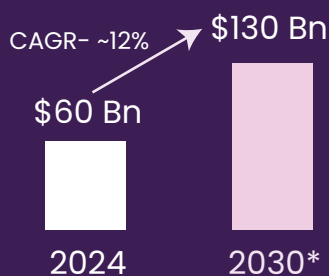


Pharmaceuticals & Biotechnology

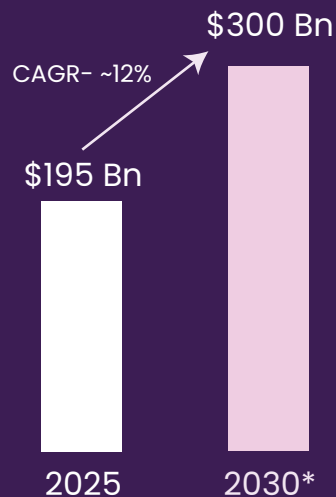


Sector Overview

Indian Pharmaceuticals
Market Size



Indian Bioeconomy
Market Size



Note- Bioeconomy includes BioIndustrial (47.2%) + BioPharma (35.2%) + BioIT (9.4%) + BioAgri (8.1%)

India at a Glance



4% Share in the Global Pharmaceutical Economy.



3rd Largest Destination for Pharmaceutical Production by Volume.



12th Largest Destination for Biotechnology Market Globally.



Highest Number of USFDA Plants Outside The USA.



60% Exports to Highly Regulated Markets like North America & Europe.

Growth Drivers

— Trade Opportunity

Trade harmonization opening access to UK, EU, ASEAN & more; India positioned to scale exports from >\$31 Bn today to ~\$350 Bn (2047).

— Technology & Digital Edge

Rapid adoption of Industry 4.0 and GenAI across manufacturing, R&D, and regulatory functions, cut costs by ~90%, boost manufacturing efficiency 40–80%.

— Global Supply Chain Diversification

As companies reduce overdependence on single markets, India's strategic partnerships and reputation for trusted quality position it to emerge as a key player in the global value chain.

— Capital Deepening & Biotech Ecosystem

Healthcare's share of PE/VC inflows jumped 3x (6% in 2021 > 17% in H1 2024) — fastest across sunrise sectors.

Government Incentives and Schemes



Production Linked Incentive Pharmaceuticals Schemes

Financial Outlay
\$ 1,667 Mn

Key Support: Incentivises local manufacturing of high-value pharmaceuticals, biopharmaceuticals and complex generics.



Production Linked Incentive Bulk Drugs Schemes

Financial Outlay
\$ 771 Mn

Key Support: Strengthens local production of APIs, key starting materials (KSMs) and drug intermediates.



Production Linked Incentive Medical Devices Schemes

Financial Outlay
\$ 380 Mn

Key Support: Promotes local manufacturing of high-value medical devices.



Bulk Drug Parks Schemes

Financial Outlay
\$ 333 Mn

Key Support: Common infrastructure across three approved parks in Himachal Pradesh, Gujarat and Andhra Pradesh.



Medical Devices Parks Schemes

Financial Outlay
\$ 55 Mn

Key Support: Shared manufacturing, testing and common infrastructure facilities.

Government Incentives and Schemes



RPTUAS Scheme

Financial Outlay
\$ 33 Mn

Key Support: Supports pharmaceutical units in upgrading to Revised Schedule M and WHO-GMP standards.



PRIP – Pharma & MedTech R&D Scheme

Financial Outlay
\$ 500 Mn

Key Support: Supports R&D, innovation and industry-academia collaboration.



Bio-RIDE Scheme

Financial Outlay
\$ 1,000 Mn

Key Support: Promotes biotechnology R&D, entrepreneurship and biomanufacturing.



RDI Scheme

Financial Outlay
\$ 11 Bn

Key Support: Long-term financing for private-sector R&D and strategic innovation.



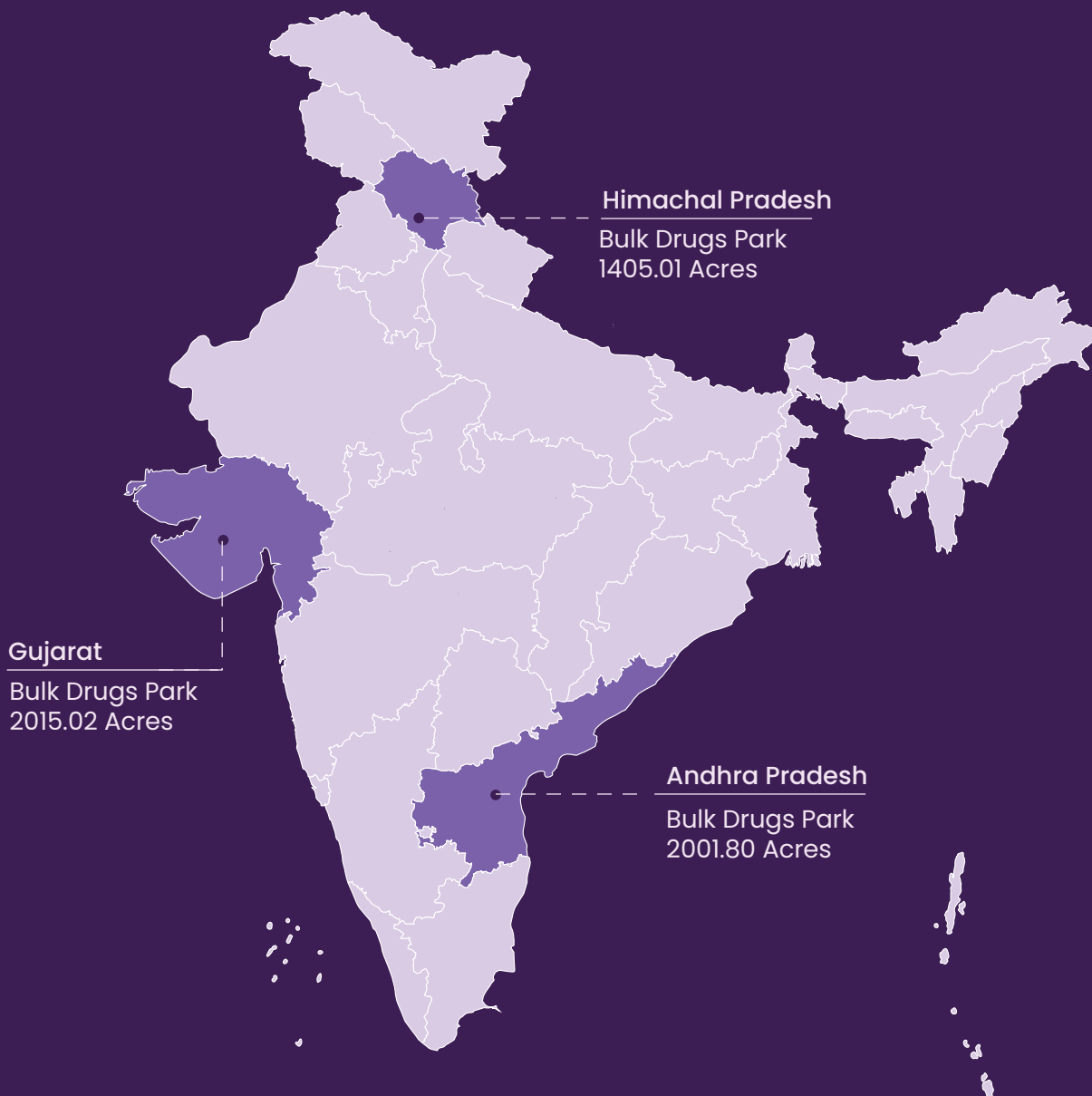
BioE3 Policy

Key Support: Promotes high-performance biomanufacturing, Bio-AI hubs, biofoundries and sustainable biomanufacturing.



Infrastructure

Plug n Play Infra: Bulk Drugs Parks in India



Common Infrastructure Facilities – Bulk Drug Park: Common Effluent Treatment Plant (CETP) & Sewage Treatment Plant (STP), Water Supply & Distribution, Internal Roads & Drainage, Power & Steam, Effluent Pipeline & Marine Discharge, Solvent Recovery & Treatment, Storage and Disposal Facility (TSDF), Rack System, Boundary Wall & Utilities.

India's Edge: Innovate, Trial, Manufacture at Scale

Capabilities reflect India's rapidly expanding drug development ecosystem

60%

Global vaccines
are produced in India.

18%

Rise in Phase 2 and
Phase 3 Clinical Trials
in India since 2018.

20%

Global Biosimilars
Developed in India.

5

Approved biosimilars in
the US were developed by
Indian companies.

6%

Share In Global Fermentation
Capacities (~1 MnL).

14

Biosimilars in pipeline in
the US are being developed
by Indian companies.



Contract Research

\$15.8 Bn

Indian bio-services market

85%

Revenue from exports

15%

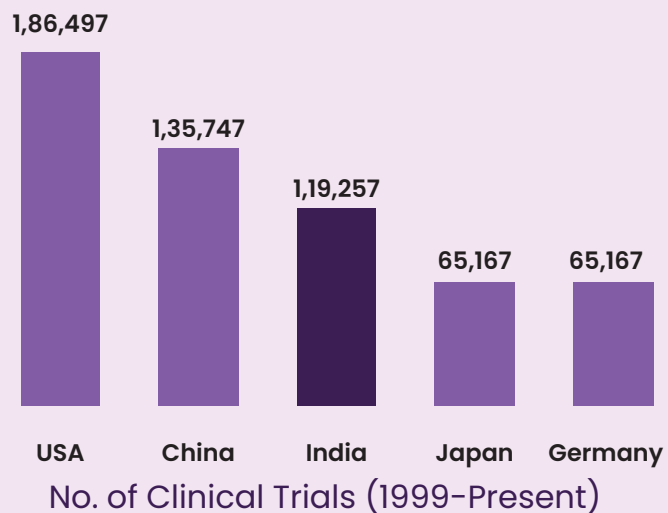
Estimated CAGR by 2030



Clinical Development

3rd

Largest destination for clinical trials, with ~8% of global CTs in India



Manufacturing

3rd

Largest destination for pharmaceutical production by volume

>\$31 Bn

Pharmaceutical exports

750+

Highest number of USFDA-approved manufacturing plants outside the US



India is Home to Multiple Global Pharma Companies

Ensuring uninterrupted access to affordable medicines through 118 biopharma clusters

Northern Zone (R&D + Manufacturing)

Punjab-Haryana Cluster, NCR Biotech Cluster, State Bulk Drug Park in UP



Agilent

Cipla

J&J



ThermoFisher
SCIENTIFIC

teva

Southern Zone (R&D + GCCs + Manufacturing)

Bulk Drug Park in Andhra Pradesh,
Genome Valley in Telangana, Innovation Hubs in Karnataka

Lilly



Bristol Myers Squibb

MERCK



Biocon

AMGEN

Western Zone (Manufacturing)

Bulk Drugs Park in Gujarat, Manufacturing and R&D Cluster in Maharashtra, Rajasthan Cluster for APIs



Central Zone (Manufacturing)

100+ local and global Pharma manufacturers in Madhya Pradesh



Eastern Zone (Manufacturing)

Sikkim-Kolkata Zone, Upcoming Bulk Drug Park in Chhattisgarh, Biotech Park in Odisha



Investment Opportunity

India offers an unparalleled “Triple Advantage” — unmatched scale, world-class talent, and lowest global cost base; to co-create the next frontier of pharma innovation and secure resilient supply chains for the future.



Bulk Drugs & Generics Manufacturing

India supplies 20% of global generics exports, 40% lower costs vs. US/EU; backed by PLI scheme & 3 Bulk Drug Parks.



Novel Drug Discovery & Development

India leads in bulk drugs, generics, biosimilars, and vaccines, and is now leveraging GenAI to cut early-stage drug development costs by 25–50%.



Clinical Trials Hub

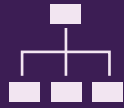
3rd Largest destination 35–60% cheaper; wages 70–80% lower vs. US Large patient pool; global players (BMS, Axis Clinicals, Lambda) already present.



Biopharmaceutical Raw Materials*

India's biopharma market to hit \$112.2 Bn by 2030 Indigenisation of inputs to cut costs & boost competitiveness.

Investment Opportunity



Global Capability Centres (GCCs)

100+ pharma GCCs today, 420,000+ skilled professionals driving AI, ML, and data-led efficiencies. Global players - Novartis, Lilly, Novo Nordisk.



Industry-Academia Linkages

2M+ STEM graduates every year
Strong research - industry ecosystem accelerates R&D
Ensures steady pipeline of industry-ready talent
Key institutes- NIPERs, IITs.



Contract Research & Manufacturing (CRAMS)

~85% BioServices are exported. Indian CROs, CMOs, and CDMOs serve as trusted partners to global pharma and biotech companies. Global Players- SII, Syngene, Laurus Labs.

About Invest India

Invest India is the National Investment Promotion and Facilitation Agency of the Government of India, set up in 2009 as a not-for-profit company under the Department for Promotion of Industry and Internal Trade (DPIIT), Ministry of Commerce and Industry.

Supported by a unique partnership between the central and state governments and industry associations, Invest India serves as the first point of contact for global and domestic investors. It provides comprehensive, end-to-end support across all stages of the investment lifecycle—ranging from pre-investment advisory and facilitation to aftercare and expansion support—with a strong emphasis on enabling manufacturing through the Make in India initiative.

Invest India plays a vital role in connecting investors, industry, and government to ensure the successful execution of investment projects. The agency focuses on promoting investments in high-impact sectors such as Electronics & Semiconductors, Renewable Energy, Electric Vehicles, Capital Goods, Textiles, Food & Agriculture, Pharmaceuticals, Chemicals & Critical Minerals, and Infrastructure. With a commitment to innovation, sustainability, and job creation, Invest India continues to drive India's transformation into a leading global investment destination.

Invest India Services



For more details:



investindia.gov.in



+91 11 23072328



contact@investindia.org.in



Jodhpur Officer Hostel, C-Hexagon, Pandara Park,
India Gate, New Delhi-110003

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