

PRESENTATION

A market trend analysis of anti-diabetic pharmacological agents in India and a recapitulation of the disease diabetes in the Indian pharmaceutical market.

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ACKNOWLEDGEMENT

I Would like To take this opportunity to express my gratitude and deep regards to my teachers/mentors Prof **DR. SAURABH KUMAR BANERJEE** and **MRS KOMAL KAVAIYA** . For their guidance, monitoring and constant encouragement throughout the course of this Internship/Dissertation. The blessing, help and guidance given by time to time shall carry me a long way in the journey of life on which I am about to possess.



DR. SAURABH KUMAR BANERJEE



MRS. KOMAL KAVAIYA

ORGANIZATION PROFILE

Brandcare Medical Advertising and Consultancy Pvt LTD is an agency that specializes in brand management for pharmaceutical giants and performs the following Objectives.

- **Pharmaceuticals**

- **Consumer Health**

- **Diagnostics**

- **Nutrition**

- **Health Devices**

- **Health Facilities**

MODULES OF THIS INTERNSHIP

01.

AIM-

A market trend analysis of anti-diabetic pharmacological agents in India and a recapitulation of the disease diabetes in the Indian pharmaceutical market.

03.

Research & Methodology

- Study Setting – Brandcare
 - Study Duration -3 Month
 - Study Design-Cross Sectional Study
 - Study Population – Paediatrician
 - Sample Size – 60
 - Sampling Method -Purposive Sampling
 - Data Collection – Structured Question & Interview with
 - Doctor survey
 - Chemist survey
 - Patient survey
- 1) This survey has been conducted in a busy locality and with doctors having large OPD sessions and patient numbers
- 2) Data collection through intellectual Documents and Research articles and journals.
- 3) Data collection through various online platforms.
Like PubMed, 1mg, practo ,Docintosh.
- Data Analysis Technique –MS-Excel

02.

Objectives:

- To study the market scenario for the anti-diabetic Medicines With reference to survey data, market data and market trends W.R.T Competitors market share.
- To establish the data for the launch of new product so that this data can be used as a tool to use in a new product launch.
- To create a marketing strategy for the Anti-diabetic medicine

❑ Current Situation of IPM 2019-20 & Healthcare Industry

2019 ANALYSIS

01

Political: -

1. Affordable medicines under PMBJP led savings of Rs.1000 cr. For Indian citizens in FY19.
2. Cabinet approved the extension of the extant PPP and AHDs.

02

Technological: -

An electronic platform to regulate online pharmacies under a new policy.

03

Economical: -

1. Rs. 1 lakh cr for manufacturing pharmaceutical ingredients.
2. Patented drugs seg. 5.4% from 2018-2024.
3. "Pharma Vision 2020" aimed at making India a global leader in end-to-end drug manufacture.
4. Acute therapies continue to dominate the market by contributing 57% of the IPM.

04

Environmental: -

During Q2 FY2020, India witnessed outbreak of many diseases in many parts, aiding the growth of the Anti-infective segment.

2020 ANALYSIS

01

Political: -

1. Union budget (2020- 21), Rs. 65,012 cr & Rs.2,100 cr.
2. Healthcare scheme: - Ayushman Bharat Yojana.
3. Intensified mission Indra Dhanush (IMI).
4. Govt. expenditure on health sector grown to 1.6% of GDP in FY20.
5. Genetic diagnosis: - Indigen project by GOI.

02

Technological: -

1. Healthcare informatics
2. Health-wearables
3. Pharma genomics
4. Telemedicine
5. Gene-based therapy
6. Healthcare at home
7. Electronic health records (EHR)

03

Economical: -

1. Medical insurance.
2. Hospital merger & acquisitions has increased.
3. Hospital industry (2020)- Rs. 2182.2 cr.
4. GDPI by health insurance – 17.16% y-o-y to Rs. 51,637.84 cr (2020).
5. Medical tourism mkt. grown at 18% y-o-y.

04

Environmental: -

1. Pandemic impact – shortage of raw material.
2. Government intervention.
3. Increase issue of global warming.
4. Pollution- supply chain disruption & increase cost of raw material.
5. 1.98% increase in area under desertification.

2.Micro Analysis

About diabetes

- Aka diabetes mellitus, A group of diseases that result in too much sugar in the blood (high blood glucose).
- Patients with diabetes are classified as following: -

Type-1	Type-2	Prediabetes	Gestational Diabetes
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- Specialist for Diabetes patients: No of endocrinologist – 650
- Symptoms: - Early: (Hunger, fatigue, Peeing more, Thirstier, Dry mouth, itchy skin, Blurred vision) Type-1: (Unplanned weight loss, Nausea and vomiting.) Type-2:(Yeast infections, Slow-healing sores or cuts, Pain or numbness in your feet)

❑ Risk factors: -

Age	Genetics	Family history	Geography
Overweight	High BP	History of heart disease	PCOS

☐ Disease associated with Diabetes: -

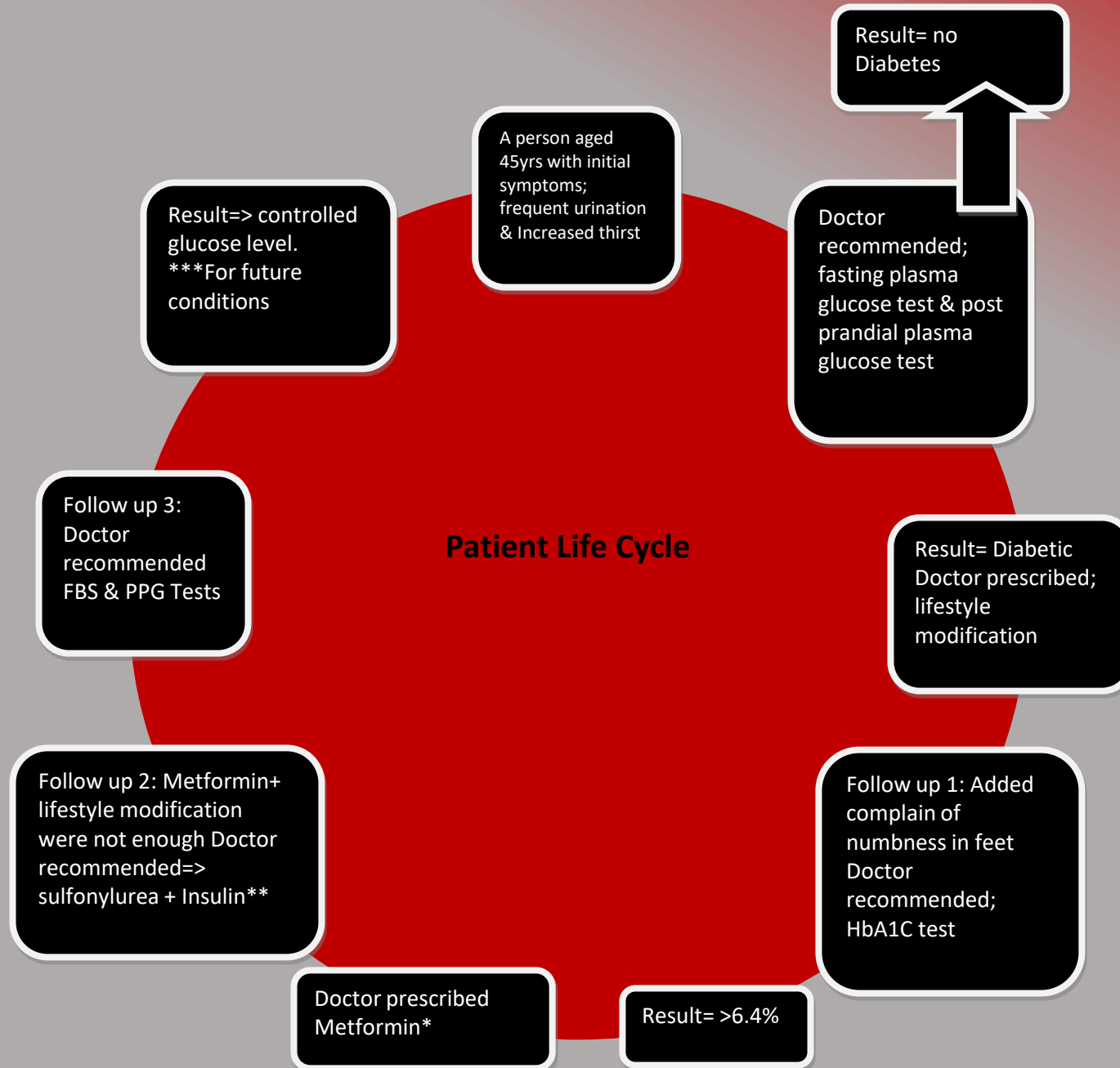
Cardiovascular disease
Nerve damage (neuropathy)
Kidney damage (neuropathy)
Eye damage (retinopathy)
Foot damage.
Skin conditions
Hearing impairment
Alzheimer's disease.

☐ Top therapy Brands:

Brand name	Rank	Value (Rs. Crore)
Mixtard (Novo- Nordisk)	1st	571
Lantus (Sanofi)	2nd	525
Glycomet (USV)	3rd	510
Galvus Met (Novartis)	4th	503
Janumet (MSD)	5th	495

❑ Market value

Class	Value(Rs.Crore)	GR	Molecule	Value(Rs.Crore)	GR
Gliptins	3,510	40%	Sitagliptin	1,300	8.60%
			Vildagliptin	950	25%
			Linagliptin	600	NA
			Teneligliptin	1073	NA
Biguanides	NA	NA	metformin	510	10.30%
Thiazilodinedione			Pioglitazone	100	NA
			Rosiglitazone	50	NA
SGLT-2	600		Canagliflozin	NA	NA
			Empagliflozin	NA	NA
Meglitinides			Repaglinide	NA	NA
			Nateglinide	NA	NA
Insulin	2,863	11.60%	Mixtard	571	8.60%
			lantus	525	NA
Sulfonylureas	NA	NA	Glimepiride	NA	NA
			Glyburide	NA	NA
			Glipizide	NA	NA
Alpha glucosidase inhibitor	NA	NA	Acarbose	NA	NA
			Miglitol	NA	NA
Combinations			metformin + glimepride	2,409	10.60%
			voglibose+metformin+glimepride	808	32.60%



- PPG= Post Prandial Glucose
- FBS= Fasting Blood Sugar

❑ SWOT Analysis

Strength i. Better glycaemic control than metformin monotherapy. ii. Increase and Improve insulin sensitivity in combination. iii. Most prescribed brand iv. 3 rd biggest molecule in anti -diabetic market v. Prolonged action and synergistic effect. vi. Significant reduction in LDL, Total cholesterol and Serum triglyceride than metformin + glibenclamide therapy.	Weakness 1. Late entrant
Opportunities i. Growing attention for diabetes. ii. Indian lifestyle is more westernised leading to more diabetes. iii. Diabetes market is growing at a rate of 16.7%.	Threats i. More potential new drugs and more efficient therapies. ii. People adoption for AYUSH therapy.

❑ Metformin

- Metformin is an antihyperglycemic agent of the Biguanides class, which inhibit the production of glucose in the liver. normal renal function.
- Metformin is the first drug of choice for the management of type II diabetes.
- It lowers blood glucose concentrations with improvement insulin sensitivity and cardiovascular safety.
For women with PCOS, it stimulates ovulation, it also reduces the risk of cancer and improve cancer prognosis.
- Current situation:
 - Rank – 3rd in anti-diabetes market
 - Value – Rs 510 crore ▪ Growth rate – 10.3%
 - Total combinations available – 52
 - Total brands available – 500+

- ❑ **Objectives:** - 1. To enhance the value of brand 10 crore by year 2021-2022.
2. To be among top 10 brands in Indian Pharmaceutical Market.
3. To be among top 3 therapy trends.

❑ **Brand Vision:** - We make people life free from diabetes and all its burdens by protecting them from the ill effects of glucose in blood.

❑ **Marketing Objectives:** -

Year 1	Year 2	Year 3
successful brand launch by selling 1lac units	To double the growth by selling more than 1lac units	To be in top 10 brands of Anti-Diabetes market by 2023-24.

❑ Brand Introduction

- Brand name – Dime-ER
- Composition: -a) Metformin HCL + Glimepiride (500mg) (2mg) b) Excipients (q.s)
 - Class – Biguanides and sulfonylureas
 - Indication: It is used for the treatment of Type-2 Diabetes Mellitus.
- Dosage form – Tablets ➤ Packaging size – 10 Tablets
- Packaging type – Strips
- Dose/Strength - 2mg/500mg An Overview of Diabetes

❑ Brand Differentiating

Criteria: -

- Formulation: - Enteric coated controlled release tablet.
- Packaging: - Tamper evident seal and change in material from pvc to pvc/pvdc
- Marketing through: - CRMS and meetings.
- Digital platforms: - An introductory video of a product. customized messaging apps. Chat bots ➤ Hybrid mobile app for sales reps.
- Medical Reps CRM solutions.
- Patient centric: - Side effect management plan. Video training library. Confidential patient call review/feedback. Customized coaching guide. Mobile app push notification.
- Customer centric: - Personal meetings. Micro-sites. Mobile apps. Journals/Articles/Case studies. RSS feeds (Really simple syndication). DocPlexus (Global online community of Dr.).

❑ **Therapy Indication**

- It can be used to reduce cardiovascular risk factors.
- It can be used for cholesterol management.

❑ **Positioning:**

❑ **Therapy/ Patient Segmentation**

1. Age: - Above 45 years
2. Disease condition: - Type-2 Diabetes
3. Gender: - Male
4. Sub- Region: - Urban
5. Region: - Southern
6. Lifestyle: - Sedentary
7. Sleep Duration: - Long Sleep(>8hr)
8. Physical activity level: - Low
9. Social class: - General
10. BMI: - Obese
11. Alcohol consumption: - High
12. Tobacco consumption: - Smoking and chewing

Target customers	Need	Target Patients	Needs
1. Physicians 2. Endocrinologist	1. Less side effects 2. Less dose frequency with good therapeutic effect.	1. Type-2 Diabetes patients. 2. Age: Above 45 years 3. Urban people with sedentary lifestyle. 4. Obese people.	1. Less dose frequency. 2. Maintain adequate blood sugar level 3. Less side effects.

❑ Positioning statement: -

DIME-ER which is used to **increase the amount of insulin in body in order to lower the blood glucose level in Type-2 Diabetes patients** and provides **lesser side effects** like stomach irritation and prevents any enzyme present from dissolving in the acid environment of the stomach area because of **Enteric release technology in the tablet**

❑ Marketing strategies

❖ Typical marketing strategies

1. Market expansion.
2. Market share growth.
3. Niche marketing strategy

❑ Core Brand Strategy

- Market share growth/Penetration Strategy –

Levers

Increase market share

Acquire Maximum customers

Increase Repeat usage

❑ Deriving SBS from CBS

levers	Supporting Brand strategy		
Increase market share	Pricing strategy	Communication Strategy	Sales Force Strategy
Acquire Maximum customers	Medico Marketing	Data Generation	
Increase Repeat usage	Patient Education	Sampling Strategy	

❑ CBS – SBS – Tactical Plan

Levers	Supporting Brand Strategy	Tactical plan
Increase market share	Communication strategy	a) Communication on diabetes control b) Diabetes control with lesser GI irritation
Acquire Maximum Customers	Medico Marketing	a) CME's Programmes b) Partnership with portable companies.
Increase Repeat usage	Patient Education	a) Patient education camp b) Mobile app

❑ Tactical Plan Details

Tactical plan	Details
Communication on diabetes control	In clinic literatures
Communication on diabetes friendly diet	Posters, Diet plans
Communication to Dr. on molecule	CME's, Ad-boards, Webinars

❑ Communication Strategies

- Patient profile: -
 - A 45-year man with sedentary lifestyle having type-2 Diabetes.
- Therapy: -
 - Rx DIME-ER (Metformin + sulfonylurea combination therapy).
- Indication: -
 - Type-2 Diabetes
- Disease condition: -
 - Diabetes mellitus.
- Patient condition: -
 - A 45-year man with diabetes having frequent urination and thirst.
- Features to be addressed: -
 - Increase the level of insulin and lower the blood glucose level.
- Rational Benefits: -
 - Lowers the amount of glucose and helps body to use insulin better.

➤ Emotional benefits: -

- No interruptions in daily routine work.
- No impact on sexual relationship.
- No negative emotions such as anger, frustration, fear, anxiety.
- No increase in weight. • No difficulty in communication.

➤ Communication line: -

- A promise to steer right sugar level.

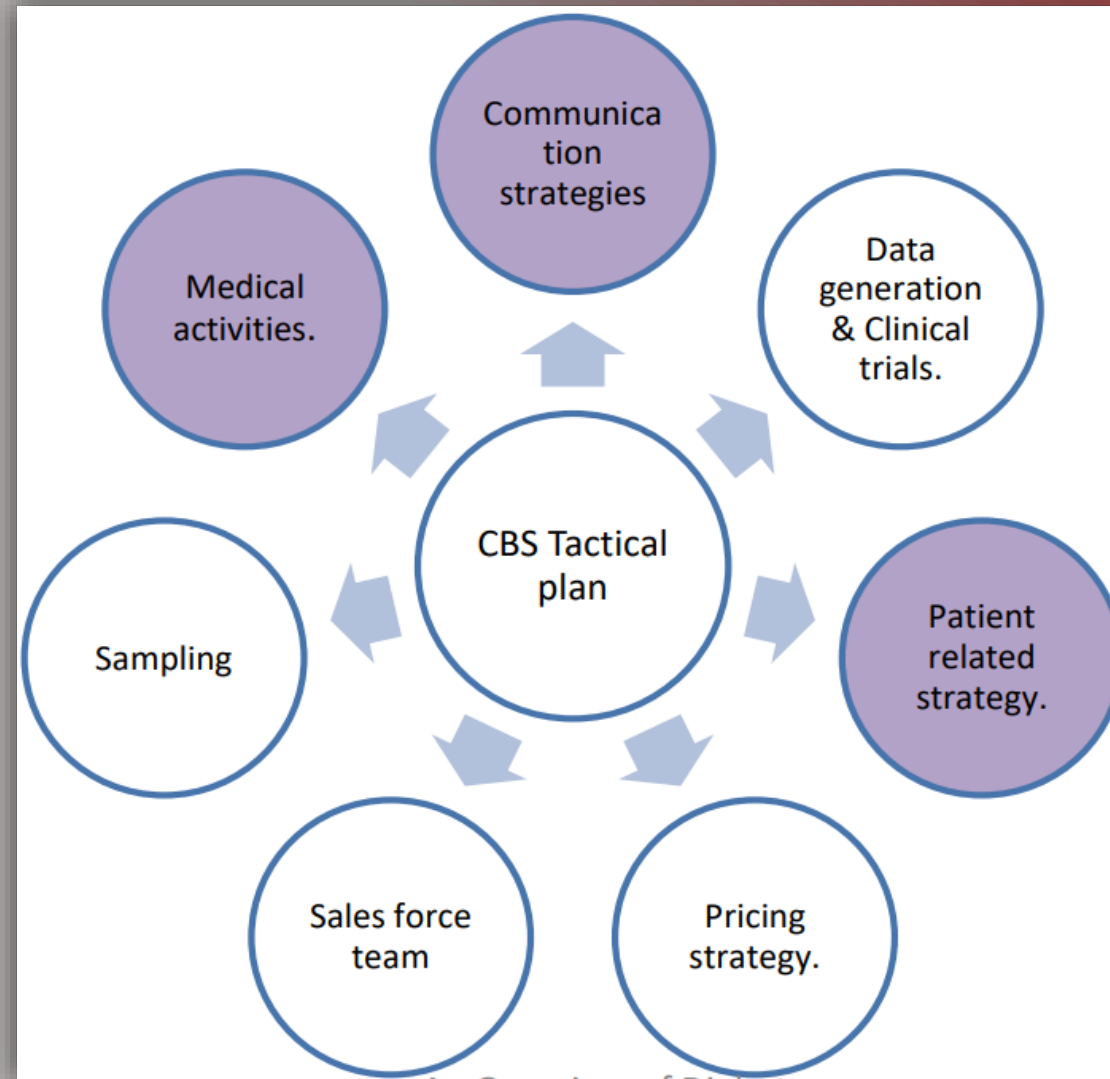
➤ Flyers with patient case studies.

☐ Medical Activities: -

1. CME's.
2. Sponsored online medical courses for doctors.
3. Webinars.
4. Launch meetings.
5. Online engagement programs.
6. Case study sessions.

☐ Patient Activities: -

1. Side effects management plan.
2. Video training library.
3. Confidential patient call review.
4. Free Diagnostic sessions at clinics.
5. Posters in the clinic for general awareness.
6. Customized free diet plan & guide, according to the disease condition.



Result and Conclusion

After a thorough evaluation and analysis of market data in this report, we have concluded that most diabetic drugs can be successfully marketed in India after reading the survey report and the market data analysis.



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