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Pharma industry in Africa at crossroads

DR SANJAY AGRAWAL

EMERGING healthcare challenges in Africa have increased the demand for generic drugs. With many drugs losing their patents, leading South Asian companies, particularly those from India, Bangladesh, and Sri Lanka, as well as a few from Africa, are preparing to capitalise on the upcoming opportunities.

Most African countries are middle-income countries, and the healthcare challenges they face today are enormous. This scenario has put significant pressure on the pharmaceutical industry to produce high-quality medicines at lower and more affordable prices. Taking advantage of this opportunity, the Indian pharmaceutical industry has been at the forefront of the world's manufacture and export of generic drugs. African countries have reaped the most benefits of all.

excellent opportunities for domestic and international companies with rising healthcare demand. As growth opportunities shift away from traditional pharmaceutical markets, most multinational corporations want to expand their global footprint to include Africa. It is a continent with enormous potential, but developing a viable market strategy will be difficult.

Understanding the dynamics and underlying demographics will be critical for ensuring a long-term business model. IMS Health conducted a study that combined IMS intelligence with secondary research and primary interviews with pharmaceutical companies, international organisations, and African organisations.

Pharmaceutical spending in Africa is expected to reach \$30 billion by 2016. This value is driven by a 10.6 per cent compound annual growth rate (CAGR) from 2010 to 2016, which is second only to Asia Pacific (12.5%) and in line with Latin

forecast that FDI in Africa could more than double by 2014, despite speculative money leaving the continent following the collapse of Lehman Brothers and the Arab Spring constrained investments in North Africa.



APIFA team explains what the API For Africa facility is all about and How it operates?

The current Covid-19 vaccine production and roll-out demonstrate the geographically skewed pharmaceutical manufacturing capacity. As a result, when it comes to access to medicines, Africa is the most underrepresented continent. While Africa is home to approximately 400 drug manufacturers, Sub-Saharan African countries still import more than 70% of their medicines.

The issue is especially acute for active pharmaceutical ingredients (APIs): Africa has almost no API manufacturers. The disruption of global supply chains caused by the Covid-19 health emergency has resulted in significant delays in accessing much-needed raw materials, including APIs, to produce medicines. This has resulted in the underutilisation of local production capacity and hampered access to medicines.

However, the December 17th, 2020, announcement of a novel financing facility dedicated to manufacturing APIs in and for Africa is intended to address this challenge. The European Investment Bank (EIB) and API for Africa (APIFA) have collaborated to create a EUR 50 million loan facility, which was approved in November 2020 and launched in December 2020. APIFA is a non-profit organisation that aims to build API manufacturing capacity in Sub-Saharan Africa.

"The announcement came at the right time for the continent," says one of the initiative's directors. "Beginning API manufacturing in Africa is an important step toward changing the pharmaceutical supply chain." This will be extremely beneficial to the continent, not only in terms of health commodity security but also in terms of increased employment."

According to experts, the initiative has the potential to create hundreds of skilled and specialist jobs, build on the existing strengths of African pharmaceutical companies, and improve access to medicines for over 1 billion people.

Africa needs manufacturers with a strong focus on product quality, a track record of commercial success, and established regional distribution channels. Furthermore, they should have a strong desire to pursue GMP and an immediate desire to enter the API production market. They should also pledge to use the best manufacturing and sustainability practices.

The API factory must be located in

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The pharmaceutical industry in Africa is at crossroads. These countries, which have a more economically disadvantaged population and a growing disease burden, present enormous opportunities for regional pharma companies and Western majors.

According to Tectura Lifesciences' Asian Pharmaceutical Industry Report 2012, Asia is undeniably a key driving force in the global pharmaceutical industry, given its traditional resourcefulness and determination.

Healthcare demand among the region's populations has increased in recent years, and the region's low operating costs continue to attract pharmaceutical companies. The region is emerging as a pharmaceutical R&D powerhouse, aided by the availability of a large patient population, high-quality data, lower costs, and skilled labour.

African Pharmaceutical Profile

The African pharmaceutical sector provides

America (10.5%) during this period. This market could be worth \$45 billion by 2020, thanks to a convergence of demographic changes, increased wealth and healthcare investment, and rising demand for drugs to treat chronic diseases.

Pharmaceutical growth reflects economic strength, which is accompanied by rising healthcare spending. Sub-Saharan Africa (SSA) stands out in this regard, excluding South Africa. According to the Economist Intelligence Unit, its economies are growing faster than any other in the world, and this trend is expected to continue.

The appearance of Africa is not its size (the continent accounts for only 3% of the global economy) but in the dynamics that drive long-term growth when the major established pharmaceutical markets face uncertain futures. A series of positive economic trends underpin these prospects: greater political and fiscal stability, as well as improvements in pro-business legislation, have led the United Nations (UN) to

Heavily reliant on imported raw materials

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Sub-Saharan Africa. On the other hand, the proprietors or partners can be from anywhere in the world. APIFA can assist in tiering partnerships across geographies.

In addition to EIB financing, APIFA will connect the applicant with co-investment opportunities if this is of interest. In addition to the technical service package, we will assist manufacturers during the application stage, including work feasibility, access to technology, and market access, among other things.

Indian pharmaceuticals in Africa

With diseases ranging from anaemia and malnutrition to infectious diseases such as HIV/AIDS and lifestyle disorders such as diabetes, cardiovascular disease, kidney failures, drug addiction, cancer, and paralysis, the pharma sec-

tor's growth is fueled by the rising prevalence of illness, on the one hand, and growing awareness of preventive healthcare, on the other. As a result, the drug market ranges from antibiotics to ophthalmology, nephrology, oncology, psychiatry, and neurology.

According to members of the Indian Drug Manufacturers Association, the Indian Pharmaceutical Association, and the Karnataka Drugs and Pharmaceuticals Manufacturers Association, Africa is a potential export market for Indian pharma.

Recent developments in Africa

East Africa has the world's largest pharmaceutical manufacturing industry. Kenya's pharma and healthcare market offers a significant revenue generation opportunity in this area. East Africa also has a free pharmaceutical pricing

environment with no import tariffs. APIs, excipients, and intermediates are heavily reliant on imported raw materials.

"The western part of North Africa is highly competitive in terms of price and is expected to become more competitive in the future." As a result, we must introduce and strategically promote our products to gain a fair share of the various African markets. The R & D products, particularly Sulbactam, have significant potential as one of the major consumables for the treatment of Antimicrobial Resistance, which is a major threat to humanity's survival. "Considering the growing population, AMR products have a lot of potential," said Venus Remedies' deputy managing director. ○

(The author is a leading pharmaceutical consultant)

Continent has roughly 375 drug makers

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turing skills of the market players that the manufacturers must provide APIs in bulk and meet the demand of the consumers which can drive the growth of the active pharmaceutical ingredients market. Availability of sub-standard and counterfeit drugs is acting as a restraint for hampering the demand of the active pharmaceutical ingredients market. Rising investment in research regarding the development of APIs will further increase the growth opportunities for the active pharmaceutical ingredients market. Disruption in the supply chain of APIs during Covid-19 acts challenging for the healthcare providers which may challenge the active pharmaceutical ingredients market.

Synthetic active pharmaceutical ingredients segment in Middle East and Africa region is expected to grow with the highest growth rate in the forecast period of 2021 to 2028 because increase of easy product and easy availability of raw materials. Saudi Arabia is leading the growth due to increasing prevalence of various chronic disorders.

Some African countries have a handful of local companies who produce for the domestic market. Most do not—and are currently uncompetitive for local drug production.

The continent overall has roughly 375 drug makers, most in North Africa, to serve a population of around 1.3 billion people. Those in sub-Saharan Africa are largely clustered in just nine of 46 countries, and they're mostly small, with operations that do not meet international standards. By comparison, China and India, each with roughly 1.4 billion in population, have as many as 5,000 and 10,500 drug manufacturers, respectively. And the sub-Saharan market's val-

ue is still relatively small, at roughly \$14 billion compared with roughly \$120 billion overall in China and \$19 billion in India.

Future markets

A pan-African approach has been taken to boosting the continent's domestic pharma production base, with large-scale schemes such as the African Union's Pharmaceutical Manufacturing Plan for Africa (PMPA), and 'Strengthening Pharmaceutical Innovation in Africa' report, which have developed shared templates and tools for industrial development and are encouraging countries to draw on centralised resources and adapt them to their specific national situations. Panellists at the recent Africa Development Week pharma event highlighted these two initiatives as important and in need of "a shot in the arm" if they're to properly service African countries' long-term devel-

opment goals. ○

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