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

- Male Condom: 83.5%
- Pills: 57.9%
- Emergency Pills: 41.9%
- Injectable: 13.2%
- Adhesive: 2.1%
- Female Condom: 2.0%
- Other: 0.2%
- IUD: 0.2%
- Espermicides: 0.2%
- Cycle Beads: 0.2%
- Implant: 0.2%
- Vaginal Ring: 0.2%
- Male esterliziation (Vasalgel): 0.1%
- Female esterlization (Essure): 0.1%
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

- Pilula S: 3,127 units (43% of total)
- ella: 2,172 units (30% of total)
- Norlevo: 1,058 units (14% of total)
- IPL-72: 669 units
- Levonelle: 117 units
- Other Brands: 96 units
- ellaOne: 53 units
- Postinor: 42 units

Units Monthly
EC Volume, Price and Margin

EC Prices and Volume

- Pilula S: 3,127 units at $4,53 price
- ella: 2,172 units at $6,99 price
- Norlevo: 1,058 units at $20,27 price
- IPL-72: 669 units at $5,10 price
- Levonelle: 117 units at $15,99 price
- Other Brands: 96 units at $9,10 price
- ellaOne: 53 units at $4,43 price
- Postinor: 42 units at $20,25 price
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

<table>
<thead>
<tr>
<th>Source</th>
<th>Units</th>
<th>% of Total Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>12 month average of UNFPA Procurement Jan 2012 - Dec 2013</td>
<td>5,960</td>
<td>6%</td>
</tr>
<tr>
<td>Extrapolation of market monthly sales for 1 year</td>
<td>88,008</td>
<td>94%</td>
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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

n=1,109

- Microgynon: 85.7%
- Microlut: 38.2%
- Diane 35: 7.4%
- Yasmin: 5.4%
- Gynera: 2.5%
- Outra marca: 2.3%
- Marvelon: 2.2%
- Yaz: 1.7%
- Cerazette: 1.5%
- Yasminelle: 1.4%
- Minulette: 0.5%
- Cilest: 0.4%
- Tri-minulet: 0.3%
- Cipresta: 0.2%
- Trienor: 0.1%
- Nordette 28: 0.1%