

# **The review of the Russian Federation's pharmaceutical market of medicines for the treatment of varicose veins of the lower extremities**

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**The review of the market of medicines for the treatment of varicose veins of the lower extremities in the Russian Federation's pharmaceutical market for the period from May 2016 to April 2017 (MAT 04/2017)**

**In summer heat, when the burden on the entire body, including the vessels of the legs, increases, venous blood flow may become obstructed, the blood stagnating in the lower extremities. There is a surge in sales of drugs for the treatment of varicose veins in this period (Figure 1). People come to pharmacies with complaints such as swelling, pain and heaviness in the legs, nocturnal cramps, thickening of the veins on the legs. In Russia, more than 30 million people suffer from various forms of varicose veins disease<sup>3</sup>. The prevalence of the problem contributes to the active development of the market for its treatments.**

## **Treatments from within**

According to the results of the period from May 2016 to April 2017, the volume of the Russian Federation's market of drugs for the treatment of varicose veins of the lower extremities amounted to 15.5 billion rubles in value<sup>4</sup> and 49.3 million packages in volume. The main sales channel is retail, accounting for 98% of all the sales in rubles and in packages. In the last observable period, the market was growing more actively than previously, finally showing positive trends in the growth of sales by volume (+ 2%), and the growth of sales in value that more than doubled compared to the previous period (+ 14%) (Figure 2). When comparing the sales of medicinal products for external and internal use, the following patterns can be observed: the sales volume of the products for external use (about 33% of the group sales in rubles, MAT 04/2017) and the trend of their development (-1% MAT04/2016 / MAT04/2015 and +0.2% MAT04/2017 / MAT04/2016 in rubles) are very modest compared to the drugs administered orally: their share amounted to 67% of the group's market volume in rubles for this period, and their increase in sales was ten times higher than for the drugs for external use (+ 11% of MAT04/2016 / MAT04/2015 and + 23% of MAT04/2017 / MAT04/2016 in rubles). This fact leads us to the conclusion that buyers are increasingly acquiring anti-varicose products for internal use, intended for pathogenetic therapy, preferring them to symptomatic treatments for external use.

**TOP10 brands of medicinal products for the treatment of varicose veins of lower extremities, in value (rubles) in Russian Federation's pharmaceutical market, MAT 04/2017**

Rating		Brand/Corporation	Share, %		Growth of sales MAT 04/2017 / MAT 04/2016	Average price MAT 04/2017
MAT 04/2017	MAT 04/2016		MAT 04/2017	MAT 04/2016		
a) products for oral use						
1	1	Detralex (Servier)	52.81	46.55	36	1,339
2	2	Venarus (FP Obolenskoye)	14.87	15.96	11	889
3	3	Flebodia (Innothera)	14.39	13.81	25	1,097
4	4	Troxevasin (Allergan)	7.06	9.15	-8	462
5	5	Ascorutin (Group of corporations)	3.11	3.78	-2	61
6	9	Flebofa (Atoll)	1.77	1.11	92	924
7	6	Escusan (Pharma Wernigerode)	1.60	1.94	-2	229
8	7	Antistax (Boehringer Ingelheim)	1.41	1.89	-11	1,369
9	10	Troxerutin Vramed (Sopharma)	0.70	0.93	-10	333
10	12	Troxerutin (Group of corporations)	0.57	0.48	41	212
TOP10			96.59	95.59	98.29	654
b) products for external use						
1	1	Troxevasin (Allergan)	44.06	45.29	-3	231
2	2	Lyoton (Berlin-Chemie/Menarini)	20.55	18.65	10	608
3	3	Heparin ointment (Group of corporations)	10.52	10.31	2	68
4	4	Hepathrombin (Stada)	5.76	5.85	-1	224
5	5	Venolife (Polpharma)	4.78	5.17	-7	423
6	6	Troxerutin vramed (Sopharma)	4.74	3.68	29	50
7	7	Troxerutin vetprom (VetProm)	3.53	3.26	8	45
8	9	Trombless (Stada)	2.48	2.02	23	315
9	8	Troxerutin (Group of corporations)	1.84	3.21	-43	46
10	10	Heparin-Acrichin (Polpharma)	0.72	1.02	-30	46
TOP10			98.97	98.47	1	155

Source: AlphaRM

Table

## The expensive migration

One package of the orally administered drugs for the treatment of varicose veins disease cost almost 650 rubles, and this price was actively growing throughout the observed period by almost 20% year-on-year. This growth was partly due to the emergence of higher dosages and package sizes of drugs in the market, with higher prices for a package. In the segment of the products for external use, the situation was quite stable, with the average price keeping at the level of 150 rubles during the last two years (Figure 3).

In terms of price segmentation, the most noticeable shift occurred in the price segment of 1500.01 rubles or more, mainly due to the brand *Detralex*, its average price increasing by 15%. This was due to the fact that about 30% of sales of SKU<sup>5</sup> *Detralex, film-coated tablets, 500 mg, No. 60* were attributed to the price range from 1000 to 1500 rubles in the previous period, while all their volume moved to a more expensive price segment currently, with almost 100% of this SKU sold at prices higher than 1500 rubles.

The following brands are leading in terms of sales in value, in their respective price segments<sup>6</sup>: *Ascorutin* (internal use) and *Heparin ointment* (external use) in the segment of 100.00 rubles or less; *Troxevasin* (both internal and external use) in the segment of 100.01 to 500.00 rubles; *Detralex* (internal use) in the segment of 500.01 to 1000.00 rubles and 1500.00 rubles or more, while the drugs for external use are almost absent from this segment; *Venarus* (internal use) in the segment of 1000.0 to 1500.00 rubles, with almost no drugs for external use in this segment.

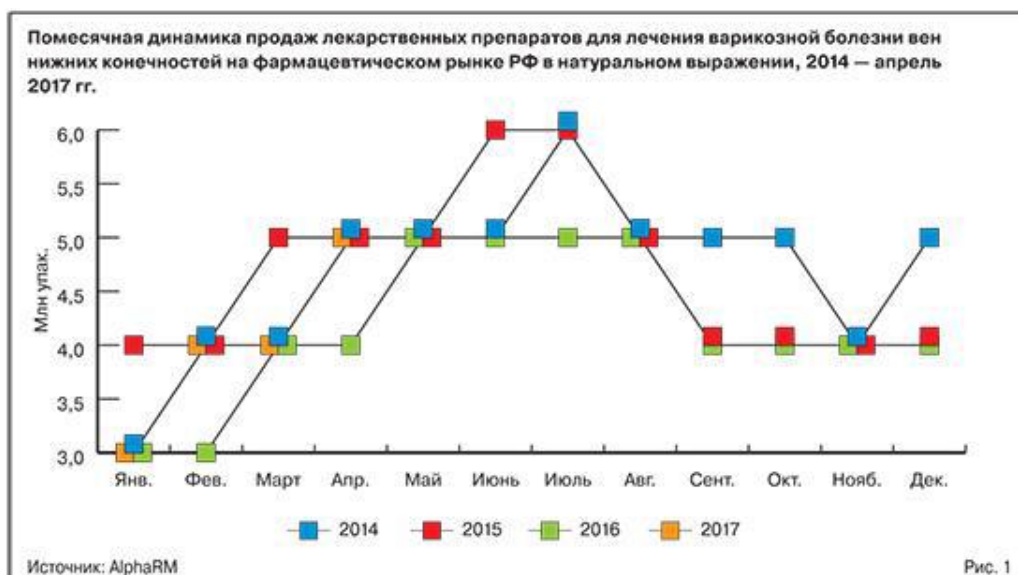
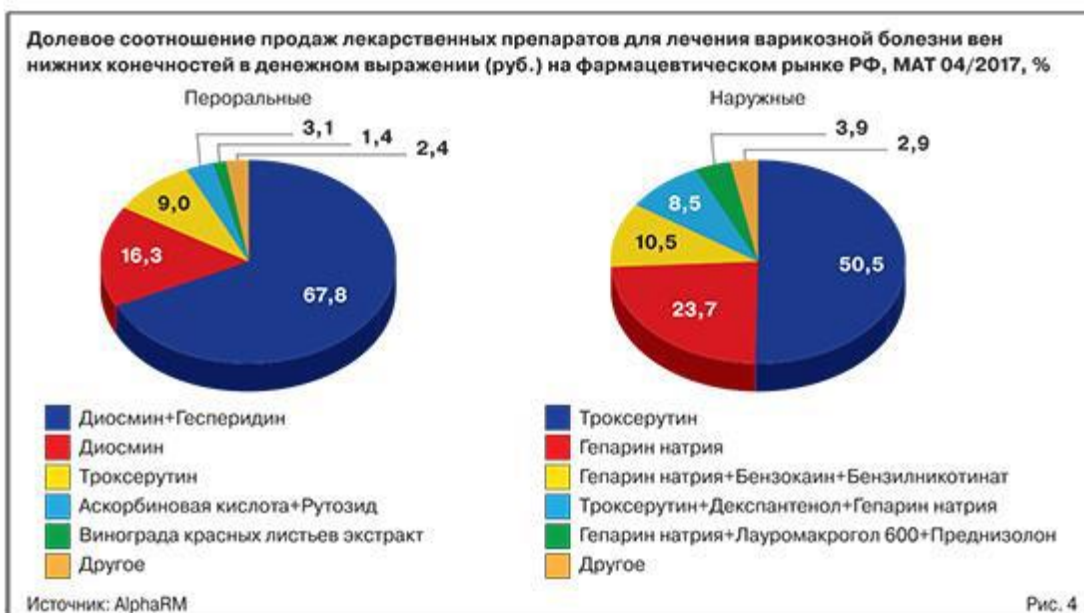
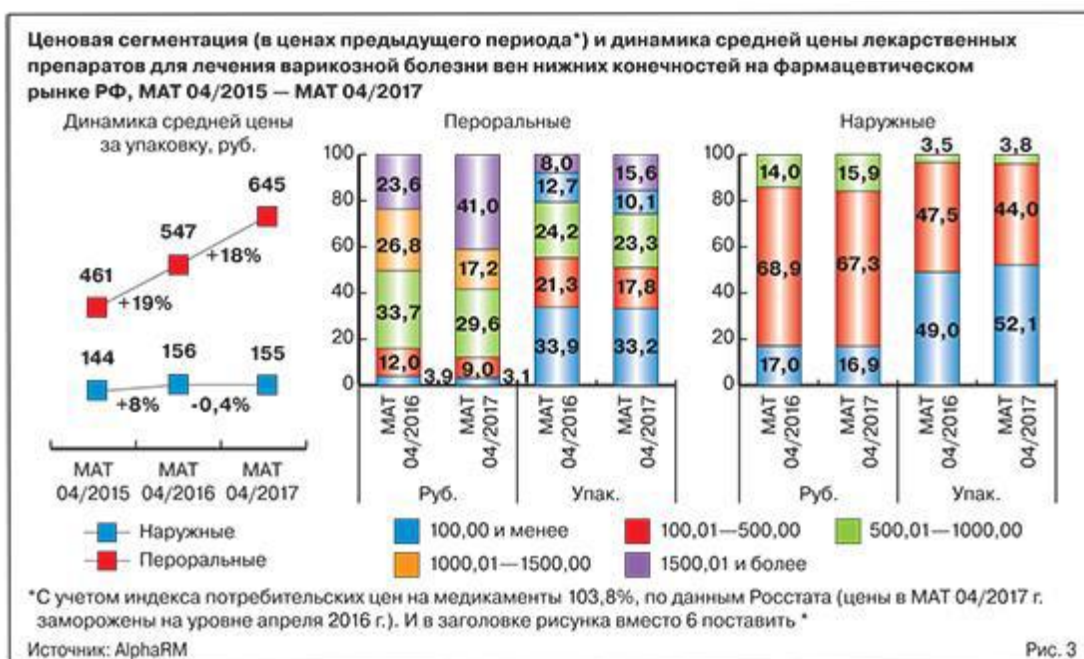


Рис. 1



Рис. 2



### One tablet does the trick

The INN Diosmine + Hesperidin ranks first in terms of sales by value, with an overwhelming market share among the orally administered drugs (Fig. 4). The drugs with this INN are based on bioflavonoids; they can restore blood microcirculation, relieve edema and reduce the severity of inflammation, improving the veins' elasticity. INN Diosmine + Hesperidin is represented by three brands. In the period from May 2016 to April 2017, this INN increased with a new product of 1000 mg dosage; Venarus offered it at the most affordable price of less than 1000 rubles for 30 tablets package, while the same packaging of Detralex was sold for a more than 1.5 times higher price. Diosmine single entity products rank second by sales volume in rubles among oral drugs; Troxerutine products occupy the third position but rank first among the external use drugs. The rating of external use INN, by volume, is continued by the products containing Heparin that prevents blood clots formation due to its anticoagulant effect.

### The Steadfast Five

Diosmine-containing products for oral use are keeping the first, second and third positions in the rating of brands for the treatment of varicose veins disease: Detralex and Venarus containing it in

combination with hesperidin, and a single entity diosmine drug *Flebodia*, containing only 600 mg of diosmine compared to 900 mg in *Detralex* and *Venarus*. *Venarus* has the lowest price for package among these brands. Among the brands for external use, Troxevasin, Lyoton, and Heparin ointment are leading (see Table).

## Summary

If a pharmacie's product range features the group of medicines for varicose veins of the lower extremities in summer, it contributes to a stable cash inflow due to the steady annual growth of demand for these products in July and August. The pharmacies should provide a sufficient stock of venotonics and venoprotectors, and also maintain a wide range of brands and products of this group. The most popular products will include those with a composition of the active substances tested and proved for years, convenient for use by final consumers and also affordable, such as the combination of diosmine and hesperidin, present in the market for about 10 years, at a dosage of 1000 mg allowing to take the drug just once daily, and at a democratic price offered by the brand *Venarus*.

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- 1) The review presents an analysis of two ATC groups: C05B for products for the treatment of varicose veins and C05C for products reducing the permeability of capillaries (according to the WHO classification), excluding injectable dosage forms.
- 2) MAT (from Moving Annual Total) - a floating annual sales amount for the last 12 months, namely the months from May 2016 to April 2017.
- 3) Khlevtova T.V. Optimization of parameters of endovenous laser obliteration with "hemoglobin-absorbing" radiation in the treatment of patients with varicose veins of the lower extremities. Moscow, 2012.
- 4) In the retail segment, the volume of sales from pharmacies in the final consumers' prices (sell-out) was taken into account.
- 5) SKU (Stock Keeping Unit) - commodity item identifier (item number), the inventory unit used in the commercial logistics to track the statistics on the sold goods; corresponds to the combination "brand + manufacturer + dosage form + strength + packaging."
- 6) The allocation by segments was based on the average price of a particular SKU, due to which representatives of one brand can appear in different price ranges.