



Brand Biocon

At the Intersection of Patient + Therapy





+++++++ Biocon has established itself as an emerging **global biopharmaceutical innovator** in just over a decade. Strategically leveraging a **portfolio approach** focused on **chronic disease segments** and integrating well validated target-to-clinic-to-counter capabilities, we have built considerable brand equity and are on the path to delivering affordable innovation.

+++++++ Within a short span of time, we have brought to market an impressive portfolio of medically vital products. Our growing ability to offer **affordable and differentiated medicines** positions us at the challenging intersection of patient and therapy.







Biocon's comprehensive range of branded products in key disease segments

2011

BRAND BIOCON

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The second largest in volume, 12th in value and by 2015, a USD 20 billion* market potential – India is forecast to be among the top 10 pharma destinations of the world.

This robust growth has been fueled by increased purchasing power, access to better healthcare, wider adoption of international GCP/GMP norms, an improving IP and regulatory landscape, growing investment in health sector infrastructure, and rapidly developing R&D expertise and funding.

Strategically positioned in this expanding market is Biocon. With a tailwind of twelve years in biopharmaceuticals and a flexible yet well balanced biopharma strategy, we are committed to factoring 'more for less' into all our offerings. Biocon's affordable innovation platform, dovetailed with world class capabilities along the drug value chain has enabled the Company's successful foray into the branded formulations market.

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Biocon's Brandfolio targets chronic diseases from diabetes, cancer, end-stage renal illnesses to immune disorders and other life-threatening conditions. Marketed primarily in India, parts of Asia, Latin America, Middle East and Africa, we offer our products to healthcare providers, including physicians, clinics, hospitals and pharmacies. Significantly, we market proprietary molecules and conduct critical clinical trials in therapeutic areas, such as locally advanced head and neck cancers, cervical cancers, brain tumors, etc. that are a huge unmet need in the Global patient population. Beyond therapy, Biocon supports select products with patient friendly initiatives in disease awareness, prevention and management. We also assist healthcare professionals and patients with the treatment of complex medical conditions.

To successfully penetrate the Indian branded formulations market, Biocon recognizes the important synergies derived from research and marketing partnerships. We believe, collaborative innovation will accelerate our pace of development, while marketing alliances will help extend our reach into local

geographies. We also aim to leverage partnerships to capture emerging opportunities in biosimilars. In the next 3 to 10 years, as a number of patents expire, Biocon will harness its India advantage to generate these technologically feasible and economically imperative alternatives to expensive biologics.

Today, sales from branded formulations (both injectables and oral dosages) account for a sizeable portion of Biocon's revenues. Our products are already among the top ten brands in their respective verticals of oncology, cardiology, nephrology and diabetology. Going forward, we aim to step up our presence in the domestic market by aggressively launching more medicines and thereby, increasing the contribution of our brandfolio to more than 25% of total revenues. In achieving this business target, we aim to accomplish a far more significant goal: making better therapies available and accessible to patients in India and eventually the world.

DIABETOLOGY

The spread of diabetes has reached alarming proportions with developing countries bearing the brunt of this epidemic in the 21st century. By next year, India will be home to over 50 million diabetics, making it the world's diabetes capital. By 2030, that number will hit a staggering 87 million, effecting nearly 8% of the country's adult population*.

The Market Opportunity

- + World's largest diabetes patient pool
- + Success of newly launched drugs
- + Increasing diagnosis and drug treated rates
- + A rapidly growing market

In 2010, total sales of insulin and oral anti-diabetics in India reached INR 28 billion, of which, the market for oral anti-diabetics was worth INR 17 billion**. With the number of diabetics increasing, the market, over the next five years, will be driven by the strong uptake of insulin analogs.



Milestones

- + Biocon Diabetology is ranked 12th in its represented market in India
- + Insugen[®] has more than 10% market share in India
- + Insugen[®] is now available in Latin America, Middle East, Asia and North Africa
- + Insugen[®] 100 IU was launched in December 2010

Affordability Index

(as compared to the leading brand in that category)

Insugen[®] ~20%
BASALOG[®] ~40%

Marketed Products

Insugen[®] 30/70 100 IU
Insugen[®] 50/50 100 IU
Insugen[®] N 100 IU
Insugen[®] R 100 IU
INSUGEN[®] 30/70 40 IU
INSUGEN[®] 50/50 40 IU
INSUGEN[®] N 40 IU
INSUGEN[®] R 40 IU
BASALOG[®]
BLISTO[®]
BLISTO[®] MF
METADOZE IPR[®]
TriGPM[®]
ZUKER[®] MF
PIODART[®]
PIODART[®] MF
OLISAT[®]
GABIL[®]
GMAB[®] Plus

Insugen[®] is the fastest growing drug in its class in India

Biocon Diabetology

Launched in 2004, this division has successfully introduced into the Indian market a range of oral anti-diabetic drugs, human insulins and insulin analogs. In its portfolio is one block-buster brand and several other high quality, affordable drugs that doctors and patients continue to endorse. In fact, Biocon is the only company, among the 61 players in the anti-diabetes space, to have demonstrated success with both, insulins and oral anti-diabetics.

Winning With Diabetes

This patient friendly initiative has greatly enhanced the reputation of BASALOG[®] by helping diabetics improve the quality of their lives through effective medication and self monitoring. Till date, over 12,500 patients have registered with our helpline and 7,400 Breeze 2 glucometers have been delivered to patients on a complimentary basis.

ABIDE

This medical education forum aims to create an enabling IT-based doctor-patient interface for dissemination of medical information and training modules to diabetics and physicians located in remote regions of India.

Flagship Brands

Insugen[®]

By far the most affordable brand in India, Insugen[®] remains India's most clinically validated r-DNA insulin. Launched 7 years ago, Insugen[®] has brought about a paradigm shift in the insulin market and is today, a leading drug in its class.

BASALOG[®]

The launch of BASALOG[®] in the last fiscal boosted divisional sales, garnering considerable market share in the analog market, hitherto dominated by brands from foreign multinational companies. Today, BASALOG[®] is a formidable player, having successfully allayed apprehension about the acceptance of analog insulin in vials.

* International Diabetes Foundation, 2009
** IMS MAT: Dec 2010

ONCOTHERAPEUTICS

Cancer is one of the 10 leading causes of death in India. No longer considered a disease of developed nations, more than 700,000 new cancer cases are being registered in India per annum. The National Cancer Registry Program data indicates that at any given time, there are about 2.5 million cancer patients in India with approximately 450,000 cancer-related deaths each year.

The Market Opportunity

- + More than 50% increase in breast, ovarian, prostate and head & neck cancer incidence
- + Rising demand for latest tumor-fighting therapies
- + High unmet need – underserved patient population

The market for chemotherapeutic drugs in India is estimated to be worth INR 12 billion based on in-hospital sales of anti-cancer drugs. This market is forecast to grow at a CAGR of 16% over the next 5 years to reach INR 26 billion*.

