

Hormonal Contraceptive Market Report by Product (Oral Contraceptive Pills, Intrauterine Device (IUD), Injectable Birth Control, Vaginal Rings, and Others), Hormone (Progestin-only Contraceptive, Combined Hormonal Contraceptive), Age Group (15-24 Years, 25-34 Years, 35-44 Years, Above 44 Years), End User (Hospitals and Clinics, Homecare, Ambulatory Surgical Centers, and Others), and Region 2024-2032

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Abstracts

The global hormonal contraceptive market size reached US\$ 18.7 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 26.1 Billion by 2032, exhibiting a growth rate (CAGR) of 3.7% during 2024-2032. The market is experiencing steady growth driven by global awareness of reproductive health and family planning, the rising empowerment of women, particularly in developing regions, and the growing acceptance and use of contraceptives across the globe.

Hormonal Contraceptive Market Analysis:

Major Market Drivers: The demand for hormonal contraceptives is driven by family planning requirements and acceptance across the globe. The various governments and non-governmental organizations that solely try to reduce the rate of unplanned pregnancies are leading to the growth of this market.

Key Market Trends: According to the hormonal contraceptive market forecast, the recent trend that will have a major impact on this market is the increasing consumption of long-acting reversible contraceptives including IUDs and

implants on account of being more effective and longer action period.

Geographical Trends: North America and Western Europe majorly lead in hormonal contraceptive usage due to high awareness levels, income, and healthcare facilities. On the contrary, Asia Pacific is anticipated to grow fastest due to urbanization, healthcare expenditure, and lifestyle factors.

Competitive Landscape: According to the hormonal contraceptive market research, the hormonal contraceptives market has several big pharmaceutical companies with extensive product portfolios and distribution networks. Both small and large companies are increasing their budgetary allocation to research and development (R&D) activities to develop new drugs with minimal side effects while maintaining consumer convenience.

Challenges and Opportunities: While the existence of cultural resistance and regulatory hurdles in various geographical areas constrain market growth, there remain multiple opportunities to invest in personalized contraceptive solutions and focus on unaddressed emerging markets with an increase in female employment.

Hormonal Contraceptive Market Trends:

Increasing global awareness and education on reproductive health

The extensive utilization of hormonal contraceptives on a global scale is largely dependent on increased awareness and education about reproductive health. Governments and relevant international organizations, such as the World Health Organization, continuously promote the concept and advantages of family planning through safe and effective contraceptive use. According to the World Health Organization, there were 1.9 billion women of reproductive age worldwide in 2021, 1.1 billion of whom need family planning. Of these, 874 million are using modern contraceptive methods, and there are 164 million women with an unmet need for contraception. Thus, this is significantly influencing the hormonal contraceptive market revenue. Specifically, extensive global campaigns target both women and men, informing them about their ability to control pregnancies and effective ways to reduce rapid population growth. Moreover, numerous educational programs targeting teens and young individuals have been rolled out to lay the groundwork for well-informed family planning decisions later in life. These educational initiatives are only effective when

complemented by access to healthcare services and consultations that enable individuals to differentiate among various hormonal contraceptive methods. In this regard, comprehensive global educational and health programs are indispensable in ensuring these products are taken up in different regions.

Technological advancements and product innovation

The development of new and better hormonal contraceptive options that revolutionize the area also propels hormonal contraceptive market value. Recently, a novel ultra-low-dose preparation of 20 µg EE and 3 mg DRSP has been marketed in a 24/4 regimen (Yaz; Bayer AG). The efficacy is similar to, if not better than, older COCs, and the bleeding pattern is acceptable. Additionally, drug delivery system development is resulting in more reliable items that are simpler to manage and produce fewer side effects. Extended-cycle pills and improvements to intrauterine devices, such as fewer health hazards and a longer period of utilization, respectively, all address the increasing need for consumer convenience and lifestyle compatibility. In addition, such advancements enhance the consumer experience and compliance, resulting in an expanded market since women are more likely to use and resume contraceptive use. In addition, innovations in contraceptive product technologies take advantage of consumers' acquired interest and adoption and market choice to introduce more refined technologies. Therefore, this is creating a positive hormonal contraceptive market outlook.

Policy initiatives and funding for family planning

Policies, such as supportive government policies and increased funding for family planning programs, facilitate the hormonal contraceptive market growth. Several governments in various regions, particularly in developing countries, have passed policies to ensure that individuals have access to contraceptives as part of public health and women's empowerment measures. These policies lower the cost of contraceptives, make reproductive health services comprehensive and available to everyone, and incorporate contraceptive education in public health campaigns. Furthermore, global consortia and institutions offer funding to help underserved areas access reproductive health services. All these measures seek to reduce the cost and convince individuals to get contraceptives. Policies that guarantee easy and low-priced access to hormonal contraceptives help to meet public health needs and other socio-economic targets.

Hormonal Contraceptive Market Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on product, hormone, age group, and end user.

Breakup by Product:

Oral Contraceptive Pills

Intrauterine Device (IUD)

Injectable Birth Control

Vaginal Rings

Others

Oral contraceptive pills account for the majority of the hormonal contraceptive market share

The report has provided a detailed breakup and analysis of the market based on the product. This includes oral contraceptive pills, intrauterine device (IUD), injectable birth control, vaginal rings, and others. According to the report, oral contraceptive pills represented the largest segment.

Oral contraceptive pills (OCPs) continue to lead the hormonal contraceptive market as the largest product segment due to their unmatched combination of efficacy, convenience, and availability. The hormonal contraceptive market overview suggests that pills are the most common contraceptive method worldwide due to their safety, which secures predictable and reliable family planning. In addition to their reliability, the market for these products is diversified by the variability of formulations, with pills available in combined and progestin-only versions that reflect medical and consumer preferences. Moreover, the market tendency is determined by the price of OCPs in comparison with other long-term hormone-conjugated contraceptives, and the ease of documentation based on the long history of using OCPs that, despite the side effects, remain safe. In confluence with this, the segment is still developing, and many new options have been and continue to be developed to reduce the side effects and enhance the safety and comfort of hormonal formulations. Overall, contraceptive OCPs remain the premise of reproductive health for women worldwide.

Breakup by Hormone:

Progestin-only Contraceptive

Combined Hormonal Contraceptive

Combined hormonal contraceptive holds the largest share of the industry

A detailed breakup and analysis of the market based on the hormone have also been provided in the hormonal contraceptive market research report. This includes progestin-only contraceptive and combined hormonal contraceptive. According to the report, combined hormonal contraceptive accounted for the largest market share.

The hormone sub-segment is dominated by combined hormonal contraceptives (CHCs). The main factor contributing to the segment's high share is their very high contraceptive efficacy combined with significant health benefits. Among the beneficial effects, it is worth mentioning the guaranteed duration of the menstrual cycle and the severity of menstruation, the prevention of ovarian cysts, and the significant reduction in the risk of endometrial cancer. CHCs are available in the form of pills, vaginal rings, and patches, giving users an additional choice of the form of administration that is most convenient for them. Thus, CHCs are an attractive option for a wide range of users due to their great flexibility and additional health benefits. Among the concerns, some clinicians mention the risk of mood disorders and the likelihood of weight gain. However, ongoing improvements aim to decrease the risk of these side effects, enhancing user satisfaction and adherence.

Breakup by Age Group:

15-24 Years

25-34 Years

35-44 Years

Above 44 Years

15-24 years represents the leading market segment

The report has provided a detailed breakup and analysis of the market based on the age group. This includes 15-24 years, 25-34 years, 35-44 years, and above 44 years. According to the report, 15-24 years represented the largest segment.

The group of 15-24 years stands out as the largest segment of hormonal contraceptive users, based on identified trends in demographic distribution and social peculiarities. This age range usually refers to late adolescence and young adulthood, a period when individuals are most active in exploring and utilizing contraceptive options as part of their sexual and reproductive health management routines. In addition, the segment's considerable growth is driven by increased sexual activity among adolescents and young individuals, supported by broad educational programs that teach safe sex and promote the avoidance of unplanned pregnancies. Thus, this is also positively influencing the hormonal contraceptive market statistics. Educational institutions, healthcare providers, and community organizations pay special attention to this age group, conducting various outreach activities and consultations to make information about different methods of contraception more accessible. Similarly, the desire to build a career or complete education before starting a family also encourages these young individuals to seek adequate, secure, and reliable contraceptive options, contributing significantly to the strong representation of this submarket.

Breakup by End User:

Hospitals and Clinics

Homecare

Ambulatory Surgical Centers

Others

Homecare exhibits a clear dominance in the market

A detailed breakup and analysis of the market based on the end user have also been provided in the report. This includes hospitals and clinics, homecare, ambulatory surgical centers, and others. According to the report, homecare accounted for the largest market share.

The leading end-user in the hormonal contraceptive market is the homecare segment, driven by the convenience and privacy it offers. Given the current trend of consumers demanding to make their healthcare decisions from the comfort of their homes, the demand for products that can be self-administered was bound to increase. This trend is further facilitated by the fact that contraceptives have become more attainable than ever before. Oral pills, transdermal patches, and vaginal rings, for example, can now be utilized without anyone's help and are readily available on the market in most parts of the world. According to the hormonal contraceptive market analysis, many online platforms and telehealth services make access to these products easy, enhancing the appeal of managing contraceptive needs at home. Furthermore, the homecare trend corresponds to the overall developments in consumer-centered healthcare, whereby individuals are seeking optimal levels of convenience, confidentiality, and autonomy in attending to their health needs. These factors have significantly altered the dynamics within the hormonal contraceptive market.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America leads the market, accounting for the largest hormonal contraceptive market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America represents the largest regional market for hormonal contraceptive.

Geographically, North America is the leading market for hormonal contraceptives

globally due to the region's well-developed healthcare infrastructure, high awareness about contraceptive types, and strong government support. There are also several leading pharmaceutical companies in North America investing in the development of more convenient, effective, and safe contraceptives. At the same time, Americans are the most developed in terms of the culture of taking care of their health and they prefer to “swallow” an oral agent in advance rather than an intrauterine spiral. Additionally, many types of contraceptives are covered by insurance, including under policies, which enhance accessibility. Numerous educational programs provided by public and private organizations also inform about the benefits of using contraceptives. This comprehensive support ensures that North America is not only a large market but also a leading region in the global hormonal contraceptive space.

Competitive Landscape:

The market research report has also provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the major market players in the hormonal contraceptive industry include:

Afaxys Inc.

Agile Therapeutics Inc.

Allergan Inc. (AbbVie Inc.)

Bayer AG

Cipla Limited

Johnson & Johnson

Merck & Co. Inc.

Pfizer Inc.

Piramal Group

Teva Pharmaceutical Industries Ltd.

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

The major players in the hormonal contraceptive market are committed to funding research and enhancing the efficacy and safety of their products. They consistently reduce side effects and increase user convenience to gain market acceptance and keep quality leadership. Furthermore, firms including Bayer AG, Pfizer, and Merck & Co. want to extend their global footprint through acquisitions and alliances in developing countries, where the hormonal contraceptive demand is currently higher. Additionally, manufacturers frequently promote hormonal contraception and educate more women about the advantages associated. These developments support development goals while aiding more comprehensive public health policy goals.

Hormonal Contraceptive Market News:

April 25, 2024: Merck & Co. Inc. makes a statement of investing over ?300m (\$320.8m) to establish a new Life Science Research Center at its main office located in Darmstadt, Germany.

January 10, 2022: Agile Therapeutics, Inc. announced that it has entered into a new partnership with Afaxys Pharma, LLC to support the promotion of the Twirla® levonorgestrel and ethinyl estradiol transdermal system.

Key Questions Answered in This Report:

How has the global hormonal contraceptive market performed so far, and how will it perform in the coming years?

What are the drivers, restraints, and opportunities in the global hormonal contraceptive market?

What is the impact of each driver, restraint, and opportunity on the global hormonal contraceptive market?

What are the key regional markets?

Which countries represent the most attractive hormonal contraceptive market?

What is the breakup of the market based on the product?

Which is the most attractive product in the hormonal contraceptive market?

What is the breakup of the market based on the hormone?

Which is the most attractive hormone in the hormonal contraceptive market?

What is the breakup of the market based on the age group?

Which is the most attractive age group in the hormonal contraceptive market?

What is the breakup of the market based on the end user?

Which is the most attractive end user in the hormonal contraceptive market?

What is the competitive structure of the market?

Who are the key players/companies in the global hormonal contraceptive market?

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