

VERSUS™ | 2023 White Paper

# Antibiotics: Share of Sub-segments and Use Trend in Pharmacies.

Leveraging the power of real world pharmacy sell-out data to unleash growth



# 02

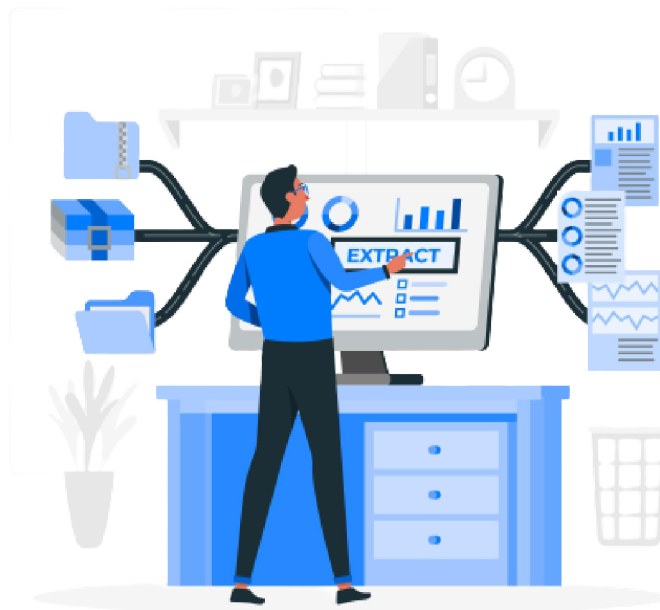
## Leveraging Real World Data



After increased competition from new entrants into both the prescription-only and over-the-counter market segments, pharmaceutical corporations can no longer depend exclusively on educated predictions or observational data when evaluating brand performance in community pharmacy outlets (retail and wholesale).

The antibiotic sector is one of the segments phased by the influx of new entrants into the market having price variations that are way below the price cap of the innovator brands/market leaders. Building on the economic situation plaguing the world with Nigeria having its fair share, most market leaders are barely seen struggling to compete for a share in the densely populated market.

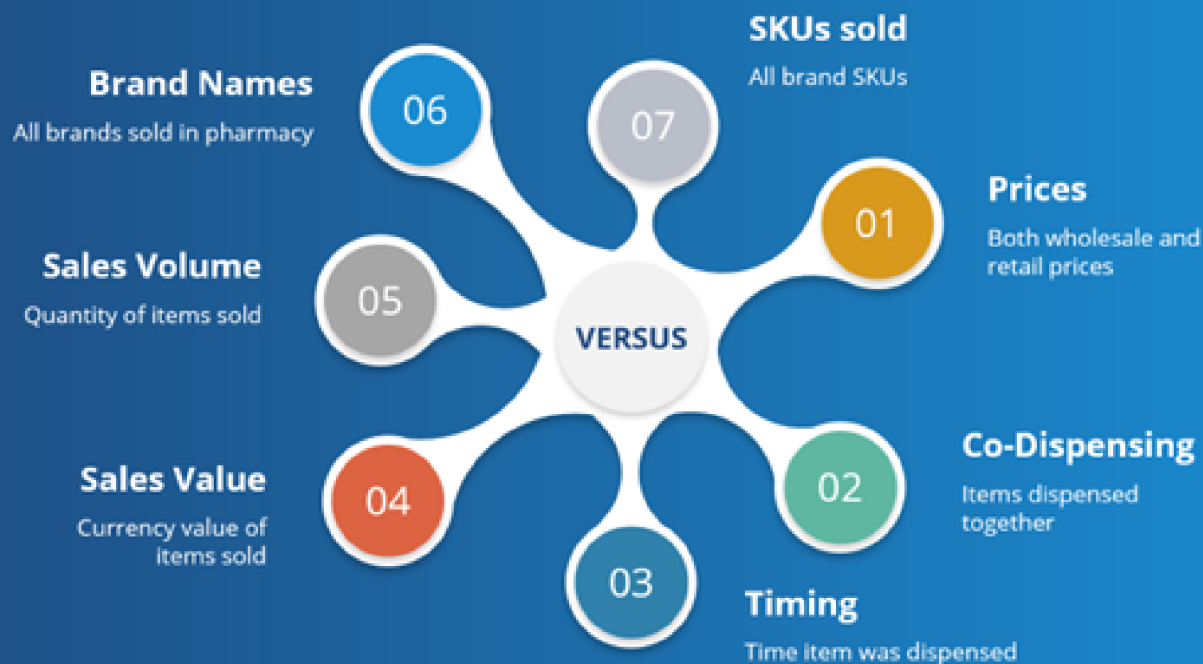
Real-world data can be used to evaluate brand performance, underutilizing it could be fatal in the long run because history is rife with "well-performing brands" that once dominated the market but are now only found in memory vaults (brand recognition) rather than in pharmacy shelves (brand presence).



## Winning in a Competitive Antibiotics Segment

The PBR Versus data gives market insights into all brands by harnessing the pharmacy sell-out data of the Retail community pharmacy. There are currently approximately 350 retail pharmacies in the database where quarterly sell-out data is generated for analysis.

### Profile of VERSUS™ Data



Total number of unique  
antibiotic brands

1,495



Total number of unique  
SKUs

2,016



Total number of  
dosage forms

15

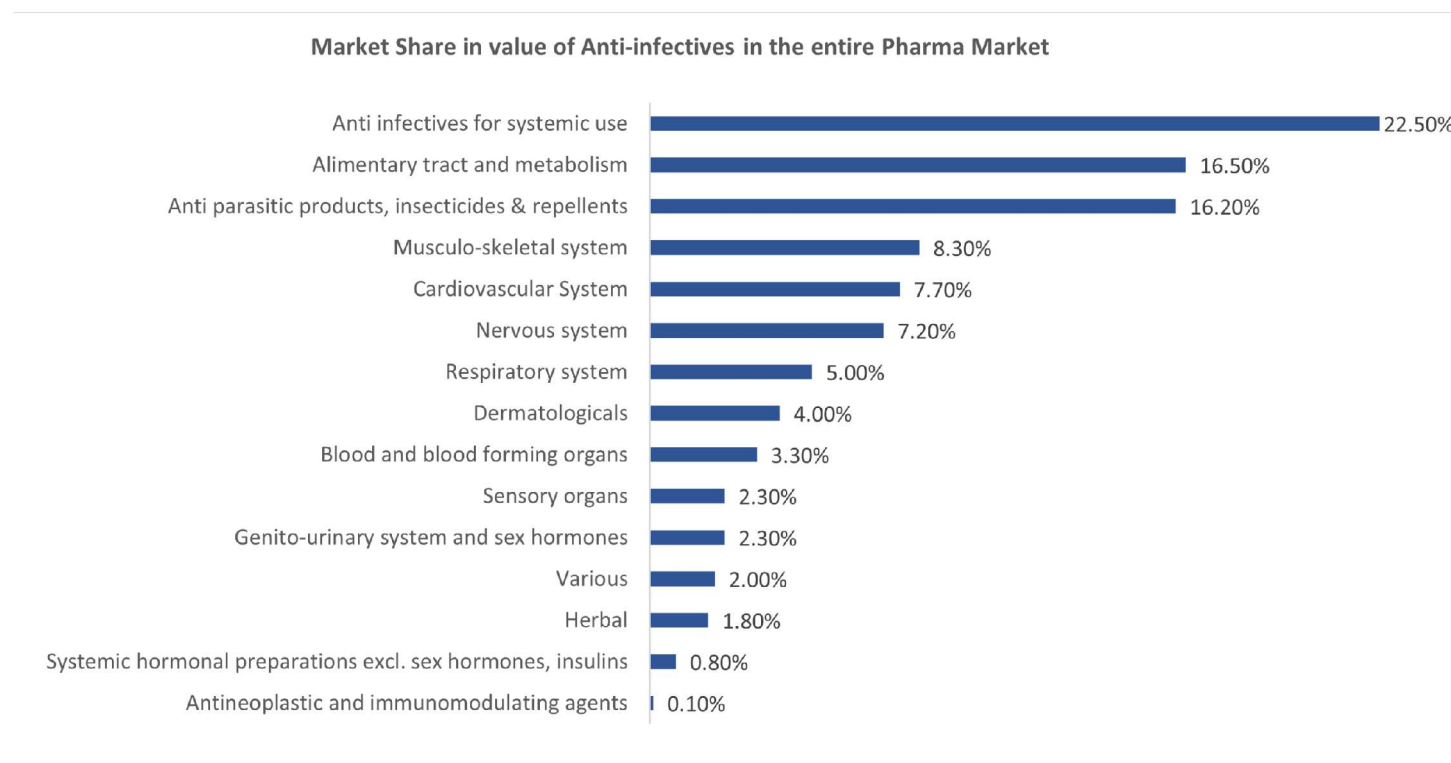
# 04 Introduction

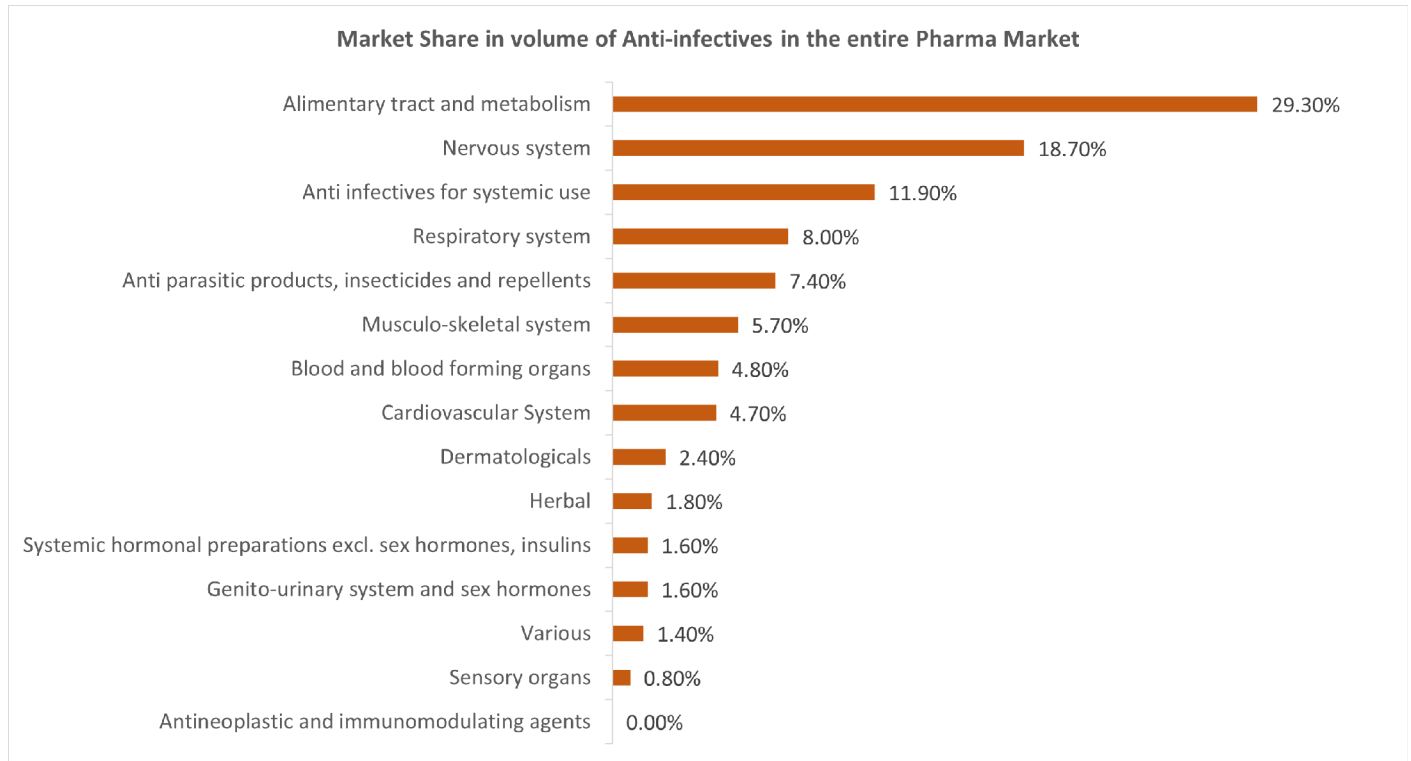
Antibiotics are drugs used to treat infections caused by bacteria. They are widely used in both human and animal medicine and play a crucial role in preventing the spread of bacterial infections. The use of antibiotics has increased significantly over the past few decades, leading to the emergence of antibiotic-resistant bacteria.

Antibiotics are critical in treating bacterial infections, but their overuse has led to the development of resistant bacteria. This is a growing public health concern and highlights the need for a better understanding of the use of antibiotics in different therapy areas. Misuse and overuse of antimicrobials are the main drivers in the development of drug resistance.

## Market Share of the Antibiotics Segment

The global antibiotics market is projected to grow from \$38.08 billion in 2021 to \$45.30 billion in 2028 at a CAGR OF 2.5% in the forecast period, 2021 - 2028.





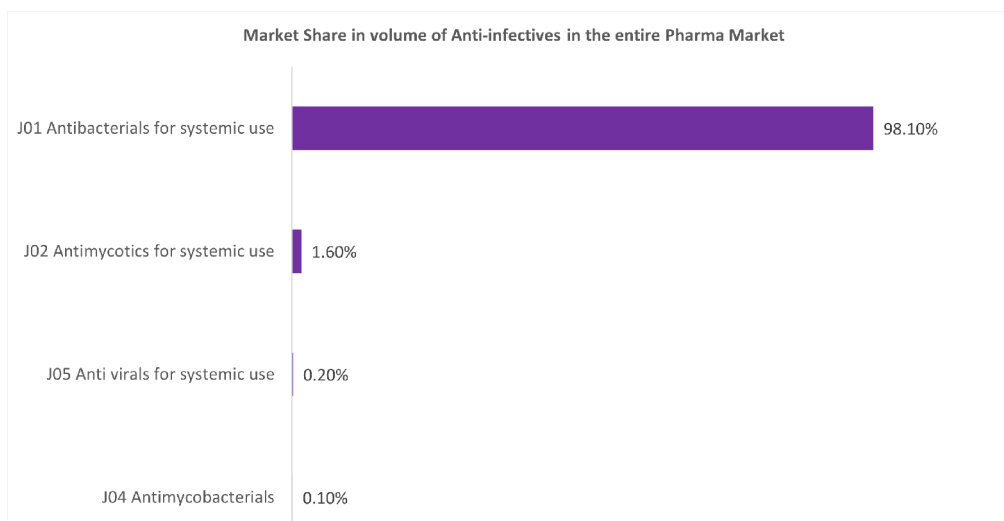
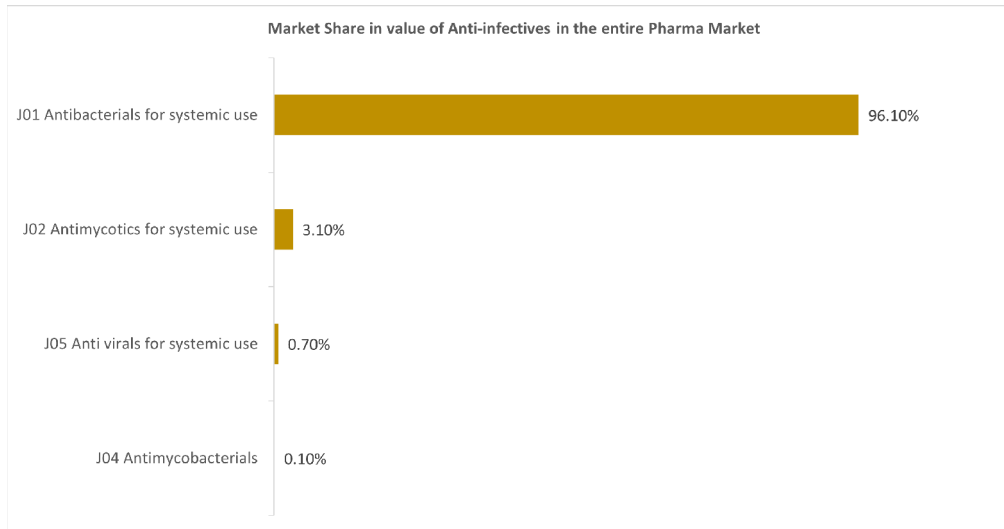
The market is divided into various sub-segments based on their chemical structure and mechanism of action. The major sub-segments include penicillin, macrolides, tetracyclines, cephalosporins, fluoroquinolones, and others.

Antibiotics are classified according to the WHO in Anti-infectives for systemic use. They are the leaders in terms of value with a 22.5% share in the entire pharmaceutical market. This they owe largely to the Beta lactams and Penicillin segment. In terms of sales volume, they rank 3rd with an 11.9% volume share behind drugs used in the Alimentary tract and Metabolism (29.3%) and the Nervous system (18.7%).

J01 Antibacterial for systemic use  
J02 Antimycotics for systemic use  
J04 Antimycobacterial  
J05 Antivirals for systemic use  
J06 Immune sera and immunoglobulins  
J07 Vaccines

# 06

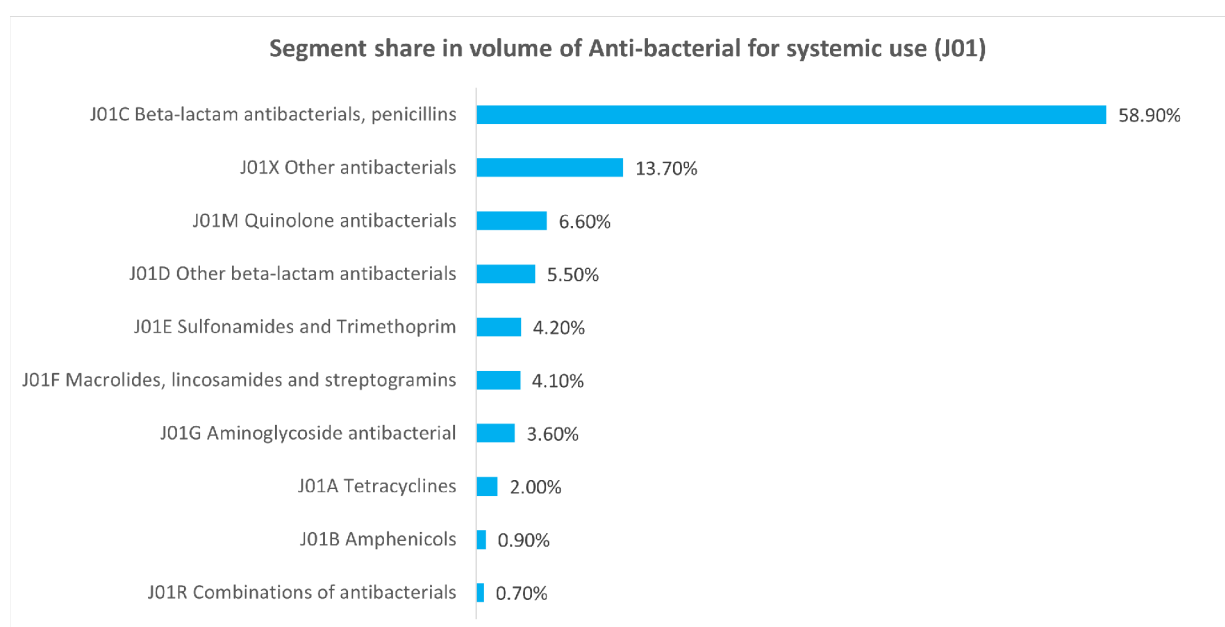
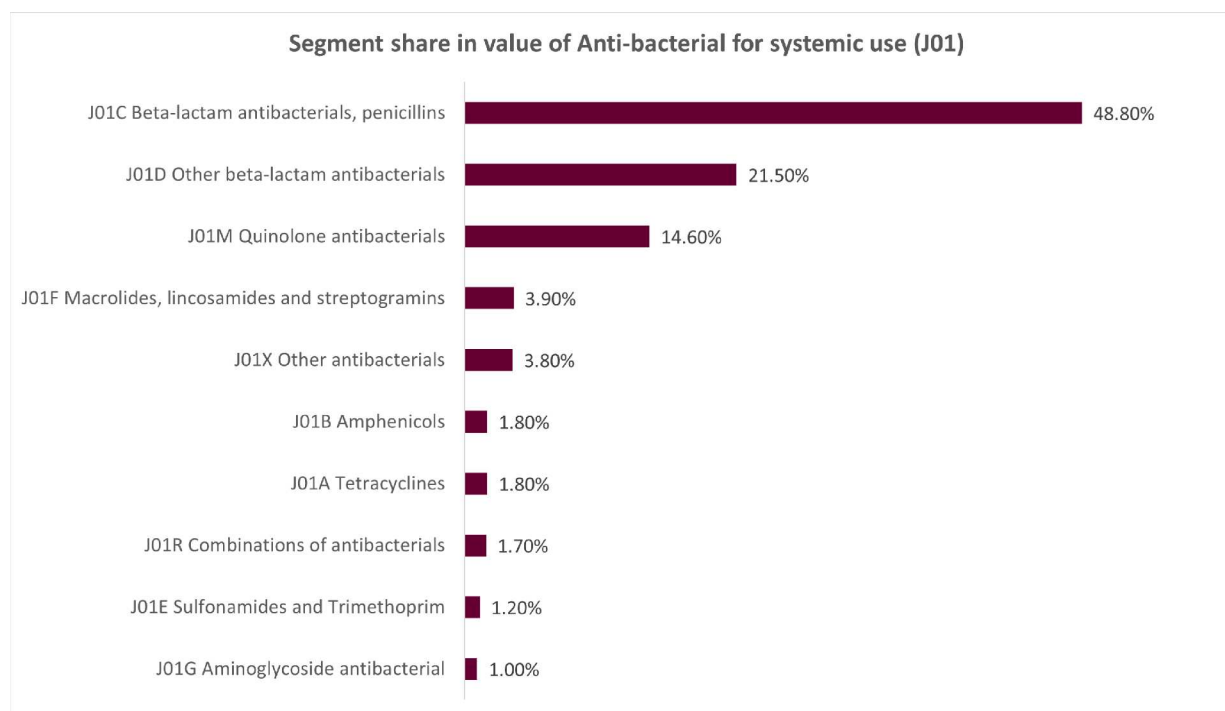
## The Antibiotics Market: An overview



Antibiotic resistance is a major concern in healthcare today. Overuse of antibiotics has led to the development of bacteria that are resistant to multiple antibiotics, making it difficult to treat infections. This has resulted in increased healthcare costs, longer hospital stays, and higher mortality rates. The World Health Organization (WHO) has identified antibiotic resistance as one of the top ten threats to global health.

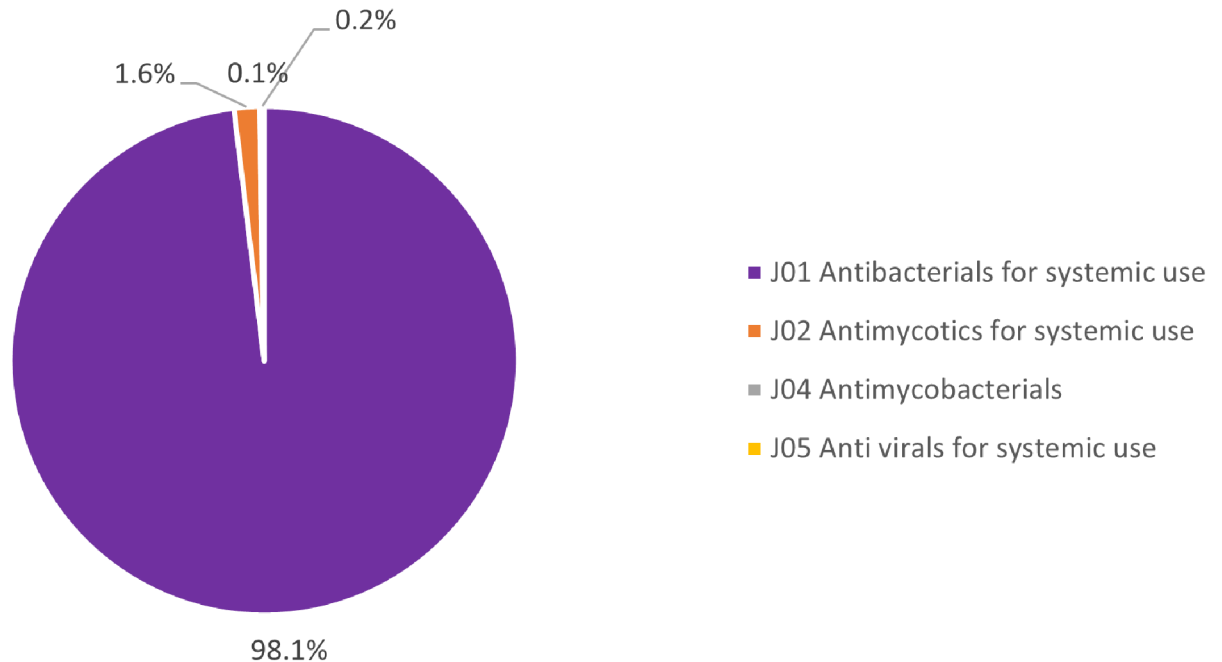
Different studies have analyzed the use of antibiotics in different therapy areas and identify trends in their use in pharmacies. This has provided valuable insights into the current situation, including the sub-segments with the highest share of the antibiotics market, the most commonly used antibiotics, and the therapy areas where antibiotics are most commonly used. These insights can be used to develop strategies to reduce the overuse of antibiotics and mitigate the development of antibiotic-resistant bacteria.

Studies have found that penicillin and macrolides have the highest share of the antibiotics market, followed by tetracyclines, cephalosporins, and fluoroquinolones. Respiratory tract infections are the most common therapy area for antibiotic use, followed by skin infections and sexually transmitted diseases.





### Market Share in volume of Anti-infectives in the entire Pharma Market



#### Potential Use of the Data and Benefits to Companies:

Insights from studies can be used by healthcare organizations and pharmaceutical companies to develop strategies to reduce the overuse of antibiotics and mitigate the development of antibiotic-resistant bacteria. This can result in reduced healthcare costs, shorter hospital stays, and improved patient outcomes. Additionally, the data can be used by pharmaceutical companies to develop new antibiotics and improve the development of existing antibiotics.

#### Call to Action:

Healthcare organizations, pharmaceutical companies, and government agencies should work together to reduce the overuse of antibiotics and mitigate the development of antibiotic-resistant bacteria. This can be achieved through education, research, and the development of new antibiotics and improved treatment strategies. By working together, we can ensure that antibiotics remain effective in treating bacterial infections and improving patient outcomes.



### How VERSUS Data could be of help to organizations and teams

Real world data helps you assess brand performance, market share, and competition at the point of product uptake where impact of investments is best observed. VERSUS™ data can help your team and brands in the following areas, and more:



#### **Pricing, Price Elasticity, & Position vs Competition**

Improve margins and competitiveness with pricing data



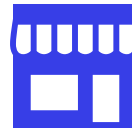
#### **Market Share & Brand Performance**

Objectively assess brand performance in the real world



#### **Track Success of Special Price Promotions**

Measure and improve success of price-volume promotions



#### **Pharmacy Channel Opportunities & Evolution**

Assess opportunity for new brands, co-formulations in pharmacy channel



#### **Assess Impact of Marketing & SF Investment**

Utilise real data in assessing ROI from sales and marketing activities



#### **Market Share and Brand Performance**

Objectively assess brand performance in the real world

### We go beyond the data to help you uncover the 'why?' behind the trends

Leveraging existing relationship with our source pharmacies and the capabilities of our life science primary market research, data science, and consulting teams, we can help with bespoke research projects targeted at pharmacies.



#### **Brand-Specific Retail Audits**

We can help you gather high quality data and insight for your brands



#### **Pricing Research & Advisory**

Supporting you with scientific, data-supported pricing



#### **HCP-Targeted Bespoke Research**

We help you uncover beliefs, knowledge, and behaviours behind pharmacists' and doctors' choices.

## Contact Any of Our Consultants Today

We are here for you. Please contact us today to discuss how we can help you with the market share of your brands today and help you unlock new growth opportunities for your organization in the Nigeria pharmacy channel.

**Call us today to discuss: +2348024787145**



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