

HYDERABAD – Vibrant and Progressive

Hyderabad, joint capital of Telangana & Andhra Pradesh, is the sixth largest urban agglomeration of India. The City enjoys the advantage of its location and connects to all major cities in India through rail, road and air. The Hyderabad International Airport (Rajiv Gandhi International Airport) provides connectivity to major international destinations.

Hyderabad is ranked 3rd amongst top 20 cities in the world to become 'Global Mega Hub' by 2020. (Source: Doing Business 2011-report published by the World Bank Group). This is the only Indian city which figures in the top 10 large cities in the world considered as the 'Most Sustainable Cities by 2020'

(Source: The Ethisphere Institute, USA).

The economic growth drivers of the city are knowledge based industries such as Biotechnology, Pharmaceuticals and IT, ITES. The city houses several multinational life sciences giants like United States Pharmacopeia (USP), DuPont, Albany Molecular Research Inc. (AMRI), Nektar Therapeutics, Sanofi Aventis, Aptuit-Laurus etc. as well as home grown companies such as Dr Reddy's, Aurobindo Pharma, Bharat Biotech etc.

Several world renowned academic and research institutes and universities are based in Hyderabad, thus creating a vast pool of talent. It has a large number of super speciality hospitals well equipped for clinical trials of international standards, making it the 'Health Capital of India'.

Hyderabad has a globally competitive research ecosystem supported by integrated infrastructure facilities. The city houses several Techno- townships, Hardware Parks, Software Parks, Apparel Export Parks, Special Economic Zones and Industrial Promotion Parks.

430 year old Hyderabad city is home to many historical sites, including the UNESCO Asia Pacific Heritage site of Chowmahalla Palace, the Charminar, Golkonda Fort, Salarjung Museum, Falaknuma Palace, etc. The city is a regular tourist hotspot and carries many places of interest.

Hyderabad's unique flavour gives the city its distinct branding that perhaps none of the other Indian metros can boast of. Hyderabad is a mini-India, a global melting pot. It puts anyone who comes here at ease. Its spirit of entrepreneurship, the easy pace of life, along with the other advantages like its excellent physical and social infrastructure, its knowledgeable people and technology edge imparts it a unique flavour.

Hyderabad – The Pharma Hub of India

Hyderabad has a dominant position in Pharma Sector, it ranks first in manufacturing of bulk drugs and third in formulations in the country. It accounts for 40 per cent of the total Indian bulk drug production and 50 per cent of the bulk drug exports and is considered as the 'Bulk Drug Capital of India'. In value terms, the industry is worth US\$ 1.6 billion and exports accounting to over US\$ 500 million. The Pharma industry and exports from here are expected to grow at 20 per cent annually.

The Telangana and Andhra Pradesh has over 2500 Pharma companies and is home to few of the top pharma companies Viz. Dr. Reddy's Laboratories, Aurobindo pharmaceuticals, Mylan, Novartis, Nicholas Piramal, Divi Labs, NATCO Pharma, Gland Pharmaceuticals, etc.

There are more than 200 'Active Pharmaceutical Ingredients (API)' units in the state, which are poised to grow at a rate of 10 to 15 per cent annually in the coming days.

Hyderabad is also referred to as the 'Vaccine Hub of India'. The city is home to leading vaccine producers such as Bharat Biotech, Biological E, Shantha Biotech, Indian Immunologicals, Globion Bio among others.

The Clinical Trial sector in Hyderabad has also witnessed a steep rise, with leading clinical trial companies such as GVK Biosciences, Sipra, Vimta Labs and Quintiles among others.

Evolution & Growth of Pharma Industry in Hyderabad

Hyderabad has grown into a pharma hub for bulk drugs basically for two reasons, firstly due to establishment of Indian Drugs and Pharmaceuticals Ltd. (IDPL) and secondly due to the enterprising nature of its people and availability of adequate talent pool in the state.

Indian Drugs and Pharmaceuticals Ltd. (IDPL) was set up in the year 1961 at the behest of India's first Prime Minister, Pandit Jawaharlal Nehru as India's largest public sector drug maker in the early days, to enable the country attain self sufficiency in life-saving drugs.

In 1977 the government has established an industrial estate at Jeedimetla in Hyderabad, to develop ancillary units for IDPL. This started off a growth phase of the pharma cluster here.

The proactive steps and availability of infrastructure has attracted lot of Technical talent into the industry. Large number of current MSME entrepreneurs here are technocrats who have working experience with large or medium pharma firms and Organizations. The units started in small way and rapidly graduated to the next level Dr. Reddy's Lab, Aurobindo Pharma, Natco, Divi's Lab, Matrix, Suven Pharma, Vimta Lab, Neuland Laboratories, etc. are now internationally recognized names.

Today Hyderabad has become the preferred destination for investments in pharmaceutical sector by Indian and as well as foreign multinational companies. It is also a centre for pharmaceutical healthcare education and research and reputed for innovation in these areas.

Government's role in development of Pharma Sector

The Government, having identified Pharma & Biotechnology as key growth drivers in its Vision 2020 document, has since established and nurtured the growth of 'Genome Valley', a Biopharmaceutical and Contract Research Organization Zone spread across 600 sq.kms. in and around Hyderabad, covering the suburbs - Shamirpet, Medchal, Uppal, Patancheru, Jeedimetla, Gachibowli and Keesara.

Key components of Genome Valley are

'IKP Knowledge Park' - spread over 200 acres, is a joint initiative of ICICI Bank and Government of AP. It is the first of its kind knowledge-nurturing centre for the Indian companies and a knowledge gateway for multinational companies. It has a mix of ready-to-use multi-tenanted modular wet laboratory blocks (Innovation Corridors), shared facilities and support services, as well as developed land for customised R&D facilities.

'Alexandria Knowledge Park' - spread over 300 acres, is developed in a Public Private Partnership mode. The Park has been successful in creating a vibrant cluster of life science companies - from large multinationals to start-ups. It accommodates advance research and development infrastructure in multiple formats like multi-tenanted research buildings, incubation facilities, built-to-suit blocks and industrial plots. The Park has been developed in two phases. Phase I covers approximately 145 acres and Phase II covers approximately 162 acres of land.

Some of the companies located in Genome Valley are – Novartis, Grace Davison, E.I. Dupont, Zenotech Laboratories (Daiichi), Daicel Chiral, Nektar Therapeutics, AMRI, United States Pharmacopeia (USP), Sanzyme, Lonza, Laurus Labs, Laxai Avanti, Mithros Chemicals, Sai Advantium, Vimta Labs, Symphony Pharma, Sandor Proteomics, Aizant, Alveus Pharma, etc.

Further, as part of the Genome Valley Phase -III, State Government has facilitated the establishment of industrial units in Karkapatla near Shamirpet on 600 acre land. State Government is also facilitating establishment of other SEZs viz. Lonza SEZ, R&D Campuses for Celon Labs and Indian Immunologicals.

Hyderabad Airport - key outlet for Pharma Exports

With demand for temperature-controlled transport of pharmaceutical products made in India continuing to grow, Hyderabad has emerged as the centre for business. **60% of the cargo volume shipped from Hyderabad airport consists of pharmaceutical products.**

India is one of the leading suppliers of generic drugs, particularly for HIV treatment. Rajiv Gandhi International Airport (Hyderabad Airport)'s role is unique, shipping generic drugs manufactured in Hyderabad to affected people across many countries. The United States is the most important market for India's pharmaceutical exports, Europe is the second-largest, followed by Africa and Russia.

Lufthansa and Hyderabad Airport have signed a MOU to facilitate transportation of pharmaceutical products. Domestic cargo transporting companies such as Blue Dart are also increasing their presence in Hyderabad.

Hyderabad Airport is also creating a free-trade zone and would be established on a 28-hectare plot of land that would offer duty and demurrage-free facilities to shippers.

Hub for Skilled Manpower

Hyderabad offers excellent opportunities for the growth of the pharmaceutical industry due to availability of trained and skilled manpower, thanks to the presence of number of renowned Research and Development facilities, including the Indian Institute of Chemical Technology (IICT), National Institute of Pharmaceutical Education & Research (NIPER), Indian Institute of Life Sciences (IILS), CCMB, NIN, CDFT, etc.

There are more than 350 pharmaceutical colleges under various state and central universities offering professional education in the state offering various graduate, post graduate and doctoral programs. Apart from this, there are numerous hospitals, research and diagnostic laboratories which are enabling the growth of Pharma sector in the State.

Related Industry Associations in Hyderabad

Pharmaceutical Export Promotion Council (PHARMEXCIL) - was set up by the Ministry of Commerce and Industry, Government of India in 2004 at Hyderabad for promotion of pharmaceutical exports from India. Pharmexcil takes up several external trade promotion activities by organizing trade delegations outside India, arranging buyer-seller meetings, international seminars, interactive meetings on exports related issues, make suggestions to Govt. of India on policy issues relating to pharma exports, make representations to Govt. of India and other agencies in India and abroad to get amicable solutions for the common problems of the industry, etc.

Bulk Drug Manufacturers Association (India) - was formed in 1991 with Hyderabad as its Head Quarters. BDMA is an all India body representing all the Bulk Drug Manufacturers of India. The Association works for the consolidation of gains of the industry and serves as a catalyst between the government and the industry on the various issues for the growth of the industry. Majority of BDMA members are from Hyderabad.

Federation of Asian Biotech Associations [FABA] - Headquartered in Hyderabad, FABA, is a non-profit registered society engaged in various activities related to promoting Biotechnology in 20 Asian countries including China, India, Bangladesh, Malaysia, Philippines, Russia, Kazakhstan, Pakistan, Israel, Iran, Indonesia, Nepal, Japan, South Korea, Singapore, Thailand, Sri Lanka and UAE. Besides, FABA has entered into working understandings with Non-Asian organizations like European Federation of Biotechnology, Biocat (Spain), Maryland India Business Round Table (USA), Bio Industry Park (Italy) and Association of German Biotech companies (Germany), etc.

The Federation of Andhra Pradesh Chambers of Commerce - started in 1917 as a Chamber of Commerce representing the entire old State of Hyderabad was changed to 'The Federation of Andhra Pradesh Chambers of Commerce and Industry' in 1958 after the formation of Andhra Pradesh state. Today FAPCCI represents large, medium and small scale industries. It also represents wholesale, retail and small trade organizations. It consists of public, private, joint and corporate sectors. It has about 150 affiliate Chambers and Associations at State, District, Mandal levels. FAPCCI has 3236 members on its rolls.

Key Pharma companies in Hyderabad

Profiles of pharma companies in Andhra Pradesh that have made a noteworthy mark in the domestic as well as the international markets by way of exporting bulk drugs and formulations:

Dr Reddy's Laboratories

Established in the year 1984, Dr Reddy's Laboratories (DRL) is a global pharma company. The company provides affordable and innovative medicines through three core businesses—pharmaceutical services and active ingredients, global generics and proprietary products.

Today, DRL is India's second-largest pharma company and is headquartered in Hyderabad.

Aurobindo Pharma

Aurobindo Pharma is a manufacturer of generic pharmaceuticals and APIs. Based in Hyderabad, its significant products are antibiotics, anti-retrovirals, CVS, CNS, gastroenterological and anti-allergics. Aurobindo is among India's top five pharma companies in the country. It commenced operations

in 1988-89 with single unit manufacturing semi-synthetic penicillin's (SSPs) at Pondicherry and is now a market leader.

Matrix Laboratories

Matrix Laboratories, is a public limited company manufacturing APIs and solid oral dosage forms based in Secunderabad, apart from contract research and manufacturing. Important products from the company are anti-bacterial, CNS agents, antihistamines, antiasthmatics, antivirals etc.

Divis Laboratories

Divis Laboratories established in the year 1990, is a Hyderabad-based pharma company, known for making APIs and intermediates, apart from contract manufacturing. Its activities include custom synthesis of APIs, making building blocks for peptides and nucleotides, carotenoids, chiral ligands etc.

Granules India Limited (GIL)

Granules India Limited (GIL) is a fully integrated manufacturer of pharma formulations best known for making pharma formulation intermediates (PFIs) of acetaminophen/paracetamol, aspirin, ibuprofen, metformin etc. The company also does contract manufacturing of drugs.

Headquartered in Hyderabad, the company has its expertise in manufacturing APIs since 1984 and PFIs since 1993. It has been marketing products in the US since 1987. Offering quality products, GIL has become one of the largest manufacturers of paracetamol in the world.

Natco Pharma

The Hyderabad-based Natco Pharma has four manufacturing facilities. The company makes branded and generic dosage forms, bulk actives and intermediates. It is also involved in contract research and manufacturing.

Suven Life Sciences

Suven Life Sciences provides drug discovery and development support services, as well as contract research and manufacturing services to the global life sciences industry. The company is based in Hyderabad. The various products manufactured by Suven are intermediates, advanced intermediates, APIs etc.

Bharat Biotech International

Bharat Biotech International (BBI), Hyderabad, is a multidimensional biotechnology company specialising in product-oriented research, development and manufacturing of vaccines and biotherapeutics. BBI engaged in developing next-generation vaccines and bio-therapeutics through innovative and collaborative research.

Bharat Biotech's state-of-the-art manufacturing plant is the largest of its kind in Asia-Pacific. The first bio-pharma facility in the country to be audited and approved by the Korean Food and Drugs Administration (KFDA), it sprawls over a picturesque campus at Genome Valley, Hyderabad. The facility's manufacturing, control procedures and protocols, confirm to the stringent standards laid down by international regulators such as US FDA, UK MCA and WHO.

Shantha Biotechnic

A pioneer in the field of biotech, Shantha Biotechnics is the first Indian company to develop, manufacture and market a recombinant human healthcare product in India. The company is committed to breaking new ground in modern biotech to address critical healthcare needs of the developing world.

The company was taken over by the Merieux Alliance group in November 2006. Merieux Alliance is a France based global organisation having presence in all elements of the healthcare chain: prevention, diagnostics, prognosis, treatment and clinical monitoring.

GVK Biosciences

GVK BIO is a contract research organisation (CRO) and provides contract research services to a rapidly growing base of global pharma and biotech companies. It combines science, innovation and people to help clients address their drug development challenges. GVK BIO is a part of the \$1 billion GVK group.

Ocimum Biosolutions

Ocimum Biosolutions is an integrated global genomic services company with operations in Hyderabad and Gaithersburg, Maryland, US. The company provide comprehensive (research level and GLP-compliant) genomic services, reference databases, and LIMS solutions. Ocimum has been chosen as a global preferred outsourcing provider for more than 75 percent of top 25 pharma and biotech companies plus leading research institutes.

Transgene Biotek

Transgene Biotek was probably the first true biotech company in India. It is listed on the Indian Stock Exchanges and is involved in the development of several cutting edge technologies.

From the knowledge gained in developing recombinant vaccines successfully since 1994, and having gained considerable experience in improving the technology processes of those products, Transgene has expanded its product portfolio to other therapeutic areas such as bio-generics, oncology and New Drug Delivery Systems (NDDS) among others.

About HITEX

HITEX, Hyderabad International Trade Exhibitions Limited, constituted by Government of Andhra Pradesh under Public-Private Partnership mode with India's leading Engineering & Construction major - Larsen & Toubro Ltd., has created world class infrastructure to host international

trade shows, exhibitions, conventions and events.

HITEX is strategically located in Hyderabad, the business and technology hub of India. HITEX is spread over 50 acres of land, has – three air- conditioned Exhibition halls of area 3500 sqm each and complemented with 15,000 sqm of open display area, apart from conferencing facilities of various sizes and ancillary services including parking spaces (3000 cars), organiser's offices, media rooms, VIP lounges, etc.

A 287-room Novotel business Hotel and a 3000 pax Hyderabad International Convention Centre (HICC) are located in the HITEX campus, offering convenience and scale to organisers planning large events in India.

HITEX - the premier trade destination, continues to converge and connect.

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