

ASTELLAS PHARMA INDIA PVT. LTD.

Astellas is dedicated to improving global health by delivering innovative and reliable pharmaceutical solutions that create real value for patients. Through our Focus Area Approach and Rx+® business, we aim to flexibly respond to advances in science and transform disease treatment, including pioneering cell and gene therapies. We foster a results-oriented, collaborative corporate culture that values intelligent risk-taking and leadership. Guided by our Corporate Strategic Plan 2021, we set ambitious goals across strategic, organizational, and performance areas to achieve sustainable growth. By actively engaging with patients, families, and all stakeholders, we continue to turn cutting-edge science into meaningful healthcare value.

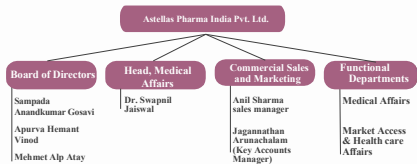
MISSION

Astellas Pharma India's mission is to contribute toward improving the health of people by providing innovative and reliable pharmaceutical products. We aim to go beyond expectations in life sciences, continuously deliver quality solutions, and earn the trust of patients and stakeholders.

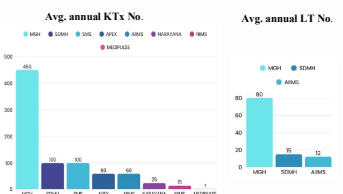
VISION

Astellas Pharma India's vision is to turn advances in science into value for patients, addressing unmet medical needs through innovative healthcare solutions. By staying at the forefront of healthcare change, we strive to improve the health of people in India and beyond.

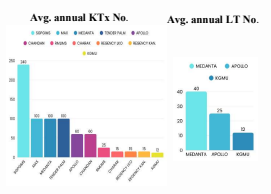
ORGANISATION STRUCTURE



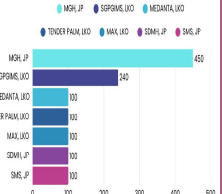
ORGAN TRANSPLANT LANDSCAPE OF RAJASTHAN



ORGAN TRANSPLANT LANDSCAPE OF UTTAR PRADESH



TOP-PERFORMING TRANSPLANT CENTERS (ANNUAL VOLUME)



STRENGTH

- Strong Clinical Profile:** Recognized for efficacy and fewer side effects, making it a top choice in critical cases.
- Established Brand:** Benefits from doctor familiarity and an established reputation in the market.
- Presence in Key Hospitals:** Prescribed in high-volume centers like SGPGIMS in Lucknow

WEAKNESS

- Challenged by the perception of being a high-cost option.
- Faces intense pressure from dominant generic brands in pharmacies.
- Lacks exclusive loyalty from doctors who have flexible brand preferences.
- Loses prescriptions due to insufficient sales rep coverage in certain hospitals.

SUGGESTIONS FOR IMPROVEMENT

- Enhance On-Ground Presence:
- Strengthen on-ground presence to build relationships with key prescribers.
- Prioritize High- Volume Accounts:
- Concentrate on the highest-volume accounts, starting with MGH and SGPGIMS.
- Develop Patient Support Program:
- Address the unmet need for medication procurement by developing patient support programs.

THREATS

- Competitors have deep doctor engagement and a strong market presence.
- High market price sensitivity favors lower-cost generic alternatives.
- Risk of losing prescriptions due to non-committal doctor preferences.
- Prescriptions may be substituted with generics at the pharmacy level due to cost.

OPPORTUNITY

- Capitalize on the rapidly expanding Indian organ transplant market.
- Fill service gaps by offering patient support for medication procurement.
- Use its strong clinical data to reinforce its value over cheaper alternatives.

Market Potential

>1500	>6500	Estimated Business:
New De-Novo Patients Annually	Maintenance Patient Base	Year 1: 15 Million Rupees
		Year 2: 42 Million Rupees

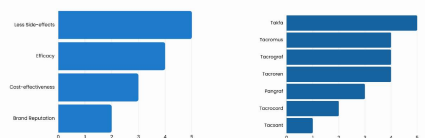
Educate on Value

- Launch CME programs to reinforce Prograf's superior clinical profile over cost-centric alternatives.

Stay Agile

- Continuously monitor the competitive landscape to adapt and refine the approach.

Key Doctor Insights: Tacrolimus Preferences & Ratings



Top Factors for Tacrolimus Choice

Preferred Tacrolimus Brands

PRACTICAL VS. THEORETICAL UNDERSTANDING

- Application of Theory**
 - Applied business theories of market sizing, competitive intelligence, and stakeholder mapping to assess the organ transplant market in target cities.
- Hands-On Experience**
 - Gained practical experience in primary research by conducting direct surveys with 75 healthcare professionals, including physicians, coordinators, and pharmacists.

KEY LEARNINGS

- **Universal Tacrolimus Use:** Foundational immunosuppressant prescribed by 100% of physicians post-transplant.
- **Clinical Outcomes Drive Choice:** Doctors prioritize "Less Side Effects" and "Efficacy" above all else.
- **Significant Market Opportunity:** High volume of transplants indicates a robust and growing market.
- **Pharmacy-Level Dynamics:** Generic brands dominate pharmacy sales, highlighting the influence of patient affordability.
- **Competitive Landscape:** Prograf is strong in efficacy but challenged on perceived "Cost-Effectiveness".

ACCESSING STAKEHOLDERS

Difficulty in gaining survey access to 75 busy healthcare professionals across four cities.

INCOMPLETE DATA

Navigating data gaps where key information was unavailable for certain hospitals.

CHALLENGES FACED

FRAGMENTED PREFERENCES:

Analyzing highly inconsistent brand loyalties that varied significantly between institutions.

FORECASTING UNCERTAINTY:

Evaluating the potential of new or developing centers that had little to no historical data

VALUE ADDITION

