MARKETING RESEARCH OF THE PHLEBOTROPIC DRUGS AT THE UKRAINIAN PHARMACEUTICAL MARKET

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Introduction. Nowadays, the prevalence of chronic venous diseases (CVD) is an actual medical problem in the world. About 70-80% of population in developed countries has some symptoms of CVD of lower extremities. Varicose veins, post-thrombotic disease and angiodysplasia are the main nosological forms of CVD of lower limbs. CVD is characterized by variety of symptoms, inhomogeneity of flowing and progression. The pathological process may begin in early childhood and due to progression may achieve severe stages until the disability of the patient. Even the initial stages of CVD significantly affect on patients' quality of life, they are accompanied by feelings of heaviness, pain and fatigue in the legs, and edema. High prevalence, progressive and often difficult flow of CVD course necessitate of its early detection and treatment.

Despite the high social and medical significance, as well as sufficient level of knowledge about the pathology of veins among medical and pharmaceutical community, the quality of its diagnosis and treatment remains insufficient all around the world. It is largely due to the fact that the significance of vein diseases is underestimated by society, patients, and medical community. It is believed that venous pathology does not create a threat to patients' life although the disease involving the lesions of deep veins can cause high mortality.

Aim. The aim of this study is to analyse market share and factors influencing the phlebotropic drugs market potential in Ukraine.

Matetials and methods. We used the data of the State Expert Center of the Ministry of Healthcare of Ukraine, namely the State Register of drugs, instructions for medical use of drugs, the audit data of the pharmaceutical market of the system «Pharmstandart» of the company «Morion».

Results and discussion. An important role in the prevention and treatment of CVD plays the level of provision of pharmaceutical market with modern, highly efficient drugs of domestic and foreign production. Recently, in domestic and foreign scientific literature much attention is paid to the medical aspects of phlebotropic drugs. At the Ukrainian pharmaceutical market 53 drugs with phlebotropic action are available. They are produced by 40 pharmaceutical companies from 11 countries. The phlebotropic drugs for systemic use are available in tablets, capsules, drops and injections medical form. Topical phlebotropic drugs are available in gel and cream medical forms. The share of domestic products is 43.4%, foreign – 56.6%.

The largest number of phlebotropic drugs (29 items, or 54.7%) belongs to the group C05C A «Bioflavonoids», which provides 83.3% of sales of phlebotropic drugs in physical terms and 66.7% in value.

The annual sales of phlebotropic drugs in the retail segment of Ukrainian pharmaceutical market is about 8.75 million packs or nearly 390 million grn. The drug Troxevasin®, Actavis Group, Iceland in gel form takes the leading position on the phlebotropic drugs market in physical terms of sales (annual sales of more than 2.3 million pcs.). The drug Detralex®, Servier, France takes the leading position in sales on monetary indicators (annual sales about 74.3 million grn.).

The Herfindahl-Hirschman Index of phlebotropic drugs market in Ukraine is 1,684.4, so this market segment is moderately concentrated. This is due the fact that this market segment has a lot of large players with significant market shares.

The phlebotropic drugs market potential in Ukraine is formed under the influence of many factors of general and specific character. Specific factors include common disease incidence of the population; the level and availability of medical and pharmaceutical care; the attitude to CVD problem of medical and pharmaceutical community and patients; the treatment methods; the compliance of patients; the appearance of new effective drugs. Among the factors favoring the development of venoactive drugs market in Ukraine can be named high number of CVD cases; the majority of female in demographic structure; considerable number of middle-aged and elderly people; the increase of conservative treatment tendencies of CVD etc.

The level of consumption of phlebotropic drugs in Ukraine and market potential of these drugs respectively is growing with implementation of pharmaceutical companies' educational programs for general practitioners and pharmacists; extension advertisement and propagation information materials about CVD and methods of their treatment in medical and pharmaceutical journals and popular websites and information given by medical (pharmaceutical) representatives, and other ways of promotion. Factors restraining the development of phlebotropic drugs market in Ukraine include low income level of the population; low level of CVD diagnostic; underestimation of CVD problems by general practitioners, pharmacists and patients; low level of the patients' compliance. Tendency of Ukrainian population to self-treatment and perception clinical symptoms of CVD as aesthetic problems results in irrational use mostly the topical phlebotropic drugs, cosmetics and special dietary supplements.

Conclusions. At the Ukrainian pharmaceutical market there is a wide range of phlebotropic drugs. The group C05C A «Bioflavonoids», in particular foreign products Troxevasin® and Detralex® plays a leading role in the formation of market potential. We assessed the degree of monopolization of the market and described the specific factors influencing the phlebotropic drugs market potential.