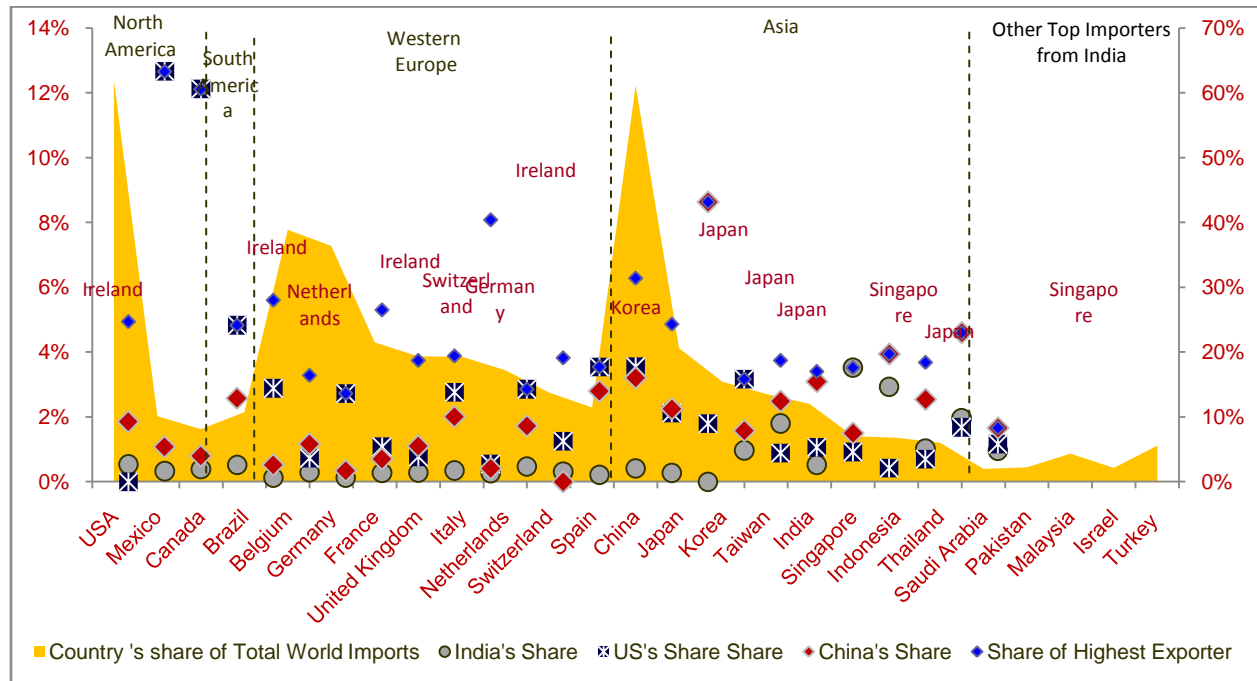


Pharmaceuticals – Market Composition

In this section, the top exports markets for each segment within Pharmaceutical Industry were identified and then contribution of India vis-à-vis other competing countries in each market's imports was mapped.

Bulk Drugs



Source: International Trade Centre Trade Statistics, D&B Analysis

USA and China were the leading exporters of pharmaceuticals bulk drugs in the world in 2010. However, Japan had an edge in top Asian importing countries which is also evident from its share in these countries. On the other hand, Ireland was competitive in Western European countries.

India does not figure among the top 10 exporters of the pharmaceuticals bulk drugs market in the world. The gap between India and other top performing nations like USA, China, Ireland and Japan was substantially high. India had relative advantage only in Saudi Arabia. Further, India also had relatively lower gap in countries like Indonesia, Pakistan Israel and Turkey.

In order to achieve global competitiveness in pharmaceuticals bulk drugs export, India needs to benchmark various levers like regulatory & policy environment and productivity & efficiency parameters with USA, China and select countries like Ireland and Japan. It may also be probed to understand the sources of advantage of India in Saudi Arabia.

*Note: (In absence of exact definition of HS Codes we have taken HS Code 29 (Organic Chemicals) for bulk drugs)