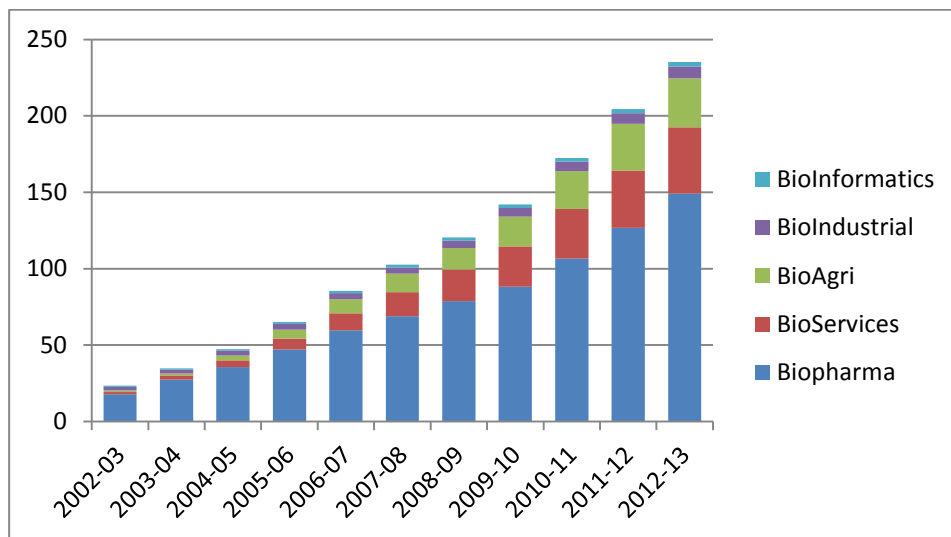


BIOTECHNOLOGY IN INDIA – 2013 “BIOSPECTRUM-ABLE” SURVEY

Edmond Differding, Differding Consulting s.p.r.l. (Belgium)

According to the eleventh annual Indian Biotech Industry survey by Biospectrum-ABLE (Association of Biotechnology Led Enterprises), the Indian biotech industry grew by 15.1 % in 2012-13, increasing its revenues from 204.4 Billion INR (Indian Rupees) to 235.24 Billion INR (3.94 B US\$ - exchange rate June 2013: 1 US\$ approx. 60 INR).

Figure: Indian Biotech Industry 2002-13 (in Billion INR)



INDIAN BIOTECH SECTORS

Biotech companies covered by this survey are grouped according to the following sectors:

- **BioPharma:** includes vaccines, therapeutics and diagnostics
- **BioAgri:** includes genetically modified seeds, molecular markers and related products
- **BioServices:** includes contract research and manufacturing services (CRAMS) and clinical research services
- **BioIndustrial:** includes enzymes for food, leather and textiles, pharmaceuticals, detergents and energy applications
- **BioInformatics:** includes information technologies to develop tools for drug discovery, and informatics based services.



MAJOR TRENDS

Based on a detailed questionnaire sent to over 200 companies, the annual survey captures the revenues – biotech products sales and service figures – or, if not available, relies on best estimates.

As in previous years, the Indian biotech industry is dominated by the BioPharma sector, which accounts for 63.5 % market share, followed by BioServices (18.5 %), BioAgri (13.6 %), BioIndustry (3.2 %) and BioInformatics (1.2 %). The differences in growth rates are significant, with BioPharma (17.7%) and BioServices (15.5%) leading the industry, followed by BioIndustrial (10.9%), BioInformatics (9.1%) and BioAgri (5.2%)

Figures for export (2,01 Billion US\$) slightly exceeded domestic sales (1.93 Billion US\$). Among exports, BioPharma (65 % of total exports) and BioServices (32 %) outweigh by far the other sectors with 1-2 % market share each.

The overall biotech industry registered on average 14.5 % annual growth over the last five years.

For details of this survey, please visit <http://www.biospectrumindia.com>, or <http://www.ableindia.in>

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More details on this report and on Indian Pharma and Biotech in general are available from:

Edmond Differding (PhD), Managing Director, Differding Consulting sprl

Route de Blocry, 55 ; B-1348 Louvain-la-Neuve ; Belgium

Email: edmond@differding.com - Mobile: +32-474-41.24.64 - Website: www.differding.com