

# India Pharmaceutical Industry Research and Forecast to 2016

<https://marketpublishers.com/r/I6081E03EFAEN.html>

Date: April 2012

Pages: 65

Price: US\$ 595.00 (Single User License)

ID: I6081E03EFAEN

## Abstracts

The report titled “India Pharmaceutical Industry Research and Forecast to 2016” offer detailed analysis on the country’s bulk and formulations market which is sub-segmented into OTC, prescription drugs and generic drugs. It analyses major bio-pharmaceutical market segments, top therapeutic categories and traditional medicine market (herbal drugs, ayurvedic and homeopathy). Report also include SWOT analysis, major driving forces, industry growth barriers, Opportunities, Regulatory structure, Macro economy factors and Political environment of the country. Report also profile major players (domestic and international) and forecast industry and its segments’ growth.

Generic drugs have a dominant position in the rapidly expanding Indian pharmaceutical industry. India is among one of the largest bulk drugs exporters but represent only one fourth of the total pharmaceutical market while formulation drugs account for the three fourth shares. Domestic market has showcased resilience during the economic crisis and has recorded a steady growth. Rising aging population indicates compelling opportunity for drug manufacturers to focus on bone health, dietary supplements and dementia and other age related diseases. Direct marketing is in its development stage in the country while multi level marketing companies are trying hard to understand spending behavior of middle class population in India.

Urban areas accounted for 67% of the OTC demand even though a large Indian population resides in the rural areas which indicate a huge potential for further growth. In rural areas, cold & cough, pain killers and digestive medicine demand is mounting while demand for baby food, skincare and sanitizing products is almost negligible. Vitamins and minerals is a rapidly growing category which has become a fifth largest therapeutic segment in 2011. India is among one of the largest herbal raw material and

finished herbal medicines exporters. In terms of global export of herbs, India account for 9.10% of the market share. There is also a rise in number of homeopathy medical colleges in the country with the strong government initiatives.

Biopharmaceutical sector is expected to witness double digit growth led by major developments in therapeutic segment. Vaccines market (human and animal) is enjoying a continuous growth, dominated by human vaccine segment which accounted for more than three fourth of the market. In-licensing deals are expected to increase in domestic market to take the benefit of the lower R&D cost and manufacturing units of the domestic generic companies. The generic segment is expected to grow at a faster rate from 2012 onwards although industry may witness price erosion leading to reduced generic player's profit margin.

### **Key Findings:**

There has been a consistent growth in the total healthcare spending in India with an estimated 4.20% of GDP spent on healthcare through 2008-10. Pharmaceutical industry contributed 1.71% of GDP in 2011.

Patented drugs account for 9.60% of the total demand which is expected to reach 13.30% by 2014.

Pharmaceutical industry in India is witnessing a rapid expansion at a CAGR of 10.56% from 2006-2011. Domestic pharmaceutical market will grow by 12.96% in 2012 and will reach USD 14.99 billion.

In 2011, pharmaceutical industry (domestic, import and export) by value reached USD 27.40 billion, growth of 13.22% from previous year and the domestic market grew by 15.69% to USD ~ billion. The export of pharmaceuticals, drugs and fine chemicals combined grew 16.07% to USD ~ billion in 2010.

In 2011, biopharmaceutical sector contributed almost 62% in the Indian biotech industry reaching to USD ~ billion. In 2011, vaccine segment (human and animal) witnessed growth of 10.21% to USD ~ million.

In 2011, diagnostics sector reached USD ~ million from USD ~ million in 2010 at a growth rate of 19% whereas therapeutics segment grew by 21.50% in 2011 to USD ~ million, compared to USD ~ million in 2010.

The bulk drug industry revenue reached USD ~ billion in 2011 from USD ~ billion in 2010, registering a growth of 6.41%. This segment is further expected to grow at CAGR of 14.80% (2011-2016)

The Indian generic drugs market is projected to grow at a CAGR of around 11.13% during FY'2011-2016 from current 12.69% (2006-2011).

The sales of OTC drugs has grown from USD ~ billion in 2006 to USD ~ billion in 2011 at a CAGR of 7.72%.

The herbal supplements market in the country reached to USD ~ million in 2011, a growth of 6.44% from previous year and is further expected to grow at a CAGR of 2.44% to reach USD ~ million by 2015.

## Contents

### **1. INDIAN HEALTHCARE INDUSTRY**

- 1.1. India Pharmaceutical Industry Snapshot
- 1.1. Market Size
- 1.2. Biopharmaceuticals and Classification
  - Vaccines
  - Diagnostics and therapeutics
- 1.3. India Pharmaceutical Market Forecast

### **2. INDIA PHARMACEUTICAL MARKET SEGMENTS**

- 2.1. Bulk vs Formulation Drugs

### **3. CLASSIFICATION ON THE BASIS OF API MANUFACTURING SEGMENTS**

- 3.1. Generic Drugs
- 3.2. Over the Counter Drugs (OTC)
  - 3.2.1. Top Therapeutic Categories
    - 3.2.1.1. Traditional Medicine Market
    - 3.2.1.2. Herbal Drugs
    - 3.2.1.3. Ayurvedic Medicine
    - 3.2.1.4. Homeopathy Medicine

### **4. GROWTH DRIVERS**

### **5. OPPORTUNITIES**

- 5.1. Rising Demand for Vitamin and Dietary Supplements
- 5.2. Rising Diabetes cases and Medication Demand
- 5.3. Medical Tourism Benefiting Indian Pharmaceutical Industry

### **6. SWOT ANALYSIS**

Strengths  
Weaknesses  
Opportunities  
Threats

## **7. GROWTH BARRIERS**

## **8. RECENT PHARMACEUTICAL INDUSTRY M&A'S**

## **9. REGULATORY STRUCTURE**

Patent

FDI Regulations

## **10. COUNTRY ANALYSIS**

10.1. Key Findings

10.2. Political Environment

10.3. Macro-Economic and Industry Indicators

10.3.1. GDP Enabling Growth of Pharmaceuticals

10.3.2. Import/Export

10.3.3. Growth Driven by Rising Population

## **11. INDUSTRY COMPETITION AND DOMESTIC PLAYERS PROFILING**

11.1. Competitive Landscape

11.2. Domestic Vs International companies

## **12. APPENDIX**

12.1. Abbreviations

12.2. Definitions

12.3. Research Methodology

Data Collection Methods

Approach

Variables (Independent)

Multi Factor Based Sensitivity Model (SPSS Analysis)

Final Conclusion

12.4. Disclaimer

## List Of Figures

### LIST OF FIGURES

- Figure 1: Indian Pharmaceutical Industry Value Chain
- Figure 2: India Pharmaceutical Industry Distribution Structure
- Figure 3: India Pharmaceutical Industry by Value (2006-2011)
- Figure 4: Domestic Pharmaceutical Market, Retail Sales by Value (2006-2011)
- Figure 5: Bio-pharmaceuticals Market in India by Value (2006-2011)
- Figure 6: Bio-pharmaceuticals Product Classification in % (2011)
- Figure 7: Vaccine Demand in India by Value (2006-2011)
- Figure 8: Domestic Pharmaceutical Market by value (2011-2016)
- Figure 9: India Pharmaceutical Industry Forecast (2011-2016)
- Figure 10: India Pharmaceutical Industry Segments in 2011
- Figure 11: India Generic Drug Market Size by Value (2006-2011)
- Figure 12: OTC Drugs Demand by Value (2006-2011)
- Figure 13: OTC Product Demand by Categories in 2011
- Figure 14: India Herbal Supplements Market by Value and Forecast (2006-2015F)
- Figure 15: Healthcare Expenditure in India (2006-2015)
- Figure 16: Indian Rural and Urban Population in Million, 2006-2015
- Figure 17: Total R&D Expenditure of the Indian Pharmaceutical Industry (2006-2016)
- Figure 18: Vitamin and Dietary Supplements Market by Value and Forecast (2006-2011E)
- Figure 19: Number of Diabetic Patients in India in Million, FY'2006-2016
- Figure 20: Number of Total Medical Tourists in Thousands and Medical Tourists Receipts in USD Million, 2006-2010
- Figure 21: India's GDP at Current Prices in USD Billion, 2006-2015
- Figure 22: India's Population in Million, 2006-2016

## List Of Tables

### LIST OF TABLES

Table 1: Major Hospital Chains in India

Table 2: Ranking of Leading Bio-pharmaceutical Companies (2010-11)

Table 3: Diagnostics and Therapeutics Demand by Value (2009-2011)

Table 4: Number of Bulk and Formulations Manufacturing Units in India in 2010

Table 5: Pharma Special Economic Zone (SEZ) in Maharashtra

Table 6: Famous Medication for General Diseases

Table 7: India AYUSH products Export by Value (2006-2010)

Table 8: India Herbal Products Export by Value (2006-2009)

Table 9: Labor Participation Rates by Gender and by Age Group in India, 2000 and 2008

Table 10: Drugs and Pharmaceuticals FDI Equity Inflows (2009-2011)

Table 11: Cumulative FDI Inflow (Apr 2000-Feb 2011)

Table 12: Leading Companies R&D Expenses as a % of Sales (2008-2010)

Table 13: Recent M&A's in Indian Pharmaceutical Industry, 2010-2011

Table 14: Regulatory Authorities and Guidelines

Table 16: India Economy (2010-2012)

Table 17: Export/Import Statistics (2006-2010)

Table 18: Drugs, Pharmaceuticals and Fine Chemical Exports in India, Monthly Statistics (2009 & 2010)

Table 19: Imports of Medicinal and Pharmaceutical Products (2006-2009)

Table 20: Income Distribution among Households in thousands in India, 2009-2012

Table 21: Leading Domestic Pharmaceutical Companies, Financials and Key Strategies

Table 22: Leading International Pharmaceutical Companies, Financials and Key Strategies

Table 23: Correlation Matrix of the India Pharmaceutical Industry

Table 24: Independent Variables

Table 25: Correlation Matrix of the India Pharmaceutical Industry

## I would like to order

Product name: India Pharmaceutical Industry Research and Forecast to 2016

Product link: <https://marketpublishers.com/r/l6081E03EFAEN.html>

Price: US\$ 595.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/l6081E03EFAEN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970