CURRENT AND EMERGING TRENDS ALONG WITH COMPETITOR ANALYSIS ON "DAPAGLIFLOZIN"

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MANKIND PHARMA

Mankind Pharma is one of India's leading pharmaceutical company, headquartered in **Delhi** and founded by **R.C. Juneja & Rajeev Juneja** in **1991**. Mankind aspires to become customer-centric company and strive to provide accessible and affordable healthcare to all sections of the society. Today, Mankind operates in **34+ countries across 6 continents**. The company has products in therapeutic areas ranging from antibiotics to **gastrointestinal, cardiovascular and erectile dysfunction medications**. In **2007- 10**, Mankind entered consumer healthcare by launching **Manforce** and **Prega News**. Mankind Pharma has 23 World class USFDA & WHO-cGMP compliance manufacturing units and **3 State of Art R&D** centers in India. It became the first Indian company to launch 'Dydrogesterone' in 2018. It is the **4th largest pharma company in India** built on its strong values. Mankind has grown exponentially to become India's **No. 1** company as per Prescriptions.

MISION

To be able to provide cost-effective, innovation based superior quality pharmaceutical products across the globe, to improve the lives of the patients.

VISION

To be global pharmaceutical company, most admired for its Affordability, Quality and Accessibility of products.

Figure 1

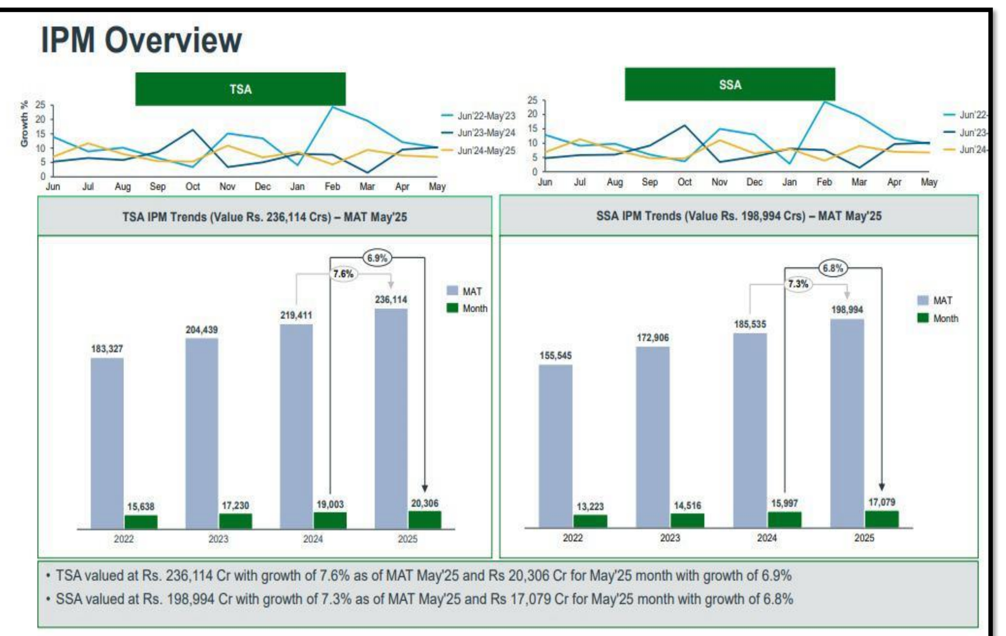


Figure 2

MAT RANK	COMPANY	TOTAL MAT MAY'24	TOTAL MAT MAY'25	TOTAL Val Gr%	TOTAL Un Gr%	ACUTE MAT MAY'24	ACUTE MAT MAY'25	ACUTE Val Gr%	ACUTE Un Gr%	CHRONIC MAT APR'24	CHRONIC MAT APR'25	CHRONIC Val Gr%	CHRONIC Un Gr%
	IPM	219411	236114	8%	-0.5%	134878	143606	6%	-1%	84533	92508	9%	1%
1	SUN*	17033	18811	10%	-0.2%	8149	8881	9%	-2%	8884	9931	12%	1%
2	ABBOTT*	13541	14823	9%	2%	7455	8354	12%	3%	6085	6468	6%	-2%
3	CIPLA	12046	12898	7%	0.2%	4637	4972	7%	-3%	7409	7926	7%	2%
4	MANKIND	10645	11366	7%	0.3%	6999	7308	4%	-1%	3645	4057	11%	4%
5	ALKEM*	8698	9213	6%	0.4%	7155	7594	6%	0.0%	1543	1620	5%	4%
6	INTAS*	7838	8666	11%	3%	2751	2953	7%	3%	5087	5713	12%	4%
7	TORRENT*	7487	8098	8%	-1%	3444	3635	6%	-3%	4043	4463	10%	0.5%
8	LUPIN	7536	8059	7%	-2%	2856	2949	3%	-6%	4681	5110	9%	2%
9	MACLEODS	7388	7725	5%	0.4%	4665	4821	3%	0%	2724	2904	7%	1%
10	DR.REDDYS*	6781	7374	9%	-1%	4881	5385	10%	-1%	1899	1989	5%	-4%

MANKIND SPECIALITIES

Mankind Specialities is a super-specialty division of Mankind Pharma, which started operations in Mumbai in the financial year 20-21 with the vision of serving the lives of millions of patients with innovative solutions, by offering quality and affordable products.

TEMPLAR

Templar, the **Cardiology** division of Mankind Pharma, was established in **2015** and focuses on managing diabetes, hypertension, and heart failure. Its flagship brand, **JUSTOZA (Dapagliflozin)**, is available in multiple combinations like **JUSTOZA M, S, SM, and GM**. The division also includes key brands such as **eplebless, Corabrad, Gudpres**, and the newly launched **Sitabless**, strengthening its presence in cardiometabolic care.

The Past
Ancient Templars were entrusted with safeguarding pilgrims who traveled to Jerusalem

The Present
We are the Templars (protectors) of the HEART

The Future
Templar is committed to protecting the heart from adversaries like Heart Failure, Hypertension & Diabetes

ORGANIZATIONAL STRUCTURE

- CHAIRMAN & WHOLE TIME DIRECTOR {Mr. Ramesh Juneja}
- VICE CHANCELLOR & MANAGING DIRECTOR {Mr. Rajeev Juneja}
- SENIOR PRESIDENT (SPECIALITIES) {Mr. Atish Majumdar}
- Product Management Team (TEMPLAR)
- Vertical Head {Mr. Pravin Dhore}
- Business Unit Head {Mr. Mangesh Dukhande}
- Head of Marketing {Mr. Linson John}
- Sr Product Manager {Mr. Mayur galgurgi}
- Sr Product executive {Ms. Samriddhi kadam}
- Sr Product executive {Mr. Naved sarwar}

Figure 3

Mankind's growth faster in the Cardiac, Anti-Diabetes & Gastro compared to the respective market growth

SUPERGROUP	IPM MONTH MAR'25 Val (crs)	IPM MONTH MAR'25 Val Gr%'25	IPM MONTH MAR'25 Unit Gr%'25	IPM MAT MAR'25 Val (crs)	IPM MAT MAR'25 Val Gr%'25	IPM MAT MAR'25 Unit Gr%'25	MANKIND MONTH MAR'25 Val (crs)	MANKIND MONTH MAR'25 Val Gr%'25	MANKIND MONTH MAR'25 Unit Gr%'25	MANKIND MAT MAR'25 Val (crs)	MANKIND MAT MAR'25 Val Gr%'25	MANKIND MAT MAR'25 Unit Gr%'25
TOTAL	19010	9%	2%	233261	8%	-0.2%	911	8%	3%	11233	8%	1%
CARDIAC	2548	13%	5%	30054	12%	2%	140	16%	7%	1638	17%	5%
ANTI-INFECTIVES	1997	5%	-0.3%	25295	5%	-2%	122	3%	-5%	1540	4%	-6%
GASTRO	2036	12%	10%	25096	10%	5%	88	8%	2%	1148	11%	3%
ANTI DIABETIC	1719	10%	2%	20711	8%	1%	77	12%	5%	923	12%	2%
PAIN	1448	7%	-2%	18541	8%	-2%	36	2%	-6%	486	8%	-1%
RESPIRATORY	1549	7%	2%	18417	3%	-3%	73	8%	3%	841	-0.4%	-3%
VMN	1445	8%	-0.1%	18259	8%	-3%	72	7%	3%	917	6%	-1%
DERMA	1284	8%	1%	16301	10%	2%	41	1%	-4%	588	5%	-2%
NEURO / CNS	1160	10%	1%	14084	9%	-0.2%	22	6%	1%	269	8%	1%
UROLOGY	441	17%	6%	5265	14%	4%	48	7%	3%	589	5%	3%

SWOT Analysis of Dapagliflozin

Internal

Strengths
- Effective in lowering blood glucose levels by 70 g/day
- Offers weight loss and blood pressure benefits.
- Mankind Consumeraopts a unique manufacturing process.

Weaknesses
- Cardiovascular risks risk-monitoring?
- Potential side effects management?
- Where do we fall behind on long-term effects?

External

Opportunities
- Expansion in diabetes market with growing population
- Combination therapies with other drugs?
- Adjacent cardiovascular tretm?
- New geos with less competition

Threats
- Entrenched competitors?
- Patent expirations that could impact us vulnera-
- Trends in new class
- Economic or **political** issues could impact Mankind?

TOWS Analysis of Dapagliflozin

SO
- Leverage demonstrated health benefits for wider patient adoption
- Pursue FDCs to enhance market penetration and patient convenience
- Explore expansion in emerging cardiovasula markets

WO
- Improved risk management narratives focusing on trial dat
- Stress convenient fixed-dose options in advertising
- Conduct studies around sustained safety outcomes

ST
- Highlight unique manufacturing process in differentiating on quality
- Focus on combination therapies to stand out in a crowded market

WT
- Communicate safety findings and long-term advantages aggressively
- Preempt loss of patent protection through lifecycle management
- Prepare responses to changes in class trends or regulations

MARKET ANALYSIS on "DAPAGLIFLOZIN"

Market Study on Dapagliflozin

Brands	Company	MAT April 24	MAT April 25	IS	Growth %	MS	UNIT April 25	Growth%
FORXIGA	ASTRA Z	71.56	81.31	9.75	13.63	12.75	2175.87	4.02
UDAPA	USV	69.88	75.56	5.69	8.14	11.84	7657.34	5.28
OXRA	Sun*	59.56	70.42	10.85	18.22	11.04	4766.15	7.60
DAPANORM	Intas	44.42	47.93	3.51	7.90	7.51	3690.06	-0.28
DAPAVEL	Alkem*	41.62	48.74	7.12	17.11	7.64	4503.25	8.31
DAPARYL	Intas *	27.84	30.47	2.63	9.45	4.78	2825.71	1.05
DAPAGLYN	Mac	27.16	23.89	-3.27	-12.04	3.74	1595.54	4.19
DAPAMAC	Zydus*	26.14	27.00	0.86	3.30	4.23	2393.02	2.98
GLUXIT	Eris *	24.00	21.14	-2.86	-11.91	3.31	2053.73	-16.25
GLUCRETA	Torrent*	18.59	18.61	0.02	0.12	2.92	1866.08	-8.54
JUSTOZA	Mankind	6.30	8.26	1.97	31.25	1.30	735.07	7.50
GRAND TOTAL		590.91	637.95	47.04	7.96	100.00	51749.41	2.20

1. TITLE:
"Current and Emerging Trends and Competitive Analysis of Dapagliflozin" with Focus on JUSTOZA (Mankind Pharma)

- **Internship Project at Mankind Pharma:**
  "13 May–13 July 2025"

2. METHODOLOGY:
- **Objective:**

To analyze the **current position and market performance of JUSTOZA (Dapagliflozin)** and identify **emerging trends and competitor dynamics** in the Indian anti-diabetic market using secondary data.

- **Data Source:**

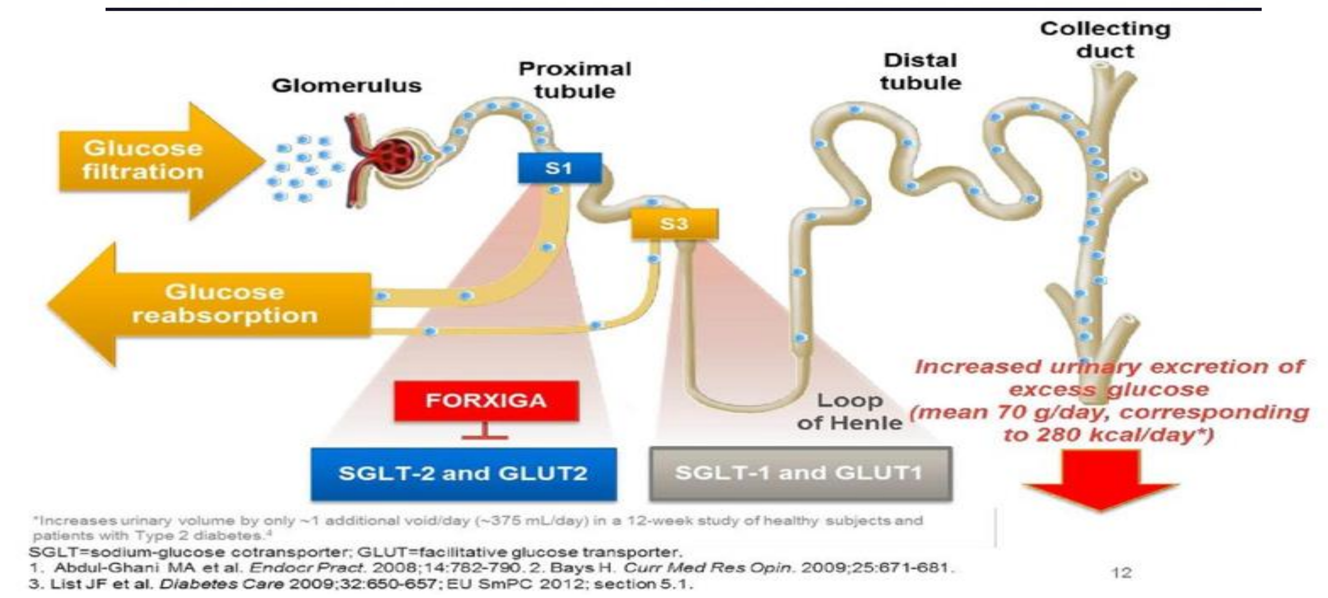
IQVIA MAT April 2024 vs. April 2025 Data
- Sales values (in ₹ Cr)
- Market share %
- Unit sales
- Growth trends (value & unit)

- Combination analysis of **Dapagliflozin with other anti-diabetic molecules** (e.g., Metformin, Linagliptin, Sitagliptin, etc.)

Theoretical Vs Practical Understanding

Theoretical Learnings
- Understood the pharmacology and MOA of Dapagliflozin (SGLT2 inhibiter).
- Studied different Dapagliflozin combinations and their indications
- Learned the competitive landscape of anti-diabetic drugs in India
- Gained knowledge of brand positioning and life cycle management
- Understood patient compliance, dosage, and pack-size strategies

Practical Learnings
- Analyzed market sales data (MAT) for Dapagliflozin brands.
- Observed how LBLs, visual aids, and promotional tools are designed.
- Worked on price comparison and brand pack-size mapping.
- Gained exposure to how marketing teams evaluate competitors
- Suggested improvement areas for better product positioning



- How it works?
- **Glucose is filtered by kidneys**
  In the kidney, blood passes through the glomerulus and glucose is filtered into the urine.
- **Normally, kidneys reabsorb glucose**
  The glucose in the urine is usually taken back (reabsorbed) into the blood by proteins called **SGLT-2** in the proximal tubule.
- **Dapagliflozin blocks SGLT-2**
  Dapagliflozin (like FORXIGA in the image) **blocks the SGLT-2 protein**, so less glucose gets reabsorbed.
- **More glucose is thrown out in urine**
  Because SGLT-2 is blocked, **extra glucose is passed out through urine**, which reduces blood sugar levels.
- **Helps in calorie loss and weight control**
  This process also removes about **70 grams of glucose per day**, which is like **losing 280 calories daily**, helping in **weight and sugar control** in diabetes patients.

Price & Pack Analysis

Parameter	JUSTOZA (Mankind)	Competitor Brands
5 mg Pack (MRP)	₹136.1 (15 tablets)	Ranges from ₹129.5 – ₹525
10 mg Pack (MRP)	₹179.7 (15 tablets)	Ranges from ₹151 – ₹554
Pack Size	Larger pack (15 tablets)	Most others offer 10 or 14 tablets
FORXIGA MRP	₹525 – ₹554 (very high)	Premium pricing by AstraZeneca

Summary:
- **JUSTOZA is more cost-effective per tablet** due to larger pack (15s) with reasonable MRP.
- **FORXIGA is the costliest**, making it less accessible to price-sensitive patients.
- **UDAPA, DAPAVEL, and DAPANORM** have smaller packs with slightly lower MRPs, but per-tablet cost is higher than JUSTOZA.

1. Minor Side Effects of Dapagliflozin
- Increased urination
- Urinary tract infections (UTIs)
- Genital infections (mostly mild & treatable)
- Slight drop in blood pressure (in few patients)

2. Tagline for Promotion
- *"JUSTOZA – Smart Control. Superior Value."*

Affordable, Effective & Trusted Diabetes Care from Mankind

Alternative:
- *"15 Days of Power, at a Smarter Price – Choose JUSTOZA" More tablets.*

More relief. More reason to prescribe.

Challenges Faced During Internship

- **Handling Large-Scale Market Data**
  Initially faced difficulty in managing and analyzing IQVIA data with multiple brands, combinations, and MAT trends across different timelines.
- **Understanding Complex Brand Strategies**
  It was challenging to interpret the rationale behind **pricing, pack size differences,** and **formulation positioning** in a highly competitive diabetic market.
- **Balancing Technical & Strategic Thinking**
  Needed to not just analyze numbers but translate data into meaningful insights, which required shifting from an academic to a market-oriented mindset.
- **Interpreting Physician & Market Feedback**
  Understanding how doctors respond to brands and how market factors influence sales required industry-level thinking and interaction with cross-functional teams.

Major Learnings During Internship

- **Deep Understanding of Anti-Diabetic Market**
  Gained complete knowledge of Dapagliflozin molecule, its MOA, variations, and market positioning strategies.
- **Real-Time Competitor Analysis**
  Learned to track **brand performance**, identify **growth drivers**, and observe **brand cannibalization** or declining trends in real-world settings
- **Excel Proficiency in Pharma Analytics**
  Developed working knowledge of **Pivot Tables, VLOOKUP, HLOOKUP, and trend charts** to draw actionable conclusions from complex datasets.
- **Strategic Thinking for Brand Building**
  Understood how companies plan **brand lifecycle, launch strategies, positioning, and pricing models** in highly saturated markets
- **Value of Packaging, Visual Aids & Communication**
  Learned how **LBLs, pack design, and promotional content** influence prescription behavior and brand recall among doctors
- **Data-Driven Decision Making**
  Learned to present findings through structured insights for **product team discussions**, helping in **strategy alignment** and **future planning**.
- **Professional Communication & Team Collaboration**
  Gained exposure to **inter-departmental interactions**, mentor reviews, and professional presentation of reports and posters

Suggestions

- Launch new combinations like Dapagliflozin with Linagliptin and Metformin to stay ahead in the market.
- Use more digital platforms like webinars and social media to promote the Justoza brand effectively.
- Improve the design and content of LBLs to make them more attractive and easier to understand for doctors.
- Introduce smaller and low-cost packs to target patients in tier 2 and tier 3 cities.
- Increase field force training to improve scientific communication with doctors.
- Conduct regular competitor analysis to update strategies based on market changes.