

Sumatriptan adds to pricing headaches

Sumatriptan prices started relatively low when generics of GlaxoSmithKline's Imigran were launched last month, according to WaveData's Charles Joynson. He added, however, that "so far prices are falling slower than expected".

Figure 1 shows the lowest prices recorded by WaveData on each day for six-tablet packs of sumatriptan 50mg and 100mg in the period from 15 May and 19 June. The lower strength started at £6.90 (US\$13.00) and fell to £5.25 a month later. This was a price decline of 24%. The higher strength, meanwhile, slipped from £11.60 to £8.94, or a similar relative decline of 23%.

The official trade prices for six-tablet packs of Imigran 50mg and 100mg are £27.62 and £44.64 respectively. With the lowest prices on patent expiry hovering at the £7 and £11 mark, generic sumatriptan started life with the lowest market prices offered to independent pharmacies and dispensing doctors giving a 75% discount on the brand price.

What made the generic launch of GlaxoSmithKline's migraine product more interesting in the UK was the simultaneous launch of the world's first non-prescription sumatriptan under the Imigran Recovery banner. Containing just two tablets of sumatriptan 50mg, the new OTC brand has a recommended retail price of £7.99.

A similar move has not been made by GlaxoSmithKline in Germany, however, to coincide with the ingredient's loss of patent status in Europe's largest generics market. Instead, the brand company chose to switch from prescription to non-prescription status its Formigran migraine brand containing naratriptan 2.5mg, which is still patent-protected.

In fact, the German switch went through a few weeks earlier than in the UK, making OTC Formigran the world's first non-prescription triptan to be authorised. The launch is taking place this month.

Immediate generic competition for Imigran Recovery in the UK is unlikely, however. The Medicines and Healthcare products

Manufacturer	Lowest price
Kent	£5.25
Sandoz	£5.52
Arrow	£6.08
Winthrop	£6.08
Generics UK	£7.20
Niche	£7.20
Sovereign	£8.01
Teva	£8.28
Ivax	£22.70
Ivax*	£38.66

* 12-tablet pack.

Manufacturer	Lowest price
Sandoz	£8.94
Arrow	£9.82
Winthrop	£9.82
Kent	£9.99
Generics UK	£11.75
Niche	£11.75
Sovereign	£12.50
Teva	£13.39
Ivax	£35.71
Ivax*	£62.50

* 12-tablet pack.

Figure 2: Lowest prices on offer of some leading generics players' sumatriptan products in the month following patent expiry, with six-tablet packs of 50mg products above left and 100mg products above right. The prices were either offered direct by the companies or through short-line or full-line wholesalers (Source - WaveData)

Regulatory Agency (MHRA) has not granted GlaxoSmithKline one year of data exclusivity for an innovative switch under Europe's new pharmaceutical legislation. But one condition set by MHRA is that generic applicants will have to await the results of a one-year validation period or start their own validation studies. The MHRA wants to validate that OTC triptans are being sold to the correct population.

Meanwhile, in the prescription arena, Sandoz was offering the lowest-priced sumatriptan 100mg - either directly or indirectly to independent pharmacists and dispensing doctors - in the period after patent expiry, but Kent managed to undercut the world's second-largest firm with the 50mg product (see Figure 2). With the brand's trade prices standing at £27.62 and £44.64, these price lows both represented 80% price discounts on Imigran.

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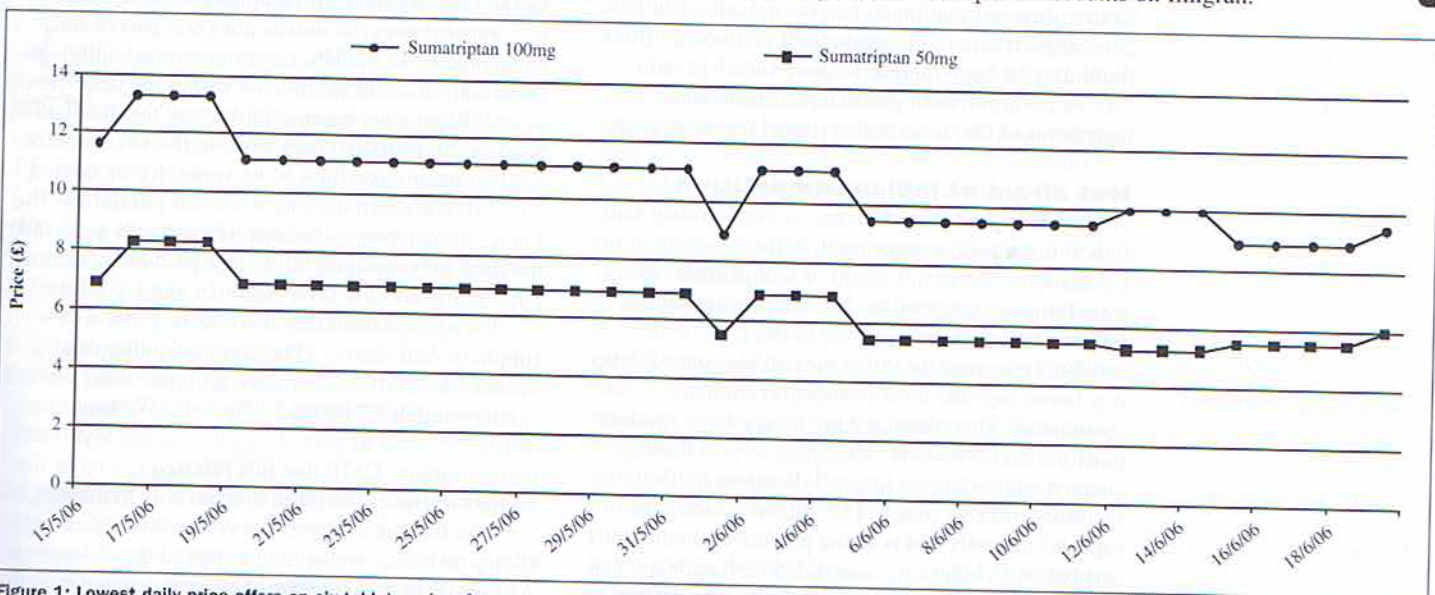


Figure 1: Lowest daily price offers on six-tablet packs of sumatriptan in the period around patent expiry (Source - WaveData)

PRICE WATCH UK

highlights generics price changes in the UK market and appears exclusively in every issue of **Generics bulletin**, courtesy of the Pharma TouchStone service of WaveData.

WaveData collects and collates pricing information from a number of European countries. In the UK, pricing information about generics, brands and parallel imports is gathered from offers made to independent retail pharmacists and dispensing doctors by wholesalers, suppliers and product manufacturers.

WaveData collates this data and publishes the results as its Pharma TouchStone service. This is designed to give customers of the service fast, accurate, real-time access to current generic prices.

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