Availability and Market Penetration Study of SMC Products 2007

Report

Prepared for:

SOCIAL MARKETING COMPANY

Submitted by:
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July, 2007

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Md. Monirul Islam
Executive Director
Pathway

GLOSSARY

AIDS	Acquired Immune Deficiency Syndrome
BAP	Bangladesh Aids Program
BDHS	Bangladesh Demographic and Health Survey
BRAC	Bangladesh Rural Advancement Committee
CYP	Couple year Protection
FI	Field Investigator
GOB	Government of Bangladesh
HIV	Human Immune Deficiency Virus
MFP	Mobile Film program
NGO	Non-government Organization
OCP	Oral Contraceptive Pill
ORS	Oral Rehydration Saline
ORT	Oral Rehydration Therapy
QCO	Quality Control Officer
SMC	Social Marketing Company
SO	Sales Officer
STD	Sexually Transmitted Disease
STI	Sexually Transmitted Infection
TV	Television
USAID	United States Agency for International Development

CONTENTS

EXECUTIVE SUMMARY

For more than past thirty years Social Marketing Company (SMC) has been marketing different reproductive health and child health products in order to improve the quality of health. SMC has been conducting Market Penetration Studies at regular intervals since 1998 as part of its efforts to understand the market of its own products (OCP, Condom and ORS) more intensely and also to know more about its competitors, old and new ones.

The prime objective of this Study was to assess the product availability and market penetration status of SMC as well as competitors' products (OCP, Condom and ORS) all over the country, which will help SMC to strengthen their sales and marketing strategies for FY-2008. Total sample for the study was 7200 outlets, where 2400 were pharmacy and 4800 were non-pharmacy. Study also has taken same proportion of urban and rural sample from both types of outlet. Finally, 600 samples have been covered from each SMC sales areas.

Face-to-face interview has been conducted with pharmacy and non-pharmacy sales man/owners. In addition, observation technique has applied to assess the feasibility of promotional materials.

FINDINGS OF THE STUDY

Availability of Oral Pill: Nordette 28 was the highest available oral pill brand (75%) in the pharmacies combined all areas followed by Femicon (68%), Ovostat Gold (47%), Minicon (38%) and Marvelon (33%). Availability of minor competitors brands such as Ovastat are 3.9%, Shukhi are less than 1% and other 14 brands are less than 3%. Study showed that most of the metro (89%), urban (85%) and rural pharmacies (82%) had at least one OCP of SMC brand at the time of survey. Availability of oral pills in the non-pharmacies was only 5% nationally with higher proportion in rural (6%) than urban (4%) and they were mostly SMC brands.

Availability of Condom: Panther was the highest available brand in the pharmacies (67%) closely followed by Sensation Classic (51%). The other available brands of Condom were Sensation Strawberry (21%), Hero (20%), U&ME Long Love (18%), Sensation Mint (18%) and U&ME Anatomic (13%). The survey recorded 82 Non-SMC commercial condom brands and some of them were found in the market in high proportion especially in Metro and urban areas. Some of these brands are Green Love Dotted (7%), Titanic (6%), Green Love Super (5%), Freedom (5%) and Care (5%). However, study finding indicated that Raja were available only in 1% of pharmacies. Availability of Condom is quite lower in non-pharmacy outlet as compared to pharmacy. Nationally, 14% of the non-pharmacies kept Hero, 9% kept Panther, 3% kept Sensation Classic and only 2.8% kept Raja.

Availability of ORS: ORSaline-N brand of SMC was the single major brand available in 89% of the pharmacies followed by Tasty Saline Universal (46%), ORSaline Fruity (37%), Neo Saline (21%) and Rice-GSS (17%). In addition, Oral Saline Universal, BRAC Saline and Saline-R were available around 10% of pharmacies each. ORSaline-N was found to be the single major ORS brand in the non-pharmacies. In 42% of all non-pharmaceutical outlets (metro 51%, urban 48% and rural 36%) ORSaline-N was available during survey period.

Availability of SMC Brands at Pharmacy Outlets by the Frequency of SOs Visit: The positive co-relationship between the lesser frequency of visit and lesser availability is strongly evident in urban outlets. Relatively higher availability of SMC brands with no scheduled SO visit or never visit at all in both urban and rural pharmacies is probably a result of the retailers' independent decision to self -supply to meet client demand.

Average Current Stock Level of SMC Brands: The average current stock level of Femicon, Nordate-28 and Minicon were 32, 20 and 14 cycles respectively at pharmacy outlets whereas average stock levels of these pills were respectively 20, 15 and 15 cycles at non-pharmacy outlets. The average current stock level of Hero (urban: 75 and rural: 56 pieces) and Panther (urban: 38 and rural: 28 packets) are quite higher as compared to other brands at pharmacy outlets. On the other hand, at non-pharmacy outlets the average highest stock level of condom was Hero (urban: 75 and rural: 94 pieces) followed by Sensation Classic (urban: 25 and rural: 18 packets) and Panther (urban: 22 and rural: 19 packets). The average current stock level of ORSaline-N was 160 and 63 sachets at pharmacy and non-pharmacy outlets respectively. Similarly, average current stock level of ORSaline Fruity was 56 and 33 sachet respectively at pharmacy and non-pharmacy outlets.

Current Purchasing and Selling Price: All brands of SMC were found to be selling at MRP or very close except Femicon and Raja (though currently discontinued). The mean selling price of Femicon was Tk. 13.78. Raja is a non-pharmacy brand and the survey showed that purchased price ranged between 40-60 paisa per piece and about 81% outlets sold Raja at the price of Tk. 1.00 and 12 % sold at more than Tk. 1.00.

Ways to Replenish SMC Brands When Exhausted: Overall, half of the respondents of the pharmacy and one-third of the non-pharmacy outlets reported that they buy the products from the nearby shop/market when exhausted. About one-fourth of the respondents of the pharmacy and non-pharmacy each reported that they waited for SMC sales persons to visit.

Stock Out During Last Six Months: More than three-fourth of the pharmacy experienced stock out during last six months preceding the survey. Similarly, four out of ten non-pharmacy outlets also experienced stock out of SMC products.

Frequency of Visit by the SO: More than one-fifth of the pharmacy respondents reported that SOs met once in a week, 14% met once in a fortnight, 8% met once in a month, 41% reported that they did not follow any schedule and 10% mentioned that the sales officer never visited them. On the other hand, 12% of the non-pharmacy respondents mentioned that the SOs visited within a month, 23% mentioned that the SOs did not follow any schedule and majority (63%) reported that the SOs never visited to them.

Training Received: Fifty six percent of the pharmacy providers reported that they have received training organized by the SMC. There is no noticeable regional variation on ever attending at SMC training program. Those who have attended, among them 60% attended once, 27% attended twice and rest attended thrice.

Ways Proposed by the Respondents to Ensure Better Supply of SMC Products: One fifth of the pharmacy outlets and about one third of the non-pharmacy outlets are satisfied with the current distribution system of SMC. When asked about their suggestions with regard to improvement of supply situation, they opined to increase the number of sales people in the current system, to add third party distributors to the current system and to increase the frequency of visit of the SOs.

The Penetration Study 2007 for SMC has revealed such salient findings as with regard to the availability of SMC products vis-à-vis competitive products in all pharmacy and non-pharmacy outlets nationally, current stock levels, frequency of stock outs, correlation between SMC SO visit and availability of products, competitors' reaction on trade incentives and the visibility of SMC products and promotional items. The study also covered the retailers' preference on the suitable distribution modules with a view to improving consistent and satisfactory availability of SMC products. The study findings should be valuable for SMC to assess the current distribution strength of the company and devise strategies to address gaps and weaknesses in order to improve sales performance.

The study has found 90 brands of ORS in the market as compared to 31 in 2003 and 87 brands of condoms compared to 46. In the face of increasing completion especially in the mentioned categories, SMC should give special focus in increasing penetration of its products in rural markets and urban pockets. Special focus should be given on condom and ORS penetration into non- pharma outlets.

Product visibility at outlets was found satisfactory. However, the visibility of promotional items in the outlets for SMC products is poor. Merchandising efforts should be intensified to increase visibility.

Chapter-One

INTRODUCTION TO THE STUDY

1.1 Introduction

Social Marketing Company (SMC) is interested to assess the availability and penetration of SMC products (OCP, Condom and ORS) as well as its competitor brands all over the country. In this connection, SMC has been conducting Market Penetration Studies at regular intervals since 1998 as part of its efforts to understand the market of its own products (OCP, Condom and ORS) more intensely and also to know more about its competitors, old and new ones. This is the 4th in the row conducted by Pathway during the 2nd quarter of 2007. The first two chapters describe the background, methodology and implementation details and the third-fifth chapter presents the findings with data and diagrams. The findings of the study will be used to identify strengths and weakness based on product penetration of each SMC areas in order to devise new distribution strategies and thereby improve sales performance.

1.2 Objectives of the Study

The prime objective of the study is to assess the product availability and market penetration status of SMC as well as competitors' products (OCP, Condom and ORS) all over the country, which will help SMC to strengthen their sales and marketing strategies for FY-2008.

The study has calculated independent estimates of the study variables for pharmacy and non-pharmacy outlets and broken down into metro, urban and rural areas targeted at the national and sales area level.

1.3 Information Coverage

Following has been the information coverage for the study:

Availability and Stock Levels of Products (SMC and Competitors)

- Oral pill;
- Condom; and
- ORS

Supply Situation

- Last purchase of SMC as well major competitors brands (what, when, how much and source);
- Indirect purchase beyond SMC sales officers (outlet, frequency, location and distance); and
- Frequency and duration of stock out during last 6 months

Performance of Sales Officer (SO)

- Visits by SO to the outlets (ever visit, last visit, schedule of visit, frequency)
- Recall of SMC Sales Officers' name;

Promotional Activities

- Ever attended in the SMC training program (pharmacies only);
- Visibility of SMC dispensers, stickers, dangler, calendar, etc (observation).

Pricing

- Last purchase price of SMC products/competitive products
- The retailers charging price for each of the SMC products/competitive products

1.4 Products and Marketing of SMC

The Social Marketing Company (SMC), with funding assistance from USAID under the NIPHP, has been significantly contributing to the overall success of national reproductive and child health program. In 2006, SMC provided 3.89 million CYP through offering three modern methods - oral pills, condoms and injectable. As Bangladesh Demographic and Health Survey (BDHS) 2004 shows, 30 percent of the modern contraceptive users reported that they use SMC brand contraceptives. SMC is significantly contributing in effective diarrheal management program as well. SMC sold 145 million sachets of ORS during FY 2006 having more than 55 percent of the total retail market of the country. Presently, SMC recovers more than 100% of its operating and nearly 67% of the total costs (including products).

The major programs SMC implement includes maternal health, child health and STD/AIDS Prevention Program- Shurockkha. The major support programs that SMC implements include Customer Education Program, Health Communication Program and Social Franchising Blue Star Program.

SMC's current product line includes eight condom brands (Raja, Hero, Panther, Sensation Classic, Sensation Mint, Sensation Strawberry, U&ME Long Love and U&ME Anatomic), three oral contraceptive pills (Nordette-28, Femicon & Minicon), Injectable contraceptive - SOMA-JECT and three packaged ORS (ORSaline-N, ORSaline Fruity with Mango Flavor and ORSaline Fruity with Orange Flavor). Since inception, SMC has sold approximately 2.7 billion condoms, 250 million cycles of pills, and 724 million sachets of ORSaline. SMC has a very efficient nation-wide sales and distribution network that operates through strategically located twelve sales offices. The Company has a little over 100 sales personnel who are distributing products to more than 225,000 retail outlets countrywide.

SMC enhances the capacity of the private medical practitioners to offer clinical contraceptive method (injectable) through its Blue Star Program. It works through a network of 3600 private medical practitioners as a new channel for marketing the clinical contraceptive (currently Injectable) with high quality of service-delivery.

SMC implements Health Providers Training Program through which knowledge and skill of private sector health providers including drug sellers and rural medical practitioners are strengthened in order to better over-the-counter services including counseling.

SMC addresses the issue of reduction of the transmission of STD & HIV/AIDS among the defined high-risk populations through its "Shurockkha" program, which is currently being implemented under Bangladesh AIDS Program (BAP).

Mobile Film Program (MFP) is considered as one of the important strategies to reach the rural population. The objective of operating MFP is to educate people on health issues through enter-education films. The program includes messages on family planning, child and maternal health, diarrhea management, HIV/AIDS prevention and other social priority issues like anti-trafficking and education.

1.5 Product Distribution

SMC has one of the most established, extensive and efficient distribution networks in Bangladesh. Nationwide coverage is carried out through nine Area Offices and three Depot Offices located in major district towns of the country. This enables SMC's 85 men-strong sales force to distribute products to the far-flung outlet promptly and regularly. On an average, about 225,000 outlets are served by SMC sales force each year of which approximately 35% are pharmacies and the rest are non-pharmacies. In addition, numerous other retailers take supplies from the stockiest.

1.6 Districts and Outlets Covered by the SOs During Past One Year

The prime focus of the study has been to evaluate the performance of the 12 area offices in terms of quantity and quality of sales. It is therefore relevant to take note of the following secondary data from the MIS maintained in SMC as regards coverage of districts and outlets and the distribution of the 85 Sales Officers. The following table shows the district-wise distribution coverage by each SMC Sales Office.

Table 1.1: Districts Covered by 12 Area Offices of SMC

Name of Area Offices	District Covered
Barisal	Barisal, Pirojpur, Patuakhali, Bhola, Barguna, Jhalakati Gopalganj, Madaripur and Sariatpur
Bogra	Bogra, Joypurhat, Sirajgonj, Gaibandha and Naogaon
Chittagong	Chittagong, Khagrachari, Bandharban, Rangamati and Cox's Bazar
Comilla	Comilla, Chandpur, Feni, Noakhali and Laxmipur
Dhaka East	Dhaka part, Narayangonj, Narsingdi, Munshigonj,
Dhaka West	Dhaka part, Manikgonj, Gazipur and Tangail
Khulna	Khulna, Bagerhat, Satkhira, Jessore and Narail
Kushtia	Kushtia, Chuadanga, Maherpur, Jhenaidah, Magura, Rajbari and Faridpur
Mymensingh	Mymensingh, Kishoregonj, Sherpur,Netrokona and Jamalpur
Rangpur	Rangpur, Kurigram, Lalmonirhat, Nilphamari, Panchaghar, Thakurgaon, and Dinajpur.
Rajshahi	Rajshahi, Natore, Pabna and Chapainawgonj
Sylhet	Sylhet, Moulavibazat, Hobigonj, Sunamgonj and B.Baria,

During the last financial year (October 2005 to September 2006) SMC sales forces visited the following outlets by region:

Table 1.2: Districts Covered by 12 Area Offices of SMC and Outlet Covered in the Past One Year

Area Sales Offices	Pharmacy		Non-Pharmacy		Total
	Urban	Rural	Urban	Rural	
Barisal	1396	5164	2432	12513	21505
Bogra	1048	3743	2233	9879	16903
Comilla	2035	5477	3172	9586	20270
Chittagong	1907	2692	3383	3856	11838
Dhaka (East)	4073	3526	8023	8007	23629
Dhaka (West)	4780	3416	8301	7117	23614
Khulna	1428	2706	3952	7492	15578
Kushtia	990	3882	2577	10317	17766
Mymensingh	1789	4213	4149	9067	19218
Rajshahi	1448	3669	3289	8413	16819
Rangpur	1741	4270	3614	8981	18606
Sylhet	1889	4129	3780	8603	18401
Total	**24524**	**46887**	**48905**	**103831**	**224147**

Chapter-Two

METHODOLOGY AND IMPLEMENTATION

2.1 Nature of the Study

The study was basically a sample survey with structured questions among systematic randomly selected outlets in order to estimate the study variables for vertical and lateral comparison and also to set directions for the future. A detail questionnaire was thus developed including judgment questions and observational findings to address the objectives and information coverage presented in the previous chapter.

2.2 Respondents of the Study

a) Owner/ salesman of the sample pharmacies who usually sits in the shop and/or most aware about the purchase and sales of the products.

b) Owner/ salesman of the sample non-pharmacies (Grocery, General Store and Kiosk) who usually sits in the shop and/or most aware about the purchase and sales of the products.

2.3 Sampling Design

At first minimum number of sample pharmacies was determined for each SMC Area considering statistical validity and also on practical considerations discussing with SMC. Although the number of non-pharmacies is 2-3 times more than that of the pharmacies, and also there is variety in type of outlets, double number of non-pharmacies were taken as the sample considering less effort of the sales force on non-pharmacies because on the ground of focus of the sales force and cost, and also for cost and time implications on the study.

2.3.1 Sample Size for Pharmacy

SMC's sufficient distribution network has 85 men-strong sales force who supply SMC brands in about 225,000 outlets each year on which 35% are pharmacies and 65% non-pharmacies. Besides large number of retailers take supplies from stockiest.

As the size of this larger universe is not known (Per SMC Sales Office), the following formula has been used to calculate the sample size for retail outlets in each SMC Sales Office. The formula is as follows;

$n = pq\,(z/e)^2$

Where 'n' is the required minimum number of statistically significant interviews (for each SMC Area Office); 'z' is the confidence level (the table value of z at 95% is 1.96); 'e' is the tolerable error of estimates (if +/- 4% is allowed, the value of e = 0.04); 'p' is a certain proportion in the universe), which, if unknown, the rule of thumb is 50% or 0.5; 'q' is the reciprocal of 'p'. The sample sizes thus derived is 600 outlets in each SMC Sales Area Office.

On the other hand, SMC's Sales Officers visited 35% of pharmacies and 65% of non-pharmacies during the last year. So sample has been divided based on the proportion of pharmacy and non-pharmacy visited outlet by SOs. It is to be noted that if rural and urban proportion is used to divide the pharmacy and non-pharmacy outlet, urban sample shows insufficient to represent urban outlet. So equal number of rural and urban sample outlets has been taken for pharmacy and non-pharmacy outlets. This would enable getting reasonable estimates separately for urban and rural pharmacies and non-pharmacies. The following table shows the calculation of pharmacy and non-pharmacy sample outlets visited by SMC Sales Officers.

Table 2.1: Calculation Pharmacy and Non-pharmacy Sample by SMC Sales Offices

Area Sales Office	Total Pharmacy outlets visited (A)	Total Non-Pharmacy outlets visited (B)	Total visited outlets (C)	Ratio of Pharmacy outlets (D)	Ratio of Non-Pharmacy outlets (E)	Total Sample will be covered for each SMC Sales Office (F)
Barisal	6560	14945	21505	.31	.69	600
Bogra	4791	12112	16903	.28	.72	600
Comilla	7512	12758	20270	.37	.63	600
Chittagong	4599	7239	11838	.39	.61	600
Dhaka East	7599	16030	23629	.32	.68	600
Dhaka West	8196	15418	23614	.35	.65	600
Khulna	4134	11444	15578	.27	.73	600
Kushtia	4872	2894	17766	.27	.73	600
Mymensingh	6002	13216	19218	.31	.69	600
Rajshahi	5117	11702	16819	.30	.70	600
Rangpur	6011	12595	18606	.32	.68	600
Sylhet	6018	12383	18401	.33	.67	600
Total	**71411**	**152736**	**224147**			**7200**

Table 2.1: Calculation of Pharmacy and Non-pharmacy Sample Outlets by SMC Sales Office (Cont.)

Area Sales Office	Total Sample		Total Sample of Pharmacy		Total Sample of Non-Pharmacy	
	Total Pharmacy Sample will be covered (G)	Total Non-pharmacy Sample will be covered (H)	Total Rural Pharmacy Sample will be covered (I)	Total Urban Pharmacy Sample will be covered (J)	Total Rural Non-pharmacy Sample will be covered (K)	Total Urban Non-pharmacy Sample will be covered (L)
Barisal	183	417	92	92	208	208
Bogra	170	430	85	85	215	215
Comilla	222	378	111	111	189	189
Chittagong	233	367	117	117	183	183
Dhaka (East)	193	407	96	96	204	204
Dhaka (West)	208	392	104	104	196	196
Khulna	159	441	80	80	220	220
Kushtia	165	435	82	82	218	218
Mymensingh	187	413	94	94	206	206
Rajshahi	183	417	91	91	209	209
Rangpur	194	406	97	97	203	203
Sylhet	196	404	98	98	202	202
Total	**2294**	**4906**	**1147**	**1147**	**2453**	**2453**
	7200		**2294**		**4906**	
Area Average	**600**		**192**		**408**	

Calculation of samples:

C = A+B
D = A/C x 100
E = B/C x 100
F = pq $(z/e)^2$
G = F x D
H = F x E
I = G x .50
J = G x .50
K = H x .50
L = H x .50

It can be seen from the above table that the ratio of pharmacy and non-pharmacy is about 1:2 in each SMC Sales Area Office. To get a representative, standard and sufficient number of samples according to each Sales area, 1 pharmacy: 2 non-pharmacy, has considered as the sample in each Sales Areas. The ratio of urban and rural also varies according to visited pharmacy and non-pharmacy outlets by the SOs. Similarly, to get sufficient number for urban and rural sample, urban and rural pharmacy and non-pharmacy outlets has been divided equally. Finally, the following table represents the sample size for both pharmacy and non-pharmacy outlets.

Table 2.2: Distribution of Sample Outlets by SMC Area

SMC Sales Areas	Sample Pharmacy Interviewed			Sample Non-pharmacy Interviewed			All		
	Urban	Rural	All	Urban	Rural	All	Pharmacy	Non-Pharmacy	Total Sample
Bogra	100	100	200	200	200	400	200	400	600
Rajshahi	100	100	200	200	200	400	200	400	600
Rangpur	100	100	200	200	200	400	200	400	600
Chittagong	100	100	200	200	200	400	200	400	600
Comilla	100	100	200	200	200	400	200	400	600
Sylhet	100	100	200	200	200	400	200	400	600
Dhaka East	100	100	200	200	200	400	200	400	600
Dhaka West	100	100	200	200	200	400	200	400	600
Mymensingh	100	100	200	200	200	400	200	400	600
Khulna	100	100	200	200	200	400	200	400	600
Kushtia	100	100	200	200	200	400	200	400	600
Barisal	100	100	200	200	200	400	200	400	600
N (National)	**1200**	**1200**	**2400**	**2400**	**2400**	**4800**	**2400**	**4800**	**7200**

So above-mentioned table revealed that total 7200 outlets has been covered for this study where 2400 has been covered for pharmacy outlets and 4800 has been covered for non-pharmacy outlets.

2.4 Selection of Sample

2.4.1 Pharmacy Sample

For each Sales Office territory all district towns has been selected for urban sample and at least one Upazila has been selected randomly from each of the district and as well as two rural markets has been selected each of these Upazila randomly for rural sample. District sample has collected from 3-5 random markets, which has been drawn from the list of Markets provided by SMC. District town has constituted the urban sample. On the other hand, Upazilas and rural markets has constituted rural sample. Rural sample has collected from the respective Upazila Sadar and other two rural markets from the same Upazila but at least 3 km distance from each other. The desired number of pharmacies for both urban and rural sample has been selected randomly using the pharmacy list prepared by the field investigators.

2.4.2 Non-pharmacy Sample

As stated above, double number of non-pharmacy has been selected for one pharmacy outlet. The non-pharmacies have been selected from the same area of the pharmacies but at a distance so that product availability is not affected. Typical Paan shop has been avoided in the selection procedure.

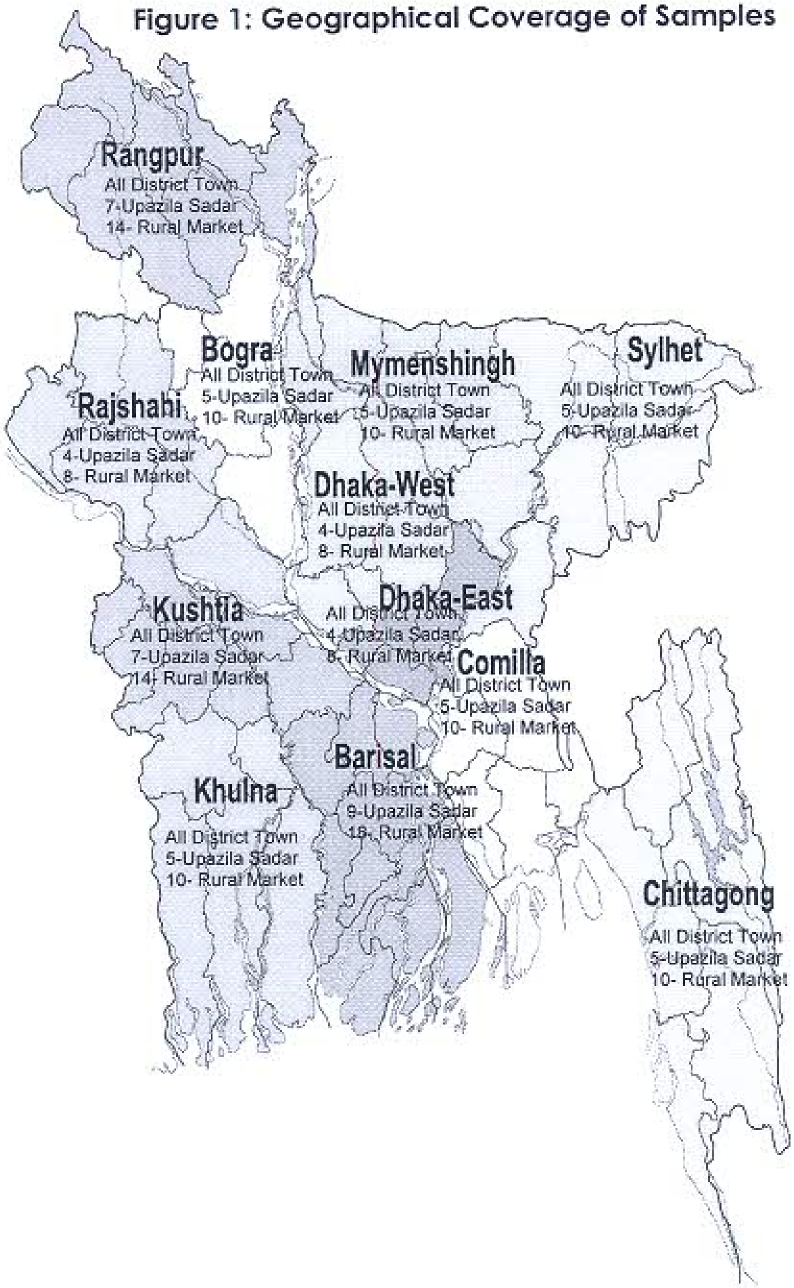
2.4.3 Geographical Coverage

The study covered nationally reprehensive, urban (Metro and other than Metro) and rural outlets. As per research sampling standards in Bangladesh, accepted by the leading buyers of marketing research in the country, nationally representative coverage has been achieved as follows;

- Urban (Metro and other than Metro) coverage: A six divisional Headquarter and all district headquarters have been selected for this study.
- Rural coverage: At least one (randomly selected) Upazilas under each of the urban (Metro and other than Metro) and district headquarters. Also at least two (randomly selected) rural market covered under selected each of the Upazilas for this study.

Therefore, a total of 64 urban and 64 rural areas have been covered for the study.

Figure 1: Geographical Coverage of Samples



2.5 Data Collection Instrument

A comprehensive questionnaire was used to collect information from the sample outlets. The questionnaire was thoroughly reviewed by SMC and it was finalized after pre-testing with some urban, rural, pharmacy and non-pharmacy outlets.

2.6 Field Data Collection

Twelve teams of Field Investigators (FIs) conducted the fieldwork, one team per SMC Area. Each team consisted of three male members and one of them designated as team leader with almost similar field responsibility. His additional responsibility in the field was field level planning and distribution of work among the team and reporting to the head office. The FIs conducted the outlet level interviews independently as per a strictly drawn up schedule. The field data were collected between April to May 2007.

2.7 Quality Control

Strict quality control measures were taken at all level of study implementation. The quality of field data collection was primarily ensured through proper selection of field team and preparing them for the task through training and motivation. They were reasonably paid and given the flexibility to work within the set parameters. Moreover, close monitoring and supervision were in place throughout the study implementation period to ensure that nobody commits any mistake due to negligence or lack of understanding.

Six Quality Control Officers (QCOs) were constantly in the field during the fieldwork to monitor/supervise the works of the teams and provided on-the-spot solutions to the problems faced. In addition, each QCO also carried out 10% back check of the filled-in questionnaires. SMC personnel also monitored the visit of FIs as per the fieldwork schedule and checked the quality through random visit.

2.8 Data Editing

Although the filled-in schedules were hundred percent edited in the field, further editing was done at Dhaka as soon as the schedules arrived. Whenever any problem was encountered they were clarified with the concerned field investigator.

2.9 Data Entry, Processing and Analysis

The questionnaires were so designed that the data from these questionnaires could be entered directly from the questionnaires after editing. MS-ACCESS was used in entry and SPSS for Windows Version 12 was used for data processing. The task of editing, coding and data entry was done under close supervision of the Principal Investigator assisted by Co-principal Investigator, Research Associate and the Programmer. The trained data entry operators have entered data and the programmer randomly checked daily-entered data. A tabulation plan has been prepared in consultation with SMC research person. This report presents the major findings with tables and graphs. The data file contains a lot of information that have not been presented. SMC might think of secondary analysis for the unprocessed part and also for cross tabulation.

Chapter Three

FINDINGS OF AVAILABILITY OF PRODUCTS

3.1 Availability of Products

3.1.1 Availability of Oral Pills

<u>Pharmacy:</u> Nordette-28 was the highest available oral pill brand (75%) in the pharmacies combined all areas followed by Femicon (68%), Ovostat Gold (47%), Minicon (38%) and Marvelon (33%). Almost similar trend was observed as regards availability of oral pills brands by location (Metro, urban and rural) and also by SMC Area except Rangpur (Table 3.1). Availability of other competitors brand such as Ovastat are 3.9%, Shukhi are less than 1% and other brands are less than 3%.

It is evident that metro and urban pharmacies had higher number of OCP brands per outlet as compared to rural pharmacies except Minicon. Regarding the availability of at least one brand of OCP at the metro and urban pharmacies, metro pharmacies showed slightly higher percentage as compared to urban pharmacies. Similarly, availability of OCP brands is higher in urban pharmacies than the rural pharmacies. However, study showed that most of the metro (89%), urban (85%) and rural pharmacies (82%) had at least one OCP of SMC brand at the time of survey. It is very important to mention that there is no significant difference among the proportion of availability of at least any brand of OCP and at least any SMC brand of OCP in metro, urban and rural pharmacies. It may further be noticed that 6% of metro, 10% of urban and 14% of rural pharmacies did not had any brand of OCP during the survey, and less than 2% of pharmacies did not sell any brand of OCP at all.

Looking further into the SMC Sales Areas it is observed that all Sales Areas had a better availability scenario of at least one brand of OCP (84%-99%) including at least one SMC brand as compared to Rangpur and Barisal area.

Non-pharmacy: Availability of oral pills in the non-pharmacies was only 5% nationally with higher proportion in rural (6%) than urban (4%) and they were mostly SMC brands.

About 91% of the sample non-pharmacies told that they did not sell pill at all and another 4% told that the stock was temporarily exhausted. Only 2-3 percent of the outlets had stock of any particular SMC brand and they kept mostly one brand. Very few outlets had stock of non-SMC pill.

A regional view shows that (Figure 1) availability of at least one SMC oral pill brand in non-pharmacies was the highest in Kushtia (18%) followed by Bogra (12%) and Rajshahi (9%) SMC Areas and lowest in Chittagong, Commila, Sylhet, Dhaka East and Barisal (less than 2%).

It can be mention that total 14 brands of Oral Pill were found in the market. Annex-1 shows the names of the brands.

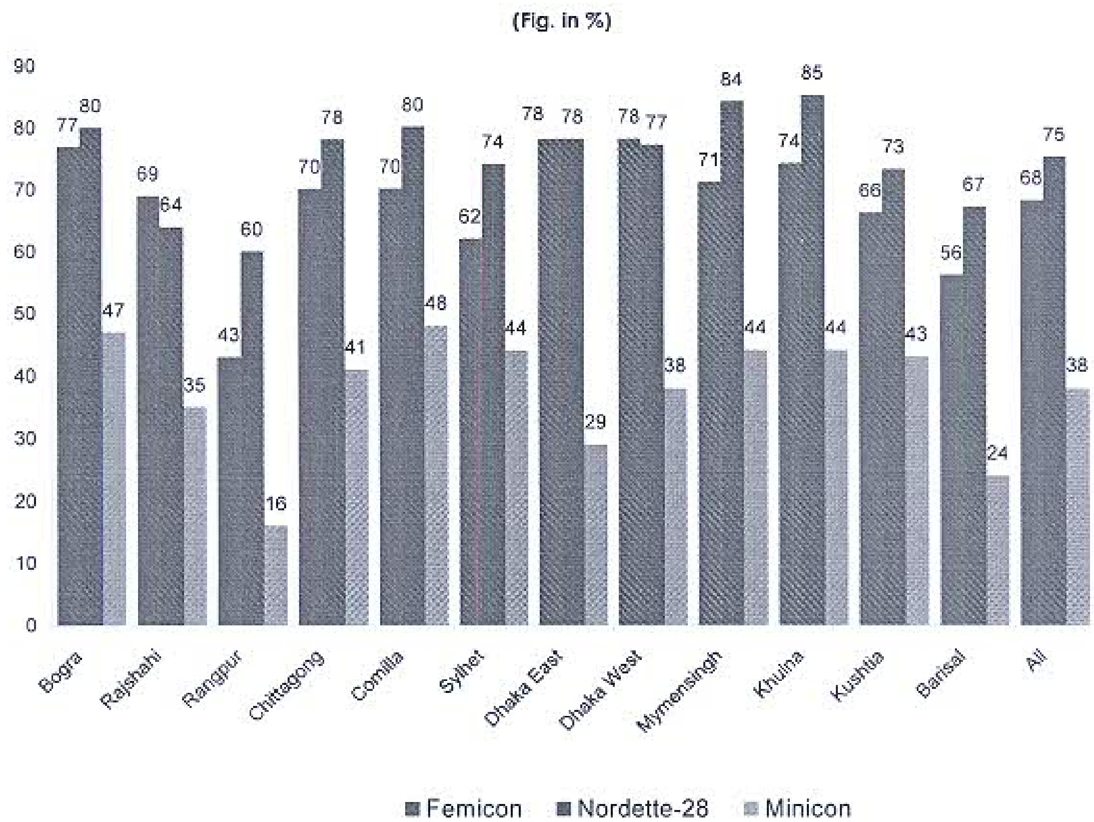
Table 3.1: Availability of Oral Pill Brands by Pharmacy and Non-pharmacy Outlets

(Fig. in %)

OCP Brands	Pharmacy					Non-pharmacy				
	Metro	Urban	Total Urban	Rural	All	Metro	Urban	Total Urban	Rural	All
Femicon	79.0	70.5	72.2	63.1	67.6	2.3	4.0	3.7	4.5	4.1
Nordette-28	84.5	76.3	77.9	71.7	74.8	0.2	2.3	1.9	2.3	2.1
Minicon	35.7	37.0	36.8	38.5	37.6	0.2	0.9	0.8	1.1	0.9
Marvelon	49.6	39.9	41.8	24.3	33.0	0.0	0.1	0.1	0.1	0.1
Ovostat	8.8	4.2	5.1	2.7	3.9	0.0	0.0	0.0	0.0	0.0
Ovostat Gold	54.6	51.8	52.3	41.9	47.1	0.0	0.2	0.1	0.2	0.2
Lyndiol	3.4	1.7	2.0	0.9	1.5	0.0	0.0	0.0	0.0	0.0
Sukhi	1.7	0.2	0.5	0.6	0.5	0.0	0.1	0.1	0.1	0.1
Nordette (Wyeth)	0.4	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Minulet	0.8	0.1	0.3	0.0	0.1	0.0	0.0	0.0	0.0	0.0
Cilest	0.4	0.1	0.2	0.1	0.1	0.0	0.0	0.0	0.0	0.0
Other rare brands	6.7	2.8	3.6	1.9	2.8	0.0	0.0	0.0	0.0	0.0
Temporary Stock-out	5.9	10.2	9.3	14.3	11.8	0.4	3.2	2.6	4.5	3.5
Does not sell any pill brand	2.5	1.4	1.6	1.0	1.3	97.1	92.0	93.0	89.8	91.4
At least one pill brand	91.6	88.5	89.1	84.7	86.9	2.5	4.8	4.3	5.8	5.1
At least one SMC brand	89.1	84.9	85.8	81.6	83.7	2.5	4.8	4.3	5.7	5.0
N = Outlets	**238**	**962**	**1200**	**1200**	**2400**	**476**	**1924**	**2400**	**2400**	**4800**

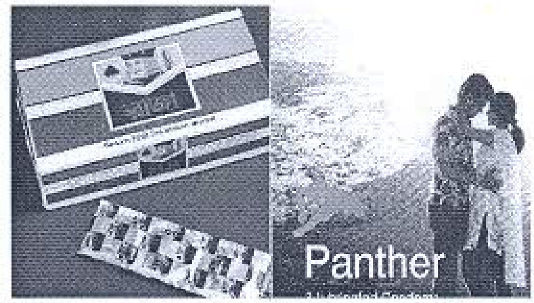
Figure-2

Availability of SMC's Oral Pill Brands in the Sample Outlets by SMC Sales Areas (All)

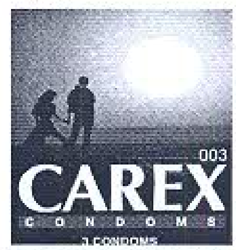


3.1.2 Availability of Condom

Pharmacy: There are several brands of condom available in the pharmacy and non-pharmacy outlets. Among the different brands, Panther was the highest available brand in the pharmacies (67%) closely followed by Sensation Classic (51%). The other available brands of condom were Sensation Strawberry (21%), Hero (20%), U&ME Long Love (18%), Sensation Mint (18%) and U&ME Anatomic (13%). The survey recorded 79 non-SMC commercial condom brands and some of them were found in the market in high proportion especially in metro and urban areas. Some of these brands are Green Love Dotted (7%), Titanic (6%), Green Love Super (5%), Freedom (5%) and Care (5%). However, study findings indicated that Raja were available only in 1% of pharmacies (Table 3.2).



Across the SMC area, availability of Panther varied between 51% (Rajshahi) and 87% (Mymensingh), Sensation Classic availability varied between 30% (Kushtia) and 65% (Mymensingh), and Sensation Strawberry availability between 4% (Rangpur) and 37% (Comilla). It has also been found that 87% of the pharmacies had at least one brand of Condom (82% SMC brands), 10% were reportedly out of stock at the time of the survey and 3% did not sell condom at all. Stock-out situation of condom in the pharmacies was the highest in Rangpur (19%) and the lowest in Mymensingh (3.5%) and Khulna (4%).



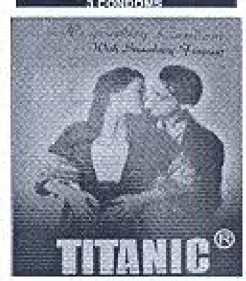


Table 3.2: Availability of SMC's Condom Brands at Pharmacy Outlets

(Fig. in %)

Sales Areas	Pharmacy							
	Raja	Hero	Panther	Sensation Classic	Sensation Mint	Sensation Strawberry	U&ME Long Love	U&ME Anatomic
Bogra	2.5	30.5	52.5	58.0	11.5	18.5	19.5	18.0
Rajshahi	4.0	14.5	51.5	49.0	17.0	18.5	17.0	12.0
Rangpur	0.5	16.5	61.0	51.5	18.5	3.5	24.0	3.0
Chittagong	0.5	21.0	80.0	43.0	26.0	13.5	14.0	5.5
Comilla	-	21.5	68.0	46.0	14.5	37.0	14.0	15.5
Sylhet	0.5	4.5	60.0	53.5	21.5	20.0	11.0	20.5
Dhaka East	1.0	15.0	61.0	56.5	17.0	26.0	22.0	12.5
Dhaka West	0.5	12.0	67.0	56.5	17.5	19.5	22.0	22.5
Mymensingh	-	21.5	87.5	64.5	16.0	10.5	19.0	6.0
Khulna	0.5	31.0	80.0	63.0	9.5	19.0	14.5	13.0
Kushtia	2.0	26.5	68.0	30.0	18.5	28.5	17.0	12.0
Barisal	0.5	21.0	69.5	48.0	23.5	33.0	17.5	14.0
All	**1.0**	**19.6**	**67.2**	**51.6**	**17.6**	**20.6**	**17.6**	**12.9**

* N=200 in each SMC area

Non-pharmacy: Availability of condom is quite lower in non-pharmacy outlet as compared to pharmacy. Nationally 14% of the non-pharmacies kept Hero, 9% kept Panther, 3% kept Sensation Classic and only 2.8% kept Raja. Similarly, there is an also higher difference among the availability of at least any one brand of condom in pharmacy and non-pharmacy outlets. Study findings indicated that only 24% of non-pharmacies kept any brand of condoms and 71% of non-pharmacies did not sell condom at all. Remaining 5% reportedly had gone out of stock at the time of the survey (Table 3.3).

It has also been observed from the detail tables that non-pharmacies are less likely to sell condom in metro areas and Hero was available more in rural (17%) than urban (11%) and metro (6%). It can be mentioned that total 87 brands of condom were found in the market. The name of all brands of condoms has presented in Annex-1. Availability of SMC's condom brands in the sample pharmacies and non-pharmacies has presented in the following table by SMC area.

Table 3.3: Availability of SMC's Condom Brands at Non-pharmacy Outlets

(Fig. in %)

Sales Areas	Non-pharmacy							
	Raja	Hero	Panther	Sensation Classic	Sensation Mint	Sensation Strawberry	U&ME Long Love	U&ME Anatomic
Bogra	3.8	19.5	13.8	7.0	0.3	1.3	0.3	0.5
Rajshahi	7.3	17.3	13.8	7.8	1.0	2.3	1.3	0.3
Rangpur	0.3	3.0	8.5	3.0	0.5	-	-	-
Chittagong	2.3	9.8	3.5	-	-	-	-	-
Comilla	5.3	11.5	4.0	0.3	0.3	-	0.3	0.3
Sylhet	2.5	15.0	5.3	2.0	0.8	1.0	0.8	0.8
Dhaka East	2.5	8.8	3.3	1.0	-	-	0.3	0.3
Dhaka West	3.0	11.3	7.8	4.8	0.5	0.8	-	-
Mymensingh	0.5	22.0	8.3	4.8	1.8	1.5	1.0	1.0
Khulna	0.5	3.0	3.3	1.3	0.3	0.3	-	-
Kushtia	2.5	28.0	30.0	5.3	1.5	3.0	2.5	2.5
Barisal	2.8	13.3	3.3	1.8	0.8	1.3	0.8	0.8
All	2.8	13.5	8.7	3.2	0.6	0.9	0.5	0.5

* N=400 in each SMC area

Table 3.4: Availability of Major Condom Brands at Pharmacy and Non-pharmacy Outlets

(Fig. in %)

Condom Brands	Pharmacy			Non-pharmacy		
	Urban	Rural	All	Urban	Rural	All
Hero	19.0	20.3	19.6	10.2	16.9	13.5
Panther	69.9	64.4	67.2	10.3	7.1	8.7
Sensation Classic	62.3	40.9	51.6	4.3	2.2	3.2
Sensation Mint	22.5	12.7	17.6	0.8	0.5	0.6
Sensation Strawberry	24.3	17.0	20.6	1.1	0.8	0.9
U&ME Long Love	23.1	12.2	17.6	0.8	0.4	0.6
U&ME Anatomic	17.2	8.6	12.9	0.6	0.4	0.5
Carex Dotted	5.3	1.3	3.3	0.1	-	0.0
Twin Lotus	4.3	2.9	3.6	0.7	0.4	0.5
Green Love Dotted	8.4	4.8	6.6	0.8	0.2	0.5
Green Love Super	5.1	5.4	5.3	0.5	0.2	0.4
Titanic	6.7	5.2	5.9	1.3	0.8	1.1
Freedom	6.3	3.4	4.9	0.4	0.2	0.3
Care	5.2	4.7	4.9	0.9	0.7	0.8
N = All Sample Outlets	1200	1200	2400	2400	2400	4800

3.1.3 Availability of ORS

Pharmacy: ORSaline-N brand of SMC was the single major brand available in 89% of the pharmacies followed by Tasty Saline Universal (46%), ORSaline Fruity (37%), Neo Saline (21%) and Rice-GSS (17%). In addition, Oral Saline Universal, BRAC Saline and Saline-R are available around 10% of pharmacies each (Table 3.5).

ORSaline-N availability was seen almost uniform across the SMC areas. However, in Mymensingh it was almost 99% and in Rangpur it was available in 78% of pharmacies. In metro/urban areas ORSaline-N availability was slightly better than that of rural (92% against 86%). Tasty Saline Universal was the second highest available ORS across the country with highest in Comilla (76%) followed by Dhaka East (65%) and Khulna (62%) SMC areas. However, regarding the availability of Tasty Saline Universal there is variation according to the SMC areas. It can be seen that Tasty Saline Universal were available in three-fourth pharmacies in Khulna but this brand was available only one-fifth pharmacies in Barisal.

Looking into segments, ORSaline Fruity availability was 52% in Sylhet followed by 46% Comilla and Mymensingh each. Availability of ORSaline Fruity was recorded low in Rangpur & Bogra (28% and 17% respectively).

Table 3.5: Availability of all ORS at Pharmacy and Non-pharmacy Outlets

(Fig. in %)

ORS Brands	Pharmacy			Non-pharmacy		
	Urban	Rural	All	Urban	Rural	All
ORSaline-N	91.6	85.9	88.8	48.5	36.2	42.4
ORSaline Fruity	39.3	34.8	37.1	3.8	2.9	3.3
Oral Saline (Universal)	6.7	11.8	9.3	2.4	2.9	2.7
Tasty Saline (Universal)	45.1	46.6	45.8	32.4	25.4	28.9
BRAC Saline	5.8	12.9	9.4	1.4	2.4	1.9
Khabar Saline (IBN Sina)	6.5	7.6	7.0	0.1	0.2	0.1
Saline-R	8.6	10.9	9.8	0.1	0.2	0.2
Saline Plus	4.1	4.5	4.3	0.1	0.1	0.1
Rice-GSS	17.2	16.6	16.9	0.0	0.1	0.1
Neo Saline	23.0	19.8	21.4	0.1	0.2	0.1
Other rare brands	21.8	29.8	25.8	4.2	7.7	5.9
Temporary stock-out	1.8	3.0	2.4	5.1	6.5	5.8
Does not sell any brand	0.2	0.5	0.3	38.0	45.6	41.8
At least one ORS brand	98.1	96.5	97.3	57.0	47.9	52.4
At least one SMC ORS available	93.3	89.3	91.3	49.8	38.2	44.0
N = All Sample Outlets	**1200**	**1200**	**2400**	**2400**	**2400**	**4800**

Non-pharmacy: ORSaline-N was found to be the single major ORS brand in the non-pharmacies. In 42% of all non-pharmaceutical outlets (metro 51%, urban 48% and rural 36%) ORSaline-N was available during survey period (Table 3.6). Among other brands Tasty Saline Universal was available in about 29% of the non-pharmacies followed by Oral Saline Fruity (3.3%) and Oral Saline Universal (2.7%). There were also 6% of pharmacies had other uncommon brands. Around 89 non-SMC commercial brands have merged into other brands. Availability of all ORS brands was found higher in Bogra, Dhaka East, Mymensingh, Khulna and Kushtia. On the other hand, availability was low in Barisal and Chittagong SMC areas (Table 3.6, Table 3.7).

It can be mention that total 90 brands of ORS were found selling in the market during the survey. The name of all ORS has attached in the Annex-1.

Availability of ORSaline brand in the sample pharmacies and non-pharmacies broken down into metro, urban and rural is presented in the table below by SMC's area.

Table 3.6: Availability of ORSaline-N at Pharmacy and Non-pharmacy Outlets

(Fig. in %)

Sales Areas	Pharmacy				Non-pharmacy			
	Urban	Rural	All	N	Urban	Rural	All	N
Bogra	96.0	91.0	93.5	200	62.0	52.5	57.3	400
Rajshahi	88.0	78.0	83.0	200	58.0	30.0	44.0	400
Rangpur	82.0	74.0	78.0	200	36.5	20.5	28.5	400
Chittagong	94.0	77.0	85.5	200	25.5	18.5	22.0	400
Comilla	94.0	90.0	92.0	200	28.0	19.5	23.8	400
Sylhet	91.0	79.0	85.0	200	50.0	22.0	36.3	400
Dhaka East	92.0	90.0	91.0	200	54.5	36.0	45.3	400
Dhaka West	91.0	93.0	62.0	200	36.5	42.5	39.5	400
Mymensingh	98.0	99.0	98.5	200	60.5	40.5	50.5	400
Khulna	97.0	97.0	97.0	200	70.0	65.5	67.8	400
Kushtia	87.0	76.0	81.5	200	66.5	46.5	56.5	400
Barisal	89.0	87.0	88.0	200	34.0	40.0	37.0	400
All	**91.6**	**85.9**	**88.8**	**2400**	**48.5**	**36.2**	**42.4**	**4800**

Table 3.7: Availability of ORSaline Fruity at Pharmacy and Non-pharmacy Outlets

(Fig. in %)

Sales Areas	Pharmacy				Non-pharmacy			
	Urban	Rural	All	N	Urban	Rural	All	N
Bogra	16.0	17.0	16.5	200	1.5	1.0	1.3	400
Rajshahi	37.0	28.0	32.5	200	2.5	0.5	1.5	400
Rangpur	32.0	24.0	28.0	200	4.0	1.5	2.8	400
Chittagong	50.0	26.0	38.0	200	0.5	1.5	1.0	400
Comilla	51.0	40.	45.5	200	5.0	2.0	3.5	400
Sylhet	62.0	41.0	51.5	200	4.5	1.5	3.0	400
Dhaka East	39.0	44.0	41.5	200	3.0	1.0	2.0	400
Dhaka West	42.0	33.0	37.5	200	3.0	3.5	3.3	400
Mymensingh	41.0	50.0	45.5	200	4.0	3.0	3.5	400
Khulna	37.0	39.0	38.0	200	11.0	10.5	10.5	400
Kushtia	31.0	33.0	32.0	200	3.5	5.5	4.5	400
Barisal	34.0	43.0	38.5	200	3.0	3.0	3.0	400
All	**39.3**	**34.8**	**37.1**	**2400**	**3.8**	**2.9**	**3.3**	**4800**

3.1.4 Availability of OCP Brands (SMC) at Pharmacy by the Frequency of SOs Visit

The study also tried to show the percentage of availability of SMC OCP brands according to the frequency of SOs visit. It can be seen that more than one-third of the urban outlets had SMC brand (Femicon 34%, Nordette-28 34%, Minicon 36%) during the survey where SOs visited once in a week. On the other hand, less than one-fourth of the rural outlets mentioned that SOs visited once in a fortnight (Femicon 16%, Nordette-28 17%, Minicon 18%). Finally it can be seen from the following table that around fifty to sixty percent of the urban and rural outlets reported that the SOs visited the outlets within a month. It can be noted that one in five respondents mentioned that SOs did not follow any schedule to visit the outlets.

The frequency of visit by the SO has in most cases a direct relationship with the availability of SMC OCP brands in the urban outlets, excepting in rural outlets where the availability is almost similar or higher when the SO visits once in a fortnight rather than once in a week or once in a month. The positive co-relationship between the lesser frequency of visit and lesser availability is strongly evident in urban outlets as shown in the table below. Relatively higher availability of OCPs with no scheduled SO visit or never visit at all in both urban and rural pharmacies is probably a result of the retailers' independent decision to self -supply to meet client demand.

Table 3.8: Availability of OCP of SMC at Pharmacy by the Frequency of SOs Visit

(Fig. in %)

Frequency of visit by SOs	Femicon		Nordette-28		Minicon	
	Urban	Rural	Urban	Rural	Urban	Rural
Once in a week	34.2	16.1	34.4	16.9	36.1	18.2
Once in a fortnight	16.4	25.5	16.5	24.8	18.8	26.2
Once in a month	13.7	16.2	14.0	18.0	14.1	15.8
Once in a two months	5.5	8.6	6.3	8.3	4.8	8.0
Once in > two months	0.8	0.8	0.9	1.0	0.5.	1.1
Don't know	2.9	3.2	3.2	2.7	2.3	2.6
No schedule	16.9	21.7	16.4	18.6	15.4	18.8
Never visited	9.6	11.0	8.3	9.8	8.2	19.3
N	**866**	**757**	**935**	**860**	**441**	**462**

Similar findings can be observed in case of SMC ORS brands where SOs were visiting urban outlets more as compared to rural within a week. On the contrary, SOs were visiting rural outlets more within a fortnight. However, data showed that most of the SOs were visiting outlets within a month though some of the outlets could not mention the schedule of SOs visit.

The frequency of visit by SO and the availability of ORS correlation follows a similar trend in the ORS category as in the OCP category.

Table 3.9: Availability of ORS of SMC at Pharmacy by the Frequency of SOs Visit

(Fig. in %)

Frequency of Visit by SOs	ORSaline-N		ORSaline Fruity	
	Urban	Rural	Urban	Rural
Once in a week	22.2	12.0	35.3	19.3
Once in a fortnight	16.0	22.4	20.6	27.1
Once in a month	11.5	16.2	12.6	20.5
Once in a two months	6.0	7.4	3.9	8.2
Once in > two months	0.4	0.5	0.5	1.0
Don't know	2.1	2.4	2.7	1.8
No schedule	13.9	17.6	14.0	12.7
Never visited	27.9	21.6	10.3	9.2
N	**2264**	**1899**	**563**	**487**

Regarding condom brands most of the respondents mentioned that SOs were visiting outlets within a month. The availability of condom brands in the outlets mostly goes lower, with some exceptions regarding the 'no schedule' and 'never visited' groups as the frequency of SO visits goes lower.

Table 3.10: Availability of Condom Brands (SMC) at Pharmacy Outlets by the Frequency of SOs Visit (All Urban and Rural)

(Fig. in %)

Condom brand	Frequency of visit by the SOs								
	Once in a week	Once in a fortnight	Once in a month	Once in a two month	Once in > two month	Don't know	No schedule	Never visited	N
Hero	19.6	28.0	18.8	5.9	0.4	1.5	15.0	10.8	**471**
Panther	22.6	21.7	16.1	7.3	0.8	2.8	17.6	11.1	**1612**
Sensation classic	29.3	22.7	15.1	6.1	0.8	2.3	6.1	7.6	**1239**
Sensation Mint	33.8	25.7	16.2	6.0	0.7	1.1	12.4	4.2	**422**
Sensation Strawberry	32.0	25.4	15.2	5.4	0.7	1.7	15.2	4.4	**495**
U&ME Long Love	42.4	22.9	12.0	4.7	1.1	1.1	13.8	2.0	**423**
U&ME Anatomic	42.8	27.2	11.3	3.3	-	2.4	9.3	2.7	**309**

Chapter Four

FINDINGS OF CURRENT STOCK LEVEL, PURCHASING AND SELLING PRICE OF SMC PRODUCTS

4.1 Average Current Stock Level of SMC Brands

The respondents who had sold SMC Oral Pill (Femicon, Nordette-28 and Minicon) were asked to know the average stock level of these three pills during the survey. The average current stock level of Femicon, Nordette-28 and Minicon were 32, 20 and 14 cycles respectively at pharmacy outlets whereas average stock levels of these pills were respectively 20, 15 and 15 cycles at non-pharmacy outlets. Though data shows that the average current stock level of Minicon is higher in non-pharmacy compared to pharmacy outlets, but it happened due to lower number of non-pharmacy outlets sold Minicon with higher stock level. On the other hand, average current stock level of Femicon at pharmacy was higher in Rangpur (urban: 57 and rural: 61 cycles) and lower in Dhaka West (urban: 27 and rural: 17 cycles). Average current stock level of Nordette-28 at pharmacy was also higher in Rangpur (urban: 32 and rural: 40 cycles) and lower in Dhaka West (urban: 17 and rural: 11 cycles), but Minicon was higher in Mymensingh (urban: 28 and rural: 29 cycles) and lower in Khulna (urban: 6 and rural: 8 cycles). Since availability of SMC Oral Pill at non-pharmacy is quite poor, so that it is no useful to see the variations of stock level of pills according to the SMC sales areas.

It has been observed that Panther and Sensation Classic were mostly available condoms in pharmacies; Panther and Hero were widely available in non-pharmacies as compared to other brands. But the average current stock level of Hero (urban: 75 and rural: 56 pieces) and Panther (urban: 38 and rural: 28 packets) are quite higher as compared to other brands at pharmacy outlets. On the other hand, at non-pharmacy outlets the average highest stock level of condom was Hero (urban: 75 and rural: 94 pieces) followed by Sensation Classic (urban: 25 and rural: 18 packets) and Panther (urban: 22 and rural: 19 packets). Data showed that average stock level of Raja is 95 pieces in non-pharmacy outlets but very few number of them were selling Raja. So it can be assumed that average current sales of Hero, Panther and sensation Classic were quite satisfactory.

Data showed that any ORS were available around 97% of pharmacy outlets and 52% of non-pharmacy outlets. However, among them majority had SMC brand. The average current stock level of ORSaline-N was 160 and 63 sachets at pharmacy and non-pharmacy outlets respectively. Similarly, average current stock level of ORSaline Fruity was 56 and 33 sachet respectively at pharmacy and non-pharmacy outlets.

4.2 Average Number of Stock out events of SMC Products During Last Six Months

The following table represents the cross distribution of average number of stock out event of SMC products by outlets and location. The average number of stock out events for Pill and ORS are almost same times for pharmacy (3 times) and non-pharmacy (2 times) outlets. On the other hand, the number of stock out events for condom was about 2 times for both pharmacy and non-pharmacy and by urban and rural.

Table 4.1: Average Number of Stock out Events of SMC Products During Last Six Months

(Fig. in event)

SMC Brands	Pharmacy				Non-pharmacy			
	Urban	Rural	All	N	Urban	Rural	All	N
Femicon	3.74	3.79	3.71	1551	2.24	3.02	2.74	230
Nordette-28	3.35	3.00	3.16	631	2.61	1.82	2.10	54
Minicon	3.27	3.22	3.29	983	4.00	2.39	2.84	45
Hero	3.08	2.00	2.52	56	2.36	2.22	2.27	114
Panther	2.89	2.92	2.90	534	2.40	1.85	2.15	180
Sensation Classic	3.36	2.27	2.74	97	3.06	2.0	2.59	27
Sensation Mint Flavor	3.09	2.64	2.94	85	1.57	1.50	1.56	9
Sensation Strawberry	2.30	2.36	2.32	95	2.14	2.25	2.18	11
U&ME Long Love	2.43	1.41	2.11	54	1.20	-	1.20	6
U&ME Anatomic	3.24	1.17	2.89	35	-	1.00	1.00	1
ORSaline-N	3.62	3.24	3.41	466	2.96	2.74	2.86	700
ORSaline Fruity	2.80	2.18	2.46	120	1.73	2.25	2.06	31

4.3 Average Sales of SMC Brands Per Month

The respondents who sold SMC Oral Pill (Femicon, Nordette-28 and Minicon) during the survey were asked to figure out the average sales of these three pills per month. On average sale of OCP cycle was quite higher for pharmacies as compared to non-pharmacies. However, there is some variation on OCP sales according to urban and rural areas. On an average the pharmacy outlet sold 96 cycles of Femicon, 55 cycles of Nordette-28 and 31 cycles of Minicon. On the other hand, the non-pharmacy outlets sold 32, 18 and 14 cycles of Femicon, Nordette-28 and Minicon respectively per month. Study also observed some variations according to SMC Sales areas at pharmacy outlets, higher cycles of Femicon were sold in Bogra (127), Barisal (111), Rajshahi (109) and Sylhet (104) and lower sales status was observed in Dhaka West (72) and Chittagong (79). Regarding Nordette-28, higher cycles were sold in Mymensingh (131) and Rangpur (87) and comparatively lower sales were observed in Dhaka East and Khulna 42 cycles each. Minicon was also sold higher in Mymensingh (95) and Rangpur (53) and comparatively lower sales were observed in Rajshahi (16) and Kushtia (17).

It has been observed that Panther and Sensation Classic were mostly available condoms in pharmacies and Panther and Hero were widely available in non-pharmacies as compared to other brands. However, it does not depict the same trend for average sales of packet/piece of condom. The pharmacy where condom brand of SMC were available, among them average sales of packets/pieces were higher for Hero (94) followed by panther (78), Sensation Classic (66), Sensation Mint (49), Sensation Strawberry (43), U&ME long Love (41) and U&ME Anatomic (31). On the other hand, in non-pharmacy outlets higher average sales were observed for Hero (99) followed by Raja (50), Sensation Classic (46), Sensation Mint (46), Panther (39), Sensation Strawberry (36), U&ME Anatomic (25) and U&ME Long Love (24).

ORS were available both at pharmacy and non-pharmacy outlets. However, among them majority had SMC brand. The pharmacy outlets that kept ORSaline-N, on average they sold 409 sachet in each month and those who kept ORSaline Fruity they sold 128 sachet. Similarly, the average sales by non-pharmacy outlets are 154 and 68 respectively.

4.4 Current Purchasing and Selling Price

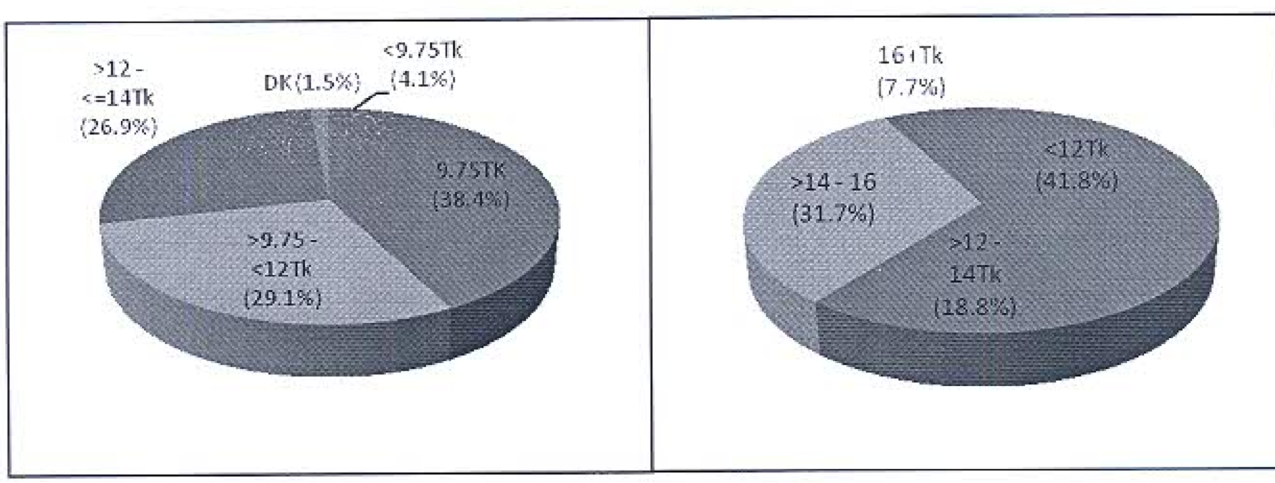
One of the important issues for the study was to know the purchasing and selling price of available brand of Pill, Condom and ORS. To retain a significant market share it is important for SMC to know the purchasing and selling price of their products. SMC is distributing their products all over the country in a fixed price as well as selling price is also fixed. Yet, current selling price varies in few pharmacy and non-pharmacy outlets. Though the price of SMC brands were varying, yet the median price were the current MRP for all brands of OCP, Condom and ORS. Some of the main findings of the price of the survey have presented below separately for OCP, Condom and ORS. Due to less availability of oral pills in non-pharmacies study has concentrated on pharmacies only. Also study did not compare the purchase price of SMC with other competitor brands.

4.4.1 Oral Pill

Surveyed purchased price of Femicon ranged from Tk.9.75 to Tk.14.00 per cycle. Although the median purchased price of Femicon was Tk.10.00, the mean price was Tk.11.12. On the other hand, the median selling price of Femicon was Tk. 14.00 and the mean selling price was Tk. 13.78. SMC price to traders is Tk. 9.75 and MRP is Tk. 12.00. It can be seen from the table that 38% of pharmacy and 53% of non-pharmacy purchased at SMC traders price and 99% of pharmacy and 99% of non-pharmacy sold Femicon at SMC MRP.

Figure-3

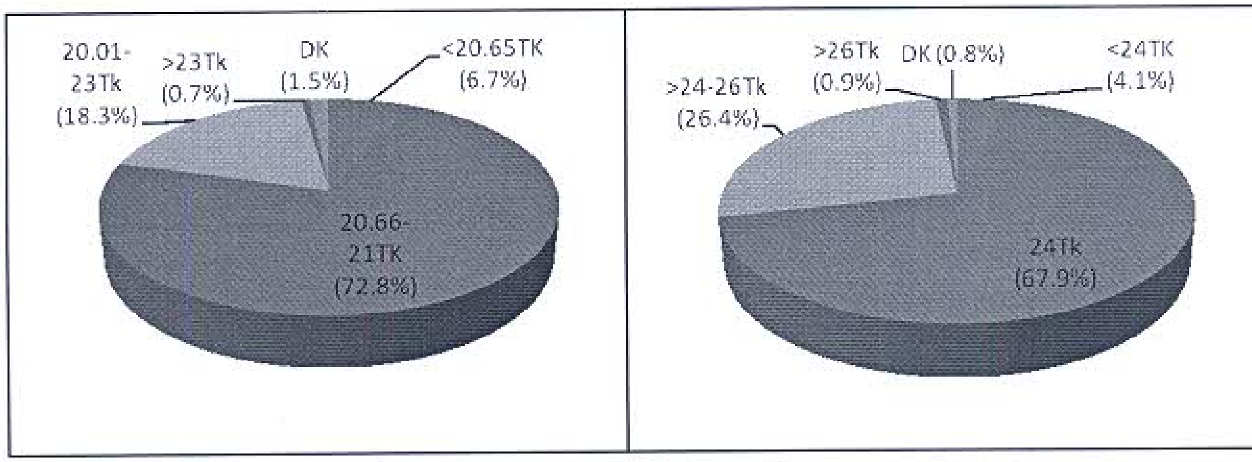
Current Purchase Price of Femicon **Current Selling Price of Femicon**



Purchased price of Nordette-28 varied between Tk.20.65 to Tk.25+ per cycle. Although the median purchased price of Nordette-28 was Tk.21.00, the mean price was Tk.21.11. On the other hand, the median selling price of Nordette-28 was Tk. 24.00 and the mean selling price was Tk. 24.27. SMC price to traders is Tk. 20.65 and MRP is Tk. 24.46. It can be seen from the table that purchased and selling price for both pharmacy and non-pharmacy universally coincides with SMC traders and MRP.

Figure-4

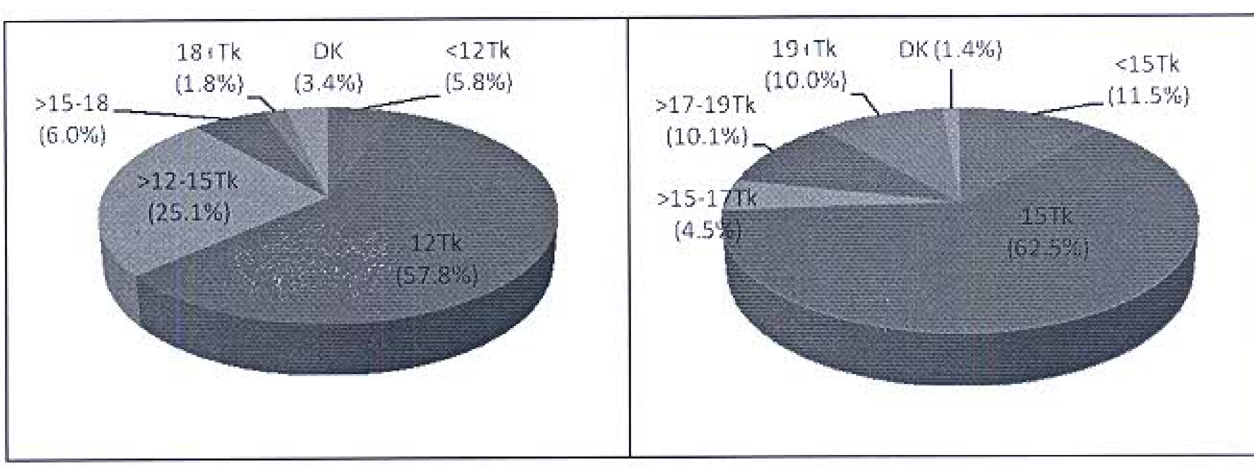
Current Purchase Price of Nordette-28 **Current Selling Price of Nordette-28**



Another important OPC of SMC is Minicon. Data showed that the purchased price of Minicon varied between Tk. 12.00 to Tk.18+ per cycle. The median purchased price of Minicon was Tk.12.00, the mean price was Tk.12.84. However, the median selling price of Minicon was Tk. 15.00 and the mean selling price was Tk. 15.74. Likewise Nordette-28, the purchased and selling price for both pharmacy and non-pharmacy of MInicon universally coincides with SMC traders and MRP.

Figure-5

Current Purchase Price of Minicon **Current Selling Price of Minicon**



4.4.2 Condom

Raja is a non-pharmacy brand and the survey showed that purchased price ranged between 40-60 paisa per piece and about 81% outlets sold Raja at the price of Tk. 1.00 and 12 % sold at more than Tk. 1.00. About three-fourth of the outlets purchased Hero at Tk. 1.60 and more than 90% outlets sold at Tk. 2.00.

The median purchased price of Panther was Tk.6.57 and mean price was Tk. 6.74 per pack at 48.6% of pharmacy and 61% of non-pharmacy outlets. The median selling price of Panther was Tk.8.00 per pack and mean was Tk. 8.16.

Sensation Classic as a widely available brand was found mostly purchased at Tk.8.00 and sold at Tk.10.00 per pack in both pharmacies and non-pharmacies in more than three-fourth of cases. More than fifty percent of outlets purchased Sensation Strawberry at Tk. 8.75 and sold at Tk.12.00. Sixty three percent of pharmacy purchased Sensation Mint at Tk.8.75 and 42% of non-pharmacy purchased at the same. Eighteen percent of pharmacy and 26% of non-pharmacy purchased below SMC price (Tk. 8.75) to traders and rest purchased more than SMC price. Similarly, 60% of outlets, both pharmacy and non-pharmacy sold at SMC MRP (Tk.12.00) more than one-fourth sold below MRP. Majority outlets of pharmacy and non-pharmacy purchased U&ME Anatomic at Tk. 11.00 and sold at Tk.15.00 and rest purchased at higher than SMC price and sold higher than SMC MRP. Similarly, unanimously pharmacy and non-pharmacy outlets purchased at SMC price (Tk.15.00) as well as sold at SMC MRP (Tk.20.00).

Table 4.2: Purchase Price of SMC Brands at Pharmacy Outlets

SMC Brands	Purchase Price				Selling Price				
	Less (%)	At SMC Price (%)	More (%)	Average (Taka)	Less (%)	At SMC Price (%)	More (%)	Average (Taka)	N
Hero	17.5	72.9	6.7	1.6	0.4	95.1	4.4	2.0	471
Panther	7.0	48.6	42.4	6.7	0.4	91.1	7.7	8.1	1612
Sensation Classic	5.0	76.1	15.8	8.1	1.6	89.0	8.5	10.8	1239
Sensation Mint	17.7	62.8	16.0	8.8	34.7	59.9	5.4	11.5	422
Sensation strawberry	16.5	56.3	24.0	8.9	30.8	65.7	3.6	11.5	495
U&ME Long Love	-	89.7	6.7	18.1	8.4	90.7	-	20.5	423
U&ME Anatomic	3.2	71.4	20.9	11.5	7.1	83.0	8.7	15.2	309

*Only few responses did not mention the purchase and selling price

Table 4.3: Purchase Price of SMC Brands at Non-pharmacy Outlets

SMC Brands	Purchase Price				Selling Price				
	Less (%)	At SMC Price (%)	More (%)	Average (Taka)	Less (%)	At SMC Price (%)	More (%)	Average (Taka)	N
Hero	14.9	75.5	8.5	1.6	5.5	91.6	2.9	2.0	649
Panther	5.6	61.2	31.9	6.7	1.4	87.2	11.4	8.2	418
Sensation Classic	6.7	80.4	11.1	8.6	-	96.6	7.3	10.2	155
Sensation Mint	25.8	41.9	22.6	8.8	25.8	61.3	9.7	11.9	30
Sensation strawberry	10.2	71.4	16.3	8.8	34.7	63.3	2.0	11.3	45
U&ME Long Love	-	96.4	-	18.0	7.2	92.9	-	19.8	27
U&ME Anatomic	-	88.9	7.4	11.5	3.7	88.9	7.4	15.3	25

*Only few responses did not mention the purchase and selling price

4.4.3 ORS

More than three-fourth of the pharmacy and non-pharmacy outlets purchased ORSaline-N at Tk.2.50 per sachet and rest purchased at higher than Tk.2.50. Data also showed that unanimously pharmacy and non-pharmacy outlets sold ORSaline-N at Tk.3.00. However, about 3% of pharmacy and 11% of non-pharmacy sold at higher taka than SMC MRP. Another SMC flavor ORS brand is ORSaline Fruity (Mango and Orange) which was commonly purchased at Tk.3.90 to Tk.4.00. More than 4% of outlets purchased at higher than Tk.4.00. Almost cent percent of the outlets sold at SMC MRP. The purchased price of Testy Saline (Universal) varied between Tk.2.90 to Tk.3.50. About 10% purchased at Tk.2.90, 73% purchased at Tk.2.90 to Tk.3.00 and rest purchased at Tk.3.00 to Tk.3.50. The selling price of Testy Saline did not varied according to pharmacy and non-pharmacy and about cent percent sold at Tk.4.00 to Tk.5.00.

Figure:6

Current Purchase Price of ORSaline-N **Current Selling Price of ORSaline-N**

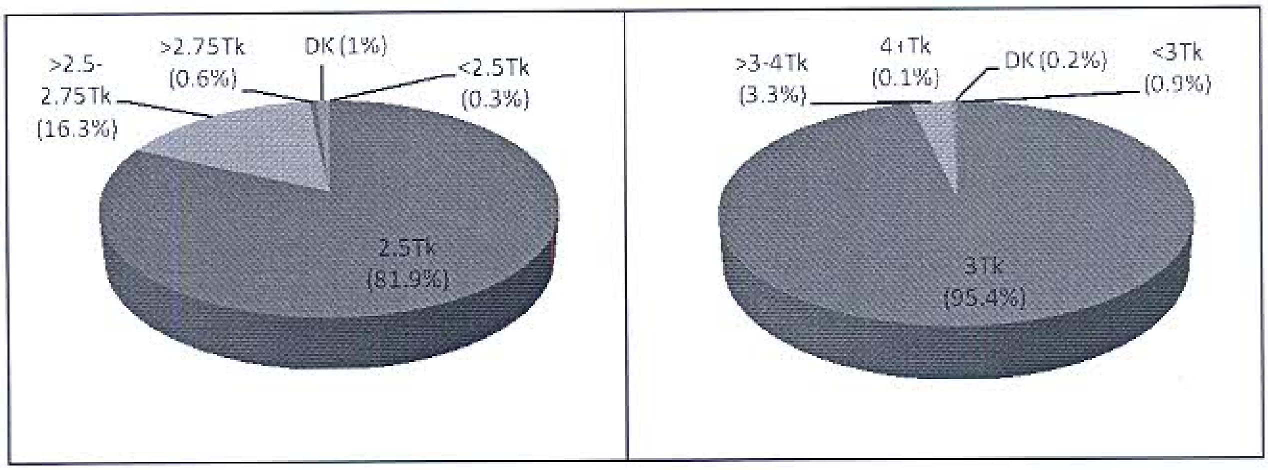


Figure-7

Current Purchase Price of ORSaline Fruity **Current Selling Price of ORSaline Fruity**

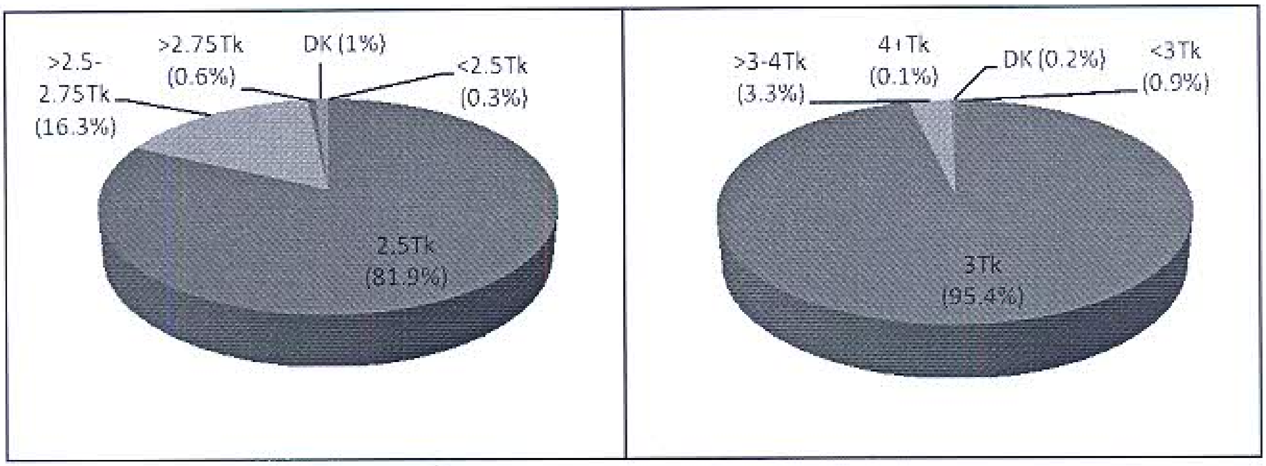
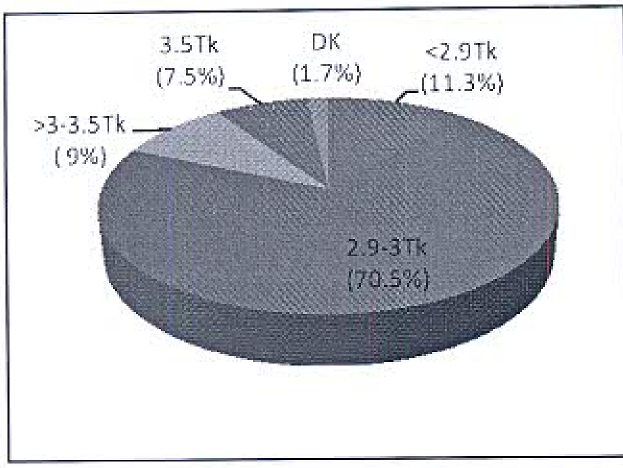
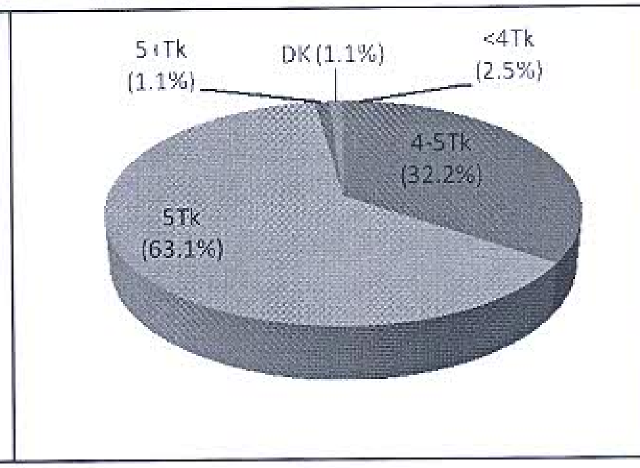


Figure-8

Current Purchase Price of Tasty Saline



Current Selling Price of Tasty Saline



Chapter Five

FINDINGS OF PURCHASING HABIT OF SMC PRODUCTS AND LAST PURCHASE DETAILS

5.1.1 Ways to Replenish SMC Brands When Exhausted

The outlets keeping at least one brand of oral pill, condom or ORS were asked about their usual purchasing habit of SMC products when SMC products were exhausted. Overall, half of the pharmacy and one-third of the non-pharmacy respondents reported that they bought the products from the nearby shop/market. About one-fourth of the respondents of the pharmacy and non-pharmacy each reported that they waited for SMC sales persons to visit. Others mostly told that they bought from the wholesaler. Looking by SMC area, bought from nearby shop/market were high in Rajshahi (67%) followed by Khulna (65%), Chittagong (55%) and Comilla (54%) and low in Barisal (17%), Kushtia (19%) and Bogra (15%). Waiting for SMC persons were high in Barisal (48%), Sylhet (47%), Dhaka West (32%), Comilla (30%) and Kushtia (30%) and were low in Mymensingh (3%), Khulna (5%), Rajshahi (13%) and Bogra (15%).

5.1.2 Stock Out During Last Six Months and Average Stock Out Duration

The respondents were asked to know either the outlets experienced out of stock of SMC products during last six months. More than three-fourth of the pharmacy experienced stock out during last six months preceding the survey. Similarly, four out of ten non-pharmacy outlets also experienced stock out of SMC products. Observing into areas, majority respondents from Comilla, Sylhet, Barisal, Kushtia and Rajshahi reported stock out of SMC products and lower percentage of respondents from Bogra experienced stock out.

However the study also recorded the average stock out duration for each SMC brands. It can be seen that average stock out duration of Femicon, Nordette-28 and Minicon was 8, 6 and 15 days respectively for pharmacy outlets. On the other hand, average duration of stock out for these three brands at non-pharmacy outlets were 12, 16 and 17 days. Average stock out duration of condoms irrespective of brands, it ranges between 6 to 10 days at pharmacy outlets. Similarly at non-pharmacy outlets it varies between 6 to 14 days. Findings also showed that the stock out duration of ORSaline N was 4 days for pharmacy and 7 days for non-pharmacy outlets. However, the stock out duration of ORSaline Fruity was 3 days for pharmacy and 11 days for non-pharmacy outlets.

5.1.3 Reason for Not Selling ORS/Condom

The respondents who did not sell any ORS/Condom were asked to know the reasons for not selling the ORS/Condom. The few number of respondents from pharmacy outlets reported that they did not sell any brand of ORS/Condom. Among them unanimously mentioned sales representative did not offer to keep these brands. On the other hand, respondents from both urban and rural non-pharmacy outlets reported that there was pharmacy shop/medicine shop near by, followed by products are not running/lack of demand. Other responses were due to shame for fathers/brothers, small shop/poor capital and sales representative did not offer to keep this.

5.2.1 Time of Last Purchase

Knowing the last purchase time for its brands is important for SMC to plan the visit of the SOs to a market and both to the retailers and stockists. The last purchase events at weekly, fortnightly, monthly, 3 monthly and 6 monthly internals has presented in the following table. The following table shows the percent of pharmacies and non-pharmacies buying different SMC brands within past six months according to metro, urban and rural. It can be seen from the following table that majority of the pharmacy and non-pharmacy purchased OCP during last one month.

Table 5.1: Percent of Outlets Buying Different Brands Within Past One Month

(Fig. in %)

Products/Brands	Pharmacy			Non-pharmacy		
	Metro	Urban	Rural	Metro	Urban	Rural
Femicon	93.6	93.1	93.7	75.0	87.3	84.2
Nordette-28	94.0	93.9	93.2	80.0	76.1	85.5
Minicon	80.5	84.3	83.9	100.0	55.0	61.3
Marvelon	97.3	90.4	92.2	100.0	100.0	83.3
Hero	91.1	84.9	89.3	64.5	84.5	85.2
Panther	93.9	93.2	92.1	81.6	85.0	80.3
Sensation Classic	95.6	94.9	93.7	86.7	89.0	93.0
Sensation Mint	92.6	92.3	87.3	75.0	86.7	91.7
Sensation Strawberry	96.7	92.3	86.7	88.9	85.0	95.0
U&ME Long Love	93.2	92.5	84.4	100.0	73.3	90.0
U&ME Anatomic	93.9	89.4	77.5	100.0	71.4	63.6
ORSaline-N	97.3	96.7	96.7	90.5	95.5	94.6
ORSaline Fruity	93.1	90.6	90.1	100.0	87.1	87.8
ORSaline	100.0	90.0	90.9	100.0	91.8	85.3
Tasty	95.7	95.6	96.7	97.5	93.8	93.4

N=Those who were currently selling above products

5.2.2 Source of Last Purchase from SMC Sales Officer/Executive

Source of last purchase of SMC brands were asked to the respondents for each brand available in the outlets at the time of the survey. In a single outlet the source varied for different product for different reasons. The following table explains the source of last purchase were SMC Sales Officers. Data shows that Sensation variant and U&ME variant mostly purchased from SMC personnel. About half of the outlets purchased SMC products from SMC personnel. Other sources were nearby stokiest outlet of same market, nearby whole sale market and others.

Table 5.2: Last Purchase was from SMC Sales Officer by Brands, Area and Outlets

(Fig. in %)

Product/ Brand	Pharmacy			Non-pharmacy		
	Metro	Urban	Rural	Metro	Urban	Rural
Femicon	40.1	46.0	30.1	43.8	44.9	45.0
Nordette-28	44.7	56.6	43.1	20.0	65.2	60.3
Minicon	52.9	51.3	34.7	20.0	61.1	61.3
Hero	57.8	68.7	59.7	67.7	68.0	71.8
Panther	40.3	51.2	43.8	50.0	46.9	60.5
Sensation Classic	58.5	61.5	58.2	66.7	64.0	82.5
Sensation Mint	62.7	75.4	73.9	33.3	66.7	75.0
Sensation Strawberry	43.3	67.4	63.9	44.4	60.0	85.0
U&ME Long Love	66.7	88.6	81.3	33.3	100.0	100.0
U&ME Anatomic	76.1	85.4	84.8	50.0	78.6	100.0
ORSaline-N	48.9	57.5	44.3	32.5	34.8	45.2
ORSaline Fruity	64.4	71.5	66.7	28.1	75.4	55.4

N=Those who were currently selling SMC products

5.2.3 Quantity of Last Purchase

The last purchase quantity of the available SMC brands at the time of interview was asked following source of purchase. The quantity purchased was processed in three groups for all a) Less than one dispenser, b) 1-2 dispenser, and c) more than two dispensers. On an average around 1.5 dispenser of Femicon & Nordette-28 was purchased at a time by the pharmacy outlets. However, Mincon was purchased on average 1.9 dispensers. It is to be noted that availability of Minicon was lowest as compared to other SMC brand but they have purchased higher dispensers of Minicon at a time. Regarding condom around 50% to 60% purchased 1-2 dispensers and about 30% purchased more than 2 dispensers by the pharmacy outlets. ORS were purchased 3 dispensers including SMC and its competitor's brand by the pharmacy outlets. On the other hand, quantity of OCP, Condom and ORS purchased by non-pharmacy were lower at pharmacy. Most of the non-pharmacy purchased 1-2 dispensers of these brands. The summary findings has presented in the following Table.

Table 5.3: Distribution of Purchased Quantity of Major Products at Last Purchase at Pharmacy and Non-pharmacy Outlets

(Fig. in %)

SMC Brands	Pharmacy (All)					Non-Pharmacy (All)				
	<1 disp	1-2 disp	>2 disp	Avg. (disp.)	N	<1 disp	1-2 disp	>2 disp	Avg. (disp.)	N
Femicon	32.0	49.8	17.7	1.5	**1623**	19.2	73.2	7.5	0.9	**195**
Nordette-28	25.1	52.8	21.7	1.6	**1745**	11.2	79.2	9.6	1.0	**100**
Minicon	32.3	53.8	13.0	1.9	**903**	8.9	82.1	9.0	1.1	**45**
Hero	1.8	56.4	41.4	3.2	**471**	0.5	48.5	50.9	2.5	**649**
Panther	41.7	30.1	27.0	2.3	**1612**	31.2	33.7	35.1	1.7	**418**
Sensation Classic	3.6	51.1	44.4	2.8	**1239**	2.5	47.2	49.7	2.5	**155**
Sensation Mint	2.5	61.4	35.5	2.3	**422**	3.2	64.5	32.3	1.7	**30**
Sensation Strawberry	1.3	65.3	32.6	2.5	**495**	2.0	65.3	32.6	1.6	**45**
U&ME Long Love	2.4	60.3	36.5	2.4	**423**	-	75.0	25.0	1.5	**27**
U&ME Anatomic	1.3	61.5	35.6	3.2	**309**	-	74.1	25.9	1.6	**25**
ORSaline-N	0.2	28.3	71.2	3.2	**2130**	0.3	55.7	43.8	2.2	**2033**
ORSaline Fruity	2.1	51.0	46.2	2.7	**890**	3.0	72.6	23.9	2.1	**160**
Oral Saline	1.8	32.0	66.3	3.2	**222**	0.7	56.2	43.1	2.2	**128**
Tasty	1.0	52.5	44.5	3.2	**1100**	0.4	70.0	28.8	2.3	**1388**

5.2.4 Frequency of Visit by the SO:

The respondents were asked to know the frequency of visit by the sales officer. More than one-fifth of the pharmacy respondents reported that SOs met once in a week, 14% met once in a fortnight, 8% met once in a month, 41% reported that they did not follow any schedule and 10% mentioned that the sales officer never visited them. On the other hand, 12% of the non-pharmacy respondents mentioned that the SOs visited within a month, 23% mentioned that the SOs did not follow any schedule and majority (63%) reported that the SOs never visited to them.

5.2.5 Last Visit by SO:

Thirty five percent of the pharmacy respondents reported that SO visited them within a week followed by 18% within two week, 15% within a month, 26% within more than a month and the rest did not know. Similarly, 25% of the non-pharmacy respondents reported that SO visited them within a week and within two week each, 18% within a month, 23% within more than a month and the rest could not mention the date of last visit.

5.2.6 Schedule of Market Visit by the SOs:

The respondents were asked to know about the particular visiting schedule of SOs. Forty five percent of the pharmacy and only 13% of the non-pharmacy respondents reported that SOs maintained particular visiting schedule. However, 41% of the pharmacy and 23% of non-pharmacy respondents mentioned that the SOs did not follow any particular visiting schedule and other reported that the SOs never visited (pharmacy: 10.4% and non-pharmacy: 63.4%) they did not know about the visiting schedule (pharmacy: 2.9% and non-pharmacy: 1.4%). Only nine percent of the respondents could recall the name of SMC Sales Officer.

5.3 Training Received:

SMC has been conducting training programs for the health providers for quite some years now. Yet, only 56% of the pharmacy providers reported that they have received training by the SMC. There is no noticeable regional variation on ever attending at SMC training program. Those who have attended, among them 60% attended once, 27% attended twice and rest attended thrice. There is no variation was observed according to the region.

5.4 Ways Proposed by the Respondents to Ensure Better Supply of SMC Products:

One fifth of the pharmacy outlets and about one third of the non-pharmacy outlets are satisfied with the current distribution system of SMC. When asked about their suggestions with regard to improvement of supply situation, quite a good proportion of outlets (25% pharmacies and non pharmacies) opined to increase the number of sales people in the current system. Nearly 13% of all outlets owner/salesman recommended adding third party distribution system to the existing one.

Increasing the frequency of visit of the SOs was another recommendation, which came out strongly (13.3% pharmacies). It is observed that the preferred frequency of SOs visit is once or twice in a week is essential to ensure better supply of SMC products.

Table 5.4: Preferred Distribution System by the Retailers

(Fig. in %)

Ways Proposed to Ensure Better Supply of SMC Products	Pharmacy			Non-pharmacy		
	Urban	Rural	All	Urban	Rural	Total
To continue company's current distribution system	22.1	19.5	20.8	34.2	33.6	33.9
To continue company's current distribution system and increase the number of sales people	26.4	23.2	24.8	25.3	24.7	25.0
To continue company's current distribution system and add third party distributors	12.1	12.6	12.3	12.5	12.7	12.6
Only third party distributors	2.4	2.7	2.6	3.4	4.6	4.0
Two times supply in a week	9.0	7.3	8.1	5.3	2.4	3.8
Supply once in a week	13.5	13.1	13.3	7.2	5.3	6.2
Supply twice a month	6.4	12.8	9.6	5.5	8.7	7.1
Supply once in a month	.9	3.3	2.1	2.5	1.7	2.1
Direct supply by company sales person	1.6	.9	1.3	.7	1.9	1.3
Maintain scheduled visit for supply	1.5	3.3	2.4	1.1	1.6	1.3
Direct supply on credit	1.3	.7	1.0	.4	.2	.3
Direct supply by sales person to all types of outlets, small or large	.6	.8	.7	.4	.3	.3
Loose sales	.4	.2	.3		.1	.1
Without tag sales	2.9	1.7	2.3	.1	.1	.1
No comments	.9	.9	.9	2.2	2.5	2.3
N	1200	1200	2400	2400	2400	2400

5.5 Competitors' Reaction:

All pharmacy and non-pharmacy retailers were asked whether the competitor brands of SMC condoms and ORS provide them any additional incentive to push their products. Only 12.6% reported that they get extra business incentive to sell SMC competitive products. To the retailers who responded that they received additional incentives, the single most important reason for pushing competitor products is a higher trade margin than SMC offers (93%). For the small fraction of retailers (7%) left, major incentives are various promotional gifts (T-shirt, mug, bowl etc.) product bonus and credit purchase.

5.6 Display/ Visibility of POP Materials in the Outlets

The available SMC brands and specific POP materials (Sticker, Dangler & Poster) were examined for visibility in all the outlets both pharmacies and non-pharmacies. Although the product visibility was high, the visibility of POP materials was low. In 66% to 75% of outlets were found product dispensers hanging on the wall. Among the POP materials, calendars were seen at 7.2% of the pharmacies and 2.7% of the non-pharmacies.

Conclusions and Recommendations

The Penetration Study 2007 for SMC has revealed such salient findings as with regard to the availability of SMC products vis-à-vis competitive products in all pharmacy and non-pharmacy outlets nationally, current stock levels, frequency of stock outs, co relation between SMC SO visit and availability of products, competitors' reaction on trade incentives and the visibility of SMC products and promotional items. The study also covered the retailers' preference on the suitable distribution modules with a view to improving consistent and satisfactory availability of SMC products. The study findings should be valuable for SMC to assess the current distribution strength of the company and devise strategies to address gaps and weaknesses in order to improve sales performance.

The study has found 90 brands of ORS in the market as compared to 31 in 2003 and 87 brands of condoms compared to 46. In the face of increasing completion especially in the mentioned categories, SMC may consider undertaking Penetration Study more frequently, preferably every year.

Availability of competitive brands, especially in the OCP and ORS market, has increased significantly, almost catching up with SMC penetration. SMC should give special focus in increasing penetration of its products in rural markets and urban pockets. Special focus should be given on condom and ORS penetration into non- pharma outlets.

It is evident that SMC's current distribution system is strong enough. We have mostly noticed a decreasing availability in relation to lesser frequency of visit by SOs. To face future challenges SMC should consider either increasing the number of sales people and thereby increase the frequency of the sales calls or add a parallel third party distribution support system with focus to cover the outlets where the SOs can not pay frequent visits. A combination of both the strategies may result in a much improved penetration status and a reduction in the number of stock outs.

The availability of Femicon was found to be lower than that of Nordette 28. This indicates either short supply of the product or lack of enough reach of the product to the retail level. SMC should find more information on the smooth movement of the product throughout the channels. Retail distribution should be increased to reach a more expanded coverage. The average increased open market selling price (about 14 Tk.cycle) reported by the retailers also supports the supply difficulties.

Specially to increase the penetration of SMC's flavored ORS Fruity SMC may think of introducing trade incentives such as product bonus or any other suitable promotion.

Product visibility at outlets was found satisfactory. However, the visibility of promotional items in the outlets for SMC products is poor. Merchandising efforts should be intensified to increase visibility.

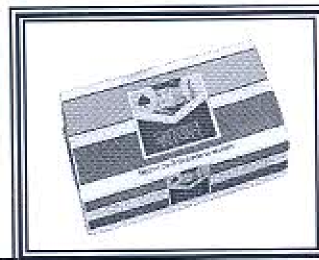
Annex-1

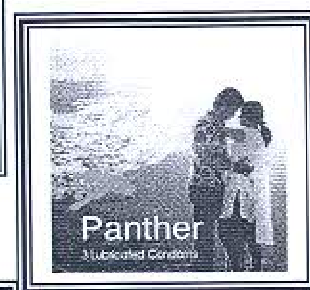
List of OCP Brands recorded in the Study along with major available Brands' Photo Gallery:

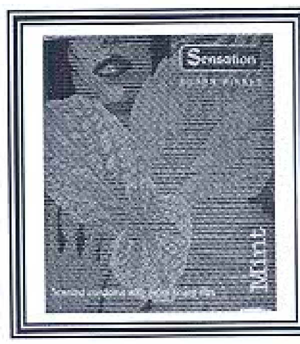
Sl. No.	Recorded OCP Brands
1	Femicon
2	Nordette-28
3	Minicon
4	Marvelon
5	Ovostat
6	Ovostat Gold
7	Lyndiol
8	Sukhi
9	Nordette (Wyeth)
10	Postinor
11	Minulet
12	Cylast
13	Desolon
14	Emcon

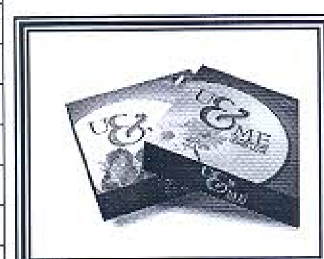

List of Condom Brands recorded in the Study along with major available Brands' Photo Gallery:

Sl. No.	Recorded Condom Brands
1.	Raja
2.	Hero
3.	Panther
4.	Sensation Classic
5.	Sensation-Mint Flavor
6.	Sensation-Strawberry
7.	U&ME Long Love
8.	U&ME Anatomic
9.	Nirodh
10.	Nirapad (GOB)
11.	Carex (Dotted)
12.	Carex (Ribbed)
13.	Feeling (Dotted)
14.	Feeling (Ribbed)
15.	Sure
16.	Hot Short
17.	Two Heart
18.	Skinless skin-003
19.	Urotica (Dotted)
20.	XIBE
21.	Wild Cat
22.	Erose
23.	Durex
24.	U Faula (USA)
25.	Hon dam
26.	Night Fight
27.	Safe Love Dotted
28.	Romance (Plain)
29.	Romeo
30.	Kam Suttro
31.	Passion
32.	Twin lotus
33.	Green Love Dotted

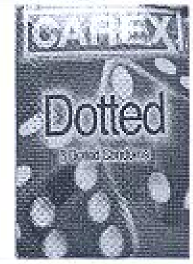


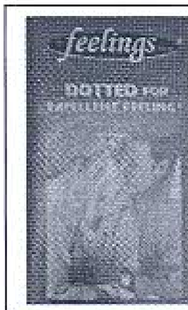


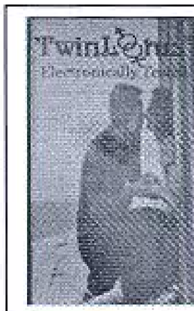




Sl. No.	Recorded Condom Brands
34.	Green love Super
35.	Titanic
36.	Honeymoon Night
37.	Urotica (Plain)
38.	TTK lig
39.	IPPF- India
40.	Sweet sixteen
41.	Hard Cover
42.	Four Season Ultra Thin
43.	Four Season Dotted
44.	Love Nest
45.	Smile Condom
46.	Kaman Tex
47.	Partner
48.	Freedom
49.	Long lasting
50.	Roman Tex
51.	German King
52.	Arum
53.	Care Condom
54.	Tiger
55.	Long Love
56.	Bo-Night
57.	Satisfaction Lady Condom
58.	Memory Dots
59.	Love Ground
60.	Love Guard
61.	Love Mits
62.	Super Think
63.	Fair
64.	Deslox
65.	XX
66.	Sensation Dotted
67.	Extra Tome
68.	G-Love
69.	Carex Assorted Flavour
70.	3X
71.	Super Rabbit
72.	Care Dotted
73.	Freedom Safety



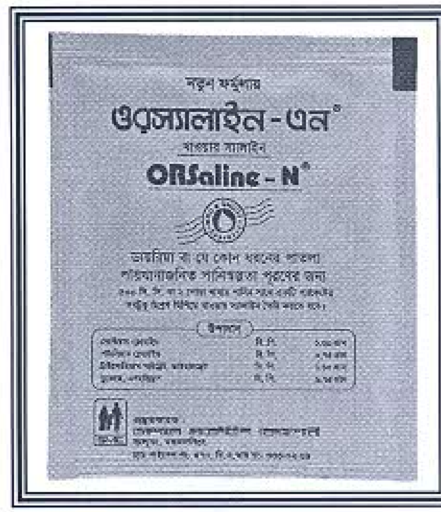


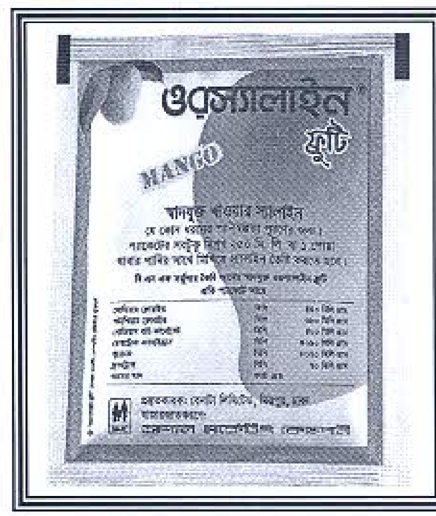


Sl. No.	Recorded Condom Brands
74.	Freedom Dotted
75.	Freedom Color & Smile
76.	Heart Cover
77.	Shurokkha
78.	Joy
79.	Xibel
80.	Moods
81.	Love nest Rabbit
82.	Aram Dotted
83.	Love Nest Dotted
84.	Sweet Heart
85.	Deluxe Together
86.	1st Night
87.	Orchid

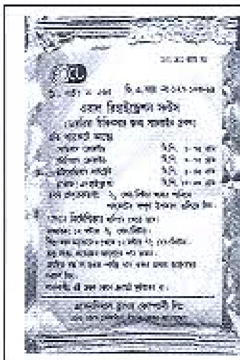
List of ORS Brands recorded in the Study along with major available Brands' Photo Gallery:

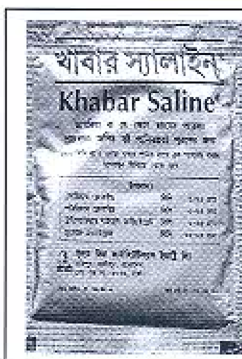
Sl. No.	Recorded ORS Brands
1.	ORSaline-N
2.	ORSaline Fruity_ Orange
3.	ORSaline Fruity- Mango
4.	APC Pharma Saline
5.	Gano_Shashtha ORS
6.	Oral Saline (Universal)
7.	Tasty Saline (Universal)
8.	Tasty Saline (Ashraf)
9.	Tasty Saline (Buds)
10.	Tasty Saline (Elite)
11.	Tasty Saline (Max)
12.	BRAC Saline
13.	Gaco-Oral Saline
14.	Khabar Saline (IBN Sina)
15.	Nutri-Rice Saline
16.	ICDDR,B Rice Saline
17.	Saline-R (Reneta)
18.	Saline-Plus (Reneta)
19.	Jiska Saline
20.	Hope Saline
21.	Rice – GSS
22.	Oral Rehydration Salt
23.	Saltoral
24.	R-Saline (Repco)
25.	Medimate ORS
26.	BCI
27.	OSA (Allcord)
28.	Tasty (EIK Camical)
29.	Dolit
30.	Oral Pac
31.	Tasty – GSS
32.	Drug Saline
33.	Medistar
34.	Tasty – GSS
35.	Rice (Century Health)
36.	Opso Saline

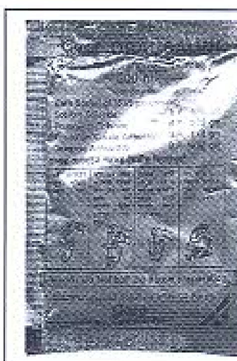




Sl. No.	Recorded ORS Brands
37.	Oral-D
38.	Neo Saline
39.	Nova ORS
40.	Testy RAG
41.	Noro ORS
42.	Uni Saline IBN Sina
43.	Hali Saline
44.	Oral-T
45.	Testy –Isopgul
46.	Move ORS
47.	Orsaline-M
48.	Orsaline-S
49.	Testy Saline- Food Division BD
50.	Testy Saline-Rafa Food
51.	Testy Saline- Pacific Welcome Ltd
52.	Ziska Oral
53.	C-ON Orange Flavor- Rupco
54.	R- Saline Fruity
55.	Testy –K… Chemical Co.
56.	Oral Energy Drink
57.	Rice (GPL)
58.	Oral Rehydration Salts
59.	Testy (Nion)
60.	Oral saline (Buds)
61.	Testy Saline (Sajib)
62.	Testy (DFP)
63.	Oral Saline (Dhaka Foods)
64.	Oral Saline (ASA)
65.	Testy Saline (ASA)
66.	I –Boral Saline
67.	Lili-P
68.	Saline ARA
69.	Pharma Saline
70.	Testy Saline Acgem
71.	Spry Testy Saline
72.	MomoTesty Saline
73.	Fresh Testy Saline
74.	Oral Saline RKA







Sl. No.	Recorded ORS Brands
75.	Testy Saline Star Com
76.	Alfa Saline
77.	Oral Saline – Medicon
78.	Testy Saline --
79.	OSA Fruity-N
80.	Oral Mas Food
81.	Oral Saline (Indo-Bangla)
82.	Rig Saline
83.	ARA Oral Saline
84.	ORS Medisco BD
85.	Elite Testy
86.	North Bengal
87.	Testy Uttara
88.	Testy Iron
89.	Testy Saline-Shara
90.	Testy –UK food