

# **New International Healthcare Policies in Making Perspective from India**



**by**  
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**13 June 2019**

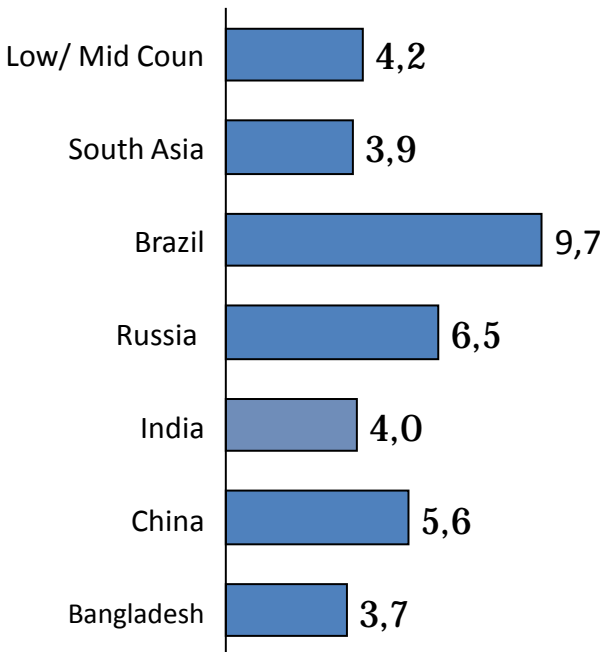
# India Profile

<b>Population</b>	<b>1.35 bn</b>
Population Growth Rate	1.11%
Life Expectancy (Male)	67.6 years
Life Expectancy ( Female)	70.1 years
Literacy	79%
GDP ( at current prices)	USD\$ 2,603 bn
Real GDP growth	7.2%
GDP in PPP ( 3 <sup>rd</sup> largest)	US\$ 10,340 bn
Per capita income (nominal)	US\$ 1,928
Exports	US\$ 303 bn
Imports	US\$460 bn
States	28
Languages/Dialects	

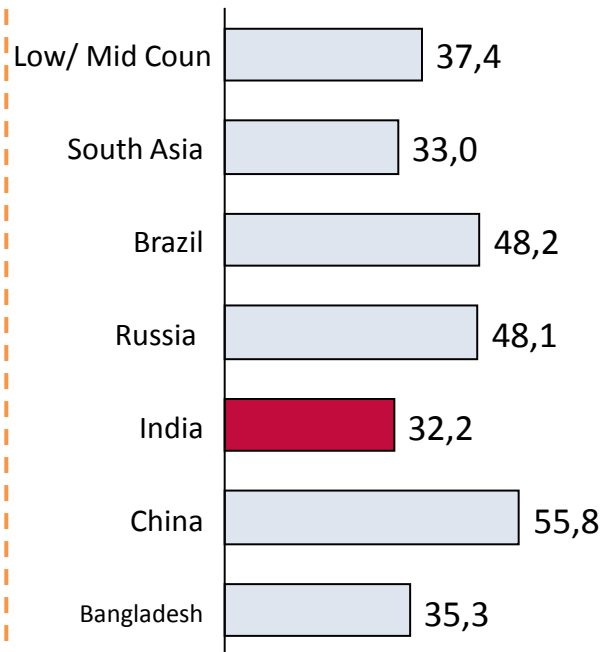


# Low Healthcare Expenditure: Limits Access

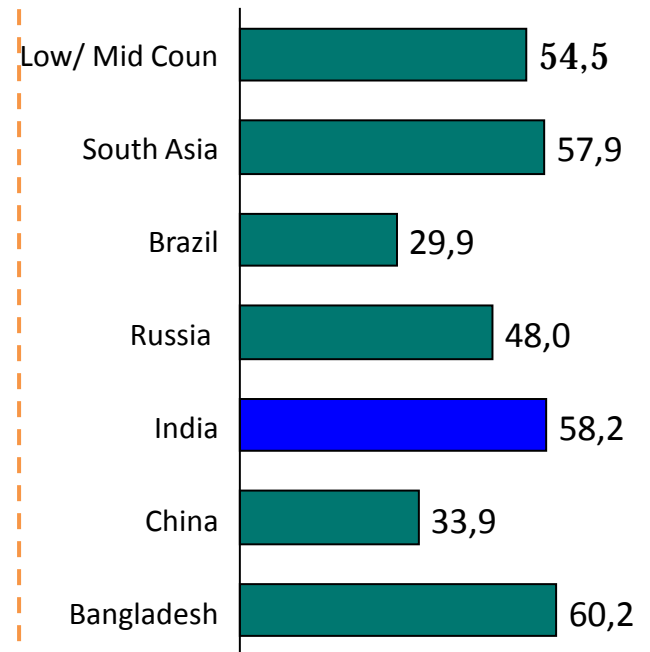
2013 Health Expenditure as % of GDP



Public Health Expenditures % of Total



Out-of-Pocket Health Expenditures % of Private

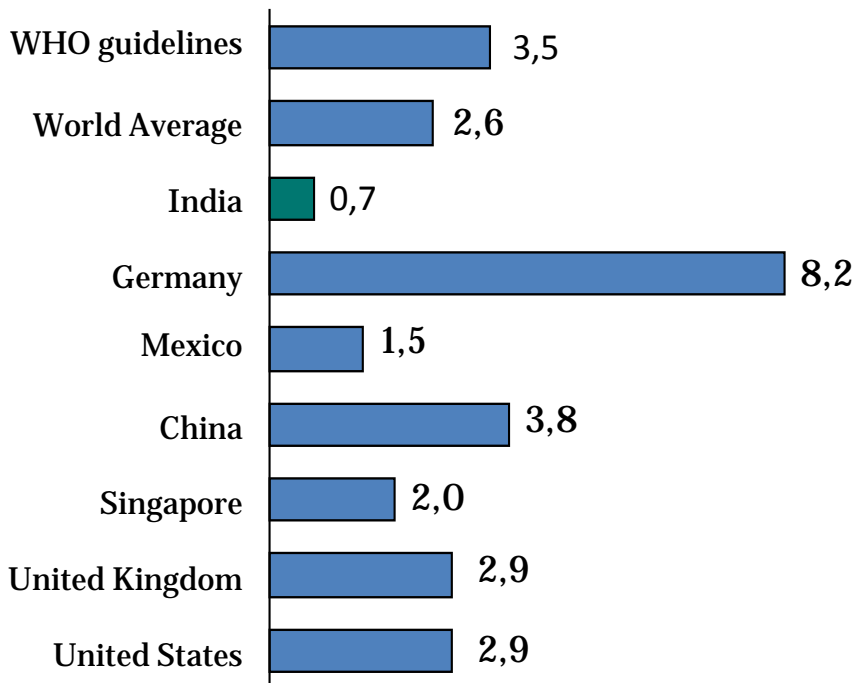


# Access to Healthcare in India is a Challenge

## Bed Density

Bed Density in India is well below WHO guidelines

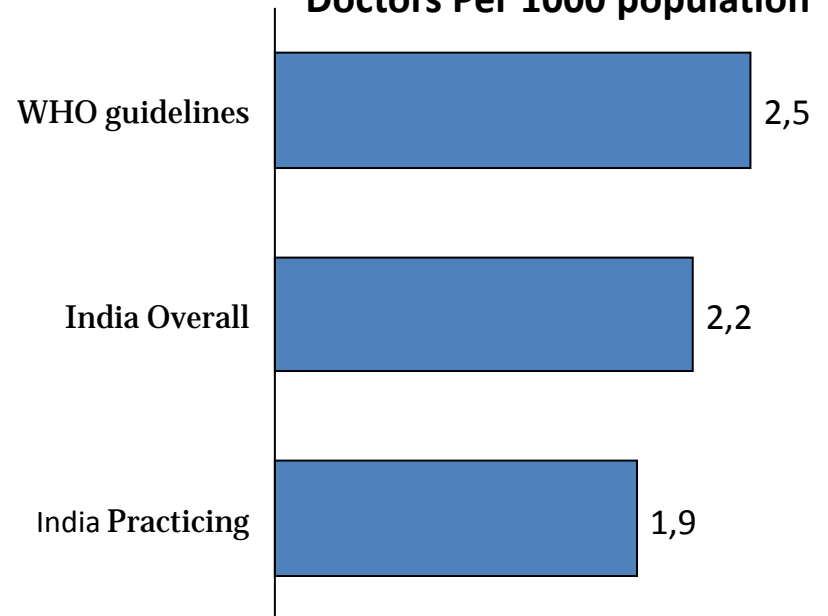
### Bed Density Per 1000 people



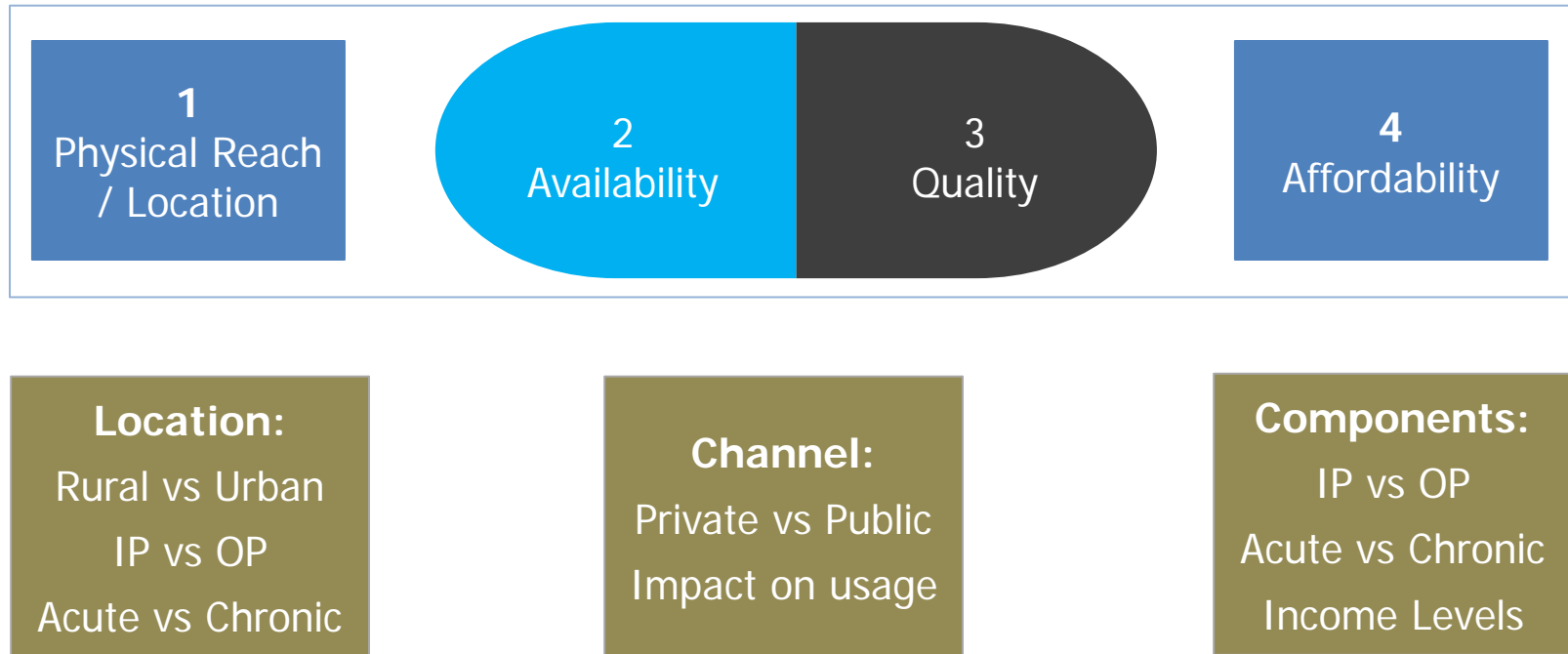
## Healthcare Professionals

Health workforce remains inadequate & under utilized

### Doctors Per 1000 population



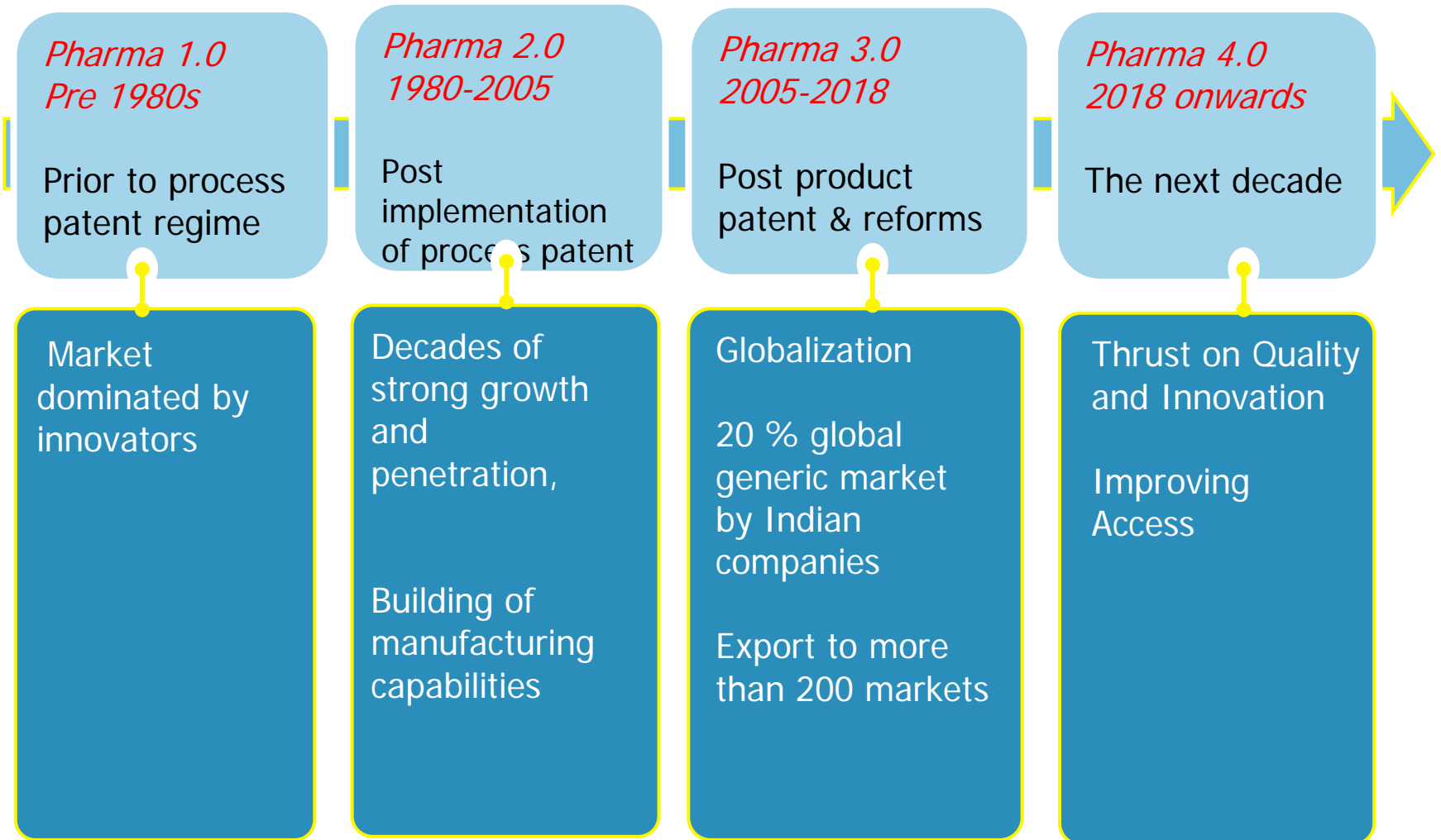
# Healthcare Access Needs to be Viewed in a Holistic Manner



- IMS access study captures 15,000 households across the income group population in 12 states, 36 districts, 12 metros, 64 urban towns and villages
- Data collected on more than 30,000 illness episode

*Source of access dimension: IMS access study 2013*

# Evolution of Pharma Sector – Pharma 4.0



# Access of Medicines: Pricing Policy

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- Drug Price Control Order, 2013: Movement to market-based pricing policy from cost based policy
- 376 drugs under National Essential List of Medicines accounting for 25% of pharma market
  - Drugs selected through consultative process with medical professionals across country
  - Average price taken of all brands with more than 1% market share
- Price increase in line with inflation for price controlled products and 10% on non price controlled products
- Government can exercise price control in other categories depending on national interest
  - Capping on trade margin on oncology products
- 95% is branded generic and self pay market
  - Low penetration of biosimilars and patented products

# Access of Medicine: Public Procurement Initiative

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## Janaushadhi Yojana (PMBJP)

- Objective to make available quality generic medicines at affordable prices
- Covers more than 800 medicines and 154 surgicals & consumables in all major therapeutic categories; pricing is 1/4<sup>th</sup> of branded generics
- 4,400 retail stores in 35 States/Union Territories of the country with sales of US\$50 million
- Limited response on account of store locations and overall management

Source: <http://pharmaceuticals.gov.in/schemes/pradhan-mantri-bhartiya-janaushadhi-pariyojana-pmbjp>



# Universal Health Coverage

## Pradhan Mantri Aarogya Yojana (PMJAY)

- Hospitalization for secondary and tertiary care
- Provide a cover of US\$ 7000 per family per annum to 100mn family 500mn people
- Sustainable Development Goal 3 (“good health and well-being”)

## Comprehensive Primary Health Care

- 65% government budget proposed for primary health care
- 150,000 Health and Wellness Centers
- Screening & early detection of NCDs
- Monthly dispensing of drugs
- Point of care diagnostics

# Way Forward

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- India is a highly competitive and self pay market
- Strengthening healthcare infrastructure fundamental for improving access
- Government policy and digital technology will play important role in improving access and is a key agenda for new government

# THANK YOU

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