

THE INDIAN

PHARMACEUTICALS

SECTOR

Investment

Opportunities in Drugs,

Medicines, Active

Pharma Ingredients

(APIs) Industry



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INTRODUCTION

In the recent decade, India's pharmaceutical business has grown tremendously. This sector generates more than \$11 billion per year and is expected to rise to more than \$20 billion by the end of 2020, making it one of India's fastest-growing industries.

All forms of drugs, including over-the-counter treatments and prescription medicines such as antibiotics, pain relievers, contraceptives, and tranquilizers, are manufactured, distributed, sold, and marketed in the pharmaceuticals sector.





It also comprises vaccinations and antibodies, which are employed in laboratories to assess the effects of new treatments or as research tools.

➤ **Visit this Page for More Information: [Start a Business in Pharmaceutical sector](#)**

The Indian pharmaceutical industry is one of the country's fastest-growing industries, with one of the primary drivers being the changing lifestyles of Indian citizens, who are now much more conscious of their health and well-being. However, as people become more aware, there is a greater demand for therapies and pharmaceuticals to improve quality of life,...

..which pharmaceutical companies are working hard to provide. Here, we'll look at some of the primary factors influencing the pharmaceuticals market's growth in India, as well as the prospects available in this quickly expanding industry.

➤ **Read our Books Here: [Pharmaceutical, Drugs, Proteins Technology Handbooks](#)**

Indian Pharmaceuticals Market Size

In the worldwide pharmaceuticals sector, the Indian pharmaceuticals industry is a major player. India is the world's third-largest producer by volume and the fourteenth-largest producer by value. The country is the world's largest provider of generic medications, accounting for 20% of worldwide supply by volume, and the world's leading vaccine manufacturer.

Outside of the United States, India boasts the biggest number of US-FDA approved pharma plants, with over 3,000 pharma businesses and a robust network of over 10,500 manufacturing facilities, as well as a highly skilled workforce.

- **Related Feasibility Study Reports:** [Pharmaceutical, Drugs, Fine Chemicals, Bulk Drug Intermediates, Pharmaceutical Drugs, Pharma Drug Ingredients Intermediates, Drug Intermediates, Speciality Chemicals, Raw Materials, Fine and Specialty Chemicals Intermediates, Pharmaceutical Bulk Drugs](#)



In India, there are 60,000 generic products available over 60 therapeutic categories. Generic medications, over-the-counter medicines, API/bulk drugs, vaccines, contract research and manufacturing, biosimilars, and biologics are all major segments.

- **The government has authorised incentives totaling INR 21,940 crore (\$3 million).**
- **By 2024, it's expected to reach \$65 billion, and by 2030, it'll be between \$120 and 130 billion.**
- **10% to 12% growth rate**
- **Manufacturing costs are 33% cheaper than in Western markets.**
- **Exports increased by 18.7% year over year.**

After Japan, China, and South Korea, India is the fourth largest Asian medical device market and one of the top 20 global medical device markets. With 60% of the world's vaccines and 20% of generic medications coming from India,...

➤ **For further details, please refer [FDI Policy](#)**



..Under the automatic route for Greenfield pharmaceuticals, 100 percent Foreign Direct Investment (FDI) is allowed in the pharmaceutical sector. Brownfield pharmaceuticals are allowed 100 percent FDI in the pharmaceutical sector, with 74 percent approved under the automatic method and the rest through government permission.

India's Pharmaceutical Sector

In recent years, India's pharmaceutical business has seen significant development and investment, and it shows no signs of slowing down. Nearly four million people work in the industry, which is backed by a variety of manufacturing facilities.

- **Watch other Informative Videos:** [Pharmaceutical, Drugs, Fine Chemicals, Bulk Drug Intermediates, Pharmaceutical Drugs, Pharma Drug Ingredients Intermediates, Pharmaceutical Bulk Drugs](#)

Investors are keeping a close eye on global trends and preparing themselves to profit from India's burgeoning pharmaceutical industry. According to some projections, branded medicine sales might exceed \$24 billion by 2016, representing a more than 50% rise since 2010. Large investments in research and development (R&D) as well as marketing techniques that focus on branded pharmaceuticals rather than generics have fueled India's pharmaceutical sector's growth.

In addition, because India's pharmaceutical business offers larger profit margins than other rising economies, many international companies have increased their focus on it. As a result, India's pharmaceutical sector currently has hundreds of enterprises investing in R&D and other sorts of innovation.

➤ **Market Research Reports: [India Active Pharmaceutical Ingredient \(API\) Market](#)**



Industry Scenario

India's pharmaceutical sector is anticipated to grow to \$65 billion by 2024 and \$120 billion by 2030.

India's pharmaceutical sector is currently valued at \$41.7 billion dollars. India is a large exporter of pharmaceuticals, having pharma exports to over 200 nations. India supplies approximately half of Africa's generics need, 40% of generic demand in the United States, and 25% of all pharmaceuticals in the United Kingdom.

India is also a major provider of DPT, BCG, and Measles vaccinations, accounting for 60 percent of global demand. India supplies 70% of WHO vaccinations (as per the WHO's essential Immunization Schedule).



Since 2013-14, Indian pharmaceutical exports have increased by 103 percent, from INR 90, 415 crores in 2013-14 to INR 1,83,422 crores in 2021-22. The Pharma Sector's export performance in 2021-22 was the best it has ever been. Exports have increased by about \$10 billion in the last eight years, a tremendous increase.



India as a Healthcare Hub

India's pharmaceutical sector produces over 20% of all pharmaceuticals produced worldwide. It was ranked sixth among worldwide medicine suppliers in 2014. Dr Reddy's Laboratories and Ranbaxy Laboratories,..

..two of India's most well-known enterprises, generate more than half of their revenue from abroad markets. Despite the fact that India's pharmaceutical industry faces a number of problems, including its status as a generic medicine exporter and high operating costs, investment opportunities abound due to the country's vast market potential.

Over the next five years, India will be one of four countries that will lead increase in pharmaceutical spending. India's proportion of global healthcare spending is expected to rise from 3.8 percent to 5.5 percent by 2020, according to the report.



Factors like as rising disposable incomes and an ageing population, which means an increase in the number of people who need chronic care or regular check-ups, will fuel this trend. In addition, in emerging economies such as China and Brazil, there is an increasing demand for affordable pharmaceuticals.

According to India's health-care statistics, the government spends more on healthcare than any other Asian country, and 90% of Indians have private or public health insurance. This means that the majority of Indians have access to high-quality healthcare, including advanced medical technology and pharmaceuticals.

➤ **Read Similar Articles: [Pharmaceutical Industry](#)**

As a result, India is a very appealing market for pharmaceutical companies, and as a result, investors have been eager to invest in BSE-listed pharmaceutical equities (Bombay Stock Exchange). While there are various variables driving investor interest in pharma companies, one stands out: the Indian pharmaceutical industry's strong growth potential.

Growth Drivers

Government Support There are **INR 21940** in **government incentives** for **PLI 1.0** and **PLI 2.0**.

GOVERNMENT



Production Linked Incentive (PLI) Scheme

The following Production Linked Incentive Schemes are supporting the Indian pharmaceuticals market by boosting domestic manufacturing capacity, including high-value items across the global supply chain. Key Starting Materials (KSMs), Drug Intermediates (DIs), and Active Pharmaceutical Ingredients (APIs) under the PLI Scheme (PLI 1.0) 2. Pharmaceuticals Production-Linked Incentive (PLI) Scheme d (PLI 2.0).

**Medical Tourism
offers high-quality
services at low prices
when compared to the
United States, Europe,
and South Asia.**





**Infrastructure
Development Outside
of the United States,
India boasts the most
US-FDA-compliant
plants.**

**Strong medicine
manufacturing
expertise, including
low-cost generic
patented drugs and
end-to-end production.**





Strong domestic demand has resulted in the launch of the world's largest national health protection scheme.

Benefits of Starting a Business in India's Pharmaceutical Sector

India is a popular choice for pharmaceutical businesses looking to establish manufacturing facilities because of its low production costs and competent workforce. The Indian government has been actively pushing pharmaceutical investments by offering a variety of tax breaks and other financial incentives.

The Ministry of Finance has been working to increase ease of doing business through numerous policy changes, which has boosted new investment prospects in India's fast increasing pharmaceutical industry. For example, during the 2017-18 Budget Speech, it was announced that FDI caps for the manufacture of medications and pharmaceuticals will be raised from 26% to 49% via the automatic method.

Furthermore, 100 percent FDI will be authorised via the automatic route in Greenfield pharma projects with a capital investment of Rs 100 crore or more over a five-year period, with no requirement for local sourcing. Furthermore, 100 percent FDI will be allowed under the automatic route in brownfield pharma projects with a capital investment of Rs 500 crore or more over three years and no requirement for local sourcing.

These policies are likely to attract significant foreign direct investment into India's rapidly growing pharmaceutical industry. This is intended to facilitate entry into India's pharmaceutical business for indigenous players as well as global multinationals such as Pfizer Inc., Johnson & Johnson, Novartis AG, and others. This would provide a favourable climate for them to capitalise on India's enormous growth potential in the healthcare sector.

Industry Trends

- **Supplier of Generics Around the World**
- **By volume, it accounts for 20% of the global supply.**
- **Biosimilars and Biologics: Globally, the most biosimilars have been approved, with a CAGR of 22%.**
- **Supplier of Vaccines around the World: Vaccines are supplied to over 150 nations, making it the world's largest vaccine supplier.**

- **Industry of Contract Research and Manufacturing Services**
- **This is one of the fastest-growing industry categories due to a large skill pool and cost savings.**
- **Healthcare is a rapidly expanding industry.**
- **Increasing salaries, medicine affordability, and the use of health insurance.**

Government Ministry/ Department

- [Central Drugs Standard Control Organisation \(CDSCO\)](#)
- [Department of Pharmaceuticals, Ministry of Chemicals & Pharmaceuticals](#)
- [National Pharmaceutical Pricing Authority](#)

Industry Associations

- [Bulk Drug Manufacturers Association](#)
- [Federation of Pharma Entrepreneurs](#)
- [Indian Drug Manufacturers' Association \(IDMA\)](#)
- [Indian Pharmaceutical Alliance](#)
- [Organisation of Pharmaceutical Producers India \(OPPI\)](#)
- [Pharmexcil](#)

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Major Queries/Questions Answered in Our Report?

- 1. How has the industry performed so far and how will it perform in the coming years?**
- 2. What is the Project Feasibility of the Plant?**
- 3. What are the requirements of Working Capital for setting up the plant?**
- 4. What is the structure of the industry and who are the key/major players?**

- 5. What is the total project cost for setting up the plant?**
- 6. What are the operating costs for setting up the plant?**
- 7. What are the machinery and equipment requirements for setting up the plant?**
- 8. Who are the Suppliers and Manufacturers of Plant & Machinery for setting up the plant?**
- 9. What are the requirements of raw material for setting up the plant?**

10. Who are the Suppliers and Manufacturers of Raw materials for setting up the plant?

11. What is the Manufacturing Process of the plant?

12. What is the total size of land required for setting up the plant?

13. What will be the income and expenditures for the plant?

14. What are the Projected Balance Sheets of the plant?

15. What are the requirement of utilities and overheads for setting up the plant?

16. What is the Built up Area Requirement and cost for setting up the plant?

17. What are the Personnel (Manpower) Requirements for setting up the plant?

18. What are Statistics of Import & Export for the Industry?

19. What is the time required to break-even?

- 20. What is the Break-Even Analysis of the plant?**
- 21. What are the Project financials of the plant?**
- 22. What are the Profitability Ratios of the plant?**
- 23. What is the Sensitivity Analysis-Price/Volume of the plant?**
- 24. What are the Projected Pay-Back Period and IRR of the plant?**
- 25. What is the Process Flow Sheet Diagram of the plant?**
- 26. What are the Market Opportunities for setting up the plant?**
- 27. What is the Market Study and Assessment for setting up the plant?**
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Reasons for Buying Our Project Report

- ✓ **The report helps you to identify a profitable project for investing or diversifying into by throwing light to crucial areas like industry size, market potential of the product and reasons for investing in the product**
- ✓ **This report provides vital information on the product like it's characteristics and segmentation**
- ✓ **This report helps you market and place the product correctly by identifying the target customer group of the product**

- ✓ **This report helps you understand the viability of the project by disclosing details like machinery required, project costs and snapshot of other project financials**
- ✓ **The report provides a glimpse of government regulations applicable on the industry**
- ✓ **The report provides forecasts of key parameters which helps anticipate the industry performance and make sound business decisions**

Our Approach

- **Our research reports broadly cover Indian markets, present analysis, outlook and forecast for a period of five years.**
- **The market forecasts are developed on the basis of secondary research and are cross-validated through interactions with the industry players**
- **We use reliable sources of information and databases. And information from such sources is processed by us and included in the report**

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And before diversifying/venturing into any product, they wish to study the following aspects of the identified product:

- **Good Present/Future Demand**
- **Export-Import Market Potential**
- **Raw Material & Manpower Availability**
- **Project Costs and Payback Period**

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Working Capital Requirement, uses and applications, Plant Layout, Project Financials, Process Flow Sheet, Cost of Project, Projected Balance Sheets, Profitability Ratios, Break Even Analysis. The DPR (Detailed Project Report) is formulated by highly accomplished and experienced consultants and the market research and analysis are supported by a panel of experts and digitalized data bank.

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- We empower our customers with the prerequisite know-how to take sound business decisions
- We help catalyze business growth by providing distinctive and profound market analysis
- We serve a wide array of customers , from individual entrepreneurs to Corporations and Foreign Investors
- We use authentic & reliable sources to ensure business precision

Our Approach

Requirement collection

Thorough analysis of the project

Economic feasibility study of the Project

Market potential survey/research

Report Compilation

Who do we Serve?

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- Individual Entrepreneurs
- NRI's
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- Educational Institutions
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- Industry / trade associations

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- Activated Carbon & Activated Charcoal
- Aluminium And Aluminium Extrusion Profiles & Sections,
- Bio-fertilizers And Biotechnology
- Breakfast Snacks And Cereal Food
- Bicycle Tyres & Tubes, Bicycle Parts, Bicycle Assembling

Sectors We Cover *Cont...*

- Bamboo And Cane Based Projects
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- Chemicals (Organic And Inorganic)
- Confectionery, Bakery/Baking And Other Food
- Cereal Processing
- Coconut And Coconut Based Products
- Cold Storage For Fruits & Vegetables
- Coal & Coal Byproduct

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- Disinfectants, Pesticides, Insecticides, Mosquito Repellents,
- Electrical, Electronic And Computer based Projects
- Essential Oils, Oils & Fats And Allied
- Engineering Goods
- Fibre Glass & Float Glass
- Fast Moving Consumer Goods
- Food, Bakery, Agro Processing

Sectors We Cover *Cont...*

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- Fertilizers & Biofertilizers
- Ginger & Ginger Based Projects
- Herbs And Medicinal Cultivation And Jatropha (Biofuel)
- Hotel & Hospitality Projects
- Hospital Based Projects
- Herbal Based Projects
- Inks, Stationery And Export Industries

Sectors We Cover *Cont...*

- Infrastructure Projects
- Jute & Jute Based Products
- Leather And Leather Based Projects
- Leisure & Entertainment Based Projects
- Livestock Farming Of Birds & Animals
- Minerals And Minerals
- Maize Processing(Wet Milling) & Maize Based Projects
- Medical Plastics, Disposables Plastic Syringe, Blood Bags
- Organic Farming, Neem Products Etc.

Sectors We Cover *Cont...*

- Paints, Pigments, Varnish & Lacquer
- Paper And Paper Board, Paper Recycling Projects
- Printing Inks
- Packaging Based Projects
- Perfumes, Cosmetics And Flavours
- Power Generation Based Projects & Renewable Energy Based Projects
- Pharmaceuticals And Drugs
- Plantations, Farming And Cultivations
- Plastic Film, Plastic Waste And Plastic Compounds
- Plastic, PVC, PET, HDPE, LDPE Etc.

Sectors We Cover *Cont...*

- Potato And Potato Based Projects
- Printing And Packaging
- Real Estate, Leisure And Hospitality
- Rubber And Rubber Products
- Soaps And Detergents
- Stationary Products
- Spices And Snacks Food
- Steel & Steel Products
- Textile Auxiliary And Chemicals

Sectors We Cover *Cont...*

- Township & Residential Complex
- Textiles And Readymade Garments
- Waste Management & Recycling
- Wood & Wood Products
- Water Industry(Packaged Drinking Water & Mineral Water)
- Wire & Cable

Objective

- To get a detailed scenario of the industry along with its structure and classification
- To provide a comprehensive analysis of the industry by covering aspects like:
 - Growth drivers of the industry
 - Latest market trends
 - Insights on regulatory framework
 - SWOT Analysis
 - Demand-Supply Situation
 - Foreign Trade
 - Porters 5 Forces Analysis

Objective

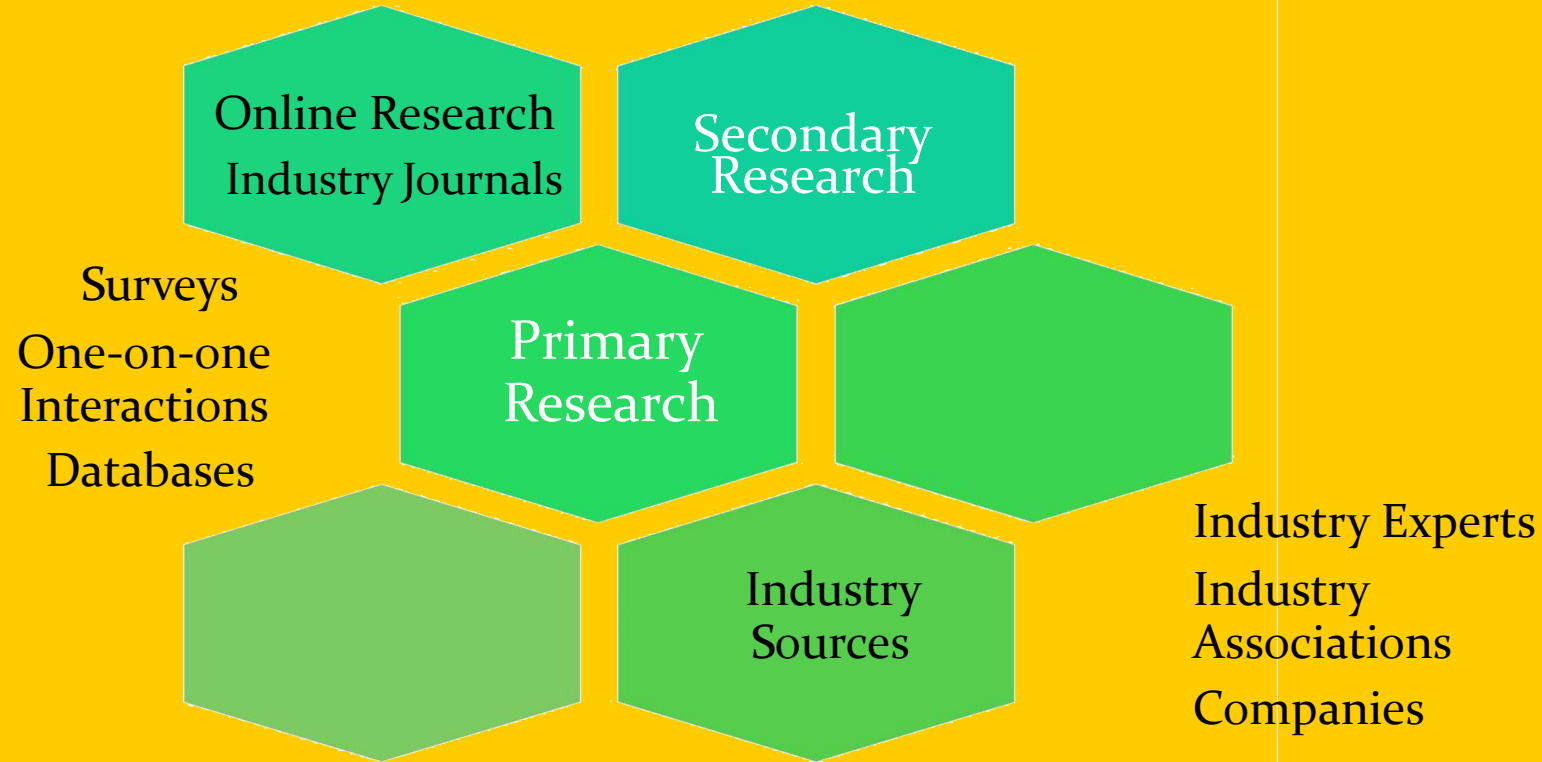
- To provide forecasts of key parameters which helps to anticipate the industry performance
- To help chart growth trajectory of a business by detailing the factors that affect the industry growth
- To help an entrepreneur/manager in keeping abreast with the changes in the industry
- To evaluate the competitive landscape of the industry by detailing:
 - Key players with their market shares
 - Financial comparison of present players

Clientele

- Venturist/Capitalists
- Entrepreneur/Companies
- Industry Researchers
- Investment Funds
- Foreign Investors, NRI's
- Project Consultants/Chartered Accountants
- Banks
- Corporates

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Data Sources



Scope & Coverage



Our Team

⌘ Our research team comprises of experts from various financial fields:

⌘ MBA's

⌘ Industry Researchers

⌘ Financial Planners

⌘ Research veterans with decades of experience

Structure of the Report

1. Overview
2. Market Analysis
 - 2.1 Growth Drivers
 - 2.2 Emerging Trends in the Industry
 - 2.3 Regulatory Framework
 - 2.4 SWOT Analysis
 - 2.5 Herfindahl–Hirschman Index (HHI)
3. Market Forecasts
4. Key Players

Structure of the Report

Cont

- 5. Key Financials and Analysis
 - 5.1 Contact Information
 - 5.2 Key Financials
 - 5.3 Financial comparison
- 6. Industry Size & Outlook

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