MARKET DYNAMICS AND COMPETITIVE LANDSCAPE OF PANTOPRAZOLE FORMULATIONS IN INDIA

Presented by- Druni Bari Stream- School of Pharmaceutical Management Roll No.- 0624 University Mentor- Dr. Sudhinder Singh Chowhan Organization Mentor- Mr. Manas Rout

IMPEERICAL CONSULTING

Impeerical Consulting established in 2003 is a market research company with a significant presence in healthcare industry .we have completed 100+ projects for over 20+ clients in the past year providing market analysis and business strategy development for healthcare and pharmaceutical companies

MISSION

Our mission is to deliver high-quality, actionable insights and strategic guidance to life science companies, enabling them to make informed decision, optimize market strategies and enhance patient care. We are committed to excellences, integrity, and innovation in all our research endeavours. Ensuring that our client can navigate the complexities of the pharmaceutical landscape with confidence

VISSION

To be the leading provider of innovative and comprehensive market research , market intelligence and competitive intelligence solutions empowering life science companies such as pharmaceutical medical device, medical equipment, hospital etc.

ORGANIZATION STRUCTURE

MANAS RANJAN ROUT (Director- Project Management, Business Development and Operations)

ILA RAUT (Director- Human Resource Finance & Legal)
- Human Resource Manager (2)
- Finance & Accounting (3)
- Legal Adviser (2)

ABINASH SAHOO (Associate Vice President)
- Deputy Project Manages (3)
- Assistant Project Manages (5)
- Research Associate/ Bussines Associate (10)

NITISH KUMAR (Assistant Vice President)
- Senior Project Manages (2)
- Assistant Project Manages (4)
- Research Associate/ Bussines Associate (8)

PRACTICAL VS THEORTICAL UNDERSTANDING

Practical Exposure

- Real-time branding campaign implementation and impact measurement using a variety of data sources
- To verify industry trends, market research was carried out and industry experts were consulted.
- collected clinical feedback through surveys and face-to-face conversations with clinicians.

Theortical Understanding

- Utilizing data and graphics to gauge campaign outcomes and enhance tactics is known as applied marketing analytics.
- using primary and secondary research techniques to find and confirm market threats and opportunities.
- Knowing how healthcare professionals (HCPs) make decisions and establishing enduring connections using CRM and B2B marketing

STRENGTH

- Leading position in India's healthcare and life sciences industries for primary competitive and market intelligence
- A large and varied clientele of more than 150, including prestigious businesses.
- High accuracy of data in all research endeavors.
- Cooperative setting to effectively manage a variety of projects.

WEAKNESS

- Operational efficiency is impacted by a lack of employee experience.
- Issues with employee satisfaction and retention.
- Reduced visibility on LinkedIn and other social media
- Lack of market awareness
- An excessive dependence on central leadership

OPPORTUNITY

- Enter the MedTech category, which includes surgical instruments, equipment, and devices.
- Produce additional reports that concentrate on government categories, such as Ayushman Bharat, Railways, State Medical Corporations, CGHS, ESIC, and Defense.
- Should introduce Industry Dashboards and Tech Analytics

THREAT

- Large Market Research and Consulting MNCs entering the Market Research & Competitive Intelligence space pose an increasing threat to the market.
- possible difficulties in protecting the privacy of data.
- Due to a heavy reliance on primary methods, industry trends favoring diversified research methodologies pose a risk.

KEY LEARNINGS

MASTERY OF MARKET RESEARCH

- Used both primary and secondary research techniques in ongoing projects.
- Conducted enlightening interviews with medical professionals and patients.

DATA ANALYSIS & STRATEGIC ASSISTANCE

- Supported strategic decision-making with data analysis.
- Created strategic recommendations that can be implemented in the pharmaceutical and healthcare industries.

IMPROVED SOFT AND TECHNICAL SKILLS

- Enhanced proficiency with PowerPoint and Excel.
- Greatly improved communication, presentation, and market research abilities.

UNDERSTANDING THE HEALTHCARE SECTOR

- Carried out studies tailored to the pharmaceutical and healthcare services industries.
- Demonstrated knowledge of the practices and therapies used by doctors when prescribing.

RCPA EXPERTISE

- Competent in using RCPA to obtain competitive intelligence and prescription data.

COMPETITIVE ASSESSMENT OF PANTOCID AND PANTOCID DSR

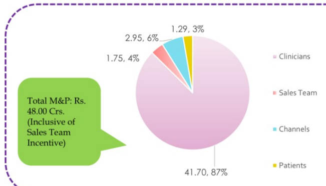
Sales Structure of Pharma Division

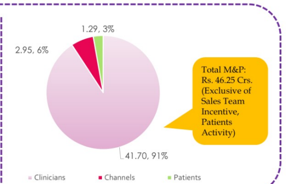
- The Sales force structure of Pharma division is placed below:
  - National Sales Manager: 1
  - Zonal Sales Managers : 5
  - Regional Sales Managers: 20
  - Area Sales Managers: 74
  - Sales Executives: 330

Region	Sales Executives	Pantocid DSR		Pantocid	
		Sales in Crs.	YPM (In Lakhs)	Sales in Crs.	YPM (In Lakhs)
North	91	87.00	7.97	95.00	8.70
South	78	78.00	8.33	85.00	9.08
West	74	63.00	7.09	70.00	7.88
East	87	60.00	5.75	66.00	6.32
Total	***330***	***288.00***	***7.27***	***316.00***	***7.98***

Marketing and Promotional Spent May MAT 2025

- Pharma Division invested Rs. 48.00 Crs. For Pantocid and Pantocid DSR marketing and promotional activities during June 2024 to May 2025. The M&P spent is 8% of the total sales.
  - The highest investment has made for the doctors which is 87% of the total M&P spent.
  - The second highest investment was made for Sales Team category which was contributing to 6.80 % of the total M&P Spent.
  - Division had made an investment of Rs 1.75 Crs for Sales Team.





COMPANY OVERVIEW

- **Key Brands & Sales**: Sun Pharma's targeted brands, Pantocid and Pantocid DSR, achieved sales of 316 Crs and 288 Crs, respectively.
- **Marketing & Promotion**: The Pharma Division managed an M&P spend of Rs. 48.00 Crs, accounting for 8% of total sales, indicative of their promotional investment.
- **Extensive Sales Force:** A robust sales team comprises 5 Zonal, 20 Regional, 74 Area Sales Managers, and 330 Sales Executives, ensuring wide reach.
- **Broad Doctor Coverage**: The company maintains significant doctor coverage across India, reaching 14,850 CP's, 11,220 GP's, 4,290 Gastroenterologists, and 3,300 Orthopedists.

M&P MAY MAT 2025

- **Doctors**: Receiving the dominant share at 79.28% of total M&P, this segment saw major investments in fostering professional relationships through collaborations with medical bodies (30.25%, Rs. 14.52 Crs) and comprehensive residential CME events (28.90%, Rs. 13.87 Crs).
- **Channel Partners**: Accounting for 6.14% of M&P, investment here was primarily weighted towards engaging distributors (5.34%, Rs. 2.56 Crs) through promotional inputs, schemes, and "Get Together" events to strengthen partnerships.
- **Patients**: A more modest 2.55% of total M&P was dedicated to direct patient engagement, including Patient Awareness Camps/GERD Camps (1.23%, Rs. 0.59 Crs) and Patient Education Streams (0.90%, Rs. 0.43 Crs).
- **Sales Team**: A significant 3.65% (Rs. 1.75 Crs) of the M&P budget was specifically allocated to the sales force, channeled into incentives, gifts, trips, and awards to motivate their performance.

SUGGESTIONS FOR IMPROVEMENT

Improved Cooperation & Communication

- Use a platform that facilitates collaboration for project management and reporting.
- Stress prompt action or task follow-up.

Improve Market Performance

- Establish attainable project deadlines to boost output and raise your company's profile in the marketplace.

Adopt a Hybrid Work Model

- Employers can increase employee satisfaction and productivity by implementing a flexible hybrid work model that gives workers autonomy and a work-life balance.

Boost Engagement & Retention

- Encourage a positive work atmosphere to increase engagement, morale, and eventually retention.

Boost Improvement Projects

- To enhance managerial abilities, offer leadership training.

CHALLENGES FACED

Obstacles in Primary Research

- Encountered challenges when attempting to extract data through primary research because of organization's poor online visibility

Work-Life Harmony

- Mastered the difficulty of juggling personal and professional obligations while allotting enough time for each task.

Training Sessions

- Training sessions of Excel, Dashboard, Competitive Intelligence were not conducted as promised.

VALUE ADDITION

- Market Research & Analysis
- Professional Growth
- Networking and Connection Building
- Client Interaction
- Skills Enhancement