

# The Pharmaceutical Market: Sri Lanka



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## The Pharmaceutical Market: Sri Lanka

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### Sri Lanka Pharmaceuticals & Healthcare Report

Sri Lanka's negative pharmaceutical trade balance is expected to widen over the next five years. In an attempt to reduce medical costs, the government said in its 2011 budget that pharmaceutical products will be exempt from the port and airport levy, with the changes relating to drugs, medical devices and equipment. Although domestic manufacturing will struggle to compete with cheap medicines from India, we expect local producers to increase capacity considerably over the medium term. .

### Headline Expenditure Projections

**Pharmaceuticals:** LKR50.68bn (US\$458mn) in 2011 to LKR59.90bn (US\$501mn) in 2012; +18.2% in local currency terms and +9.4% in US dollar terms.

**Healthcare:** LKR250.62bn (US\$2.27bn) in 2011 to LKR278.82bn (US\$2.34bn) in 2012; +11.3% in local currency terms and +3.0% in US dollar terms.

**Medical devices:** LKR11.20bn (US\$101mn) in 2011 to LKR11.97bn (US\$100mn) in 2012; +6.9% in local currency terms and -1.1% in US dollar terms.

**Risk/Reward Rating:** According to our Q4 12 regional matrix, Sri Lanka is ranked 15th out of the 18 markets in surveyed, above Pakistan and Bangladesh. Sri Lanka's rewards and risks profiles are relatively evenly balanced, with low per capita expenditure on drugs and the modest overall market size some of key factors contributing to its low ranking.

### Competitive Landscape

The Competitive Landscape section provides comparative company analyses and rankings by US\$ sales and % share of total sales - for the total pharmaceutical sector, as well as the OTC, generics, and distribution sub-sectors.

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