

BIOTECHNOLOGY IN INDIA – 2012 “BIOSPECTRUM-ABLE” SURVEY

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According to the tenth annual Indian Biotech Industry survey by Biospectrum-ABLE (Association of Biotechnology Led Enterprises), the Indian biotech industry passed the 4 Billion US\$ mark in 2011-12, growing overall 15 percent compared to the previous year.

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.

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.

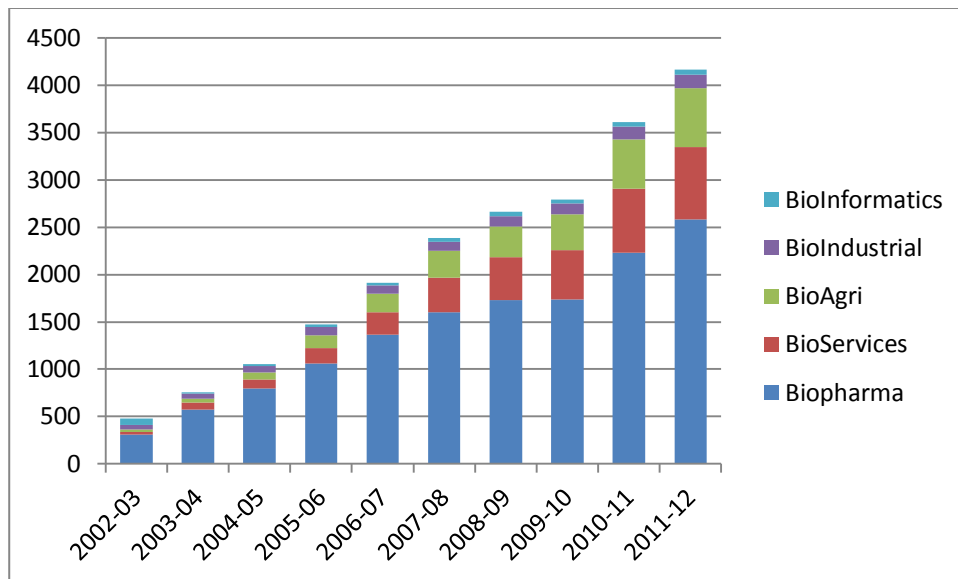
MAJOR TRENDS

The Indian biotech industry is dominated by the BioPharma sector, which accounts for 62 percent market share, followed by BioServices (18 percent), BioAgri (15 percent), BioIndustry (4 percent) and BioInformatics (1 percent).

Figures for export (2,003 Million US\$) and domestic sales (2,158 Million US\$) are in the same range, but the distribution between the various sectors differs considerably. Among exports, BioPharma (63 percent of total exports) and BioServices (33 percent) outweigh by far the other sectors with 1-2 percent market share each, although BioPharma and BioAgri have a strong domestic component (61 and 27 percent respectively of total domestic sales).



Figure: Indian Biotech Industry 2002-12 (in Million US\$)



The overall biotech industry registered on average 24 percent annual growth over 10 years.

With the opportunities arising from increasing global R&D costs and the drying-up of product pipelines of global pharma and biotech companies, India's biotech industry is well positioned to grow significantly further, given its strengths, such as entrepreneurial spirit, world-class manufacturing facilities, a rich talent pool with scientific and technical expertise and comparatively low operational costs, and despite its weaknesses, in particular the lack of financial support for doing long term, high risk innovation, and the need for more competencies in specific key areas.

For full details of this survey, refer to www.ableindia.in/pdf/reports24_10_survey.pdf

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

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