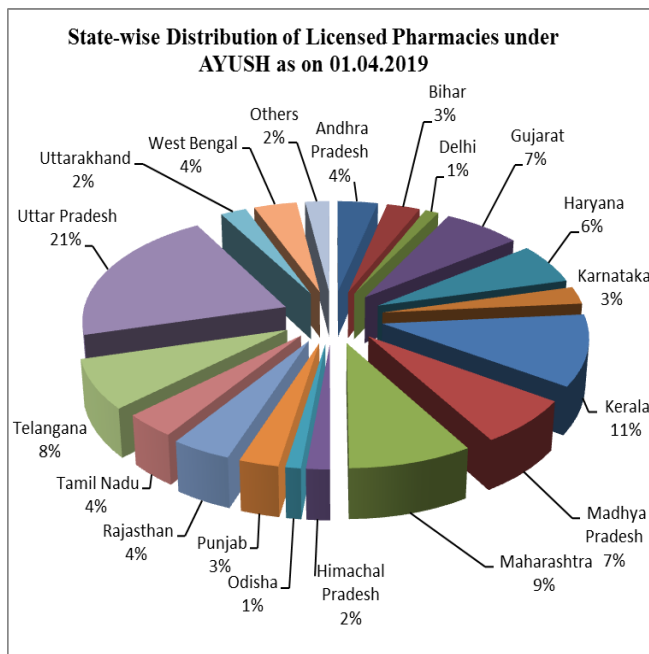
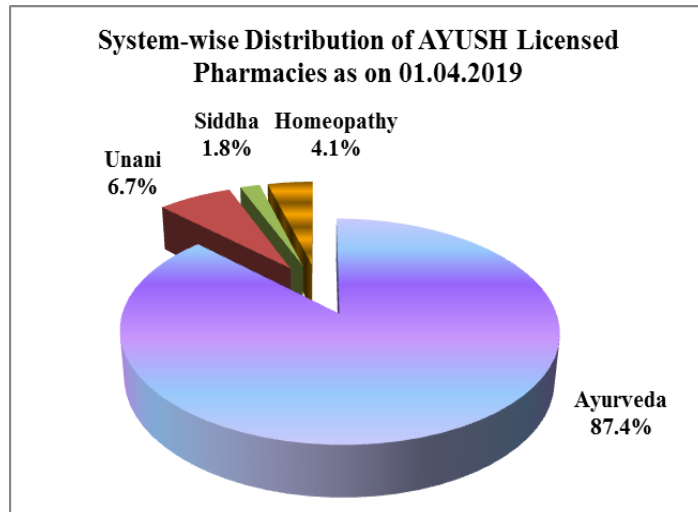


SECTION 5:

LICENSED PHARMACIES UNDER AYUSH

During the recent past, inclination of populace towards AYUSH System of medicine has been observed. To meet the increased 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.

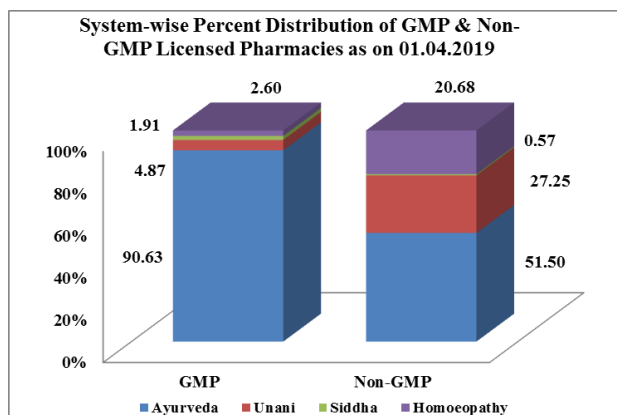
As on 01.04.2019, there are 8407 AYUSH drug manufacturing units (licensed pharmacies) in the country. Out of these, 99.41% of the licensed pharmacies are controlled by non-government bodies, and only 0.59% licensed pharmacies are in Government sector. The distribution of total licensed pharmacies of all the four systems Ayurveda, Unani, Siddha and Homoeopathy are 7345, 566, 151 and 345 respectively. System-wise distribution of these units are quite uneven as 87.4% licensed pharmacies belonged to Ayurveda, whereas, 6.7%, 1.8% and 4.1% are under Unani, Siddha and Homoeopathy systems respectively.



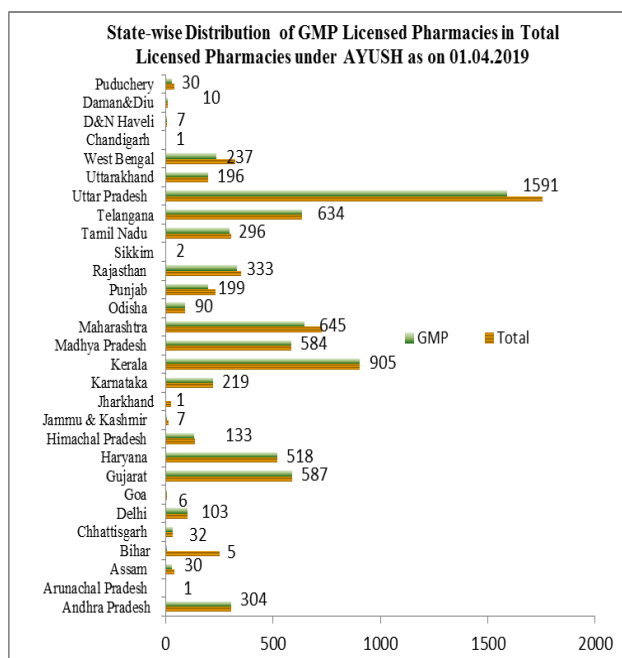
There are 29 states and union territories of the country which have AYUSH licensed pharmacies as on 1.4.2019. No AYUSH drug manufacturing unit have been reported in states of Manipur, Meghalaya, Mizoram, Nagaland and Tripura and in Union Territories of Andaman & Nicobar Islands and Lakshadweep. Uttar Pradesh has the Maximum number 1755 (21%) of AYUSH licensed pharmacies. The states of, Gujarat, Haryana, Kerala, Maharashtra, Madhya Pradesh, Telangana and Uttar Pradesh each are having more than 5% of Total AYUSH licensed pharmacies. Maximum number of Ayurveda and Unani pharmacies, viz., 1416 and 309 respectively are existed in the Uttar Pradesh, whereas, Maximum number of Homoeopathy Licensed pharmacies, viz., 160 are existed in West Bengal. Licensed pharmacies under Siddha system existed in the states of Tamil Nadu (139), Puducherry (8) and Kerala (4) only.

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

Except 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 91.67% (Non-GMP-compliant units comprises 8.33%) of the total drug manufacturing units, and within the total GMP-compliant units; 90.63% are Ayurveda drug manufacturing units and only 4.87%, 1.91% and 2.60% are Unani, Siddha and Homoeopathy drug manufacturing units respectively.



The States/UTs having cent-percent GMP-compliant drug manufacturing units are Andhra Pradesh, Arunachal Pradesh, Chhattisgarh, Delhi, Goa, Gujarat, Haryana, Kerala, Madhya Pradesh, Odisha, Telangana, Uttarakhand, Chandigarh, D&N Haveli and Daman & Diu.

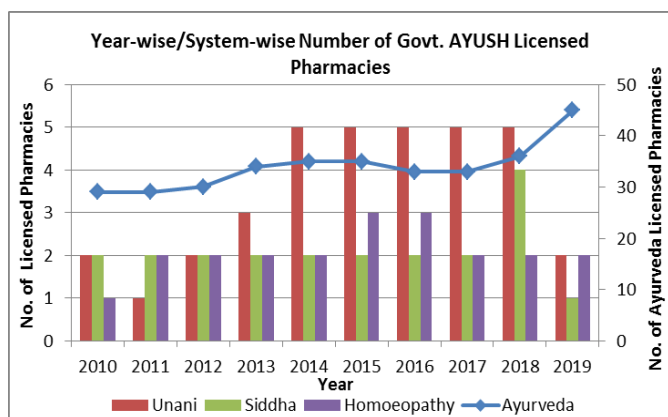


The other states having higher (Equal or greater than 75%) proportion of GMP-compliant units are Assam (75%), Himachal Pradesh (96.38%), Karnataka (98.65%), Maharashtra (88.97%), Punjab (85.77%), Rajasthan (95.14%), Tamil Nadu (97.04%), Uttar Pradesh (90.66%) and Puducherry (75%).

The States/ UTs of Andhra Pradesh, Arunachal Pradesh, Chhattisgarh, Delhi, Goa, Gujarat, Haryana, Kerala, Madhya Pradesh, Odisha, Tamil Nadu, Telangana, Uttar Pradesh, Uttarakhand, West Bengal, Chandigarh, D&N Haveli and Daman & Diu are 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 are Himachal Pradesh (96.21%),

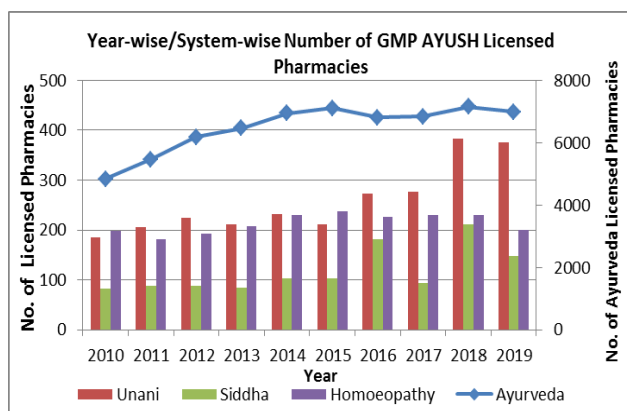
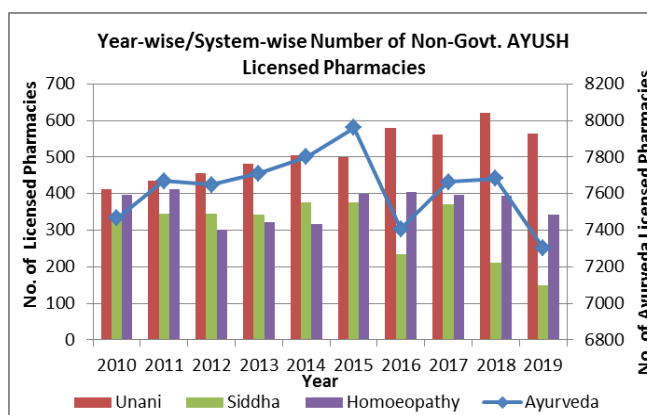
Karnataka (98.57%) and Rajasthan (95.12%). All Unani drug manufacturing units are GMP-compliant in the states of Andhra Pradesh, Delhi, Haryana, Kerala, Madhya Pradesh, Rajasthan, Tamil Nadu, Telangana, and West Bengal. All Siddha drug manufacturing units are GMP-compliant in the state of Kerala and Tamil Nadu, Likewise, in the States of Andhra Pradesh, Gujarat, Himachal Pradesh, Karnataka, Madhya Pradesh, Odisha, Sikkim, Telangana, Uttar Pradesh and Puducherry all Homoeopathic drug manufacturing units are GMP-compliant.

During the period 2010-2019, the variation in distribution of licensed pharmacies under various systems of AYUSH has been observed. The proportions of Ayurveda and Unani licensed pharmacies increased from 86.7% and 4.8% in 2010 to 87.4% and 6.7% in 2019 respectively, whereas, proportions of Siddha and Homoeopathy licensed pharmacies decreased from 3.9% and 4.6% in 2010 to 1.8% and 4.1% in 2019 respectively.



A positive trend of 4.54% per annum has been observed in the number of Govt. licensed pharmacies under AYUSH systems during the period 2010-2019. Maximum average annual growth rate of 12.96% is realized in Homoeopathy Govt. licensed pharmacies whereas, 5.34%, 11.85% and 2.78% are in Ayurveda, Unani and Siddha Govt. licensed pharmacies respectively. During 2018-19, the annual growth rate of AYUSH Govt. licensed pharmacies is 6.38%. Maximum annual growth rate of 25.00% is realized in Ayurveda Govt. licensed pharmacies during 2018-19.

A negative trend of 0.26% per annum has been observed in the number of Non-Govt. licensed pharmacies under AYUSH systems during the period 2010-2019. Maximum average annual declination of 4.29% is realized in Siddha Non-Govt. licensed pharmacies whereas, Unani Non-Govt. licensed pharmacies have increased by average annual growth rate of 3.79%. During 2018-19, the AYUSH Non-Govt. licensed pharmacies have decreased by 6.17%. Maximum annual decrement of 28.57% is realized in Siddha Non-Govt. licensed pharmacies during 2018-19.



A positive trend of 4.38% per annum has been observed in the number of GMP licensed pharmacies under AYUSH systems during the period 2010-2019. Maximum average annual growth rate of 16.38% is realized in Siddha GMP licensed pharmacies whereas, 4.31%, 9.11% and 0.34% are in Ayurveda, Unani and Homoeopathy GMP licensed pharmacies respectively. During 2018-19, the AYUSH GMP licensed pharmacies have decreased by 3.25%. Maximum annual decrement of 30.33% is realized in Siddha GMP licensed pharmacies during 2018-19.

A negative trend of 13.54% per annum has been observed in the number of Non-GMP licensed pharmacies under AYUSH systems during the period 2010-2019. Maximum average annual declination of 17.40% is realized in Ayurveda Non-GMP licensed pharmacies whereas, Siddha and Homoeopathy Non-GMP licensed pharmacies are increased by the average annual growth rates of 31.38% and 2.30% respectively. During 2018-19, the AYUSH Non-GMP licensed pharmacy has decreased by 29.12%. Maximum annual decrement of 37.33% is realized in Ayurveda Non-GMP licensed pharmacies during 2018-19.

