

The background of the slide is a detailed line drawing of various laboratory glassware and equipment, including flasks, beakers, and pipettes, some with numerical labels like 28, 59, 62, 61, 43, 46, 48, 49, and 47. A red rectangular box is overlaid on the top left.

FÒRUM
biocat

EMERGING MARKETS IN INDIA

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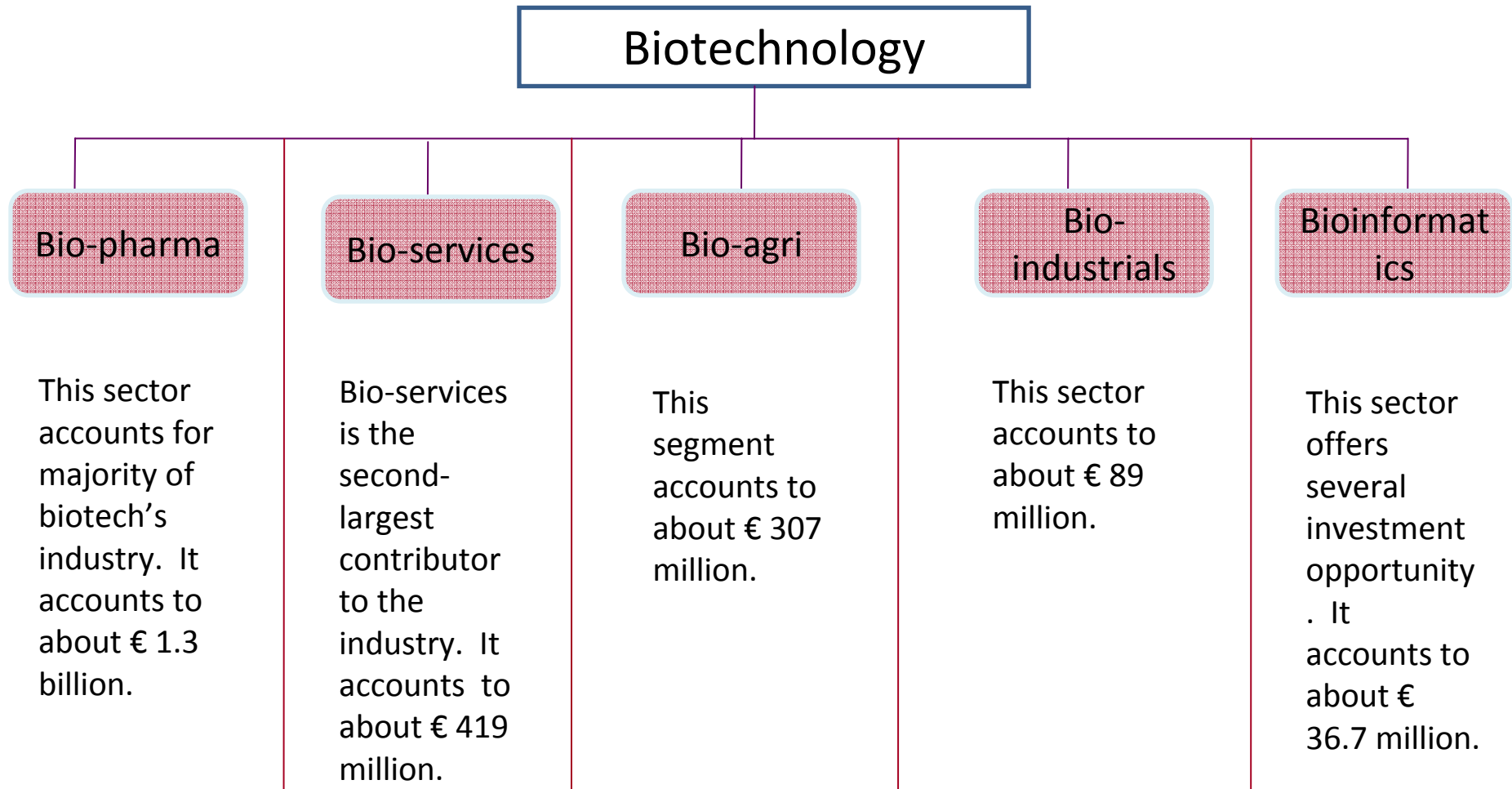
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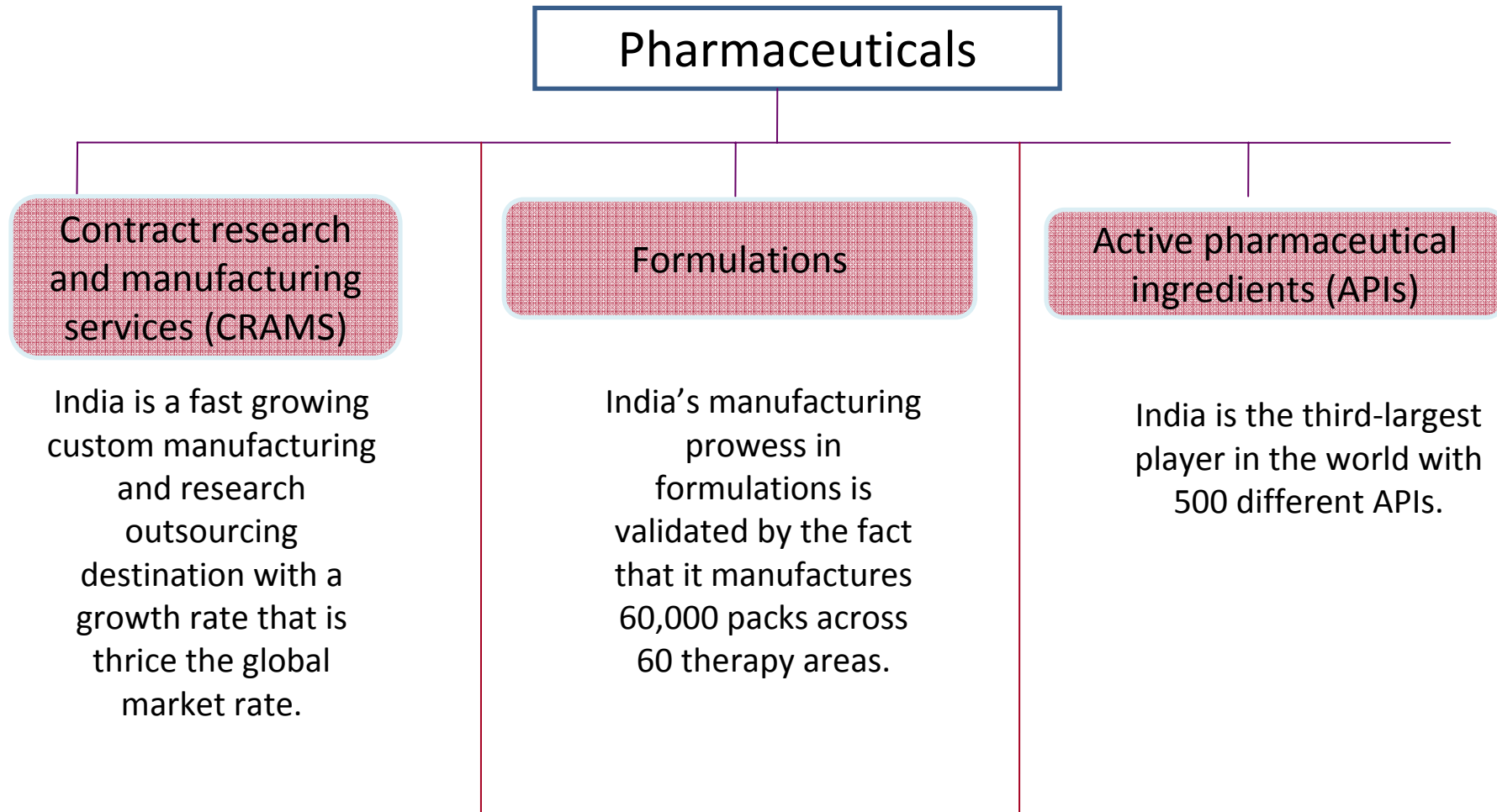


Key Players

- The leading ten companies (in terms of revenues) accounted for 39 per cent of the total industry revenues in 2008–09.
- MNCs such as Novo Nordisk and Novozymes feature among the leading 10 biotech companies.
- Of the top 20 companies, 19 of them generated revenues worth € 14.6 million in 2008–09.
- The leading 30 home-grown companies contributed revenues worth € 0.9 billion, accounting for 57 per cent of the total revenues of the industry in 2008–09.
- Serum Institute of India and Biocon are the two leading players in the industry.

Current Scenario of Indian Medical Technology

Market Segments



Key Players

Company	No of Beds	Presence
Apollo Hospitals Enterprise Ltd	4356	Chennai, Madurai, Hyderabad, Karur, KarimNagar, Mysore, Visakhapatnam, Bilaspur, Aragonda, Kakinada, Bengaluru, Delhi, Noida, Kolkata, Ahmedabad
Aravind Eye Hospitals	3537	Theni, Tirunelveli, Coimbatore, Puducherry, Madurai, Amethi, Kolkata
CARE Hospitals	1666	Hyderabad, Vijaywada, Nagpur, Raipur, Bhubaneshwar, Surat, Pune, Visakhapatnam
Fortis Healthcare Limited	5044	Mumbai, Bengaluru, Kolkata, Mohali, Noida, Delhi, Amritsar, Raipur, Jaipur, Chennai, Kota
Max Hospitals	800	Delhi and NCR
ManipalGroup of Hospitals	+7000	Udupi, Bengaluru, Manipal, Attavar, Mangalore, Goa, Tumkur, Vijaywada, Kasargod, Visakhapatnam

Opportunities

Opportunities – Biopharma

- The growth in the biosimilars market is driven by an increasing use of biologics in disease areas such as cancer, auto-immune and orphan diseases and cost containment.
- Companies in this segment include Reliance Biopharma, Shantha Biotech, Panacea Biotech, Wockhardt, Dr Reddy's, Biocon, Intas Biopharmaceuticals and Avesthagen.
- Glenmark and Cipla are targeting new product launches in 2010.

Segment	Potential
Bio-pharmaceuticals	€ 1.45
Bio-services	€ 0.72

Opportunities —bio-similars

Increasing use of biologics in disease areas such as cancer, auto-immune and orphan diseases, in addition to healthcare cost containment, has driven the growth of bio-similars.

Companies in this space include

- Reliance Biopharma
- Shantha Biotech
- Panacea Biotec
- Wockhardt
- Dr Reddy's
- Biocon
- Intas Biopharmaceuticals and
- Avesthagen

Glenmark and Cipla are targeting new product launches in 2010.

Looking Ahead

- India is already being globally recognised as a manufacturer of economical, high-quality bulk drugs and formulations.
- With a huge base of talented, skilled and cost-competitive manpower, and a well-developed scientific infrastructure, India has great potential to become a leading global player in biotechnology.
- According to a report by PricewaterhouseCoopers (PwC) in April 2010, India will join the league of top 10 global pharmaceuticals markets in terms of sales by 2020 with the total value reaching €37.82 billion.

The background of the slide is a repeating pattern of various chemistry glassware and equipment, including flasks, beakers, and test tubes, each labeled with a number. A large red circle is centered behind the text.

Thank You!

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