



# Roundtable on Generic RH Commodity Supply Among Developing Countries

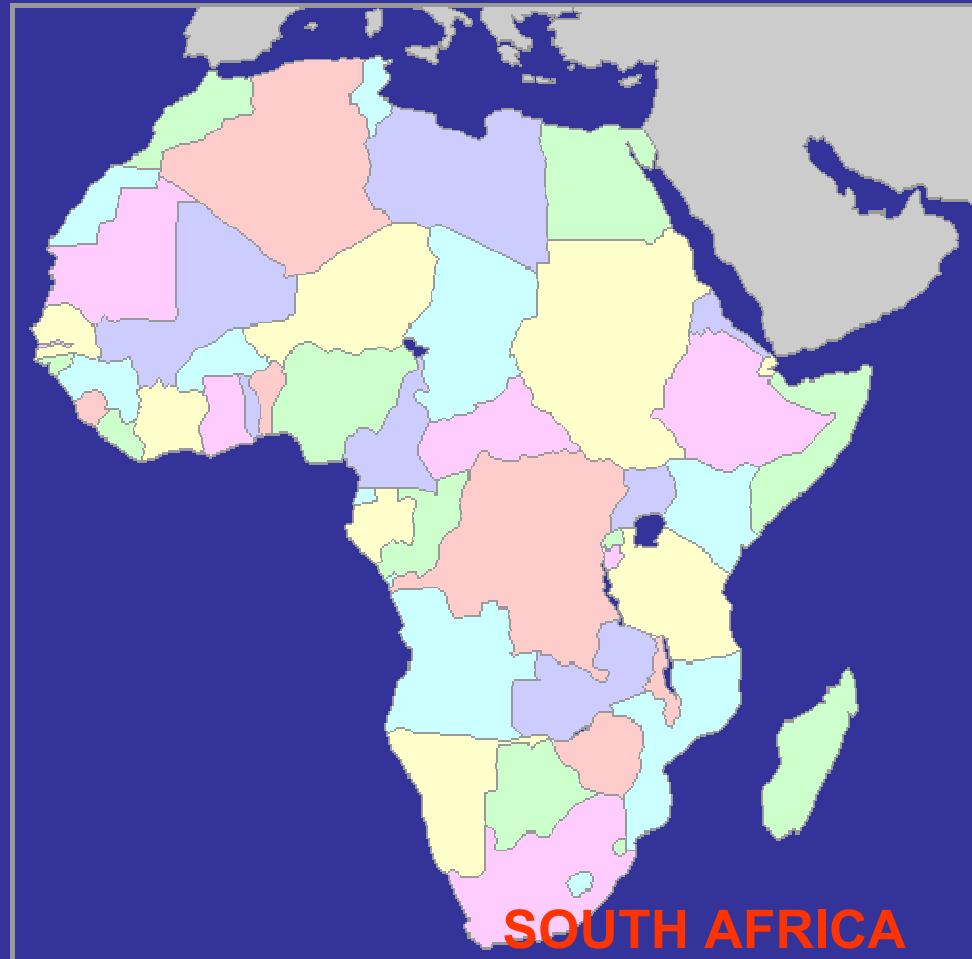
## **SOUTH AFRICA REPORT**

Beijing, China

6-10 November 2006  
John-Heyns Ferreira

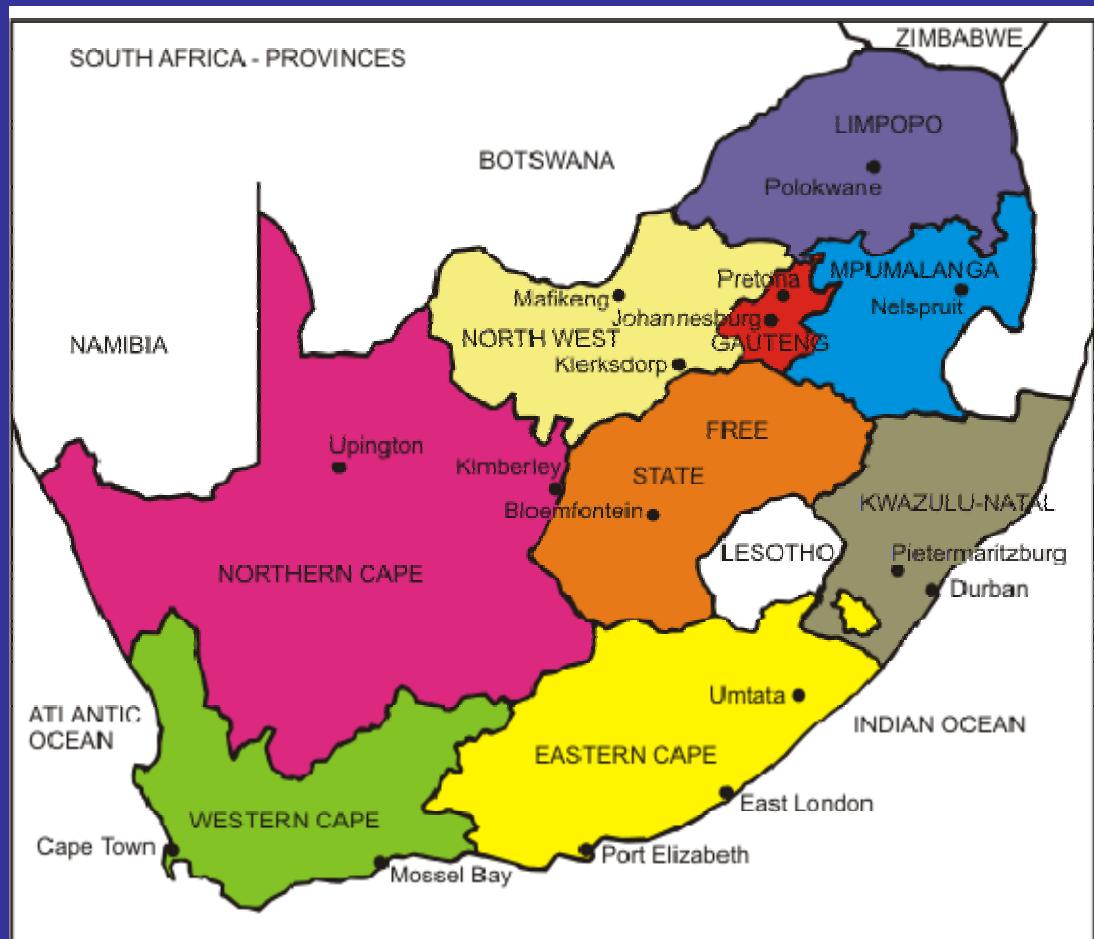


# AFRICA SHOWING SOUTH AFRICA





## 9 PROVINCES IN SOUTH AFRICA





## RH BACKGROUND IN SOUTH AFRICA

- Healthcare Services are provided by both Government (free) and Private Health institutions
- Reproductive Health forms part of Primary Health care in South Africa
- The bulk of Reproductive Health is provided by the government and private institutions account for a small percentage



## RH in SOUTH AFRICA - Fresenius Kabi

- South African market is covered by 5 reps calling mainly on state clinics
- Brand Manager – calls on key opinion leaders and manages the brand locally
- Education is the key focus
- Healthcare Practitioners mainly choose contraceptive methods on behalf of clients



## STATE CONTRACEPTIVE MARKET – SOUTH AFRICA

<b>Method used</b>	<b>% Usage**</b>
■ <b>Injectables</b>	<b>41%</b>
■ <b>Pill (oral)</b>	<b>12.3%</b>
■ <b>Condoms</b>	<b>2.1%</b>
■ <b>Female sterilization</b>	<b>12%</b>
■ <b>Male sterilization</b>	<b>1.7%</b>
■ <b>IUD</b>	<b>1.9%</b>
■ <b>Other</b>	<b>29%</b>

**\*\*Department of Health and Family  
Planning**



## INJECTABLES AVAILABLE IN SOUTH AFRICA

### - EDL listed

- **Petogen** (DMPA)  
(depot medroxyprogesterone acetate)
  - State and private
- Nur Isterate (NET-EN)
  - State and private
- Depo Provera (DMPA)
  - Private market



# WHO and SA NATIONAL CONTRACEPTIVE GUIDELINES

## The Following Women Can Use PETOGEN

- Women who are breastfeeding
- Women > 40 years of age
- Women who suffer from TB, malaria or diabetes
- Women who smoke
- Women who are HIV+



## SHORT HISTORY OF DMPA

### **Depot Medroxyprogesterone Acetate (DMPA)**

- 3 monthly injection (4 / year)
- progestogen-only injectable
- arguably the most extensively studied and widely used hormonal injectable
- registered and available in >130 countries
- used by millions of females globally
- Depo Provera developed by Pfizer – the brand
- has been extensively used by Aid Agencies



## SHORT HISTORY OF OTHER INJECTABLES

### **Norethisterone Oenanthate (NET-EN)**

- 2 monthly injection (6 injections / year)
- progestogen-only injectable
- registered in > 60 countries
- Nur-Isterate developed by Schering the brand product

### **Combined Injectables**

- monthly injection (12 injections / year)
- Cyclofem / Lunelle
- containing progestogen and estrogen



## BRIEF SWOT ANALYSIS of PETOGEN

### Strengths

- Local manufacturer (Africa for Africa)
- Quality Generic (International)
- Cost-effective (International)
- DMPA POI of choice (International)
- Dedicated sales team (South Africa)

### Weaknesses

- Slow penetration of Petogen globally (International)
- Capacity increase timing



## BRIEF SWOT ANALYSIS of PETOGEN cont'd

### Opportunities

- Substantial market share gain both locally and internationally
- Petogen as a core product for Fresenius
- “Proudly” manufactured in South Africa
- Ideal for state healthcare patients

### Threats

- Loss of units due to social grants for additional children (South Africa)
- Marketing & Sales strategies by competitors (South Africa and Internationally)



## PETOGEN VIAL SHOT





# GROWTH IN PETOGEN SALES IN SOUTH AFRICA

**INDEX  
ONLY**

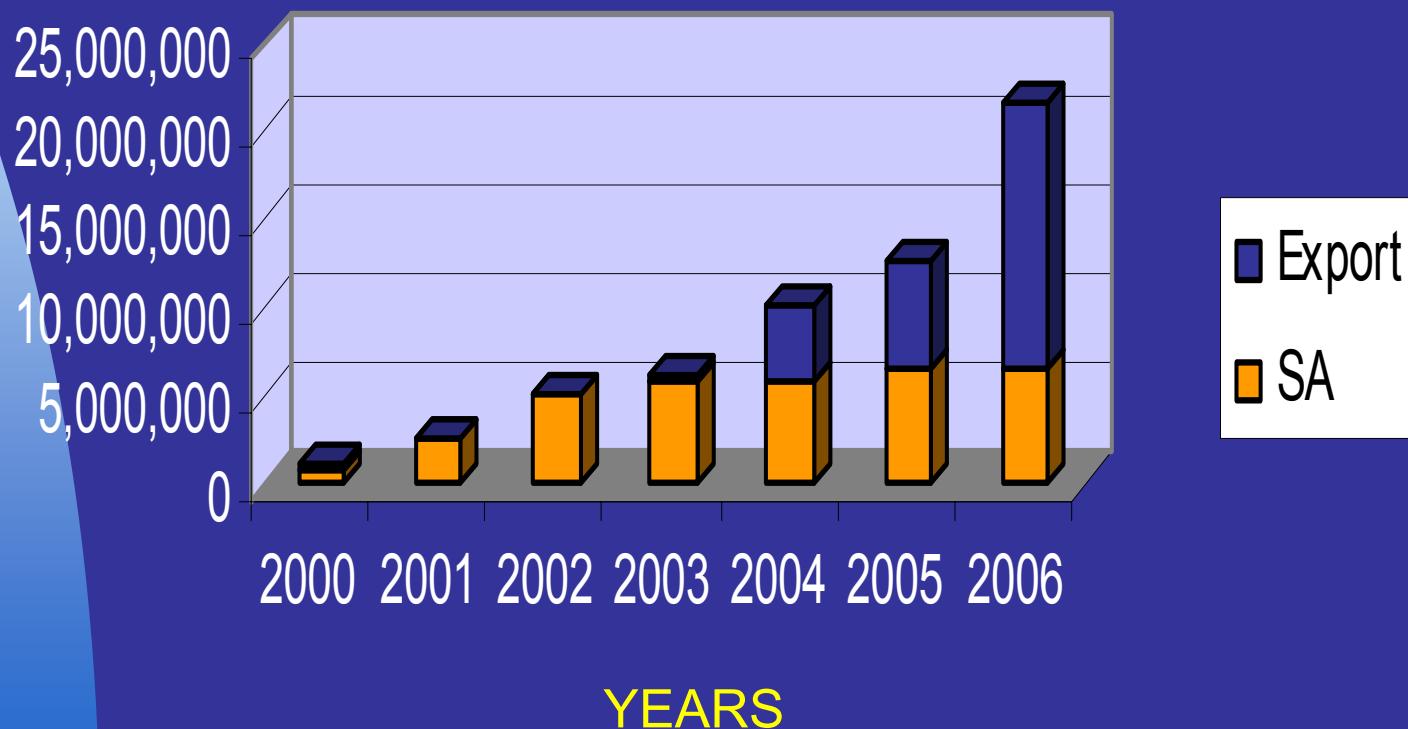
Territory	2006 (YTD)	2005 (YTD)	GROWTH
Eastern Cape	5,875	4,377	++
Free State	2,400	2,700	--
Northern Cape	920	1,170	--
Mpumalanga	2,276	2,640	--
Gauteng	9,107	7,853	++
North West	3,300	2,867	++
Limpopo	3,420	2,650	++
Kwa-Zulu Natal	8,451	7,735	++
Western Cape	4,703	4,498	++
South Cape	650	800	--



## SALES DEVELOPMENT OF PETOGEN

### South Africa and Export

UNITS





## ONGOING CHALLENGES FOR FRESENIUS

- **CAPACITY** – sufficient to meet expanding demand
- **CURRENCY** – ongoing fluctuations
- **TENDERS** – risky nature of the business
- **WHO** – pre-qualification
- **DEMAND** – aim to smooth demand / forecast
- **EDUCATION** – all markets
- **PACKAGING** – variations in format
- **REGULATORY** – variations per country



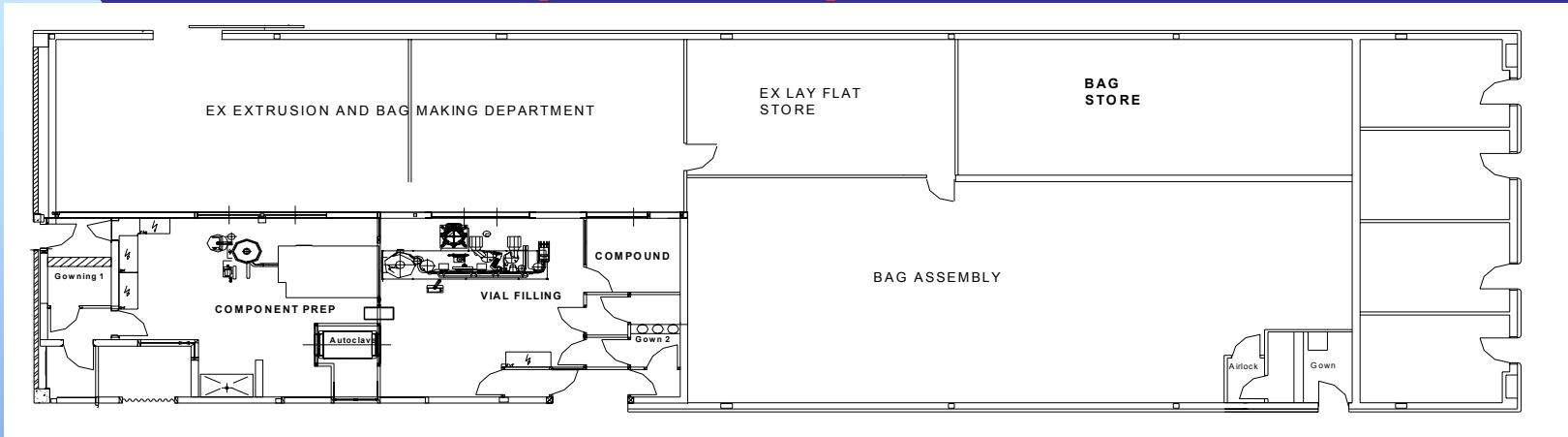
## OVERCOMING CHALLENGES

- **INVEST** – increased manufacturing capacity
- **BALANCE** –ongoing demand/capacity
- **PORTFOLIO** – inc hormonal portfolio thus inc market
- **STABLE** – supply by co-operation and agreement
- **RELATIONSHIPS** – ongoing building with relevant parties
- **MARKETING** – affordable generic and social marketing

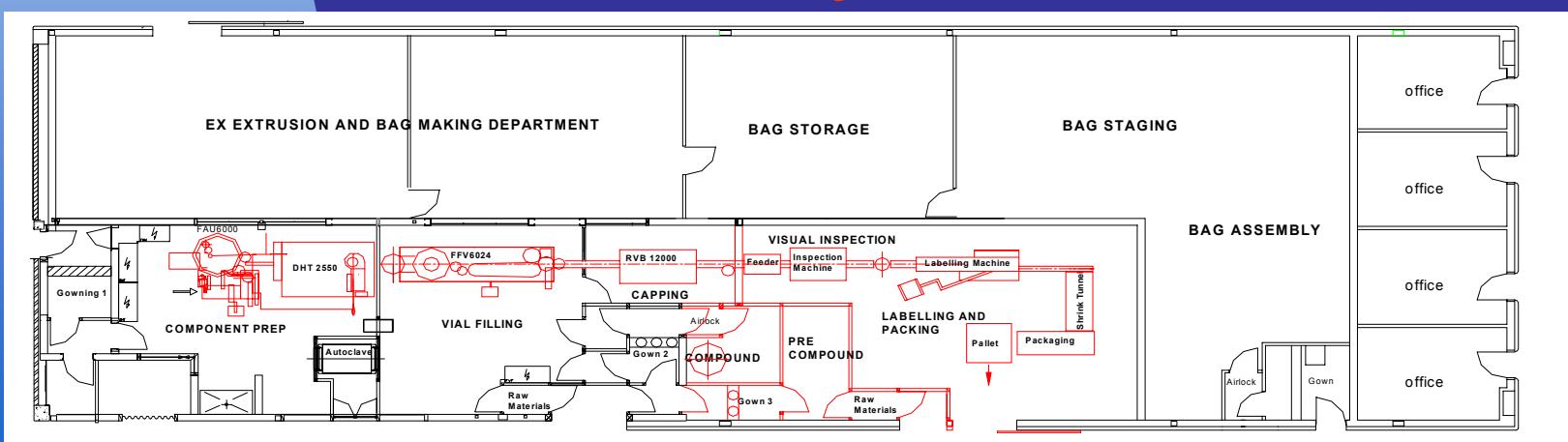


# FACTORY INCREASED CAPACITY 2006

Current previous layout



current layout





# **PAST PETOGEN MARKETING CAMPAIGNS IN THE SOUTH AFRICAN CONTEXT**



Fresenius Kabi South Africa

“WHEN TIME COSTS MONEY”

**Fresenius Kabi**  
**TIMES**  
Petogen Information Guide  
Volume 1, Issue 1

**PETOGEN**  
150mg MEDROXYPROGESTERONE ACETATE ADMINISTERED FOUR TIMES YEARLY

**When time costs money**

**PIL**

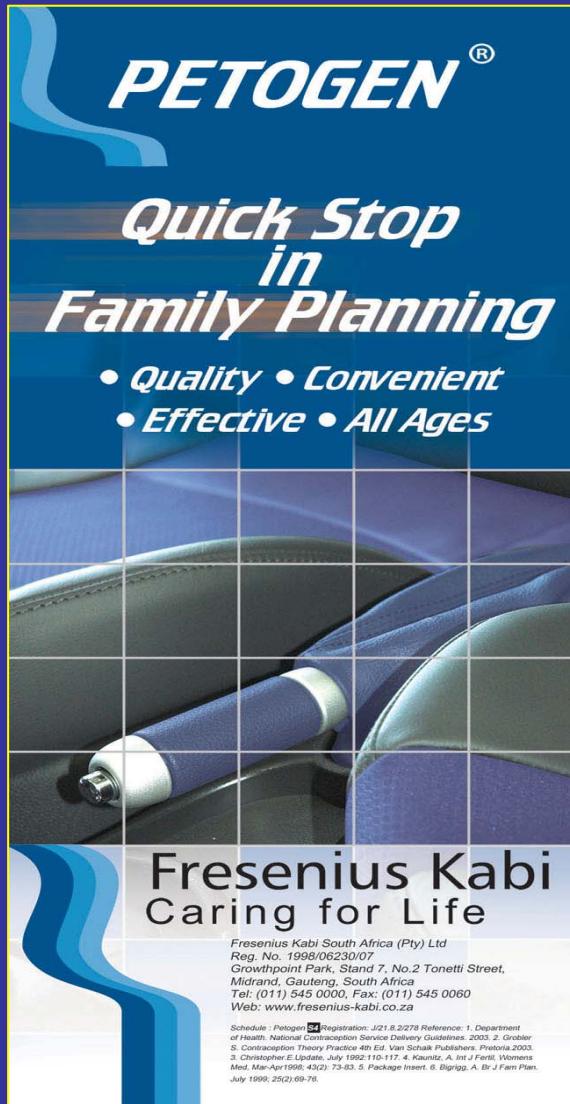
# POSTER

# “SAY YES TO PETOGEN”



# "QUICK STOP IN FAMILY PLANNING"

## POSTER DETAIL AID



**PETOGEN®**

*Quick Stop  
in  
Family Planning*

- **Quality**
- **Convenient**
- **Effective**
- **All Ages**

**Fresenius Kabi**  
Caring for Life

Fresenius Kabi South Africa (Pty) Ltd  
Reg. No. 1998/06230/07  
Ground Floor, Block 7, No. 2 Tonetti Street,  
Midrand, Gauteng, South Africa  
Tel: (011) 545 0000, Fax: (011) 545 0060  
Web: [www.fresenius-kabi.co.za](http://www.fresenius-kabi.co.za)

Source: [www.fda.gov/cber/gv/contraceptives.htm](http://www.fda.gov/cber/gv/contraceptives.htm) 8/2003 Reference: 1. Department of Health National Contraception Services Delivery Guidelines, 2002. 2. Grobler S. Contraception Theory Practice 4th Ed. Van Schaik Publishers, Pretoria, 2003. 3. Christopher E Update, July 1992:110-117. 4. Kaunitz, A. *Int J Fertil. Womens Med.* Mar-Apr 1990; 45(2): 73-83. 5. Package Insert. 6. Biggs, A. *Br J Fam Plan.* July 1999; 25(2):69-76.



## CONCLUSION

**CONSTRUCTIVE** – dialogue and communication

**CO-OPERATION** – all stakeholders in this market

**PRODUCT** – provide a quality product at globally affordable price

**SUPPLY** – the correct product at the right time and right place