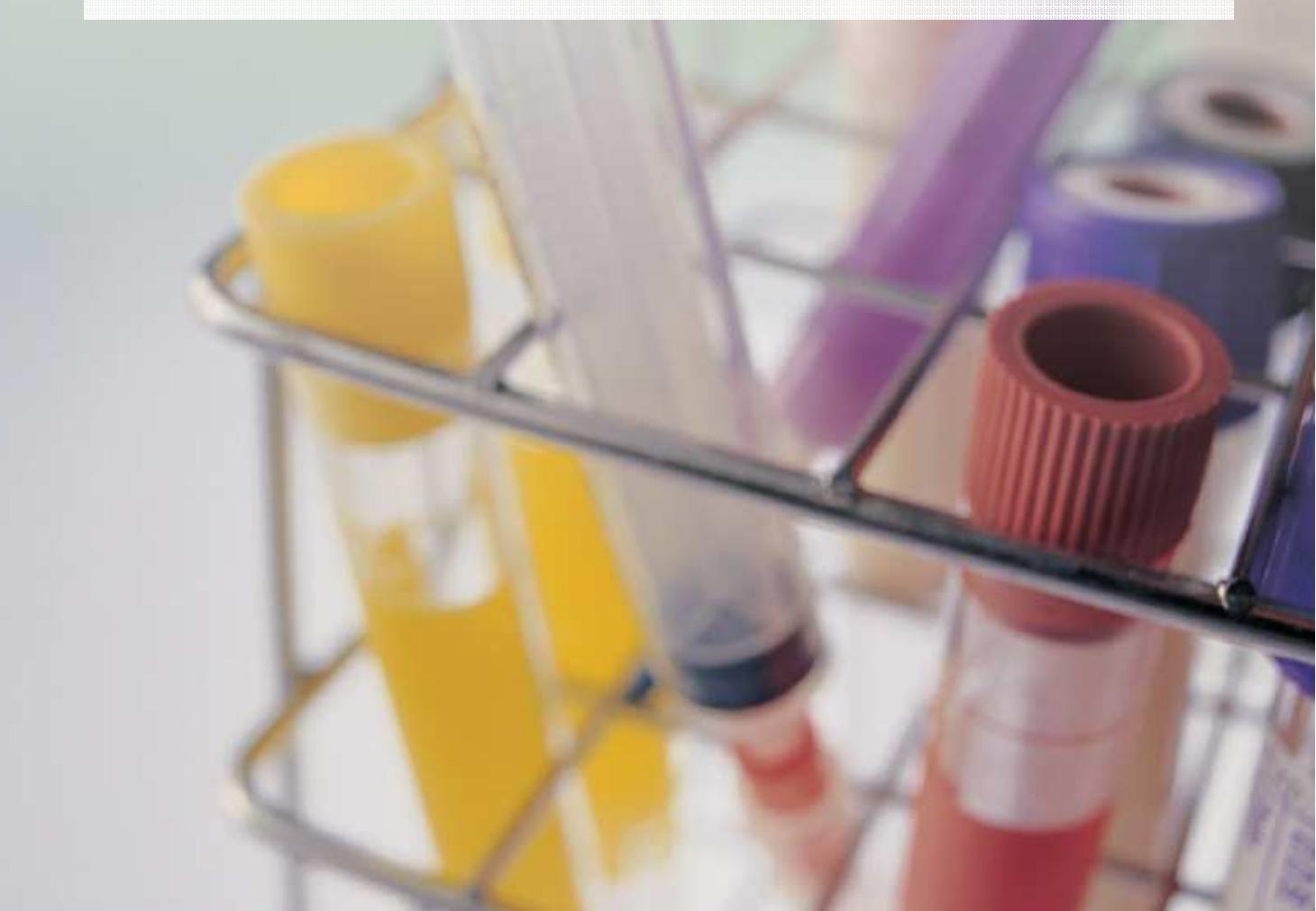




2008–2009 年印度医药制剂行业研究报告

Indian Pharmaceutical Formulations Industry Report, 2008–2009



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语种	中文	电子版价格	6000	纸质版价格	5000		
摘要	<p>本报告以 120 多幅图表资料，详细展示了印度医药制剂行业的发展现状和未来趋势。</p> <p>在全球医药市场中，印度医药产业扮演着重要的角色。2005 年，向美国 FDA 提交的药物主文件（DMFs）有 2/5 来自印度。目前，印度医药产业能够生产 400 多种原料药、6 万多种制剂，其中原料药的 60% 和成药的 25% 都已出口到国际市场。</p> <p>以医药产品的价值来衡量，印度位居全球第 14 位。印度前 10 大制药公司每年有超过 50% 的产量出口到世界各地。印度药品的出口价值大约为 58 亿美元。由于质量稳定、价格低廉，其出口份额仍在不断上升。</p> <p>印度制剂出口市场主要是美国、西欧和俄罗斯，基本上是专利药品到期后的仿制品，特别是重要药物的专利过期产品，如氟西汀、环丙沙星、奥美拉唑等。但同样起步于仿制药的印度制药企业并非单纯的仿制，而是仿中有创，重视申请工艺技术专利，大力出口增值创新型仿制药。例如：Lupin Laboratories 公司开发出不侵犯已有专利技术（日本武田公司所有）的头孢噻肟；Ranbaxy 公司将其开发的环丙沙星 ciprofloxacin 一日一次缓释制剂授权给德国拜耳公司经营。</p> <p>为了分散市场风险，印度医药企业不但在欧美市场继续扩张，同时也进军中国、日本、巴西和墨西哥等医药新市场。根据麦肯锡预测，印度医药行业 2010 年市场价值达到 250 亿美元，而其国内市场价值将于 2015 年达到 200 亿美元。目前，印度医药企业能够满足本土约 100% 的制剂产品和 70% 的原料药需求。</p> <p>印度制药行业拥有足够数量的高素质和充满活力的科学家，在工艺化学和制药科学领域具备专门的知识。其与美国 FDA 及其他国际监管机构频繁接触，并且建立起了高质量的生产设施，这些因素进一步增强了它的实力。与美国等其他发达国家相比，在印度招募病人和开展临床试验较为容易，实施临床试验的成本也更加便宜。印度有着强大的 IT 技能对临床数据进行管理。</p> <p>印度的劳动力成本要比美国低 70%，在印度设立一家得到 FDA 认可的工厂所需的费用要比美国便宜 30%。跨国制药公司已经开始将中间体、原料药和仿制药的生产业务外包给印度和中国等国家。</p> <p>本报告提供了在印度开展医药制剂业务的 30 家医药公司的详细分析，包括公司简介、过去几年的营业收入和净利润、主要产品品牌、市场分布和未来发展规划等资料。</p>						
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Title	Indian Pharmaceutical Formulations Industry Report, 2008-2009	Pages	119
Price	PDF US \$ 999 Hard Copy US \$ 899 Enterprise wide US \$ 1,499	Release Date	Apr/2009
Abstract	<p>India plays an important role in the global pharmaceutical market. In 2005, 2/5 DMFs to FDA were submitted by India. Currently, there are more than 400 kinds of API (Active Pharmaceutical Ingredient) and over 60,000 kinds of pharmaceutical formulations are available in Indian market, and 60% of API and 25% of patent medicine are exported.</p> <p>In terms of the medical product value, India ranks at the fourteenth worldwide. Over half output of the top ten Indian pharmaceutical companies are exported to oversea markets each year, with a total value of US \$5.8 billion approximately.</p> <p>Indian pharmaceutical formulations are mainly exported to the U.S.A, western Europe and Russia, are basically the generic drugs with expired patent, especially the primary ones such as Fluoxetine, Ciprofloxacin and Omeprazole etc. However, India also engaged in the innovations. For example, Lupin Laboratories self-developed the cefotaxime without</p>		

	<p>infringing the patent of Takeda Pharmaceuticals.</p> <p>Apart from the constant expansion in the U.S.A and European markets, Indian pharmaceutical companies also target on the new markets such as China, Japan, Brazil and Mexico etc. in order to decentralize market risks. According to the McKinsey, the Indian pharmaceutical market value will reach as high as US \$25 billion in 2010.</p> <p>India has numerous talented scientists who specialized in the chemicals and pharmaceutical. It has close contact with the FDA and other international supervision institutions. Furthermore, it also has high-quality pharmaceutical production facilities. Compared to the developed countries, it is easier for India to conduct the clinical trial and also a lower cost. India also has strong IT capability to support the clinical data management.</p> <p>The labor cost in India is 70% lower than in the U.S.A. The expenditure for establishing a pharmaceutical factory with FDA approval in India is only 70% of that in the U.S.A. The multinational pharmaceutical companies have already outsourced the API, intermediates and generic drugs production to India and China etc.</p>
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