

EMBASSY OF THE HASHEMITE KINGDOM OF JORDAN

NAIROBI-KENYA

**STUDY ON THE PHARMACEUTICAL
SECTOR IN KENYA**

BY

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1.0 INTRODUCTION

The Kenyan market is recognized by its imports of pharmaceuticals, which were about 604 million dollars in 2016. These products are exempted from customs duties and value added tax (VAT).

There are about 700 registered wholesale and 1,300 retail dealers in Kenya, manned by registered pharmacists and pharmaceutical technologists.

Kenya is currently the largest producer of pharmaceutical products in the Common Market for Eastern and Southern Africa (COMESA) region, supplying about 50% OF THE REGION'S market. Out of the 50 recognized pharmaceutical manufacturers, approximately 30 are based in Kenya.

Kenyan pharmaceutical activities are mainly production of finished formulations, with some reformulation and development activities. The industry mainly produces generic products (dosage forms of tablets, capsules, creams and syrups), importing APIs, excipients and other raw materials from countries including but not limited to India, China and Germany.

2.0 MAIN MEDICAL AND PHARMACEUTICAL SUPPLIERS

2.1 Main public sector supplier

2.1.1 Kenya Medical Supplies Agency (KEMSA)

The Kenya Medical Supplies Agency (KEMSA) is a state owned medical logistics service provider with the core mandate to procure, warehouse and distribute medical commodities to the public sector. It is the largest purchaser of drugs manufactured locally and imported, buying about 30% of the drugs in the Kenyan market through an open tender system and distributes to over 4,000 public health institutions.

KEMSA has eight regional depots in Eldoret, Garissa, Kakamega, Kisumu, Meru, Mombasa, Nakuru, and Nyeri, which are used mainly as storage depots for overflow commodities when the warehouse in Nairobi is full or in cases when health facilities do not have sufficient storage space. Moreover, both national and local level facilities are by law obliged to first purchase from KEMSA and only if the supplements are not available they are able to source their supplies from other (private) sector distributors.

KEMSA procures medical supplies for County Governments, Referral hospitals, and for programs funded by donors and most tenders run for a 2-year period. KEMSA uses the following four (4) forms of procurement:

1. Open International Tenders: Bidding is open to suppliers worldwide.
2. Open National Tenders: Bidding is open to local Kenyan suppliers only.
3. Restricted Tenders: Bidding is only allowed for selected suppliers.
4. Direct Procurement: Bidding from Government Agencies only.

2.2 Main private sector supplier

2.2.1 Mission for Essential Drugs and Supplies (MEDS)

Mission for Essential Drugs and Supplies (MEDS) is the largest private sector distributor of essential drugs and medical supplies and second largest procuring entity after KEMSA in Kenya. MEDS is a Christian not-for-profit organization and serves as a medical distributor for Faith Based Organizations (FBOs) that are part of the partnership of Kenyan Conference of Catholic Bishops (KCCB) and Christian Health Association of Kenya (CHAK). Previously, only FBO facilities were able to access affordable supplies from MEDS but the organization is slowly taking on a more liberal style and slowly welcoming commercial private sector facilities that serve the lower income earners of the society as well.

MEDS runs annual tenders for most of their procurement, but also have a 3-year tender for some of their supplies. Advertisements and alerts for their tenders are usually found in the daily newspapers (Daily Nation/Standard), via their website as well as their social media platforms. It supplies to over 1,800 public and private health facilities in Kenya as well as 22 health facilities in South Sudan, Ethiopia, Somalia, Democratic Republic of Congo, Malawi, Zimbabwe, Chad and Cameroon.

Table 1.0 Main public & private sector medical & pharmaceutical suppliers' contacts

NAME	TELEPHONE NO.	EMAIL ADDRESS	WEBSITE & SOCIAL MEDIA
Kenya Medical Supplies Agency (KEMSA)	+254 719 033000 +254 20 3922000 +254 726 618520 +254 733 606600	info@kemsa.co.ke	http://www.kemsa.co.ke/ https://twitter.com/kemsa_kenya https://www.facebook.com/KemsaKenya/
Mission for Essential Drugs and Supplies (MEDS)	+254 719086214 +254 719086500	purchase@meds.or.ke	http://www.meds.or.ke/ http://twitter.com/meds_kenya https://www.facebook.com/MEDSKENYA/

Source: KEMSA & MEDS websites

2.3 Other channels of supply/distribution

There are different levels of distributorship depending on the size, capacity and product range. A distributor may choose the following as:-

a) Direct Supply to the Market

- This is a tedious and challenging model of selling pharmaceutical products in Kenya. Many pharmaceutical manufacturers sell their products on consignment basis where they give the drugs to retailers, agents or distributors and then they

are responsible for collecting the money. Unfortunately, some companies have lost money by using this direct method of accessing the market for the products.

b) Through other Distribution Channels

- This method assists the manufacturer/importer in controlling the cash flow. There are only a few Agents/distributors (2 or 3, but not more than 5) which tie up the importer's funds and these are easily collected by the manufacturer/importer's sales people.

c) Strategy for Market Entry

- A company trying to enter into this market can start as a direct importer for his products and then they can appoint distributors/agents to assist in penetrating the market. The only initial capital outlay would be in the cost of a godown, local administration costs and costs related to the few sales personnel that would be hired to promote the products.

3.0 REGULATORY FRAMEWORK IN KENYA

This involves the regulation of Medical Products (Pre-market & Post-market Activities), Profession (Personnel and Practice) and Premise (Licensure) as mentioned below. The Pre-market regulation involves Clinical trials, Registration/Listing of Medical Products and Inspection while the Post-market regulation involves Regulation of Medical Information, Regulation of Imports/Exports, Good Distribution Practice as well as Inspection, Surveillance and Enforcement.

3.1 Clinical Trials

The Pharmacy and Poisons Board as the National Medicines Regulatory Authority, regulates Clinical Trials taking place in the country through the Experts Committee. An applicant needs to fill in the prescribed application form and ensure that all the requirements as indicated in the checklist are met. Subsequently, the committee will strive to review the protocol and provide a response to the applicant within 30 working days as indicated in the Service Charter. Moreover, applicants will be able to submit their applications online, which will improve efficiency in reviewing the proposals as well as tracking the progress.

3.2 Pharmacovigilance

The Department of Pharmacovigilance vision is to develop, implement and continuously upgrade an appropriate system for detecting, reporting and monitoring adverse drug reactions (ADRs) and other relevant problems with medicines in Kenya. The department strives to ensure the safety and efficacy of pharmaceutical products in Kenya. It also carries out routine post market surveillance on all medicines in Kenya.

3.3 Registration/Retention/Variations

The Minister for Health in consultation with the Pharmacy and Poisons Board is empowered by section 44(1) of the Pharmacy and Poisons Act, Cap 244 and misc. Amendments of 2002 to make rules under which medicines may be imported, manufactured for sale or sold in Kenya.

Products liable to registration include those claimed to be useful for any of the following purposes:

- Treating or preventing a disease
- Alleviating symptoms of a disease
- Diagnosing a disease
- Ascertaining the existence, degree or extent of a physiological condition.
- Preventing or interfering with the normal operation of a physiological function whether permanently or temporarily and whether by way of terminating, reducing, postponing, increasing or accelerating the operation of that function, in human beings and animals. For example, substances which can be used as a contraceptive or for inducing anesthesia.
- Blood, blood plasma and blood preparations containing cellular elements of blood.
- Surgical preparations such as catgut, plaster of Paris, bandages and artificial heart valves.

A guideline that is available through PPB presents a common format for presentation of a well-structured application for registration of herbal/complementary medicines.

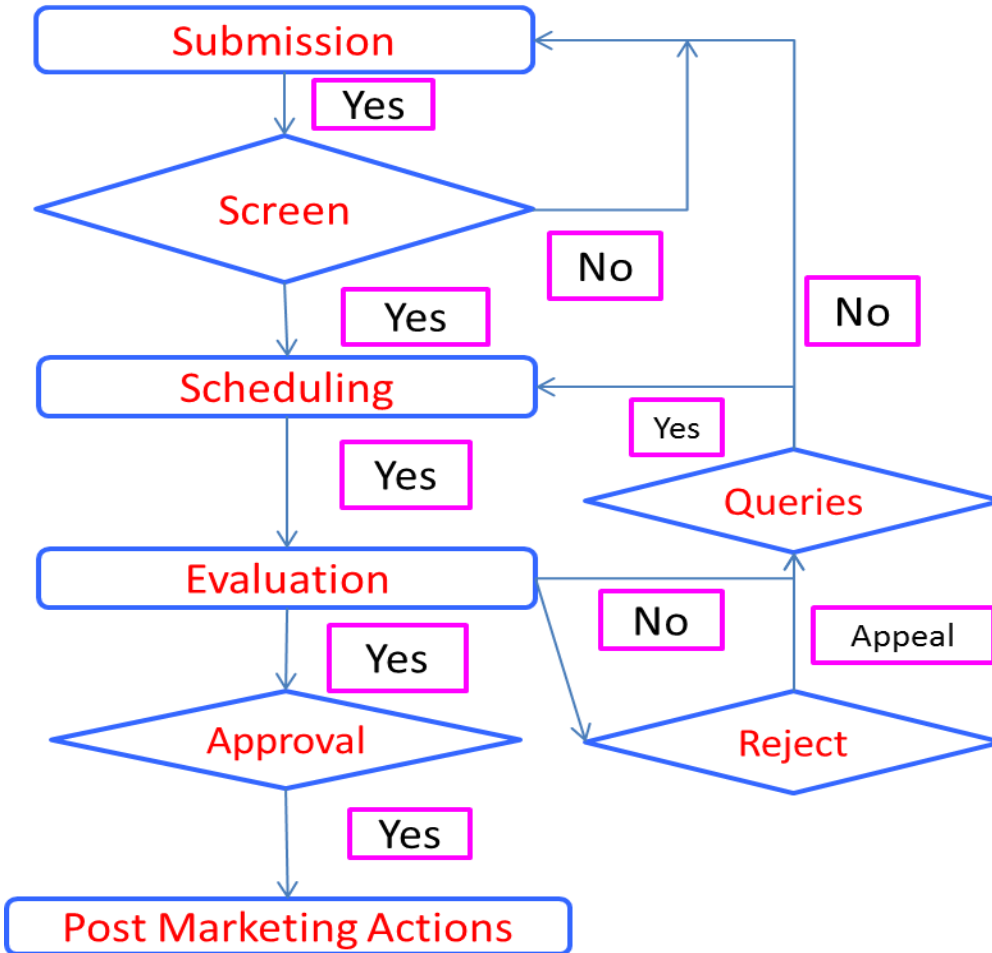
Medical devices regulation is supervised and directed by the Pharmacy and Poisons Board Kenya. Classification, requirements and evaluation of the devices is mainly simulation of rules and regulations recognized by the international regulatory benchmarks, which are mainly:

- The Pharmacy and Poisons Act Chapter 244 of 2002
- Global Harmonization Task Force (GHTF) for Medical Device EU Medical Device Directives 93/42/EEC,
- EU In Vitro Diagnostic Device Directive (IVDD) 98/79/EC and EU Active Implantable Medical Device Directive (AIMDD) 90/385/EEC.
- US FDA (United States Food & Drug Administration)
- Australia TGA (Therapeutics Goods Act)

3.3.1 Marketing Authorization Process

This process involves Screening, Scheduling of Dossiers on First In-First Out (FIFO) basis, Timeline for review within 12 months (Normal drugs) or 3 months (Priority drugs), Processing fees, Response to Queries and Post-Marketing Actions (Annual Retention, Post Market variations & Pharmacovigilance).

Figure 1.0: Medicines authorization process (submission to post-marketing actions)



3.4 GMP (Good Manufacturing Practice)

Conditions for manufacturer registration are as follows:-

- The manufacturer must comply with GMP.
- Each foreign manufacturer shall have one local agent with blanket power of attorney.
- Provision of a free sale certificate from the country of origin or a certificate of a pharmaceutical product.
- A separate application for each product
- Payment of the approved fees
- Certificate issued is valid for a period five years

The application to register a pharmaceutical product should be made by the manufacturer who will bear full responsibility for the relevant information that is given in the application.

However, a domiciled agent who is empowered to plead the manufacturer’s cause before the Pharmacy and Poisons Board may represent a foreign manufacturer in Kenya. This agent must

file a blanket power of attorney, which authorizes him to speak for his principal in all matters relating to the manufacturer’s specialties.

NOTE: A list of Local Technical Representatives (LTR) as approved by the Pharmacy and Poisons Board Kenya is provided as an annex in this document.

The Board reserves the right to verify the Good Manufacturing Practices Compliance of the manufacturer at the applicant’s expense.

3.5 Medicines Registration Information

Drug Information Unit of the Pharmacy and Poisons Board ensures that drug information is unbiased, correct, updated and easily accessible to prescribers and consumers in order to promote rational use of drugs.

This is further enhanced by regulation to control drug promotion and to ensure the information provided by product manufacturers is of good quality. All promotion claims should be reliable, accurate, truthful, informative, balanced, updated, capable of substantiation and in good taste.

NOTE: Please note that all guidelines and/or more information under the Regulatory framework in Kenya mentioned above are available through the Pharmacy and Poison’s Board website below:

<http://pharmacyboardkenya.org/downloads>

3.5.1 Registration of Pharmaceuticals in Kenya

Registration of pharmaceutical supplies depends on the category of the product and the Pharmacy and Poisons Board (PPB) carries out the evaluation within set timeframes.

Table 2.0 Registration of Pharmaceutical Supplies, timelines and Costs

DESCRIPTION	TIMELINES
Priority drugs	3 months
Non-priority drugs	12 months
Evaluation process including site visit to manufacturing plant	2-3 months
Full registration process	Approx. 1.5 years
REGISTRATION	
DESCRIPTION	PRICE (\$)
Registration fee	1,000
Site inspection fees	4,000
Registration analysis	500-1,000
Annual license retaining fees local	150
Annual license retaining fees international	300
TOTAL	5,950 - 6,450

Source: Pharmacy and Poisons Board Kenya and Kenyan Healthcare Sector: Market study report, September 2016

3.5.2 Import regulations

The Pharmacy and Poisons Board (PPB) is responsible for the import of all medical supplies. The current listing price for medical devices and consumables is set at \$100 per product. The GOK charges 16% VAT on all medical devices that are bought and 0.75% on importation (compared to 2% in Tanzania and Uganda).

For pharmaceuticals, no duty or VAT is charged. On medical equipment, it depends what it is and how the customs department views the product. Generally, medical equipment is charged 16% VAT.

4.0 COMMON MEDICINES & THEIR PRICES IN THE KENYAN PHARMACEUTICAL MARKET

Information about the common medicines in the pharmaceutical industry was sourced from relevant health institutions, through face-to-face meetings, health and pharmaceutical reports as well as selected chemists/pharmacies in Westlands, Nairobi Central Business District and South B.

Table 3.0 Main pharmaceutical products classification for essential drugs in Kenya

PHARMACEUTICAL PRODUCTS CLASSIFICATION				
Most commonly imported essential drugs categories in Kenya				
Anti-Viral	Anti-Bacterial	Immunological Agents	Cardiovascular Agents	Anti-Parasitic
Other essential drug categories in Kenya				
Anaesthetic	Analgesics Antipyretics, Nsaid	Anti-Allergics & Drugs Used In Anaphylaxis	Anti-Biotic	Anti-Diabetic
Antidotes & Substances Used In Poisonings	Antiepileptic	Anti-Fungal	Anti-Malarial	Antimigrane Drugs
Vitamin & Minerals	Antiparkinsonism Drugs	Antineoplastic & Immunosuppressive	Anti-Retroviral	Anti-Tbs
Blood Products & Blood Substitutes	Veterinary Products	Dermatological Drugs	Radiological	Disinfectants & Antiseptics
Diuretics	Gastrointestinal Drugs	Hormones, Endocrine Drugs, Contraceptives	Solutions for Water, Electrolyte, Acid- Base Disturbance	Muscle Relaxants
Ophthalmological E.N.T. Preparations	Oxytocic & Antioxytocic	Peritoneal Dialysis Solutions	Psychotherapeuti c Drugs	Respiratory Tract Drugs

Source: Pharmacy and Poisons Board Kenya & World Health Organization- Kenya Essential Medicines List

Table 4.0 Approximate market shares for pharmaceutical products by therapeutic category

Therapeutic Category	Pharmaceutical products	Market Share
Anti-infectives	Antibiotics, antimalarials, sulphonamides, antituberculosis preparations, antiamoebics, antivirals, antifungals, vaccines, sera and immunoglobulins	40%
Products acting on the central nervous system (CNS)	Analgesics and antipyretics, anti-inflammatory agents, hypnotics, sedatives and tranquilizers, anticonvulsants, CNS stimulants, muscle relaxants, antihistamines, antidepressants, anaesthetics, etc	30%
Products acting on the respiratory system	Expectorants and cough suppressants, inhalations, bronchial spasm relaxants, respiratory stimulants, etc	10%
Products acting on gastrointestinal and metabolic disorders	Stomatological preparations, antacids, tonics, hepatic preparations, laxatives, antidiarrheals, insulin preparations, vitamins, mineral supplements, anabolic agents for systemic use, etc -	10%
Other pharmaceutical products	Products acting on the cardiovascular and genitourinary systems, cytotoxins, vaccines, dermatological preparations, ophthalmic drugs, hormonal products, diagnostic and contraceptive agents, etc	10%

Source: Industrial Sector Analysis Report, Ministry of health

4.1 Antibiotics in the pharmaceutical market

According to the World Health Organization (WHO), many drugs in the local health sector, even for most common diseases like pneumonia and diarrhea, are no longer effective forcing physicians to use a more expensive class of medicines called carbapenems, which are not available in most local hospitals. Moreover, some private hospitals in Nairobi say common medicines for treating childhood diarrhea are only effective in 13 out of 100 patients.

A survey by Health Action International (HAI) in 2010 revealed that ciprofloxacin is an essential antibiotic used to treat a wide range of infections including diarrheal diseases, sexually transmitted infections (STI) and opportunistic infections in people living with HIV but many Kenyans cannot afford it. In Kenya, the price for a packet of ciprofloxacin with 10 tablets retails at USD\$ 2 for lowest priced generic and USD\$ 44 for the originator brand as at January 2018.

However, this might vary across different retailers because prices for major antibiotics and other medicines in public health facilities are often subsidized and hence lower than private facilities/chemists.

The most common type of antibiotics used in Kenya include but are not limited to Ciprofloxacin, co-trimoxazole, tetracycline, amoxicillin, cephalixin and erythromycin. However, studies have shown that high prices have kept key antibiotics out of reach for many Kenyans.

4.2 Antivirals in the pharmaceutical market

Antivirals drugs are used to prevent or treat the diseases. They are used to specifically treat viral infections such as HIV, herpes viruses, the hepatitis B and C viruses, and influenza A and B viruses.

Some of the diseases that antiviral drugs treat like HIV/AIDS, which have accounted to a number ranging from 9,000-11,000 deaths per year from 2012-2016.

4.3 Painkillers in the pharmaceutical market

The type of painkillers/analgesics used in Kenya include but are not limited to Panadol, Maramoja, Hedex, Action, Dawanol, Brufen, Aspirin, Feverex, APC, Calpol, Sonamoja, Hedapan, Sonamol, Neladol, Paratal, APCY and Elymol. However, the first five are the most common brands.

Table 5.0 Common painkillers and consumption preferences

FACTOR	DESCRIPTION
Painkillers commonly used in Kenya	Panadol, Mara Moja, Hedex, Action, Dawanol
Awareness	Panadol leads in overall brand awareness (97%)
Competitive imagery build around analgesics	Strength on 'suitability for entire family', 'brand for someone like me', recommendation by doctors and pharmacists', 'modern brand' and 'expert in pain relief'.
Most common advertisement platform and cost	Television, Radio and Print Approx. KSH 1.6 billion
Pain and severity treatment	Most of the brands are highly associated with headaches caused from tension, migraines and colds. Panadol and Sona moja perceived for severe pain while Mara moja and hedex for moderate.
Brand Salience, Promise and Quality	Panadol performs exceptionally well. 7 in 10 consumers of analgesics care very much about their choices of brands for pain relievers and this cuts across age and gender demographics.

Source: Kenya Analgesics Glaxo Smithkline (GSK) presentation

Table 6.0: Price list for the most common Painkillers, Antibiotics & Antivirals (approximate prices in Kenya for the year 2018).

PAINKILLERS						
Type	Panadol 500mg (pack of 100)	Mara Moja (pack of 100)	Dawanol (pack of 100)	Betapyn (pack of 18)	Buscopan (pack of 50)	Olfen 50mg (pack of 20)
Approx. Price \$ (year 2018)	5	4	3	4	10	5
ANTIBIOTICS						
Type	Amoxil Caps 500mg (pack of 100)	Zinnat 500mg (pack of 10)	Augmentin 625mg (pack of 14)	Zithromax 500mg (pack of 3)	Floxapen 500mg (pack of 100)	Erythromycin 500mg (pack of 100)
Approx. Price \$ (year 2018)	21	19	14-17	15	75	79
ANTIVIRALS						
Type	Aciclovir 400mg (pack of 10)	Famciclovir 250mg (pack of 15)	Valaciclovir 500mg (pack of 10)	Valganciclovir 450mg (pack of 10)	Ribavirin 200mg (pack of 84)	Telbivudine 600mg (pack of 28)
Approx. Price \$ (year 2018)	2	164	39	456	161	290

Source: Mater Hospital Pharmacy, South B and Pentapharm Ltd, Tom Mboya Street CBD

5.0 MAJOR DISEASES, MEDICAL TREATMENT AND NUMBER OF REGISTERED DEATHS

Table 7.0 and 8.0 below show number of diseases recorded by health facilities and number of registered deaths caused by these diseases from 2012-2016 respectively.

The diseases that record highest numbers in terms of occurrence (ranging from 1.1 – 20 million yearly) include Malaria, Diseases of the respiratory system, Diarrhoea, Pneumonia, Diseases of the skin and Urinary Tract Infections. Consequently, Malaria, Pneumonia, Cancer, HIV/AIDS and Tuberculosis recorded the highest number of deaths (ranging from 5,000-25,000 yearly).

Table 9.0 shows a list of sample drugs that are commonly used in the treatment of these high occurrence diseases, some of which eventually cause death in the event of insufficient and/or no treatment. The drugs include but are not limited to antibiotics, antivirals, ORS, anti-amoeba, anti-protozoa, anti-diarrhoea, analgesics, antihistamines, antifungals and antimalarial.

Table 7.0 Facility Based Incidence of Diseases in Kenya, 2012-2016

DISEASE	2012		2013		2014		2015		2016*	
	NO.	%	NO.	%	NO.	%	NO.	%	NO.	%
Malaria	9,445,107	24	8,808,471	20.2	9,660,992	20.5	7,663,625	16.7	8,265,823	16.2
Disease of Respiratory System	12,215,993	31	14,823,864	34	17,998,237	38.3	18,264,778	39.8	19,878,330	39
Diseases of the skin (incl. Ulcers)	3,051,026	7.7	3,648,361	8.4	4,556,925	9.7	4,755,915	10.4	4,400,542	8.6
Diarrhoea	2,081,487	5.3	2,226,107	5.1	3,013,256	6.4	3,115,168	6.8	2,883,039	5.7
Intestinal worms	357,844	0.9	349,632	0.8	357,319	0.8	326,297	0.7	762,237	1.5
Pneumonia	1,135,046	2.9	1,282,996	2.9	1,509,851	3.2	1,508,212	3.3	1,612,579	3.2
Accidents (Incl. fractures & burns)	846,287	2.1	927,861	2.1	1,079,953	2.3	1,154,067	2.5	1,303,640	2.6
Rheumatism, Joint pains	845,397	2.1	1,081,245	2.5	1,352,350	2.9	1,474,433	3.2	1,567,576	3.1
Urinary Tract Infections	912,646	2.3	1,091,371	2.5	1,361,275	2.9	1,541,276	3.4	1,688,865	3.3
Eye infection	717,983	1.8	778,073	1.8	1,002,778	2.1	988,183	2.2	1,003,159	2.0
All other diseases	7,781,869	19.8	8,618,536	19.8	5,145,714	10.9	5,112,489	11.1	7,409,579	14.5
TOTAL	39,390,685	100	43,636,517	100	47,038,650	100	45,904,443	100	50,775,369	100

Source: Ministry of Health, Health Management Information System

*Provisional

Table 8.0 Number of registered deaths by major causes, 2012-2016

CAUSES	2012	2013	2014	2015	2016*
Malaria	24,772	23,789	22,948	20,691	16,000
Pneumonia	22,051	22,918	21,640	22,473	21,295
Cancer	12,574	13,720	14,175	15,714	15,762
HIV/AIDS	11,111	11,448	12,235	11,131	9,471
Tuberculosis	10,611	11,186	10,986	10,183	4,735
Anaemia	8,169	8,124	8,469	8,472	8,165
Road traffic accidents	4,997	4,942	4,710	5,488	4,809
Other accidents	4,630	4,857	4,187	3,887	4,166
Heart disease	5,188	4,544	5,030	5,799	5,353
Meningitis	4,480	4,265	4,555	4,499	4,374
Others	79,234	84,539	89,676	91,868	96,507
TOTAL	189,829	196,345	200,625	202,220	190,637

Source: Civil Registration Service

5.1 Price list for drugs

After conducting field visits that included key informant interviews and formal meetings with pharmacists from the below mentioned pharmacies;

1. Goodlife Pharmacy-Westlands,
2. New Lumuma Pharmacy Ltd-Tom Mboya Street CBD,
3. Doveypharma Pharmaceuticals-Westlands,
4. Malibu Pharmacy-Moi Avenue Street CBD &
5. Flame Tree Pharmacy Ltd-The Mall Westlands,

A price list for drugs used to treat common diseases affecting Kenyans was obtained as illustrated in table 9 below.

Table 9.0 Price list sample for drugs used for treating most common diseases in Kenya, year 2018

NO.	DISEASE	APP.AV NO.OF PATIENTS 2012-2016	CATEGORY OF DRUGS	COMMON DRUGS	APPROX. PRICES \$ (year 2018)
1.	Malaria	8.8 million	Antimalarials	ACTM (pack of 24)	2
				Duo-cotexcin (pack of 9)	5-6
				P.Alaxin (pack of 9)	4
				Mephaquin (pack of 4)	13
				Artefan(pack of 24)	2
				Lonart-ds (pack of 4)	4
2.	Disease of the Respiratory System (including Pneumonia)	16.6 million	Antibiotics, Cough syrups, Analgesics, Antihistamines	Cefuroxime 500mg (pack of 100)	25
				Amoxicillin 500mg (pack of 100)	21
				Augmentin 625 (pack of 14)	14-17
				Cephalexin 500mg (pack of 3)	2
				Ampiclox 500mg (pack of 3)	2
				Clavulin 625mg (pack of 14)	11
				Septrin 960mg (pack of 3)	1
				Actified cough syrup	5
				Paracetamol 1000mg (pack of 8)	4
				Celestamine (pack of 30)	6
3.	Diseases of the skin	4.1 million	Antifungals for fungal infections, application creams for chicken pox & acne	Acnesol cream	3
				Fluconazole 200mg (pack of 5)	3
				Griseofulvin 500mg (pack of 5)	3
				Clotrimazole cream	3
				Miconazole cream	2
				Terbinafine cream 15g	13
				Calamine lotion	1
4.	Diarrhea	2.7 million	ORS, Anti-amoeba, Anti-protozoa, Anti-diarrhoea	Imodium capsules (pack of 6)	3
				Cipro-T 500mg (pack of 6)	3
				DTS-Kit (ORS)	1
				Flagyl 400mg	2
5.	Intestinal worms	431 thousand	Anthelmintics	Vermox 1 tablet	6
				Zentel 1 tablet	3
6.	Urinary Tract Infections	1.3 million	Antibiotics	Ciprofloxacin 400mg (pack of 10)	2
				Levofloxacin 750mg (pack of 10)	10
				Doxycycline 100mg (pack of 10)	1

Table 10.0 Leading Pharmaceutical Importers in Kenya

NAME	TELEPHONE NO.	EMAIL & WEBSITE
Apple Pharmaceuticals Ltd/ Rup Pharm Ltd Dr. Raj Vaghella – Director	+254 722 526434 +254 774 907401 +254 702 198167	Email: ruppharm@lifescienceske.org Email: apl@lifescienceske.org
Pasaiba Tourmaline Ltd Mr. Amos Mong'ony	+254 718 315266	Email: amos@pasaiba.com Website: www.pasaiba.com
Goldlife Pharmaceuticals Ltd Mr. Elias Kamau Wamuti Mr. Felix Oteba Olubai	Mr. Elias : +254 721 946 560 Mr. Felix : +254 720714633	Email: ewamuti@yahoo.com Email: olufelix1998@gmail.com
Dawa Pharmaceuticals Ltd Dr. Raju Mohindra – Chairman Mr. Narotam Juneja - CEO	+254 733 764747	Email office: info@dawalimited.com Chairman: raju@mediselkenya.com CEO: juneja@dawalimited.com Website: http://dawalimited.com/
Medisel Kenya Ltd Mr. Aswani Kalpushu – CEO	+254 733 552664	Email office: info@mediselkenya.com CEO: kalpushu@mediselnairobi.com Website: http://www.mediselkenya.com/
Cosmos Pharmaceuticals Ltd Mr. Prakash. K. Patel – Chairman/ Managing Director	+254 722 864000 +254 733 666834	Email: admin@cosmos-pharm.com Website: http://cosmos-pharm.com/
Harleys Limited Mr. Asvin Kumar Haria- CEO	+254 722 202030 +254 737 203030	Email PA: anjana@harleysltd.com Email: customercare@harleysltd.com Website: http://www.harleysltd.co.ke/
Omaera Pharmaceuticals Ltd Dr. Njoroge Keige - CEO	+254 728 970777 +254 717 381822	Email: omaera@africaonline.co.ke Website: http://www.omaera.com/
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Beta Healthcare International Ltd Dr. Sanjay Advani-CEO	+254 724257072/073 +254 735 992699 +254 735 992599	Email: info@ke.betashelys.com Website: http://www.betacare.co.ke/
Alpha Medical Manufacturers Dr. Shashi Badiani-CEO & founder	+ 254 721 504000 + 254 734 785363 + 254 752 323398	Email: admin@alphamedicalafrica.com Website: http://alphamedicalafrica.com/
Medionics Healthcare Ltd Dr. S K Arimi- Director	+254 712 886148 +254 020 4453300	Email: info@medionics.co.ke Website: www.medipharm.co.ke
Saicare Enterprices Ltd Patel Pankaj- Pharmacist	+254 788 777775 +254 787 899605	Email: saicare@saicare.co.ke Email: saicare2010@yahoo.com
Njimia (K) Ltd Dr. Daniel Wachira- CEO	+254 790 484776 +254 790 484771	Email: njimiakenya@gmail.com Email: info@njimiakenya.co.ke Website: https://njimiakenya.co.ke/

Source: Kenyan Healthcare Sector: Market study report, September 2016, East African Chamber of Commerce, Industry & Agriculture (EACCIA), 2018 and Internet sources

Table 11.0 Key stakeholders in the Kenya pharmaceutical sector

Key stakeholders in the Kenya pharmaceutical sector	
1.	Ministry of Health (MOH)
2.	Kenya Medical Association (KMA)
3.	Kenya Health Federation (KHF)
4.	Pharmacy and Poisons Board (PPB)
5.	Federation of Kenya Pharmaceutical Manufacturers (FKPM)
6.	Kenya Medical Supplies Agency (KEMSA)
7.	The Mission for Essential Drugs Supplies (MEDS)
8.	Pharmaceutical Society of Kenya (PSK)
9.	Kenyan Association of Private Hospitals (KAPH)
10.	Association of Social Franchising for Health (ASFH)
11.	Kenya Bureau of Standards (KEBS)
12.	Kenya Medical Laboratory Technicians and Technologists Board (KMLTTB)
13.	Kenya Association of Pharmaceutical Industry (KAPI)
14.	Kenya Private Sector Alliance (KEPSA)
15.	Kenya Medical Research Institution (KEMRI)
16.	National Drug Quality Control Laboratory (NDQCL)
17.	Nursing Council of Kenya (NCK)
18.	Kenya Medical Practitioners and Dentist Board (KMPD)
19.	Kenya Nutritionists and Dietetics Institute (KNDI)
20.	Clinical Officers Council (COC)

Source: Kenyan Healthcare Sector: Market study report, September 2016

6.0 NOTES & RECOMMENDATIONS

1. No Customs' duties or Value Added Tax (VAT) on pharmaceutical products is charged in Kenya. Therefore, there is a good opportunity and market for Jordan to successfully penetrate and compete in the pharmaceutical industry. This is as long as Kenya continues spending about 8% of its GDP on health including pharmaceutical products and pharmaceutical imports keep increasing from above 604 million USD in 2016.
2. The Annex below contains a list of Local Technical Representatives (LTRs) with their respective contact details. They are approved by the Pharmacy and Poisons Board (PPB) Kenya and act as domiciled agents empowered to plead the local or foreign manufacturer's causes before the Board. Jordan manufacturers can therefore take advantage of this list by identifying the most suitable agents to assist them in penetrating the Kenyan market from registration to marketing of their products.
3. The number of patients in Kenya from 2012 to 2016 has been fluctuating on a range of 39-50 million patients recorded per year for various diseases including Malaria and diseases of the respiratory system which record highest number of patients as illustrated in Table 7.0. These high numbers clearly indicate the need for better healthcare in Kenya.
4. The Kenya Health Sector needs quality medicines for the following diseases:
 - Malaria,
 - Diarrhea
 - Intestinal worms
 - Diseases of the skin
 - Urinary Tract Infections
 - Diseases of the respiratory system

These diseases had an average no of patients during 2012-2016 equal to 34 million patient yearly, Table 9.0 illustrates the types and prices of medicines used in the treatment of these diseases. So Jordanian products can be an alternative for the treatment of the above-mentioned diseases.
5. Table 6.0 is a price list for the most common Painkillers, Antibiotics & Antivirals approximate prices in Kenya for the year 2017. In this regard, Jordanian products also can be an alternative for the mentioned drugs.
6. Kenya hosts about 42 pharmaceutical manufacturers and less than a handful of medical supplies manufacturing plants. The focus on investment therefore should be investing in a manufacturing plant(s) and/or finished medical products, as there is an opportunity to thrive in either or both.

7. The Kenya health sector needs quality and affordable medical devices like western standard therapeutic and diagnostic equipment as well as supplies which include but are not limited to:-
- Syringes
 - Non-woven products such as masks, hair nets, gowns, etc.
 - Catheters such as suction, feeding, etc.
 - Assembly of rehabilitation products such as wheelchairs, crutches, etc.
 - Bandages and plasters using locally available raw materials i.e., cotton
 - Infusions and infusion products
 - Other medical diagnostics products such as malaria kits, HIV kits
 - Latex products i.e., condoms and gloves
 - Dialysis and all nephrology equipment
 - Cardiac and related accessories
 - Radiology diagnostic equipment (e.g. CT scans, MRI Scans, ultra-sounds)
 - Oncology (radio therapy delivery equipment e.g. linear accelerators)

7.0 ANNEX: List of Local Technical Representatives approved by PPB Kenya

NO.	NAME OF LTR	TELEPHONE NO. (+254)	EMAIL ADDRESS
1.	AB Pharmaceuticals Ltd	720-606272 / 722-722576	abpharmakenya@gmail.com
2.	Abacus Pharma (A) Ltd	731-262020 /770-901090 /722-901090	abacus.nrb@kibokogroup.com
3.	Accord Healthcare (K) Ltd	020-2492448/449/ 2699799, 3751439	accordkenya@africaonline.co.ke
4.	Ace Pharmaceuticals Ltd	020 2711228 /722721652	info@acepharm.co.ke
5.	Adcock Ingram E.A. Ltd	020-2510601/2/701-333756/731-660010	info@adcock.com
6.	Aglowmed E.A. Ltd	20 3750312	aglowmed@aglowmed.com
7.	Agrilords Ltd	203748436/ 203521685	info@Agrilords.com
8.	Asterisk Solutions Limited	722 205103/ 728 969652/ 738 224433	asterisk@asterisk.co.ke
9.	Autosterile (EA) Limited	020-2329481/ 701-016791/ 724-256070	info@AutosterileEA.biz
10.	Bayer East Africa Ltd	20 8600000	info.ke@bayer.com
11.	Bel-Ea Pharmacy Ltd	2219497/734748105/ 721700098	info@beleapharmacy.co.ke
12.	Beta Healthcare International Ltd	724 257072	info@ke.betashelys.com
13.	Bimeda Ltd	20 6537622-6	mmsanya@bimeda.com
14.	Biodeal Laboratories Ltd	020-2015228/ 720 333829/ 734 333829	info@biodeal.co.ke
15.	British Pharmaceuticals Limited	720-572553/ 07-900423	info@britishpharmaceuticals.co.ke
16.	Cadila Pharmaceuticals East Africa Limited	722-509988/ 731-786006	cadila@swiftkenya.com
17.	Caroga Pharma(K) Ltd	720-649130	info@carogadx.com
18.	Comet Healthcare Ltd	725-519844/ 726-129448	comethealthacares@gmail.com
19.	Cooper K-Brands Ltd	20 4206000/ 722 209 840/734 330 044	info@coopers.co.ke
20.	Cosmos Limited	733666834/ 722864000	admin@cosmos-pharm.com
21.	Crown Healthcare	20375 0000	crown@crowkenya.com
22.	Dafra Pharma Ltd	710-953535/ 722-494276/ 733-232198	paul.gaithe@dafrapharma.com
23.	Dawa Ltd	733 764747	raju@mediselkenya.com
24.	Dentmed Ltd	20-4445307/ 722 965 349/ 734 942 671	info@dentmedkenya.com
25.	Eagle Vet Kenya Ltd	020-2018562	info@eaglevetkenya.co.ke
26.	Elys Chemical Industries Ltd	020-650503-10/ 20 2585031/2/3/4	elys@africaonline.co.ke
27.	Europa Healthcare Ltd	20-2240614/ 722 206 200	europa@nbi.ispkenya.com
28.	Galaxy Pharmaceutical Limited	020-3748551/2/3/4 / 722-714617	info@galaxypharma.co.ke
29.	Generics Africa Ltd	20 2010103/	info@genericsafrica.com
30.	Glaxosmithkline Pharmaceutical Kenya Ltd	20-6933200/ 20-6534241/724255402	john.k.muthanie@gsk.com
31.	Glenmark Pharmaceuticals (K) Ltd	020-2485039/ 722-206070	info@glenmarkkenya.co.ke
32.	Globe Pharmacy Ltd	775 222333/ 020-2220700	globe@globe.co.ke

NO.	NAME OF LTR	TELEPHONE NO. (+254)	EMAIL ADDRESS
33.	Goodman Agencies Ltd	20 4446684	info@goodman.co.ke
34.	Gujarat Liqui Pharmacaps Pvt Ltd	20 6520374	viju_seema@yahoo.com
35.	Harleys Ltd	722 202030	customercare@harleysltd.com
36.	Highchem Marketing Ltd	20-3546486/93 / 722 205 174	pharmaceuticals@highchem.co.ke
37.	Highridge Pharmaceuticals Ltd	020-3741875/37555005/ 724-256865	info@highpharm.co.ke
38.	Holley Cotec Co. (E.A) Limited	20 520 373 1	info@holleycotecafrica.com
39.	Imperial Health Sciences Kenya Ltd	20 202 5860	queriesch@ihs.za.com
40.	Inkamed Pharmaceuticals Ltd	20 2727593/ 202213369/ 20557855	info@inkamed.com
41.	Isis Pharmaceutical Ltd	706-231236	info@pharmaceuticals.co.ke
42.	Ivee Aqua Epz Ltd	45-6622580/1 / 020 2413493	iveeaqua@ivee.co.ke
43.	Ivee Infusions Epz Ltd	733 766765	kalpa@ivee.co.ke
44.	Kenpharma Healthcare Ltd	726 005 075	info@kenpharma.co.ke
45.	Kentons Limited	057-2024933/ 057-2022340/ 725555666	sales@kentons.net
46.	Kulal International Ltd	020-550330/1 / 722-209755	sales@kulal-international.com
47.	Laboratory & Allied Ltd	20 804 0306/ 20 233 7478/ 20 804 0304	info@laballied.com
48.	Laborex Kenya Ltd	020-6939000/ 722-203000/ 733-333888	info@laborex-kenya.com
49.	Lords Healthcare Ltd	020 2717111-15/722-204443/733-617111	lords@swiftkenya.com
50.	Macnaughton Ltd	20 2603464/ 722209698/ 735337629	admin@macnaughton.co.ke
51.	Madawa Pharmaceuticals Ltd	020-2710634/ 722-721652	info@madawa.co.ke
52.	Makupa Chemists	041 2492808	info@microlink.co.ke
53.	Medisel Kenya Ltd	711 994 714/ 733552 664	kalpushu@mediselnairobi.com
54.	Medivet Products	020-3534418/ 733 723266	info@medivetpl.com
55.	Medox Pharmaceuticals Limited	020-4400267/8/9 / 722-206261	info@medox.co.ke
56.	Metro Pharmaceuticals Ltd	020-2224497/ 733-607273/ 720-416475	metro@africaonline.co.ke
57.	Murphy Chemicals (EA) Ltd	722-570768/ 733-610860	murphy@murphychemicals.co.ke
58.	Nairobi Enterprises Ltd	020-2323578-9/ 702-967300/ 733-967300	info@nelent.com
59.	Nairobi Pharmaceuticals (K) Ltd	772 767585/ 020 222 8014	npkl2003@hotmail.com
60.	National Pharmacy Ltd	718-569085/ 770-353234	info@nationalpharma.co.ke
61.	Nextgen Pharmaceuticals (K) Ltd	701-417491/ 791-578060	salauddin@nextgenpharma.co.ke
62.	Nila Pharmaceuticals Ltd	020-2216457/ 721-427832/ 722-871488	nila@nilapharm.com
63.	Omaera Pharmaceuticals Ltd	728 970777	omaera@africaonline.co.ke
64.	Opera Pharma (K) Ltd	020-2619950/ 737-786876/ 705-235240	info@operapharma.com
65.	Orange Pharma Ltd	705 957575/ 737957575	info@orangepharma.org

NO.	NAME OF LTR	TELEPHONE NO. (+254)	EMAIL ADDRESS
66.	Pan Pharmaceuticals Ltd	020-4443057/8 / 722-538888	sales@panpharmaceuticals.co.ke
67.	Pharm Access Africa Ltd	20 3743295/6 / 722 209494	info@pharmaccessafrica.com
68.	Pharma Plus Kenya Ltd	786 714224	info@pharmapluspharmacies.co.ke
69.	Pharma Specialities Ltd	020-3569521/22/23/ 733-699905	psl@phillipskenya.com
70.	Pharmaceutical Manufacturing Co (K) Ltd	20 559272/ 724133735/ 206556455	pmc@africaonline.co.ke
71.	Pharmaco Healthcare Ltd	722 411 627/ 780 724 506	info@pharmacohealthcare.com
72.	Pharmaken Ltd	020-2343454/ 726-849861/ 736-895122	msa@pharmaken.net
73.	Pharmasell Ltd	20-2623805/ 700 651294/ 722 742 492	info@pharmasell.co.ke
74.	Phillips Pharmaceuticals Ltd	020-3569500/1/2/3/ 733-612000	info@phillipskenya.com
75.	Prodigy Healthcare Ltd	20 2622010/ 700 709066/ 733 342820	info@prodigyhealthcare.co.ke
76.	Psm Pharmaceuticals Ltd	020-4452506/7/ 735-999383/ 733-602439	info@psmpharma.co.ke
77.	Raa Limited	734 756071/ 722202971	sales@raalimited.com
78.	Radiance Pharmaceuticals Ltd	722-842823/ 711-638779/ 788-486623	info@radiancepharma.co.ke
79.	Ray Pharmaceuticals Ltd	720 333829/ 734333829	info@raypharm.co.ke
80.	Reckitt Benckiser Services(Kenya) Ltd	020 4299000/ 734 204 145/ 20 429 9133	aseem.soni@reckittbenckiser.com
81.	Regal Pharmaceuticals Ltd	20 8564211/ 722202389	info@regalpharmaceuticals.com
82.	Ripple Pharmaceuticals Ltd	722 627 487/ 735 627 487	info@ripplepharma.com
83.	Sai Pharmaceuticals Ltd	733 741 911/ 20 4454301/ 721 243 322	info@saipharm.com
84.	Salama Pharmaceuticals Ltd	750-221189/ 751-123594	sales@salamapharmaceuticals.com
85.	Signature Healthcare Ltd	705 617118/ 787 617118/ 770 374029	info@signaturehealthcareltd.com
86.	Simba Pharmaceuticals Ltd	020-4452449/ 716-639225/ 735-639225	info@simbapharma.co.ke
87.	Skylight Chemicals Ltd	735 603 946/ 700 176 672	info@skylightchemicals.co.ke
88.	Statim Pharmaceuticals Ltd	020-3741988/9/ 722-768151	info@statim.co.ke
89.	Summit Pharmaceuticals Limited	20-604771/ 72251414	summitpharm@gmail.com
90.	Surgilinks Ltd	20 651465/6/7/8/ 722 204929	info@surgilinksltd.com
91.	Surgipharm Ltd	020-3749304/ 722-204707/ 734-224228	info@surgipharm.com
92.	Syner-Chemie Ltd	734-801123	synchem@nbnet.co.ke
93.	Synermed Pharmaceuticals (K)Ltd	020-8155282 / 83 / 84 / 85	info@syner-medkenya.com
94.	Tata Africa Holdings (K) Ltd	722 208819/ 20 2604328/30/31/32	lily.mulusa@tatainternational.com
95.	Twokay Chemicals Limited	020-2211011/ 733-767138/ 714-687727	twokay@bidii.com
96.	Umoja Pharmaceuticals Ltd	020-799310/ 20-245631	becca51@ymail.com
97.	Unisel Pharma (K) Ltd	774-188265/6	sales@uniselpharma.com
98.	United Pharma (K) Ltd	20 821761/ 712 951 081	sales@unitedpharma.co.ke
99.	Universal Corporation Ltd	734 513075/ 722207126/ 721922210	info@ucl.co.ke
100.	Vetcare Kenya Ltd	20 2052995/6/7/ 729 553 234	vitaphos@vetcarekenya.co.ke

Source: Pharmacy and Poisons Board Kenya, 2018

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10. Kenya Analgesics-Glaxo Smithkline (GSK) Presentation
11. Ministry of Health Kenya, Health Management Information System
12. Civil Registration Service, Kenya
13. Goodlife Pharmacy-Westlands
14. Mater Hospital Pharmacy-South B
15. New Lemuma Pharmacy-Tom mboya street, CBD
16. Doveypharma Pharmaceuticals-Westlands
17. Pentapharm Ltd-Tom mboya street, CBD
18. Malibu Pharmacy-Moi Avenue, CBD
19. Flame Tree Pharmacy Ltd-The Mall, Westlands

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