The Director's Atlas

Sector Outlook



Market size and valuation

- ~US$27-29 bn, CY2025
- Domestic Indian pharma market at trade prices
- 8.1% growth in 2025

Primary economic engine

Branded generics exports, complex drug manufacturing, affordable chronic therapies and domestic pharmacy expansion.

Boardroom Focus

01 **Strengthen cGMP compliance and data integrity**

02 **Allocate capital to domestic APIs and CDMO capacity**

03 **Expand respiratory and biosimilar platforms**

For Business, Finance and Function Directors:
A starting point for roundtable conversations on growth, resilience and stakeholder alignment.

Transformations Our Programs Deliver

OUR COACH

For Business, Finance and Function Directors

Two outcomes	Foresight to lead through disruption. Influence to align stakeholders before action. Camera confidence, eloquence, vocal gravitas and a six-week peer network.

01 ENTERPRISE RESILIENCE

Foresight → Recognised Strategic Leadership

INSIDE YOUR COMPANY

Be recognised as the director who identifies structural shifts early and turns them into a clear agenda for investment and action.

OUTSIDE YOUR COMPANY

Build a reputation for judgement that clients seek by name, partners trust and competitors benchmark against.

02 STAKEHOLDER ALIGNMENT

Functional Authority → Enterprise-wide Influence

INSIDE YOUR COMPANY

Build a function backed by peers and the C-suite. Articulate ideas with clarity, eloquence and vocal gravitas, with confidence in the room and on camera.

OUTSIDE YOUR COMPANY

Be known for ethical influence and strategic judgement, supported by a trusted peer network built over six weeks.

Five paradigm shifts

What changes the basis of competition

01 Structural

Standalone brands → chronic-therapy consolidation and local API capacity.

02 Technology

Conventional plants → peptide synthesis, digital records and automation.

03 Evidence and trust

Quality certificates → traceable data, testing and inspection evidence.

04 Economics

Price-led growth → complex generics and long-term manufacturing contracts.

05 Socio-cultural

Rising chronic-care needs → demand for affordable, trusted therapies.

FOR YOUR NEXT LEADERSHIP DISCUSSION

Which of these shifts could change your competitive position - and which is missing from your leadership agenda?

Opportunity & Disruption

Where value can move in pharma

01 Market opportunity

Complex inhalation generics, biosimilars, contract research and manufacturing, and API synthesis.

02 Disruption

US FDA inspection scrutiny, imported-API cost volatility and domestic price caps.

03 Sector impact

Compliance failures delay launches; remediation, input costs and price caps compress margins.

04 Strategic response

Build continuous API synthesis, local clinical-trial capabilities and PLI-backed domestic inputs.

Opportunity → Disruption → Impact → Strategic Response

Sector Movement

Signals to fund, reshape or leave behind

EVOLVE

Reshape existing lines

Contract research and manufacturing, complex respiratory generics, biosimilar R&D and local APIs.

SURGE

Scale emerging lines

Inhalation hubs, continuous API synthesis, contract manufacturing and biosimilar platforms.

SHRINK

Reduce exposure

Slow drug distribution, unhedged currency exposure and uncertified manufacturing.

SUNSET

Exit structurally weak models

Low-margin manual plants, non-compliant API units and unhedged raw-material import models.

FOR YOUR NEXT LEADERSHIP DISCUSSION

What should your business fund, reshape or stop - and where does the leadership team disagree?

Governance Agenda

Regulatory and board priorities

01 Regulatory drivers

- CDSCO approvals and US FDA manufacturing standards
- Drug-pricing controls, packaging rules and RBI FX norms
- DPDP controls for patient, clinical and commercial data

02 Board oversight priorities

- Maintain plant quality, data integrity and inspection readiness
- Fund PLI-backed local APIs and complex manufacturing
- Scale biosimilars with strong regulatory and data governance

Director's Future Role

Strategy, finance and operations

Strategy

Prioritise inhalation and biosimilar pipelines; assess pricing, inspection and acquisition risks.

Transformation

Digitise batch records and quality labs with embedded data-integrity controls.

Finance

Improve batch economics and complex-generic margins; hedge imported-input risk.

Risk & Compliance

Audit data integrity, manage price-cap exposure and assure regulatory compliance.

Operations

Run compliant inhaler manufacturing and coordinate reliable API supply.

Supply Chain

Qualify domestic APIs and starting materials; secure inhaler components.

FOR YOUR NEXT LEADERSHIP DISCUSSION

Are strategy, finance and operations working from the same assumptions about growth, investment and risk?

Director's Future Role

Commercial, customer and product

Quality & Excellence

Strengthen quality labs, corrective actions and continuous-process validation.

Business Development

Expand respiratory and complex-generic markets with regulatory and distribution partners.

Sales

Grow pharmacy, hospital, export distribution and contract-manufacturing accounts.

Marketing

Position respiratory therapies around affordability, verified quality and manufacturing standards.

Client Experience

Support adherence, inhaler technique, healthcare professionals and pharmacy service.

Product & Technology

Automate manufacturing and manage inhalation devices, biosimilar launches and filing plans.

Director's Future Role

Data, people and governance

Data & Analytics

Analyse prescriptions, batch yields, quality signals and input-cost scenarios.

Information Security

Secure plant systems, laboratory and clinical data, and formulation intellectual property.

People & Culture

Recruit scientists and equip plant teams for rigorous manufacturing standards.

Learning & Development

Develop scientists and train teams in data integrity, quality and inspection readiness.

Legal

Protect inhalation patents, support inspection responses and govern data privacy.

ESG & Sustainability

Reduce hazardous solvents, enforce plant safety and audit API waste management.

Turn Sector Intelligence into Enterprise Action

For Business, Finance and Function Directors

Which business priority needs clearer direction or stronger support?

EXPLORE ROUNDTABLE THEMES

01 Enterprise Resilience

Turn disruption into growth with a financially grounded resilience roadmap.

02 Enterprise Transformation

Convert strategy into execution, ownership and measurable change.

03 Stakeholder Alignment

Move from functional authority to enterprise-wide influence.

Let others see the capability those closest to you already recognise.

Grow in confidence, express yourself with eloquence, and become more recognised for the value you bring.

REQUEST AN INVITATION

Discuss your priority on WhatsApp

Bring one live business challenge. Let's explore which roundtable is relevant to your priorities.

jatin@ourcoach.in +91 99993 45967