Interview: Juan Pablo Udry – General Manager, Boiron Brazil & Latin America



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Juan Pablo Udry, general manager Brazil and Latin America at Boiron, the world's undisputed leader in homeopathic medicines, provides an insightful overview of the Brazilian and Latin American landscape for homeopathic products and documents Boiron's commitment to bringing a new alternative to physicians across the continent. He also describes the company's differentiated and successful market approach in Brazil and Latin America, as well as his expectations regarding the evolution of Brazil's regulatory framework for homeopathy.

You were appointed in July 2017 as general manager for Latin America & Brazil, almost two years after taking over Boiron's Brazilian operations. Given that some of the region's largest countries have recently experienced political and economic difficulties; can we say that Latin America is still a region of opportunities for a company like Boiron?

Totally! As you know, Boiron historically holds a strong footprint in Europe – and especially in France, Boiron's domestic market, where it proudly stands as the leading OTC player in the country. In this context, one of the company's key priorities over the past decade has been to leverage on its domestic leadership and its reputation in European markets to further developing its international presence.

With regards to the Americas, Boiron has already managed to establish solid businesses in the US and Canada while the company entered the Brazilian market about ten years ago. However, Boiron's operations in the rest of Latin America (outside of Brazil) were either very emerging or completely inexistent when I first joined the company three years ago, Colombia being an exception. As Boiron's fundamental mission and overarching commitment is to offer homeopathy as a prevention and treatment alternative to all physicians worldwide, the company decided to invest in the region and expand its Latin American reach.

In this endeavor, some specificities of the region have truly caught our interest, as the latter truly translate into great development opportunities for Boiron, the world's leading homeopathic company. First of all, Latin America holds a long-standing history and culture of using natural medicines – in the broadest sense of the term, encompassing homeopathy, phytotherapy, and other natural and alternative treatments. As a result, from a patient perspective, an eye-catching part of the region's population has already integrated homeopathy as an efficient prevention and treatment alternative. From a physician perspective, several Latin American countries – including Brazil – recognize homeopathy as a medical specialty *per se,* which requires following a two-year specialization program and whose practice is fully accepted by these countries' medical associations.

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Finally, Latin America is no exception to the global trend where patients and physicians alike are looking for less invasive and more natural prevention and treatment options, which could for example be integrated into mothers' and infants' daily lives without contraindication or high risks. The latter – as well as pediatricians – have actually emerged as Boiron's entry point in Latin American markets, as our company's portfolio boasts extremely well reputed products for mothers, pregnant women, and infants. Pregnancy typically narrows the number of safe prevention and therapeutic options at hand for women, which sharpens the attractiveness of homeopathic products in mothers' eyes. As a company, we are then trusted as the partner of choice of pregnant women, mothers and infants, and we are therefore able to expand this relationship throughout mothers' and infants' lives.

What does Boiron's current footprint look like in Latin America?

Brazil is so far the only Latin American market where we have a fully-fledged affiliate, as we work through distributors in other countries across the region. Although we already hold a broader portfolio in Brazil and Colombia, we entered other Latin American countries with a very focus

portfolio comprising only one or two products. Nevertheless, Ecuador and Chile have rapidly emerged as two very promising markets for Boiron, as our products have experienced very fast uptakes. In this regard, we have already decided to further enrich our local portfolios in these two countries.

Although natural products are seemingly well integrated into the Latin American medical culture, it is no easy task to provide physicians with a new therapeutic alternative through distributors. In this context, how do you go about conveying the specificities and subtleties of Boiron's homeopathic products?

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This aspect clearly stands as one of our main challenges we face in the region. However, Boiron's main distributor in Latin America is a world-reputed, innovative, global healthcare company that can leverage its outstanding reputation to accelerate the penetration of our products. In the meantime, the fact that this global player chose Boiron products also stands as an additional evidence of the trust and credibility given to our company.

Coming back to the educational challenges you mentioned, the first success factor is to meticulously select your partner, and then provide this partner's teams with the required level of training and support. These efforts are critical to ensure that Boiron Brazil and our partners are able to accompany non-specialized physicians as well as consumers and patients. In this regard, the main problem we face with homeopathy is that there is still a confusion between several natural therapies, including phytotherapy, antroposophy, and others. For consumers and not specialized doctors, the difference between these products is not clear enough yet, and this is exactly where we enter the picture: we must explain and elaborate on the specificities and inherent benefits that set these therapies apart from each other.

Furthermore, I want to highlight that our efforts are not exclusively outward looking, as strengthening Boiron's presence in Latin America also entails providing our own people with continuous training. Most of Boiron's employees in Brazil did not have an extensive knowledge of the homeopathy field prior to joining the company, so one of our objectives over the past three years has been to build up our company's in-house expertise and skills.

In this regard, what kind of professionals have you been hiring when building up Boiron's operations in Latin America?

We have assembled a rather diversified team with professionals coming from different parts of the pharmaceutical and healthcare value chain, including both OTC and Rx fields. Nevertheless, today, all Boiron's people share the same focus: the physicians.

Fundamentally, we consider that we hold a portfolio of Rx products, although Latin America's variety of regulatory landscapes means that our products can be registered as either Rx or OTC treatments depending on the country. Furthermore, Boiron's largest selling product Oscillococcinum (for flue like symptoms) is approved in some Latin American countries for prevention only, while in others it is registered as a prevention and treatment option. However, whatever this product's label is, our overarching approach remains the same: providing doctors with a new alternative for flue like symptoms.

Homeopathy is an old medicine created in 1796 by Samuel Hahnemann, but at Boiron we believe that it stands as the medicine of the future, so we must address the lack of awareness which homeopathy still suffers from in some countries. In this regard, our objective is not to change the mind of reluctant physicians: if the latter categorically refuse to test homeopathy products, there is nothing we can do about it. Homeopathy is not a medicine based on belief, as it is (unfortunately) often expressed.

We acknowledge that some physicians might have a different way of thinking than us, and we prefer concentrating our efforts on the doctors who are looking for natural, non invasive products to treat or prevent precise symptoms.

In November 2016, ANVISA joined the International Conference on Harmonization (ICH) alongside the US FDA, the EU EMA, and other leading regulators. While ANVISA's regulatory leadership has been praised by the pharmaceutical industry as a whole, what is your assessment of Brazil's regulatory framework for homeopathy products in particular?

ANVISA's worldwide recognition and stringent regulations play a significant role in accelerating Boiron's development in Brazil. Although we still face regulatory challenges and have to comply with somewhat lengthily approval timelines, ANVISA's reputation and world-class requirements also means that Brazil is a country where patients and consumers deeply trust the products approved by the market's regulator. To the contrary of other countries around the world, where less stringent regulatory requirements imply that products' quality and safety might be sometimes questionable, ANVISA's top-notch standards help us build up our products' credibility in the market. Just to give you an idea, registering a product in Brazil requires having the company's production facility

inspected and approved by the regulator, a demanding process that Boiron complied with.

On the other hand, some of ANVISA's regulations still prevent Boiron from selling products already available in other parts of the world. To unlock this situation, we are working more closely than ever with Brazil's regulator and strive to showcase to ANVISA the main specificities of homeopathy products, a field that does not stand as the agency's core area of expertise.

Brazil holds more than 5.000 compounding pharmacies [*or Pharmácia de Manipulação in Portuguese, which are pharmacies approved and entitled to produce homeopathy medicines – Ed*], which stands as a huge number. This truly proves that there is a strong demand for homeopathic products in Brazil, and our objective is to work hand-in-hand with ANVISA to ensure we can meet Brazil's healthcare needs in this area.

Beyond the regulatory aspect, how do you see Boiron's relationship with the country public sector evolving moving forward?

Once we will have established a stronger footprint in Brazil, the next step ahead will be to increase our collaboration with the Ministry of Health, with the objective to showcase how homeopathy products can prevent diseases from evolving into more costly stages or forms.

This undoubtedly stands as an ambitious, long-term objective, which will only become reachable if we first fulfill our current priorities: partnering with both the medical and regulatory stakeholders to entrench homeopathy products' use into Brazil's healthcare ecosystem. As a matter of fact, we believe that reaching this objective is evermore crucial in a country like Brazil, where millions of people live in mega-cities such as Sao Paulo and are therefore particularly exposed to symptoms generated by pollution or stress (due to traffic or safety issues, for example).

How has Boiron Brazil been performing over the past two years, and what do you identify as the main drivers behind the company's growth in the country?

We have been growing over the past three years at an average rate of 22 percent year-on-year, whereas Brazil was facing an unprecedented two-year recession period. These eye-catching results have been mainly driven by the great reception of our products by Brazil's medical community, especially pediatricians.

When I took over, we decided to focus our affiliate's strategy on pediatricians, which now make up 70 percent of all doctors visited by our teams. In Brazil, 90 percent of our sales come from three products – Oscillococcinum® (flue), Stodal® (cough), Sédatif PC® (anxiety and stress) – which have been extremely well received by pediatricians for the prevention of infants' flue (which makes

up 50 percent of our revenues in Brazil). During the first years of school, children typically go through a dozen of influenza episodes, which prompts their mothers to look for prevention options and help them better cope with high infection risks.

How do you strive to be innovative in the way you promote and market your products in Brazil?

At first sight, the way we operate in the market is very similar to all pharmaceutical companies in terms of KPIs, targeting, and volume of physician visits. However, as our therapeutic approach is different than the rest of the pharmaceutical industry, we want to make our physician visits different too.

When visiting doctors, Boiron's objective in Brazil is not just to promote products – but to ask them questions. In this regard, our key goal is to understand these physicians' specific needs and the problems they face in their practices. From these answers, we are then able to design and develop a product offering that is perfectly adapted to these doctors' needs.

Although Boiron Brazil has been pioneering this question-based approach, it still stands as a work in progress. As we continue developing our footprint in the country, we will tirelessly strive to improve this model where we operate as health consultants towards doctors – rather than as a typical pharmaceutical company.

Where would you like to see Boiron Brazil in the next five years?

It will truly depend on the evolution of the country's regulatory landscape for homeopathic products. A public consultation on homeopathic products was recently held by ANVISA, and we need to assess what will be its definitive impact. So far, one of the main issues at hand is that homeopathy products still follow the exact same registration requirements as any other Rx products. In this public consultation, ANVISA was however evaluating the opportunity to bring more flexibility to homeopathic products' regulatory pathway, which would ultimately speed up the overall market access process for natural, like Boiron's treatments.

This regulatory update combined with the fact that our global portfolio has already been approved in Europe for a long time could entail huge growth opportunities for Boiron in Brazil. As a matter of fact, we already discussed this potential regulatory update with Brazilian physicians, and the latter were really enthusiastic about the opportunity to swiftly access Boiron's full portfolio in the country.

If the current regulatory context is maintained, I however believe that we can still continue outperforming the Brazilian market and grow at an annual pace comprised between 15 to 18

percent within the next five years. However, if ANVISA’s regulations were eventually updated, we could probably double or triple the size of Boiron Brazil within the same period of time.

Although we remain relatively small in terms of sales, Brazil has already become a strategic market for Boiron, where some innovative, pilot projects are currently under development. Overall, we really feel that we receive a full support from France’s headquarters, which treat us as we were a significant market from a sales standpoint – which we aim to become in the near future. Looking at Latin America, our objective is to focus on pediatricians and general practitioners and launch our blockbusters across the continent. In the grand scheme of things, we are deeply convinced that Latin America will drive a significant share of the company’s growth moving forward.

Do you have a final message for our international readers?

Good health is our most precious possession, and our body requires the best treatments and products possible. In this context, I encourage all readers to give homeopathy a chance – regardless of your beliefs, you will be surprised!

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