Changing Indian Market Trends of NMP: A Review

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ABSTRACT
Progesterone is an essential hormone in the process of reproduction. The pharmacokinetics and pharmacodynamics of progesterone have been well studied. Progesterone can be administered Orally, Vaginally or Intra Muscular Injections (IM). Market trend & Prescription analysis data shows that nowadays Doctors are prescribing Oral Micronised Progesterone Therapy to every pregnant woman. Today, women are active, successfully managing their personal & professional lives as a result of which Conceptions & thus Pregnancies are happening either in late 20’s or early 30’s; certain cases are of even late 30’s. Henceforth, Pregnancies are considered precious as couples do not want to take chance to compromise in any manner & thus Progesterone, an essential hormone in Pregnancy is being prescribed to a large extent. One of the concerns regarding Progesterone therapy is the way in which the hormone is to be administered; this topic is currently changing the market trend of Oral Natural Micronised Progesterone Capsules to Oral Natural Micronised Progesterone Sustained Release Tablets. There are various problems reported with Conventional Oral NMP Softules like Sedation, Dizziness. Moreover, Patient resistance is also observed as Oral NMP Softules are to be taken twice or thrice daily. During Pregnancy, in general, patient is under Poly therapy (taking Calcium, Iron, Vitamin B Complex, Other Supplements etc.) & taking NMP Softules is an additional burden.

Keywords: NMP, NMP Market Trends, Progesterone, Capsules, Hormones

Received 27 Jan 2015  Received in revised form 12 Feb 2015  Accepted 14 Feb 2015

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INTRODUCTION
Progesterone appears to be necessary to support an early pregnancy, and it has been used for this purpose for several decades. Its potential role in women with recurrent miscarriage due to luteal phase deficiency has been suggested [1]. Progesterone is an endogenous steroid hormone involved in the menstrual cycle, pregnancy, and embryogenesis of humans and other species. It belongs to a group of steroid hormones called the progestogens [2]. The main sites of progesterone biosynthesis are the ovaries and the adrenal cortices [3]. Progestational agents have many important functions, including regulation of the menstrual cycle, treatment of dysfunctional uterine bleeding, prevention of endometrial cancer and hyperplastic precursor lesions, and contraception. Progesterone controls the estrogen-primed endometrial glands by decreasing the number of estrogen receptors, thus preventing endometrial cancer. Progesterone also regulates mitosis in fully differentiated endometrial cells [4]. Just like other products, Progesterone too, has not been aloof of various marketing strategies, gimmicks & various tactical plans. There are various market factors that are driving Progesterone Market. Progesterone can be divided into several types. Besides the Natural Progesterone, there are different classes of Synthetic Progestins that are being marketed in India like Dydrogesterone, Allylestrenol and Norethisterone etc. Progesterone is an essential hormone in the process of reproduction. Although the pharmacokinetics and pharmacodynamics of progesterone have been well studied, its use in the pathophysiology of pregnancy
remains controversial. One of these concerns is the way in which the hormone is administered [5]. Micronized Natural Progesterone is available for oral administration, has better bioavailability and fewer side effects than natural progesterone, and is convenient to administer. Therefore, Micronized Natural Progesterone appears to be a safe and effective alternative to synthetic and natural progesterone formulations for variety of clinical and research applications [6]. Patient information regarding Progesterone in Pregnancy is available on websites like WebMD, pregnancy.about.com. Not even a single prescription of Pregnancy is seen without Progesterone. Natural Micronised Progesterone market in India stands at 375 Cr & currently growing by 3% [7]. NMP market gives patient the option right from Oral Tablets, Softules, Injections, Vaginal Tablets, Gels, Ointments & recent addition are Sustained Release Tablets. There are around currently 70 brands of NMP as per Indian Market Audit Data. Oral NMP is available in various strengths like 100 / 200 / 300 / 400mg. The leading brand is Susten (being marketed by Sun Pharma) which stands at 43.13 Cr [7]. It is said that Innovation is an important aspect for successful marketing. Innovation is a necessary strategy for growth & after reaching a huge figure of 375 Cr, to infuse growth spree & to protect the cannibalization from Synthetic Progesterone players (e.g. Dydrogesterone brands like Duphaston) few major NMP players thought of increasing the base by increasing the new users, more occasions of use by Consumers & to revamp present NMP molecule.

For the last few years specifically between August 2012 till now, there has been a sudden change. Chart 1 depicts the decline in sale of NMP Softules.

![Figure 1: Unit wise sales of NMP Softules (Source: AICOD Pharma Softech) [7]](image)

De-growth in NMP Softules market has increased month by month. In order to arrest the brand de-growth & to revitalize the present NMP Softules market, Alembic Pharmaceuticals introduced Gestofit SR (Sustained Release) (in different strengths of 200, 300 & 400) in August 2012 & this introduction infused growth in NMP market & resulted initiation of de-growth of NMP Softules & heavy growth of NMP SR Tablets market. NMP Softules Brand leader Susten also followed similar footsteps & launched Susten SR in July 2013. For almost 2 years, Gestofit SR maintained its monopoly & in June 2014 Susten SR crossed the sales of Gestofit SR. With growing trends of NMP SR Brands, De-growth of conventional NMP Softules market began. Figure 1 depicts the monthly Units Sale trends. Figure 2 depicts the strange pick up of total NMP SR Tablets market.
CONCLUSION
Drs. have accepted NMP SR formulation & getting converted to them over NMP Softules. Companies are emphasizing the point of Once Daily Dose advantage as NMP Softules have to be taken twice or thrice a day leading to more hassle in a pregnant women life. Moreover the prescribe base of NMP Softules is still high but shrinking rapidly ultimately getting transferred to NMP SR. Sustained release natural progesterone produced serum concentrations of progesterone in the luteal phase range. The average elimination half-life of the 300mg preparation was 18 hours supporting once daily dosing [8]. What is more exciting to wait & watch is the extent to which NMP SR market grows & what can be newer formulation that can prove more superior over NMP SR Tablet market.

REFERENCES