



# The Indian Pharma Industry

Project 1 Interaction Design

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Interaction Design

IDC  
IIT Bombay, 2008

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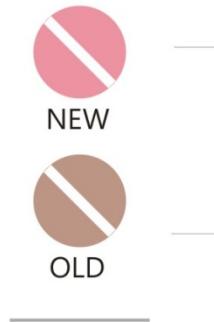
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## Introduction

- India is a 'branded generic' pharma market. A given molecule is available at various price points and marketed under different brand names.
- Hence it becomes necessary to analyse brand positioning strategies adopted and challenges faced by marketing and sales people across the industry.
- Making observation on the Indian Pharma-Market Dynamics by mapping marketing strategies for application or facing challenges.
- Find Design opportunities to facilitate effective communication.



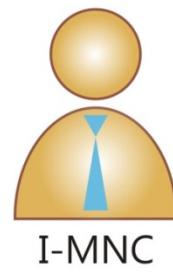
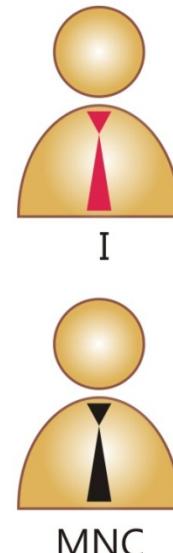
THERAPY



LIFECYCLE

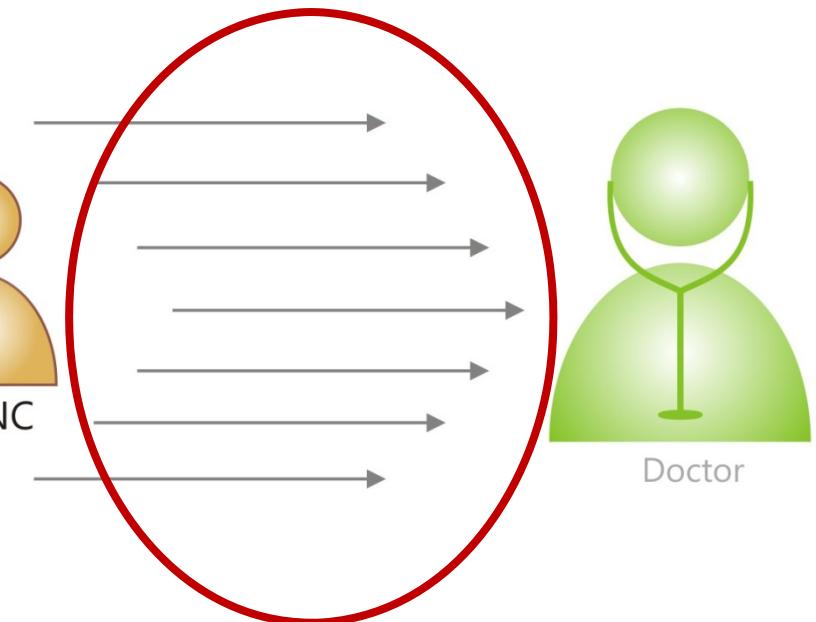


MARKET



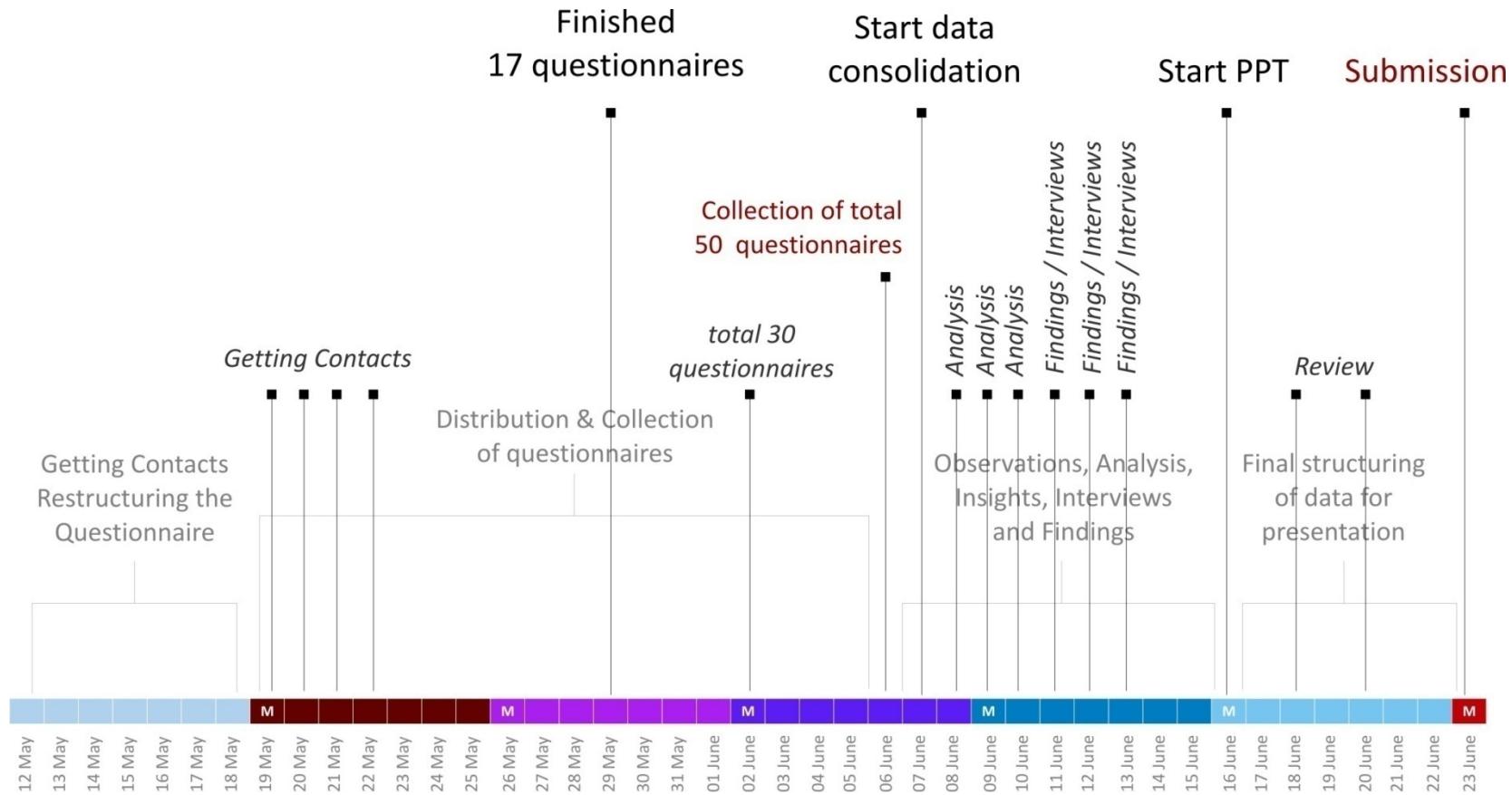
Representatives

How?



I - Indian Pharma  
I-MNC - Indian Multinational  
MNC - Multinational

# Project Timeline



## Data Collection

- The Pharma Industry – ORG | ims
  - Distribution of market and products
  - Top 10 companies
  - Top 10 product

Top 10 Companies

Company	% Mrkt
1 CIPLA	5.4
2 GLAXOSMITHKLINE	4.36
3 NICHOLAS PIRAMAL	3.52
4 SUN PHARMA	3.35
5 ALKEM	2.56
6 LUPIN LABS	2.72
7 ZYDUS CADILA	2.4
8 RANBAXY	2.38
9 DR REDDYS LABS	2.39
10 ABBOTT	2.29

Top 10 Products

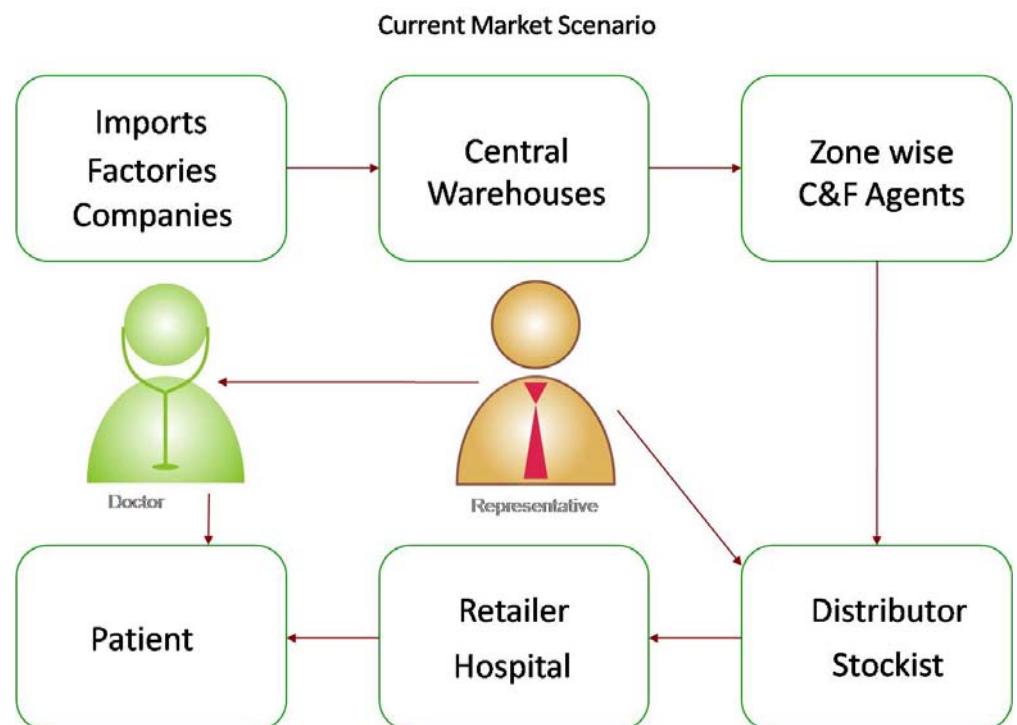
Product	Company
1 COREX	Pfizer
2 VOVERAN	Novartis
3 HUMAN MIXTARD 30/70	Abbott
4 Liv – 52	Himalaya Drug
5 TAXIM	Alkem
6 PHENSEDYL COUGH	Nicholas Piramal
7 AUGMENTIN	GSK
8 BECOUSULES	Pfizer
9 ZIFI	FDC
10 DEXORANGE	Franco Indian

## Data Collection

- The Stakeholders

Visiting various companies and distribution units to know how they function.

Interviews to know their idea of the branded generic market & practices adopted.



## Data Collection

- Companies Visited



## Interviews and Analysis

- A questionnaire was developed to gather information from various people in the pharma industry.
- A screener helped us focus on the data collection.
  - Brand Manager / Marketing Manager / Sales Manager in a Pharma company
  - He / she must be about below 40 years of age.
  - 10 – 15 years experience.
- The questionnaire was divided into 3 sections.

### Section 1: Preliminary Information

To identify the experience of individual over a period and across companies.

To know the area of experience.

Preliminary Information:			
Name:			
Age:			
Designation:			
<i>put an 'X' in the corresponding box</i>			
<b>CURRENT ZONE</b>		<b>CITIES YOU HAVE WORKED IN</b>	
North			
South			
East			
West			
<i>State where you have experience: put an 'X' in the corresponding box</i>			
<b>PRODUCT TYPE</b>		<b>PRODUCT LIFECYCLE</b>	
Acute Therapy		New	
Chronic Therapy		Old	
Hospital/ICU/CCU			
<b>MARKET</b>			
Urban			
Rural			

## Section 2: What Matters...

To know how important a tool is across product types, product lifecycles and markets.

Each tool was rated on a scale of 1 to 5 where 1 matters most and 5 matters least.

### Section 3: About Branding

To know how brand positioning is carried out.

- Frequency of Marketing Review
- Brand Segment Ratio
- Brand Positioning per Segment
- Frequency in change of positioning
- Brand Positioning

**ABOUT BRANDING**  
Please check the right option for the following questions: put an 'x' in the corresponding box

1. How often is a marketing mix of a brand reviewed?

Monthly  
 Quarterly  
 Half yearly  
 Annually  
 Needs based

Please give reasons for your choice:

2. How many segments a brand can focus on at a time?

One segment only  
 Maximum 2 segments  
 Maximum 3 segments  
 More than 3 segments

Please give reasons for your choice:

3. In case of more than one segment, how is Brand Positioning executed?

Single positioning for all segments  
 Different positioning for different segments  
 Other than core segment, no specific positioning

Please give reasons for your choice:

4. How often are brands repositioned?

At growth stagnancy  
 When segment focus is shifted  
 When target specialist is changed  
 Due to launch of line extension  
 When a new brand is launched in same / similar category

Please give reasons for your choice:

5. Brands are most often positioned based on...

Brands intrinsic key feature  
 Benefit sought by a particular (key target) specialist  
 Overall benefit relevant to specialists  
 Overall benefit relevant to total target customers  
 Outcome expected by the patients of the focus segment

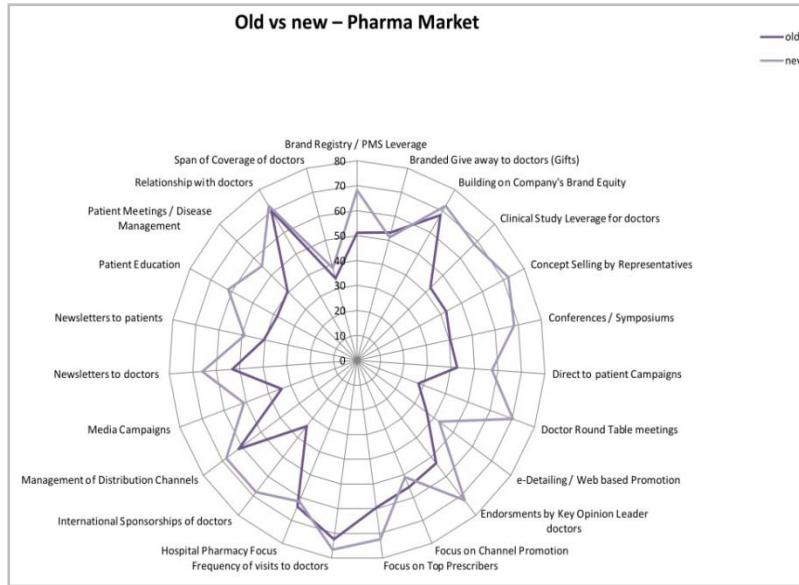
Please give reasons for your choice:

Feedback:

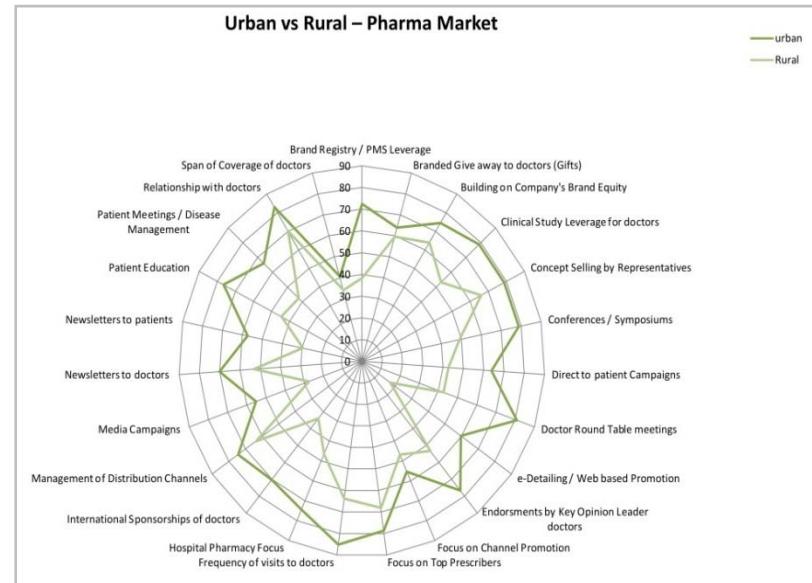
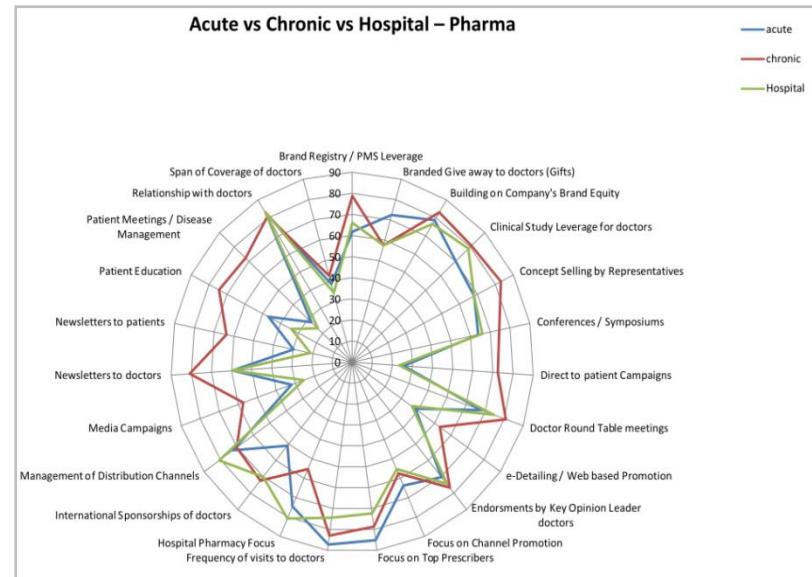
## **Analysis**

Based on the responses from the questionnaires and personal interviews, we analyzed each tool and its preference in the market.

Graphs on following page.



Values in % people



## Design Opportunities

- Frequency of visit to Doctors

This was rated as the most preferred tool. The doctor needs to be constantly reminded about the product. Salesmen wait outside the doctors clinic for hours to get a chance to speak with him. Despite the frequent visits and updating of doctors certain products manage to carve out a substantial share in the market because of confusing marketing tactics.

Molecule: Pregabalin – *Origin brand is Lyrica by Pfizer*



Indian

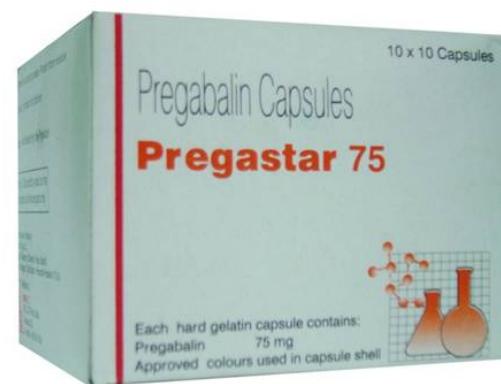


Rs. 830 for 100 capsules

All four brands are promoted in the neurology segment.



Indian MNC



Rs. 760 for 100 capsules

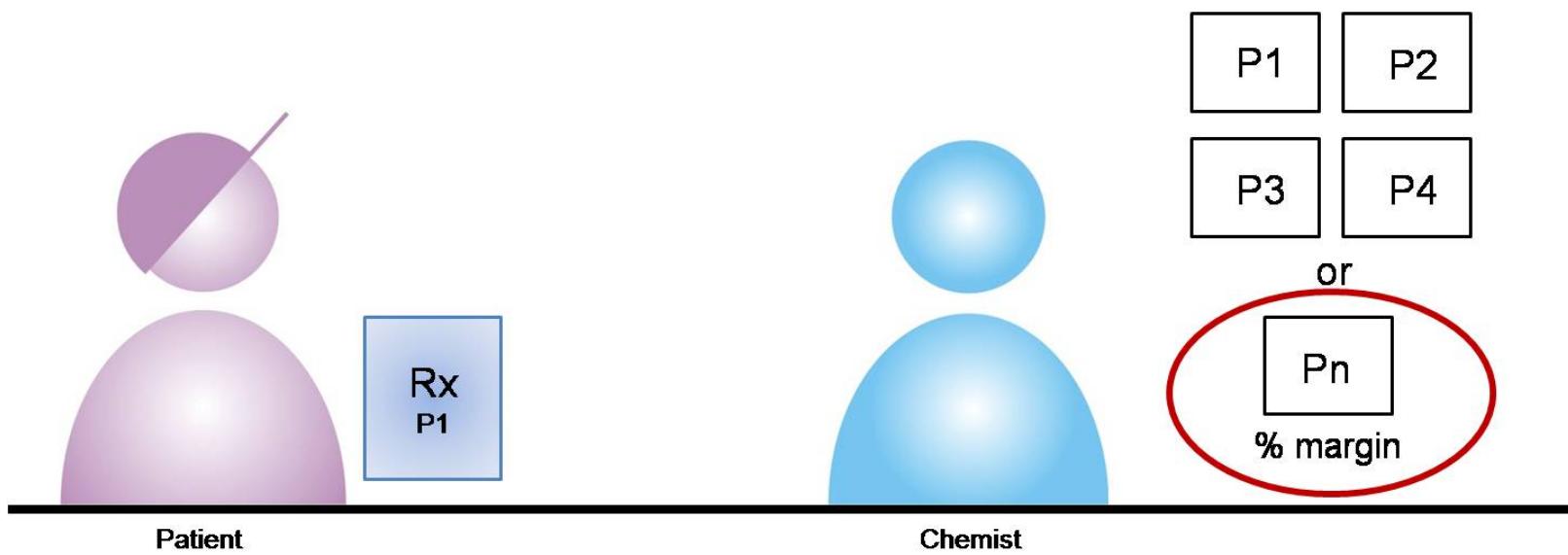
# A Confusing Marketing Tactic

Giving similar sounding names.



# Gives way to Substitution

on the chemist counter where ultimately  
a local brand may be sold due to margin factor.



Colcin



Crocin



Both priced at Rs. 15 per strip

not suitable for children under the age of 12 years.  
PATIENT ADVICE : Should not be used with other Paracetamol containing products,  
contraindicated in patients with known Paracetamol hypersensitivity; seek medical advice if you  
are suffering from liver or kidney impairment; Overdose may be injurious to liver.

Marketed in India by  
**ENDOLABS**  
HEALTHCARE PVT. LTD.  
An ISO 9001:2000 Certified Company  
Village-Sikandarpur, Bhaiswal,  
Nr. Bhagwanpur, Roopkee-247 661  
B. O. : C-Pacific - 27, Bobrias,  
Barcellana, SPAIN-08027, EUROPE.

Manufactured by : Pro Laboratories (P) Ltd  
140-141, Makkanpur, Bhagwanpur, Roopkee,  
Dist. Hardwar-247661  
Store in cool dry & dark place  
Keep all medicines out of reach of children  
Protect from light.  
Mfg. Lic. No. 33/UA/2006



Cipcal - Cipla



Shelcal – Elder Pharma



Rs. 39.90 per strip

Rs. 44 per strip

## Design Opportunities

- Conferences and Symposiums

Setup to educate doctors collectively where they can debate and learn about the products or discuss issues related to the drug. It's a one sided presentation with Q&A. The tool was also given high importance in the new product lifecycle and in the urban market.

A system that allows the doctors to access information and allows him to connect to the company salesman.

## Design Opportunities

- Patient meetings and disease management.

This tool was given high importance in the chronic segment. Often the patients and doctors meet to discuss issues faced and how to overcome them with help of medication. A system that will enable the patients to connect to each and to doctors. Helping faster problem solving.

- Direct to Patient Campaigns

Targeting patients directly by offering a lower price and home delivery.

A system that connects the patient to a distributor and company so that he can get medication at a discounted price at his home and on time so he is never out of stock when his dose is over.

## Design Opportunities

- Patient Education

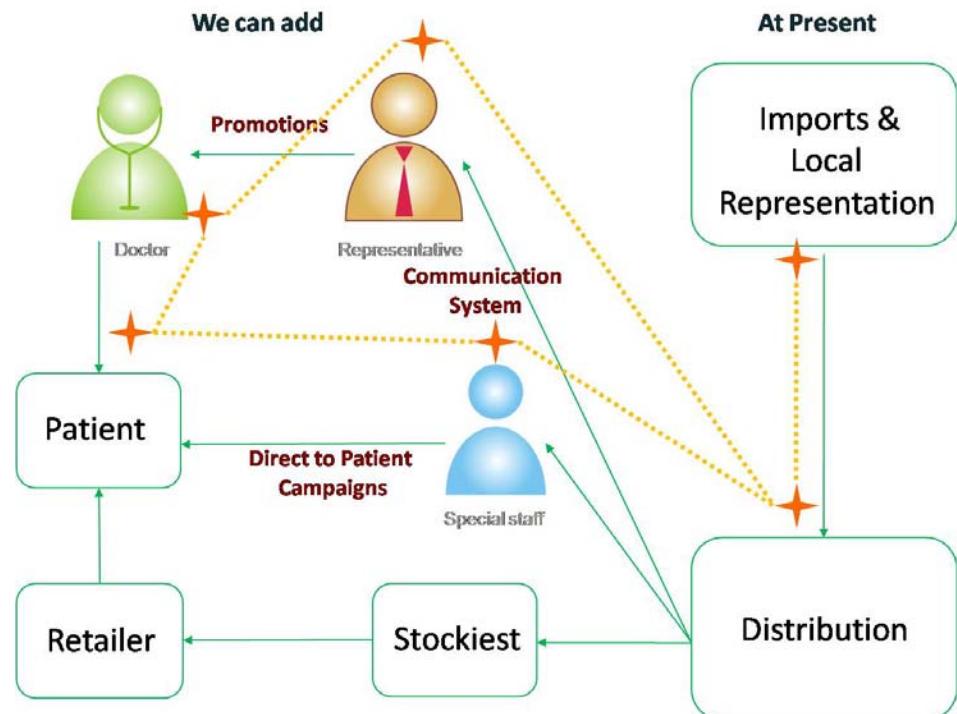
Direct education of patients (more in case of chronic therapy) usually via fliers and educational material given to doctor to keep in his clinic or waiting room. An interactive system that makes use of patients time in the waiting area of the clinics that allows him to access his profile with the doctors and thereby get further information on disease and diagnosis.

## Design Opportunities

- Management of distribution channels

Management of the process of distribution so that medicines reach from one point to another efficiently.

Consolidation of various distribution channels so that efficient movement of goods is ensured.



## Learning

This was my first industrial experience and was good, learned so many basic things to be followed in the Industry, the most important is the process that I learned to be followed in the industry for handling Interaction related projects, industry has a total different process to be followed to deal with the projects and the process that they follow is a little shortcut, than what we are taught here in IDC, they have a total different methodology and ways of looking at things.

## Acknowledgements

Dr. Devdutt Pattanaik, *Project Guide*

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Mr. Kanan, *Cipla*

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