



Hanseatic India Colloquium

Hamburg 14th Nov 2008

Greetings from India



Namaste

Agenda

India

Piramal

Global IVD vs Indian IVD

Indian IVD Market

Future of Indian IVD Market

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India vital statistics

- India Population - 1151mn
- Economy US\$ 4.736 tn
- Middle Income Group 30% of the population
- Education 61% literacy
- Average age 26 years
- Life expectancy 67 years
- Agriculture gives 21% GDP and provides 64% employment

Delhi – Political Capital of India



India Gate

Mumbai – Financial Capital of India



.....the gateway of India Mumbai

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Piramal Towers - Mumbai



- **Total employees ~ 7500**
- **Locations/ sites**
 - **9 in India**
 - **5 outside India**
- **18-year CAGR of 29% p.a.**
- **Featured by Forbes magazine in "Best under a Billion" list for 2 consecutive years**
- **Well regarded in the international pharma industry for IP policy and initiatives to strengthen IPR in India**

.....A conglomerate headquartered in Mumbai
with sales over \$ 1 bn Mar'2008

- **Knowledge**

- Building a deep understanding of our customer and domains
- Applying creative / breakthrough ideas for business improvement and growth opportunities

- **Action**

- Execution - meticulous planning and follow through
- Passionate about delivering outstanding results
- Entrepreneurial – continuously exploring business improvement and growth opportunities

- **Care**

- Commitment to our internal and external customers' results
- Create opportunities for personal and professional growth by developing themselves and others

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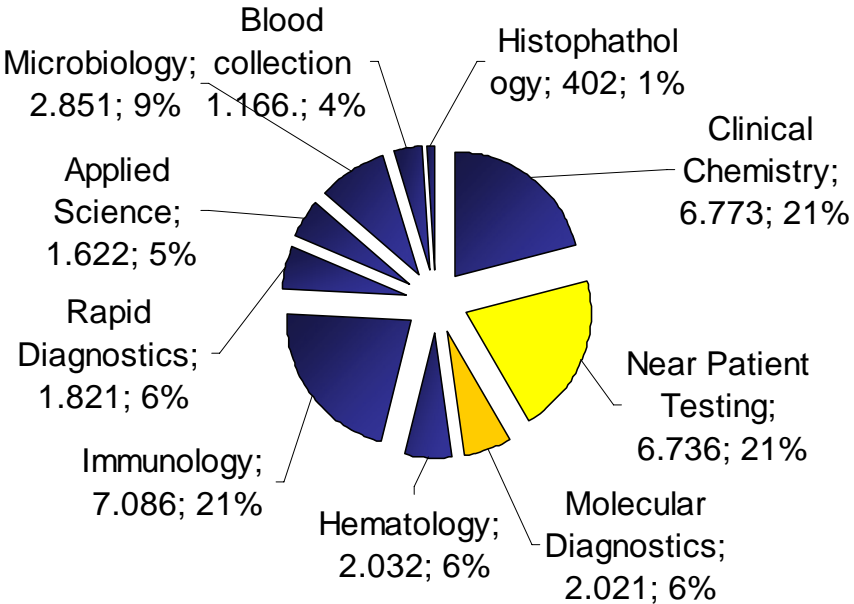
Global IVD vs Indian IVD

Indian IVD MARKET

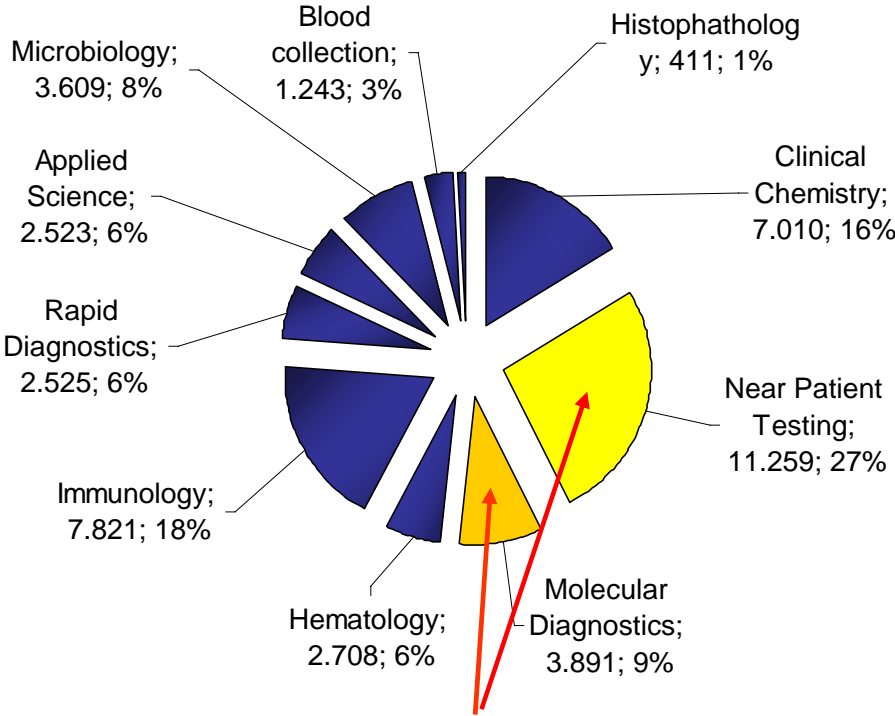
Future of Indian IVD Market

Global IVD market by segment

The global IVD market 2007 by sector
(USD 33,8 - 37,3 bio)

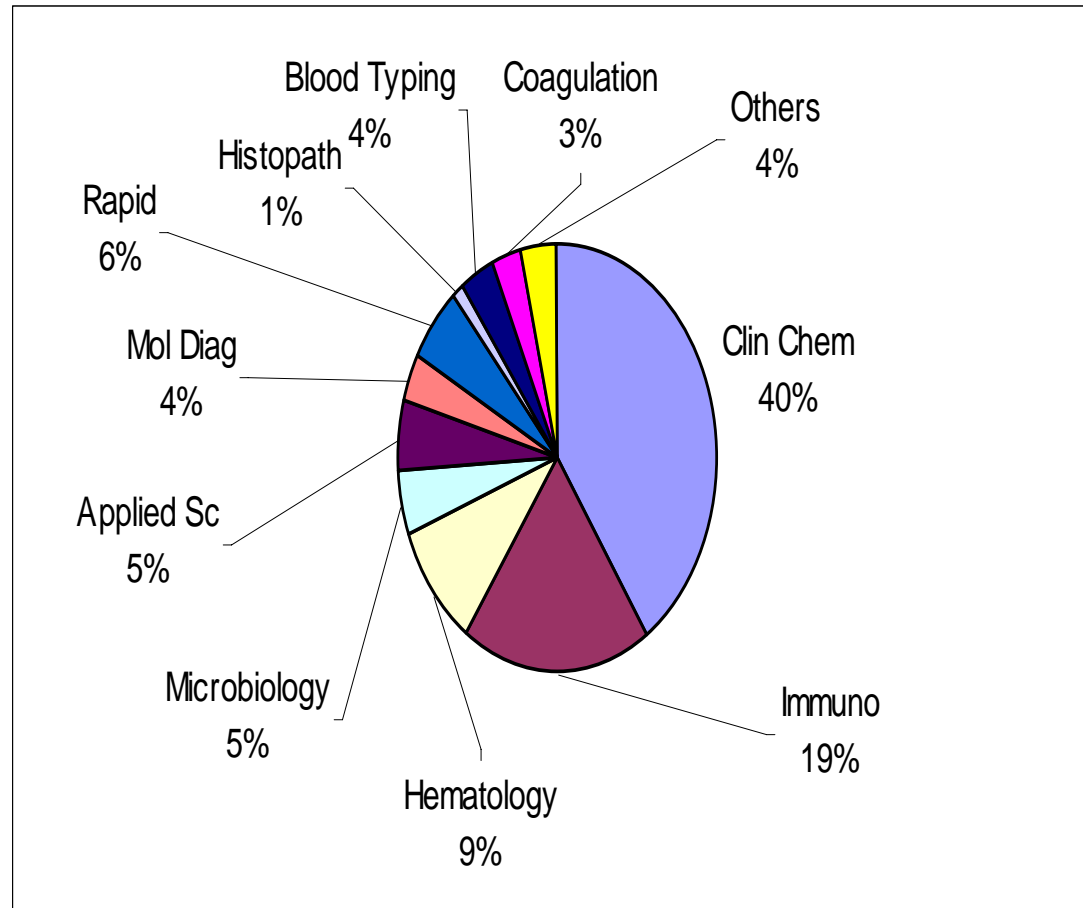


Forecast of the global IVD market by sector in 2010 (~USD 43 bio.)



+20-27% CAGR

IVD Global vs Indian



Global Market – US\$ 37.3bn

Indian Market – US\$ 330 Mio

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Indian – Market Characteristics

- Size - \$ 330 Mio
- 26000 active clinical labs
- Automated labs – 1100
- Growth rate 15% - 16 %per annum
- All major IVD companies directly present in India
- Top Indian IVD companies – Transasia, Tulip Group, Diagnova.

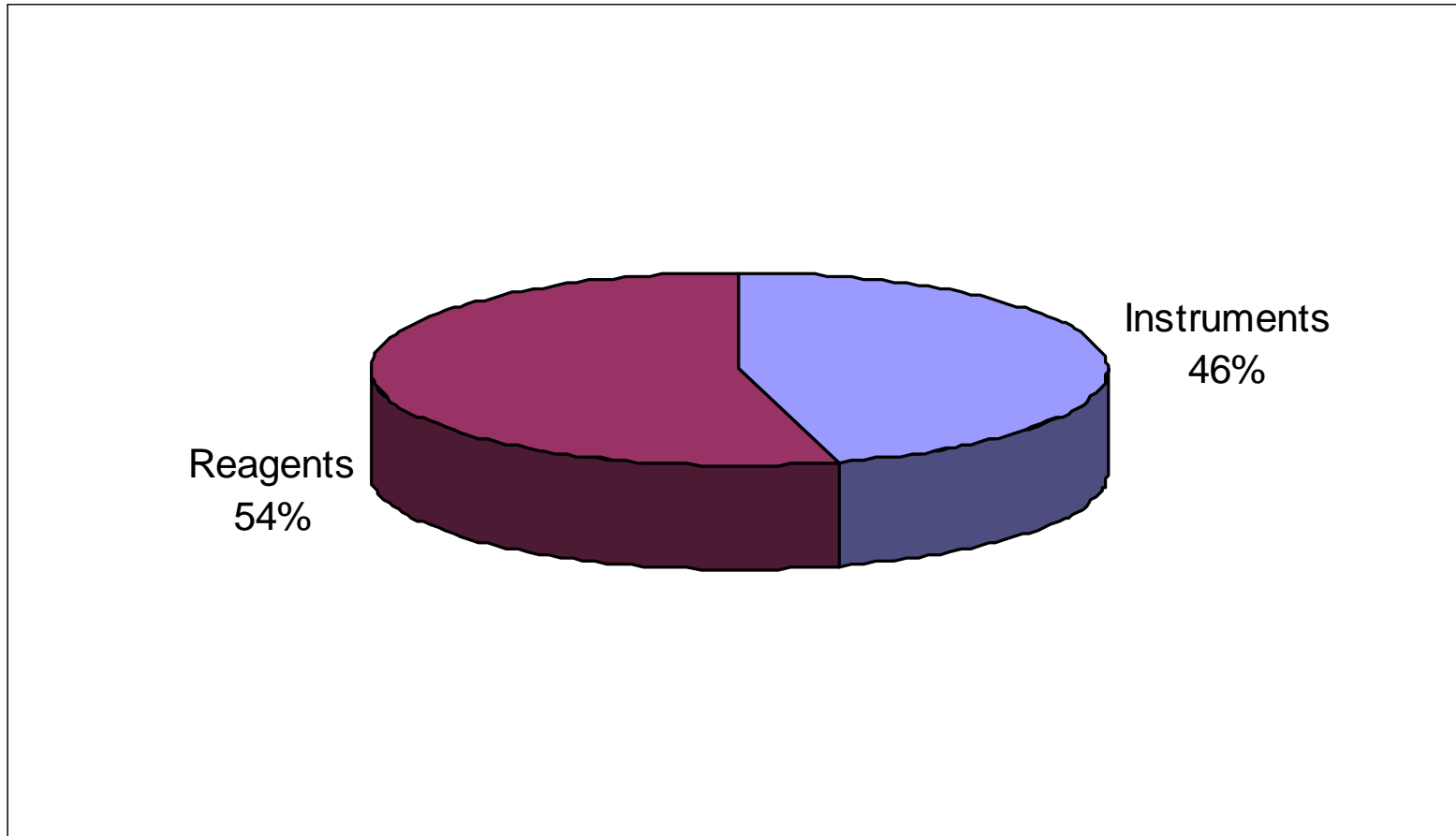
Global Majors Present

- Roche
- Siemens
- Beckman Coulter
- Bio Meriux
- Bio Rad
- Beckton Dickinson
- Randox
- Olympus
- Inverness Medical
- Instrumentation Laboratory
- Sysmex
- Nihone Khoden

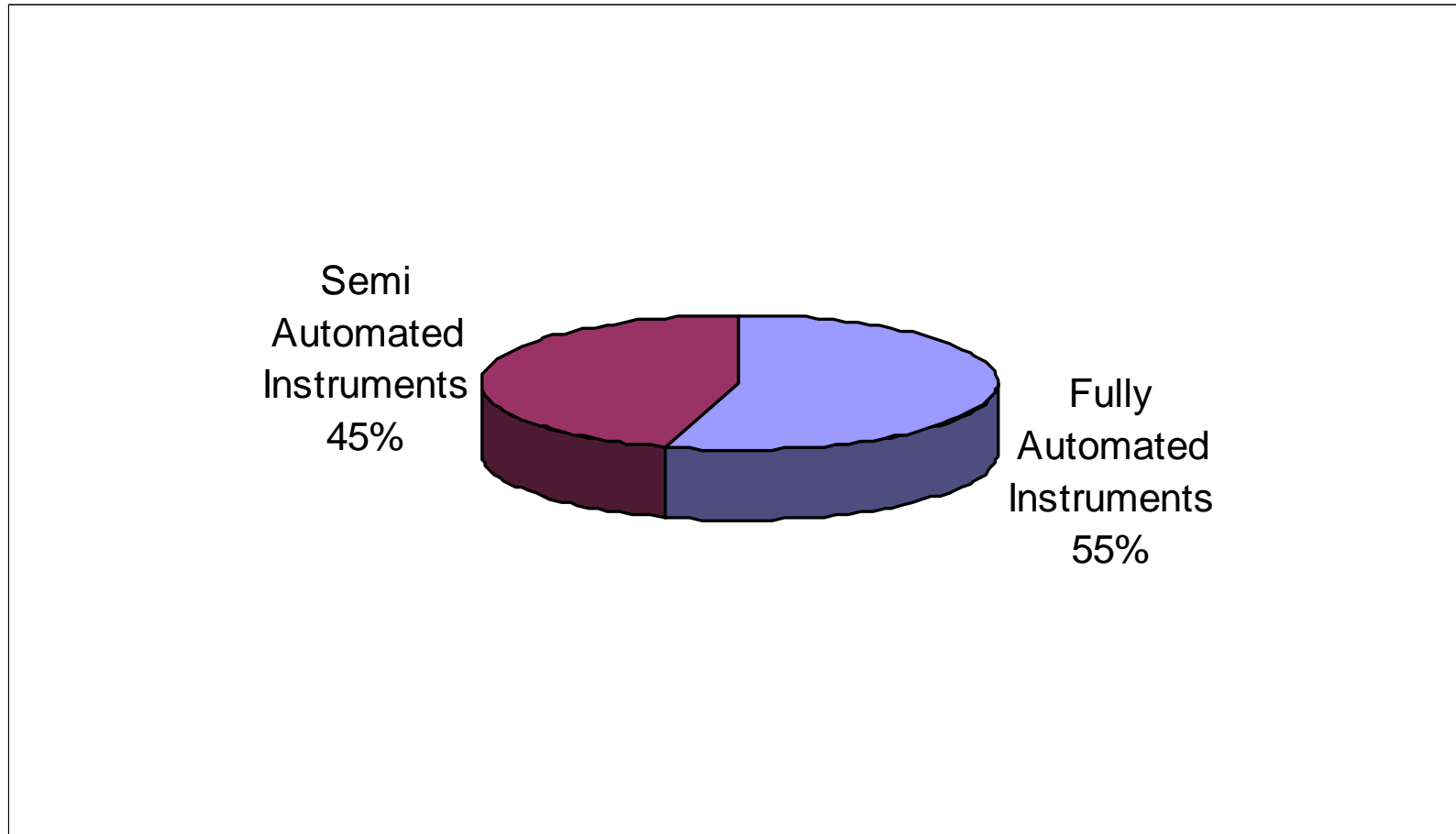
Local Majors

- Transasia
- Piramal Healthcare
- Tulip Group
- Diagnova
- Hi Media
- J.Mitra & Co
- Span Diagnostics
- CPC Diagnostics
- Trivtron Medical
- Agape Diagnostics
- Kopran Ltd

Clinical Chemistry – US \$ 132 Mio

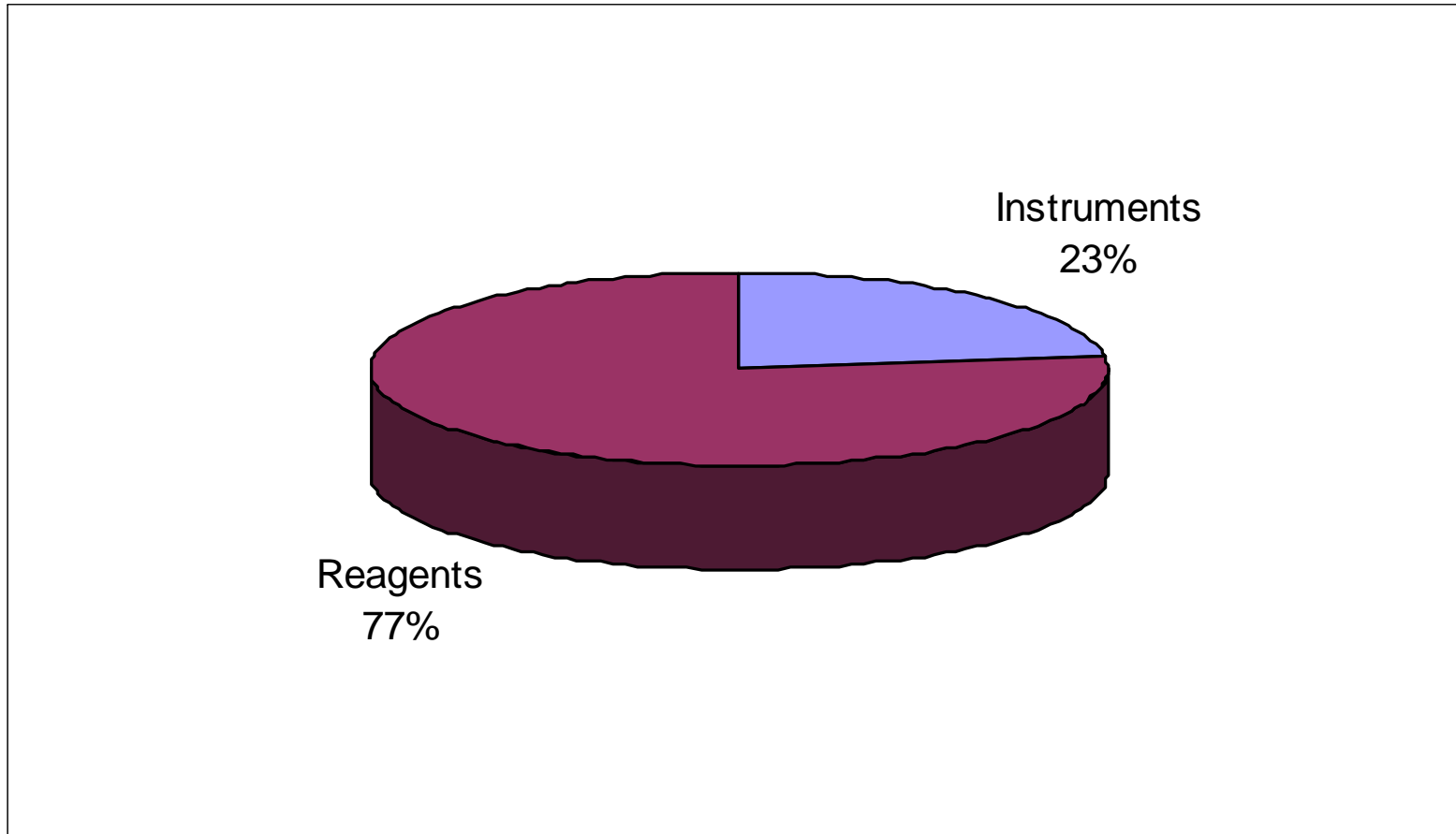


Growth rate – 10%



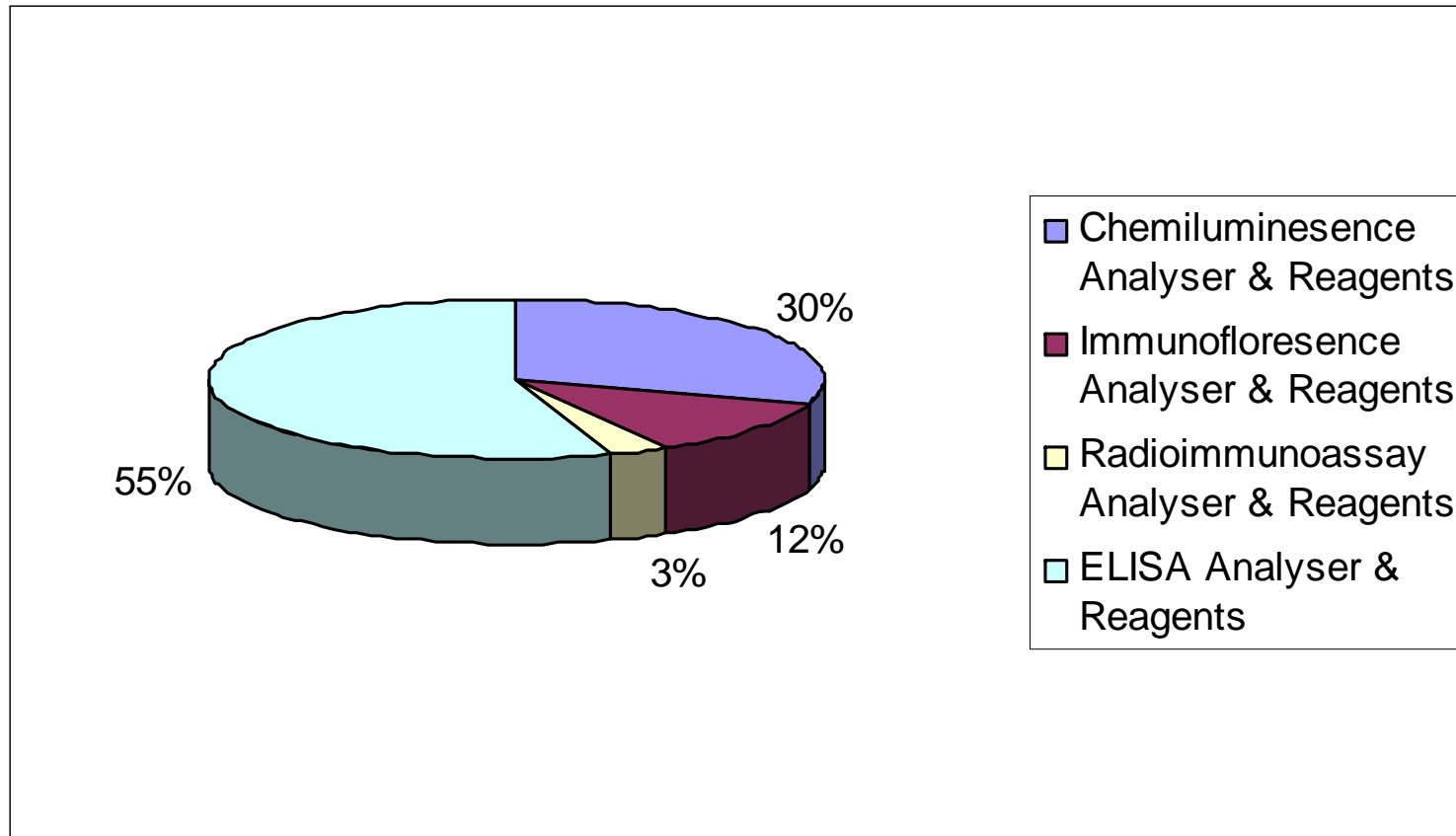
Growth rate – 8%

Immunology Market – US\$ 63 Mio

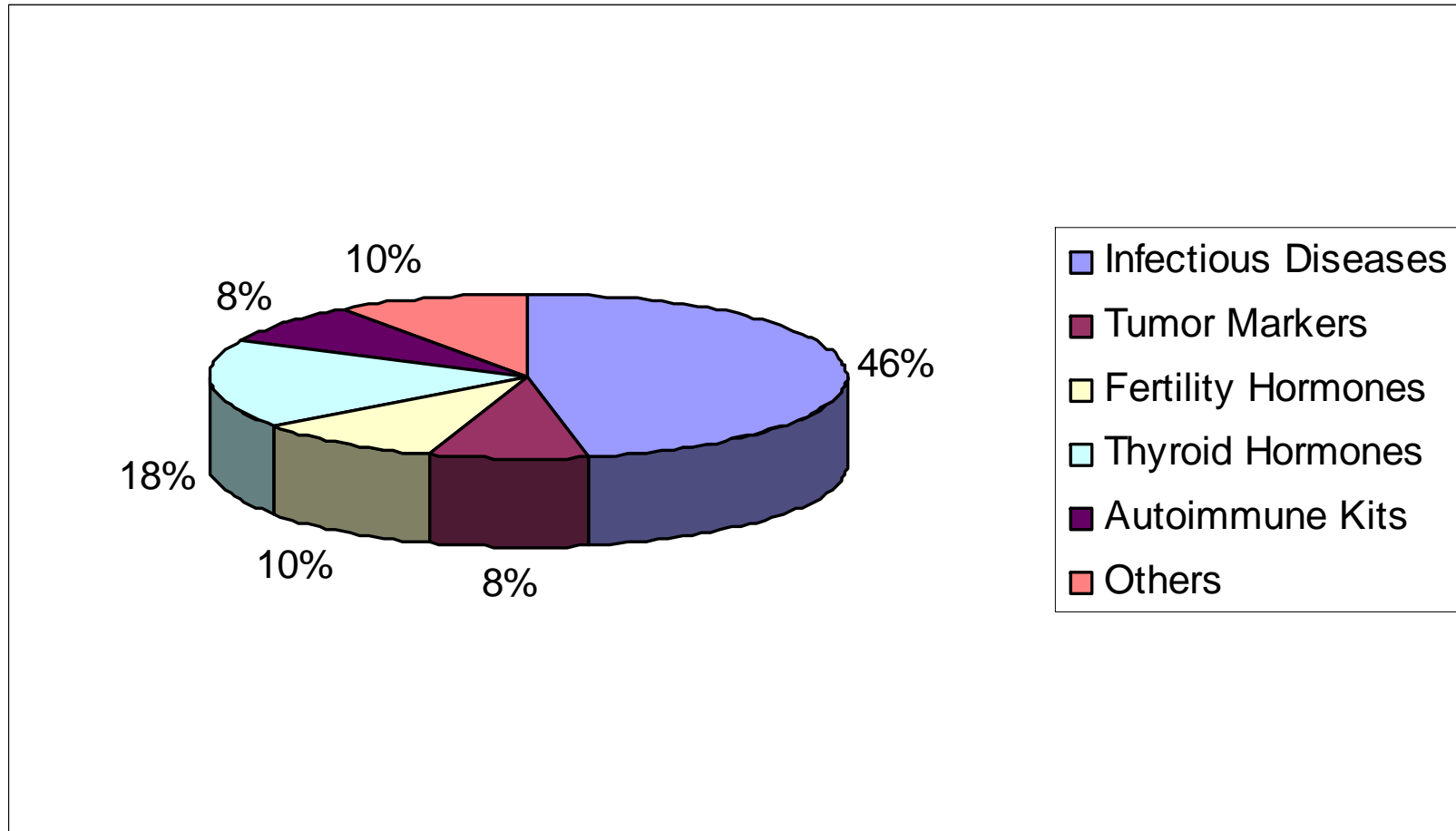


Growth Rate – 15%

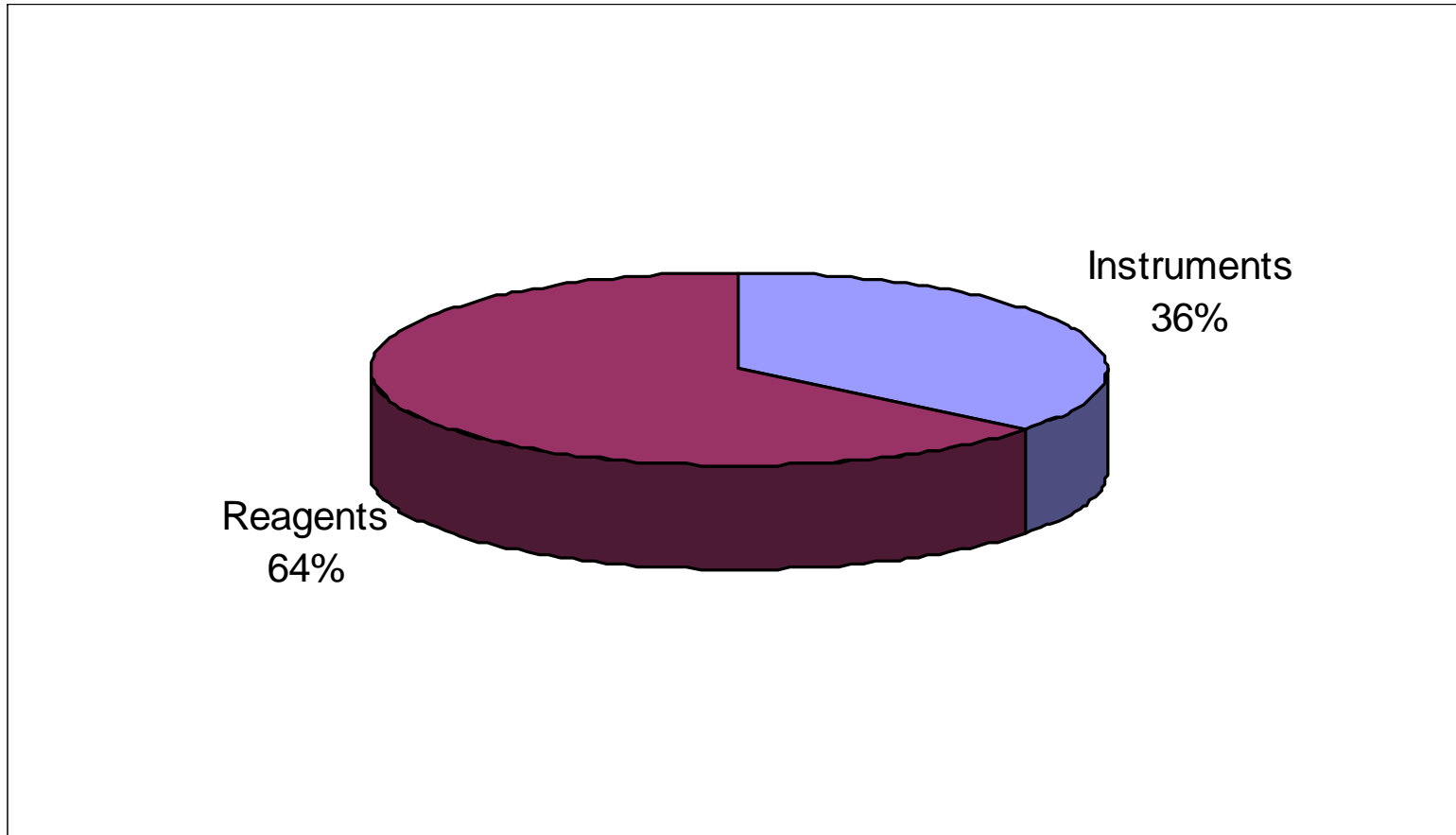
Immunology - Market



Indian Market – US\$ Mio 77

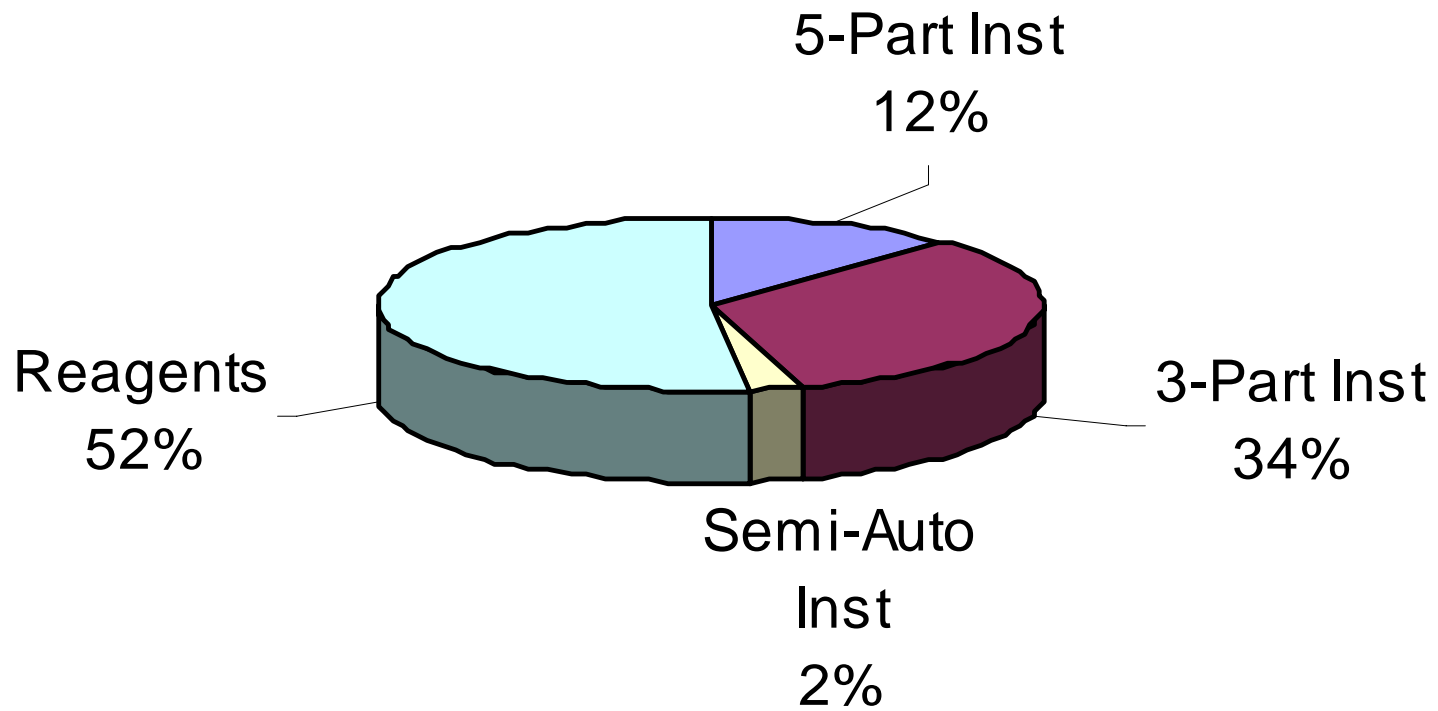


Hematology Market – US \$ 30 Mio

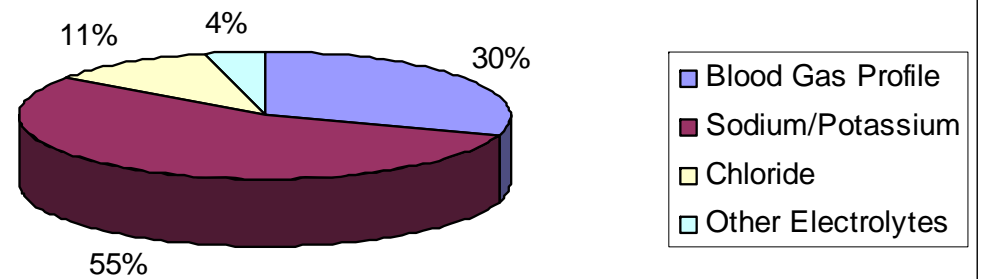
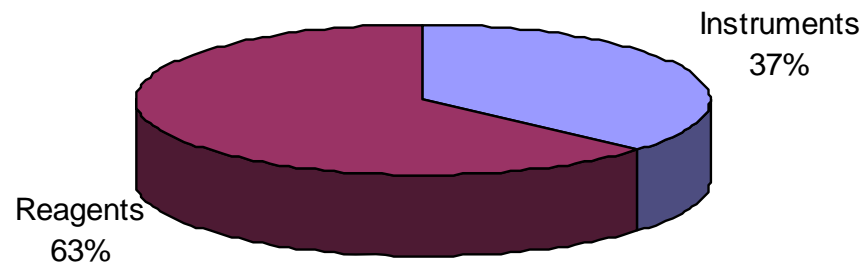


Growth rate – 15%

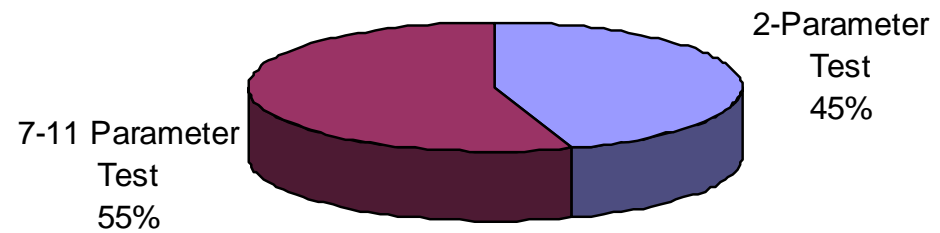
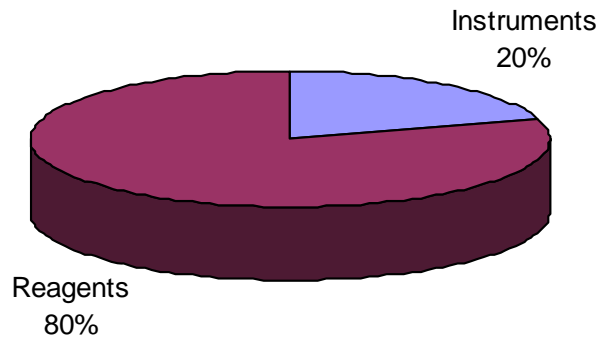
Hematology Market- India



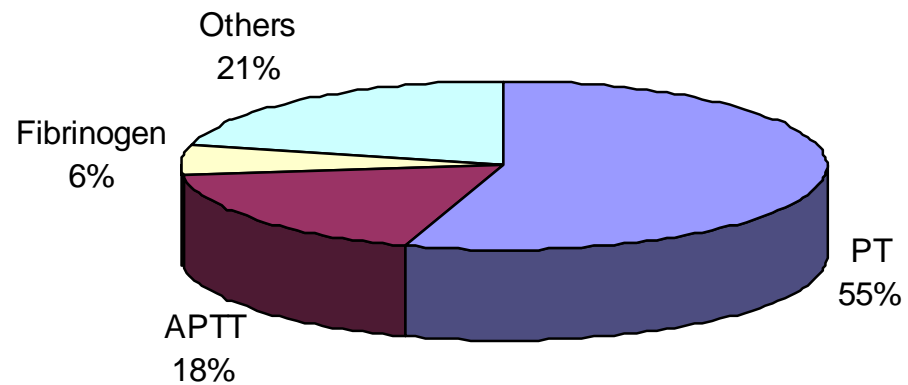
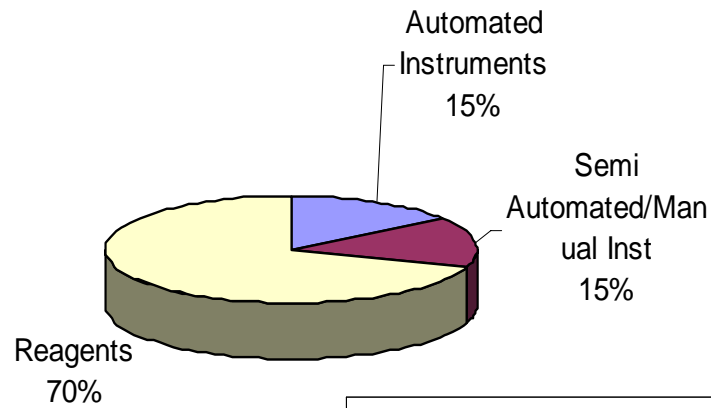
Critical Care Business US \$ 15 mn



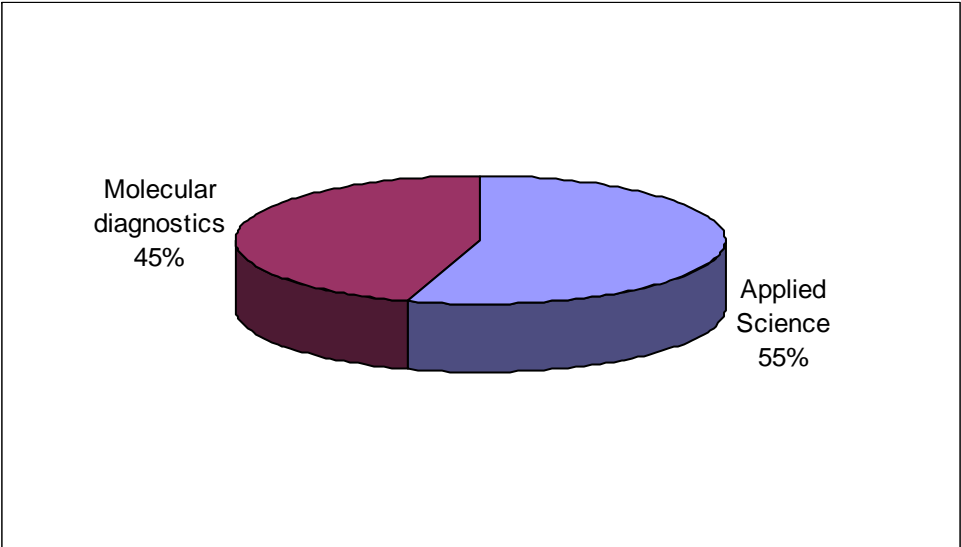
Urinalysis Market – US \$ 9 Mio



Coagulation Market – US \$ 10 Mio



Applied Science & Molecular Diagnostics US\$ 31mn



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- Increasing need to life style diseases testing – Diabetes, CVD, Cancer.
- Growing middle class population, increased awareness.
- Increasing penetration of health insurance.
- Consolidation of labs – Growing lab chains.
- Voluntary accreditation will move to mandatory status.