



Pharmaceuticals and Medical Equipment in Asia Pacific

December 2022

INTRODUCTION

Scope

Key findings

REGIONAL OVERVIEW

Asia Pacific to dominate global pharmaceuticals and medical equipment output

Expanding access to healthcare to continue driving industry's growth within Asia Pacific

China to lead drugs and devices production growth within the region

Rising investment flows and improving business environment to support production

China to remain a major API producer, while Japan and Indonesia to rely on anti-infectives

Extensive elderly population to drive demand for pharmaceuticals in Japan

COMPETITIVE LANDSCAPE

Relatively high industry fragmentation in global standards due to prevalence of SMEs

Small firms remain the most prevalent, yet large ones account for most of the production

FOREIGN TRADE

Asia Pacific lags behind in exports as most drugs and devices are consumed domestically

Production localisation trend subdues import potential

COUNTRY SNAPSHOTS

China: Production context

China: Foreign trade landscape

Japan: Production context

Japan: Foreign trade landscape

South Korea: Foreign trade landscape

Taiwan: Production context

Taiwan: Foreign trade landscape

Hong Kong, China: Production context

Hong Kong, China: Foreign trade landscape

Singapore: Production context

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Philippines: Production context

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India: Production context

India: Foreign trade landscape

Thailand: Production context

Thailand: Foreign trade landscape

Vietnam: Production context

Vietnam: Foreign trade landscape

Malaysia: Production context

Malaysia: Foreign trade landscape

Indonesia: Production context

Indonesia: Foreign trade landscape

Kazakhstan: Production context

Kazakhstan: Foreign trade landscape

Uzbekistan: Production context

Uzbekistan: Foreign trade landscape

Azerbaijan: Production context

Azerbaijan: Foreign trade landscape

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