

Shaping the Emergency Contraception Market in Francophone West and Central Africa - Update

January 2024



It's January of 2024, and a young woman walks into a pharmacy in Douala, Cameroon. She approaches the counter with hesitation and in a low voice she asks the pharmacist "Can I have the emergency pill?" The pharmacist says "Yes, of course, we have many different options, which one suits you?"

In 2020, DKT published a White Paper called "[Shaping the Emergency Contraception \(EC\) Market in French West Africa](#)". DKT Francophone West and Central Africa (DKT FWACA)'s goal was to increase access and affordability of Emergency Contraception by changing the market from niche to mass market. As a follow up, DKT provides this 2024 White Paper to assess DKT's impact on the market over the last four years.

Background

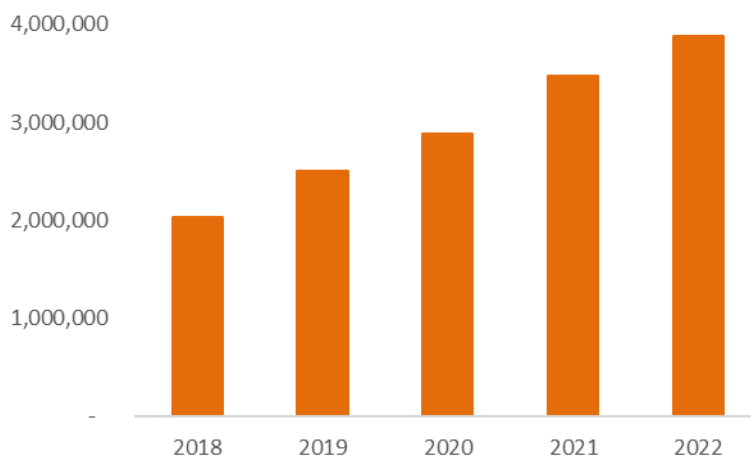
In 2016, when DKT FWACA started operations in Francophone West Africa, the EC market was dominated by high-priced products (average cost of \$6 USD) with relatively small volumes. The low volumes were primarily due to lack of awareness about the product, as well as provider reticence within a broadly conservative culture. Distributors were happy with good margins on low-volume products. DKT set out to sell high-quality, affordable EC to prove to manufacturers and distributors there was strong potential market in higher-volume, lower-cost products. Our work was supported by high-visibility, positive campaigns to end-users and raising awareness with pharmacists and healthcare providers to remove barriers to prescribing behaviors.

So, did EC move from a niche to a mass market product?

Yes – DKT evolved the EC marketplace.

Looking at sales volumes from private sector distributor data¹, between 2018 and 2022 across FWACA countries², we see a 92% increase in unit sales and an 72% increase in total commodity value (Graph 1). For example, in Benin the number of units went from 140,000 in 2018 to 374,000 in 2022. This increase far outstrips population growth in the region. EC is now used widely across the region and is stocked in most pharmacies.

Graph 1: EC units sold in the private sector in FWACA countries, 2018-2022



¹ IQVIA private sector distributor data

² Benin, Burkina Faso, Cameroon, Cote d'Ivoire, Guinea, Mali, Niger, Senegal, Togo

As volumes are increasing, is this translating to cheaper prices for end users?

Yes – prices have dropped over time.

Looking at the same data, Graph 2 sees a drop in average wholesale price, non-adjusted for inflation, of 118 CFA (0.20 USD) per pill between 2018 and 2022. This has been driven new actors with more affordable prices joining the market, attracted by higher volumes and market potential. Governments in the region regulate end-user prices by applying a fixed percentage margin to the wholesale price, so these cost savings are truly passed on to end-users.

What evidence suggests that DKT supported this shift?

Our entry into the market coincided with strong market growth, even though can't prove causation.

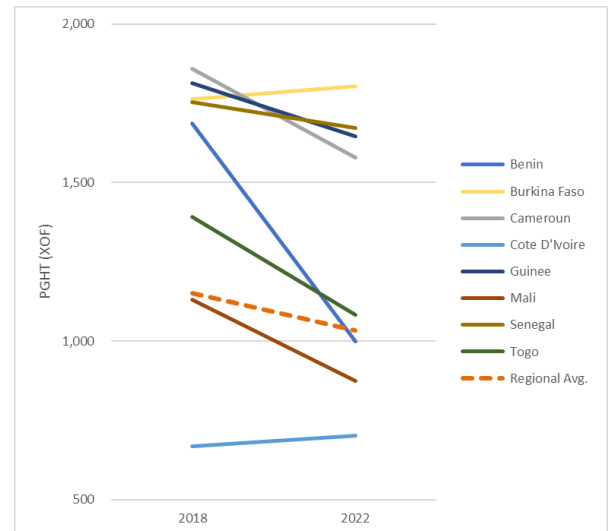
DKT positions its EC as low-cost (approximately 1,000 CFA or 1.60 USD) which makes it more accessible to most women - especially in comparison to the \$6 USD price point that was the norm before DKT's efforts. By coupling accessible products with initiatives to increase awareness by end-users and pharmacists, DKT creates increased supply and demand for the product that benefits the whole market.

Is DKT taking market share and crowding out commercial actors?

No – the overall market has grown as DKT emerges as a key market player.

It's true that DKT has gained substantial market share, but this has been accompanied by overall market growth and crowding in of other actors. DKT's strategy has been to show the market potential for low-cost brands to other suppliers. Analysis of market research company IQVIA data reveals that the number of individual, discrete EC brands in the marketplace has increased by 32% from 73 to 96 between 2018 and 2022. Other private sector actors have been attracted by the growing market and see the potential for profit. We can see this effect at a national level in the example of Mali below.

Graph 2: Average wholesaler price (CFA) per EC in FWACA countries



DKT's low-priced EC brands, Postpill and Levodia





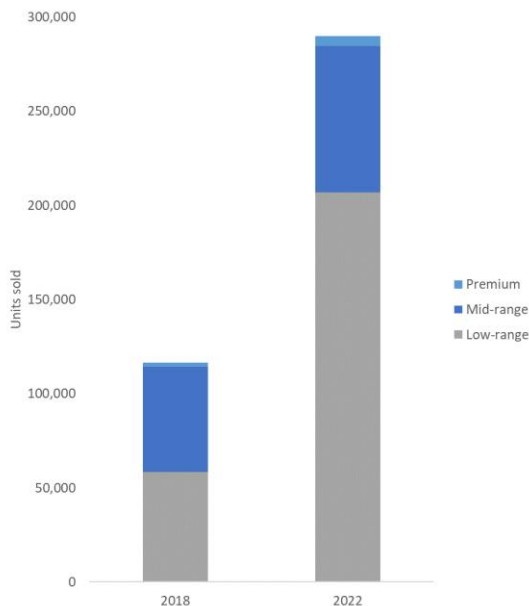
Case Study: Mali

DKT entered the Malian EC market in 2017 with a low-priced EC product and a strategy to raise awareness about EC, ensuring Malian women and men knew about it through mass media (TV, billboards, radio). Doctors, midwives and pharmacists were informed via medical detailer visits and a range of communications messages. This mass-media/ ground-work combination, plus a quality low-cost product meant that the market grew rapidly, increasing by 149% from 2018 to 2022, with DKT's sales growing to become the market leader in 2022. This success prompted other commercial actors to join in; two new products have arrived in Mali since 2018 - both in the low-range segment seen in Table 1. This development drove an increase in the market share of low-price products as seen in the Graph 3, from 50% in 2018 to 71% in 2022. As a result, many more Malian women now have access to low-cost options for EC.

Table 1: Price segments and number of brands for EC in Mali Evolution between 2018 and 2022

Price Segment	Retail price (CFA)	Retail price (USD)	# of brands - 2018	# of brands - 2022
Premium	>4000	>6.70	1	1
Mid-range	2000 - 3999	3.34 - 6.69	5	5
Low-range	<2000	<3.34	3	5

Graph 3: Evolution in EC units sold by price segment in Mali, 2018-2022



Encouragingly, the market remains healthy. Even mid-range actors that have lost market share to the low-range brands are still improving total revenue because the pie itself is growing; their revenue grew by 43% between 2018 and 2022. The premium segment has not lost any market share, and has seen its volumes and profits grow with the increased total market.

The example of Mali shows that DKT's approach is working, and that the EC category is being transformed from a niche to mass market, all while improving the health of the market. This results in more women in the region having sustainable access to this important product for years to come.

What next?

DKT FWACA has a wide portfolio of contraceptive and safe abortion products. The example of EC shows that the DKT approach works to increase availability and affordability of contraceptive products in the region. By using this effective social marketing model and DKT's regional approach, we aim to achieve the same successes for contraceptive and safe abortion products all across FWACA.

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