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FROM THE AMERICAN PEOPLE

# Engaging Manufacturers in a Changing Contraceptive Market: Who are the “new” players and what do they want?

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**Abt**

Abt Associates Inc. in partnership with:  
Banyan Global  
Dillon Allman and Partners, LLC  
Family Health International  
Forum One Communications  
IntraHealth International  
O'Hanlon Consulting  
Population Services International  
Tulane University School of Public Health and Tropical Medicine



# Industry Changes Since 2004

- Bayer acquisition of Schering AG (March 2006)
- Schering Plough acquisition of Organon (March 2007)
- Wyeth discontinues institutional brands (March 2008)
- Pfizer acquisition of Wyeth (January 2009)
- Teva acquisition of Barr and Duramed (January 2009)
- Emergence of generic suppliers in Asia and Africa

# Key Partners for Private Sector Programs

Company	Products
Bayer Schering	OCs, injectables, hormonal IUS, Jadelle
Schering Plough	OCs, Nuva Ring, Implanon
Pfizer, Inc.	Depo Provera
Gedeon Richter	OCs, EC
FamyCare	OCs, IUDs

# Types of Contraceptive Products

Generic



Branded  
generic



Originator  
Brand

# Trends in Mature Markets

- Largest markets in North America, W. Europe
- R&D mergers and acquisitions
- Growth of generic powerhouses
- Intense litigation (patents, liability)
- New OC formulations, new indications
- Brand promotion increasingly focused on consumers



Birth control every day?  
Not now, no way.

# Let Freedom Ring

**Freedom Ringing**  
The Freedom Ring is a new, revolutionary birth control device that allows you to choose when you want to have sex. It's a small, flexible ring that you wear around your finger. It contains a hormone that prevents pregnancy. You can remove it at any time, and you can use it for up to 3 months. It's a convenient, effective way to control your fertility.

**NEVIRING**  
The Freedom Ring is a new, revolutionary birth control device that allows you to choose when you want to have sex. It's a small, flexible ring that you wear around your finger. It contains a hormone that prevents pregnancy. You can remove it at any time, and you can use it for up to 3 months. It's a convenient, effective way to control your fertility.

What if you could choose which months to have your period?

JUNE SEPTEMBER  
DECEMBER  
MARCH

**With Seasonale you have just 4 periods. And you decide in which months to have them.**

Of course, Seasonale is 99% effective, the same as your current pill. But with fewer periods, you'll have a lot more choices of what you want to do throughout the year. Ask your healthcare practitioner for a switch to Seasonale. Don't wait another month to experience fewer periods. And enjoy a lot more things you'd really love to choose.

**seasonale**  
levonorgestrel/ethinyl estradiol 0.02mg/0.04mg  
FEWER PERIODS. MORE POSSIBILITIES.

With my new birth control,  
Now the only cycle I think about  
is the kind with wheels

**INTRODUCING LYBREL.**  
Once my doctor told me medically I don't need my monthly cycle, everything changed.

There's a whole new way to look at your birth control... and your cycle. Thanks to one Lybrel, it's the only FDA-approved, low-dose I/P designed to put your monthly cycle on hold by reducing hormonal fluctuations every day of the year.

As a combination of 4 months, you can skip. Pulling your cycle on hold with Lybrel is medically acceptable, safe, and effective. Haven't had a cycle? You take an "active pill" (AP) each a year. For the first few months, some women may have spotting or breakthrough bleeding, but after six months, seven out of 10 women were completely without any kind of visible production.

And one study showed Lybrel helped reduce missing to almost 50 percent. If you want to get pregnant, just stop taking Lybrel. Conception will return to normal within a month or two. To find out more, visit [www.lybrel.com](http://www.lybrel.com) and ask your healthcare professional about Lybrel.

You'll want to weigh the incidence of breakthrough bleeding against the benefits of Lybrel. Because regular withdrawal bleeding does not occur with use of Lybrel, unintended pregnancy may be difficult to recognize. If, for any reason, you suspect pregnancy, a pregnancy test should be performed. The most common side effects with Lybrel were not serious and similar to those experienced with other birth control pills containing low doses of hormones. Some women did gain a small amount of weight (less than two pounds) over the course of one year. As with other birth control pills, serious risks, which can be life-threatening, include blood clots, stroke and heart attack. Lybrel, including increased blood clots, especially if you are over 35. Some women should not use the I/P, including women who have blood clots, certain cancers, a history of heart attack or stroke, do not use if you are or may be pregnant. The I/P does not protect against HIV and other sexually transmitted diseases (STDs).

**Lybrel**  
levonorgestrel and ethinyl estradiol tablets

# Trends in Emerging Markets



- Include Russia, E. Europe, middle income Asia and South America
- Fast growing markets, follow trends from developed markets
- Substantial investment in brand-building by R&D companies
- Limited penetration of generic industry in commercial markets

# Trends in Developing Markets

- Include low-income countries in Africa, South Asia, Latin America
- Dominance of free/subsidized products
- Promotion of FP is domain of social marketing and BCC
- Limited investment by manufacturers
- Innovation driven by economics, public health goals



**SECURIL®**  
pour le *bien-être*  
de ma famille!

• **Un moyen sûr d'espacer les naissances**  
• **Pour la bonne santé de la mère et de l'enfant**

**Composition** 1<sup>re</sup> DULOLEM et FUMARATE FERREUX  
21 Comprimés blancs : norgestrel 0,3 mg - Ethinylodiolol 0,03mg  
excipient q.s.q. un comprimé  
7 Comprimés bruns : ferrocyanure de fer 75 mg - excipient q.s.q. un comprimé

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# Opportunities for Partnerships

- R&D companies have resources to invest in overall market growth but must defend brands
- Generic manufacturers looking for new markets, offer low prices but have limited marketing capability or distribution networks
- Cost structure and investment patterns are very different for these two types of manufacturers

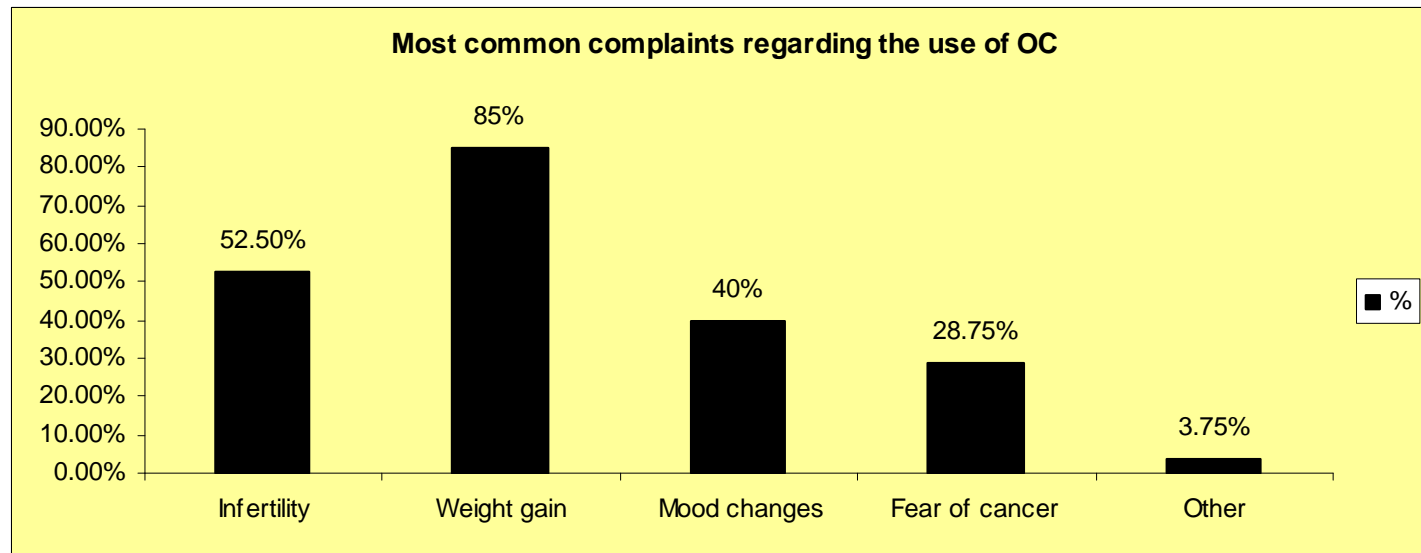
# Partnering with BSP in Jordan

- Key challenges:
  - Fertility and CPR below targeted levels
  - Traditional methods on the increase
  - Bias against hormonal contraception among doctors
  - Misinformation about OCs among patients
  - 47% first-year discontinuation rate for OCs



# Partnering with BSP in Jordan

- Objectives:
  - Reduce provider bias about hormonal contraception
  - Improve doctors' ability to address patient concerns



Source: PSP  
Doctors' Family  
Planning And  
Breast Cancer  
Survey 2008

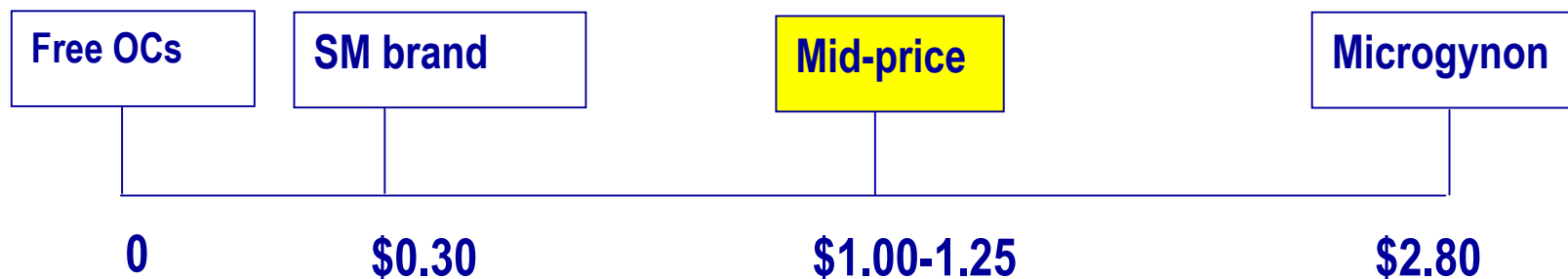
# Partnering with BSP in Jordan



- Provider roundtables using EBM, focusing on critical issues
- BSP and PSP/Jordan cost-sharing 20 roundtables in 2009-2010
- PSP-*One* trained speakers and medical reps. from BSP and PSP/Jordan project

# Partnering with FamyCare in Nigeria

- Challenge: Introduce an affordable commercial OC brand on highly subsidized Nigeria market
- Strategy:
  - Broker partnership between a low cost manufacturer and a local SM organization
  - Provide time-defined donor support for new brand then graduate the program



# Partnership Model

**PSP-One**

Brokering, project design and  
market-building support

**Famy Care Ltd.**

Manufacturing  
& branding

*Products*



**Society for  
Family Health**

Marketing & distribution



**PSI**

Funding for first order and  
technical support



# Results

- 5 year distribution contract between FamyCare and SFH
- MoU and cost-sharing between FamyCare, SFH, PSI and USAID
- First affordable commercial OC launched in January 2009
- New formulation in previously undifferentiated OC market



Levonorgestrel 0.1mg + ethinylestradiol 20mcg

\$1.20 per cycle

# Lesson Learned

- Both R&D and generic manufacturers make great partners for private sector FP programs
- Generic manufacturers are willing to market their own commercial brands and want to partner
- R&D companies with vested presence in developing countries want to grow those markets
- Segmented strategies are necessary to attract manufacturer support in a particular market
- Tomorrow's challenge: to create viable markets for commercial brands in developing countries



# Market Building Starts with Consumers



Un enfant a besoin qu'on lui donne beaucoup d'amour mais aussi qu'on lui consacre beaucoup de temps. Grâce à **Novelle Duo**, un contraceptif fiable et efficace, vous pouvez espacer les naissances en fonction de vos souhaits et de votre situation familiale ou professionnelle.

