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INDIA BIOTECH HANDBOOK 2025







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Acknowledgements

India Biotech Handbook has been envisioned and published by **Narayanan Suresh**, Chief Operating Officer, Association of Biotechnology Led Enterprises (ABLE). Co-ordinated and carried out by **Ms Pavana Praveen**, Manager-BDO & **Ms Indrila Sengupta**, Asst. Manager-BDO. Designed and printed by **Sareeta Sajjan**. Dr **Balasubramanya S.**, General Manager is the Chief Coordinator for the INDIA Pavilion@BIO Boston, June 16-19, 2025.

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From ABLE President's Desk

G S Krishnan

Hon. President - ABLE

Greetings from ABLE!

A warm welcome to all the participants from the biotech fraternity in India. I am happy to present to you the snapshots of the best of India's globally acclaimed biotech industry. The products and services from India's 600+ biotech companies and 10,000+ startups have contributed a significant 4.25% to the nation's \$4 trillion Economy that has now emerged as the world's largest economy nudging past Japan.

India's biotech talent is on display yet again at the "**India Pavilion**", organized every year by ABLE along with DBT/BIRAC at the annual "**US BIO Convention**". Top 28 biotech companies, innovative startups, some of India's best bio incubators and states that provide immense support to the biotech ecosystem participate.

India Pavilion is not just a showcase of the country's biotech talent, this time at "**BIO Boston**", it is also at the core of spreading the message to the global community that the country's Innovative talent is here, taking up any challenge to solve some of the humanity's urgent needs. The world needs our support as we try to feed, fuel and heal the billions of people.

ABLE has organized a series of activities centred around the BIO Convention. An **Indian**

Startups Delegation, organized by ABLE, will undertake a high-impact exploration program at Boston, New York and New Jersey life science and healthcare innovation hubs to explore cross-border innovation and investment opportunities. A special **Interaction Meeting with the Indian Student Diaspora** is organized jointly by **ABLE, Nucleate and the Harvard Biotech Club** at the **Harvard Medical School campus**, a valuable platform to connect with the next generation of biotech innovators.

The industry delegation will be visiting one of Boston's acclaimed **Biofoundry setup by Manusk Bio** to get firsthand knowledge to replicate this success story as the country embarks to implement the BioE3 Policy, that aims to put India on a global BioManufacturing leadership path. ABLE will also be contributing significantly to the discussions organized by the International Council of Biotech Associations (ICBA) on how to strengthen the biotech global supply chains to prepare for the next pandemic. Indian delegation will also be interacting with the biotech influencers and industry leaders at a select gathering in Boston during the event.

I look forward to an action-packed India Pavilion and the carefully curated activities to provide the world some glimpses into to India's innovative biotech ecosystem. On behalf of ABLE, I welcome you all to show the best we have in biotech.



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Overall Size & Structure

BIOECONOMY 2024

India's BioEconomy has witnessed a phenomenal rise over the past decade, transforming from a fledgling sector to a powerhouse contributing significantly to the nation's economic growth. In 2003, India's bioeconomy stood at a modest **\$2 billion**. The initial phase witnessed steady growth, reaching **\$5 billion** by **2008**, with the bioeconomy tripling to **\$11 billion** by **2013**. This period marked the beginning of a remarkable upsurge.

From 2013 to 2018, the bioeconomy experienced an exponential surge, reaching a staggering **\$55 billion** – a phenomenal **400%** growth. The momentum continued between 2018 and 2024, with the bioeconomy reaching a colossal **\$165.7 billion**.

The state governments are setting targets as a factor of national BioEconomy Values and as part of the Gross State Domestic Product (GSDP) considerations. More about such examples will be shared in subsequent sections.



BIOECONOMY
VALUE
\$165.7 BN



STARTUPS
10,075



GDP

\$3.89 TRILLION



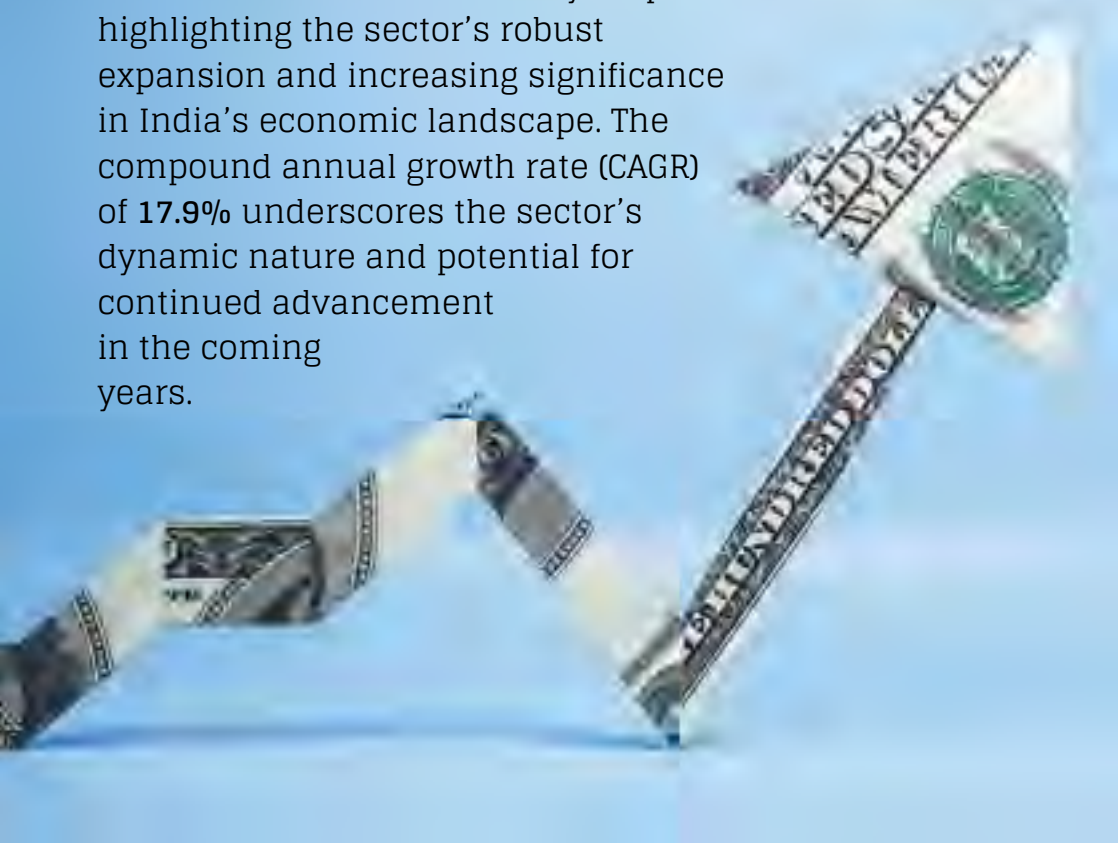
CONTRIBUTION
TO NOMINAL GDP

4.3%



India's BioEconomy Nearly Doubles Over Five Years

India's BioEconomy has showed remarkable growth over the past five years, expanding from **\$86 billion** in 2020 to **\$165.7 billion** in 2024. This represents a **92.7%** increase over the five-year period, highlighting the sector's robust expansion and increasing significance in India's economic landscape. The compound annual growth rate (CAGR) of **17.9%** underscores the sector's dynamic nature and potential for continued advancement in the coming years.



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Four key segments contribute to the India BioEconomy

BIOINDUSTRIAL: The BioIndustrial sector in India is a significant contributor to the country's BioEconomy. This sector leverages biotechnology to produce a wide range of products using enzymes and microbes which are essential biocatalysts that speed up biochemical reactions. Multiple industries, including Textiles, Alcoholic Beverages, Detergents, Paper & Pulp, Leather, Aquaculture and Poultry, Baking, Starches, and Vegetable Oil, use enzymes in key processes that are now intrinsic to the end products from these sectors. The applications highlight the versatility and importance of enzymes and microbes in the BioIndustrial sector, contributing to sustainable and efficient production processes across various industries.

BIOPHARMA: The BioPharma sector is another major driver of India's BioEconomy, encompassing the development and production of pharmaceuticals, vaccines, diagnostics, and medical devices. It has been a leading segment, with diagnostics and therapeutics playing crucial roles. The sector benefits from India's strong gener-

ics market and growing capabilities in biologics and personalized medicine.

BIOIT/RESEARCH SERVICES/BIOSERVICES: This segment includes contract research organizations (CROs), contract development and manufacturing organizations (CDMOs), and BioIT services. It supports the broader BioEconomy by providing essential research and development services, leveraging India's IT capabilities to enhance biotech innovation and efficiency.

BIOAGRI: The BioAgri sector focuses on genetically modified crops, precision agriculture technologies, and bio-based products. It includes notable contributions from Bt Cotton, biopesticides, biofertilisers and bio-stimulant. This sector plays a vital role in enhancing food security and sustainability in India's agricultural landscape.

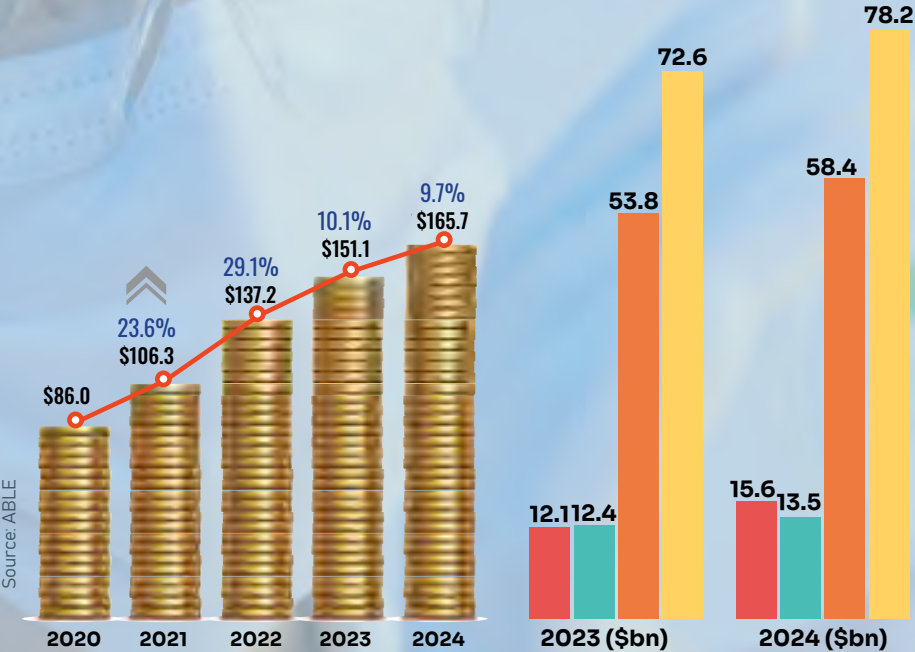
These segments collectively contribute to the robust growth and diversification of India's BioEconomy, each playing a unique role in driving innovation and economic development.

Segment Performance (2023-2024)

Segment	2023	2024	Growth	Growth (%)
BioIndustrial	72.6	78.2	5.6	7.7%
BioPharma	53.8	58.4	4.6	8.6%
BioAgri	12.4	13.5	1.1	8.9%
BioIT/Research Services/ BioServices	12.1	15.6	3.5	28.9%
Total	151.1	165.7	14.6	9.7%

All figures in \$bn

Source: ABLE



Overall BioEconomy Growth Trajectory

*Totals may not sum to 100% due to rounding to the nearest decimal

All figures in \$bn



BIOINDUSTRIAL SECTOR

As the largest component of India's BioEconomy, the BioIndustrial sector accounts for **47.2%** of the total BioEconomy value in 2024. With a value of **\$78.2 billion**, this segment has grown by **7.7%** from 2023 to 2024. While its growth rate is slightly below the average for the overall BioEconomy, its substantial size means it contributed **47.2%** of the total BioEconomy in absolute terms (Or **\$5.6 billion** of the total **\$14.6 billion** increase in value). The dominance of this sector reflects India's strong industrial biotechnology foundation, including biofuels, bio-based chemicals, enzymes, and industrial bioprocesses. The moderate but steady growth rate suggests a maturing sector with established applications and technologies.



BIOPHARMA SECTOR

The BioPharma sector is the second-largest contributor to India's BioEconomy, accounting for **35.2%** of the total value in 2024. At **\$58.4 billion**, this segment has grown by **8.6%** (which is **4.6 bn**, accounting for **31.5%** share of the growth) from 2023, accounting for **31.5%** of the overall growth of the BioEconomy.

The substantial share of the BioPharma sector highlights India's position as a significant global player in pharmaceuticals, vaccines, and therapeutic biologics. The sector's growth rate, slightly below the overall average, may reflect the impact of post-pandemic normalization in healthcare spending.



BIOIT/RESEARCH SERVICES/ BIOSERVICES

Although representing a smaller portion of the BioEconomy at **9.4%** (**\$15.6 billion**), the BioIT/Research Services/BioServices sector demonstrated the highest growth rate of all segments at **28.9%** between 2023 and 2024. This exceptional growth contributed **24.0%** to the overall BioEconomy expansion, despite the sector's relatively smaller size.

This impressive performance indicates a rapid expansion in bioinformatics, computational biology, contract research services, and other biotechnology support services. The sector's accelerated growth suggests increasing digitalization in biotechnology and growing demand for specialized biotechnology services and research capabilities.



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Project Monitoring & Control

Goods inspection, schedule and cost monitoring & control



BIOAGRI SECTOR

The BioAgri sector accounts for **8.1%** of India's BioEconomy in 2024, valued at **\$13.5 billion**. The sector grew by **8.9%** from 2023 to 2024. It contributed **8.1%** to the total growth of the BioEconomy.

The performance of this sector reflects ongoing innovations in agricultural biotechnology, including biofertilizers, biopesticides, genetically modified crops and molecular breeding techniques. The growth rate suggests steady adoption of biotechnological solutions in agriculture, which remains a critical sector for India's economy.



India's BioEconomy has demonstrated remarkable resilience and growth, nearly doubling in size from **2020 to 2024**. The sector's expansion has been driven primarily by the BioIndustrial and BioPharma segments, which together account for almost **82.4%** of the total Bioeconomy value.

The standout performer in terms of growth rate is the BioIT/Research Services/ BioServices sector which grew by **28.9%** between 2023 and 2024, indicating a significant shift

towards digitalization and specialized services in biotechnology.

The continued expansion of India's BioEconomy, even as growth rates moderate, suggests a maturing sector that is becoming increasingly integrated into the broader economy. With a CAGR of **17.9%** over the past five years, the BioEconomy represents one of the most dynamic sectors in India's economic landscape, with significant potential for continued innovation and growth in the coming years.

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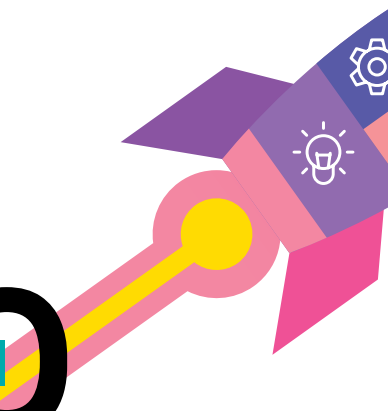


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India's Biotech Startup Ecosystem Surpasses

10,000

Milestone in 2024



India's biotech startup sector continues its rapid ascent, with the last three years showcasing exponential growth. Between 2021 and 2024, the cumulative number of biotech startups surged from 5,365 to 10,075—a **88% increase**. This rise reflects a consistent upward trajectory since 2016, with a noticeable surge post-2020.

The biotechnology and life sciences sector added **1,390** startups in **2021**, followed by **1,776** in **2023**, and **1,554** in **2024**. This expansion is driven by increased investments, favorable policy shifts, and rising demand

for biotech innovations in healthcare and sustainability. The moving average trend line further highlights this consistent growth. BIRAC's entrepreneurship development and strategy support programs have played a pivotal role.

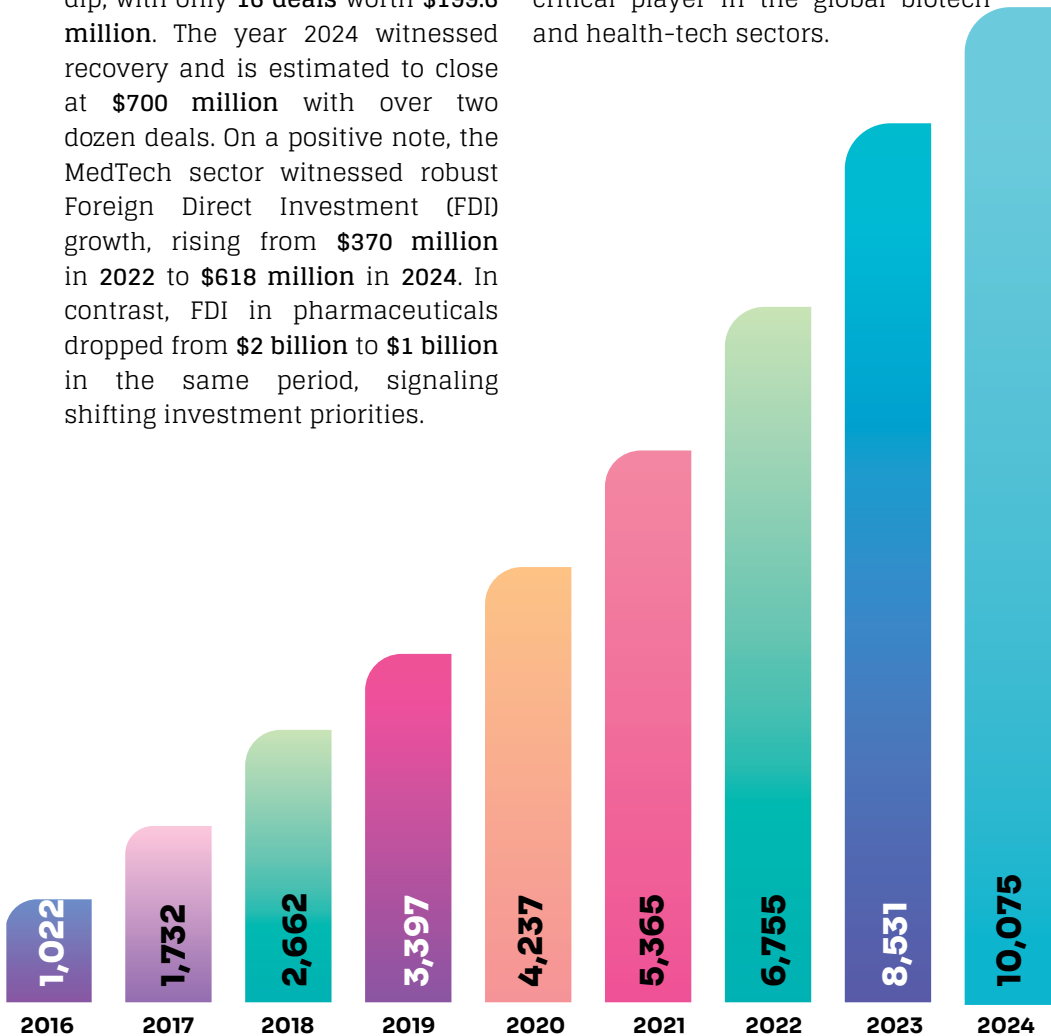
The COVID-19 pandemic acted as a catalyst, turning attention to biopharma, health-tech, and diagnostics. Investors increasingly recognized biotech as a high-impact sector. Government initiatives and global partnerships have also played pivotal roles in sustaining this momentum.



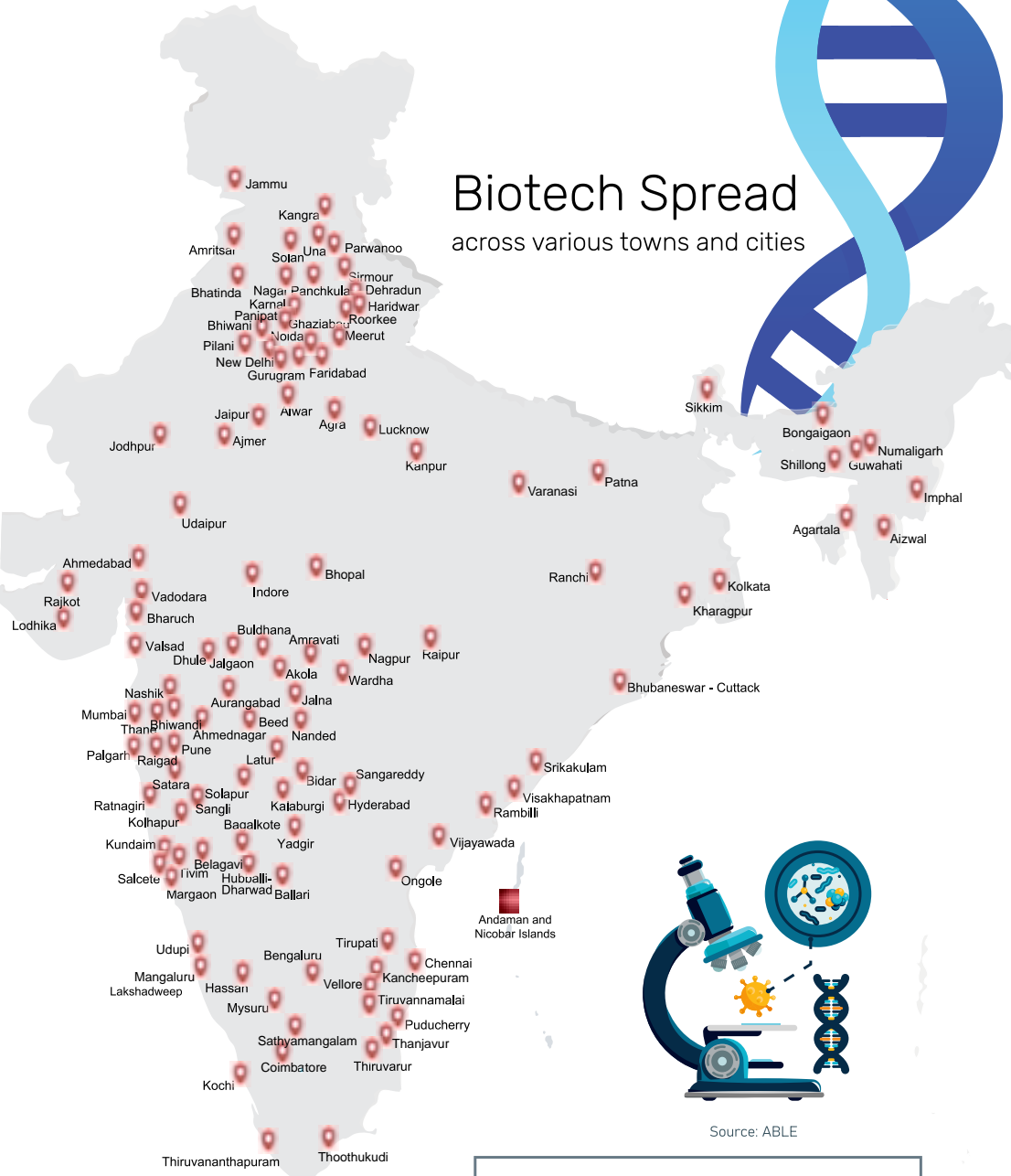
Indian startups have developed over **800 products** and raised more than **\$600 million** in follow-on funding.

However, while 2022 saw **31 deals** totaling **\$938.8 million**, 2023 saw a dip, with only **16 deals** worth **\$199.6 million**. The year 2024 witnessed recovery and is estimated to close at **\$700 million** with over two dozen deals. On a positive note, the MedTech sector witnessed robust Foreign Direct Investment (FDI) growth, rising from **\$370 million** in 2022 to **\$618 million** in 2024. In contrast, FDI in pharmaceuticals dropped from **\$2 billion** to **\$1 billion** in the same period, signaling shifting investment priorities.

Despite these fluctuations, the biotech ecosystem remains vibrant, fueled by domestic innovation and strategic global collaborations. The rising startup activity and increased FDI in MedTech position India as a critical player in the global biotech and health-tech sectors.



Biotech Spread across various towns and cities



Source: ABLE

Places having presence of either Biotech companies, Biotech startups, Biorefineries, Bioincubators, Bioresearch centers, Bioprocessing centers, BioMedical manufacturers or BioAgri zones.

PROPRIETARY NOVEL DRUGS

FACT SHEET



Locations

Yardley, PA, USA ;
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Website

www.jubilanttx.com

CORPORATE OVERVIEW

A clinical-stage precision therapeutics company advancing potent and selective small molecule medicines with enhanced therapeutic index to address unmet medical needs in oncology and autoimmune diseases

HIGHLIGHTS



Differentiated pipeline

Pipeline of novel drugs, discovered in-house and fully owned, under clinical development are geared to provide potential oral medicines that are more efficacious and provide safer treatment alternatives for genetically mutated cancers in patients worldwide who develop resistance or do not respond to existing therapies available in the market.



Improved therapeutic efficiency

TIBEO (Therapeutic Index and Brain Exposure Optimization) discovery engine validated with proven track record of successful out- licensing partnerships and subsequent large M&A deals.



Positive signals

JBI-802: Standalone therapy achieved human proof of principle in certain cancer and showed in one lung cancer patient with specific genetic mutation who had exhausted other modes of treatment, a statistically significant tumor shrinkage, with nearly 2 years life-span extension and significantly better quality of life (still under observation). Combination therapy along with approved checkpoint inhibitors expected to produce better outcomes.

PIPELINE OF NOVEL THERAPIES

Program	Indications	Preclinical	Phase I/II
JBI-802	<i>ET/MPN</i> <i>Specific Mutations IO Resistance NSCLC - A genetically defined subset of lung cancer that is resistant to immunotherapy</i> <i>Post MPN AML - A rare type of leukemia</i>	<div><div></div></div>	<div><div></div></div>
JBI-778	NSCLC with EGFR mutation, mIDH high grade glioma and ACC Genetically defined subset of lung cancer, brain tumor and head and neck cancer	<div><div></div></div>	<div><div></div></div>
PAD4	Autoimmune Diseases and Cancer - Novel first-in-class therapeutics with no immune suppression	<div><div></div></div>	<div><div></div></div>

* Pipeline includes preclinical programs: PAD4 inhibitor for autoimmune diseases such as Rheumatoid Arthritis and PDL1 Inhibitor for cancer

Contribution of Key States

In 2024, Maharashtra leads India's BioEconomy with a value of \$35.45 billion, representing 21.4% of the total BioEconomy value of \$165.7 billion. Karnataka follows closely with \$32.37 billion (19.5%), while Telangana contributes \$19.9 billion (12%). Gujarat adds \$12.9 billion (7.8%), Uttar Pradesh contributes \$11.3 billion (6.8%), Andhra Pradesh \$11.1 billion (6.7%), and Tamil Nadu \$9.9 billion (6%) respectively. The "Others" category, which includes various smaller states, totals \$32.75 billion, accounting for 19.8% of the BioEconomy value. This distribution underscores the regional strengths within India's rapidly growing biotechnology sector, poised for significant expansion in the coming years.

Maharashtra \$35.45 bn

Karnataka \$32.4 bn

Telangana \$19.9 bn

Gujarat \$12.9 bn

Uttar Pradesh \$11.3 bn

Andhra Pradesh \$11.1 bn

Tamil Nadu \$9.9 bn

Others \$32.75 bn



Maharashtra
21.4%



Karnataka
19.5%



Telangana
12%



Gujarat
7.8%



Uttar Pradesh
6.8%



Andhra Pradesh
6.7%



Tamil Nadu
6%

Others
19.8%

Total
BioEconomy Value
\$165.7 bn

Regional Analysis of the BioEconomy Distribution

India's BioEconomy landscape, valued at approximately **\$165.7 billion**, exhibits distinct regional patterns that reflect historical investments, policy priorities, and natural resource advantages. These four major regions—South, West, North, and East—house India's BioEconomy activities; each region possesses a unique sectoral composition that defines its market.

The Bioeconomy's four key sectors—BioIndustrial, BioPharma, BioServices, and BioAgri—show significant

variation in regional concentration, revealing specialized ecosystems that have grown through a combination of deliberate strategic focus and organic development. The South leads in business, having a diverse range of companies, while other regions concentrate on specific areas. The regional distributions provide critical insights for policymakers, investors, and industry leaders seeking to identify growth opportunities, address market gaps, and develop strategic partnerships across the bioeconomy landscape.



SOUTH REGION

(\$75.2 bn, 45.4% share)

- ✓ **Dominant player** in the BioEconomy market
- ✓ Strong leadership in **BioIndustrial (\$30.0 bn)** and **BioPharma (\$28.7 bn)**
- ✓ Exceptional performance in **BioServices (\$12.5 bn)**, controlling 80% of this sector
- ✓ Moderate presence in **BioAgri (\$4.0 bn)**
- ✓ Overall balanced portfolio across all segments

WEST REGION

(\$50.2 billion, 30.3% share)

- ✓ **Second largest** regional market
- ✓ Strong in **BioPharma (\$25.1 bn)** accounting for **43%** of this sector
- ✓ Significant presence in **BioIndustrial (\$14.2 bn)**
- ✓ Leading position in **BioAgri (\$8.2 bn)**, controlling **61%** of this sector
- ✓ Relatively weak in **BioServices (\$2.7 bn)**

NORTH REGION

(\$30.6 bn, 18.5% share)

- ✓ **Third largest** regional market
- ✓ Significant presence in **BioIndustrial (\$25.0 bn)**
- ✓ Modest presence in **BioPharma (\$4.1 bn)**
- ✓ Very limited activity in **BioAgri (\$1.2 bn)** & **BioServices (\$0.3 bn)**
- ✓ Overall portfolio heavily weighted towards BioIndustrial

EAST REGION

(\$9.7 bn, 5.8% share)

- ✓ **Smallest** regional player
- ✓ Primarily focused on **BioIndustrial (\$9.0 bn)**
- ✓ Minimal presence in other sectors
- ✓ Represents an emerging or under developed bioeconomy region



HIGHLIGHTS of BIO 2024



India Delegation@ #BIO2025



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Hon'ble Minister - Rural Development and Panchayat
Raj and Information Technology & Biotechnology
Government of Karnataka

Kiran Mazumdar-Shaw

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Executive Chairperson and Founder Of
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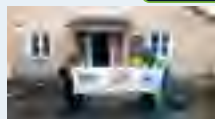
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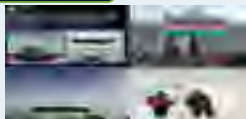
Research Labs / Areas



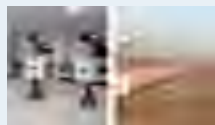
Success Stories



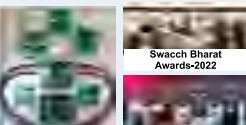
Artic (North pole) Himadri station 79°N



42nd Indian Scientific Expedition to Antarctica - Nov 2022



Runway Visual Ranging BVS for Donyi Polo Airport, Itanagar, Arunachal Pradesh



MEMS Biosensors for detecting homeopathy drug potency



Swachh Bharat Awards-2022

Bangalore Tech Summit-2022

Instruments / Facilities

SEM, XRD, HPLC, GC, BET, DSC, TGA, FTIR, 3D Printer, Fluorescence microscope, Stereo microscope, RT-PCR, Multimode reader, Fermenter, BSL-2, Gel Doc system, Protein purification system, Kjeldhal system, Live cell imaging scanner, Plant tissue culture, Green house and animal cell culture.

Funded Projects

International Funded Projects - Indo-Sweden, Indo-Belarus, Indo-Egypt, Indo-France, Indo-ASEAN and European Union.

National Funded Projects - DST, DBT, DRDO, DOS, UGC-DAE, MOES, DIC-KCTU, VGST, AYUSH and KSSRDI

CIIRC Supported Products

Fostering Solutions from Mother Nature



Bio-products developed from Crop residues and Biomass



Millet and Nutraceutical Enriched Health Drinks



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Association of Biotechnology Led Enterprises (ABLE)	973 & 1065
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Shilpa Biologicals Pvt. Ltd.	973-B01
Pharmaffiliates Analytics & Synthetics Pvt. Ltd.	973-D
Biocon Biologics Limited	1065-A01
Indian Immunologicals Ltd.	1065-A02
Biotechnology Industry Research Assistance Council (BIRAC)	1065-A03
Karnataka Innovation & Technology Society, Department of Electronics, IT & Bt, Government of Karnataka	1065-A04
CuraTeQ Biologics	1065-A05
Government of Tamil Nadu - Guidance & TICEL Bio Park Limited	1065-A06
IKP Knowledge Park	1065-B01
ICBio Clinical Research Pvt. Ltd.	1065-B02
BioAgile Therapeutics Pvt. Ltd.	1065-C01
Bio 360 Life Sciences Park	1065-C02
Khurana & Khurana, Advocates and IP Attorneys	1065-C03
Azooka Labs Pvt. Ltd.	1065-C04
WT Faba Biocatalyst LLP	1065-C05
SRM Institute of Science and Technology (SRMIST)	1065-C06

Vipragen Biosciences Pvt. Ltd.	1065-C07
PopVax Pvt. Ltd.	1065-C08
Clinixel Life Sciences Pvt. Ltd.	1065-C09
SynSmart Rasayan Research	1065-C10
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Bangalore Bioinnovation Centre (BBC)	1065-C13
Vinayaka Missions Research Foundation (VMRF)	1065-C14
Yashraj Biotechnology Limited	1065-C15
Provis Biolabs	1065-C16
Raptim Research Limited	1065
SPHAERA PHARMA	1065



June 10-18, 2025

Boston Convention & Exhibition Center

2025 Program

India Pavilion Inauguration

Booth 973 & 1065

June 16, 2025 | 12.30 Hrs

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Hon'ble Minister - Rural Development and
Panchayat Raj and Information Technology & Biotechnology
Government of Karnataka

Dr. Kiran Mazumdar-Shaw

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Indicative engagements

Strategy:

- Peptides market entry strategy for top 5 pharma companies
- Nutraceutical segment strategy & buy-side transaction advisory for Berkshire Hathaway company

M&A and Investor Advisory:

- Buy-side transaction advisory for listed pharma company in CRO & CDMO segment
- Segment strategy & buy-side for marquee PE fund with > \$4Bn AUM

Innovation and tech transfer:

- mAbs - global and regional licensing for listed Indian pharma company
- CNS portfolio out licensing for listed pharma company

ESG:

- Biotransformation strategy for fragrances and flavors company
- Sustainability impact of regional manufacturing in Africa

Clients & Partners



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for the Biotech Sector



Proposing Fiscal
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Biotech Sector



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IPR System



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Focus Initiatives



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Venture Capital
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through Investment



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SCIENTIFIC INFRASTRUCTURE

Key Facilities

- Pilot Scale-up Facility
- Cell Culture Facility
- Plant Tissue Culture Facility
- Clean Rooms (Class 7 & 8)
- Shared Labs
- 3KLD ETP dedicated for incubators

Prototyping Facilities

- Design Studio
- Fabrication Lab
- Electronics Workshop
- Mechanical Workshop
- Reverse Engineering Section
- connects with contract manufacturers

Key Equipments

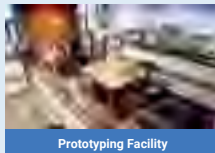
- Advanced microscopy systems
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- Bioreactors and pilot production
- 3D printers and 3D Bioprinters



Pilot Scale-up Facility



Clean Room



Prototyping Facility

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THRUST AREAS



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Nanotechnology
Nanomedicine, Enhances heritage preservation, biopolymer coating and biosensors.



Agriculture
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Bio-AI
Integrates AI in research, healthcare, and agriculture.



Cancer Research
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Health & Med-Tech
Non-invasive diagnostics, AI-driven monitoring, and wearable health tech.



CleanTech & Waste Management
Tackles environmental issues with wastewater treatment and biodegradable plastics.

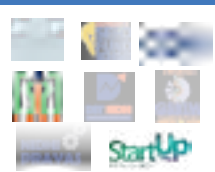


Engineering & Others
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FUNDING SCHEMES

Gujarat Industrial Policy (IMD, Govt):
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–Grant up to ₹20L + debt funding up to ₹50L.
BIRAC SEED Fund (DBT, Govt):
–Equity-based funding up to ₹30L.
NIDHI PRAYAS (DST, Govt):
–Grant up to ₹10L for idea-to-prototype.
NIDHI Seed Support Scheme (DST, Govt):
–Financial support up to ₹100L.
AtmaNirbhar Gujarat Fellowship :
–Supporting –young grads & professionals to build tech/products & become self-reliant.

PATRONS



IMPACT OF STBI

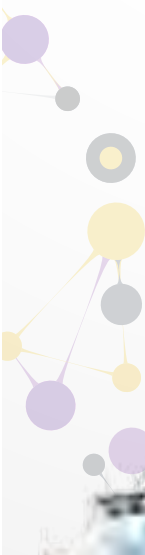
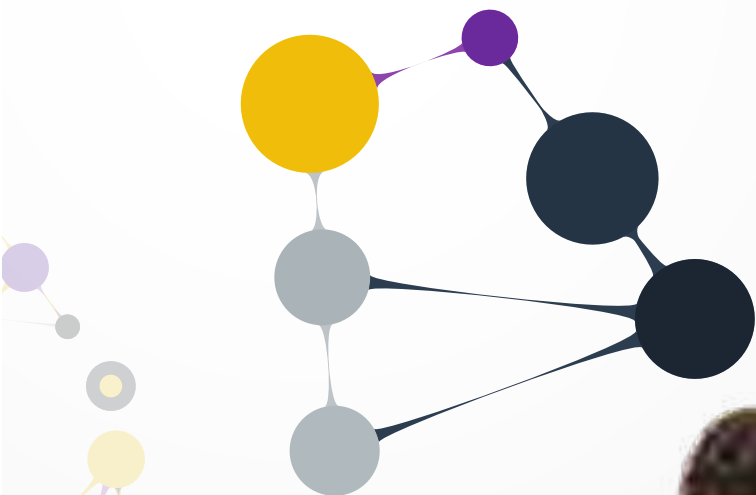
- STBI ranked among India's top 5 public bio-incubators (Biospectrum)
- Featured in the Indian BioEconomy report 2024
- Startups have a combined valuation of ₹300+ Cr
- Generated ₹150+ Cr in revenue
- 140+ products launched by 30+ ventures
- Facilitated ₹30+ Cr in external funding

CONTACT US



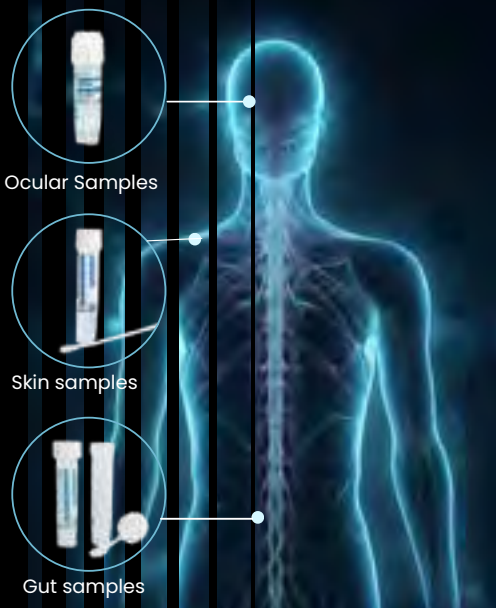


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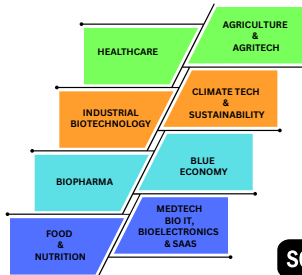
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or in development

120+ countries where our
biosimilars are available

9 biosimilars launched
across global markets

5+M patients served globally by
our biosimilars



www.bioconbiologicsus.com

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Biological E. Limited

Celebrating Life Every Day

SAFEGUARDING LIVES, TRANSFORMING HEALTH, AND SPREADING JOY

- ▶ A pioneer in vaccine & biopharmaceutical manufacturing since 1953
- ▶ End-to-end biologics expertise, including mAbs, backed by proven capabilities
- ▶ Full spectrum of CDMO services in both DS & DP across vaccines & biologics, and complex DP formulations.

EXPERTISE



PROCESS DEVELOPMENT



GMP & CLINICAL TRIAL MANUFACTURING



FORMULATION / FILL FINISH



PACKAGING & STORAGE



QUALITY CONTROL



PARTNERSHIP BRINGS
SUCCESS

REGULATORY APPROVAL



A Government of India Enterprise, Under Department of Biotechnology
Ministry of Science & Technology, Government of India

BIRAC : Enabling Growth of Indian BioEconomy

Biotechnology Industry Research Assistance Council (BIRAC) is a not for profit, Public Sector Enterprise, set up by Department of Biotechnology (DBT), Government of India. It is an Interface Agency to strengthen and empower the emerging Biotech ecosystem.

HOLISTIC SUPPORT FOR ECOSYSTEM

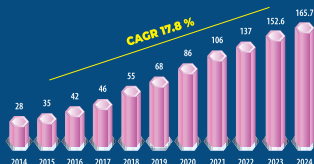


13+ YEARS OF IMPACT



BIRAC FUELS BIOTECH BREAKTHROUGHS, TURNING IDEAS INTO IMPACT

India's BioEconomy (2014-24)
(in Billion US\$)



Biotech Startup Growth
20x Growth in a Decade



BIRAC Programmes and Schemes Provide Support Across Product Development Cycle



June 16-19, 2025
| Boston, USA

Efficient Drug Development – Pre-IND to Global Clinical Trials

Our Services

Clinical Trials - Full Service End-to-End Execution

- Protocol Design & Development
- Global Clinical Strategy
- Clinical Project Management
- Medical Monitoring
- Site Monitoring
- Site Identification
- Data Management and Statistics
- CSR Writing

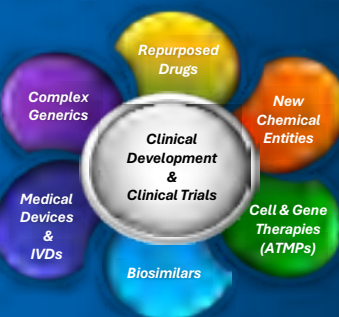
Clinical Development & Regulatory Affairs

- Pre-IND / Scientific Advice
- Clinical Trial Application / IND
- Clinical Path – Clinical Trial Waivers

Pharmacovigilance & Post – Marketing Surveillance

- Safety Management in Clinical Trials
- Post – Marketing Studies
- Pharmacovigilance Operations

Our Expertise is Across Categories of Products



Global GCP Compliant Clinical Trial Execution

✓ Solid track record of conducting clinical trials across all 4 phases

Phases of Clinical Trials



CLINEXEL-Clinical Trial End to End Execution Including Regulatory Negotiations

- ✓ Clinical trials for product registration in India
- ✓ Clinical trials for export or global product registration (India data for US, EU, ROW)
- ✓ Clinical Trials in EU, US, Australia, China, India, and Africa
- ✓ AICROS full member- leveraging local presence of AICROS members



Member of AICROS
since July 2020
(www.aicros.com)



Value added strengths in Clinical Trials

- Cost efficiencies (cost and time) by using optimization levers
- Design efficient protocol and support regulatory negotiations
- Regulatory Negotiations → Expertise & Experience Across 505(b)(1), 505(b)(2)/Hybrid Applications, & Complex Generics —Inhalation, Dermatology, & Ophthalmic Generics



Dr. Deepa Arora, MD
Chief Executive Officer
(Ex. Vice President, Global Head - Lupin Limited,
Indian Pharma & CROs)



Dr. Mukesh Kumar, MD
Chief Scientific Officer
(Ex. Sr Vice President - Dr Reddys Lab, CIPLA)
Clinical Research Director, Global R&D – Sanofi,
Daiichi Sankyo



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ISO 27001:2022:ISMS



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info@clinixel.com



Improving access to biosimilars for patients across the globe

CuraTeQ Biologics (a wholly owned subsidiary of Aurobindo Pharma Ltd.) is a biopharmaceutical company based out of Hyderabad, India. Our vision is to improve the wellbeing of patients suffering from debilitating illnesses by providing them access to high quality and cost-effective biosimilars.

Product Pipeline and Approvals



Development pipeline of 14 biosimilars with focus on oncology, immunology, and respiratory segments



EU GMP compliance certification for mammalian and microbial drug substance and drug product manufacturing unit located in Hyderabad, India

- **BEVQOLVA[®] (Bevacizumab biosimilar) has received UK MHRA marketing approval**
- **ZEFLYT[®] (Filgrastim biosimilar) and DYRUPEG[®] (Pegfilgrastim biosimilar) have received EMA marketing approval**
- **DAZUBLYS[®] (Trastuzumab biosimilar) has received CHMP positive opinion and CDSCO (India) marketing approval**

Development Capabilities



State-of-the-art R&D Centre with footprint of 33,000 sq. ft.



Over 125 scientists (PhDs to Masters ratio of 1:5) with expertise in clone, process, and method development for small proteins to complex monoclonal antibodies

cGMP Capabilities



EU GMP Certified 140,000 sq. ft. multi-product facility for manufacturing, warehousing, packaging, and labeling



Designated sections for manufacturing microbial and mammalian bulk drug substance (DS)



Segregated suites for drug product (DP) filling in vials, pre-fillable syringes, and cartridges



CuraTeQ Biologics (Manufacturing Site)

Survey No. 77 & 78, Indrakaran Village,
Kandi Mandal, Sangareddy District,
Hyderabad, Telangana - 502329, India

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Rewriting the Intracellular Delivery Mechanism for Biologics and Beyond

CyGenica is a deep science biotech startup transforming intracellular delivery with GEENIE, a patented, first-in-class protein nanoneedle. Unlike viral vectors or lipid nanoparticles, GEENIE enables non-toxic, endosome-free delivery of siRNA, ASOs, proteins, and gene editors directly into the cytoplasm. This breakthrough platform shows superior performance across liver, brain, and ocular models offering a powerful alternative for treating previously intractable diseases. With strong proof-of-concept data and a non-toxic profile in vivo, CyGenica is forging strategic partnerships with global pharmaceutical leaders to co-develop next-generation therapies and building a globally competitive drug delivery platform.

To collaborate or learn more, visit
www.cygenica.com

CYGENICA



**INNOVATE
KARNATAKA**



BT Policy

Karnataka

A Biotech Frontrunner

Karnataka BioEconomy 2025

Valuation of Karnataka Bio Economy (\$bn)	States contribution to India Bioeconomy (%)	Biotech startups in the state	R&D investments of the state (mn) approx.
\$32.4	19.5%	1,232	\$300

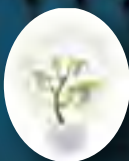


Glance through Biotech
Ecosystem in Karnataka



GIA-To explore
global collaboration

Centres ready for joint initiatives



CoE
Agri Innovation



CoE
Aquamarine



CoE
Healthtech & Medtech

**Join
THE BIOTECH
REVOLUTION in
KARNATAKA**

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Kumara Park West,
Bengaluru 560020



ICBio Clinical Research

An independent full-service Contract Research Organization(CRO), INDIA,
delivering high-quality, end-to-end clinical research solutions,
Bio-availability / Bio-equivalence Studies & Clinical Trials Phase I – IV



Drug Controller
General
of India (DCGI)



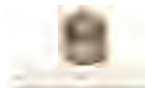
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GCLP Accreditation



ISP Chile



EMA



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4 CPUs facility with Bio-analytical testing services,
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- Tablet (IR, ER, DR, OD, EC)
- Capsule (Soft Gel, MR)
- Chewable Tablets
- Suspension
- Granules
- Sublingual

Rectal

Transdermal

Vaginal

Pulmonary

Global
56
countries
around the globe

70+
Plus Staff
members

1000+
BA/BE Studies

7+
Physicians

80+
Satisfied
clients

500+
trials supported

7
Accreditation
and certification

20+
Therapeutic areas

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IKP Knowledge Park: Catalyzing Innovation from India's Genome Valley

IKP Knowledge Park is a pioneering science park and incubator located in Genome Valley, Hyderabad, India's first organized cluster for life sciences R&D and clean manufacturing. Dedicated to nurturing innovation in deep science and technology, IKP has, over the past two decades, supported more than 1,900 innovators and companies in the life sciences sector.

Spread across a 200-acre, state-of-the-art green campus, IKP offers a robust ecosystem comprising world-class laboratory infrastructure, incubation and co-working spaces, competitive grant programs, seed funding, IP, regulatory & technology transfer support, and dedicated mentorship, all designed to accelerate the journey from idea to impact.

A cornerstone of IKP's current strategy is internationalisation, fostering cross-border collaborations for co-development, co-funding, and market access. By bridging Indian innovation with global partners, investors, and ecosystems, IKP is enabling the creation of scalable, inclusive, and sustainable solutions with global relevance.

IKP welcomes international partners to collaborate and co-create transformative innovations that positively impact the planet.

Write to us at engage@ikpknowledgepark.com to explore partnership opportunities.

To explore partnership opportunities: engage@ikpknowledgepark.com

For more information, please visit www.ikpknowledgepark.com



a One Health company

- 5 Bn doses produced till date
- 90 Mn doses of Human vaccines produced last year
- Touching 250000 Human lives everyday
- 492 Mn doses of animal vaccines produced last year
- Touching 13 Mn animal lives everyday
- Leadership in Human & Animal Health vaccines
- Multi product, multi dosage forms capability
- Multispecies viral & bacterial facility
- State of the art BSL3 facility
- 4 Manufacturing facilities globally

Human Vaccine Portfolio

Hep A | Td | MR | Rabies | DPTHiHepB | Hep B | DPT | TT



LEADERSHIP

AGILITY

ENABLER



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Khurana & Khurana (K&K) is a leading IP, Commercial/Corporate, Tax, Banking, and Litigation/Arbitration Law Practice in India, and comprehensively undertakes legal representations of numerous Corporates ranging from Fortune 5 to Cutting-edge Start up entities through its core team of over 350 professionals spread across 15 offices in India, South-East Asia, and GCC. On the IP front, K&K represents several leading Global Entities by handling a portfolio of over 6000 new patent applications a year, and over 7500 new Trade Mark applications a year, making its experience in overall Portfolio Creation, Management, and Enforcement cutting-edge comprehensive and thorough.

K&K is strongly recommended by Chambers, Legal 500, Managing IP, IAM, Asia-IP, RSG, Acquisition-INTL, Corp-INTL, and Benchmark Litigation, and is also ranked as the highest PCT filing law firm in India along with several firm members being individually ranked for their litigation and prosecution practices. Apart from having multiple offices throughout India, K&K has several offices in South-East Asia with proudly over 60% women force along with direct representation in UAE/GCC, and therefore can directly represent clients in all such regions along with in other global territories through its strong network of foreign associates.

For more information, please visit www.khuranaandkhurana.com

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4. Contract Manufacturing
5. Custom Chemical Synthesis

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- Analytical Research & Development
- SEED (Skill Enhancement & Education Development)



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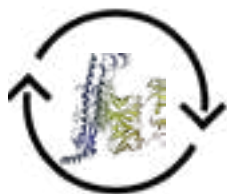
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First-in-class and best-in-class mRNA vaccines and cancer immunotherapies using generative AI-enabled computational protein design

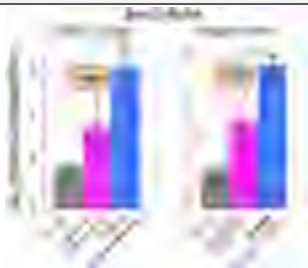
PopVax is an Indian full-stack biotechnology company developing novel mRNA vaccines and cancer immunotherapies using generative AI-enabled computational protein design. We have developed novel mRNA architectures for immunogen display, a lipid nanoparticle (LNP) delivery platform for mRNA using PopVax-designed novel ionizable lipids, and a machine learning-powered immunology feedback loop for vaccine and immunotherapy design. We are **open to collaboration on vaccines and cancer immunotherapies**, as well as out-licensing our novel ionizable lipids and LNP formulations. Our **RNA Foundry** service can take your novel RNA therapeutics from sequence to **clinical trial doses**, including process & analytical development and tox studies, in under 6 months.

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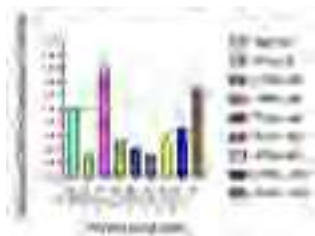
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Generative AI-powered
high-throughput immunology
feedback loop for vaccine and
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mRNA-encoded immunogen
display architecture that boosts
the breadth and potency of the
elicited immune response
(**>250x increase in Ab titer in mice**)



Library of 600 novel ionizable lipid
designs, with 1000s of LNP
formulations tested *in vitro* and
in vivo – PopVax LNPs are non-toxic
and perform equivalently to
market-leading LNPs for vaccine
delivery in rodents



RNA Foundry:
Fast-turnaround GMP
manufacturing and
comprehensive analytical +
QC platform that allows us to
rapidly advance novel mRNA
biomedicines to clinic
end-to-end

**Unprecedented
speed & scale of testing:
in just 3 years, we have –**

Synthesized **110+**
novel ionizable lipids

Tested **2000+** unique
LNP formulations

Injected **1000+** unique
vaccine designs in mice

Performed **15000+**
immunoassays

Key funders & sponsors



balvi
(Ethereum co-founder
Vitalik Buterin)



**Won \$20M+ in
non-dilutive funding
over 3.5 years**

Prescience Insilico

Applying DeepTech to Scientific Research

Prescience Insilico is transforming the innovation roadmap for digital R&D. By leveraging advanced AI, machine learning, and physics-based simulations, we accelerate product development, reduce experimentation cycles, and drive sustainable innovation across sectors.



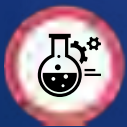
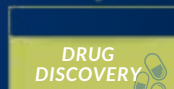
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Deep-tech enabled Software Platform for drug discovery & screening



Digital Scientific Services (R&D)

- Integrated physics and AI/ML-based **digital R&D services** with a strong focus on **smart materials** and **specialty chemicals research**
- Expertise includes **novel material compositions, formulations, advanced chemistry, bespoke property optimization** and beyond



Proprietary Platform Technologies

- AI based QSA/PR, AI-ADMET, BBB, permeation and solubility prediction
- Active library of drug-like compounds for more than 50 kinases
- Digital twin** for Skin, Hair, Oral care, home care formulation and microbiome



Prescience- Digital Transformation for R&D

- Development of customized analysis tools, web tools, image processing tools, & pipelines
- Built for scientific IR&D, offering AI/ML capabilities, access control, authentication, and an admin console for streamlined management
- Accelerate discovery through your data

WHY CHOOSE US?

Innovative Solutions: AI-driven, precise, and efficient computational R&D services

Collaborative Approach: Accelerate innovation and achieve sustainability goals through scientific partnership



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Advancing Biomanufacturing with Recombinant Bioreagents



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Pegaspargase Bulk
Streptokinase Bulk
Semaglutide Bulk
(Recombinant)



Recombinant Bioreagents

Provinase®
(Endonuclease)
Carboxypeptidase B
PNGase F
Human Albumin
Trypsin
Kex2 Protease
Enterokinase



Peptide APIs

Semaglutide
(Synthetic)
Tirzepatide
Leuprolide Acetate
Desmopressin
Acetate
Octreotide Acetate



CDMO/CMO Services

Clone development
Process development
Formulation development
Large scale manufacturing

BULK SUPPLY | GMP MANUFACTURING | CUSTOM OEM

STATE-OF-THE-ART GMP FACILITY

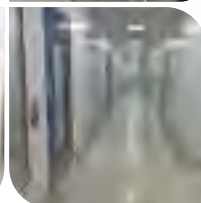
- Purpose-Built for GMP-Grade Proteins
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- Scalable processes to meet growing global demand
- End-to-end supply chain support



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Provis Biolabs



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Shilpa Biologicals Pvt Ltd

Shilpa Biologicals is one of the largest fully integrated CDMO supporting end to end Drug Discovery, Development, GMP Manufacturing, Fill-Finish and Packaging solutions for NBE's, Biosimilars, ADC's and Vaccines. Our strong scientific expertise with focused approach is dedicated to bringing molecules from lab to market in short lead time providing cost effective solutions.

Our Expertise

Our Team

- 300+ years of cumulative experience
- 120+ dedicated team
- Highly qualified team with PhD's and Post-Doc's
- Strong QA, QC and Regulatory team

Experience

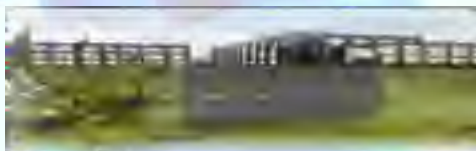
- Completed multiple projects
- mAb's & Non mAb's Ratio - 50:50

Our Technologies

- Perfusion System
- AKTA Pilot Chromatography System
- Screening clones using AMBR
- Huge capacities to handle large scale commercial production
- Three independent fill finish suites with automated filling lines

End-to-End CDMO Solutions

Cell Line Development	Process Development	Drug Substance	Drug Product
<ul style="list-style-type: none"> • Developability studies • Gene/Plasmid synthesis • Stable pool, RCB • Mammalian and Microbial platform • CHO DG44, CHO S, CHO ZN, CHO K1, CHO GS etc., • Pichia & E.coli • Analytical development, comparative studies, Bioassays & Development studies 	<ul style="list-style-type: none"> • Upstream process development • Downstream process development • Pre -Formulation development • Analytical development 	<ul style="list-style-type: none"> • MCB & WCB preparation and characterization • Viral clearance studies • Tox batch – 50L & 200L scale • DS Process validation • DS Engineering batches • DS GMP batches – 50L, 200L, 1,000L & 2,000L • DS stability • Microbial – 20L to 55,000L 	<ul style="list-style-type: none"> • Formulation Dev • Process Characterization • DP Process validation • IND/BLA • DP Engineering batches • Fill- Finish • DP stability • Packaging • Regulatory support



Website : www.shilpabio.com
 Email:
madhav@vbshilpa.com
sridevi@shilpabio.com
ajay.gopaluni@shilpabio.com



SRM
INSTITUTE OF SCIENCE & TECHNOLOGY
(Deemed to be University u/s 3 of UGC Act, 1956)

SRM Institute of Science and Technology (SRMIST), was established in 1985 at Kattankulathur, Tamil Nadu, India. SRMIST is one of the top-ranking multi-disciplinary private universities in India. The Institute offers academic programs in six major Faculties namely, Engineering & Technology, Medicine & Health Sciences, Science & Humanities, Management, Law and Agricultural Sciences through 23 Schools, 116 Departments and 18 Centers of Excellence for Research, offering 109 UG and 145 PG programs. The BIRAC BioNEST at SRMIST focuses on nurturing early-stage biotech and healthcare startups by providing world-class infrastructure, technical mentorship, and access to high-end lab facilities to bring their ideas to market. The BioNEST at SRMIST is supported by the Centre for Clinical Trials and Research (CCTR) and the Division of Medical Research (DMR) providing a holistic validation to the healthcare products. The SRMIST's Directorate of Entrepreneurship (DEI) at Kattankulathur Campus promotes the entrepreneurship and innovation ecosystem. The DEI also manages the University's patent portfolio through the Centre for Intellectual Asset Protection (CIAP).

SRM Technology Transfer Office (SRM TTO) works with the inventors to commercialize the intellectual property. Bootstrappers' Research Council (BRC) which is registered as a Section 8 non-profit company, operates the university's incubator focusing on supporting startups through various critical stages including Pre-Incubation, Incubation, Fundraising, Mergers & Acquisitions, and Technology Commercialization.

For more information, please visit www.srmist.edu.in

Email address: director.dei@srmist.edu.in

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Medicinal
Chemistry

Synthetic
Chemistry

Process Research
& Scale-up

Drug Substance
Manufacturing

ADME-PK
Services

Key Numbers : 2024



10+
Years of business
operations



30+
Global Clients Across
Key Markets



Trusted by **3** of the
Top **10** Global Pharma
Companies



500+
Compounds Successfully
Delivered



100+
Highly Skilled Scientists
& Chemists



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Guidance TamilNadu

Guidance Tamil Nadu is the investment promotion agency of the Government of Tamil Nadu, India's most industrialized state. With a robust and diverse industrial ecosystem, Tamil Nadu is advancing its biotechnology sector with a focused, mission-driven approach.

As a single-window facilitation body, Guidance offers end-to-end support to investors through a dedicated team of sector specialists, policy advisors, and international consultants. We streamline the investment journey by coordinating with industry stakeholders, community partners, and government departments—consolidating efforts to ensure a seamless and efficient business experience. In the life sciences sector, Guidance's primary objective is to position Tamil Nadu as the investment destination of choice.

TICEL Biopark Limited

TICEL Biopark Limited, Chennai, Tamil Nadu, India is a state-of-the-art Biotechnology Park established in 2004 in Tamil Nadu, India. TICEL Biopark is promoted by TIDCO (Tamil Nadu Industrial Development Corporation) in **technical collaboration with Cornell University, USA**. TICEL Biopark supports Biotech ecosystem from their early stage of research to pilot-scale production by providing laboratory infrastructure and equipment support. Major companies such as Biocon biologics, Teva pharma, Levim biotech, Amway, Johnson & Johnson, Hiyoshi India and Revvity Health sciences are located in Ticel Bio Park.

The Biotech Core Instrumentation Facility, housed at TICEL Biopark, provides equipment support to startups and industries. TICEL provides Laboratory infrastructure which supports to create GMP/GLP/ Contract Research (CRO) / Contract Manufacturing (CMO) / testing facility. TICEL undertakes contract research and contract manufacturing work at its Biotech Core Instrumentation Facility.

For more information, please visit www.ticelbiopark.com

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Vipragen Biosciences is an OECD GLP, AAALAC, and NABL/ISO 17025 accredited preclinical Contract Research Organization (CRO), with 20,000 SFT State-of-the-art Vivarium located in Mysore, India. We offer pre-clinical contract research services to clients worldwide, specializing in In-vitro Biology, Toxicology, and Analytical Testing, adhering to regulatory standards such as US-FDA, EFSA, and TGA.

- ✔ Vipragen is a dynamic and adaptable preclinical CRO, providing comprehensive end-to-end services with a focus on agility and responsiveness to meet the unique needs of our clients.
- ✔ Our team consists of multi-disciplinary experts in In-vitro & In-vivo Pharmacology, Bio-analytical, ADME/DMPK, and Regulatory Toxicology.
- ✔ We are deeply committed to quality, integrity, and customer satisfaction. Our project management teams have extensive experience handling global client projects, consistently exceeding expectations.
- ✔ Our in-vitro team has established over 100 assays across various therapeutic areas, and we have more than 50 validated animal models in Oncology, CNS, Inflammation, Dermatology, Ophthalmology, and Immunology.
- ✔ We have conducted over 1000 toxicology studies for regulatory submissions, including Acute, Sub-acute, and Repeated dose (28 days, 90 days), Development and Reproductive Toxicology (DART) studies, and Genotoxicity studies.

To collaborate or learn more,
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VIPRAGEN

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Accelerating Deep Tech Innovation for
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Leveraging Synthetic Biology for affordability

Pheromone-based mating disruption over 100M hectares

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- Disrupting pest life cycles to reduce pesticide dependence
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Nature's Sweetest Secrets Engineered for Wellness

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A First-in-Class Vaccine

Targeting Fat Metabolism, Not Appetite

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prevents liver fat
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no weight rebound
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YASHRAJ BIOTECHNOLOGY

Established in 1999, Yashraj Biotechnology Ltd. (YBL), headquartered in Mumbai with offices in the US and Germany, is a pioneer in the In Vitro Diagnostics reagent space and an emerging CRO specializing in preclinical drug discovery.

Our core capabilities are in the manufacturing of Native and Recombinant Antigens, as well as Monoclonal and Polyclonal Antibodies that are used by most of the top IVD companies across the globe. Our more than 300,000 sq ft of research and manufacturing space allows us to be a partner to global companies in the diagnostics and life sciences space.

Our expertise also lies in developing human induced pluripotent stem cell (hiPSC)-based models and products for disease research, advancing human relevance in preclinical testing. Supported by a state-of-the-art GMP facility, YBL offers a comprehensive range of iPSC-derived products and services, including cell-based assays, drug screening, efficacy testing, safety profiling, and disease modeling. YBL has built a reputation for unwavering quality and reliability. This commitment to excellence drives our efforts to push the boundaries of translational research and accelerate the development of next-generation therapeutics.

For more information, please visit www.yashraj.com

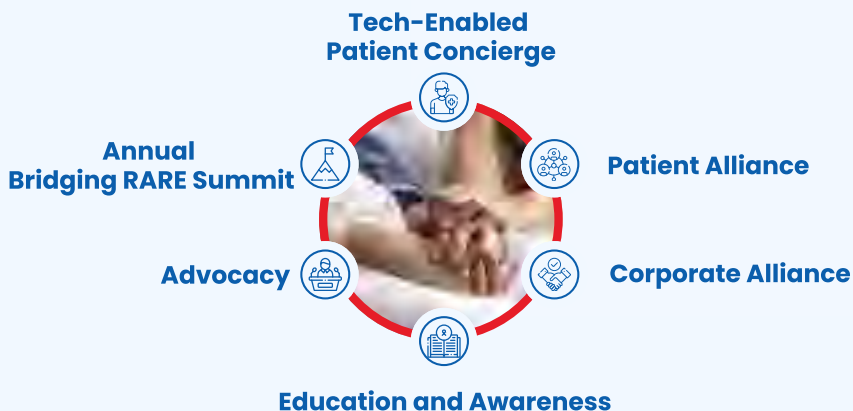
Email address - raj@yashraj.com



Indo US Organization for Rare Diseases

Bridging Nations, Empowering RARE Lives

Our Initiatives



Our Impact

65	157	20,000+
Patients Alliance Members	Patients Supported	Patients Connected
38	20	
Events Hosted	Global Partnerships	

JOIN US AT

Indo US Bridging RARE Summit 2025

Date:

November 2-4, 2025

Location:

Hylton Performing Arts Center,
George Mason University, Manassas, VA

summit.indousrare.org

#bridgingrare



www.indousrare.org

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Association of Biotechnology Led Enterprises

Association of Biotechnology Led Enterprises - ABLE is a not-for-profit pan-India forum that represents the Indian Biotechnology Sector. It was launched in April 2003, after industry leaders felt a need to form an exclusive forum to represent the Indian Biotechnology Sector.

ABLE has over 400 members from all across India representing all verticals of the sector like Agribiotech, Bio-pharma, Industrial biotech, Bioinformatics, Investment banks and Venture Capital firms, leading Research and Academic Institutes and Law Firms and Equipment Suppliers.

The primary focus of ABLE is to accelerate the pace of growth of the Biotechnology sector in India, through partnering with the Government in their biotechnology initiatives to deliver optimal policies and create a positive regulatory environment, encouraging entrepreneurship and investment in the sector, providing a platform for domestic and overseas companies to explore collaboration and partnerships, forging stronger links between academia and industry and showcasing the strengths of the Indian biotech sector.

ABLE Council of Presidents, that comprises of all past presidents of the organization, has been set up to provide impetus to the growth of the Biotech business ecosystem to leverage their multi-sectoral expertise. ABLE thus catalyses a symbiotic interface between the industry, the government, academic and research institutes and domestic and international investors.

To collaborate or learn more,
www.ableindia.in

LET SCIENCE DO THE TALKING

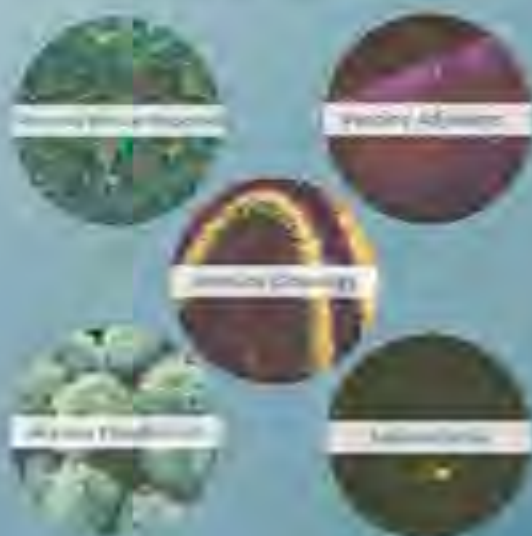
From Targets to Drugs

Curadev is a clinical stage biotech company, dedicated to discovering and developing novel small molecule therapeutics for the treatment of intractable diseases.

Utilizing a target-centric approach, innovative screening schemes, and traditional wet-lab chemistry and pharmacology, Curadev has built an impressive portfolio of discovery research programs, resulting in patent-protected drug candidates that modulate next-generation drug targets.

Areas of Interest

Our programs seek to ameliorate disease by translating cutting-edge discoveries into new medicines.



CONTACT US

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CURADEV

Let science do the talking.

INERA[®]
by absolute

Breakthrough Bio-enabled Farm Inputs

Biocontrols | Seedcoating | Biostimulants | Biofertilizers

RNA, Peptide and
Enzyme Based Products

2.5 Mn+

sq. ft. R&D center

8.5 Mn+

Farmer loc. in process

9+

Experiments
Technologies



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