

Anti-TB drug market continues to shrink for private firms

Companies selling anti-TB medicines are now shifting focus to government tender business

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The private market for anti-tuberculosis (TB) has been slowing down for the past few years as it has been shifting towards institutional sales. India is committed to ending TB by 2025, five years ahead of the Global Sustainable Development target.

The data taken from market research firm AIOCD AWACS shows that the private (retail sales) market for anti-TB clocked a negative 2.9 per cent five-year compounded annual growth rate (CAGR) in terms of value. In terms of unit sales, it registered a negative 6.6 per cent CAGR.

Companies that sell anti-TB drugs are, thus, shifting focus to the government tender business.

Lupin, the largest player in India's anti-TB market, too, admitted that the focus on branded business has declined in the past few years.

Nilesh Gupta, managing director of Lupin, said: "The branded business is only less than 5 per cent of India region business. The market is moving from a trade perspective to an institution perspective."

Lupin is the market leader in the trade market for anti-TB medicines in India with a 63 per cent share. It has, in fact, managed to grow its share even as the market growth slowed — from 60.4 per cent in FY18 to 63 per cent in FY19, showed the AIOCD AWACS data.

Lupin has four products in the top five anti-TB brands sold in India. However, the company has shifted focus to the institutional sales segment not only in India but globally. "We are one of the biggest suppliers for global institutions that buy for TB. Even in India has a significant purchase where we participate. In Ehambutol, we account for 90 per cent of the global supplies, and 30 per cent of the global finished

BITTER PILL



supplies," Gupta said.

TB kills an estimated 480,000 Indians yearly and more than 1,400 every day. India also has more than a million 'missing' cases every year that are not

VALUE-WISE MARKET SIZE

₹364.2 cr FY18
₹363.1 cr FY19
5-YR CAGR FY19 value -2.9%
unit -6.6%

MARKET SHARE & GROWTH RATE

Company	M&T value		FY19 value growth (%)
	FY18 (%)	FY19 (%)	
Lupin	60.42	62.96	3.89
Macleods Pharmaceuticals	23.99	22.24	-7.65
Cadila Pharmaceuticals	8.53	9.01	5.34
Conceat Pharmaceuticals	4.09	3.56	-12.72
Marneesh Pharmaceuticals	0.33	0.53	60.78

M&T: Having annual turnover

TOP 5 BRANDS

Brand	Company	M&T value market share FY19 (%)
R-cinex	Lupin	13.28
Forecox	Macleods	7.91
Alaurit-4	Lupin	7.23
Combutol	Lupin	7.16
AICT-4	Lupin	6.73

cases were reported by the private sector, according to the Ministry of Health and Family Welfare data.

As the branded market shrinks, players such as Lupin, Macleods Pharmaceuticals are shifting focus to the tender business.

"The market for TB drugs is expected to shrink as the target is to eradicate the disease by 2025. There still remains a significant opportunity to supply to international tenders. However, in India too many cases are still undiagnosed or not reported. The trade business would continue, but the number of players operating in the segment may reduce," said an industry insider. The government, on its part, is trying to improve TB mapping, screening, and diagnostics.

Last week, the Central TB Division of the Health Ministry signed a memorandum of understanding with Wadhwani Institute for Artificial Intelligence to explore the application of artificial intelligence technology in its fight against TB. It is estimated that around 64 per cent of the new and relapsed cases are reported globally.

notified TB cases from both public and private sector providers.

Between January 1 and September 3, a total of 11,20,290 TB cases were notified from public providers, while 4,22,501

notified and most remain either undiagnosed or unaccountably and inadequately diagnosed and treated in the private sector.

In 2012, it was made mandatory to

Source: AIOCD AWACS