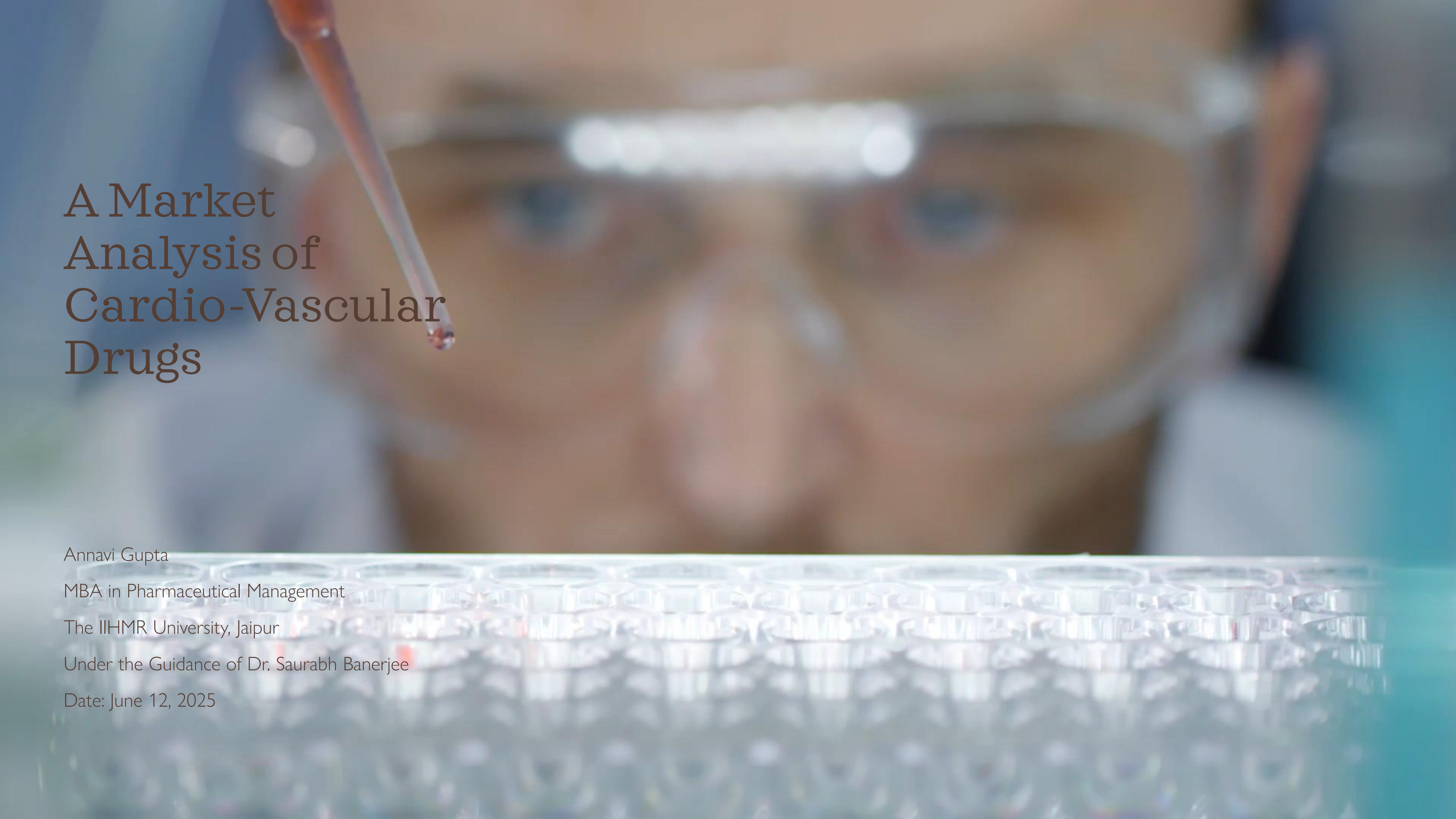

A Market Analysis of Cardio-Vascular Drugs

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Abstract

- This study analyzes the Indian cardiovascular drug market, projected to grow from INR 12,400 crore in 2021 to INR 16,900 crore by 2025, at a CAGR of 8.1%.
- It includes qualitative interviews with 45 cardiologists and 25 KOLs, and secondary data from WHO, ICMR, etc. Growth potential exists, particularly in tier-2 cities, but price sensitivity and regulatory issues remain challenges.

Introduction

- • High Disease Burden: CVDs lead mortality in India.
- • Growing Prevalence: Driven by lifestyle, diabetes, obesity.
- • Market Dynamics: Competitive with global/domestic firms.
- • Focus on Innovation: Emphasis on affordable and novel drugs.

Review of Literature

- WHO: CVDS = 28% DEATHS IN INDIA
- MARKET: INR 12,400 CR IN 2021, 8.1% CAGR
- PREVALENCE: HYPERTENSION (28.1%), CAD (10-15%), DIABETES (77M)
- DRIVERS: LIFESTYLE, AGING, HEALTHCARE IMPROVEMENTS
- GOVT: FDI, AYUSHMAN BHARAT DRIVING ACCESS

Rationale, Aim & Objectives

- • Public Health Concern: Escalating CVDs in India
- • Primary Line of Defense: Drugs are key to treatment
- Aim: To analyze market size, trends, and competition
- Objectives:
- - Estimate market size
- - Identify key trends
- - Assess competitors

Methodology

- DESIGN: DESCRIPTIVE STUDY
- TOOLS: QUESTIONNAIRE, INTERVIEWS
- SAMPLE: 45 CARDIOLOGISTS, 25 KOLS
- DATA: PRIMARY (INTERVIEWS), SECONDARY (WHO, ICMR, PUBMED)

Findings: Market Size & Forecast

- • 2024: US$ 3.3 Billion
- • 2034: US$ 10.2 Billion (CAGR 11.5%)
- • Robust growth driven by demand, lifestyle factors, and urbanization

Market Segmentation (2024)

- DRUG TYPE: ANTIHYPERTENSIVES (34%)
- DISEASE: HYPERTENSION (37%)
- ROUTE: ORAL (54.7%)
- CHANNEL: RETAIL PHARMACIES (44.6%)

Competitive Landscape

TIER 1: SUN PHARMA, CIPLA, TORRENT (45-55%)

TIER 2: DR. REDDY’S, LUPIN, ABBOTT (25-35%)

TIER 3: GLENMARK, USV, JB CHEM (15-25%)

Challenges & Opportunities

Challenges: Price sensitivity, regulation, rural access

Opportunities: Tier-2/3 cities, awareness campaigns, FDC growth

Conclusion

- INDIAN CARDIO DRUG MARKET IS GROWING FAST (CAGR 11.5%)
- DRIVEN BY DISEASE BURDEN AND EXPANDING HEALTHCARE ACCESS
- STRATEGY: FOCUS ON AFFORDABILITY, INNOVATION, ACCESSIBILITY

Thank You