# *10 Trends*
# Shaping Indian Pharma:

# Insights from 2025
# *A Marketing-Led Perspective*

By

# Brand Innerworld
### AI Consultancy and Training Firm

## Author's Note

*2025 passed, and for the pharmaceutical and life sciences sector, it was a year in which several significant shifts became impossible to ignore.*

*Shifts that had been quietly brewing earlier did not merely surface in 2025; they became unmistakably visible.*

This report captures ten trends that emerged in 2025 and will only strengthen as the industry moves into 2026 and beyond.

*At Brand Innerworld, we operate as a specialised AI brand consultancy and training partner to the pharmaceutical and healthcare industry and periodically publish perspective reports based on published information and our on-the-ground observations.*

These perspectives are grounded in continuous engagement with brand teams, senior leadership, sales organisations, medical functions, and ecosystem partners.

**Methodology:**

This report draws on three core inputs:
-publicly available industry information and signals;
-direct on-ground experience working with pharmaceutical companies

I hope this report helps you understand what changed, why it matters, and how to prepare for what comes next.

Warm regards,
**Gauri Chaudhari**

*Trend 1*

# UCPMP Compliance

*From Policy to Practice*

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## Positive Momentum in UCPMP Compliance:
## From Policy to Practice

Over the past few years, the Indian pharmaceutical industry has shown a **clear shift towards stronger compliance** with the Uniform Code for Pharmaceutical Marketing Practices (UCPMP) 2024.

While the journey is far from complete, the direction of change in 2025 is unmistakably positive.

Earlier, UCPMP compliance largely remained **infrastructural,** limited to policy documents, intent statements, and high-level commitments.

Today, there is visible movement towards **operationalisation**, with companies embedding UCPMP requirements into everyday marketing.

This transition is being shaped by
- **Heightened regulatory signalling** from the  Government
- **Stronger self-regulation** ensured by industry associations
- **Real possibility** of UCPMP acquiring **statutory force**

As a result, several reputed pharmaceutical companies have begun responding decisively, formalising SOPs, deploying digital compliance tools, tightening approval workflows, and investing in internal training.

While implementation remains uneven, the direction set by industry leaders is encouraging.

From my three decades of experience in the pharmaceutical industry, I am hearing far more frequent, serious, and structured discussions around UCPMP compliance than ever before- a crucial cultural shift.

Overall, the industry is in a **transition phase**, marked by a positive shift in intent and behaviour, even as consistency and accountability continue to mature.

**The movement is palpable—and that, in itself, is a welcome change.**

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# *Trend 2*
# Brand Activation
## *At Consumer Level*

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# A Large-Scale Consumer Activation: At Corporate, OTC Brand, and Therapy Levels

2025 began with the **Mahakumbh**, where consumer brands participated at scale. While consumer companies rushed to leverage the Mahakumbh in January 2025, pharma companies demonstrated equal agility.

Pharma brands decisively adopted consumer brand playbooks, building **corporate trust**, **driving OTC brand** relevance, and **shaping therapies for Rx brands** at the patient level.

At Kumbh, pharma participation moved well beyond presence, with brands being **noticed, covered, and applauded** by leading marketing and media platforms for their creativity and innovation.

## 1) Corporate Branding

Mankind Pharma led with corporate health stewardship rather than brand push. Its large healthcare camps, supported by **Pathkind**, offered free check-ups, BP monitoring, first aid, and health product distribution. The activation positioned Mankind as a *national health partner*—a classic FMCG-style corporate trust play built on service, visibility, and scale.

## 2) OTC Branding

OTC brands behaved in precisely the same way as renowned consumer brands. Cipla Health activated Omnigel through **Rahat Seva Kendras**, providing massages for walking-induced pain.
Lupin's Vovilup followed a similar service-led **pain-relief model**, while Haleon ran multi-brand wellness zones with Sensodyne, ENO, Iodex, and Centrum—sampling, screening, and relief rolled into one.



Photo from Impact

## 3) Therapy Shaping

Sun Pharma collaborated to participate in **Netrakumbh** . AI-enabled eye screening was used as a public health intervention to educate patients before they entered the medical system.

Together, Mahakumbh showed Indian pharma decisively adopting **consumer-brand playbooks at a population scale**.

Together, these activations signal the evolution of Indian pharma into **experience-driven, consumer-facing healthcare brands operating at a population scale.**

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# *Trend 3*

# Direct- to -Patients
## *Therapy Shaping Initiatives*

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## Direct- to- Patients :
## Therapy Shaping through Extended Reach

In 2025, the Indian pharma industry saw a clear, decisive shift toward directly engaging patients at the **awareness stage** through **mass media and high-reach digital channels**.

While this approach remains firmly within regulatory boundaries, the direction of change is unmistakably sharp.

Earlier, patient engagement in India was almost entirely indirect, routed through doctors and largely confined to clinics, camps, or long-format educational initiatives.

Today, there is a clear shift toward large-scale **awareness-building**, deploying **hoardings, national print**, and **digital platforms** to reach patients well before clinical interactions.

This shift is powerfully illustrated by **Lilly**, which invested heavily in **obesity awareness** campaigns across print ,outdoor, print, and digital media.



A second, distinct illustration is seen in **Cipla**'s campaign **for inhaled insulin (Afrezza)**.

Leveraging celebrity endorsement, the campaign featured **Raveena Tandon** in a paparazzi-style, **consumer-advertising tonality** to announce the arrival of inhaled insulin.

Overall, the industry is entering a **transition phase** in which patient-led awareness is shaping clinic conversations—signalling a **noteworthy shift** in Indian pharmaceutical marketing.

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# Trend 4

# Tier 2 Onwards:

## From Strategic Focus to Measurable Contribution

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# Tier 2 Onwards: Beyond Metros and Class One From Strategic Focus to Measurable Contribution

In 2025, growth beyond metros became visible and measurable, trend that was seen in earlier years as well

| Category | M.S. |
|---|---|
| Metros | 35% |
| Class 1 | 31% |
| Extra Urban | 34% |

The contributing factors over the years are
**1) Insurance penetration has decisively shifted to non-metro.**
Tier 2, Tier 3, and rural regions accounted for 62% of all new health insurance policies. The share of higher-value policies (₹10–15 lakh cover) has risen in Tier 3 markets from 24% in 2022 to 49% in 2025.

2) **The e-pharmacy market is projected to grow at a 16.7% CAGR**, with **30–45% of new users** now coming from non-metro locations, driven by smartphone and internet penetration.

**3) Expanding healthcare infrastructure:**
*India is estimated to require ~1 million additional hospital beds over the next decade, with Tier 2 and Tier 3 cities expected to lead this expansion.*

4)**Telehealth** providers report that **up to 67% of the rural and semi-urban population is now being actively addressed**, positioning Tier 2 and Tier 3 markets as the next structural growth engine for healthcare delivery.

## What does it mean for a pharma marketer?

· **Tier 2 and Tier 3 can no longer be treated as downstream volume markets**
They require dedicated brand strategies, portfolios, and execution plans built around continuity of care, not just reach.

· **Brand building must extend beyond price and availability**, focusing on trust, education, and long-term therapy relevance across chemists, GPs, and digitally enabled patients in their native language.

· **Winning brands will be those that design explicitly for Extra-Urban realities**—simpler messaging, stronger last-mile execution is critical.

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*Trend 5*

# HCP Engagement
## Driven By WhatsApp

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# WhatsApp:
## From Informal Usage to a Core Field-Force Support Channel

In 2025, **WhatsApp** consolidated itself as a key support channel.

With message open rates consistently reported at **~98%**, WhatsApp far outperforms traditional digital channels such as email (**~20–22%**) and SMS, making it the most reliably consumed format for doctors.

Studies show that over **86–87% of** Indian HCPs use WhatsApp for professional communication, and more than 95% of doctors use it daily, particularly across Tier 2 and Tier 3 towns.

Physician click rates on WhatsApp are **3.5× higher than email and nearly 24× higher than SMS**, underscoring why it has become the most effective digital channel for sustaining pharma–HCP conversations.

Internal industry case studies further show that **localized, relevant WhatsApp updates can drive 5–6× higher engagement**, with a direct positive impact on prescription intent for newer therapies.

In practice, WhatsApp is being used for medical information support, post-call reinforcement, logistics updates, and clinical coordination roles that doctors perceive as **helpful, timely, and non-intrusive**.

### What does it mean for a pharma marketer?

· **Use it the right way:** Always communicate through official WhatsApp Business accounts and only with doctors who have clearly agreed to be contacted.
· **Stay compliant and respectful:** Messages should follow industry codes and data-privacy norms, and never feel intrusive or excessive.
· **Add real value:** WhatsApp works best when it supports the medical representative—by sharing useful, timely information—not when it is used for pushy promotion.

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# *Trend 6*
# Content Maturity
## for HCPs and Patients

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# Content Maturity for HCP Engagement

Though not yet uniform across the industry, **leading pharma companies have clearly moved beyond product brochures and purely rep-led messaging**, adopting more structured, value-driven engagement models.

In 2025, for winning brands, content marketing matured into a **value-led, omnichannel HCP engagement model**—designed around education, relevance, and convenience rather than promotion.

**What signals this maturity?**

1.  **Audience-first knowledge**
Leading players invested in structured knowledge platforms, medical affairs–led content, and therapy-focused education, often independent of immediate brand promotion.

**2. Integrated journeys replace isolated tactics**
Content worked as a connected flow: awareness articles, deep-dive clinical microsites, webinars, and reinforcement via WhatsApp, mapped to the HCP's learning or decision journey.

**3. Thought leadership over noise**
Mature companies are investing in Indian real-world evidence, guideline discussions, and public-health themes (AMR, chronic disease management), positioning themselves as **credible healthcare partners**.

**4. Formats built for busy doctors**
Short videos, podcasts, micro-learning modules, and mobile-first content dominate—making learning possible between patients, not just at conferences.

**What does this mean for marketers?**

*   **Design content for MR-led conversations, not parallel communication**
Digital content should complement the MR by reinforcing and extending doctor conversations, not function as standalone communication.
*   **Plan journeys, not assets**
Marketers are thinking in terms of connected learning journeys (article → discussion → reinforcement), where each touchpoint, digital or physical, adds value.
*   **Measure impact where it matters**
Success is no longer about content volume or reach alone, but about **quality of engagement and field effectiveness**.

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# Content Maturity for Patient Involvement

In 2025, patient communication in the Indian pharma has clearly matured—from **information dissemination** to **experience-led, action-oriented engagement**.
The focus is no longer only on telling patients,
*"What a disease is, but on helping them recognise risk, seek screening, and act early."*

A defining shift is the move from passive awareness to **participatory health experiences**.

Campaigns increasingly combine *simple, emotionally resonant messaging* with on-ground or digital actions such as screening drives, risk checks, and guided next steps.

This evolution reflects a deeper understanding of patient behaviour: awareness alone does not change outcomes—**facilitated action does**.



Although there are many examples, initiatives such as **#SeeBeyondSugar** by Sun Pharma exemplify this maturity.

#SeeBeyondSugar created strong, relatable on-ground and digital experiences around diabetic eye screening, prompting participants and caregivers to voluntarily share photos, reactions, and learnings on social media.

- **Public participation over brand narration:** By focusing on vision tests and early detection rather than products, the campaign encouraged organic conversations and peer-to-peer sharing, turning public interaction into user-generated amplification.

- **Social proof through lived moments:** Real screening moments, awareness walks, and community engagement became authentic content assets, making the message travel through people's voices rather than brand-led communication  15

## What does this mean for marketers?
- **Design for participation, not just messaging**
  Mature patient communication is built around experiences people can *take part in*
- **Let the action create the content**
  The marketer's role shifts from content creator to **experience architect**.
- **Measure impact beyond visibility**
  Success metrics move from impressions to outcomes

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*Trend 7*

# Artificial Intelligence

## As Business Solution

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# AI in Indian Pharma:

## A Subtle Start in 2025,
## A Defining Force in 2026

*Leading Pharma Companies Are*
*Aggressively Implementing*
***AI solutions***
*to Strengthen*
*Sales and Marketing Operations*

*Trend 8*

# AI for Increased Engagement

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# AI-Driven Micro-Segmentation of HCPs:
## From static doctor lists to living behaviour clusters

In 2025, some pharmaceutical companies began using AI for micro-segmentation—moving beyond basic doctor grouping by specialty, prescription potential, or geography to behaviour-based micro segments that evolve.

**The core shift:** segmentation is no longer about *who* the doctor is, but *how* the doctor thinks, decides, switches brands, and engages with information.
Two doctors with identical prescription volumes can now belong to entirely different segments based on their decision logic and engagement behaviour.

**Hyper-Personalisation of Content**
AI enables more context-sensitive engagement, recognising that one clinician differs from another in how they evaluate evidence, absorb updates, and engage with professional education.

By aligning communication with these preferences and the customer journey stage, brands can ensure relevance without excess.

Regular refreshing of these insights ensures alignment with evolving clinical realities rather than fixed annual assumptions.

**What does this mean for marketers?**
Brand strategy becomes multi-track rather than a single master narrative. Messaging systems replace one-off claims, and success is measured by segment movement—from trial to adoption, and from adoption to loyalty. Engagement becomes the engine of growth, rather than reach alone.

**Mindset shift:**
From
**"What is my core message?" → "Which message works for this micro-segment?"**

# AI in Sales

# AI Sales Managers – Supporting the Field Force

AI Sales Managers are redefining field execution by combining real-time data, predictive intelligence, and moment-to-moment sales support.

**What was earlier driven by intuition is now guided by live insights.**

*Some Examples for which an AI manager was used in 2025*

**1. Intelligent Route Planning**

Field teams spend a large part of their day traveling. AI now optimizes this time.

**Dynamic travel plans:** Real-time traffic, peak hours, and weather inputs

**Priority sequencing:** Visits are reordered based on importance, availability, and expected impact

*Outcome:* More quality calls, less fatigue, and reduced time loss.

**2. On-the-Ground Assistance**

AI supports reps in real time.

**Pre-call intelligence:** Key notes, past interactions, and current sentiment before every visit.

**Smart prompts:** Suggested conversation angles tailored to the customer.

*Outcome:* Higher confidence and better engagement quality.

**3. Centralized Feedback – From Weeks to Minutes**

**Real-time capture:** Voice or text feedback auto-structured on mobile.

**Pattern detection:** Early signals on competitors, objections, or supply issues.

**Central repository:** One searchable intelligence hub.

*Outcome:* Faster decisions and quicker course correction.

**4. Coaching, Forecasting, and Scale**

**Personalized coaching:** Micro-tips and performance benchmarks.

**Unified dashboards:** Sales, travel, sentiment, and forecasts in one view.

**Consistent execution:** Same quality support across all geographies.

*Outcome:* Scalable performance, not manager dependency.

**What does this mean for Marketers?**

- Brand strategies can be **translated into daily field actions**, not just campaigns.
- Messaging can be **tested, refined, and optimized in real time** using field intelligence.
- Launches, competitive responses, and positioning become **faster, sharper, and evidence-led**, closing the gap between brand intent and on-ground reality.

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*Trend 10*
# AI Chatbots

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# AI ChatBots – Improving HCP and Patient Satisfaction

In 2025, chatbot deployment shifted from experimentation to execution, with many Indian pharma companies actively using HCP and patient bots as stable, high-engagement channels that deliver measurable satisfaction and operational gains. Chatbots moved from pilots to practical, everyday tools.

**1. Bots for HCPs – Speed, Access, and Cognitive Relief**
**Primary role:** Reduce friction in information access.

**How did they evolve in 2025?**
- Instant access to medical information, guidelines, and updates.
- CME registrations, reminders, and post-event content via WhatsApp.
- Quick clarifications without waiting for a representative visit.

*Outcome:* Faster decision-making, reduced interruptions, and higher satisfaction with digital engagement—without adding promotional noise.

**2. Bots for Patients – Continuity, Confidence, and Care Support**
**Who they serve:** Patients and caretakers
**Primary role:** Improve experience beyond the consultation.

**How did they evolve in 2025?**
- Appointment booking, reminders, and follow-ups
- Medication reminders and lifestyle nudges for chronic conditions
- Disease education in regional languages with an empathetic tone

*Outcome:* Lower anxiety, better adherence, and a feeling of being "continuously supported," not abandoned after the prescription.

**What does this mean for Pharma Marketers?**
- Chatbots are no longer IT tools—they are **brand touchpoints**
- Experience design matters as much as content accuracy.
- Marketers must plan **two distinct chatbot journeys**, aligned to the brand promise.
- Chatbot data now provides insights into unmet needs, confusion points, and engagement gaps.

In 2025, chatbot-led experience became a **new pillar of pharma brand building**, not just a service add-on.

## About Brand Innerworld

**Brand Innerworld** is an AI-led brand building consultancy and training firm specializing in the pharmaceutical and healthcare sectors. The firm partners with organizations to strengthen brand potential through strategic brand consulting, AI-enabled brand building workshops, and capability-building programs for marketing and commercial teams.

## About the author

### Gauri Chaudhari

Gauri is the founder of Brand Innerworld and brings over 30 years of experience in the pharma and healthcare sectors. Her expertise spans a wide spectrum of healthcare branding, including prescription medicines, OTC products, hospital services, digital platforms, medical devices, and surgical brands.

She is also an author of the Amazon bestseller, The Perfect Pill: 10 Steps to Build a Strong Healthcare Brand and Brand Building Breakthrough with AI.

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