

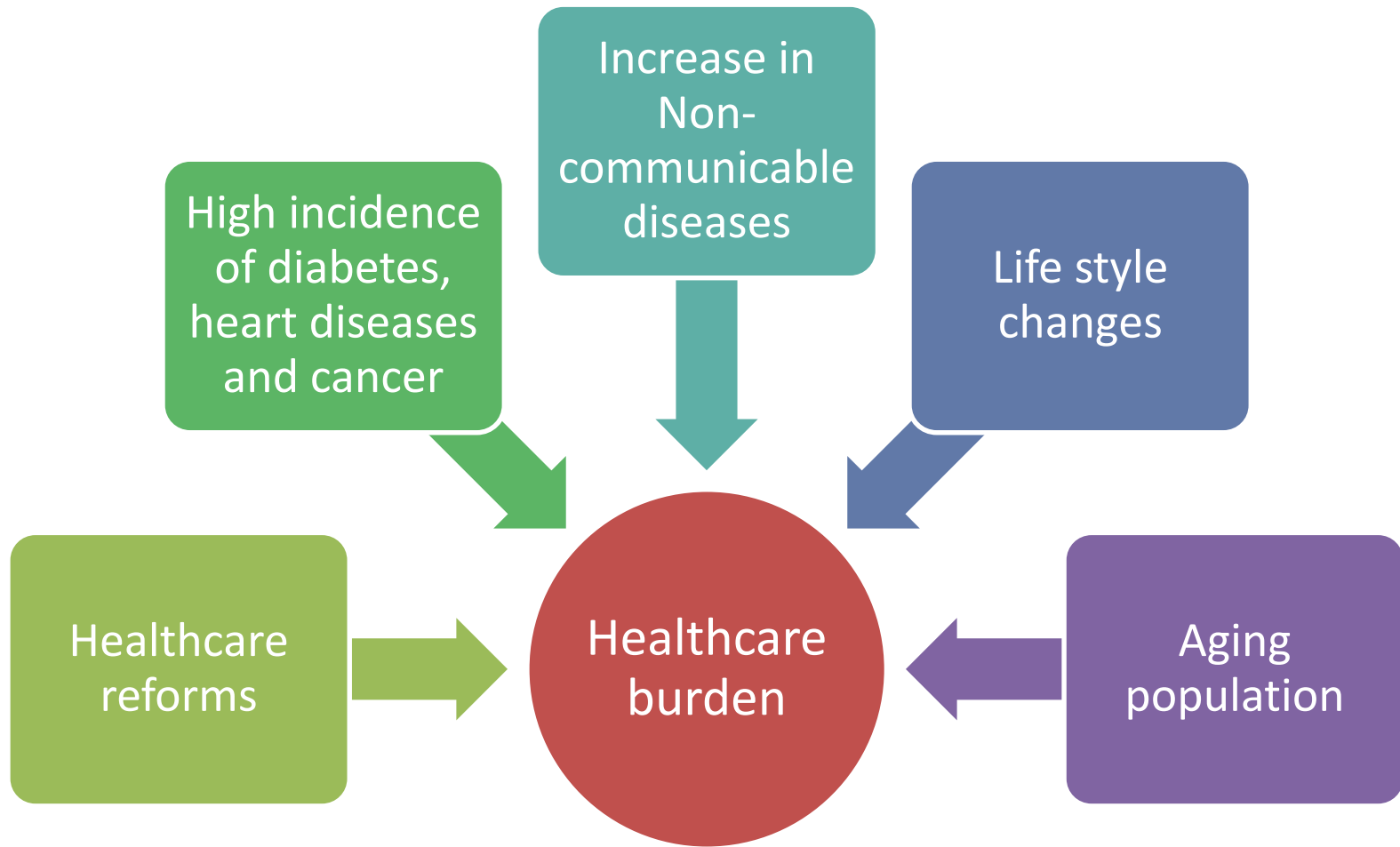


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Asia Pacific Consumer Practice in Self-Care: Market Trends

Vivek Dhawan
Chief Coach/CEO

Healthcare system: Challenges



People are living longer, population is increasing, existing healthcare services will struggle to cope hence SELF CARE has to be a critical solution

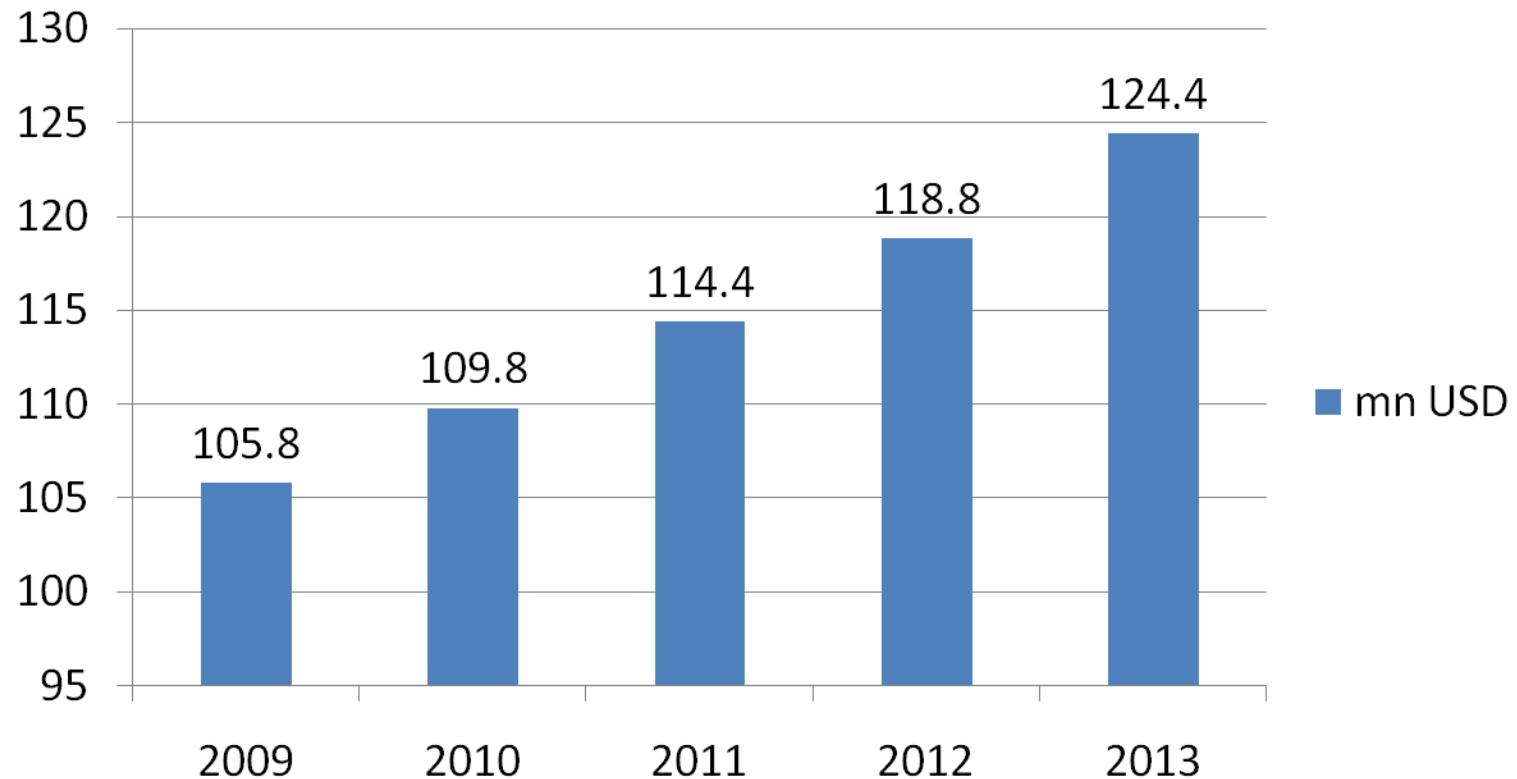


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Global OTC Sales has been rising



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Over The Counter Medicines

Self-care medication are universal practice, possibly 75% of health care is undertaken without professional intervention

Worldwide OTC sales 2013
US\$ 124 billion

Well defined OTC classification in regulated markets



(Source – Euromonitor International)

Asia-Pacific: Land of diversity



Ethnicity
Culture
Language
Food
Religion
Soil
Climate
Regulation



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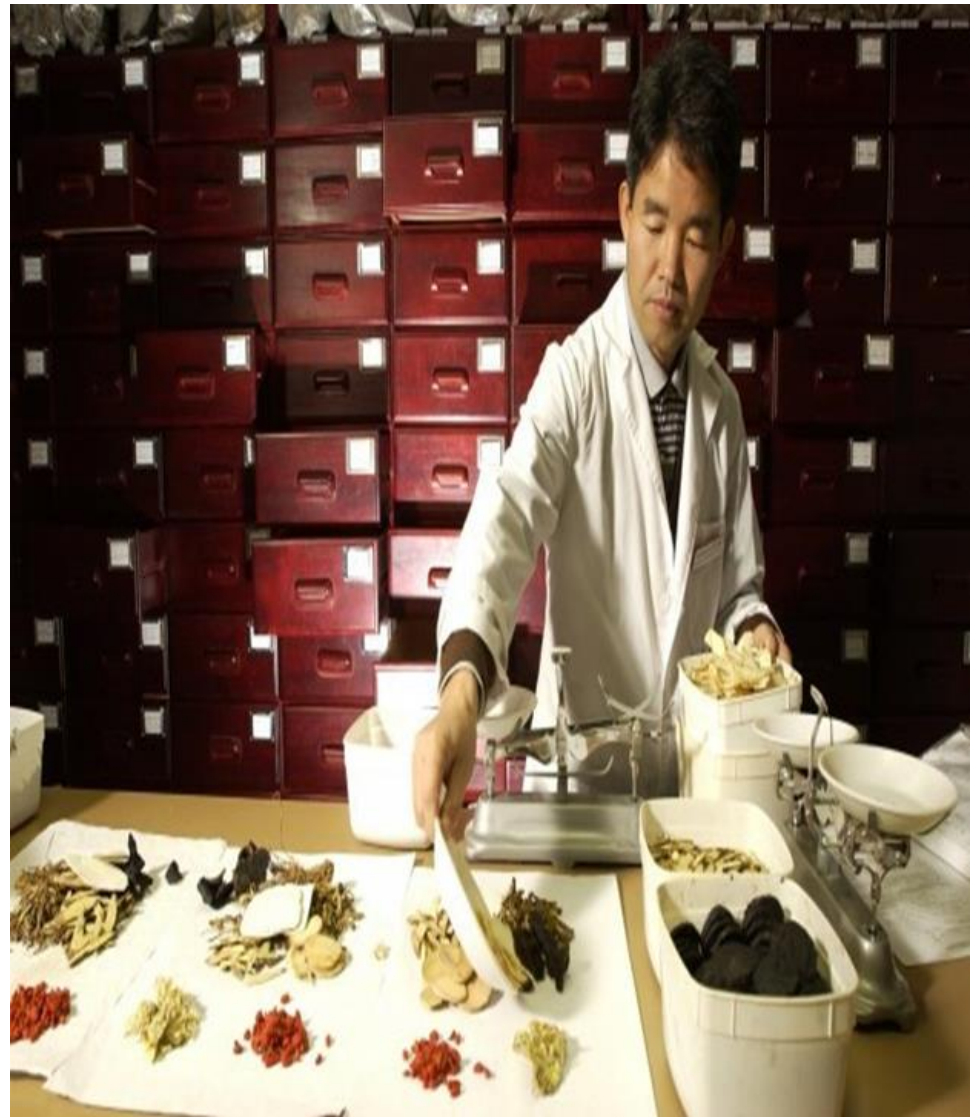
Over The Counter (OTC) Drugs: Asia-Pacific

Definition of OTC varies significantly from that in West

OTC medicines refers to herbal or traditional medicines provided by traditional healers and pharmacies

Regulatory classification for OTC medicines are unclear or non existing

East & SE Asia generate US\$ 26.6 bn in OTC sales in 2013



OTC medicine: Practice

Developed countries

Well defined OTC classification

Strict regulation

Available in supermarkets and pharmacies

Advertising permissible for OTC

Doctor's Prescription is mandatory for buying drugs at pharmacy

Developing countries

Traditional or herbal medicine referred as OTC

Regulation not followed

Available in pharmacies only

Advertising constrained by regulation

Prescription drug can be bought with ease - under the counter- at most pharmacies

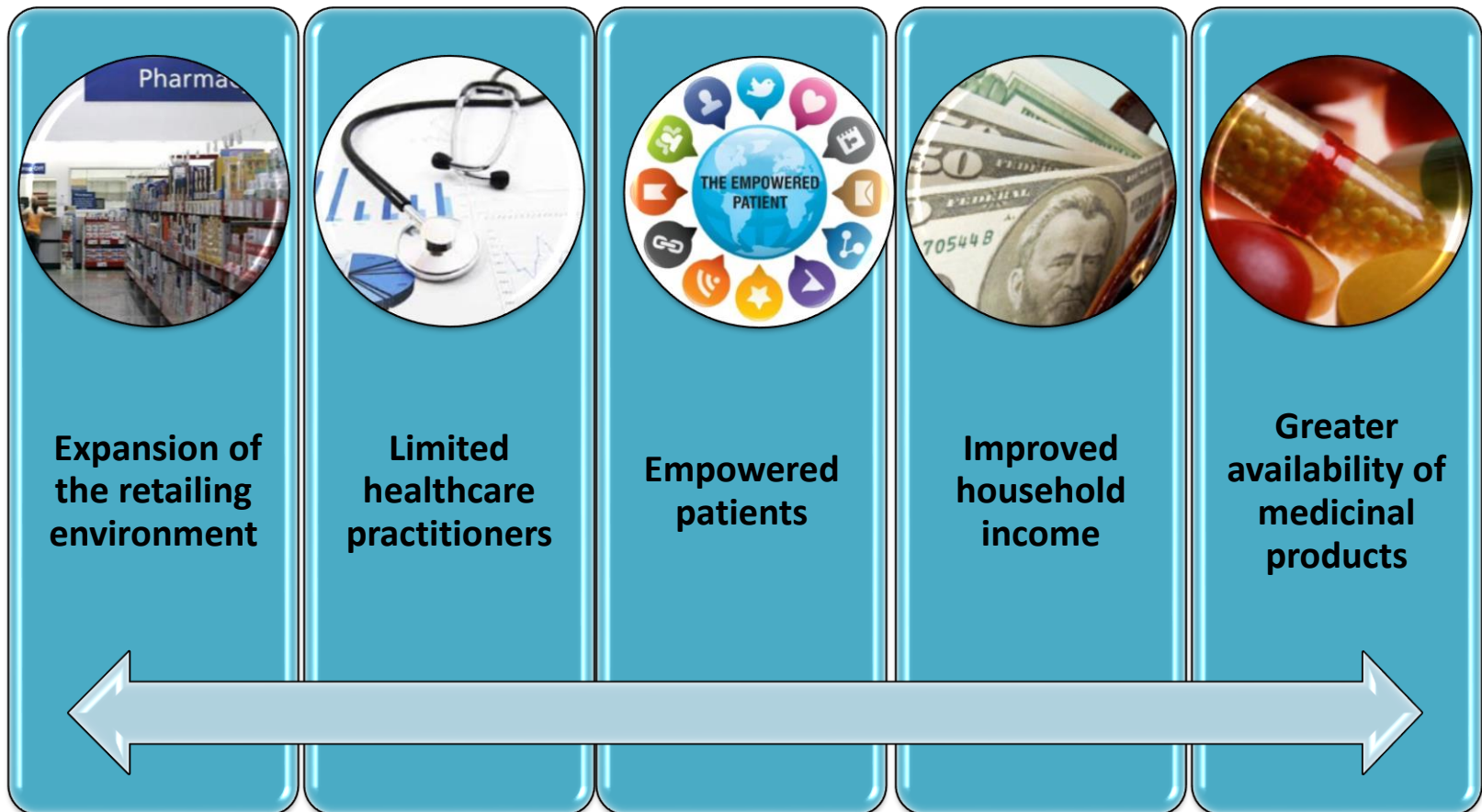
Regulatory Guidelines on OTC Medicines

Functions	Regulated market	Semi-regulated market
Regulatory guidelines for prescription drugs	✓	✓
Regulatory guidelines for OTC drugs	✓	✗
Advertisement for OTC	✓	✗
Point of OTC sales	Supermarkets/ FMCG outlets/ Pharmacies	Pharmacies

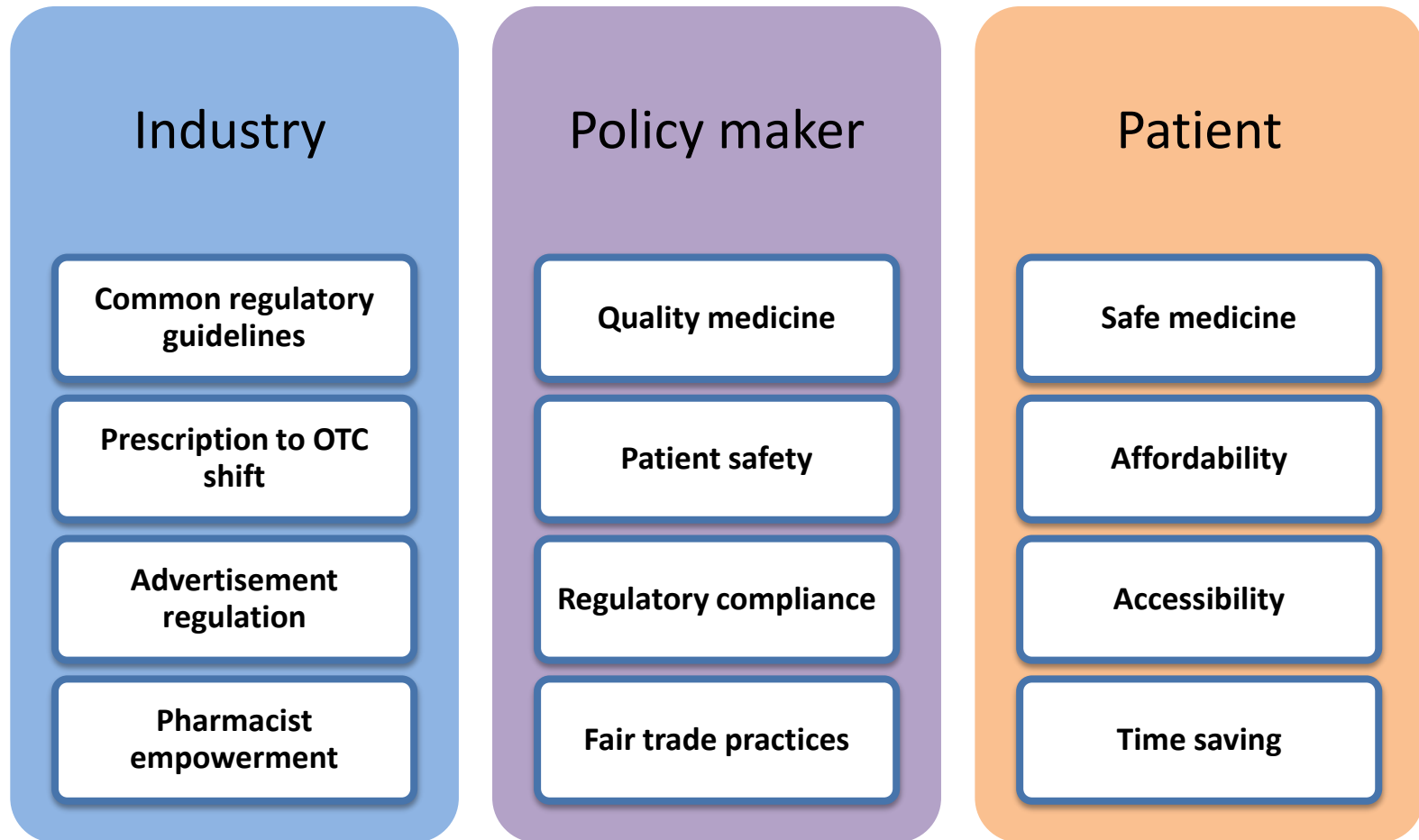


Prospect of Self care in Developing world

OTC markets in most emerging countries are expected to grow

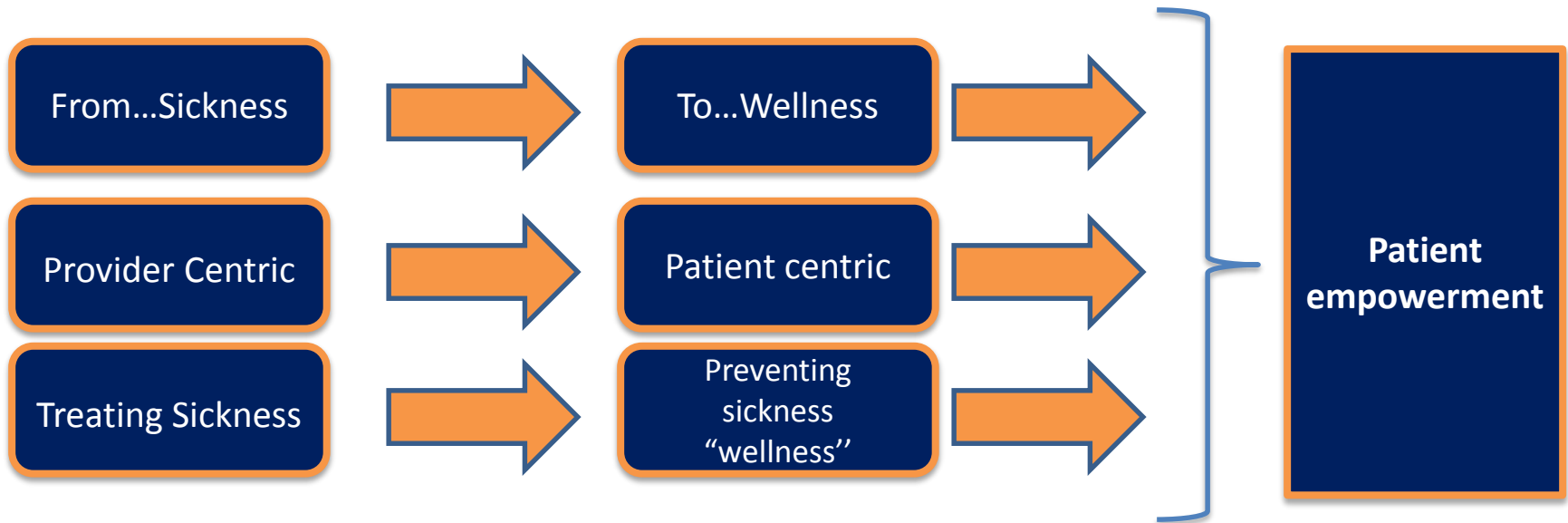


Self Medication : Perspectives of stake holders



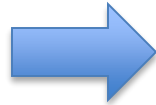
Healthcare paradigm shift

Changes in lifestyle and demographics leading to a paradigm shift



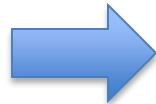
Disruptive paradigm shift to address Healthcare challenges

Escalating non communicable diseases



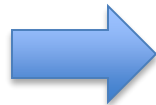
Patient care should transferred away from hospitals to doctors' offices, and away from the doctors to nurses

Aging population



Promote wellness approach rather than sickness.
Incentive for remaining healthy

Rising cost



Shifting treatment paradigm for minor ailment from doctors to pharmacist



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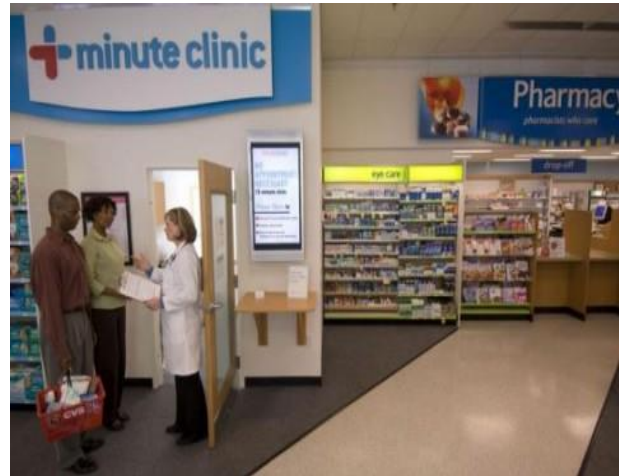
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Healthcare: Disruptive business models in west

In pharmacies health clinics staffed by nurse practitioners



These clinics offer a limited menu of non-emergent screening services and routine treatments



Self medication is Imminent

However simply following the developed countries regulation for self medication will not work in Asia

because ...

Poor healthcare infrastructure

Limited healthcare professionals

Absence of formal OTC drugs classification

Regulation

Drug abuse



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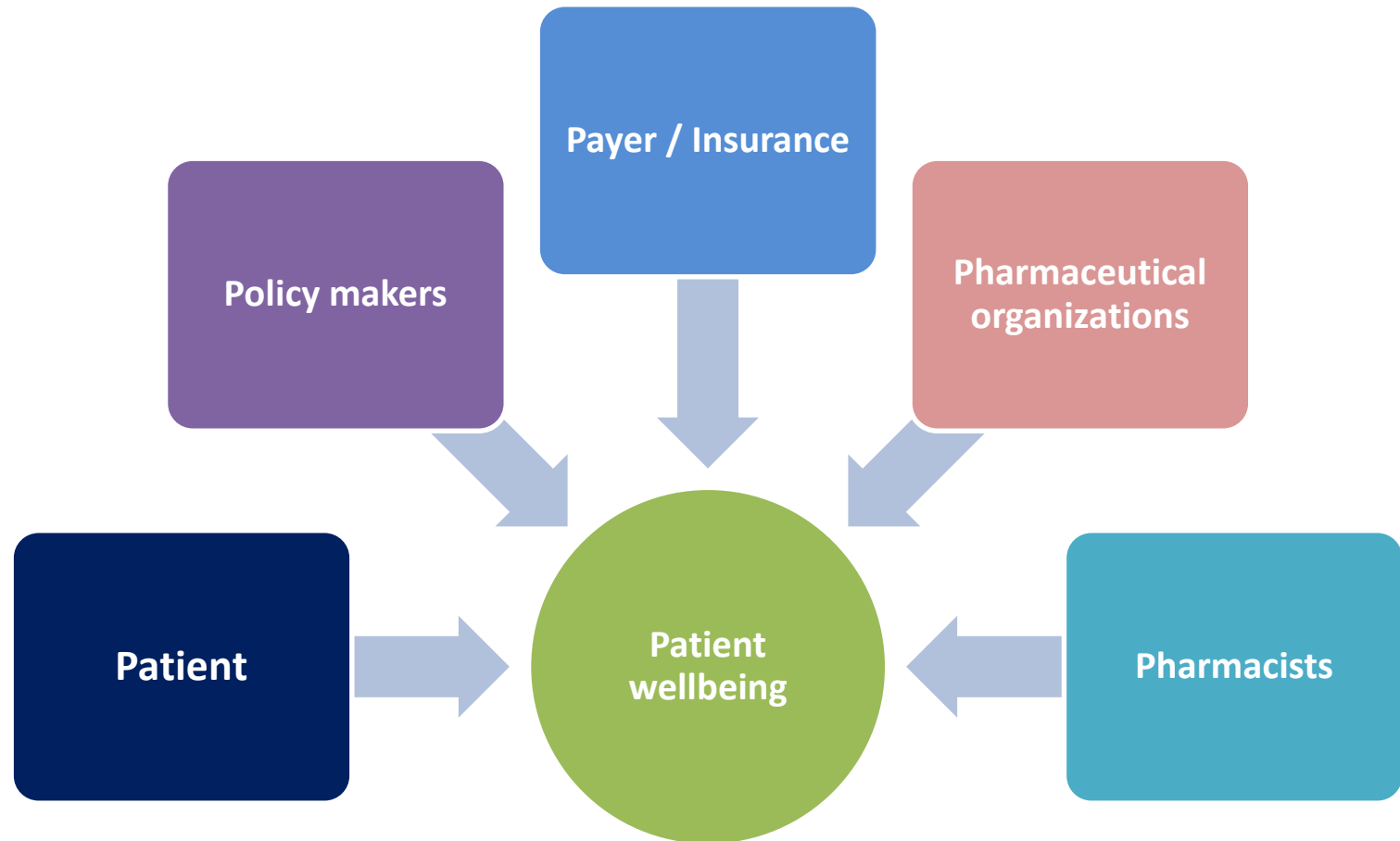
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Self medication may also cause conflicts

- Pharmaceutical industry
 - Large players versus small players
- Regulators versus pharmaceutical companies
- Patient versus reimbursement companies



Self care development: A shared responsibility

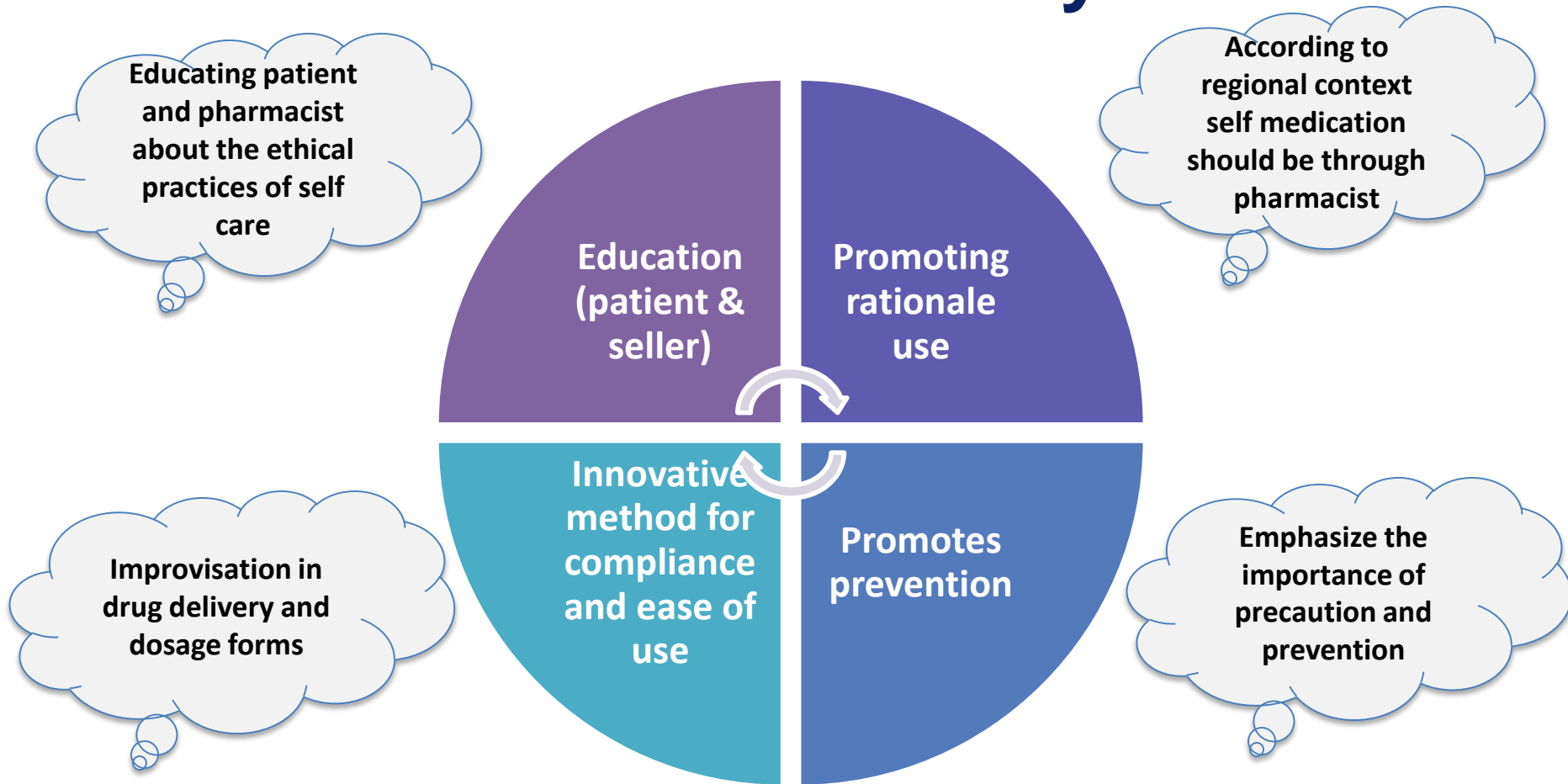


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Holistic approach for enhancing **access, use** **and affordability**



Pharmaceutical Industry



Safe effective drugs for primary care shift to Over The Counter (OTC)

Cost, dosage form and packaging has to be patient friendly

Patient education not aggressive brand promotion

Effective storage solution

Self regulation on exaggerated and false claims



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Regulators

Advertisement guidelines for OTC products



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graph TD; A[Advertisement guidelines for OTC products] --> B[Penalize offenders]; B --> C[Governing principles for industry conflicts]; C --> D[Framework to prevent drug abuse];
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Penalize offenders

Governing principles for industry conflicts

Framework to prevent drug abuse



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Asian Regulatory bodies

Work towards harmonization of regulatory requirements and work sharing within the Region – leading to speed of Registration and launch



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Payers / Insurance companies



**Include essential OTC medicine
for reimbursement**



Quick and fair settlement



INCLUDED

**Include more disease for
reimbursement**



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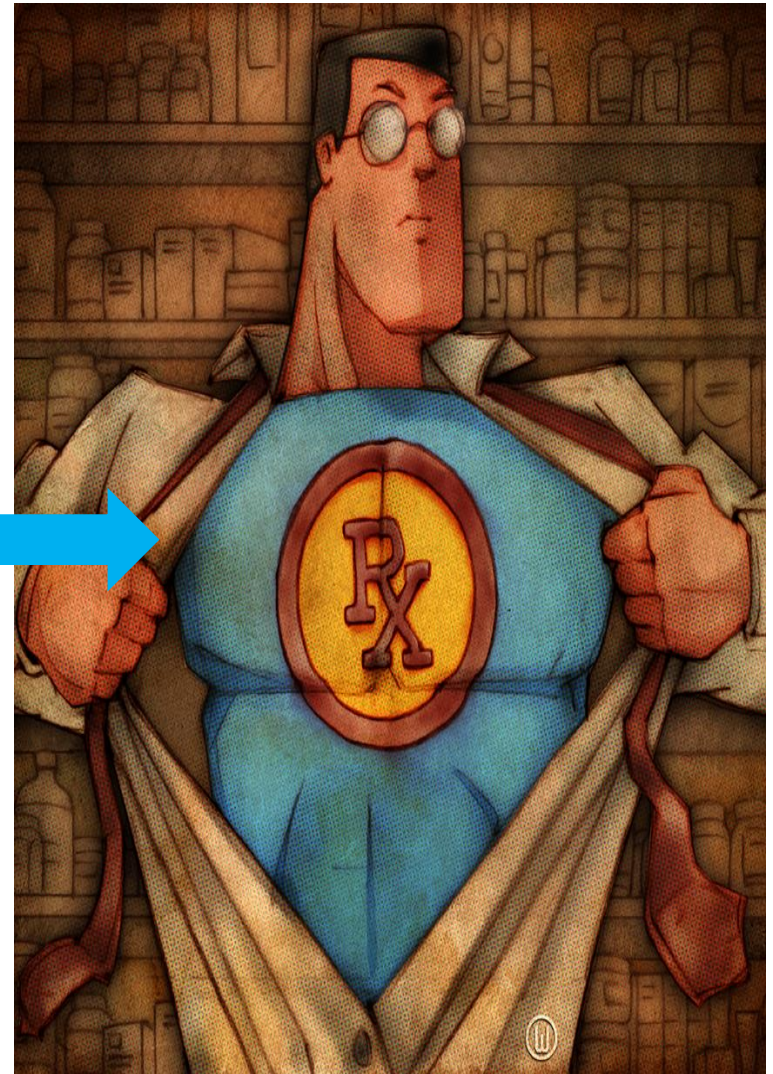
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With self medication inevitable,

PHARMACIST

**can play a crucial ROLE in
implementing safe self care
in developing world**

Role of Pharmacist: Access to pharmacist is access to health



Shift to pharmacist assisted self care Could Leads to



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Conclusions?

In Developing World....

- ☐ *Serious medicine prescription should remain in doctor's realm*
- ☐ *Strict implementation of rule in dispensing medicine*
- ☐ *Pharmacist should be empowered and trained to recommend medicine for minor ailments*



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for

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Thank You

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