

A study on Market potential of Oncology in India

Presented by Amulya Sharma

Mentored by Prof. Rahul Sharma

Objective

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- To study the Market Potential of Oncology drugs in India.
- To identify current trends in growth of Oncology drugs in India.

Methodology

- **STUDY SETTING** –Mumbai, Maharashtra.
- **STUDY DURATION**-Three months.
- **STUDY DESIGN** –Descriptive Study.
- **DATA TYPE**– Secondary Data.
- **DATA COLLECTION SOURCE** –Data collected from the AIOCD & IMS.
- **DATA ANALYSIS** –The data analysis would be done with the help of MS Excel.

Cancer- a brief introduction

- Cells are the basic units that grow and divide to make new cells as the body needs them. Usually, cells die when they get too old or damaged. Then, new cells take their place.
- Cancer begins When Cells start to grow uncontrollably. These cells may form a mass called a tumor. A tumor can be cancerous or benign.
- A cancerous tumor is malignant, meaning it can grow and spread to other parts of the body. A benign tumor means the tumor can grow but will not spread.
- Some types of cancer do not form a tumor. These include leukemias, most types of lymphoma, and myeloma.

Types of cancer

- **Carcinomas.** A carcinoma begins in the skin or the tissue that covers the surface of internal organs and glands. Examples of carcinomas include **prostate cancer, breast cancer, lung cancer, and colorectal cancer.**
- **Sarcomas** A **sarcoma** begins in the tissues that support and connect the body. A sarcoma can develop in fat, muscles, nerves, tendons, joints, blood vessels, lymph vessels, cartilage, or bone.
- **Leukemias** Leukemia is a cancer of the blood.. The four main types of leukemia are **acute lymphocytic leukemia, chronic lymphocytic leukemia, acute myeloid leukemia, and chronic myeloid leukemia.**
- **Lymphomas** Lymphoma is a cancer that begins in the lymphatic system.. There are two main types of lymphomas: **Hodgkin lymphoma and non Hodgkin lymphoma.**

What causes cancer?

- These changes are the result of the interaction between a person's genetic factors and 3 categories of external agents, including:
- physical carcinogens, such as ultraviolet and ionizing radiation;
- chemical carcinogens, such as asbestos, components of tobacco smoke, aflatoxin (a food contaminant), and arsenic (a drinking water contaminant); and
- biological carcinogens, such as infections from certain viruses, bacteria, or parasites..
- Ageing is another fundamental factor for the development of cancer.

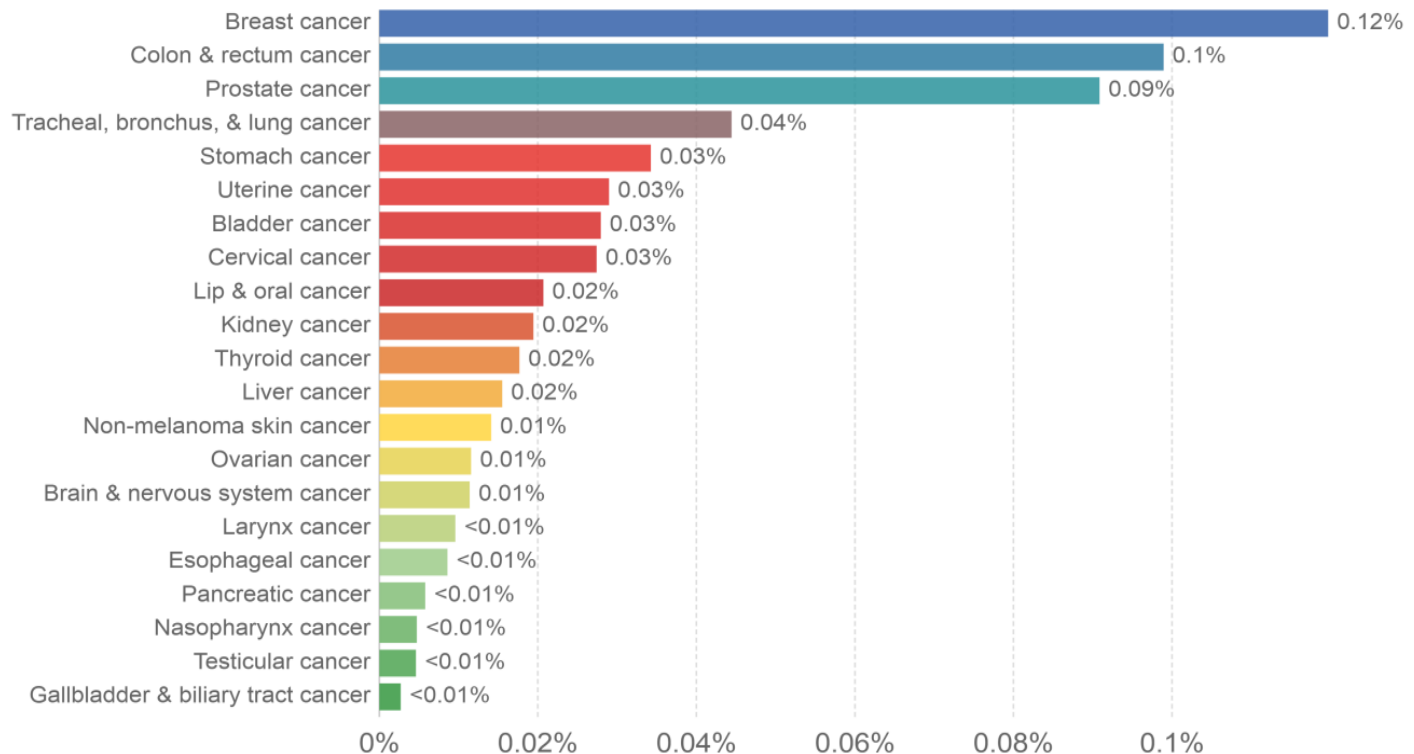
TOP TEN BRANDS

BRAND	MOLECULE	MARKET SHARE
GEFTINAT	GEFITINIB	4.7%
ERLONAT	ERLOTINIB	4.1%
VEENAT	IMATINIB MESYLATE	3.6%
LENALID	LENALIDOMIDE	3.1%
VIVITRA	TRASTUZUMAB	2.5%
FOLITRAX	METHOTREXATE	1.9%
SORAFENAT	SORAFENIB	1.8%
CANMAB	TRASTUZUMAB	1.7%
REDITUX	RITUXIMAB	1.6%
ABIRAPRO	ABIRATERONE ACETATE	1.6%

Population Suffering from Cancer in World

Share of population suffering from cancer types, World, 2016

Share of total population with different forms of cancer, measured as the age-standardized percentage. This share has been age-standardized assuming a constant age structure to compare prevalence between countries and through time.



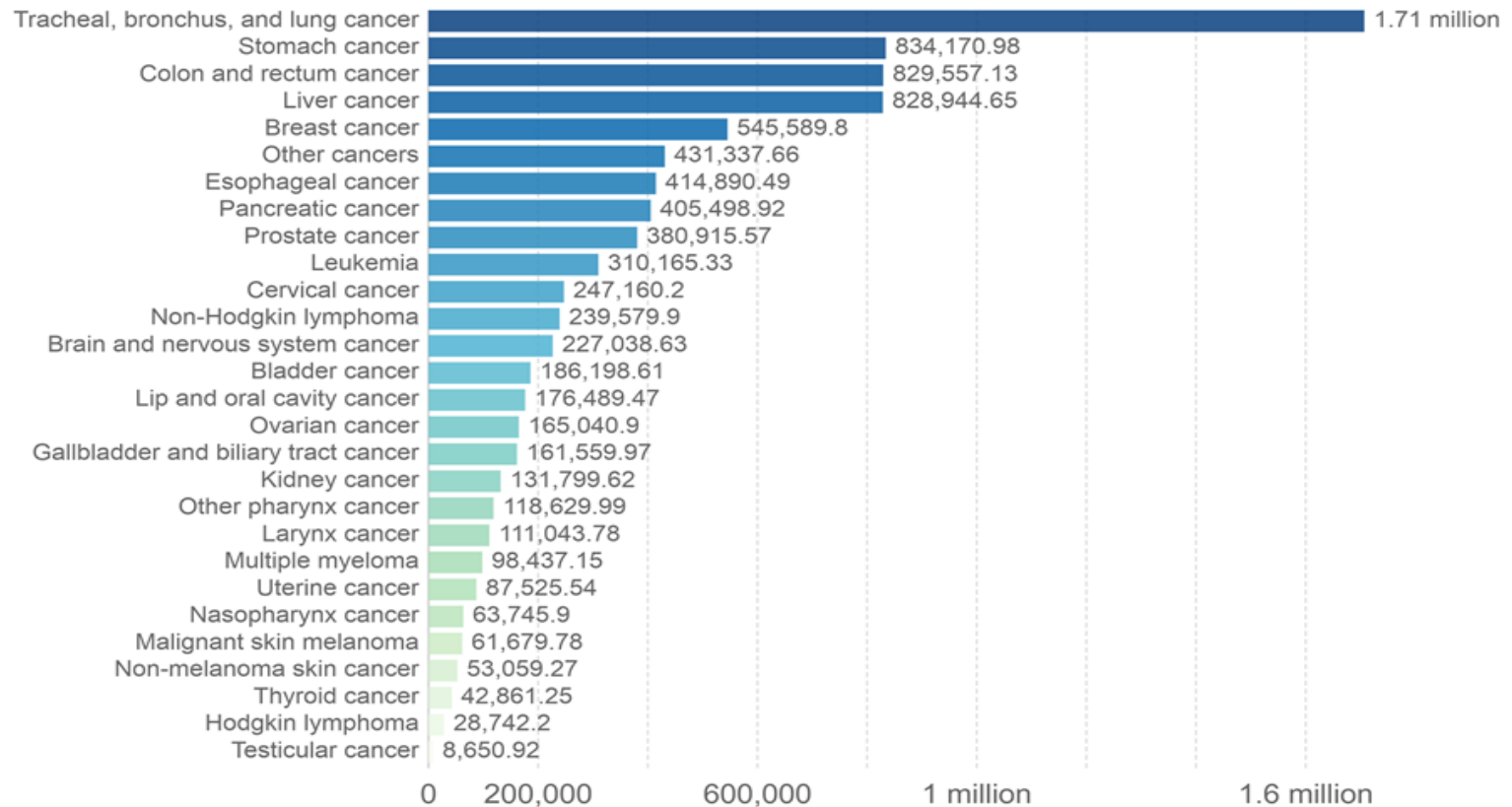
Source: IHME, Global Burden of Disease

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Cancer deaths by Type in World

Cancer deaths by type, World, 2016

Total annual number of deaths from cancers across all ages and both sexes, broken down by cancer type.



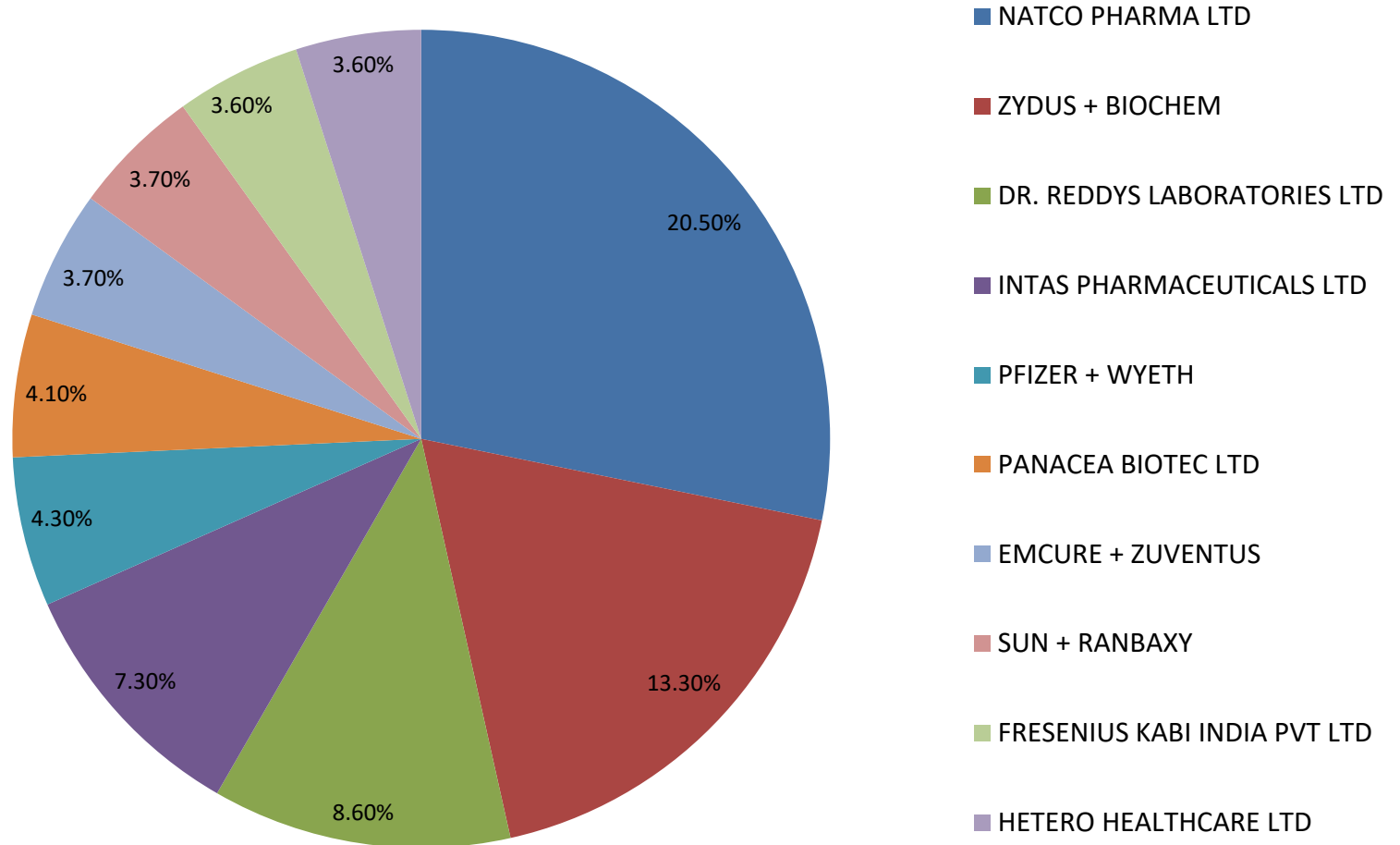
Source: IHME, Global Burden of Disease (GBD)

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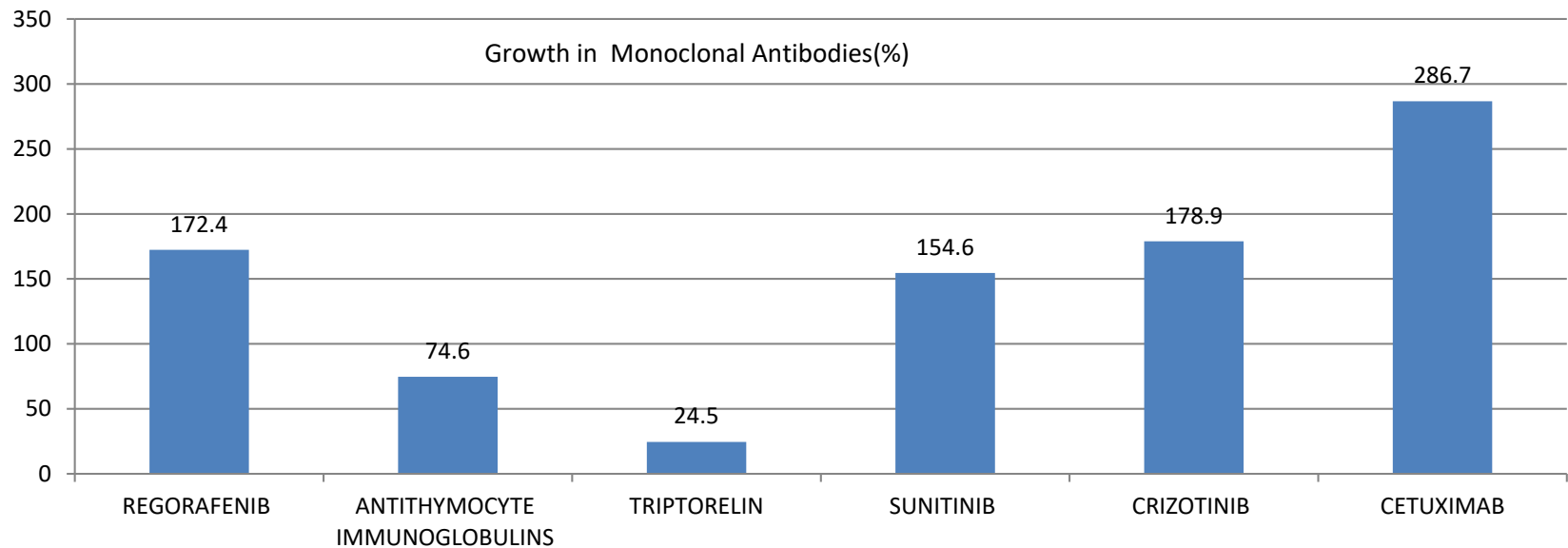
Findings

- Top 10 brands account for **27 %** of market share in oncology segment.
- Top 10 companies contribute **72.70 %** of Total oncology market.
- **Anti-Neoplastics, Vinca alkaloids and Plant products, and Immunosuppressive and Immunostimulating agents** contribute for 45 % of Revenue in Oncology market.
- The main therapeutic categories which account for oncology sales are **Anti-Neoplastics, Vinca alkaloids and Plant products, and Immunosuppressive and Immunostimulating agents**.
- **Haryana** records highest cases of Cancer in India.
- **Small molecules** (Chemotherapeutic drugs) have high revenue, as compared to biologics (Monoclonal Antibodies)
- Potential segment areas in cancer are **Lung Cancer, Oral Cavity, Cervix Cancer & Breast Cancer**.

Top 10 Oncology Companies in IPM

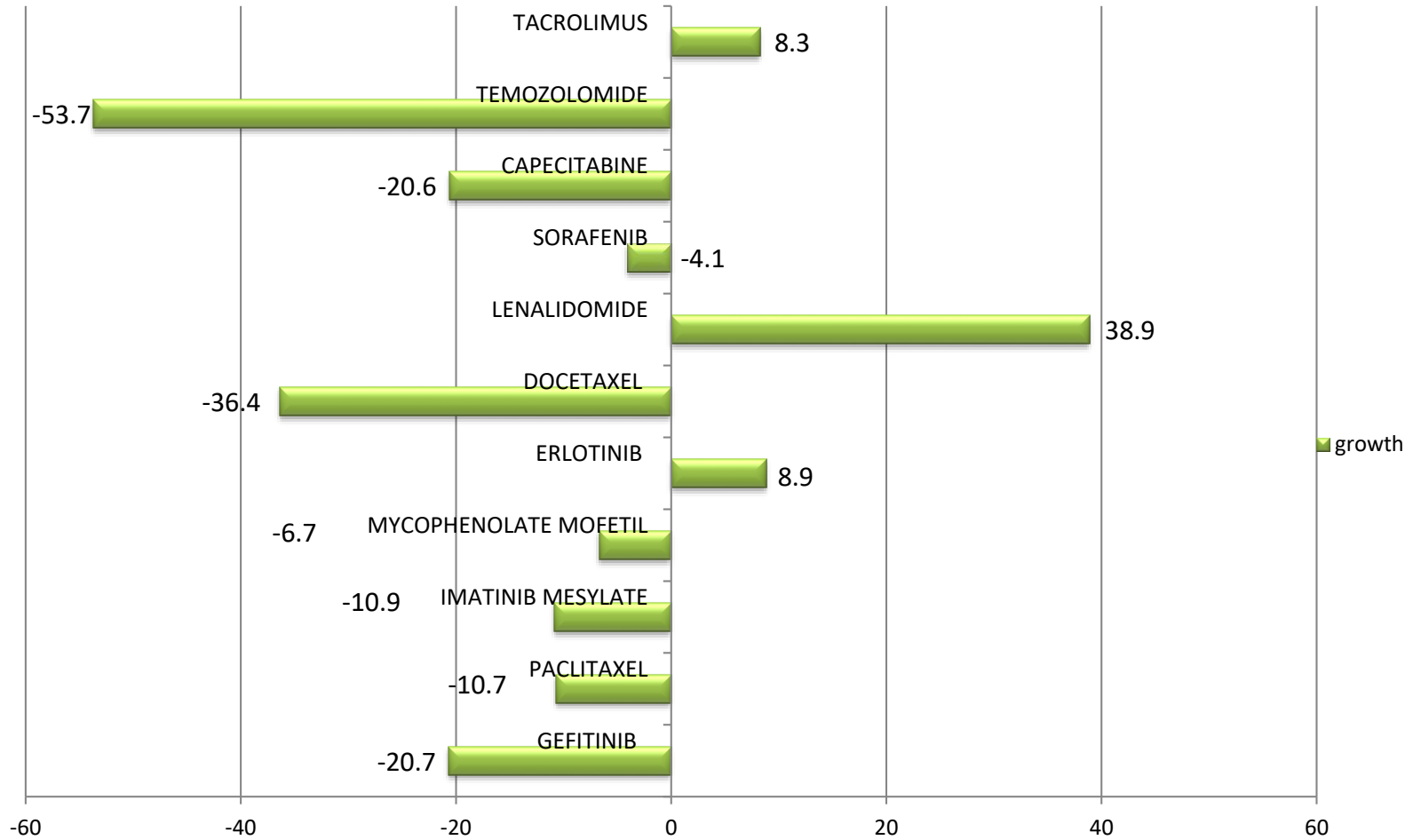


Growth in Monoclonal Antibodies

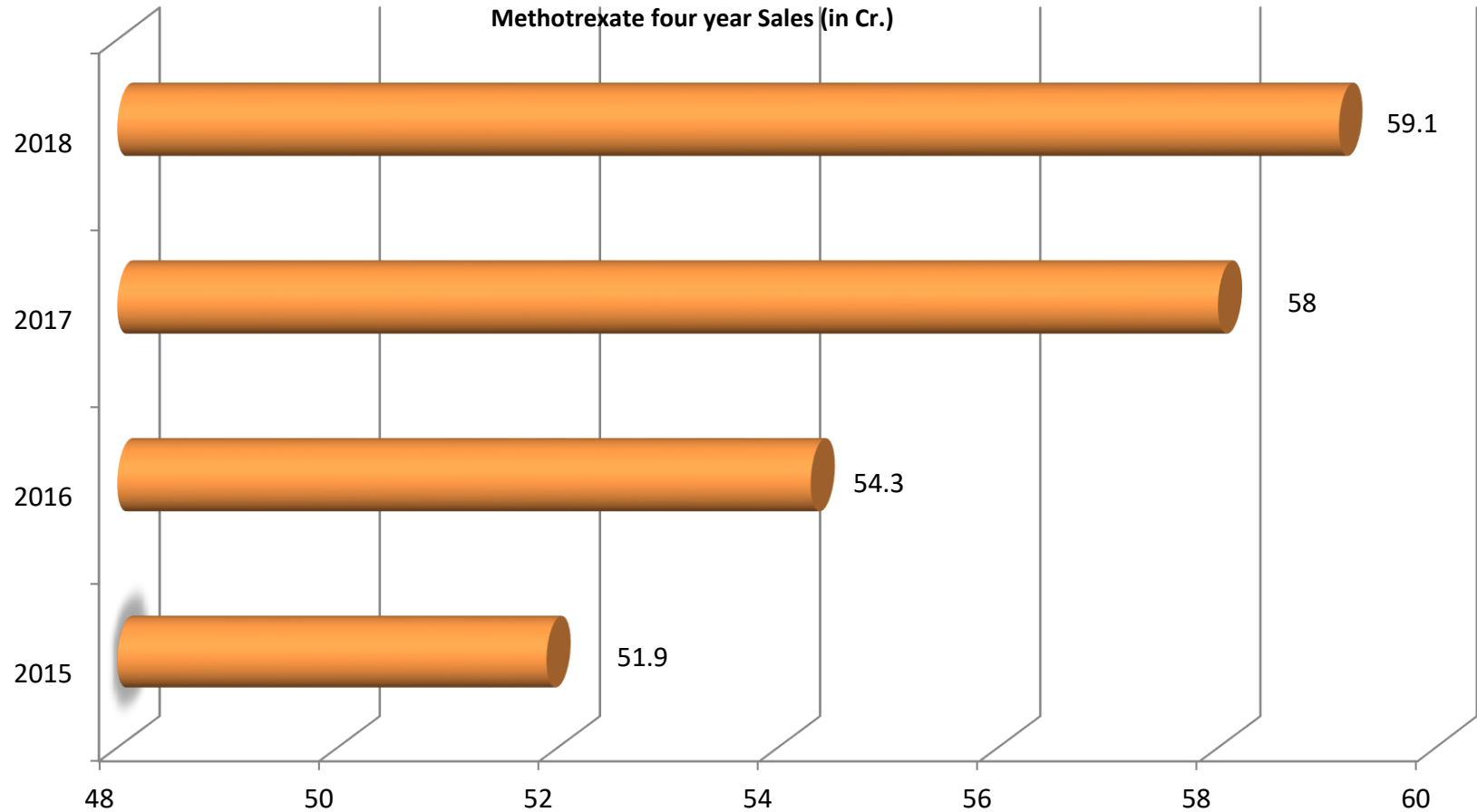


Growth in Monoclonal Antibodies

growth of Chemotherapeutic Molecules in(%)

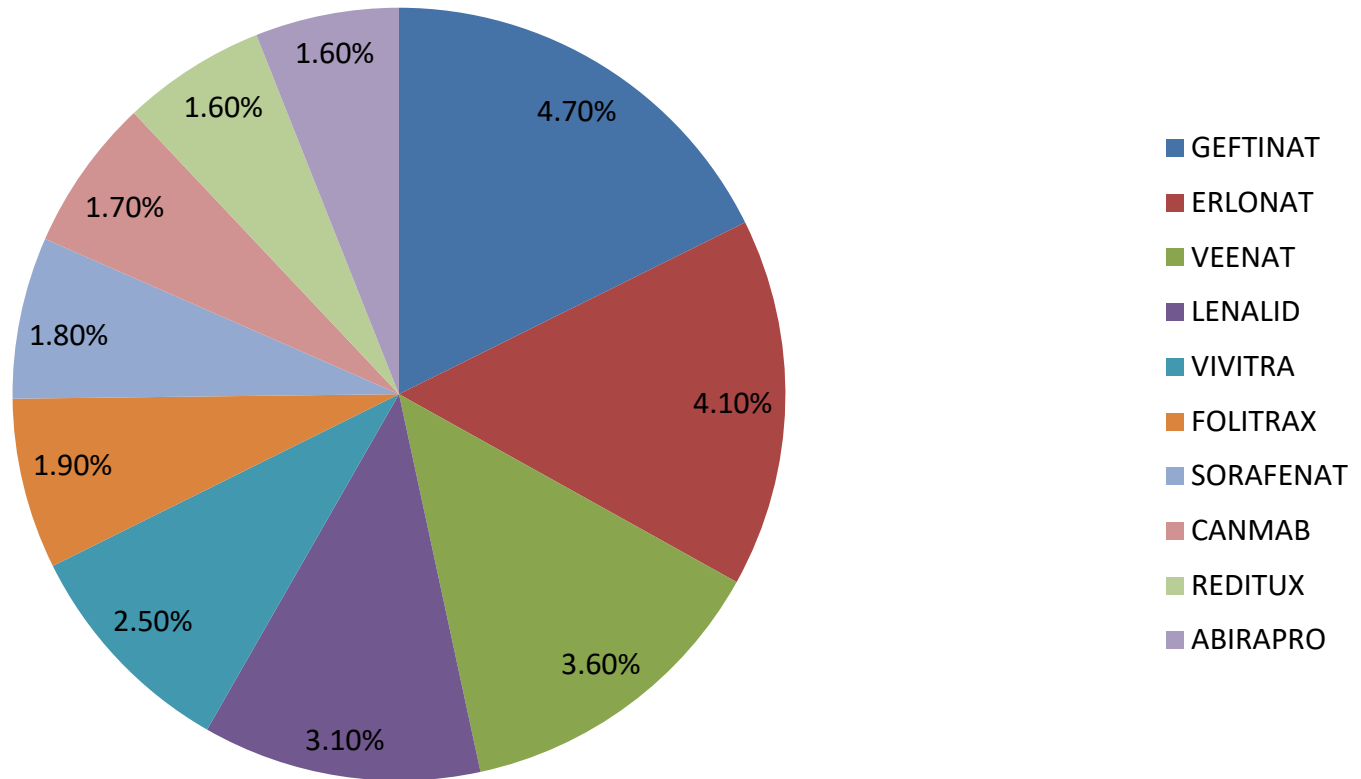


Methotrexate four year Sales (in Cr.)

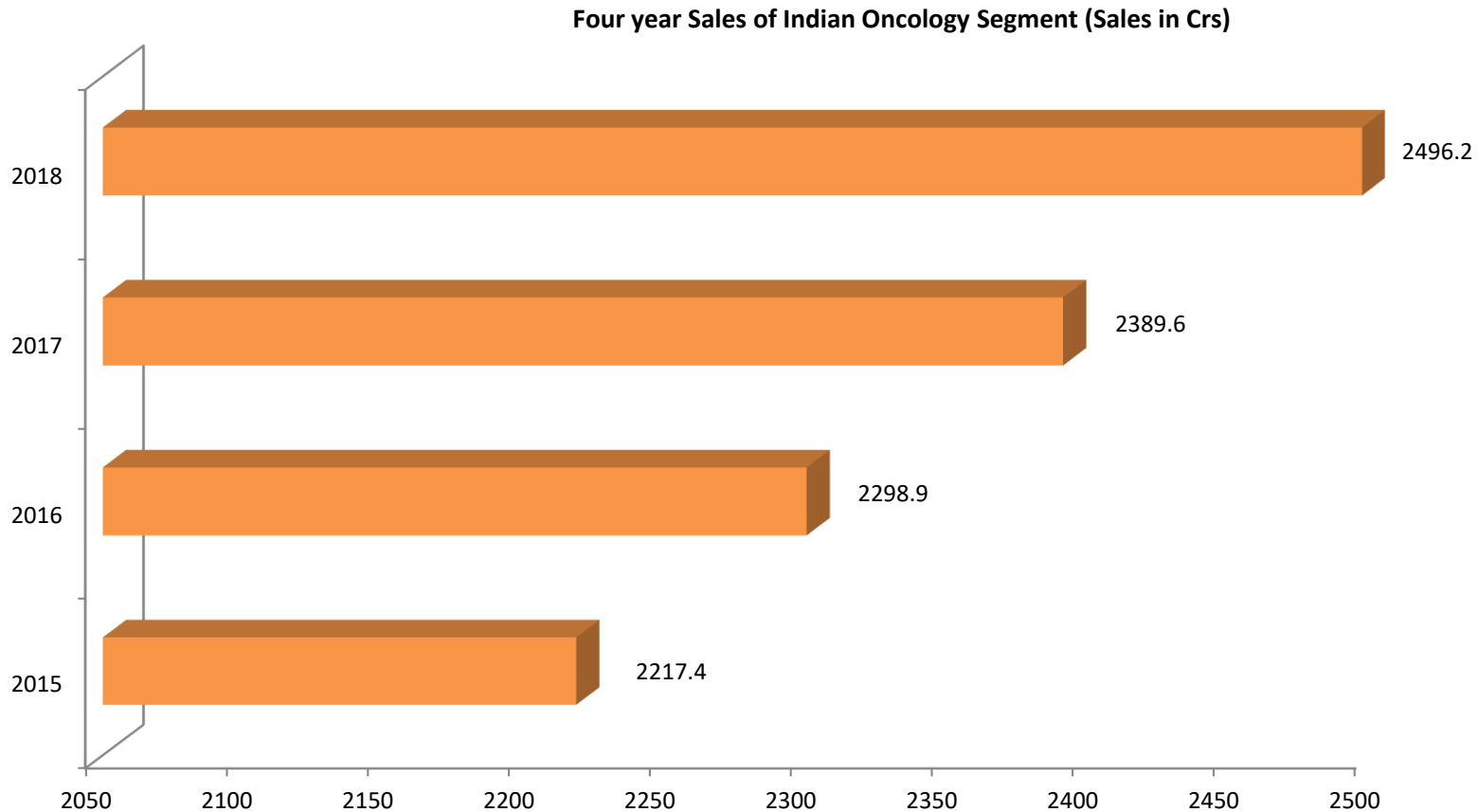


Market Share of Top 10 Oncology Brands

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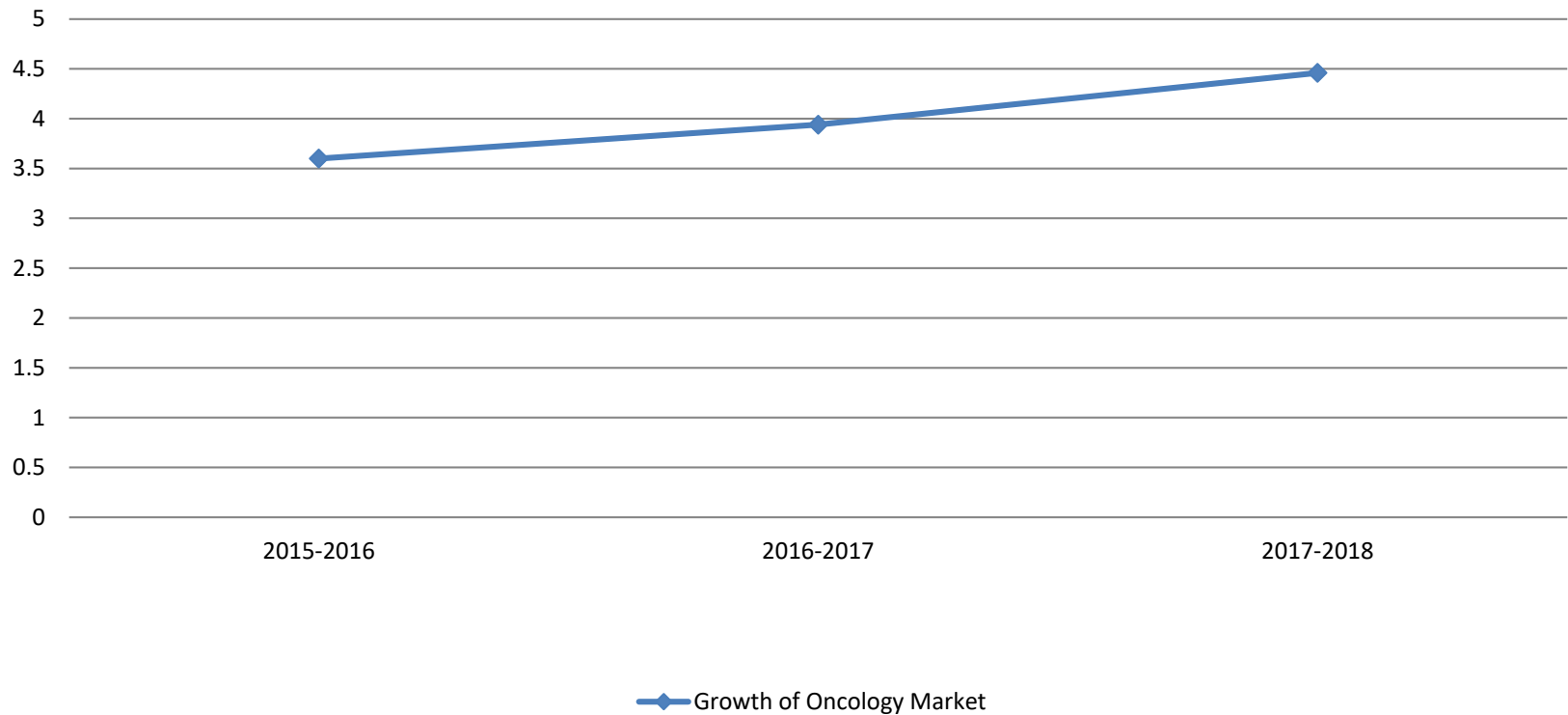


Four year Sales of Indian Oncology Segment (Sales in Crs)



Growth of Oncology market in India

Growth of Indian Oncology Market



Growth of Biologics(Monoclonal Antibodies)

Molecules	Growth
REGORAFENIB	172.4
ANTITHYMOCYTE IMMUNOGLOBULINS	74.6
TRIPTORELIN	24.5
SUNITINIB	154.6
CRIZOTINIB	178.9
CETUXIMAB	286.7

Growth of Small Molecules

Molecules	growth
GEFITINIB	-20.7
PACLITAXEL	-10.7
IMATINIB MESYLATE	-10.9
MYCOPHENOLATE MOFETIL	-6.7
ERLOTINIB	8.9
DOCETAXEL	-36.4
SORAFENIB	-4.1
TACROLIMUS	8.3

Conclusion

- Its very unfortunate that new types of cancers are on the rise in India, but Oncology market in India has also caught up the trend and its growing with fast Pace.
- Oncology is the growing market in Indian Pharmaceutical Industry despite Its low growth rate indicating higher costs of medicines is incurred for patients.
- **The current trend of growth in Oncology Drugs has shifted from Chemotherapeutic drugs to Monoclonal Antibodies (MAB) as Sales of (MAB) is growing with much faster rate than Chemotherapeutic drugs**
- Value Growth of Oncology Market for a year from 2017 to 2018 = **4.5 %**.
- Total Units Sold in May 2017=**33,689 (in Thousand)**.
- Total Units Sold in May 2018= **30,135 (in Thousand)**.
- Unit Growth of Oncology Market=**11.79 %**.

Thank You