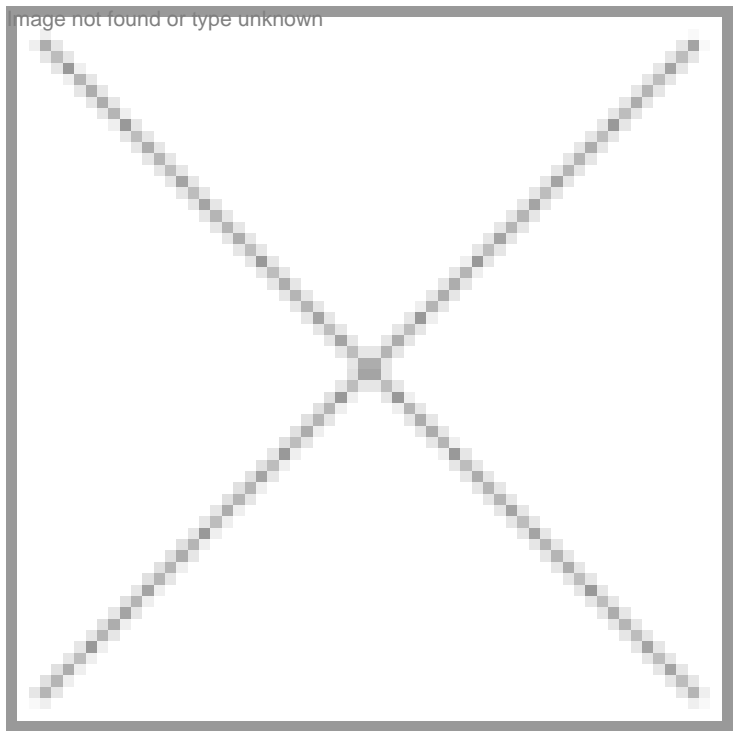
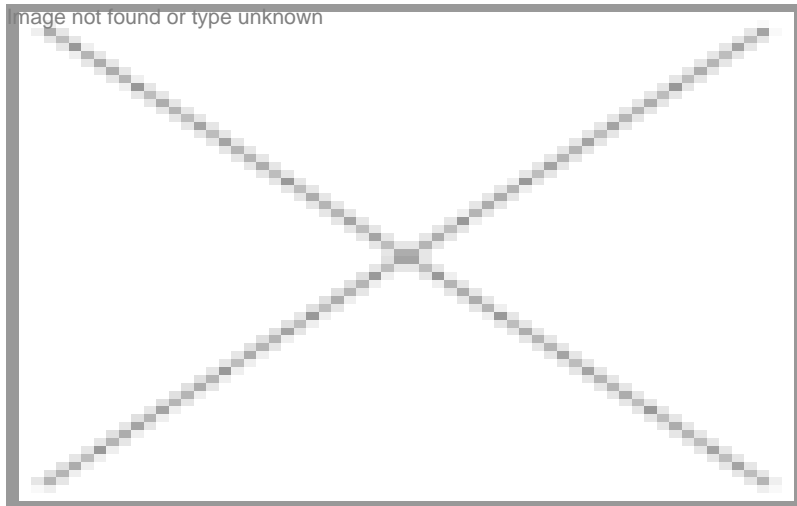


## West retains No 1 position

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Western cluster continues to dominate India's biotech industry with 46 percent share in the overall revenues of Rs 14,199 crore. The 137 companies in the region between themselves clocked Rs 6,631 crore in FY 2009-10 increasing the region's share in the overall revenues by 3 percent over FY 2008-09, thus gaining a lead of 6 percent over South, its close competitor for the top slot.



Not just that, this year, Mumbai outpaced Bangalore to become India's Top Biotech City with a small margin of about Rs 200 crore in terms of revenue. Besides, Gujarat's share in the total revenue has grown by almost 50 percent as compared to its revenues of Rs 755 crore in 2008-09. In Maharashtra, Pune's contribution went down as the leading company of the region Serum Institute of India suffered contract set

So, has South region's position vis-a-vis West worsened since last year? Not really. Given the policy and infrastructure push the situation next year could even see a dramatic shift. South continues to remain India's largest Biotech cluster in terms of the number of companies. In 2009-10, it added another 9 companies-

highest in the country. The region has 172 biotech companies (West has 137 companies), which churned out Rs 5537.68

crore in revenues in FY 2009-10 making up 39 percent of the overall revenues.

In the South region, Karnataka state government has proposed to set up five new biotech parks and has invested Rs 1,100 crore towards new initiatives in 2009-10. Another biotech hub Andhra Pradesh is also setting up a MedTech Valley, a world-class cluster for manufacturing medical devices and equipment near Genome Valley at Shameerpet in Hyderabad. The state government will provide 1,200 acres of land for the project. The project will be executed via a public-private partnership model.

Kerala has also taken steps to jump on the biotech bandwagon. Kerala State Industrial Development Corp (KSIDC) has announced that it will set up a state-of-the-art life science park at Thiruvananthapuram at an estimated cost of Rs 300 crore. The project that will come up in 260 acres at Thonnakkal, would be developed under public-private partnership model. The park will house an incubation center, a technology development center, biotechnology companies, drug discovery companies, pure play firms and also contract research outsourcing units.

Looking ahead, year 2010-15 will see some shifts, specializations and emergence of clear patterns. During this period many of the mega initiatives are likely to take off and have the potential to be a “leap of sorts” that can build a virtuous cycle for the region.

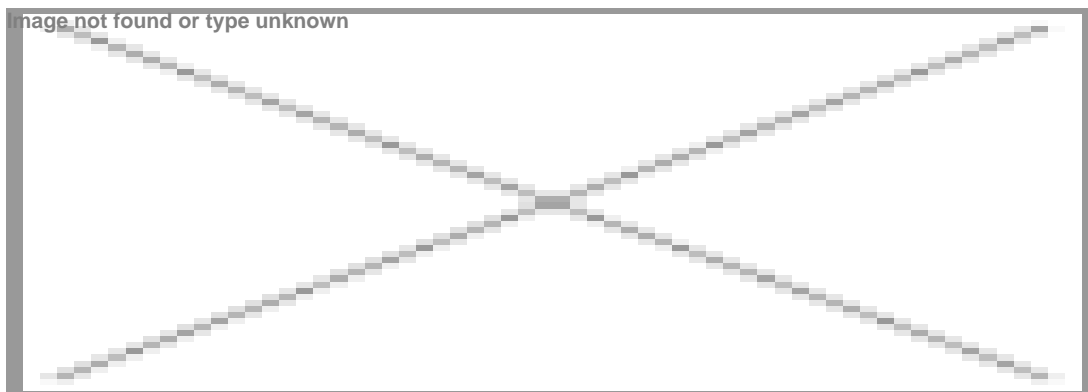
#### **NCR at No 4**

The Northern biocluster “National Capital Region (NCR) has the Top 3 companies contributing 56 percent of the revenues and about 15 percent of the overall industry revenue. This cluster is better known for its research institutes and of course, government bodies.

More recently, the development of 200 acre Health Biotech Science Cluster (HBSC) at Faridabad is underway. A multidisciplinary approach to education and research, this Biotech cluster would comprise Translational Health Science & Technology Institute (THSTI), Regional Center for Biotechnology (RCB) Center for Vaccinology, Molecular Medicine Center, Center for Diagnostics, Biotech Park, Center for Health Science Technology, Center for Platform Technologies, UNESCO Center, Incubator and a Center for Animal Model for Clinical Advances. As a first step, a temporary THSTI lab was recently inaugurated at Gurgaon. This would be shifted to the main site at Faridabad in two-three years after the infrastructure is ready.

Besides, there is the biotech park at Lucknow offering a very good platform for the small and medium biotech companies to do research, collaborate and expand their business. The Biotech Parks at three locations -Sitapura-Jaipur and Chopanki, Bhiwadi (Alwar), and Borandi, Rajasthan have been initiated by Rajasthan State industrial Development & Investment Corporation (RIICO). Then, there is the proposed biocluster at Mohali (Punjab), upcoming biotech park at Chandigarh (Punjab) and another one at Nalagarh in Himachal Pradesh- all this is expected to provide the much needed boost to the biotech companies in the North region.

#### **Biotech Revenue Cluster Trend (2002-10)**



• Top 10 companies in the West have 43% share in the region.

• Serum Institute of India (Rs 850 crore), the region's No 1 company makes up for about 13% of the region's revenue and contributes 6% to the overall industry revenue.

• West is also base for top bioagri companies such as Monsanto, Mahyco and Ajeet Seeds.

• MNCs like GlaxoSmithKline, Roche, Aventis Pharma, Wyeth, Quintiles are also headquartered in the region.

• Four of India's top 10 services companies (CROs) are also based out of West, including the No 1 CRO in the Indian

industry â€™ Quintiles India (Rs 375 crore)

### Top Companies in West

Company	2009-2010 (Revenue in Rs Cr)	% Share in Region	% Share of Total Biotech
Serum Institute of India*	850	12.82	5.99
Reliance Life Sciences*	450	6.79	3.17
Quintiles*	375	5.66	2.64
Mahyco	312	4.71	2.20
Monsanto*	255	3.85	1.8
Bharat Serums	175	2.64	1.23
Haffkine Biopharma	168.98	2.55	1.19
Siro Clinpharm	150	2.26	1.06
Cadila Healthcare	147.48	2.22	1.04
Lambda Therapeutic Research*	145	2.19	1.02
Ajeet Seeds*	103	1.55	0.73
Top 10 West	2883.46	43.48	20.31
<b>Total West</b>	<b>6631.01</b>		<b>46.70</b>

### Top Companies in South

Company	2009-2010 (Revenue in Rs Cr)	% Share in Region	% Share of Total Biotech
Biocon	1180	21.31	8.31
Nuziveedu Seeds	476.86	8.61	3.36
Rasi Seeds	358.78	6.48	2.53
NovoNordisk*	342	6.18	2.41
Shantha Biotech	334.23	6.04	2.35
Indian Immunologicals	272.87	4.93	1.92
Bharat Biotech	271.66	4.91	1.91
Novozymes South Asia	268	4.84	1.89
Syngene International	252	4.55	1.77
Ecron Acunova	97	1.75	0.68
Top 10 South	3853.40	69.59	27.14
<b>Total South</b>	<b>5537.68</b>		<b>39.00</b>

### Top Companies in North

Company	2009-2010 (Revenue in Rs Cr)	% Share in Region	% Share of Total Biotech
Panacea Biotec	703.19	34.63	4.95
Jubilant Organosys	249.30	12.28	1.76
Eli Lilly	186.72	9.20	1.32
Top 3 North	1139.21	56.11	8.02
<b>Total North</b>	<b>2030.48</b>		<b>14.30</b>

\*BioSpectrum estimates

All figures in Rs. Crore unless indicated otherwise