

04 February 2024



RESEARCH DELTA ADVISORS

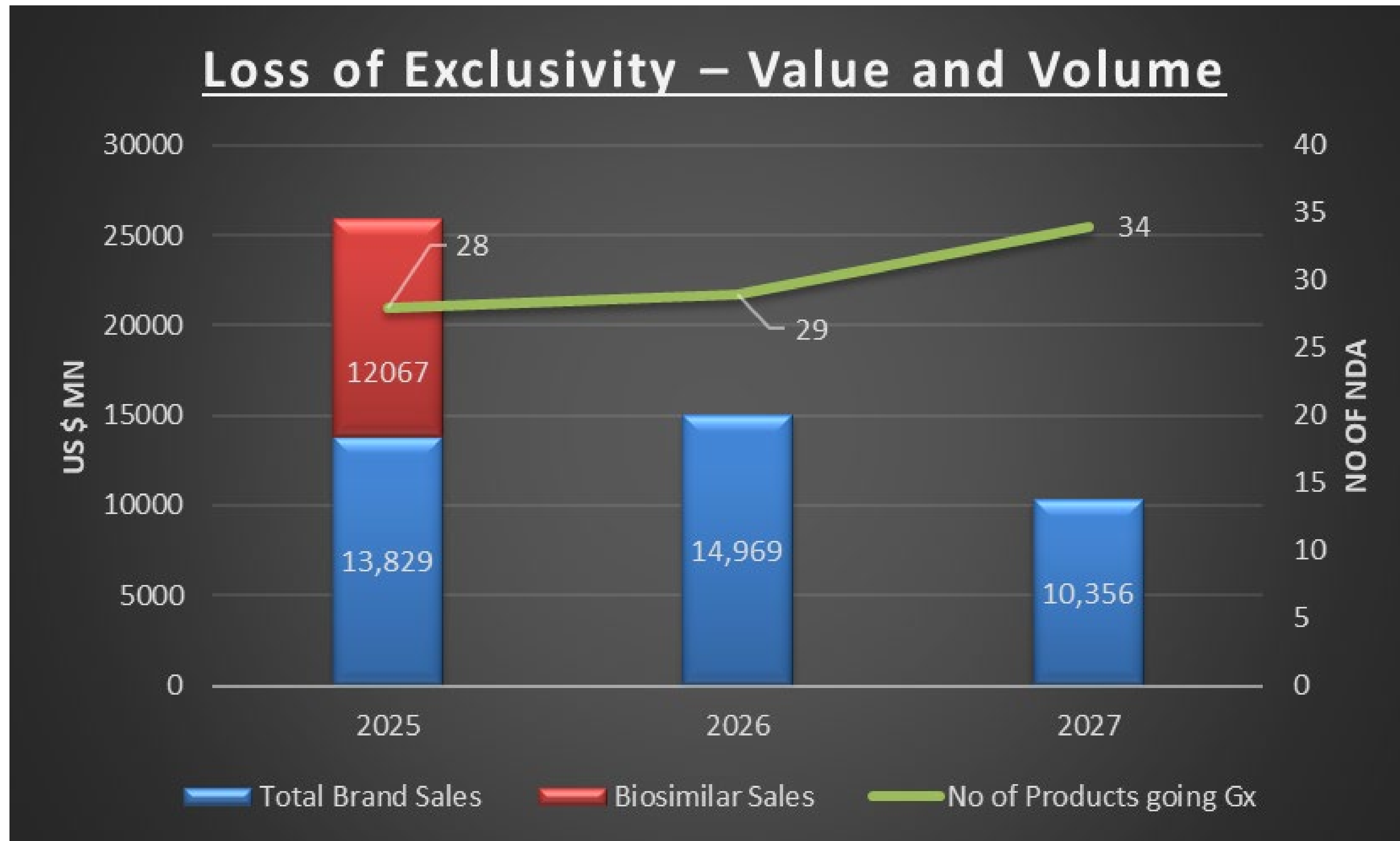
US GENERICS – UPCOMING LOSS OF EXCLUSIVITIES: 2025-2027

☎ +91.9909919584

✉ nimish@researchdelta.com

US GENERICS – LOSS OF EXCLUSIVITIES: 2025-2027

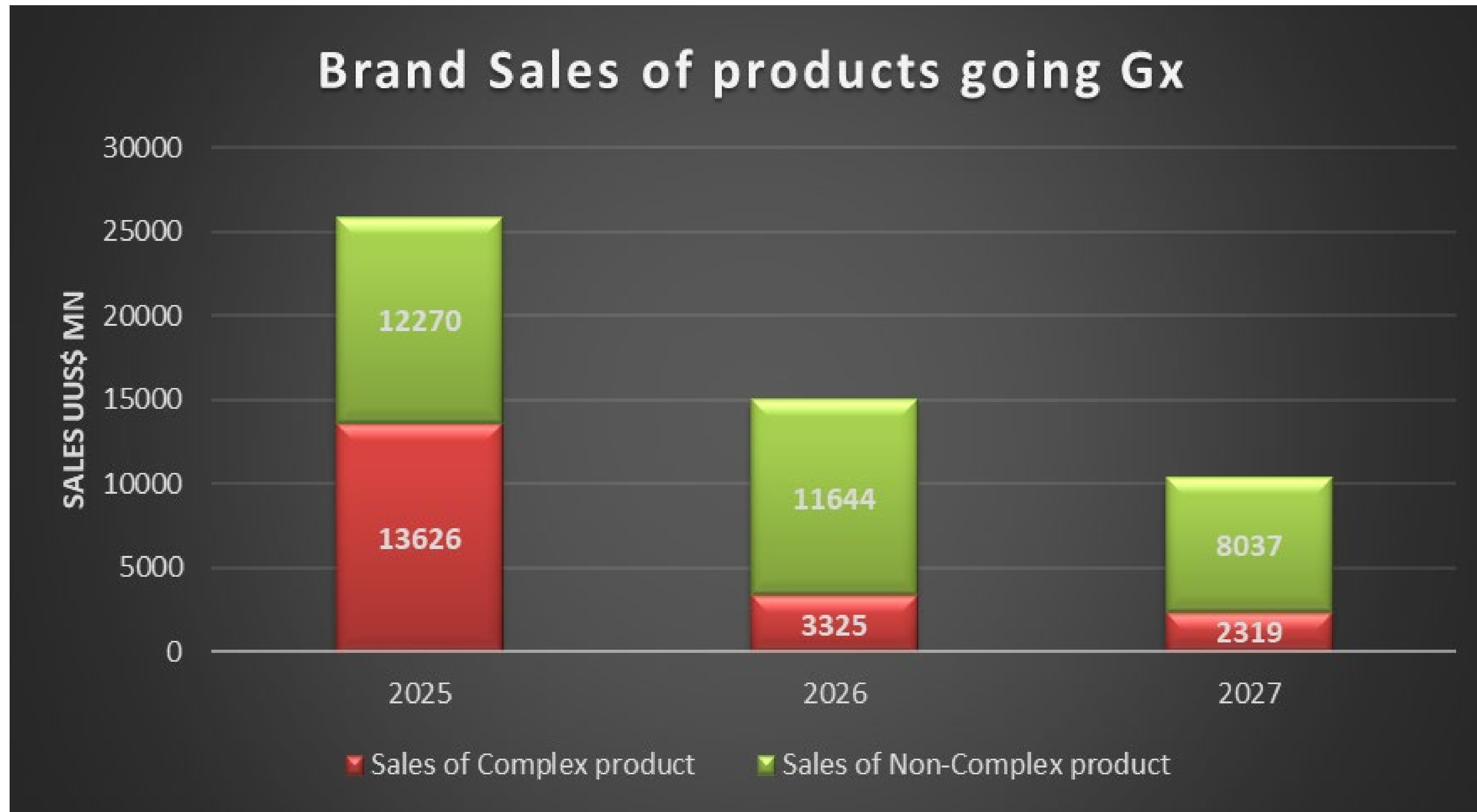
LOE – 2025 THROUGH 2027



*Includes Biosimilars

Source:- Para IV Insights (Research Delta)

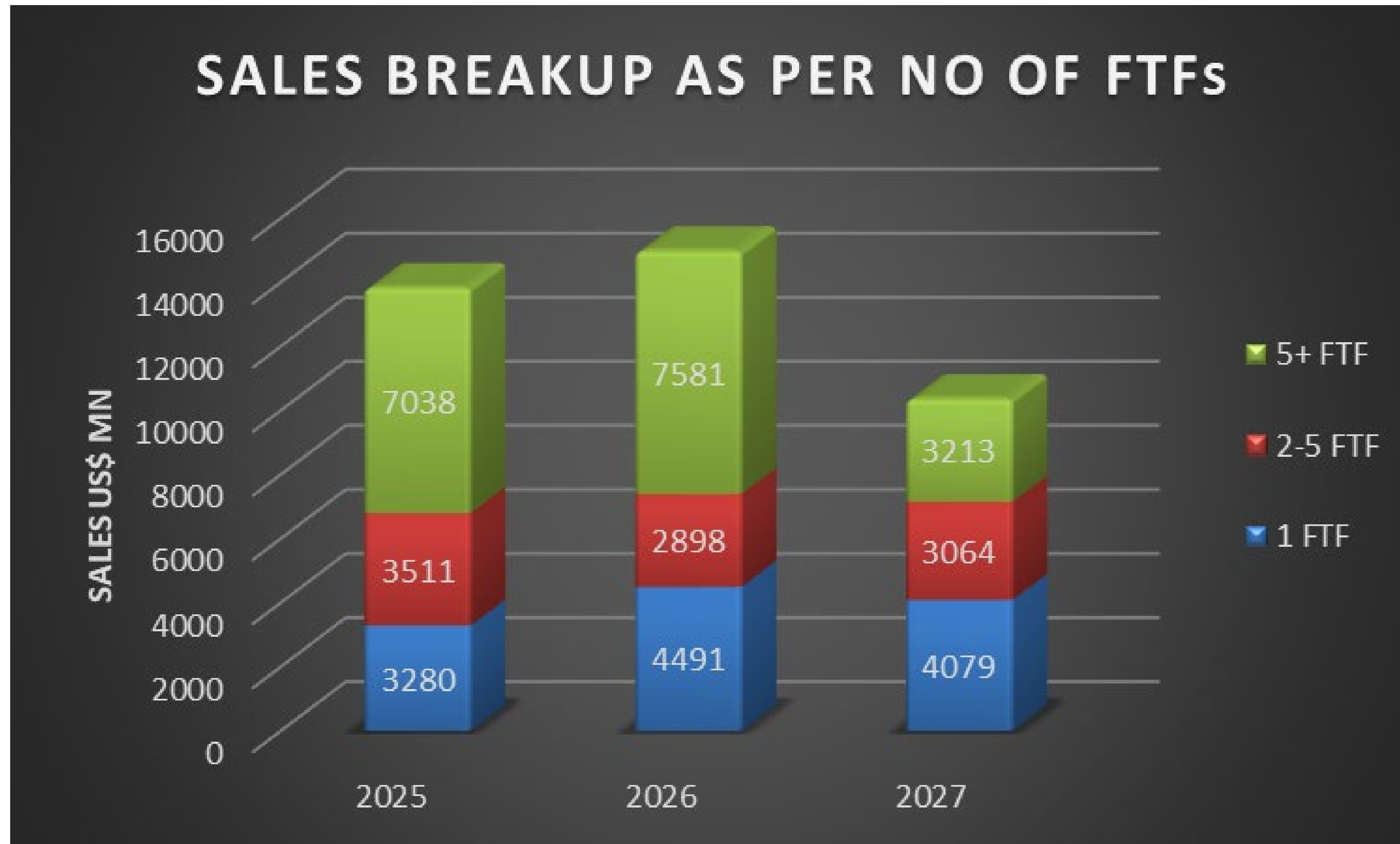
COMPLEX GENERICS DOMINATES THIS YEAR



*Biosimilars are considered as Complex Products

Source:- Para IV Insights (Research Delta)

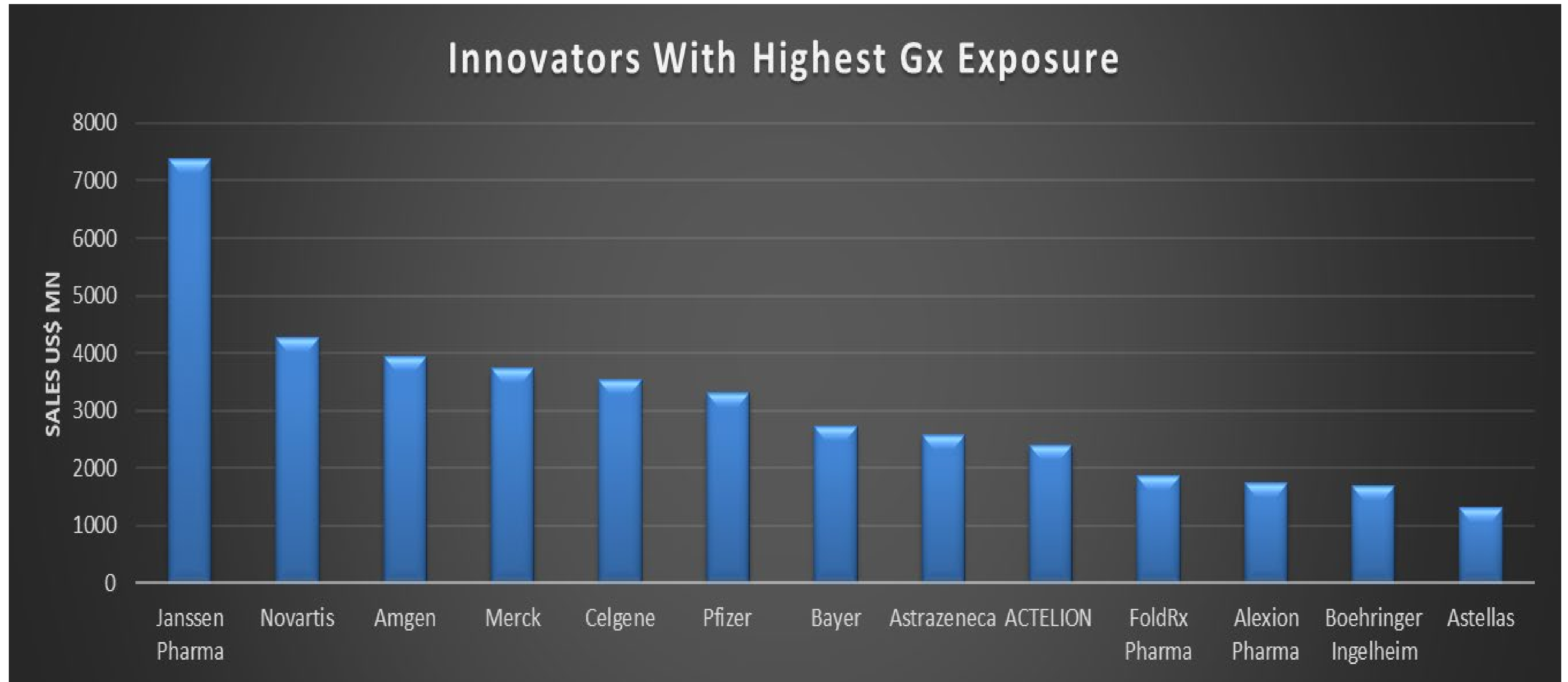
SOLE FTFS CONTRIBUTION INCREASES FROM 24% TO 39%



*Excludes Biosimilars

Source:- Para IV Insights (Research Delta)

INNOVATORS' EXPOSURE TO GENERICS



Source:- Para IV Insights (Research Delta)

GENERICS OPPORTUNITY – INDIAN CO. DOMINATES PARA IV SPACE

Sr. No.	Company	No. of ABLAs	No. of FTFs	No. of Para IVs	FTFs as % Para IVs
1	Teva	-	30	46	65%
2	MSN Labs	-	15	28	54%
3	Apotex	-	14	26	54%
4	Lupin	-	13	24	54%
5	Sun Pharma	-	9	24	38%
6	Aurobindo	-	7	23	30%
7	Zydus Cadila	-	12	23	52%
8	Mylan	-	14	19	74%
9	Dr Reddy's	-	8	18	44%
10	Sandoz	1	10	17	59%
11	Cipla	-	6	14	43%
12	Actavis	-	10	13	77%
13	Alkem	-	7	13	54%
14	Alembic	-	9	12	75%
15	Hetero	-	8	12	67%
16	Princeton Pharma	-	5	10	50%
17	Biocon	1	1	9	11%
18	Microlabs	-	6	9	67%
19	Amneal	-	4	8	50%
20	Endo Pharma	-	5	8	63%
21	Macleods	-	4	8	50%
22	Torrent	-	6	8	75%
23	Accord (Intas)	-	5	7	71%
24	Ajanta Pharma	-	2	7	29%

Source:- Para IV Insights (Research Delta)

GENERICS OPPORTUNITY – INDIAN CO. DOMINATES PARA IV SPACE

Sr. No.	Company	No. of ABLAs	No. of FTFs	No. of Para IVs	FTFs as % Para IVs
25	Breckenridge	-	4	7	57%
26	Annora Pharma	-	2	6	33%
27	Fresenius Kabi	1	5	6	83%
28	Laurus Labs	-	2	6	33%
29	Sciegen Pharma	-	0	6	0%
30	Glenmark	-	4	5	80%
31	Hikma	-	1	5	20%
32	Unichem	-	1	5	20%
33	USV private limited	-	1	5	20%
34	Alvogen	-	0	4	0%
35	Ascent Pharms	-	0	4	0%
36	Azurity	-	3	4	75%
37	Chemo Research	-	0	4	0%
38	Mankind pharma	-	1	4	25%
39	Aizant	-	3	3	100%
40	Gland Pharma	-	1	3	33%
41	Hec Pharma	-	1	3	33%
42	Padagis	-	3	3	100%
43	SigmaPharma	-	2	3	67%
44	Sinotherapeutics	-	0	3	0%
45	Umedica	-	0	3	0%
46	Wockhardt	-	1	3	33%
47	Amgen	2	0	2	0%
48	Anobri Pharma	-	2	2	100%

Source:- Para IV Insights (Research Delta)

GENERICS OPPORTUNITY – INDIAN CO. DOMINATES PARA IV SPACE

Sr. No.	Company	No. of ABLAs	No. of FTFs	No. of Para IVs	FTFs as % Para IVs
49	Changzhou Pharma	-	1	2	50%
50	Dexcel Pharma	-	0	2	0%
51	Epic pharma	-	0	2	0%
52	eVenus (Jiangsu Hengrui medicine co.)	-	2	2	100%
53	Indoco Remedies	-	0	2	0%
54	Inventia	-	1	2	50%
55	Natco	-	1	2	50%
56	Qilu Pharma	-	1	2	50%
57	Sagent Pharma	-	1	2	50%
58	Amerigen Pharma	-	1	1	100%
59	Anchen	-	1	1	100%
60	ANI Pharma	-	0	1	0%
61	Apicore	-	0	1	0%
62	Ascent Labs	-	1	1	100%
63	Aspiro pharma	-	1	1	100%
64	Biophore india	-	0	1	0%
65	Celltrion	1	0	1	0%
66	Crystal pharmaceuticals	-	1	1	100%
67	Fisio pharma	-	1	1	100%
68	Granules India	-	0	1	0%
69	Hisun pharma	-	1	1	100%
70	Hi-Tech Pharma	-	0	1	0%
71	Hopewell Pharma Ventures	-	0	1	0%
72	Humanwell Puracap	-	0	1	0%

Source:- Para IV Insights (Research Delta)

GENERICS OPPORTUNITY – INDIAN CO. DOMINATES PARA IV SPACE

	Company	No. of ABLAs	No. of FTFs	No. of Para IVs	FTFs as % Para IVs
73	InnoPharma	-	1	1	100%
74	Jubilant	-	1	1	100%
75	Lannett	-	0	1	0%
76	Mayne Pharma	-	0	1	0%
77	Noratech pharmaceuticals	-	1	1	100%
78	Novugen pharma	-	1	1	100%
79	Orbicular	-	0	1	0%
80	Paddock	-	0	1	0%
81	Perrigo	-	0	1	0%
82	Rhodes Pharma	-	0	1	0%
83	Rio biopharmaceuticals	-	0	1	0%
84	Saba Ilac Sanayi Ve Ticaret As	-	0	1	0%
85	Seasons Biotechnology	-	1	1	100%
86	Shanghai Zhongxi	-	0	1	0%
87	Somerset	-	0	1	0%
88	Sunshine pharma	-	1	1	100%
89	Synthon Pharma	-	0	1	0%
90	Twi Pharma	-	0	1	0%
91	VGYAAN Pharmaceuticals	-	0	1	0%
92	Wilshire	-	1	1	100%
93	Zenara pharma	-	1	1	100%
94	ZHEJIANG	-	0	1	0%

Source:- Para IV Insights (Research Delta)

ANNEXURE

2025 : PRODUCTS LOSING EXCLUSIVITY

Sr. No.	Brand Name	Generic Name	Dosage
1	Adzenys XR- ODT	Amphetamine	3.1,6.3,9.4,12.5,15.7,18.8 mg; Tablet Extended
2	Premium Content		
3			
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5			
6			
7			
8			
9			
10			
11			
12			
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14			
15			
16			
17			
18			
19			
20			
21			

Source:- Para IV Insights (Research Delta)

2025 : PRODUCTS LOSING EXCLUSIVITY

Sr. No.	Brand Name	Generic Name	Dosage
22	Premium Content		
23			
24			
25			
26			
27			
28			

Source:- Para IV Insights (Research Delta)

2026 : PRODUCTS LOSING EXCLUSIVITY

Sr. No.	Brand Name	Generic Name	Dosage
1	Aplenzin	Bupropion Hydrobromide	174, 348, 522 mg; Tablet, Extended Release
2	Premium Content		
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15			
16			
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18			
19			
20			
21			

Source:- Para IV Insights (Research Delta)

2026 : PRODUCTS LOSING EXCLUSIVITY

Sr. No.	Brand Name	Generic Name	Dosage
22	Premium Content		
23			
24			
25			
26			
27			
28			
29			

Source:- Para IV Insights (Research Delta)

2027 : PRODUCTS LOSING EXCLUSIVITY

Sr. No.	Brand Name	Generic Name	Dosage
1	Children's Astepro Allergy (OTC)	Azelastine Hydrochloride	205.5 mcg/spray ; Nasal Spray
2	Premium Content		
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17			
18			
19			
20			
21			
22			

Source:- Para IV Insights (Research Delta)

2027 : PRODUCTS LOSING EXCLUSIVITY

Sr. No.	Brand Name	Generic Name	Dosage
23	Premium Content	Premium Content	Premium Content
24			
25			
26			
27			
28			
29			
30			
31			
32			
33			
34			

Source:- Para IV Insights (Research Delta)

THANK YOU