





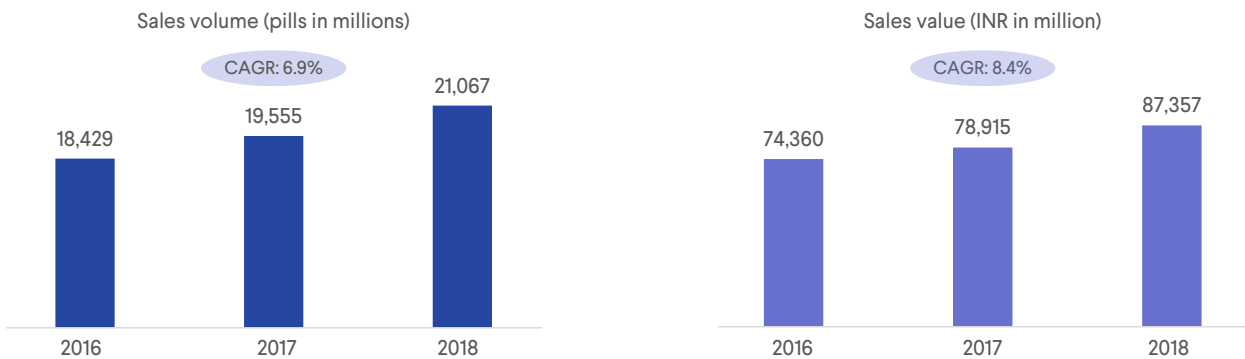
# Antihypertensive Drugs Market Factsheet



This factsheet gives an overview of the private sector antihypertensive drugs market in India 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 country.

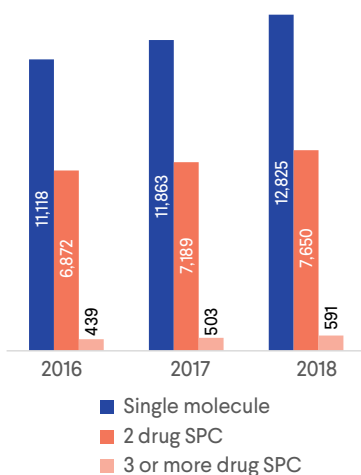
 <p><b>Prevalence of hypertension among 18+ population*</b></p> <h2 style="color: white;">25.3%</h2>	 <p><b>Antihypertensive market in 2018</b></p> <h2 style="color: #e67e22;">21,066</h2> <p>million pills (sales volume)</p>	 <p><b>Sales per capita in 2018</b></p> <h2 style="color: #e67e22;">24</h2> <p>pills per adult (age 18+)</p>
 <p><b>Estimated number of 18+ adults with hypertension in 2018</b></p> <h2 style="color: white;">220 million</h2>	<h2 style="color: #e67e22;">87,357</h2> <p>million INR (sales value)</p>	<h2 style="color: #e67e22;">96</h2> <p>pills per adult (age 18+) with hypertension</p>

## Antihypertensive drugs sales trend, 2016-2018

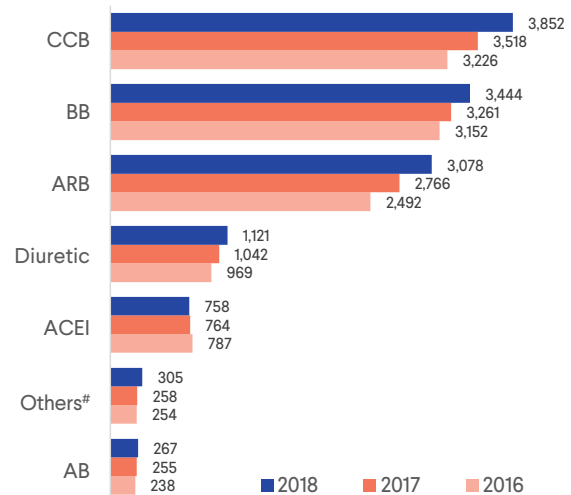


## Total volume of sales by type of molecule and drug class, 2016-2018

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



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



\* Source: DLHS4/AHS

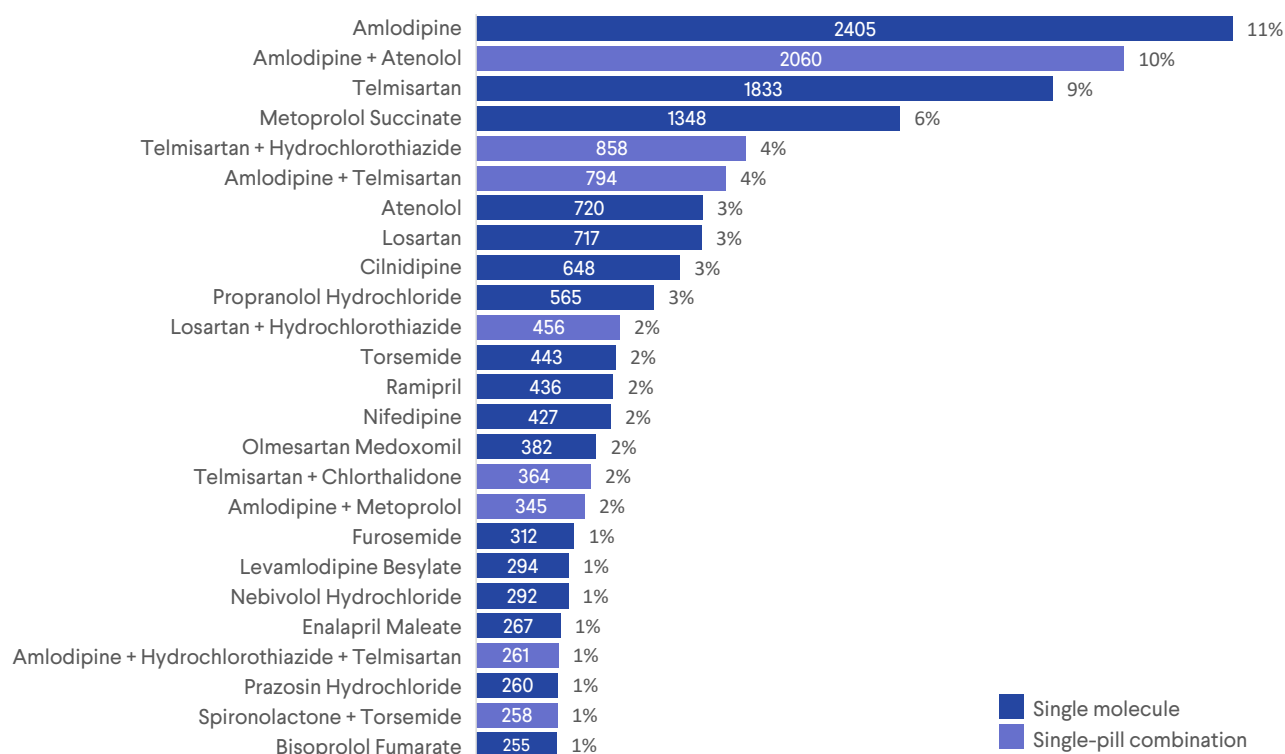
CAGR - Compound annual growth rate

# Drug classes include formulations of Clonidine, Methyl dopa, Moxonidine, Dihyralazine 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: India

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



## Price to consumer of selected antihypertensive drugs in 2018

Maximum retail price (MRP) of selected antihypertensive drugs included in State hypertension treatment protocols (as single and combination products)

Drug class	Molecule	Strength	No. of brands considered	Median price per tablet (INR)	MRP range per tablet (INR)
ACEI	Enalapril	5 mg	10	3.36	2.10 - 3.52
ARB	Losartan	50 mg	10	4.6	2.16 - 6.6
	Telmisartan	40 mg	12	7.19	3.40 - 7.33
CCB	Amlodipine	5 mg	10	2.8	0.68 - 2.86
Diuretic	Chlorthalidone	12.5 mg	7	5.79	2.00 - 6.86
	Hydrochlorothiazide	25 mg	7	1.77	1.53 - 1.85
CCB + ARB	Amlodipine + Telmisartan	5 mg/40 mg	13	10.7	3.35 - 14.30
Diuretic + ARB	Chlorthalidone + Telmisartan	12.5 mg/40 mg	10	10.28	3.75 - 14.62
	Hydrochlorothiazide + Telmisartan	12.5 mg/40 mg	12	9.08	3.53 - 15.48
	Hydrochlorothiazide + Losartan	12.5 mg/50 mg	7	6.38	3.00 - 11.95
CCB + Diuretic + ARB	Amlodipine + Chlorthalidone + Telmisartan	5 mg/12.5 mg/40 mg	3	10.49	9.80 - 11.71
	Amlodipine + Hydrochlorothiazide + Telmisartan	5 mg/12.5 mg/40 mg	2	9.85	7.86 - 11.85

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.

Based on this data, the following studies have been published:

1. Prices of combination medicines and single-molecule antihypertensive medicines in India's private health care sector. *The Journal of Clinical Hypertension*. 2020. <https://doi.org/10.1111/jch.14143>

2. Research Letter: Unmet Need for Hypertension Treatment in India: Evidence from Hypertension Drugs Market Data. *Global Heart*. 2021. <https://doi.org/10.5334/gh.973>