Singapore Pharmaceutical Industry Report

Description: This report profiles Singapore's pharmaceutical industry, discussing market trends through 2014 and outlook for 2015 and beyond. The report also highlights leading players in the sector including Star Pharmaceuticals Limited, Haw Par Corp Limited and Pharmesis International Limited.

Singapore has successfully established a strong healthcare infrastructure ranked amongst the best in the world. The country has also become a major pharmaceutical trading hub of Southeast Asia. It is for this reason that more than 30 leading pharmaceutical and biomedical science companies have established regional headquarters in Singapore. The country is also the preferred site for the manufacturing base of leading multinational pharmaceutical companies.

Pharmaceutical manufacturing has been one of the major contributors to the overall growth of the domestic manufacturing industry in recent years. A substantive portion of total pharmaceuticals output were re-exported Singapore. But, the value of output and exports has declined during the last two years owing to uncertain global economic environment.

The outlook for Singapore pharmaceuticals is positive owing to the availability of skilled manpower, the presence of leading research institutions, a proactive government, relaxed regulatory environment, intellectual property protection and state of the art infrastructure. In addition, its strategic geographic location is bound to attract multinational companies which will establish their base in Singapore in the years to come.

Key Points:

- Total manufacturing output of the pharmaceuticals sector grew at a CAGR of 6% during 2009-12. However, it saw a steep decline in 2013, followed by another decline in 2014.
- The domestic manufacturing sector had a capital expenditure of SGD 14.5bn in 2013. Pharmaceuticals accounted for 2% of the total capital expenditure. Most of the investment made was for the establishment of research and development laboratories.
- Pharmaceutical exports accounted for 3% of the total non-oil domestic exports in 2014. Pharmaceutical exports grew at a CAGR of 13% during 2008-12. It contracted by 13% in FY13, but revived slightly in FY14 growing by 4% y/y.

Contents:
1. Industry Profile
   1.1 Sector overview
   1.2 Sector size
   1.3 Competitive landscape
   1.4 Environmental scanning

2. Market Trends and Outlook
   2.1 Key economic indicators-Singapore
   2.2 Production index
   2.3 Export turnover
   2.4 Value addition
   2.5 Human resources
   2.6 Cost of operation
   2.7 Capital expenditure
   2.8 Net value of fixed assets
   2.9 Market outlook

3. Leading Players and Comparative Matrix
   3.1 Leading Players
   3.1.1 Star Pharmaceuticals Limited (Star)
   3.1.2 Haw Par Corp Limited (Haw Par)
   3.1.3 Pharmesis International Limited (Pharmesis)
3.2 Comparative matrix
3.3 SWOT analysis

4. Tables and Charts
Table 1: Key highlights of good manufacturing practice standards
Table 2: Key government initiatives
Table 3: Key financial ratios of leading players FY14
Table 4: Comparison of half-yearly results of leading players 1H15

Chart 1: Top exporters of medicinal and pharmaceutical Products
Chart 2: Total sales output achieved by pharmaceuticals sector
Chart 3: Domestic sales of pharmaceuticals in Singapore in FY13
Chart 4: Cost of business start-up procedures-2014
Chart 5: Singapore quarterly GDP growth rate-Y/Y change
Chart 6: Quarterly exports from Singapore
Chart 7: Annual trade balance of Singapore
Chart 8: Annual fiscal balance of Singapore government
Chart 9: USD/SGD exchange rates-Monthly average
Chart 10: Core inflation in Singapore
Chart 11: Index of industrial production
Chart 12: Growth trend in manufacturing output
Chart 13: Share of different sectors in non-oil domestic exports of Singapore
Chart 14: Pharmaceutical exports
Chart 15: Value addition done by various sectors
Chart 16: Annual value added by pharmaceutical sector
Chart 17: Number of workers employed in pharmaceutical sector
Chart 18: Average annual remuneration per worker
Chart 19: Breakup of cost of operation in pharmaceutical sector
Chart 20: Operating margins in different manufacturing sectors
Chart 21: Breakup of capex done by the manufacturing industries
Chart 22: Annual capital expenditure in pharmaceutical sector
Chart 23: Breakup of total net value of fixed assets by industries
Chart 24: Net value of fixed assets-Annual
Chart 25: Business outlook in terms of net weighted balance for 2HFY15
Chart 26: Segmental revenues of Star
Chart 27: Net sales of Star
Chart 28: Profit margins of Star
Chart 29 Segmental revenues of Haw Par
Chart 30: Net sales of Haw Par
Chart 31: Profit margins of Haw Par
Chart 32: Segmental revenues of Pharmesis
Chart 33: Net sales of Pharmesis
Chart 34: Profit margins of Pharmesis

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