

Joint 23rd Medicines for Europe – 20th IGBA Annual Conference

Unlocking Pharma Growth – Emerging Markets

**by
D G Shah
Secretary General
Indian Pharmaceutical Alliance**

**Lisbon
16 June 2017**

Indian Pharmaceutical Alliance



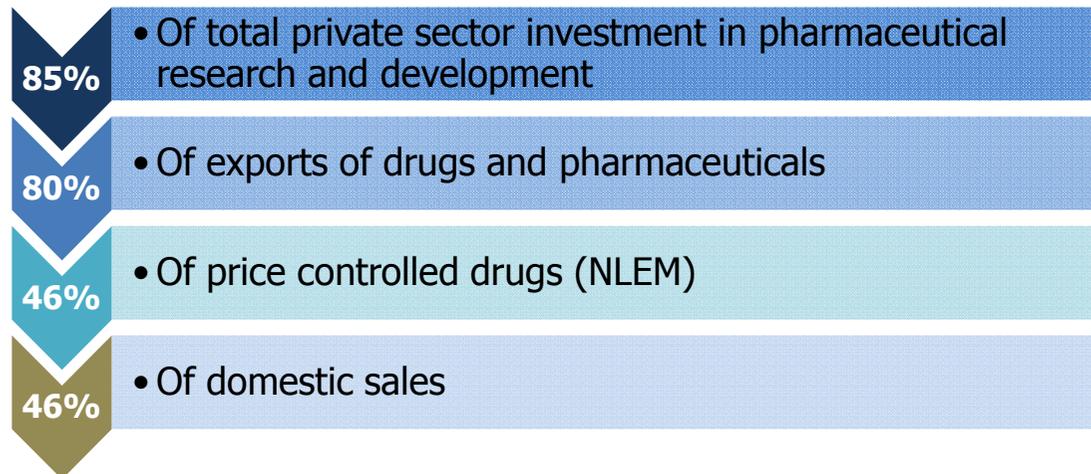
Indian Pharmaceutical Alliance

Current Members (20)

- Alembic
- Alkem
- Cadila Healthcare
- Cadila Pharmaceuticals
- Cipla
- Dr Reddy's
- Glenmark
- INTAS
- IPCA
- J B Chemicals
- Lupin
- Mylan
- Micro
- Natco
- Panacea Biotech
- Sun
- Torrent
- Unichem
- USV
- Wockhardt

Indian Pharmaceutical Alliance

Contribution

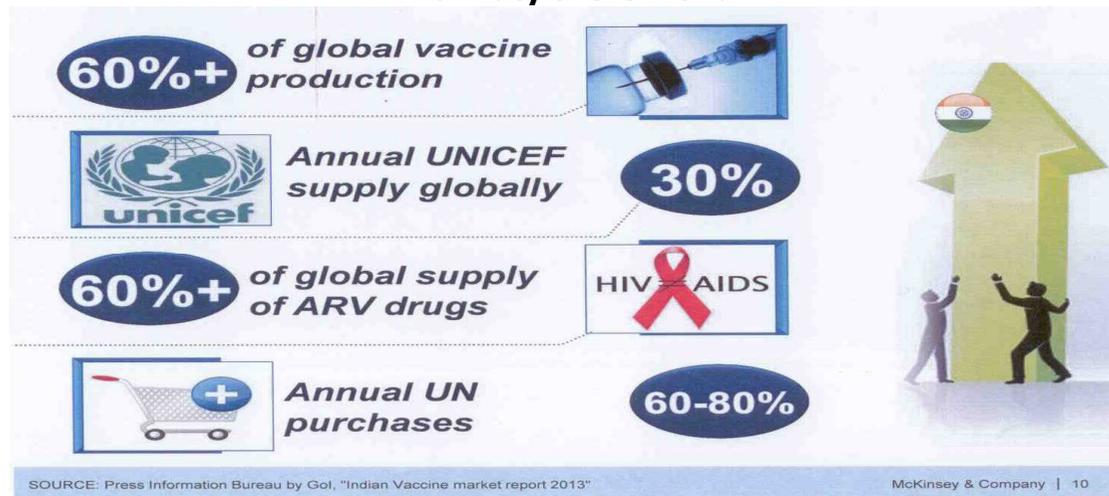


*Pharmatrack MAT Mar 2016

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Indian Pharmaceutical Industry

Pharmacy of the World

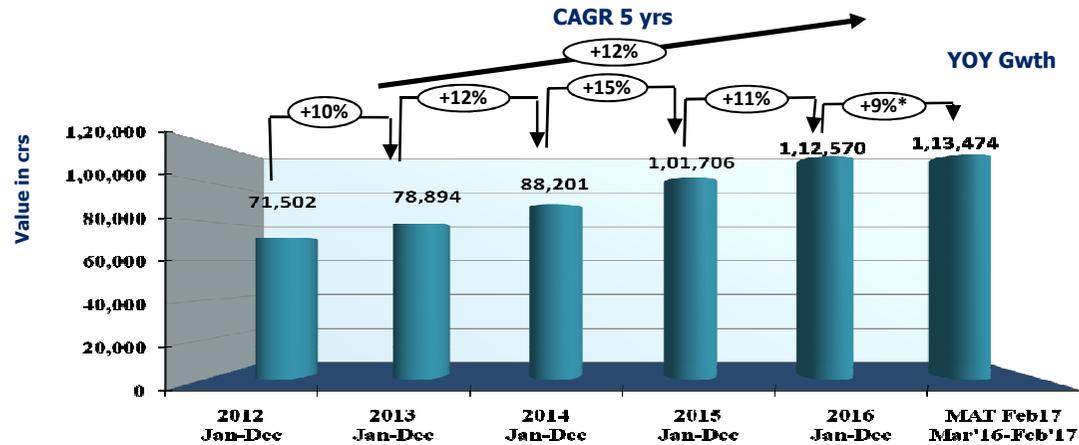


Courtesy: McKinsey & Co.

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Indian Pharmaceutical Industry

IPM Has Shown A Robust Growth Of 12% CAGR (2012-2016) and 15% in 2015 Thereafter, YoY Growth Declined to 11% in 2016 and to 9% for MAT Feb17



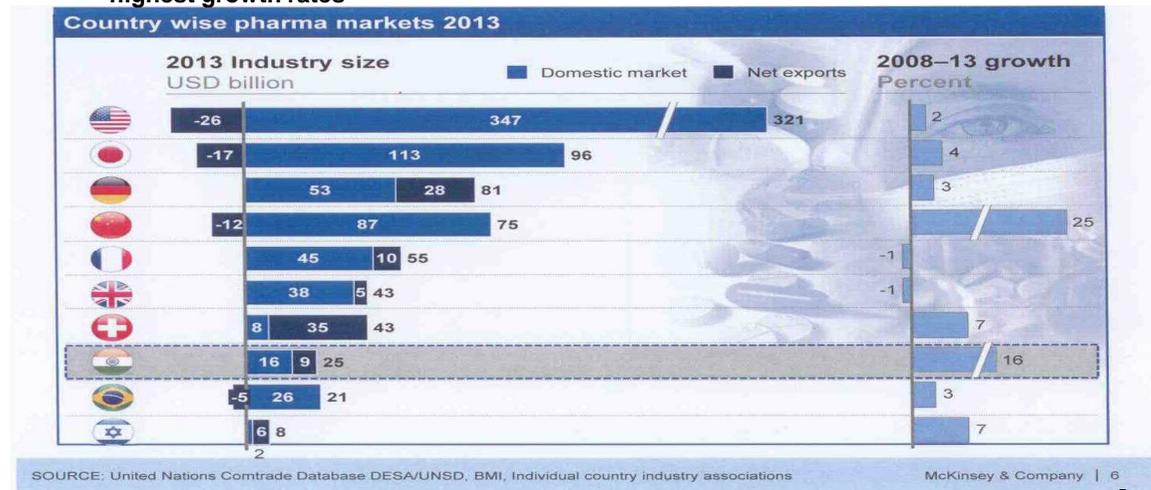
*For the corresponding 12-month period

Source: QuintilesIMS TSA Audit TSA Dec 2016, TSA Feb 2017

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McKinsey View of Indian Pharmaceutical Industry

- 1 Industry has grown to become 8th largest country globally and continues to have one of the highest growth rates



Courtesy: McKinsey & Co.

McKinsey View of Indian Pharmaceutical Industry

GLOBAL LEADERSHIP

2 Industry will also grow to become the 3rd largest globally by 2030

■ Countries improving rank
■ Countries deteriorating rank



¹ Pharma market defined as Domestic Consumption + Exports - Imports
 SOURCE: UN Comtrade, BMI, Local industry association data, team analysis

Courtesy: McKinsey & Co.

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Drug Regulatory Regime

Key Issues

- FDC Ban
- Generic Prescribing
- Capability Building

Aligning With Global Agencies

2

Pricing Policy

Implementation Issues

- Tweaking Definition of Brand to Inflict Deeper Price Cuts
- Denying/Delaying Price Approvals
- Retrospective Pricing: Burden of Compliance
- Frequent Price Revisions

Tilting Delicate Balance Between Access and Availability

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Innovation

However, India currently has nascent position in these innovation spaces



Courtesy: McKinsey & Co.

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THANK YOU
dgshah@vision-india.com

