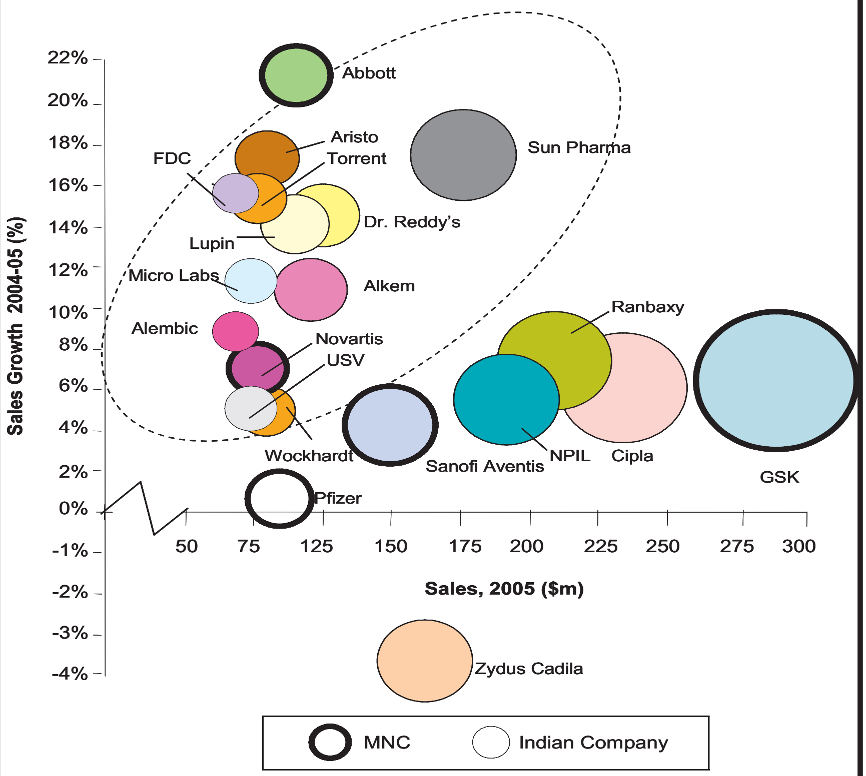
The Indian Pharmaceutical Market to 2011

1. Cipla
2. Ranbaxy
3. Nicholas Piramal
4. Sun Pharmaceuticals
5. Zydus Cadila
6. Dr. Reddy's
7. Alkem
8. Lupin
9. Aristo
10. Torrent

Competitive Dynamics between the 20 leading companies in India, 2005



Note: Bubble size is proportionate to 2005 Market Share; NPIL= Nicholas Piramal

Your insight into

- Strategic position
- Best practice strategies
- Mergers and acquisitions
- Therapeutic focus

tel: 877/437-4276 fax: +781/639-0179
email: epharm@hcpro.com

Business Insights

The Indian Pharmaceutical Market to 2011

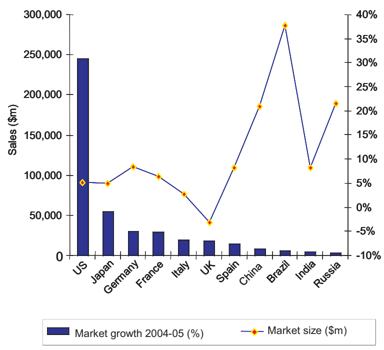
Traditionally, the Indian pharmaceutical industry has been characterized by a core competency in generics' manufacturing and relatively immature capabilities in R&D. This outlook has evolved substantially since the 1990s and Indian companies have been making investments towards expanding drug discovery and development capabilities. The acceptance of patent laws and the rise of contract manufacturing have led to the diversification of revenue streams, enabling Indian pharma companies to experience high market growth.

The Indian Pharmaceutical Market to 2011 provides a detailed analysis of the leading players and discusses how they are planning to sustain growth over the next five years. For each company, this report analyzes current and future therapeutic focus, sales growth, key pipeline products and future growth prospects.

This report will help you to identify the critical success factors that have driven company growth, evaluate diversification opportunities and assess the future potential of each company's R&D portfolio over the next five years.

Key findings of the report...

Figure 1.1: Comparison of pharmaceutical sales in the markets of India, EU5, US, Brazil, Russia, China and Japan, 2005



Source: The Indian Pharmaceutical Market to 2011

"On a global perspective, the Indian pharmaceutical is ranked among the lowest as per sales potential in 2005. However, the rate of pharmaceutical spending is expected to continue growing at a rapid pace, based on 5 year CAGRs (compound annual growth rates) over 2001-05..."

- In 2005, the **Indian pharmaceutical industry was valued at $4,660m, representing an increase of 8.3%** over year previous sales of $4,304m. A surge in growth is expected to take place between 2006 and 2008, attributable to the opportunities presented by contract research and manufacturing sourcing (CRAMS).

- MNCs have a modest representation among the top 20 companies in the Indian pharmaceutical industry. As the market leader, **GSK captured a 6.3% share, illustrating the highly fragmented nature of the market**.

- **The re-introduction of the patent regime in 2005 has forced many smaller Indian companies to exit the industry**, while others have been forced to re-evaluate existing corporate strategies.

- The Indian market has been associated with commodity generics, although a shift in priorities has occurred with many companies increasing their investments in research capabilities and thus **establishing themselves as development partners of choice with international companies.**

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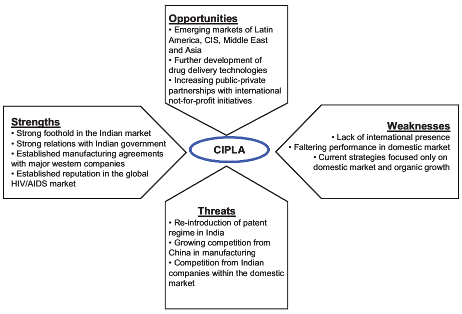
email: epharm@hcpro.com

Key questions answered in this report



Source: The Indian Pharmaceutical Market to 2011

"Cipla's strategy to establish itself in the Indian and international markets has been primarily through continual investments in manufacturing facilities, developing drugs in collaboration with third parties and forming manufacturing contracts with international generics companies..."

- What are the challenges faced by pharmaceutical companies in the Indian market?
- How has the re-introduction of patent regime affected Indian pharmaceutical companies?
- What are the market shares for the ten leading Indian companies 2005?
- Which of the top ten companies are out performing and under performing in the current market situation and why?
- What are the major strengths, weaknesses, opportunities and threats for the market leaders?
- Which of the ten companies features the most promising R&D pipeline and how will this impact future growth?

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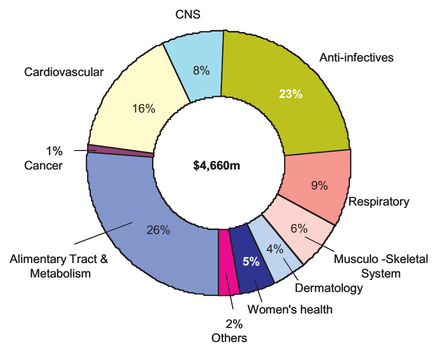
Figure 1.3: Sales performance of different therapeutic areas in the Indian market, 2005



Source: The Indian Pharmaceutical Market to 2011

"In 2005, the strongest performance was recorded by products indicated for the treatment of alimentary tract and metabolism related disorders, which accrued sales of $1,230m, representing a market share of 26.4%..."

- **Gain insights from the best practices of the top 10 Indian pharma companies**, by reviewing detailed profiles of current and future drug portfolios, growth strategies and organizational structure.
- **Assess the pipeline strength of the top 10 Indian Pharma companies** and identify future opportunities for growth.
- Evaluate how market share of leading companies, such as **Ranbaxy, Cipla, Nicholas Piramal, Sun Pharma and Zydus Cadila** will change over the next 5 years.
- **Benchmark forecast performance of the leading players** by using analysis of key products in major indications.
- **Identify which therapy areas offer the greatest opportunity** by evaluating the therapeutic focus of the competition.

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Sample information from the report

Chapter 2: Company Analysis

Dr Reddy's

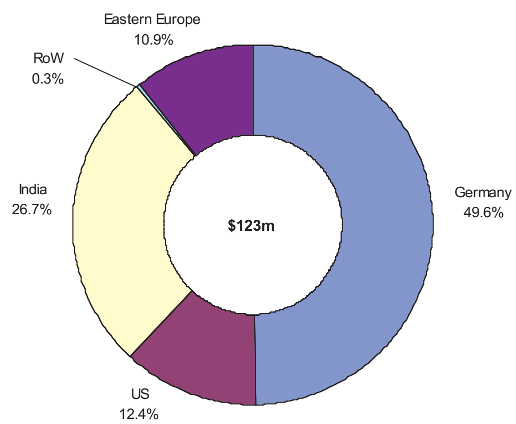
Overview

Dr. Reddy's Laboratories commanded 2.6% of the Indian pharmaceutical market in 2005, positioning the company at number six with sales of $123m. This represented an increase of 14.4% over 2004 sales of $108m. The company manufactures and markets APIs, finished dosages and biologics as well as diagnostic products. Dr. Reddy's has an extensive international presence, in over 60 markets including Europe, the US and Japan, with an active presence across the pharmaceutical value chain in the development and manufacturing of generic and branded pharmaceuticals and bulk pharmaceutical ingredients.

Other than manufacturing, Dr. Reddy's has three established R&D centers that focus on the development of generics, novel drug delivery systems (NDDS) and new drug discovery research (NDDR) in a range of research fields. While Dr. Reddy's has further expanded its capabilities through organic growth, the company has also taken an active part in expanding its geographic presence through M&A.

Dr. Reddy's sells and markets its products in more than 100 countries, with an established presence in the US, Germany and Russia. The company derives most of its revenues from exports and its international acquisitions that accounted for an estimated 65% of total revenues in 2005. Driven by the acquisition of the German pharmaceutical company, Betapharm, Germany accounted for 49.6% of sales in 2005. In the same year, the US market accounted for 12.4% of sales, followed by Eastern Europe which accounted for 10.9% of sales. Dr. Reddy's also possesses a subsidiary in the US, Reddy US Therapeutics, which is involved in drug discovery research focused on new molecular targets.

Figure 2.27: Dr. Reddy's geographic presence, 2005



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The Indian Pharmaceutical Market to 2011

TABLE OF CONTENTS

The Indian Pharmaceutical Market to 2011

LIST OF FIGURES (ABRIDGED)

LIST OF TABLES (ABRIDGED)

tel: 877/437-4276 fax: +781/639-0179
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