

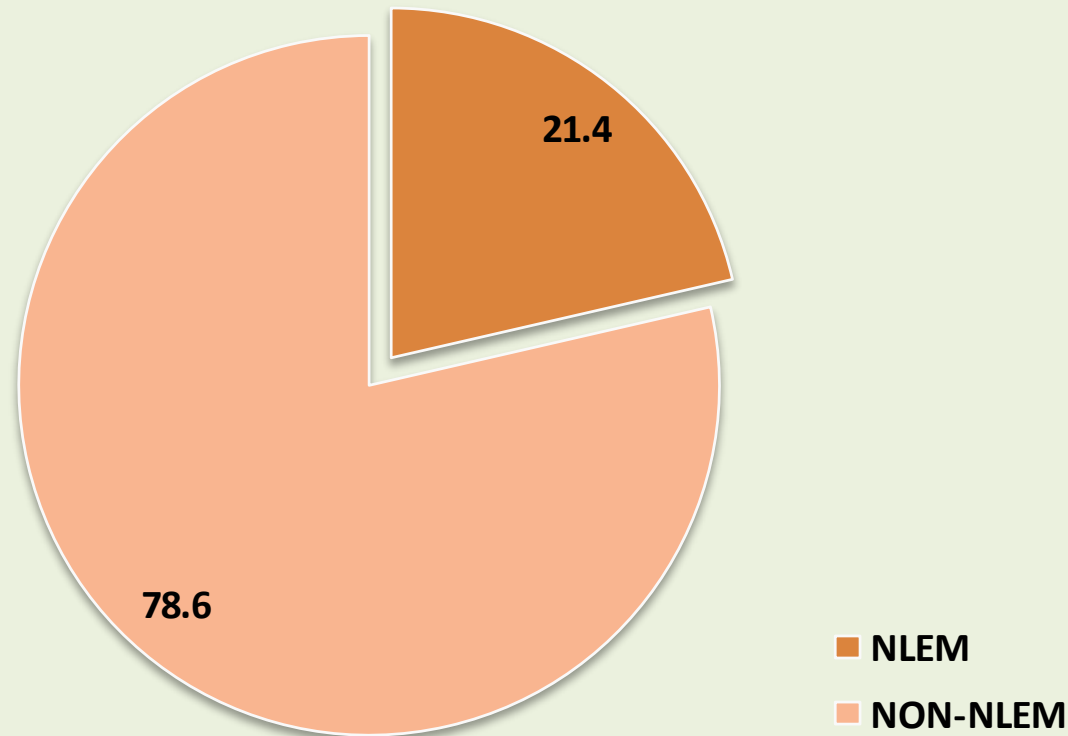
# **Impact of DPCO 2013 on Rx**

- 1. NLEM vs Non NLEM Brands**
- 2. NLEM Rx% Response Trend**
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- 4. Rx Response (%) Share Trend**

## Impact of DPCO 2013 on Rx : NLEM vs Non NLEM brands

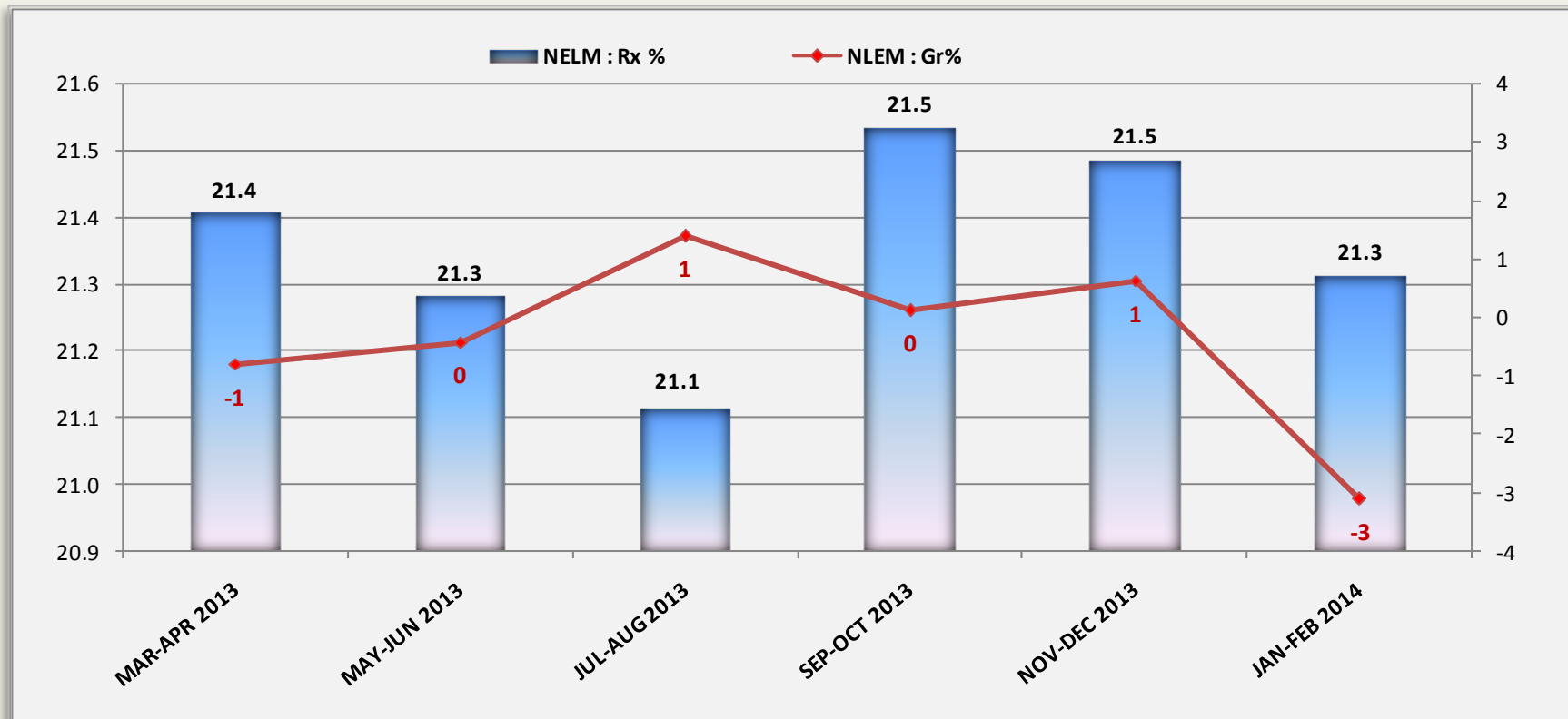
DPCO 2013 products Total Contribution to IPM : 21.4 % Rx out of total 42,21,138 drugs Rxed during Nov'13-Feb'14 period

IPM : NLEM vs. Non-NLEM : SPR : Rx% Response



# NLEM : Rx% Response Trend

- Post DPCO 2013 there has been a sharp drop in total NLEM impacted brands Rx trend
- Share of NLEM brands grew during Sept'13 to Feb'14 (seasonal growth), however, absolute Rx declined sharply during the same period



# Impact of DPCO 2013: Indian Vs MNCs

Impact of DPCO 2013 is more on MNCs compared to Indians – 32% of MNC Rx comes from NLEM brands (decline -2%) as against 20% of Indian co.s Rx from NLEM brands (decline -1%)

## MNC & INDIAN Corporate : NLEM vs. Non-NLEM : SPR : Rx% Response

| Corporate | IPM - ALL |                        |                             | NLEM    |                        |                             | NON-NLEM |                        |                             |
|-----------|-----------|------------------------|-----------------------------|---------|------------------------|-----------------------------|----------|------------------------|-----------------------------|
|           | Present   | %Grth over NLEM Period | %Grth over Pre- NLEM Period | Present | %Grth over NLEM Period | %Grth over Pre- NLEM Period | Present  | %Grth over NLEM Period | %Grth over Pre- NLEM Period |
| ALL       | 100.0     | -1                     | -1                          | 100.0   | -1                     | -2                          | 100.0    | -1                     | -1                          |
|           | =100      |                        |                             | 21      |                        |                             | 79       |                        |                             |
| MNC       | 12.5      | -2                     | -3                          | 18.6    | -2                     | -1                          | 10.8     | -2                     | -4                          |
|           | =100      |                        |                             | 32      |                        |                             | 68       |                        |                             |
| INDIAN    | 87.5      | -1                     | -1                          | 81.4    | -1                     | -2                          | 89.2     | -1                     | -1                          |
|           | =100      |                        |                             | 20      |                        |                             | 80       |                        |                             |

\* Present : Nov'13-Feb'14, NLEM Period : Jul-Oct'13 and Pre-NLEM Period : Nov'12-Feb'13

## Corporate Standing : NLEM vs. Non-NLEM : Rx % Response

Impact of DPCO 2013 has been maximum on GSK portfolio, 46% of GSK Rx is contributed by its NLEM brands that declined by -2%. Similarly for Sanofi NLEM brands contribution is 11%, which declined by -3

| Corporate                 | IPM - ALL |                              |                                   | NLEM    |             |                              |                                   | NON-NLEM |             |                              |                                   |
|---------------------------|-----------|------------------------------|-----------------------------------|---------|-------------|------------------------------|-----------------------------------|----------|-------------|------------------------------|-----------------------------------|
|                           | Present   | %Grth over<br>NLEM<br>Period | %Grth over<br>Pre- NLEM<br>Period | Present | % to<br>all | %Grth over<br>NLEM<br>Period | %Grth over<br>Pre- NLEM<br>Period | Present  | % to<br>all | %Grth over<br>NLEM<br>Period | %Grth over<br>Pre- NLEM<br>Period |
| ALL                       | 100.0     | -1                           | -1                                | 100.0   | 21          | -1                           | -2                                | 100.0    | 79          | -1                           | -1                                |
| MANKIND PHARMACEUTICALS   | 4.5       | 0                            | 2                                 | 3.8     | 18          | 2                            | 3                                 | 4.7      | 82          | 0                            | 2                                 |
| ABBOTT                    | 3.6       | -2                           | -2                                | 4.5     | 27          | 0                            | 0                                 | 3.3      | 73          | -3                           | -3                                |
| CIPLA                     | 3.5       | 6                            | 5                                 | 4.7     | 29          | 8                            | 4                                 | 3.1      | 71          | 5                            | 5                                 |
| GLAXO SMITHKLINE          | 3.1       | -4                           | -5                                | 6.6     | 46          | -2                           | -1                                | 2.1      | 54          | -6                           | -8                                |
| ALKEM LABORATORIES        | 3.0       | 2                            | 8                                 | 4.8     | 35          | 5                            | 11                                | 2.5      | 65          | 0                            | 6                                 |
| ZYDUS                     | 2.4       | 5                            | -1                                | 2.6     | 23          | -2                           | -7                                | 2.3      | 77          | 7                            | 1                                 |
| SUN PHARMA                | 2.3       | 5                            | 7                                 | 1.6     | 15          | 2                            | 1                                 | 2.5      | 85          | 6                            | 8                                 |
| MACLEODS PHARMACEUTICALS  | 2.1       | 3                            | 4                                 | 2.8     | 29          | 10                           | 6                                 | 1.9      | 71          | 1                            | 3                                 |
| ARISTO PHARMA             | 2.0       | -2                           | 4                                 | 1.6     | 18          | -2                           | 3                                 | 2.1      | 82          | -2                           | 4                                 |
| RANBAXY LABORATORIES      | 1.9       | -1                           | -2                                | 2.3     | 25          | 0                            | -6                                | 1.8      | 75          | -2                           | 0                                 |
| DR.REDDY'S LAB            | 1.8       | 4                            | 1                                 | 1.6     | 19          | 4                            | 0                                 | 1.9      | 81          | 4                            | 1                                 |
| LUPIN LABS                | 1.8       | -1                           | -1                                | 1.3     | 15          | -7                           | -1                                | 2.0      | 85          | 0                            | -1                                |
| PFIZER WYETH INDIA        | 1.5       | 0                            | -5                                | 2.9     | 41          | 3                            | -1                                | 1.1      | 59          | -2                           | -8                                |
| Ipca LABORATORIES         | 1.5       | 1                            | 6                                 | 2.4     | 34          | -7                           | 2                                 | 1.3      | 66          | 5                            | 8                                 |
| MICRO LABORATORIES        | 1.5       | 2                            | -2                                | 1.9     | 27          | -5                           | 3                                 | 1.4      | 73          | 5                            | -3                                |
| FDC LIMITED               | 1.4       | -1                           | -1                                | 2.0     | 32          | 2                            | 0                                 | 1.2      | 68          | -2                           | -1                                |
| GLENMARK PHARMACEUTICALS  | 1.3       | 9                            | 7                                 | 0.4     | 7           | 4                            | 9                                 | 1.6      | 93          | 10                           | 7                                 |
| ALEMBIC LIMITED           | 1.3       | 8                            | 2                                 | 2.0     | 32          | 15                           | 4                                 | 1.1      | 68          | 5                            | 1                                 |
| TORRENT PHARMACEUTICALS   | 1.3       | -3                           | -7                                | 2.0     | 33          | -3                           | -7                                | 1.1      | 67          | -3                           | -7                                |
| INTAS PHARMA              | 1.3       | -3                           | -7                                | 1.3     | 22          | -3                           | -7                                | 1.2      | 78          | -3                           | -7                                |
| SANOFI AVENTIS            | 1.2       | -1                           | -3                                | 0.6     | 11          | -3                           | 0                                 | 1.3      | 89          | 0                            | -3                                |
| J. B. CHEMICALS & PHARMA. | 1.1       | -6                           | 0                                 | 1.9     | 36          | -5                           | 5                                 | 0.9      | 64          | -7                           | -3                                |
| USV LIMITED               | 1.1       | -5                           | -5                                | 1.8     | 34          | -4                           | -10                               | 0.9      | 66          | -6                           | -2                                |
| INDOCO REMEDIES           | 0.9       | 1                            | -1                                | 0.6     | 15          | 6                            | -1                                | 1.0      | 85          | 1                            | -1                                |
| CADILA PHARMA             | 0.9       | -5                           | -5                                | 0.5     | 12          | -10                          | -10                               | 1.1      | 88          | -4                           | -4                                |

\* Present : Nov'13-Feb'14, NLEM Period : Jul-Oct'13 and Pre-NLEM Period : Nov'12-Feb'13

## Rx Response (%) Share Trend : Amoxicillin + Clavulanic Oral Solids

- GSK : despite having maximum DPCO 2013 impact on its portfolio, Augmentin Rx consolidation (28% & 24%) was significantly faster than Moxikind-CV and Clavum
- Impact of DPCO 2013 on strong brands ( having high equity ) like Augmentin and Clavum was positive compared to other low priced / relatively weak competitors – similar phenomenon observed across other therapy categories (as shown in the subsequent slides)

|                               | NOV'12-<br>FEB 2013 | MAR - JUN<br>2013   | JUL-OCT<br>2013     | NOV'13-FEB<br>2014  | (%) +/- in<br>MAR'13-FEB'14<br>over | (%) +/- in NOV'13-<br>FEB'14 over |                         |
|-------------------------------|---------------------|---------------------|---------------------|---------------------|-------------------------------------|-----------------------------------|-------------------------|
| AMOXYCILLIN + CLAVULANIC (S)  | Rx 42709 =<br>100.0 | Rx 40160 =<br>100.0 | Rx 41582 =<br>100.0 | Rx 47379 =<br>100.0 | MAR'12-FEB'13<br><b>12</b>          | J-O' 13<br><b>14</b>              | N'12-F' 13<br><b>11</b> |
| MOXIKIND-CV TAB[MANKIND PH]   | 17.5                | 17.1                | 15.6                | 16.7                | <b>4</b>                            | <b>22</b>                         | <b>6</b>                |
| CLAVAM TAB[ALKEM-ACE]         | 10.5                | 9.9                 | 11.1                | 11.2                | <b>28</b>                           | <b>15</b>                         | <b>19</b>               |
| AUGMENTIN-DUO TAB[GSK - PACC] | 8.8                 | 8.9                 | 9.3                 | 10.1                | <b>22</b>                           | <b>24</b>                         | <b>28</b>               |

**Note:**

- Amoxy + Clav Oral Solid Rx (%) Share in total market : Nov'13-Feb'14 : 1.12%
- Present : Nov'13-Feb'14, NLEM Period : Jul-Oct'13 and Pre-NLEM Period : Nov'12-Feb'13

## Rx Response (%) Share Trend : Cefixime Oral Solids

- In a relatively mass and mature life cycle category of Cefixime, the stronger brand equity brands like Taxim-O & Zifii are consolidating faster than the low priced Mahacef. Yet another example of strength of brand equity that's being leveraged post DPCO 2013 by the stronger brands. Incidentally, even after DPCO 2013 Taxim-O is still the most premium priced brand in the category

|                                | NOV'12-FEB 2013  | MAR - JUN 2013   | JUL-OCT 2013     | NOV'13-FEB 2014  | (%) +/- in MAR'13-FEB'14 over | (%) +/- in NOV'13-FEB'14 over |            |
|--------------------------------|------------------|------------------|------------------|------------------|-------------------------------|-------------------------------|------------|
|                                | Rx 48019 = 100.0 | Rx 45182 = 100.0 | Rx 48832 = 100.0 | Rx 48370 = 100.0 | MAR'12-FEB'13                 | J-O' 13                       | N'12-F' 13 |
| <b>CEFIXIME (S)</b>            |                  |                  |                  |                  | -1                            | -1                            | <b>1</b>   |
| ZIFI TAB[FDC-SPECTRA]          | 13.7             | 13.5             | 14.2             | 15.2             | <b>3</b>                      | <b>6</b>                      | <b>11</b>  |
| TAXIM-O TAB[ALKEM-ALPHA]       | 10.6             | 10.3             | 10.8             | 13.1             | <b>10</b>                     | <b>20</b>                     | <b>24</b>  |
| MAHACEF TAB[MANKIND DISCOVERY] | 7.8              | 8.2              | 8.3              | 7.5              | 0                             | -11                           | -3         |

**Note:**

- Cefixime Oral Solid Rx (%) Share in total market : Nov'13-Feb'14 : 1.15%
- Present : Nov'13-Feb'14, NLEM Period : Jul-Oct'13 and Pre-NLEM Period : Nov'12-Feb'13

## Rx Response (%) Share Trend : Atorvastatin

- Even in chronic therapy like Atorvastatin, the leader brand in Rx Aztor, reflects significant growth and achieved leadership position in the market. Atorva, Tonact also reflect consolidation. Other relatively small and low priced brands are not able to consolidate. As a result despite high growth of top brands the market is not able to reflect more than 3% or 4% growth. It may also be noted that Aztor is a relatively high priced brand compared to the other two competitors.

|                          | NOV'12-<br>FEB 2013 | MAR - JUN<br>2013  | JUL-OCT<br>2013    | NOV'13-FEB<br>2014 | (%) +/- in<br>MAR'13-FEB'14<br>over | (%) +/- in NOV'13-<br>FEB'14 over |            |
|--------------------------|---------------------|--------------------|--------------------|--------------------|-------------------------------------|-----------------------------------|------------|
| ATORVASTATIN             | Rx 9014 =<br>100.0  | Rx 9360 =<br>100.0 | Rx 8951 =<br>100.0 | Rx 9267 =<br>100.0 | MAR'12-FEB'13                       | J-O' 13                           | N'12-F' 13 |
| AZTOR TAB[SUN-AVIOR]     | 8.6                 | 9.1                | 8.6                | 11.1               | 14                                  | 33                                | 33         |
| ATORVA TAB[ZYD-MEDICA]   | 10.3                | 10.0               | 10.2               | 10.6               | 5                                   | 7                                 | 5          |
| TONACT TAB[LUPIN-PINACL] | 9.4                 | 9.9                | 11.0               | 10.5               | -1                                  | -1                                | 14         |

**Note:**

- Atorvastatin Rx (%) Share in total market : Nov'13-Feb'14 : 0.22%
- Present : Nov'13-Feb'14, NLEM Period : Jul-Oct'13 and Pre-NLEM Period : Nov'12-Feb'13



## Rx Response (%) Share Trend : Omeprazole

- Omez the leader brand in Omeprazole (a declining life cycle market) reflecting high growth post DPCO 2013. Increased promotional focus to overcome post DPCO loss in top-line and the brand equity that was existing with Omez, has helped the brand to out perform the market trends.

|                          | NOV'12-<br>FEB 2013 | MAR - JUN<br>2013   | JUL-OCT<br>2013     | NOV'13-FEB<br>2014  | (%) +/- in<br>MAR'13-FEB'14<br>over | (%) +/- in NOV'13-<br>FEB'14 over |                   |
|--------------------------|---------------------|---------------------|---------------------|---------------------|-------------------------------------|-----------------------------------|-------------------|
| OMEPRAZOLE (PPI)         | Rx 17560 =<br>100.0 | Rx 16617 =<br>100.0 | Rx 16741 =<br>100.0 | Rx 15869 =<br>100.0 | MAR'12-FEB'13<br>-12                | J-O' 13<br>-5                     | N'12-F' 13<br>-10 |
| OMEZ CAPS[DRL - AQUUSG]  | 33.3                | 36.1                | 36.4                | 40.8                | -4                                  | 6                                 | 11                |
| OCID CAPS[ZYD-CADILA]    | 11.8                | 14.2                | 13.3                | 11.1                | -5                                  | -20                               | -15               |
| OCID QRS TAB[ZYD-CADILA] | 4.6                 | 4.8                 | 5.8                 | 5.0                 | -9                                  | -18                               | -2                |

**Note:**

- Omeprazole Rx (%) Share in total market : Nov'13-Feb'14 : 0.38%
- Present : Nov'13-Feb'14, NLEM Period : Jul-Oct'13 and Pre-NLEM Period : Nov'12-Feb'13