

Identify Licensing Opportunities through Market and Product Mapping

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Comments by the Faculty

The total global spending on medicines will reach a whopping \$1.3 trillion in 2018, an increase of \$290-320 billion from 2013, driven by population growth, an aging population, and improved access in pharmerging markets.

Pharmaceutical Drug Delivery companies continuously look to map new markets and products to identify clients for the drug licensing opportunities. The term Pharmerging markets is a combination of the terms PHARMACEUTICAL + EMERGING. It is used for the emerging markets in pharmaceutical industries where the pharma industry has opportunities to grow, whereas currently developed pharma markets are getting saturated in terms of growth and are termed as MATURE MARKETS.

A study conducted by IMS, primarily divided the global economy into developed and emerging sectors, using the criteria of per capita GDP threshold of US \$25,000. The emerging countries were then sub-divided using market data forecasts from IMS Market Prognosis. The market data forecasts are based on a rigorous evaluation of the key events impacting the pharmaceutical and healthcare industries worldwide. The latest and refined definition ranked Pharmerging markets on the basis of their minimum anticipated added value to the total pharmaceutical market (Global Pharmaceutical market) between 2012 and 2016. Latest evaluation was done in December 2012.

Between 2012 and 2017, Pharmerging markets are predicted to have growth rates far higher than in mature markets. Forecast is 13% CAGR 201-2017 Vs. 2% for the top 8 mature markets.

The work done in the internship Project details the same for Athena Drug Delivery Solutions Pvt. Ltd.,

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Objectives

The objectives of the project are

- To identify the licensing opportunities in the given markets (Territory, Region) for the product dossiers provided by Athena Drug Delivery Solutions.
- To identify potential clients.

About Athena Drug Delivery Solutions Pvt Ltd.,

Alexandre Williams, a Pharmacist Doctor with a master's degree in Business & Administration, acquired ETHYPHARM Indian Operations in February 2011 (Established in India in the year 1998) which was then spin-off as ATHENA DRUG DELIVERY SOLUTIONS (Athena DDS). Alexandre Williams is the Chairman of Athena DDS.

Athena DDS is a leading in innovation and oral drug delivery with more than 150 people dedicated to drug delivery. Athena DDS develops new and innovative products on its various platform technologies.

The vision of the company is to build a world class Speciality pharma and drug Delivery Company. Athena believes in decades ahead, it believes that priority is patient compliance and convenience and bringing healthcare at all affordable prizes is the most critical parameter for Athena.

The mission of the company is to be a partner of choice for life cycle management. Athena aspires to be the global leader in specialty pharma, innovation and drug delivery. It aspires to become partner of choice for their life cycle management requirement for mature products with a mission to enhance value to patients and improve compliance which is critical for any treatment.

Business Model

Athena is predominantly a **Business-to-Business specialty pharmaceutical** company and works on **client centric model**. Athena uses its **technology platforms** to develop, scale up and commercialize products for their clients for various advanced and pharmerging markets.

Territories Studied – Four territories were studied i.e.

1. CIS (Commonwealth Of Independent States)
2. MENA (Middle East and North Africa)
3. Eastern Europe
4. South East Asia

Commonwealth of Independent States (CIS)

The Commonwealth of Independent States, also known as Russian Commonwealth is a regional organization. CIS comprises of Russia, Ukraine, Belarus, Moldova, Armenia, Kazakhstan, Uzbekistan, Tajikistan, Azerbaijan, Turkmenistan and Kyrgyzstan.

Middle East and North Africa (MENA)

The term **MENA** is an acronym referring to the Middle East and North Africa region. The term MENA covers an extensive region, extending from Morocco to Iran, including all Middle Eastern and Maghreb countries. The term is roughly synonymous with the term the Greater Middle East. MENA comprises of Egypt, Algeria, Bahrain, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Yemen, UAE, Libya, Morocco, Qatar, Oman, Saudi Arabia, Syria, and Tunisia.

Eastern Europe

This is the eastern part of European Continent. Eastern Europe is a region that encompasses many different cultures, ethnicities, languages, and histories. Grouping all of these countries under a single designation can sometimes be problematic; experts, scholars, and those living there label parts of the region according to varying sets of criteria, and heated debates have been known to erupt when one party has felt that a certain country has been mis-categorized.

Eastern Europe comprises of Poland, Romania, Albania, Bosnia, Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Macedonia, Montenegro, Serbia, Slovakia, and Slovenia.

South East Asia

Southeast Asia consists of eleven countries that reach from eastern India to China, and is generally divided into "mainland" and "island" zones. The mainland (Burma, Thailand, Laos, Cambodia, and Vietnam) is actually an extension of the Asian continent. Muslims can be found in all mainland countries, but the most significant populations are in southern Thailand and western Burma (Arakan). South East Asia comprises of Vietnam, Indonesia, Thailand, Malaysia, Singapore, Philippines, Burma, Brunei, Cambodia, Laos, and Timor Leste.

Pharmerging Markets

Pharmerging market term has produced from two terms i.e. **PHARMACEUTICAL + EMERGING** market. These are thus the emerging market in pharmaceutical industries where in pharma industry has an opportunities to grow as current developed pharma markets are getting saturated in terms of growth and are termed as **MATURE MARKETS**.

Eight Pharmerging Markets were identified among the given territories on the basis of their minimum anticipated growth contribution to the global pharmaceutical market from 2009-13.

- Russia
- Ukraine
- Egypt
- Poland
- Romania
- Vietnam
- Indonesia
- Thailand

Methodology

The Methodology adopted was to study the given territory / region regarding its demography, social and economic conditions and come up with the results regarding in which market it should enter. Study the list of formulations provided by Athena and the dossiers available with Athena.

Athena DDS is pharmaceutical manufacturing company which produces a range of pharmaceutical products and prepares dossiers of the same. It then searches potential clients to sell out or license its fully prepared dossiers. In India it has total of 20 clients. Some of them are Ranbaxy, Astra-Zeneca, Lupin, Abott, Novartis etc.

So to find out potential clients in new territories, Athena required to go for product and market mapping in order to find out:-

- Potential Markets which has demand for the products it prepares
- Key Clients in those selected market, to which the company must approach to sell out its product dossiers

Basis of Mapping

The process of mapping begins from deciding the territories in which the company wishes to enter. This is then followed by series of steps as follows:-

- Analyze the decided territories on certain parameters like socio-economic profile, demographic profile, and health profile.
- After that, find out the major pharma players in each country of the given territory and identify the key client among them on the basis of the product and product category they manufacture.

- After that select the country which has demand for the product we have and then find out the pharma companies in that territory that manufactures that product.
- Finally map the market, product and company with each other to summarize the whole research and conclude that which country and which company should be approached for which product.

Along with above parameters also study the nature of pharma market, whether it is private based, tender based or any other such specification.

On the basis of above analysis decide the market and the client to be approached depending upon the dossiers we have.

Mapping of Core Products at Athena with Markets Studied

Product	Country	Company
Domperidone, Ondansetron	Russia	Janssen Pharmaceuticals, Astra-Zeneca, Teva Pharmaceutical
	Ukraine	GSK, Pfizer
	Poland	GSK, Teva Ph'ceuticals
	Vietnam	Domesco
	Egypt	GSK, Pfizer
	Morocco	Cooper Pharma, Genpharma
	Romania	Astra-Zeneca, Pfizer, GSK, Ranbaxy
Donepezil	Russia	Novartis, Teva Pharmaceuticals, Merck, Astra Zeneca.
	Romania	Astra Zeneca, Ranbaxy, GSK,
	Vietnam	Pymepharco, Imexpharm
	Morocco	Cooper pharma, Emcure Pharmaceuticals, Bottu Laboratories.
Fenofibrate	Russia	Teva, Novartis, Merck, Astra-Zeneca
	Ukraine	GSK, Merck, Roche, Pfizer, Boehringer Ingelheim
	Romania	GSK, Merck, Astra-Zeneca, Ranbaxy, Novartis, Sanofi, Roche.
	Vietnam	DHG pharma, Traphaco, Mekophar
	Morocco	Cooper pharma, Genpharma, Emcure Ph'ceuticals
	Burma	Getz Pharma
Levocetirizine	Vietnam	Traphaco, Domesco, Mekophar, Imexpharm
	Singapore	Boehringer Ingelheim
	Romania	Novartis.
	Ukraine	Boehringer Ingelheim, Novartis
	Czech Republic	Bioveta, IMCo Pharma

Meloxicam, Mesalamine, Ibuprofen, Tramadol	Egypt	GSK, Pharco Ph'ceuticals, Pfizer, Eva Pharma, Amoun Pharma
	Syria	Aleppo Pharmaceuticals, EL Saad Pharma, Oubari Pharmaceuticals, Barakat Ph'ceutical Industry, Shifa Ph'ceutical Industry, Avenzor
	Burma	Getz Pharma
Mirtazipine	Russia	Novartis, Teva Pharmaceuticals, Merck, Astra Zeneca.
	Romania	Astra Zeneca, Ranbaxy, GSK
	Vietnam	Pymepharco.
	Morocco	Cooper pharma, Emcure Pharmaceuticals, Bottu Laboratories.
Reserpidone, Zolpidem	Russia	Novartis, Teva Pharmaceuticals, Merck, Astra Zeneca.
	Romania	Astra Zeneca, Ranbaxy, GSK,
	Vietnam	Pymepharco.
	Morocco	Cooper pharma, Emcure Pharmaceuticals, Bottu Laboratories.
Secnidazole, Sildenafil	Russia	Roche, Astra-Zeneca, Merck
	Egypt	Sanofi – Aventis, GSK, Pfizer.
	Ukraine	Sanofi – Aventis, GSK, Roche, Pfizer
	Morocco	Cooper Pharma
Voglibose, Voglibose+	Ukraine	Sanofi-Aventis, GSK,
	Romania	GSK, Ranbaxy

Conclusion

The mapping of the drugs to the Countries and the in turn to companies in the Countries is a milestone in itself. Although many pharmaceutical companies do it, the exercise is to be undertaken only when the Drugs and their potential markets are defined and understood appropriately.

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