

# Insights Unwrapped

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PHARMACEUTICAL



26 August, 2024

# GLOBAL PHARMA OUTLOOK

## Global Pharmaceutical Market

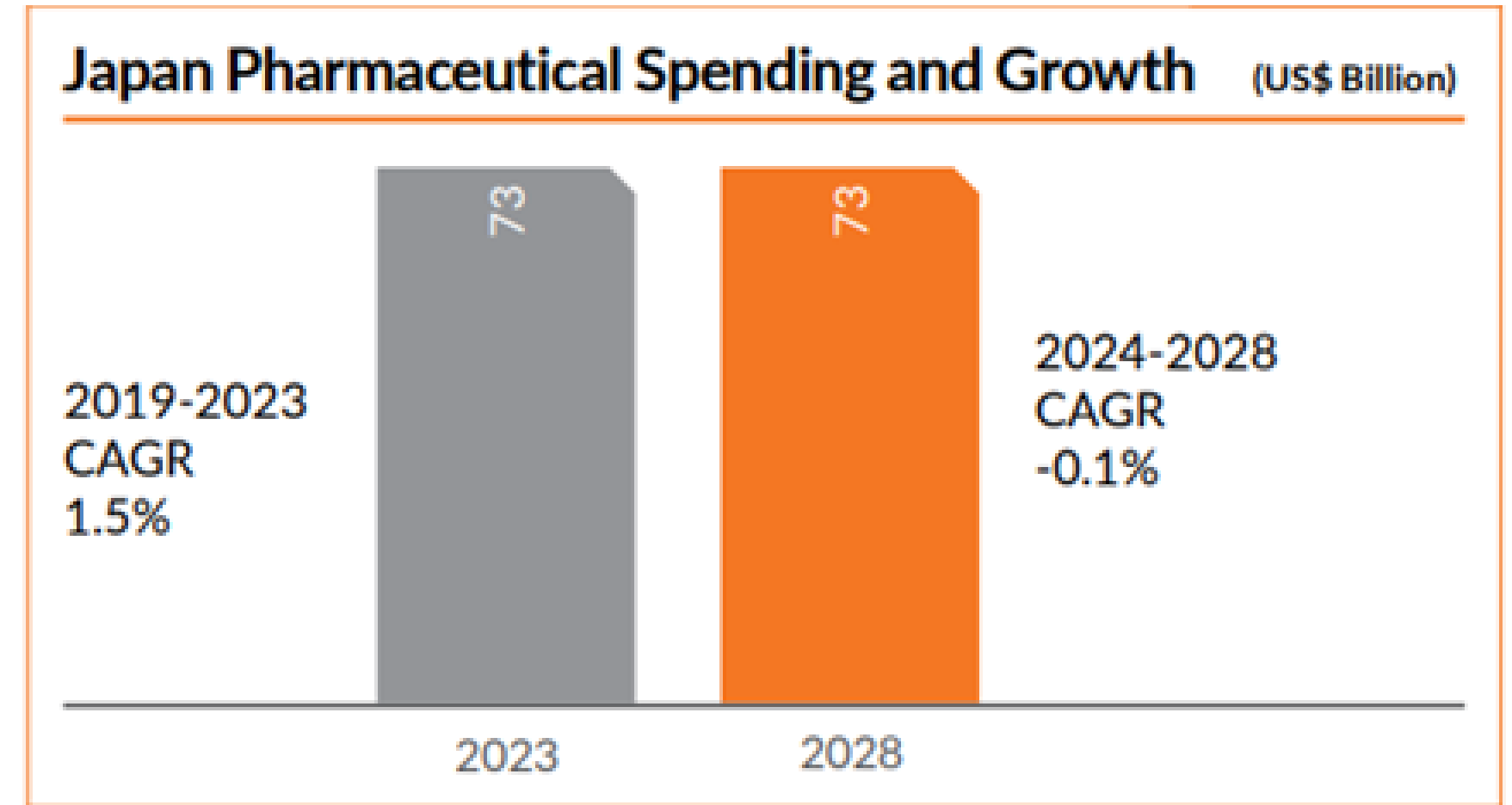
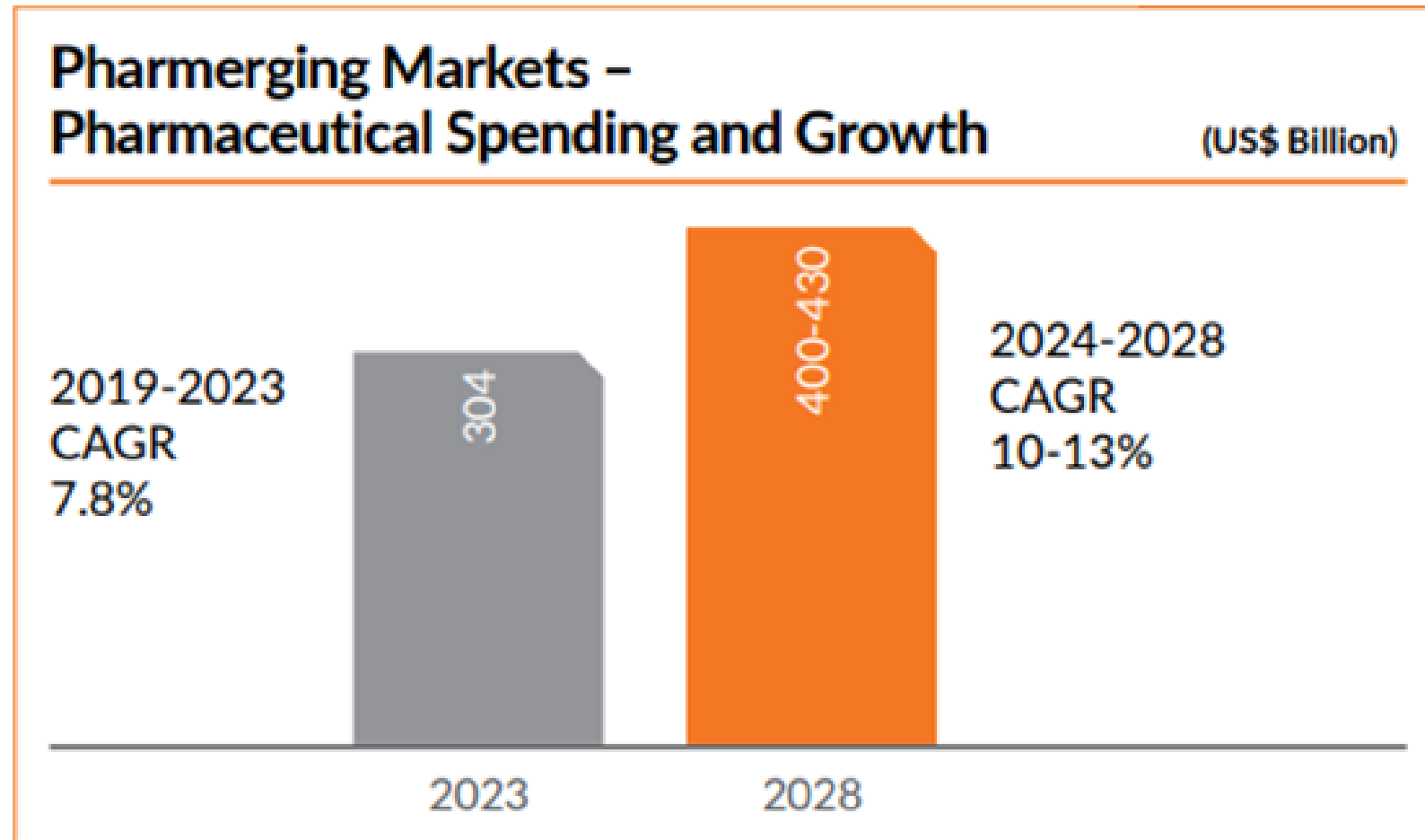
**Table 1**

Region	2023	2019-2023 CAGR	2028	2024-2028 CAGR
Developed Markets	1,276	7.2%	1,775-1,805	5-8%
Pharmerging Markets	304	7.8%	400-430	10-13%
Other Markets	28	5.6%	33-37	3-6%
<b>Global Pharmaceutical Market</b>	<b>1,607</b>	<b>7.3%</b>	<b>2,225-2,255</b>	<b>6-9%</b>

Pharmerging Markets include- Argentina, Bangladesh, Brazil, China, Colombia, Egypt, Indonesia, Mexico, Pakistan, India, Philippines, South Africa, Thailand, and Vietnam

**SOURCE: SUN PHARMA AR24**

# GLOBAL PHARMA OUTLOOK



**COMPANIES WITH EXPOSURE TO JAPAN CAN BE IN STRESS**

**SOURCE: SUN PHARMA AR24**

# GLOBAL PHARMA OUTLOOK

## Exhibit 1: Global Invoice Spending and Growth

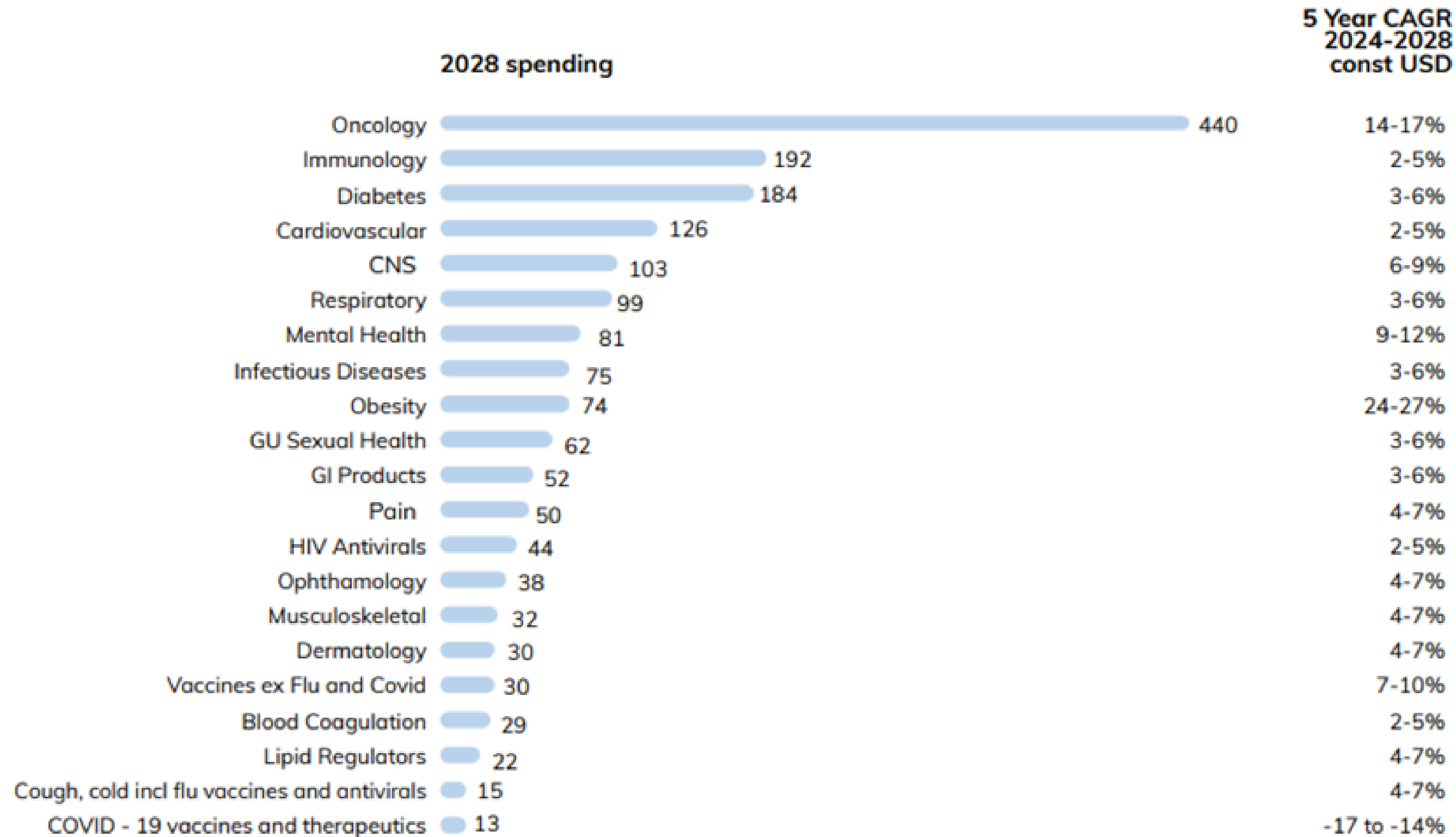
Invoice Spending and Growth	2023 Spending USD Bn	2019-2023 CAGR	2028 Spending USD Bn	2024-2028 CAGR
Developed	1,276	7.2%	1,775-1,805	5-8%
Pharmerging	304	7.8%	400-430	10-13%
Lower-income countries	28	5.6%	33-37	3-6%
Global	1,607	7.3%	2,225-2,255	6-9%

Source: Global use of Medicines 2024 by IQVIA

**HIGHEST GLOBAL SPENDING ON PHARMERGING**

**SOURCE: AJANTA PHARMA AR 2024**

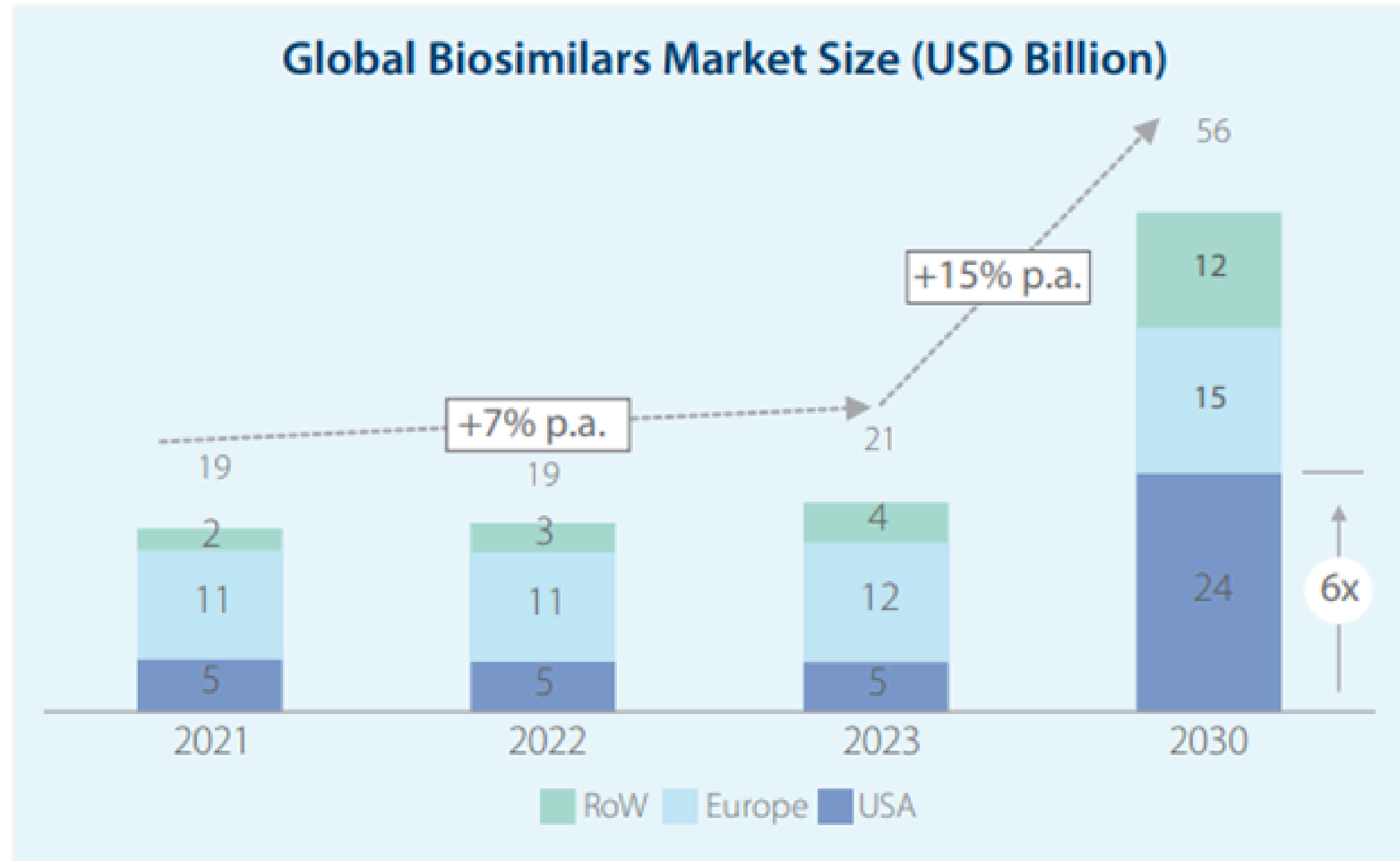
# ONCOLOGY AND OBESITY DRUGS- LARGEST CONTRIBUTOR IN NEXT 5 YEARS



Source: The Global Use of Medicines 2024: Outlook to 2028, IQVIA

SOURCE: BIOCON AR24

# POTENTIAL IN BIOSIMILARS



World's Top Biosimilar Companies include - Pfizer, Amgen, Sandoz, Teva Pharma, Mylan, **Bioccon**, Eli Lilly

Note: Revenue only from Biosimilars I Methodology – Originator sales based on LOE x 80% biosimilar adoption x 65% price erosion

Source: Evaluate Pharma, McKinsey analysis

**SOURCE: BIOCON AR24**

# MORE PLAYERS THAT ARE ACTIVELY EYEING BIOSIMILARS

Wockhardt is focussed on two major therapies which have high growth potential in the overall Pharma market.

First is the Biosimilar program. Wockhardt focusses its Biosimilar program in the Anti-Diabetic space. The overall Antidiabetic market size in Emerging markets is in excess of USD 16 billion of which India contributes USD 2.2 billion and is expected to grow in double digits.

**SOURCE: WOCKHARDT AR24**

# OTC PRODUCTS- INTERESTING INSIGHTS

Revenue from Top 21 brands  
(above INR 100 Cr) in FY 2024.

MARKET SHARE % in FY 24

Brand	Revenue (INR Cr)	CAGR FY21-24	MARKET SHARE % in FY 24	RANK
Manforce*	490.9	24.7%	47.5%	1
Moxikind-CV	382.1	20.7%	9.7%	3
Unwanted-Kit	246.5	15.0%	51.0%	1
Amlokind-AT	240.6	13.5%	34.8%	1
Prega News	223.8	19.3%	83.9%	1
Dydroboon	209.3	35.2%	17.6%	2
Gudcef	201.1	23.7%	15.1%	2
Candiforce	195.6	1.2%	20.7%	1
Glimestar-AM	190.4	9.9%	5.7%	5
Nurokind-Gold	155.2	12.3%	7.1%	1
Telmikind-AM	145.4	27.0%	13.3%	2
Nurokind-LC	138.9	9.9%	53.3%	1
Cefakind	137.0	22.4%	15.7%	2
Telmikind-H	136.4	12.6%	15.3%	2
Nurokind Plus-RF	132.7	3.7%	9.1%	2
Telmikind	131.8	12.3%	11.0%	2
Vomikind	129.4	25.4%	24.9%	2
Gudcef-CV	119.7	24.0%	16.8%	1
Unwanted-72	116.3	12.0%	60.3%	1
Monticope	115.9	19.1%	7.6%	3
Asthakind-DX	115.1	32.5%	4.7%	6

- Gastro/VMN
- Cardiac
- Gynaec
- Anti-Infectives
- Derma
- Respiratory
- Anti-Diabetic
- Consumer

## KEY BRANDS OF MANKIND PHARMA

MARKET SHARE  
**PREGNEWS > 83%**  
**UNWANTED > 60%**  
**MANFORCE > 47%**

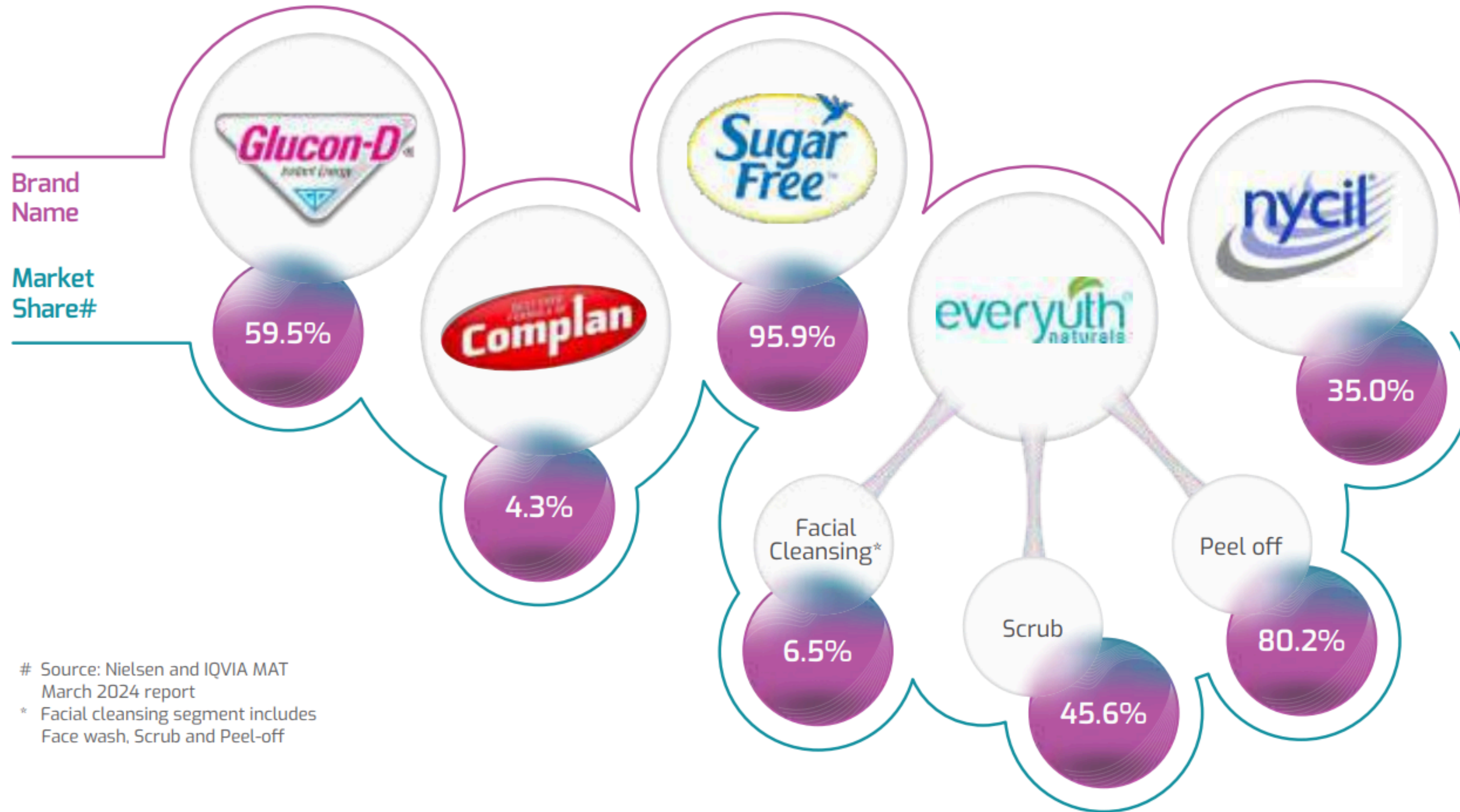
Source: IQVIA TSA MAT March 2024

\*as per IQVIA TSA MAT Mar'24 which primarily includes Manforce Tablets. As per IQVIA retail, Manforce Condom has a market share of 30%.

**SOURCE: MANKIND PHARMA**



# MARKET SHARE: NO#1 (IN 5 OUT OF 6 BRANDS)



# Source: Nielsen and IQVIA MAT  
March 2024 report

\* Facial cleansing segment includes  
Face wash, Scrub and Peel-off

**SOURCE: ZYDUS LIFESCIENCES AR24**

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