

Keep your tummy healthy, all year round

Pharmaceutichesky Vestnik, May 2017 #18

Pharmaceutical market overview for the ATC group A07B, intestinal adsorbent medicinal products¹ in the retail commercial sector of the pharmaceutical market, based on the results of the II quarter 2016 - I quarter 2017.

The summer is coming, with the joy of walking outdoors in the nature, which everyone missed so much during the long winter months, when we used to sit comfortably at home rather than walking in cold weather, even along our favorite routes. The joy of the meeting with the joyous long-awaited summer is so great that all precautions are forgotten: tasty berries are eaten unwashed, appetizing but not always fresh snacks are bought on the beach, mushrooms gathered by enthusiastic but not always knowledgeable “mushroom hunters” find their way on the table. In order not to become a victim of food poisoning as a result, we should make an inventory of our home medicine kit in advance and check if it contains effective enterosorbents that will help in a difficult situation.

In seven-leagues strides

Based on the results of the 2nd quarter of 2016 to 1st quarter of 2017, the sales of intestinal adsorbent medicinal products in pharmacies amounted to 8.03 billion rubles², which meant that 0.11 billion packages were sold. The sales increased by + 4% in value and + 13% in packages (Figure 1).

The golden mean

One package of intestinal adsorbent product costs 80 rubles in pharmacies, on average. However, the buyer has a choice of a price range. Among the drugs that cost less than 100 rubles, more than 98% of the packages of the brand *Activated Carbon* were sold. *Smecta* has a share of almost 80% of all packages sold in the price segment from 100 to 200 rubles. *Polysorb* (in 25 g and 50 g packages respectively) is leading by volume in two price segments: 200 to 300 rubles and 300 to 400 rubles. *Enterogel* represents three out of four packages sold in the most expensive segment (Figure 2).

One third of the sales of adsorbent intestinal products belong to the INN of polymethylsiloxane polyhydrate; slightly less than one fifth, to the INN of activated carbon and dioctahedral smectite. Among the dosage forms, tablets rank first in sales by value, while pastes for oral administration rank second (Figure 3).

The fastest one

Among the TOP3 brands, almost half of the market belongs to the brand *Enterogel (TNK Silma)*, followed by *Activated Coal* (group of manufacturers), with *Smecta (Ipsen)* closing the list of the top three products (Table 1). At last, the consumers are abandoning old drugs based on activated carbon, their share in value decreasing by almost 10% with a decrease in sales of 32%. The consumers are choosing increasingly modern drugs. This trend is supported by manufacturers in their promotion campaigns. One of the brands has a motto: “*Polysorb* is 120 times more effective than activated carbon.” It is *Polysorb* that has the highest increase in sales both in value (+ 72%) and in volume (+63%), which is more than three times higher than its nearest competitor (Figure 4). This allowed *Polysorb* to climb one line higher in the ranking of enterosorbents, while other brands either kept their positions or moved down.

Enterosorbents used for treating food poisoning and intestinal infections encountered by people on summer vacations, operate with different efficiency. The most common causes of intestinal problems are dirty hands, food spoiled in the heat, pathogens of intestinal infection in lakes or rivers. Therefore, the sales of adsorbent intestinal drugs increase in proportion to the growth of intestinal disorders in the warm season.

TOP10 brands of medicinal products belonging to ATC group A078: adsorbent intestinal products, in value (rubles) in retail commercial segment of pharmaceutical market, MAT 1Q 2017

Rating Change in rating		Brand/Corporation	Share, %		Average price
MAT 1Q 2017	MAT 1Q 2017/ MAT 1Q 2016		MAT 1Q 2017	MAT 1Q 2016	MAT 1Q 2017
1	-	Enterogel (TNK Silma)	32.87	27.96	22
2	-	Activated carbon (group of manufacturers)	17.46	26.63	-32
3	-	Smecta (Ipsen)	14.66	14.44	6
4	-	Lactofiltrum (ABBA)	14.39	13.74	9
5	1	Polysorb (Polysorb)	9.58	5.80	72
6	-1	Filtrum-STI (ABBA)	6.59	5.95	16
7	-	Neosmectin (Pharmstandart)	1.97	2.45	-16
8	-	Enterodez (group of manufacturers)	1.75	2.05	-11
9	-	Polyfepan (Saintec)	0.58	0.75	-20
10	-	Ultra-adsorb (Lainko)	0.09	0.15	-36

Source: AlphaRM – Monitoring of retail sales of medicinal products in Russian Federation

Table 1

Key features of some brands of medicinal products belonging to ATC group A078: adsorbent intestinal products

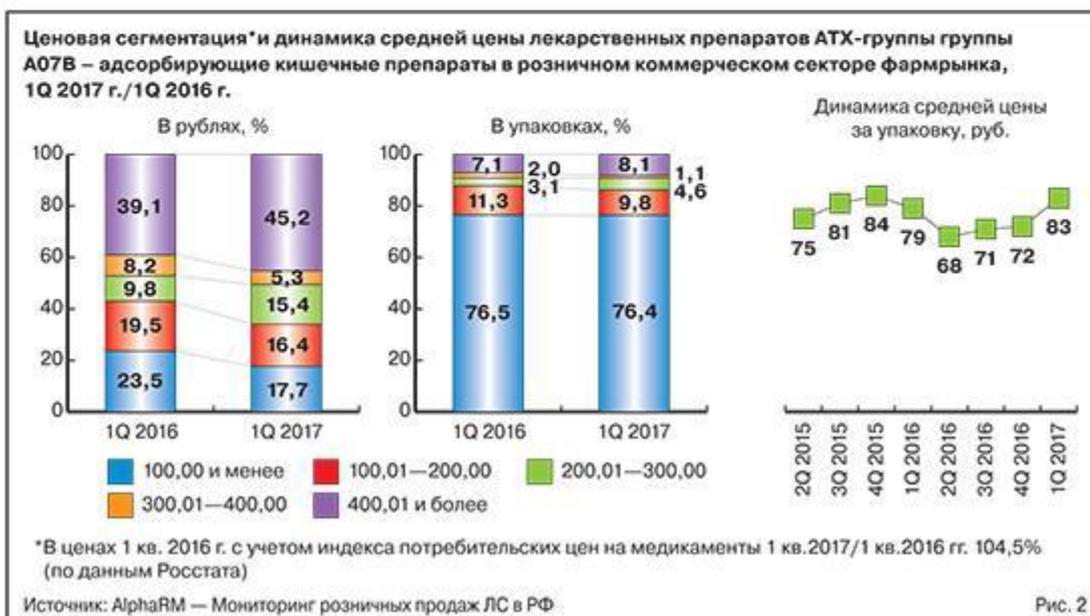
Brand	INN	Average effective single dose*	Additive: flavorings, sweeteners etc.
Polysorb	Silicium colloidal dioxide	3.5 g	None
Enterogel	Polymethylsiloxanopolyhydrate	22.5 g (paste) 15 g (gel)	Sweeteners E952, E954 (in sweet paste)
Smecta	Diocahedral Smectite	3 g	Flavorings and sugar
Filtrum-STI	Hydrolyzed Lignin	2 to 3 tablets	Povidon, natrium croscarmellose, calcium stearate
Lactofiltrum	Lactulose + Hydrolyzed Lignin	2 to 3 tablets	Magnesium stearate, natrium croscarmellose
Activated carbon	Activated carbon	1000 to 2000 mg (4 to 8 tablets)	none

* Dosages calculated for an adult person of 70 kg

Table 2

Source: State register of medicinal products, data from open sources





Enterosorbents differ in the following features:

- dosage form (powder, gel, tablets);
- strength (a course of treatment or a single dose);
- effectiveness (speedier effect, shorter duration of treatment);
- safety (the presence of additives that can cause an allergic reaction, side effects, traumatic effect of particles on the intestinal mucosa) (Table 2).





¹ According to the WHO classification.

² Hereinafter, retail sales from pharmacies are presented in the final consumer's prices (sell-out).