

**A science-led global  
healthcare company  
with a special purpose**

Analysts Meet  
28 September 2020

# Our corporate story



## Who we are

We are a science led global healthcare company with a special purpose to help people do more, feel better, live longer



## What we do

We aim to bring differentiated, high quality and needed healthcare products to as many people as possible, with our global business, scientific and technical know-how and talented people



## How we do it

Everyone at GSK is focused on 3 priorities:

Innovation

Performance

Trust



## Why we do it

To help people do more, feel better, live longer.

# GSK India in Emerging Market



The Indian domestic pharmaceutical market is the 3<sup>rd</sup> largest, with the highest incremental sales (excl. China), amongst emerging markets

**#1**

in Dermatology therapy area

**#1**

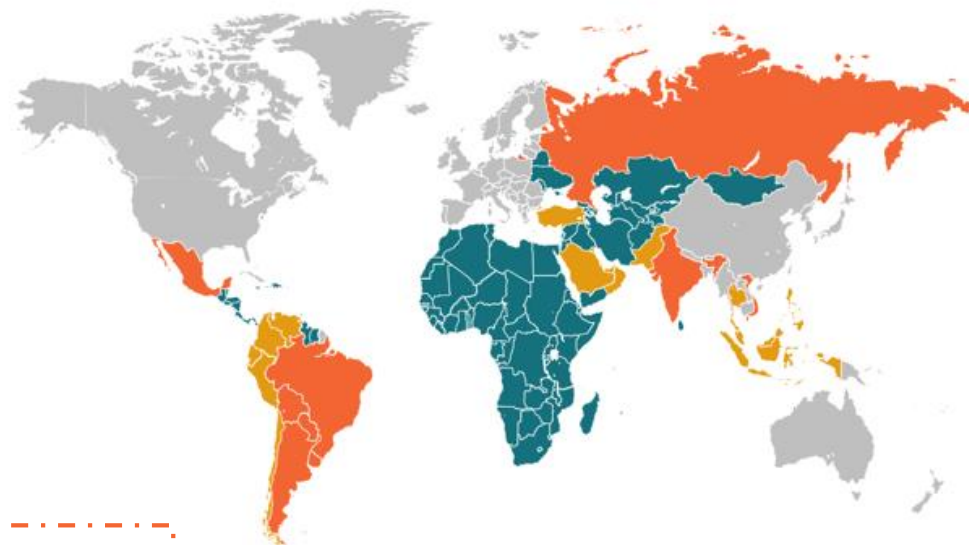
in vaccines market

**#2**

Amongst MNCs in pharmaceuticals (by value)

**#4**

in terms of volume in IPM



**Largest** Rx market for GSK Emerging Markets

**Second** largest overall for GSK Emerging Markets

# Focused key actions to be executed flawlessly



Grow focus brands that cont. majority to business



**6** key specialties cont. **90%** of prescriptions



**120,000** key retailers → to maintain **60%** of business



Keep **growth momentum on Nucala, Menveo**



Employee safety and well being

# GSK Vaccines consumer awareness campaigns creating an huge impact on need of vaccination



Improved confidence of HCPs, Sales force and Consumers on Vaccination and GSK's leadership in Vaccination space

## World Immunization Week Awareness Campaign



**Reach: 2M, Impressions: 6M**  
(24<sup>th</sup>-30<sup>th</sup> April 2020), parents aged 25-40yrs

## "Timely Vaccination" campaign



**Reach: 80M, TV Impressions: 1Bn**  
(Launched June, 8 weeks campaign) 0-3/5 years

## 3 in 1 vaccination awareness campaign



**Views: 1M, Impressions: 130M**  
(Launched march & continue till year end) Pregnant women (2nd & 3rd Trimester), parents aged 25-40yrs

## 6 disease combination vaccination



**Views: ~0.2M, Impressions: 10.2M**  
(Launched march & continue till year end) last trimester + 0-1 year baby



Social media



Parenting apps



Digital News



Our long-term priorities  
Innovation



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## Our global response in the fight against Covid-19

We are using our science,  
technology, portfolio and  
resources to support  
development of products  
for prevention and treatment  
of COVID-19



COVID-19 virus

## Our India response in the fight against Covid-19



### Employee health

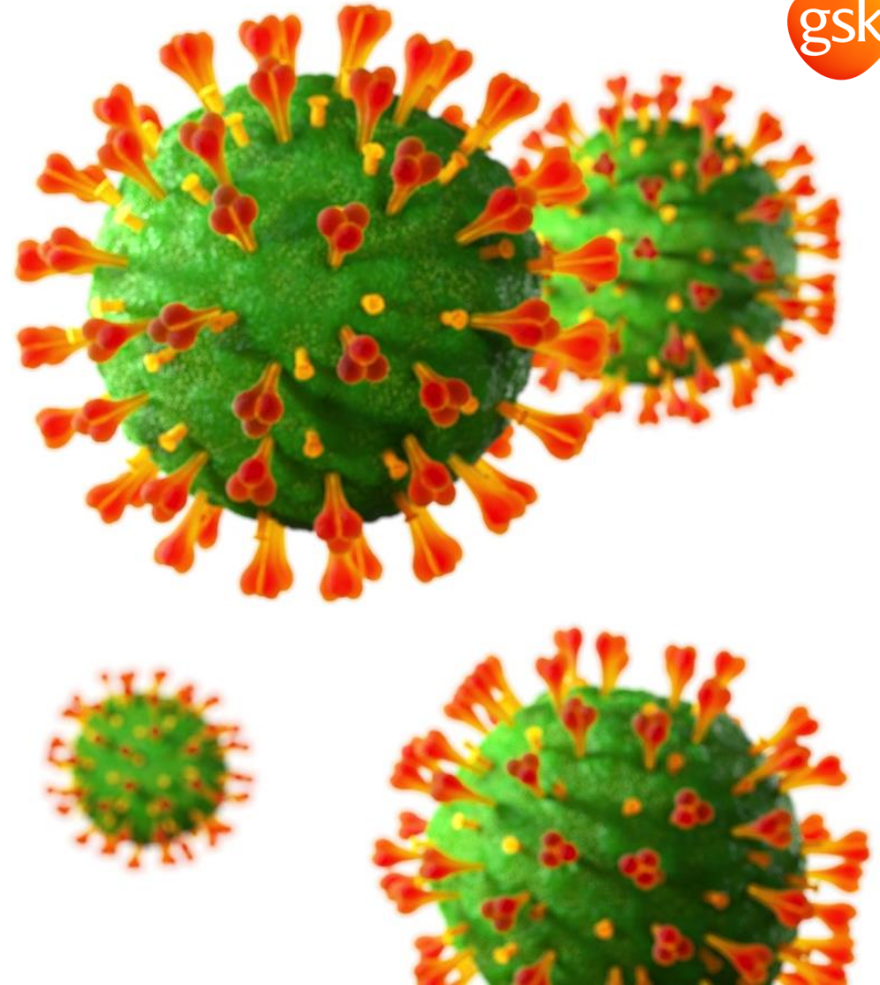
- PPE Kits made available to all
- Resilience and wellness trainings

### Business continuity

- Site fully operational even with reduced workforce
- W&D well managed
- Digital connect with doctors and retailers

### Social responsibility

- Matched employee contributions to PM Cares Fund
- Product donation and PPE kits to MoHFW and BPPI
- Community support through CSR partners

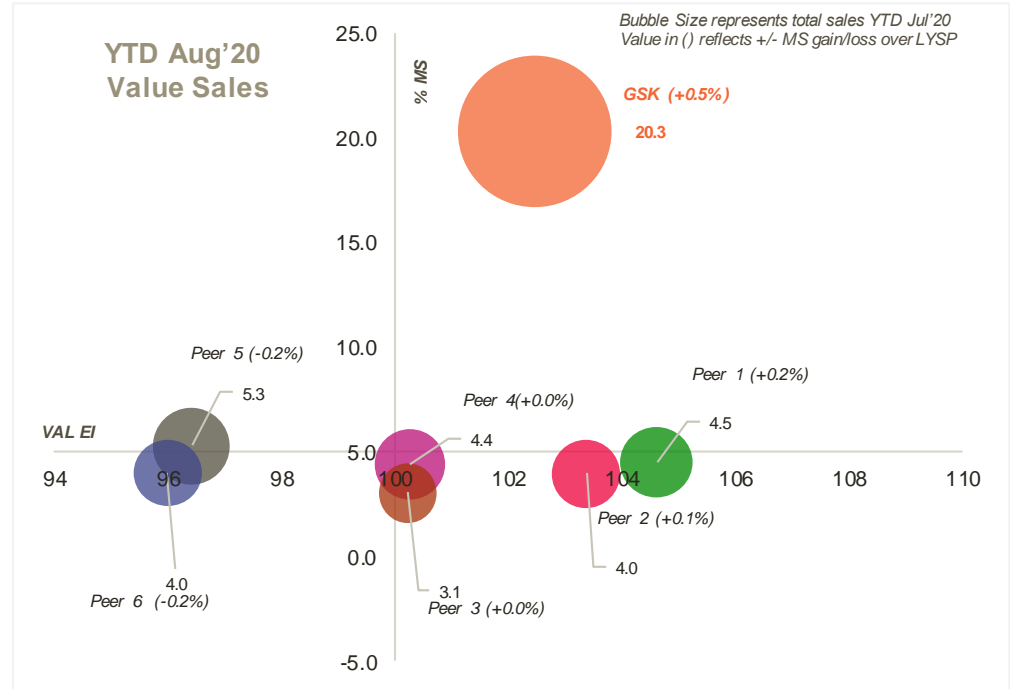


# Performance



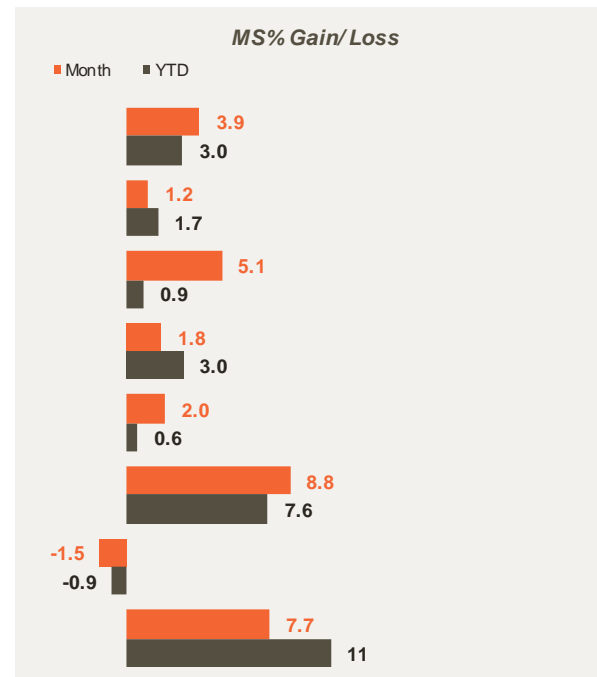
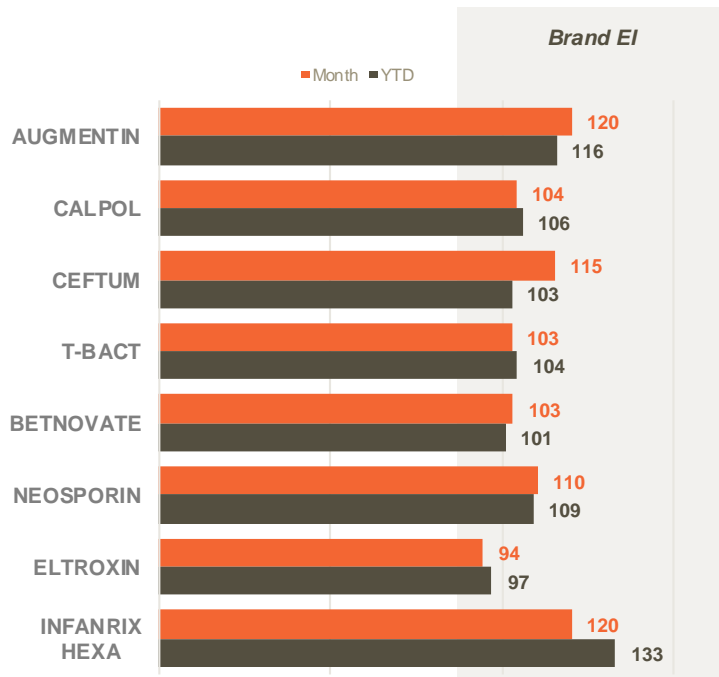
GSK Rx strengthening its dominant position in represented market, further gained market share of **0.5%**

highest compared to competition on YTD Aug'20 vs. same period last year





# Key brands growing faster than market with MS gains



# Overcoming challenges during pandemic induced lockdown



## Digital Outreach

- Ensured digital connect with all HCPs
- Digital payment management to ensure uninterrupted supplies



## Cash Management

- Daily cash forecasts
- Movement to digital collections platforms
- Healthy operating cash flows through the period



## Cost Optimization

- Reassessing costs with new ways of working
- Zero based budgeting
- Suspension of all discretionary spends

Our long-term priorities

# New Assets



Approved

TRELEGY



Filed



mepolizumab

Liquid

Pediatric Indication

Our long-term priorities  
Trust

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## Reliable supply chain

>90% OTIF

## Engaged workforce

Highest engagement scores of >94% in culture survey

Active listening and lets talk sessions

## CSR

Over a million lives  
positively impacted



Our culture

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## Living our values and expectations

Throughout the COVID-19 lockdown, 60% of our workforce achieved 100% production, ensuring continuous supply of our existing products.

Nearly 4,000 employees moved to working from home, adapting quickly to new ways of working, focused on serving our patients and consumers.





# India's exciting future; Fantastic growth opportunities, New launches and Innovation

## Classic and Established Products

Grow Core Primary care &  
Derma assets supported by  
strong CTC strategy

## Vaccines ambition

Expand classic vaccines  
Launch New assets

## New launches

Approved and ready to  
launch

Performance Culture | Employee safety & Engagement



# Thank you

Q&A