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THE CHANGING STRUCTURE OF PHARMACEUTICAL PRODUCTION IN SOUTH AFRICA

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ABSTRACT

The structure of the South African pharmaceutical manufacturing industry has undergone changes in the last 10 to 20 years.

The purpose of this research is to investigate the changing structure of pharmaceutical production in South Africa. This includes establishing the global and local contributing factors to the changing structure and evaluating the possible implications of the changing structure on the South African pharmaceutical industry and the response of the pharmaceutical industry to these implications. Generally, these factors have resulted in a decline in the number of pharmaceutical manufacturers in South Africa and in particular manufacturing operations owned by multinational companies (MNCs).

Simultaneously, within this period the global demand for generic medicines has increased due to their ability to improve access to affordable medicines. As a result, the supply of medicines in South Africa is being increasingly met by mostly imported generic medicines and to a lesser extent locally manufactured generic medicines. These changes together with a turbulent and sometimes uncertain regulatory environment has led to interesting dynamics and changes within the structure of the pharmaceutical manufacturing industry in South Africa.

Qualitative data was collected through in-depth interviews conducted with stakeholders within the local manufacturing industry using pre-determined questions that served as a guideline for a detailed discussion.

The key findings have been that, despite an apparent decline in the number of pharmaceutical producers in South Africa in recent years, interesting trends appear to be emerging that may be indicative of a sustainable local pharmaceutical manufacturing capacity. This sustainability, however, does appear to rely mainly on government intervention and the successful strategies of the largest generic medicine producers locally. The future viability of the industry largely depends on the ability of the local industry and the government to cooperate and work collectively in achieving their individual mutually beneficial objectives.