



HLL Lifecare Limited

Innovating for Healthy Generations

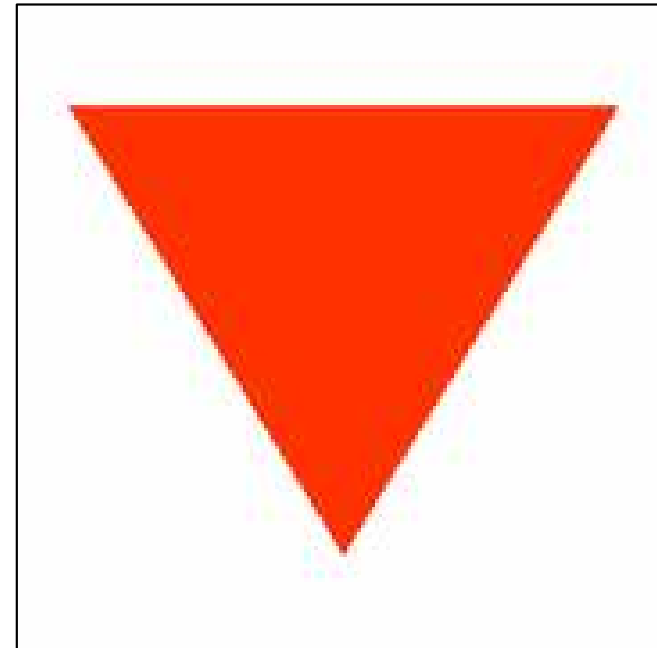


Inception

Incorporated in 1966

Under the administrative control of
Ministry of Health & Family
Welfare, GOI

Mandated to supply quality condoms
to the family welfare programme

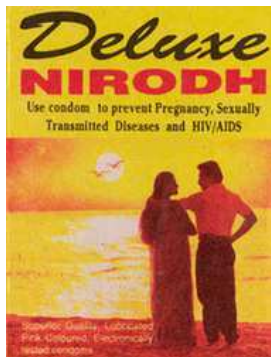


**The Red Triangle indicates family
planning products and services**



Growth

Focused on
Condoms till
1980



To other
contraceptives
by late 80's



Into Medical
Devices by
1990's



Biopharma
in 2008



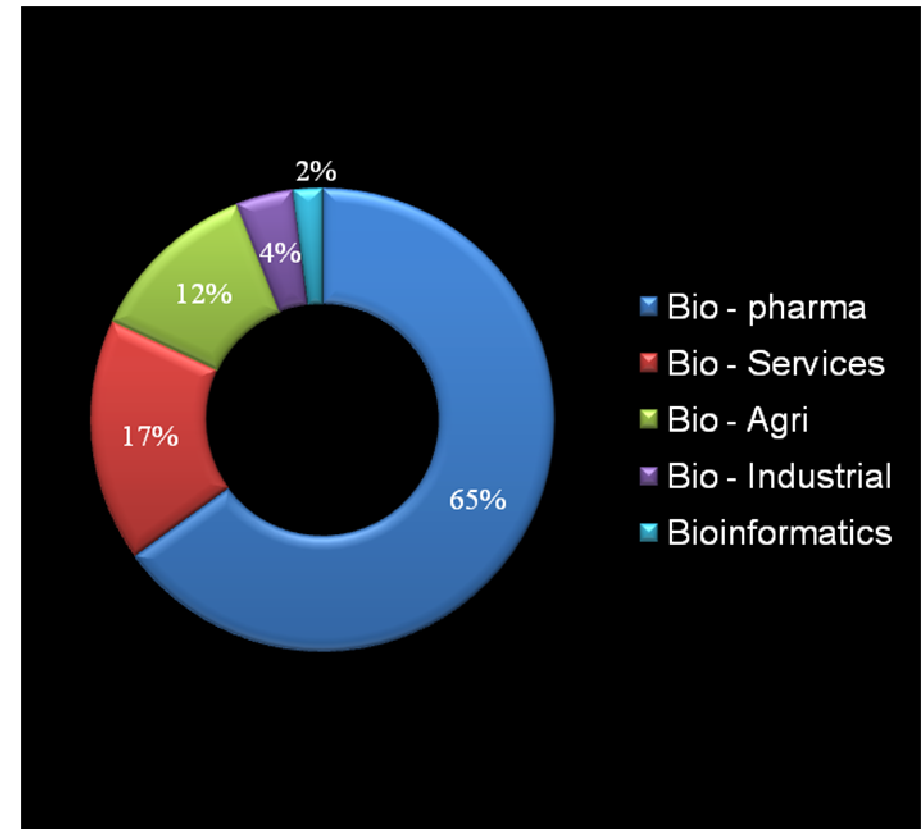


Indian Biotech Industry

Indian biotech industry contributed 2% of global biotech market in 2008.

The industry clocked US\$2.67 bn in 2008-09 registering a growth of 18% over the previous fiscal.

Indian Biotechnology market expected to touch USD \$25 bn by 2015.



Biotech Industry Market Distribution

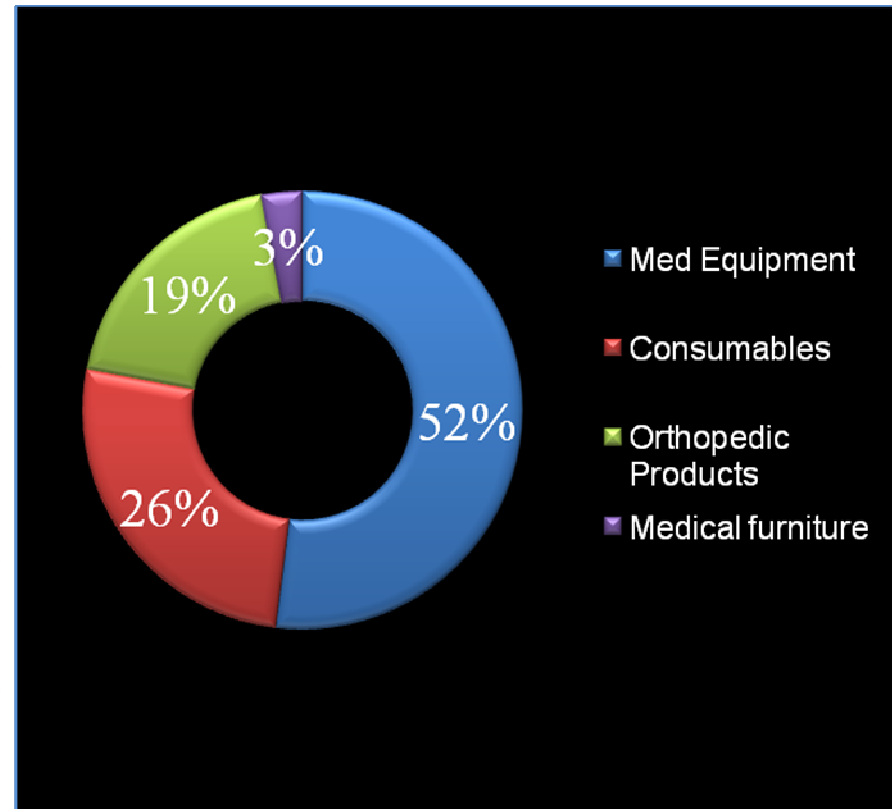


Indian Medical Device Industry

Indian medical devices market valued at USD 2.7 bn in 2008.

Market forecasted to grow at 12% per annum and to touch US\$ 6.0 bn by 2015

Recession proof as demand not tied to consumer discretionary spending.



Medical Devices Industry Market Distribution



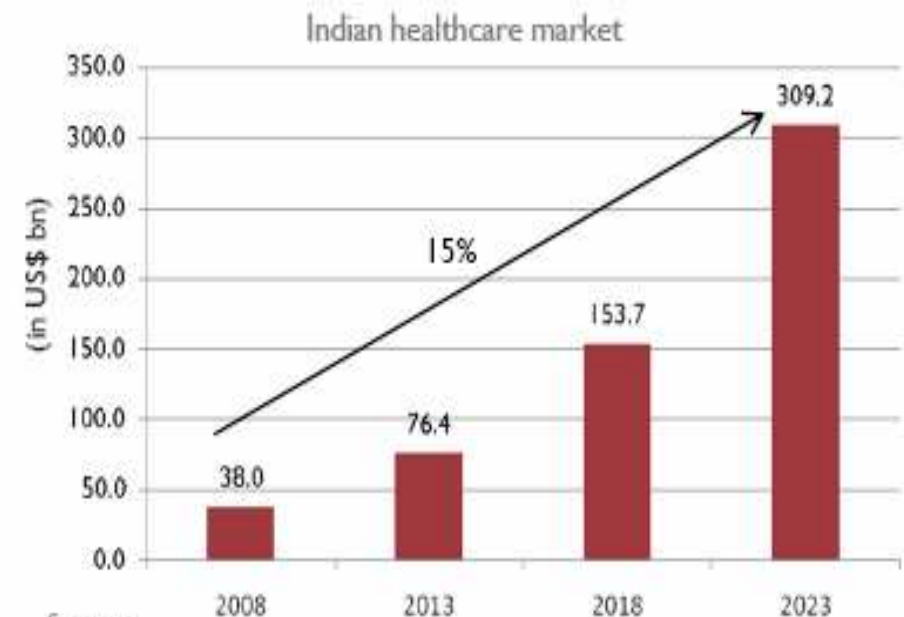
Industry Growth Drivers

GDP to touch double digit growth leading to affluent consumers driving demand

Policy initiatives for the biotech sector such as IP protection & confidentiality

Enhanced health insurance cover leading to a wider consumer base

Contract manufacturing as Indian device industry geared to US & EU quality requirements



Sources:

1: Ten industry trends 2009, Technopak healthcare outlook, 2009, p. 1

2: *Fostering quality healthcare for all*, Ernst & Young, 2008

3: Ministry of External Affairs



HLLs Medical Devices



1992 : Copper- T



1994 : Hydrocephalus Shunts.



1995 : HL-Haemopack Blood
transfusion Bags.



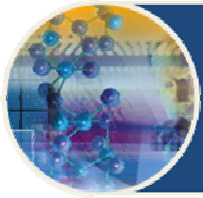
2003 : Surgical Sutures &
Tissue Expanders



2005 : Tubal Rings



Medical Devices Plant, Thiruvananthapuram



HLL's Life sciences Foray

Molecular Diagnostic Kits

- HLL – RGCB technology incubation centre.
- Objective is to develop kits for infectious disease diagnosis.
- Chickengunea and Dengue kits development by HLL based on duplex PCR method developed by RGCB





Vaccines

Integrated Vaccine Complex

- MoHFW mandated HLL to set up IVC
- HLL scouting for technology tie ups for :
 - Pentavalent formulation (DPT + Hib + Hep B)
 - JE , Measles , Anti rabies, Hep B & Hib Bulk production



Areas for Collaboration



Contract Manufacturing

Polymer Processing

- Injection moulding
- Extrusion moulding
- Rotational moulding

Pharmacy operation

HF welding assembly

Injection Molding





Contract Manufacturing

Clean Rooms

- Class 100,000
- Class 10,000
- Class 100 work stations

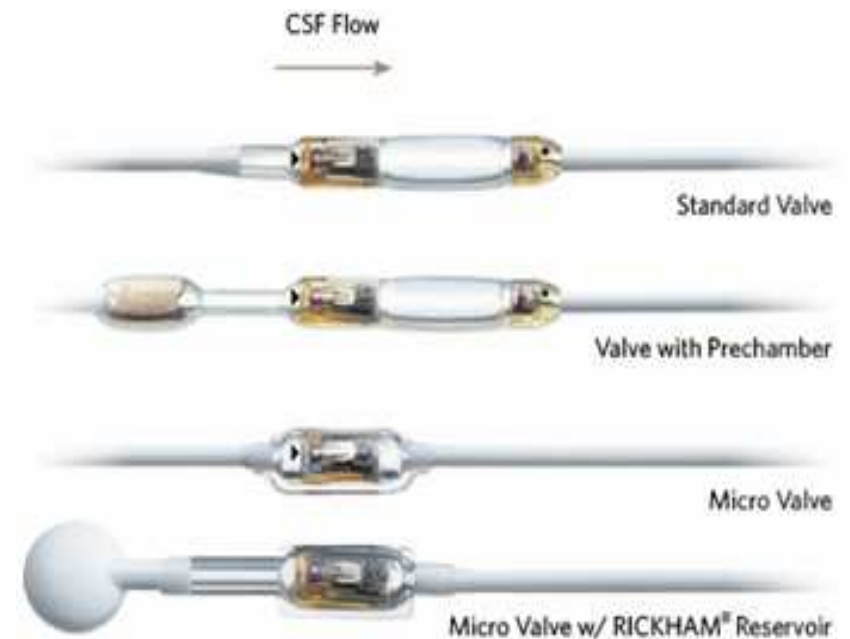
CLASS – 10000 CLEAN ROOM





Case – Contract Manufacturing

Contract manufacturing of hydrocephalus shunt for Codman – a J&J company





Vaccine technology

Formulation technology for pentavalent combination vaccine

Bulk & formulation technology for :

- Measles
- JE
- Hep B
- Hib
- Anti Rabies