

Contents

Sections

Key highlights	1
Segmental definition	2
Structure	4
- Industry structure	4
- Market size and structure	5
- Growth drivers of the industry	6
- Revenue model	8
- Cost structure	11
- Industry structure	11
- Porter's five competitive forces model	12
- Regulatory environment	13
- Drug development process	16
Conduct	19
- Player Profiles	19
Performance	29
- Demand Review	29
- Demand outlook	29
- Cost and margins	30
- Financial performance	31
Investment opportunity	32
- Opportunities and risks	32
- Risks and structural weaknesses	33
- Investments and financing	33
- Mergers and acquisition	34
- Glossary	35
- Fact Sheet	35

Boxes

<u>Structure</u>	4
- Key elements of the National Biotechnology Development Strategy	16
<u>Performance</u>	29
- Indian biopharmaceutical market – Demand methodology	30

Continued...

...continued

Charts

<u>Segmental definition</u>	2
- Classification of drugs	2
<u>Structure</u>	4
- Revenue model of Biopharmaceutical industry	9
- Snapshot of global biopharmaceutical industry	14
- Timelines for approval of biopharmaceuticals in India	15
- Typical drug development process	17

Figures

<u>Structure</u>	4
- Biotechnology candidates as a per cent of total pharmaceutical candidates	7
- Comparison of R&D expenditure	7
- Overall cost break-up (2007-08)	11
- Break-up of operating cost (2007-08)	11
<u>Performance</u>	29
- Exports drive biopharma growth	29
- DuPont analysis (2007-08)	31

Tables

<u>Structure</u>	4
- Key	9
<u>Conduct</u>	19
- Snapshot of the financial profile of the players - 2007-08	19
<u>Investment opportunity</u>	32
- Leading global biotechnology companies (Figures in \$ million)	35

continued...

...continued

Company report

Business profile

- Business evolution
- Business model
- Business trends
- Peer comparison

Business & financial assessment

- Business environment
 - Key competitiveness factors
 - Revenue and margin drivers
 - Financial statements analysis
 - Business and financial outcomes
 - Cash flow statement
 - Future strategy and plans
-