



Brief Report

India Pavilion at CPhI Worldwide

09-11 Oct 2018, IFEMA, Madrid, Spain

ORGANISED UNDER MAI SCHEME

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CPHl WORLDWIDE 2018

EVENT AT GLANCE:

“CPhI Worldwide: Uniting the Pharmaceutical Industry”, the world’s largest pharmaceutical exhibition hosted in Madrid, Spain houses six individual pharma events covering all industry sectors - from ingredients and FDF to machinery, packaging, outsourcing and biopharmaceuticals. Uniting over 45,000 pharma professionals from leading companies around the world and more than 2,500 international exhibitors in over 20 specialist zones, it is the place to network and source cost-effective pharma solutions from all over the world in just three days under one roof.

A one stop trade platform gathering professionals of API, FDF, CRO/CMO, biopharmaceuticals, pharma machinery, packaging equipment & material, laboratory equipment, environmental protection and clean, pharma logistics, food ingredients & machinery, herbal extracts, nutraceutical & health product sectors.

Exhibitor & Visitors Participation:

- No. of Exhibitors: Over 2,500 Exhibitors from 50 countries
- No. of Visitors: Over 45,000 Pharma and allied industry professionals from 165+ countries
- Top Ten Exhibitors by Countries: China, India, Germany, Italy, USA, UK France, Switzerland, Spain and Japan.

Co-located events: ICSE, P-MEC, InnoPack and FDF

The event was attended by CEOs and Vice Presidents of large and medium scale pharmaceutical companies, the decision makers making the show vibrant and commercially viable for companies participating and visiting CPhI Worldwide at Europe.

About 22 countries have set up their Pavilions at the CPhI Worldwide represented by the respective Trade Associations and Government bodies

PHARMEXCIL PARTICIPATION IN CPhI WORLDWIDE 2018:

Council with the support of Ministry of Commerce & Industry organized “India pavilion” at CPhI Worldwide for the seventh consecutive year. Based on the suggestions from member companies, Council organized India Pavilion at Hall 7 focused to Integrated Pharma (API and Formulations) and Hall 8 focused to API.

- 55 no.of Indian Pharma companies participated through Pharmexcil at CPhI Worldwide 2018.
- Hall 7: 28 companies participated in Integrated Pharma section
- Hall 8: 27 companies participated in API section

List of companies participated in India pavilion attached as Annexure I

The event is led by Mr.Ravi Udaya Bhaskar, Director General and coordinated by Mr.Murali Krishna, Joint Director with assistance from Ms.Lakshmi Prasanna.Ch, Senior Regulatory Affairs Officer, Pharmexcil.

Brochures:

We have printed brochures containing information about Indian Pharma industry and its Accreditations, product profile and contact details of the participants and are distributed to the visitors and local pharma associations.

Digital Pavilion Directory:

Council for the first time introduced Digital Pavilion Directory in the form of QR Code for the easy access of contact details and product profile of the pavilion participants and distributed to the visitors.



INAUGURATION OF INDIA PAVILION

India Pavilion at CPhI Worldwide was inaugurated by the Chief Guest Mr. Siddhartha Chattopadhyay, Cd'A a.i., First Secretary (Consular), Embassy of India in Madrid, Spain on 09th October 2018. The inaugural program was attended by Mr. Saravanan Balasubramanian, Second Secretary, Indian Embassy, Dr.Dinesh Dua, Chairman, Pharmexcil & CEO, Nectar Life sciences, Mr.Ramesh Babu COA member & CEO, SMS Pharmaceuticals Mr.DVS Reddy, COA member & Director, Nosch laboratories, Mr.Devang B Shah, COA Member & Director, Aadvighnesh Chem Pvt Ltd, Mr.Ravi Udaya Bhaskar, Director General of Pharmexcil, Mr. Jayanth Tagore, Director, Synthokem Labs Pvt Ltd, Mr.Satish Wagh, Director, Supriya Life sciences, Mr.Sandeep, Director, Uquifa, Mr.Yogesh Mudras, Managing Director, UBM India and Mr.Rahul Deshpande, Group Director, UBM India and other Industry representatives

The team lead by Mr.Siddhartha Chattopadhyay, , Cd'A a.i., First Secretary (Consular), Embassy of India, Dr.Dinesh Dua, Chairman, Pharmexcil, Mr.Ravi Udaya Bhaskar, Director General, Pharmexcil interacted with companies present in India Pavilion at Hal 8.

Pharmexcil with a view to keep up the image of Indian Pharma Industry at International level, has made all possible efforts for presenting an elegant India Pavilion. The design and presentation of India Pavilion at CPhI Worldwide was appreciated by the Industry.



Pharma Summit: “Doing Business in Evolving Dynamics: India-EU and UK”

Pharmexcil with the support of Ministry of Commerce & Industry, Government of India and Department for International Trade, UK, has organized Pharma Summit on “Doing Business in Evolving Dynamics: India-EU and UK” on 10th October 2018 at Pharma Forum Theatre.

The interesting aspect of the engagement this year included the special focus on the contribution of nations of EU and UK towards pharma generics (API & Drug Product). Prominent Healthcare & Pharmaceutical personalities from across the globe and Drug Regulators (Europe & India) were participated in the summit.

Mr.Uday Bhaskar, Director General, Pharmexcil welcomed the gathering and presented global perspective of Indian Pharma industry. He said Europe is one of the very important destination for India pharma exports and will continue to work with FDA and Trade Associations in EU for long term trade and bilateral relationships.

Dr.Dinesh Dua, Chairman, Pharmexcil has given key note address and emphasized the strengths of India Pharma as the world hub for generics industry and India’s contribution in global healthcare with specific references to the cost savings being made possible through generics.

Mr. Siddhartha Chattopadhyay, Cd'A a.i., First Secretary (Consular), Embassy of India in Madrid, Spain has given special address and invited European Pharma community to associate with India Pharma for safe and affordable healthcare.



Presentation on Synergy between Regulatory frameworks:

Mr. Richard Andrews, Inspectorate Operations Manager, UK-MHRA has briefed about the thought process of UK-MHRA with reference to BREXIT scheduled to implement from Mar 29, 2019. He emphasized regulatory requirements of marketing a medicines in the UK and detailed about the Negotiation of the withdrawal Agreement, Implementation period and “No Deal” Brexit preparedness. He highlighted that the UK government has published “Technical Notices” (TN) to industry, outlining pragmatic approach to medicines supply continuity: How medicines, medical devices and clinical trials would be regulated, on submission of regulatory information and Batch testing and certification of medicines.

Emerging Paradigms of Collaborations: India- EU & UK

Mr.Sanjeev Dani, Chief Operating Officer & Head Formulations, Aurobindo Pharma Ltd has given presentation on “EUROPE GENERICS: TRENDS AND OPPORTUNITIES”. He explained about the Market growth rate: present and future with special focus on Generic penetration, Complexity of doing business in Europe, Market approach for success and challenges and opportunities in Europe market. It was expressed that acceptability of biosimilars in Europe is improving significantly.



Aurelio Arias, Senior Consultant, European Thought Leadership, IQVIA has given presentation on Global and European trends: Implications for Indian Pharma". As per the IQVIA market analysis report:

- China and India will represent nearly half of all global volume by 2022 and India will be on par with China but about a sixth of its value.
- With respect to generics, US and China largest Generic markets, with EU5 countries close behind.
- Five therapy areas (Antibacterial, Pain, Antihypertensive, Other CV & mental health) contribute to 32% of global small molecule generic value.
- UK and Italy among top penetrated markets in EU5 countries.
- Tremendous opportunities in EU Oncology generics.

Ms. Fiona Jefferson, International Trade & Investment Specialist, Scottish Development International (SDI), London and Dr. Charles Winiarski, Business Development Life Sciences, MIDAS (Manchester's Inward Investment Agency) has elaborated the business and investment opportunities in Scotland and Manchester respectively.

The presentations given by the above speakers are enclosed.

UK : Connect, Collaborate, Innovate: An interactive session with 10 UK pharma companies was organized to explore potential partnership opportunities with India.

Market Report

The pharmaceutical sector is having a challenging 2018. Governments are seeking to control growth in healthcare spending and will disproportionately target expenditure on medicines with mechanisms such as Price controls. While it may push the usage of Generics higher in Developed markets Like Europe and USA, the Pricing of generics is likely to come under fire. A few snags in European Medicine agencies Regulatory affairs, due to UK leaving the union.

The relocation of the EMA will impact the entire European pharmaceutical market, potentially slowing down the drug approvals process, leading to approval delays and subsequently hurting company revenue streams.(As they may have to pay for UK authorisations separately which may be an additional burden).

Pharma Market Growth Potential:

India (7.16), USA (7.04) and China (6.81) are the countries having the fastest growth potential in the current year. Their high growth domestic markets and expanding manufacturing exports are the key drivers. The U.S., which has seen a resurgence in the past year, was understandably strong, while Germany was seen as Europe's key growth market.

It was notably well clear of France, Spain, the U.K., and Italy. The biggest movers in terms of growth potential in comparison to last year were the United Kingdom, boosting its score by 12.72%, followed by the Italy (+10.94%), USA (+10.63%) and Japan (+9.56%). The big surprise was views of China's growth potential decreasing by 5.34%. This may reflect ongoing trade issues with the US, which is, of course, by far the world's biggest pharma market.

Likely EU wide Purchase Price agreements:

The potential for an EU-wide medicine purchasing framework would have considerable consequences for both multinational drug makers and a number of EU members. This agreement would therefore enable EU countries to enforce huge discounts on medicine prices or enter into complex agreements and rebate negotiations, significantly reducing drug makers' profit margins and slashing revenues. This would have a snowball effect on Generics pricing.

EU Generic Market:

EU with its ageing population and with sagging medical bills is facing a difficult situation to contain its health care expenditure. The ageing population of EU requires more of Medicines of Life style (chronic conditions) diseases like Hypertension, CNS (Central Nervous systems), and Diabetes etc. Medicines for these conditions are of management (patients have to be on medicines for the rest of their lives) type and not curative. India companies' expertise in making these products are world acclaimed and combined with very affordable price is of first choice.

Regulatory:

Market regulation is based on EU Directives 65/65/EEC, 75/318/EEC and 75/319/EEC. EU in General is supportive of the industry (mostly to EU companies) and is now actively considering some of the major amendments suggested by EGA(European Generic & biosimilar medicines Association).

Currently an application for a generic market authorisation a reference product for clinical trials has to be sourced from EU only. Similarly to conduct Bioequivalence Tests also the reference product has to source from EU.

At present, generic products can use the EU's centralized procedure, but only if the reference drug also took that route.

EGA has made recommendations to amend the above suitably to make registrations a bit easier.

EU is also a group member of International Generic Drug Regulators Pilot (IGDRP) which commenced in July 2014 (Constitutes EU members and Australia, Canada, Taiwan & Switzerland). This group intends to share their assessments of applications of companies seeking market authorisations.

FEEDBACK FROM MEMBER COMPANIES

Council participated in CPhI Worldwide for the Seventh consecutive year and organised India Pavilion by taking space of 624 Sq.mtrs with participation of 55 member companies.

The member companies expressed their satisfaction with the arrangements made by Pharmexcil and are impressed with the India pavilion design & branding, stall construction, Digital Pavilion Directory. Most of the member companies expressed their willingness to continue their participation in CPhI worldwide 2019 as well.

Member companies had good business meetings during these three days and some of them could sign the business deals.

Member companies have requested Pharmexcil to book the space for the year 2019.



Annexure-I

Member companies participated in India Pavilion

1	Activz Lifesciences (I) Pvt Ltd	29	Medilink Pharmachem
2	Allianz Biosciences Pvt. Ltd	30	Metina Pharmconsulting Pvt. Ltd
3	Amsal Chem Pvt.Ltd	31	Murli Krishna Pharma Pvt Ltd
4	ASG Biochem Pvt. Ltd	32	NB Entrepreneurs
5	Asoj Soft Caps (P) Ltd	33	Panvo Organics Pvt Ltd
6	Aspen Biopharma Labs Pvt Ltd	34	Premier Intermediates Pvt Ltd
7	Brundavan Laboratories Pvt Ltd	35	Premium Serums & Vaccines Pvt Ltd
8	Clarion Organics Ltd	36	Pure Chem Private Limited
9	Cornileus Pharmaceuticals Pvt Ltd	37	Quad Life Sciences Private Limited
10	Disto Pharmaceuticals Pvt Ltd	38	Rajasthan Antibiotics Ltd
11	Flax Laboratories	39	Rasino Herbs Pvt. Ltd
12	Fortcaps Healthcare Ltd	40	Reine Chemicals Pvt Ltd
13	Fourrts(India)Laboratories Pvt Ltd	41	Riocare India Pvt Ltd
14	Global Pharma Healthcare Pvt Ltd	42	S G Pharma Pvt Ltd
15	Glukem Biocare Pvt Ltd	43	S.A. Herbal Bioactives Llp
16	Hemmo Pharmaceuticals Pvt Ltd	44	Sarex Overseas
17	Hexagon Nutrition Pvt. Ltd	45	Shashi Phytochemical Industries
18	Indo Amines Ltd	46	Shreeji Pharma International
19	Indo Herbal Extractions	47	Siflon Drugs/
20	Infinium Pharmachem Pvt Ltd	48	SM Herbals Pvt Ltd
21	J P N Pharma Pvt. Ltd	49	SNA Healthcare
22	K.Patel Phyto Extractions Pvt. Ltd	50	Spansules Pharmatech Pvt Ltd
25	Kimia Biosciences Ltd	51	Suparna Chemicals Ltd
23	Kores (India) Ltd	52	Surya Organics & Chemicals
24	Lake Chemicals Pvt Ltd	53	Synthokem Labs Pvt Ltd
26	Lee Pharma Ltd	54	Verve Human Care Laboratories
27	Macsen Laboratories	55	VPL Chemicals Pvt. Ltd
28	Mahidhara Chemicals Pvt. Ltd		