

Navigating Information Blind Spots Through Market Intelligence to Create an Informed Contraceptives Market

Technical Brief

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About this Brief

The contraceptives market in India suffers from vital information blind spots in critical nodes of the supply chain, from production to use. This market failure constrains both the supply and demand for contraceptives, contributing to market dysfunction and low performance. This brief identifies the information and market intelligence gaps across the contraceptives value chain and presents plausible solutions for addressing these to improve contraceptives market systems performance in line with the market development approach (MDA). The USAID Frontier Health Markets (FHM) Engage activity in India aims to bridge these information gaps through a host of targeted interventions for market actors across the value chain. Women's Health and Livelihood Alliance (WOHLA) will help create a well-informed contraceptives market by working with market actors to address their respective information needs, regarding knowledge of newer contraceptives; product introduction, promotion, and marketing guidelines; affordable financing options; and market demand estimates.

Information Gaps Across the Supply Chain Contribute to Market Dysfunction

In India, the private sector contraceptives market is an information-poor environment. Market actors' capacity to perform their core supply and demand functions across the value chain is hampered by absent or inadequate information and market intelligence. Market data across the supply chain is limited due to lack of effective stewardship to collect, analyze, and use data across public and private contraceptive markets. At the starting point of the supply chain, this means that manufacturers are unable to forecast demand accurately, size market potential, and make informed business plans. This reduces interest in investing in market growth, as they lack trusted information and are forced to make educated guesses or depend on NGOs or social marketing organizations (SMOs) for fragmented information. At the other end of the value chain, consumers, often young women aged 19 to 29, are not provided reliable and adequate information to choose fit-for-purpose contraceptive products and services that match their needs and aspirations. In between are the significant supplier nodes of distributors, pharmacists, and service providers, who do not receive structured, curated information that will help build the market and assist them to address user information needs.

Alliance Co-founding Partner



Users

Women's contraceptive needs vary by age and life stage, as does method of choice. While standard messages can address knowledge, women need specific and customized information and support to adopt, use, and switch between modern methods, as necessary. Lack of information about available products and services, their benefits and side effects, and user financing options often constrain the expression of choice and is a significant barrier to access. According to the Demographic Health Survey (DHS) 2019-21 data, nearly two-thirds (62.4%) of women using contraceptives are not advised of the side effects of their current contraceptive method and health workers speak to less than a quarter (23.9%) of non-users about using contraception. This lack of information or post-adoption support is a significant contributor to discontinuation of contraceptive use. Also access to information on affordable user financing options is often missing.

Service Providers

A variety of service providers offer contraceptive products and services in India, ranging from obstetricians/gynecologists (OB/GYNs); general physicians (GPs) (through hospitals and private GP clinics), to alternative medicine practitioners, collectively called AYUSH¹. Most providers often get their information on newer contraceptives from manufacturer-appointed medical representatives (MRs), trainings conducted by industry associations such as Federation of Obstetric and Gynecological Societies of India (FOGSI), and some international non-profit organizations (INGOs) like Marie Stopes International. The access to information is not democratic and equitable as specialist providers such as OB/GYNs are often better informed than others, especially about the newer innovative contraceptive methods such as higher generation oral contraceptives and implants. AYUSH practitioners and registered medical practitioners (RMP) especially do not have access to information, infrastructure, and standard guidance towards providing balanced family planning services.

Pharmacists

Neighborhood pharmacists are often trusted sources of information for the community and often the first point of contact for consumers, especially urban youth. However, they are not always well-informed about the properties (co-benefits and better side effect profiles) of newer contraceptive methods, which may prevent them from stocking these or counselling young women about these options. Poor market intelligence about these product categories in terms of market demand, stock volumes, and product offtake may also prevent them from stocking these products.

Distributors

As the most important node in further selling and redistribution efforts, distributors often experience the risk of maintaining large inventories without adequate demand, which is often promised by the manufacturers. Further, lack of information about features and benefits about newer contraceptive methods such as higher generation oral contraceptives and implants – and their potential appeal to users – prevents distributors from investing even in small volumes and promoting these to chemists. Poor market intelligence about demand by product category and geography is another information gap that needs to be addressed for informed business planning and real-time logistics management.

¹ AYUSH or Ayurvedic, Unani, Siddha, and Homeopathy is a blanket term used to refer to practitioners of alternative medicine systems (other than modern medicine) in India.

Manufacturers

Manufacturers often lack clear government guidelines on introducing new products and marketing and promotion of existing products, which lowers their investment appetite. Furthermore, lack of reliable market intelligence on product category sales volumes and demand hinders informed business planning with a clear line of sight to returns.

FHM Engage Intends to Bridge Information Gaps and Create a Well-Informed Market

Reliable, high-quality information is essential for a well-informed market. One of the core mandates of FHM Engage in India is to democratize information access and bridge market intelligence gaps. This is embedded in our 360-degree market development approach (MDA) which facilitates market actors across the value chain, including manufacturers, distributors, retailers, service providers to deliver at capacity, as well as consumers to make informed choices. Specifically, FHM Engage will facilitate sensitization and learning sessions for market actors to align with user needs. Further, our market intelligence function collects and disseminates vital intelligence to various market actors, whether it is information nuggets on health and livelihood, which educate and empower end users in choosing the right contraceptives for their needs, or demand forecasting models by product category for project focus geographies that enable manufacturers to make informed business plans.

FHM Engage has partnered with a digital provider called Nivi to reach youth at scale for marketing and safe space engagement during adoption and post adoption support. Also, FHM Engage will work with service providers and pharmacists to build their capacity, training and educating them on administering and dispensing innovative contraceptive methods. While continued engagement with modern medicine practitioners (OB/GYNs and GPs) is critical as they are well-positioned to offer the entire basket of contraceptive services in urban areas, engaging alternative medicine (AYUSH) practitioners and RMPs will be vital to reach rural and low-income consumers, as well as those in certain project geographies (e.g., Assam and Meghalaya) where there is a high density of alternative medicine practitioners. Our public sector engagement will also include advocacy on increasing provider diversity by clarifying guidelines on which providers can offer which contraceptive products and services at which points of delivery, especially with respect to alternative medicine (AYUSH) practitioners.

FHM Engage aims to provide credible market intelligence to distributors (on product category demand by geography, for instance) for enhanced inventory/logistics management through its market intelligence function which will work on, for instance, demand forecasting and pricing by collecting and analyzing data on product uptake, price sensitivity, or consumer preference.

Similarly, FHM Engage shall engage with pharmacists to increase their knowledge of contraceptive products and services as they are often a trusted source of counseling for many consumers, especially for urban youth. Informed pharmacists can act as community evangelists for newer contraceptives if they receive adequate learning support, resulting in consumer loyalty, greater business, and higher social credibility for them.

Furthermore, FHM Engage will work with the Government of India to facilitate policymaking that creates the right incentives for manufacturers by clarifying rules and regulations to introduce new

products that might better match the needs of the young demographic and promote and market existing contraceptive methods to stimulate demand.

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Frontier Health Markets (FHM) Engage works to improve the market environment for greater private sector participation in the delivery of health products and services and to improve equal access to and uptake of high-quality consumer driven health products, services, and information. FHM Engage is implemented by four core consortium partners: Chemonics International (prime and co-technical lead), Results for Development (co-technical lead), Pathfinder International, and Zenysis Technologies, and a host of Network Implementation Partners (NIPs).

In India, FHM Engage is partnering with Samhita's Collective Good Foundation (CGF) to initiate the Women's Health and Livelihood Alliance (WOHLA) as a health marketplace to mobilize resources and improve access for young girls and women to healthcare services and products and livelihood opportunities for economic empowerment. Additional partners for this activity include Access Health International, Nivi Inc. and Pharmarack Technologies

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