

India Active Pharmaceutical Ingredients Market, By Method of Synthesis (Synthetic v/s Biological), By Source (Contract Manufacturing Organizations v/s In-house Manufacturing), By Therapeutic Application (Cardiovascular Diseases, Anti-diabetic Drugs, Oncology Drugs, Neurological Disorders, Musculoskeletal Disorders, Others), By Drug Type (Generics v/s Innovator), By Region, Competition Forecast & Opportunities, FY2027

<https://marketpublishers.com/r/IA37A4BB361FEN.html>

Date: August 2021

Pages: 72

Price: US\$ 4,400.00 (Single User License)

ID: IA37A4BB361FEN

Abstracts

India active pharmaceutical Ingredients market stood at USD11806.93 million in FY2021 and is expected to grow at a CAGR of 12.24% during the forecast period. This growth can be attributed to high growth of the biopharmaceutical sector in the country. Additionally, increasing geriatric population in India is further expected to boost the demand through FY2027. Furthermore, growing prevalence of chronic diseases such as cardiovascular diseases, diabetes, cancer, respiratory disorders, among others is going to boost the market. According to the World Health Organization (WHO), cardiovascular diseases are the leading cause of death globally, accounting for an estimated 17.9 million lives each year. The major drivers boosting the growth of the India active pharmaceutical ingredients market are the rising drug research and increase in development and manufacturing of drugs and the increasing uptake of biopharmaceuticals. Besides, the sudden outbreak and spread of COVID-19 pandemic across the globe, with India being severely hit by the pandemic crisis, also opened opportunities for the growth of India active pharmaceutical ingredients market. Due to the pandemic spread major countries boycotted China for trade as it was where the virus originated, similarly India also banned all kinds of imports and exports with China.

This led to development of manufacturing facilities in the country and improved the status of domestic players. Also, India being a major pharmaceutical hub witnessed demand from various countries across the globe for getting the medical supplies and drugs. This in turn positively influenced the growth of active pharmaceutical ingredients market in the country. Also, supportive government policies such as Atmanirbhar Bharat, Pharma Vision 2020, Production Linked Incentive Scheme, among others is further expected to create lucrative opportunities for the growth of overall pharmaceutical industry and India active pharmaceutical ingredients market.

The India active pharmaceutical ingredients market is segmented based on method of synthesis, source, therapeutic application, drug type, company, and region. Based on method of synthesis, the market is further segmented into synthetic and biological. The synthetic method of synthesis dominated the market with a share of 56.29% in FY2021 on account of the easy availability of raw materials and easier process for development of active pharmaceutical ingredients. While the biological method of synthesis segment is expected to grow at a rate of 13.21% during the forecast period owing to the growing demand for vaccines, monoclonal antibodies, recombinant proteins, biosimilars, among others.

Based on drug type, the market is further segmented into generics and innovators. Generics dominated the market with a share of 69.56% in FY2021 as the country also has a large pool of scientists and engineers with a potential to steer the industry ahead to greater heights. India ranks 3rd in terms of pharmaceutical production by volume and 14th by value. The Indian pharmaceutical industry accounts for 2nd largest number of Abbreviated New Drug Application.

Teva API India Limited, Pfizer Ltd., Ipca Laboratories Limited, Dr. Reddy's Laboratories Ltd., Sun Pharmaceutical Industries Limited, Cipla Limited, Lupin Limited, Aurobindo Pharma Limited, Aarti Drugs Ltd., IOL Chemicals and Pharmaceuticals Limited, Divis Laboratories Ltd., Granules India Limited, Laurus Labs Ltd., Solara Active Pharma Sciences, GlaxoSmithKline Pharmaceuticals Ltd, are some of the major companies operating in the India active pharmaceutical ingredients market. Major companies are developing advanced technologies, receiving approvals from regulatory bodies, and launching new products to stay competitive in the market. Other inorganic growth strategies include mergers & acquisitions, research collaborations, joint ventures, and new product developments to sustain themselves amidst fierce competition.

Years considered for this report:

Historical Years: FY2017-FY2020

Base Year: FY2021

Estimated Year: FY2022E

Forecast Period: FY2023F-FY2027F

Objective of the Study:

To analyze historical growth in the market size of India active pharmaceutical ingredients market from FY2017 to FY2021.

To estimate and forecast the market size of India active pharmaceutical ingredients market from FY2022 to FY2027 and growth rate until FY2027.

To classify and forecast India active pharmaceutical ingredients market based on method of synthesis, source, therapeutic application, drug type, company, and regional distribution.

To identify dominant region or segment in the India active pharmaceutical ingredients market.

To identify drivers and challenges for India active pharmaceutical ingredients market.

To examine competitive developments such as expansions, new product launches, mergers & acquisitions, etc., in India active pharmaceutical ingredients market.

To identify and analyze the profiles of leading players operating in India active pharmaceutical ingredients market.

To identify key sustainable strategies adopted by market players in India active pharmaceutical ingredients market.

TechSci Research performed both primary as well as exhaustive secondary research

for this study. Initially, TechSci Research sourced a list of manufacturers across the country. Subsequently, TechSci Research conducted primary research surveys with the identified companies. While interviewing, the respondents were also enquired about their competitors. Through this technique, TechSci Research could include the manufacturers which could not be identified due to the limitations of secondary research. TechSci Research analyzed the manufacturers, distribution channels and presence of all major players across the country.

TechSci Research calculated the market size of India active pharmaceutical ingredients market using a bottom-up approach, wherein data for various end-user segments was recorded and forecast for the future years. TechSci Research sourced these values from the industry experts and company representatives and externally validated them through analyzing historical data of these segments for getting an appropriate, overall market size. Various secondary sources such as company websites, news articles, press releases, company annual reports, investor presentations and financial reports were also studied by TechSci Research.

Key Target Audience:

Active Pharmaceutical Ingredients manufacturers/ suppliers/ distributors

Market research and consulting firms

Government bodies such as regulating authorities and policy makers

Organizations, forums and alliances related to Active Pharmaceutical Ingredients

The study is useful in providing answers to several critical questions that are important for the industry stakeholders such as manufacturers, suppliers and partners, end users, etc., besides allowing them in strategizing investments and capitalizing on market opportunities.

Report Scope:

In this report, India Active Pharmaceutical Ingredients market has been segmented into following categories, in addition to the industry trends which have also been detailed below:

India Active Pharmaceutical Ingredients Market, By Method of Synthesis:

Synthetic

Biological

India Active Pharmaceutical Ingredients Market, By Source:

Contract Manufacturing Organizations

In-house

India Active Pharmaceutical Ingredients Market, By Therapeutic Application:

Cardiovascular Diseases

Anti-diabetic Drugs

Oncology Drugs

Neurological Disorders

Musculoskeletal Disorders

Others

India Active Pharmaceutical Ingredients Market, By Drug Type:

Generics

Innovator

India Active Pharmaceutical Ingredients Market, By Region:

West

South

North

East

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in India Active Pharmaceutical Ingredients market.

Available Customizations:

With the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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