



Dydrogesterone Market In India: Shifting Prescriber Trends, Evolving Gynecologist Mindset, Innovator Setbacks, The Rise Of Generic Competition, And Strategic Outlook

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Abstract: The Indian progestogen market is undergoing a significant transformation, marked by a dynamic interplay between innovator brands, the rapid emergence of generics, and evolving prescribing behavior among gynaecologists. Dydrogesterone, a synthetic progestogen traditionally dominated by Abbott's innovator brand Duphaston, has witnessed a dramatic shift in market dynamics following its patent expiry in 2021. With over 50 generic brands entering the segment within two years, the competitive landscape has broadened, creating both opportunities and challenges for stakeholders across the pharmaceutical value chain.

Abbott's Duphaston, recognised for its high-quality manufacturing in the Netherlands and robust clinical backing, retained its position as a market leader with an estimated ₹350 crore annual revenue in FY2023. However, the influx of cost-effective generics, produced locally by companies like Mankind, Zydus, Emcure, and others, has fueled a shift in gynaecologists' preference, particularly in Tier 2 and Tier 3 cities, where affordability and accessibility are paramount. Collectively, generics have captured approximately 42% of the dydrogesterone market, with combined sales surpassing ₹250 crore in just two years.

This market evolution is further influenced by multiple forces. On one hand, gynecologists in urban centers continue to favor innovator brands for their superior clinical outcomes in high-risk pregnancies and infertility treatments. On the other hand, the rise in patient load, pricing sensitivity, and growing influence of field representatives are pushing many gynecologists toward adopting generics, especially in volume-driven practices.

The prescribing mindset of gynecologists is now shaped not only by clinical efficacy but also by economic realities. Gynecologists are strategically balancing trust in quality with patient affordability, often incorporating both innovator and generic brands in their treatment portfolio. This dual approach reflects the broader shift from a "quality-centric" to a "value-centric" healthcare delivery model in India.

Manufacturing standpoint, dydrogesterone synthesis remains complex, particularly for generics, which often lack the sophisticated stereochemical processes that define Duphaston. While this poses quality and consistency challenges for generic manufacturers, many have scaled production through aggressive pricing, wider distribution, and brand proliferation. manufacturing incentives, and brand positioning. The

overall market behavior is now driven by a nexus of clinical science, commercial strategies, regulatory compliance, and behavioral economics.

This review aims to map the current landscape of dydrogesterone prescription in India by analyzing sales data, gynecologist surveys, brand comparison metrics, and conceptual models. It highlights how the shift in prescriber psychology, patient demand, and pharma competition is redefining the future of progestogen therapy in gynecology.

Index Terms - Dydrogesterone, Progestogen Market, Innovator vs Generic, Gynecologist Prescription Trends, Progestin Therapy, India Pharmaceutical Landscape, Market Access Strategy, Hormonal Therapy in Gynecology, Bioequivalence, Reproductive Health, Prescription Behavior, Healthcare Economics India, Brand Erosion and Generic Surge

I. INTRODUCTION

Progestogens are a cornerstone of hormonal therapy in gynecology, playing a vital role in the management of various conditions such as luteal phase deficiency, infertility, recurrent pregnancy loss, endometriosis, and threatened miscarriage. Among the available progestogens, dydrogesterone has earned a unique position due to its selective activity, excellent safety profile, and broad clinical utility. For over a decade, Duphaston, the innovator brand from Abbott, has dominated the dydrogesterone market in India, largely due to its international manufacturing standards and robust clinical backing.

The expiration of Duphaston's patent in 2021 triggered a significant market shift. The Indian pharmaceutical landscape saw an aggressive surge of generic dydrogesterone brands, with over 50 products launched within a span of two years. This has redefined the competitive dynamics of the market, reducing entry barriers for local players and triggering a battle between quality perception and cost competitiveness.

Gynecologists across India are facing a complex decision-making environment. While Duphaston continues to enjoy trust in high-risk pregnancy and infertility protocols, the widespread availability and affordability of generics have made them increasingly popular in both urban and semi-urban clinical settings. This shift is not merely economic—it also reflects a broader evolution in physician mindset, influenced by patient affordability, pharma engagement strategies, and a growing focus on value-based care.

This review aims to explore these changing dynamics through a detailed analysis of dydrogesterone's prescription trends in India. By examining market data, sales performance, brand positioning, gynecologist perspectives, and a conceptual framework, the article provides a comprehensive view of how innovator brands and generic entrants are shaping the future of progestogen therapy in India.

II. MARKET OVERVIEW: INDIA'S EVOLVING PROGESTOGEN LANDSCAPE

The Indian pharmaceutical market is one of the fastest-growing globally, with a unique blend of affordability-driven innovation and volume-led expansion. Within the hormonal therapy segment, **dydrogesterone** has emerged as a key molecule, particularly in reproductive and maternal health. The Indian dydrogesterone market has seen exponential growth over the last five years, but the most significant transformation has occurred post-2021, following the patent expiry of Abbott's Duphaston.

Pre-2021: Innovator Dominance

Before the entry of generics, Duphaston held an almost monopolistic position in the dydrogesterone segment, commanding a market share of over 95%. It was imported from Europe (The Netherlands), and its strong clinical credentials helped it secure the trust of gynecologists across metro cities and infertility clinics. The molecule itself was perceived as niche and premium—used primarily for high-risk pregnancy, luteal phase support in IVF, and recurrent miscarriage.

Post-2021: Generic Boom

The landscape changed drastically after the molecule went off-patent. Between late 2021 and 2023:

- 50+ generic brands of dydrogesterone were launched in India.
- Companies such as Mankind, Zydus, Emcure, Akumentis, Torrent, Alkem, and others quickly entered the market.
- The total dydrogesterone market size rose to over ₹600 crore (FY2023), with generics contributing nearly ₹250–₹275 crore within two years.
- While Duphaston still retains ~58% share, its dominance is being eroded month-on-month by price-aggressive alternatives.

Price War and Market Fragmentation

The average MRP of Duphaston is ₹90–₹100 per tablet, while generics are priced between ₹35–₹50, making them significantly more accessible for the middle-income and rural patient base. This pricing gap, combined with aggressive promotional strategies and wide field force deployment by Indian pharma companies, has resulted in increased generic adoption—particularly in Tier 2 and Tier 3 towns.

Geographic Segmentation

Market Tier Innovator Dominance Generic Growth

| | | |
|---------------|--------|-----------|
| Metro Cities | High | Moderate |
| Tier 2 Cities | Medium | High |
| Tier 3/Rural | Low | Very High |

While Duphaston maintains dominance in IVF clinics and tertiary hospitals, generic brands are seeing faster volume growth through retail prescriptions and general gynecology clinics.

The dydrogesterone segment is now a battleground for value vs. legacy, with innovator brands leaning on their clinical trust and consistency, while generics compete on reach, volume, and price. This makes the Indian progestogen market a unique case study in post-patent dynamics in women's health therapeutics.

III. COMPARATIVE BRAND ANALYSIS: DUPHASTON VS. GENERIC DYDROGESTERONE

The post-patent phase of the dydrogesterone market in India has created a highly competitive environment where over 50 brands are vying for market share. While Abbott's Duphaston continues to be the gold standard, generic entrants have gained rapid traction due to affordability and aggressive field marketing. This section compares the innovator and generics across critical performance and perception parameters.

Key Comparison: Duphaston vs Generics

| Parameter | Duphaston (Abbott) | Generic Brands |
|-----------------------------|--|--|
| Launch Year | 2008 (India) | 2021–2023 (post-patent) |
| Manufacturing Origin | Imported (The Netherlands) | Locally manufactured in India |
| Price Range | ₹90–₹100/tablet | ₹35–₹50/tablet |
| Market Share (2023) | ~58% | ~42% (combined) |
| Monthly Sales | ~₹29–30 crore | ₹40+ crore (combined for top 10 players) |
| Clinical Backing | Extensive; multiple trials & global approval | Limited; some lack robust bioequivalence data |
| Brand Trust (Gynecologists) | High, especially in IVF, recurrent pregnancy | Varies widely; depends on physician experience |
| Field Force Size | Moderate, focused on KOLs and metros | Aggressive pan-India push in all segments |

| Parameter | Duphaston (Abbott) | Generic Brands |
|-----------------------|---|---|
| Portfolio Integration | Often monobrand or part of a premium offering | Frequently bundled in hormone or gynae product ranges |

| Practice Type | Preferred Brand Type |
|-----------------------------|-------------------------------|
| IVF Clinics | Duphaston |
| High-Risk Pregnancy Centers | Duphaston |
| Semi-Urban General Practice | Mix of generics and innovator |
| Tier 3 Gynae Clinics | Mostly generics |

Brand Adoption by Practice Type

The Indian hydrogesterone market has bifurcated into premium-quality vs. price-volume strategies, each serving different clinical and economic segments. While Duphaston holds strong in critical care, generics are capturing market share through scale, reach, and cost efficiency.

IV. GYNECOLOGIST MINDSET & PRESCRIPTION BEHAVIOR: THE SHIFT FROM QUALITY-CENTRIC TO VALUE-CENTRIC DECISION MAKING

The shift in the hydrogesterone market has not only impacted prescription trends but also redefined how pharmaceutical companies—both innovators and generic players—position themselves strategically. While the patent expiry of Duphaston opened the floodgates for generic competition, it also created a complex battleground of perception, pricing, quality, and reach.

Challenges Faced by the Innovator (Duphaston / Abbott)

- 1. Price Erosion**
 - Duphaston is nearly 2x the cost of most generic alternatives. This limits its accessibility among economically sensitive patient populations, especially in non-metro regions.
- 2. Volume Drop in General Practice**
 - In lower-risk or routine cases, doctors are shifting to generics, leading to a drop in volume sales for the innovator brand outside the IVF and high-risk segment.
- 3. Field Force Fatigue**
 - Limited ground presence compared to local companies. Generic players are deploying 3–4x larger field teams with higher touchpoints.
- 4. Perceived as Premium**
 - Duphaston is sometimes viewed as “out of reach” by retail pharmacists and smaller clinics, despite its strong efficacy.
- 5. Import Dependency**
 - Being manufactured abroad, supply logistics, pricing fluctuation, and regulatory controls on imports pose ongoing risks.

Challenges for Generic Companies

- 1. Quality Consistency**
 - Manufacturing hydrogesterone involves complex stereochemical processes. Not all companies meet consistent bioequivalence standards.
- 2. Clinical Skepticism**
 - Top-tier specialists remain hesitant to switch, especially in sensitive cases like IVF or threatened miscarriage.
- 3. Brand Clutter**
 - With over 50 brands in the market, brand differentiation is minimal, leading to price wars and frequent substitution.

4. Regulatory Oversight

CDSCO and state FDA authorities are increasing scrutiny on manufacturing claims and batch testing of hormonal drugs.

Opportunities for Innovator Brands

- **Reinforce Brand Equity**

Leverage strong KOL support and clinical data to maintain dominance in critical gynecology segments.

- **Introduce Tiered Offerings**

Consider launching a local or branded-generic version of dydrogesterone to capture middle-income segments.

- **Digital Engagement**

Invest in digital CME, webinars, and e-detailing to build an emotional and scientific connection with younger gynaecologists.

Opportunities for Generic Players

- **Volume-Based Growth**

Tap into rural and Tier 2/3 cities with affordable packs and bundled hormonal therapy offerings.

- **Product Innovation**

Introduce extended-release (ER) or combination packs (e.g., dydrogesterone + folic acid) to differentiate.

- **Doctor-Pharma Alignment**

Build long-term partnerships with clinics through diagnostic support, sample programs, and localized CME initiatives.

The Indian dydrogesterone market presents a unique dual opportunity:

- **For innovators**, to solidify their high-trust positioning and educate physicians on quality outcomes.
- **For generics**, to scale rapidly by penetrating new geographies and building volume-led portfolios.

V. CONCEPTUAL FRAMEWORK: UNDERSTANDING THE SHIFT IN THE DYDROGESTERONE MARKET

The Indian dydrogesterone market is undergoing a structural transformation driven by three interlinked forces: market dynamics, prescriber mindset, and brand positioning strategies. Innovator brands like Duphaston have historically leveraged their clinical superiority and trust to dominate the premium segment. However, after the patent expiry, market accessibility, affordability, and wide field engagement by generic companies have redefined the competition.

This shift has led to a transition in gynecologists' behavior—from a quality-centric prescription model to a value-centric, segmented approach. Now, the prescription choice is often dictated by patient affordability, perceived risk of the case, and pharma rep engagement rather than only brand legacy. As generics aggressively push for volume through pricing and reach, innovator brands are being forced to adapt or risk marginalization in large-volume segments.

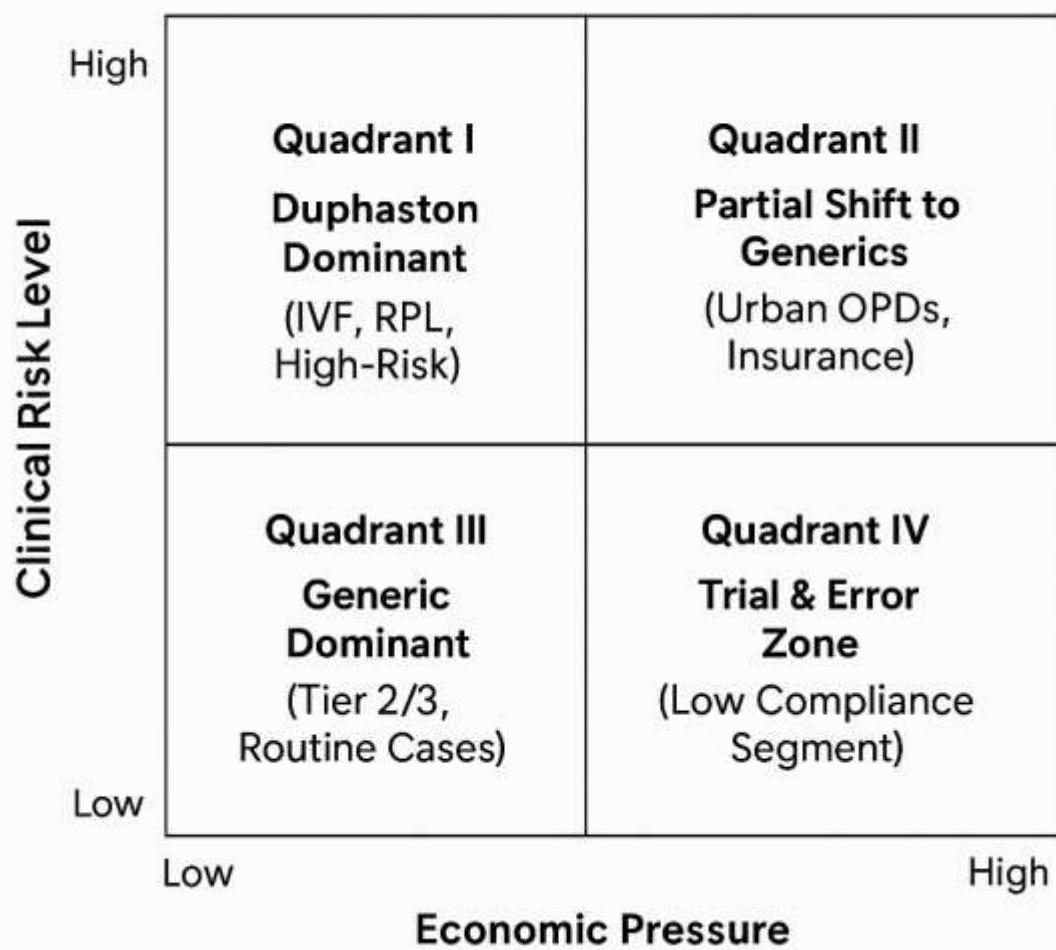
To map this complexity, we propose a four-quadrant conceptual framework that categorizes prescription behavior and brand strategy along two axes:

- **Clinical Risk Level** (Low → High)
- **Economic Pressure** (Low → High)

Interpretation

- **Quadrant I:** High clinical risk and low economic pressure – Duphaston remains dominant due to trust, reliability, and protocol inclusion (e.g., IVF, threatened miscarriage).
- **Quadrant II:** High clinical risk but high economic pressure – Gynecologists cautiously begin integrating generics based on patient affordability and drug availability.
- **Quadrant III:** Low clinical risk, high economic pressure – Generics dominate due to cost savings in routine hormone supplementation and general gynae care.
- **Quadrant IV:** Low clinical and economic threshold – Prescribers switch frequently based on offers, availability, or patient demand; brand loyalty is weak.

Conceptual Framework



This framework helps explain the **segmented brand strategy** adopted by gynecologists and offers strategic guidance to both innovator and generic players on how to position their products more effectively.

VI. CONCLUSION

The Indian hydrogesterone market is at a watershed moment, where clinical legacy, commercial disruption, and evolving gynecologist psychology converge to redefine the landscape of progestogen therapy. The post-patent scenario of Duphaston has not only intensified competition but has fundamentally shifted how hormonal treatments are positioned, prescribed, and perceived in everyday gynecological practice.

Duphaston, backed by decades of trust, international clinical trials, and advanced stereoisomeric purity, continues to be the preferred choice in critical, high-risk reproductive scenarios—such as recurrent pregnancy loss, IVF protocols, and hormone support in ART. However, this dominance is being increasingly tested by the rapid rise of cost-effective generics, many of which have successfully penetrated price-sensitive geographies and routine gynecological indications like luteal phase defect, irregular menstruation, and endometrial support.

The prescribing mindset of Indian gynecologists is no longer static or brand-locked. It has evolved into a multifactorial decision model, where treatment severity, patient affordability, perceived quality, and local availability all play critical roles. In urban, high-compliance setups, clinicians still prefer the reliability of innovator brands. Yet, in semi-urban and rural practice settings—where patient volumes are high and margins thin—generics are swiftly gaining ground due to their aggressive pricing, local promotion, and ease of access.

This shift underscores a broader movement from a quality-centric prescription culture (rooted in trust, clinical lineage, and imported reputation) to a value-centric prescription approach (focused on balancing efficacy with economic viability). Importantly, gynecologists are no longer monolithic in behavior—younger doctors are more open to experimentation, influenced by digital interactions, peer networks, and localized medical education.

The hydrogesterone market is expected to fragment further, but consolidation around a few high-performing generics is likely, especially those that invest in bioequivalence validation, local outcome data, and continuous engagement with clinicians. Simultaneously, innovator brands must reassert value through scientific education, real-world clinical support, and emotional branding to retain their foothold in premium therapy segments.

The hydrogesterone market is not just a case study in generic competition—it is a live model of how clinical trust, affordability, and behavioral economics interplay in a rapidly evolving healthcare system. The brands that will sustain leadership are not necessarily the ones with the deepest legacy or the lowest price, but those that can align with the real-world mindset of India's gynecologists—offering trust, value, and relevance in a single proposition.

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