





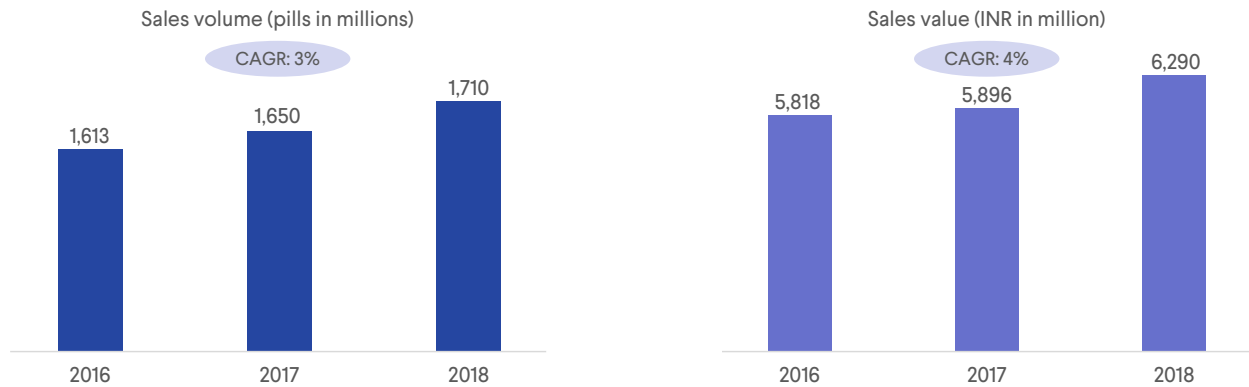
Antihypertensive Drugs Market Factsheet



This factsheet gives an overview of the private sector antihypertensive drugs market in Kerala over 2016-2018 and its trend by volume, value, per capita sales, preferred drug classes and molecules to support strengthening of the hypertension control program in the State.

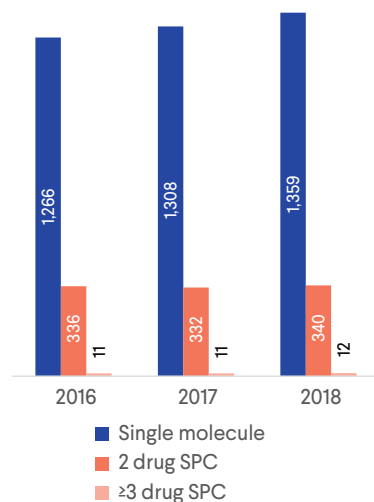
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|--|--|---|
|  <p>Prevalence of hypertension among 18+ population*</p> <h2 style="color: white;">34.5%</h2> |  <p>Antihypertensive market in 2018</p> <h2 style="color: #e67e22;">1,710</h2> <p>million pills (sales volume)</p> |  <p>Sales per capita in 2018</p> <h2 style="color: #e67e22;">67</h2> <p>pills per adult (age 18+)</p> |
|  <p>Estimated number of 18+ adults with hypertension in 2018</p> <h2 style="color: white;">8.86 million</h2> | <h2 style="color: #e67e22;">6,290</h2> <p>million INR (sales value)</p> | <h2 style="color: #e67e22;">193</h2> <p>pills per adult (age 18+) with hypertension</p> |

Antihypertensive drugs sales trend, 2016-2018

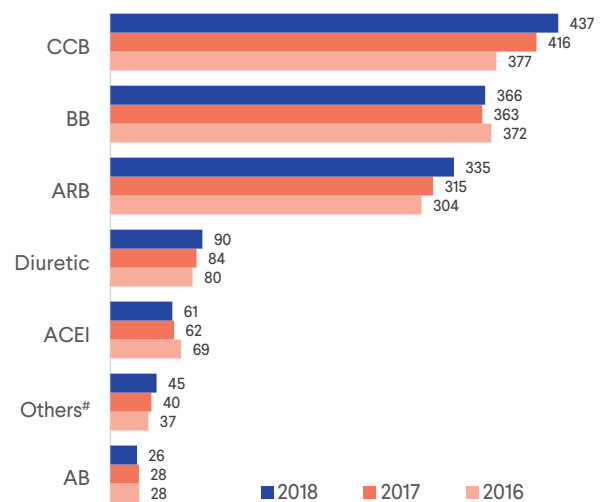


Total volume of sales by type of molecule and drug class, 2016-2018

Single molecule vs single-pill combination (SPC) (pills in millions)



Single molecule by type of drug class (pills in millions)



* Source: DLHS4

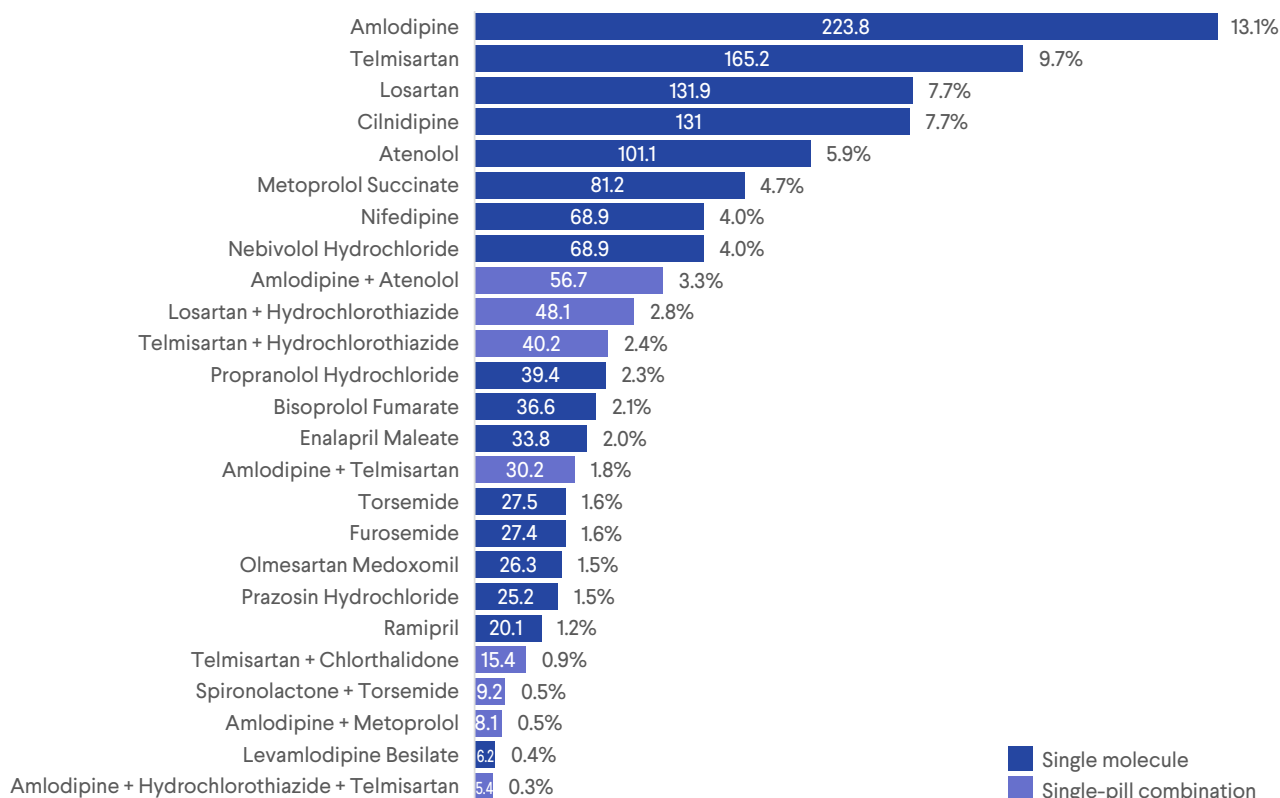
CAGR - Compound annual growth rate

Drug classes include formulations of Clonidine, Methyl dopa, Moxonidine, Dihydralazine and Aliskerin as those do not fall under the classes defined for this analysis.

CCB: calcium channel blockers, BB: beta blockers, ARB: angiotensin receptor blockers, ACEI: angiotensin converting enzyme inhibitors, AB: alpha blockers

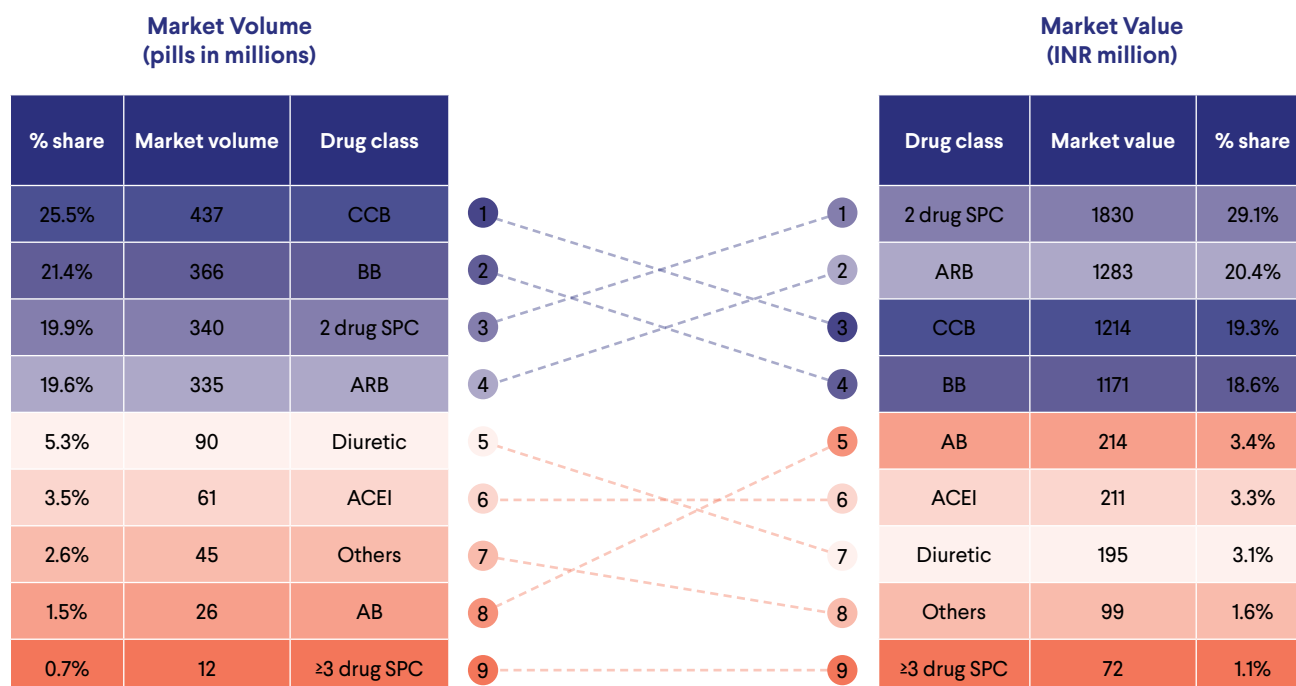
Top 25 molecules in 2018: Kerala

Based on sales volumes (pills in millions) and their percentage contribution to total sales of antihypertensive drugs in the state



Market share of drug classes by volume and value in 2018

Correlation analysis of market share of various antihypertensive drug classes by volume and value



The market sales data was collected by IQVIA, a private healthcare market research company, on behalf of Resolve to Save Lives, an initiative of Vital Strategies.