



# The UK Pharmaceutical Sector An Overview

Part of the Evolve UK series



Enterprise Ireland is the Irish Government's trade and innovation agency. It invests in the most innovative Irish companies through all stages of their growth and connects them to international customers across multiple industries. Our goal is to build successful, long-term business relationships between Irish companies and international partners. With offices worldwide, Enterprise Ireland's teams of industry experts consult with international businesses to understand and solve their business needs.

The UK remains the largest export market for indigenous Irish Companies. Enterprise Ireland supports Irish companies in the UK from offices in London and Manchester with Market Advisors across a wide array of sectors from construction to digital. Enterprise Ireland has commissioned Shibumi Consulting Limited to provide an overview of the UK pharmaceutical sector.

This report was completed in December 2019 and the information was collated using online searches and information available in the Enterprise Ireland Market Research Centre (MRC) at East Point, Dublin. A full list of sources used appears in the Appendix of this report.

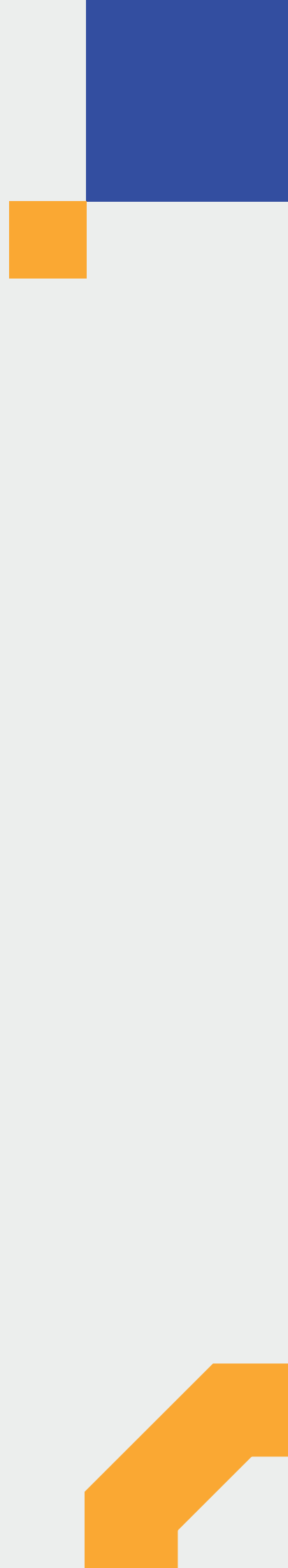
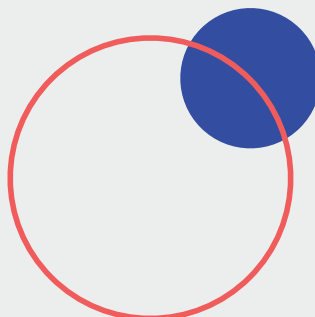
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# Enterprise Ireland

## UK Pharmaceutical Sector Overview

### Contents

Overview - Facts & Figures .....	2
UK Pharmaceutical Industry Characteristics .....	3
Pharmaceutical R&D Process .....	4
Market Overview .....	6
Challenges .....	7
The Rise of Generics .....	7
Brexit .....	8
Opportunities .....	9
Key Trends .....	11
UK Pharmaceutical Clusters .....	12
Top 50 UK Pharmaceutical Companies Rank 1-25 .....	15
Top 50 UK Pharmaceutical Companies Rank 26-50 .....	16
Active UK pharmaceutical manufacturing sites .....	17
Key Conclusions .....	19
Company Profiles .....	20
Appendix .....	34
List of Organisations and Associations .....	35
Pharmaceutical Companies by UK Region .....	36
UK Pharmaceutical Contract Manufacturing Companies .....	52
Members of the British Generics Manufacturing Association .....	53
List of UK Pharmaceutical Eudra GMP Compliant Companies .....	55
Additional Market Information .....	67
Partnerships, Mergers and Acquisitions .....	68
Health Expenditure .....	69
Drugs & Medicine Exports by Country .....	69

# Overview - Facts & Figures

The UK pharmaceutical sector is a major global centre for the production of pharmaceuticals and is critical to the UK economy.

According to the Office of National Statistics, 610 enterprises operated in the UK pharmaceutical sector in 2018.

**610**  
UK Enterprises



The UK pharmaceutical sector employs approximately 63,000 people and generates a market value of around £21bn.

**63,000**  
Employees



Two of the world Top 15 pharmaceutical companies are head quartered in the UK, namely GlaxoSmithKline (GSK) and Astra Zeneca.

**2**  
of Top 15



Of all the pharmaceutical products produced in the UK, 41% are exported, 30% are for the UK market and the remainder (28%) are substances that are used in the production of an other pharmaceutical product.

**41%**  
Exported



In the period from 2018 to 2023, the UK pharmaceutical sector value is forecasted to increase by 19.3% to £25bn, which equates to an annual growth of 3.6%.

**3.6%**  
Annual growth from  
2018 to 2023





# UK Pharmaceutical Industry Characteristics

The pharmaceutical sector has a number of unique characteristics:

## Single Primary Customer & Fixed Prices

The industry has one primary customer, the NHS.

The National Institute for Health & Care (NICE) assesses new drugs, following which NICE makes recommendations to the NHS. The NHS then decides which drugs to include in the prescription system, i.e. which drugs to offer to patients free of charge.

- Drug Assessment Criteria
- Efficacy
- Ease of use
- Side effects
- Value Proposition
- Cost

The Department of Health negotiates a five year price agreement with branded medicine manufactures; this is the Pharmaceutical Price Regulation Scheme (PPRS).

## Heavy R&D investment & the importance of New Product Development (NPD) Pipeline

The pharmaceutical sector invests heavily in R&D. According to the ONS, pharmaceutical R&D accounted for 27% of all UK manufacturing R&D.

30% of the UK pharmaceutical industry employment is focused on R&D and specifically:

- Formulation discovery, development and clinical trials
- Drug delivery device R&D and manufacture

40% of the UK pharmaceutical sector GVA comprises UK-based R&D activities.

The pharmaceutical industry is one of three technology-based industries in which the patent virtually equals the product. The others are the chemical and biotechnology industry.

The patented products of pharmaceutical companies can be easily and cheaply replicated.

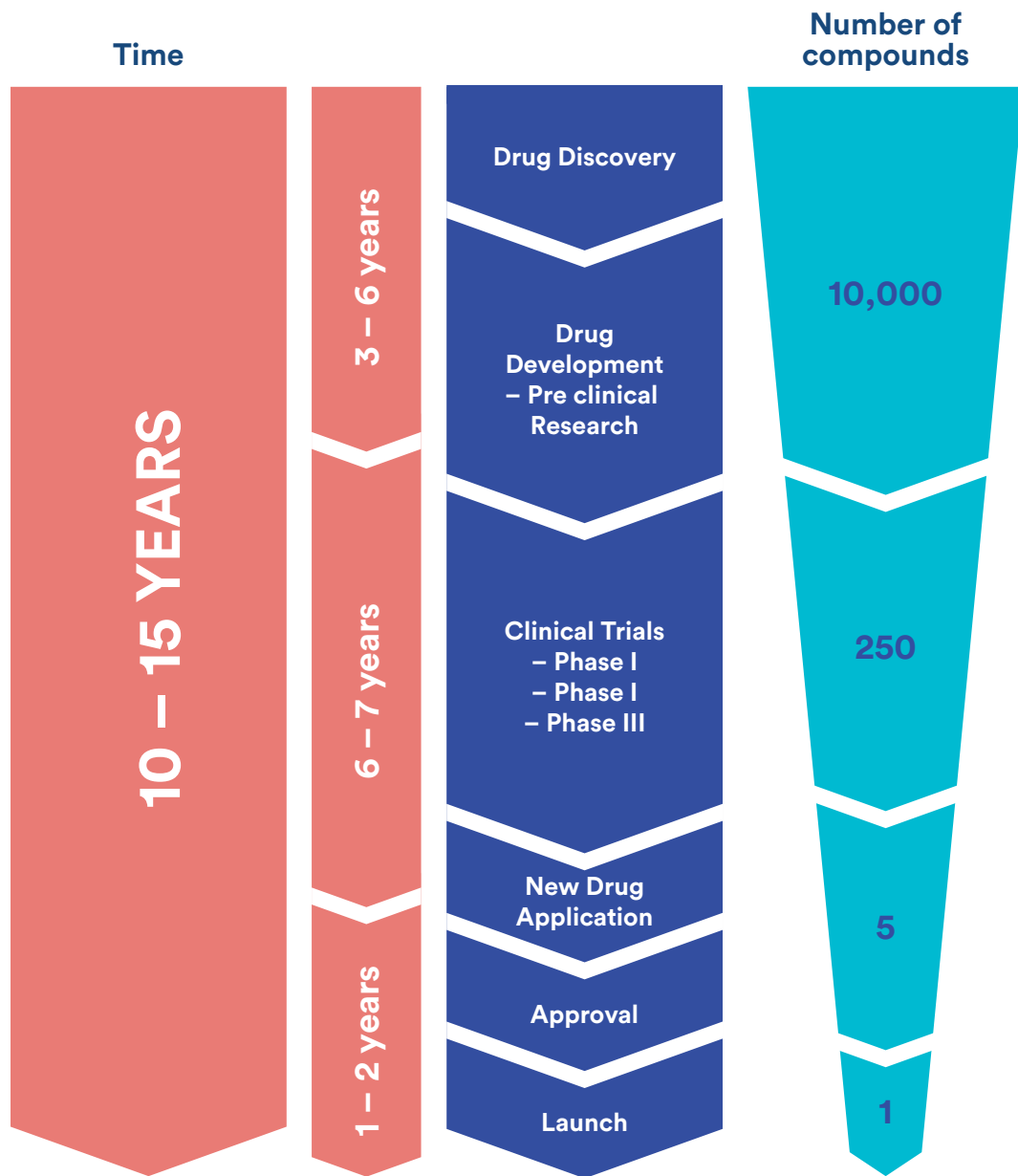
Thus, patent exclusivity is the only effective way to protect and receive a return on that investment.

The pharmaceutical R&D process is very lengthy. It can take between 12 and 15 years and cost up to £1bn to develop one new drug.

Supplementary Protection Certificates (SPCs) may be granted by the Court Justice of the EU (CJEU), for up to 5 years, however, in the US term extensions are available more easily which has resulted in a shift of R&D activity from the EU to the US.

It will be interesting to see if the UK introduces changes to patent extension rules post Brexit to increase attractiveness of the UK for pharmaceutical R&D.

# Pharmaceutical R&D Process



## R&D priorities are changing, due to:

- Regulatory & market environment changes
- Need to reduce time-to-launch
- Competitor & pricing pressure

## In order to minimise investment risk:

- New therapies need to offer significant benefit over existing therapies
- Early accurate risk vs reward assessment is essential to evaluate whether to proceed or terminate with R&D
- Strong patient and payer based value proposition needs to be developed, to aid faster approval from payers

One of the main pharmaceutical R&D challenges in the UK is how to be more flexible in a highly regulated sector.

Pharmaceutical companies are making organisational changes to meet this challenge.

**Three possible options are:**

1. Forming of cross functional groups with:
  - Commercial and R&D teams working together and sharing knowledge
2. Focus on one/few treatment areas:
  - Involve relevant medical community
  - Build relationships with external experts to have access to knowledge and new technology
  - Collaborations with academia for access to new ideas & talent
3. Or, alternatively: M&A

In line with the above, KPMG predicts that in future three business models for pharmaceutical companies are likely to emerge:

**Active Portfolio Company**

- Active in several treatment areas
- Able to acquire and/or divest parts if the portfolio

**Value Chain Orchestrator**

- Data-rich, using data to link supply and demand in global healthcare systems

**Niche Specialist**

- Focusses on one treatment areas, looking at the complete ‘patient pathway’ from prevention to cure

**With the emergence of personalised / targeted medicine and treatment regimes, R&D activities clearly also need to be patient-focused:**

“The patient moves from being a passive recipient of treatment to becoming a central part of the R&D process for new therapies”

*(Deloitte pharmaceutical R&D Leader Survey, 2017)*

This will help pharmaceutical companies identify unmet patient needs

**This in turn will create a positive cycle:**

- Patient needs are better understood >
- Focused R&D activities on meeting unmet patient needs >
- Facilitates creation of strong value proposition, that satisfies payers and providers & is seen to offer value for money >
- Leads to a commercially successful product

# Market Overview

## 1. The UK Market

There are opportunities for companies who have the supply chain capability to sell into UK pharmaceutical companies.

The UK health budget in 2017/18 was £124.7bn, which represented an increase of 1.8% over the previous year.

**The strong domestic demand for pharmaceutical products was due to the rising prevalence in chronic diseases.**

- Cancer incidence continues to rise in the UK, with breast, prostate and colorectal cancers accounting for more than 50% of all cancers
- Diagnoses of diabetes more than doubled over the last 20 years
- The number of obese people in the UK is forecasted to double by 2035

**UK hospital spending on health products continues to rise, attributed to:**

- Increased number of patients
- Use of new, expensive treatments

R&D remains a strong growth area in the UK including £146m of state funding committed to 2023 for advanced therapy, medicine and vaccine development & manufacturing.

## 2. The UK and the USA

**The US is the single biggest pharmaceutical buyer market:**

- At present, the US accounts for almost half (49%) of pharmaceutical sales globally by value, followed by Europe (21.5%)
- In 2018, the US FDA approved 64 new drugs
- The US is seeing rising sales in drugs for oncology, immunology and the nervous system i.e., drugs related to quality of life in human ageing

**Exports from the UK to the US are expected to stabilise, due to:**

- New drugs being introduced to the market
- The weaker £
- Easing of the US price competition as some manufacturers are expected to cut back on sales of generics in the US, such as Novartis and Teva pharmaceutical

However, uncertainty around the future of the US Affordable Care Act remains a concern, as well as the viability and extent of a US-UK-Trade-Deal post Brexit.

## 3. The UK and Emerging Markets

**Emerging world-economies like China, India & Brazil are expected to increase pharmaceutical expenditure over the coming years as their economies strengthen.**

Governments are increasingly committed to improving the healthcare provided in these countries.

The population is becoming more wealthy, consequently:

- They can afford treatments and medicine
- There is a rising prevalence of lifestyle diseases, such as cancer and diabetes
- China is the top growing export market for UK pharmaceutical products, due to:
- Increased acceptance of 'Western' medicine
- Removal of tariffs, which has enabled easier access

**BMI research predicts that by 2025, the pharmaceutical revenue from emerging markets could be as high as £381bn, representing an increase of 227% from 2010.**



# Challenges

In 2017 the UK pharmaceutical industry turnover slowed down, particularly due to the falling demand from the US when some important drugs lost their patent protection, e.g. Novartis for Gleevec.

According to Euromonitor, companies continued to invest in UK pharmaceutical R&D activities in 2018.

However, due to the Brexit uncertainties, pharmaceutical companies have become more cautious in their spending and particularly larger capex projects are increasingly being put on hold.

“We have seen capex shift slightly away from larger primary production facilities to smaller research, development and testing facilities. The quantity of projects has not dipped in a significant way – but the total potential investment value has... There is plenty of potential for suppliers of capital equipment and associated services, but the marketplace is likely to become increasingly challenging as companies compete to win smaller capex schemes”

*(www.protelprojects.com – UK pharmaceutical industry outlook 2019)*

## The Rise of Generics

### **End of the ‘Blockbuster Paradigm’**

- A number of the blockbuster drugs will come off patents in the next few years

### **Rise of Generics**

- Generics are up to 90% cheaper than the equivalent branded product, offering the same active ingredient and efficacy
- This has been described as the ‘patent-cliff’ for branded products
- According to the British Generics Manufacturers Association, the NHS saves £13.5bn per annum, by substituting branded with generic drugs
- Some branded drugs producers have started selling generic versions of their own product to avoid additional competitors appearing on the markets and/or they have entered into partnerships or have acquired generic players in developed and emerging markets

**However, despite the cost savings, many consumers continue buying the branded Over The Counter products, e.g. Nurofen, instead of generic Ibuprofen.**

# Brexit

Brexit has resulted in a great deal of uncertainty amongst UK pharmaceutical companies.

“There is also a that some global pharmaceutical companies will choose to transfer part of their production activities from the UK to the EU, jeopardising the outlook of the UK pharmaceuticals industry”  
(Euromonitor, November 2018)

## Access to skilled workforce & funding

- Being a sector with a high R&D intensity, the UK pharmaceutical sector needs access to skilled employees and funding
- Post Brexit, UK pharmaceutical enterprises and universities will no longer have access to EU funding initiatives like Horizon 2020. (NB: Currently the UK is awarded 15% of all Horizon 2020 funding, equal to €4bn.)
- Links to EU collaborators will weaken as EU-funded collaborative research programs will exclude UK research providers
- Thus, it is possible if not likely that the UK pharmaceutical R&D base will shrink, initially at least

## Additional costs

- UK pharmaceutical manufacturers anticipate having to set up additional operations in the EU in the case of a hard Brexit, to ensure access to supply chain & markets
- It is expected that additional laboratories, located in the EU territory, for batch release testing will become necessary to ensure that UK companies can continue exporting and distributing their pharmaceutical products in the EU post Brexit

## Regulatory impact on new medications

- The European Medicine Agency (EMA) has already relocated from London to Amsterdam due to Brexit
- At present, once a drug has received EMA approval it can be sold across all EU markets and the UK
- If, post Brexit, the UK no longer shares the same regulatory framework, an additional layer of regulatory compliance administration will increase pharmaceutical development costs

- 

## Market access

- EU currently account for 63% of total UK pharmaceutical trade, with Germany being the UK's main trading partner
- UK entry customs inspections could create delays, which may have a negative impact on service and margins

## IP protection & management

- At present it is uncertain how Brexit will impact on IP protection and whether the UK will remain part of the EU Unitary Patent Initiative, or European Patent with Unitary Effect (EPUE)

# Opportunities

## 1. Big Data Exploitation, AI & Machine Learning

Companies are increasingly developing or acquiring data gathering and analytics capabilities or commercialising anonymised patient data in order to streamline their operations & facilitate the mining of patient data. Medical insurers, drug delivery device developers, pharmaceutical companies, clinics and leading internet technology companies are prominent in this.

This is seen to aid:

- Decision making
- Development of targeted/personalised treatment:
  - to ensure the right medicine is used, at the right dose, at the right time, to the right patient, to support the right therapy
  - to know which patients do not benefit from a given medicine/treatment/therapy
  - Clinical trial design, to improve speed and outcomes of clinical trials

One key goal is to speed up the drug development process by making data-gathering in clinical trials more efficient, thus increase the number of years of earnings whilst the drug is patent protected.

Some of the main data management challenges are:

- Dealing with multiple disparate data sources and managing data accessibility
- Ensuring continued accessibility to legacy data
- Adapting to evolving data ownership and privacy concerns e.g. GDPR

All in all, pharmaceutical companies have recognised the value of data to help them identify, develop and market new drugs.

## 2. New Technology and Industry 4.0

New manufacturing technology and increased automation will improve manufacturing efficiency and reduce costs.

As for patient regimen compliance, digital medicine (e.g. drugs with ingestible sensors; wearable or implantable bio-signs monitors, drug delivery devices with web-enabled dose counters) is expected to result in significant improvements.

### 3. Changing manufacturing model (CDMO's)

As already highlighted, the blockbuster paradigm is predicted to come to an end. This model is all about large scale production for broad use and application.

Instead the move is towards more tailored medication and treatment regimen, which means smaller scale, batch production.

The pharmaceutical industry has also seen increased price pressure nationally and globally from generics and the prices negotiated under the pharmaceutical Price Regulation Scheme (PPRS).

In addition, due to increasing demands and complexity with regards to manufacturing laws & regulations it is becoming more difficult and expensive to maintain GMP certification at sites.

As a consequence, UK pharmaceutical companies are increasingly looking to outsource manufacturing and packaging to Contract Development & Manufacturing Organisations (CDMOs). This allows pharmaceutical companies to divest plants to CDMOs in order to release capital and cut overhead.

CDMOs can work with multiple clients, thus maximising plant utilisation and achieving economies of scale.

A list of UK pharmaceutical CDMOs appears in the Appendix.  
A relevant trade show is held in Munich in March 2020:  
[www.pharma-iq.com/events-pharmacontractmanufacturing](http://www.pharma-iq.com/events-pharmacontractmanufacturing)

# Key Trends

**Major reductions in morbidity have been achieved in the following areas in developed countries during the last two decades:**

- HIV/AIDS
- Certain cancers
- High blood pressure
- Cardiovascular diseases

**Areas of research where efficacious treatments have not yet been introduced that are likely to be the focus in the coming years are:**

- Alzheimer's
- Multiple Sclerosis
- Certain cancers
- Orphan diseases

**Top 3 causes of death, and thus priority areas for treatment improvements, in the EU in 2017 were:**

- Cardiovascular disease 37%
- Malignant Neoplasms 26%
- Disease of the respiratory system 8%

**Meeting the medical and treatment needs of an ageing population**

By 2046 it is estimated that a quarter of the UK population will be 65 years old or older, due the combination of fewer births and people living longer.

As a result, there will be increased demand for the treatment of age related illnesses, such as:

- Alzheimer's
- Cancer
- Cardiovascular disease
- Chronic Obstructive Pulmonary Disease (COPD)
- Joint and muscle pain

**Personalised Medicine**

With a number of patents lapsing in the coming years, it has been described as the end of the 'blockbuster drug paradigm'.

In its place, more tailored treatments are expected to emerge, to result in more targeted and efficacious therapies.

However, revenue potential for targeted treatments is likely to be lower, due to their suitability for a smaller patient populations only.

A more targeted treatment approach will require in-depth understanding of patients' needs and requirements. This is likely to result in the following:

- Greater patient involvement in the drug development process
- Consultation with stakeholders
- Changes to clinical trials, to facilitate the development of more personalised treatment regimes

# UK Pharmaceutical Clusters

Although pharmaceutical enterprises are located across all UK regions, a couple of geo-clusters stand out: The North West and East of England & London.

The North West is the manufacturing hub for UK pharmaceutical, with 38% of the output and 43% of the UK pharmaceutical turnover being generated there.

Pharmaceutical companies located in the North West region include: Astra Zeneca, Eli Lilly and GSK. The GSK head office is in West London.

## 'The Golden Triangle': Oxford, Cambridge, London

### Oxford:

- Oxford Biotech Network (OBN): <http://obn.org.uk/>
- Oxford Biotech cluster is the most mature life science cluster in Europe

### Milton Park home to:

- Business, science & technology facilities
- More than 250 businesses, for full list see: <https://www.miltonpark.co.uk/whos-here>

### University Spinouts include:

- Oxford BioMedica
- Oxford Gene Technology
- Celleron Therapeutics

## Cambridge 'the beating heart of research & science in the UK'

### Healthcare & NHS

- Addenbrooke's Hospital and the Rosie
- Royal Papworth Hospital NHS Foundation Trust
- Cambridgeshire and Peterborough NHS Foundation Trust

### Academic and Commercial R&D Performers

- The School of Clinical Medicine
- The Medical Research Council Laboratory of Molecular Biology
- Large technology consulting firms

### Education

- The Deakin Centre
- Cambridge Academy for Science and Technology

### Industry

- AstraZeneca
  - GSK Experimental Medicine and Clinical pharmacology Unit
  - Abcam plc
  - IdeaSpace
  - IOTA pharmaceuticals
- (<https://cambridge-biomedical.com/>)

## London & Greater South East

MedCity was launched in 2014, to promote the South East England Life-Science Cluster:  
<https://www.medcityhq.com/>



“Whatever your type of company or stage of growth, whether you are new to the region or already working here, we can help guide and support you to successfully do business here. MedCity is your little black book for the golden triangle – I and my team look forward to working with you”

*Dr Eliot Forster, Executive Chair, MedCity*

Stevenage Bioscience Catalyst (SBC) is the UK's first open innovation campus, to bring industry & academia together.

- Funded by: BEIS, GSK, Wellcome & Innovate UK
- For a full list of companies, see: <https://www.stevenagecatalyst.com/community/organisations/>
- Roche's global R&D hub in Welwyn Garden City

## “The Northern Powerhouse”

The Northern Powerhouse region covers the North West, North East and Yorkshire.

There are 1,000+ life science and healthcare companies are located here, including: Allergan, AstraZeneca, BMS, Eli Lilly, GSK, MSD, Recipharm & Shire.

Activities include manufacturing and R&D.

### North West

Several global pharmaceutical companies have manufacturing sites in the UK's North West region, including: Eli Lilly, AstraZeneca, Medimmune, and Novartis.

Centres for pharmaceutical manufacturing in the North West:

- Speke, Liverpool
- Alderley Park, Macclesfield  
<https://www.alderleypark.co.uk/>

### North East

UK Centre for Process Innovation (CPI).

- An independent technology innovation centre
- Bringing together academia, businesses, government and investors to translate bright ideas and research into the marketplace
- Pharmaceutical manufacturing sites in the North East include MSD and GSK

### Yorkshire & the Humber

A cluster of orthopaedic, medical device & surgical companies, including Smith & Nephew and Reckitt Benckiser  
Other organisations in the area include:

- WELMEC – Centre of Excellence in Medical Engineering
- EPSRC – Centre for Innovative Manufacturing in Medical Devices
- Leeds Innovation and Knowledge Centre

### Scotland

- Edinburgh Bio Quarter: <https://edinburghbioquarter.com/>
- Located here are: Queens Medical Research Institute, FIOS Genomics, Scottish Centre for Regenerative Medicine

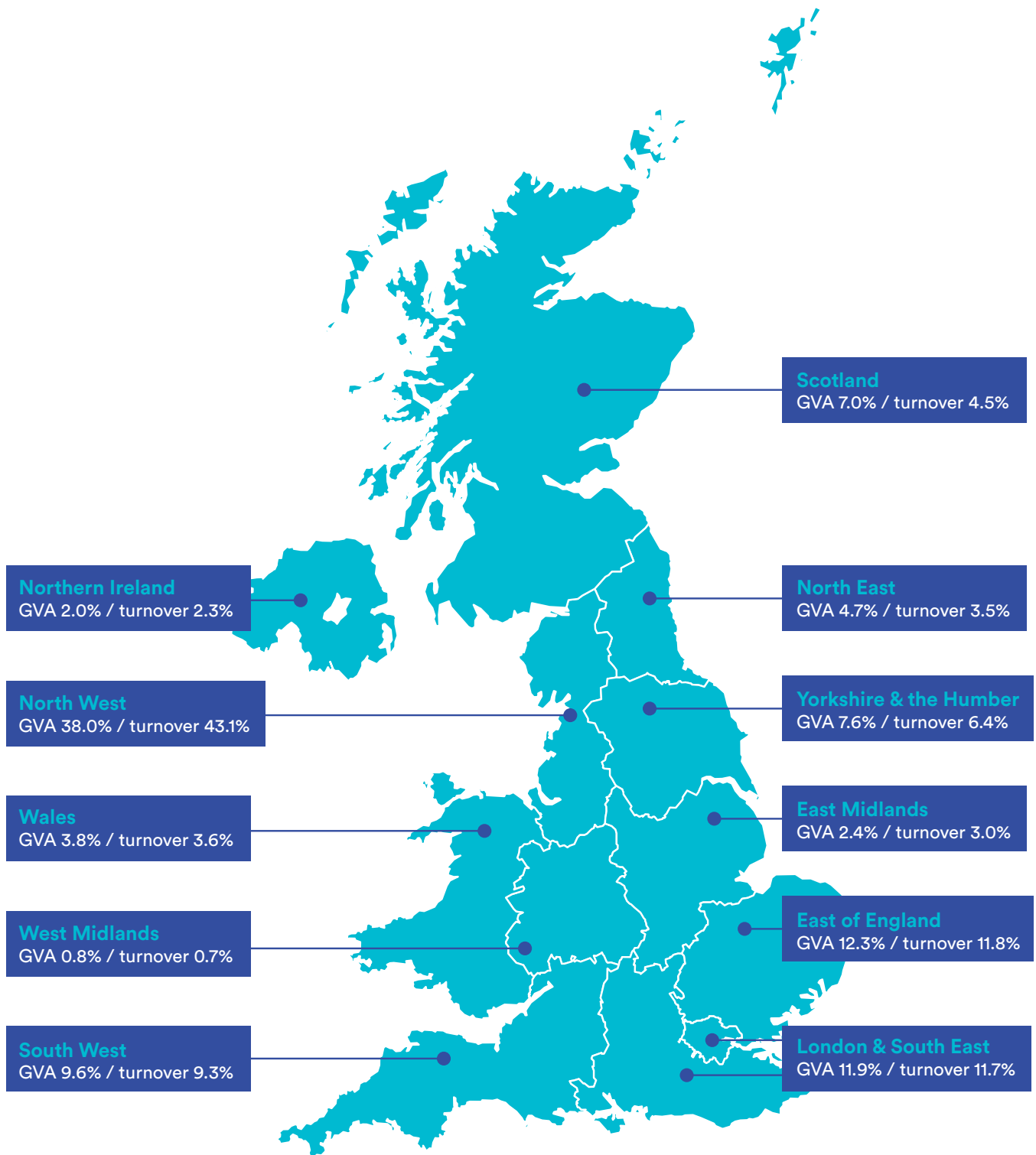
### Wales

- Life Science Hub Wales, based in Cardiff Bay: <https://lshubwales.com/>
- Target to deliver £1bn to the Life Science Sector by 2022
- Members include: GE Healthcare, Johnson & Johnson, Novartis and MSD

### Northern Ireland

There are approximately 150 Life Science enterprises in NI, including Almac Group, a contract development and manufacturing company.

## UK pharmaceutical Sector Output & Turnover by Region (%)



# Top 50 UK Pharmaceutical Companies

## Rank 1-25

(Source: Plimsoll, July 2019)

Company	Sales	Sales Growth %
GSK plc	£30.8bn	2.1
Astra Zeneca plc	£17.3bn	4.2
Reckitt Benckiser Group plc	£12.6bn	9.4
Smith & Nephew plc	£3.8bn	9.1
AAH pharmaceuticals Ltd	£3.4bn	4.9
Vertex pharmaceuticals (Europe) Ltd	£1.8bn	36.5
Kima pharmaceuticals plc	£1.6bn	13.3
IQVIA Ltd	£1.1bn	6.5
Phoenix Healthcare Distribution Ltd	£1.1bn	5.2
Eli Lilly & Co Ltd	£964.3m	13.3
Roche Products Ltd	£963.6m	-3.6
Pfizer Ltd	£850.3m	-18.9
Indivior plc	£788.0m	-2.5
Merck Sharp & Dohme Ltd	£748.4m	25.1
Bayer plc	£720.4m	23.3
Novartis pharmaceuticalceuticlas UK Ltd	£631.1m	2.5
BTG plc	£620.5m	8.8
Abbvie Ltd	£580.1m	5.6
Janssen-Cilag Ltd	£552.5m	18.9
Almac Group Ltd	£548.9m	3.3
Seqirus UK Ltd	£547.4m	2,572.30
Teva UK Ltd	£522.2m	26.2
Accord Healthcare Ltd	£466.9m	95
Aventis pharmaceutical Ltd	£453.2m	32.3
Gilead Sciences Ltd	£438.1m	-14.4

# Top 50 UK Pharmaceutical Companies

## Rank 26-50

(Source: Plimsoll, July 2019)

Company	Sales	Sales Growth %
Baxter Healthcare Ltd	£427.0m	5.1
Clinigen Group plc	£381.2m	-8.3
Boehringer Ingelheim Ltd	£358.2m	-8.3
Novo Nordisk Ltd	£357.0m	22
Eisai Europe Ltd	£342.6m	8
Bristol-Myers Squibb pharmaceuticals Ltd	£313.2m	66.4
Consort Medical plc	£311.1m	5.8
Syneos Health IVH UK Ltd	£296.8m	9
Biogen Idec Ltd	£290.7m	36.8
NAPP pharmaceuticals Holdings Ltd	£289.7m	0.6
Barclay pharmaceuticals Ltd	£281.4m	-5.3
Norbrook Holdings Ltd	£275.1m	1.1
Ipsen Biopharm Ltd	£267.8m	52.3
McNeil Healthcare (UK) Ltd	£266.8m	2.1
Abbott Laboratories Ltd	£257.4m	2.4
Sigma pharmaceuticals plc	£250.0m	-1.4
GE Healthcare Ltd	£247.9m	20.2
Ortho-Clinical Diagnostics	£245.9m	18.2
Celgene Ltd	£222.4m	7
Chiesi Ltd	£222.2m	27.3
Allergan Ltd	£215.1m	4.2
Clinigen Healthcare Ltd	£208.0m	4.2
Bio Products Laboratoru Ltd	£202.3m	13.8
Otsuka pharmaceutical Europe Ltd	£200.3m	17.5
Astellas pharmaceutical Ltd	£190.9m	-2.6

# Active UK pharmaceutical manufacturing sites

Identifying active UK pharmaceutical manufacturing sites is challenging as the sector is dynamic and constantly changing. Frequent merger and acquisition activity as well as internal and external competition for manufacturing contracts lead to continual reconfiguration of the manufacturing networks of pharmaceutical companies. Pressure to idle or dispose of manufacturing sites comes from the economic viability of maintaining GMP certification in ageing plants combined with falling sales margins. A further factor is the rise of contract development and manufacturing operations (CDMO's) who buy underutilised manufacturing sites.

The existence of CGMP (Current Good Manufacturing Practice) certification of a pharmaceutical manufacturing site is a useful proxy for active manufacturing activity. The EudraGMP database logs regulatory actions between manufacturers and the MHRA (Medicines and Healthcare products Regulatory Agency) relating to GMP under EU Directives.

This database was searched for UK manufacturing sites that have received GMP approval for human or veterinary pharmaceutical manufacturing or packaging operations that is valid until the end of 2020.

The map following presents the results of this search.

The map confirms the distribution of manufacturing activity, with concentration in the following regions:

- North West
  - London & Home Counties
- and also in:
- North East
  - Midlands
  - Scotland

A detailed database of the sites is available in the Appendix.

## Active UK Pharmaceutical Manufacturing Sites



Click this link to see a full list of [Active UK Pharma Manufacturing Sites](#)



# Key Conclusions

The pharmaceutical sector is critical to the UK economy and in the period 2018 to 2023, the value is forecast to increase by 19.3% to £25bn, which equates to an annual growth of 3.6%. The sector contributes significantly to UK exports with the two key markets being the US and the EU. However, there are uncertainties with regards to both these markets as it seems likely that UK pharmaceutical companies will look to export to emerging markets, which offer untapped potential. These are China, India and Brazil.

It is envisaged that some UK pharmaceutical manufacturers may decide to transfer UK manufacturing operations to EU-based plants post Brexit. Some large investments and Capex projects have been put on hold as long as the outcome of the Brexit process is unclear. However, when risks reduce as the substantial backlog of UK investment projects are likely to resume, there may be new opportunities for companies to bid for projects. This will include investments in plant, machinery and training.

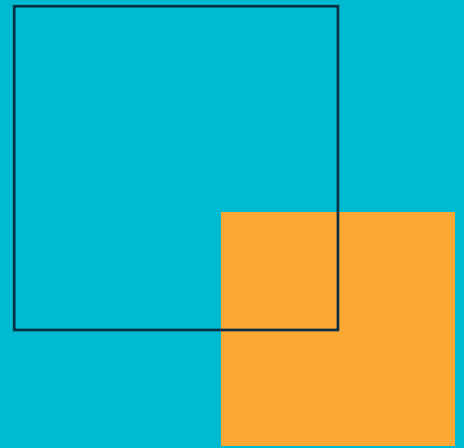
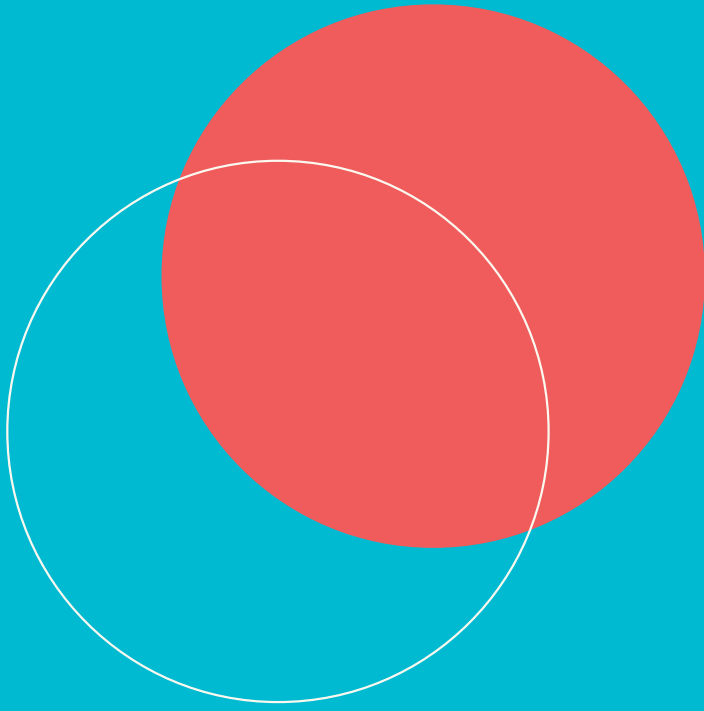
From an R&D perspective, pharmaceutical companies are looking for R&D partners in areas where they lack capabilities & expertise e.g. data analytics and novel drug delivery device development and to contract the R&D process and to minimise risk. Therefore, there are R&D opportunities for Irish startups, spin outs and SMEs.

Pharmaceutical companies are looking for solutions around big data and AI and how best to use this new technology.

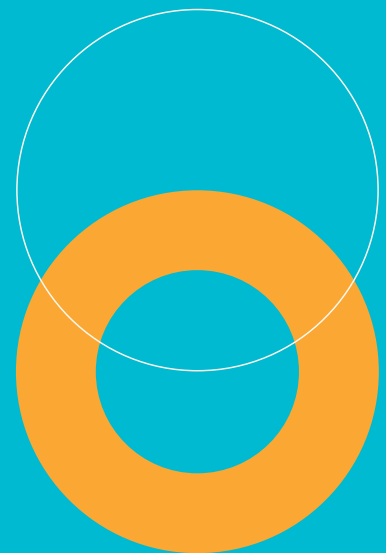
There are opportunities for companies to introduce and advise on new manufacturing technology as increased automation will improve manufacturing efficiency and reduce costs.

The key to successful collaboration with UK pharmaceutical companies is:

- Identifying unmet needs of pharmaceutical companies and offer innovative solutions
- Applying new technology to reduce development time, improve efficiency and/or reduce risk
- Identifying regulatory and market changes in the UK and globally and support UK pharmaceutical companies to meet these challenges



# Company Profiles



# GlaxoSmithKline PLC

**“We are a science-led global healthcare company with a special purpose: to help people do more, feel better, live longer. We have three global businesses that research, develop and manufacture innovative pharmaceutical medicines, vaccines and consumer healthcare products”**

## Headquarters

GSK House 980 Great West Road, Brentford, Middlesex, TW8 9GS	
Telephone +44 (0)20 8047 5000	
GSK UK	
Staff	16,000 employees across 18 sites
UK Locations	<a href="https://uk.gsk.com/en-gb/about-us/uk-locations/">https://uk.gsk.com/en-gb/about-us/uk-locations/</a>
Turnover	£30.8bn
Website	<a href="https://uk.gsk.com/">https://uk.gsk.com/</a>

## R&D Treatment Areas

- Respiratory: COPD, Asthma
- Endocrine: Diabetes
- Cancer: Prostate, breast, lung, solid tumor
- Pain: peripheral nerve injury, neuropathic pain
- Heart, Blood & Circulatory: Anemia, Leukemia, Thrombosis
- HIV/AIDS
- Anti-virals
- Central nervous system
- Metabolic
- Rheumatoid Arthritis
- Influenza
- Nausea & Vomiting
- Atherosclerosis
- Treatment of Narcolepsy
- Insomnia
- Psoriasis
- Mental health: Schizophrenia
- Epilepsy
- Vaccines
- Shingles
- Neurological: Parkinson’s Disease, Alzheimer’s Disease, Multiple Sclerosis

## Treatment Areas

- Allergy
- Anti Infectives
- Cardiovascular
- Dermatology
- Gastroenterology
- Influenza
- Musculoskeletal
- Neurology
- Rare diseases
- Respiratory
- Urology
- Vaccines

Hal Barron, Chief Scientific Officer and President, R&D, gives an update on R&D:  
<https://www.youtube.com/watch?v=ayL8INVFH1w>

Emma Walmsley, CEO, summarises Q2 2019 performance:  
<https://youtu.be/3ofsRua6OAU>

# AstraZeneca PLC

“A global pharmaceutical company with a major UK presence. Our purpose is to push the boundaries of science to deliver life-changing medicines. The best way we can help patients is to be science-led and share this passion with the scientific, healthcare and business communities of the UK.”

## Headquarters

AstraZeneca PLC 1 Francis Crick Avenue, Cambridge Biomedical Campus, Cambridge CB2 0AA	
Telephone +44 (0)20 3749 5000	
AstraZeneca UK	
Staff	6,500 employees across 5 sites
UK Locations	Cambridge, Cheshire, x3 Bedfordshire
Turnover	£17.3bn
Website	<a href="https://www.astrazeneca.co.uk/">https://www.astrazeneca.co.uk/</a>

## Treatment Areas

- Oncology, breast cancer, prostate cancer, lung cancer, ovarian cancer
- Respiratory, asthma, COPD, broncho-obstructive symptoms, bronchopulmonary disorders
- Coronary, acute coronary, cardiac arrhythmias, hypertension, acute myocardial infarction
- Diabetes
- High Cholesterol
- Influenza prophylaxis
- Gastro-oesophageal reflux disease, duodenal ulcers
- Treatment of schizophrenia, bipolar disorder, depression
- Treatment of osteoarthritis, rheumatoid arthritis and ankylosing spondylitis

## R&D

- 164 projects in the pipeline
- 9 new molecular entities in the late stage pipeline
- 1 new molecular entity approval in Q2 2019
- Treatment Areas:
  - Oncology
  - Cardiovascular
  - Respiratory
  - Other: Psoriasis, Parkinson’s disease, rheumatoid arthrities, lupus nephritis, osteoarthritis, pneumonia, irritable bowel syndrome, stress ulcer prophylaxis

### Company video:

<https://www.astrazeneca.co.uk/content/dam/az-uk/ImageBank/AZ%20in%20the%20UK%20Video%202019%20Subtitled%20Version.mp4>

# Reckitt Benckiser PLC

“RB is more than a company. It’s a growing community of 40,000+ diverse, talented entrepreneurs – all driven to make the world a happier, healthier place. Drawing on each other’s skills and working together, we help make people feel better. Through research and development, we make better products that empower everyone to take their health into their own hands and homes.”

## Headquarters

Reckitt Benckiser PLC Turner House103-105 Bath RoadSlough, BerkshireSL1 3UH	
Telephone +44 (0)1753 217800	
Staff	40,000 globally
UK Locations	Two UK sites, both in Slough
Turnover	£12.6bn
Website	<a href="https://www.rb.com/">https://www.rb.com/</a>

## Offer Partnerships

- Co-creation
- You have a great proof of principle concept that’s ready to go.
- Existing product
- You’ve created a product that will make a difference to people’s lives
- You have a high-performing, innovative product in a specific part of the world and you know it has potential to go global with the right partner.
- Developing technology
- You have a leading technology that will change the game in consumer health and have a strong case as to how it’ll improve one of our solutions.

## Health Innovation focus:

- Mother and infant nutrition
- Pain alleviation
- Healthy ageing

## Product Launch, April 2019:

- Neuriva; a supplement that has been shown to boost brain function.

# Eli Lilly and Company Ltd

“Lilly makes medicines that help people live longer, healthier, more active lives.”

## UK Headquarters

Eli Lilly and Company Limited  
Lilly House, Priestley Road, Basingstoke, Hampshire, RG24 9NL

Telephone 01256 315000

Staff 33,000 worldwide, 800 staff in the UK, across two sites

HQ Locations Indianapolis, Indiana, U.S.A.

Turnover £964.3m

Website <https://www.lilly.co.uk/>

## Treatment Areas

- Diabetes
- Treatment of pulmonary arterial hypertension
- Cancer: lung, gastric, breast
- Treatment of erectile dysfunction
- Treatment of depression, Anxiety, Obsessive-compulsive disorder, Bulimia nervosa, Schizophrenia
- Treatment of Attention-Deficit/Hyperactivity Disorder (ADHD)
- Diabetic peripheral neuropathic pain
- Migraine
- Treatment of osteoporosis
- Treatment of growth retardation
- Rheumatoid arthritis
- Psoriasis
- Stress Urinary Incontinence

## R&D Treatment Areas

- Today, we largely concentrate in therapeutic areas in which we have deep expertise, including diabetes, neurodegeneration and Alzheimer’s disease, and oncology, alongside research in therapy areas that build on that expertise and our knowledge of chronic conditions, such as pain and immunology.



# Roche Products Ltd

“Founded in 1896, Roche continues to search for better ways to prevent, diagnose and treat diseases and make a sustainable contribution to society. We have one mission: to do now what patients need next.”

“In 2017 Roche invested 388m pounds in UK R&D and conducted 181 clinical trials<sup>1</sup> More than 519 million Roche diagnostic tests were carried out, and more than 700,000 people benefited from our medicines in the UK during 2017. We contributed £1.2 billion in UK GDP and supported 16,600 UK jobs”

## Headquarters

Roche Products Ltd  
Hexagon Place, Falcon Way, Shire Park, Welwyn Garden City AL7 1TW, United Kingdom

Telephone +44 1707 366000

Turnover £963.6m

Website <https://www.roche.co.uk>

## Treatment Areas

- Anemia
- Cancer
- Cardiovascular Disease
- Central nervous System
- Dermatology
- Hepatitis B&C
- HIV/AIDS
- Infectious Diseases
- Inflammatory & Autoimmune Diseases
- Intensive Care Medicine
- Leukaemia
- Lymphoma
- Metabolic Disorders
- Obesity
- Ophtalmology
- Osteoporosis
- Respiratory Disorders
- Rheumatoid Arthritis
- Skin Cancer
- Transplantation

## R&D Pipeline

- **Oncology:** solid tumours, metastatic cancers, breast cancer, bladder cancer, head & neck cancer, melanoma, ovarian cancer, pancreatic cancer, leukaemia, prostate cancer, lung cancer
- **Immunology:** asthma, autoimmune /inflammatory diseases, food allergy, Crohn's disease
- **Ophthalmology:** diabetic macular edema, macular degeneration, geographic atrophy
- **Infectious Diseases:** Hepatitis, influenza,
- **Metabolic Diseases**
- **Neuroscience:** Alzheimer's, Autism, cognitive impairment, psychiatric disorders, Parkinson's, Huntington's

# Pfizer UK

“We strive to set the standard for quality, safety, and value in the discovery, development, and manufacture of medicines and vaccines that have the potential to save lives, prevent illness and improve health and wellbeing.

But we don’t achieve this alone. Collaborations with healthcare providers, patient communities, academia, and policy makers are fundamental to bringing new medicines to patients.”

## Headquarters

Pfizer UK Walton Oaks, Surrey	
Telephone	
Staff	2,500
UK Locations	Cambridge, Walton Oaks, Sandwich, Hurley & Havant
Turnover	£850.3m
Website	<a href="https://www.pfizer.co.uk/">https://www.pfizer.co.uk/</a>

## Treatment Areas

- Anti-Infectives: over 80 anti-infective medicines, antibiotics, anti-fungal, anti-virals
- Inflammation & Immunology: rheumatoid arthritis, ulcerative colitis
- Internal medicine: metabolic disease, cardiovascular disease, diabetes, cachexia, steatohepatitis, fatty liver disease
- Oncology: cancer treatment
- Rare diseases: affect 3.5 million people in the UK, only 5% of rare diseases have an available treatment
- Vaccines: prevent bacterial infections, eg Pneumonia, meningitis

## R&D Pipeline

- Anti-Infectives: Antimicrobial Resistance
- Inflammation & Immunology: rheumatology, gastroenterology, dermatology, restoration of immune system & tissue health
- Internal medicine: treatment of metabolic abnormalities, more targeted therapies, control of eating disorder, non-alcoholic fatty liver disease & steatohepatitis
- Oncology: develop more targeted and sophisticated treatments, rare cancers
- Rare diseases: advance gene therapy treatments
- Vaccines: infectious diseases, maternal immunisation, cancer vaccines

Pfizer in the UK:  
<https://youtu.be/J8r9WcM9B14>

# Merck Sharp & Dohme Ltd

“Our mission is simple: support our people, collaborate with our partners, do it all for our patients - and continue Inventing for Life.”

## UK Headquarters

Merck Sharp & Dohme Ltd UK Hertford Rd, Hoddesdon EN11 9BU	
Telephone +44 1992 467272	
UK Locations	5 Sites: Hoddesdon, London, Milton Keynes, Cramlington, Edinburgh
UK Staff	2,000
Global HQ	Kenilworth, NJ, USA
Turnover	£748.4m
Website	<a href="https://www.msd-uk.com/">https://www.msd-uk.com/</a>

## Treatment Areas

- Cardiovascular
- Endocrinology
- Immunology
- Infectious disease
- Neuroscience
- Oncology
- Respiratory
- Urology
- Vaccines
- Women's Health

## R&D

- Infectious Disease: HIV, bacterial infection
- Cardiovascular disease: Heart failure
- Neuroscience: Schizophrenia
- Oncology: Melanoma, colorectal cancer, breast, cervical, solid tumour, biliary tract cancer, gastric, liver, prostate, ovarian, mesothelioma, lung, bladder, endometrial, pancreatic
- Respiratory & Immunology: Neurofibromatosis, Syncytial virus, cough
- Vaccine: Cytomegalovirus, pneumoconjugate, Ebola

# Bayer PLC

“Bayer is a global enterprise with core competencies in the Life Science fields of health care and agriculture. Its products and services are designed to benefit people and improve their quality of life. “

“In 2018 we invested a total of €5.2 billion in research and development.”

## UK Headquarters

Bayer PLC 400 S Oak Way, Reading RG2 6AD	
Telephone +44 118 206 3000	
UK Locations	Reading & Cambridge
Turnover	£720.4m
Website	<a href="https://www.bayer.co.uk/">https://www.bayer.co.uk/</a>

## Treatment Areas

### Prescription:

- Haematology
- Neurology
- Oncology
- Ophthalmology
- Cardiology
- Women’s health
- Radiology

### Over The Counter:

- Travel health
- Women’s health
- Analgesics
- Digestive health
- Skincare
- Nutrition
- Allergy
- Foot care

## R&D

- **Cardiovascular & Kidney Diseases:** Chronic Kidney Disease, Thrombosis, Heart Failure, Artery Disease, Diabetes, Renal Anemia
- **Oncology:** Cancer, Lymphoma, Prostate
- **Gynecology:** Endometriosis, contraception, Fibroids
- **Hemophilia:** Gene therapy
- **Others:** Acute Respiratory Distress Syndrome, COPD, Cough, Obstructive sleep Apnea, Rheumatoid Arthritis

# Novartis Pharmaceuticals UK Ltd

At Novartis, our focus is on innovating to address the most significant unmet needs of patients and societies in the UK and worldwide. We are harnessing our heritage of advancing medical science to reimagine how we fight disease and how we deliver treatments to the millions of people in the UK who need them.

We are Novartis, and we are reimagining medicine.

“Since 2014, we have invested over £200 million on research and development in the UK”

## Headquarters

Novartis pharmaceuticals UK Ltd 2nd Floor, The WestWorks Building, White City Place, 195 Wood Lane, London, W12 7FQ	
Telephone +44 1276 692255	
Staff	1,300
UK Locations	London, Surrey, Lincolnshire
Turnover	£631.1m
Website	<a href="https://www.novartis.co.uk/">https://www.novartis.co.uk/</a>

## Treatment Areas

- **Oncology:** Advanced breast cancer, Melanoma, Neuroendocrine tumours (NETs), Acute and Chronic Myeloid Leukaemia, Myelofibrosis and Polycythaemia Vera (MPNS), Lung cancer, Renal cell carcinoma, Immune thrombocytopenia
- **Cardiovascular, renal & metabolism**
- **Respiratory & Inflammation**
- **Immunology, Hepatology & Dermatology**
- **Neuroscience:** Migraine, MS, Alzheimer’s, Parkinson’s epilepsy, ADHD, Ophthalmic medicines

## R&D

- **R&D**
- **Oncology**
- **Cell & Gene Therapy:** blood borne cancers, sickle cell disease, thalassaemia, other diseases of the blood
- **Respiratory & Inflammation:** COPD, allergic asthma, chronic spontaneous uricaria
- **Dermatology, rheumatology**
- **Neuro science:** MS, Alzheimer’s, neuromuscular therapies, human genetics
- **Rare Diseases:** TSC, Cushing’s disease

# Smith & Nephew

“Smith+Nephew is a global leading portfolio medical technology business. We care, we collaborate and we have courage as we work to help people live Life Unlimited”

## Headquarters

Smith & Nephew Croxley Park, Building 5, Hatters Lane, Watford, Hertfordshire WD18 8YE	
Telephone	
Staff	16,000 globally
UK Locations	Watford & Hull
Turnover	£3.8bn
Website	<a href="https://www.smith-nephew.com/">https://www.smith-nephew.com/</a>

## Wound Management

- Reduce the risk of seroma, haematoma, dehiscence and infection after surgery
- Promote autolytic debridement
- Dressings that are effective against over 150 pathogens and can be bactericidal in 30 minutes
- Prevention of pressure ulcers

## Joint replacement

- Hip, knee and shoulder joints as well as ancillary products such as bone cement.

## Sports Medicine

- Broad array of instruments, technologies and implants to perform minimally invasive surgery of the joints, including:
  - Repair of soft tissue injuries
  - Degenerative conditions of the knee, hip and shoulder.

## Ear, Nose, Throat

- Tonsil and Adenoid Wands
- Sinus surgery
- Epistaxis devices
- Septoplasty and turbinate reduction surgeries
- Removal of tissue in surgical procedures of Laryngeal and soft palate anatomy.

# AAH pharmaceuticals Ltd

“A healthier world where people can live life to the fullest.

Delivering over 15 million items per week to more than 14,000 pharmaceuticalcies and other organisations, AAH is the largest pharmaceutical wholesaler within the UK and operate from 16 modern distribution centres.”

## Headquarters

AAH pharmaceuticals Ltd  
Sapphire Court, Walsgrave Triangle, Coventry CV2 2TX

Telephone

Subsidiary of McKesson Cooperation

UK Staff 21,000

Locations 16 distribution centres - (<http://www.aah.co.uk/shop/en-GB/aahpoint/locations>)

Turnover £3.4bn

Website <http://www.aah.co.uk/>

Product catalogue

<https://www.aah.co.uk/resource/blob/27926/5e14c25b7d338033c0b202d3824a8fac/otc-may-catalogue-data.pdf>

# Vertex pharmaceuticals (Europe) Ltd

“Vertex creates new possibilities in medicine to cure diseases and improve people’s lives. We work with leading researchers, doctors, public health experts and other collaborators who share our vision for transforming the lives of people with serious diseases, their families and society.”

## Collaboration Defines Our Culture

“Vertex realizes that collaborating with the world’s experts is a cornerstone to solving some of science’s most difficult problems. It defines our culture. Externally, our collaborations with companies, academia, research organizations and nonprofit organizations help drive scientific innovation and the development of new medicines.”

### UK Headquarters

Vertex pharmaceuticals (Europe) Ltd  
2 Kingdom Street, London, W2 6BD

Telephone +44 2032 045100

R&D: Abingdon, Oxon, UK  
86-88 Jubilee Avenue, Milton Park, Abingdon, Oxfordshire OX14 4RW  
Tel: +44 (0) 545-554-4343

Corporate HQ: Boston, US

Turnover £1.8bn

Website <https://www.vrtx.com/>

### R&D Pipeline

- Cystic Fibrosis
- Pain
- Hemoglobinopathies: Sickle Cell Disease
- Antitrypsin Deficiency
- Kidney Disease
- Muscular Dystrophy

### Approved Medicine

- Trikafta
  - Symdeko
  - Orkambi
  - Kalydeco
- All for treatment of cystic fibrosis



# IQVIA UK

“IQVIA is a world leader in using data, technology, advanced analytics and human expertise to help customers drive healthcare - and human health - forward. Together with the life sciences and NHS stakeholders we serve, we are enabling a more modern, more effective and more efficient healthcare system, and creating breakthrough solutions that transform business and patient outcomes.”

## UK Headquarters

**IQVIA UK**  
210 Pentonville Rd, London N1 9JY

1 Quayside, Cambridge CB5 8AB  
Telephone +44 1223 350553

Bishop Meadow Rd, Loughborough LE11 5RE  
Telephone +44 20 3075 5000

**Headquarters** Danbury, Connecticut, US

**Turnover** £1.1bn

**Website** <https://www.iqvia.com/>

## IQVIA Joins Landmark UK Health Data Digital Initiative

IQVIA will deliver technology and capabilities to support DATA-CAN, the new national Health Data Research Hub for Cancer, to improve outcomes for NHS cancer patients.

Realising the UK’s potential to be a unique Life Sciences centre of excellence  
<https://www.youtube.com/watch?v=da8730R8Ndo&list=PLbAr7MAaEbwOithDcqSWcHVZMRgQpqgTw>

R&D Solutions in the UK  
<https://www.youtube.com/watch?v=udi0HLGPavs&list=PLbAr7MAaEbwOithDcqSWcHVZMRgQpqgTw&index=3>

# Appendix

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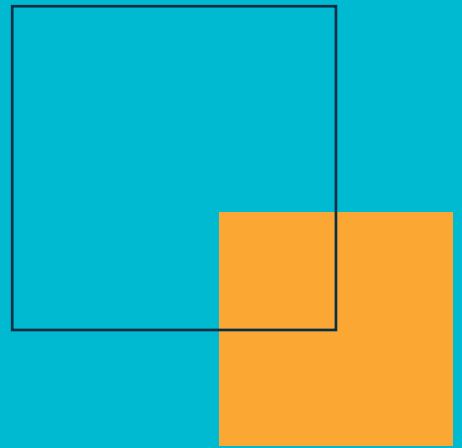
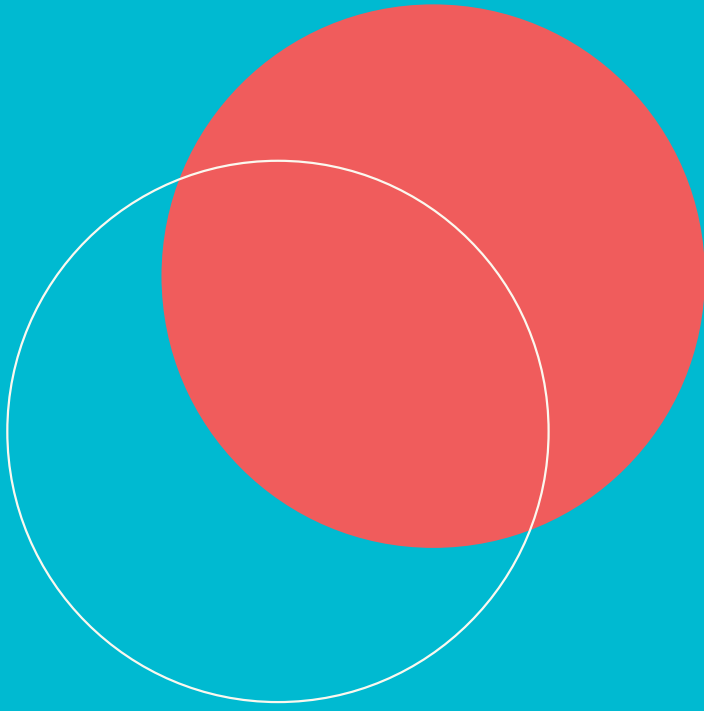
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Web-searches: pharmaceutical company websites, relevant stakeholder websites

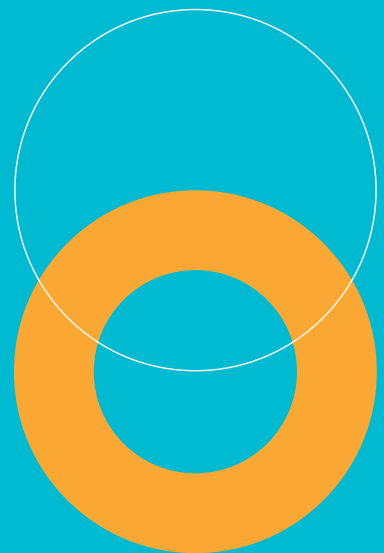
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# List of Organisations and Associations

ABPI:	Association of the British pharmaceuticalceutical Industry
BIA:	Bio Industries Association
ABHI:	Association of British Healthcare Industry
BGMA:	British Generics Manufacturers Association
BIO now:	Organisation supporting the biomedical, pharmaceutical and life sciences sectors across the North of England
BIVDA:	British in Vitro Diagnostics Association
EFPIA:	European Federation of pharmaceuticalceutical Industries & Associations
IFPMA:	International Federation of pharmaceuticalceutical Manufacturers & Associations
EEF:	Engineering Employers Federation UK
NEPIC:	North East of England Process Industry Cluster
NICE:	National Institute for Health & Care Excellence
PPRS:	Pharmaceuticalceutical Price Regulation Scheme
OBN:	Oxford Biotech Network



Pharmaceutical  
Companies by  
UK Region



## Home Counties

[A Nelson & Co LTD](#)

[AbbVie](#)

[Actelion pharmaceuticals UK LTD](#)

[Actimed Therapeutics](#)

[Adephi Manufacturing Company Ltd](#)

[Advanced Clinical](#)

[Aesica pharmaceuticals LTD](#)

[Allergy Therapeutics \(UK\) LTD](#)

[Alnylam pharmaceuticals](#)

[Altacor](#)

[Ananta Medicare LTD](#)

[AnGes](#)

[Angle plc](#)

[Antikor Biopharmaceutical](#)

[Applied Exomics](#)

[Aspire pharmaceutical LTD](#)

[Astellas pharmaceutical Ltd](#)

[AstraZeneca](#)

[Atnahs pharmaceutical UK LTD](#)

[Autifony Therapeutics](#)

[Avanos Medical](#)

[Avempace Ltd](#)

[Aventis pharmaceutical LTD](#)

[BBI Solutions](#)

[Besins Healthcare \(UK\) LTD](#)

[Bio Products Laboratory](#)

[Biomarin \(U.K\) LTD](#)

[Bristol Laboratories Ltd](#)

[Britannia pharmaceuticals](#)

[Brown & Burk UK Ltd](#)

[Centauri Therapeutics](#)

[Charles River Laboratories](#)

[Chemidex pharmaceutical Ltd](#)

[Chugai pharmaceutical U.K LTD](#)

[Clinimed \(Holdings\) LTD](#)

[Combe International Ltd](#)

[Consilient Health](#)

[Consort Medical PLC](#)

[ConvaTec](#)

[Courtin and Warner LTD](#)

[Cresset Biomolecular Discovery LTD](#)

[CryoLife](#)

[CSL Behring UK Ltd](#)

[Curadev](#)

[Custom Healthcare LTD](#)

[Custom pharmaceuticals LTD](#)

[D.D.D LTD](#)

[Destiny pharmaceutical Plc](#)

[Dr. Max pharmaceutical LTD](#)

[Eisai](#)

[Emas pharmaceutical LTD](#)

[Emergent Countermeasures International LTD](#)

[Ergomed](#)

[Essential pharmaceutical Ltd](#)

[Flynn pharmaceutical \(holdings\) LTD](#)

[Freeline Therapeutics](#)

[Fresenius Kabi Oncology PLC](#)

[Galderma \(U.K\) LTD](#)

[Galvani Bioelectronics](#)

[GB pharmaceutical LTD](#)

[GE Healthcare Ltd](#)

[General pharmaceuticals Ltd](#)

## Home Counties

Gilead Sciences LTD

GlaxoSmithKline plc

Grifols UK LTD

Gyroscope Therapeutics

Hartington pharmaceutical LTD

Hikma pharmaceuticals PLC

HOX Therapeutics

Hypha Discovery

Immune Regulation LTD

Indivior

Janssen-Cilag LTD

KaNdy Therapeutics

Kasocio

Kobayashi Healthcare Europe LTD

Komtur pharmaceuticals Uk Ltd

Labco LTD

Laleham Health and Beauty LTD

Lonza

Mallinckrodt pharmaceuticals Ltd

Marlborough pharmaceuticals LTD

Mediwin LTD

Medpharm LTD

Medreich plc

Merck Serong Ltd

Merz pharmaceutical UK LTD

Mevion Medical Systems

Microsaic Systems

Millpore (UK) Ltd

Miltenyi Biotec LTD

MW Encap LTD

NeRRe Therapeutics

Nextpharmaceutical Technologies Holding LTD

Niche Generics LTD

Novartis pharmaceuticals UK LTD

Novo Nordisk Ltd

Omega pharmaceutical LTD

Ossianix

Penlan Healthcare LTD

Peprotech EC LTD

Pfizer

pharmaceutical Modus LTD

pharmaceuticalcare (Europe) Ltd

pharmaceuticalron

pharmaceuticalsure LTD

pharmaceuticalthen U.K LTD

Pharmidex pharmaceutical Services LTD

PharSafer

Philip Chapper & Company LTD

Plasticell

Quotient Sciences

Regent pharmaceuticals LTD

Relonchem LTD

ReViral

Sandoz LTD

Sanofi-Synthelabo LTD

Seqirus

Shire pharmaceuticals LTD

Sigma pharmaceuticals PLC

Silence Therapeutics PLC

Simbec-Orion Group

Sinclair pharmaceutical LTD

Sisaf

Smith & Nephew PLC

Stragen Uk Ltd

## Home Counties

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Strides pharmaceutical UK LTD

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Sunovion pharmaceuticals Europe LTD

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Syneos Health IVH UK LTD

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Syner-Med (pharmaceutical Products) LTD

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Takeda UK LTD

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Theragnostics

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TTP Group PLC

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TTP Labtech

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UCB-celltech

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Vectura Group Services LTD

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Verisfield (UK) LTD

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Vertex pharmaceuticals (Europe) LTD

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Verton pharmaceutical Ltd

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## London

[Acrogenomics](#)

[Adaptate Biotherapeutics](#)

[Advanz pharmaceutical](#)

[Akari Therapeutics](#)

[Alacrita](#)

[AMO pharmaceutical](#)

[Amryt pharmaceutical](#)

[Apcer Life Sciences](#)

[Apta Biosciences](#)

[Arix Bioscience](#)

[Autolus Therapeutics](#)

[Avillion](#)

[Axxin](#)

[Benevolent AI](#)

[Bioaxis Healthcare](#)

[BioMarin pharmaceutical](#)

[Biotechnol](#)

[BTG plc](#)

[Capella Bioscience](#)

[Cell Medica](#)

[Clinical Metadata](#)

[Closed Loop Medicine](#)

[Compass Pathways](#)

[DDi](#)

[Desktop Genetics](#)

[DNAe](#)

[Engitix](#)

[Ervaxx](#)

[Fosun pharmaceutical](#)

[GammaDelta Therapeutics](#)

[Genactis](#)

[GTN](#)

[GW pharmaceuticals](#)

[Helperby Therapeutics](#)

[HemoGenyx pharmaceuticals](#)

[Hikma](#)

[hVIVO](#)

[ILLUSTRATUM](#)

[Immupharmaceutical](#)

[Inoviv](#)

[Intract pharmaceutical](#)

[Kinapse](#)

[LabGenius](#)

[LivaNova](#)

[Londonpharmaceutical](#)

[MeiraGTx](#)

[Mendelian](#)

[Mereo Biopharmaceutical](#)

[MiNA Therapeutics](#)

[Nanomerics](#)

[Novasecta](#)

[Orchard Therapeutics](#)

[Outpost Medicine](#)

[Parasym Health](#)

[Parexel](#)

[Pharmidex](#)

[PHASTAR](#)

[PrEP Biopharm](#)

[ProClinical Consulting](#)

[Prokarium](#)

[Proteome Sciences](#)

[Pulmocide](#)

[RareMoon Consulting](#)

[Rasna Therapeutics](#)



## London

[ReGen Therapeutics](#)

[Rexgenero](#)

[Richmond pharmaceuticalcology](#)

[Seven Bridges Genomics](#)

[Shield Therapeutics](#)

[Silence Therapeutics](#)

[Sinclair pharmaceutical](#)

[Small pharmaceutical](#)

[Smith and Nephew](#)

[Sprim](#)

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[Synthace](#)

[Therakind](#)

[Theramex](#)

[Tiziana Life Sciences](#)

[Topivert](#)

[Treos Bio](#)

[UBC](#)

[ValiRx](#)

[Vectura](#)

[Veramed](#)

[Verona pharmaceutical](#)

[Viramal](#)

[Virion Biotherapeutics](#)

## Cambridge & South East

[abcodia](#)

[Abzena](#)

[Acacia pharmaceutical](#)

[Affitech](#)

[Arecor](#)

[Artios pharmaceutical](#)

[Astex pharmaceuticals](#)

[AstraZeneca](#)

[Atlantic Healthcare](#)

[Avacta Group](#)

[Axol Bioscience](#)

[Azeria Therapeutics](#)

[Bicycle Therapeutics](#)

[Bio Health LTD](#)

[Bio Pathica LTD](#)

[Biofidelity](#)

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[Bit Bio](#)

[Camallergy](#)

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[Cambridge Epigenetix](#)

[Cambridge Protein Arrays](#)

[Cantabio pharmaceuticals](#)

[Cell Guidance Systems](#)

[CellCentric](#)

[Charles River Laboratories](#)

[Clovis Oncology](#)

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[Colorcon LTD](#)

[Congenica](#)

[Crescendo Biologics](#)

[Cypralis](#)

[Cytocell](#)

[Daval International LTD](#)

[DefiniGEN](#)

[DiagNodus](#)

[Eagle Genomics](#)

[Ennogen Healthcare LTD](#)

[Epsilon-3 Bio](#)

[Erba MDX](#)

[Expedeon](#)

[f-star](#)

[Genestack](#)

[GW pharmaceuticals](#)

[Healx](#)

[Horizon Discovery](#)

[ImmunoBiology](#)

[Inivata](#)

[lontas](#)

[lota pharmaceuticals](#)

[Isogenica](#)

[Isomerase Therapeutics](#)

[Kymab](#)

[Lab21](#)

[LEUCID BIO](#)

[LIFNano Therapeutics](#)

[Lightcast Discovery](#)

[Lonza](#)

[Metrion Biosciences](#)

[Microbiotica](#)

[Mission Therapeutics](#)

[Mogrify](#)

[Morphogen-IX](#)

## Cambridge & South East

[Mundipharma](#)

[Nanna Therapeutics](#)

[Napp pharmaceutical](#)

[Nemesis Bioscience](#)

[NeoPhore](#)

[New Nordic LTD](#)

[NodThera](#)

[Numedicus](#)

[OncoLytika](#)

[Optibrium](#)

[Origin Sciences](#)

[Oval Medical Technologies](#)

[Owlstone Medical](#)

[OxStem](#)

[Paion](#)

[Pfizer Consumer Healthcare](#)

[Pfizer LTD](#)

[Phico Therapeutics](#)

[Phoremest](#)

[PolyProx Therapeutics](#)

[PredictImmune](#)

[ProMetic Life Sciences](#)

[Recombinant Antibody Technology](#)

[Sano Genetics](#)

[Sanofi Genzyme](#)

[Sareum](#)

[Selvita](#)

[Sentinel Oncology](#)

[Septodont LTD](#)

[Storm Therapeutics](#)

[Synbiosis](#)

[Syngene](#)

[Talisman Therapeutics](#)

[The Micron Group](#)

[Vectura](#)

[Vernalis Research](#)

[Vhsquared](#)

[Wren Therapeutics](#)

[Ziath](#)

## Oxford & Thames Valley

[Abbott Healthcare Products Ltd](#)

[Abbott Laboratories Ltd](#)

[Abbvie Ltd](#)

[Absolute Antibody](#)

[Accentus Medical](#)

[Adaptix](#)

[Allergan Ltd](#)

[Alliance pharmaceuticals Ltd](#)

[Aptuit](#)

[Arctoris](#)

[Argonaut Therapeutics](#)

[Biogen Idec Ltd](#)

[Blue Earth Diagnostics](#)

[Bray Group Ltd](#)

[Calcico Therapeutics](#)

[Carrick Therapeutics](#)

[Catalent CTS Ltd](#)

[Charles River Laboratories](#)

[Chronos Therapeutics](#)

[Circassia pharmaceuticals](#)

[Cytos](#)

[Daiichi Sankyo UK Ltd](#)

[DJS Antibodies](#)

[Dr Falk pharmaceutical UK Ltd](#)

[Evos Therapeutics](#)

[Genomics PLC](#)

[Grey Wolf Therapeutics](#)

[Honeywood Ltd](#)

[Hospira UK Ltd](#)

[Intrapharm Laboratories Ltd](#)

[Izana Bioscience](#)

[Karus Therapeutics](#)

[Leo Laboratories Ltd](#)

[Lincoln Medical Ltd](#)

[Ludger](#)

[McNeil Healthcare \(UK\) Ltd](#)

[MiroBio](#)

[Momentum Bioscience](#)

[MSD Vaccines Ltd](#)

[Murex Biotech Ltd](#)

[Native Antigen Company](#)

[OMass Therapeutics](#)

[Orbit Discovery](#)

[OrganOx](#)

[Oxehealth](#)

[Oxford BioDynamics](#)

[Oxford Biomedica](#)

[Oxford Brain Diagnostics](#)

[Oxford Cancer Biomarkers](#)

[Oxford Drug Design](#)

[Oxford Gene Technology](#)

[Oxford Nanopore](#)

[Oxford Vacmedix](#)

[Oxonium Therapeutics](#)

[P1vital](#)

[Patheon UK Ltd](#)

[Peckforton pharmaceuticals Ltd](#)

[Perspectum Diagnostics](#)

[Physiomics](#)

[Pivotal Scientific](#)

[Proimmune](#)

[Recordati Rare Diseases UK Ltd](#)

[Sanofi Genzyme](#)

[Scancell](#)

## Oxford & Thames Valley

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Seqirus UK Ltd

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Sitryx

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Synairgen plc

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Theolytics

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Transdermal Ltd

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Vaccitech

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Valo Therapeutics

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Vantia Ltd

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Vectura Group plc

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## Birmingham & Midlands

[3P Innovation Ltd](#)

[Albumedix](#)

[AOP Orphan Diseases](#)

[Aurelia Bioscience](#)

[Biocomposites \(UK\) Ltd](#)

[Bio-Diagnostics](#)

[Celixir](#)

[Chembiotech Laboratories](#)

[Cobra Biologics Ltd](#)

[Copley Scientific](#)

[Corpus Nostrum Ltd](#)

[Dexcel pharmaceutical Ltd](#)

[DiscoverRx](#)

[Enterprise Therapeutics](#)

[Fontis Health Ltd](#)

[Guerbet Laboratories Ltd](#)

[HFA Healthcare Products Ltd](#)

[Locate Bio](#)

[Medherant](#)

[MeDiNova Research](#)

[Morningside pharmaceuticals Ltd](#)

[Movianto UK Ltd](#)

[Norbrook Holdings Ltd](#)

[Oncimmune](#)

[Parexel](#)

[pharmaceuticalspec Ltd](#)

[Polar Speed Distribution Ltd](#)

[Quest Vitamins Ltd](#)

[S.T.D. pharmaceutical Products Ltd](#)

[Severn Biotech](#)

[Source BioScience](#)

[Sterling pharmaceuticals Ltd](#)

[Sygnature Discovery](#)

[TCS Biosciences Ltd](#)

[Tebu Bio Ltd](#)

[The Binding Site](#)

[Thea pharmaceuticals Ltd](#)

[Tillomed Laboratories Ltd](#)

[TRB Chemedica \(UK\) Ltd](#)

[Viatem](#)

[Worldwide Clinical trials](#)

[XenoGesis](#)

## North West & North Wales

[Acorus Therapeutics Ltd](#)

[ADC Biotechnology](#)

[Allergan](#)

[Arcis Biotechnology](#)

[AstraZeneca](#)

[Ayrton Saunders Ltd](#)

[Bell's Healthcare](#)

[Biocomposites](#)

[BiVictriX Therapeutics](#)

[Blueberry Therapeutics](#)

[Brooks Life Sciences](#)

[C P pharmaceuticals Ltd](#)

[C4X Discovery](#)

[Calea UK Ltd](#)

[Carbogen Amcis Ltd](#)

[Cellular Therapeutics Ltd](#)

[Chiesi Ltd](#)

[Cobra Biologics](#)

[Cogentix Medical](#)

[Concept Life Sciences](#)

[Cyprotex](#)

[Cytos](#)

[Eaststone Ltd](#)

[Elucigene Diagnostics](#)

[Epistem](#)

[Evgen pharmaceutical](#)

[f2g](#)

[Fresenius Kabi Ltd](#)

[Gaeta Therapeutics](#)

[Geistlich Sons Ltd](#)

[Gentronix](#)

[HL Healthcare Ltd](#)

[Hologic Ltd](#)

[Ipsen Biopharm Ltd](#)

[IS pharmaceuticals Ltd](#)

[Lightpoint Medical](#)

[M&A pharmaceuticalchem Ltd](#)

[MAC Clinical Research](#)

[Marksans pharmaceutical UK Ltd](#)

[Mast Group Ltd](#)

[Medherant](#)

[Medimmune UK Ltd](#)

[MeDiNova Research](#)

[Molnlycke Heath Care Ltd](#)

[N4 pharmaceutical](#)

[Nupharm Ltd](#)

[OBG pharmaceuticals Ltd](#)

[Octapharmaceutical Ltd](#)

[Omnicell Ltd](#)

[Oxyrane](#)

[pharmaceuticalcol Ltd](#)

[pharmaceuticalserve \(North West\) Ltd](#)

[Phoenix Healthcare Distribution Ltd](#)

[Pierre Fabre Ltd](#)

[Proteintech](#)

[Proveca Ltd](#)

[Quay pharmaceuticals Ltd](#)

[Ransom Naturals Ltd](#)

[Reciparm Ltd](#)

[SHS International Ltd](#)

[Sinclair pharmaceuticals Ltd](#)

[Sygnature Discovery](#)

[Vision pharmaceuticals Ltd](#)

[WideCELLS](#)

## North West & North Wales

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Wise pharmaceuticals Ltd

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Wockardt UK Ltd

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Yourgene Health

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## North East & Yorkshire

[4d pharmaceutical](#)

[Alcyomics](#)

[Aptamer Group](#)

[Arterius](#)

[Atelerix](#)

[Avacta Group PLC](#)

[Benchmark Vaccines LTD](#)

[bingdon Health](#)

[Bio-Tech Solutions LTD](#)

[Cephalon \(UK\) LTD](#)

[Certara](#)

[Chromocyte](#)

[Complement Genomics](#)

[Covance Laboratories LTD](#)

[Dalkeith Laboratories LTD](#)

[Dr. Reddy's Laboratories \(UK\) LTD](#)

[DX Products LTD](#)

[Essential Nutrition LTD](#)

[e-Therapeutics](#)

[Ferndale pharmaceuticals LTD](#)

[Genus pharmaceuticals LTD](#)

[Herbal Concepts LTD](#)

[Iksuda Therapeutics](#)

[Internis pharmaceuticals LTD](#)

[Jenavalve](#)

[Keapstone Therapeutics](#)

[MedSource](#)

[nanoTherics](#)

[Neoceuticals LTD](#)

[OptiBiotix](#)

[Orla Protein Technologies](#)

[OTC Concepts LTD](#)

[QuantuMDx](#)

[Rinri Therapeutics](#)

[Rosemont pharmaceuticals](#)

[Saluda Medical](#)

[SensaPharm](#)

[Smith and Nephew](#)

[Technostics LTD](#)

[Teva Laboratories UK LTD](#)

[Thornton & Ross LTD](#)

[Thorpe Laboratories LTD](#)

[Tissue Regenix](#)

## Scotland

[Abartron LTD](#)

[AdoRx Therapeutics](#)

[Agilent](#)

[Albany Molecular Research \(Glasgow\) LTD](#)

[AorTech](#)

[Aquila BioMedical](#)

[AstraZeneca](#)

[aTen Therapeutics](#)

[Axis-Shield](#)

[Biogelx](#)

[Brainwave Discovery](#)

[Caldan Therapeutics](#)

[Cellon UK LTD](#)

[Clyde Biosciences](#)

[Cumulus Oncology](#)

[Cyclacel pharmaceuticals](#)

[Cypex LTD](#)

[DC Biosciences](#)

[E & O Laboratories LTD](#)

[Edinburgh Molecular Imaging](#)

[Elasmogen](#)

[EnteroBiotix](#)

[Exscientia](#)

[Ferring Controlled Therapeutics LTD](#)

[FIOS Genomics](#)

[GlaxoSmithKline](#)

[Glycologic LTD](#)

[Hyaltech LTD](#)

[Iceni pharmaceuticals](#)

[Invizius](#)

[KL pharmaceutical LTD](#)

[Meda pharmaceuticals LTD](#)

[NovaBiotics](#)

[NuCana](#)

[Parkure](#)

[Roslin Cells](#)

[SightScience](#)

[Sigma-Aldrich](#)

[Symbiosis pharmaceutical Services LTD](#)

[Synexus](#)

[Synpromics](#)

[TauRx Therapeutics](#)

[TC Biopharm](#)

[Ubiquigent](#)

## Northern Ireland

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Almac Group LTD

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Almac Sciences LTD

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Axial3D

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BBI Solutions

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Biocolor LTD

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Celerion

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Diaceutics

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Exploristics

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Fusion Antibodies

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Galen LTD

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Learndon Solutions

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Phion Therapeutics

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ProAxis

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Radox Biosciences

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Radox Laboratories

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Terumo BCT LTD

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# UK Pharmaceutical Contract Manufacturing Companies

## CDMO

- Aesica pharmaceuticals
- Almac Group
- ARCINOVA
- Cobra Biologics
- Custom pharmaceutical Services, Dr.Reddys laboratories Ltd
- Dechra pharmaceuticals Manufacturing
- Dextra Laboratories
- MedPharm
- Moorfields pharmaceuticals
- Nupharm Group
- pharmaceuticalerals Ltd
- Quay pharmaceutical
- Symbiosis pharmaceutical Services
- Upperton pharmaceutical Solutions

## Contract Manufacturing

- Abzena
- Aesica pharmaceuticals
- Almac Group
- ARCINOVA
- Cobra Biologics
- Dechra pharmaceuticals Manufacturing
- Dextra Laboratories
- Helapet Limited
- Lupin Limited
- MedPharm
- Moorfields pharmaceuticals
- Onyx Scientific, Ltd.
- Penn pharmaceutical
- pharmaceuticalerals Ltd
- Quay pharmaceutical
- Randox Laboratories Ltd.
- Sekisui
- Symbiosis pharmaceutical Services
- Wasdell Manufacturing Ltd

Source: [https://www.contractpharmaceutical.com/csd/C\\_GB/contract-services-directory/](https://www.contractpharmaceutical.com/csd/C_GB/contract-services-directory/)

# Members of the British Generics Manufacturing Association

## Members

- Accord Healthcare (Barnstable, Devon)
  - <https://www.accord-healthcare.com/uk>
- Advanz pharmaceutical (London)
  - <https://abcurl.advanzpharmaceutical.com/>
- Aspire pharmaceutical (Petersfield, Hampshire)
  - <http://aspirepharmaceutical.co.uk/>
- Aristo pharmaceutical Ltd (Ely)
  - <http://aristopharmaceutical.com/>
- Aurobindo (Ruislip)
  - <https://www.aurobindo.com/>
- Bowmed Ibisqus
  - <https://bowmed.com/>
- B Braun (Sheffield)
  - <https://www.bbraun.co.uk/>
- Brown & Burk (Hounslow)
  - <https://www.bbukltd.com/>
- Ethypharm (Romford)
  - <https://www.ethypharm.co.uk/>
- Bristol Laboratories(Berkhamsted & Luton)
  - <https://bristol-labs.co.uk/>
- Consilient Health pharmaceuticals (Richmond)
  - <https://www.consilienthealth.com/>
- Creo Medical (Chepstow, Wales)
  - <https://creomedical.com/>
- Dexcel pharmaceutical (Daventry)
  - <https://dexcel.com/>
- Dr Reddy's (Beverley, East Yorkshire)
  - <https://www.drreddys.com/united-kingdom/>
- Fresenius Kabi (Runcorn, Cheshire)
  - <https://www.fresenius-kabi.com/gb/>
- Genisis pharmaceuticals (London)
  - <https://www.genesis-pharmaceutical.com/>
- Glenmark (Watford)
  - <https://www.glenmarkpharmaceutical.com/>
- Hameln (Gloucester)
  - <https://www.hameln.co.uk/>
- Kent pharmaceuticals(Ashford)
  - <http://www.kentpharm.co.uk/>
- Lupin (Slough)
  - <https://www.lupinhealthcare.co.uk/>
- Medac (Stirling)
  - <https://medacpharmaceutical.co.uk/>
- Morningside Healthcare (Leicester)
  - <http://www.morningsidehealthcare.com/>
- Mylan (Hatfield)
  - <https://www.mylan.co.uk/>
- Niche Generics Ltd (Hitchin)
  - <https://www.nichegenerics.com/>
- Par pharmaceutical (US HQ)
  - <https://www.parpharm.com/>
- Rosemont (Leeds)
  - <https://www.rosemontpharmaceutical.com/>
- Sandoz (Camberley)
  - <https://www.sandoz.uk.com/>
- Teva pharmaceutical (Castleford)
  - <https://www.tevauk.com/>
- Thornton & Ross (Huddersfield)
  - <https://www.thorntonross.com/>
- Torrent pharmaceutical (Crawley)
  - <http://www.torrentpharmaceutical.co.uk/>
- Waymade (Basildon)
  - <https://www.waymade.co.uk/>
- Wockhardt (Wrexham)
  - <http://www.wockhardt.co.uk/>
- Xiromed (Swedish HQ)
  - <http://www.xiromed.nl/>
- Zentiva – a Sanofi Company (Guildford)
  - <https://www.zentiva.co.uk/>

<https://www.britishgenerics.co.uk/about-us/our-members>

## Members

# Members of the British Generics Manufacturing Association

## **Associate Members**

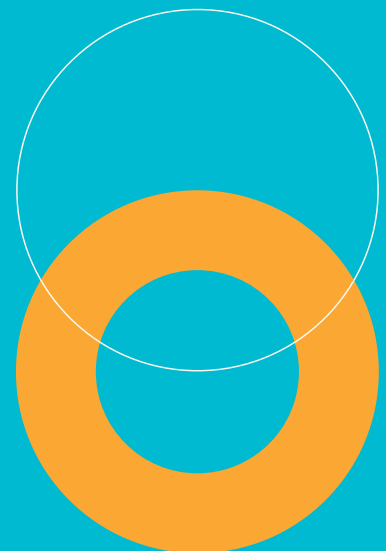
- Alliance Healthcare
- Broughton laboratories
- Custom pharmaceuticals
- Data Pharm
- Day Lewis pharmaceuticalcy
- FDAS
- McKesson
- Medreich
- Phoenix Group
- Wave Data
- Woodley Bioreg



# List of UK Pharmaceutical Eudra GMP Compliant Companies



**Search: GMP Compliance**  
**Date: 8th January 2020**  
**Total Records: 264**  
**De-duplicated Records: 230**



Site Name	Address 1	Address 2	City	Postcode
AAH pharmaceuticals LIMITED	CENTURION HOUSE, CENTURION PARK	WATLING STREET, WILNECOTE	TAMWORTH	B77 5PZ
ACCORD HEALTHCARE LIMITED	EDGEFIELD AVENUE		NEWCASTLE UPON TYNE	NE3 3NB
AESICA FORMULATION DEVELOPMENT LIMITED	BUILDING 55, NORTH ROAD		QUEENBOROUGH	ME11 5EL
Agrimin Limited	Arlanda Way	Humberside Airport	Kirmington	DN39 6YH
AIR LIQUIDE - BRISTOL	UNIT 110	BURCOTT ROAD, AVONMOUTH	BRISTOL	BS11 8AG
AIR PRODUCTS PLC	LANGMUIR ROAD	BARGEDDIE, BAILLIESTON	GLASGOW	G69 7TS
AIR PRODUCTS PLC	SALTEND LANE	HEDON	HULL	HU12 8PP
AIR PRODUCTS PLC	SHARP STREET	WALKDEN, WORSLEY	MANCHESTER	M28 3WA
ALLERGY THERAPEUTICS 2	UNIT A/B	DOMINION WAY	WORTHING	BN14 8NW
ALLIANCE MEDICAL RADIOpharmaceuticalCY LIMITED	KEELE UNIVERSITY SCIENCE PARK		KEELE	ST5 5BX
ALMAC CLINICAL SERVICES LIMITED	SEAGOE INDUSTRIAL ESTATE	9 CHARLESTOWN ROAD	CRAIGAVON	BT63 5PW
ALMAC pharmaceutical SERVICES LIMITED	SEAGOE INDUSTRIAL ESTATE, PORTADOWN		CRAIGAVON	BT63 5UA
ALPHA ANALYTICAL LABORATORIES LIMITED	EDISON POINT	143 MILLMARSH LANE	ENFIELD	EN3 7DS
Animal & Plant Health Agency (APHA)	Woodham Lane	New Haw	Addlestone	KT15 3NB
Animal Health Trust, Centre for Preventive Medicine	Lanwades Park		Kentford	CB8 7UU
Animax Ltd	Shepherds Grove West	Stanton	Suffolk	IP31 2AR
ANUPCO LIMITED	CROCKATT ROAD	HADLEIGH	IPSWICH	IP7 6RD
Aptuit (Edinburgh) Ltd	SIMPSON PARKWAY	KIRKTON CAMPUS	LIVINGSTON	EH54 7BH
ARC TRINOVA LIMITED	TAYLOR DRIVE		ALNWICK	NE66 2DH
ARCADIA pharmaceutical LIMITED	UNIT 3, BELL COURT, SWANSEA WEST BUSINESS PARK	FELINFACH, FFORESTFACH	SWANSEA	SA5 4HP
Argenta Dundee Limited	Kinnoull Road	Dunsinane Industrial Estate	Dundee	DD2 3XR
Armagh Road site	105 ARMAGH ROAD		NEWRY	BT35 6PU
ASPIRE pharmaceutical LIMITED	BELLAMY HOUSE	WINTON ROAD	PETERSFIELD	GU32 3HA
ASTRAZENECA UK LIMITED	SILK ROAD BUSINESS PARK		MACCLESFIELD	SK10 2NA



Site Name	Address 1	Address 2	City	Postcode
ASTRAZENECA UK LIMITED (CPU ALDERLEY)	1G49, MERESIDE	ALDERLEY PARK	MACCLESFIELD	SK10 4TG
AUXILIUM UK LIMITED	C/O SKADDEN, ARPS, SLATE, MEAGHER & FLOM (UK) LLP	40 BANK STREET	LONDON	E14 5DS
BARD pharmaceuticals LIMITED	UNIT 191, CAMBRIDGE SCIENCE PARK	MILTON ROAD	CAMBRIDGE	CB4 0GW
BAXTER HEALTHCARE LIMITED	CAXTON WAY		THETFORD	IP24 3SE
BAXTER HEALTHCARE LIMITED	UNIT B, TAURUS BUILDING	PETERLEY ROAD, COWLEY	OXFORD	OX4 2TZ
Benchmark Vaccines Limited	4 Warner Drive	Springwood Industrial Estate	Braintree	CM7 2YW
BIOFILM LIMITED	2 BELL DRIVE	HAMILTON INTERNATIONAL TECHNOLOGY PARK, BLANTYRE	GLASGOW	G72 0FB
BIOFORCE (UK) LIMITED	2 BREWSTER PLACE		IRVINE	KA11 5DD
BIORELIANCE LIMITED	STIRLING UNIVERSITY INNOVATION PARK	HILLFOOTS ROAD	STIRLING	FK9 4NF
Bio-Tech Solutions Limited	WINDMILL WORKS	KELLEYTHORPE INDUSTRIAL ESTATE	DRIFFIELD	YO25 9DJ
Bob Martin (UK) Limited	8 Wemberham Lane		Yatton	BS49 4BS
BOC BELFAST	PRINCE REGENT ROAD	CASTLEREAGH	BELFAST	BT5 6RW
BOC BRISTOL	WHITBY ROAD		BRISTOL	BS4 3QH
BOC HOLBROOK	NORTHERN TECHNICAL CENTRE	HOLBROOK INDUSTRIAL ESTATE	SHEFFIELD	S20 3RP
BOC LEEDS	GELDERD ROAD		LEEDS	LS12 6DG
BOC PLYMOUTH	MAXWELL ROAD	PRINCE ROCK	PLYMOUTH	PL4 0RT
Boehringer Ingelheim Animal Health UK Ltd	Ash Road		Pirbright	GU24 0NQ
BRISTOL LABORATORIES LIMITED	UNIT 3, CANALSIDE	NORTHBRIDGE ROAD	BERKHAMSTED	HP4 1EG
BRISTOL LABORATORIES LIMITED	LAPORTE WAY		LUTON	LU4 8WL
BRISTOL LABORATORIES LIMITED	UNIT 5, TRAYNOR WAY	WHITEHOUSE BUSINESS PARK	PETERLEE	SR8 2RU
BRITANNIA pharmaceuticals LIMITED	200 LONGWATER AVENUE	GREEN PARK	READING	RG2 6GP
BRUNEL HEALTHCARE MANUFACTURING LIMITED	WILLIAM NADIN WAY		SWADLINCOTE	DE11 0BB

Site Name	Address 1	Address 2	City	Postcode
BUCKINGHAMSHIRE HEALTHCARE NHS TRUST - STOKE MANDEVILLE HOSPITAL	STOKE MANDEVILLE HOSPITAL	MANDEVILLE ROAD	AYLESBURY	HP21 8AL
BURTON HOSPITALS NHS FOUNDATION TRUST	pharmaceuticalCY MANUFACTURING UNIT	QUEENS HOSPITAL, BELVEDERE ROAD	BURTON-ON-TRENT	DE13 0RB
C & N MEDICAL LIMITED	UNIT G-2, R D PARK	STEPHENSON CLOSE	HODDESDON	EN11 0BW
CALIGOR OPCO UK LIMITED	UNIT 8, MASTHEAD	CAPSTAN COURT, CROSSWAYS BUSINESS PARK	DARTFORD	DA2 6QG
Carnbane	FACTORY NO 4, CARNBANE INDUSTRIAL ESTATE		NEWRY	BT35 6QQ
Castex Products Ltd	Woodside Works	Weoodside Street	Derbyshire	SK22 3HF
CATALENT MICRON TECHNOLOGIES LIMITED	CROSSWAYS BOULEVARD	CROSSWAYS	DARTFORD	DA2 6QY
CATALENT UK SWINDON ZYDIS LIMITED	FRANKLAND ROAD	BLAGROVE	SWINDON	SN5 8RU
CEFAS	Weymouth Laboratory	Barrack Road	Weymouth	DT4 8UB
CELGENE EUROPE LIMITED	RIVERSIDE HOUSE	RIVERSIDE WALK	WINDSOR	SL4 1NA
CHRISTIE MEDICAL PHYSICS AND ENGINEERING	NORTH WESTERN MEDICAL PHYSICS	CHRISTIE HOSPITAL NHS FOUNDATION TRUST, WILMSLOW ROAD, WITHINGTON	MANCHESTER	M20 4BX
Clincial Biotechnology Centre	Bristol Institute for Transfusion Services	University of Bristol	Bristol	BS40 5DU
CLINICAL PET CENTRE	ST THOMAS HOSPITAL	WESTMINSTER BRIDGE ROAD	LONDON	SE1 7EH
CLINIGEN HEALTHCARE LIMITED	UNIT 3, CANADA ROAD	BYFLEET	WEST BYFLEET	KT14 7JL
Cloverleaf Industries Ltd	Stondon Farm	Ongar Road	Essex	CM15 0LD
COBRA BIOLOGICS LIMITED	STEPHENSON BUILDING	THE SCIENCE PARK	KEELE	ST5 5SP
Cod Beck Blenders Limited	Cod Beck Estate	Dalton	Thirsk	YO7 3HR
COMMUNITY pharmaceuticalCY SUPPLIES LIMITED	UNIT 20/21, EASTER PARK	BEAM REACH 8, FERRY LANE	RAINHAM	RM13 9BP
CONTRACT pharmaceutical SERVICES LTD	C/O BRUNEL HEALTHCARE MANUFACTURING LIMITED	WILLIAM NADIN WAY	SWADLINCOTE	DE11 0BB
CROSS VETPHARM GROUP UK LIMITED	UNIT 2	BRYN CEFNI	LLANGEFNI	LL77 7XA
CULTECH LIMITED	UNIT 3, CHRISTCHURCH ROAD	BAGLAN INDUSTRIAL PARK	PORT TALBOT	SA12 7BZ

Site Name	Address 1	Address 2	City	Postcode
Custom Powders Limited	GATEWAY		CREWE	CW1 6YT
DERMAL LABORATORIES LIMITED	SINGER WAY	WOBURN ROAD INDUSTRIAL ESTATE	KEMPSTON	MK42 7AG
DERMAL LABORATORIES LIMITED	TATMORE PLACE	GOSMORE	HITCHIN	SG4 7QR
Diversey UK Production Ltd	Cotes Park Industrial Estate	Somercotes	Derbyshire	DE55 4PA
Dorwest Herbs Limited	Parkway Farm Business Park	Middle Farm Way	Dorchester	DT1 3AR
DR REDDY'S LABORATORIES (UK) LIMITED	6 RIVERVIEW ROAD		BEVERLEY	HU17 0LD
DSM NUTRITIONAL PRODUCTS (UK) LIMITED	DELVES ROAD, HEANOR GATE INDUSTRIAL ESTATE		HEANOR	DE75 7SG
Ecolab Limited	Winnington Avenue		Northwich	CW8 3AA
ELANCO SPEKE OPERATIONS	FLEMING ROAD	SPEKE	LIVERPOOL	L24 9LN
ELI LILLY & COMPANY LIMITED	FLEMING ROAD	SPEKE	LIVERPOOL	L24 9LN
ESSENTIAL NUTRITION LIMITED	ESSENTIAL NUTRITION LIMITED, BANK HOUSE	SALTGROUNDS ROAD	BROUGH	HU15 1EG
EVANS VANODINE INTERNATIONAL PLC	BRIERLEY ROAD	WALTON SUMMIT	PRESTON	PR5 8AH
EXOVA (UK) LIMITED	PROVA COURT	17 DOMAN ROAD	CAMBERLEY	GU15 3DF
FAI Animal Health Centre	The Field Station	Wytham	Oxford	OX2 8QJ
FISHER CLINICAL SERVICES UK LIMITED	LANGHURSTWOOD ROAD		HORSHAM	RH12 4QD
Form Nutrition Ltd	First Avenue	Weston Road	Crewe	CW1 6BE
GARTNAVEL GENERAL HOSPITAL	PET UNIT	1053 GREAT WESTERN ROAD	GLASGOW	G12 0YN
GEA Farm Technologies Ltd	Wylve Works	Watery Lane	Warminster	BA12 9HT
GenPlus Ltd	2 RELAY ROAD	BRAMBLES BUSINESS PARK	WATERLOOVILLE	PO7 7XA
GLAXOSMITHKLINE RESEARCH & DEVELOPMENT	PARK ROAD		WARE	SG12 0DP
GOWRIE LAXMICO LIMITED	UNIT 4	BRADFIELD ROAD	RUISLIP	HA4 0NU
GREAT ORMOND STREET HOSPITAL FOR CHILDREN NHS FOUNDATION TRUST	CELLULAR THERAPIES	GREAT ORMOND STREET	LONDON	WC1N 3JH
HEALTH PROTECTION AGENCY	MANOR FARM ROAD	PORTON DOWN	SALISBURY	SP4 0JG
HELIOS HOMEOPATHY LIMITED	89-97 CAMDEN ROAD		TUNBRIDGE WELLS	TN1 2QR

Site Name	Address 1	Address 2	City	Postcode
Heriot-Watt University	School of Life Sciences	John Muir Building	Edinburgh	EH14 4AS
HOLLAND & BARRETT INTERNATIONAL LIMITED	SIXTH AVENUE, 100 CENTRUM, VITALITY HOUSE		BURTON UPON TRENT	DE14 2WP
HOSPIRA UK LIMITED	QUEENSWAY		LEAMINGTON SPA	CV31 3RW
HYDRACHEM LIMITED	UNITS 3,4,6,8 AND 11 GILLMANS INDUSTRIAL ESTATE	NATTS LANE	BILLINGSHURST	RH14 9EZ
Hydrokem Aerosols Limited	Hickmans Road	Birkenhead	Wirral	CH41 1JH
HYPERDRUG pharmaceuticals LIMITED	STATION INDUSTRIAL ESTATE	MIDDLETON IN TEESDALE	BARNARD CASTLE	DL12 0NG
IBA MOLECULAR UK LIMITED	NOBEL WAY	DINNINGTON	SHEFFIELD	S25 3QB
ICNE Ltd	Animal House	Boundary Road	Lytham St Annes	FY8 5LT
IDIS LIMITED	IDIS HOUSE	CHURCHFIELD ROAD	WEYBRIDGE	KT13 8DB
INDIVIOR UK LIMITED	THE CHAPLEO BUILDING, PRIORY PARK	HENRY BOOT WAY	HULL	HU4 7DY
Interpet Limited	Interpet House	Vincent Lane	Dorking	RH4 3YX
INTERPORT LIMITED	BRANDON HOUSE	MARLOWE WAY	CROYDON	CR0 4XS
Intervet UK (MSD)	36 Toseland Road	Graveley	St Neots	PE19 6PS
Intervet UK Ltd/MSDAH	Walton Manor	Walton	Buckinghamshire	MK7 7AJ
J L BRAGG (IPSWICH) LIMITED	UNITS 33, 34 & 35, BOSS HALL ROAD		IPSWICH	IP1 5BN
JOHN ARBUTHNOTT	STRATHCLYDE INSTITUTE OF pharmaceuticalCY AND BIOMEDICAL SCIENCES	UNIVERSITY OF STRATHCLYDE, 27 TAYLOR STREET	GLASGOW	G4 0NR
Johnson's Veterinary Products	5, Reddicap Trading Estate		SUTTON COLDFIELD	B75 7DF
Jubilee pharmaceuticalcy t/a Meditech	2 Upper Russell Street		Wednesbury	WS10 7AR
KENT pharmaceuticals LIMITED	WOTTON ROAD		ASHFORD	TN23 6LL
KEY pharmaceuticals LIMITED	GALEN HOUSE	83 HIGH STREET	SOMERSHAM	PE28 3JB
KILCO (INTERNATIONAL) LIMITED	BROOMHOUSES 2 INDUSTRIAL ESTATE	OLD GLASGOW ROAD	LOCKERBIE	DG11 2SD
Kilco (International) Ltd	1A Trench Road	Newtonabbey	Mallusk	BT36 4TY
KIMAL MANUFACTURING DIVISION	UNIT 62, SHERWOOD ROAD	ASTON FIELDS INDUSTRIAL ESTATE	BROMSGROVE	B60 3DR
KL pharmaceutical LIMITED	21 MACADAM PLACE	SOUTH NEWMOOR	IRVINE	KA11 4HP

Site Name	Address 1	Address 2	City	Postcode
Kusuri Products Ltd	Danefield Business Park	Heathfield Industrial Estate	NEWTON ABBOT	TQ12 6TL
L E WEST LIMITED	THE I O CENTRE	59-71 RIVER ROAD	BARKING	IG11 0DR
LALEHAM HEALTH AND BEAUTY LIMITED	CENTRAL 37	KINGSCLERE ROAD	BASINGSTOKE	RG21 5UQ
LANCASHIRE TEACHING HOSPITALS NHS FOUNDATION TRUST	ROYAL PRESTON HOSPITAL	SHAROE GREEN LANE, FULWOOD	PRESTON	PR2 9HT
LIFEPLAN PRODUCTS LIMITED	ELIZABETHAN WAY		LUTTERWORTH	LE17 4ND
LONZA BIOLOGICS PLC	228 BATH ROAD		SLOUGH	SL1 4DX
M & A pharmaceuticalCHEM LIMITED	ALLENBY LABORATORIES, WIGAN ROAD	WESTHOUGHTON	BOLTON	BL5 2AL
MACARTHYS LABORATORIES LIMITED T/A MARTINDALE pharmaceutical	BAMPTON ROAD	HAROLD HILL	ROMFORD	RM3 8UG
MANX HEALTHCARE LIMITED	TAYLOR GROUP HOUSE	WEDGNOCK LANE	WARWICK	CV34 5YA
MARFLEET ANALYTICAL SERVICES LIMITED	WYKE HOUSE	WYKE WORKS	HULL	HU9 5NL
MARTINDALE pharmaceuticals	BAMPTON ROAD	HAROLD HILL	ROMFORD	RM3 8UG
MAWDSLEYS SPECIAL SERVICES UNIT	UNIT 4, CROMPTON ROAD BUSINESS PARK	WHEATLEY HALL ROAD	DONCASTER	DN2 4PW
MAXEARN LIMITED	UNIT 29 OAKHILL TRADING ESTATE	DEVONSHIRE ROAD, WORSLEY	MANCHESTER	M28 3PT
MEDICINES EVALUATION UNIT LIMITED	THE LANGLEY BUILDING, SOUTHMOOR ROAD	WYTHENSHAW	MANCHESTER	M23 9QZ
MERCK SHARP & DOHME LIMITED	HERTFORD ROAD		HODDESDON	EN11 9BU
MOVIANTO UK LIMITED	1A PROGRESS PARK	ELSTOW	BEDFORD	MK42 9XE
MPT pharmaceutical LIMITED	UNIT 43, EMPIRE CLOSE	EMPIRE INDUSTRIAL PARK, ALDRIDGE	WALSALL	WS9 8UQ
MUNDIpharmaceutical RESEARCH LIMITED	UNIT 137	CAMBRIDGE SCIENCE PARK, MILTON ROAD	CAMBRIDGE	CB4 0GW
MUNRO WHOLESALE MEDICAL SUPPLIES LIMITED	3, 3A YOUNG PLACE	KELVIN INDUSTRIAL ESTATE, EAST KILBRIDE	GLASGOW	G75 0TD
Munro Wholesale Medical Supplies Limited	10 STROUD ROAD	KELVIN INDUSTRIAL ESTATE, EAST KILBRIDE	GLASGOW	G75 0YA
MW ENCAP LIMITED	BUILDING 1, UNITS 2-8, OAKBANK PARK WAY	OAKBANK INDUSTRIAL ESTATE, MID CALDER	LIVINGSTON	EH53 0TH

Site Name	Address 1	Address 2	City	Postcode
Mycoplasma Experience Ltd	Solario Building	Brewer Street Dairy Business Park	Bletchingley	RH1 4QP
MYLAN UK HEALTHCARE LIMITED	BUILDING 20, STATION CLOSE		POTTERS BAR	EN6 1TL
Naqua Limited	Laboratory E12, Ground Floor	East Block, Building 500	SANDWICH	CT13 9ND
Naqua Limited	Unit 8 Starborough Farm	Starborough Road	Kent	TN8 5RB
NationWide Laboratory Services (Leeds)	Millcroft	Gate Way Drive	Leeds	LS19 7XY
NEMAURA pharmaceutical LIMITED	ADVANCED TECHNOLOGY AND INNOVATION CENTRE	LOUGHBOROUGH UNIVERSITY SCIENCE AND ENTERPRISE PARK, 5 OAKWOOD DRIVE	LOUGHBOROUGH	LE11 3QF
NEOLAB LIMITED	57 HIGH STREET		ODIHAM	RG29 1LF
NICOVENTURES TRADING LIMITED	BIOSCIENCE INCUBATOR	48 GRAFTON STREET	MANCHESTER	M13 9XX
NORBROOK LABORATORIES LIMITED	STATION WORKS	CAMLOUGH ROAD	NEWRY	BT35 6JP
NORBROOK LABORATORIES LIMITED	FACTORY NO 4, CARNBANE INDUSTRIAL ESTATE		NEWRY	BT35 6QQ
NORBROOK LABORATORIES LIMITED (ARMAGH ROAD SITE)	105 ARMAGH ROAD		NEWRY	BT35 6PU
Northampton General Hospital	Radiotherapy Department	Luke Radiotherapy Building	Northampton	NN1 5BD
NORTON HEALTHCARE LIMITED T\A IVAX pharmaceuticals UK	ASTON LANE NORTH	WHITEHOUSE VALE INDUSTRIAL ESTATE	RUNCORN	WA7 3FA
NOUMED LIFE SCIENCES LIMITED	NOUMED HOUSE	SHOPPENHANGERS ROAD	MAIDENHEAD	SL6 2RB
NRIM LIMITED	MARLBOROUGH HOUSE	298 REGENT'S PARK ROAD, FINCHLEY	LONDON	N3 2UA
NT Laboratories	Unit B	Manor Farm	Wateringbury	ME18 5PP
NUPHARM LABORATORIES LIMITED	2 NEWTECH SQUARE	DEESIDE INDUSTRIAL PARK	DEESIDE	CH5 2NT
NUTRITION GROUP PLC	OLYMPIC HOUSE	OLYMPIC WAY	BLACKPOOL	FY4 4QE
PAION UK LIMITED	COMPASS HOUSE	VISION PARK, CHIVERS WAY	HISTON	CB24 9ZR
PATHEON UK LIMITED	151 BROOK DRIVE, MILTON PARK	MILTON	ABINGDON	OX14 4SD
PATHEON UK LIMITED	KINGFISHER DRIVE	COVINGHAM	SWINDON	SN3 5BZ

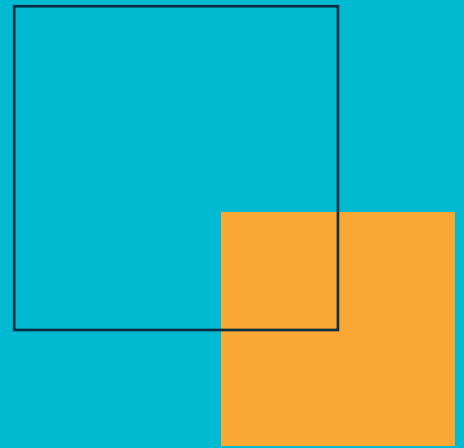
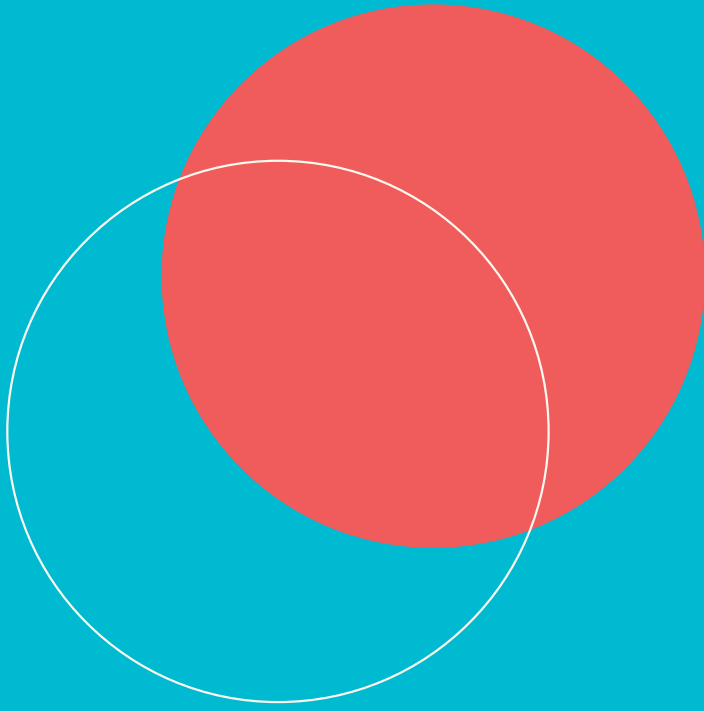
Site Name	Address 1	Address 2	City	Postcode
PECKFORTON pharmaceuticals LIMITED	THE GRANARY, THE COURTYARD BARNs	CHOKe LANE, COOKHAM DEAN	MAIDENHEAD	SL6 6PT
Petlife International Limited	Unit 2B Cavendish Road		Bury St Edmunds	IP33 3TE
PFIZER LIMITED	RAMSGATE ROAD		SANDWICH	CT13 9NJ
pharmaceuticals (UK) LIMITED	9 SPUR ROAD		ISLEWORTH	TW7 5BD
pharmaceuticalcy Business and Distribution Centre	pharmaceuticalCY BUSINESS & DISTRIBUTION CENTRE	140 HAMPSTEAD ROAD	LONDON	NW1 2BX
pharmaceuticalcy Preparative Services Unit	COLNEY LANE		NORWICH	NR4 7UY
pharmaceuticalGEN LIMITED	BRITANNIA HOUSE	CENTURIAN PARK	TAMWORTH	B77 5PZ
pharmaceuticalPAC (UK) LIMITED	UNITS 20 TO 23 AND UNITS 31 TO 34	VALLEY ROAD BUSINESS PARK	BIRKENHEAD	CH41 7EL
pharmaceuticalq Ltd	Unit 15 Sandleheath Industrial Estate		Fordingbridge	SP6 1PA
pharmaceuticalQ LTD	UNIT 15	SANDLEHEATH INDUSTRIAL ESTATE	FORDINGBRIDGE	SP6 1PA
pharmaceuticalSERVE (NORTH WEST) LIMITED	9 ARKWRIGHT ROAD	ASTMOOR INDUSTRIAL ESTATE	RUNCORN	WA7 1NU
PILSCO LIMITED	10-16 COLVILLES PLACE	EAST KILBRIDE	GLASGOW	G75 0SN
PIRAMAL HEALTHCARE UK LIMITED	WHALTON ROAD		MORPETH	NE61 3YA
POTTERS LIMITED	1 BOTANIC COURT	MARTLAND PARK	WIGAN	WN5 0JZ
PRIMEGEN LIMITED	UNIT 15, MOORCROFT	HARLINGTON ROAD	UXBRIDGE	UB8 3HD
PROCTER & GAMBLE PS (UK) LIMITED	PIMBO ROAD	WEST PIMBO	SKELMERSDALE	WN8 9PE
Provimi Limited	EASTERN AVENUE		LICHFIELD	WS13 7SE
PROVITA EUROTECH LIMITED	21 BANKMORE ROAD		OMAGH	BT79 0EU
QUALASEPT LIMITED	3 CORSHAM SCIENCE PARK	PARK LANE	CORSHAM	SN13 9FU
QUALASEPT LIMITED (ASU CORSHAM)	UNIT 15A, FIVEWAYS INDUSTRIAL ESTATE	WEST WELLS ROAD	CORSHAM	SN13 9RG
QUANTUM pharmaceutical LIMITED	HEAD OFFICE, QUANTUM HOUSE	HOBSON INDUSTRIAL ESTATE, HOBSON	NEWCASTLE UPON TYNE	NE16 6EA
QUAY pharmaceuticals LIMITED	3-4 APEX COURT	BASSENDALe ROAD	WIRRAL	CH62 3RE
QUEST VITAMINS LIMITED	GOOSEs FOOT INDUSTRIAL ESTATE	KINGSTONE	HEREFORD	HR2 9HY
QUOTIENT CLINICAL LIMITED	ORIGO CENTRE	RESEARCH AVENUE NORTH, RICcartON	EDINBURGH	EH14 4AP

Site Name	Address 1	Address 2	City	Postcode
RECIPHARM LIMITED	VALE OF BARDSLEY		ASHTON-UNDER-LYNE	OL7 9RR
RELONCHEM LIMITED	UNIT G4, RIVERSIDE INDUSTRIAL ESTATE	RIVERSIDE WAY	DARTFORD	DA1 5BS
RENACLINICAL LIMITED	UNIT 11, GATWICK METRO CENTRE	BALCOMBE ROAD	HORLEY	RH6 9GA
RICHMOND pharmaceuticalCOLOGY LIMITED	ST GEORGE'S HOSPITAL MEDICAL SCHOOL	CRANMER TERRACE, TOOTING	LONDON	SW17 0RE
River Manufacturing Limited	61 - 63 Windmill Road		Sunbury on Thames	TW16 7DT
Robinson Healthcare Limited	Lawn Road	Carlton-in-Lindrick	Worksop	S81 9LB
ROSEMONT pharmaceuticals LIMITED	ROSEMONT HOUSE	YORKDALE INDUSTRIAL PARK, BRAITHWAITE STREET	LEEDS	LS11 9XE
Rumbol Products Limited	Clydegrove Works	Hamilton Street	Clydebank	G81 1LY
Safapac Limited	4 Stapledon Road	Orton Southgate	Peterborough	PE2 6TB
SAMSUNG BIOEPIS UK LIMITED	5TH FLOOR, PROFILE WEST	950 GREAT WEST ROAD	BRENTFORD	TW8 9ES
Sandoz Ltd	WOOLMER WAY		BORDON	GU35 9QE
Schering Plough Ltd (t/a MSD AH)	Shire House	Churn Road	Berkshire	RG20 7NN
SCM pharmaceutical LIMITED	UNIT 6, REGENTS DRIVE	LOW PRUDHOE INDUSTRIAL ESTATE	PRUDHOE	NE42 6PX
SCOTTISH CENTRE FOR REGENERATIVE MEDICINE	GMP CELLULAR THERAPY FACILITY, SCOTTISH CENTRE FOR REGENERATIVE MEDICINE	EDINBURGH BIOQUARTER, 5 LITTLE FRANCE DRIVE	EDINBURGH	EH16 4UU
SEQIRUS VACCINES LIMITED	GASKILL ROAD	SPEKE	LIVERPOOL	L24 9GR
SHARP CLINICAL SERVICES (UK) LIMITED	UNIT 28, HEADS OF THE VALLEY INDUSTRIAL ESTATE	RHYMNEY	TREDEGAR	NP22 5RL
Shep-Fair Products Limited	Techways Unit 1B	Wonastow Industrial Estate (West)	Monmouth	NP25 5JA
Sinclair Animal & Household Care Limited	ROPERY ROAD		GAINSBOROUGH	DN21 2QB
SMITHKLINE BEECHAM CONSUMER HEALTHCARE	NORREYS DRIVE		MAIDENHEAD	SL6 4BL
SMITHKLINE BEECHAM LTD T\A SMITHKLINE BEECHAM pharmaceuticals	CLARENDON ROAD		WORTHING	BN14 8QH
Solvay Interox Limited	Baronet Road		Warrington	WA4 6HA

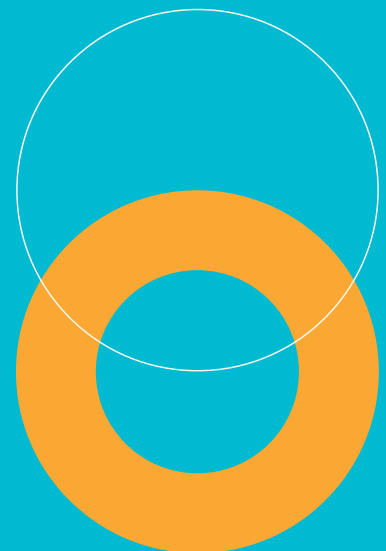


Site Name	Address 1	Address 2	City	Postcode
S-P VETERINARY LTD/SHERING-PLOUGH LTD	BREAKSPEAR ROAD SOUTH	HAREFIELD	UXBRIDGE	UB9 6LS
SPECIALITY OXYGEN SERVICE LIMITED	CONWAY INDUSTRIAL ESTATE, SKULL HOUSE LANE	APPLEY BRIDGE	WIGAN	WN6 9DW
ST GEORGE'S HEALTHCARE NHS TRUST	GROUND FLOOR, LANESBOROUGH WING	ST GEORGE'S HOSPITAL, BLACKSHAW ROAD	LONDON	SW17 0QT
Station Works	STATION WORKS	CAMLOUGH ROAD	NEWRY	BT35 6JP
STERLING pharmaceutical SOLUTIONS LIMITED	STERLING PLACE	DUDLEY	CRAMLINGTON	NE23 7QG
STOKE MANDEVILLE HOSPITAL	MANDEVILLE ROAD		AYLESBURY	HP21 8AL
SYRI LIMITED	UNIT 4	BRADFIELD ROAD	RUISLIP	HA4 0NU
TELSOL LIMITED	23/24 COLOMENDY INDUSTRIAL ESTATE	RHYL ROAD	DENBIGH	LL16 5TA
TERUMO BCT LIMITED	OLD BELFAST ROAD	MILLBROOK	LARNE	BT40 2SH
THE PLENUM BUILDING, VICTORIA pharmaceuticals AND REGIONAL QUALITY ASSURANCE SERVICE	ROYAL GROUP OF HOSPITALS SITE	GROSVENOR ROAD	BELFAST	BT12 6BA
THERMO ELECTRON LIMITED	THERMO FISHER SCIENTIFIC, FISHER BIOSERVICES DIVISION	UNIT 1, WOODSIDE, DUNMOW ROAD, BIRCHANGER	BISHOP'S STORTFORD	CM23 5RG
TILLOMED LABORATORIES LIMITED	3 HOWARD ROAD	EATON SOCON	ST. NEOTS	PE19 8ET
TORBAY AND SOUTH DEVON NHS FOUNDATION TRUST	TORBAY pharmaceutical-CEUTICALS	WILKINS DRIVE	PAIGNTON	TQ4 7FG
TORBAY AND SOUTH DEVON NHS FOUNDATION TRUST	pharmaceutical MANUFACTURING UNIT	KEMMINGS CLOSE	PAIGNTON	TQ4 7TW
TORRENT pharmaceutical (UK) LIMITED	UNIT 4, CHARLWOOD COURT	MERLIN CENTRE, COUNTY OAK WAY	CRAWLEY	RH11 7XA
UNIVERSITY OF BIRMINGHAM	CELL THERAPY FACILITY, ADVANCED THERAPIES FACILITY	WOLFSON DRIVE, EDGBASTON	BIRMINGHAM	B15 2TT
UNIVERSITY OF NOTTINGHAM	BOOTS SCIENCE BUILDING	SCHOOL OF pharmaceuticalCY, UNIVERSITY PARK	NOTTINGHAM	NG7 2RD
UNIVIT LIMITED	57A ANNETER ROAD		COOKSTOWN	BT80 0HZ
UPPERTON LIMITED	ALBERT EINSTEIN CENTRE	NOTTINGHAM SCIENCE AND TECHNOLOGY PARK	NOTTINGHAM	NG7 2TN

Site Name	Address 1	Address 2	City	Postcode
Vericore Ltd	KINNOULL ROAD	DUNSINANE INDUSTRIAL ESTATE, KINGSWAY WEST	DUNDEE	DD2 3XR
VERTICAL pharmaceutical RESOURCES LIMITED	41 CENTRAL AVENUE		WEST MOLESEY	KT8 2QZ
Vetapharmaceutical Limited	Sherburn Enterprise Park	Aviation Way	Leeds	LS25 6NB
Vetark Products Limited t/a Vetark Professional	Units 2 & 3 Barfield Close		Winchester	S023 9SQ
Veterinary Immunogenics Limited	Carleton Hill		Penrith	CA11 8TZ
VetPlus Limited	Animal House	Boundary Road	Lytham St Annes	FY8 5LT
Waterlife Research Industries Limited	476 Bath Road		Longford	UB7 0ED
WOLFSON BRAIN IMAGING CENTRE DEPARTMENT OF CLINICAL NEUROSCIENCES	BOX 65, ADDENBROOKE'S HOSPITAL	HILLS ROAD	CAMBRIDGE	CB2 2QQ
ZOOBIOTIC LIMITED (BRECON RESERVE FLY COLONY)	BATTLE HOUSE	BATTLE	BRECON	LD3 9RW



# Additional Market Information



# Partnerships, Mergers and Acquisitions

Recent examples for pharmaceutical manufacturers forming partnerships with healthcare professionals for R&D purposes were:

- Johnson & Johnson setting up a joint research project with Oxford University examining mental health disorders
- Novo Nordisk funding a new diabetes research centre in Oxford University

The two major UK mergers in 2018 were:

- Bristol Myers Squibb & Colgene (\$74bn)
- Takeda & Shire (\$62bn)

The main reasons for the mergers were to:

- 'Buy innovation' and avoid the cost of drug development
- Gain market access

Other M&A activities in 2018 include:

- GSK buying out Novartis stake in consumer health joint venture and Novartis subsequently Novartis moving away from high volume towards low volume, specialist drugs
- GSK merging its consumer business with Pfizer
- GSK buying TESARO in the US (NB: TESARO specialise in oncology drugs)
- AstraZeneca selling respiratory drugs to Covis pharmaceutical
- Catalent acquiring Juniper pharmaceutical Services to strengthen drug development
- Sanofi buying Biovertiv Inc
- Recipharm acquiring Sanofi Holmes Chapel site
- Advanced Medical Solutions Group acquiring Sealantis
- Smith & Nephew acquiring Ceretix Orthopaedics
- Dechra pharmaceuticals acquiring AST Farma and Le Vet
- To access the UK, Canadian Wayland Group buying Theros pharmaceutical, based in Newcastle

# Health Expenditure

## Price structure of retail medicine across Europe (2015)

— Manufacturer:	66.0%
— Wholesaler:	4.8%
— pharmaceuticalcist:	19.2%
— State (VAT/taxes):	10.0%

## VAT on medicine in the UK:

— Standard:	20%
— Prescription:	0%
— OTC:	20%

## Share of Generics (2015)

— UK	31%
— Italy	54%
— Spain	22%
— Germany	31%
— Ireland	21%
— France	19%

# Drugs & Medicine Exports by Country

Below are the 15 countries that exported the highest dollar value worth of drugs and medicines during 2018.

1. Germany: US\$623 billion (16.8% of total drugs and medicines exports)
2. Switzerland: \$45.3 billion (12.2%)
3. Belgium: \$27.8 billion (7.5%)
4. France: \$25.9 billion (7%)
5. United States: 322 billion (5.9%)
6. Ireland: \$21.7 billion (5.8%)
7. United Kingdom: \$19.7 billion (53%)
8. Italy: \$19.6 billion (5.3%)
9. Netherlands: \$16.8 billion (4.5%)
10. India: \$13.1 billion (3.5%)
11. Denmark: \$13 billion (3.5%)
12. Spain: 39 billion (2.4%)
13. Canada: \$6.8 billion (1.8%)
14. Sweden: \$6.7 billion (1.8%)
15. Austria: 355 billion (1.5%)

By value, the listed 15 countries shipped 85% of all exported drugs and medicine for 2018.

Among the above countries, the fastest-growing exporters of drugs and medicines since 2014 were: Denmark (up 293.4%), Switzerland (up 26.7%), India (up 22.5%) and Germany (up 20%).

Those countries that posted declines in their exported drugs and medicines sales were led by United Kingdom (down -18.1%), United States (down -14.31%), Italy (down -124%), Belgium (down -9.6%) and Austria (down -8.3%).

## Source:

The World Factbook, Field Listing: Exports – Commodities, Central Intelligence Agency. Accessed on May 11, 2019

## Contact

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