OVERVIEW OF
INDIAN PHARMA & MEDICAL DEVICES MARKET

Investment, Technology Promotion & Energy Security Division

Ministry of External Affairs

New Delhi

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verview of Indian Pharmaceutical Sector

US$ 30 Billion plus turnover [50% domestic and 50% exports].

CAGR of around 14% since last 5 years.

Around 10,500 registered manufacturing units.

- 2500 bulk drug manufacturing units and
- 8000 formulation units.

Production of medicines under almost all therapeutic categories like Anti-infective, Cardio-vascular, Anti-cancer, Anti-AIDs, Gynaecology, Neurological, Dermatology, Gastro-intestinal, Respiratory, Analgesics, Anti Diabetic, Vitamins/ Minerals/ Nutrients etc.

ey driving factors

- Abundance of high skilled workers, low production costs and high quality manufacturing.
- Industry dotted with domestic and MNC players.
- Indian Pharma market is primarily of generic medicines except the medicines for some of the 2nd and 3rd stage diseases like cancer, HIV, Hepatitis etc.
- Top Indian Pharmaceutical Companies are:

  Cipla, Sun Pharma, Wockhardt, Lupin, Dr. Reddy's Labs, Jubilant Lifesciences, Cadila Healthcare, Biocon, Glenmark, Stride Arcolabs, Piramal Healthcare, Torrent, IPCA Labs, Orchid Pharma, Claris Lifesciences, Panacea Biotech, Ind-Swift etc.

ulk Drugs

Nearly 2500 bulk drug manufacturing units

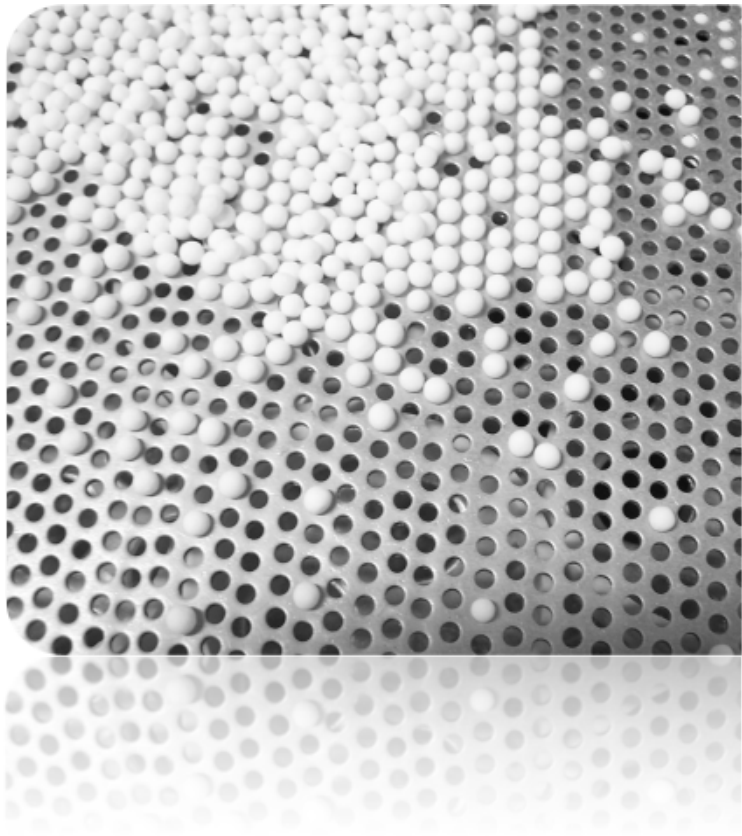
The estimated turnover is around US$ 12 Billion

CAGR of Bulk drugs industry @ 16.98% in the last 3 years.

India has a market share of about 10% of the global bulk drugs market which is @ US$ 110 Billion.

Over 30% of Drug Master Files (DMF) approvals by USFDA were from India.

The bulk drugs produced in Indian market fall under 21 major therapeutic classes with Antibiotics constituting more than 50% of the total production.



lobal Context

Ranked 3rd globally in volume and 14th in value.

Recognized globally for high quality medicines at affordable prices.

India supplies 10% of total global Pharmaceutical production including 20% of total volume of global generics and 30% of the world requirement of Anti-HIV drugs.

India has a share of 2.4% in terms of value in global pharmaceutical market.

Truly international with leading international manufacturers competing in Indian domestic market and several Indian pharma companies having a significant presence in the international market, especially in the generic segment.

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xports

Exports worth US$ 15 Billion; CAGR of 19% during last 5 years.

Exports to around 200 countries in the world

Top five exporting destination countries are USA, Russia, Germany, Austria and UK with USA alone accounting for almost 20% of total export.

Major therapeutic categories of export are anti infective, anti asthmatic , anti hypertensive, anti-AIDS etc.

Largest US-FDA compliant plants outside USA (more than 262 including APIs)

Nearly 1400 WHO-GMP approved plants, 253 EDQM approved plants.

Indian plants also have approval of TGA in Australia, MHRA and Health Canada.

esearch & Development

The global average R&D expenditure around 8% of total sales but the New Chemical Entities pipeline is getting thinner.

Indian companies have been increasing their research expenditure, and now invest around 4.5% of their sales in pursuing R&D.

The Government has taken several steps to strengthen R&D in Pharmaceutical and Bio-Pharmaceutical Sector through fiscal incentives and streamlining the procedures and regulations of development of new drugs and new drug molecules.

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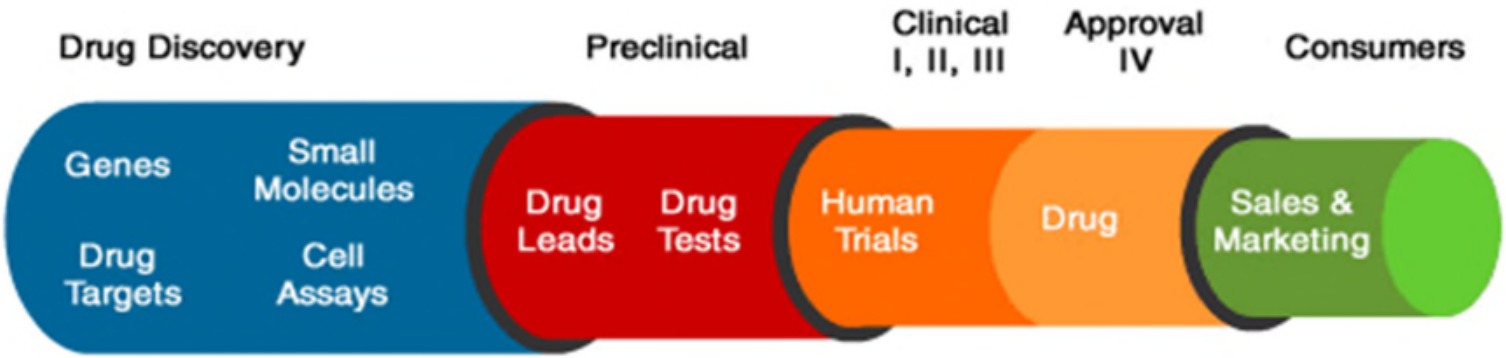
esearch & Development

India is being recognized as a strategic partner in drug discovery value chain because of:

- Cost competitiveness: Cost of developing a new molecule in India is less than 30% of the cost in the US.
- Edge in reverse engineering for generic products and global ANDA filing.
- Well developed chemistry R&D and manufacturing infrastructure.
- Large, diverse, therapy-naïve pool of patient population in all kind of acute/ chronic disease segments: ideal for clinical research.



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Human Resource

Indian Pharmaceutical Industry is providing direct jobs to nearly 1mn people and is likely to double by 2020.

The present status of various colleges offering courses at various levels in Pharmaceuticals is as per the table given below:

1	Total no of pharmacy colleges	1162
2	Number of B. Pharma colleges	848
3	Number colleges/Institutes offering Masters and PhD in pharmaceuticals area.	191
4	Number of B Pharm students per year in pharma	51716
5	Number of Masters and Ph.D students per year in pharma	5648

uman Resource

Department of Pharmaceuticals established National Institute of Pharmaceutical Education & Research (NIPER) in Mohali, India as a “Institute of National Importance” in 1998 to nurture and promote quality and excellence in Pharmaceutical Education and Research.

NIPER offers Masters programs and PhD programs in 15 streams. The laboratories at NIPER are fully equipped with modern facilities and are of international standards.

Further, seven new National Institutes of Pharmaceutical Education and Research (NIPER) were opened in 2007 and 2009.

Three new NIPERs have been proposed in the states of Maharashtra, Rajasthan and Chhattisgarh.

edical Devices

Market size of Indian Medical Devices Industry - US$ 6 billion.

Domestic production confined to disposable equipments & consumables and electronics & equipments.

India has self-reliance and also exports devices like Medical X-rays, Syringes, Gloves, Needles, Intraocular Lens, I.V. Cannulas /Catheters, Contraceptives, Surgical Blades etc.

Leading export destinations are USA, Germany, Japan, China, France.

Recognising the potential of Indian Medical device Industry, the Government is coming up with schemes to encourage Indian industry to produce high-tech medical devices.

The Government is also coming up with a new set of regulations for medical devices.

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THANK YOU