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Confederation of Indian Industry
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Pharma summit 2010

CII's 8th International Conference
27 November 2010 • St. Larn Hotel • Ahmedabad

"India Pharma Inc.: Discovering India's Growth Potential"



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Highlights of Pharma Summit 2009

The 7th edition of **Pharma Summit 2009**, CII's flagship International Conference for the Indian Pharmaceutical Industry was held on **16 September 2009** at Mumbai. The Summit was an attempt on identifying and

Pharmaceutical Industry. Over 100 CMDs, MDs & CEOs along with 150 cross-functional professionals from the Pharmaceutical Industry participated at the Summit.



understanding the key challenges faced by Indian pharma companies across the key high growth segments to adapt business models, which would convert these opportunities into global success stories. The Summit also focused on the Global Generics, CRAMS, Clinical Research Outsourcing, Domestic Market and New Chemical Entity Research, that would enable Indian Pharmaceutical community to emerge as the global pharma hub.

The Summit also witnessed the release of **"CII-KPMG Study on India Pharma Inc. – Overcoming Challenges to Maximise Potential"** by Mr Jai Hiremath, Chairman - Pharma Summit 2009 and Vice Chairman & Managing Director, Hikal Ltd. It was addressed by international speakers and a galaxy of eminent professionals from the Indian

Summit 2010 Background

As global markets continue to slow down, pharma companies are scanning markets for new growth opportunities, boost drug discovery potential, reduce time to market and squeeze costs along the whole value chain. They have realized that some of the most promising opportunities are found in the emerging nations, which will contribute above 30% to the growth of the sector in the next decade. The huge potential of the Indian pharmaceuticals market is impossible for pharma companies to ignore, given that India will be one of the top 10 sales markets by 2020. 5 out of the top 10 domestic pharma companies are already foreign owned with a consolidated share of 22 – 23%.

India already has a growing pharmaceutical industry of its own, which has recorded a CAGR of 14% over the past five years. Besides, Indian economy is growing strong and so is healthcare expanding to meet the needs of a growing population with changing disease profile.

Focus of this year's Pharma Summit 2010 is to understand the tremendous potential of India's domestic market place, expansion in rural markets and discuss strategies and challenges ahead.

Thus the theme, **"India Pharma Inc.: Discovering India's Growth Potential"**.

"India Pharma Inc.: Discovering India's Growth Potential"

- **Branded Generics:** Foreign companies are increasing their stake in India for its branded generics portfolio. To understand in detail the segments, trends and pricing strategies of market.
- **Rural Markets:** Untapped potential of India's rural market has become the next factor for growth. Need of the hour is to understand the structure and strategies for expanding access and maximizing the opportunities while making the drugs affordable.
- **GST:** How will this affect pharma companies supply chain and distribution. Challenges: Companies are facing issues like counterfeiting, labour attrition, infrastructure bottleneck etc. which are impeding growth. What strategies need to be adopted to curb these challenges?
- **Road Ahead:** Given the changing dynamics of the industry and challenges ahead what are the imperatives for growth and how should companies rearrange their business models to realize this potential and convert these opportunities into success stories.

Session Highlights:

- ☛ "India Pharma Inc.: Untapped Potential of Indian Market"
- ☛ "India Pharma Inc.: Regulatory & Pricing Scenario"
- ☛ "India Pharma Inc.: Challenges and the Road Ahead"

★ CEO's Interactive Roundtable: "Opportunities for Growth in the Domestic Pharma Market"

Enablers:

- ▶ Favourable socio-economic environment at the back of strong and growing economy
- ▶ Changing disease profile
- ▶ Growing middle class population with higher disposable income to afford quality healthcare
- ▶ Deepening of health insurance
- ▶ Penetration into the rural markets
- ▶ Anticipated changes in regulatory e.g. GST to enable supply chain efficiencies
- ▶ Increase in Government spend on healthcare infrastructure

Summit Objectives:

The Summit will focus on the potential and the challenges that exist in the domestic Indian pharma market. Further, it will also look at the important strategies and business models that Indian pharma companies can adopt in order to tap the immense potential.

- Providing a platform for discussion on the Indian branded generics market, its structure and imperatives for growth
- Gaining an understanding of the Indian rural market-its definition, potential and required novel business models
- Outlining government regulations surrounding the pharma industry and how these can be used to push the industry forward
- Identifying and overcoming the important challenges that roadblocks in path to making India a top ten sales market by 2020
- Outlining the growth of infrastructure and penetration of the healthcare industry

Key Concerns:

- Potential for price controls imposed on new drugs under the DPCO
- Gaps in healthcare, physical and educational infrastructure
- Low penetration of health insurance
- Managing human resources - Labour attrition and shortage of skilled talent
- Resolution on data exclusivity and protection
- Counterfeiting

Key Take Aways:

- Identifying key imperatives to realize India's full potential and be a top 10 sales market by 2020
- Identifying critical success factors for building a strong brand
- Identifying rural market strategies to maximise the potential & reach
- Identifying pricing and channel strategies to make drugs more affordable and accessible to the growing population
- Identifying impact of GST, pricing policies, regulations and strategies to maximize efficiencies across the value chain
- Identify role & linkages of various important stakeholders' in providing affordable drugs to India's growing population in a price sensitive market
- Identifying key challenges and strategies to climb the next level of growth

Registration only by Invite
for professionals from the
Pharmaceutical Industry

Procedure for enrolling:

- Please use the enclosed Delegate Registration Form to send in your nominations
- Pre-registration is mandatory

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Infrastructure



Confederation of Indian Industry
Since 1895

The Confederation of Indian Industry (CII) works to create and sustain an environment conducive to the growth of industry in India, partnering industry and government alike through advisory and consultative processes.

CII is a non-government, not-for-profit, industry led and industry managed organisation, playing a proactive role in India's development process. Founded over 115 years ago, it is India's premier business association, with a direct membership of over 8100 organisations from the private as well as public sectors, including SMEs and MNCs, and an indirect membership of over 90,000 companies from around 400 national and regional sectoral associations.

CII catalyses change by working closely with government on policy issues, enhancing efficiency, competitiveness and expanding business opportunities for industry through a range of specialised services and global linkages. It also provides a platform for sectoral consensus building and networking. Major emphasis is laid on projecting a positive image of business, assisting industry to identify and execute corporate citizenship programmes. Partnerships with over 120 NGOs across the country carry forward our initiatives in integrated and inclusive development, which include health, education, livelihood, diversity management, skill development and environment, to name a few.

CII has taken up the agenda of "Business for Livelihood" for the year 2010-11. Businesses are part of civil society and creating livelihoods is the best act of corporate social responsibility. Looking ahead, the focus for 2010-11 would be on the four key Enablers for Sustainable Enterprises: Education, Employability, Innovation and Entrepreneurship. While Education and Employability help create a qualified and skilled workforce, Innovation and Entrepreneurship would drive growth and employment generation.

With 64 offices and 7 Centres of Excellence in India, and 8 overseas in Australia, China, France, Germany, Singapore, South Africa, UK, and USA, and institutional partnerships with 223 counterpart organisations in 90 countries, CII serves as a reference point for Indian industry and the international business community.

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