

India Pharma Outlook 2015: Accelerating Growth to the Next Level: Moving up the Value Chain Beyond Generics

<https://marketpublishers.com/r/IFE7F930BA6EN.html>

Date: February 2015

Pages: 109

Price: US\$ 2,000.00 (Single User License)

ID: IFE7F930BA6EN

Abstracts

Domestic sales improved in 2014, recovering from the slump in the 2013 caused by the market's reaction to the new drug pricing policy. In 2015, growth is expected to continue to be healthy, as the momentum continues and improving economic growth allow more spending on healthcare. Sun Pharma acquisition of troubled Ranbaxy helped it to become the leading Indian pharma company in terms of domestic market share. Sun's in-licensing of biologics from Merck also indicates, Indian companies willingness to advance its pipeline towards upper value chain. Though, US market remains the largest market for India generic exports, it is witnessing a slowdown in product approvals and channel consolidation which has impacted overall pricing and margin for the industry. The increase in audits by US FDA staff on the Indian plants of both multinationals and Indian companies have led to an increased number of issuance of warning letters. Indian Pharma companies are trying to diversify into other markets such as Brazil, Mexico, Venezuela and also in some East European markets to lower this growing dependency on the US.

Department of Pharmaceuticals (DoP), Ministry of Chemicals and Fertilizers, Government of India under 'Make in India' program has decided to declare the year 2015 as 'Year of Active Pharmaceutical Ingredients (API).' Under the 'Make in India' initiative, it is expected that the government will introduce many industry-friendly policies and incentives to give a major thrust to the growth of Indian bulk drug industry to make it a formidable force globally. State government of Telnagana has already announced many incentives for the bulk manufacturing units.

Indian companies are taking center stage in Complex Generics at US and EU markets. In Bio-similars, Indian companies will have perhaps the largest basket aimed at

Emerging Countries in 2015-20 and later for Developed countries. Though few but is the beginning of NCE/mAb development by Indian companies is a sign of Indian Generics moving up in the chain. Biopharma/ biotech companies in India, S. Korea, China may have significant advantages of low-cost manufacturing, colossal markets, and healthy government support over potential peers from other regions. The cost barriers in the biosimilar market lead regulated marketed giants to tie up with Asian companies to gain access to these advantages and hedging their bets through a joint-venture strategy.

Contents

AURBINDO PHARMA - RECOVERY SO FAR, SO GOOD

Strong Presence in US market – Channel consolidation has no Impact so far

Acquisition of commercial operations in Western Europe from Actavis

Domestic Business

Antiretroviral (ARV) Business

Table 1: Global Regulatory Filings

BIOCON - GLOBAL PARTNERSHIPS AND CREATING FURTHER VALUE OF CRAMS –FUTURE DRIVERS

Near term Growth Drivers

Long term growth Drivers

R&D Partnership Update

CADILA - NCE, BIO-SIMILARS, TRANSDERMAL AND COMPLEX GENERICS

US remains the key growth driver

NCE/NBE pipeline

Table 1: Key transdermal products and timelines for filing and approval

Table 2: colon targeted drugs –near to medium term growth driver of Cadila Healthcare

CAPLIN POINT - DEBT FREE COMPANY WITH STRONG MANAGEMENT – LATIN AMERICA INVESTMENT STRATEGY WILL PROVIDE CONSISTENT GROWTH

Formulation capabilities:

Financial status:

Export business:

Contract Manufacturing

CIPLA - FRESH LEADERSHIP TO START DELIVERING RESULTS SOON!

Solid Base to Enter 'Front-End' Marketing In Overseas Markets

Capabilities in the Respiratory Area

Initiatives to Bring Value to the Society Continue

Table 1: Respiratory coverage

Table 2: Strong manufacturing to cater to global markets

Table 3: Wide technology platform base

Table 4: Wide technology platform base

DISHMAN - HIGH POTENT/ONCO CRAMS TO API: WILL THESE STRATEGIES WORK?

India CRAMS – Challenges Faced

New Initiative At Business Segments

Figure 1: Crams business – value chain

Table 1: Bulk API products - highly potent

Table 2: Bulk API products

DR. REDDY'S - ONCO GENERICS AND COMPLEX FORMULATION ARE NEW CATALYSTS FOR GROWTH

Rich Pipeline with 'difficult to make' products

Positioned Well to participate in Biosimilars opportunities

Russia/CIS – Momentum Continues:

Figure 1: Varieties of formulations in pipeline

Table 1: Expected new launches in next three years

Table 2: Select products launched by Dr. Reddys in past three years

Table 3: Leadership products in Russia

Table 4: Growth of sales in Russia

GLENMARK - MATURING NBE/NCE PIPELINE VISIBILITY TO INCREASE IN THE NEXT TWO YEARS

Buisness Segments

Junivia Case

India formulation

USA Formulation

Africa, Asia and CIS Region (ROW)

Europe Formulation

Latin America

API Business

Domestic Business

Further Value Creation

R & D pipeline Update

JUBILANT LIFE SCIENCE - INTEGRATED CRAMS BUSINESS - FINANCIAL RESTRUCTURING UNLIKELY SOLVE KEY ISSUE

Pharmaceutical Business De-growth to Impact Margin
Life Science Ingredients margin is not very attractive!
Geography wise Business and Long term Outlook

LUPIN - A TRUE GLOBAL INDIAN COMPANY – WILL ENTER NEW PHASE OF GROWTH

Solid Foundation in USA

Japanese success story is likely to be continued:

Increasing investments in R&D are strengthening the foundation:

Chart 1: Lupin: business split for fy 03/14

Table 1: upcoming ftf opportunities

Annexure 1: strategic initiatives and alliances in fy 03/14

NATCO - LEVERAGING CHEMISTRY, FORMULATION AND IP STRENGTHS – FOR US AND INDIA MARKETS

New Market Entry

Leading oncology player in domestic market

API Exports

NCE pipeline

CML Market position

Key Oncology in Domestic Market to Value in Coming Years

ORCHID - CDR IN PLACE BUT LOST CONFIDENCE ON MANAGEMENT

US Formulation Business, the Key Growth Driver, Strategy still a question?

From the ANDAs list, we see four products, where Orchid has meaningful opportunity –

DEPENDS ON THE PARTNER IT CHOOSES:

Facilities Post Hospira deals:

Table 1: Cephalosporin API Us DMF List

Table 2A: Us Antibiotic Consumption In Volume

Table 2B: Cephalosporin's Consumption In Volume

Table 3: Key Andas And Competition

PANACEA BIOTECH: CDR APPROVED: TURNAROUND EXPECTED FROM FORMULATION BUSINESS

Panacea has shown confidence in rebuilding the business through research and strategy

Business Segments Review

Indian Market Position

International Markets Updates

Strategic Alliances

Joint Venture Partnerships with Global Companies

Panacea Biotech Research Capabilities

Formulation Platform technologies Developed

Manufacturing Facilities- Regulatory Approval

WHO and UNICEF Vaccine Business Update

Table 1: NDDS Pipeline

SHILPA MEDICARE: A LEADER IN ONCOLOGY API, EXPANDING INTO NON-ONCO, PEPTIDES AND COMPLEX FORMULATIONS – US MARKET THE NEXT TARGET!

Acquisitions so far

Table 1: Select Key Oncology API And Their DMF Status

Table 2: Select Non-Onco API And Their DMFStatus

Table 3: Select API Under Development

STRIDE ARCOLAB: HONEYMOON PHASE ON- POST MERGER WITH SHASUN

Complementary Business- Shasun and Strides

Malaria and HCV opportunity are future growth drivers--

Notable acquisitions with Stride Arcolab

Biotech/Biosimilar- Long term Drivers- Stelis Biopharma

Hedging Risk in biosimilar/biologics

SUN PHARMA,: LARGEST INDIAN GENERIC COMPANY VENTURING INTO BIOLOGIC INNOVATION

Domestic market – balanced portfolio, sustainable base

Leadership in Domestic Oncology Market is Likely to be Maintained:

Overseas Market Business

Rest of the world formulation business:

Acquisition & Collaboration and its impact on the company's growth

Table 1: Domestic Chronic Disease Focused Portfolio

Table 2: Year Wise Approvals In The Us

Table 3: Therapy Wise Approvals In The Us

Annexure 1: History Of Creating Value By Executing Value Assets

CONNEXIOUS - CONNEXIOS HAS HAD A BUMPY RIDE LIKE MOST RISING STARS/DRUG DISCOVERY COMPANIES IN THE BIOTECH SECTOR

Technology Platform

Therapy Focus—Diabetes/Metabolic Disorder and Non Alcoholic Steatohepatitis (NASH)

Key Milestones

Figure 1: PRODUCTS IN PIPELINE- DIABETES

Figure 2: PRODUCTS IN PIPELINE FOR NASH

Figure 3: OTHER PROGRAMS

Appendix 1: Network Biology Platform for Diabetes and fibrosis

Appendix:2 Novel GPR40 agonist

CNX-103: Whole body improvement of metabolic health

Table 1: Differences Between G-Protein Coupled receptor agonists

Table 2: Pipeline Of Gpr Agonist For Treatment Of Type 2 Diabetes

CELLWORKS - CELLWORKS (CW) HAS EVOLVED FROM A SERVICE BASED COMPANY TO A DRUG DISCOVERY /DEVELOPMENT COMPANY ON THE STRENGTH OF ITS PROPRIETARY VIRTUAL PROTOTYPING PLATFORM THAT ALLOWS SIMULATION OF CELL TYPES//DISEASE IN SILICO.

Technology Platform

Pipeline

Figure 1: Simulation Based personalization

Figure 2: Cellworks Therapeutic Programs

BUGWORKS - BUGWORKS IS A VALIDATION OF CELLWORKS SIMULATION IN SILICO TECHNOLOGY PLATFORM WHERE ITS BUGWORKS MICROBIAL PLATFORM (BMP) COMBINES FUNCTIONAL PROTEOMICS WITH SOPHISTICATED SEMICONDUCTOR DESIGN ENGINEERING TO MODEL AND MANIPULATE VARIOUS BACTERIAL SYSTEMS.

Therapy focus- Serious Hospital Infection

Technology Platform

Need of the Hour- New Targets= New Antibiotic Class

The GAIN Act

Figure 1: Drug Development Success For Tb

Figure 2: Going Way Froward: focus: Helathcare Associated Infections

TERGENE - TERGENE'S FIRST PRODUCT IN DEVELOPMENT IS A VACCINE FOR PNEUMONIA CAUSED BY, STREPTOCOCCUS PNEUMONIA (PNEUMOCOCCOUS). THE AVAILABLE VACCINE THE PNEUMOCOCCAL POLYSACCHARIDE VACCINES (PPV)

Development Strategy and Status-

Long term plans-

Vaccine Market-

Figure 1: sales of currently available vaccines for streptococcus pneumonia

Figure 2: Ww Demand Forecast Of Vaccines For Streptococcus Pneumonia

Figure 3: Vaccine Market

I would like to order

Product name: India Pharma Outlook 2015: Accelerating Growth to the Next Level: Moving up the Value Chain Beyond Generics

Product link: <https://marketpublishers.com/r/IFE7F930BA6EN.html>

Price: US\$ 2,000.00 (Single User License / Electronic Delivery)

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

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/IFE7F930BA6EN.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

