



Consulate General of India  
Frankfurt

# **Pharmaceutical Industry:**

## Analysis and Scope of Partnership between India and Germany

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## **Executive Summary**

The Pharmaceutical Industry in Germany has maintained a significant position in the world from the very beginning. In 2017, Germany exported Pharmaceutical products worth nearly 72 Billion. Pharmaceutical exports was the third largest export sector in Germany. The percentage growth of pharmaceutical export was around 7.38 compared to 2016. More than 660 pharmaceutical companies of German origin and subsidiaries of multinational corporations are based in Germany. Due to the quality standards maintained by German companies Pharma products made in Germany are popular worldwide. The export figures for the pharmaceutical industry relative to total production have been constantly growing over the years. Germany is Europe's largest and the world's fourth largest Pharmaceutical market after USA, Japan and China.

The need for digital healthcare solutions worldwide is already enormous and still growing. The technologies have the potential to improve first and foremost patient management, efficiency in service provision, networking of patients and all providers, and personalization of health services. Germany's digital healthcare sector is already able to offer internationally competitive products and services in a number of fields of application.

Indian pharmaceutical Industry is one of the fastest growing globally. India was the largest provider of generic drugs globally the last year. Indian pharmaceutical sector industry supplies over 50 per cent of global demand for various vaccines, 40 per cent of generic demand of vaccines in the US and 25 per cent of all vaccines in UK. The population structure in India ensures a skilled young work force in India can ensure that the Industry maintains its equilibrium and grows constantly. Presently over 80 per cent of the antiretroviral drugs used globally to combat AIDS (Acquired Immune Deficiency Syndrome) are supplied by Indian pharmaceutical firms. Medicine spending in India is expected to increase at 9-12 per cent Compound Annual Growth Rate between 2018-22 to US\$ 26-30 billion. This is driven by factors like increasing consumer spending, rapid urbanisation and raising healthcare insurance among others. Going forward, better growth in domestic sales would also depend on the ability of companies to suit their product portfolio towards chronic therapies for diseases such as such as cardiovascular, anti-diabetes, anti-depressants and anti-cancers.

Indo-German collaborations have been improving the economy of both the nations. The Indo-German collaboration works in different areas, health technologies are one of the best among them. There are many German pharmaceutical companies that have

presence in India. Indo-German partnership in the healthcare sector is scaling new heights with new collaborative projects. With India's Make in India Initiative and with India having scaled up many rankings in the World Bank's Report of Ease of Doing Business, all factors point at the increasingly attractive investment destination that India has become.

There has been a steady increase in joint ventures and acquisitions between Indian and German pharmaceutical companies. The cost of production in India is very affordable for pharmaceutical manufacturers making India an attractive investment destination. The production costs are 65% lower than that in US and 50% lower than in Europe.

Further, with India's population volume of more than 1 Billion and an increasing requirement for addressing the health needs of its population, there is scope for an accelerated advancement in the pharmaceutical sector. The market for the medical and health technology is vast in both India and Germany. Most of the companies based in Germany are specialists in the world market in terms of providing niche health technology in various treatment procedures. India has a fast growing population and the need for health technology is the need of the hour.

## **The German Pharmaceutical Industry: An Overview**

The pharmaceutical sector in Germany has a long tradition to look back to what is widely known as “world’s pharmacy.” The German pharmaceutical Industry is a significant global partner mainly due to the demand for high quality standards. The country stands out because of its cutting edge research and its historically important position in the Pharmaceutical Industry. More than 660 pharmaceutical companies of German origin and subsidiaries of multinational corporations are based in Germany. The German pharmaceutical sector is dominated by Small and Medium Enterprises, among which about 400 companies have fewer than 20 members of staff. The German pharmaceutical sector provides a broad range of high quality products and services and has been addressing the growing international demand. With its population of 82.67 Million, Germany is the Europe’s largest and the world's fourth largest Pharmaceutical market after USA, Japan and China.

The significance of research and development in the pharmaceutical Industry cannot be underestimated. German R&D ranks second only to USA. Germany has a significant position in the global pharmaceutical industry. Increasing life expediencies and declining fertility rates have lead to Germany having a relatively larger population of older people. It is expected that at least one quarter of the German population will be over 65 years of age in 2050. The proportion of the population aged over 80 is expected to almost triple. German pharmaceutical industry is also trying to cope with the demand on healthcare systems due to increasing cases of lifestyle related diseases. According to World Health Organisation, worldwide chronic age related disease prevalence is expected to rise by 57% by the year 2020.

The Export Initiative of the German Healthcare Industry, HEALTH MADE IN GERMANY, provides information and guides foreign individuals and companies who are interested in doing business in and with German healthcare. The Initiative informs potential investors about German industry and is available to answer various questions. Other functions are to promote foreign market access and international network development for German small and medium-sized industries (SMEs).

## **Innovations**

### **Digitalisation of health sector:**

Developments in technology such as digitalisation and industry 4.0 have also found place in the pharmaceutical industry. This increases the potential for efficient research and development processes. The new digital solutions for managing and analyzing patient data can improve the Research and Development of new therapies and diagnostics. The digitalisation of the sector has enabled to provide new drug applications, enhance the effectiveness of treatment and empower patients to actively manage therapies. With strong engineering, plant construction and expertise in pharmaceutical chemistry, the country has the perfect infrastructure for combining cost efficient, IT based innovations with traditional high quality manufacturing processes. Online and real time monitoring in the production plants increases the efficiency further. Another important topic is **big data**, the uses of which are rapidly gaining significance in all aspects of healthcare. Big data solutions combine and process largely unstructured data sets from different sources. One of the great potentials of big data is in the acquisition of new medical knowledge (e.g. prevalence studies, epidemiology, analyses of drug efficiency).

### **Quality Standards:**

German pharmaceutical companies are known to deliver high quality production volumes for variety of products such as antibiotics, hormones, vitamins and radio opaque materials. There has been a steady increase of quality in healthcare around the globe the establishment of health insurance systems in developing countries and new hospital infrastructure have lead to a growing demand for conventional pharmaceutical products. The export revenues for German Pharma sector have steadily increased in emerging markets in Asia.

### **Expertise in Genetic and Rare Diseases:**

The number of Rare and Genetic disorders have increased significantly over the past many years. The advancement of knowledge in understanding the molecular biology of

diseases has become the basis for developing targeted therapies for niche indications and rare diseases. Facilitated approvals for treatment drugs have strengthened innovations in the field of developing solutions for such diseases. These conditions have paved the way for innovations developed by SMEs. According to the European Medicines Agency (EMA) more than 70 percent of the medicines for rare disorders in the EU originate from laboratories of German SMEs and these companies have strong innovative capacities. This is exemplified by growing approvals for commercially undeveloped synthetic pharmaceuticals drugs which treat rare conditions.

### **Technological advances in Research:**

Technological advances in molecular and cell biology largely drive innovation in the pharmaceutical sector. Better understanding of disorders permit new strategies for combating not only symptoms but also actual causes. Personalised medicine has also emerged as a new trend for targeted therapies. German companies have played a substantial role in bringing personalised medicine from lab to clinical practice and subsequently into the market.

## **Indian Pharmaceutical Industry: An Overview**

The Indian pharmaceuticals market is the third-largest in terms of volume and thirteenth-largest in terms of value. The Indian pharmaceutical sector was valued at US\$ 33 billion in 2017 and is expected to expand at a CAGR of 22.4 per cent over 2015-20 to reach US\$ 55 billion. It's amongst the global leaders in providing quality generics to the world. Indian pharmaceutical Industry is one of the fastest growing globally. India was the largest provider of generic drugs globally last year. Indian pharmaceutical sector industry supplies over 50 per cent of global demand for various vaccines, 40 per cent of generic demand in the US and 25 per cent of all medicine in UK. The skilled young work force in India is able to steer the Industry ahead at a tremendous equilibrium. Presently over 80 per cent of the antiretroviral drugs used globally to combat AIDS (Acquired Immune Deficiency Syndrome) are supplied by Indian pharmaceutical firms. India's pharmaceutical exports stood at US\$ 17.27 billion in 2017-18. In 2018-19 these exports are expected to cross US\$ 19 billion.

### **India's Pharma exports to top 10 countries (USD Million)**

Rank	Country	2015-16	2016-17	2017-18	Change% FY-18	Contribution% FY-18
1	U S A	5513.78	5563.54	5116.32	-8.04	29.62
2	SOUTH AFRICA	605.27	484.89	582.99	20.23	3.37
3	U K	563.76	549.81	556.70	1.25	3.22
4	RUSSIA	373.76	383.46	468.74	22.24	2.71
5	NIGERIA	436.61	397.99	466.67	17.26	2.70
6	GERMANY	347.65	333.30	388.43	16.54	2.25
7	BRAZIL	326.17	337.37	383.72	13.74	2.22
8	KENYA	332.48	325.43	254.62	-21.76	1.47

9	AUSTRALIA	232.78	236.87	253.80	7.15	1.47
10	FRANCE	231.76	208.87	251.44	20.38	1.46
Total Of top Ten		8964.04	8821.53	8723.43	-1.11	50.50
Grand Total		16912.01	16785	17275.8	2.92	100.00

(Source: Ministry of Commerce and Industry- GOI)

India's biotechnology industry comprising bio-pharmaceuticals, bio-services, bio-agriculture, bio-industry and bioinformatics is expected grow at an average growth rate of around 30 per cent a year and reach US\$ 100 billion by 2025.

### **Recent Developments in the Indian Pharma sector**

Some of the recent developments/investments in the Indian pharmaceutical sector include 46 merger & acquisition (M&A) deals worth US\$ 1.47 billion witnessed by the Indian pharmaceutical sector. **The Union Cabinet has made an amendment of the existing Foreign Direct Investment (FDI) policy in the pharmaceutical sector in order to allow FDI up to 100 per cent under the automatic route for manufacturing of medical devices subject to certain conditions.** A clause from India's foreign direct investment policy has been removed to clear unintended obstacles which seemed to be delaying potential investments in several technologies, products and services that come under the broad definition of 'medical devices'. This has attracted a wide range of items up to 100 per cent FDI via the automatic route. These include any instrument, apparatus, appliance, implant, material or other articles, whether used alone or in combination, plus any software tool, intended by its manufacturer to be used for diagnosis, prevention, monitoring, treatment or alleviation of any disease or disorder.

The drugs and pharmaceuticals sector attracted cumulative FDI inflows worth US\$ 15.83 billion between April 2000 and June 2018, according to data released by the Department of Industrial Policy and Promotion (DIPP).

### **India's Pharma Exports Panel Wise (USD million)**

<b>Category</b>	<b>2015-16</b>	<b>2016-17</b>	<b>2017-18</b>	<b>Change% FY-18</b>	<b>Contribution% FY-18</b>
Ayush & Herbal Products	363.99	401.69	455.86	13.49	2.64
BULK DRUGS AND DRUG INTERMEDIATES	3597.28	3383.52	3539.38	4.61	20.49
DRUG FORMULATIONS AND BIOLOGICALS	12647.84	12666.44	12908.76	1.91	74.72
SURGICALS	302.9	333.36	371.81	11.53	2.15
<b>Grand Total</b>	<b>16912.01</b>	<b>16785</b>	<b>17275.8</b>	<b>2.92</b>	<b>100.00</b>

(Source: Ministry of Commerce and Industry- GOI)

## **Pharmexcil (Pharmaceutical Export Promotion Council of India)**

Pharmaceutical Export Promotion Council of India (Pharmexcil) is the authorized agency of the Government of India for promotion of pharmaceutical exports from India. It was set up under the provisions of Foreign Trade Policy by the Ministry of Commerce and Industry in May 2004. Various pharmaceutical products, namely, bulk drugs, formulations, Biotech Products, Indian Systems of medicines, herbal products, diagnostics, clinical research, etc. are covered under its purview. Pharmexcil takes up several external trade promotion activities by organizing trade delegations outside India, arranging buyer-seller meetings, international seminars, etc. The agency's headquarters is located in Hyderabad.

### **Role of the Council**

- Make representations to Govt of India and other agencies in India and abroad to get amicable solutions for the common problems of the Industry
- Make suggestions to Govt of India on policy issues relating to Pharma exports.
- Issue of Certificate of Origin
- Issue of RCMC(Registration cum Membership Certificate)
- Organizing Periodical seminars/Interactive meetings on export related issues
- Assisting members to get their MAI(Market Access Incentives)claims refunded from Govt of India
- Organizing Reverse Buyer seller Meetings in India
- Organizing trade delegations
- Expo-cum-Buyer seller Meetings abroad
- Disseminate trade inquiries received from abroad

### **Product Categories**

Products and services falling under purview of Pharmexcil includes:

- Bulk Drugs (APIs) and its Intermediates

- Formulations
- Herbal
- Ayurveda
- Unani
- Siddha
- Homeopathic medicines
- Biotech and Biological products and Diagnostics
- Surgicals
- Nutraceuticals
- Collaborative Research
- Contract manufacturing
- Clinical trials and Consultancy
- IPR & Regulatory

## **Company Visits to understand the German Pharmaceutical Scenario**

As part of the study the CGI Frankfurt reached out to Pharmaceutical companies within the Consulates jurisdiction (Hessen, North RhineWestphalia, Rhineland Palatinate and Saarland). The Consul General Ms. Pratibha Parkar and members of the Commercial team visited companies and had effective discussions. This helped in understanding the German pharmaceutical Industry at closer proximity and also understanding the experiences of the companies in their Indian Investments. The visits also enabled us at the Consulate to understand the bottlenecks faced by the organisations in India. The opportunity also enabled us to inform the companies about the structural reforms undertaken by the government which has improved the investment scenario in India and encouraged the companies in considering India in their future expansion plans. The visits also helped in further improving Company's perception of India. (*For details of Companies visited please refer Annexure*)

### **Company Visits in Pharma Sector**

1	<b>Merck</b>	Darmstadt	Pharmaceuticals	<ul style="list-style-type: none"><li>• Mr. Simon Sturge, Chief Operating Officer, Biopharma</li><li>• Ms. Saraswati Khan, Chief of Staff to COO</li><li>• Mr. Chrysanthus Herrera from the Corporate Affairs Team</li></ul>
2	<b>FIZ</b>	Riedberg	Biotechnology	<ul style="list-style-type: none"><li>• Dr. Christian Garbe, Managing Director</li></ul>
3	<b>Human GmbH</b>	Wiesbaden	Diagnostic Tools	<ul style="list-style-type: none"><li>• Mr. Ralph Neuberger, Managing Director</li></ul>

				<ul style="list-style-type: none"> <li>• Dr. Arvinder Singh, Country Manager Human India</li> </ul>
4	<b>Fresenius</b>	Bad Homburg	Medical care	<ul style="list-style-type: none"> <li>• Mr. Joachim Weith, Senior Vice President, Corporate Communications &amp; Governmental Affairs</li> <li>• Ms. Petra Hoheisel, Senior Manager, Fresenius Representative Office Berlin</li> <li>• Mr. Hrishikesh Kulkarni, Senior Vice President Fresenius Kabi, Global Medical, Clinical &amp; Regulatory Affairs</li> </ul>
5	<b>Stada</b>	Bad Vilbel	Pharmaceuticals	<ul style="list-style-type: none"> <li>• Mr. Frank Staud, Executive Vice President Corporate Communications, Branding &amp; Sponsoring</li> <li>• Mr. Christian Goertz, Director Corporate Brand Communications &amp; Media Relations</li> </ul>
6	<b>Biotest</b>	Dreieich	Plasma Products	<ul style="list-style-type: none"> <li>• Dr. Georg Floß, Chief</li> </ul>

			<p>Operating Officer</p> <ul style="list-style-type: none"> <li>• Dr. Fabian Peissker, Head of Medical Education Region Middle East/Africa/France</li> <li>• Mr. Henrik H. Oehme Vice President-MEA/Indian Sub Continent/France</li> <li>• Mr. Markus Bernard Regional Director Middle East and Gulf</li> </ul>
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During the visit the Consul General interacted with members both from the management board and heads of India operations.

## **Initiatives of the Government of India and Opportunities provided there-by**

Driven by increasing consumer spending, rapid urbanisation, and raising healthcare insurance medicine spending in India is expected to increase at 9-12 per cent CAGR between 2018-22 to US\$ 26-30 billion. The Indian government has taken many steps to reduce costs and bring down healthcare expenses. Speedy introduction of generic drugs into the market has remained a focus area and is expected to benefit the Indian pharmaceutical companies. In addition, the thrust on rural health programmes, lifesaving drugs and preventive vaccines also augurs well for the pharmaceutical companies.

Healthcare has been recognized as one of India's largest sectors - both in terms of revenue and employment. Healthcare comprises hospitals, medical devices, clinical trials, outsourcing, telemedicine, medical tourism, health insurance and medical equipment. The Indian healthcare sector is growing at a fast pace due to its strengthening coverage, services and increasing expenditure by public as well private players. The Government or the public healthcare system comprises limited secondary and tertiary care institutions in key cities and focuses on providing basic healthcare facilities in the form of primary healthcare centres (PHCs) in rural areas. The private sector provides majority of secondary, tertiary and quaternary care institutions with a major concentration in metros, tier I and tier II cities.

The increasing number of well-trained medical professionals add to India's competitive advantage. India also provides cost effective facilities as compared to other countries both in Asia and in the West. The cost of surgery in India is about one-tenth of that in many other countries. India is a land full of opportunities for potential investors in the medical devices industry. India's healthcare industry is one of the fastest growing sectors and in the coming 10 years it is expected to reach \$275 billion. The country has also become one of the leading destinations for high-end diagnostic services with tremendous capital investment for advanced diagnostic facilities, thus catering to a greater proportion of population. Besides, Indian medical service consumers have become more conscious towards their own healthcare.

The diversified nature of Indian healthcare sector makes it full of opportunities in every segment which includes providers, payers and medical technology. With the increase in the competition, businesses are looking to explore for the latest dynamics and trends which will have positive impact on their business. India's competitive advantage has increased with improved pace of Indian companies getting Abbreviated New Drug Application (ANDA) approvals. India also offers vast opportunities in R&D as well as medical tourism. The vast opportunities for investment in healthcare infrastructure in both urban and rural can be utilized by foreign investors.

## **Some select Government of India Initiatives include**

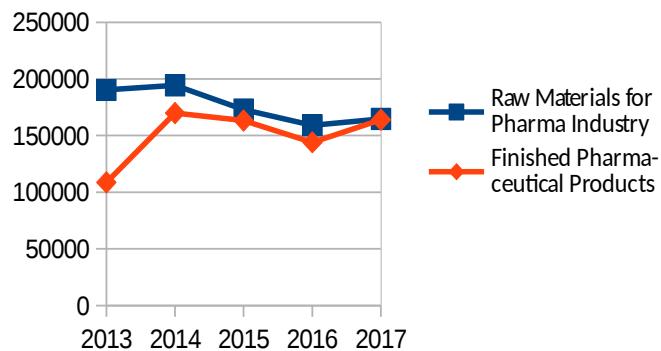
- The Government of India unveiled 'Pharma Vision 2020' aimed at making India a global leader in end-to-end drug manufacture. The vision aims at making India a global leader in end-to-end drug manufacturing. Such positive developments and investments in the pharma sector are likely to create more demand for laboratory, analysis and diagnostics. This implies increased usage of laboratory instruments and allied technologies by pharmaceutical companies and research labs. Further, the approval time for new facilities has been reduced to boost investments.
- The National Health Protection Scheme is the largest government funded healthcare programme in the world, which will benefit economically challenged families in the country by providing a cover of up to Rs 5 lakh (US\$ 7,723.2) per family per year for secondary and tertiary care hospitalization. The programme was announced in Union Budget 2018-19.
- The Central Board of Excise & Customs, Government of India has taken up implementation of the Single Window Project to facilitate the Trading Across Borders in India. The '**India Customs Single Window**' would allow importers and exporters, the facility to lodge their clearance documents online at a single point only. Required permissions, if any, from other regulatory agencies would be obtained online without the trader having to approach different agencies. The Single Window Interface for Trade (SWIFT), would reduce interface with Governmental agencies, dwell time and the cost of doing business.
- The Government of India is planning to set up an electronic platform to regulate online pharmacies under a new policy, in order to stop any misuse due to easy availability.
- The government introduced mechanisms such as the Drug Price Control Order and the National Pharmaceutical Pricing Authority to deal with the issue of affordability and availability of medicines.

## Pharmaceutical Industry: An Opportunity for Indo-German Collaborations

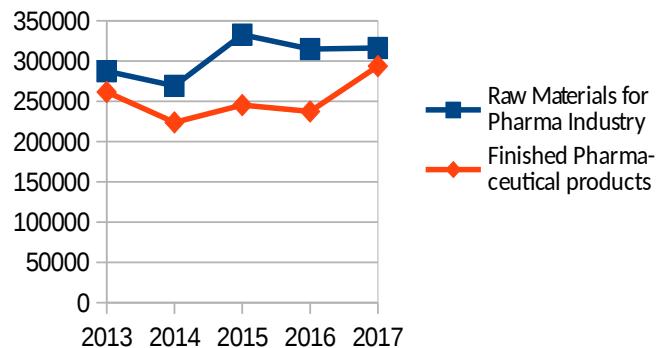
Pharmaceutical industry is one of the key sectors which has been earmarked under the “Make in India initiative” of the Government of India. Germany’s health care sector is a highly attractive market with significant growth opportunities. A steady increase in life expectancy levels have lead to a rise of chronic and age related diseases. Health expenditure in Germany exceeded the threshold of 1 billion euros per day for the first time in 2017. Compared with 2016, the Federal Statistical Office (Destatis) forecasts a 4.9% increase in health expenditure to 374.2 billion euros in 2017. From 2015 to 2016, an increase of 3.8% to 356.5 billion euros, or 4,330 euros per inhabitant, had been recorded. This was a share of 11.3% of the gross domestic product.

India is one of the most populated countries of the world and the Indian market has made it an attractive destination for foreign investment. India has a healthy trade relationship with many European countries. Germany has the highest trade volume with India compared to other EU States. This relationship has further scope for improvement and could play a huge role in the Indian economy.

Growth of India's Pharmaceutical Imports from Germany



## Growth of India's Pharmaceutical exports from Germany



Source: Destatis

India and Germany have a robust cooperation in many fields and health technologies are one of the best among them. There are many German pharmaceutical companies that already have production units in India. Indo-German partnership in the healthcare sector is scaling new heights with the new collaborative projects.

The market for the medical and health technology is vast in both these countries and it will be beneficial for the people of both the countries and also beneficial for the investors too.

Most of the companies based in Germany are specialists in the world market in terms of providing niche health technology in various treatment procedures. India has a fast growing population, and the need for health technology is the need of the hour.

## Annexures

Dates	Trade Fairs in Germany
04.01.- 06.01.2019	c-fit - Messe für Lifestyle - Sport - GesundheitChemnitz, Germany
25.01.- 27.01.2019	MEDIZIN/TheraPro - Trade fair and congressStuttgart, Germany
08.02.- 10.02.2019	PARACELSUS MESSE Wiesbaden - mit VeggieWorld Die Messe für den nachhaltigen LebensstilWiesbaden, Germany
07.03.- 09.03.2019	therapie Leipzig - Trade Fair and Congress for Therapy, Medical Rehabilitation and PreventionLeipzig, Germany
15.03.- 16.03.2019	Interpharm - Pharmaceutical Exhibition and CongressStuttgart, Germany
02.04.- 04.04.2019	ALTENPFLEGE - The Care FairNuremberg, Germany
04.04.- 07.04.2019	FIBO - The Leading International Trade Show for Fitness, Wellness and HealthCologne, Germany
09.04.- 11.04.2019	DMEA - Connecting Digital HealthBerlin, Germany
09.04.- 11.04.2019	POWTECH - World Leading Trade Fair for Processing, Analysis, and Handling of Powder and Bulk SolidsNuremberg, Germany
03.05.- 05.05.2019	Die 66 - Deutschlands größte 50plus MesseMunich, Germany
07.05.- 09.05.2019	T4M - Technology for Medical DevicesStuttgart, Germany
10.05.- 11.05.2019	LEBEN UND TODBremen, Germany
16.05.- 18.05.2019	REHAB - Rehabilitation   Therapy   Care  InclusionKarlsruhe, Germany
21.05.- 23.05.2019	LABVOLUTION - World of Labs. From Research to Application. From Life Sciences to Chemical IndustryHanover, Germany
21.05.- 23.05.2019	MedtecLIVE - Connecting the medical technology supply chainNuremberg, Germany
05.06.-	med.Logistica - International Congress and Exhibition for Logistics

06.06.2019	and Process Management in HospitalsLeipzig, Germany
14.09.- 15.09.2019	HERBSTGEFLÜSTER - Lifestyle.Hobby.Genuss mit MAGDEBURGER GESUNDHEITSTAGEMagdeburg, Germany
18.09.- 19.09.2019	MEDCARE - Congress with exhibition for patient careLeipzig, Germany
18.09.- 21.09.2019	REHACARE International - International Trade Fair and Congress - Self-determined livingDusseldorf, Germany
24.09.- 27.09.2019	CMS - Cleaning. Management. Services. - International Trade Fair and CongressBerlin, Germany
26.10.- 27.10.2019	VeggieWorld Düsseldorf - Die Messe für den veganen LebensstilDüsseldorf, Germany
05.11.- 08.11.2019	A + A - Safety, Security and Health at Work - International Trade Fair with CongressDusseldorf, Germany
05.11.- 07.11.2019	CphI Worldwide Frankfurt Germany
18.11.- 21.11.2019	MEDICA - World Forum for Medicine - International Trade Fair with Congress with COMPAMED - International Trade Fair High tech solutions for Medical TechnologiesDusseldorf, Germany
19.11.- 20.11.2019	Cleanzone - the cleanroom eventFrankfurt on the Main, Germany
22.11.- 24.11.2019	veggie & frei von / Stuttgarter Messeherbst - Leitmesse für Genuss & GesundheitStuttgart, Germany

## **Overview of some significant German Pharma Companies**

### **Merck Group**

**Merck KGaA** is a German multinational pharmaceutical, chemical and life sciences a leading science and technology company with its headquarters in Darmstadt,Germany. Merck is one of the global leaders in **healthcare, life science and performance materials**. Founded in 1668, Merck is the world's oldest family owned pharmaceutical and chemical company. Merck has its presence in 66 countries employing around 52,000 employees. Merck generated a sales of € 15.3 billion in the last financial year. **Merck has its presence in India since 1967. In the year 2017, Merck generated an overall sales of € 347.2 Million in India across its three different business sectors.** Merck currently employs around 4000 people in different units India. Merck, which has its presence in India for over 50 years, has Production sites in Goa, Bangalore and Maharashtra. In February this year, Merck announced an investment in India with a new Life Science Manufacturing and Distribution Center in Patalganga Industrial Area near Mumbai. The project is a planned investment of €16.6 Million and is expected to be completed in 2019.

### **Frankfurter Innovationszentrum Biotechnologie - FIZ**

The Frankfurt Biotechnology Innovation Centre (Frankfurter Innovationszentrum Biotechnologie - **FIZ**), with its headquarters in Riedberg, Germany is a rather small-sized industry centre that offers infrastructure office and laboratory space for companies in the field of life sciences. The main objective of the company is to support the development of the biotechnology economy in the Rhine Main Region. FIZ provides a working environment, where its tenants, most of which are SME's or start-ups, can exploit synergies. FIZ mainly invites companies with a R&D focus on inflammatory diseases, diseases of the central nervous system, and proteomics. Currently, sixteen companies are tenants at FIZ and provide around 700 jobs. Apart from this, FIZ does offer consulting services and in this regard amongst others, assists, foreign governments in setting up similar facilities. The FIZ GmbH founded in 2002 operates in a public private partnership and the stakeholders are the state of Hesse, the city of Frankfurt am Main and the Chamber of Industry and Commerce of Frankfurt am Main.

FIZ has an initiative called Data Airport for Health which is an initiative by FIZ to create a high tech infrastructure for life sciences data inflow processing and outflow which would help in research globally. This would also provide a platform for a new digital business model which could also lead to progress in the life science research. The UNECE( United Nations Economic Commission for Europe) had recently recognized the expertise and capabilities of FIZ in Germany.FIZ has several public private partnership programmes in the field of Life Sciences which it facilitates. FIZ constantly collaborates with research centers in emerging markets.

### **Human Diagnostic Tools**

Human Diagnostic Tools, headquartered in Wiesbaden, was founded in 1972. It is a Germany-based privately owned company which develops, manufactures and distributes a wide range of In-Vitro Diagnostics and laboratory equipment. The company produces more than 400 products which covers different areas of modern laboratory including Autoimmune and Molecular Diagnostics. With its strong network of partners in 160 countries and with six regional offices around the globe, HUMAN maintains probably the broadest distribution and service network, especially in developing and emerging countries. The company has been helping to improve health care services in many parts of the world. Majority of the high quality products are developed in Germany. Human has distribution in India since the early 90's. Diagnostic products manufactured by Human especially in Clinical chemistry, Hematology, Immunology and Auto Immune Diagnostics has its product presence in more than 100,000 labs all over India.

### **Fresenius SE & Co. KgaA**

Fresenius SE & Co. KgaA, is headquartered in Bad Homburg Fresenius Medical Care is a global leading provider of products and services for people with chronic kidney failure. Fresenius is a multinational company with presence in 150 countries and employs around 114,000 people globally. The company's annual revenue in the Financial year 2017 was 17.8 billion Euro. The Fresenius Group is made up of four divisions:

- **Fresenius Medical Care**, a publicly traded company focusing on patients with chronic kidney failure

- **Fresenius Helios**, operator of hospitals within Germany
- **Fresenius Kabi**, a supplier of essential drugs, clinical nutrition products, medical devices
- **Fresenius Vamed**, planner, developer and manager of healthcare facilities.

**Fresenius Kabi segment in India was established in 1995 as part of a joint venture with Mafatlal Industries. Fresenius Kabi is a leading producer of Life saving medicines and Technologies in the Indian Market.** This division of Fresenius produces a range of diverse liquid products which include Infusion therapies and IV generic drugs, amino acids, colloids, enteral nutrition and oncology drugs in India. In addition clinical nutrition and medical devices are also produced by Fresenius Kabi in India. Fresenius Kabi has its main office in Pune and two production sites in Ranjangon, Maharashtra and in Goa and currently employees 1500 people. Of the total profit generated by Fresenius in 2017, the Asia pacific region contributed to 9%. Fresenius Kabi alone generated a profit of around 100 Million Euros in India.

### **Stada Pharmaceuticals AG**

Stada Pharmaceuticals AG, headquartered in Bad Vilbel. STADA Pharmaceuticals AG is a publicly traded, international company with a focus on the health care market. The 124 year old company has a wide global network. STADA focuses on a multi-pillar strategy of generics and branded OTC (Over The Counter) products with an increasingly international market orientation. Worldwide, STADA is represented by more than 50 sales companies in more than 30 countries. Stada's affiliates have retained their names globally and are therefore less known under the group name Stada. Some of Stada's prominent affiliates are ALIUD Pharma GmbH in Germany and Centrafarm Services BV in Netherlands. Stada markets a number of branded products such as Grippostad and Ladival which are among the best-selling in their product category in Germany. In financial year 2017, STADA achieved adjusted Group sales of Euro 2,255.3 million, adjusted earnings before interest, taxes, depreciation and amortization (EBITDA) of Euro 433.9 million and adjusted net income of Euro 195.6 million. As of December 31, 2017, STADA employed 10,176 people worldwide. The Market presence of Stada is significantly less in India. However Stada sources API(Active Pharmaceutical Ingredients) from India. Stada has production facilities in different parts of the globe. In

the Asian region the major production unit is in Vietnam. The company is looking forward to expanding its businesses in the emerging markets. Stada considers India as a investment destination and will explore the possibilities of investing in India.

### **Biotest AG**

Biotest AG, is headquartered in Dreieich . Biotest AG is a specialist for plasma products and one of the largest manufacturers worldwide. Biotest is a global company with representation in around 80 countries. The production of plasma products is carried out using natural blood plasma collected at the company's own 28 donation centers. The company's annual revenue in the Financial year 2017 was 378.1 million Euro. The company's most recent investment is "Biotest Next Level" which would double the existing production capacity. Plasma derived products are used for treatment of patients with life threatening and chronic diseases. Medicinal products derived from human plasma are used for hematology, Clinical Immunology and in Intensive Care Medicine. Biotest is a world leader in the area of plasma proteins as well as in the field of monoclonal antibodies. Biotest has its distributing network in India through Paviour Pharmaceuticals pvt Ltd. Biotest has products in the fields of hematology, Clinical Immunology and in Intensive Care Medicine. In India biotest currently has sales for Intratect and Hepatect in the field of Clinical Immunology and Pentaglobin and Human Albumin in the field of Intensive Care Medicine. The products which undergo an initial set of inspection in Paul Ehrlich Institute of Food and Drug Administration at Germany are later tested at National Institute of Biologicals in India. The company plans to launch Fovepta in India, which is a drug administered to mothers to curb mother-to-child transmission of Hepatitis B Virus. A new production unit called "Biotest Next Level" was is being built at the headquarters in Dreieich.

## **German Pharmaceutical Associations**

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