

PUBLIC PRIVATE PARTNERSHIP (PPP) OPPORTUNITIES IN HEALTHCARE & PHARMA

Perspectives & Learnings From India

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INDIAN HEALTHCARE & PHARMA LANDSCAPE

Population: ~1.4 Billion with rising middle class and aging demographics

IN 5th Largest Economy with rapidly expanding healthcare demand

Healthcare Market:

~\$370 Billion (2024) → Expected ~\$600+ Billion by 2030

Policy & Reform Push

- Ayushman Bharat (world's largest public health insurance scheme)
- Production Linked Incentive (PLI) schemes
- Digital Health Mission (ABDM)
- Increasing PPP-based healthcare delivery models

Pharmaceutical Market:

~\$65 Billion (2024) → ~\$130 Billion by 2030

Global Leadership

- Supplies ~20% of global generic medicines
- Accounts for ~60% of global vaccine demand
- Known as the “Pharmacy of the World”

Strong Ecosystem

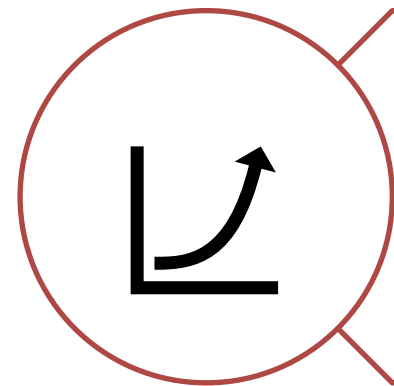
- 1000+ pharma companies, 3000+ drug manufacturers
- World-class institutes: AIIMS, IITs, NIPER, CSIR labs, DBT labs

GLOBAL HEALTHCARE LANDSCAPE



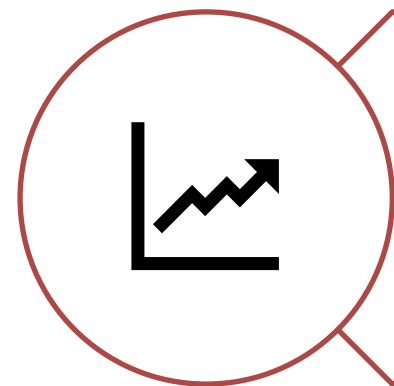
CURRENT MARKET (2023)

~\$ 11.59 trillion



PROJECTED GROWTH

~\$ 15.6 trillion by 2028



**COMPOUND ANNUAL
GROWTH RATE**

~ 6.8%

KEY GROWTH DRIVERS

**Aging global population
and Increasing life
expectancy**

**Rising prevalence of
chronic diseases**
(Diabetes, Cardio and
CNS)

**Healthcare Policy
Reforms**

Technology (AI, Robotics
and Datamatics)

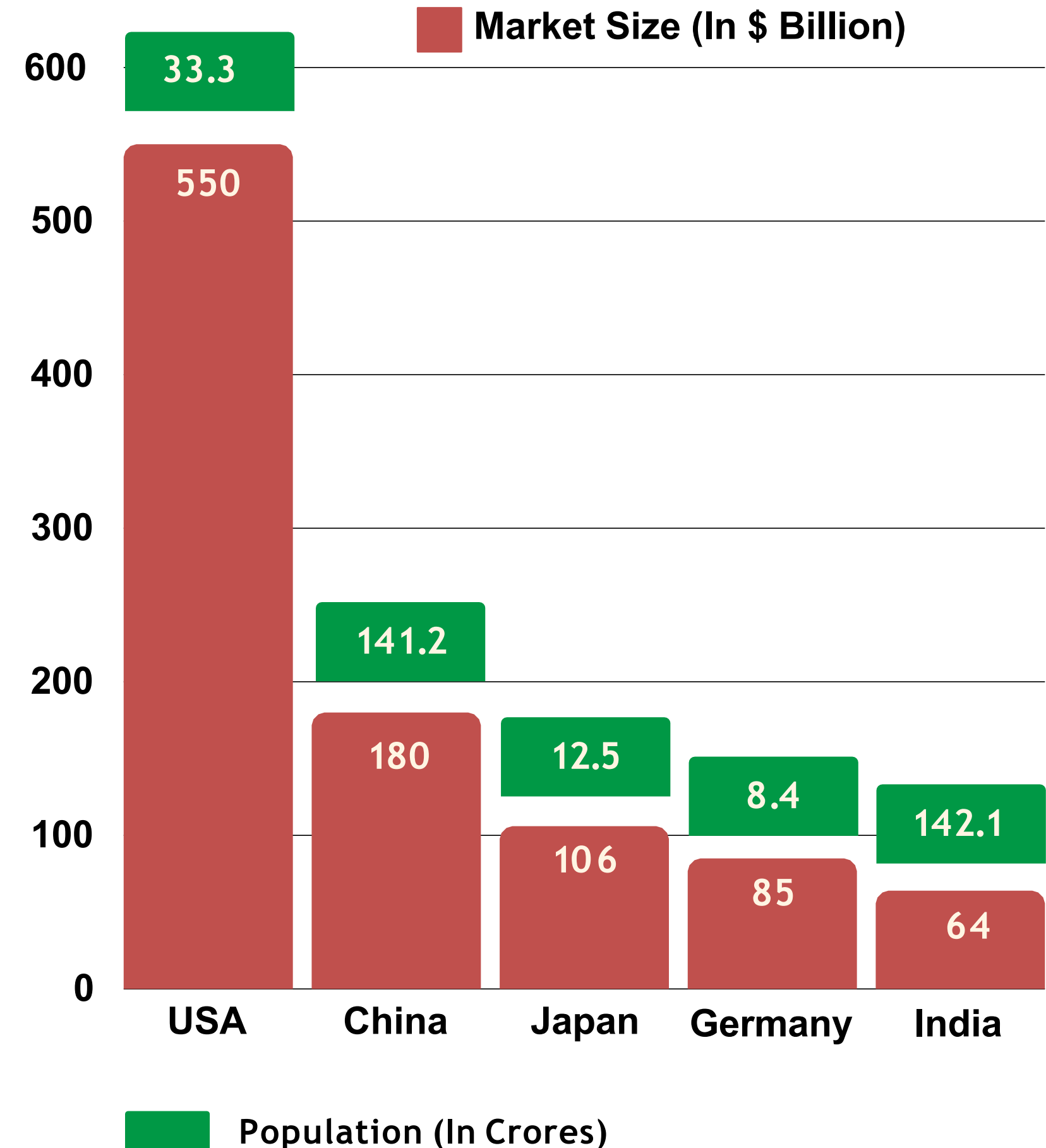
**Increased GDP Spends
on Healthcare**

GLOBAL PHARMACEUTICAL SCENARIO

- Current ~ **\$ 1.48 Trillion 2023**
- Projected ~ **\$ 2.1 Trillion by 2030**
- Growth Rate ~ **5.7%**

KEY MARKET SEGMENTS

Prescription Drugs ~ 60-70% Market		
Generic Drugs ~ 15-20%	Over-the-Counter (OTC) Drugs Growing ~ 10-15%	Biologics and Biosimilars Fast-growing ~ 12-15%



INDIAN PHARMACEUTICAL INDUSTRY

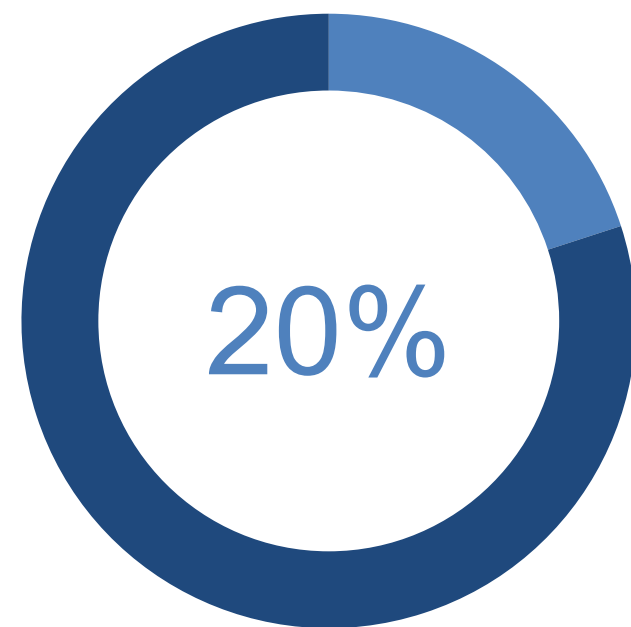
Pharmaceutical market size in India in 2024



The market is expected to grow to **\$130 Bn by 2030**

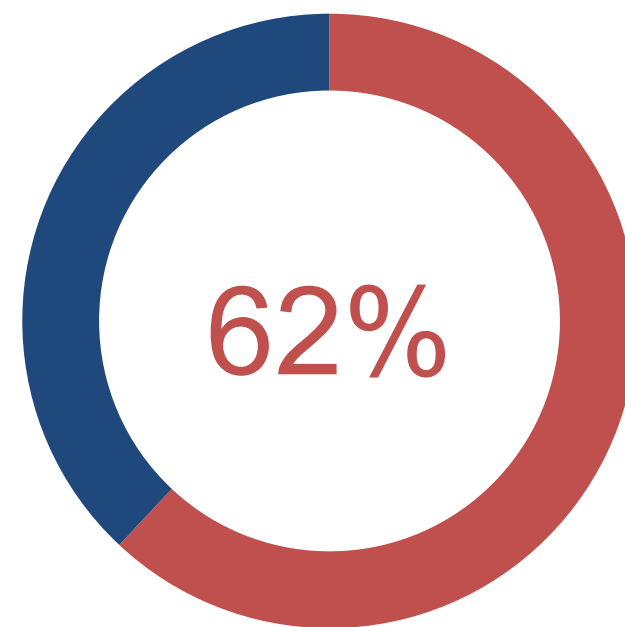
9.4 % CAGR of Sector in past 9 years

Global demand for generic medicine fulfilled by India



Largest Provider in the world

Global demand for vaccines fulfilled by India



Largest Producer in the world

CARVING A NICHE ROLE IN THE GLOBAL PHARMA INDUSTRY

Generic Drugs

OTC Medicines

Bulk Drugs

Vaccines

Contract Research and Manufacturing

Biosimilars and Biologics

PUBLIC PRIVATE PARTNERSHIP (PPP) OPPORTUNITIES IN INDIA

1

BUILDING HOSPITAL INFRASTRUCTURE

India hospital market:

~\$99 Billion (FY23) → ~\$193 Billion by FY32

1. Strong demand driven by **1.4 billion population** and rising NCD burden
2. **India's Hospital bed Density:**
 - Total Hospital Bed Density - 1.3 – 1.6 / 1000 Population
 - Global Average (OECD) – 4-5 / 1000 population
 - Japan - 12- 13 / 1000 population
3. **Large Public Infra gaps** → especially in Tier-2/3 cities
4. **India needs ~2.4 million additional beds to reach global standards**
5. **Larger Demand against the existing Supply side, Ideal for PPP collaboration**

Where Could Japan Leverage ?

- Investment in **multi-specialty hospitals (PPP model)**
- **Technology-enabled hospitals** (robotics, precision diagnostics)
- **Long-term O&M contracts** (Japanese hospital management expertise)

Impact to India

- Faster infrastructure expansion without full public capex
- Improved quality & efficiency of care
- Increased access in underserved geographies

2

EXPANSION OF HEALTH INSURANCE

Pradhan Mantri Jan Arogya Yojna (PMJAY)

Ayushman Bharat:

- World's largest public health insurance scheme
- Covers hospitalization for low-income population
- Rapid growth of private insurance + digital claims ecosystem

Ayushman Bharat covering **500+ million beneficiaries**

Where Could Japan Leverage ?

- Insurance analytics & risk modelling
- Claims management systems
- Elderly care insurance models (Japan expertise in aging population)

ADVANCED TREATMENT TECHNOLOGY: CANCER CARE, CARDIOLOGY & NEUROLOGY

Indian Scenario

- Rising burden of NCDs (cardiac, cancer, diabetes)
- High-end treatment infrastructure still limited in Tier-2/3 cities
- Increasing demand for **precision medicine & advanced devices**

Where Could Japan Leverage ?

High-end medical technologies:

- Oncology (proton therapy, advanced radiology)
- Cardiac devices
- Neuro-interventions

4

PHARMA PARK & MEDICAL DEVICE PARK


- Govt of India is promoting **plug-and-play pharma & medtech parks**
- **Pharma Park - 03**
Developed Under Scheme for Promotion of Bulk Drug Parks
States:
 - Himachal Pradesh
 - Gujarat
 - Andhra Pradesh
- **Med Tech Park - 04**
Developed Under Scheme for Promotion of Medical Device Parks
States:
 - Uttar Pradesh
 - Tamil Nadu
 - Madhya Pradesh
 - Himachal Pradesh


Where Could Japan Leverage ?

- High-value manufacturing (devices, specialty pharma)
- Setting up units in Medical Device Parks (e.g., YEIDA)
- Joint R&D and contract manufacturing


Lalitpur Mega Pharma Park | 1472 Acres

Physical Infrastructure

 **Roads**
3.29 Kms.

 **Boundary Fencing**
~ 8.0 Kms.

 **Storm Water Drains**
~ 8.0 Kms.

 **Common Logistics**
6.28 Acres

Technology Centres

Common Laboratory

7,900 Sqm.

Centre of Excellence (Admin)


2,600 Sqm.


Emergency Response Centre


2,600 Sqm.


Utilities


 **Solid Waste Management** **3.53 TPD**


 **Solvent Storage Yard** **240 KL**


 **Waste Water Management** **4.57 MLD CETP**

 **Steam Generation & Distribution** **75 TPH**

 **Solvent Recovery** **60 KL/Day**

 **Reliable Power** **33/11 KV SS (2 Nos.)**

 **Common Warehousing** **2013 Sqm.**

 **24x7 Quality Water** **6.44 MLD WTP, Dstn. Network**

 **Smart Solutions** **CCTV Surveillance**

GREEN/CLEAN SOLUTIONS



SUPPORT FOR MSME DEVELOPMENT



EMERGENCY CENTRE



Medical Device Park, Uttar Pradesh

YEIDA - Medical Device Park in Sector 28

YEIDA's Medical Device Park is envisioned as **India's first integrated hub for Medtech innovation**

- Gamma Irradiation Facility
- Central warehouse with 12 other reserved warehouse facilities

- State SGST reimbursement
- Capital Interest Subsidy etc

- Rapid Prototyping, IoT & AI Labs, Bio-Testing & more
- Accelerates R&D and reduces setup cost

- 350-acre park | 101+ plots allotted
- Active construction & FDI inflows

- 5 mins from Noida International Airport
- Seamless expressway & proposed rail link

- Supported by UP Govt. & Central Scheme
- A cornerstone for an Atmanirbhar Bharat



Common Scientific Facilities

**3-D view and actual view of CSF-1:
Common IT Facilities**



**3-D view and actual view of CSF-2:
IOMT & AIML**



**3-D view and actual view of CSF-3: Electronic System
& Design Facilities**



**3-D view and actual view of CSF-4: Electronic
Assembly Facility**



**3-D view and actual view of CSF-5: Rapid Prototyping
& Testing Lab**



3-D view of CSF-6: Bio-Material Testing Facility



India is a **major global clinical research destination**

Advantages:

- Large patient pool
- Diverse Disease Profile
- 30–50% lower cost vs developed markets
- Strong pharma base + regulatory strengthening
- Increasing push for streamlined approvals & digital platforms

Where Could Japan Leverage ?

1. Sponsor-driven clinical trials
2. Collaboration with Indian hospitals & CROs
3. Joint innovation in:
 - Medical Devices & Diagnostics
 - Oncology
 - Rare diseases
 - Biosimilars

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UP FDI, FCI, Fortune Global & India 500 Companies Investment Promotion Policy 2023

In a first-ever initiative of its kind in India, State Government of Uttar Pradesh, in its attempt to entice global investments, launched a dedicated policy to incentivise FDI/FCI, Fortune Global 500 & Fortune India 500 companies' investing in UP

Eligibility

- **FDI-FCI/ Fortune Global 500 and India 500 listed companies** setting manufacturing and service units
- Minimum **Capital Investment requirement of INR 1billion and above**

INCENTIVE PACKAGE	Front end Land Subsidy up to 80% on Govt land	Capital Subsidy up to 35% of ECI in 7 annual instalments	Net SGST Refund or SGST Refund on Capital Goods
100% Stamp Duty & Registration Fees Waiver	100% Exemption of Electricity Duty for 5 years	Green Industry Incentives up to ₹25 million	Logistics Subsidy up to ₹20 million for plant relocation
Skill Subsidy: Training for 500 persons @ \$60/person/month for 5 years	Refund of Patent Registration Fees up to ₹1 million (Domestic), ₹2million (International)	Grant for setting up R&D Centre or Centre of Excellence up to ₹100 million	Industrial Housing up to ₹100 million

CONCLUSION

1. Policy Alignment

Stable, predictable regulatory framework
Single-window clearances

2. Infrastructure Expansion

PPP-based hospitals, labs, research centres

3. Innovation Ecosystem

AI, digital health

4. Global Partnerships

Collaboration with pharma majors & research institutions

5. State-Level Leadership (UP Model)

Large market + strong policy + infrastructure

“India is aspiring to be the next growth engine in healthcare & pharma the world and is shifting from Pharmacy of the World to Global Innovation Hub”