



# Maharashtra Pharmaceutical Sector

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# Magnetic Maharashtra

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# Maharashtra — The enduring leader

## Macro Economic Profile for Maharashtra



The State attracts the highest FDI Investment — INR 97,799 crore (Aug '91 – March '12)

<b>GSDP contribution</b>	<b>14.4 per cent of India GDP at current prices for 2011-12</b>
Per Capita Income	INR 95,339 (at current prices)
Employment	14.58 per cent of India
Exports	21.4 per cent of India
Industrial output	16.7 per cent of India ( as per the Annual Survey of Industries 2009-10)
Industry growth rate	9.1 per cent. (2010-11 E)

Source: Economic Survey of Maharashtra, 2012-13

# Maharashtra — The enduring leader

## Macro Economic Profile



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### Road and Railways

- ▶ 99.2 per cent of the villages are well connected with all weather roads in the state
- ▶ 9.2 percent of total railway network in the country
- ▶ 2 Major Railway zones
- ▶ Dry Ports — Truck terminals and Railway sidings for easy freight movement

### Industries

- ▶ Industrial Investment — Projects approved are 17779 inviting proposed investment of INR 9,50,972 Cr.
- ▶ Employment to be generated by the proposed projects is nearly 4 million that is nearly 20 per cent of national average
- ▶ FDI proposed investment INR 97799, 23 per cent of India

### Air and Water Ports

- ▶ 4 International and 5 Domestic Airports
- ▶ 6 MIDC airstrips
- ▶ 3 Major ports
- ▶ 21.76 per cent of the total cargo traffic of the major ports in India is handled by the JnPT and MbPT ports
- ▶ 53 Minor ports

### Electricity

- ▶ Total State generation 83017 Million kwh nearly 10 per cent
- ▶ Total consumption 87396 Million kwh more than 14 per cent of India
- ▶ Industrial consumption is at 34416 Million kwh more than 15 per cent of India

Source: Economic Survey of Maharashtra, 2012-13

The total FDI investment in the Drugs and Pharmaceutical sector from August' 1991 till March 2012 was INR 1012 crore

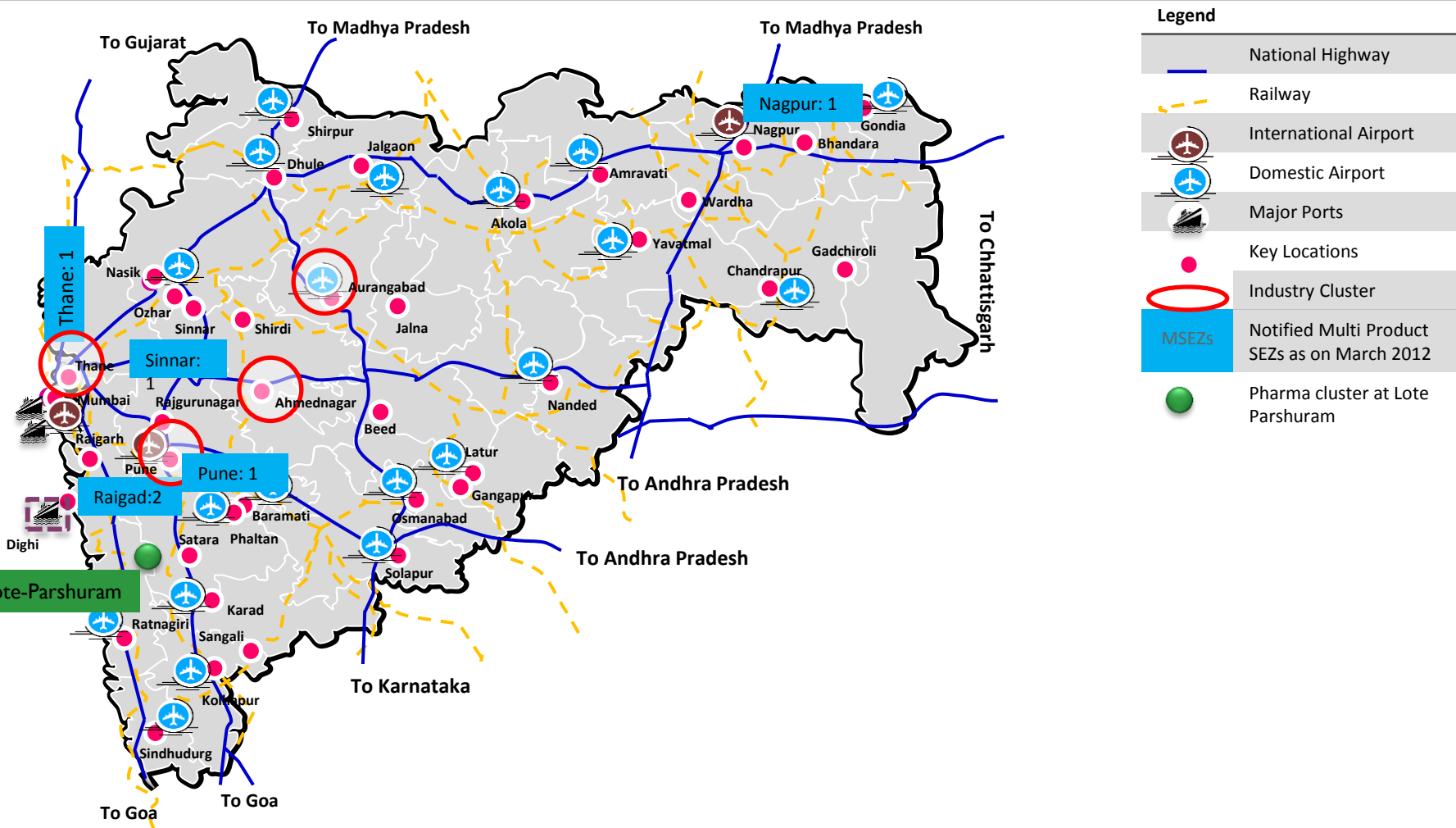
- ▶ The Indian Pharmaceutical market is broadly classified into four segments — Active Pharmaceutical Industry (API), Contract Research and Manufacturing Services (CRAMS), Formulations and Biosimilars. API is the largest segment of the Indian pharmaceuticals industry with a market of USD 8.7 B as of 2010
- ▶ The Indian pharma industry has been growing at a compounded annual growth rate (CAGR) of more than 15 per cent over the last five years and has significant growth opportunities.
- ▶ In recent years, several foreign players have made acquisitions in India to get a foothold in the country's pharma market and leverage on the technical and cost efficiency of Indian companies. Increasing number of companies are forming JVs to benefit from research and development; large firms from developed markets are venturing with Indian majors to develop new medicines
- ▶ The major clusters in the state are Mumbai, Thane, Tarapur, Aurangabad and Pune. Also, a new Pharma cluster has been earmarked in the region of Lote-Parshuram in Ratnagiri
- ▶ Maharashtra has a strong R&D base with major centres as Bioresearch Centre, Bioinformatics Centre, Serum Institute etc. Maharashtra has 3,139 Pharmaceutical manufacturing units
- ▶ Drugs & Pharmaceuticals contribute to 2.9 per cent of state FDI project proposals

# Growth Drivers

# Infrastructure



Lote-Parshuram has been promoted as the new Pharma Cluster

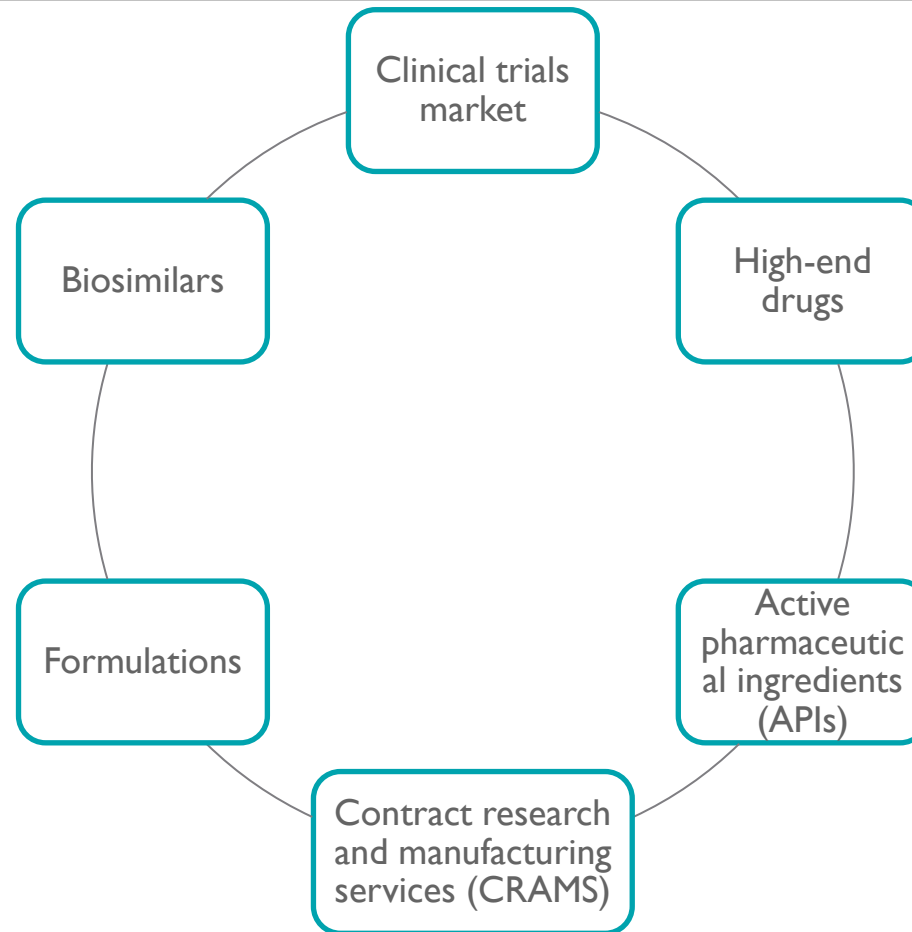


Legend	
	National Highway
	Railway
	International Airport
	Domestic Airport
	Major Ports
	Key Locations
	Industry Cluster
	MSEZs Notified Multi Product SEZs as on March 2012
	Pharma cluster at Lote Parshuram

# Key Opportunities



The following sectors present key opportunities in the Pharmaceutical Sector



Maharashtra has a literacy rate of 82.9 per cent with a large base of skilled and industrial labor

- ▶ The Govt. is promoting "Centers of Excellence", which will cover all aspects of cutting edge research and development in emerging areas of life sciences and technology
- ▶ The state also has one of the Indian Institutes of Technology (IITs) at Powai in Mumbai, part of the country's renowned network of engineering and technology institutions. IIT Mumbai has 13 departments and various centers for R&D
- ▶ Top universities in the state like the University of Mumbai, University of Pune, Nagpur University, Bhartiya Vidyapeeth etc. provide courses for graduation/post graduation/ Phds in pharmacy
- ▶ The state has 46 government and government aided institutes with a intake capacity for 2474 students
- ▶ With almost 13 per cent of the total institutes, the pharmaceutical institutes have a total enrolment of 51826

## Manpower strength in Maharashtra

Sector	Institutions	Capacity
Pharmacy	465	27198
Management Sciences	508	60100
Industrial Training Institutes	766	1,54,710



# Government Policy and regulatory support



## Government Initiatives

- ▶ Greenfield investments in the pharmaceutical sector will be permitted up to 100 per cent FDI under automatic route. Brownfield projects will be permitted up to 100 per cent FDI with FIPB approval
- ▶ Budget 2010–2011 reduced the customs duty from 10 per cent to 5 per cent on imports of select life saving drugs, conjugate vaccine and Micafungin sodium for injection
- ▶ Patent and proprietary medicines included under chapter 30 of the Customs Tariff Act, 1975 which are imported for retail sale are exempted from special additional duty

### State policy support

Industrial Promotion Subsidy (IPS)

Incentives for Cleaner Production

Incentives for Technology Up gradation

Interest Subsidy

Exemption from Electricity Duty

Waiver of Stamp Duty

Royalty Refund

Incentive for Water Conservation

Incentive for Water & Energy Audit Subsidy

Incentive for Water & Energy Subsidy

### Relevant documents to refer to:

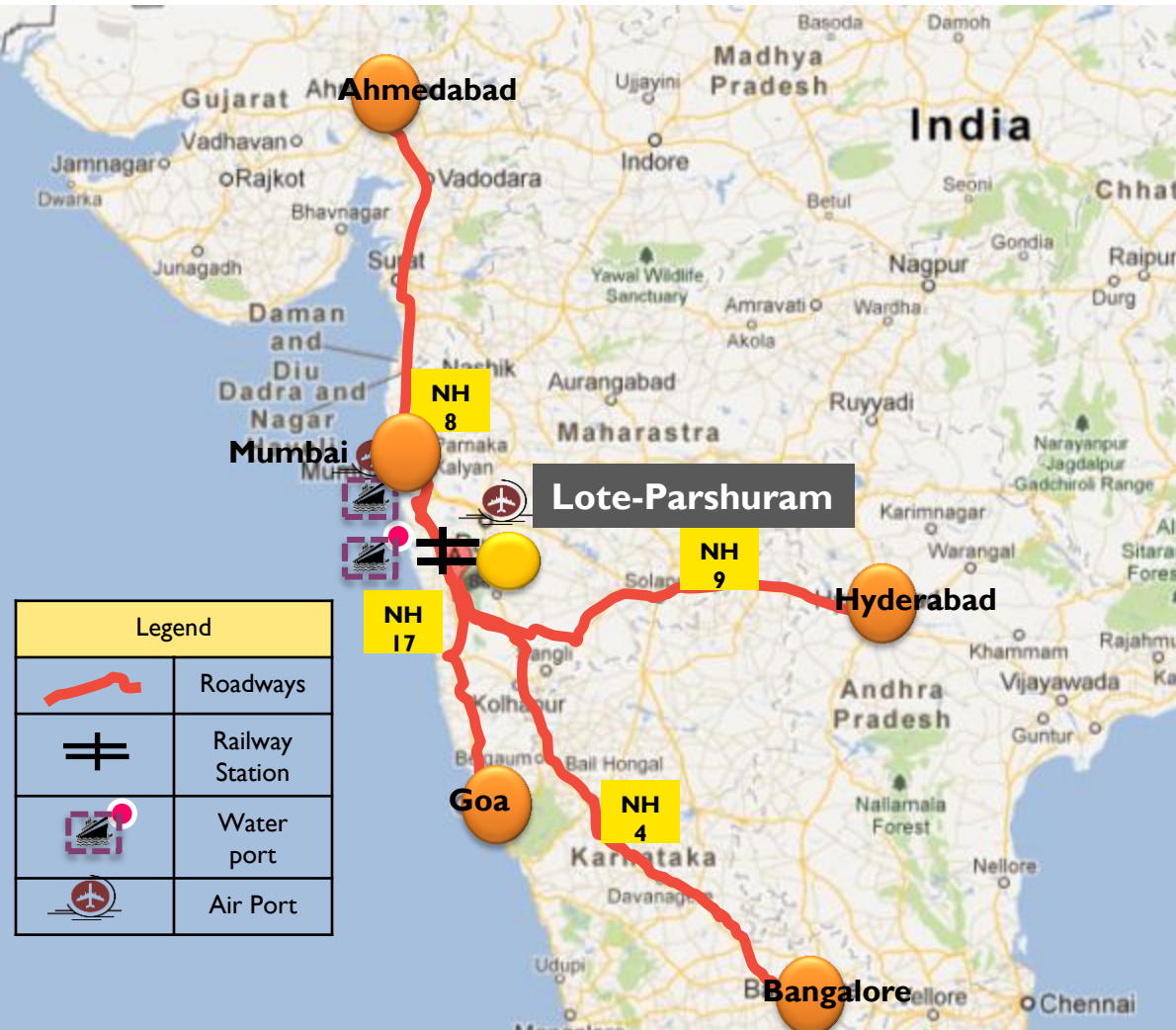
- ▶ Maharashtra Industrial Policy 2013
- ▶ Maharashtra Biotechnology Policy 2001
- ▶ Package Scheme of Incentives 2013
- ▶ Maharashtra SEZ Policy 2001

# The Pharma Hub

## *Lote-Parshuram, Ratnagiri*

# Lote-Parshuram, Ratnagiri

## External Connectivity



### Location Information

It is established on both sides of Mumbai-Goa national highway 17. This area is 12 km from Chiplun taluka (towards Mumbai) and 17 km from Khed taluka (towards Goa) and 115 km from Ratnagiri district.

### Site connectivity

- Road: Area is situated along with the Mumbai-Goa NH 17 about 23 Km away from the Chiplun City and 12 Km away from Khed
- Rail : Nearest railway station is Khed which is 12 Km away
- Airports:- Mumbai (227 Km) & Pune (201 Km) are the nearest international airports
- Water Ports: (i) Jaigad JSW (E) (175 Km) (ii) Kanoji Aangre Port (iii) JnPT (212 Km)

# Key players

# Maharashtra Pharmaceutical Sector Key Players




For further enquiries ..



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