



# Vector Control in Indo-Pacific Region

Case Study

<b>Client</b>	A leading pharmaceutical company
<b>Industry</b>	Pharmaceuticals
<b>Products</b>	Vector control products

## Engagement Scope

**1 Market Landscape**

- What are the country-level needs for vector control? Who are the key players active in the complete value chain, and how are they organized in the market?
- What are the key benchmarks and differences of the Indo-Pacific region as compared to the African region for vector control practices and market trends?
- What is the potential for novel vector control products/tools?
- What are the key market trends, drivers, and constraints for vector control products?

**2 Market Access Landscape**

- What are the different procurement routes/channels for vector control products? What are the expenditure trends per route/channel?
- What is the level of vector control-related spending by government bodies, communities, individual households, etc.?
- Which are the gap analysis tools used to identify gaps among willingness to pay, overall spending, awareness levels, Burden of Diseases (BoD), type of channels, etc.? What could be the possible solutions to bridge these gaps?

**3 Insights & Conclusion**

- Overview of each individual country and its regulatory pathway
- Details of complete processes involved in introducing a VC product
- Global, regional, and local regulatory processes
- Recommendation on programs and innovations
- Gap analysis of current procurement processes and identification of root causes
- Comparison of the Indo-Pacific vs. Africa markets
- Best practices in market access

## Context

- The client wanted to understand the Indo-Pacific markets as well as the current/upcoming technology used for vector control. The study helped in mapping and providing an improved understanding of the way users obtain vector control products, examining market access barriers, and studying the functioning of regulatory systems for novel product approvals.

## Key Business Questions

- What is the regional overview of each individual country in terms of population trends, health status, types of diseases, epidemics, and others?
- What are the market barriers for suppliers, vector control implementing organizations, and consumers?
- What are the regulatory requirements and lead times required for new product approvals?

# Research Methodology

## Secondary Research

- Referred to databases of international agencies such as WHO, World Bank, IMF, and UN; company websites; annual reports; published interviews of key industry leaders; government statistical bodies; MoH; industry associations; and consortiums
- Acquired information from PubMed, medical journals, industry reports, conference/summit proceedings, other specific databases, etc.

## Primary Research

- Conducted interviews of KOLs & industry experts; entomologists; members of the Ministry of Health, Global Donor Organization, NGOs, and research institutes; and stakeholders from different business segments

# Benefits to Client

- The study helped the client develop market access strategies that could accelerate penetration of new products/tools for the control of vector-borne diseases.
- It also helped in gap analysis of current procurement processes and identification of suggestive solutions, which further assisted the client streamline financial resources and understand country registration processes.

# Sample Analysis

**1 Country Profile & Demographics Distribution**

The infographic is divided into two main sections. The top section, 'Country Profiles in context of VBD', lists countries like India, Vietnam, and Thailand, providing details on their VBD status and geographical context. The bottom section, 'Demographics Distribution', focuses on Indonesia, showing its population, GDP, and a map of the country with regional breakdowns. It also includes a pie chart showing the distribution of the population across different regions.

**2 Healthcare Structure**

The infographic is divided into two main sections. The top section, 'Indonesia - Status of Malaria Elimination by Province Till 2018', features two bar charts showing the number of malaria cases by province for January and September 2018. The bottom section, 'Healthcare Structure', is a hierarchical diagram showing the flow from the Ministry of Health down to various levels of healthcare facilities, including National Health Centres, District Health Centres, and various types of health centres and hospitals.

**3 Vector Control Products**

The infographic is divided into two main sections. The top section, 'Global Fund distributed ~70% (2.3 Mn) of total mosquito nets distributed in 2017', includes a flowchart showing the distribution process from the Global Fund to various stakeholders. The bottom section, 'Most of the retail products are refillable and for temporary application', contains a table comparing the potential of various vector control products. The table has columns for Product Type, Company, and various product attributes like Refillable, Temporary, and others, with green and red dots indicating the status of each attribute.

Product Type	Comparing Potential of Vector Control Products/Tools										
	Company	Refillable	Temporary	Reusable	Long-lasting	Easy to use	Cost-effective	Refillable	Temporary	Reusable	Long-lasting
Global Fund	Global Fund	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Other	Other	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

# Thank you

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