

India



7th Rank
in Indian
Pharma Market



10%
Five-Year
CAGR



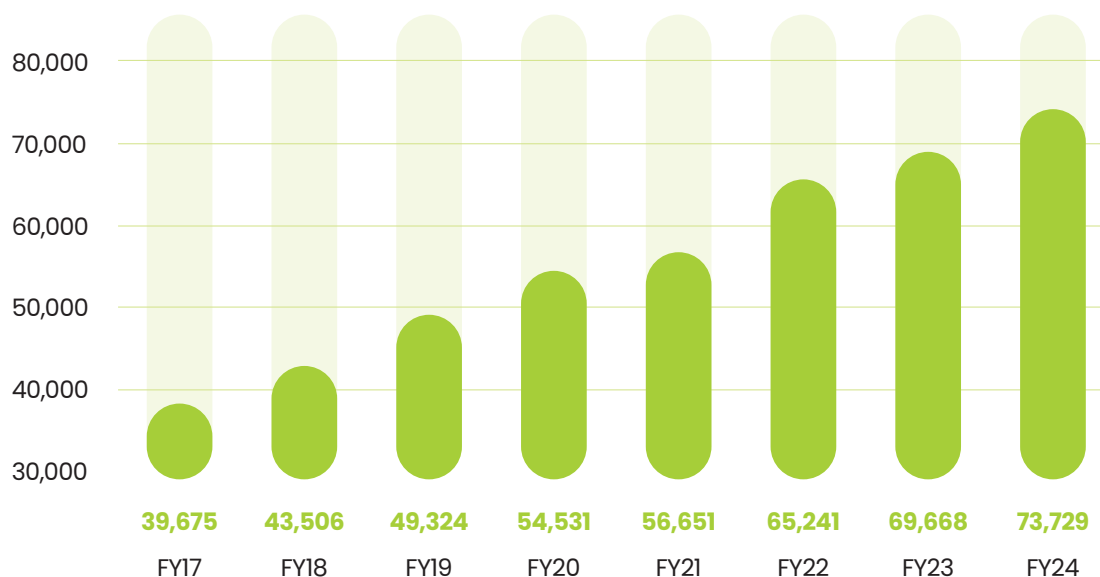
Lupin Brands
Ranks in the Top
300 Brands

Lupin's performance in the Indian pharmaceutical market has consistently been on an upward trajectory, with its India business outperforming the market. This success can be attributed to our strategic expansion into chronic and fast-growing therapies, leading to revenues of INR 73,729 Mn, accounting for 34% of Lupin's total revenue. The company's focus on delivering high-quality and affordable drugs has established it as a

preferred partner for medical practitioners in India. Strong customer engagement has also been a significant factor in strengthening its presence, with Lupin being ranked seventh in the Indian Pharmaceutical Market. In FY24, Lupin's branded generics sales increased by 9.6%, achieving a five-year CAGR of 10.4%, surpassing the market's growth rate of 9.9%. Consequently, our market share increased to 3.4% in FY24.



India Formulation Sales (in INR Mn)*



Lupin's India Region Formulations business primarily focuses on the chronic segment, contributing 59.8% of its total revenue, with Lupin holding the fifth position in the industry. The top five therapy areas in India - Cardiology, anti-diabetes, Respiratory, Gastrointestinal, and anti-infective, collectively account for 73.6% of Lupin's sales. Lupin is a leader in the anti-TB segment and ranks second in the Respiratory segment. The Cardiology and anti-diabetes segments generate approximately INR 16,000 Mn and INR 15,000 Mn, respectively, and Lupin ranks third in both these growing areas. The Respiratory therapy segment has surpassed INR 10,000 Mn, and the

Gastro+Hepato therapy segment has moved upto INR 7,000 Mn.

In the Respiratory segment, we launched the world's first Fixed Dose Triple Combination drug, Vilfuro-G, for managing Chronic Obstructive Pulmonary Disease, a leading cause of death and disability. Approved as a Dry Powder Inhaler by the Drug Controller General of India, this innovative therapy brings hope to over 37 Mn COPD patients in India. This milestone underscores our commitment to expanding our respiratory portfolio and providing essential healthcare solutions to transform lives.

*Source: IQVIA Report

Our Brands in the Top 300 Brands Category of the IPM

Gluconorm-G

Budamate

Huminsulin

Ivabrad

Rablet-D

In the anti-diabetes segment, Lupin experienced a steady growth rate of 5.1%, while the Cardiology segment achieved a growth rate of 13.4%, outperforming the market growth rate of 10.0%. In the Respiratory segment too, Lupin's growth rate of 13.8% was significantly higher than the market growth rate of 2.7%.

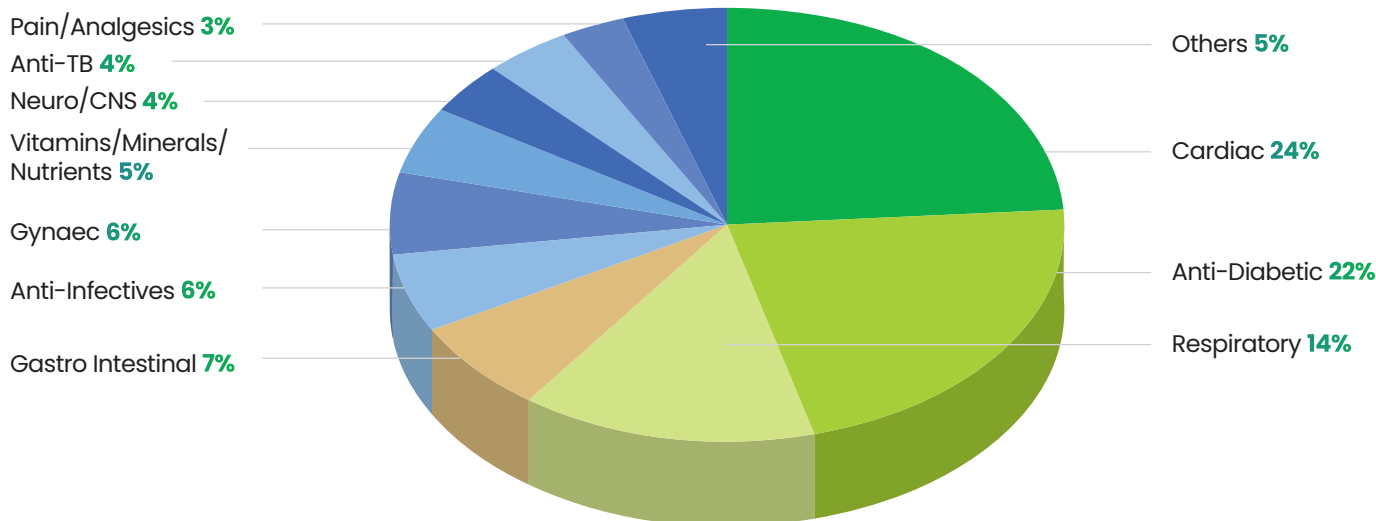
Lupin's unwavering commitment to fostering more robust connections with medical practitioners and driving better patient outcomes is evident through its

proactive initiatives. The company has also constantly focused on curating unique scientific platforms that facilitate collaboration and partnerships with leading universities worldwide to enhance the expertise of doctors.

By consistently aligning its business strategies with foresight on future market trends and focusing strongly on innovation, Lupin continues to reinforce its position as a leading player in the Indian pharmaceutical market.

Therapy-wise Market Share

Therapy	Rank	Market Share
Anti-TB	1	60.7% (2.0%)
Anti-Diabetic	3	7.8% (-0.4%)
Cardiology	3	6.1% (-0.1%)
Respiratory	2	6.1% (0.3%)
Gynecology	9	3.7% (0%)
Neuro/CNS	6	2.7% (-0.1%)
Gastrointestinal	10	2.8% (0%)



Patient Support Programs

NovaShakti

NovaShakti empowers women against heart disease through awareness, diagnosis, and care, engaging over 50,000 patients and 7,000 healthcare professionals. Through an association with Olympian MC Mary Kom, NovaShakti promotes heart health through educational screening. A strong social media presence has helped in reaching out to a large segment of women and creating awareness.



JEET

Jeet is a reward-based Patient support Program that improves heart health through Awareness, Adherence, and Assistance. It encourages healthy habits through medication reminders and health quizzes. Jeet, recommended by healthcare practitioners, has empowered a number of patients and practitioners and will continue to focus on reaching out to many more.



Joint Airways Initiative

JAI is India's first digital asthma educator platform, aiding nearly 38 Mn asthma patients with the right way to use inhalers. Over 12,000 patients have enrolled in the last year.



Humrahi

Humrahi is a leading patient support program for diabetes management, offering services in 12 languages, including a chatbot, tracking tools, counseling, and complimentary tests. Humrahi onboarded over 11,862 patients in the last year, who were supported through educational camps and screenings.



Say Yes to Life

SAARTHI is a support program for mental health professionals and patients, available in multiple regional languages. The platform improves treatment outcomes and offers coping strategies for mental health issues such as anxiety and stress, enabling open discussions with psychiatrists.



AI Screening for Breast Cancer

Niramai's Thermalytix™ uses AI for early breast cancer detection, significantly improving accuracy over traditional methods. Lupin has partnered with Niramai and conducted over 90 screening camps in the past year.



Prothsahan

Prothsahan promotes breast cancer awareness through educational initiatives and partnerships with public figures and medical experts. Interactive sessions with various sections of the community have been able to help with education on symptoms and early detection.



Leveraging Digital

In its efforts to drive positive patient health outcomes globally, Lupin has been at the forefront of leveraging innovative digital strategies to enhance customer engagement. Multichannel initiatives, such as Lupin Konnect and DigiEngage, enable seamless interaction with our core doctors through digital and telecommunication channels, in addition to traditional face-to-face engagements. Through evidence-based practices and clinical guidelines, doctors have access to updates on therapeutic breakthroughs and treatment methods, helping them deliver optimal patient care to improve lives.

Lupin Konnect plays a vital role in enhancing brand awareness among untapped General Practitioners. Through our omni-channel engagements, GPs are constantly kept abreast of the latest scientific updates, specifically tailored to the core Lupin brands. This targeted outreach allows us to build stronger relationships with them and improve brand recall.

Furthermore, we have implemented SmartRep, which is specifically designed for our field force and serves as a comprehensive analytics platform to obtain actionable insights. This platform is fully operational across all divisions within India Region Formulations, seamlessly integrating various resources such as sales performance metrics, coaching modules, a knowledge hub, chemist data, and more. This seamless integration empowers our teams with the necessary tools to provide exceptional service and support to healthcare professionals.

Currently, our adoption rate stands at an impressive 97%, highlighting the effectiveness of this platform in enhancing our field force's capabilities. Going forward, we will enhance our efforts through AI and Machine Learning based insight programs, to further support our field force.

Lupin Gurukul is a centralized repository for brand plans and marketing collateral, providing easy access and reference for our team members. This platform enhances efficiencies, reduces approval time and enables team members to make informed decisions.

Additionally, we have developed Anya, an AI-powered chatbot that delivers medically verified responses and provides valuable insights. Anya is available in 6 languages and covers a wide range of therapy areas, including Cardiology, Diabetes, Respiratory, Dermatology, Tuberculosis, Urology, Orthopaedics, and more. With over 32 lakh queries successfully addressed, Anya has assisted over 5 lakh+ users with not just text responses but infographics as well.

Our dedication to digital engagement is exemplified by our active presence on social media platforms to connect with our audience for positive outcomes. Lupin India has witnessed a remarkable 16% increase in followers, and the Shaping Health platform has seen a notable 10% rise compared to the previous year.

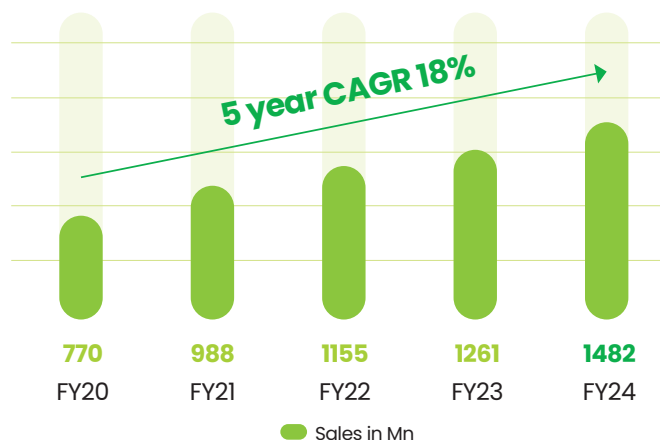
As we continue to grow our online community, we are committed to delivering relevant and informative content that resonates with our followers and reinforces our position as a leader in the digital space.



LupinLife

LupinLife Consumer Healthcare, our OTC business, has achieved remarkable growth since its inception in 2017, expanding into multiple categories, including gastro, health supplements, women's health, and pain management. With a 5-year CAGR outpacing the OTC category, our flagship brand, Softovac®, leads the bulk laxative segment with a 44% market share. Following its transition to a consumer healthcare brand, Aptivate® has carved a niche in child healthcare, demonstrating strong performance. We run innovative engagement programs such as the Aptivate Achhi Bhook Quiz and Aptivate Run.

Strategic brands such as Vimpro and Vovilup strengthen our portfolio, which is supported by an agile retail network and digital marketing strategies. LupinLife continues to grow at 2x the OTC category, achieving an 18% CAGR since FY20, reflecting our commitment to consumer relevance and operational excellence, aided by a robust retail network, digital marketing strategies, and sales force automation.





ATHARV ABILITY

A LUPIN INITIATIVE

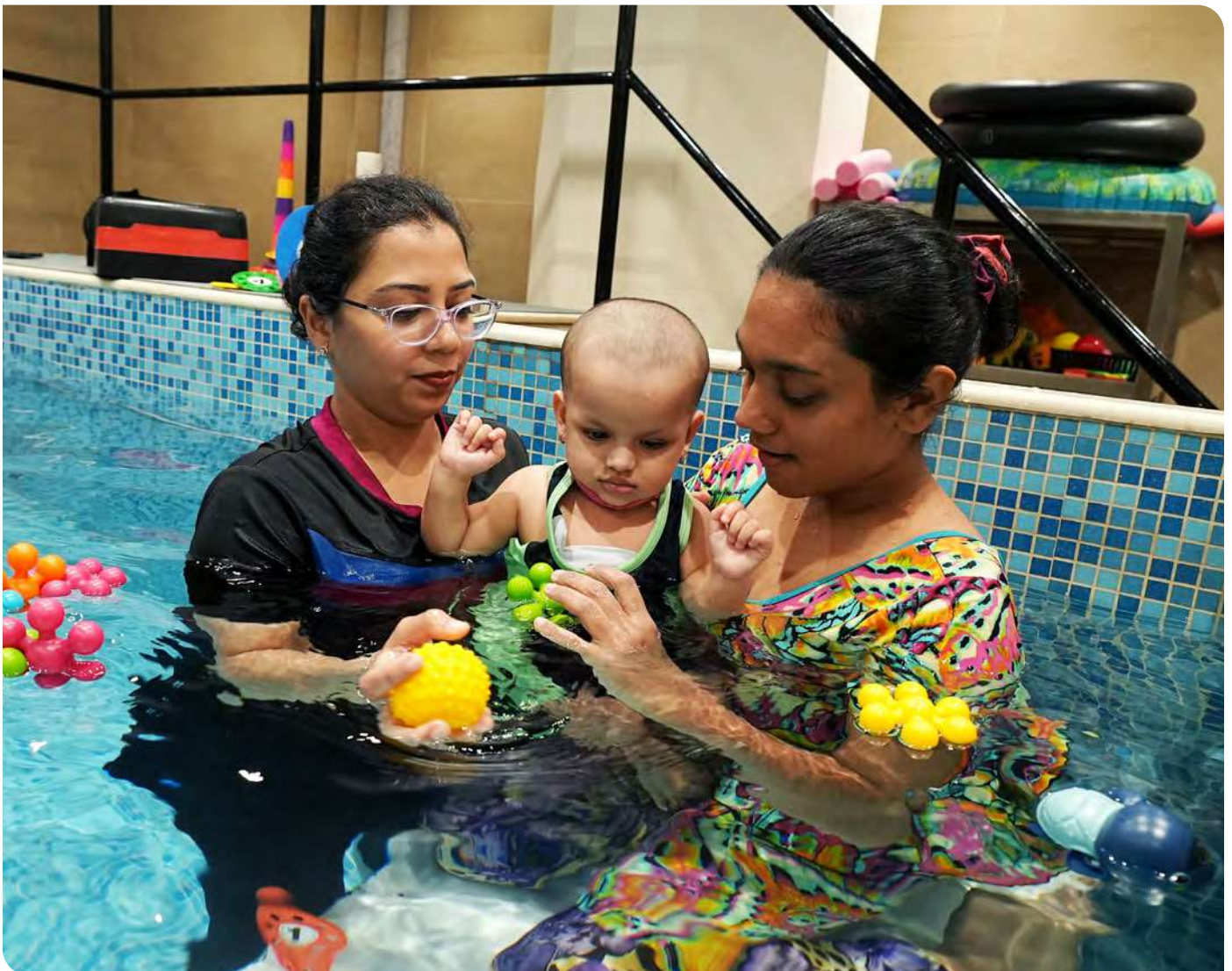
ABILITY • DIGNITY • LIFE

Atharv Ability

Atharv Ability, Lupin's first Neurological Rehabilitation Center, serves as a cutting-edge outpatient facility for both adults and children, and addresses the crucial need for neurorehabilitation in India. Research highlights that multidisciplinary rehabilitation can enhance functional recovery by 30-40% and improve the quality of life for patients. The center specializes in treating post-stroke, traumatic brain injury, spinal cord injury, and various other neurological conditions, including Parkinson's, cerebral palsy, and multiple sclerosis.

Offering a wide range of treatments under one roof, Atharv Ability's services include neuro physiotherapy, advanced robotics therapy, speech and language therapy, occupational therapy, cognitive therapy, aqua therapy, pain management, spine rehabilitation, and pediatric neurological rehabilitation. In FY24, Atharv Ability treated over 2,400 patients and conducted nearly 30,000 treatment sessions, including 10,000+ physiotherapy sessions, 2,200+ robotics therapy sessions, and 1,800 aqua therapy sessions.

Since its launch, Atharv Ability has meaningfully touched the lives of over 5,000 patients, exemplifying our commitment to enhancing the lives of those with neurological disabilities, ensuring they regain their abilities and reintegrate into society.





Outlook

Lupin's India business continues to move forward and sharpen its focus on chronic and high-growth therapy areas, leveraging its strong market position and expanding its portfolio of high-quality, affordable drugs. By continuing to foster strong relationships with doctors, patients, distribution channels and consumers, and leveraging its digital platforms, Lupin aims to enhance its customer engagement and support.

Our digital initiatives will be further enhanced with the integration of advanced technologies such as AI and machine learning to provide actionable insights and optimize performance. Additionally, we will continue to expand our digital marketing efforts to strengthen our brand presence and reach a broader audience. Our commitment to innovation and excellence will ensure that Lupin remains at the forefront, driving positive health outcomes and delivering value to our stakeholders.