

INTERNATIONAL DIVISION

INDIA CALLING 2009

India-Europe Business Partnership Summit

Brussels, Belgium, October 2, 2009

Mrs Elisabeth HERVIER

Vice-President of the Paris Chamber of Commerce & Industry

In charge of International South Asia area

CEO, EH Pharma Partner - Paris - France.



Chambre de commerce
et d'industrie de Paris

INTERNATIONAL DIVISION

A FEW WORDS ABOUT CCIP:

➤ **Representing company interests:**

Interacting regularly with local, national and European authorities it recommends regulatory and legislative evolutions.

➤ **Accompanying firms:**

- Favouring the conquest of new markets [190 000 international procedures]
- CCIP organised regularly seminars and trade forums dedicated to India.
- International network: CCIP has opened its representative office in India in 2007 (Mumbai)

➤ **Developing the attractiveness of the Capital Region:**

- Representing and accompanying businesses in France, in Europe, in the world.
- World economic metropolis: "Paris Development Agency", "Paris Capitale Economique" and Office of Tourism of Paris go regularly to India to strengthen Indo-French relations.

➤ **Finding and developing the skills** that companies require:

- Education and permanent training: 15 000 students and 30000 adults educated each year in the 12 schools of the CCIP including business schools.
- 55 countries and almost 400 partnership agreements with academic institutions around the world.: HEC, ESCP-EAP and ADVANCIA-NEGOCIA signed agreements with Indian Institutes.



INTERNATIONAL DIVISION

1. French pharmaceutical industry

1.1. French pharmaceutical market

1.2. Life sciences clusters

2. Focus on the Paris Region

2.1. The Paris Region "Biocluster"

2.2. Paris Region strengths

2.3. Business facilities

3. Indo-French relations

3.1. Commercial relationship

3.2. CAFI, Indo-French Business Club

3.3. Indian success stories in France

Sources: AFII, LEEM, PREDA

GENERAL CONTEXT OF FRANCE



- 5th worldwide economy
- Population of 65 million
- Central location in Europe
- Good logistics infrastructures: highways, high-speed railways, harbours, international airports.



Chambre de commerce
et d'industrie de Paris

FRENCH PHARMACEUTICAL MARKET

1. French pharmaceutical industry

1.1. French pharmaceutical market

1.2. Life sciences clusters

2. Focus on the Paris Region

2.1. The Paris Region "Biocluster"

2.2. Paris Region strengths

2.3. Business facilities

3. Indo-French relations

3.1. Commercial relationship

3.2. CAFI, Indo-French Business Club

3.3. Indian success stories in France

Sources: AFII, LEEM, PREDA

France has traditionally been a major force in biology, medicine and pharmaceuticals. French pharmaceutical industry is among the world's leading economic sectors, and one of the most knowledge-intensive and research-rich sector of the French economy.

The strength of French pharmaceutical industry:

- Europe's leading producer of medicinal products (220 plants)
- Turnover of €42 billion, i.e. 1% of GDP
- 101,500 employees
- No.5 global exporter of medicinal products
- 4th-largest market in the world, 2nd in Europe
- Sales revenues of €47 billion in 2008 (45% from exports)
- SANOFI – AVENTIS is the 5th worldwide pharmaceutical firm with more than 40 sites and 28 000 employees..

France has a real well established industry thanks to its strong national market, outstanding training system, talented workforce, and its world recognized research.



INTERNATIONAL DIVISION

LIFE SCIENCES CLUSTERS

1. French pharmaceutical industry

1.1. French pharmaceutical market

1.2. Life sciences clusters

2. Focus on the Paris Region

2.1. The Paris Region "Biocluster"

2.2. Paris Region strengths

2.3. Business facilities

3. Indo-French relations

3.1. Commercial relationship

3.2. CAFI, Indo-French Business Club

3.3. Indian success stories in France

Sources: AFII, LEEM, PREDA

The French Government has supported the creation of bio-clusters able to rank among the world elite biocenters, bringing together young emerging companies, universities, mature companies...

International pharmaceutical clusters



8 global competitiveness clusters + 1 cluster dedicated to pharmaceutical industry.



Chambre de commerce et d'industrie de Paris

INTERNATIONAL DIVISION

1. French pharmaceutical industry

1.1. French pharmaceutical market

1.2. Life sciences clusters

2. Focus on the Paris Region

2.1. The Paris Region
"Biocluster"

2.2. Paris Region strengths

2.3. Business facilities

3. Indo-French relations

3.1. Commercial relationship

3.2. CAFI, Indo-French Business Club

3.3. Indian success stories in France

Sources: AFII, LEEM, PREDA

FOCUS ON THE PARIS REGION

- Population 11.6 million, working force 5, 5 million
- 610,000 companies
- Europe's no.1 region for GDP: €481 billion
- Second most popular location for the world's leading corporations

- 173,200 people working in Research & Development
- 296 patents per million of population

- 17 universities covering all disciplines



Chambre de commerce
et d'industrie de Paris

1. French pharmaceutical industry

1.1. French pharmaceutical market

1.2. Life sciences clusters

2. Focus on the Paris Region

2.1. The Paris Region "Biocluster"

2.2. Paris Region strengths

2.3. Business facilities

3. Indo-French relations

3.1. Commercial relationship

3.2. CAFI, Indo-French Business Club

3.3. Indian success stories in France

Sources: AFII, LEEM, PREDA

THE PARIS REGION « BIOCLUSTER » (1/2)

➤ Biotechnology

- 50% of French biotechnology companies are located in Paris Region, i.e. nearly 200 companies accounting for 4,000 jobs
- International leaders presence in biotechnology: Amgen, Biogen Idec, Genzyme.

➤ Pharmaceutical industry

- 57% of French pharmaceutical operations are located in Paris Region, i.e. more than 324 companies
- International leaders presence in Pharmaceutical industry: Sanofi-Aventis, Servier, GSK, Johnson & Johnson, Novartis, Lilly.



1. French pharmaceutical industry

1.1. French pharmaceutical market

1.2. Life sciences clusters

2. Focus on the Paris Region

2.1. The Paris Region "Biocluster"

2.2. Paris Region strengths

2.3. Business facilities

3. Indo-French relations

3.1. Commercial relationship

3.2. CAFI, Indo-French Business Club

3.3. Indian success stories in France

Sources: AFII, LEEM, PREDA

THE PARIS REGION « BIOCLUSTER » (2/2)

➤ Contract Research Organisation / Clinical trials

- 80% of French Contract Research Organisations
- 600 healthcare institutions with a total of 80,000 beds
Including Europe's biggest hospital network: AP-HP (Assistance Publique-Hôpitaux de Paris) with 37 hospitals and 23,000 beds. AP-HP is also France's leading promoter of clinical trials.
- 48,000 doctors (24% of the national total)
- Large pool of potential trial recruits
- Highly competitive costs (20 to 30% lower than in UK and Germany).

➤ World-Class research institutions

- 50% of France's academic research.
- Prestigious, world-renowned institutions such as the Pasteur Institute and CNRS (National centre for scientific research), INSERM (French national medical research institute).



INTERNATIONAL DIVISION

1. French pharmaceutical industry

1.1. French pharmaceutical market

1.2. Life sciences clusters

2. Focus on the Paris Region

2.1. The Paris Region "Biocluster"

2.2. Paris Region strengths

2.3. Business facilities

3. Indo-French relations

3.1. Commercial relationship

3.2. CAFI, Indo-French Business Club

3.3. Indian success stories in France

Sources: AFII, LEEM, PREDA

PARIS REGION STRENGTHS

By choosing Paris Region as a location you can be sure of **finding all the partners you need**: subcontractors, pharmaceutical dispatchers, medical reps. agencies, strategy, marketing, and industrial property consultants etc.

You will also be **close to the key decision-making authorities**: the French Ministry of Health, AFSSAPS (the French Health Products Safety Agency), etc.

Paris Region offers an array of **different services and measures to support companies** locating to the region, as well as specialist venture capital companies offering a variety of strategies for accessing financing.



Chambre de commerce
et d'industrie de Paris

INTERNATIONAL DIVISION

1. French pharmaceutical industry

1.1. French pharmaceutical market

1.2. Life sciences clusters

2. Focus on the Paris Region

2.1. The Paris Region "Biocluster"

2.2. Paris Region strengths

2.3. Business facilities

3. Indo-French relations

3.1. Commercial relationship

3.2. CAFI, Indo-French Business Club

3.3. Indian success stories in France

Sources: AFII, LEEM, PREDA

BUSINESS FACILITIES

➤ Pre-Creation Incubators

Incubators are special support structures that provide welcoming locations for the first offices of newly created companies. Some of them are specialized in the Life Sciences:

- *Paris Biotech Santé* located at the René Descartes Medical School (at Cochin hospital)
- *Pasteur Biotop* located at the Pasteur Institute
- *Genopole* located in Evry.

➤ Sciences and technology campus

They are especially welcoming locations for innovative companies. Several of them are dedicated to the Life Sciences:

- *PARIS BIOPARK*
- *GENOPOLE*
- *ONCOLOGY CLUSTER.*



Chambre de commerce
et d'industrie de Paris

INTERNATIONAL DIVISION

COMMERCIAL RELATIONSHIP BETWEEN FRANCE AND INDIA : 2008 FIGURES

1. French pharmaceutical industry

1.1. French pharmaceutical market

1.2. Life sciences clusters

2. Focus on the Paris Region

2.1. The Paris Region "Biocluster"

2.2. Paris Region strengths

2.3. Business facilities

3. Indo-French relations

3.1. Commercial relationship

3.2. CAFI, Indo-French Business Club

3.3. Indian success stories in France

Sources: AFII, LEEM, PREDA

➤ A trade balance in favour of India:

Bilateral relation France/India	2007	2008
IMPORTATION (Mds €)	2.8	3.5
EXPORTATIONS (Mds €)	3.4	3.3

- Trade balance : -100 Millions €
- Import of goods from India to France increased of 23% from 2007 to 2008

INTERNATIONAL DIVISION

1. French pharmaceutical industry

1.1. French pharmaceutical market

1.2. Life sciences clusters

2. Focus on the Paris Region

2.1. The Paris Region "Biocluster"

2.2. Paris Region strengths

2.3. Business facilities

3. Indo-French relations

3.1. Commercial relationship

3.2. **CAFI, Indo-French Business Club**

3.3. Indian success stories in France

Sources: AFII, LEEM, PREDA

CAFI : THE INDO-FRENCH BUSINESS CLUB

➤ **Objective:**

Information Centre to help French firms to develop their business on the Indian market.

➤ **Mission:**

Promotion of networks, contacts, exchanges of information in order to generate business for its members. .

➤ **Means of action**

- ▭ Personalized working meetings.
- ▭ Conferences and debates.
- ▭ Meeting with Indian decision-makers.
- ▭ Contacts between members and potential partners.
- ▭ Newsletters.
- ▭ Intranet to develop "Networking".

INTERNATIONAL DIVISION

INDIAN SUCCESS STORIES IN FRANCE

1. French pharmaceutical industry

1.1. French pharmaceutical market

1.2. Life sciences clusters

2. Focus on the Paris Region

2.1. The Paris Region "Biocluster"

2.2. Paris Region strengths

2.3. Business facilities

3. Indo-French relations

3.1. Commercial relationship

3.2. CAFI, Indo-French Business Club

3.3. Indian success stories in France

Sources: AFII, LEEM, PREDA

➤ Zydus Cadila



➤ Ranbaxy



Chambre de commerce
et d'industrie de Paris

Thank you for your attention!

To contact the offices of Paris Chamber of Commerce

➤ **in India:** CCIP India

Mrs Agnès FRITSCH

afritsch@ccip.co.in

➤ **in Paris:** CCIP- DIACI – Zone Asie

Mr Roger BACRI

rbacri@ccip.fr

Mrs Olivia CALVET-SOUBIRAN

ocalvetsoubiran@ccip.fr

More information:

www.international.ccip.fr

and

www.ccip.fr

