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Review of the Vitamin Segment in the Russian Pharmaceutical Market in 2013-2017

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Abstract

This article presents the main trends related to the development of the segment of vitamins and vitamin complexes in the Russian pharmaceutical market over the past 5 years. The segment of vitamins and vitamin complexes of the Russian pharmaceutical market was assessed based on IQVIA company data (Retail audit, Budget audit, Reimbursement audit database). According to IQVIA, the market of vitamin-mineral complexes demonstrates a positive trend, having reached 47 billion rubles by the end of 2017 (in wholesale prices), which is about 7% of the total pharmaceutical market.

Keywords: vitamins, vitamin-mineral complexes, biologically active food additives, marketing research.

INTRODUCTION

The modern development of technogenic civilization led to environmental shifts in conditions of human existence and social changes in lifestyle. The negative impact of natural and anthropogenic factors causes the overload of protective mechanisms of the body, the development of stress-induced disorders, which in turn becomes the cause of the growth of such diseases as catarrhal diseases, SARS and influenza [1].

In addition to unfavorable ecological conditions, psychoemotional and physical stresses, changes in lifestyle and nutrition affect the resistance of the organism to pathogens.

The resistance of the organism to the effects of various unfavorable factors depends primarily on the speed and timeliness of the energy formation in the form of adenosine triphosphate (ATP). The energy formation processes are associated with the level and intensity of oxidation-reduction reactions that ensure the efficient use of oxygen. Under the influence of the physical, chemical, environmental and other factors, including drugs, the activity of redox enzymes reduces, resulting in the formation of insufficient amounts of ATP in the cell with a normal supply of oxygen, and free radicals and other toxic substances appear. Adverse shifts in energy metabolism are accompanied by symptoms of hypoxia, reduced mental and physical performance, and the functions of the brain, endocrine systems, heart, liver, kidneys and muscles [2].

To avoid causing additional adverse shifts in human energy metabolism, the vitamin-mineral complexes are usually prescribed together with the drugs or alone for the prevention of many diseases.

In the pharmaceutical market of Russia, the vitamin-mineral complexes are represented by drugs and biologically active food additives, which have usually one and the same composition. The main difference of a drug from biologically active food additives is in the dose. The drug has a therapeutic dose, which is higher than that of biologically active food additives since it includes a curative dose and a food one. Biologically active food additives contain a dose that covers only the daily nutritional need for vitamins and minerals [3].

The scope of our study was to conduct a market research of the vitamins and vitamin-containing complexes segment in the Russian pharmaceutical market.

METHODS

The methods of content analysis, system, logical, sociological, situational, and statistical analysis were used during the research.

RESULTS AND DISCUSSION

The vitamins' segment in Russian pharmaceutical market is represented by two large groups - the drugs and biologically active food additives, and by the end of 2017, it has amounted to about RUB 47 billion (in wholesale prices), which represents slightly less than 7% of the total market. Over the past 5 years, the segment has shown positive dynamics (32%) with the average annual growth of 6.2% (CAGR 2013-2017) (Fig. 1).

At the same time, the growth rates of the two segments (drugs and biologically active food additives) are the same. Against the background of the growth of the vitamin market in terms of value, the market in packages showed negative dynamics of -15% in 5 years (Fig. 2).

The trends between biologically active food additives and drugs are directly opposite. For 5 years, a group of drug vitamins showed a drop of -30% as opposed to vitamin additives with + 20%. This may be due to several factors: the transfer of some medicinal vitamin products into the category of biologically active food additives, the active promotional activity of producers, the product portfolio policy of pharmacy networks, etc.

The main vitamins' distribution channel (drugs and biologically active food additives) (97%) is the retail commercial market, due to the population.

The share of prescription medicines in vitamins and vitamin-containing complexes is about 20% both in physical and monetary terms. The prescription medicines are mainly presented in the form of ampoules and solutions for oral administration. Solid dosage forms (tablets, capsules) make up the largest share of about 78%.

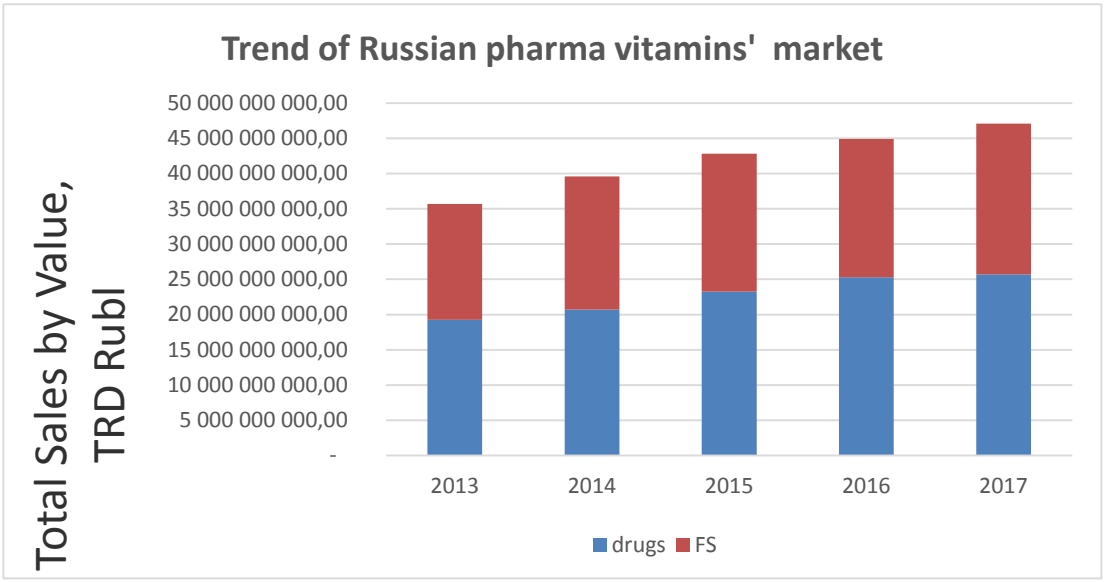
By the end of 2017, the average price of one package of vitamins (drugs) had been about RUB 125 (in wholesale prices), which was twice as expensive as in 2013.

By the end of 2017, the average price of one package of biologically active food additives (drugs) had been about RUB 140 (in wholesale prices), which was only 10% more expensive than in 2013.

The top 10 molecules of vitamins (in monetary terms) demonstrate stability, and the first four did not change in 5 years (Table 1). Of the leaders of 2013, only one INN/complex (NICOTINAMIDE*PANTOTHENIC ACID*PHOSPHORUS*PHYTOMENADIONE*POTASSIUM*PYRIDOXINE*RETINOL*RIBOFLAVIN*SELENIUM*THIAMINE*VITAMIN E*ZINC) was not included in the leaders of 2017.

Source: IQVIA databases (Retail, Hospital, Reimbursement, Regional reimbursement). Sales In Trd. RUB

Fig. 1. Trend of Russian pharma vitamins' market in 2013-2017 (sales by value, trd. RUB)



Source: IQVIA databases (Retail, Hospital, Reimbursement, Regional reimbursement). Sales In Trd. RUB

Fig. 2. Trend of Russian pharma vitamins' market 2013-2017 (sales by volume, units)

Table 1. Rating of molecules (grouped names) of vitamins for 2013-2017 by sales volume (trd. RUB) in the Russian pharmaceutical market

Top 10 molecules (drug) in rub.	rating 2017	rating 2013
MAGNESIUM*PYRIDOXINE	1	1
PYRIDOXINE*THIAMINE*LIDOCAINE*CYANOCOBALAMIN	2	2
COLECALCIFEROL*CALCIUM	3	3
ERGOCALCIFEROL*RETINOL*BIOTIN*CALCIUM*PHOSPHORUS*ASCORBIC ACID*MAGNESIUM*IRON FERROUS*NICOTINAMIDE*VITAMIN E* PANTOTHENIC ACID*ZINC	4	4
PYRIDOXINE*THIAMINE*CYANOCOBALAMIN	5	9
COLECALCIFEROL	6	11
COLECALCIFEROL*RETINOL*ASCORBIC ACID*CALCIUM*NICOTINAMIDE* PHOSPHORUS*THIAMINE*PANTOTHENIC ACID*PYRIDOXINE*VITAMIN E* MAGNESIUM*RIBOFLAVIN	7	8
ASCORBIC ACID	8	5
RETINOL*CALCIUM*MAGNESIUM*ASCORBICACID*PYRIDOXINE*RUTOSIDE* IRON FERROUS*MANGANESE*VITAMIN E*ZINC*NICOTINAMIDE	9	6
ASCORBIC ACID*BIOTIN*CALCIUM*COBALT*COPPER*CYANOCOBALAMIN* FLAVIN MONONUCLEOTIDE*IRONFERROUS*MAGNESIUM*MANGANESE* MOLYBDENUM*NICOTINAMIDE	10	7

Source: IQVIA databases (Retail, Hospital, Reimbursement, Regional reimbursement). Sales In Trd. RUB

The top 10 molecules of vitamins (in physical terms) demonstrate great dynamics - only the Top Three remained unchanged for 5 years. Of the leaders of 2013, only 7 remained in the rating of 2017 (Table. 2).

Table 2. Rating of molecules (grouped names) of vitamins for 2013-2017 by sales volume in physical terms (units) in the Russian pharmaceutical market

Top 10 molecules (drug) in packages	rating 2017	rating 2013
ASCORBIC ACID	1	1
ASCORBIC ACID*GLUCOSE	2	2
CALCIUM	3	3
PYRIDOXINE*THIAMINE*LIDOCAINE *CYANOCOBALAMIN	4	7
LAMINARIA DIGITATA*VITAMIN E	5	11
MAGNESIUM*PYRIDOXINE	6	14
RETINOL*VITAMIN E	7	4
VITAMIN E	8	5
RETINOL*ASCORBIC ACID*RIBOFLAVIN*THIAMINE	9	9
PYRIDOXINE	10	13

Source: IQVIA databases (Retail, Hospital, Reimbursement, Regional reimbursement). Sales In Trd. RUB

Top Ten (Table 3) drugs in terms of sales in rubles (wholesale prices) are represented by both Russian and foreign companies with minor changes for 5 years. Two new leaders - Russian MAGNELIS B6 and Polish AQUADETRIM VIT.D3 - entered the top ten.

Table 3. Trade Name rating of vitamins (drugs) for 2013-2017 by sales volume (trd. RUB) in the Russian pharmaceutical market

Top 10 Trade Names (drugs) in rub.	rating 2017	rating 2013	growth for 2013-2017
SUPRADYN	1	2	42%
MAGNE B6	2	1	2%
MAGNELIS B6	3	22	403%
ELEVIT PRONATAL	4	4	32%
MILGAMMA	5	3	9%
COMBILIPEN	6	7	109%
NEUROMULTIVIT	7	9	96%
AQUADETRIM VIT.D3	8	11	71%
COMPLIVIT	9	5	-12%
VITRUM	10	6	11%

Source: IQVIA databases (Retail, Hospital, Reimbursement, Regional reimbursement). Sales In Trd. RUB

Unlike the rating by sales volume in monetary terms, the rating of the most popular vitamins in physical terms is represented by the Russian "old" nomenclature, with an average price of less than 50 rubles per package (Table 4).

It is interesting to note that two Russian combined drugs COMBILIPEN and COMPLIVIT from one manufacturer Pharmstandart (currently OTCPharm) entered the ratings in both physical and monetary terms.

More changes are observed among the leaders of biologically active food additives (see Table). For example, in terms of sales volume (trd. RUB) only two trade names have kept their positions in the top ten since 2013 (LEONURI FORTE and DOPPELHERZ OMEGA-3). All the rest are new brands (Table 5).

The comparison of dynamics of the development of biologically active food additives and drugs in 5 years shows that the increase in biologically active food additives in the top ten is higher by an order than similar indicators for drugs.

Table 4. Trade Name Rating of vitamins (drugs) for 2013-2017 by sales volume in physical terms (units) in the Russian pharmaceutical market

Top 10 Trade Names (drugs) in packages	rating 2017	rating 2013	growth for 2013-2017
ACIDUM ASCORBINICU	1	1	-44%
ACIDUM ASCORB+GLUC	2	2	-43%
CALCIUM GLUCONATE	3	3	-54%
LIMANOVIT E	4	9	39%
COMBILIPEN	5	15	56%
REVIT	6	8	-20%
AEVIT	7	4	-63%
PYRIDOXINE	8	11	3%
TOCOPHEROL ACETATE	9	5	-58%
COMPLIVIT	10	7	-35%

Source: IQVIA databases (Retail, Hospital, Reimbursement, Regional reimbursement). Sales In Trd. RUB

Table 5. Trade Name rating of vitamin complexes (biologically active food additives) for 2013-2017 by sales volume (trd. RUB) in the Russian pharmaceutical market

Top 10 Trade Names (biologically active food additives) in rub.	rating 2017	rating 2013	growth for 2013-2017
FEMIBION NATALC.II	1	19	341%
DOPPELHERZ OMEGA-3	2	6	95%
INDINOL FORTO	3	170	1,910%
GLYCIN FORTE EVALA	4	21	214%
VITAMISHKI IMMUNO+	5	40	356%
FEMIBION NATALC. I	6	56	324%
UNIVIT KIDS	7		on the market since 2014(growth of 3,869%)
LEONURI FORTE	8	9	26%
ALI CAPS PLUS	9		on the market since 2016 (-42%)
LOVELAS FORTE	10		on the market since 2016 (-10%)

Source: IQVIA databases (Retail, Hospital, Reimbursement, Regional reimbursement). Sales In Trd. RUB

The most popular (rating by sales volume in packages) biologically active food additives also show more dynamic growth indicators (Table 6), despite the average price of packing in the top ten of 96 rubles, which is higher than the average price of packing for drugs (TOP 10 in vitamins) of 63 rubles.

Table 6. Trade Name Rating of vitamins (biologically active food additives) for 2013-2017 by sales volume in physical terms (units) in the Russian pharmaceutical market

Top 10 Trade Names (biologically active food additives) in packages	rating 2017	rating 2013	growth for 2013-2017
ASCORBINKA+GLUCOSE	1	2	66%
ACIDUM ASCOR+SUGAR	2	3	142%
GLYCIN FORTE EVALA	3	5	58%
ACIDUM SUCCINIC	4	10	139%
AC.ASCORB+GLUC ECO	5	18	221%
OL.JEC.MIRROLLA	6	287	5,047%
NATURINO	7	4	-12%
CALCIUM GLUCONATE	8		since 2015 (954%)
GLYCINE	9	127	1,436%
GLENVITOL W/GLUCOS	10	1	-70%

Source: IQVIA databases (Retail, Hospital, Reimbursement, Regional reimbursement). Sales In Trd. RUB

CONCLUSION

Thus, the analysis of the segment has shown that the market of vitamins and vitamin-containing complexes in the Russian pharmaceutical market demonstrates positive dynamics, having reached 47 billion rubles (wholesale prices) by the end of 2017, which is about 7% of the total pharmaceutical market. Non-drug assortment shows more dynamic development due to objective reasons (access to market, pricing, producer support, advertising, etc.). The policy of the state, aimed at supporting local producers, gave its results, and according to the results of 2017, half of the leaders of the analyzed segment are Russian producers. Restoration of the economy, disposable income of the population, liberalization of online trade with drugs in the next 5 years will become drivers of the vitamins' and vitamin complexes' segment.

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