



AstraZeneca Pharma India Limited

46th Annual General Meeting

Praveen Rao Akkinapally
Managing Director

14th August 2025



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AstraZeneca India Listed Entity Board

Board Structure



Ms. Shilpa Divekar Nirula
Chairperson & Non-Executive Independent Director



Ms. Revathy Ashok
Non-Executive Independent Director



Ms. Monica Widhani
Non-Executive Independent Director



Ms. Sylvia Varela
Non-Executive Director, Stakeholders' Relationship Committee Chair



Ms. Hooi Bien Chuah
Non-Executive Director, Corporate Social Responsibility Chair



Mr. Jesus Diaz-Ropero
Non-Executive Director



Mr. Praveen Rao Akkinapally
Managing Director



Ms. Bhavana Agrawal
CFO & Executive Director

Board Committees

- Audit Committee
- Stakeholders' Relationship Committee
- Corporate Social Responsibility Committee

- Nomination & Remuneration Committee
- Share Transfer Committee
- Risk Management Committee





Agenda

- **Global Update**
- **India Update**
- **Oncology**
- **Biopharmaceuticals**
- **Rare Disease**
- **Sustainability Impact**
- **Great Place to Work**





Global Update



OUR **2030** BOLD AMBITION

Our bold aspiration is to be **pioneers in science**, lead in our disease areas, and **transform patient outcomes**

By 2030, we will deliver **20 new medicines**, be a **\$80bn company** and be **carbon negative**

GLOBAL STRATEGIC PRIORITIES



It starts with advancing the right science and technologies...



- ...that becomes the right medicines with the right strategies to maximise patient benefit...



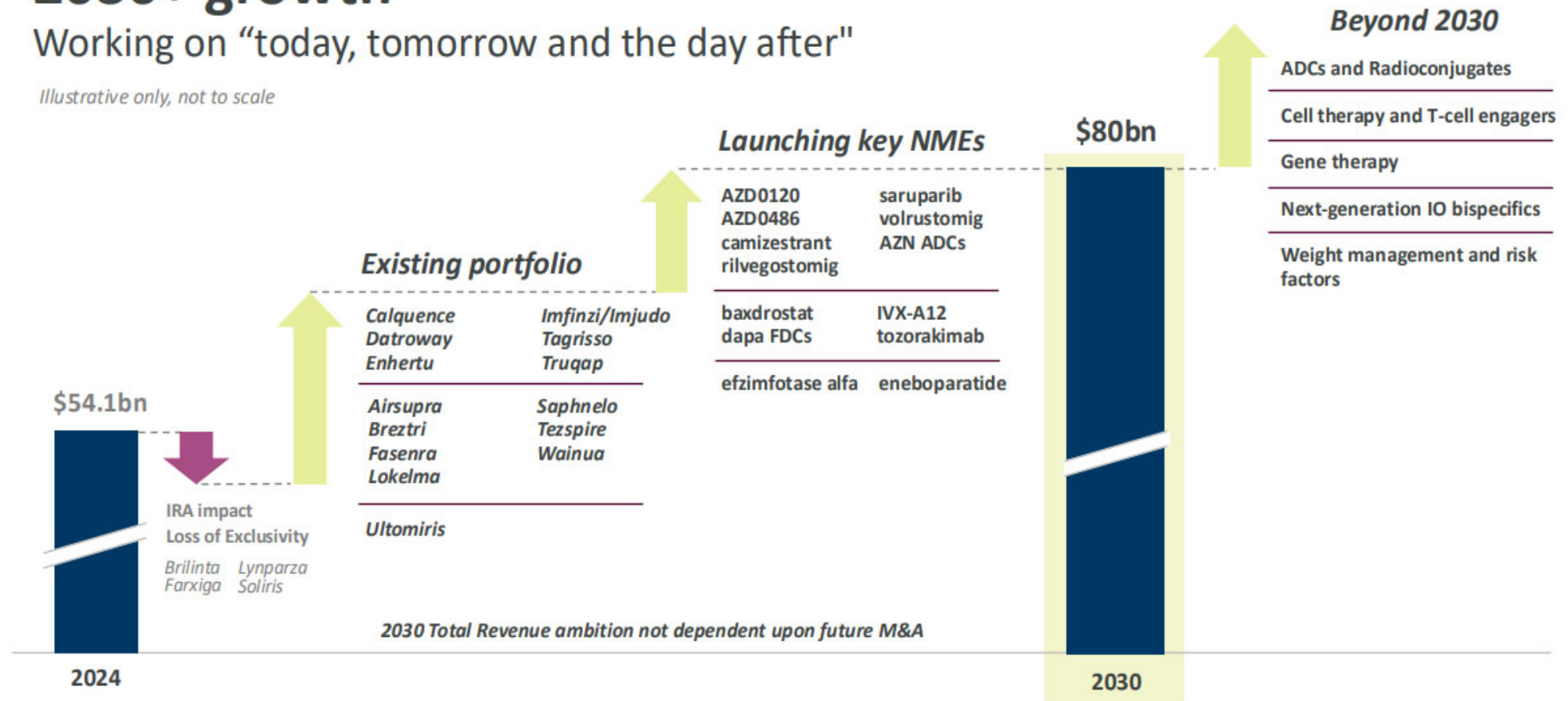
- ...and investing in the right teams, working in the best way, with the right culture



Ambition – \$80bn Total Revenue by 2030 & sustained 2030+ growth

Working on “today, tomorrow and the day after”

Illustrative only, not to scale



5 Note: Ambition to achieve \$80bn in Total Revenue by 2030 is risk-adjusted, based on latest long-range plan. Medicines and assets listed reflect key contributors to 2030 Total Revenue ambition; however, this list is not exhaustive. Medicines and assets listed in alphabetical order and sorted by therapy area. Collaboration partners: Daiichi Sankyo (*Enhertu*, *Datroway*), Amgen (*Tezspire*), Ionis (*Wainua*), Compugen (*rilvegostomig*), Merck & Co., Inc. (*Lynparza*). Appendix: [Glossary](#).

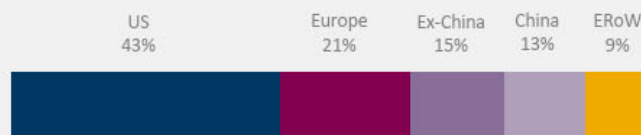


H1 2025 – growth supported by diverse, broad-based business

H1 2025 | % Total Revenue by therapy area

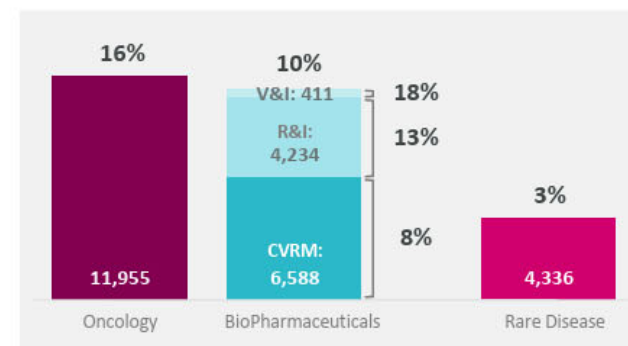


H1 2025 | % Total Revenue by geography



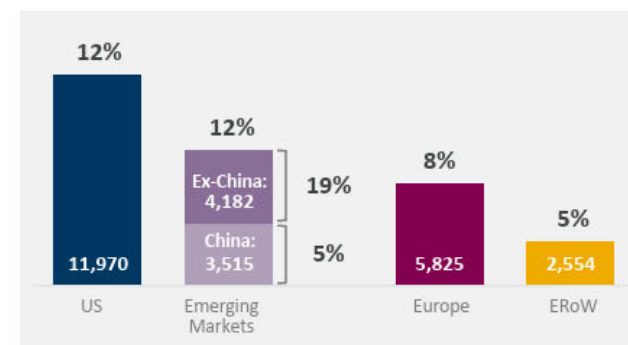
Strength across therapy areas

H1 2025 | Total Revenue (\$m)



Growth across geographies

H1 2025 | Total Revenue (\$m)



All growth rates at CER.
Appendix: [Glossary](#)





India Update

Praveen Rao Akkinpally
MANAGING DIRECTOR



Country Macro Economic Environment

Growing Economy

- **GDP** : \$3.9 Trillion (5th largest)
- **Per Capita Income** : ~\$2.7k
- **Healthcare** a State Subject, India spends **1.9% of GDP** on HC, plan to reach 2.5% by '25

Stable Political Environment

- Govt. for last 11 years (3rd term)
- Focus on **Make in India** &
- **Digital India**

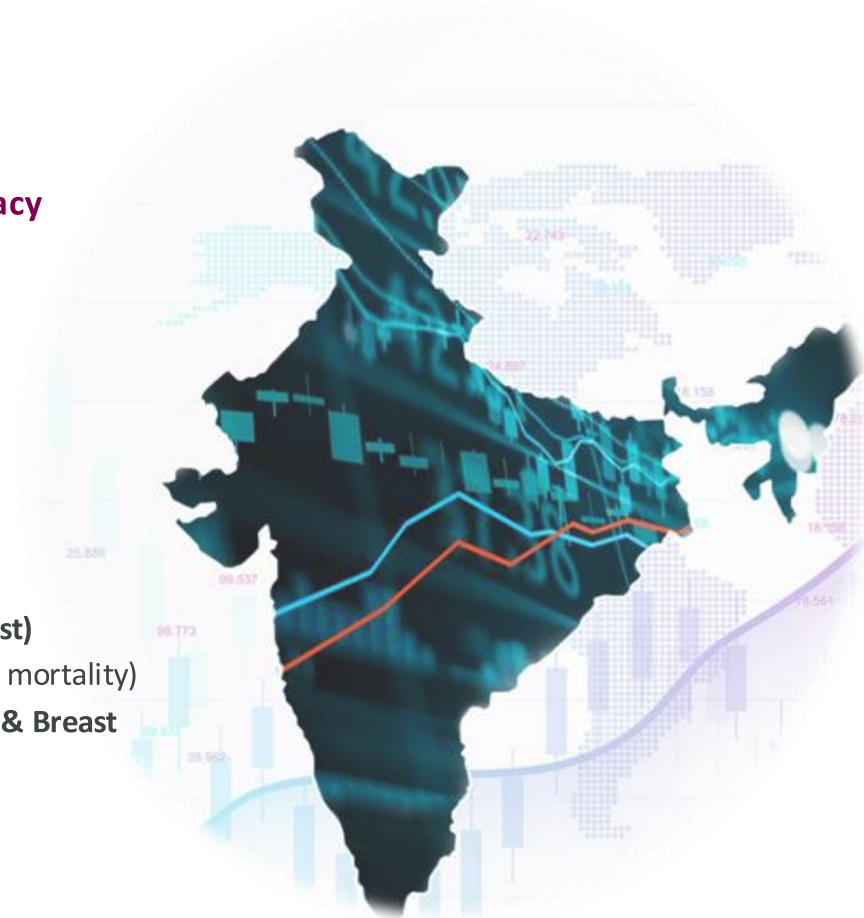
Policy Reforms (Net Favorable)

- **Patent Amendment**
- **Govt. UCPMP** code for Pharma
- **New GTE- PPO Exemption** released,
- **Nat. Policy on RD**; Innovation & R&D

World's Largest Democracy
>1.42 Bn Population
28 States

Disease Burden:

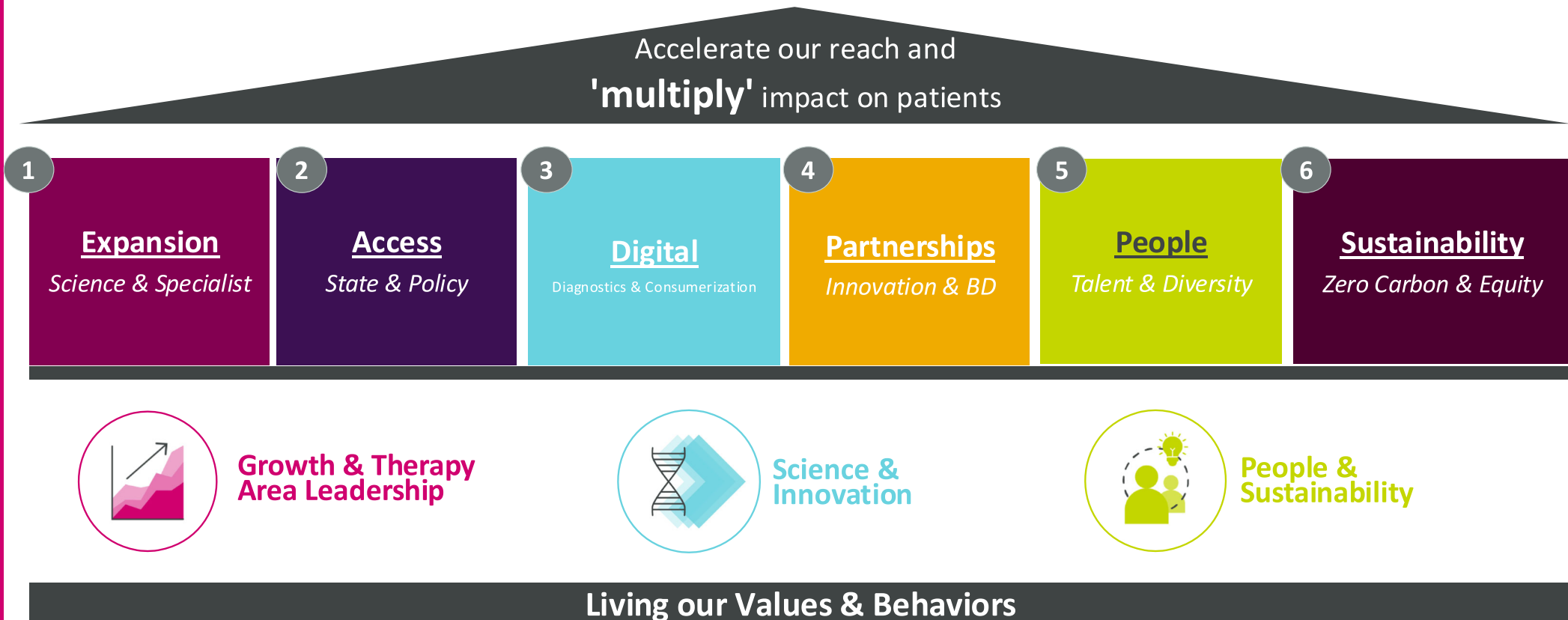
- **CKD & Diabetes** (2nd Highest)
- **COPD** (2nd leading cause of mortality)
- **High incidence of Lung, GI & Breast Cancer**



Our purpose is
focused around
helping more
patients live
better, healthier
lives

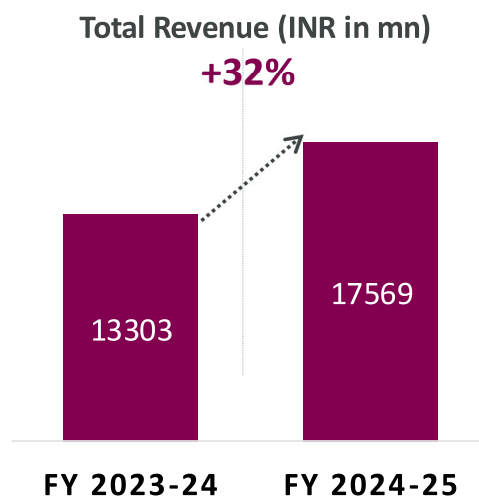


India strategy is aligned with global priorities and remains consistent

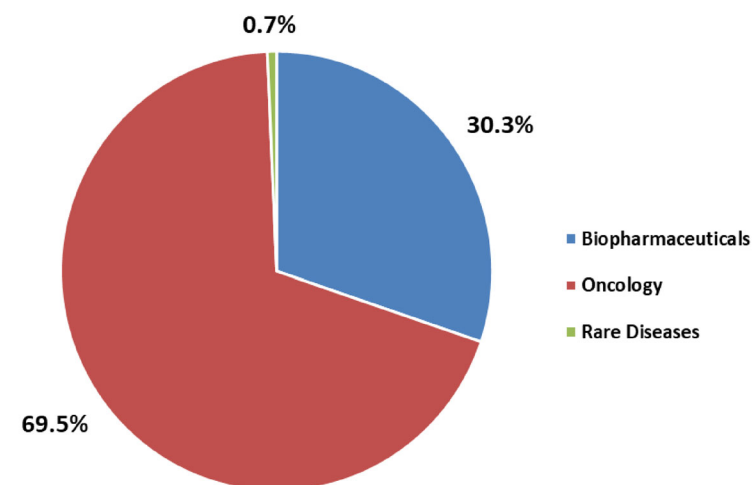


AZPIL delivers strong double-digit growth

Strong commercial performance and financial execution in FY 2024-25



% Sales by therapy area



Financial snapshot of FY 2024-25¹

Source: 1- Annual Report FY 2024-25



AstraZeneca is amongst the fastest growing companies in Indian Pharmaceutical Market



Ranks 6th amongst MNCs in IPM²
Oncology business ranks 2nd in IPM¹



First Oncology brand to surpass INR 200 Cr within 12 months of launch



No.1 lung cancer brand & 3rd largest Onco brand in the country¹



Sustains its market leadership in OAP (oral antiplatelet) market with double digit growth despite LoE²



Launched in April 2021; is the No.1 respiratory biologic (by value) in the country



Fastest growing among leading Oncology brands¹

Source:

1. IPSOS Oncology Sales Audit Report for Dec MAT 2024. Ipsos India Oncology Sales Audit (December MAT 2024), reporting Net Realized Value of all brands marketed by ~ 60 Oncology companies across India. Data collected using open-source intelligence and telephone interviews. Participants include sales/marketing personnel from pharmaceutical companies and pharmaceutical distributors. Market dynamics and figures may have evolved since then. Please refer to the latest industry reports and news sources for the most up-to-date Information
2. IQVIA MAT Mar'25



Bringing innovative medicines to India in FY 24-25

New medicines and additional indications



DUO-E



AEGEAN



ADRIATIC



HIMALAYA

New medicines - to be launched



Expanding strategic collaborations to become a 'Partner of Choice'



Government of Karnataka
Deepening partnership to
enhance access and healthcare
innovation



Government of Goa
India's first state to integrate
early screening, RWE data &
confidential pricing for patented
medicines.



Government of Tamil Nadu
Driving access initiatives &
shaping policy priorities.



Ramping up our digital capabilities to anchor 'Simplification' and 'Transforming Care'



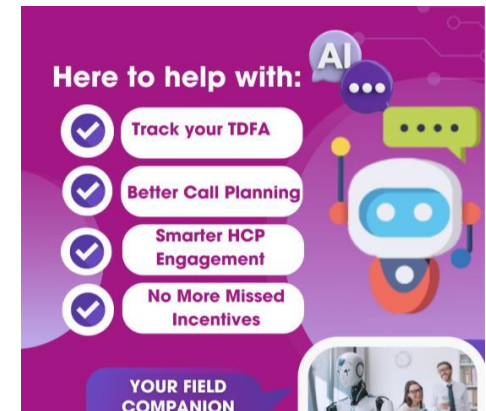
AI Accelerator program
Season 2 launched



Introducing **myAZ on MS teams** –a daily companion



Smarter. Faster. Better:
AZ ChatGPT



IN first market to use
'smart' companion for
HCP calls



Sharing our purpose consistently in the country



Won Medical Excellence award by OPPI



7th Consecutive Great Place To Work certification



Won 'Silver' for our I&D agenda by ASSOCHAM



Runner up award in D&I category by OPPI

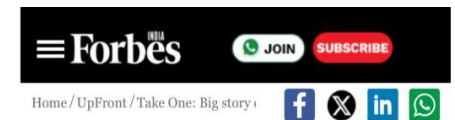


AI should complement and not replace human interaction: Amarpreet's advice on leveraging AI and building more impactful learning programs

Amarpreet Kaur Ahuja, Country Head - HR, AstraZeneca India shares her vision of leveraging AI to create better learning outcomes and unpacks other trends crucial for 2024



As 2024 shapes to be another crucial year where companies scale their learning and upskilling efforts and embed newer technologies, we sit with Amarpreet Kaur Ahuja, Country Head - HR, AstraZeneca India, to explore how HR leaders can unlock employee productivity this year. Our conversation spans critical skills



AstraZeneca's roadmap to making its medicines more accessible in India

The pharma major wants to bring innovative medicines to India faster, while increasing the access to its mass-market products through tie-ups with domestic players

By: Naini Thaker

Published:
13/11/2024 04:59 PM





Therapy Areas we are present in:

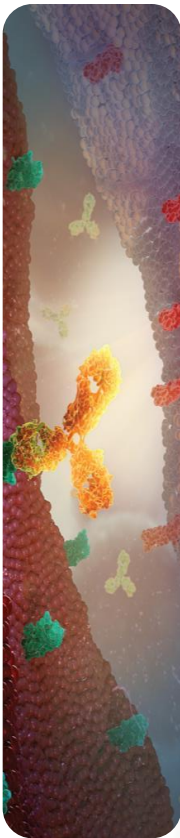
Oncology

Biopharmaceuticals

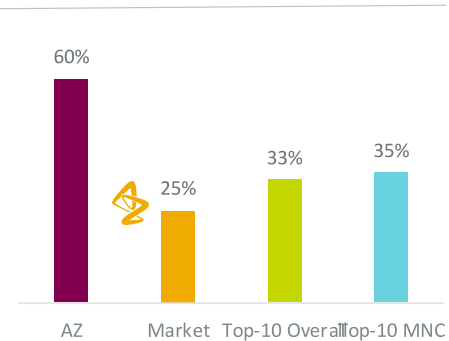
Rare Disease



Oncology business continues robust growth supported by Innovative Science

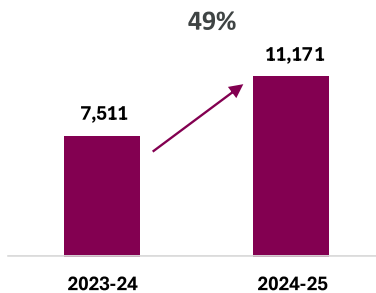


IPSOS GR% (MAT DEC 24 vs MAT DEC 23)

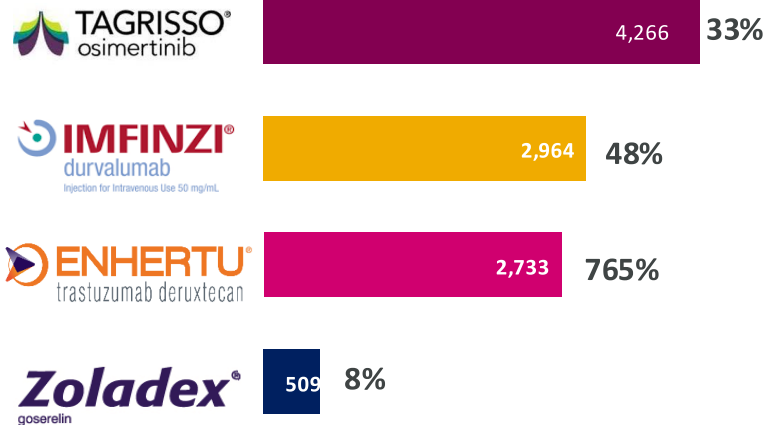


AZ Rank MAT Dec'24 2

ONCOLOGY TA PERFORMANCE (Mn)



KEY BRAND PERFORMANCE



(1) IPSOS, MAT Dec'24
(2) Internal Records



Enhancing healthcare ecosystem collaboratively in Oncology and drive large scale patient awareness



Launched India's '**Partnership for Healthcare Systems Sustainability & Resilience (PHSSR)**' Report with ~ 20 influencers including MoHFW, Swedish Ambassador, Medical professionals and Patient Support Groups



The initiative helping to **establish NGS platform-based lung cancer biomarker testing** with easy access beyond metro cities in private and public channel

1951
Patients enrolled

1088
Patients reported

~500
HCPs ordered test

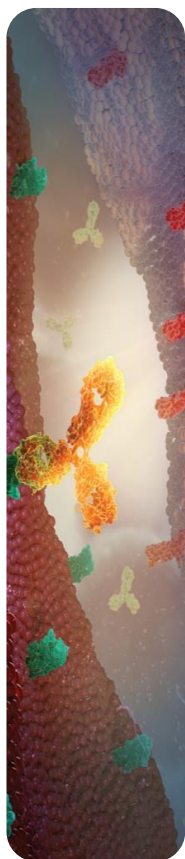
~200
Cities/towns



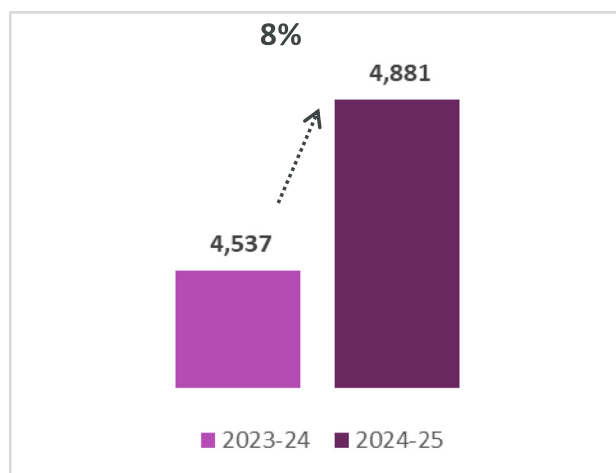
Partnership with FICCI Heal to build progressive access strategies in lines with 'Swasthya Bharat Viksit Bharat' policy discussions



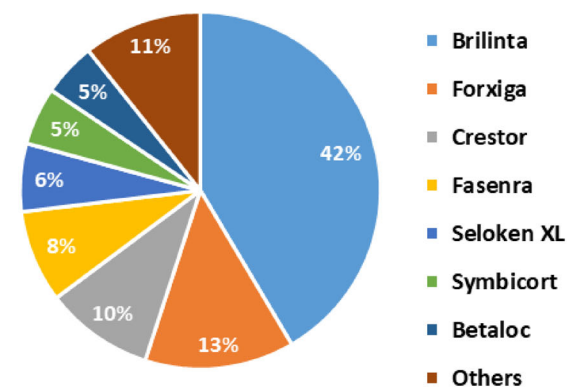
Biopharmaceuticals business continues growth with focus on specialist portfolio and pipeline



BBU TA Performance (Mn)



% Sales by brands



BBU portfolio grew by 8% despite of headwinds from generic brands



Transforming chronic care through Patient Centricity



Community Education through Social media

- 700+ Patient education posts
- 45 Live sessions with experts
- 7 million views 12 million+ users reached



Tech-enabled diagnosis, using AI-powered ECG devices and cloud-based algorithms

- 37 Cardiac Hubs connected to 150+ remote locations
- 189,000+ Patients screened; 47% diagnosed with abnormal ECGs
- 13,000+ critical misidentified—enabling timely, lifesaving intervention

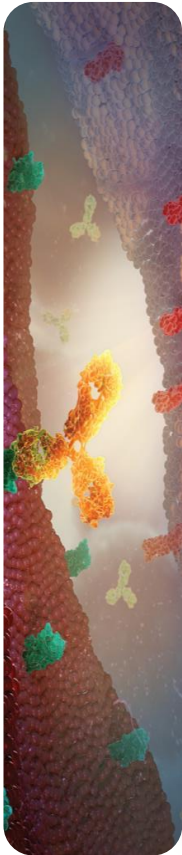


With the national average of diagnosed severe asthma cases, our Precision Clinics are bridging the gap.

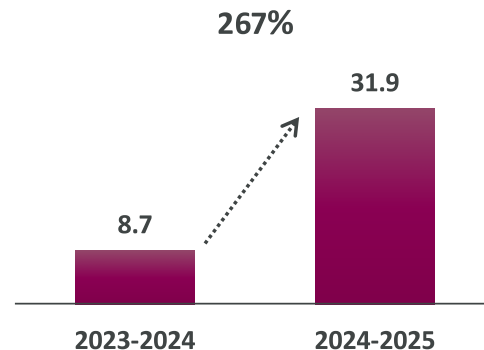
- 200+ clinics established
- 170,000+ Patients Screened
- 5,000+ Severe asthma patients identified (3% rate—10x national average)



Continue building the foundation for our Rare Disease portfolio



RD TA Performance (Mn)



Koselugo
(selumetinib)
10 mg & 25 mg capsules



Rare disease awareness eg-Race for 7,
Walk for Rare events



Policy discussions at JK Lone Hospital,
regarding access to NF1 and aHUS



Sustainability strategy at AstraZeneca



How we do business

We are guided by our Values and invest in our people to create long-term value, resilience and trust by operating responsibly, ethically and with robust governance



How we make a positive impact

Through the power of science and innovation, we are building a healthy future for people, society and the planet



CSR program impact last FY 2024-25

Access to Healthcare



Ganga Godavari screening programme

5 impactful years of early cancer detection (FY 2024–25)

- Reached underserved women (30–65 years) in UP, Maharashtra, and Haryana
- Partnered with NARCHI Delhi for ASHA training scale-up (2–3 years)
- Integrated Niramai's AI-based breast screening at camps & PHCs
- Screened 8,000+ women in South Delhi with CAPED, ensuring early detection & seamless public health linkages



Young Health Programme

Improving long-term health outcomes for vulnerable adolescents

- HICs set up in Yelahanka, Dasarahalli, Thubarahalli & Hoodi (Bengaluru)
- Reached 1.2 lakh community members
- Engaged over 15,000 youth (50% girls) aged 10–24 years
- Trained 80 Peer Educators across schools, health centres & community groups

Environmental Sustainability



PANI (Providing & Augmenting Natural-resource-based Interventions)

Reviving Water, Restoring Livelihoods

- Rejuvenating waterbodies & livelihoods in 6 high-need villages (Nagpur & Satara)
- Focus on community empowerment & environmental resilience

AZ Forest India

Greening for Climate and Community

- Completed 3-year project in Bengaluru with SankalpTaru
- Planted 5,000 geo-tagged native trees, now handed to the local community for stewardship



Our GPTW strategy is aligned to People Development

INTERNAL PULSE SURVEY

82%

Employees are satisfied with our talent development initiatives

87%

Employees believe AstraZeneca is a Great Place to Work

90%

Employees agree that AstraZeneca embraces honesty and integrity

93%

Employees are aligned with our sustainability priorities

EXTERNAL RECOGNITIONS



Years in a row
- Certified



Certified a **Great Place to Work** by GPTW Institute for the **Seventh consecutive year**



Silver Award for **Best Employer for Women** from ASSOCHAM



Diversity & Inclusion (runner up) Award from OPPI

L&D INITIATIVE



Partnered with **IIM Bangalore** to deliver **customised managerial development** cohorts for 45+ high-potential employees



Women in sales internship program: 'Prerna'- Aspire, Advance, Achieve.



Our **inaugural cohort welcomed 15 aspiring young women** from diverse institutes, reflecting our commitment to gender diversity and inclusion in science



Inspired by our purpose and values, we're transforming the future of healthcare by unlocking the power of what science can do – for people, society and the planet.



We Follow
the Science



We Put
Patients First



We Play
to Win



We Do the
Right Thing



We are
Entrepreneurial



Everything we
do will
empower us to
help **more**
patients live
better, healthier
lives.





Thank you
for your
contribution and
support to our
growth story.

