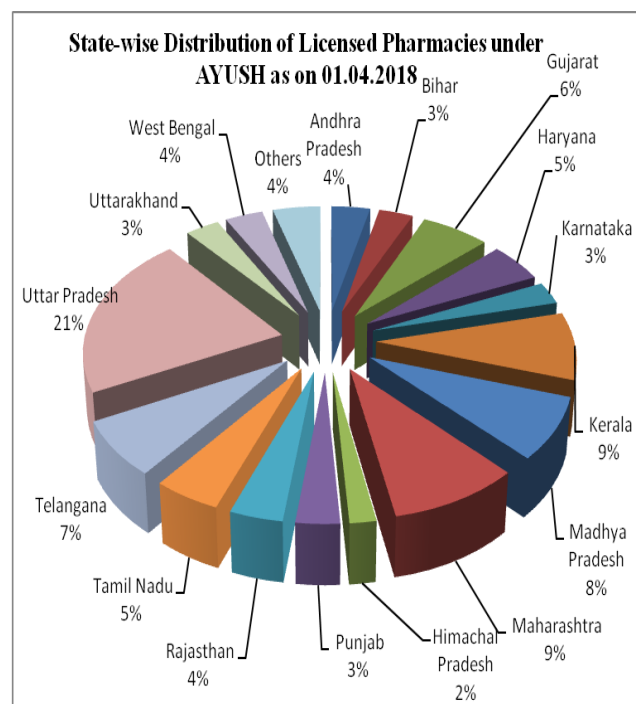
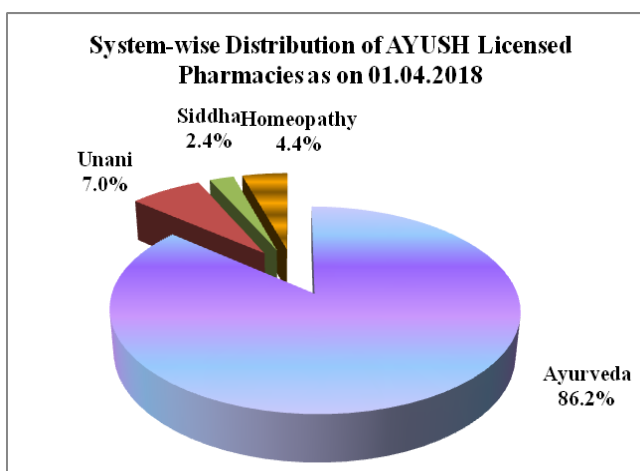


SECTION 5:

LICENSED PHARMACIES UNDER AYUSH

During the recent past, inclination of populace towards AYUSH System of medicine has been observed. To meet the increasing demand of AYUSH medicines, and to provide AYUSH medicines of reasonably good quality, there is a need to have licensed pharmacies for AYUSH medicines with good manufacturing practices. Prior to 2007, Good Manufacturing Practices (GMP) was mandatory for the Ayurveda, Siddha and Unani (ASU) drug manufacturing units only. It was also made mandatory for Homoeopathy in 2007.

As on 01.04.2018, there were 8954 AYUSH drug manufacturing units (licensed pharmacies) in the country. Out of these, 99.5% of the licensed pharmacies were controlled by non-government bodies, and only 0.5% licensed pharmacies were in Government sector. The distribution of total licensed pharmacies of all the four systems Ayurveda, Unani, Siddha and Homoeopathy were 7718, 625, 214 and 397 respectively. System-wise distribution of these units were quite uneven as 86.2% licensed pharmacies belonged to Ayurveda, whereas, 7.0%, 2.4% and 4.4% were under Unani, Siddha and Homoeopathy systems respectively.

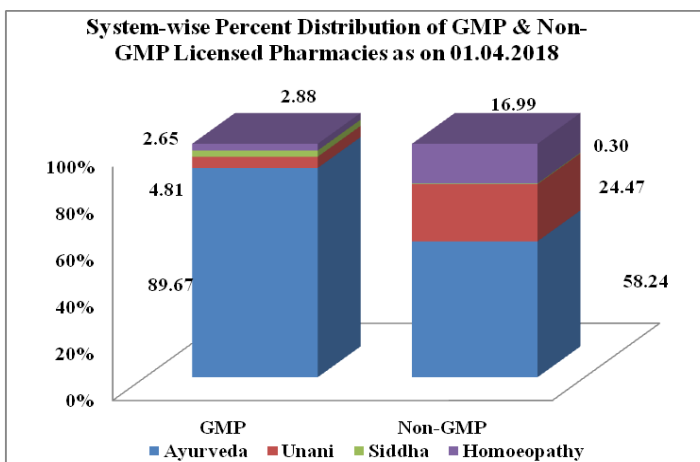


(4.53%).

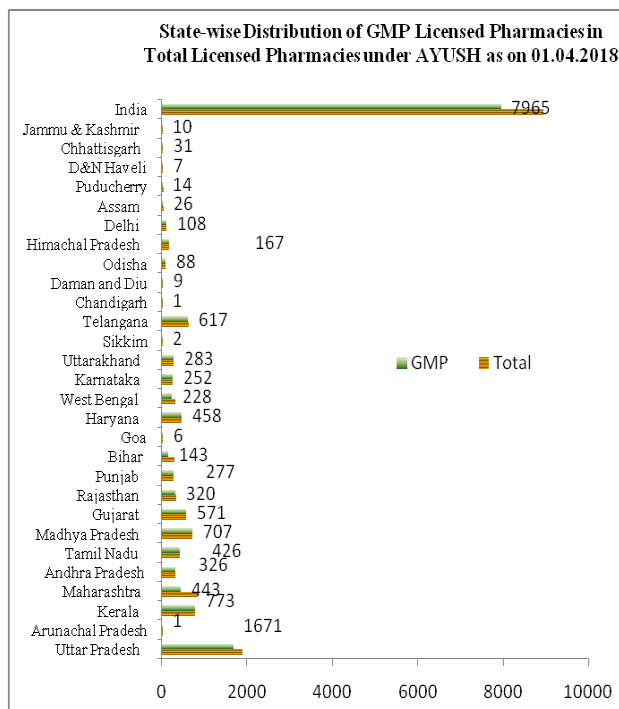
There were 29 states and union territories of the country which have AYUSH licensed pharmacies as on 1.4.2018. No AYUSH drug manufacturing unit have been reported in states of Manipur, Meghalaya, Mizoram and Nagaland and in Union Territories of Andaman & Nicobar Islands and Lakshadweep. Uttar Pradesh has the Maximum number 1898 of AYUSH licensed pharmacies. The states of, Gujarat, Kerala, Maharashtra, Madhya Pradesh, Tamil Nadu, Telangana, Haryana and Uttar Pradesh each were having more than 5% of AYUSH licensed pharmacies. Maximum number of Ayurveda and Unani pharmacies, viz., 1576 and 292 respectively are existed in the Uttar Pradesh. Licensed pharmacies under Siddha systems existed in the states of Tamil Nadu (205), Puducherry (6) and Kerala (3). A majority of Homoeopathy licensed pharmacies 40.30% existed in the state of West Bengal followed by Bihar (12.09%), Maharashtra (9.82%), Telangana (8.56%), Uttar Pradesh (7.55%), and Madhya Pradesh

The States/ UTs of Manipur, Meghalaya, Mizoram, Nagaland, Andaman & Nicobar Islands and Lakshadweep reported to have no licensed pharmacy under any AYUSH system. Besides, there was no Homoeopathy licensed pharmacy in Arunachal Pradesh, Assam, Chhattisgarh, Delhi, Goa, Haryana, Kerala, Punjab, Rajasthan, Sikkim, Uttarakhand, Chandigarh, Dadar & Nagar Haveli and Daman & Diu. Unani licensed pharmacies existed in the states of Andhra Pradesh, Bihar, Delhi, Jammu & Kashmir, Kerala, Madhya Pradesh, Maharashtra, Tamil Nadu, Telangana, Uttar Pradesh, Uttarakhand and West Bengal.

Except Jharkhand, Manipur, Meghalaya, Mizoram, Nagaland, Tripura, A&N Islands and Lakshadweep; rest of the states have pharmacies with Good Manufacturing Practices (GMP). Out of all drug manufacturing units, GMP-compliant units comprised 89% (Non-GMP-compliant units comprises 11%) of the total drug manufacturing units, and within the total GMP-compliant units; 89.67% were Ayurveda drug manufacturing units and only 4.81%, 2.65% and 2.88% were Unani, Siddha and Homoeopathy drug manufacturing units respectively. The states/UTs

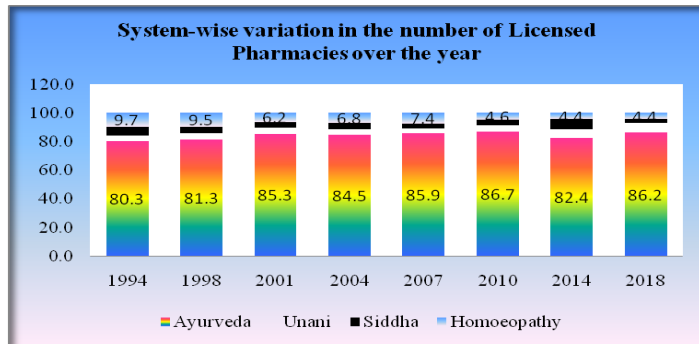


having cent-percent GMP-compliant drug manufacturing units were Andhra Pradesh, Arunachal Pradesh, Chhattisgarh, Delhi, Goa, Gujarat, Haryana, Himachal Pradesh, Kerala, Madhya Pradesh, Punjab, Sikkim, Tamilnadu, Uttarakhand, Chandigarh, D&N Haveli and Daman & Diu. The other states having higher (greater than 75%) proportion of GMP-compliant units were Karnataka,(97.30%), Odisha (98.88%), Rajasthan (94.96%), Telangana (96.86) and Uttar Pradesh (88.04%).



The States/ UTs of Andhra Pradesh, Arunachal Pradesh, Chhattisgarh, Delhi, Goa, Gujarat, Haryana, Himachal Pradesh, Karnataka, Kerala, Madhya Pradesh, Punjab, Sikkim, Tamil Nadu, Telangana, Uttar Pradesh, Uttarakhand, West Bengal, Chandigarh, D&N Haveli and Daman & Diu were having cent-percent GMP-compliant drug manufacturing units under Ayurveda system. Other states which have higher (greater than 90%) proportion of GMP-compliant units under Ayurveda were Odisha and Rajasthan. All Unani drug manufacturing units were GMP-compliant in the states of Andhra Pradesh, Delhi, Kerala, Madhya Pradesh, Tamil Nadu, Telangana, Uttarakhand and West Bengal. All Siddha drug manufacturing units were GMP-compliant in the state of Kerala and Tamil Nadu, Likewise, in the States of Andhra Pradesh, Gujarat, Himachal Pradesh, Madhya Pradesh, Maharashtra, Odisha, Tamil Nadu and Uttar Pradesh all Homoeopathic drug manufacturing units were GMP-compliant.

During the period 1994-2018, the variation in distribution of licensed pharmacies under various systems of AYUSH has been observed. The proportion of Ayurveda licensed pharmacies increased from 80.3% in 1994 to 86.2% in 2018, whereas, proportions of Siddha and Homoeopathy licensed pharmacies decreased from 6.1% and 9.7% in 1994 to 2.4% and 4.4% in 2018 respectively.



A trend of (-)0.08% per annum has been observed in the number of licensed pharmacies under AYUSH systems during the period 1994-2018. An average annual growth rate of 0.17% was realized in Ayurveda pharmacies and in Unani is 1.95%, whereas, Siddha and Homoeopathy pharmacies declined at average annual rates of 1.75% and 3.43% respectively. During 2017-18, the annual growth rate of AYUSH pharmacy industry has decreased by 0.9%. The annual growth rates of 2017-18 in Ayurveda, and Unani have been increased to be 0.3% and 10.2% respectively.
