



Emergency Contraceptives are Available Even When They Aren't

A review of emergency contraception information collected through a retail survey in Angola

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EC Market Data in Sub-Saharan Africa

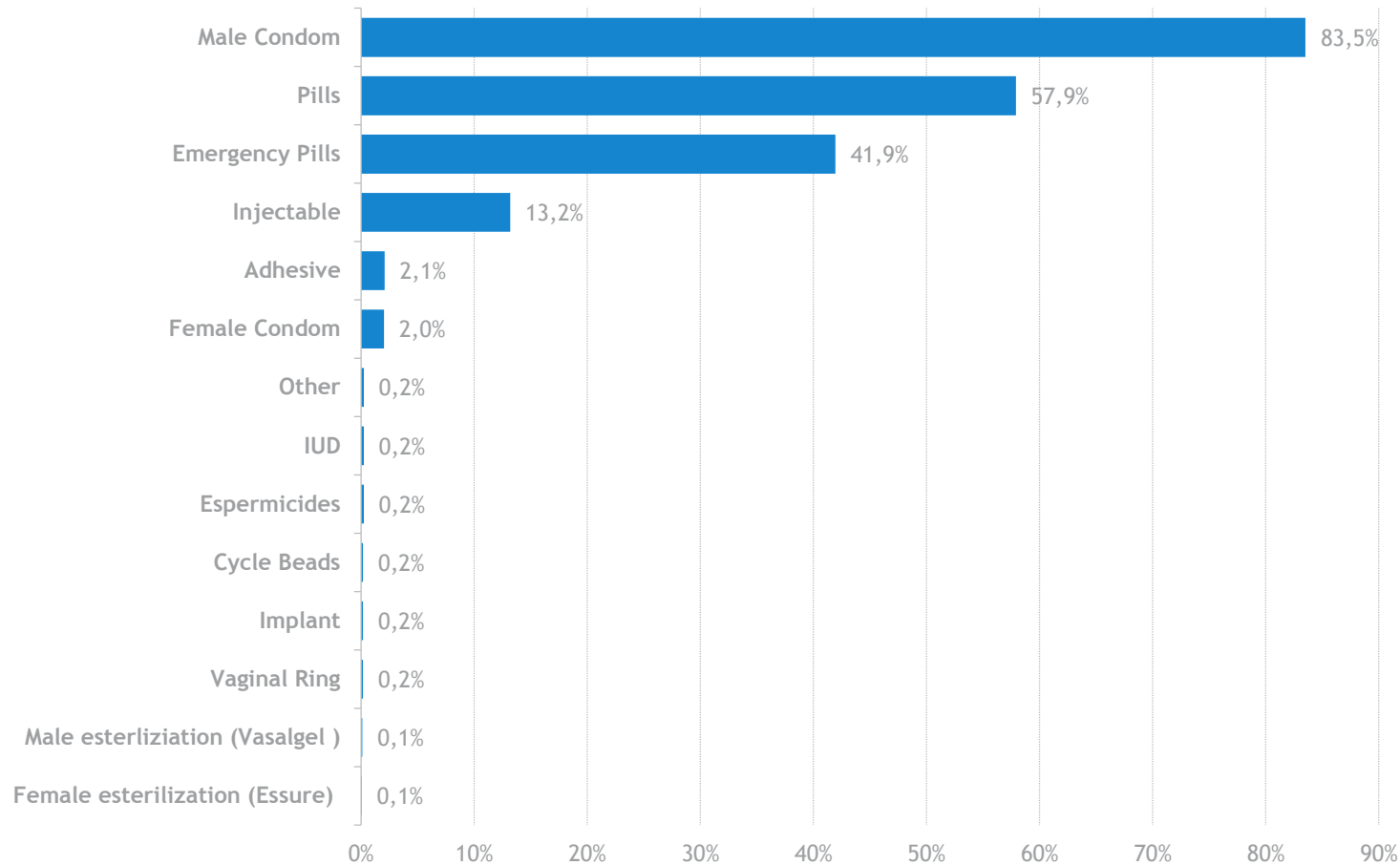
- Limited data
- IMS data in French West Africa suggest a dynamic market
- Relatively many new entrants even in countries with low per capita GDP
- Local retail audits or surveys are needed to better understand reach and coverage of drugs

PSI/SINFIC Retail Survey Methodology

- SINFIC - an Angolan IT business with offices in Mozambique, Brazil, and Portugal contracted by PSI
- Survey conducted June 25 - September 20, 2014 in Luanda Province
- Interviews with 1829 respondents reaching 2173 outlets
- 94% of outlets were pharmacies, hospitals, health centers or clinics

Percentage of Outlets Selling Contraceptives (by type), Luanda 2014

N=1,829

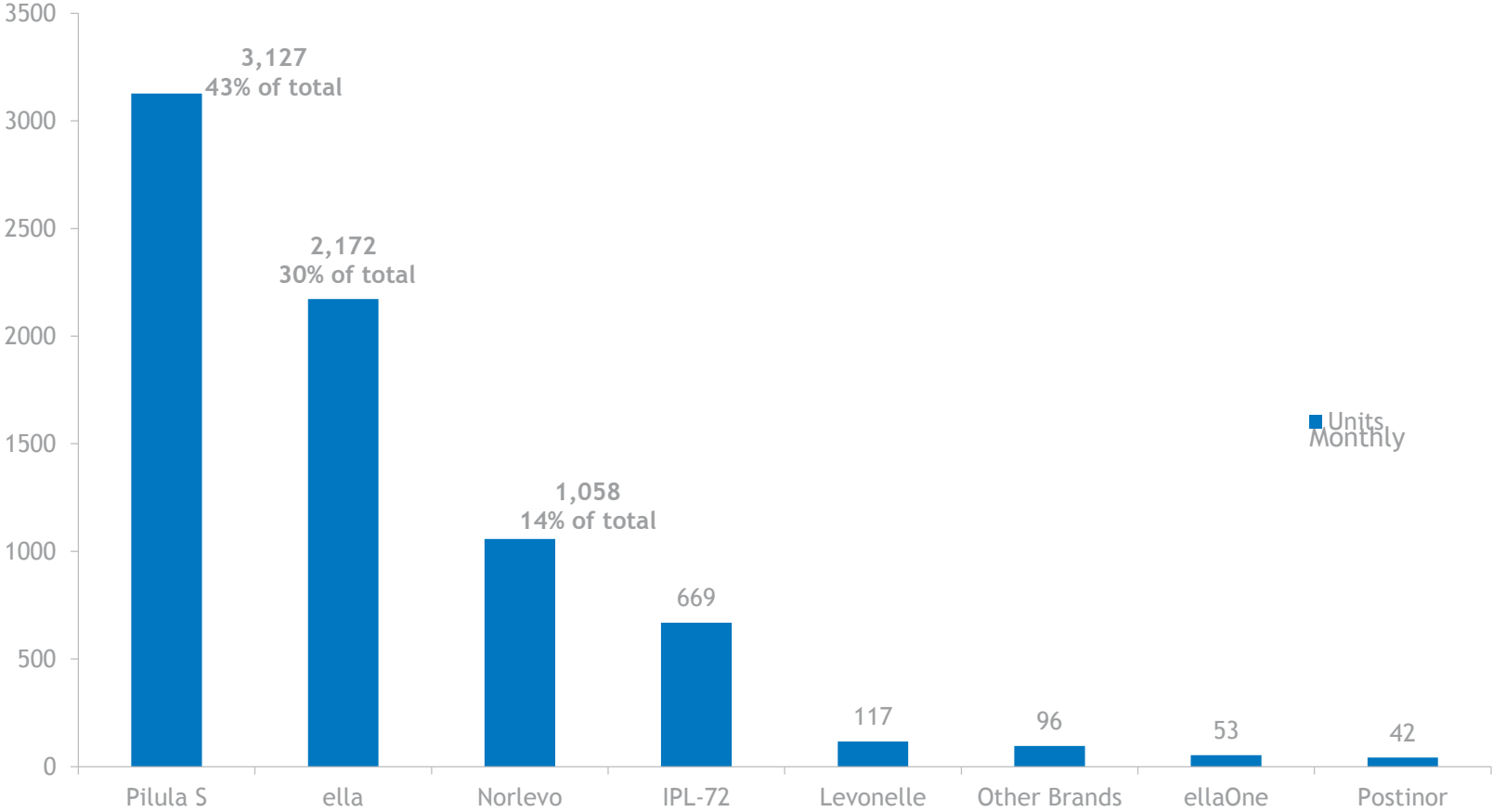


EC Availability

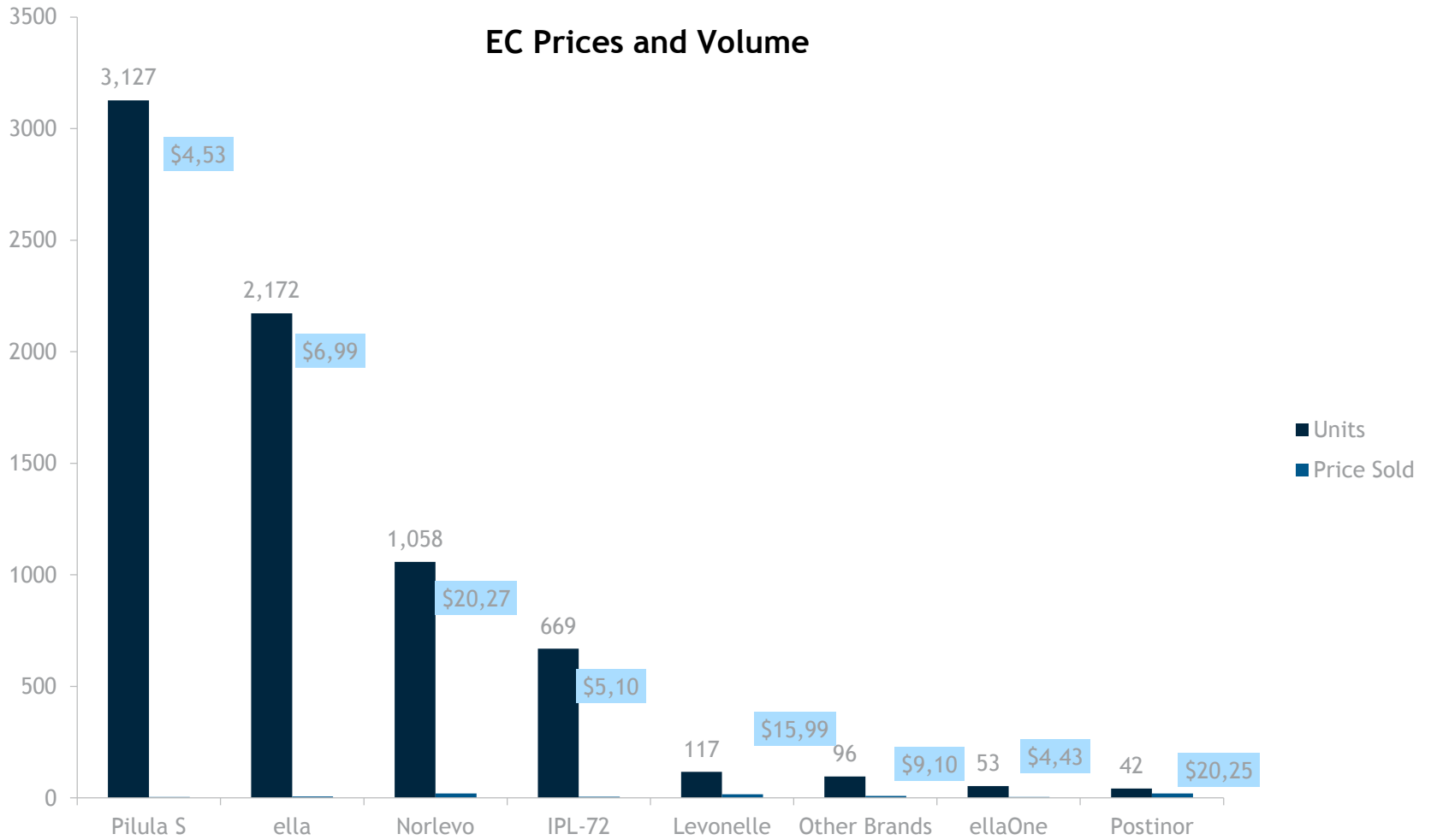
- Survey found 14 methods available including implants, patches, rings, Essure, IUDs, etc
- EC is 1 of 3 most frequently found contraceptives after condoms and pills
- 42% of all surveyed outlets sell EC (96% sell either condoms, pills or EC)
- 9 EC brands vs. 12 OC and 2 injectable brands, 4 implant and 2 IUD brands

Top Brands Include Innovator and Generic Products

87% of market dominated by Pilula S, ella, and Norlevo



EC Volume, Price and Margin



How Do Combined Oral Contraceptive (COC) Pills Compare to EC Pills?

Monthly OC units = 22,417

Average price = \$8.61

Average margin = 37.8%

Monthly EC units = 7,334

Average Price = \$10.83

Average Margin = 39.9%

EC in the Public Sector

UNFPA and GOA procure for the public sector

Source	Units	% of Total Market
12 month average of UNFPA Procurement Jan 2012 - Dec 2013	5,960	6%
Extrapolation of market monthly sales for 1 year	88,008	94%

Thoughts

Countries with relatively low mCPR rates can have a vibrant EC market

- EC is available in a large number of Luanda province pharmacies and health centers
- EC prices and margins are somewhat higher than OC prices
- Routine market data gathered by market research companies is key to determining market healthy and dynamics
- Additional research is needed to determine reach in rural areas and among different quintiles.

Percentage of outlets selling different brand pills (by type), Luanda 2014

