PRESENTATION ON
MARKET SIZING OF INDIAN INJECTABLE CONTAINERS MARKET BY VOLUME AND VALUE BY ANALYZING THE DYNAMICS FROM INDIAN DOMESTIC & EXPORT INJECTABLE DATA 2019-20
&
MARKETING ANALYTICS

Under Guidance:
Dr. Arpita Bhasak

Submitted by:
Vicky Jain

PharmaACE
Analytics Center of Excellence

IIHMR UNIVERSITY

PART I: SUMMER TRAINING PRESENTATION

MARKET SIZING OF INDIAN INJECTABLE CONTAINERS MARKET BY VOLUME AND VALUE BY ANALYZING THE DYNAMICS FROM INDIAN DOMESTIC & EXPORT INJECTABLE DATA 2019-20

INTRODUCTION

- The injectable drug delivery market to grow from USD 362.4 billion in 2016 to USD 624.5 billion by 2021, at a CAGR of 11.5% during the forecast period.
- These factors have increased the demand for devices such as safety syringes, prefilled syringes, and autoinjectors.
- Growing focus on targeted therapies and biologics, particularly around cancer, is increasing the need for generic injectable drugs.
- Prefilled syringe cartridges are designed to fit into specialized syringes, which are used to administer various fluid medications. The advantages of prefilled syringe cartridges are their convenience, affordability, accuracy, sterility, and safety.

OBJECTIVE

1. **To identify the type of containers used for injectable market with respect to molecules and their market volume & value.**
2. **To know the market volume & value of the injectable containers according to domestic and export market.**
3. **To identify the injectable molecules and their market volume & value.**
4. **To identify the molecules under segmentation of biologics, biosimilars & biologic generics.**

KEY LEARNING

Working on live project provides access of open corporate environment which offers following key learning:

1. Learning of working in live project according to the client requirements.

2. Dashboard Preparation.

3. Adhering to the timeline.

4. Learning of MS Excel and SQL tools.

5. Knowledge of injectable market. Knowledge of containers market used for injection.

RESEARCH METHODOLOGY

❖ **Sample Design- Qualitative & Quantitative research approaches were taken.**

Qualitative Approaches:

- Data Cleaning
- Data Tagging
- Harmonization

Quantitative Approaches:

- Volume and projected Volume calculation.
- Unit rate in INR and USD calculation
- Value of product.

❖ **Data Collection Method- Primary data were received from the company.**

❖ **Duration- 2 Months**

❖ **Software Tools used: MS Excel, MySQL**

CAVEATS/ASSUMPTIONS

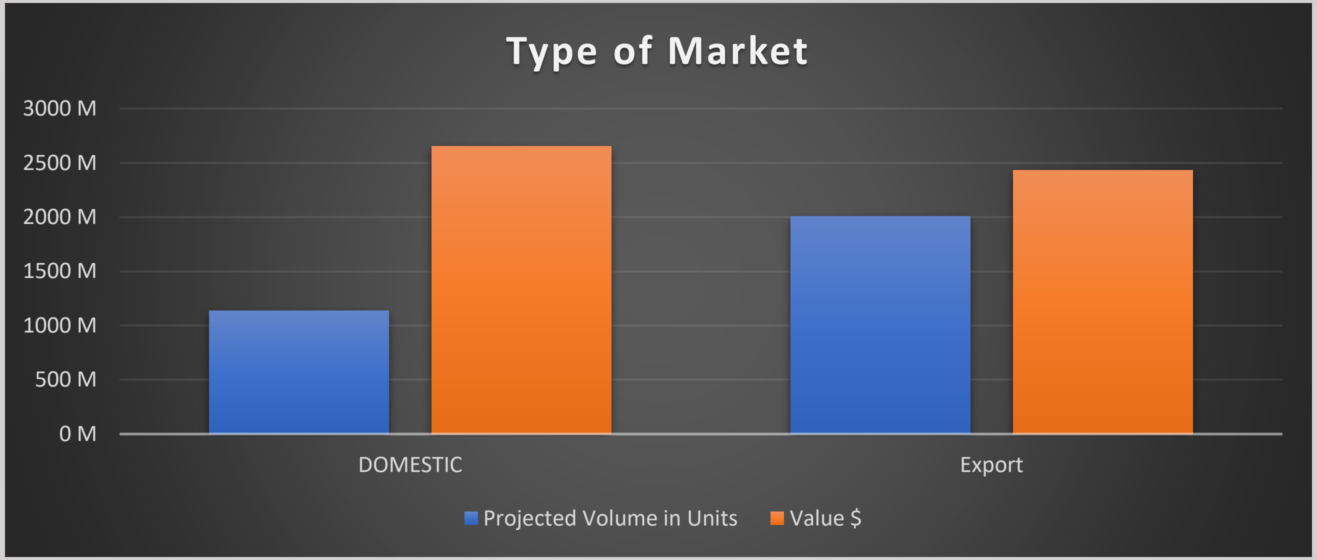
Exclusion:

- **Plastic containers are excluded from the market definition.**
- **Ampoules are not included into the market definition.**
- **Large volume parenteral are also excluded.**
- **Not included the products of Amanta Pharmaceuticals products.**

Inclusion:

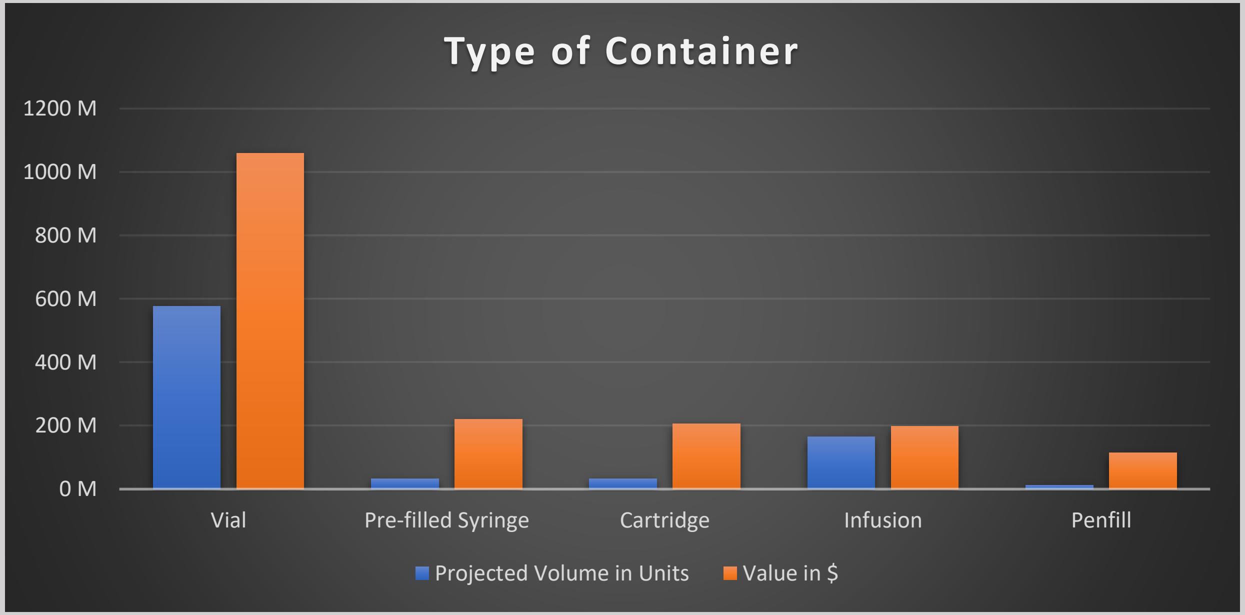
- **In type of materials, injection (whose product description cannot be identified) may be vials, pen-fills, pre-filled syringes, glass bottles, infusions, or cartridges.**
- **Projected volume is derived from unmapped item products volume by dividing it by total volume and adding one i.e. 1.39.**
- **All mAbs are considered as biologic.**
- **All Vaccines are considered as biologic except Anti Serum / IGG**

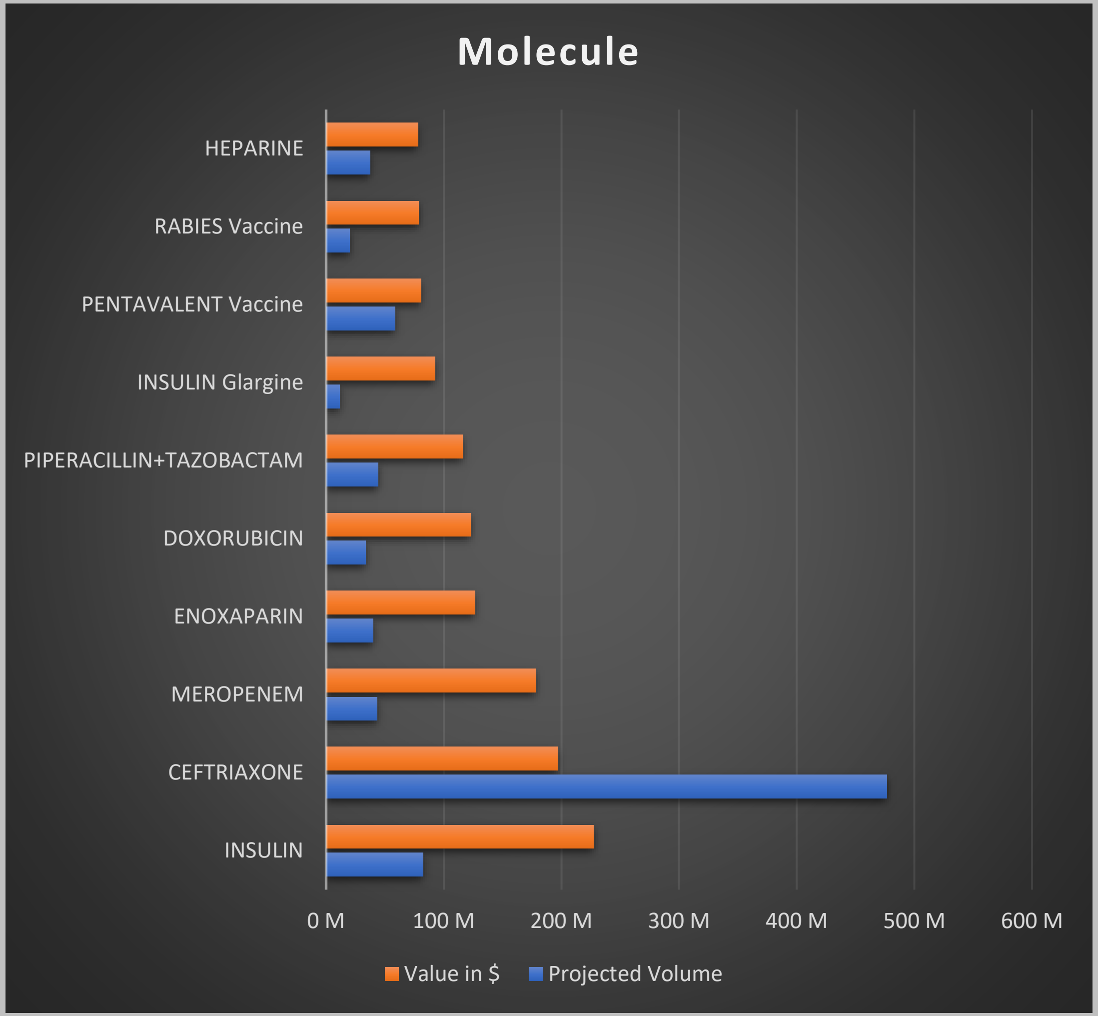
DATA INTERPRETATION



Graph 1 1: Type of markets and their projected volume and value

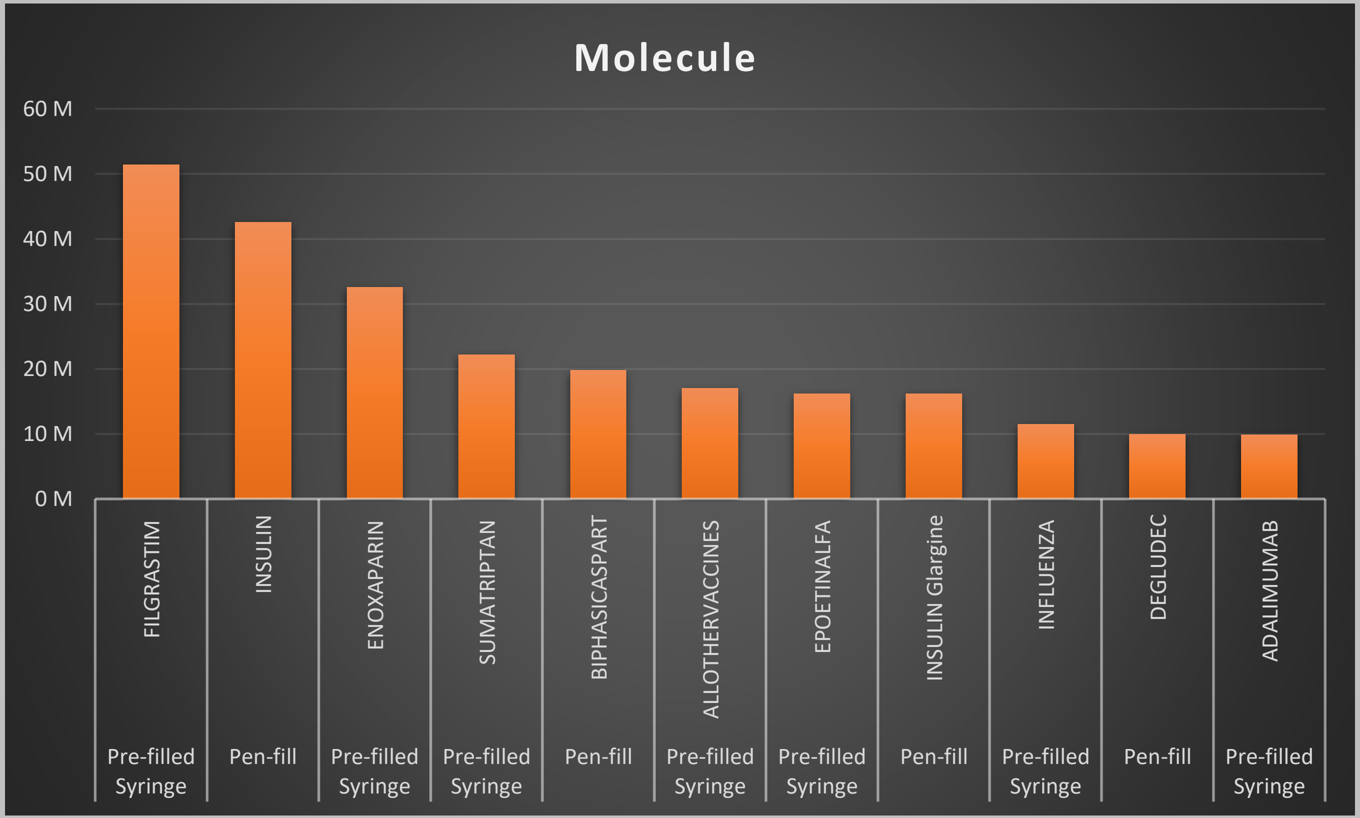
Graph 1 2: Type of containers used in injectable market and their projected volume.

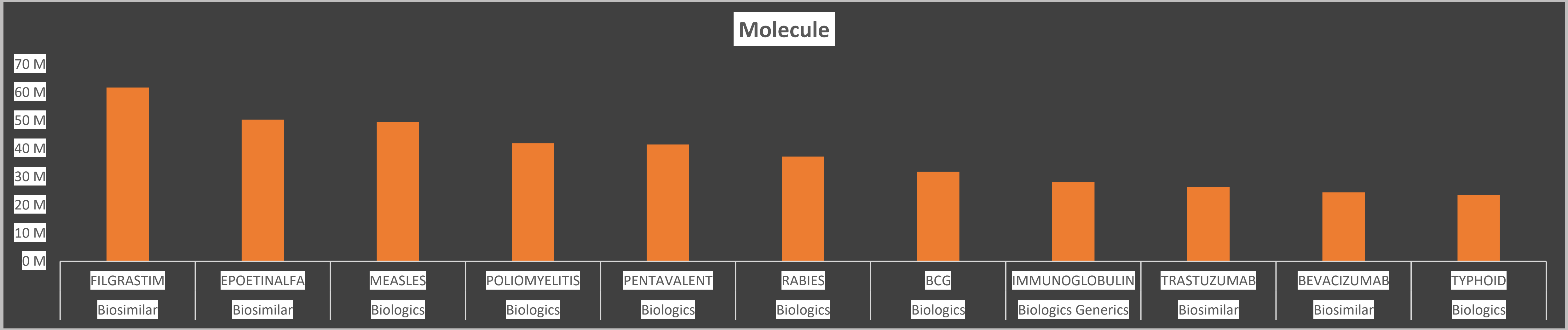




Graph 1 3: Top injectable molecule with their projected volume & value market 2019-20.

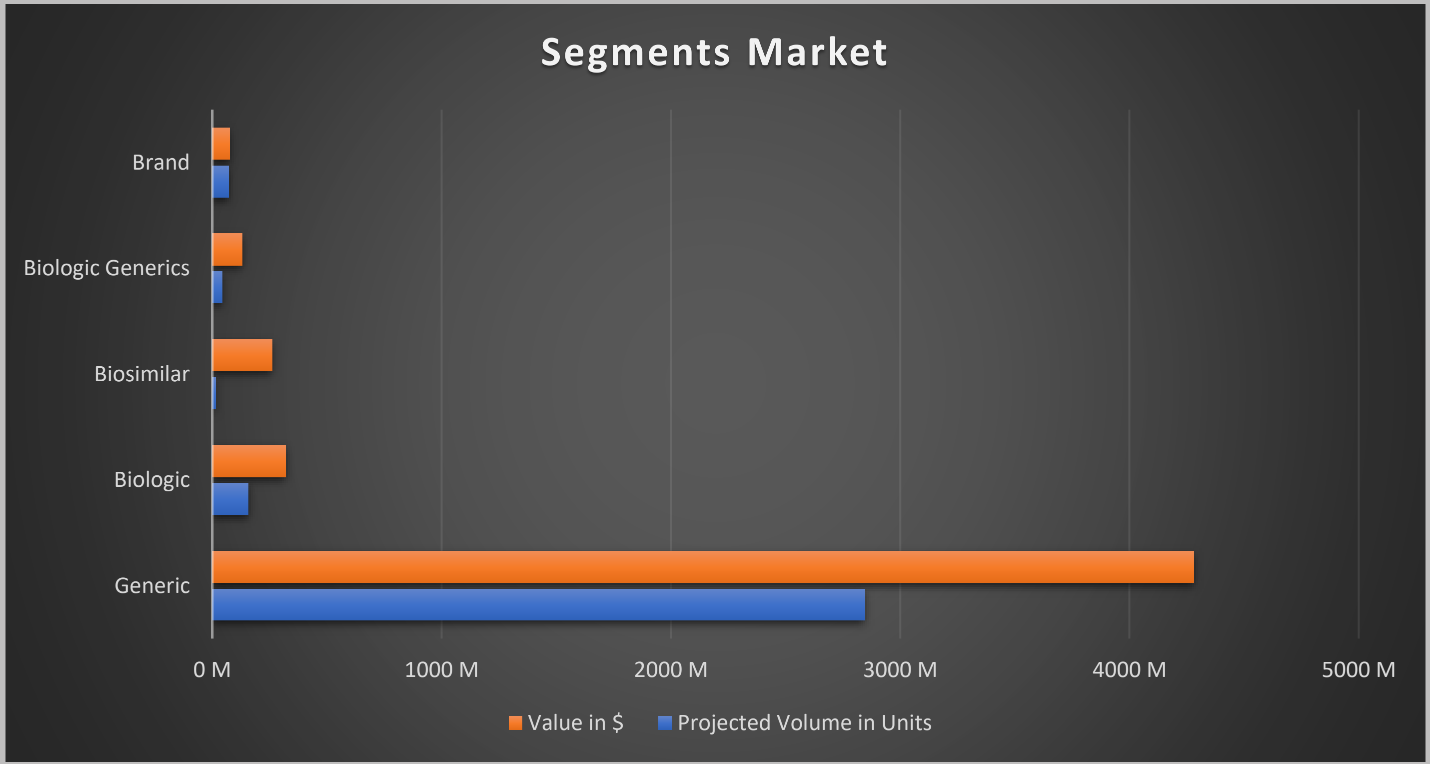
Graph 1 4: Pen-fill & Pre-filled syringe containing top molecule and their market volume

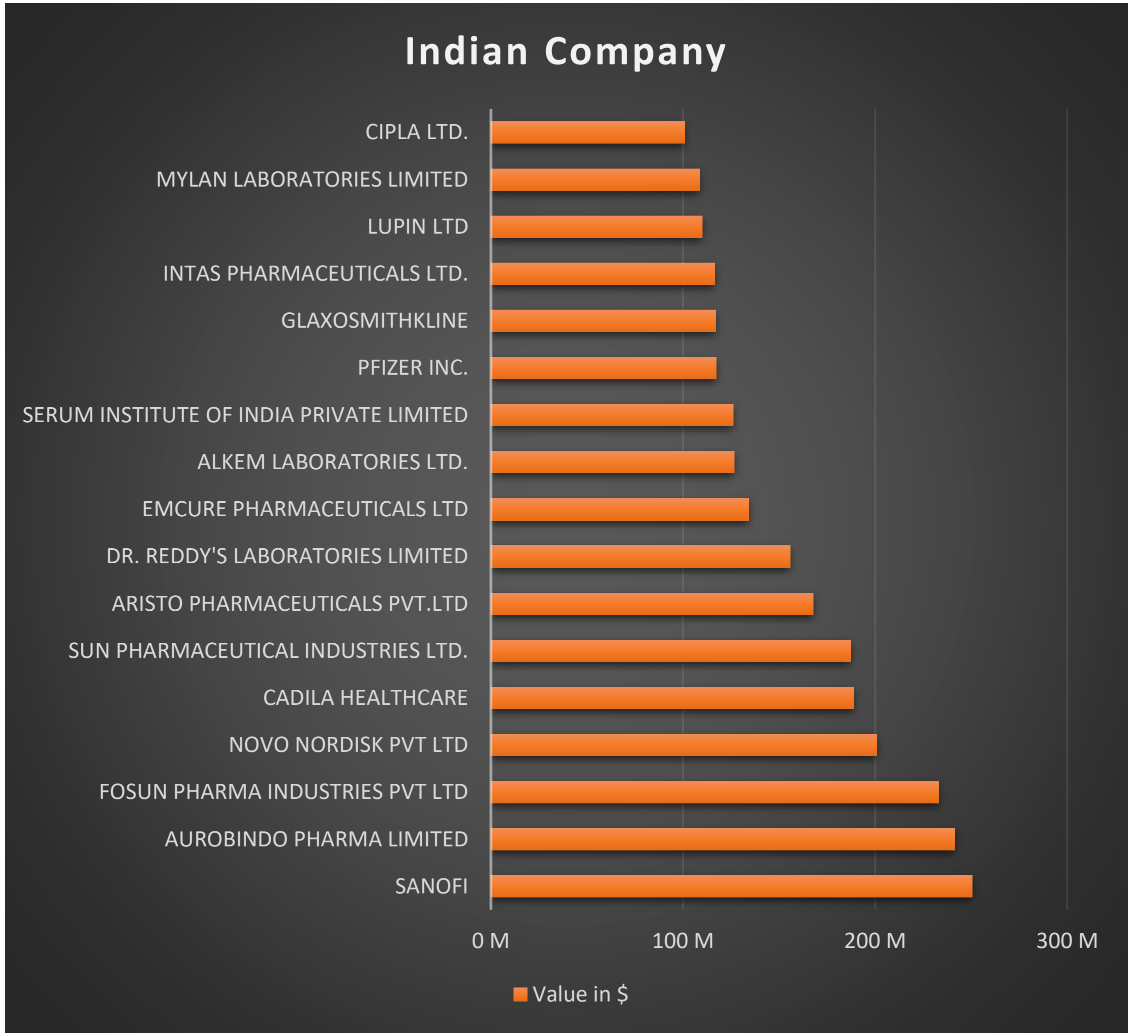




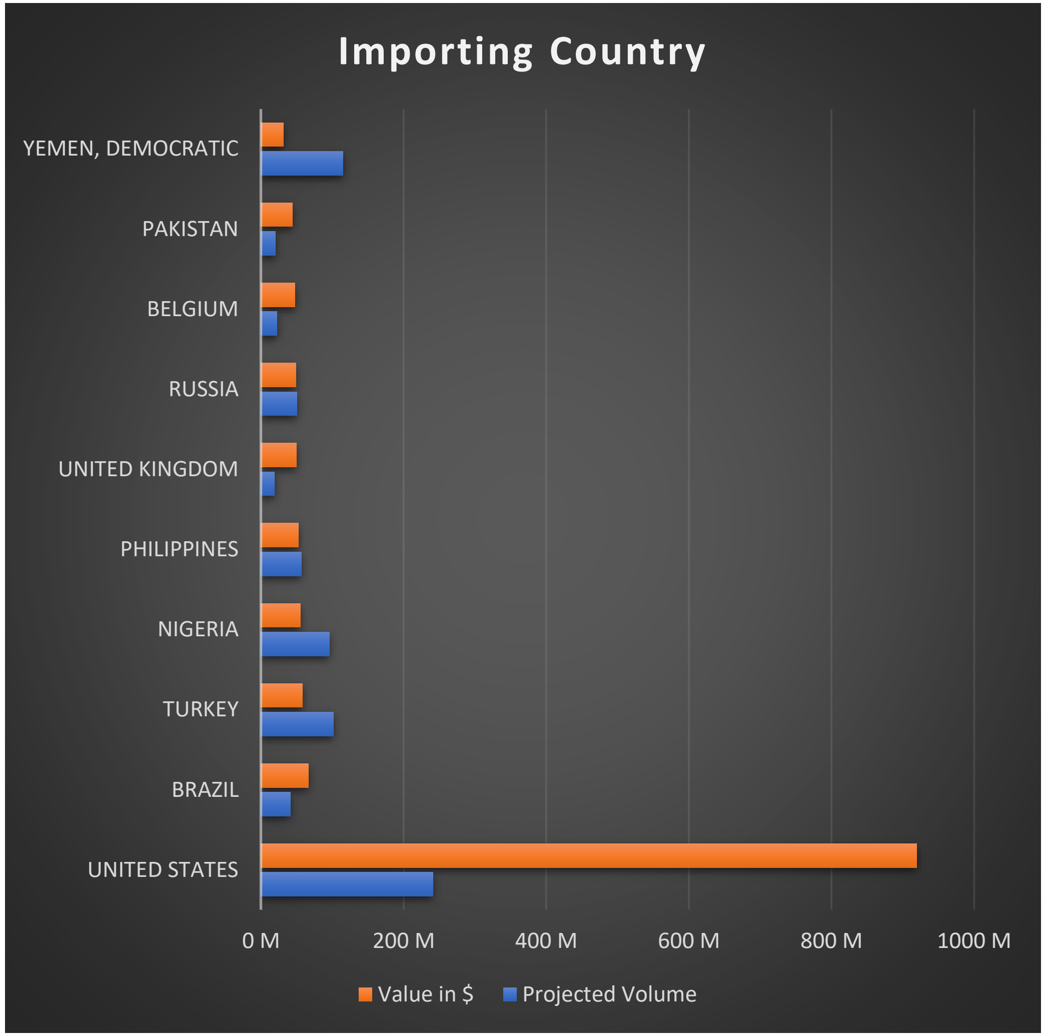
Graph 1 5: Top molecule and their market volume & value according to segments

Graph 1 6: Injectable market segments into biologics/biosimilar s/generics/brand.

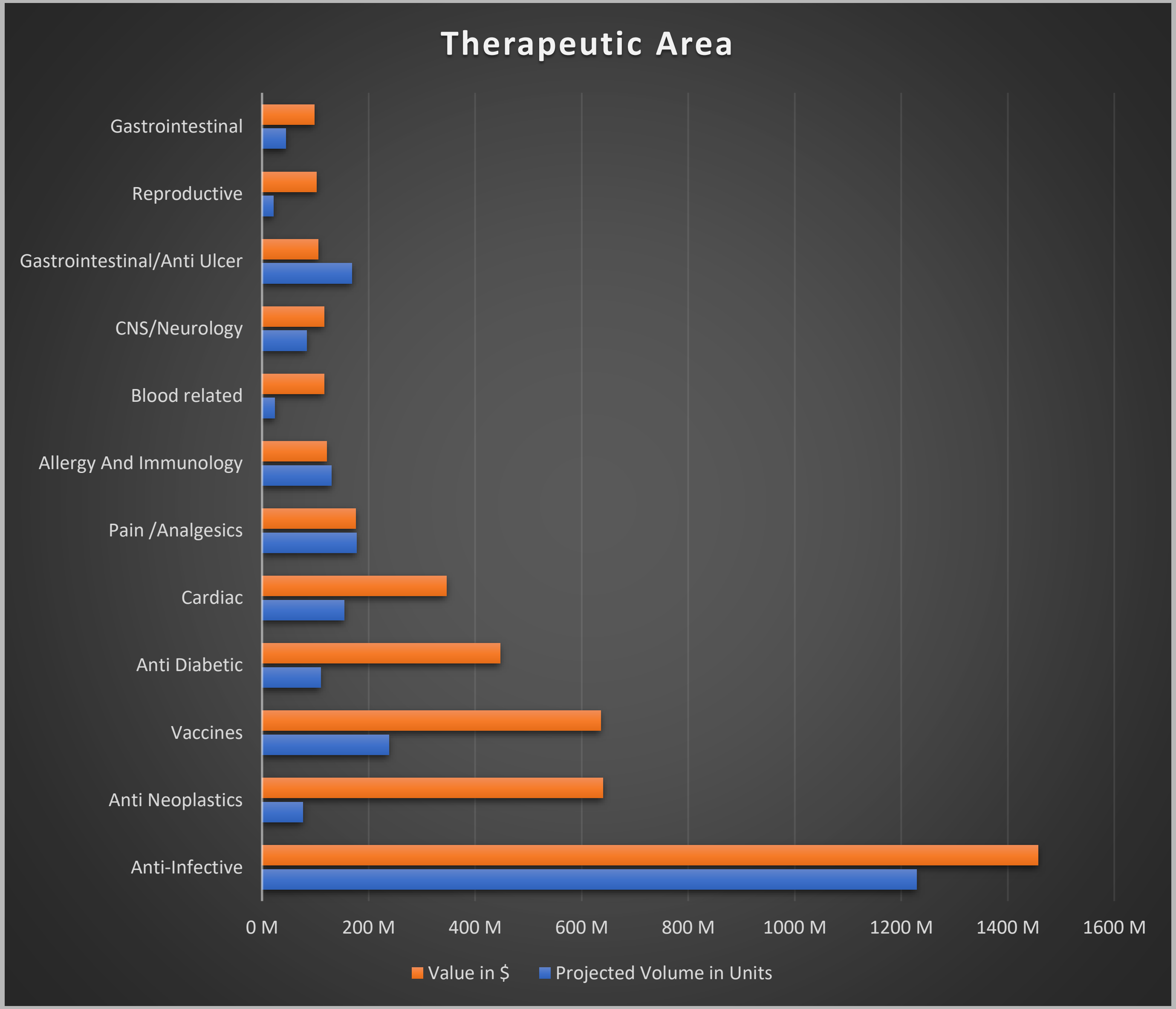




Graph 1 7: Company selling injectable material with their value



Graph 1 8: Injectable material exported to country with their volume & value.



Graph 1 9: ***Therapeutic area and their market value and volume.***

DASHBOARD

LINK:
https://1drv.ms/x/s!AqV3_RshqeITixakRj2eUJ99bZ-n?e=TvMcSw

CONCLUSION

- The export rate is 65% when contrasted with domestic which is 35% with an anticipated volume of approx. 2 billion units and 1 billion units, respectively.
- The market of vial is most extreme followed by infusion while it is seen that cartridge, pre-filled syringe, pen-fill, and glass bottles are just around 1-2% of the absolute anticipated volume and value. The anticipated volume of vial is more than 570 million units and infusion are more than 165 million units. The market value of vials is more than $1 billion.
- Insulin are generally pressed as pen-fill and Filgrastim as pre-filled syringe with market value of $43 & $51 million, respectively.
- The main division is Generics (approx. 90%) having volume of 3 billion units and value of $4281 million is seen as sent out the most followed by the biologics. While the interest in brands and biologic generics are expanding from earlier years.
- The anticipated volume biologics, brands and biologic generics is between 150 million to 100 million units. Biologics and biosimilars market value are $321 and $260 million, respectively.
- The molecule ceftriaxone is the most elevated. The anticipated volume of ceftriaxone is more than 447 million units. India immunization showcase is approx. 50 % of complete worldwide market.
- The biggest shipper is the US with the market volume of approx. 241 million units and $919 million market value.
- The top administration to trade its injectable containers is Sanofi with the value of $251 million. Aristo Pharmaceuticals have highest market volume of 181 million units. Aurbindo, Fosun Pharma, Novo Nordisk, Alkem, Serum Institute, Cadila, Zydus are the top selling administrations of injectable container markets of each between $225 to $125 million market value.
- Injectable's therapeutic area are majorly distributed in anti-infective market with $1457 million. Anti-neoplastic share the highest market volume with 1229 million units. Vaccines are majorly sharing the market volume with 238 million units.

Part- II COURSE PRESENTATION ON MARKETING ANALYTICS

DESCRIPTIONS:

- Conducted by the Darden School of Business at the University of Virginia, gives the tools to measure brand and customer assets, understand regression analysis, and design experiments to evaluate and optimize marketing campaigns.
- Enables marketers to measure, manage and analyze marketing performance to maximize its effectiveness and optimize return on investment (ROI).

OBJECTIVES:

- It helps with the learning to build and define a brand architecture and to measure the impact of marketing efforts on brand value over time.
- To measure customer lifetime value and use that information to evaluate strategic marketing alternative
- To design basic experiments so that you can assess your marketing efforts and invest your marketing dollars most effectively
- To set up regressions, interpret outputs, explore confounding effects and biases, and distinguish between economic and statistical significance.

LEARNING METHODOLOGY

- Main source of learning are pre-recorded videos on various topics related to the course of Marketing Analytics.
- Each module contains minimum three quiz and are mandate with maximum 80% passing grades for the evaluation criteria.
- At the end of module, submission of assignments helps to build the clear concept and a better understanding of the module.
- Discussion Forums – one of the most attractive part of this course where the viewpoints can be shared, different topics can be debated related to a particular module and get to gain some extra knowledge through the views and ideas shared by other students.
- Readings – At the end of each chapter reading sources have been shared to enhance our learning experience.

COURSE CONTENT

- **The Marketing Process:** The chapter cover Marketing Fundamentals, Product, Pricing and Channel Decisions, Building Strong Brands and Communication Strategy
- **Metrics for Measuring Brand Assets:** This module gives the tools to measure brand and customer assets, understand regression analysis, and design experiments to evaluate and optimize marketing campaigns.
- **Customer Lifetime Value:** This module shows the economic factors behind pricing based on cost and the pros and cons of a cost-based pricing approach. It teaches to calculate three types of price elasticities to determine the impact of price on demand. Analyze and apply different pricing models cost-plus pricing, Marginal cost-plus pricing, Peak-load pricing, Index-based pricing and evaluate the impact of channel intermediaries and customer lifetime value on pricing
- **Marketing Experiments**: This module explores to design basic experiments so that it can assess marketing efforts and invest marketing dollars most effectively. It helps to avoid a gap between test results and field implementation and explore web experiments that can be implemented cheaply and quickly.
- **Regression Basics:** This chapter help to describe regressions, the tools which are used in marketing. And interpret integration outputs in marketing and regression allows to understand customer behavior and connect them to business and marketing decisions.

KEY LEARNING FROM THE COURSE

Helps with the learning to view marketing phenomena and processes in ways that are

amenable to quantitative analysis.

Expose to several sexamples of the successful use of marketing analytics.

Demand forecasting using customer-base models and statistical approaches

Market segmentation methods and best practices for identifying potential customer segments and focused targeting.

Computation of Customer Lifetime Value for analyzing customer, brand loyalty and forecasting revenue in the short and long run

Factors to consider while designing and introducing new products to the market

Calculating Optimal Pricing for products and services to get the best ROI

Assessing Marketing ROI for making better and data-driven decisions.

THANK YOU