

TOWARDS SELF SUFFICIENCY

Forecasting Kenya's Pharma Industry

2025



Dr. Sarah Vugigi, PhD.

FOREWORD

This book provides a critical and timely analysis of Kenya's pharmaceutical manufacturing sector. Like many countries across the African continent, Kenya continues to depend heavily on imported pharmaceutical products to meet its domestic health needs. This dependence poses a long-standing challenge to national health security despite years of policy efforts to boost local production.

This book, originally developed as a graduate thesis, presents a comprehensive study of Kenya's pharmaceutical manufacturing capacity as the foundation for forecasting self-sufficiency. The findings, though collected ten years ago, remain remarkably relevant today. A 2020 study conducted by the International Development Research Centre (IDRC) on improving access to essential medicines in Kenya concluded that the country lacks adequate technical, financial, and human capacity to ensure sufficient domestic pharmaceutical production. The study further revealed that local pharmaceutical manufacturers supplied only 28% of the nationally required essential medicines. Moreover, a 2024 Ministry of Health report on local manufacturing capacity confirms that many of the constraints identified in this study persist. Key issues include inadequate manufacturing technology and infrastructure, workforce shortages, constrained access to raw materials, and the underutilization of existing production capacity.

The core objective of this study was to assess Kenya's capacity to produce essential medicines locally and to estimate when it could achieve pharmaceutical self-sufficiency. Drawing from data including on-site assessments of manufacturing plants capacity, workforce capacity, utility systems, and regulatory compliance, the book provides a grounded and comprehensive deep-dive into the Kenya pharmaceutical manufacturing sector.

What makes this study particularly valuable is its practical, ground-level approach. The author, currently in academia, brings over 20 years of experience in pharmaceutical manufacturing and quality systems, combined with a public policy perspective, lending credibility and depth to the situational analysis. By computing available and utilized production capacity across the manufacturing facilities and comparing locally produced products with the WHO Essential Medicines List, the book establishes a clear baseline for evaluating self-sufficiency potential.

Importantly, this study is not only technical but policy-relevant. This book provides a solid evidence base for decision-making and contributes directly to ongoing national conversations about health industrialization, particularly under Kenya's Vision 2030, where pharmaceutical manufacturing has been identified as a priority sector. As the government intensifies efforts to increase local production to cover over 50% of essential medicines demand, this book offers both a diagnostic framework and a roadmap to potential solutions.

Despite the time elapsed since the data was first gathered, the insights remain timely and urgent. The challenges and opportunities outlined here are critical for policy makers, industry stakeholders, and development partners working to revitalize Kenya's pharmaceutical sector. In publishing this book now, the author brings a well-researched, practically grounded, and still-relevant contribution to one of Kenya's most strategic development goals: pharmaceutical self-sufficiency.

As I reflect on my experience as a pharmaceutical consultant and former expert in local pharmaceutical production with the United Nations Industrial Development Organization (UNIDO), I contend that Kenya's pharmaceutical industry is underpinned by robust policy and strategic frameworks that are closely aligned with the country's national health and industrial development goals. However, this book recommends that realizing the industry's full potential requires coordinated efforts among policy-makers, industry stakeholders, academic institutions, research bodies, and regulatory authorities to assess the current landscape, identify existing gaps, and develop viable solutions that ensure adherence to quality standards and regulatory compliance. Such integration is critical to building sustainable production capacity, assuring the quality of medicines, and meeting both national healthcare needs and regional export demands.

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Towards Self Sufficiency: Forecasting Kenya's Pharma Industry

Access to essential medicines is a fundamental human right. Accordingly, the African Union Commission has developed the Pharmaceutical Manufacturing Plan for Africa to promote access to medicines through local production. Kenya has formulated a policy in accordance with this initiative to advance local pharmaceutical manufacturing, which originally began in the 1970s. This book provides a critical analysis of this sector, focusing on the key determinants of access to essential medicines. The findings offer valuable insights for developing strategies and policies to enhance self-sufficiency through local production, which currently stands at less than 30%.

This book comprehensively evaluates the current capacities in this sector, namely, range of products manufactured, pharmaceutical equivalents in the market, product competitiveness, availability of manufacturing inputs, technical capacity, regulatory compliance, production capacity and capacity utilization. The findings are vital for developing practical solutions and projections to strengthen production capacity and utilization, uphold quality standards, and ensure regulatory compliance across the pharmaceutical sector. The book underscores the need for coordinated action among policymakers, industry stakeholders, academia, research organizations, and regulatory.

About the Author



Dr. Sarah Vugigi is a Senior Lecturer in Pharmaceutics at Kabarak University, Kenya. She holds a B. Pharm. degree from the University of Nairobi, an M. Pharm. (Iowa, USA) and a PhD. (Kenyatta University). She began her career as a Pharmaceutical Analyst at Drug Analysis Research Unit, Nairobi and later joined Cosmos Limited, Kenya, as Quality Control Head. She has held a part-time teaching position at Nairobi and Kenyatta Universities. She has extensive experience in pharmaceutical manufacturing processes and quality systems. She joined Kabarak following a distinguished tenure at Elys Chemical Industries Ltd., where she served as Head of Quality and Regulatory Affairs. She has published several manuscripts on pharmaceutical production and quality, including the *Kenya Pharmaceutical Investment Profile* (2020), developed under the Partnership for Investment and Growth in Africa project, as well as a book titled *Critical Pharmaceutical Utility Systems* (2024), focusing on essential systems such as water, Heating, Ventilation and Air Conditioning, and compressed air.

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