

# Competitive Research Study: Medical/Pharmaceutic al Delivery Models in India

This report offers strategic insights into the medical and pharmaceutical delivery market in India, focusing on Hyderabad. We analyse operational landscapes, business models, pricing, market positioning, and regulatory environments of key players in this rapidly evolving sector.



# Key Players in Focus

Our research covers major national and regional players, delving into their delivery mechanisms, service offerings, pricing structures, and unique selling propositions.



## Tata 1mg

Comprehensive healthcare platform.



## NetMeds

Focus on accessibility and affordability.



## Apollo Pharmacy

Largest pharmacy chain with omni-channel presence.



## PharmEasy

Leading online healthcare aggregator.



## MedPlus

Extensive physical store network.



## Amazon Pharmacy

Leverages Amazon's vast infrastructure.



## HealthKart

Specialises in health and nutrition products.



## Zeno Health

Focus on affordable generic medicines.

# Comparative Analysis: Delivery & Logistics

|                 |                              |                                     |                               |                     |
|-----------------|------------------------------|-------------------------------------|-------------------------------|---------------------|
| Tata 1mg        | 24-48 hours                  | ₹500-₹700                           | Varies, often free above MOV  | Hybrid              |
| NetMeds         | 24-48 hours                  | ₹1000 (non-members), ₹500 (members) | Varies, often free above MOV  | Hybrid              |
| Apollo Pharmacy | 1-48 hours                   | ₹199                                | Free above ₹199               | Hybrid              |
| PharmEasy       | Same day-48 hours            | ₹499 (members), ₹1000 (non-members) | Varies, often free above MOV  | Hybrid              |
| MedPlus         | 6-24 hours                   | Not explicitly stated               | Not explicitly stated         | Hybrid              |
| Amazon Pharmacy | Same-day                     | ₹149 (Prime), ₹299 (non-Prime)      | Free above MOV                | Amazon's network    |
| HealthKart      | 2-3 working days             | ₹500                                | ₹50 for orders less than ₹500 | Third-party vendors |
| Zeno Health     | Claims fastest (50-min goal) | No minimum                          | No delivery fee               | Retail network      |

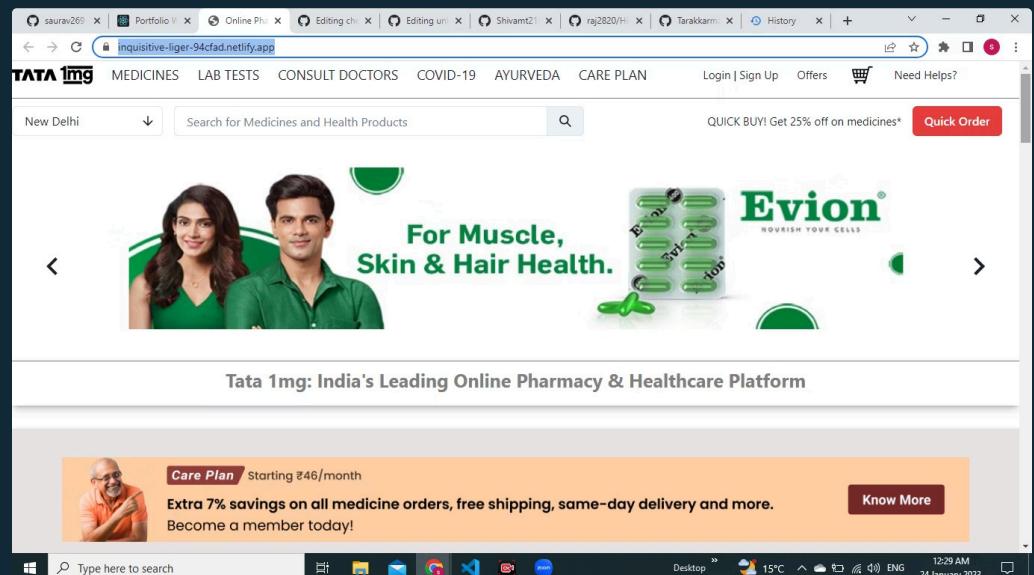
# Tata 1mg: Integrated Healthcare

## Business Model

Hybrid logistics (own fleet, third-party, local pharmacies) for 24-48 hour standard delivery. Focus on e-pharmacy, e-diagnostics, and e-consultation.

## Pricing & Positioning

Consistent pricing, 'Care Plans' for loyalty. Positioned as a trusted brand, emphasizing authenticity and quality. Strong digital marketing and product bundling.



# NetMeds & Apollo Pharmacy: Accessibility & Trust

## NetMeds

Acquired by Reliance Retail, focuses on accessibility and affordability. Hybrid delivery, 24-48 hours. Competitive pricing, 'NMS SuperCash' loyalty program. Positions as affordable and reliable.

The screenshot shows the NetMeds website homepage. At the top, there's a teal header with the NetMeds logo, a search bar, a cart icon (0 items), and a login/signup button. Below the header, there are five main categories: Medicine, Wellness, Lab Tests, Beauty, and Health Corner. A navigation bar below these includes links for Covid Essentials, Diabetes, Eyewear, Ayush, Ayurvedic, Homeopathy, Fitness, Mom & Baby, Devides, Surgical, Sexual Wellness, and Treatments. The main content area is titled "All Products 30" and displays a grid of eight product cards. Each card includes a small image of the product, a discount offer (e.g., 30% OFF, 14% OFF, 10% OFF), the product name, the manufacturer, the best price, and the original MRP. At the bottom of each card is a teal "ADD TO CART" button.

## Apollo Pharmacy

India's largest pharmacy chain, omni-channel approach. Rapid delivery (1 hour possible) via physical stores. Premium pricing, loyalty programs. Emphasizes trust, convenience, and comprehensive solutions.



# PharmEasy & MedPlus: Convenience & Affordability

## PharmEasy

Leading online healthcare aggregator. Hybrid logistics, same-day delivery in some areas. Aggressive discounts, 'PharmEasy Plus' membership. Positions as cost-effective and convenient.



## MedPlus

Prominent retail chain with growing online presence. Hybrid model, 2-hour delivery in select micro-markets. Aggressive upfront discounts, focus on private labels. Second-largest pharmacy chain in India.



# Amazon Pharmacy & Zeno Health: Disruption & Generics

## Amazon Pharmacy

Leverages Amazon's infrastructure for same-day delivery. Transparent pricing, Prime member benefits. Disrupts market with convenience and integration into Amazon ecosystem.



## Zeno Health

Focuses on affordable generic medicines. Omni-channel model, 50-minute delivery goal. Deep discounts (up to 80%) by direct sourcing. Positions as champion of affordable healthcare.



# Hyderabad Market: Key Observations



## Hybrid Models Dominate

Most players combine online platforms with physical infrastructure for wide coverage and efficient last-mile delivery.



## Speed as a Differentiator

Companies promote faster delivery (same-day, 1-2 hours), intensifying competition and demand for quick access.



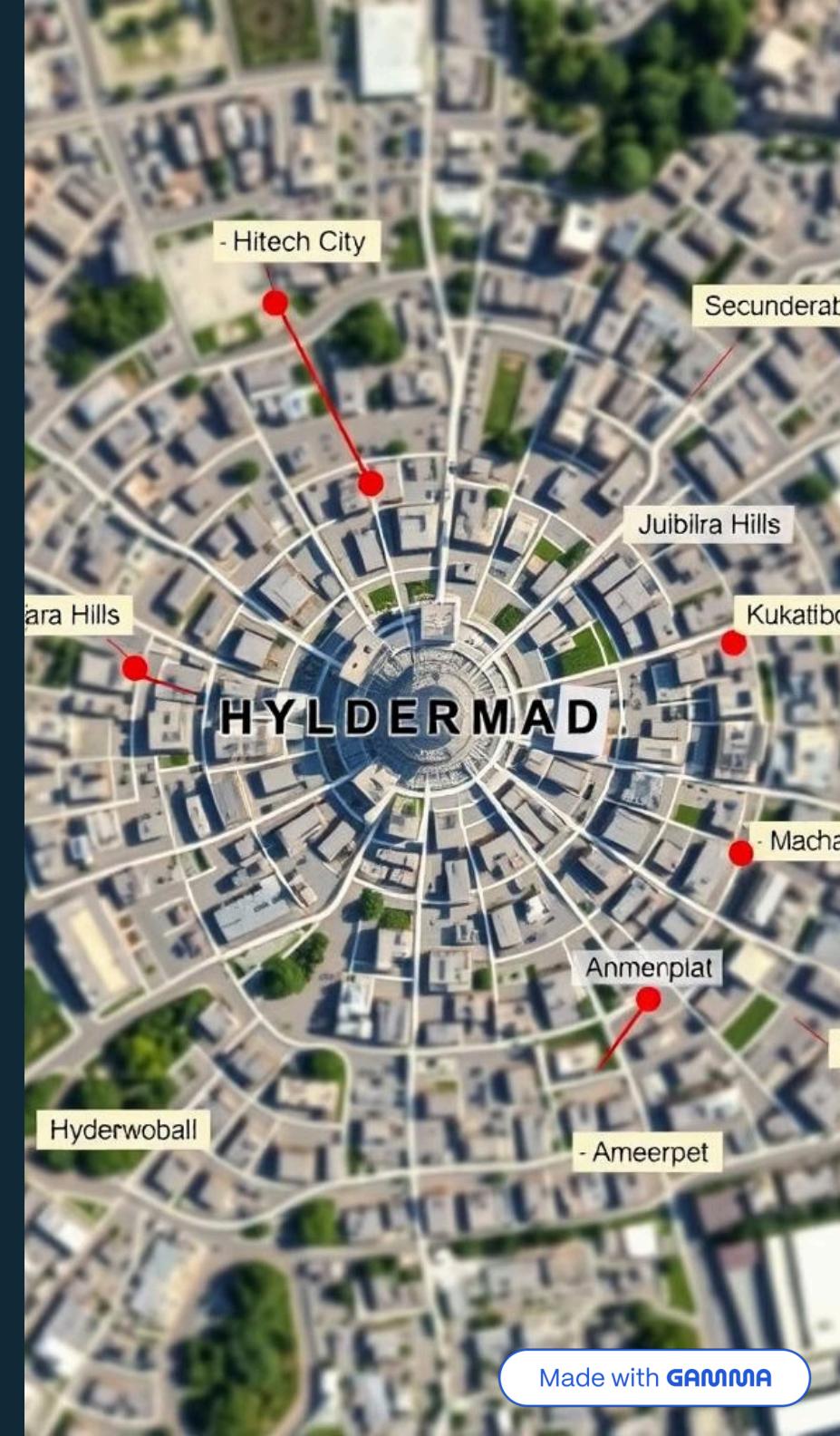
## Physical Presence Advantage

Players with strong retail footprints (Apollo, MedPlus) have an edge in localized delivery and customer trust.



## Quick Commerce Integration

Trend towards ultra-fast delivery (e.g., HealthKart with Zepto) influences customer expectations.



# Strategic Implications & Conclusion



## Niche Focus

New entrants should target specific niches or offer differentiated value.

## Leverage Technology

Invest in AI/ML for inventory, route optimization, and customer management.

## Build Trust

Ensure transparent pricing, product authenticity, and reliable delivery.

## Adapt to Regulations

Proactively engage with evolving legal requirements for compliance.

## Consider Hybrid Models

Integrate physical touchpoints for enhanced customer experience and faster delivery.