



# Pharma Industry: The Outlook

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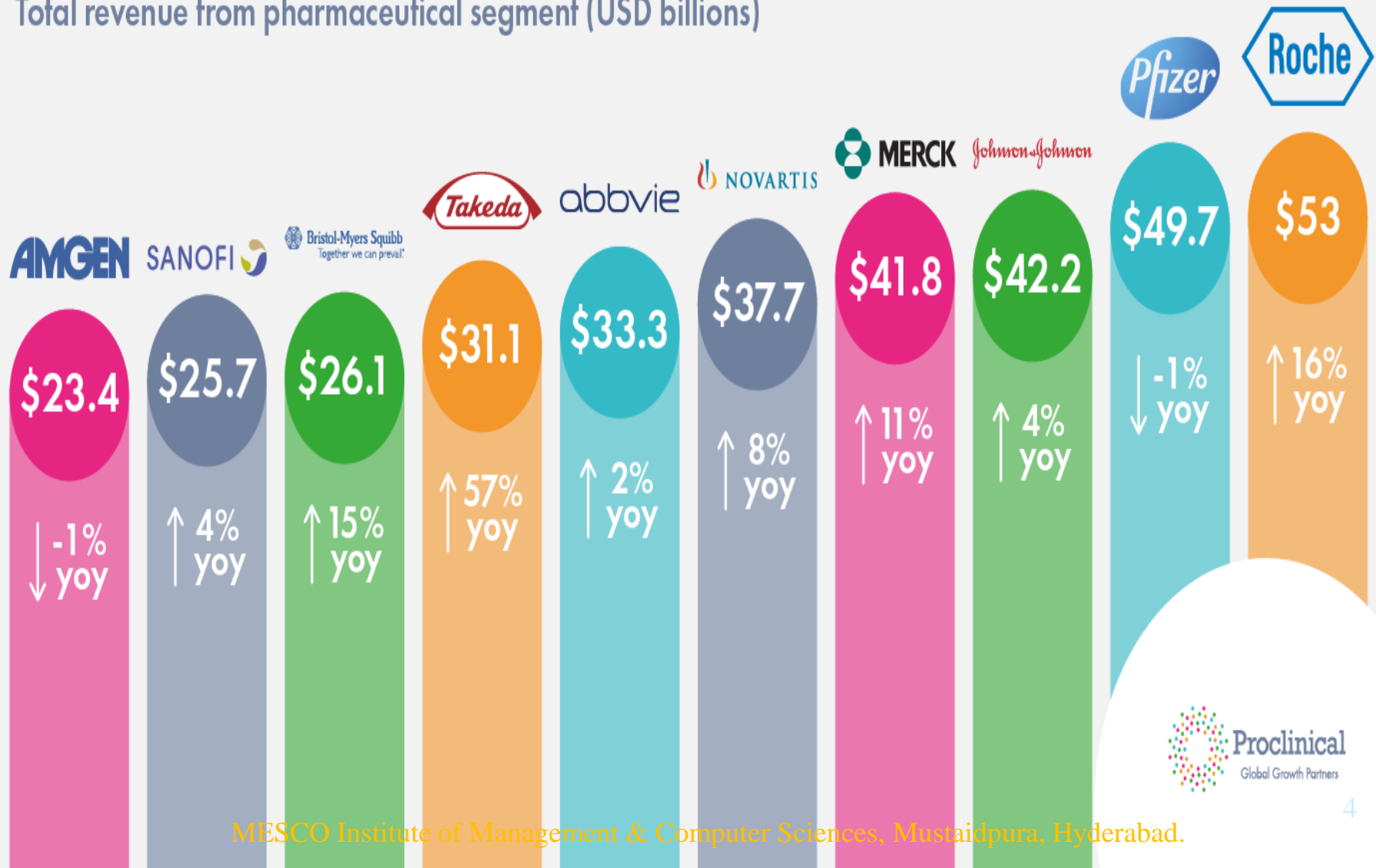
The background is a dark blue gradient. It features faint, stylized line charts in light blue and green, with some data points labeled with numbers like 19.307, 4.956, 25.0, 4.852, and 1.351. There are also faint icons of a pill and a capsule. The main title is centered in large, bold, white capital letters.

# PHARMA INDUSTRY OUTLOOK



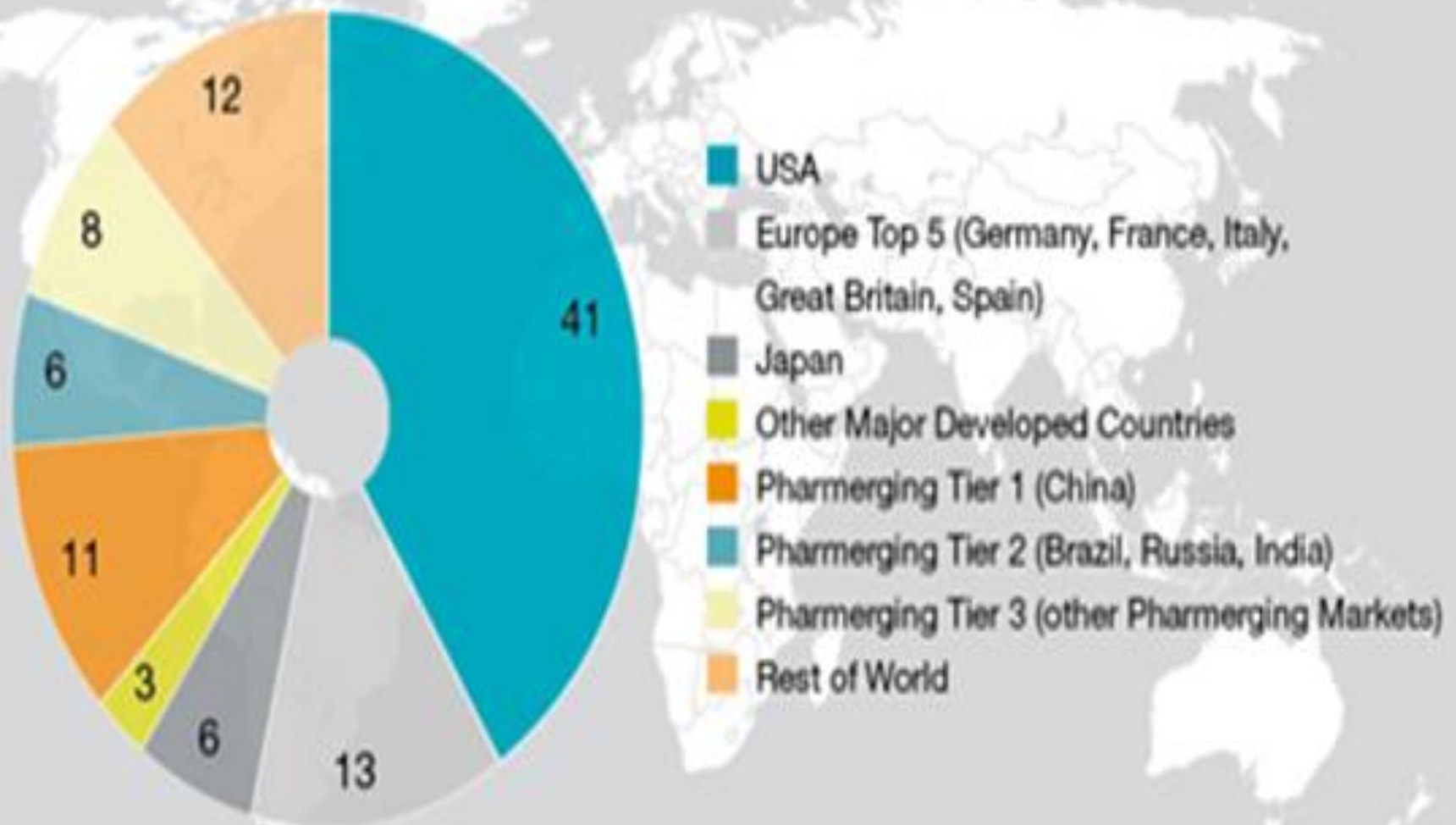
# Top 10 pharma companies 2020

Total revenue from pharmaceutical segment (USD billions)



# Manufacturing Chemist

## Pharma market 2020: Upswing turn for global production



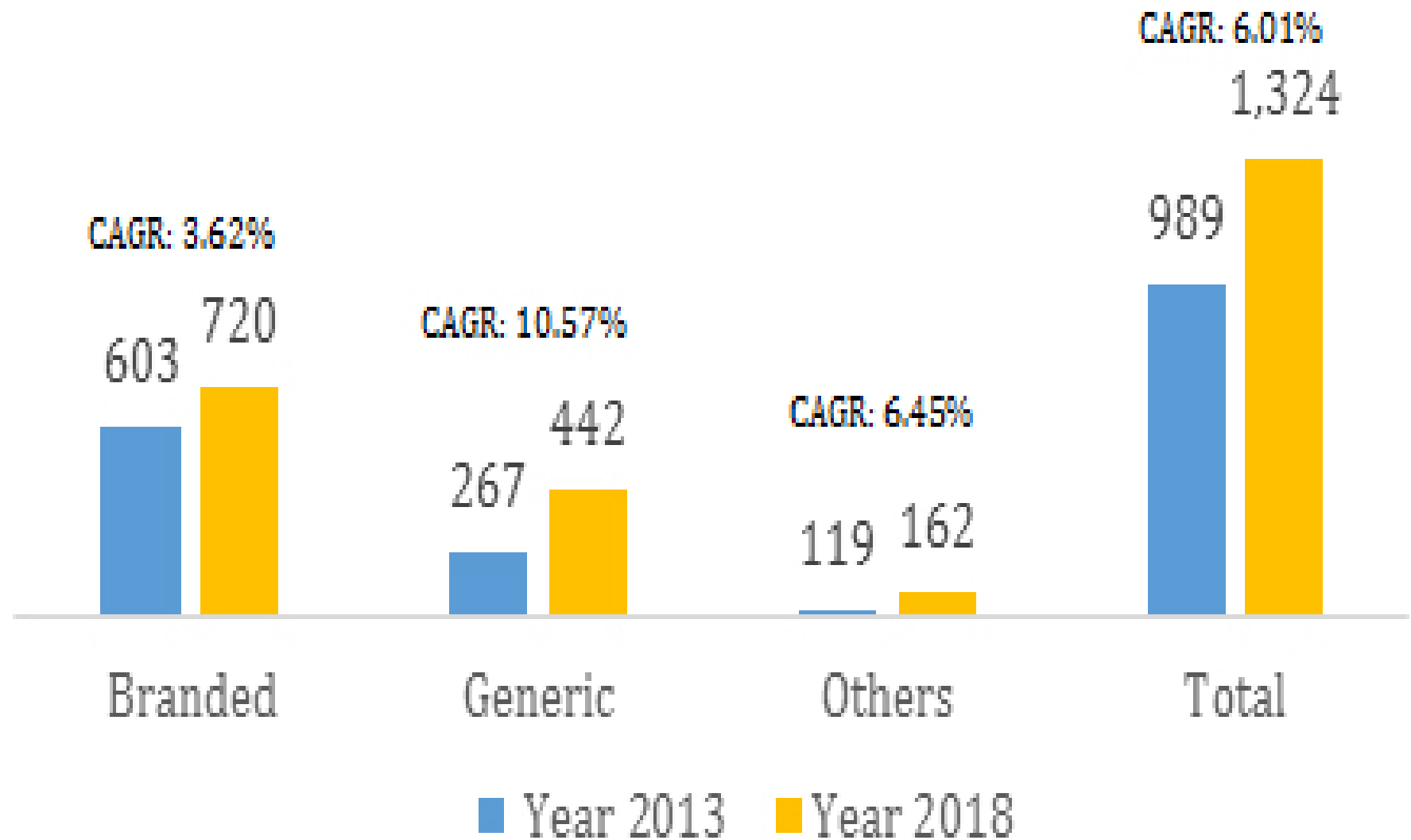
In percent



## Pharmaceutical Contract Manufacturing (CMO) Market-Growth Rate by Region (2020 - 2025)



## Figure 1: Global Pharmaceutical Sales (\$ billion)



Indian  
Pharmaceutical  
Industry

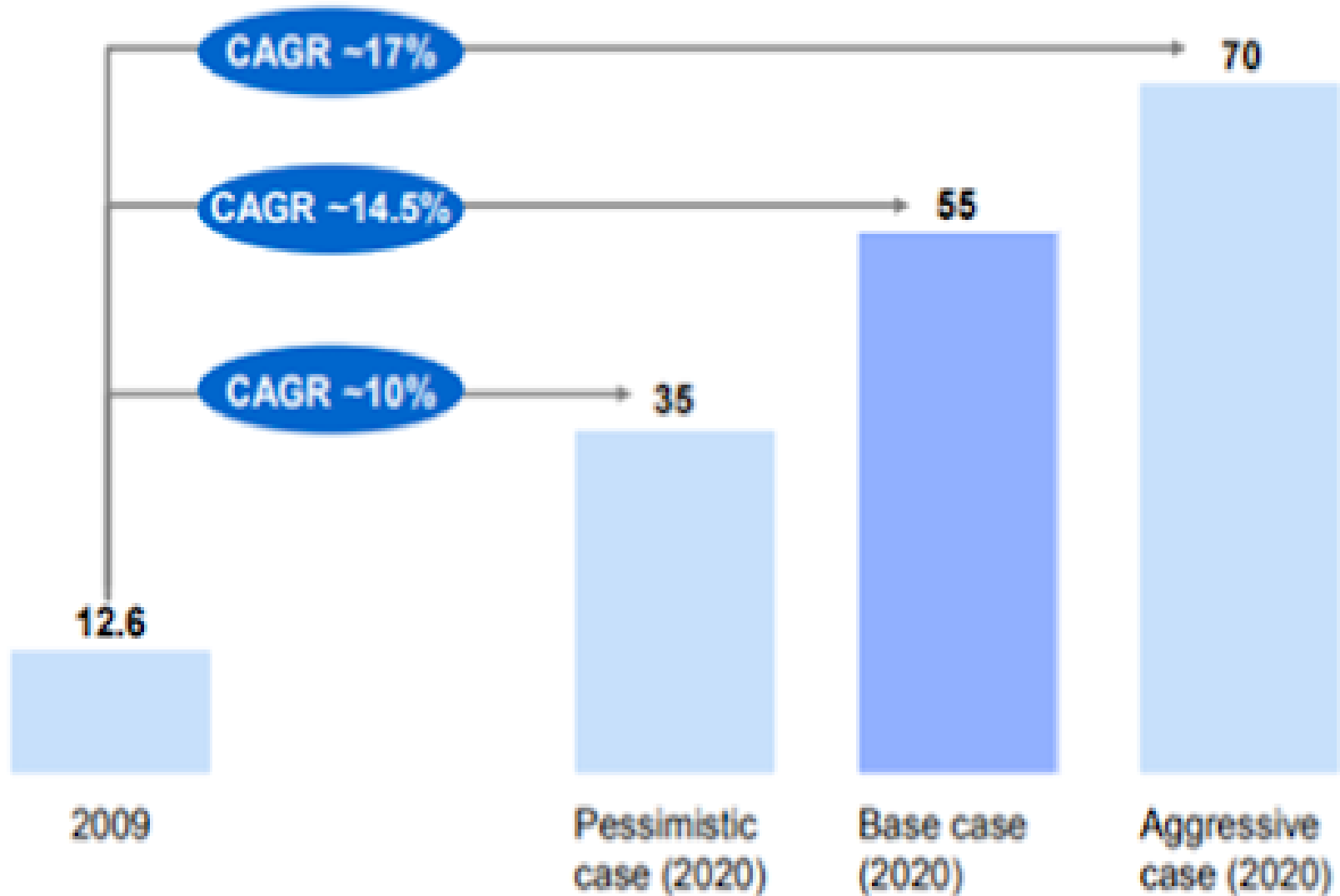
# QUEST FOR GLOBAL DOMINANCE





## Projected size of Indian pharma market

USD billion



## Q3FY20 sales of India pharma companies

Company	Sale Growth (%)	Sales Dec 2019 (Rs Cr)
Sun Pharma	10	3038
Abbott	8.3	2287
Cipla	7	1744
Cadila	12.1	1531
Lupin	10.9	1400
Alkem	10.9	1316
Torrent Pharma	11.9	1145
Dr Reddy's	22.7	912
Glenmark	13.9	891

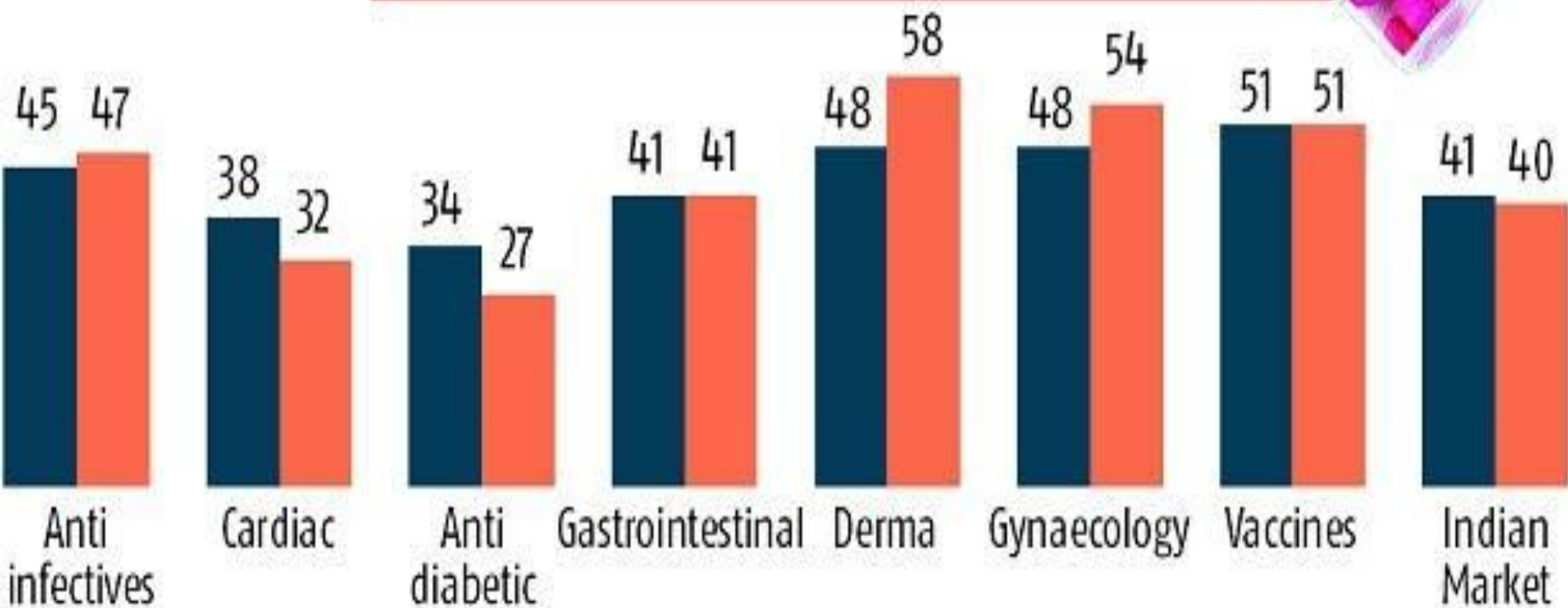
# INVENTORY OF MEDICINES

Stock in days as on

■ Feb 20

■ Mar 20

Apart from overall 7 weeks inventory at distributor level, there is 4-6 weeks inventory at pharma company depot and average 7-10 days inventory at retail leading to a cumulative medicine stock of 13 weeks or almost 3 months

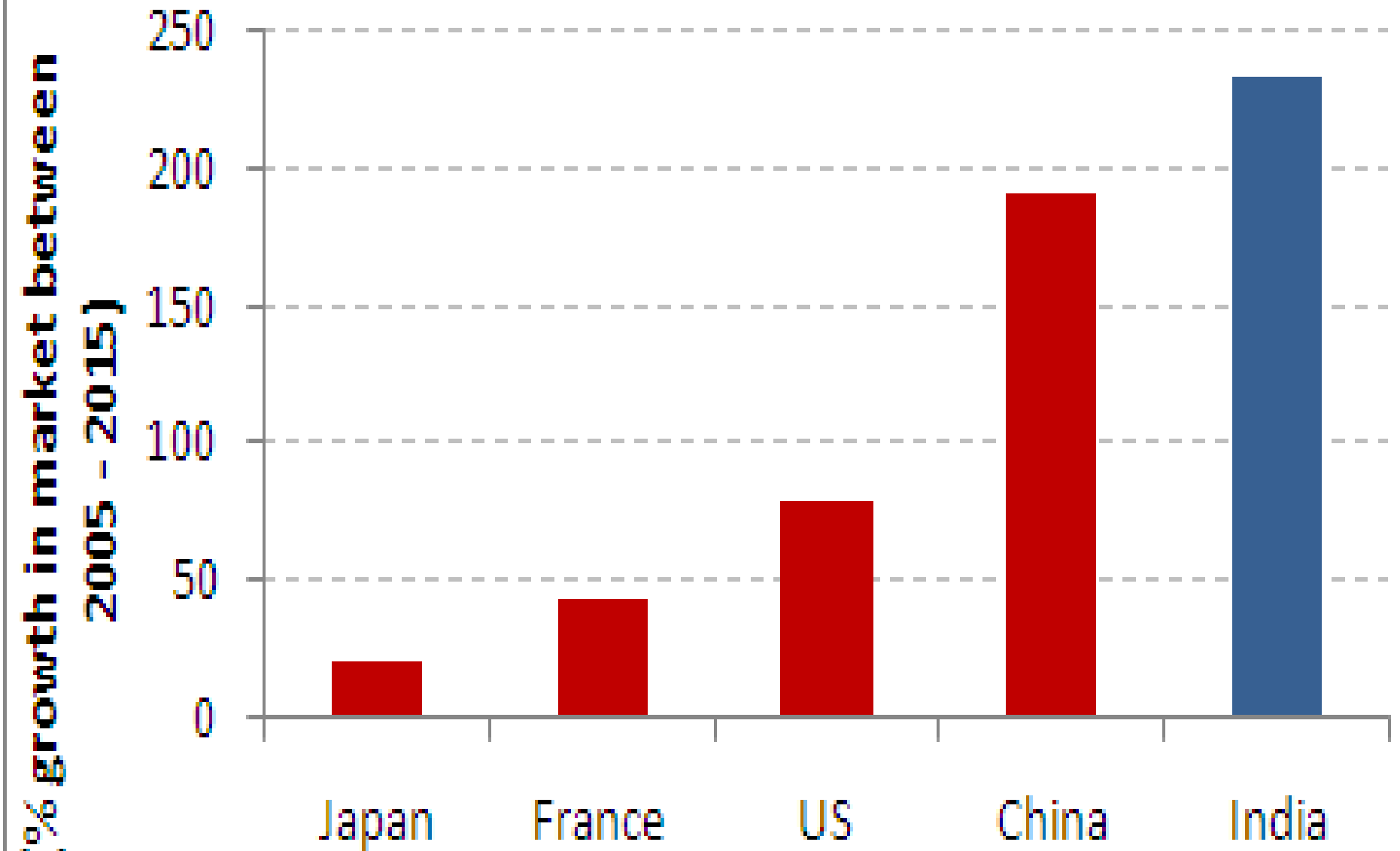


# International Players

Company	Net Sales (2012 \$ Bn)	Employees
Johnson & Johnson (USA)	67.2	117,000
Pfizer (USA)	58.9	91,000
Novartis (Switzerland)	56.7	115,000
Roche (Switzerland)	47.8	80,000
Merck (USA)	47.3	86,000
Sanofi (French)	46.4	113,000
GlaxoSmithKline (UK)	39.9	97,000

*Source: [fiercepharma.com/special-reports/top-pharma-companies-2012-revenues](http://fiercepharma.com/special-reports/top-pharma-companies-2012-revenues)*

# India to top growth in pharma market



# GLOBAL PHARMA CM PROMO FILM





# Big Pharma Jobs

India's No.1 Pharma Recruitment Company

## Top 5 Best Pharma Companies in India

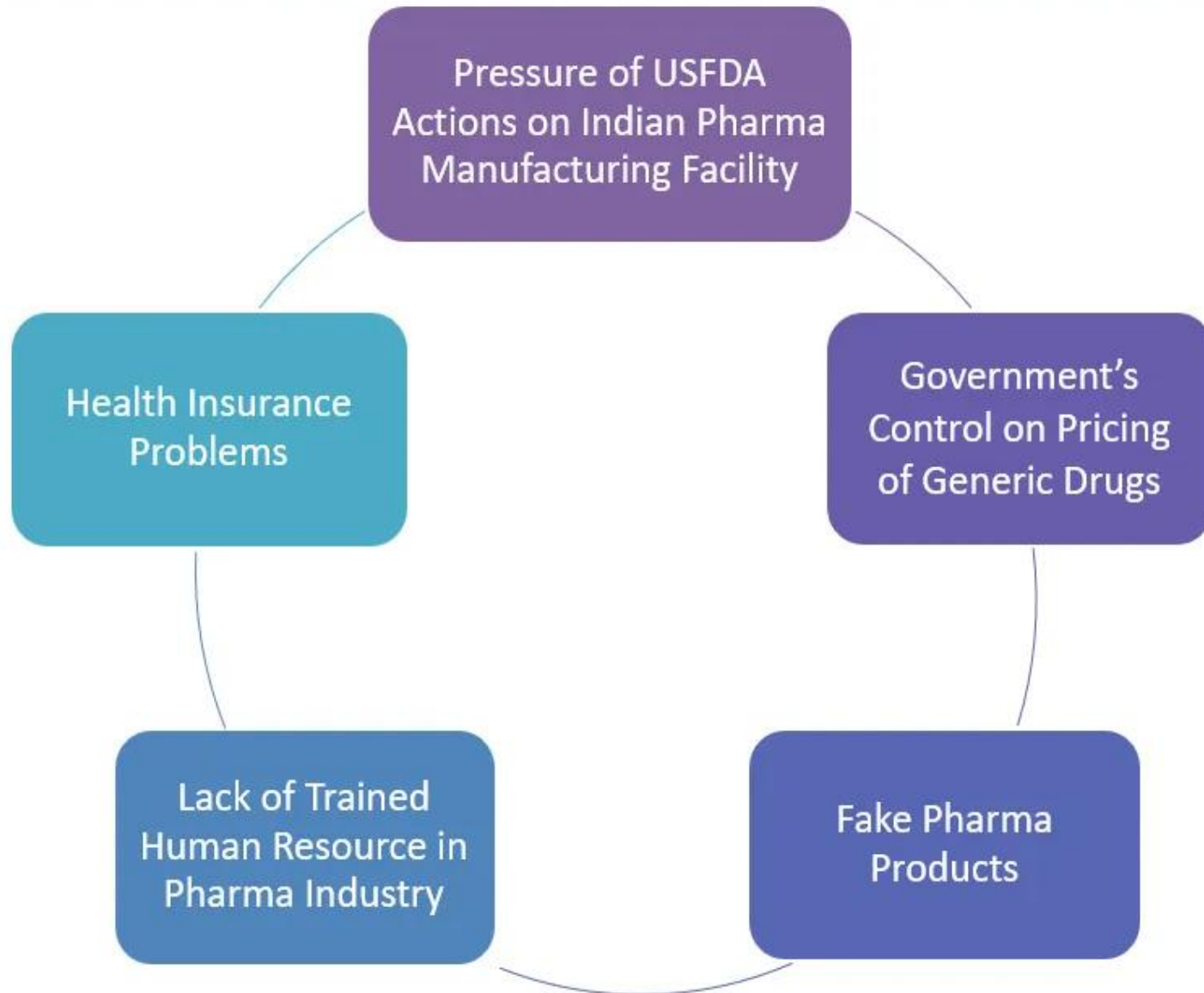
- 1 **SUN PHARMACEUTICAL INDUSTRIES LTD.**
- 2 **Lupin Limited**
- 3 **DR. REDDY'S LABORATORIES**
- 4 **CIPLA**
- 5 **AUROBINDO PHARMA LIMITED**

MESCO Institute of Management & Computer Sciences, Mustaidpura, Hyderabad.

[www.bigpharmajobs.in](http://www.bigpharmajobs.in)



# Analysis of Indian Pharma Sector – 5 Key Challenges



Key Challenges	Step change
1 Cost Pressures on the industry	From margin driven to cost driven
2 Changing Commercial Business Model	From indirect to direct marketing and sales
3 More Responsive Supply Chains	From “push” to “pull” driven
4 Information and Visibility	From black box to information highway
5 Final Mile Delivery Component	From one fits all to product/market/customer choice
6 Collaboration and Partnership	From single to collaborative supply chains
7 Leadership and Change Management	From fragmented to single chain of command
8 The role of e-commerce	From manual and indirect order2cash to online, automated and direct

# Challenges in Research & Development

- Pipeline
  - Patients expiring
  - Insufficient drugs to fill current pipeline
  - Pressure for scientist developed
- Shifting R&D towards new innovation
  - Change in focus to developing new drugs
  - Exhausted incrementally modified drugs (IME)
- Time lag to an output gap
  - Average of 10-15 years to develop new drugs from discovery to approval
  - Increase in average R&D cost \$800m - \$1bn due to many failure of drugs during clinical trials
  - Rigorous testing for safety and effectiveness



# Global Pharmaceutical Industry Challenges



Increased competition from generic drugs



Keeping up with technology



Global quality control



Patent cliffs

# The world's affordable pharmacy is...

CNN Money







# THANKYOU

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