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India pharmaceutical market was the 11th largest pharmaceuticals market by value in the world in 2017. It is expected to register second highest CAGR growth among all countries till 2023 and improve its ranking to reach 9th position in the global pharmaceuticals market. Indian pharmaceutical market is expected to grow in the upcoming years despite recent slowdown due to price erosion in U.S. generics pharmaceuticals market, delay in approval of complex generics by US FDA (United States Food and Drug Administration) and aggressive drug price control mechanism like Government mandated drug price controls using drug price control order (DPCO) which is an order issued by the Government of India under Section 3 of the Essential Commodities Act, 1955 empowering it to fix and regulate the prices of essential bulk drugs and their formulations. The reasons are simple: aging and growing population, rising income levels, and emerging medical conditions and emergence of new diseases.

India pharmaceuticals market is expected to be worth USD 33.18 billion by 2023.

As per NAVADHI Market Research, the India pharmaceutical industry will be worth USD 33.18 billion and will rank 9th in global pharmaceuticals market by 2023. The growth in this market is predicted on the basis of various factors like market drivers, current and upcoming trends, current growth pattern, and market challenges.

INDIA PHARMACEUTICALS MARKET FORECAST



CONSUMERS IN INDIA SPENT **51.67%** OF THEIR OUT-OF-POCKET HEALTH EXPENSE ON PHARMACEUTICALS



INDIA PHARMA SALES TO REACH **\$33.18** BILLION BY FY 2023



TOP 5 EXPORT COUNTRIES



ACCOUNTED FOR **48.58%** OF INDIA'S PHARMA EXPORTS

TOP 5 IMPORT COUNTRIES



ACCOUNTED FOR **48.80%** OF INDIA'S PHARMA IMPORTS

KEY 10 INDIA PHARMACEUTICAL COMPANIES COVERED



This growth is fueled by the growing and ageing population in India. More than 6% of Indian population is above 65 years of age and this number is expected to rise by 2023. Apart from ageing and rising population the improvements in purchasing power and access to quality healthcare and pharmaceuticals to poor and middle-class families is also driving the growth of Indian pharma industry. Indian people spend 64.21% of their health expenditure from out-of-pocket of which pharmaceuticals spend accounts for 51.67%. Other factors which are expected to contribute in the growth of Indian pharmaceuticals market are initiatives by Government of India like Pradhan Mantri Bhartiya Jan Aushadhi Pariyojana and Pradhan Mantri Jan Arogya Yojana (PMJAY). In 2018, Government of India launched the world's largest public healthcare scheme Ayushman Bharat Yojana or Pradhan Mantri Jan Arogya Yojana (PMJAY) under National Health Protection Scheme (NHPS) which aims to provide free healthcare coverage of up to INR 0.5 million to around 100 million people. Also, under the aegis of Pradhan Mantri Bhartiya Jan Aushadhi Pariyojana the Government of India as set up Jan Aushadhi Kendra (pharmacy stores) which provide quality medicines at affordable prices. These factors are expected to increase the access of pharmaceuticals to more people in world's second most populous nation.

On the other hand, Indian government's plan to widen the drug price control policies to patented and rare disease drugs along with tightening of rules by U.S. government like delay in approval of complex generics and price erosion in U.S. generics pharmaceuticals market (which is a major market for

Indian pharmaceuticals companies) are expected to impact the growth prospect of the Indian pharmaceuticals industry. Pharmaceuticals companies are forced to reduce their research and development (R&D) spending due to slowdown of growth in last few years which is also expected to hamper growth of the Indian pharma market as new drugs revenue form large part of pharma firm's revenue due to exclusivity of the drug.

U.S., South Africa, United Kingdom, Nigeria and Russia were the top five countries importing Indian pharmaceuticals and accounted for 48.58% of the total export revenues earned by Indian pharmaceutical industry in 2018.

The top ten Indian pharmaceutical importing countries (including Brazil, Australia, Kenya, Nepal and Philippines) accounted for 56.68% of the total export revenues earned by Indian pharmaceutical industry in 2018.

U.S., Germany, Switzerland, China and France were the top five countries exporting pharmaceutical products to Indian market and accounted for 48.80% of the total imports by Indian pharmaceutical industry in 2018.

The top ten Indian pharmaceutical importing countries (including Denmark, Belgium, Italy, Brazil and Indonesia) accounted for 71.77% of the total imports by Indian pharmaceutical market in 2018.

Navadhi has provided detailed company profiles including their position in Indian pharmaceuticals market value chain, financial performance analysis, product wise business strategy, competitive landscape and SWOT analysis for 10 key players in Indian pharmaceuticals market namely: Abbott India Limited, Aurobindo Pharma Limited, Biocon Limited, Cipla Limited, Divis Laboratories Limited, Dr. Reddy's Laboratories, IPCA Laboratories Limited, Lupin Limited, Sun Pharmaceuticals Limited and Torrent Pharmaceuticals Limited.

Scope of the India Pharmaceuticals Industry Analysis and Trends 2023 Report

- This report provides detailed information about Indian pharmaceuticals market including future market forecasts up to 2023.
- This report identifies the need for focusing on Indian pharmaceuticals market.
- The report identifies the growth drivers and inhibitors for Indian pharmaceuticals market.
- This report provides information about policies related to pharmaceuticals industry in India.
- This report provides information about industry associations and government bodies related to Indian pharmaceuticals industry.
- The report identifies various risks associated with Indian pharmaceuticals market.
- This report has detailed profiles 10 key players in Indian pharmaceuticals market covering their position in pharmaceuticals value chain, business strategy, financial performance, future forecasts and SWOT analysis.
- This report provides competitive landscape among 10 key companies in Indian pharmaceuticals market.
- This report provides PESTEL (political, economic, social, technological, environmental and legal) analysis for Indian pharmaceuticals market.
- This report provides Porter's Five Forces analysis for Indian pharmaceuticals market.
- This report provides SWOT (strengths, weakness, opportunities and threats) analysis for Indian pharmaceuticals market.
- This report provides information about current and future trends for Indian pharmaceuticals market.
- This report provides information about current and future trends for U.S. pharmaceuticals market.

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Innovative Drugs

Orphan Drugs

Generic Drugs

Commodity Generic Drugs

Branded Generic Drugs

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Biosimilars

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