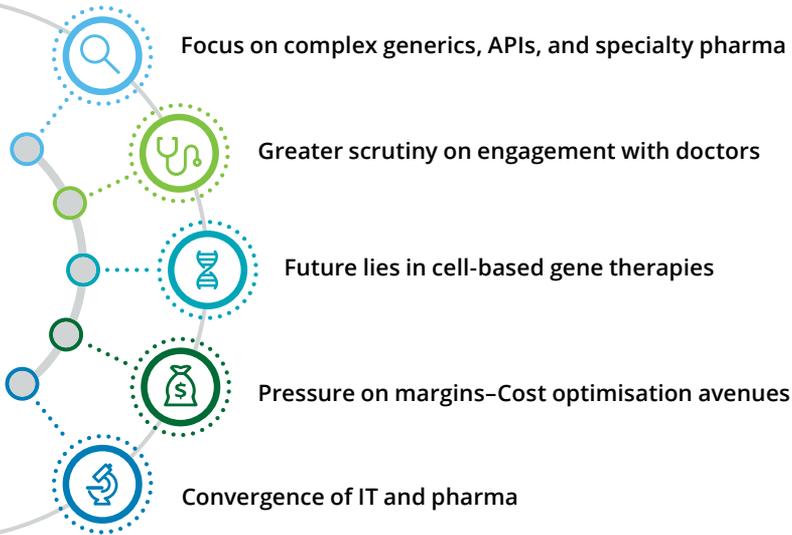


# Life science–Snapshot of the Indian market

- The size of India's pharmaceuticals market is US\$20.49 billion in 2018. It is estimated to reach US\$52.61 billion by the end of 2028.
- Domestic active Pharma ingredients (API) consumption is expected to reach US\$18.8 billion by FY2021. The domestic generics market is expected to reach US\$39.1 billion by 2028.
- India is the world's largest provider of generic medicines; the country's generic drugs account for 20% of the global generic drug exports (in terms of volume).
- Generic drugs with a 70% market share form the largest segment of the Indian pharmaceutical sector. Over-the-counter (OTC) medicines constitute about 21% of the market, while patented drugs have a 9% share.



Sources: Pharmaceuticals and Healthcare Report by Fitch Q2 2019, IBEF, DIPP, Deloitte Report.

## Key consideration



### Cost visibility



#### Why?

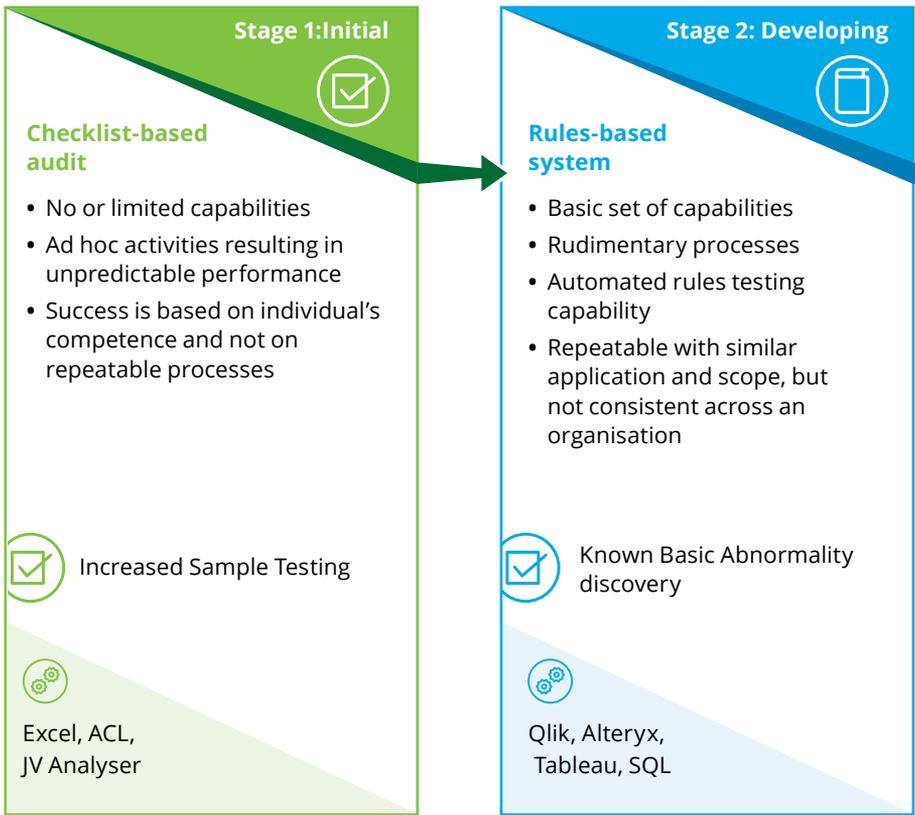
- The most daunting question for pharmaceutical companies with recent shift towards consumer-oriented markets and rapid spurt of new contenders in generics market, is how to ensure 'cost transparency'.
- Be it the release of a new pharmaceutical, or cost of servicing a customer (doctor/hospital), understanding the cost relationship and driver maintaining the optimum level of visibility is the need of the hour.



#### Where data analytics can help?

- Inventory planning errors – Variation in primary and secondary sales may send erroneous signals to planners, leading to excess inventory
- Centralisation of procurement – Analysing rate variances for same materials across geographies and vendors to arrive at the most optimum rate for procurement
- Mapping of marketing spend to key customer segments and tracking it
- Freight and landing cost analytics – Analysing the trend in distributing freight and landing costs due to the non-utilisation of rates and ensuring transaction executions at spot rates

# Analytics-Maturity model



Descriptive Analytics and Data visualization

Outcome

Tools



## Controller insight



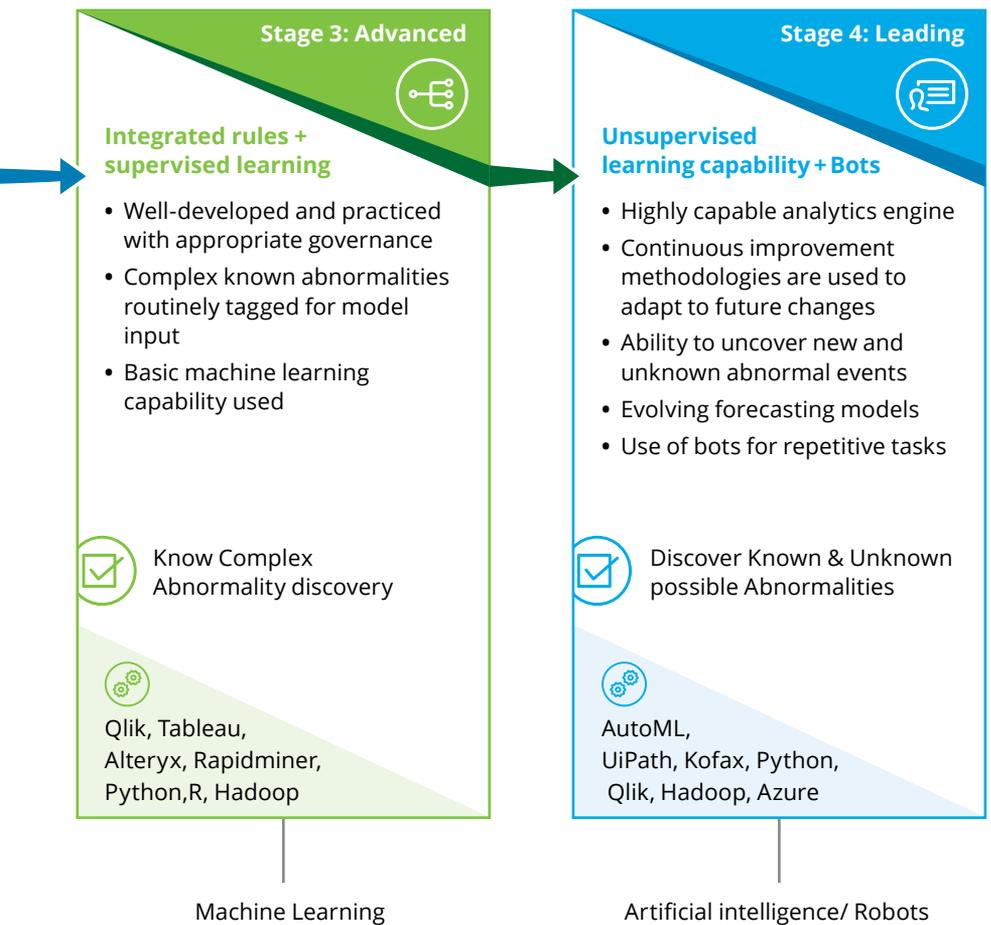
### Why?

- Finance controllers and finance business partners are always looking for insights and opportunities to generate and add value. Advance analytics, coupled with data modelling, can provide valuable insights and support “What-if” scenarios; thereby permitting risk-driven decision-making.



### Where data analytics can help?

- What is the cost and profitability of each territory?
- In terms of current ROI, what is the additional spend required to generate target revenue? Do we need to restrict or consolidate certain efforts and spends on certain territories and invest more in others?
- How is the product portfolio moving? Is there a need to spend increased advertising to penetrate further?
- How are our channel segments performing? What is the impact of discounts and other schemes on channel behaviour?



## Compliance optimisation

### Why?

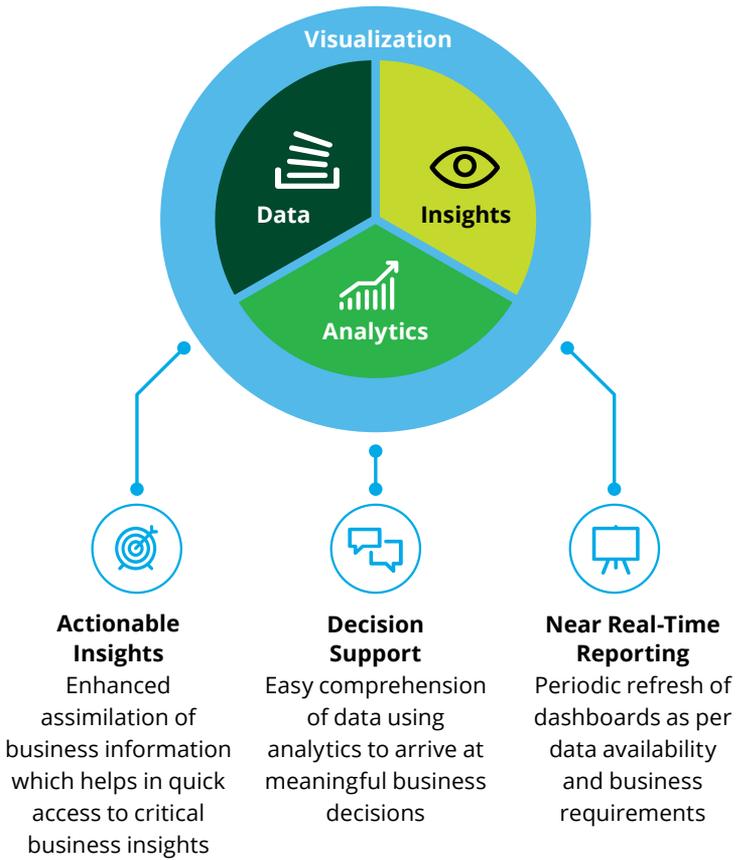
- With a dynamic market, frequent regulatory changes are required to maintain a healthy and sustainable business. This regulatory change a.k.a. 'compliance' needs to be addressed first hand. Data analytics can help keep a check on your key financial risks defined as per the risk and control matrix (RCM) by utilizing workflow based analytics and interactive dashboards.

### Where data analytics can help?

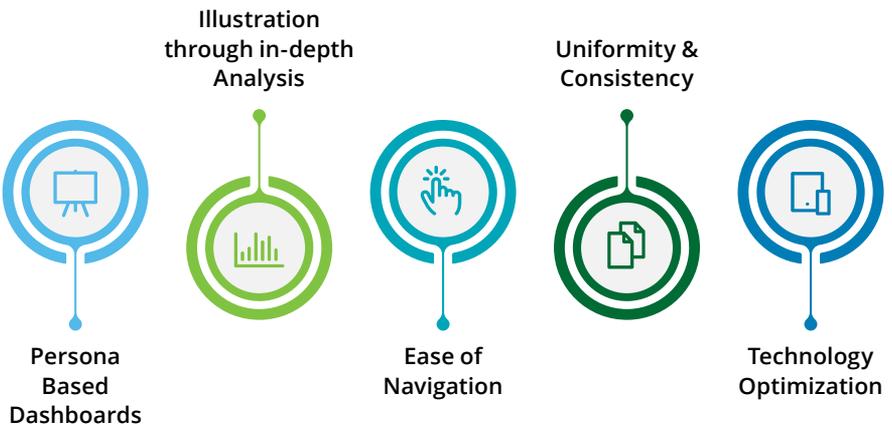
- Evaluation of credit notes – Assessment of additional cost incurred due to excess quantity returned and possibility of the return of spurious drugs; claims submitted for same supplies done to same customer at special rates
- Analysing spends on doctor – Identification of doctors who have duplicate entries in the system using advance fuzzy matching algorithms and determining dispatch of promotional materials, leading to non-compliance of statutory requirements

# Generating business value through analytics

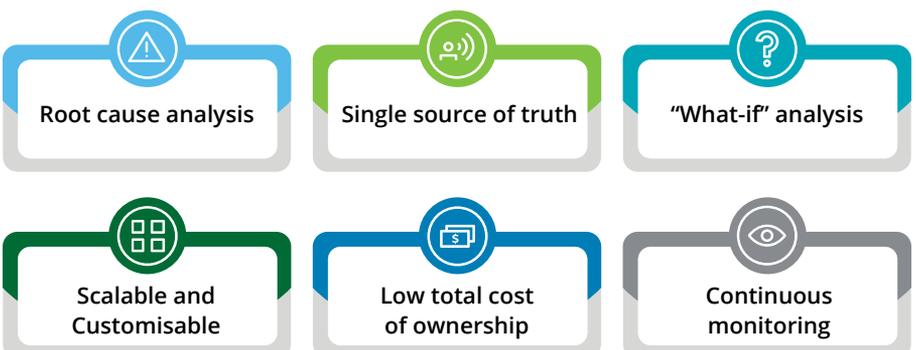
Our solution is aligned to your business objectives and industry best practices.



## Visualization Design Principles



## Key benefits



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