

# Looking at Offshoring in the Pharmaceutical Industry

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## Abstracts

The organic spread of pharmaceutical industry worldwide has necessitated taking steps beyond only export of drug lifecycles across time based zones to development in those countries itself in order to capitalize on the opportunities present in these countries whether in terms of knowledge resources or as financial capabilities. These opportunities exist in terms of manufacturing API's or intermediate and final stage drugs. Offshoring is helping these companies develop application specific drugs, share knowledge and transmit the benefits of such research across the globe irrespective of borders.

Manufacturers are turning to labor intensive emerging markets like India and China for fulfilling these additional capacity requirements. Such offshoring of R&D as well as production efforts are guided by pressures of rising costs, market competition, regulatory allowances, intense generic proliferation or deriving better efficiencies. The route to entering such markets by these global majors are being explored in India and China by acquiring local companies or setting up wholly owned R& D subsidiaries.

While Pharma revenue growth in the seven major pharmaceutical markets has begun to slow, with five percent annual growth in 2004–2005, growth in the BRIC (Brazil, Russia, India and China) markets was significantly higher at 22%. Consequently, in addition to acting as key sights for off-shoring drug development and manufacturing, India and China are increasingly becoming key targets for Western companies aiming to expand their global pharmaceutical revenues.

Aruvian's R'search's report – Looking at Offshoring in the Pharmaceutical Industry - is a detailed analysis of the recent practice of “offshoring” which has been initiated in the pharmaceutical industry globally and the reasons behind the need for and benefits derived from offshoring by these companies.

The report presents a demarcation of the industry and profiles the industry in various marketing dimensions as the segments active in the industry; the competitive forces at play and an outlook for the market. The report explains the basic concepts of Offshoring as implemented in the pharmaceutical sector by analyzing the value chains which have materialized globally pushing employment scenarios in emerging and growing economies.

The impact of Offshoring as a practice cannot be understood without a complete study of Indian and Chinese knowledge markets to the global pharma chains as explained in this report along with the challenges or barriers faced by inflow of offshoring pharma investment by R&D routes into these markets.

The report also provides an in depth explanation of the pharma manufacturing process as is prevalent in the leading markets wherein pharma companies are straddled with decisions to manufacture biologics or secondaries in offshoring bases and the challenges expected in these markets towards such initiatives.

The report is a complete guide on Offshoring as being implemented in the current scenario for the pharmaceutical industry and the future outlook for growth of off shoring opportunities which can lead to mutually acceptable gains for the investors and the suppliers in the pharma industry.

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