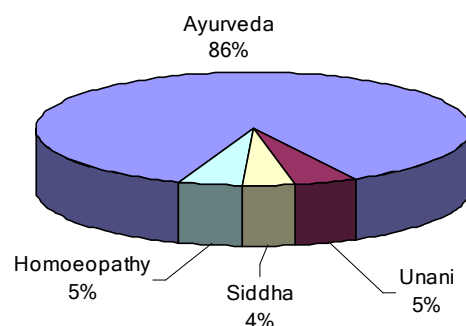


SECTION 5: LICENSED PHARMACIES UNDER AYUSH

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 1.4.2010, there were 8644 AYUSH drug manufacturing units (licensed pharmacies) in the country. Out of these, 99.6% of the licensed pharmacies were controlled by non-government bodies, and only 0.4% licensed pharmacies were in Government sector. System-wise distribution of these units were quite uneven as 86.70% licensed pharmacies belonged to Ayurveda, whereas, 4.79%, 3.91% and 4.60% were under Unani, Siddha and Homoeopathy systems respectively.

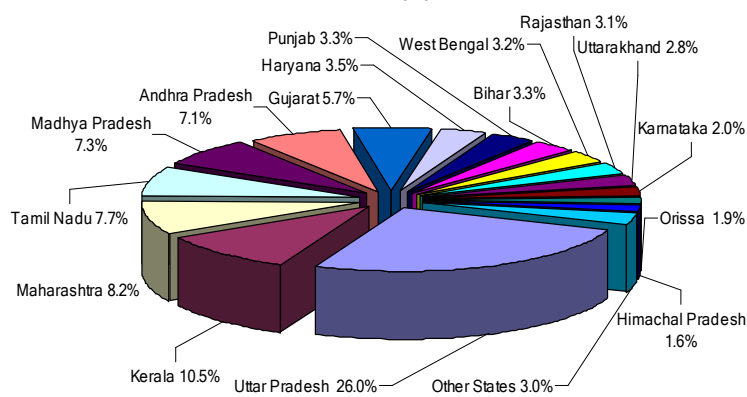
System-wise Distribution of AYUSH Licensed Pharmacies as on 1.4.2010



There were 28 states and union territories of the country which have AYUSH licensed pharmacies as on 1.4.2010. No AYUSH drug manufacturing unit have been reported in states of Arunachal Pradesh, Jharkhand, Manipur, Mizoram, Tripura, and in Union Territories of Andaman & Nicobar Islands and Lakshadweep. Uttar Pradesh has the Maximum number 2247 of AYUSH licensed pharmacies.

The states of Andhra Pradesh, Kerala, Maharashtra, Madhya Pradesh, Tamil Nadu and Gujarat each were having more than 5% of AYUSH licensed pharmacies. Maximum number of Ayurveda and Unani pharmacies, viz., 1974 and 237 respectively are existed in the Uttar Pradesh. Licensed pharmacies under Siddha systems existed in the states of Tamil Nadu 324 Puducherry 10 and Kerala 4 only. A majority of Homoeopathy licensed pharmacies 26.38% existed in the state of West Bengal.

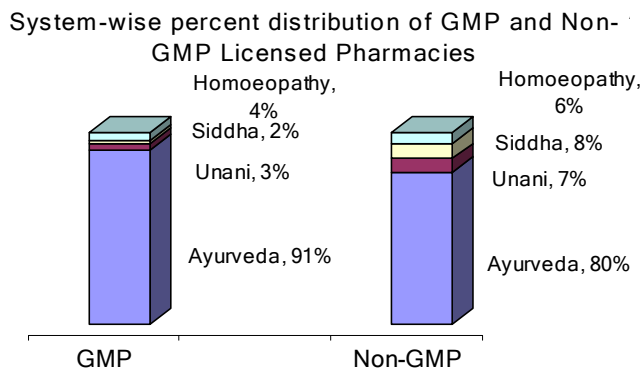
Statewise Distribution of Licensed Pharmacies under AYUSH as on 1.4.2010



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

existed in each of the states/UTs of Meghalaya, Sikkim, Chandigarh for Ayurveda; Karnataka, Kerala for Unani and Assam for Homoeopathy.

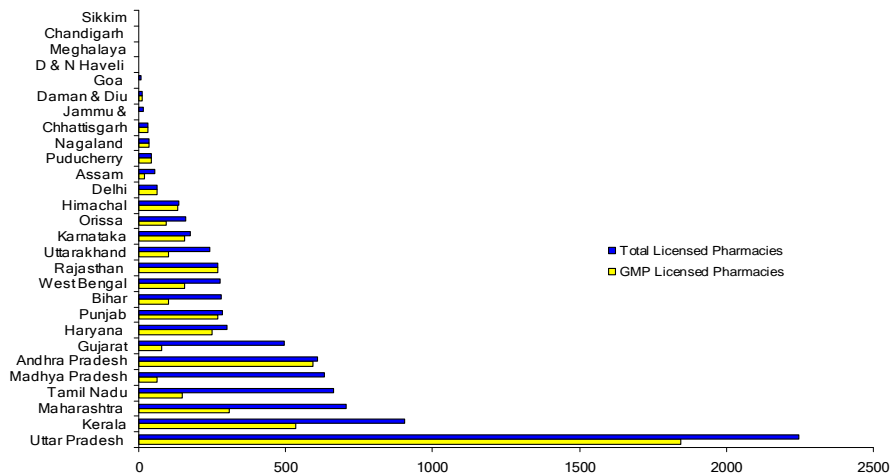
Except Meghalaya, Goa and the seven states mentioned above which had no AYUSH pharmacy, all of the states have pharmacies with Good Manufacturing Practices. Out of all drug manufacturing units, GMP-compliant units comprised 61.4% of the total drug manufacturing units, and within the total GMP-compliant units, 91.2% were Ayurveda drug manufacturing units and only 3.7%, 3.5% and 1.6% were Homoeopathy, Unani and Siddha drug manufacturing units respectively. The states/UTs having cent-percent GMP-compliant drug manufacturing units were Chhattisgarh, Delhi, Nagaland, Rajasthan, Sikkim, Chandigarh, Dadra & Nagar Haveli, Daman & Diu and Puducherry. The other states having higher (greater than 75%) proportion of GMP-compliant units were Andhra Pradesh, Haryana, Himachal Pradesh, Karnataka, Punjab and Uttar Pradesh, whereas, the states / union territories having less than 25% GMP-compliance were Gujarat, Madhya Pradesh and Tamil Nadu, There had been a significant system-wise variation in the proportion of GMP-compliant units, as there were 64.6%, 44.7%, 24.6% and 50.0% GMP-compliant drug manufacturing units under Ayurveda, Unani, Siddha and Homoeopathy systems respectively.



The States/ UTs of Andhra Pradesh, Chhattisgarh, Delhi, Rajasthan, Sikkim, Chandigarh, Dadra & Nagar Haveli, Daman & Diu, Puducherry were having cent-percent GMP-compliant drug manufacturing units under Ayurveda system. Other states which have higher (greater than 75%) proportion of GMP-compliant units under Ayurveda were Haryana, Himachal Pradesh, Karnataka, Punjab, Uttar Pradesh and West Bengal. All Unani drug manufacturing units were GMP-compliant in the states of Andhra Pradesh, Delhi, Haryana, Karnataka, Kerala, Rajasthan and West Bengal. All Siddha drug manufacturing units were GMP-compliant in the states of Kerala and Puducherry, whereas, only 21.3% were GMP-compliant in the state of Tamilnadu. Likewise, in the states of Delhi, Haryana, Madhya Pradesh, Maharashtra, Nagaland, Tamilnadu, Uttar Pradesh and Puducherry, all Homoeopathic drug manufacturing units were GMP-compliant.

During the period 1992-2010, the variation in distribution of licensed pharmacies under various systems of AYUSH has been observed. The proportion of Ayurveda licensed pharmacies increased from 80.8% in 1992 to 86.7% in 2010, whereas, proportions of Siddha and Homoeopathy licensed pharmacies decreased from 4.6% and 9.9% in 1992 to 3.9% and 4.6% in 2010 respectively.

State-wise Distribution of GMP Licensed Pharmacies in Total Pharmacies under AYUSH as on 1.4.2010



A declining trend of 0.036% per annum has been observed in the number of licensed pharmacies under AYUSH systems during the period 1992-2010. An average annual growth rate of 0.4% was realized in Ayurveda, pharmacies, whereas, Unani, Siddha and Homoeopathy pharmacies declined at average annual rates of 0.04%, 0.9% and 4.2% respectively. During 2010, the annual growth rate of AYUSH pharmacy industry has shown 0.9%. The annual growth rates of Ayurveda and Unani pharmacies have been observed to be 3.4% and 3.0% whereas, Siddha and Homoeopathy pharmacies were showing decline by 3.2% and 30.3% during 2010 as compared to 2009.

