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**High Commission of India,
Kingston**

Market Survey Report On Pharmaceutical Sector



High Commission of India
Kingston

M. Sevala Naik
High Commissioner

MESSAGE

I would like to take this opportunity to thank the members of the pharmaceutical sector in Jamaica and their participation in the development of the sector. After careful observation of the industry I have come to appreciate the dedication and hard work from the public and private sector as well as the Indian pharmaceutical representatives based in Jamaica. You all have been doing a tremendous job and I trust that your efforts will only improve as the sector grows with the advancement in technology and added resources.

My efforts as the High Commissioner of India is to increase bilateral trade between India and Jamaica, particularly within the pharmaceutical sector. At present, I have made several efforts to meet and dialogue with various stakeholders from India based in Jamaica to better understand the needs of the industry. Doing this, I have been able to identify several factors that could be implemented to facilitate the growth of the sector.

My mandate is to improve efficiency, productivity and overall improve bilateral trade relations between India and Jamaica as we seek to improve the well-being of our fellow human beings.

(M. Sevala Naik)



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Preface

The pharmaceutical industry in Jamaica is comprised of companies who engage in research & development, manufacturing and distribution of drugs for human and veterinary use. The perception of pharmaceutical products in Jamaica has changed the discussion on pharmaceutical products since the year 2015.

Jamaica import most of the its pharmaceutical products from The United States, India, Canada and Germany. Currently, the Jamaican pharmaceutical industry comprises of imports of generic drugs (mostly by the National Health Fund, NHF), over the counter drugs and also patented drugs. Jamaica imports approximately USD 17 million worth of pharmaceutical products from India which is just a fraction of the entire pharmaceutical imports. Jamaica also manufactures a few generic and over the counter pharmaceutical items which is mostly used in the local market.

This report presents an overview of the Jamaican Pharmaceutical Industry, an assessment of its trading partners especially at it relates to Indian distributors within the market, prospects for extensive trade between Jamaica and India. To identify areas where Jamaica can make its pharmaceutical market more favourable for current Indian players and for the entry of additional players and new products into its pharmaceutical industry to meet the demands of its growing population.

(M. Sevala Naik)
High Commissioner

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Background to Jamaica's Pharmaceutical Industry

Jamaica is a small Island developing state (SIDS) in the Caribbean region with a small- size economy and a high debt to GDP ratio. The Jamaican economy has the potential to grow if adequate measures are instituted. Jamaica's population size was recorded at 2.8 million in the year 2016. For Jamaica to achieve the United Nations Sustainable Development Goal (UNSDG) #3 (Good Health and wellness for its population), the country's health sector needs to be evaluated to identify the best way the Government is able to improve the health service quality provided to its population.

Despite, the need to address some inadequacies within Jamaica's health sector, healthcare in Jamaica is considered to be favourable. Since 2015, the Ministry of Health under the public-sector Modernisation and Transformation Program focused on improving access to health care and increase in the delivery of goods and services to its population. Healthcare in Jamaica is regulated through the operations of the Ministry of Health (MOH). The services offered in the Jamaican Healthcare sector are provided by both private and public sectors.

The regulation of Jamaica's Pharmaceutical Industry is done through the Pharmacy Council of Jamaica that was stabled with the Pharmacy Act of 1966. The Pharmacy Council of Jamaica was established in the year 1975 by the Ministry of Health, with responsibilities for the regulation of pharmacists, pharmaceutical students, pharmaceutical owners and authorized sellers of poison in accordance with the Pharmacy Act of 1966. The Pharmacy Act of 1966 stipulates that all pharmacy operators both public and private, students and owners should be properly registered. The Pharmacy Council of Jamaica has stipulated that there are over three hundred and eighty-seven (387) registered pharmacies both public and privately operated in Jamaica for the year 2014.

In addition, the Standards and Regulation Division of the Ministry of Health, Jamaica (MOH) administers the Food and Drug Act of 1964. The legislation provides the authorization for the manufacturing, importation, distribution and use of pharmaceuticals. The Standards and Regulation division ensures that all substances used as food, drug and cosmetics are effective, safe and of a high quality.

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Prior to the establishment of the National Health Fund (NHF) there was the Health Corporation Limited (HCL). The Health Corporation Limited (HCL) was established in the year 1994 as a quasi-private company and had the responsibility of ensuring cost-effective procurement and distribution of pharmaceuticals and medical supplies in Jamaica. The Health Corporation Limited, also had the responsibility to provide drugs to thousands of Jamaicans with various medical conditions at heavily discounted rates, as well as to purchase and distribute pharmaceutical items to Government-run Drug- Serv facilities across the Island.

In 2010, The Health Corporation Limited (HCL) was merged with the National Health Fund (NHF). Since then, the National Health Fund has had the responsibility of providing ‘financial support to the national healthcare system in Jamaica and improve its effectiveness and the health of the country’s population through institutional and individual benefits’.

The Pharmaceutical Division of the National Health Fund aims to offer the highest quality pharmaceutical and medical supplies to satisfy the needs of healthcare facilities throughout Jamaica. NHF distributes over 8000 pharmaceutical products and over 3000 medical sundry items. Through the use of its extensive network with local manufacturers, overseas manufacturers and wholesale retailers, the pharmaceutical division of the NHF provides ‘hard to get’ pharmaceuticals for life threatening and emerging diseases.

Individuals who are in need of health assistance are served by the NHF and the Jamaica Drug for the Elderly Programme (JADEP). JADEP is a public-private sector collaborative programme that was launched in 1996 by the Ministry of Health, which is to date operated under the National Health Fund. JADEP provides a list of drugs free of cost to beneficiaries who are 60 years and older for the treatment of chronic illnesses.

The lifestyle practices of most Jamaicans have led to a surge in chronic illnesses over the years. As a result, the demand for pharmaceutical drugs both prescribed and over the counter drugs has increased. This has sparked a surge in the narrative and rhetoric on Jamaica’s capacity to meet the increase demand for drugs to address its populations’ health issues.

Jamaica's Main Pharmaceutical Trading Partners

India

India is the largest supplier of pharmaceutical products globally. As per India Brand Equity Foundation (IBEF) indicates that India supplies 20% of global generic medicines in terms of volume. It is expected that India's export market in pharmaceuticals will expand in coming years. Currently, the Indian pharmaceutical industry has a breakdown of 21% over the counter (OTC), 70 % generic and 9 % patented of the country's total market revenue. India accounts for an estimated 30% in volume and has a value of 10% of the USD 70-80 billion US generic market.

Jamaica's import of pharmaceutical products from India stands at USD 21.4 million or 14 percent share of its Gross imports. India is one of Jamaica's largest trading partners in the pharmaceutical sector.

Germany

Germany boast the best International location for research production and distribution of pharmaceuticals at an exceptionally high level. The production of pharmaceutical products within Germany is valued over EUR 29 billion in 2013. For the year 2017, Germany's export in pharmaceutical products was recorded in the top ten exported products worldwide, valued at EUR 76.8 billion or 5.7% of total export.

Notwithstanding, Jamaica's total import from Germany in the year 2015 according to the United Nations COMTRADE, was valued at USD 12.33 million, with a share value of 14% of total imports.

United States of America

The United States of America is the largest market for pharmaceuticals and biopharmaceutical products, this accounts for 35% of the global market. According to the Pharmaceutical Research and Manufacturers Association (PhRMA), the United States has one of the most supportive domestic environments for developing and commercialising of pharmaceutical products. Firms in the United States conduct most of the research and development for

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pharmaceuticals themselves and has established intellectual property rights on most new medicines they produce.

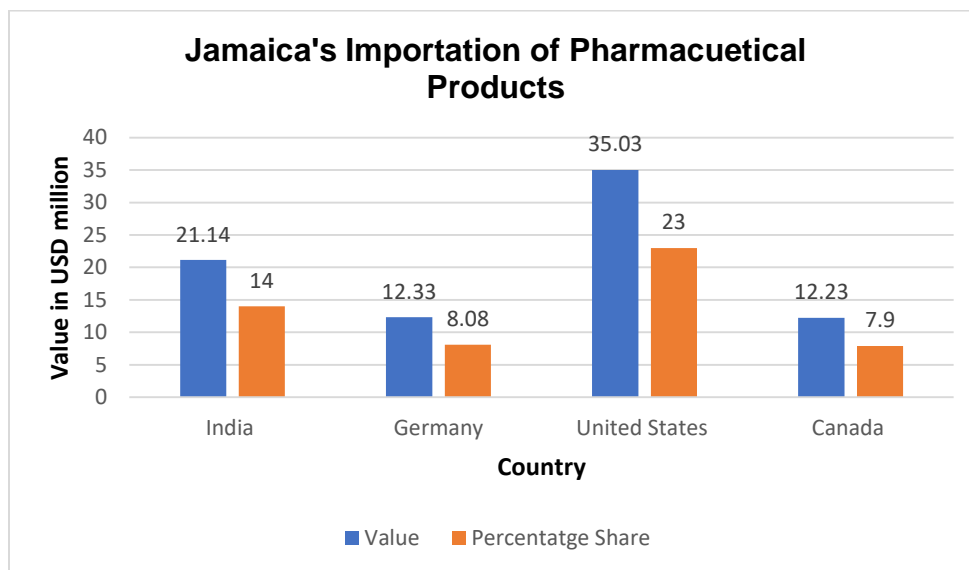
The Caribbean is the United States third largest export market in Latin America following closely behind Brazil and Mexico. Jamaica's import of pharmaceutical products for the year 2015 was valued at USD 35.03 million according to the United Nations COMTRADE database on international trade. The share value of imports in pharmaceutical products from the United States was recorded at 23% of total imported products from the United States.

Canada

Canada is classified as the tenth largest pharmaceutical market in the world and the second largest market in North America. Canada's pharmaceutical product sales represent only an estimated 2.6% of global pharmaceutical sales. However, Canada does have the potential to increase its sales in pharmaceutical products.

Jamaica's importation of pharmaceutical products from Canada in the year 2015 stood at USD 12.23 million, according to the United Nations COMTRADE database on international trade. Of the overall import in pharmaceutical products by Jamaica, a 7.9% share of total import in pharmaceutical products came from Canada.

Figure 1



Indian Pharmaceutical Industry in Jamaica

There is a strong presence of Indian pharmaceutical companies based in Jamaica. Currently, there are over 10 locally based Indian pharmaceuticals distributing companies. A few of these companies are: Glenmark, Dr. Reddy's, Indus Sciences, Indies Pharma Jamaica Ltd., Biporist, MSN labs, Javied Medical Distributors and Zorvia and others.

The Indian Department of Commerce has noted that India's total export to Jamaica has been on a steady increase. Exports have increased from USD 26.66 million in 2011-2012 to USD 40.21 million in 2015-2016. Overall, the total trade between Jamaica and India has also showed a steady increase from USD 28.8 million in 2011-2012 and increasing to USD 41.76 million in 2015-2016. For the period 2015 to 2016 USD 19.15 million from the total exports of USD 40.21 million were pharmaceutical products. Therefore, bilateral trade and primarily exports from India are largely pharmaceutical products. Secondly, exports from India to Jamaica are iron and steel reflecting total export of USD 2.45 million in 2015-2016 and textile and clothing reflecting USD 2.28 million for the same period 2015-2016.

Currently, Jamaica's export to India for the period 2015-2016 accounted for USD 1.55 million of the total export figure of USD 3.54 million. Even though there was an increase from USD 0.98 million in the financial year 2011-2012, bilateral trade with India is mostly based on the imports coming in from India to Jamaica, pharmaceutical products accounts for the majority of these exports.

India has placed a tremendous amount of research and development in the production of cheaper drugs labelled as "generic". Generic drugs are usually manufactured at a fraction of the cost it would take to manufacture the original drug and in most cases generic drugs are just as effective. The Indian Government began to encourage the manufacturing of generic drugs in the 1960's which resulted in the establishment of the Patents Act in the 1970's.

The India Brand Equity Foundation (IBEF) noted that India is the third largest producer of pharmaceuticals in terms of volume with 70% of the market share (in terms of revenue) consisting of generic pharmaceuticals. Overall, pharmaceutical exports accounts for 20% of the local export in terms of volume.

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India has a large number of scientist, doctors and engineers who help to steer the evolution and success of the pharmaceutical industry on its upward trend. Presently, 20% of the antiretroviral (AIDS/HIV) drugs used globally are supplied by Indian Pharmaceutical Companies.

Figure 2

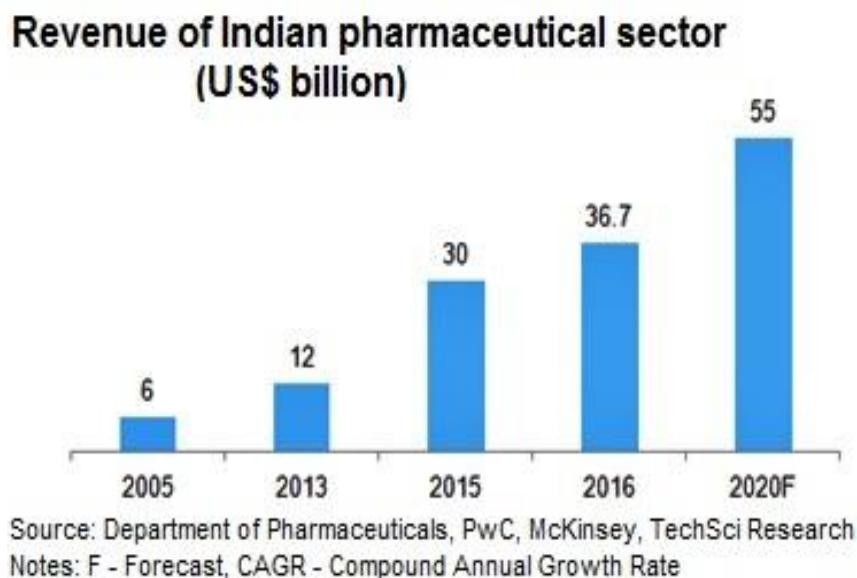
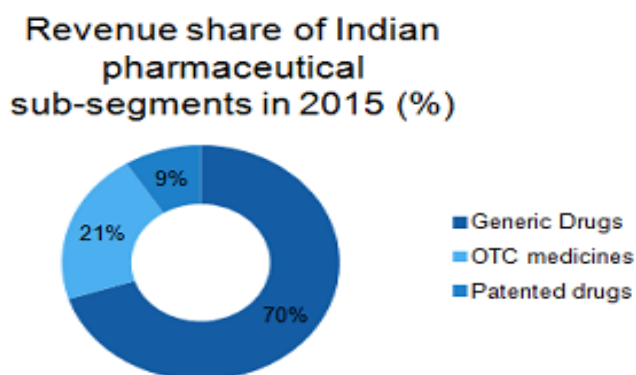


Figure 3



Source: Business Monitor International, FCCI Indian Pharma Summit 2014-15, TechSci Research

The Government of India has put in place initiatives to add to the continued success of the sector by initiating the 'Pharma Vision 2020', with the vision of making India a global leader in end-to-end drug manufacture. This will reduce the approval time for new facilities and ultimately boost investments.

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Data released by the Department of Industrial Policy and Promotion (DIPP) Foreign Direct Investments (FDI) for India attracted a snowball of inflows worth USD 14.53 billion between April 2000 and December 2016. The India Brand Equity Foundation (IBEF) states that there are over twenty investments initiated by private investors in India, these investors have strategized ways to improve on their investments in pharmaceuticals and ultimately to benefit India. Some of the major investments slated to take place are:

- **Piramal Enterprises Ltd** acquired a portfolio of spasticity and pain management drugs from UK-based specialty biopharmaceutical company Mallinckrodt Pharmaceuticals, in an all-cash deal for Rs1,160 crore (USD 171 million)
- **Sun Pharmaceutical Industries Ltd**, India's largest drug maker, has entered into an agreement with Switzerland-based Novartis AG, to acquire the latter's branded cancer drug Odomzo for around USD 175 million

The Indian Pharmaceutical sector is expected to grow to USD 100 billion by 2025. This growth has been the result of increased consumer spending, rapid urbanisation and other tactical initiatives to revamp the sector. Overall, India boast a very profitable and thriving Pharmaceutical Industry. As the sector increases, it would be beneficial for Jamaica and other Caribbean islands to benefit directly from the advance in the sector.

Currently, Jamaica has formed direct and indirect relations with various Indian distributors of Pharmaceuticals operating locally in Jamaica and in India. A brief profile of a few Indian pharmaceutical companies operating within Jamaica are as follows:

Glenmark India was founded with a vision to emerge as a leading integrated research-based, global pharmaceutical company. Over the decades, they have established themselves as a leading player in the discovery of new molecules both NCEs (New Chemical Entity) and NBEs (New Biological Entity). They have several molecules in various stages of pre-clinical and clinical development and are primarily focused in the areas of Oncology, Respiratory and Dermatology.

Indies Pharma Ja. Ltd. started its activities as a vertically integrated company offering consulting, regulatory & intellectual property services in addition to marketing and distribution services to its overseas pharmaceutical

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manufacturers. Initially, promoting the third-party brand names but strategically and eventually graduated to develop its own brand equity by securing intellectual property and trademarks. The company started its operations with 6 basic prescription drug presentations in 2005. Now, it has approximately more than one hundred (100) drugs present in the market. While the company has filed for over 350 drugs for licensing at the Ministry of Health in Jamaica with all the licenses on hand the company intends to secure at least a 10% share of the current Jamaican pharmaceutical market, which is estimated to be between USD 100 and USD 120 million per annum.

Bioprist is a 2007 incorporation in the United States of America. Bioprist is a Physician based organization founded by a group of Medical Doctors, Engineers, Environmental Specialists and PhD's but developed by a team of Medical Professionals, Media Consultants, Attorneys, Corporate management Gurus and the most dedicated and invaluable asset, the human resources in house along with field force compliment of BIOPRIST. Bioprist clientele are mainly Retail Pharmacies, Clinics, Hospitals, Physicians, Social Security organizations, Private Sector and Public-Sector procurement institutes in Jamaica and the wider Caribbean.

MSN Labs Jamaica was Founded in 2003, the Hyderabad based MSN Laboratories is one of the fastest growing research-based pharmaceutical company in India. Boasting a diverse product portfolio, with multiple products in the market and in the pipeline. MSN has 8 active pharmaceutical ingredient (API) (including Oncology) and 3 finished dosage facilities (including one for oncology) and an integrated research and development (R&D) Centre for Contract Research and Manufacturing Services (CRAMS) located in Hyderabad. MSN has won the trust of more than 250 customers across 65 countries around the globe covering the USA, Europe, Latin America, Middle-East, Asia Pacific, Africa and (Commonwealth of Independent States) CIS markets. Our product basket offers over 200 APIs & 120 formulations covering 35 major therapies.

Javied Medical was incorporated in 1996; Javied Medical is the forerunner for superior health care equipment, supplies and services. They offer equipment and supplies for hospitals, doctors' offices, dental offices, pharmacies, home care, vet clinics, laboratories, radiology labs and physiotherapy. Javied Medical Distributors Limited brings top quality products to consumers across the island.

Zorvia Pharma Limited was publicly incorporated on February 21, 1985. It is classified as a non-govt. company and is registered at the Registrar of Companies, Ahmedabad. Its authorized share capital is Rs. 100,000,000 and its paid-up capital is Rs. 62,433,500. Zorvia is involved in the manufacturing of other

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chemical products. Zorvia Pharma Limited is now listed as an amalgamated company.

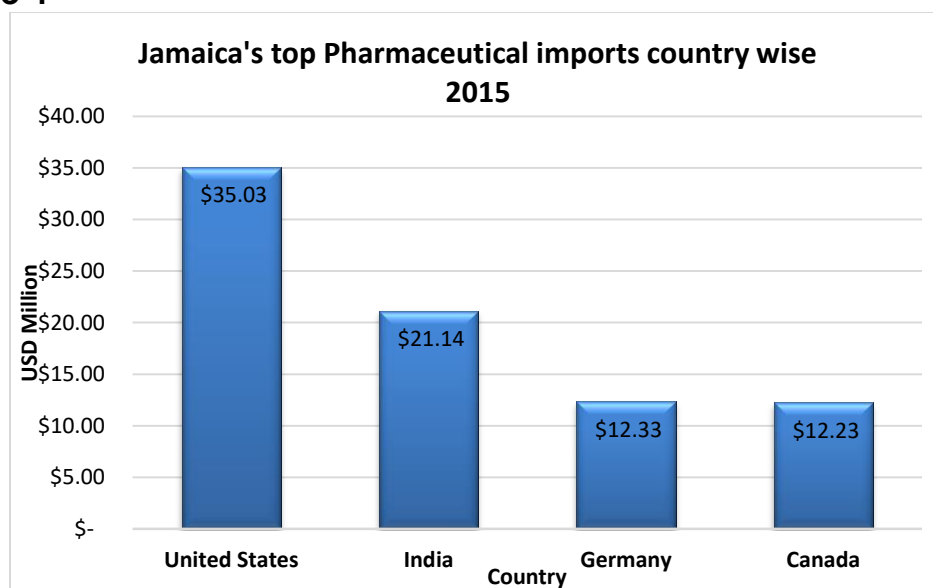
Dr. Reddy's Laboratories Ltd (The Global Generics) – India business was launched in 1986, with the brand Norilet (norfloxacin). It is a US \$300 Mn franchise today. Covering the whole spectrum of disease areas, our product range spans across gastroenterology, oncology, pain management, cardiovascular, dermatology, urology, nephrology, rheumatology and diabetes. Seven of our legacy brands are in the Top-300 of the Indian Pharma Market. Dr. Reddy's Laboratories was established in Jamaica in 1984 and is one of the largest Indian pharmaceutical companies with operations in Jamaica.

Jamaica's main pharmaceutical trade partners

According to global edge Jamaica's pharmaceutical import was recorded at 3.06% or USD 152.75 million of total imports which were recorded at USD \$4,993,029,817 for 2015.

Jamaica's major pharmaceutical trade partners are: The United States of America which accounts for a 23-percentage share or USD 35 million of the total pharmaceutical imports to Jamaica for 2015. The second highest importer was India with a 14-percentage share or USD 21.1 million, Germany was third recording an 8 percent share or USD 12.3 million followed by Canada recording a 7.9 percentage share or USD 12.2 million recorded of the total pharmaceutical imports to Jamaica.

Figure 4



(source:tradingeconomics.com)

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Presently, India supplies Jamaica with the highest number of generic pharmaceuticals followed by the United States, Germany and Canada. On a majority, the National Health Fund (NHF) in Jamaica is the largest purchaser of generic pharmaceutical drugs in Jamaica. Currently, the NHF carries a variety of 800 pharmaceutical items and 300 medical sundry items respectively. The NHF has further categorized the distribution of the range of products that they offer into 5 categories: medical sundries; x-ray products; pharmaceutical raw materials; dental supplies and sutures. The NHF currently acquires its supplies of pharmaceuticals from approximately 80 pharmaceutical and medical supplies companies located in 20 countries.

The National Health Fund plays a critical role in Jamaica's trade relations, as the largest purchaser of pharmaceuticals locally. It is pivotal to establish, maintain and develop a relationship with NHF. The National Health Fund was implemented in the year 2000 under the National Health Insurance Plan a unit under the Ministry of Health, Jamaica. After careful analysis of the health care system there is tremendous need for improvement. The analysis revealed that there are numerous diseases predominant among the Jamaican population and as such an in-depth proposal was prepared to carefully examine:

- Morbidity and Mortality statistics
- Mental Health Services
- The Population Dynamics
- Nutrition
- Health Manpower
- The State of Dental Service
- Hospitals and Available Personnel
- General Medical Services
- Primary Medical Care Facilities
- The Role of the Pharmacist
- Pathological Services

The proposal was accepted in the year 2001 to establish the inauguration of the National Health Fund. Funding was allocated on legislation for the NHF from three sources as follows:

- 20% of Special Consumption Tax charged on Tobacco products with effect from April 14, 2008.

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- 5% of Special Consumption Tax collected.
- 1/2% of annual earnings up to \$500K paid by employee and employer, collected by the NIS.

The overall mission of the NHF is to reduce the burden on Jamaica's health care system by providing assistance to improve the welfare of Jamaicans, address their health matters, provide support to health care providers, both public and private entities who aid in serving the population. Therefore, the NHF has a two-category benefit: first individual benefits accessed directly by patients and there is the Institutional benefit which is accessed by government and non-government organizations.

After close examination of some of the major players responsible for the importation of pharmaceuticals in Jamaica such as the National Health Fund with presence predominantly in the public hospitals and major clinics across the island. It is clear that India has the capability to increase their exports of pharmaceuticals to Jamaica on the basis of introduction of new and emerging drugs, innovation & modification of older drugs and the introduction of new drugs to the Island. According to India Brand Equity Foundation (IBEF), for 2016 India currently exports approximately USD 36.7 billion worldwide and the prospects for India increasing its exports are high.

The overall result of this is, an increase in exports in the pharmaceutical industry will lower manufacturing cost. Over the last couple of months Jamaica has been able to maintain a relatively stable exchange rate around the USD 1 to JMD 128 mark, if this remains constant then not only will a decrease in the cost of pharmaceuticals be a greater possibility but also the Jamaican economy will be more attractive to investors and preferably Indian pharmaceutical manufacturers for further trade.

Jamaican Importers and Distributor Companies (Pharmaceuticals)

Facey Commodity Group Limited (Facey Commodity)

Facey Commodity is one of the largest distributors of pharmaceutical products in the English-speaking Caribbean with a dominant presence in Jamaica and by extension Trinidad. Facey has been in existence for some 80 years and is ambitious of becoming the leading regional consumer distributor of pharmaceuticals for Jamaica and the Caribbean by engaging in expertise distribution with the addition of new brands for distribution. Currently, the company distributes for leading multinational suppliers such as Roche, pFizer, Limacol, Church & Dwight Co. INC and Boehringer Ingelheim where they supply both prescription and over the counter pharmaceuticals. The company also has 100 percent island wide coverage serving pharmacies, hospitals, general merchandise and convenience stores.

Medimpex Jamaica Limited

Medimpex was first established in Jamaica under the name Medimpex Hungary and opened its first office in 1979. In 1982, the company was re-established where it acquired its now trading name Medimpex Jamaica Limited. The year 1984 is where the company actively took over all the import/export mainly from Hungary to the Caribbean and parts of Latin America. Medimpex boast the experience they have gained over the years working with Hungarian and international pharmacology and as such offer a comprehensive range of world class products. Medimpex was one of the first forerunners to introduce high quality branded generic pharmaceuticals to the Jamaican market.

Cari-Med Ja. Ltd.

Cari-Med limited began its operations in Jamaica in 1986 as a small pharmaceutical distributorship. Car-Med has excelled and has become one of the largest local distributors of pharmaceuticals, medical supplies and consumer goods in Jamaica. Currently, they distribute for 7 out of the major 10 multinational pharmaceutical companies such as Apotex, Novatis, GlaxoSmithKline etc.

Lasco Distributors Ltd.

Lasco distributors Limited was founded over 29 years ago in 1988 by the Hon. Lascelles Chin. The company is currently listed on the local stock exchange and an actively traded company. The Lasco Distributor Pharmaceutical Division was added to the group in 2000 and so far, has been doing exceptionally well. The division distributes for brand name distribution companies such as Astra Zeneca, Bayer Healthcare, Vyser, MSN Laboratories, BSN Medical etc. The company also distributes LASCO branded vitamins and supplements along with a line of generics under the LASMED brand. Lasco is the largest distributor for antiretroviral medications on the island. The company has also gained some success in the distribution of animal care products.

Massey Distribution

The Massy group began over 90 years ago with founder Herbert Donovan Hopwood when he set out to pursue his dreams of owning his own distributor company. In 2001, the Massy Group formally Neal & Massy Holdings Limited which was one of the largest conglomerates in the Caribbean with total sales in excess of USD 400 million acquired 100 percent ownership of HD Hopwood. At present, Massy distribution Jamaica Limited is ISO 9001:2008 certified and is one of the largest distributors and importers of pharmaceutical and consumer products locally. Currently, Massy distributes for Denk PHARMA, Servar, RanBaxy and many others as well as they are licenced to manufacture the Ammens line of medicated powders.

Inter Commercial Distributors Ltd

Inter Commercial Distributors Limited (ICDL) was founded in 1994, the culmination of the dream of four friends operating in different capacities within the pharmaceutical distribution industry. During this time, the introduction of generic drugs to Jamaica was slowly gaining momentum. ICDL began distributing for 2 companies and quickly their distribution grew to fifteen suppliers which includes one local company. The product range includes ethical and over the counter drugs and medical supplies. ICDL is the first Jamaican company to introduce and distribute pharmaceutical products for an Indian company, also the leading supplier of oncology products in Jamaica, the first Jamaican company to introduce a generic Erectile Dysfunction Drug Sildenafil (Aurogra) to the Jamaican market.

Supreme Chemicals Ltd.

Supreme chemicals previously Bunny's was established in 1972, at the time only two products were being produced eucalyptus oil and oil of wintergreen. However, the company planned to manufacture "over the counter" (OTC) pharmaceuticals which then were only imported into Jamaica. On November 13, 1974 Bunny products was incorporated as a limited liability company and was one of the first companies to manufacture (OTC) skin ointments and creams at the international standard while upholding a relatively low purchase price, making it affordable for all. Supreme chemicals added a line supplying household and industrial chemicals in 1981 and subsequently the name change from Bunny's to Supreme Chemicals Ltd. took effect. The range of products expanded to include the manufacturing of generic drugs which were distributed under the name Barrie Pharmaceuticals.

T. Geddes Grant

T. Geddes Grant is one of the largest distributor of generic drugs in Jamaica, the company supplies branded and generic drugs along with other pharmaceutical products to over 400 pharmacies and hospitals including the National Health Fund. A few of the companies that T. Geddes Grant distributes for are Dr Reddy's, Glenmark, Sun Pharmaceutical Industries Ltd, Health 2000, Remedica, Fitzroy, Ziotis, Conair, J. T. Diagnostics, Tudor Rose International just to name a few, supplying both prescription and over-the-counter pharmaceuticals.

MJD Distributors

MJD distributors was established in 1994 by Ms. Juliet Miller (Registered Pharmacist) currently, the company offers a wide range of pharmaceutical, home and healthcare products. Presently, MJD distributes over two thousand (2,000) products island-wide to include medical products, vitamins & minerals, antibiotics ointments, cold preparations, analgesics and disability products just to name a few. The brands they distribute for are Nature's Bounty, Disney, Carex, Apex, Drive & Premier Value. Also, in 1999 MJD was able to secure a partnership with GlaxoSmithKline Caribbean Ltd. to distribute their line of vaccines to doctors across the island.

Ayrtons Distributors Jamaica Company Limited

Ayrtons was established in 1996 as a small private limited company. Currently, they supply pharmacies, hospitals, government agencies, private healthcare providers, local manufacturers, farm stores and supermarkets island wide. The supply consists of generic medications, raw materials or chemicals,

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gums, botanicals and animal care products among other pharmaceuticals. Presently, Ayrtons is the exclusive distributor of the Egyptian Pharmaceutical Industries Co. Ltd. (E.I.P.I.C.O.) branded prescription medicaments since 2006. E.I.P.I.C.O. was established in 1980 and manufactures over 300 generic drugs covering 23 therapeutic groups, exported to over 60 countries in Europe, Africa & Asia the Caribbean.

GlaxoSmithKline Caribbean Ltd

GlaxoSmithKline was established on 1 January 2001 following the merger of GlaxoWellcome plc and SmithKline Beecham plc. The company is a global science-led healthcare company which encompasses of three businesses: research & deliver innovative medicines, vaccines and consumer healthcare products. The annual turnover was £27.9n worldwide for 2016, up to 14% at actual rates and 3% CER and 58% of Group turnover. The Pharmaceutical business includes medicines such as therapy areas, including respiratory and HIV, immune-inflammation, anti-infectives, urology and rare diseases.

Qualcare Ltd.

Qualcare Limited was founded in July 1999, and commenced operations in March 2000. Initially, Qualcare started operations as a distributor of pharmaceuticals and since added consumer products to their products line. The company now maintains a large product profile of over 400 pharmaceutical, consumer and nutraceutical products. Currently, Qualcare, delivers to more than 2000 pharmacies, clinics, hospitals, doctors, shops, service stations and supermarkets with the deployment of their own medical representatives. A few of the companies that Qualcare distributes for are Novatis, Sandoz, Trenka, TS Pharm Ltd. and among others.

Miller Surgical Supplies & Equip Ltd

Miller Surgical & Equip Ltd. was established in November 1976 by Mrs. Verna Miller under the name Armac Limited. Initially, the company distributed hospital supplies and equipment on a fulltime basis starting from 1979. In 1981, the company expanded into supplying surgical equipment and as such the name change was evident to its current name Miller Surgical Supplies & Equip Ltd. In November 1986, the company acquired the Medical and Welding Equipment Division from a divestment of Jamaica Oxygen and Acetylene. By then Miller Surgical Supplies acquired those two operations and expanded to offer a full and extended maintenance service to hospitals and clinics throughout Jamaica.

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In October 2012, the company expanded its product lines to include rehabilitation supplies.

Optimum Trading Ltd

Optimum Trading Limited was established over 20 years ago and is an essential “one stop shop” for all health care products to include medical, dental supplies and veterinary products. Currently, Optimum Trading Ltd. distributes over 4000 products and equipment (small and large) for leading manufactures like 3M, ESPE, Henry Schein, Novocol, Miltex and Rite-Dent, Dentsply, Summit Dental, Biolase, Denterprize and many others.

Uni-Med Health Care Ltd

Uni-Med Health Care Ltd was established in 2008 as a privately owned pharmaceutical distributor with its primary focus to distribute pharmaceuticals, over the counter and consumer products to institutional and community pharmacies, wholesalers in Jamaica and the Caribbean. A few of the suppliers that Uni-Med Health Care Ltd. distributes for are Dornier Med Tech, Serum Institute's vaccines, Master's, F3 and more. Uni-Med Health Care Ltd poises itself as a “one stop multi country pharma marketing solution” for Jamaica and the Caribbean.

New Vision Distributors Limited

New Vision Distributors Limited was Incorporated on the 1st of April 2002 as a small pharmaceutical distributorship. Currently, the company distributes over 80 pharmaceutical products such as neurological, ophthalmic drops, antibiotics, cough syrups, anti-fungal, hypertensive/ cardiovascular, anti-histamines, and vitamins. Distribution is done for four main pharmaceutical companies Allergan Inc., Cadilla Pharmaceuticals, Ipca Laboratories and Flagship Biotech International.

P.A. BENJAMIN

P.A. BENJAMIN was established in the 1870s by Percival Austin Benjamins, a young Jamaican. Mr. Benjamin took great interest in the popular Jamaican practice of using bush teas, herbal medicines and self-medication into what is the oldest drug manufacturing company in Jamaica. In 1879, Benjamins Manufacturing Company Limited - originally called "Benjamins's Jamaica Healing Oil Factory" was stocked with a large array of apothecary's products, soon after the founder recognized the market potential and then decided to expand by sending products overseas to Panama and throughout the Caribbean.

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In 1930 two years after the death of the founder Percival Austin Benjamins, the company was purchased by the firm of Cecil B. Facey. In the late 1950's, the Matalon family who were already established in the local pharmaceutical industry acquired both Cecil B. Facey and P.A. Benjamin. In 1962, P.A.B. along with Cecil B. Facey were incorporated into the newly formed ICD Group of Companies. A few of the popular over the counter pharmaceuticals offered by the company are Benjamins Children Fever & Pain, Diphenhydramine Expectorant, Benjamins Balasm and many more.

DiMed Trading Limited

DiMed Trading Limited was established in April 1998 by the Managing Director, Ms Dian Brown with just two (2) staff members. Initially, the company supplied products to dental practitioners and later expanded to supplying medical and pharmaceutical supplies and equipment. The company has since expanded distribution to include the entire health care field. A few of the brands that they represent are Novocal, Mada International, Greydent USA, Prehma Manufacturing Ltd. and many more.

Mac's Pharmaceuticals

Founded in 1987, Mac's Pharmaceuticals & Cosmetics 05 limited; the company was charged with the task of supplying quality pharmaceuticals that were in demand but were regarded as scarce commodities. Founder, Noel McFarlane and his wife Clover McFarlane focus has been on the manufacturing of antacids, creams, ointments and skin cleansers. Presently, they have expanded into the production of various tablets, capsules and herbal medications maintaining a low sale costs while producing high quality products. At present, Mac's distributes to the Caribbean such as Trinidad, Grenada, St. Vincent, Dominica and the Cayman Islands.

Assessment of Jamaica's potential for increase in Pharmaceutical Importation

The Government of Jamaica has made the policy decision to facilitate an improvement in the access to healthcare facilities across the island as well as to increase access and dispensing of pharmaceuticals to the Jamaican Population.

Under the National Health Fund, the government has made provisions for Jamaicans to access subsidized drugs. The NHF serves as the overarching distributor of pharmaceutical products for public government pharmacies (Drug-Serv pharmacies) in hospitals and clinics. The NHF has agreed on a 100 percent subsidy on pharmaceuticals covered under the NHF Card programme for beneficiaries who are zero (0) to eighteen (18) years old. The Minister of Health Dr. Christopher Tufton in his 2016-17 sectorial debate mentioned that the government will be making efforts to engage with private pharmacies to assist the government in their move to increase access to healthcare and pharmaceuticals across the island. The majority of pharmaceuticals that are supplied to the Jamaican population are imported from overseas markets. Therefore, Jamaica has the potential to increase the number of pharmaceuticals that are imported on the basis that the government intends to improve access and delivery of healthcare and pharmaceuticals.

Swot Analysis



Overall Assessment

India Brand Equity Foundation (IBEF) has predicted growth in the production of pharmaceuticals to USD 100 billion by 2025. As a result, the growth of the industry has risen to USD 36.7 billion in 2016. The Government has put in place several initiatives to encourage the growth of the sector by enhancing research and development procedures to enable the increase of production.

The Government has initiated 'Pharma Vision 2020', geared towards increasing the production of pharmaceuticals as well as to improve the processing and approval time for new facilities and products. The Government plans to coordinate with private Indian pharmaceutical manufacturers such as Piramal Enterprises Ltd, Sun Pharmaceutical Industries Ltd and many others to ensure the success of 'Pharma vision 2020'. This initiative will improve the Jamaican pharmaceutical sector as we would profit from the advanced increase in facilities as well as the research and implementation of new and existing drugs into the market.

Fluctuations of the Jamaican dollar will hamper Jamaica's ability to maximize on the opportunities that will be made available from the expected rise in the production for 2020. The Jamaican Government needs to change their outlook on the processes and procedures required for the importation of pharmaceuticals in Jamaica. Currently, the turnaround time for the registration of new pharmaceutical products is lengthy and often times is a deterrent to pharmaceutical personnel attempting to acquire license for new pharmaceuticals entering the Jamaican market.

The National Health Fund (NHF) is the largest supplier of generic drugs in Jamaica. However, many of the public health facilities and private facilities where generic or affordable drugs are available tends to run short on supply. In order to overcome this issue there needs to be proper inventory and stock control of all the locations in Jamaica to ensure that there is no shortage of pharmaceuticals.

Due to the expected increase in the manufacturing of Indian pharmaceutical products, there is likely to be a decrease in the manufacturing cost of pharmaceuticals.

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An improved trade relationship with India through an increase in trade will result in many opportunities. One such opportunity is medical tourism and other related interest. Alternative medicines and the prospects for its success is also emerging and could likely become a topic for discussion in the near future. This will be beneficial in increasing the Foreign Direct Investments (FDI) to Jamaica as such opportunities are presented.

Jamaica currently has a very high inflation rate at 3.7 percent and often times investors may look at this as a factor to consider before deciding to do business in Jamaica. Jamaica has the potential to grow and with high prospects for medical tourism and alternative medicine with the introduction of the Medical Marijuana Industry Jamaica is poised for growth.

The travel time for pharmaceuticals being shipped from India and other countries to Jamaica is oftentimes lengthy and may contribute to the shortage of drugs in government facilities. The prospect of the Logistics Hub being implemented, will hopefully reduce the wait time for acquiring pharmaceutical stock from overseas markets.

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**Extract drug list for chronic and lifestyle illness distributed under the
National Health Fund (NFH)**

Breast Cancer

Drug	Label	PRSNTN	Country of Origin
ANASTROZOLE	ARIMIDEX TAB 1mg	TAB/CAP	India
CYCLOPHOSPHAMIDE	ENDOXAN-ASTA INJ 1Gm	INJECTION	Germany
METHOTREXATE	EMTHEX TAB 2.5mg	TAB/CAP	Myanmar
PACLITAXEL	CYTAX Inj. 300mg /50ml	INJECTION	India
TAMOXIFEN CITRATE	APO-TAMOX TAB 10mg	TAB/CAP	Canada

Prostate Cancer

BICALUTAMIDE	APO- BICALUTAMIDE TAB 50mg	TAB/CAP	Canada
DOCETAXEL	DAXOTEL INJ. 80mg/2ml	INJECTION	Malawi
FLUTAMIDE	EULEXIN TAB 125mg	TAB/CAP	India
GOSERELIN	ZOLADEX DEPOT INJ. 3.6mg- 1vial	INJECTION	St Kitts- Nevis- Anguilla
LEUPROLIDE	LUCRIN DEPOT INJ. 11.25mg- 1vial	INJECTION	India

ISCHAEMIC HEART DISEASE

AMLODIPINE BESILATE	AMDEPIN TAB 5mg	TAB/CAP	United States
BISOPROLOL	CONCOR TAB 10mg	TAB/CAP	India
CAPTOPRIL	APO -CAPTO TAB 12.5mg	TAB/CAP	Canada
ENALAPRIL MALEATE	INVORIL TAB 5mg	TAB/CAP	United Kingdom
IVABRADINE	PROCORALAN TAB 7.5mg	TAB/CAP	United Kingdom

SICKLE CELL DISEASE

DICLOFENAC SODIUM	DICLOFENAC-S EC-MAC TAB 50mg	TAB/CAP	United Kingdom
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ERYTHROMYCIN ETHYL SUCCINATE	E.E.S TAB 400mg	TAB/CAP	United States
HYDROXYCARBAMIDE	DUREA CAPSULES 500mg	TAB/CAP	India
IBUPROFEN	IBUPROFEN- LAS TAB 400mg	TAB/CAP	Australia
LOSARTAN POTASSIUM	COZAAR TAB 50mg	TAB/CAP	United States
HYPERTENSION			
AMLODIPINE BESILATE	AMDEPIN TAB 5mg	TAB/CAP	India
AMLODIPINE & VALSARTAN	AMLOVAL TAB 5mg/80mg	TAB/CAP	Philippines
ATENOLOL	ATEN TAB 100mg	TAB/CAP	India
BENDROFLUAZIDE	BEZIDE HS TAB 2.5mg	TAB/CAP	Guyana
CAPTOPRIL	APO-CAPTO TAB 12.5mg	TAB/CAP	Canada
DIABETES			
INSULIN GLULISINE	APIDRA INJ.3ml- Single cartridge	INJECTION	United States
METFORMIN HCL	APO- METFORMIN TAB 500mg	TAB/CAP	United States
PIOGLITAZONE	GLITAZ TAB 30mg	TAB/CAP	Malta
REPAGLINIDE	NOVONORM TAB 0.5 mg	TAB/CAP	Turkey
VILDAGLIPTIN	GALVUS TAB 50mg	TAB/CAP	United Kingdom

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