



REPUBLIC OF TURKEY
MINISTRY OF ECONOMY



INDUSTRY



PHARMACEUTICAL INDUSTRY



TURKEY
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PHARMACEUTICAL INDUSTRY

Production of pharmaceutical preparations done in pharmaceuticals laboratories between 1928 and 1950 had increased with the establishment of local and foreign invested plants starting from the year 1952, which is the start of the “fabrication period” of the Turkish pharmaceuticals industry.

Within the period after 1984 up to the present, investments of foreign capital companies have increased and especially after the year 1990, 19 foreign capital firms have entered into Turkish pharmaceuticals market.

Today, there are 53 manufacturing facilities and approximately 300 entities operating in the sector in Turkey. 39 of the manufacturing facilities are local firms. On the other hand, 14 of the manufacturing facilities and 134 of the entities are owned by multinational firms.

Pharmaceutical industry has a production structure comprised of high level of technology and automation. Approximately 25.000 people are employed in the sector. Pharmaceuticals industry, due to its nature, is one of the industries which has a high proportion of personnel with university education (50%).

Turkish pharmaceutical industry is mainly located in the Marmara Region especially in provinces of Istanbul, Kocaeli and Tekirdağ. This is mainly due to the better infrastructure, ease of supply in packaging materials and technical personnel, telecommunication and transportation facilities and the existence of a high number of health institutions in the region.

The Turkish pharmaceutical industry has a well-organized structure. Most of the manufacturers and exporters have been organized under the roof of “The Pharmaceutical Manufacturers Association of Turkey” (İlaç Endüstrisi İşverenler Sendikası).

PRODUCTION

Pharmaceutical production trends are closely related to domestic and foreign demand. There were 7.413 pharmaceutical products on the market in 2009 out of which 4.928 were prescribed products. In 2011, these numbers were changed to 7.823 pharmaceutical products on the market out of which 5.264 were prescribed products.

In 2011, 64,3% of pharmaceuticals were local on Turkish pharmaceutical market. 21,7% of these were reference and 78,3% were generics. In 2011, the market for prescribed products has increased by 1,4% in value and became 14 billion US\$. In terms of the drugs in boxes, the prescribed market has increased to 1,56 billion boxes with an increase rate of 9,1%.

In 2008, there were 1.350 hospitals in Turkey with a total bed capacity of 188.065. An important new trend is receiving incoming patients from the European (mainly the United Kingdom) or Middle East countries for treatment in Turkish private hospitals.

In 2011, Turkey ranked as 6th in Europe and 14th in the world with its pharmaceuticals market which accounted for 10,4 billion US\$. Turkey targets to be ranked as 10th biggest country in the pharmaceuticals market. In terms of the number of Clinical Research Centers, Turkey ranks as 34th in the world.

Certain Turkish companies have started developing new products. İlsan İltaş has a sound worldwide know-how and technology in pellet development and production. The company has got process patents for omeprazol pellet production in Europe, Canada and South Korea, and has also been granted FDA approval for the finished product. Another company, Mustafa Nevzat plants have been approved for the API and finished dosage forms by FDA. This is also a “first” for the Turkish Pharmaceutical Industry. Mustafa Nevzat signed strategic partnership agreements with several leading US generic companies for marketing and sales of its products.

Pharmaceutical consumption in Turkey, by therapeutic class, includes antibiotics, cardiovasculars, antirheumatics, nervous systemics and oncologics.

The production of raw materials in Turkey concentrates on the active ingredients of antibiotics and analgesics, by using the methods of fermentation, extraction and synthesis.

Within the Turkish pharmaceutical raw materials sector, 11 plants are owned by the private sector.

The production and marketing of all pharmaceuticals in Turkey are obliged to be authorized by the Turkish Ministry of Health, and pharmaceutical products and firms must be registered in the Ministry.

The Turkish government has implemented a number of regulations to bring its pharmaceutical laws into line with those in the EU.

- Patent protection
- Data exclusivity
- Pricing
- Registration
- Good Manufacturing Practices(GMP)
- Good Laboratory Practices (GLP)
- Good Clinical Practices (GCP)
- Bioavailability / Bioequivalency
- Packaging Labelling
- Promotion / Advertising
- Drug Research and Medicinal Product Registration
- Stability Requirements
- Regulation on Good Distribution and Storage Practices
- Pharmacovigilance

Since 1995, pharmaceutical manufacturers have to abide by regulations specifying Good Manufacturing Practices (GMP), Good Laboratory Practices (GLP) and Good Clinical Practices (GCP) requiring significant investment by local industry companies. The necessary investments for the development of technology in the industry have been accelerated and today the production technology of the Turkish pharmaceutical industry has reached world standards.

EXPORTS

Turkish exports have shown a steady increase in recent years. In 2011, the total value of the pharmaceuticals exports reached US \$ 620 million.

Turkey is now exporting various pharmaceutical products to 144 countries including developed countries like Switzerland, Germany, the UK, the USA, Belgium and France.

The Pharmaceutical Industry Exports by Products (Value: US \$ 1,000)

HS No.	Products Name	2009	2010	2011
2936	Provitamins and vitamins, natural or reproduced by synthesis (including natural concentrates), derivatives thereof used primarily as vitamins, and intermixtures of the foregoing, whether or not in any solvents	2.326	2.417	1.952
2937	Hormones, natural or reproduced by synthesis; derivatives thereof, used primarily as hormones; other steroids used primarily as hormones	2.550	506	1.243
2938	Glycoside, natural or reproduced by synthesis, and their salts, ethers, esters and other derivatives	63	229	153
2939	Vegetable alkaloids, natural or reproduced by synthesis, and their salts, ethers, esters and other derivatives	37.878	44.523	44.133
2941	Antibiotics	2.100	6.112	6.106
3001	Glands and other organs for organo-therapeutic uses, dried, whether or not powdered; extracts of glands or other organs or of their secretions for organo-therapeutic uses; heparin and its salts; other human or animal substances prepared for therapeutic or prophylactic uses, not elsewhere specified or included	581	327	584
3002	Human blood; animal blood prepared for therapeutic, prophylactic or diagnostic uses: antisera and other blood fractions and modified immunological products, whether or not obtained by means of biotechnological processes; vaccines, toxins, cultures of micro-organisms and similar products	7.638	57.270	19.635
3003	Medicaments consisting of two or more constituents which have been mixed together for therapeutic or prophylactic uses, not put up in measured doses or in forms or packagings for retail sale	9.326	9.363	12.612
3004	Medicaments consisting of mixed or unmixed products for therapeutic or prophylactic uses, put up in measured doses or in forms or packagings for retail sale	378.752	457.947	499.550
3005	Wadding, gauze, bandages and similar articles	24.579	22.821	23.500
3006	Pharmaceutical preparations and products	8.141	10.555	10.946
	Total	473.934	612.070	620.414

Source: ITC Trademap

Pharmaceutical Products Exports by Countries (Value: US \$ 1,000)

	Countries	2009	2010	2011
1	Switzerland	33.235	87.686	92.720
2	Germany	82.120	84.243	59.777
3	Iraq	23.791	34.568	41.344
4	United Kingdom	27.737	39.500	35.482
5	U.S.A.	37.708	35.878	30.710
6	TRNC	26.400	31.274	28.631
7	Belgium	17.521	19.797	22.004
8	Free Zones	12.653	18.448	19.606
9	Slovenia	19.228	12.197	19.072
10	Azerbaijan	12.326	13.815	14.922
11	Iran	4.473	9.960	14.878
12	Algeria	19.793	16.193	11.187
13	Singapore	3.717	6.711	10.537
14	Republic of Korea	2.128	2.187	9.927
15	Serbia	5.146	7.107	9.022
16	Bulgaria	3.204	4.495	8.249
17	Uzbekistan	5.130	6.802	8.024
18	Jordan	1.174	2.110	7.590
19	Slovakia	1.122	1.347	7.319
20	France	6.604	8.615	7.239
21	Bosnia Herzegovina	6.257	5.679	7.096
22	Republic of Moldova	3.580	4.509	7.081
23	Ukraine	2.883	5.644	6.909
24	Kazakhstan	8.667	8.780	6.370
25	Hungary	941	2.452	6.007
26	Georgia	4.466	5.332	5.821
27	Poland	696	2.611	5.423
28	Afghanistan	2.793	3.984	4.989
29	Netherlands	8.392	16.652	4.808
30	Romania	2.811	3.640	4.661
	List Total	386.696	502.216	517.405

Source: ITC Trademap

TRADE FAIRS IN TURKEY

	Name of the Fair	Dates	Subject	City
1	Farmavizyon Pharmaceuticals Fair	6-8 April 2012	Pharmacy and Drug Industry	İstanbul CNR Expo Center
2	MEDIGAMES	11 - 14 July 2012	Sports Medicine Methods and Technologies	İstanbul Lutfi Kırdar Exhibition Center
3	Health Services and Hospital Equipments Trade Fair	27 - 30 September 2012	Health Services and Hospital Equipments	Adana TUYAP International Fair and Convention Center
4	ANFAŞ HETEX	1 - 3 November 2012	Health Tourism, Spa, & Wellness, Thalessa, Sport, Personal Care and Beauty	Antalya Expo Center
5	National Pharmacology Trade Show	3 - 4 November 2012	Medicine, Pharma technology, Laboratory and Hospital Equipment Analysis Appliances	İstanbul Lutfi Kırdar Exhibition Center
6	Istanbul Health Expo	29 November - 2 December 2012	Medical Products, Laboratory and Hospital Equipment	Istanbul CNR Expo Center
7	Eyafexpo	6-9 December 2012	Rehabilitation- Integration- Prevention-Care	Istanbul Expo Center

USEFUL LISTS

- Association of Research-Based Pharmaceutical Companies (AİFD)
www.aifd.org.tr/
- Pharmaceutical Industry Association of Turkey (TİSD)
www.tisd.org.tr/
- Pharmaceutical Manufacturers' Association of Turkey (İEİS)
www.ieis.org.tr

News Portal

- www.habermedical.com/tag/arastirmaci-ilac-firmalari-dernegi
- www.esdegerilac.com



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