

India Pharmaceutical Industry Research and Forecast to 2016

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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.

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