

## Indian Pharma Exporters & The World of P-MEC – Collector's Edition: Key highlights

- The global pharmaceutical market is currently estimated to be approximately \$1 trillion in value of which USA accounts for over 40%, followed by the European Union (EU) and Japan.
- The pharma sector is projected to increase at a CAGR of 5% during 2015-2020 and expected to be over \$1.3 trillion by 2020.
- Generics currently account for over 45% of the global pharmaceutical market by volume and about 20% by value.
- In India, about 70% of industry revenue is derived from generics, 21% from OTCs, and the remaining 9% from patented drugs.
- India is expected to rank among the top 10 markets globally by 2020 in value terms.
- Exports are expected to account for 72% of total Indian pharma production and reach a value of \$40-bn by 2020.
- USA imports pharma products from over 100 countries. Germany remains the largest supplier, whereas India stands at fourth position in terms of value. India exported \$4-bn worth of drugs to USA.
- Contract Research and Manufacturing Services (CRAMS) is one of the fastest and latest growing segments in global pharmaceutical market. The Indian CRAMS segment, valued at \$9.3-bn in 2014, is estimated to grow by over 20% to touch \$19-bn by 2018. The present share of Indian manufacturers in the global CRAMS segment is only 5% and is expected to rise to 7-8%.
- M&A activities in India touched \$25.62-bn during the first nine months of 2015, out of which 16 deals worth \$1.7-bn were made in the pharma sector. Currently, India has a robust pharmaceutical equipment and machinery manufacturing segment, with about 800 units. These generate an estimated \$920-mn in revenues in FY2015, up from \$350-mn in FY2008. The market is projected to reach \$1,780-mn by 2020. India currently exports pharmaceutical machinery and equipment to over 80 countries.