

# **ANALYSIS OF FACTORS AFFECTING HEPATOPROTECTORS' MARKET CAPACITY IN UKRAINE**

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In Ukraine, medical and social factors influencing the widespread consumption of hepatoprotectors include the high prevalence of acute and chronic viral hepatitis, toxic and drug-induced liver disease, alcoholic liver disease, non-alcoholic fatty liver disease among the Ukrainian population. Marketing factors of high hepatoprotectors consumption are formed due to the aggressive policy of their promotion on the domestic market by pharmaceutical manufacturers. In particular, measures to promote hepatoprotectors include their active advertising in medical and pharmaceutical journals, funding of research and publications, active product promotion in the media, the work of medical representatives with doctors and pharmacies and other types of promotion. These measures significantly affect the high level of prescriptions of hepatoprotectors by doctors, recommendations of pharmacy staff, as well as the use of hepatoprotectors for self-treatment by the population of Ukraine.

The purpose of this work is to analyze the dynamics of hepatoprotectors market capacity in Ukraine and factors affecting on it.

Among hepatoprotectors, the most active advertising campaign on television is carried out in relation to "Essentiale". In 2019 it ranked seventh in the ranking of drugs according to EqGRP (Equivalent Gross Rating Points). EqGRP characterizes the intensity of television advertising. In 2017–2018, "Essentiale" ranked third in a similar ranking. In 2019, more than 11.2 thousand advertisements of "Essentiale" were made on television.

In addition to advertising in the media, drug manufacturers use other means of promoting hepatoprotectors. Thus, according to the analytical system of market research "PharmXplorer" / "Pharmstandard" of the company "Proxima Research", in 2019 drugs "Hepabene" and "Essentiale" were among the thirty drugs that received the most mentions of pharmacists about promotion through visits of medical representatives. These drugs ranked sixth and fourteenth in the respective rankings.

In January-May 2020, "Carsil" entered the ranking of the 10 best drug brands in terms of EqGRP (2.5%) and 5.8 thousand TV commercials and took sixth place. Another hepatoprotector, "Antral", took the tenth position with an EqGRP of 2.0% and a number of commercials of 8.2 thousand.

The market capacity of hepatoprotectors in Ukraine is undergoing constant changes (table). The total growth of the hepatoprotectors' market for three years in 2014-2017 was more than 24.41% in physical terms and more than 102.27% in monetary terms. According to the marketing research company SMD, in 2018 the

market capacity of the therapeutic group of hepatoprotectors was UAH 905.8 million, and in 2019 — UAH 936.4 million (a decrease of 3.37% compared to the previous period).

*Table*

**Dynamics of hepatoprotectors market segment capacity in 2014-2019**

| Period | Market segment capacity                     |                                    | Increase in market capacity, % |                            |
|--------|---------------------------------------------|------------------------------------|--------------------------------|----------------------------|
|        | in physical terms,<br>number of<br>packages | in monetary terms,<br>thousand UAH | in physical<br>terms, %        | in monetary<br>terms,<br>% |
| 2014*  | 6 348 851                                   | 546 369,43                         | —                              | —                          |
| 2015*  | 6 766 697                                   | 861 231,13                         | 6,58                           | 57,63                      |
| 2016*  | 6 684 165                                   | 906 433,63                         | -1,22                          | 5,25                       |
| 2017*  | 7 898 394                                   | 1 105 117,85                       | 18,17                          | 21,92                      |
| 2018** | —                                           | 936 358, 32                        | —                              | —                          |
| 2019** | —                                           | 905 831, 78                        | -13,36                         | -3,37                      |

\* According to the analytical system of pharmaceutical market research «PharmXplorer»/«Pharmstandart» of the «Proxima Research» company

\*\* According to the marketing research company SMD

In 2019, the decrease in the market capacity of hepatoprotectors is observed both in monetary terms and in physical terms. Experts attribute this decline in hepatoprotectors' consumption to unusual climatic conditions and a favourable epidemiological situation in the fourth quarter of 2019, as hepatoprotectors are often prescribed to restore the liver after treatment with antibiotics and other antimicrobial drugs. In 2019, "Heptral", manufactured by Abbott Lab., Switzerland and "Essentiale forte H" manufactured by Sanofi, France were among the top twenty drugs in the retail segment of the pharmaceutical market in terms of money (10<sup>th</sup> and 18<sup>th</sup> position in the ranking). At the same time, the market capacity of each of these drugs decreased by about 14% in monetary terms. The decrease in sales in the hepatoprotectors' market is due to the active flow of these drugs in the segment of dietary supplements. Some hepatoprotectors ("Heparsil", "Livientale Forte", etc.) were registered by pharmaceutical companies as dietary supplements, which provided manufacturers with certain advantages and additional opportunities in their promotion on the pharmaceutical market.

Despite the numerous medical, social and marketing factors that contribute to the growth of the market capacity of hepatoprotectors, competition from dietary supplements leads to a decrease in the capacity of the hepatoprotectors' market.