MBA HEALTHCARE ANALYTICS DISSERTATION

AI-Driven Indian Pharmaceutical Market Analysis & Competitive Benchmarking Using IMS Data

Smit Rajendra Patil

Under the Supervision and Guidance of Dr. Kumar Parimal Shrestha

The IIHMR University, Jaipur

AGENDA

ROADMAP

INTRODUCTION

Background & Problem Statement

The Indian Pharmaceutical Market (IPM) is one of the most competitive and fastest-growing markets globally valued at over **INR 2,40,000 Crores** as of September 2025, with double-digit growth sustained over the last decade.

India contributes over 20% of global generic drug volume and 50%+ of vaccine demand — earning its title as the "pharmacy of the world." With 1,100+ active companies, the market is highly fragmented.

Problem:

Existing market analyses offer only a narrow or fleeting view. No integrated framework exists that combines company, brand, molecule, and therapy-level dynamics over a long time horizon using IMS MAT data.

2.43L Cr
IPM Value (MAT 2025)

1,154
Companies Tracked

1,11,285
Brand-level Records

2021–25
Study Period (5 MAT cycles)

Research Objectives

9 Core Objectives of the Study

01
Market Share & Growth
Examine market share/growth of leading pharma companies (IMS MAT SEP 2021–2025)

02
Market Share Gainers/Losers
Identify which companies gained or lost market share over the study period

03
Growth Consistency
Evaluate consistency of growth using a structured scoring approach

04
ALKEM Benchmarking
Benchmark ALKEM Laboratories against peer companies competitively

05
Price vs Volume
Determine if growth is driven by price increase or volume expansion

06
Acute vs Chronic Shift
Review change in market composition shift from acute to chronic therapy

07
Portfolio Diversity
Assess diversity of company portfolios across therapy groups

08
Competitive Intensity
Identify low-competition & high-growth therapy areas as opportunity zones

09
Emerging Molecules/Brands
Identify new molecules and brands with the highest growth potential

METHODOLOGY

Research Methodology

Quantitative, descriptive-analytical design using secondary IMS MAT data, processed through a structured Python pipeline.

Data Collection → Data Cleaning → KPI Computation → Multi-level Analysis → Visualization

Key Performance Indicators

KPI	Description
YoY Growth	(MAT Current − MAT Previous) / MAT Previous × 100
CAGR (3-yr)	[(MAT 2025 / MAT 2022)^(1/3) − 1] × 100
Consistency Score	0–4 score based on yearly positive growth
Diversity Score	0–100, MinMaxScaler across 4 portfolio dimensions

Dataset: 1,11,285 brand-level records · 1,154 companies · Sep 2021–Sep 2025 (5 MAT periods)

Tools & Software

- Python 3.11 (Anaconda)
- pandas 2.x & numpy
- matplotlib & seaborn
- scikit-learn (MinMaxScaler)
- Jupyter Notebook

Key Findings — Market Overview

IPM Growth, Market Share & Competitive Dynamics

INR 2,42,752 Cr	~11–12%	73% vs 27%	1,154
IPM Total Value (MAT 2025)	IPM Overall 4-Year CAGR	Indian vs MNC Value Share	Companies Analyzed

🏆 Market Share Leaders

Sun Pharma (#1), Abbott (#2), Cipla (#3), Mankind (#4), ALKEM (#5)
Top 10 companies hold ~40% of total IPM value.

📊 Market Share Shifts

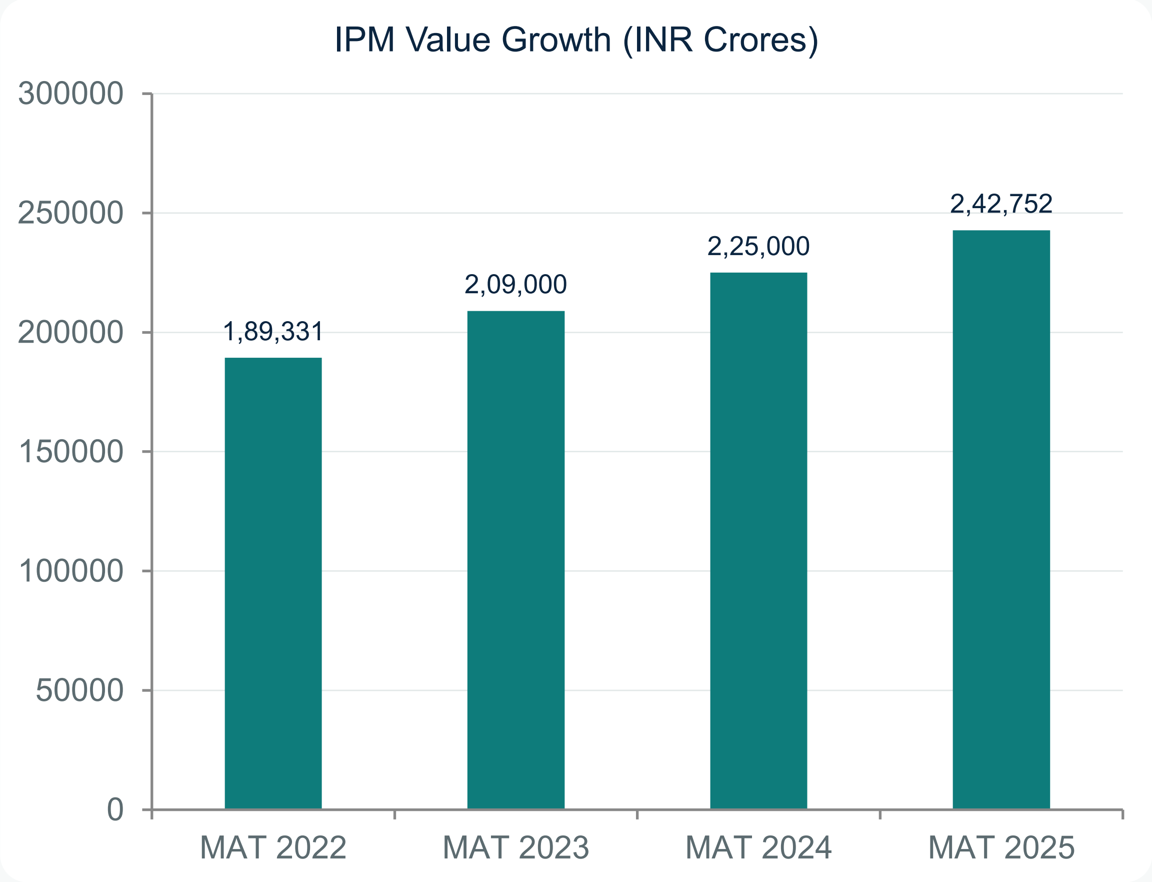
55–60% of companies increased market share.
Winners: MacLeod, Glenmark, IPCA Labs (chronic-focused mid-size).
ALKEM: Declined slightly from ~4.1% to ~3.9% market share.

💊 Chronic vs Acute

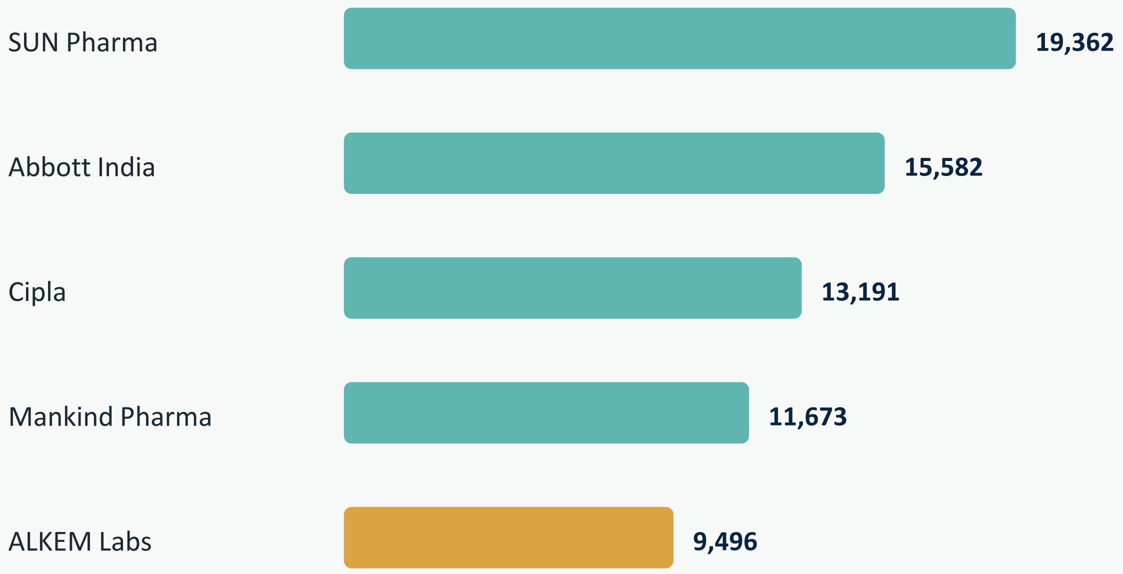
Chronic therapy grew from ~42% (MAT 2022) to ~46% (MAT 2025).
Chronic growth rate: 32–35% vs Acute: 22–25%.
Chronic may equal/exceed acute in 3–5 years.

FINDINGS

Market Growth & Leadership



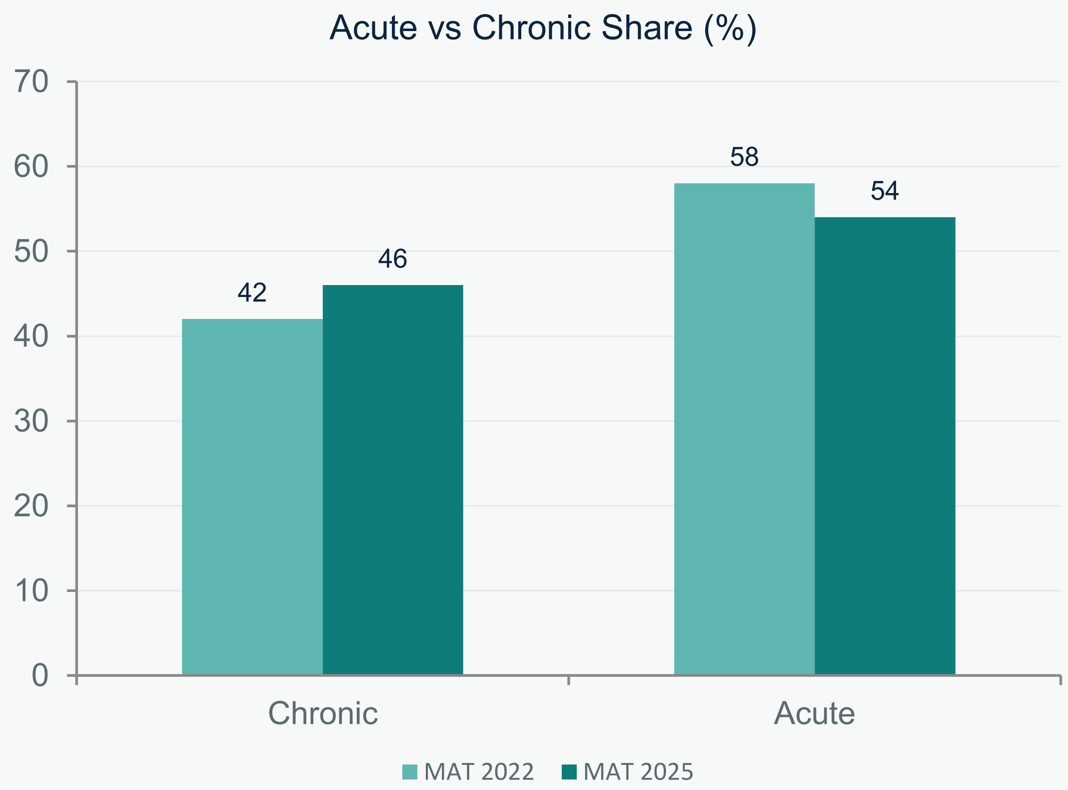
Top 5 Companies — MAT 2025 Sales (INR Cr)



+28.2% overall IPM growth (2022–2025); top 10 companies now hold ~55% of total market value, up from ~52%.

FINDINGS

Structural Market Shifts



Chronic therapy share rose from **42% → 46%** (2022–2025), growing 32–35% vs. 22–25% for acute — driven by lifestyle diseases & ageing demographics.

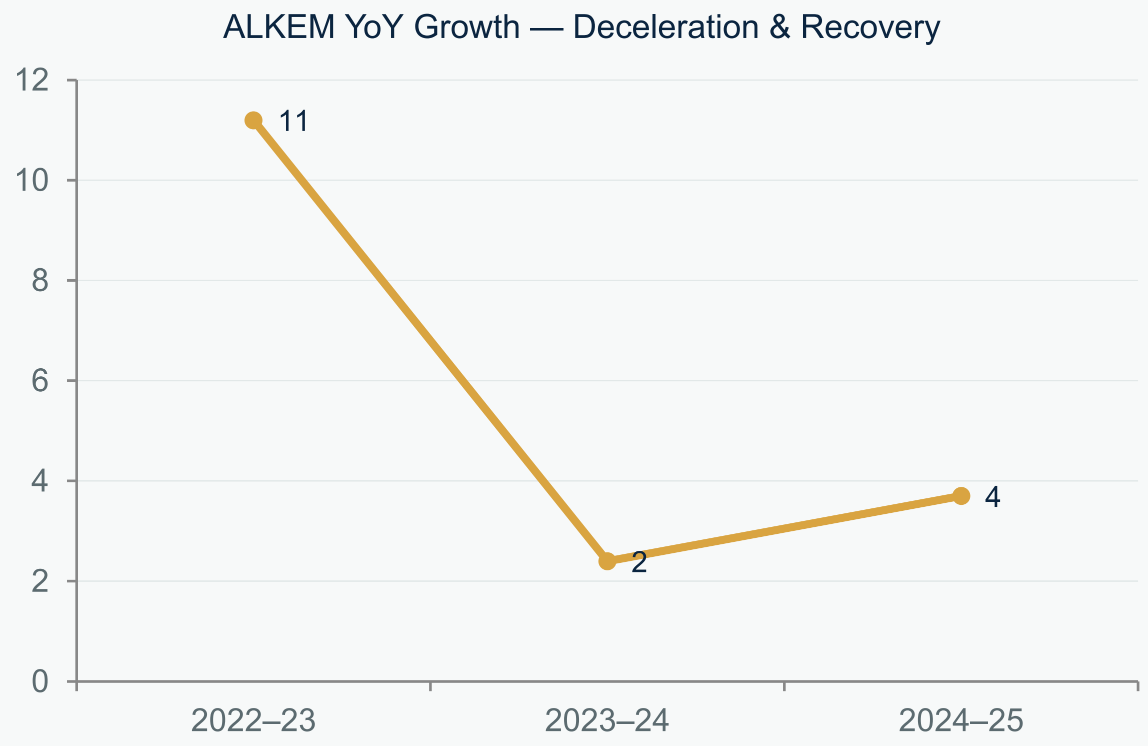
Price vs Volume Growth Driver

60–65% of companies are Price-Led — growth driven primarily by pricing, especially among top 10 players.

73% Indian companies' market share vs. **27%** for MNCs (higher revenue/brand)

BENCHMARKING

ALKEM Laboratories — Competitive Snapshot



5th Rank by MAT 2025 Sales

₹9,496 Cr MAT 2025 Sales

18.1% Overall Growth (vs. 24–26% peer avg)

4 / 4 Growth Consistency Score (highest)

Key Findings — ALKEM & Analytical Insights

Benchmarking, Price-Volume, Portfolio & Molecules

ALKEM Laboratories — Competitive Benchmarking

- Rank: 5th by MAT 2025 sales (~INR 9,496 Crores)
- 4-Year Overall Growth: 18.1%
- Peer Average Growth: 24 – 26% (underperforming)
- Consistency Score: 4/4 (positive growth every year)
- Significant decline in 2023–24 YoY growth

Strengths:
✓ Strong in acute therapy segments
✓ Consistent positive growth trajectory
✓ Wide brand portfolio

Opportunities:
→ Increase chronic therapy exposure
→ Accelerate volume-led growth in generic segments
→ Invest in emerging high-growth molecules

💵 Price vs Volume Growth

60–65% of pharma companies are Price-Led.
IPM value growth primarily driven by price increments.
DPCO regulations constrain certain segments.

🧬 Portfolio Diversity

90%+ Diversity Score → Consistency Score of 4.
Portfolio diversity strongly correlates with sustained growth.
Highly diversified companies are consistent growers.

🌟 Emerging Molecules

Star molecules = 5–8% of total; highest opportunity.
Cardiovascular, anti-diabetics & CNS show highest potential.
Low-competition + high-growth therapy areas = strategic entry points.

CONCLUSION

Conclusion & Strategic Implications

Chronic Focus is Non-Negotiable

Build chronic therapy mix to 55%+ by 2027 to capture structural demand shift.

Consistency is a Strategic Asset

Diversified portfolios (Score ≥70) show 90%+ chance of consistent growth.

White-Space Opportunities Exist

Low-intensity, high-growth therapy areas (e.g. specialty chronic) offer entry advantage.

Molecule Pipeline Priority

GLP-1 agonists & SGLT-2 inhibitors lead the Star molecule opportunity set.

Final Conclusion

The Indian Pharmaceutical Market now worth over INR 2,42,752 Crore rewards companies with chronic therapy strength, diversified portfolios, growth consistency, and data-driven decision-making. AI and Python-based analytics can now deliver multi-dimensional competitive intelligence once reserved for costly consulting engagements.

Thank You