

# Welcome to AstraZeneca

**Gagan Singh**

39<sup>th</sup> Annual General meeting

10<sup>th</sup> September 2018



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# A global, science-led biopharmaceutical company

## **Productive R&D**

- We are focused on innovative science in three therapy areas where we believe that we can make the most meaningful difference to patients.

## **Strong business**

- We have a stable business of established products and global commercial scale, with strength in emerging markets.

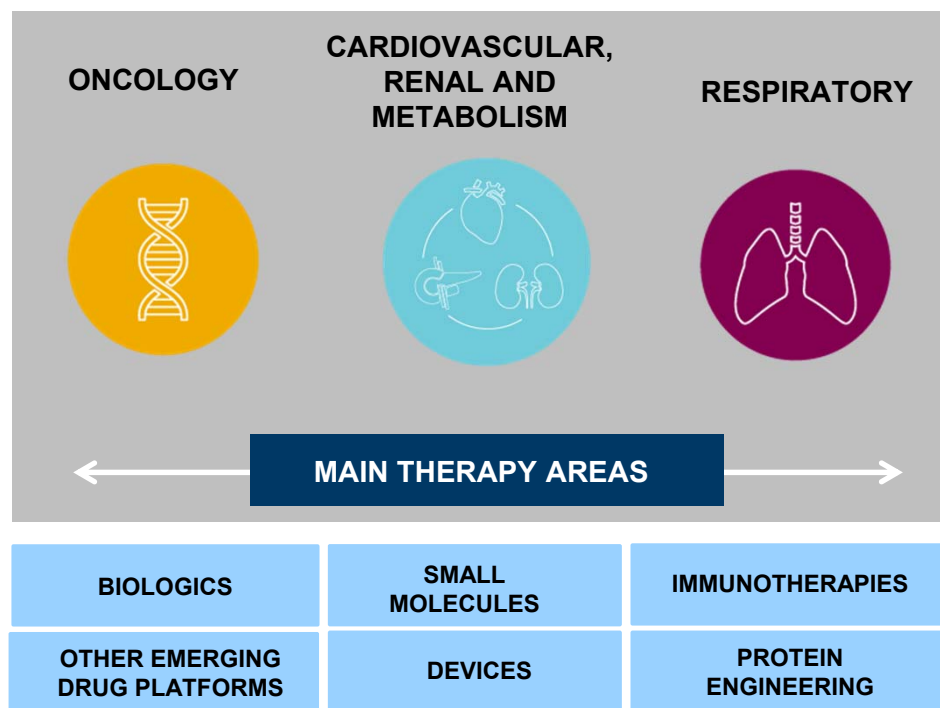
## **Sustainable organisation**

- We are building a leaner organisation, which continues to promote scientific curiosity and attract, develop and retain great people.

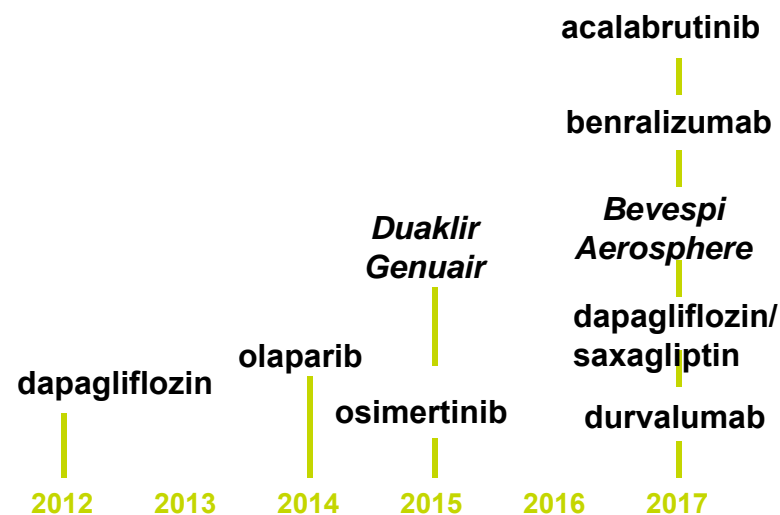


## The global pipeline forms a robust portfolio of investigational therapies in varied stages of clinical development.

**143** Projects in pipeline      **9** new molecular entities in late-stage pipeline



**New product approvals in 2017 exceed previous 5 years**



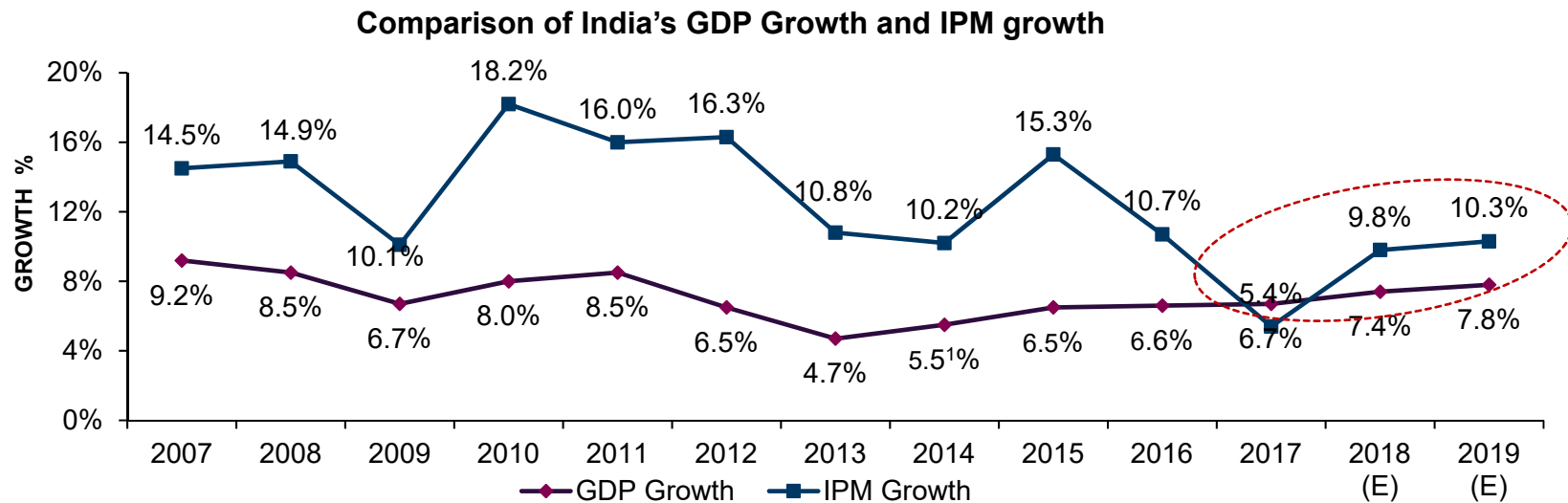
Source: <https://www.astrazeneca.com/our-science/pipeline.html> (as on 26 July 2018)

Launches in India are subject to market potential. Regulatory approval and commercial viability.

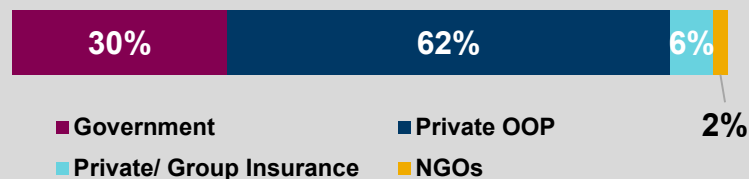


# Market Overview

**Backed by strong demand and macroeconomic factors the ₹ 127,253 Cr IPM is poised to grow at ~10% over next four years**



#### Sources of Healthcare funding in India , by Payer



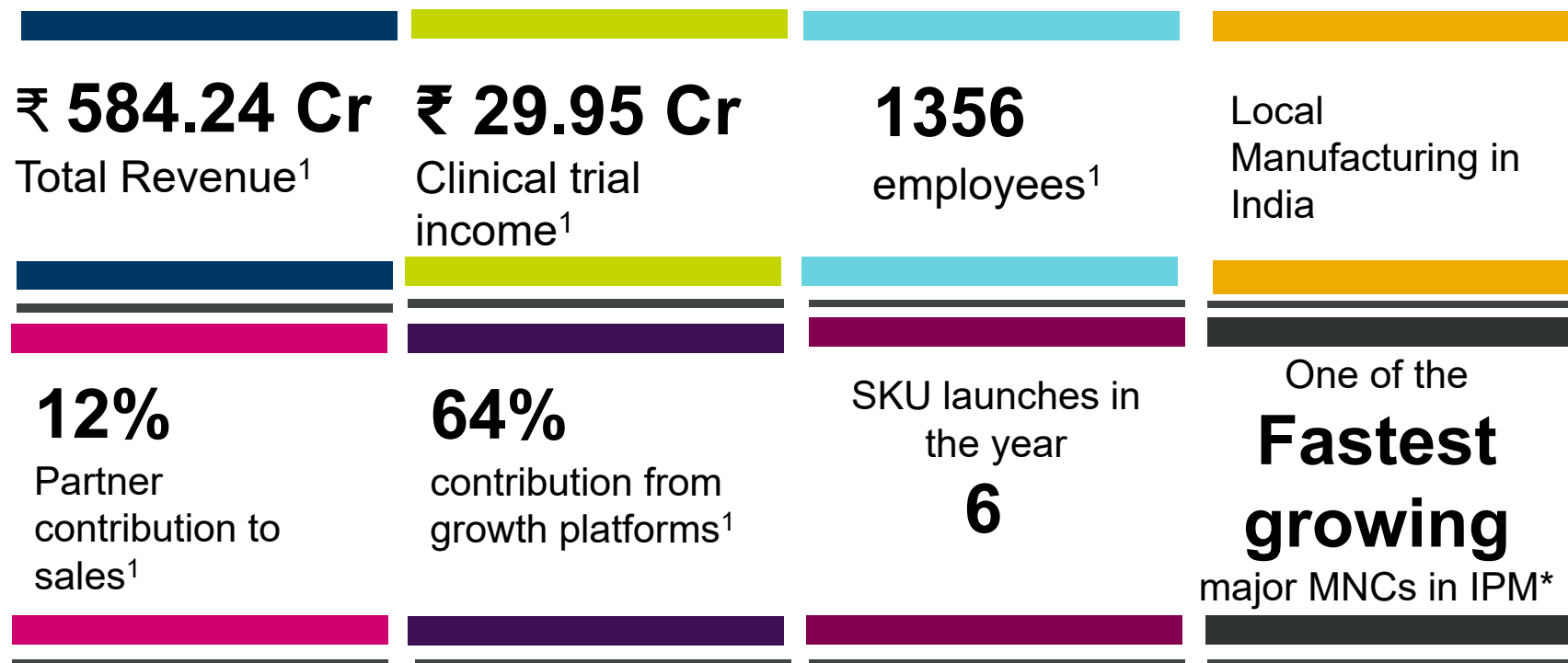
#### Ayushman Bharat (NHPS & NHP 2017)

- ✓ Healthcare **insurance for 100 mio BPL** families with insurance ceiling of **INR 5 Lakh** per family (National Health Protection Scheme-NHPS) 25<sup>th</sup> Sep 2018 onward
- ✓ **High NCD focus:** CVD, Cancer, Respiratory illnesses
- ✓ **Supportive of PPP** to achieve health goals

Source: 1. IMS Prognosis, March 2018, World Economic Outlook April 18, McKinsey India Pharma 2020, IMS Health database MAT July 2018

**AZPIL**

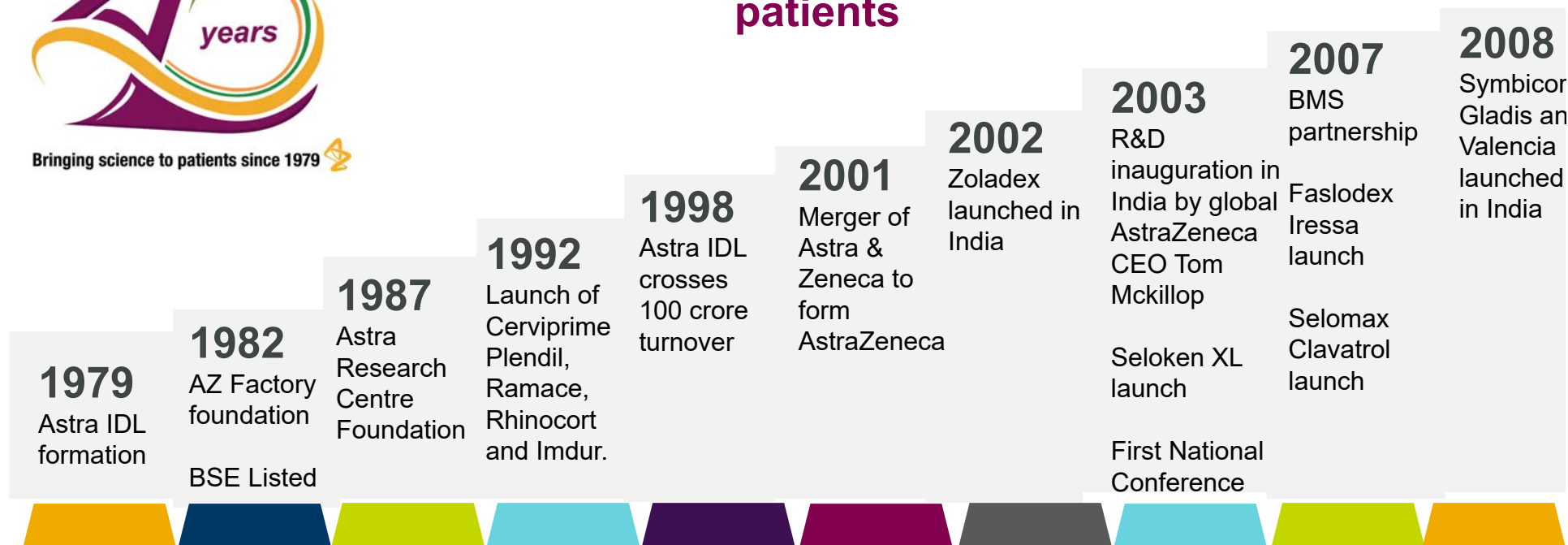
## AstraZeneca Pharma India Ltd FY 2017-2018







## 4 decades of bringing science to patients



Clear daily  
**Imdur**  
budesonide formoterol inhaler

**Zoladex**  
SafeSystem™

ONCE-A-DAY  
**Seloken XL**  
bupropion hydrochloride tablets 150/100mg

**FASLODEX**  
Faslodex 250 mg capsules

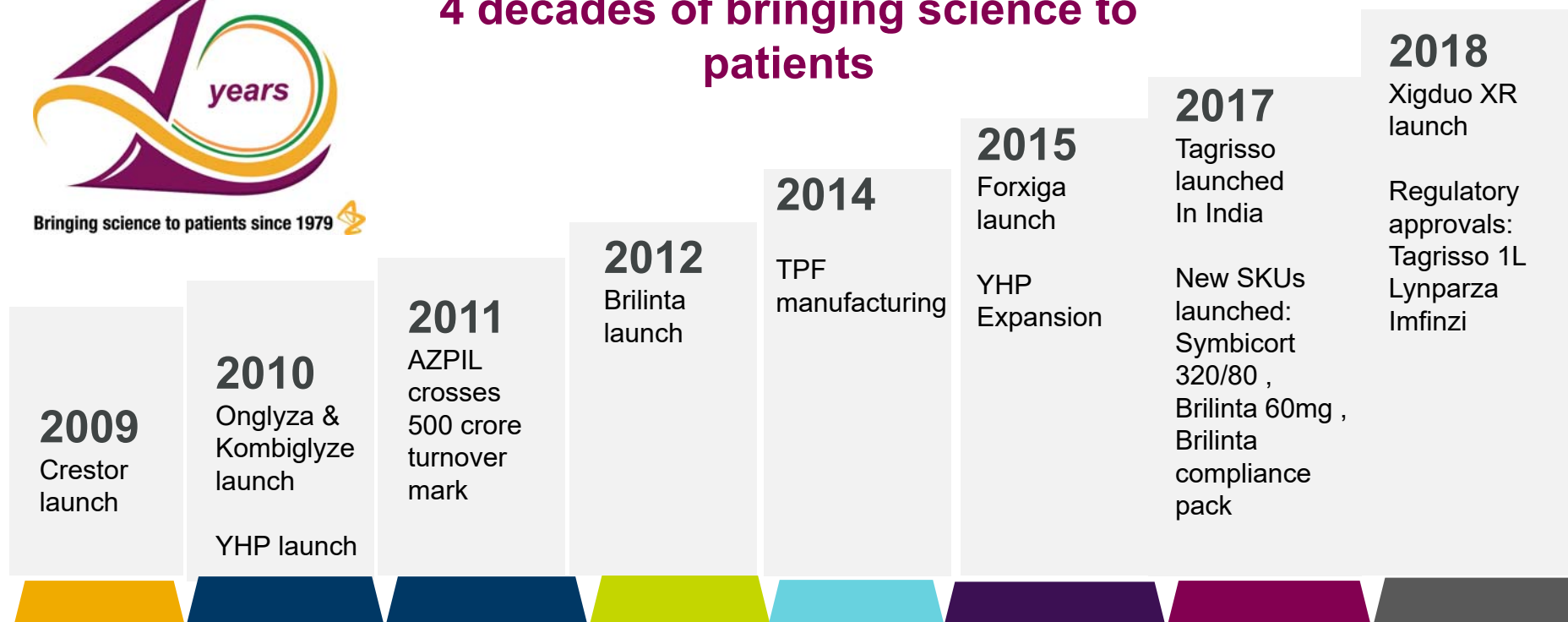
**Symbicort**  
budesonide/Formoterol



Source: Internal data



## 4 decades of bringing science to patients



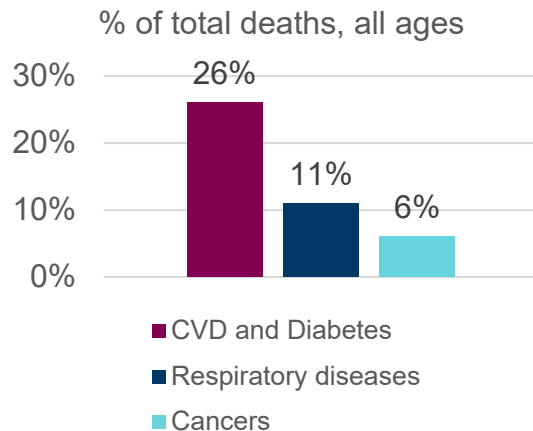
Source: Internal data

## AZPIL is uniquely positioned to address the unmet need in India

43% of all deaths in India are due to Cardiovascular, Diabetes, Respiratory disease and Cancer

### Share of NCDs in mortality in India

%



169 m hypertensive patients

65 m diabetics patients (Will become ~ 109 m by 2035  
(IDF\* estimates)

80 m CKD patients

~3 m cardiac related deaths per year

>1 m new cancer cases diagnosed every year

45 m asthma / COPD patients

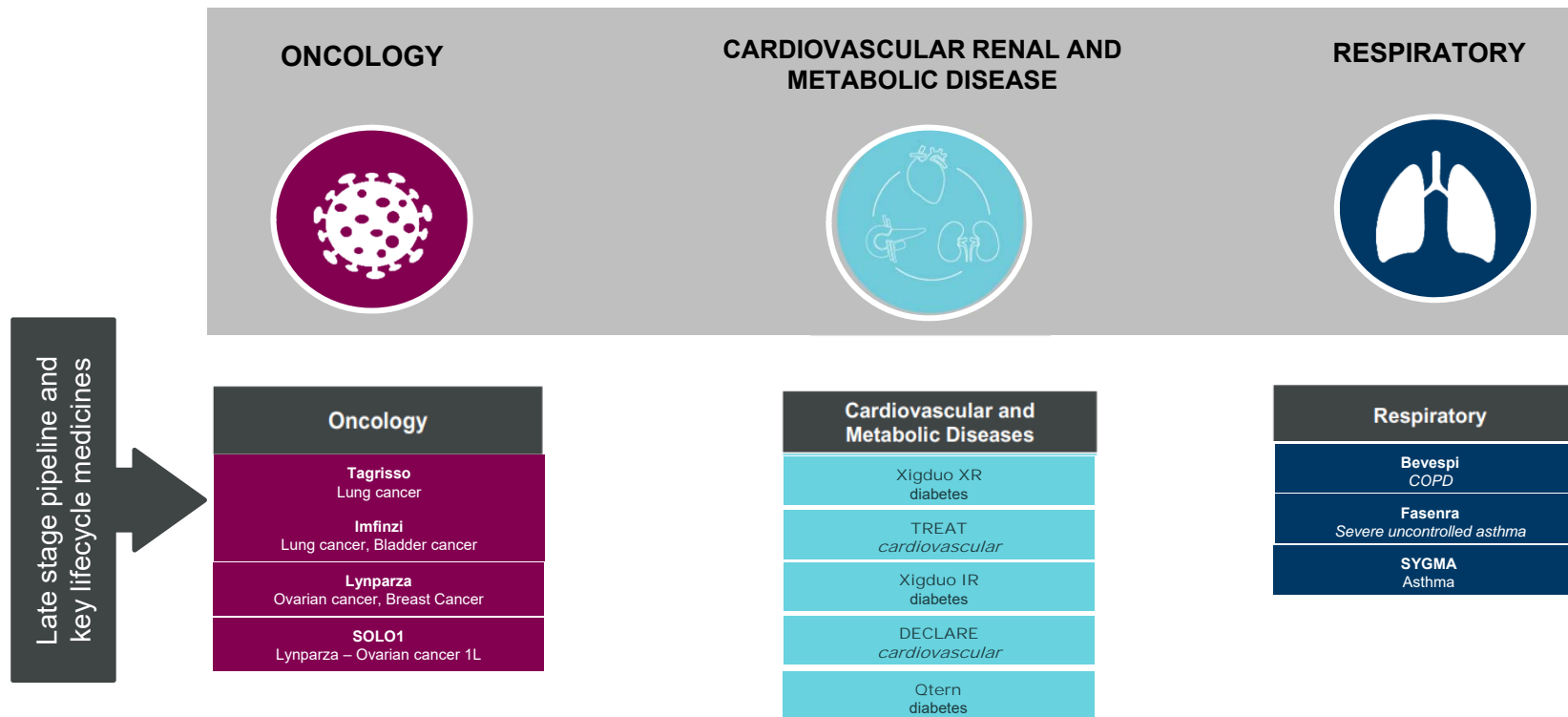
The probability of an Indian getting a heart attack is **4 times** greater than an American, **7 times** greater than a Chinese and **20 times** higher than a Japanese

Source: WHO, IDF, IMS Market Prognosis 2010-14, GLOBOCAN 2012  
Derived from AK Singh 2013 prevalence of 17.3% extrapolated to 35yr age group above

ABBR: IDF – International Diabetes Federation ;  
COPD – Chronic Obstructive Pulmonary Disease ; HIV – Human Immunodeficiency Virus CKD: Chronic Kidney Disease



## Committed to impacting patient lives with upcoming launches\*



1. Lifecycle development programme.
2. Under regulatory review in major jurisdiction.

Launches in India are subject to market potential. Regulatory approval and commercial viability



## AstraZeneca ranks 8<sup>th</sup> and is amongst the fastest growing MNCs in IPM<sup>1</sup>

Rank	Company	In market Val (Cr)	MS%	GR%
	IPM	123762	100	7.8
1	Abbott	7791	6.30	11.1
2	Glaxo	3666	2.96	8.0
3	Pfizer	2948	2.38	-1.8
4	Sanofi India	2736	2.21	6.4
5	Novartis	1371	1.11	5.4
6	MSD	997	0.81	6.0
7	Merck	699	0.56	4.0
8	AstraZeneca	646	0.52	35.7
9	Janssen	500	0.40	8.4
10	Allergan	477	0.39	18.9
11	Boehringer Ingelheim	459	0.37	17.3

**Brilinta in Top 100 Products of IPM<sup>2</sup>**

**Forxiga in Top 200 Products of IPM<sup>2</sup>**

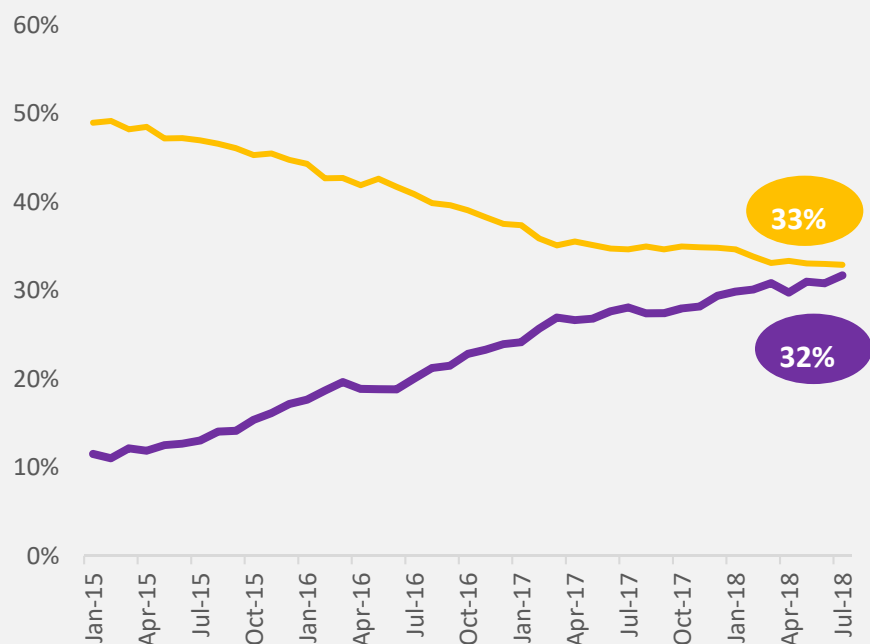
**Symbicort is one of the fastest growing brands in ICS/LABA market<sup>2</sup>**





## Reaching out to more patients in Oral Antiplatelet market

*TICAGRELOR is the fastest growing OAP, molecule reaching 32% MS\*\**



*Innovative Initiatives helping us to achieve key internal Milestones*

> **Compliance Pack**  
helping to address adherence, Accessibility & affordability to activate  
**Duration (+15 Days)**



> An Innovative **Red-DoT** campaign launched to improve Adherence ; gaining wide acceptance amongst HCPs/Hospitals



- > **60%( ~85%#)** STEMI Penetration
- > **# No 3** in Volume Globally
- > **# No 9** in Value Globally

# Dapagliflozin franchise on a high growth trajectory



**2015**

- 19 May 2015 - **Forxiga launch** in India

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**2016**

- Best launch** in IPM
- AWACS Marketing excellence award** – New introduction category
- AA Brand of the Year**

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**2017**

- AWACS Marketing excellence award** – Chronic and Sub-chronic category
- Entry in **Top 200 brands** in IMS

Celebrating

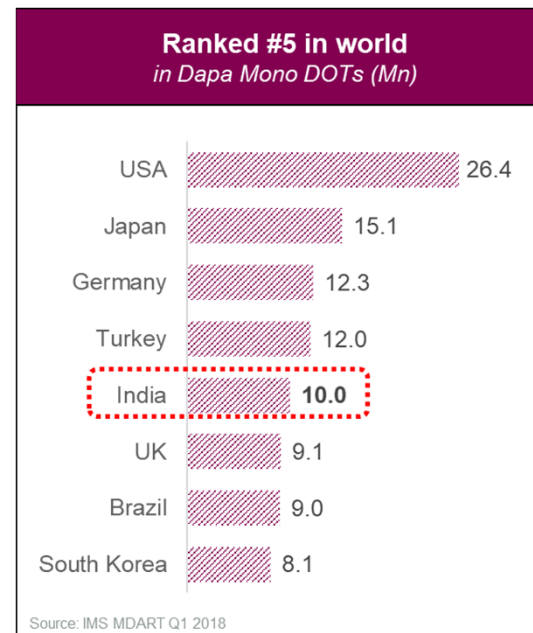
## 3 years

of improved T2D patient treatment outcomes

## in India

**2018**

- Gaining ranks with current standing of **Rank #158** (Source -IQVIA MAT Apr '18 Rank)



**More than 25k patients since launch**

**Exceeded previous benchmarks of Fixed dose combination launches in innovative OAD space**



# Tagrisso has touched >260 patient lives touched since launch ; Gearing up to benefit more patients with 1L indication

## Levers that played a role



A strong pre-launch  
with achievement  
Of 100% of pre-  
launch KPIs



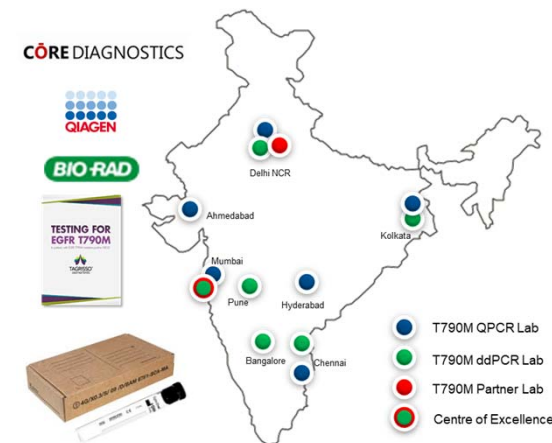
Focus on  
reimbursed  
channels



Scientific knowledge exchange  
and laboratory capability  
building drives up T790M  
positivity



Strategic partnership to increase T790M testing  
network





## Addressing events impacting IPM

### EVENTS

**GST**

**Uniform Code for  
Pharmaceuticals  
Marketing Practices**

**Price controls**

**Ban on Irrational Fixed  
dose combinations (FDC)**

**Lack of infrastructure in  
rural India**

### AZPIL INITIATIVES

**AZPIL was well prepared ahead of GST implementation**

**Company has already implemented the same and is well positioned for roll out of code**

**AZPIL has a greater dependency on patented products.  
Has been complying with all mandated price controls  
within non-patented portfolio**

**The company discontinued Mits Linctus on notification of  
the ban.  
All existing FDCs are backed by clinical trials**

**AZPIL is working on partnering with the government to  
improve NCD diagnosis and treatment**

## Committed to fighting NCDs

## AZ to be the *Trusted Partner* of *Gol* in the fight against NCDs

### Young Health Programme

Program which focuses on primary prevention common NCDs, targeting risk behaviours, and providing youth with a voice.  
Programme in its 8<sup>th</sup> year- has reached out to >255k adolescents and >140k members of the wider community

### Healthy Lung

### Diabetes in Action Policy Initiative

60%

is the burden of Non-communicable diseases in India, as per MOHFW

Nov'17:  
Meeting with Maharashtra CM at  
Make in India, Sweden



Dec' 17  
Meeting with CEO, Niti Aayog



Jan'18:  
Meeting with Assam Chief Minister



Apr'18:  
joint declaration on innovation partnerships for  
a sustainable future between Sweden and India.



## AZ as a trusted partner in providing innovative healthcare delivery solutions

### EARLY ACTION IN DIABETES

MoU with the Department of Health & Family Welfare Kerala to set up a 360° Centre of Excellence for Management of Diabetes and associated metabolic diseases at Government General Hospital, Ernakulam

### HEALTHY LUNG

- Letter of intent with ESIC Ranchi Model hospital for setting up an Uncontrolled Asthma Service.
- Partnership with Bangalore Traffic Department during World Asthma Day May 2018



## Community service

## Making a meaningful difference to the community



### COMMUNITY DAY - MARCH 2018

- Over **10,000** people reached in 4 urban slum communities
- **923** screened for diabetes, hypertension and respiratory diseases





## One AstraZeneca Week - August 2018



### National Community Service Program

- Focus on prevention of **NCDs** and **young people**
- Impact **3,000+ young people** in a nation-wide NCD Sensitation in schools and community outreach programme



# Summary

1. Growing healthcare and pharma market is fueling the company's growth

2. AstraZeneca's portfolio is well-positioned to address India's growing disease burden in NCDs

3. We expect to impact ~3 million patients in India through our life-changing medicines

4. AstraZeneca continues to outperform the market on the back of strong innovative product launches such as Brilinta , Forxiga & Tagrisso





**Making a difference by  
touching lives of patients**