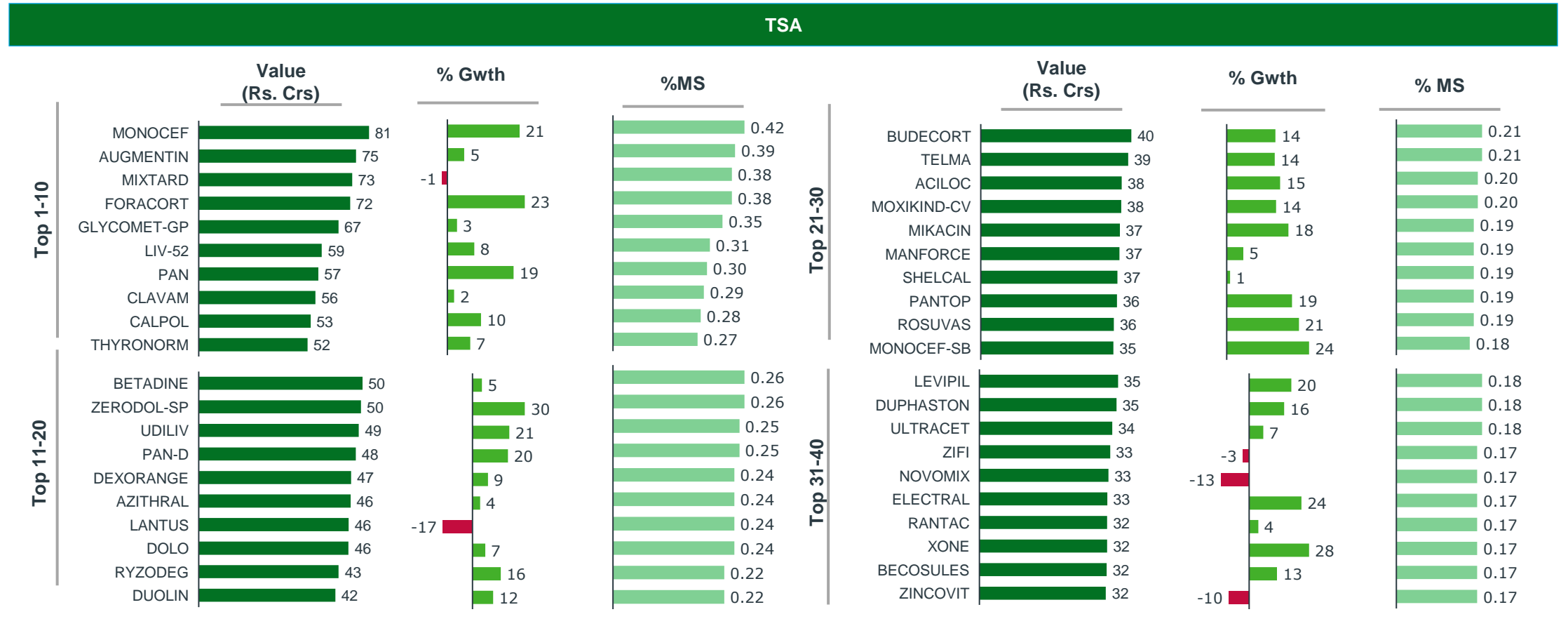
- Bharat Serum & Samarth have shown improvement in MS for Sep'23 as compared to Aug'23
- Meyer have maintained MS in the month of Sep'23
- Janssen, Wallace, Raptakos, MSD*, Novartis*, Boehringer & Centaur have reflected dip in MS for Sep'23 as compared to Aug'23

Top Companies #41-50



- **TSA:** Samarth is the fastest growing company for the month followed by Bharat Serum and for MAT, Samarth has posted highest growth followed by Astra
- **SSA:** Bharat Serum & Wallace are the fastest growing company at month level while for MAT, Pharmed is the fastest growing company followed by Meyer

Top 40 Brands



- Monocef is the topmost brand with 81 Crs of sales & MS of ~0.42% for the month
- Among top 10 brands, Foracort has shown highest growth followed by Monocef for the month

Star Brands of the month

TSA

Movers & Shakers TSA: Products

Among the Top 25 products as per Sep'23 Month (in comparison to Aug'23 Month)

- Monocef has gained No 1 position at month level with a growth of 21%
- Amongst the top 20 Brands, Zerodol SP observed highest growth of 30%
- Foracort & Clavam gained 1 rank each to secure 4th & 8th position, respectively
- Zerodol- SP gained 2 ranks to secure 12th position
- Calpol gained 3 ranks to secure 9th position with a growth of 10%
- Azithral, Duolin, Aciloc & Moxikind CV gained 5 ranks to secure 16th, 20th, 23rd, 24th position with a growth of 4%, 12%, 15% & 14%
- Mikacin gained 6 ranks to secure 25th position with a growth of 18%
- Budecort gained 16 ranks to secure 21st position with a growth of 14%

Highlight

TSA

Movers & Shakers TSA: Companies

In the month of Sep'23 (in comparison to Aug'23), among the Top 25 companies

- Sun* has maintained its top position in the IPM with a market share of 8%
- Macleods, Glenmark, Alembic & Eris* improved by 1 rank each to reach 6th, 15th, 20th & 23rd position, respectively
- Aristo* improved by 2 ranks to reach 8th position

As per MAT Sep'23 (in comparison to MAT Aug'23), among the Top 25 companies

- Sun* has maintained its top position in the IPM with a market share of 8%
- All companies maintained their ranks except Glenmark & Sanofi* improved by 1 rank each to reach 14th & 19th position, respectively

SSA

Movers & Shakers SSA: Companies

In the month of Sep'23 (in comparison to Aug'23), among the Top 25 companies

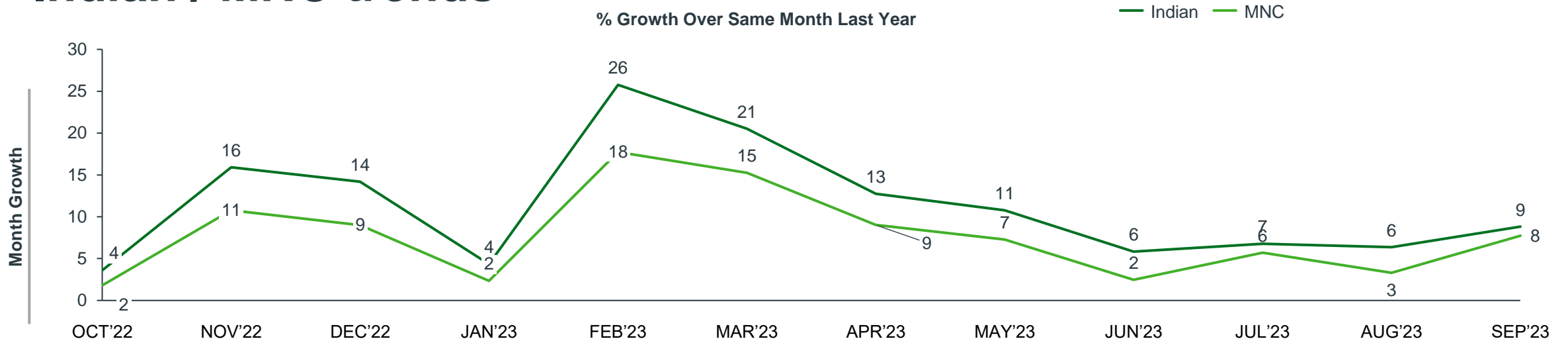
- Sun* has maintained its top position in the IPM with a market share of 8%
- Aristo* improved by 3 ranks each to reach 7th position

As per MAT Sep'23 (in comparison to MAT Aug'23), among the Top 25 companies

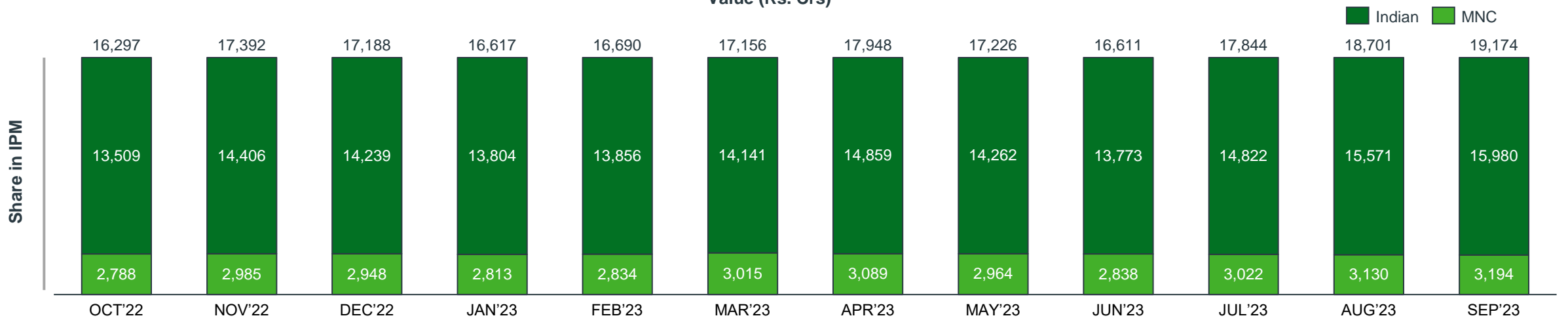
- Sun* has maintained its top position in the IPM with a market share of 8%
- All Companies maintained their ranks except Sanofi* improved by 1 rank to reach 20th position at MAT Sep'23

Indian / MNC trends

% Growth Over Same Month Last Year

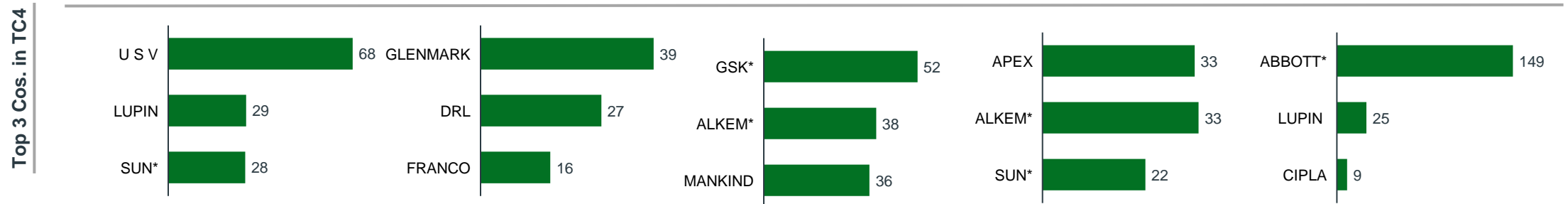
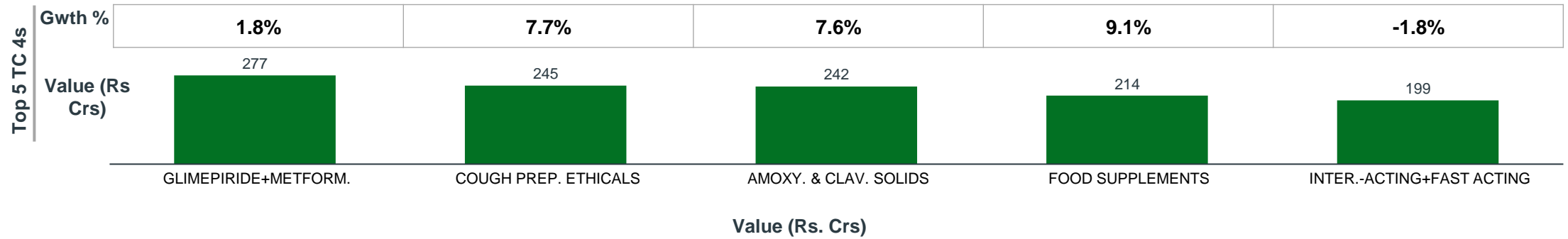
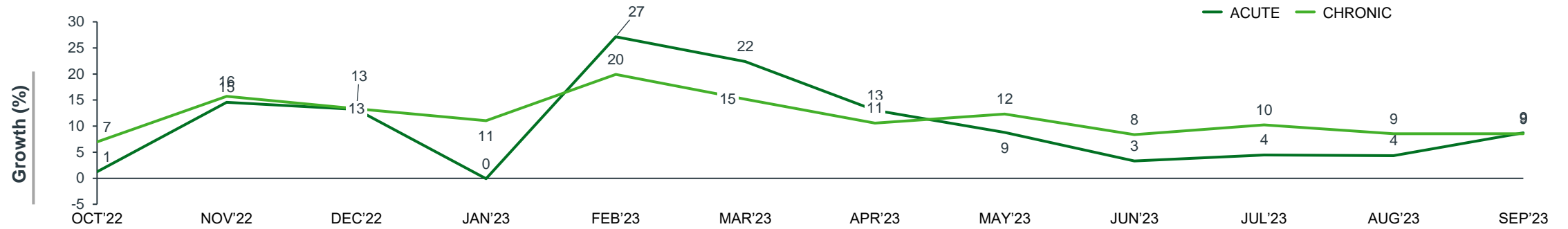


Value (Rs. Crs)



• Indian companies has registered growth of 9% whereas MNC's registered a growth of 8% for the month

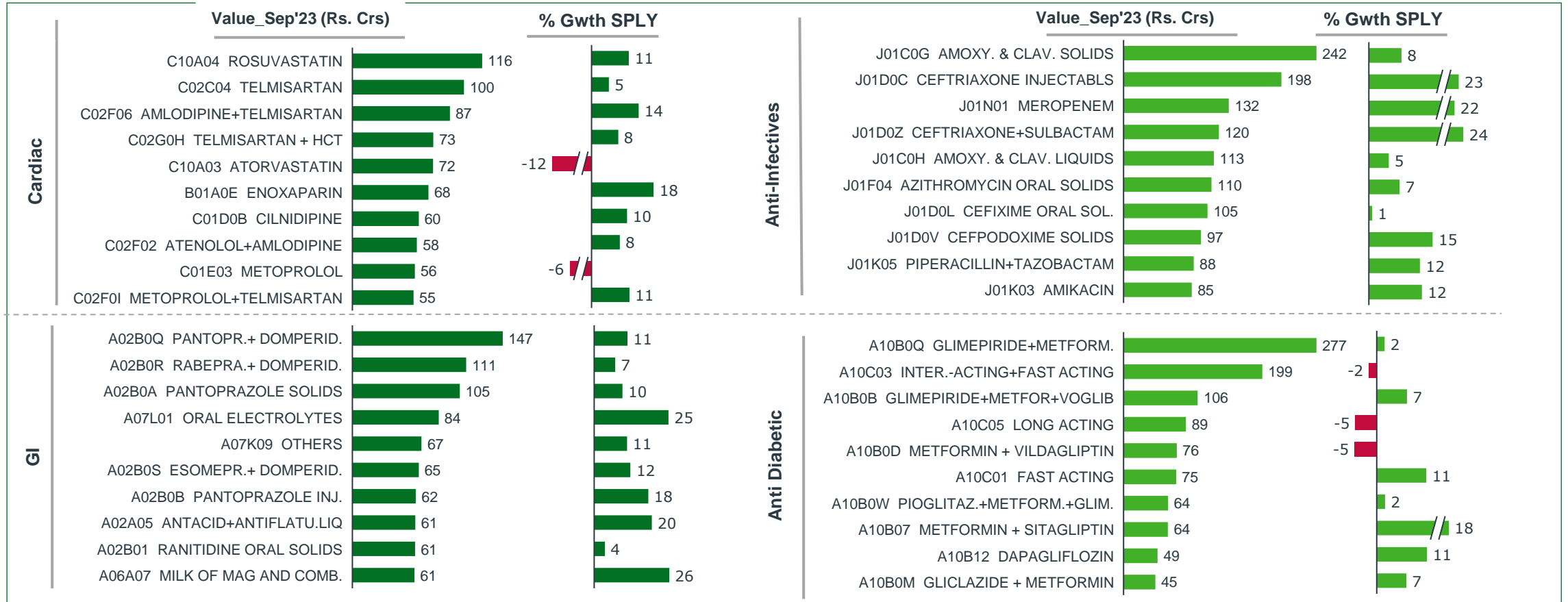
Acute / Chronic Trends



• Both Acute & Chronic segments have shown growth of 9% for the month

Top Therapy Trends

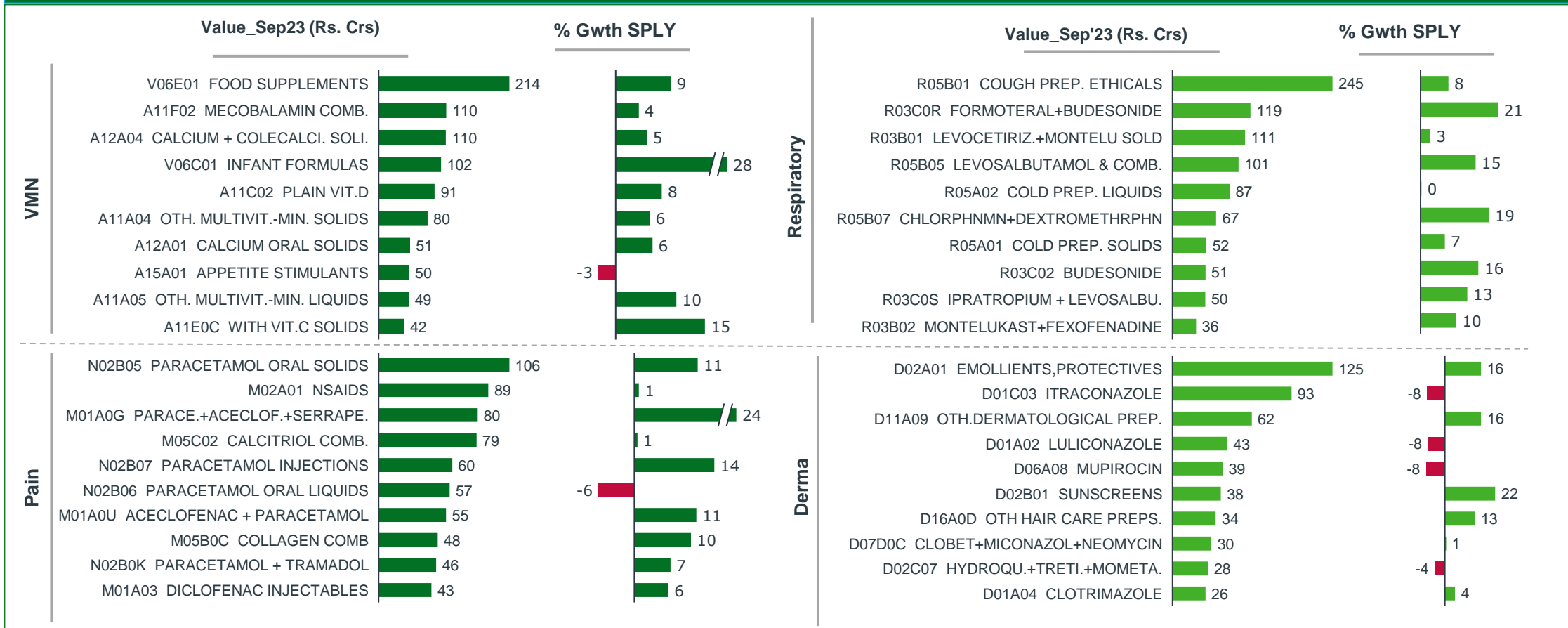
TSA



- In Cardiac, Enoxaparin posted 18% growth which is highest amongst top therapies
- In AI, Ceftriaxone+Sulbactam posted highest growth of 24%
- In GI, Milk of Mag and comb. subgroup posted highest growth of 26%
- In Anti diabetic, Metformin+Sitagliptin subgroup has posted highest growth of 18%

Top Therapy Trends

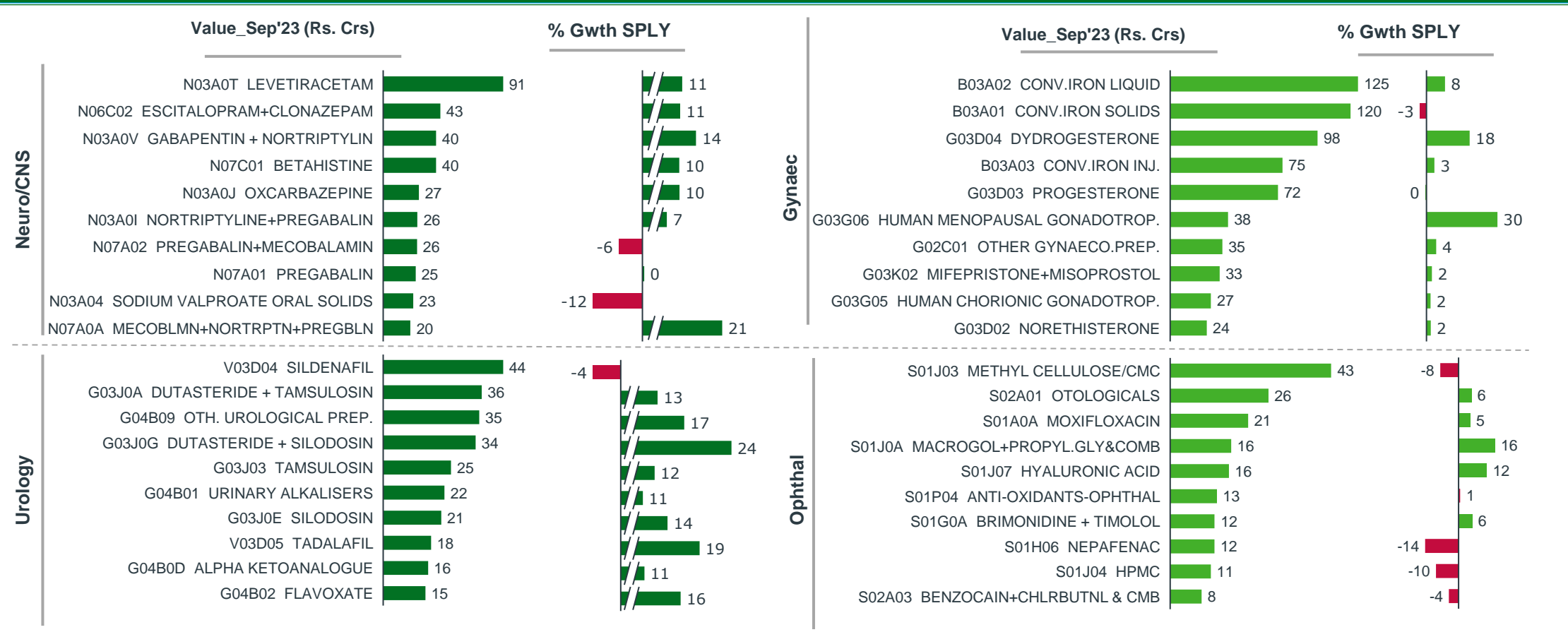
TSA



- In VMN therapy, food supplements is the top contributing subgroup with 214 Cr of sales posted growth of 9%
- In Respiratory market, Formoterol+Budesonide posted highest growth of 21%
- In Pain market, paracetamol oral solids, liquids & inj contributed ~ 223 Crs of sales with 11%,-6% & 14% growth, respectively
- Emollients protectives registered highest sales of 125 Cr in derma market with 16% growth while the highest growth of 22% is observed in Sunscreens

Top Therapy Trends

TSA



- In Neuro therapy, Levetiracetam is the top contributing subgroup with 91 Cr of sales posted growth of 11%
- In Gynaec therapy, conv iron solids, liquids and inj. together have contributed ~320 Cr of sales to the entire therapy
- In Urology therapy, Dutasteride+Silodosin posted highest growth of 24%
- Methyl Cellulose registered highest sales of 43 Cr in ophthalm therapy with -8% growth while the highest growth of 16% is observed in Macrogol+Propyl.Gly & Comb

Key changes

PTR Changes (Top 50 brands)

- Total number of SKUs with PTR changes in Sep'23 are 2331
- Among the top 50 brands of the industry, PTR changes reflected in SKUs of the following brand- Cremaffin Plus, Zerodol-SP, Telma, Telma, Budecort, Betadine, Aciloc, Azithral, Azithral, Azithral, Calpol, Levipil, Liv-52, Liv-52, Liv-52, Mikacin, Monocef, Moxikind-CV, Thyronorm, Thyronorm, Volini, Zifi, Mikacin, Mikacin, Volini, Monocef-Sb, Zifi

New Lab & Corporate

- 16 Corporates & Labs were introduced in Sep'23 dataset

New Introduction

- 1058 new packs were Introduced in Sep'23

Brand Transfer

- Daonil, Daonil-M, Jevtana, Lactacyd, Semi-Daonil, Taxotere brand has been transferred from Emcure to Sanofi* in Sep'23
- Flexbumin, Human Albumin, Kynteles brand has been transferred from Baxter to Takeda in Sep'23
- Depura, Depura Cal brand has been transferred from Universal Nutrisc. to Sanofi* in Sep'23
- Myoril brand has been transferred from Universal Nutrisc. to Corona in Sep'23
- Uzil brand has been transferred from Eris Life Sciences to Eris Oaknet Health in Sep'23

THANK YOU

