



OTC HEALTH & WELLNESS CONFERENCE

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Acknowledgements

OPPI expresses gratitude to our partners and stakeholders for their valuable contributions to our **OTC Health & Wellness Conference**. We extend our sincere thanks to our esteemed Speakers and participants along with over 150 Delegates across the CHC Industry, reputed Institutes, and Government and International Organisations who participated in the conference and contributed to our efforts in facilitation of the government in developing the OTC & Self-care framework, besides enabling OPPI in adopting a collaborative approach to build a responsible self-care practice in our country.

We sincerely thank all the Speakers, Experts, Policymakers and Dignitaries for such a passionate engagement during the day. We specially thank our Chief Guest, Mr. A.K. Pradhan, Joint Drug Controller, CDSCO for gracing the occasion and sharing pearls of wisdom with all of us. We also remain obliged to Dr. Hemant Koshia, Commissioner at FDCA-Gujarat; Mr. N.K. Ahooja, Ex-State Drug Controller Haryana & Chairman of Government Constituted OTC Committee; Mr. Amit Duggal, Assistant Commissioner Drugs FDA Punjab, for their presence and participation in the conference. Importantly, we remain grateful to all the Delegates present during the conference, besides many who joined us online.

We appreciate the presence of Mr. Milind Thatte, Chair, OTC Committee, Managing Director, P&G Health; Dr. Ranjit Mehta, Executive Director, PHDCCI; Mr. Sudarshan Jain, Secretary General, Indian Pharmaceutical Alliance; Mr. Azadar Khan, Sr. Vice President, Sun Pharma Ltd and Mr. Bejon Misra, Founder, Patient Safety and Access Initiative of India.

We also thank our partners IPA, FICCI and PHD chambers for their support in making the OPPI's OTC conference a success. Our gratitude extends to multilateral organizations, international government bodies, academia, private sector leaders and civil society. We appreciate strong support from our Knowledge Partner IQVIA. We thank our sponsors Bayer, Cipla Health, Sanofi and GoAptiv. We earnestly thank the OPPI Executive Committee team for all the guidance on the conference.

Executive Summary:

OTC Health & Wellness Conference

The Indian consumers today are increasingly adopting self-care and self-medication practices to beat the rising cost of healthcare and rising incidence of lifestyle disorders. This makes it critical for the industry to come together and foster a responsible self-care environment. Keeping up with this objective and addressing this critical need, The Organization of Pharmaceutical Producers of India (OPPI), along with the key industry stakeholders, organized a first-of-its-kind OTC Health & Wellness Conference 2023 on 3rd of November 2023.

This conference proved to be a pivotal platform that united stakeholders to address critical challenges and chart a path forward for the pharmaceutical industry. Centred around the theme '**Swasthya Uday, Antyodaya**', the conference ambitiously engaged participants to deliberate upon access to medicine, regulatory gaps and the formulation of a comprehensive over-the-counter (OTC) framework.

Some of the key objectives of the conference that were deliberated on included:



Addressing Access to Medicine Responsibly: The conference highlighted the pressing issue of global access to medicine, which is particularly significant in India where rural areas face a shortage of medical practitioners, leading to a need for clear guidelines, awareness and dispensing regulations



Existing Regulatory Framework & Identified Gaps: The discussion centred on the details of the current regulatory structure, which lacks specific definitions for OTC medications, leading to interpretations based on the absence from certain schedules or rules. Recognized concerns persist due to the lack of clear definitions for non-prescription drugs



The Road to an OTC Framework: Deliberations were underway to establish an OTC policy. Though the pandemic temporarily impacted timelines, a draft rule has been published and is undergoing refinement based on stakeholder comments. Crucially, the conference emphasized the need for a holistic approach in drafting the OTC policy to ensure clear interpretations and address ambiguities



Industry Role in Implementation of Responsible Self-care: With multiple consumer health stakeholders, the conference included extensive deliberation on how various touch points from pharmacists to brand communication, product packaging and technology can be leveraged to ensure last-mile delivery of responsible self-care



Keynote Perspectives:

Noteworthy speakers, including Ms. Nitika Garg, Mr. Anil Matai, Mr. Milind Thatte, Dr. Ranjit Mehta, Mr. Sudarshan Jain and Mr. Bejon Misra, emphasized the urgency of responsible self-care, ethical industry engagement and regulatory enablement, shaping the environment for a conducive OTC segment.

This was followed by **insightful sessions by industry experts** such as Ms. Anama Dimapilis-O'Reilly from Sanofi, Mr. Sandeep Verma from Bayer Consumer Health, and Mr. Nicholas Hall who delved into critical areas such as technology's role in enabling self-care, market trends and opportunities in the post-COVID-19 era, outlining essential strategies for growth and market expansion.

Highlighting the Self-Care Readiness Index (SCRI) initiative, Ms. Judy Stenmark, Director General of the Global Self-Care Federation (GSCF), detailed how in collaboration with the World Health Organization (WHO), GSCF conducted the indices across 20 countries, including India in Phase 2. Key findings indicated the potential for vast improvements in health outcomes through better self-care practices. The Indian profile emphasized the significant hours and costs that could be saved by integrating self-care practices, proposing substantial welfare gains and considerable savings for health systems.

Recommendations included:



Interesting panel discussion delved upon topics such as:



Responsible Marketing Approach in Self-Care, highlighting the necessity for responsible marketing to create awareness about self-care, shifting dependencies from doctors to pharmacists and enhancing the role of healthcare professionals (HCPs) and pharmacists in consumer education



Decoding the Digital Consumer, providing insights on how the digital landscape is shaping self-care, with a focus on leveraging technology, responsible messaging and building trust with consumers



Pharmacists as Responsible Advisors for Self-Care, wherein panelists discussed challenges and opportunities in empowering pharmacists as crucial influencers in self-care adoption and healthcare education

In summary, the conference set a definitive agenda, aiming to promote responsible self-care, establish a robust OTC framework, empower consumers with evidence-based information and pave the way for a collaborative and well-defined approach for the pharmaceutical industry in India.

The amalgamation of diverse perspectives and strategic insights outlined a clear pathway forward, emphasizing the need for collaboration, innovation and robust regulations to drive the Indian pharmaceutical industry towards a more accessible, informed and responsible future execution.

The importance of "self-care" in enhancing health and well-being was emphasized as it empowers patients while optimizing healthcare systems for achieving better universal health coverage.

CHIEF GUEST ADDRESS



Dr. A.K. Pradhan

Joint Drug Controller,
 CDSCO, Ministry of Health
 & Family Welfare (MoHFW),
 Government of India

Highlights

The issue of access to medicine and the arising need for regulations

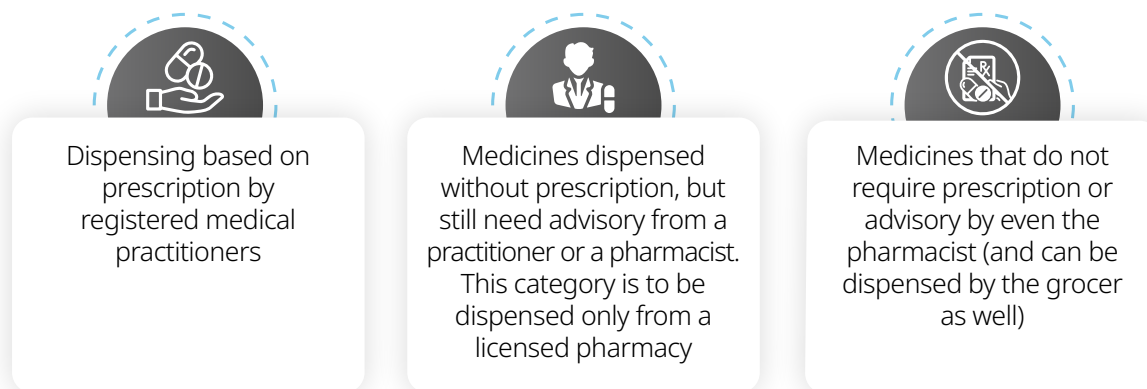
The OTC Health and Wellness conference is addressing a very critical issue of access to medicine, which is a global problem, including developed countries besides India. The issue is even more complex in the Indian scenario as rural areas lack medical practitioners to guide people on drug safety and usage of prescription drugs. Hence, the OTC guidelines, awareness and dispensing-related issues become important subjects as well.

Given the criticality, all stakeholders, including the government of India, recognize the issue. This issue has been under deliberation for a long time and discussed by state drug controllers in almost all DCC meetings. The deliberations focus on the kind of guidelines and regulations required to provide clarity to all stakeholders including the consumer, the healthcare provider and the pharma industry.

Our current regulatory framework and recognized gaps for prescription and OTC drugs

OTC and self-care are frequently used terminologies; however there is no mention of the same in our current regulatory guidelines. That does not imply that regulations and rules do not exist for them. There are defined rules for prescription and non-prescription (OTC) drugs.

In our regulations, medicine dispensing can be classified into three broad classes (the same is seen across many countries):



In our rules and regulatory structure, the aforementioned classes of drugs are not clearly outlined and need to be interpreted, specifically the OTC category that has not been mentioned at all. For example, guidelines define prescription drugs as those falling under Schedules G, H, H1 and X and Rule 96, which excludes some additional categories such as tranquilizers, analgesics and anti-diabetics that are still considered prescription drugs. Then, there is Schedule K that includes some exemptions given in terms of retail or wholesale license, which are products that can be sold through grocery shops. However, drugs that do not fall under any of the aforementioned prescription drug schedules (G, H, H1, X, K) and Rule 96 may not necessarily be considered OTC/non-prescription drugs. This leads to ambiguity and indirect interpretations due to the lack of comprehensive regulatory provisions defining the OTC and self-care framework as well as the complex nature of the Indian system with extremely few doctors in the villages, which makes accessing prescription drugs difficult. This is a recognized need by the regulatory bodies who plan to create clear-cut guidelines for these classes as well as separate regulations for OTC thereby providing clarity to all stakeholders such as consumers and pharma industry and healthcare providers.

The way forward on the OTC framework and policy

Though the government has prioritized the OTC framework policy, there have been delays due to other circumstances like COVID-19. The draft rule has already been published based on the recommendations of a sub-committee of DCC chaired by Mr. Ahuja. Subsequently, the government has received comments from the stakeholders to further refine the draft policy, which are under serious consideration.

The draft is the first notification where the OTC terminology has been used. However, much more deliberation is needed in this matter. There is a need to consider aspects such as strengths and formats of molecules before defining these as OTC. For example, topical preparations of certain Schedule H drugs are non-prescriptions such as Diclofenac tablet is considered a prescription drug, but the Diclofenac gel is not.

While India claims to be the pharmacy of the world, we too have complex problems related to access to medicine that need to be deliberated and resolved with a clear policy framework and collaboration of all stakeholders.

WELCOME ADDRESS



Ms. Nitika Garg

Director Research, OPPI

Ms. Garg, lead for the conference, welcomed the dignitaries and guests to the OTC conference themed '**Swasthya Uday, Antyodaya**'. She set the context for the conference by sharing a glimpse into India's healthcare system, highlighting glaring gaps like:

Shortage of doctors with only 0.60 doctors per 1000 patients

Uneven access to healthcare, leaving the rural population more underserved

Low health insurance coverage with less than a third of households covered

With these challenges, self-care emerged as the most searched term during COVID-19 and transformed beyond a trend to become a lifeline that can ease the burden on our stretched healthcare system. Through responsible self-care, India can save upto 30,720 crore rupees, and a OTC and self-care framework will enable to:

Provide valuable and clear information about products for specific ailments

Minimize the risk of use or abuse of medications

Help individuals make informed healthcare decisions

Reduce out-of-pocket expenditure

Contribute to overall health and wellness

Hence, the conference '**Swasthya Uday, Antyodaya**' - last-mile access for the patients in India, was set rolling with the clear objectives of:

Promoting responsible self-care amongst individuals

Providing a platform for regulators, industry professionals and researchers to share their insights on OTC

Being the steppingstone for the establishment of a robust OTC framework in the country

Empowering consumers by giving them evidence-based information about the appropriate use and safety of OTC medications

OPENING REMARKS



Mr. Anil Matai

Director General, OPPI

Mr. Matai, in his opening remarks, shared how self-care is not a new concept in India and has been practiced for ages. The self-care practices got compounded with COVID-19; however the need of the hour is 'Responsible Self-Care'. He highlighted that the intent of the conference was to engage each of the stakeholders in shaping an environment, which was much more conducive for the OTC segment, and suggested three key areas to focus on:



SETTING THE CONTEXT



Mr. Milind Thatte

Chair, OTC Committee,
 Managing Director, P&G
 Health

Mr. Thatte highlighted how the 20-year journey of the joint efforts of our esteemed regulators, industry associations, patient groups, consumer groups and HCP groups has culminated into the draft OTC guidelines for India. The OTC task force led by OPPI and supported by industry associations – Indian Pharmaceutical Association (IPA) and FICCI has been at the forefront in shaping the draft OTC policy.

01

Its first whitepaper on the topic of self-care was published in 2018 with the help of the knowledge partner, Cubex, a division of Havas Healthcare. This paper highlighted the need for OTC medicine regulation in India and benchmarked it with developed countries. The paper was inaugurated by Dr. Chandrashekhar, Deputy Drugs Controller of India, and one of the first guides for the OTC taskforce.

02

The next whitepaper was on the value of OTC, published in 2021 again in partnership with Havas Healthcare. This paper was based on a large-scale market research covering more than 3,000 households and 10,000 individuals, reporting about 6,700 common ailments. The data were projected to over 123 mn population.

The OTC taskforce was honoured to be guided by Mr. Pradhan, Joint Drug Controller, CDSCO; Mr. Amit Duggal, FDA Punjab and Mr. Bejon Misra, Founder, Patient Safety and Access Initiative of India during the course of submitting its recommendations. Mr. Thatte also thanked Mr. Ahuja (in his previous capacity as Chairman Ahuja Committee) for OTC regulations and for now being the advisor to the taskforce. Dr. Ahuja's penchant for last-mile access to patients has been the guiding force in shaping the agenda of the 2023 conference.

He thanked colleagues and knowledge partners for the conference—Ms. Nitika Garg, Director Research, OPPI who has led the agenda of the conference and partnered with different industry associations; Ms. Susan Josi, Ex MD, Havas Healthcare; Mr. Venu Ambadi, the first chair of the OTC taskforce and Mr. Satyanarayana, Ex chair of the OTC task force.

Mr. Thatte shared that the OTC conference agenda would focus on engaging interesting and thought-provoking topics of Responsible Self-care, Enabling the Last-mile Access to Basic Healthcare; Global Consumer Health Trends; India SCRI; Digital Consumer and Role of a Pharmacist in Self-care.

He concluded by making a humble submission to Dr. Raghuvanshi and Dr. Pradhan on behalf of the OTC taskforce to bring the OTC guidelines into effect for the benefit of patients and consumers.

KEYNOTE ADDRESS



Dr. Ranjit Mehta

Executive Director, PHDCCI

Dr. Mehta expressed gratitude to OPPI for holding this programme at the PHD chamber of commerce and industry (A 119-year-old organization reaching to more than 115 thousand companies all over India). He emphasized the significance of the conference in creating awareness about OTC and the need for last-mile access to patients. Dr. Mehta also expressed how the nation's economic progress is directly related to the health of people, which impacts productivity. He shared his concern on the shortage of doctors, specially in our villages (where the ratio is 1:1,511 vs globally, where it is 1:1,000), and the situation is compounded by new passed out medical graduates who are not inclined to practice in villages. Hence, arises the need for training the pharmacist to promote responsible self-care and cover for this gap. He set expectations from the day:

01

To help understand how an ecosystem can be created for the pharmacist to enable self-care

02

Make individuals aware of the importance of healthcare and self-care

03

To enable everyone in the conference and beyond to practice self-care and sensitize other people in their network about self-care benefits

Mr. Mehta thanked the organizers and expressed that PHDCCI would like to collaborate on such noble programmes in future.

KEYNOTE ADDRESS



Mr. Sudarshan Jain

Secretary General, Indian Pharmaceutical Alliance

He spoke about four mega trends that demand the release of a policy on Responsible Self-care and five interventions, which are required going forward.

The four mega trends that demand the release of a policy on responsible self-care are:

01

Healthcare is central to everything, and the patient wants empowerment. COVID – 19 demonstrated how people took charge of their health, with the penetration of oximeters, glucometer, blood pressure instrument, zinc preparation, and paracetamol preparation in every household and an effort to build immunity with OTC products such as Chyavanprash

02

The United Nations sustainable development goal aims that by 2030, 80% of the consumers should be able to avail healthcare wherever and whenever they want. We have currently achieved only 30%–40% of the goal. This demands immediate attention of world healthcare stakeholders

03

We are moving from acute to chronic illnesses and preventive care is fundamental. Example: Diabetes care – 8%–9% of the population is suffering from diabetes. There have been major innovations in this space for diabetes management such as patches, glucometer, and easy-to-use insulin pens. We now talk about the management of diet, exercise and diabetes and not just about the diabetes. This shows the importance of integrated self-care for chronic illnesses

04

Digitalization – proliferation of smartwatches, virtual consultation as needed and many more healthcare-related use cases to improve access

The government has released several policies that we thank them for such as API and PLI 1. The PLI 2 research policy was announced last week, and many more policies, including the draft OTC policy, was announced on 25th May 2022. As next steps, the government is requested to move forward on the OTC- and responsible self-care-related policy as it will reduce the burden on doctors and make healthcare more accessible in our country.

Five big asks to further the OTC policy are:

- 01 Government to draft a regulatory framework for prescription products to switch to OTC
- 02 Advertising policy and label guidelines for OTC must be drafted to make it easy and safe for the consumer
- 03 Pricing guidelines are critical as there is a need to account for the total cost of healthcare to the consumer and not just the cost of an individual pill
- 04 Distribution – we have a significant population of chemists; however, there is still an opportunity to broaden the availability for OTC products across other channels, given the vast population of India
- 05 The capabilities of pharmacist must be improved to play a critical role complementary to doctors and help the patient

Hence, there is a great opportunity to make a difference to healthcare in India, which is at an inflection point, and responsible healthcare is the need of the hour.

KEYNOTE ADDRESS



Mr. Azadar Khan

PHD, Sr. Vice President, Sun
Pharma Ltd; Co-chair, FICCI
OTC Committee

Objective of the day is to discuss how to move from a curative to a preventive healthcare system and provide timely intervention in terms of OTC regulations and policy.

Self-medication prevalence in India is around 45%, and given the size of this OTC market, estimated at USD 6.5 bn, clear guidelines, including advertising guidelines are demanded to ensure better functioning of the industry and better healthcare access and information to the consumer. OTC is a consumer-centric approach to healthcare. The ambiguities currently existing in the system need to be wiped out with the help of this policy.

While the current priority of CDSCO is to sensitize the industry on the new Schedule M; however, OTC is also an important agenda needing attention, and the involved stakeholders have been awaiting clear regulations on this for a long time.

KEYNOTE ADDRESS

What it takes to foster responsible self-care?



Speaker:

Mr. Bejon Misra

Founder, Patient Safety
and Access Initiative of
India

Importance of the responsible self-care model - Health and safety of citizens are of paramount importance and cannot be negotiated under any circumstances. In a country like India, where healthcare infrastructure is not easily accessible to each individual, specifically in remote and rural areas, access to the self-care model can be a win-win situation for all stakeholders, that is, consumers, healthcare providers, institutions as well as regulators. It will redeem some pressure on the existing healthcare network to a large extent and result in the saving of time and cost for consumers.

KEYNOTE ADDRESS

Roadblocks in implementing responsible self-care:

01

The self-care model can only be implemented by spreading sound education and awareness amongst consumers with credible information. Even until now, we have gaps in the proper prescription monitoring programme, which cannot be afforded in case of self-care. Hence, OTC regulations must be implemented to ensure a responsible self-care model

02

Regulators need to introduce these regulations with clear guidelines as we have for prescription drugs. OTC regulations are already being discussed with regulators for a long time now, deliberating concerns around quality and safety of this model. However, these are already overdue and should be launched as soon as possible for timely implementation

03

Parallely, the accessibility and affordability in the same must be improved to ensure last-mile access of self-care products, along with relevant education and awareness campaigns



KEYNOTE ADDRESS

How to implement responsible self-care?

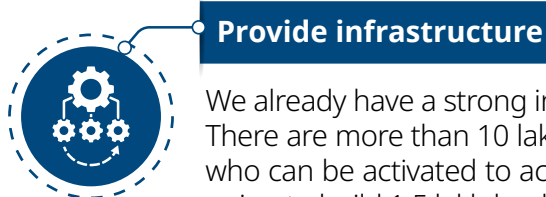
To implement the self-care model, all stakeholders, that is, regulators, marketers and healthcare experts, need to come together and play their roles with full responsibility

Role of regulators



Create awareness

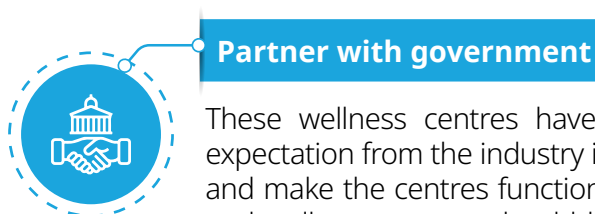
Launch good campaigns, such as Jago Grahak Jago, to spread the next level of awareness and education amongst consumers for the self-care model. This can be done by using proper labelling and information in the local language of end users – both patients and caregivers



Provide infrastructure

We already have a strong infrastructure that can be leveraged for new models. There are more than 10 lakh Accredited Social Health Activists (ASHA) workers, who can be activated to achieve last-mile connectivity. The government is also going to build 1.5 lakh health and wellness centres in the country over the next 3 years, of which 20,000 centres are ready as on date. Regulators can ensure timely completion of these wellness centres within given timelines

Role of industry:



Partner with government

These wellness centres have to operate on the PPP model. Hence, the expectation from the industry is to proactively engage with state governments and make the centres functional to the best of their capacities. These health and wellness centres should be developed into the first point of contact for patients and used to create a relationship with them, which is lacking today



Technology implementation

The industry can also leverage technology in common service centres of the government, where consumers are already connecting digitally for various services. The industry can leverage these centres to connect with consumers to increase awareness and education on self-care, until all wellness centres have been built and launched

KEYNOTE ADDRESS

Role of healthcare experts and academia

Consumers already have high dependency on pharmacists in India. In fact, they play a more significant role than medical practitioners because of the ease of accessibility for consumers. The role of pharmacists can be explored in more detail for responsible self-care and while establishing OTC regulations.

Responsible self-care trends in select key global markets



Speaker:
Ms. Anama Dimapilis-
O'Reilly

Corporate Affairs for
 Consumer Healthcare in
 Sanofi

Self-Care Continuum – It is for lifetime. While we usually look at studies from developed countries like the UK, US or European nations, India can take learnings from regional countries like the Philippines, where universal health is happening in real life. The status of self-care conditions in the Philippines are considerably similar to those of India and Africa, where people do not have easy access to self-care but are still progressing towards different creative ways of taking care of themselves.

Though everyone uses self-care in some form or the other right from the beginning of life. The Philippines government is also trying to bridge the gap with right education. The government is also using technology to increase literacy and consumer trust to ensure that people can differentiate between right and wrong information.

KEYNOTE ADDRESS

As per a recent study by EU ASEAN, consumers' confidence on self-care has increased after COVID-19. This study has emphasized that self-care is not just about minor ailments such as cough, headache issues. Self-care is a continuum that ranges from minor conditions to major conditions where care is required before and after treatment. Hence, self-care extends throughout the lifetime of an individual.

Benefits of self-care and its growing importance

The self-care benefits everyone whether its the patient, government or industry participants through various forms such as improved quality of life, better productivity, lower cost burdens, stronger healthcare systems, expansion of new channels and pharmacies and higher tax contribution. Some studies conducted in the UK have highlighted that investment in self-care can save 1.4 bn pounds for the government.

While members of the global self-care market emphasize regularly on the value of self-care, we need to drill down to the country level to understand the reality. In countries like India and the Philippines, where a lot of people work are employed on daily wages, people cannot afford continuous absence for visiting doctors or healthcare facilities for longer duration. Hence, self-care is a part of life since generations and centuries, and some findings like below further highlight why we need to address self-care as an organization.



Prescribed medicines - In the Philippines, which is a spread-out archipelago with limited access to medical professionals, consumers frequently end up hoarding, splitting or not finishing cycles of medicines. They very frequently share the medicines with family members who are not part of the prescription



OTC medicines - Regarding the OTC status in the Philippines, medicines for common ailments such as common colds, stomach ache, diarrhoea and headache are easily accessible in high-frequency stores and online. Filipinos interact with a pharmacist 12 times more than that with a doctor. However, half of the country lives in rural areas that do not have easy access to pharmacists as well. Hence, mom n pop store owners resell OTC products in fake jars in rural areas, which increases the risk of counterfeit products. India to has similar examples where 70% of the region does not have access to healthcare systems, and people in rural India get an opportunity to meet a doctor only once or twice a year



Ethnomedicine - Despite the OTC status being available, distribution in a spread-out archipelago is very challenging, with consumers opting to use ethnomedicine for the same ailments that they would otherwise use OTC medicines or even prescription medicine. For example, the use of guava juice for anti-inflammation not just in minor ailments but also in serious conditions is a common phenomenon

KEYNOTE ADDRESS

Learnings from countries with the OTC status

Steps being implemented in policy regulation



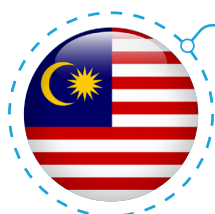
Vietnam

Currently, similar regulations exist for the advertising of OTC and prescription products. Hence, the government is trying to implement following regulatory changes in the OTC policy:



Thailand

- Hospital congestion with minor illnesses causes cost and resource burdens for universal health coverage (UHC)
- Pharmacy/drug stores could be alternative options for patient's access to medications for the treatment of minor illnesses
- UHC allows patients with 16 common illnesses to visit and receive medications from drug stores, thereby enabling better patient access and ease of the healthcare system



Malaysia

- Established - A reform framework with reform and strategies
- The reform pillar includes advancing promotive and preventive health, strengthening public health function, promoting collaboration and incentivizing both financial and non-financial measures

KEYNOTE ADDRESS

Measures being implemented for product registrations

Thailand



The Guideline for Electronic Submission of Modern Drug Application was published in June 2023. 'Low-risk medicinal products' and 'Abbreviated dossier' requirements are included in the new guideline

For Abbreviated review – eligible for low-risk ingredients according to the ingredient from TGA complementary medicines/compendial or monograph ingredient or natural products of Health Canada/US FDA OTC monograph/ ingredients from the health supplement or Thailand Food Act/Cosmetic Act adherence

Thai FDA is in the process of developing a list of low-risk medicinal products and complementary medicines

Philippines

The pilot ROTCA project was launched in 2018

Reduced dossiers for Tier 1 – Household remedy and Tier 2 – Pharmacy only or OTC medicines. Different requirements for Tiers 1 and 2

Reduced evaluation timeline

The government and industry will explore the development and full implementation further



Taiwan



Simplified registration process for OTC drugs applied in 2020 for:

OTC drugs have been granted marketing approval for >10 years in the A10 countries or NDA with new combination, new dosage form, new strength and new administration dose

Simplified technical dossiers including the data related to Pharmacology & Toxicology, the literature publication, clinical trial report and assessment reports from other countries could be accepted/exemption of Pharmacokinetic data for some categories of NDA and clinical data could be simplified or waived for some new combination or new dose

KEYNOTE ADDRESS

Use of technology for unlocking better health literacy

Led by the Self-Care Association in South Africa, regulators have approved authorization to proceed with a pilot to remove the PIL out of the pack and replace this with a QR code to link the product to the PIL in question to the Online Medicines' Directory

Sanofi CHC has piloted various e-labelling interventions in markets in food supplements, complimentary medicines, and OTC medicines (where status exists). Pilots range from end-to-end Sanofi-led or connected systems to country health authorities or a third party platform

With consumers seeing pharmacists 10-12 times more often than doctors in SEA, pharmacists are key partners in enabling self-care. SwipeRx and KlikDokter are two platforms that reach remotely located pharmacies and provide CPD-credited lessons on counselling, inventory and health literacy

More confident consumers after COVID-19

Consumers are more confident than ever about self-care, with a strong belief that medication for minor ailments should be available more widely and across channels. Governments should also incentivize and support people for self-care at home.

KEYNOTE ADDRESS

How technology can enable responsible self-care and access for consumers



Speaker:
Mr. Sandeep Verma

Country Head, Bayer
 Consumer Health

India is a country of billion dreams with a huge workaholic population. While our income and living standards have improved over the last few years, our tendency to work without a break has also increased, which reflects an unhealthy work culture. People feel sceptical to take leaves and continue to work even in health conditions such as headaches or gastric problems, which eventually impacts their productivity in the long run.

COVID-19 has already established the importance of responsible self-care. Self-care results in saving the cost and time for individuals as well as reduces the burden on country's healthcare infrastructure. However, lack of awareness and knowledge restricts people from adopting self-care. In absence of credible knowledge, people rely on internet or social media, which eventually leads to misinformation and confusion. Unstructured and complex information becomes very overwhelming at times, which makes it difficult to understand and act upon it.

Therefore, the need of the hour is to bridge the gap of awareness, knowledge, understanding and action with the right set of information to drive self-care adoption.

KEYNOTE ADDRESS

Four key drivers to encourage self-care

Given the success of digitalization that India has seen during and after COVID-19, technology can be the binding force for driving self-care. While there are >600 mn smartphone users in India, there is another set of population that is still using feature phones or unable to leverage smart phones to the full extent. People in remote areas, senior citizens or visually impaired citizens are connected on phones but do not have or want to access complex digital applications for daily use. Emerging technologies in artificial intelligence (AI) can be leveraged in such cases with various use-cases:

Accessibility to healthcare and wellness for all socio-economic classes/demographics can be achieved by using:

Voice-driven health interactions

01

based on AI can be leveraged for accessibility and inclusivity of people with limited connectivity. People can simply call on a phone number and inform about their medical condition. The system in return asks them to press the option buttons and choose the kind of therapy they need. For example, the Saridon-Aarampur app is a voice AI-based solution meant for people in semi-urban and rural India who cannot speak

Natural and intuitive interactions

02

with devices can be even more helpful than typing. This can increase adherence to health apps and devices as users find them more engaging and less tedious. For example, imagine someone telling a device like Alexa to play relaxation therapy music for 5 min in case of stress

Real time feedback and monitoring

03

can be leveraged in case of emergency situations. Voice assistants can offer instant responses based on users' queries, giving real-time health advice or information in crucial situations where swift response matters. For example, in moments of anxiety or panic, a user can ask Siri to guide them in the absence of doctors, friends or family

KEYNOTE ADDRESS



Making wellness easy to achieve

Wellness can be easily achieved with the intersection of AI and self-care. AI algorithms can absorb, analyze user's data and make recommendations based on unique Indian demographics, behaviours and cultural nuances. These algorithms can be further enhanced to manage evolving wellness needs of different stages of life, such as pregnancy, or specific health challenges and dietary habits. Such solutions can be scaled up with personalized customizations like regional languages or cultural preferences of users.

For Example, 'GOQii' offers personalized fitness recommendations. Using AI, the platform may tailor workout routines based on local preferences such as traditional Indian dance workouts or making different recommendations from first trimester to post-partum stages of pregnancy. Apps like HealthifyMe offer dietary solutions in regional cuisines or integrate traditional meditation practices for stress-related problems.

Getting consumers to anticipate instead of just reacting to health issues

Predictive health monitoring systems can be established for real-time data analysis, anomaly detection to identify unstable health patterns, adaptive feedback and merging various data sources to obtain a holistic overview, which is invaluable, given the diverse practices of the Indian population.

For example, apps like CARDIOTRACK, which interprets real-time ECG data, or BeatO, which tracks fluctuations in blood glucose levels, can be leveraged in remote areas where healthcare access is a challenge.



Driving the importance of mental wellness amongst all

Mental wellness requires human interactions with technology. This can be done by introducing conversational therapy bots on AI platforms and using natural language processing to identify emotional undertones in the user context and provide immediate real-time support during stress moments.

A technology-driven future of self-care can be achieved by embracing AI with a human-centric approach that can provide personalized, accessible and anticipatory wellness with optimal health outcomes in an evolving world.

KEY SESSION TAKEAWAYS



Speaker:
Mr. Nicholas Hall

Executive Chairman and
 Creative Solutions
 Director

Global Consumer Healthcare (CHC) Market: 'The Future Resumed – Key Trends and Opportunities'

CHC industry in the post-COVID-19 era:

The post-COVID-19 era was a surprise for the consumer healthcare industry as it took an upturn, surpassing the pre-COVID-19 era growth, as opposed to dampened expectations of performance.

Upside trends: This upward trend after the pandemic can be attributed to many factors. For instance, during the pandemic, consumers became self-sufficient and self-reliant boosting prevention and self-care with a higher focus on prevention than on treatment. They were forced to turn towards Dr. Google to learn how to improve immunity and health. Hence, industry was required to cater to this expanding consumer needs in the self-care segment of building immunity. Now, we see this trend is moving back towards treatment along with protection versus just prevention alone.

KEY SESSION TAKEAWAYS

After the COVID-19 pandemic, the cough-cold-allergy market saw a boost because of resurgence of viral symptoms and infections as people started moving around. During the pandemic, extreme caution was exercised with social distancing, masks and sanitizers, leading to lowered infections and reduced immunity.

Another factor attributing to this boost is the growth in the China OTC market. Globally, it is a considerably larger market than India and of high value interest. Additionally, the number of Chinese tourists to neighbouring countries increased, thus positively impacting domestic economies of neighbours. During COVID-19, the number of Chinese tourists had declined, which negatively affected the domestic economies of Japan, Taiwan, Korea, Australia, New Zealand, etc. For example, the Japanese market had recessed due to decreased China tourism, which accounted for 10% of its domestic consumption.



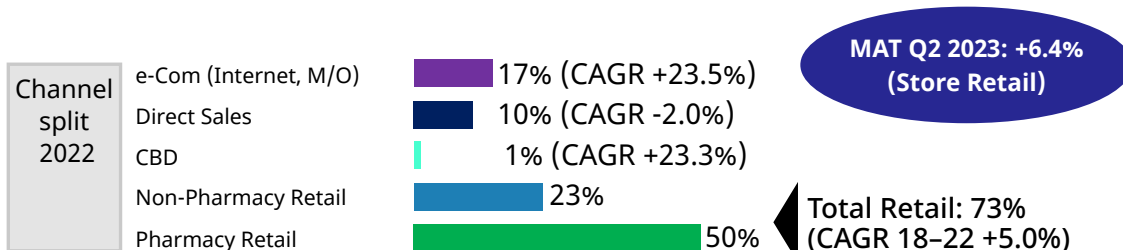
2022 - a year of fluctuating trends: In Europe, the Russian invasion of Ukraine affected international energy prices, causing an economic crisis and inflation, affecting supply chain, etc. Consumers are facing inflation pressures, and hence, there is a general movement towards branded generics, pure generics, and private label products from chain pharmacies and large supermarkets.

OTC market gaining momentum: The OTC market growth was approximately 4%-5% in the pre-pandemic 2019, but it kept growing to a record 8.2% in 2022 after the pandemic (40% contribution due to volume and 60% due to price). The 2023 prognosis seems to indicate a flattened growth mainly driven by price increase, but the yearly outlook seems positive with an expected growth of 6.4%, and a long-term CAGR of 7% (2022-2027).



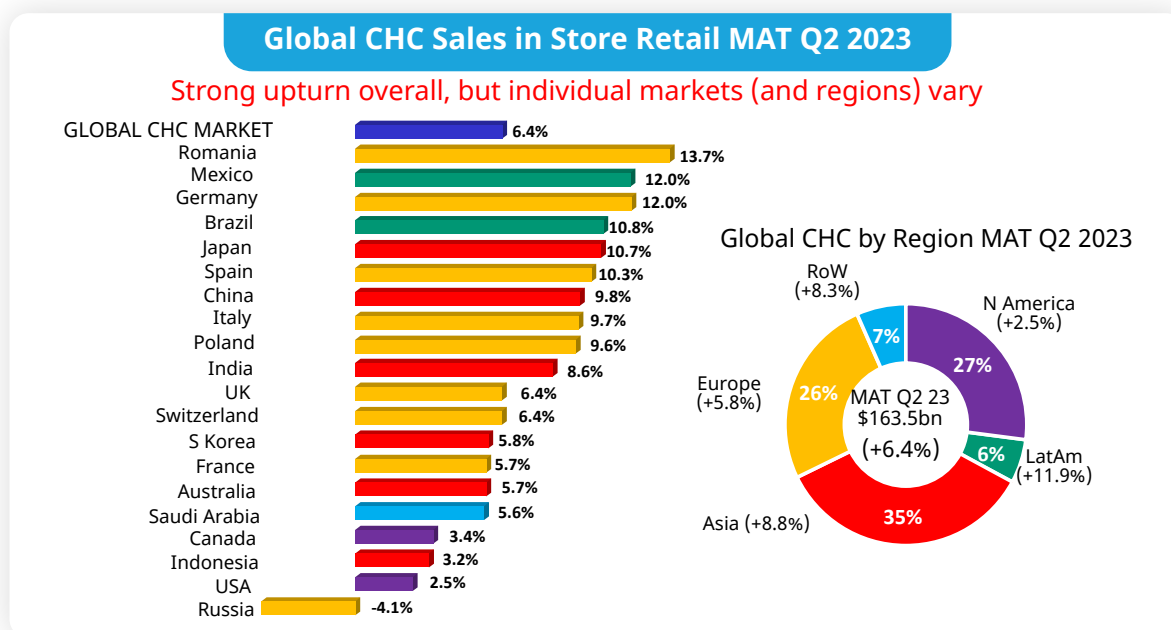
E-commerce has a huge potential globally and accounts for 17% of all sales in the consumer healthcare segment versus 10% of direct sales. E-commerce is forecasted to grow over 30% in the next 10 years with a CAGR of 23.5% versus degrowth of 2% seen in direct sales. E-commerce also contributes to 40%-50% of the health/wellness segment like vitamins, minerals and supplements (VMS) segment for Unilever and Nestle. It is catching up in India and is expected to become parallel to the global growth. Hence, it needs to expand to capture the large and highly engaging consumer pool that is spending more time on internet than ever before.

Major Variations in Channel Size 2022 and Growth



KEY SESSION TAKEAWAYS

The global retail market (shops, retail stores and supermarkets, excluding e-commerce) grew by 6.4% until Q2 2023. Most markets performed well, including India (8.6% growth) and Europe (5.8% growth), except Russia whose growth declined because of sanctions, lack of exports, foreign investments, etc.



During the pandemic, prevention and self-care with immunity-boosting supplements (multi vitamins C, D, etc) were of primary importance, but the focus is shifting towards treatment now. Among prevention, magnesium (11%) and probiotics (8.7%) are still going strong, with probiotics having a strong presence globally. Among the list of WOW Brands (best brands for 2022 compared with the previous 5 years), Dabur Chyawanprash of India ranked 4th (CAGR of 35% for 2018–2022). Lumify by Bausch for the red eye was the fastest growing in USA, followed by Olly, an entrepreneurial brand bought by Unilever. Olly is poised to become a billion-dollar brand and is a multivitamin positioned for millennials and gen-Z, with e-commerce playing a central role in its growth.

Ten steps to heaven - areas of investment to achieve fast growth: The future outlook for CHC will be defined by these 10 fast-growing segments: CBD (pain, sleep, mood, anxiety), mental wellness (highest issue globally after the pandemic), sexual health and fertility, women's health and ageing, sustainability, natural/organic products, food intolerance (high potential of \$10 bn), e-commerce, (AI) and emerging markets.

KEY SESSION TAKEAWAYS

Some thought-provoking leverage points:

01 Emphasize on brand value and differentiation to combat generics

Gain and upscale by launching fewer, bigger, newer products

02

03 Use clinical evidence to back innovations

Expand e-commerce programme (important to leverage)

04

05 Women are an important but under-served market: women comprise 51% of the population, consume 62% of healthcare products and purchase 85%–90% of these products

Affordable yet efficacious products to drive sales over those offering sustainability or environmentally friendly products due to financial constraints. However, after 2–3 years, environment friendly and organic/natural products will be among the top 10 fastest-growing segments

06

KEY SESSION TAKEAWAYS



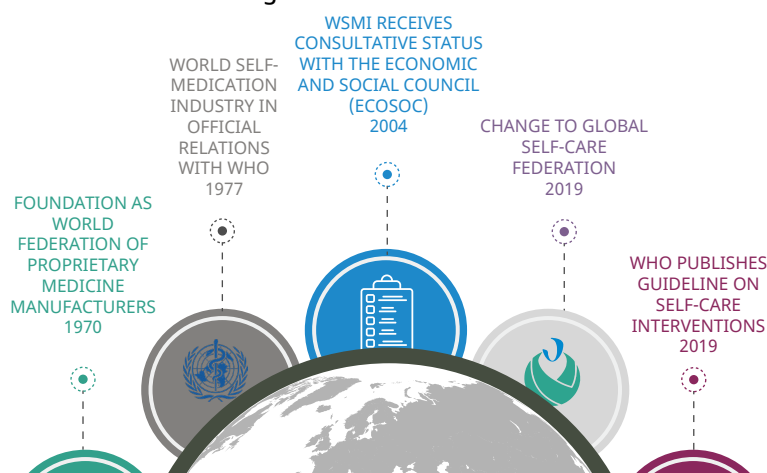
Speaker:
Ms. Judy Stenmark
Director General, GSCF

SCRI - 'India profile, Why a WHO resolution on Self-Care'

Though GSCF was established in 1970 as a self-medicating industry, it became GSCF in 2019 to focus more on self-care versus self-medication. Been with the WHO since 1977, GSCF represents associations and manufacturers in the self-care industry that produce evidence-based products that offer solutions for better health and well-being.

Our History

GSCF's long commitment to better healthcare



KEY SESSION TAKEAWAYS

The WHO definition of self-care: Self-care is the ability of individuals, families and communities to promote health, prevent disease, maintain health and cope with illness and disability with or without the support of a health worker.

Hence, the aim is to get people to become active self-managers with or without healthcare people.

SCRI: This initiative was run in collaboration with the WHO where two SCRI were established, covering 20 countries. Phase 2 was launched in Cape Town with India as a part of it. This would enable better self-care and help in improving health outcomes. Three themes analysed across nine countries: i) Self-care defined in several different ways as meaning differs across sections of people, ii) individual empowerment hinges on continued efforts to boost health literacy, requiring credible and consistent sources of information, iii) self-care legislation is common, but disjointed; numerous government strategies, plans and programmes touch on self-care, but few paint a coherent healthcare policy vision.

India Profile

01

82 mn physician hours can be saved through implementation of self-care practices

02

800 mn individual hours expected to be saved through self-care

03

12 bn productive days can be gained per individual

04

This would lead to approximately 90 bn in welfare gains through current self-care practices

05

3.85 mn spent on HCPs for minor ailments each year

06

If self-care was appropriately used, then this could result in savings of up to 43% for health systems

Recommendations given

01

To have a coherent healthcare policy and regulation for supporting self-care

02

To have accountability and collective action from all stakeholders

03

Health literacy to be recognized as a fundamental catalyst for change

04

Self-care to be understood as a multi faceted and multidimensional concept that includes various health-related practices

KEY SESSION TAKEAWAYS

Call for WHO to adopt the resolution on self-care:

There would be a global savings of \$199 bn if we properly embraced self-care and used healthcare systems. This figure would be higher if more OTC products are available. Governments have been slow in recognizing self-care as integral to health systems and an important contributor; hence, the WHO needs to push for the incorporation of self-care into the national health strategy. Also, awareness about self-care as a concept has grown, but the definition still remains ambiguous.

Thus, a WHO resolution on 'self-care' would be required to embed self-care within policies of countries. The global impact of a WHO resolution would result in improved health outcomes, collaboration and accountability. This resolution would call on member states to recognize self-care; invest in policies; enhance public health literacy and education; implement awareness campaigns; adopt, integrate and scale digital health tools for self-care into healthcare systems, and build HCPs' and social care professionals' capacity on self-care by including it in training modules.

In conclusion, 'self-care' is seen as a crucial component for improving health and well-being for one and all, because it will empower patients and optimize health systems and resources for the achievement of a better UHC.

KEY SESSION TAKEAWAYS

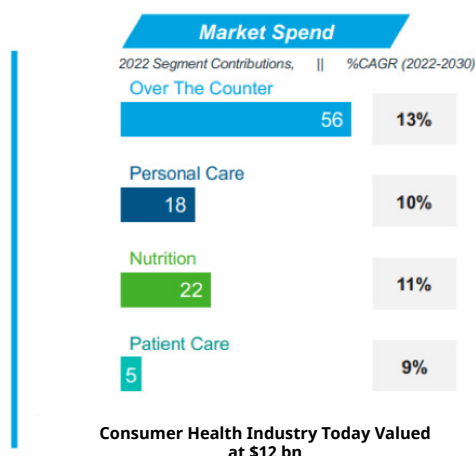


Speaker:
Ms. Tina Khadloya

Sr. Principal, Consumer Health & Patient Services, IQVIA India

CHC Trends in India - 'Thrive and Transform: Propelling Growth in the Indian Consumer Health Market'

Overview of India consumer health: Indian consumer health market stands at \$12 bn and is expected to reach \$32 bn by 2023 (12% CAGR, 2022–2030), which is a growth of 1.8 times that of the global consumer health market (6.5% CAGR).



The consumer health market is split into four sub-segments, with the OTC market (56%) being the largest and fastest contributor at 13% CAGR (2022–2030), Personal Care (18%, CAGR 10%), Nutrition (22%, CAGR 11%) and Patient Care (5%, CAGR 9%). The Indian OTC market is currently ranked 5th at \$7 bn in 2023 and is well-poised to become #3 globally by 2030, demonstrating a sharp increase of 2.7 times to become a 19 bn market.

KEY SESSION TAKEAWAYS

Six key drivers of growth:



Consumer demographics to get diversified (higher disposable income, ageing population), self-medication behaviour on the rise, regulatory environment to become consumer friendly, innovation and micro segments to emerge due to shift from the traditional curative approach to a more holistic one, change in industry dynamics where companies are branching into separate consumer health portfolios and digital expansion driving awareness and access

Consumer dynamics:



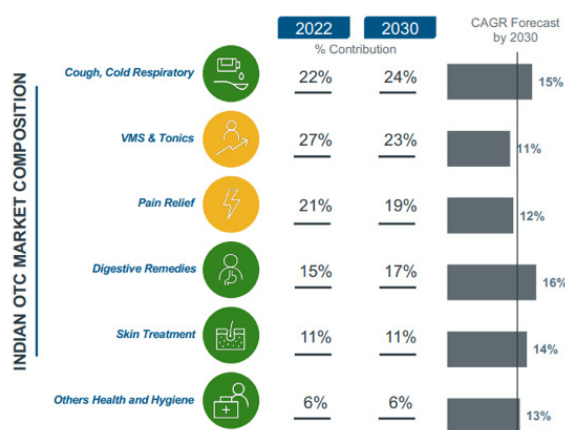
Affluence will increase from 24% to 51% by 2036, with consumers displaying a generally higher focus on self-care. Growing needs of adult and ageing populations will require targeted products such as powdered sunscreen, diabetic supplements and powders, 50+ vitamin supplements, etc

OTC market and innovation:



The OTC market comprises of three major segments, namely 22% respiratory (cough, cold), 27% VMS and 21% pain relief, which are forecasted to grow by a CAGR of 15%–11% by 2030. Approximately Rs. 3,000 crore was added due to self-medicating practices in the last 5 years from these three segments alone: digestives, respiratory and pain. The VMS segment added another Rs. 1,500 crore to this segment

Self-medication for minor ailments such as acidity, cold, cough, hairfall, headaches and indigestion increased from 23% in 2006 to 54% in 2023. Innovative products are proliferating within each category (e.g., supplements for bone health, skin and hair, nail and mental health). Moreover, 60% of new launches that were me-too could not sustain compared with products launched with innovations in ingredients, value proposition, packaging, formats, etc.



KEY SESSION TAKEAWAYS

Increased digital access: There are 690 mn (53%) internet and ~460 mn (35%) social media users who spend on an average of ~7 hours per day online. The evolving digital landscape has increased accessibility to information, healthcare products and services, leading to a subsequent increase in marketing spend by 60% of companies. Overall, 25% consumers researched about self-care products online, 50% turned to social media for health-related information, while another 40% engaged with health companies through social media platforms.

Around 40% consumers today are not only comfortable purchasing their 1st healthcare product online but also prefer online platforms as their primary purchase point. On average, 8.7 social platforms are being used by persons in India versus 3.7 in Japan. Overall, 86% consumers in markets like Varanasi, Vijaywada and Rajkot claimed to use multiple health/wellness apps with the top ones being, Google Fit, HealthifyMe, Practo, Apple Health, Flo, etc.

Consumer health to play a critical role in expanding India's healthcare industry: The consumer health (\$12 bn) segment is expected to reach \$32 bn in 2030 and has created a mark for itself. It has now integrated itself as the 5th arm of the Indian healthcare industry, which previously had only four traditional segments: Healthcare Providers (\$90 bn), Pharma and MedTech (\$38 bn), Academia and Clinical Research (\$6 bn) and Payors and Private Insurance (\$7 bn).

PANEL DISCUSSION OUTCOMES

Panel discussion I: CEO PANEL

How have consumer health companies inculcated a responsible marketing approach?

Participants:



Moderator: Mr. Sandeep Verma, Country Head, Bayer Consumer Health



Mr. Dhawal Katkar, Senior Vice President, Glenmark Consumer Products & Generics



Mr. Shivam Puri, CEO, Cipla Healthcare



Mr. Dinar Mhatre, Sr. Director, Self-Care BU & Professional Strategy, KENVUE (Part of J&J)



Mr. Shri Milind Thatte, Chair, OTC Committee, Managing Director, P&G Health

Responsible marketing approach to create awareness in self-care: It is not very common to adopt self-care in India, and one of the major reasons is lack of knowledge and awareness amongst consumers. Implementing the responsible marketing approach, the industry can create awareness about common ailments or certain conditions, which can further drive adoption. It will create an ecosystem where dependencies on doctors will decrease and the role of pharmacists will increase, which is very important in our country where only 91 doctors are available per lakh population. Some of the methods of responsible marketing discussed are:



Leveraging HCPs to create awareness:

Marketers can reach out to HCPs, experts themselves, for building product equity and educating consumers about the frequency and conditions for using such products. Majority of the OTC products are carrying a legacy of HCP prescriptions at some point in their life, and once prescribed by HCPs, people have adopted those products with repetitive conditions

PANEL DISCUSSION OUTCOMES



Enhance the role of pharmacists to act as advisors to consumers:

Apart from HCPs, pharmacists can play a crucial role in educating consumers on the usage of self-care products. We do not have the community pharmacists' concept in India, but even in pharmacy shops, it is usually the assistant who interacts with consumers instead of the chief pharmacists. So, the role of a pharmacist can be improved in such cases as part of responsible marketing and drive adoption of self-care. For example, a pharmacist can guide consumers to choose between medicated shampoo or a regular FMCG shampoo for a dandruff condition. Because dandruff is a medical condition that can be treated in sometime with a medicated shampoo. Pharmacists can make consumers be aware of such products with details on frequency of its usage, restrictions and when to stop after cure



Right messaging by marketers directly:

Unlike in FMCG, marketers of OTC products cannot stress on continuous adoption with regularly increasing incidence as well as frequency of usage. Incidence in OTC is actually an ailment or medical condition. Even if the product is not meant for a serious ailment, you cannot communicate usage for daily life. Hence, it is very important for marketers to communicate responsibly when to start and when to stop the usage of these medicated products



Position as a better alternative:

Another way to increase adoption could be to provide better alternatives to FMCG with a change in communication. Products like ORS, which sells like a drug for dehydration and diarrhoea, can be positioned as a replacement of sugar-based drinks and can be consumed whenever people are low on energy or feel tired

How can marketers ensure responsible messaging and how should consumers trust them?



First and foremost, would be to have an informed packaging of the product. Product packaging should have a clear message when to start, how much to use, when to stop and under which conditions, they should take a break

PANEL DISCUSSION OUTCOMES

02

Parallely, marketers can leverage digital marketing content such as short videos for educating consumers

03

Using QR codes can be another very effective mechanism that will play a big role in future for increasing education amongst the consumers regarding responsible self-medication

04

Keep a close watch on social media to refrain from the spread of any misinformation about their products. Companies usually have strong internal systems, team of regulators and media policies to ensure that only right and accurate messages reach the consumer. However, there is a strong need to stay ahead of the curve and keep a track of information floating amongst consumers or via influencers on social media to curb the incorrect messaging. Companies are also leveraging doctors on ground who are willing to come upfront and rectify any misinformation being spread on social media



Building trust is a long-term process and it cannot happen overnight. Marketers need to partner with consumers throughout their journey of recovery. Communication should be clear and honest like a friend in need who is there to support throughout the recovery process. Usage of digital mediums for highlighting different ailment conditions under which respective products can be consumed can increase awareness amongst consumers



For example, nicotine replacement therapy products need a long-term adoption before consumers actually quit smoking. So, brands like Nicotex connect with consumers to educate them about the frequency, taste, effects and transition period to initially reduce their frequency so that they finally quit smoking. Once consumers start witnessing results, they start trusting



Similarly, brands like Benadryl are educating consumers about dry cough and wet cough through various digital mechanisms, which is further driving a change in consumer behaviour while purchasing the right products. Interactions with pharmacists is playing a pivotal role in enhancing this education further



Companies are also partnering with consumers at the HCP centres itself to educate them about the health conditions for self-care products. For example, dieticians engage with consumers at a paediatrician centre for educating about the nutritional range of Abbott



Trust is not build overnight. It is a long-term journey. One trusted consumer in any health condition can add 10 times recommendations in the long run for each brand. Hence, only with responsible marketing, one can expect responsible self-care to thrive

PANEL DISCUSSION OUTCOMES



PANEL DISCUSSION OUTCOMES

Panel Discussion II: OTC – An Enabler for Last-Mile Access

Enabling last-mile access to patients: Increasing awareness and access, and addressing the out-of-pocket spending of patients

Participants:



Moderator: Mr. N.K. Ahooja,
Ex-State Drug Controller
Haryana & Chairman of
Government Constituted
OTC Committee



Mr. A.K. Pradhan, Joint Drug
Controller, CDSCO, MoHFW



Prof (Dr.) Arun Garg, Vice
Chancellor MVN University
& General Secretary, IPGA



Mr. Vishal Sachan, Drugs
Inspector, Drugs Control
Department, Govt. of N.C.T.
of Delhi



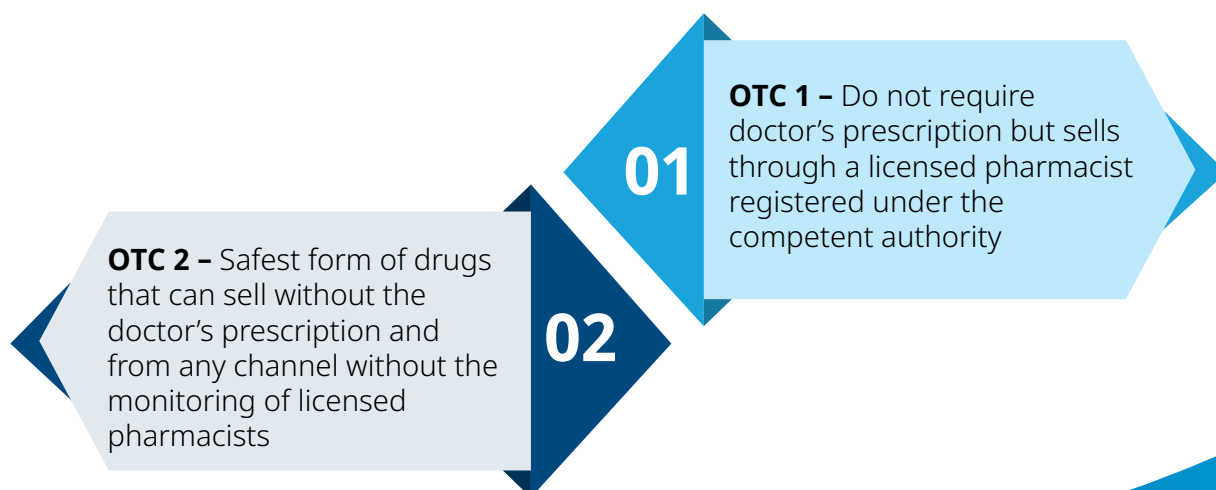
Mr. Amit Duggal, Assistant
Commissioner Drugs, FDA
Punjab



Ms. Martina Gomes, Head,
Reg Affairs - Consumer
Health at Bayer India

Defining self-care and OTC

Every citizen has a right to live a healthy life as per our constitution, and hence, everyone should have the right to their self-care with access to OTC products. While self-care is a larger ecosystem, OTC is a part of it. There are 2 types of OTC products.



PANEL DISCUSSION OUTCOMES

Concerns around OTC regulations

- OTC regulations covers the process of shifting Rx to OTC1 and OTC 1 to OTC 2 along with clear guidelines on advertising of such products by manufacturers. However, defining the entire OTC market under one umbrella is a tough task because of the possibility of side effects of a drug. Hence, an assessment is required at an individual product and molecule level for approving a drug as OTC

- For few drugs, dosage strength differentiates OTC from Rx. For example, when given beyond a particular dose, Paracetamol requires a valid prescription. Hence, drugs are being chosen based on benefits, efficacy, safety and least number of side effects than the others

- However, 16 drugs that are covered under narcotics, steroids and antibiotics cannot be brought under the purview of OTC because of a high probability of misuse and generation of superbugs

- Apart from drug coverage, these regulations cover guidelines for marketing of OTC products, where companies have to clearly mention the conditions, frequency and dosage of the product label itself, so that the consumer can make an informed choice before consuming

- While the regulations are pending for a long time, authorities are being cognizant about the safety of each drug, applicable medical conditions for giving OTC drugs, creating designated authorities for approval of marketing claims and setting up the designated authority for approval of switches

PANEL DISCUSSION OUTCOMES

Need for right education, awareness and empowerment with OTC drugs

Need of OTC education amongst pharmacists:

Pharmacists being the last leg of last-mile connectivity for consumers hold the biggest responsibility of educating consumers. They are trained about the dispensing process of pharma drugs as a part of their education system; however, an advanced module on OTC for selected approved drugs can still be further included as part of their education system itself to empower them with handling of OTC drugs. They can play a pivotal role in educating consumers about the conditions, dosage and restrictions on OTC drugs.

Moreover, it will also reduce the long-standing malpractices such as selling prescription-based drugs without prescription and number of quacks from the healthcare system who are selling life-science products irresponsibly without any formal education.

Need to create awareness amongst consumers:

The government has conducted a lot of awareness campaigns on self-care during COVID-19, which has shown positive results of recovering at home amongst mild-symptom patients. Similar audio, video and social media campaigns can be crafted for selected approved OTC drugs to create awareness on their efficacy and usage.

Industry learnings from global markets and expectations from regulators

The industry submitted the OTC framework in 2018 after taking cues from global countries like the US, UK, Australia, Japan, Brazil, Indonesia and Mexico, which are assumed to have best-in-class OTC norms in the world. While the first four countries are well-developed advanced economies, India can closely relate to medical conditions in Indonesia, Brazil and Mexico. Brazil's regulations were implemented in phases by their medical authorities where they understood the scenario around self-care and population and introduced pieces of regulations in tranches. They have also developed some best regulations for OTC switches.

The industry is willing to further enhance that framework by adding learnings from additional markets like Thailand and Malaysia. However, the industry is certainly expecting faster execution from regulators on approval of the earlier submitted draft notification on 16 molecules and clearance of the pending DMRO notification since pre-COVID-19 days for removing fever as a condition.

Benefits of defining OTC guidelines are multi-fold for our nation because it can create a win-win ecosystem for all stakeholders; reduce burden on current healthcare systems; reduce time and cost of consumers and improve productivity of doctors with critical conditions.

PANEL DISCUSSION OUTCOMES



PANEL DISCUSSION OUTCOMES

Panel III: Decoding the Digital Consumer

Participants:



Moderator: Mr. Dhawal Katkar, Senior Vice President, Glenmark Consumer Products & Generics



Mr. Supratik Sengupta, Head of Marketing, Lupin - Consumer Health (OTC). Deep experience in Consumer Marketing & Brand Strategy - OTC/FMCG



Mr. Abhiroop Chatterjee, Director - Marketing, Cipla Health Ltd



Mr. Gaurav Karkhanis, General Manager - Head of Marketing, Glenmark Pharmaceuticals



Mr. Suraja Kishore, CEO-BBDO & TeamX for Mercedes-Benz, India

In the last few years, what evolved into a prominent self-care business from the digital ecosystem?

OTC is an enabler for the 'self-care' environment to flourish, and the digital world plays a critical role for OTC by disseminating 24x7 knowledge to consumers. Pharmacists serve a crucial role in the OTC environment by providing solutions to consumers, but somewhere profitability remains an objective for pharmacists. OTC does not need Rx but needs both, pharmacists and knowledge, which can come via advertisement and marketing as well. Hence, digital can pave the way to help marketers impart relevant and credible knowledge to the end-user in a responsible manner.

How are teams leveraging digital opportunity to connect, engage or build brands?

Consumers (offline/online) are looking for solutions to their varied problems. There is a lot of clutter on information and advice via people and media channels; hence, people have to cut through this noise to get to credible and authentic information. Currently, information is scattered and scarce, and when looking for solutions, people want empathy too due the personal nature of their problems. For example, when Cipla came up with Nicotex patches to help smokers quit, they partnered with the smokers to understand their emotional journey.

PANEL DISCUSSION OUTCOMES

This helped them customize their chatbot feature to respond to most consumer queries related to emotional well-being along with the establishment of a call centre for the same. Patches are a new format in India, and hence, using the digital platform through this personalization approach to educate and connect with consumers got them 5.5 lakh traffic within their 1st quarter itself. This scenario developed into a case study for them as well.

Is digital advertising/marketing cost-effective? How do you measure return of investment (ROI) in campaigns on digital investments? Digital platforms: Google, Amazon, Meta, Instagram, YouTube, etc.

Expense of advertisement depends on the stage of the lifecycle of the brand (e.g., Candid in the anti fungal space is a well-established brand; hence, ROI here translates to increasing the reach versus creating awareness among the public). For example, TV advertisements resulted in plateaued sales of Candid in certain cities, giving no ROI. To combat this, specific and popular YouTube channels were identified along with digital analytics and used for those locations. E-commerce platforms like Amazon can be expensive for newer launches due to competition from established firms with deeper pockets.

Have you done any such innovations in Tier 2/3 markets using digital platforms?

In another example, local and popular digital platforms were used to drive innovations and uptake. For example, using digital channels like 'TheLallantop', a very prominent channel, to advertise Candid in Tier 2/3 cities. It was a Hindi-led content channel with more than 3.5 mn viewership. Thus, using this channel versus other TV channels not only made advertising cost-effective but also resulted in higher viewership and engagement.

The second example is of Scalpe: Google trend searches revealed around **1.34 crore**, searches for the word 'dandruff' in India and another **50 lakh** searches for the molecule 'ketoconazole'. So, the marketing team used these key words to bid for Scalpe to gain visibility and got **~30 lakh hits for its products within a few months**. This was also cost-effective and not heavy on the budget.

Thus, it is important to understand that consumers can be tapped in a smarter and innovative manner to maximize ROI while being cost-effective, as they are, in general, actively searching for brands and categories online.

PANEL DISCUSSION OUTCOMES

Changes in consumers in terms of adoption of digital in India. Challenges faced by pharma companies to help navigate this shift to consumer products.

As a rule of thumb, people want a better life, but not necessarily a better brand. When we say consumers, we automatically think about a 'you' versus an 'us' – this dehumanises the person. So instead of ROI, the thought process should be focused towards return on empathy (ROE). Digital is an infrastructure; hence, it is not the best possible way of connecting on the emotional front. There is a deluge of content on Netflix, Youtube, etc, which leads to confusion for consumers on what to watch. The biggest challenge for brands is to be insightful, have deeper connects and listen to consumers. We should mine data to get rich insights to answer these problems. OTC brands are obsessed with efficacy, which leads to indifference in consumers, thus lowering the emotional connect and penetration. Brands must first try to win trust and empathy to capture consumers on efficacy. This would subsequently translate to higher sales via increased penetration and expansion.

1-2 Examples of shifting from an efficacy-obsessed world to winning trust:

Example

Since Google happened, doctors' opinions have taken the 2nd spot. While using efficacy as an area of promotion, fake doctor in advertisements is not an effective way to garner trust. A case in point is the "Sensodyne campaign" where the advertisements empathise with the person having pain instead of focusing on the efficacy of the product. This helps audience to create an emotional connection and deepens trust which in turn increases market expansion and penetration. Another example for building trust, would be to have a toll-free number to help respond to consumer concerns.



PANEL DISCUSSION OUTCOMES

Panel discussion IV: Pharmacists as Responsible Advisors for Self-Care

Participants:



Moderator: Ms. Manjiri Gharat,
Vice President & Chairperson,
Community Pharmacy Division,
IPA



Mr. Ulhas Joshi, Director at
Stratex Enterprises



Mr. Sreeram Venkitaraman,
Officer & Director, GoApptiv
Private Limited



Ms. Sreedevi Yellmarazu,
Manager Consumer
Insights, Bayer Consumer
Health



Professor. Sayeed Ahmad,
Director of Centre of
Excellence Unani Medicines,
at Jamia Hamdard



Ms. Usha Chennuru, Medical
Director, Cipla Health Ltd



Dr. Hemant Koshia,
Commissioner at FDCA,
Gujarat



Summary of panel discussion

Some of the biggest challenges in successful adoption of self-care in the Indian market are irrational use of self-medication in smaller markets, limited understanding of consumers about appropriate treatment options available to them and lack of understanding on drug interactions. The industry today recognizes that key stakeholders to help address these challenges are our local and chain pharmacists, opening tremendous opportunities for pharmacy graduates to become public health professionals and responsible self-care advisors.

This leads the discussion about community pharmacists to centre around two main aspects:

PANEL DISCUSSION OUTCOMES

Underutilization and empowerment:



Community pharmacists, being the primary point of contact for consumers in healthcare, have a significant opportunity to influence patient behaviour. However, they are currently underutilized, particularly in self-care. There is a need to empower pharmacists to act as advisors by potentially implementing regulatory interventions that enhance their role, ensuring they are equipped to provide accurate guidance on self-care and medication usage, and be able to advise on the right point of expert intervention.

Education and integration:



To ensure the last-mile delivery of responsible self-care, there is a need for upskilling these professionals, including a need for additional training in various aspects such as formulation knowledge and best practices. Integrating enhanced syllabi in pharmacy courses, focusing on OTC roles, disease symptoms, drug interactions and self-care practices, would improve their credibility and ability to offer responsible advice. Utilizing QR codes and digital technology could further assist in disseminating information and ensuring consumer awareness, even when a pharmacist is not immediately available.

The core issue revolves around the underutilization of pharmacists' potential and the necessity to both educate and empower them, while leveraging technology to enhance consumer knowledge and connectivity.

PANEL DISCUSSION OUTCOMES



CONSUMER HEALTH AWARDS

Jury Members



Dr. Shailesh Ayyangar

Value Accelerator, Secret Advisor at Goldman Sachs Asset Management Healthcare



Mr. Vikrant Shrotriya

Corporate Vice President and Managing Director, Novo Nordisk India



Mr. Suraja Kishore

CEO BBDO and Team X for Mercedes Benz, India



Ms. Monika Gangwani

Executive Director India, Advisory Services, Eversana



Ms. Susan Josi

Independent Healthcare Consultant

Category 1: Consumer Health Brand of the Year 2023



Category 2: Consumer Health Digital Campaign of the Year 2023



VOTE OF THANKS



Mr. Suresh Pattathil

President OPPI and
 Managing Director &
 General Manager,
 AbbVie India

Mr. Pattathil thanked the dignitaries for sharing their thoughts on what OTC and self-care is about and the current need for regulatory reforms in the country.

Some challenges for India:

- 01 India is 16% of the world population but has 20% of the disease burden
- 02 75% of our healthcare infrastructure is sitting in 25% of the urban centres. So, we need to address the challenge of access to healthcare for the lower Tier cities and explore usage of digital interventions
- 03 For most of the non-communicable diseases, access to medicines is the bigger issue than price

Hence, there is a need for reforms around OTC and to the Drugs and Magic Remedies Act to enable us to improve healthcare access and consumer awareness. A request to the government is to make a start in this direction.

OPPI – FICCI – PHD are working together towards the objective of 'Swasthya Uday, Antyodaya' – last-mile access to patients. OPPI's initiative is in line with their efforts on working towards facilitating the government in developing the OTC and self-care framework and adopting a collaborative approach to building a responsible self-care practice in India.

He concluded with a vote of thanks to the conference partners and the delegates attending the conference for their support and participation.

PANEL DISCUSSION OUTCOMES

Conference outcomes defining way forward for the industry

The conference ended with clear action points for all key stakeholders, responsible for fostering consumer health:

Government and Regulatory Bodies:

- 01 Release the existing draft OTC policy and continue to build on it with support from industry, experts and consumers
- 02 Build rigour on the formulation of a comprehensive healthcare policy and regulatory framework that supports and encourages self-care practices
- 03 Set forth the Rx-OTC Switch policy and extend the ailment/molecule classes, building on the best practices adopted by global markets
- 04 Collaborate with industry experts and organizations to develop clear guidelines and standards for self-care products
- 05 Consider reforms to the Drugs and Magic Remedies Act to align with evolving self-care needs
- 06 Support initiatives that enhance health literacy through public awareness campaigns
- 07 Advocate for the adoption and implementation of a WHO resolution on self-care

PANEL DISCUSSION OUTCOMES

Consumer Health Industry:

- 01 Innovate responsibly by investing in research and development to create evidence-based self-care products
- 02 Collaborate with healthcare professionals to enhance the role of pharmacists and healthcare providers in consumer education
- 03 Develop and adhere to responsible marketing practices, ensuring clear communication on product usage and limitations
- 04 Leverage digital platforms for targeted marketing, education and consumer engagement

Consumer Health Industry:

- 01 Integrate self-care education into pharmacy and HCP curricula, offering specialized training programmes focusing on OTC roles, disease symptoms and responsible self-care practices
- 02 Advocate for an enhanced role in self-care education and advisory services
- 03 Participate in training programmes to stay updated on the latest self-care practices and products
- 04 Collaborate with industry representatives to provide accurate information and guidance to consumers
- 05 Utilize digital platforms to share health-related information responsibly

PANEL DISCUSSION OUTCOMES

Technology and Digital Platforms:

- 01** Develop user-friendly, evidence-based health applications for consumers to access reliable self-care information
- 02** Collaborate with healthcare organizations to integrate digital health tools into existing healthcare systems
- 03** Ensure the responsible use of technology by monitoring and curbing the spread of misinformation on digital platforms
- 04** Invest in research to understand and cater to evolving consumer needs in the digital space

These action points aim to create a collaborative and supportive environment for the promotion of self-care, addressing the various aspects discussed in the session.

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Conference 2023