СОВМЕСТНАЯ ПУБЛИКАЦИЯ
АССОЦИАЦИИ МЕЖДУНАРОДНЫХ
ФАРМАЦЕВТИЧЕСКИХ
ПРОИЗВОДИТЕЛЕЙ
И ГК РЕМЕДИУМ

РЕМЕДИУМ
ГРУППА КОМПАНИЙ

AIPM
Association of International Pharmaceutical Manufacturers
Ассоциация международных фармацевтических производителей

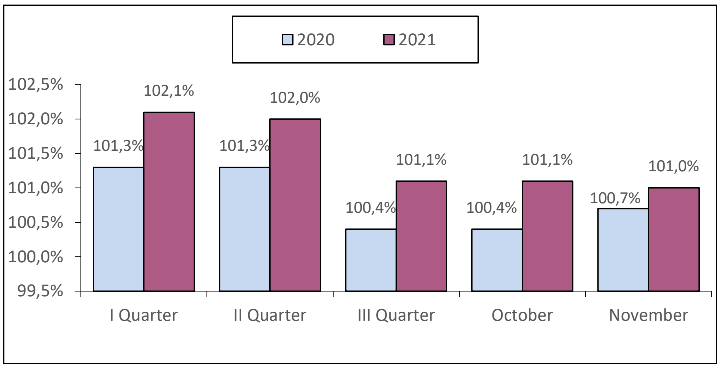
MACROECONOMIC INDICES

Inflation

According to Federal State Statistics Service's data, the Consumer Price Index was estimated as 101.0% in November 2021, 107.5% as compared to December 2020.

In November 2021, the Producer Price Index for industrial production was 102.7% as compared to the previous month, in the month-earlier period it had amounted to 100.4%. The index accounted for 127.5% against December of 2020.

Figure 1. Consumer Price Index (compared with the previous period)



Living standard

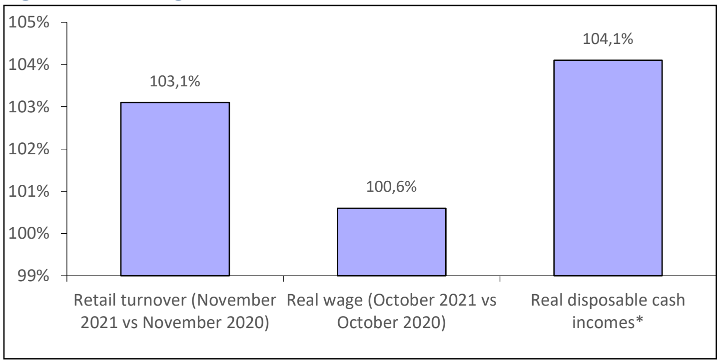
In October 2021, a gross monthly average wage of corporate employees reached RUB 54649 (USD 764.43). It increased by 108.8% compared to October 2020, and 99.7% compared to the previous period. In October 2021, the real gross wage accounted for 100.6% as compared to October 2020, and 98.6% against the prior period.

According to estimates[1], real disposable cash incomes increased by 4.1% in January-September of 2021 as compared to January-September of 2020 (Fig. 2).

Retail turnover

In November 2021, the retail turnover was equal to RUB 3410.6 bil. or 103.1% (in comparable prices) against the respective period of the previous year, and RUB 35096.8 bil. or 107.5% in January - November 2021 (Fig. 2).

Figure 2. Real wage and retail turnover



* January-September 2021 vs. January-September 2020.

Industrial Production

According to Federal State Statistics Service's data, Industrial Production Index accounted for 107.0% in November 2021 as compared to the same period in the previous year, and 105.2% in January - November 2021.

According to Federal State Statistics Service's data, Industrial Production Index for drugs and medical products accounted for 108.6% in November 2021 compared to the same period of 2020, and 118.6% in January-November vs January-November 2020.

Domestic production

Table 1 provides the top 10 domestic pharmaceutical manufacturers according to their volumes of sales in all segments of the market based on the results for November 2021.

[1] Due to switching of Federal State Statistics Service to the updated methodology for calculating real disposable cash incomes of the population, the data are published once a quarter.

Figure 1. The top ten Russian chemical and pharmaceutical manufacturers by sales, November 2021

Rank	Manufacturer	RUB mil.
1	Biocad	6069.1
2	Pharmasyntez	5106.1
3	Otcpharm	4652.8
4	Promomed	3117.2
5	Stada	2837.2
6	Binnopharm	2352.4
7	R-Pharm	2163.6
8	Valenta	1782.1
9	Pharmstandart	1745.4
10	Grotex	1719.6

Source - Remedium according to IQVIA's data

Table 2 provides pharmacy sales data from 10 regions of the Russian Federation. Sales (in terms of roubles) showed a growth in most regions in October 2021 as compared to the previous month. The most pronounced growth in sales was observed in Voronezh Region (+21%), the least one – in Rostov Region (+2%). The most significant reduction in sales was reported in St. Petersburg (-18%), the least one in Krasnodar Krai (-3%).

Figure 2. Pharmacy sales in the regions, 2021

Region	Pharmacy sales, $ mil. (wholesale prices)			Growth gain, % (roubles)		
	August 2021	September 2021	October 2021	August/July 21	September/ August 21	October/September 21
Moscow	140.4	212.2	196.5	9%	50%	-9%
St. Petersburg	66.7	108.4	90.5	11%	61%	-18%
Krasnodar Krai	64.9	60.6	60.0	26%	-7%	-3%
Krasnoyarsk Krai	23.8	28.9	30.2	-2%	20%	3%
Tatarstan	25.5	31.8	35.3	17%	24%	9%
Rostov Region	31.9	35.8	37.1	28%	11%	2%
Novosibirsk Region	23.0	31.2	29.8	-10%	35%	-6%
Voronezh Region	16.9	20.9	25.8	23%	23%	21%
Perm	9.1	10.6	11.4	-1%	16%	6%
Tyumen	9.6	10.5	11.0	10%	8%	3%

Advertising

The largest advertisers and pharmaceutical brand names highly publicized in mass media (TV, radio, press, outdoor advertising) are shown in Tables 3 & 4.

Figure 3. Top five advertisers in mass media in November 2021

Rank	Company*	Quantity of broadcasts
1	Otcpharm	11,463
2	Berlin-Chemie/Menarini	8,372
3	GSK Consumer Healthcare	8,031
4	Bayer	6,793
5	Sanofi	6,777

Source - Remedium according to Mediascope's data

Figure 4. Top five brand names in mass media in November, 2021

Rank	Brand*	Quantity of broadcasts
1	Evalar	2,800
2	Strepsils	2,661
3	Ergoferon	2,542
4	Otrivin	2,344
5	Complivit	2,290

Source - Remedium according to Mediascope's data

* Only drugs registered with National Medicine Register were considered.

STATE REIMBURSEMENT PROGRAM (DLO) IN THE RUSSIAN FEDERATION: 2021 FIRST NINE MONTHS RESULTS

According to DLO in RF™ IQVIA, the drug supplies under the Federal Program amounted to RUB 97,760 bil. on the basis of the results for the first nine months of 2021 (USD 1.316 bil.) at contractual prices. The segment volume increased 4% in terms of roubles but decreased by 2% in terms of dollars as compared to the same period in 2020. Scope of supplies in pack terms decreased by 8% to 56.630 mil. packs. The average cost of a FPP pack through the DLO program was USD 23.24 in contractual prices (a year ago it was USD 21.84).

Based on the results for January-September 2021, the manufacturers GENERIUM (+0.2%[2]), TAKEDA (+3%) and CELGENE (-13%) hold leading positions in the DLO segment despite the pronounced negative growth rates of the latter (Table 1). JOHNSON & JOHNSON (+4%) moved up to rank four from five, while BIOCAD (-2%), which had been placed at this rank earlier, moved down one rank. The only newcomer of the top 10 ranking ROCHE (3.2-fold growth in purchases) moved up to the following rank. At the same time, it displaced NOVARTIS (+1%), SANOFI (-9%), OCTAPHARMA (+2%) and NOVO NORDISK (-15%) down one rank, to numbers seven through ten. The total share of the top 10 drug manufacturers within DLO Program reduced from 61.5% to 60.7%.

Figure 1. The top 10 drug manufacturers for DLO

Rank		Manufacturer*	Share in total DLO volume, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	1	GENERIUM ZAO RF	10.7	11.1
2	2	**TAKEDA**	10.5	10.7
3	3	**CELGENE**	7.8	9.4
4	5	**JOHNSON & JOHNSON**	6.6	6.6
5	4	BIOCAD RF	6.3	6.8
6	16	**ROCHE**	4.6	1.5
7	6	**NOVARTIS**	4.5	4.7
8	7	**SANOFI**	3.8	4.3
9	8	OCTAPHARMA	3.2	3.3
10	9	**NOVO NORDISK**	2.6	3.2
Total			60.7	61.5

*AIPM members are in bold

Three newcomers broke into the top ten brands ranking (Table 2). OCTOFACTOR (+92%), OCREVUS and PLEGRIDY (+33%) moved up to ranks three, seven and ten respectively. Brands ADVATE (+45%) and TYSABRI (+9%) also demonstrated positive growth rates, which allowed them to move up to ranks 2 and 8, respectively. The growth rates of the remaining brands were negative; however, they did not prevent the brands REVLIMIDE (-13%) and ACELLBIA (-4%) from maintaining their ranks one and five. At the same time, ELAPRASE (-3%), ELIZARIA (-17%) and DARZALEX (-25%) moved down to ranks four, six and nine, respectively. The total share of the top 10 increased from 29.1% to 30.9%.

Figure 2. The top 10 Brands in DLO segment

Rank in the top ten		Brand	Share in total DLO volume, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	1	REVLIMIDE	7.8	9.4
2	4	ADVATE	3.9	2.8
3	12	OCTOFACTOR	3.3	1.8
4	2	ELAPRASE	3.1	3.3
5	5	ACELLBIA	2.6	2.8
6	3	ELIZARIA	2.6	3.2
7	N/A	OCREVUS	2.2	N/A
8	10	TYSABRI	2.1	2.0
9	7	DARZALEX	1.8	2.5
10	16	PLEGRIDY	1.6	1.3
Total			30.9	29.1

Just as the corresponding brand, LENALIDOMIDE (-13%) continued to hold rank number one in the top 10 INN and group names ranking (Table 3). The remaining INNs from the top ten ranking changed their positions; moreover, four INNs improved them. OCTOCOG ALFA (+45%) moved up to rank two from seven, whereas the newcomers of the top ten ranking MOROCTOCOG ALFA (+92%), OCRELIZUMAB and NATALIZUMAB (+9%) moved up to ranks five, nine and ten respectively. At the same time, RITUXIMAB (-1%), FACTOR VIII (+7%) and INTERFERON BETA-1A (-2%) moved down one rank, coming in at numbers three, four and seven. INN IDURSULFASE (-3%) moved down from rank six to four, and ECULIZUMAB (-18%) – to rank eight from five. The total share of the top ten ranking increased by 2 p.p. to 35.6%.

Figure 3. The top ten INN and group names in DLO segment

Rank in the top ten		INNs/Grouping Names	Share in total DLO volume, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	1	LENALIDOMIDE	7.8	9.4
2	7	OCTOCOG ALFA	3.9	2.8
3	2	RITUXIMAB	3.9	4.1
4	3	FACTOR VIII	3.7	3.6
5	14	MOROCTOCOG ALFA	3.3	1.8
6	4	IDURSULFASE	3.1	3.3
7	6	INTERFERON BETA-1A	3.1	3.3
8	5	ECULIZUMAB	2.6	3.3
9	N/A	OCRELIZUMAB	2.2	N/A
10	13	NATALIZUMAB	2.1	2.0
Total			35.6	33.6

The top ten INNs and grouping names showed high stability: it didn't change in composition and most of its INNs held their own in the ranking (Table 4). At the same time, half of the ATC groups showed positive growth rates in the analysed period. L04 Immunosuppressants (+6%), B02 Antihemorrhagics (+17%) and L01 Antineoplastic agents (+3%) topped the top 10 ranking, A16 Other alimentary tract and metabolism products (+2%) held their previous rank 6 and B01 Antithrombotic agents (+50%) moved up to rank 7. At the same time, R03 Drugs for obstructive airway diseases (-8%) and B03 Anti-anaemic preparations (-21%) moved down one rank. Despite the decrease in purchases, A10 Drugs used in diabetes (-1%), L03 Immunostimulants (-2%) and H01 Pituitary and hypothalamic hormones and analogues (-4%) held their own in the ranking. The total share of the top ten ranking increased from 86.2% to 87.3%.

Figure 4. The top ten ATC groups in DLO segment

Rank		ATC code	ATC group	Share in total DLO volume, %	
9 mon. 2021	9 mon. 2020			9 mon. 2021	9 mon. 2020
1	1	L04	IMMUNOSUPPRESSANTS	24.8	24.5
2	2	B02	ANTIHEMORRHAGICS	18.9	16.9
3	3	L01	ANTINEOPLASTIC AGENTS	11.2	11.4
4	4	A10	DRUGS USED IN DIABETES	9.2	9.6
5	5	L03	IMMUNOSTIMULANTS	7.5	7.9
6	6	A16	OTHER ALIMENTARY TRACT AND METABOLISM PRODUCTS	7.1	7.3
7	9	B01	ANTITHROMBOTIC AGENTS	2.9	2.0
8	7	R03	DRUGS FOR OBSTRUCTIVE AIRWAY DISEASES	2.4	2.7
9	8	B03	ANTIANEMIC PREPARATIONS	1.7	2.2
10	10	H01	PITUITARY, HYPOTHALAMIC HORMONES AND ANALOGUES	1.6	1.7
Total				87.3	86.2

Data on supplies to the top ten regions of Russia under State Reimbursement Program (DLO) are shown in Table 5. The distribution of ranking positions in the analysed period remained unchanged. Moscow, Moscow region and St. Petersburg continue to show the largest volumes of purchases. At the same time, the growth rates of the first one coincided with those of the DLO segment, the growth rates of the second significantly exceeded them (+12%), and the growth rates of the third, on the contrary, were negative (-6%). A decrease in the supplies under the program was also reported in the Krasnodar Krai, Tyumen, and Nizhny Novgorod Regions. The cumulative share of the top 10 regions reduced from 40.5% to 39.7%.

Figure 5. The top ten regions by sales in DLO segment

Rank		Region	Share in total DLO volume, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	1	Moscow	11.2	11.2
2	2	Moscow Region	5.1	4.8
3	3	Saint Petersburg	3.9	4.3
4	4	Krasnodar Krai	3.3	3.5
5	5	Sverdlovsk Region	3.5	3.4
6	6	Tatarstan Republic	3.1	3.0
7	7	Novosibirsk Region	2.7	2.7
8	8	Tyumen Region	2.4	2.7
9	9	Nizhny Novgorod Region	2.1	2.5
10	10	Chelyabinsk Region	2.4	2.4
Total			39.7	40.5

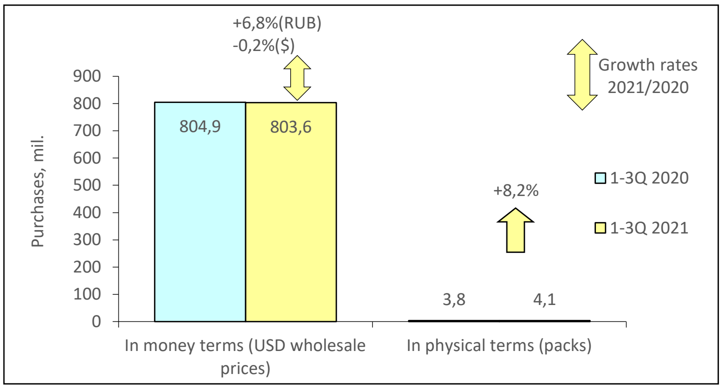
Conclusion. On the basis of the results for nine months of 2021, the DLO segment brought in RUB 97.760 bil. (USD 1.316 bil.) at contractual prices, which was by 4% more in terms of roubles and by 2% less in terms of dollars than in the same period of 2020. In pack terms, the supplies under the program decreased by 8% to 56.630 mil. packs. The average cost of FPP included in the DLO Programme increased as compared to the past year (USD 23.24 vs USD 21.84).

[2]Hereinafter, unless otherwise stated, growth gains are stated in the rouble equivalent or national currency.

COST-INTENSIVE NOSOLOGIES (VZN) PROGRAM, 1-3 Q 2021

In the first 9 months of 2021, supplies under the VZN drug supply program (according to IQVIA) in terms of dollars slightly decreased as compared to 1-3 quarters 2020, but increased in terms of rouble (804 mil., -0.2% and 59.8 bil., +6.8% respectively). in terms of packs, VZN purchases increased by 8.2% (4.1 mil. packs).

Figure 1. Purchases trend under the VZN Program in 1-3 Q 2021 vs 1-3 Q 2020



The groups of drugs to treat systemic-onset juvenile arthritis (+37%), drugs to treat multiple sclerosis (+20%), and haemophilia (+17%) showed the largest increase in purchases in terms of roubles as compared to the same period of the previous year. A negative increase in purchases was recorded in the groups of drugs for the treatment of haemolytic uremic syndrome (-18%), oncohematological drugs (-10%) and drugs for the treatment of Gaucher's disease (-9%). In the 1-3 quarter of 2021, the group of drugs for the treatment of haemophilia remained the leader of the purchases ranking, the oncohematological drugs and drugs for the treatment of multiple sclerosis moved up to ranks two and three, respectively.

Figure 1. Supplies pattern under the VZN Program

Nosologies	INN	Share in total VZN supplies (RUB), %	
		1-3Q 2021	1-3Q 2020
Haemophilia		30.6	28.0
	OCTOCOG ALFA	6.4	4.7
	FACTOR VIII	6.1	6.1
	MOROCTOCOG ALFA	5.4	3.0
	FACTOR VIII*FACTOR VON WILLEBRAND	3.0	2.7
	EPTACOG ALFA (ACTIVATED)	2.6	4.0
	FACTOR VIII INHIBITOR BYPASSING FRACTION	2.0	4.6
	EMICIZUMAB	1.8	
	FACTOR IX	1.8	1.8
	FACTOR VON WILLEBRAND*FACTOR VIII	0.8	0.7
	NONACOG ALFA	0.5	0.5
	SIMOCTOCOG ALFA	0.4	
Oncohematology		**23.3**	**27.6**
	LENALIDOMIDE	12.8	15.7
	RITUXIMAB	6.2	6.3
	DARATUMUMAB	2.9	4.1
	BORTEZOMIB	0.9	0.8
	IMATINIB	0.4	0.4
	FLUDARABINE	0.2	0.2
Sclerosis Multiplex		**22.0**	**19.6**
	INTERFERON BETA-1A	5.0	5.5
	OCRELIZUMAB	3.5	
	NATALIZUMAB	3.4	3.3
	INTERFERON BETA-1B	2.9	3.8
	PEGINTERFERON BETA-1A	2.6	2.1
	TERIFLUNOMIDE	2.2	2.4
	GLATIRAMER ACETATE	1.5	1.6
	ALEMTUZUMAB	0.9	0.8
Mucopolysaccharidosis type I, II and VI		**9.4**	**9.5**
	IDURSULFASE	5.1	5.6
	GALSULFASE	2.5	2.7
	LARONIDASE	1.1	1.1
	IDURSULFASE BETA	0.8	0.1
Hemolytic-uremic syndrome		**4.2**	**5.4**
	ECULIZUMAB	4.2	5.4
Transplantation		**3.7**	**3.4**
	TACROLIMUS	2.3	2.3
	MYCOPHENOLIC ACID	0.8	0.6
	EVEROLIMUS	0.4	0.3
	CICLOSPORIN	0.2	0.2
	MYCOPHENOLATE MOFETIL	0.1	0.1
Systemic-onset juvenile arthritis.		**2.9**	**2.2**
	CANAKINUMAB	2.3	1.7
	TOCILIZUMAB	0.6	0.4
	ETANERCEPT	0.0	0.0
	ADALIMUMAB	0.0	0.0
Mucoviscidosis		**2.0**	**2.0**
	DORNASE ALFA	2.0	2.0
Gaucher disease		**1.7**	**2.0**
	IMIGLUCERASE	0.9	1.4
	VELAGLUCERASE ALFA	0.8	0.6
Pituitary dwarfism		**0.3**	**0.3**
	SOMATROPIN	0.3	0.3

In the first 9 months of 2021, Generium held its previous rank number one in the manufacturers ranking, despite virtually no increase in growth as compared to the same period last year (+0.2%) and a decrease in the total share in sales (by 1%) (Table 3). The main growth was provided by an increase in purchases of Octofactor (+92%) for the treatment of hemophilia. Octofactor moved up from rank 11 to 3 in the brands ranking. The biosimilar Elizaria for the treatment of atypical hemolytic uremic syndrome also broke into the top 10 brands ranking (despite a slight increase in sales 17%). Takeda moved up to rank two in the top ten manufacturers ranking. The purchases of Takeda drugs increased 2.7% and the share in the VZN segment pattern reduced from 18% to 17% as compared to the same period in the previous year (Table 3). Elaprase to treat mucopolysaccharidosis type II (-3.4%) and recombinant coagulation factor VIII Advate (+44%) made up the main volume of sales of the company. Both drugs broke into the top ten brands ranking and moved up to ranks five and two respectively (Table 2). Celgene held its previous rank three in the ranking. Revlimid is the only drug of the company taking the lead in the top ten brands ranking, which decreased its share in the supply pattern from 16% to 13% (Table 2).

Figure 2. Top ten brand names by purchases under the VZN Program

Rank		Brand	Share in total VZN supplies, %	
1-3Q 2021	1-3Q 2020		1-3Q 2021	1-3Q 2020
1	1	REVLIMIDE	12.8	15.7
2	4	ADVATE	6.4	4.7
3	11	OCTOFACTOR	5.4	3.0
4	2	ELAPRASE	5.1	5.6
5	3	ELIZARIA	4.2	5.4
6	6	ACELLBIA	4.1	4.2
7		OCREVUS	3.5	
8	9	TYSABRI	3.4	3.3
9	7	DARZALEX	2.9	4.1
10	15	PLEGRIDY	2.6	2.1
Total			50.4	54.8

Johnson & Johnson held its previous rank four in the manufacturers ranking. The company's drugs hold ranks 8 through 10 in the brands ranking. Tysabri (Natalizumab) moved up from rank 9 to 8 in the ranking (+9%), Darzalex (Daratumumab) indicated for multiple myeloma (-28%), and a newcomer Plegridy (Peginterferon beta-1), a drug for the treatment of multiple sclerosis, broke into the top 10 ranking (+32%) moved up to ranks nine and ten. Biocad hold its previous rank five in the ranking. Acellbia (Rituximab), the leading drug of the manufacturer, moved down to rank 6 in the brands ranking (+4%). Roche's novel drug for the treatment of multiple sclerosis, Ocrevus (Ocrelizumab), which purchases are in 1-3 quarter of 2021 amounted to over RUB 2 bil., for the first time broke into the top ten brands ranking (rank 7), which allowed Roche to move up from rank 15 to 6 in the manufacturers ranking.

Figure 3. Top ten manufacturers by purchases under the VZN Program

Rank in the top ten		Manufacturer*	Share in total VZN supplies, %	
1-3Q 2021	1-3Q 2020		1-3Q 2021	1-3Q 2020
1	1	GENERIUM ZAO RF	17.5	18.6
2	2	**TAKEDA**	16.9	17.6
3	3	CELGENE	12.8	15.7
4	4	**JOHNSON & JOHNSON**	8.9	9.6
5	5	BIOCAD RF	8.8	9.2
6	15	**ROCHE**	6.1	0.9
7	6	OCTAPHARMA	5.1	5.3
8	8	**CSL BEHRING GMBH**	2.7	2.8
9	12	**NOVARTIS**	2.6	2.1
10	9	**BIOMARIN IRELAND**	2.5	2.7
Total			83.8	86.8

*AIPM members are in bold

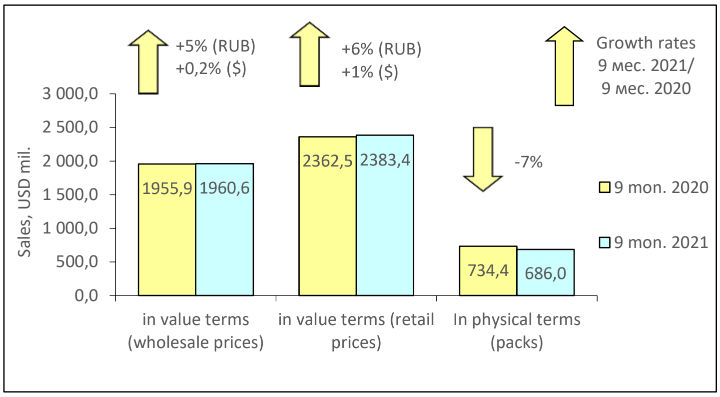
Conclusion: In the first nine months of 2021, purchases under the VZN programme increased as compared to 1-3 quarter of 2020. The share of domestically produced drugs increased from 30% to 32%, the share of localized products (final manufacturing stages) remained at the level of 34%. The share of localized products (localization of the FFP stage) and the share of imported drugs remained virtually unchanged, 9% and 24%, respectively.

CFD PHARMACY MARKET (WITHOUT MOSCOW): 2021 FIRST NINE MONTHS RESULTS

According to Federal State Statistics Service, as of January 1, 2021, estimated population of the Central Federal District (CFD) (without Moscow) was 26.596 mil., which accounted for 18.2% of the total Russian Federation population. According to Federal State Statistics Service's data, based on the results for January-September 2021, the average wage in the CFD (with Moscow) was RUB 69424 (USD 938.04), which was 28% higher than the average wage in Russia (RUB 54447).

According to the results of the Retail Audit of Finished Pharma Products (FPP) in Russian Federation™ IQVIA, at the end of the first nine months of 2021 the sales of drugs in physical terms in the CFD (without Moscow) showed negative growth rates (-7%) to 685.972 mil. packs. In money terms, the market saw a 5% increase in terms of roubles and 0.2% in terms of dollars. At the same time, the market volume reached RUB 144.974 bil. (USD 1.961 bil.) at wholesale prices (Fig.1). The region market share accounted for 20.7% of the Russian pharmacy retail sales. The average cost of a pack increased as compared to the same period of 2020 and was equal to USD 3.47 against USD 3.22 at retail prices. At the end of January-September 2021, an average amount spent by the region residents for FPPs in the pharmacies amounted to USD 89.61.

Figure 1. The CFD (without Moscow) pharmacy market for 9 months of 2020 – 9 months 2021



At the end of the first nine months of 2021, half of the top ten manufacturers demonstrated growth in sales on the pharmacy market of the Central Federal District (CFD) (without Moscow) (Table 1). The leader of the ranking, BAYER (+18%), showed the most significant growth. Manufacturers STADA (+8%), TEVA (+2%), GLAXOSMITHKLINE (+6%) and ABBOTT (+9%) did not show so significant growth, but improved their rankings, moving up to ranks two, six, eight and nine respectively. On the contrary, SANOFI (-7%), OTCPHARM, SERVIER, KRKA and BERLIN-CHEMIE/MENARINI (-1% each for all four) showed negative growth rates and drop in the rankings in the analysed period. The cumulative share of the top ten reduced by 0.5 p.p. and accounted for 35.1%.

Figure 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	1	**BAYER**	5.2	4.6
2	4	**STADA**	3.9	3.8
3	2	**SANOFI**	3.8	4.3
4	3	OTCPHARM	3.7	3.9
5	5	**SERVIER**	3.4	3.6
6	7	**TEVA**	3.3	3.4
7	6	**KRKA**	3.3	3.4
8	10	**GLAXOSMITHKLINE**	2.9	2.9
9	8	**BERLIN-CHEMIE/MENARINI**	2.9	3.1
10	11	**ABBOTT**	2.8	2.7
Total			35.1	35.6

*AIPM members are in bold

Due to a 53% sales growth, XARELTO held and strengthened its rank number one in the top 10 brands ranking (Table 2). Some shifts took place in the lower part of the top ten ranking, due to which only three ATC brands rose in the ranks. Thus, ELIQUIS (2.1-fold increase in sales) and ARBIDOL (+26%) moved up to ranks two and three, while the only newcomer CARDIOMAGNYL (+17%) broke into the top ten ranking, coming in at number nine. In addition to the above, DETRALEX and NUROFEN also demonstrated outperforming growth rates (+13% each), holding their previous ranks four and seven. MEXIDOL (+7%) also performed slightly better than the market, however, it lost one rating point and moved up to rank six. The brands CONCOR (+1%), INGAVIRIN (-9%) and PENTALGIN (+5%) also fell in the ranks. The total share of the top 10 brands increased from 7.6% to 9%.

Figure 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	1	XARELTO	1.8	1.2
2	8	ELIQUIS	1.3	0.7
3	6	ARBIDOL	0.9	0.7
4	4	DETRALEX	0.8	0.8
5	2	CONCOR	0.8	0.8
6	5	MEXIDOL	0.8	0.8
7	7	NUROFEN	0.7	0.7
8	3	INGAVIRIN	0.7	0.8
9	11	CARDIOMAGNYL	0.7	0.6
10	9	PENTALGIN	0.6	0.6
Total			9.0	7.6

The top INN and generic names ranking leader changed (Table 3). RIVAROXABAN (+53%) moved up to rank one from two, displacing its former leader XYLOMETAZOLINE (+2%) to rank two. Another two newcomers were able to rise in the ranks. The newcomer APIXABAN (+84%), which broke into the top ten ranking for the first time, moved up to rank three and UMIFENOVIR (+25%) moved one rank up. The INNs BISOPROLOL (+2%), NIMESULIDE (+5%), PANCREATIN (+4%) and ETHYLMETHYLHYDROXYPYRIDINE (+9%) also fell in the ranks. The composition DIOSMIN*HESPERIDIN (+16%) and INN IBUPROFEN (+11%) held their previous ranks four and six. The total share of the top 10 increased from 10.5% to 12%.

Figure 3. The top 10 INNs and grouping names by pharmacy sales

Rank		INNs/Grouping Names	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	2	RIVAROXABAN	1.8	1.2
2	1	XYLOMETAZOLINE	1.5	1.6
3	15	APIXABAN	1.3	0.7
4	4	DIOSMIN*HESPERIDIN	1.3	1.1
5	3	BISOPROLOL	1.2	1.2
6	6	IBUPROFEN	1.1	1.0
7	5	NIMESULIDE	1.1	1.1
8	7	PANCREATIN	1.0	1.0
9	10	UMIFENOVIR	0.9	0.8
10	9	ETHYLMETHYLHYDROXYPYRIDINE	0.9	0.8
Total			12.0	10.5

Despite 2% reduction in sales, C09 Agents acting on the rennin-angiotensin system -6% continued to show the largest sales on the regional market among the top ATC groups (Table 4). The most dynamic group among the leaders B01 Antithrombotic agents (+36%) moved up to rank two from three, displacing M01 Anti-inflammatory and antirheumatic drugs (+6%) down one rank. Another three brands showed positive growth rates and rose in the ranks. R01 Nasal preparations (+5%), G03 Sex hormones (+7%) and C05 Vasoprotectives (+12%) moved up to ranks four, five and eight respectively. Group N06 Psychoanaleptics (+7%) rounding out the top ten also showed a growth in sales. N02 Analgesics (-0.2%), which held its previous rank 7, showed almost zero growth rates, while J05 Antivirals for systemic use (-6%) and J01 Antibacterials for systemic use (-10%) reduced both sales and ratings. In total, the top ten ATC groups accumulated 38.4% of the regional market, which was almost equal to the last year indicator (38,3%).

Figure 4. The top ten ATC Groups by pharmacy sales

Rank		ATC code	ATC group	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020			9 mon. 2021	9 mon. 2020
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.7	6.1
2	3	B01	ANTITHROMBOTIC AGENTS	5.4	4.1
3	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.1	5.1
4	6	R01	NASAL PREPARATIONS	3.5	3.5
5	8	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.3	3.2
6	4	J05	ANTIVIRALS FOR SYSTEMIC USE	3.2	3.6
7	7	N02	ANALGESICS	3.2	3.3
8	9	C05	VASOPROTECTIVES	3.2	3.0
9	5	J01	ANTIBACTERIALS FOR SYST USE	3.1	3.6
10	10	N06	PSYCHOANALEPTICS	2.8	2.8
Total				38.4	38.3

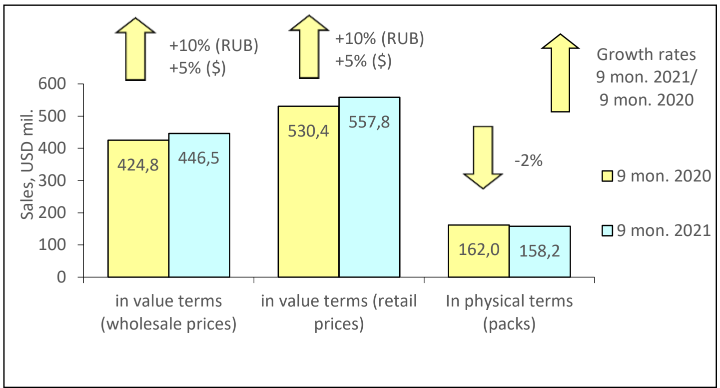
Conclusion. At the end of the first nine months of 2021, the pharmacy market of the Central Federal District (without Moscow) brought in RUB 176.233 bil. (USD 2.383 bil.), which was 6% in terms of roubles and 1% in terms of dollars more than in the same period of 2020. In pack terms, the market also showed negative growth rates (-7%) and achieved 685.972 mil. packs. In January-September of 2021, the average cost of an FPP pack in the regional pharmacies was USD 3.47, which was higher than the last year figure (USD 3.22), and less than the national average (USD 3.64). However, the average medicine expenses of the CFD residents were higher than the national average expenses in Russia (USD 89.61 vs. USD 78.79).

NWFD (EXCLUS. OF SAINT PETERSBURG) PHARMACY MARKET: 2021 FIRST NINE MONTHS RESULTS

According to Federal State Statistics Service, as of January 1, 2021, estimated population of the North-Western Federal District (NWFD) (exclus. of St. Petersburg) was 8.558 mil., which accounted for 5.9% of the total Russian Federation population. According to Federal State Statistics Service's data, the average wage in the NWFD (excl. of St. Petersburg) in January-September 2021 was RUB 60933 (USD 823.31), which was 12% higher than the average wage in Russia (RUB 54447).

According to the results of the Retail Audit of Finished Pharma Products (FPP) in the Russian Federation™ IQVIA, the sales of drugs in physical terms in the pharmacies of NWFD (excl. of St. Petersburg) saw a 2% decrease to 158.227 mil. packs based on the results for January-September 2021. In money terms, the market saw a 10% increase in terms of roubles and 5% - in terms of dollars. At the same time, the volume of the market achieved RUB 33.014 bil. (USD 446.451 mil.) at wholesale prices (Fig. 1). The share of the region accounted for 4.8% of the Russian retail pharmacy sales. The average cost of an OTC pack in the pharmacies increased: USD 3.53 vs. USD 3.27 at retail prices in the year-earlier period. The average amount spent by the residents of the region for FPPs in the pharmacies for nine months amounted to USD 65.19.

Figure 1. The NWFD (without St. Petersburg) pharmacy market for 9 months of 2020 – 9 months 2021



BAYER (+15%), OTCPHARM (+3%) and SERVIER (+4%) held their leading positions in the top ten manufacturers ranking in the pharmacy market of NWFD (exclusive of St. Petersburg) at the end of January-September period 2021 (Table 1). Another two manufacturers held their previous ranks: TEVA (+6%) and GEDEON RICHTER (+4%) placed at ranks seven and eight. Manufacturers STADA (+14%) and GLAXOSMITHKLINE (+26%) demonstrated outperformance growth rates and rating progress, moving up to ranks four and nine. Note that the latter became the only newcomer of the top-10 ranking. In contrast, SANOFI (-2%) and KRKA (-0.2%), as well as the manufacturer SANDOZ (+6%), which reduced their sales, lost one rank each and moved down to ranks five, six and the last rank, respectively. The cumulative share of the top 10 manufacturers reduced from 38% to 36.9%.

Figure 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	1	**BAYER**	5.2	5.0
2	2	OTCPHARM	4.2	4.5
3	3	**SERVIER**	3.9	4.2
4	6	**STADA**	3.9	3.7
5	4	**SANOFI**	3.7	4.1
6	5	**KRKA**	3.6	4.0
7	7	**TEVA**	3.4	3.5
8	8	GEDEON RICHTER	3.1	3.3
9	11	**GLAXOSMITHKLINE**	3.0	2.6
10	9	**SANDOZ**	2.9	3.0
Total			36.9	38.0

*AIPM members are in bold

The leader of the top ten brands didn't change: XARELTO (+40%) held and reinforced its previous rank one (Table 2). The most dynamic among the leaders ARBIDOL (+77%) moved up to rank two from three, ELIQUIS (+52%) moved up to three from four. The markets of the other three brands developed at a fast pace. DETRALEX (+18%) and CARDIOMAGNYL (+22%) moved up to ranks five and eight, and the newcomer MEXIDOL (+16%) broke into the top 10 ranking, rounding it out. At the same time, the less dynamic NUROFEN (+6%) and CONCOR (+1%), as well as LORISTA (-6%), which lowered its sales, on the contrary, moved down to ranks four, six and nine, respectively. The brand INGAVIRIN (+1%) as before held its previous rank seven. The total share of the top ten brands ranking increased by 1.1 p.p. and achieved 9.1%

Figure 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	1	XARELTO	1.5	1.2
2	3	ARBIDOL	1.4	0.9
3	4	ELIQUIS	1.2	0.9
4	2	NUROFEN	0.9	0.9
5	8	DETRALEX	0.8	0.7
6	5	CONCOR	0.8	0.8
7	7	INGAVIRIN	0.7	0.8
8	9	CARDIOMAGNYL	0.7	0.6
9	6	LORISTA	0.6	0.8
10	13	MEXIDOL	0.6	0.5
Total			9.1	8.0

In contrast to the above rankings, the leader of the top ten INNs and grouping names ranking changed (Table 3). RIVAROXABAN (+40%) moved up to rank one from four, UMIFENOVIR (+74%) moved up to rank two from nine. XYLOMETAZOLINE (+9%), which previously headed the rating, moved down to rank three, displacing IBUPROFEN (+8%) down one rank. In addition to the leaders, the markets of the composition DIOSMIN*HESPERIDIN (+18%), which held its previous rank five, as well as of the newcomers APIXABAN (+52%) and ROSUVASTATIN (+18%) developed at a fast pace. At the same time, NIMESULIDE and ATORVASTATIN lost two ranking points each despite an 11% increase in sales each for both. BISOPROLOL (+1%), which showed low growth rates, also fell in the ranks. In total, ten INNs and group names accounted for 12.2% against 11.0% in the year-earlier period.

Figure 3. The top 10 INNs and grouping names by pharmacy sales

Rank		INNs/Grouping Names	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	4	RIVAROXABAN	1.5	1.2
2	9	UMIFENOVIR	1.5	0.9
3	1	XYLOMETAZOLINE	1.4	1.4
4	3	IBUPROFEN	1.3	1.3
5	5	DIOSMIN*HESPERIDIN	1.2	1.1
6	2	BISOPROLOL	1.2	1.3
7	12	APIXABAN	1.2	0.9
8	6	NIMESULIDE	1.1	1.1
9	7	ATORVASTATIN	1.0	1.0
10	13	ROSUVASTATIN	0.9	0.8
Total			12.2	11.0

Most ATC groups from the top ten ATC groups ranking in the region's market held their previous ranks (Table 4). Among them were the top ten leaders C09 Agents acting on the renin-angiotensin system (+2%), M01 Anti-inflammatory and antirheumatic drugs (+9%), B01 Antithrombotic agents (+30%), G03 Sex hormones (+19%) and J05 Antivirals for systemic use (+8%), as well as R05 Cough and cold preparations (+10%), which rounded out the top ten ranking. Due to outperforming growth, the groups R01 Nasal preparations (+14%) and C05 Angioprotectives (+11%) moved up to ranks six and seven, while the less fast-moving groups N02 Analgesics (+0.4%) and J01 Antibacterials for systemic use (+2 %), on the contrary, moved to the lower ranks eight and nine, respectively. The top ten ATC groups accounted for 39.7% of the regional pharmacy sales, as in the previous year.

Figure 4. The top ten ATC Groups by pharmacy sales

Rank		ATC code	ATC group	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020			9 mon. 2021	9 mon. 2020
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	6.3	6.8
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.4	5.4
3	3	B01	ANTITHROMBOTIC AGENTS	4.7	4.0
4	4	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.2	3.9
5	5	J05	ANTIVIRALS FOR SYSTEMIC USE	3.7	3.8
6	7	R01	NASAL PREPARATIONS	3.4	3.3
7	9	C05	VASOPROTECTIVES	3.0	3.0
8	6	N02	ANALGESICS	3.0	3.3
9	8	J01	ANTIBACTERIALS FOR SYST USE	2.9	3.2
10	10	R05	COUGH AND COLD PREPARATIONS	2.9	2.9
Total				39.7	39.7

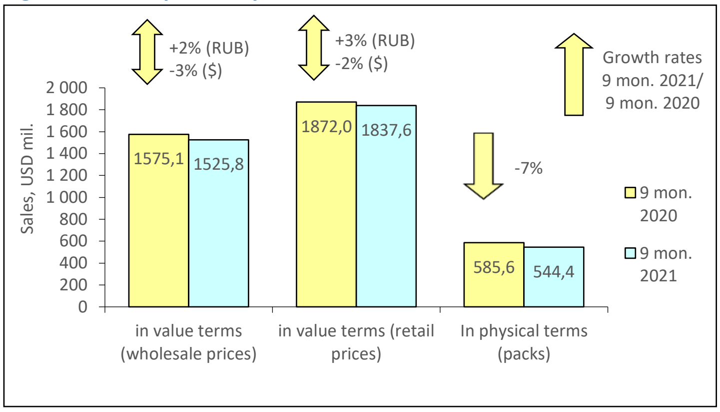
Conclusion. In January-September of 2021, the pharmacy market of the NWFD (without St Petersburg) brought in RUB 41.251 bil. (USD 557.833 mil.), which was 10% in terms of roubles and 5% in terms of dollars more than in the same period of 2020. In pack terms, the market reduced by 2% and amounted to 158.227 mil. packs. The average cost of FPP pack in the regional pharmacies based on the results for nine months of 2021 was USD 3.23, which was more than the 2020 figure. (USD 2.95), but lower than the national average (USD 3.64). The FPP expenses of the district residents were lower than the national average expenses throughout Russia (USD 65.19 vs USD 78.79).

VFD PHARMACY MARKET: 2021 FIRST NINE MONTHS RESULTS

According to the Federal State Statistics Service, as of January 1, 2021, estimated population of the Volga Federal District (VFD. 29.071 mil., which accounted for 19.9% of the total Russian Federation population. According to Federal State Statistics Service's data, in January-September 2021, the average salary in the VFD was RUB 39179 (USD 529.37), which was 28% lower than the national average wage in Russia (RUB 54447).

According to the results of the Retail Audit of OTC drugs in Russian Federation™ IQVIA, in January-September 2021 the pharmacy market of VFD in pack terms reduced by 7% to 544.443 mil. packs as compared to the previous year (Fig. 1) In wholesale prices the market grew by 2% in terms of roubles, but decreased by 3% in terms of dollars, reaching RUB 112.825 bil. (USD 1.526 bil.), A region's share in the total pharmacy sales in Russia accounted for 16%. Based on the results for the first nine months of 2021, the average cost of FPP in the VFD pharmacies increased compared with the year-earlier period (USD 3.20) and was equal to USD 3.38. The average per capita expenses for purchase of drugs in the pharmacies were estimated at USD 63.21.

Figure 1. Russia pharmacy market for 9 months of 2020 – 9 months 2021



Most of the top ten manufacturers showed negative growth rates in the retail market of the Volga Federal District based on the results for January-September 2021 (Table 1). The exceptions were OTCPHARM (+3%) and BAYER (+10%), which held their previous top two ranks, as well as STADA (+7%) and ABBOTT (+8%), which moved up to ranks three and seven. Three manufacturers managed to maintain their ranks despite the decline in sales. KRKA (-2%), TEVA (-4%) and BERLIN-CHEMIE/MENARINI (-14%) continued to hold their rank five, six and the last one. Three more manufacturers, SANOFI (-8%), SERVIER (-2%) and SANDOZ (-14%), lost one rating point each. The total share of the top ten brands decreased from 32.7% to 32.0%.

Figure 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	1	OTCPHARM	4.3	4.3
2	2	**BAYER**	4.2	3.9
3	4	**STADA**	3.5	3.4
4	3	**SANOFI**	3.4	3.8
5	5	**KRKA**	3.1	3.2
6	6	**TEVA**	2.9	3.1
7	9	**ABBOTT**	2.9	2.7
8	7	**SERVIER**	2.8	2.9
9	8	**SANDOZ**	2.4	2.9
10	10	**BERLIN-CHEMIE/MENARINI**	2.4	2.7
Total			32.0	32.7

*AIPM members are in bold

INGAVIRIN, which had been the leader in terms of sales volumes a year earlier, demonstrated a pronounced decrease in sales and fell in the ranks (-37%), rounding out the top ten brands ranking (Table 2). ACTOVEGIN (-2%) and NUROFEN (-1%), which moved down to ranks eight and nine, also demonstrated negative growth rates. On the contrary, the brands ARBIDOL (+42%), XARELTO (+47%) and ELIQUIS (2.1-fold increase in sales) as well as HEPTRAL, which broke into the top ten ranking for the first time (+41%), showed pronounced positive growth rates, which allowed the first three to move up to the first three ranks, while the latter ranked fifth and displaced PENTALGIN (+5%) down one rank. DETRALEX (+7%) also managed to improve its positions, moving up one rank to number seven. The brand MEXIDOL (+8%) held its previous rank four. The total share of the top 10 brands increased from 6.8% to 8.0%.

Figure 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	2	ARBIDOL	1.3	0.9
2	3	XARELTO	1.2	0.8
3	10	ELIQUIS	1.1	0.5
4	4	MEXIDOL	0.7	0.7
5	12	HEPTRAL	0.7	0.5
6	5	PENTALGIN	0.6	0.6
7	8	DETRALEX	0.6	0.6
8	6	ACTOVEGIN	0.6	0.6
9	7	NUROFEN	0.6	0.6
10	1	INGAVIRIN	0.6	0.9
Total			8.0	6.8

One newcomer broke into the ranks of the top ten INN and group names ranking: due to 2.1-fold growth in sales, APIXABAN moved up to rank four from 26 (Table 3). The other INNs of the top 10 ranking shifted their ranks; moreover, only three of them improved them. Among them was the top ten leader UMIFENOVIR (+47%), as well as RIVAROXABAN (+47%) и ETHYLMETHYLHYDROXYPYRIDINE (+11%), which moved up to ranks three and nine. On the contrary, XYLOMETAZOLINE (+5%), PANCREATIN (+7%) and NIMESULIDE (+5%) lost one rating point each, DIOSMIN* HESPERIDIN (+6%) and IBUPROFEN (+4%) lost two rating points each. INN BISOPROLOL (+3%) moved down from rank three to six. In total, the top ten INNs and group names accounted for 11.0% of the regional market vs 9.3% in the year-earlier period.

Figure 3. The top 10 INNs and grouping names by pharmacy sales

Rank		INNs/Grouping Names	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	2	UMIFENOVIR	1.6	1.1
2	1	XYLOMETAZOLINE	1.2	1.2
3	8	RIVAROXABAN	1.2	0.8
4	26	APIXABAN	1.1	0.5
5	4	PANCREATIN	1.1	1.0
6	3	BISOPROLOL	1.0	1.0
7	5	DIOSMIN*HESPERIDIN	1.0	1.0
8	6	IBUPROFEN	1.0	1.0
9	10	ETHYLMETHYLHYDROXYPYRIDINE	0.9	0.8
10	9	NIMESULIDE	0.9	0.8
Total			11.0	9.3

C09 Agents acting on the rennin-angiotensin system (+0.3%) and M01 Anti-inflammatory and antirheumatic products (+2%) held their previous top ranks in the top ten ATC group ranking (Table 4). B01 Antithrombotic agents, which increased sales by 30%, moved to rank three. At the same time, they displaced J05 Antivirals for systemic use (-6%) и J01 Antibacterials for systemic use (-9%) one rank down. There were no changes at the bottom of the ranking. Groups G03 Sex hormones (+2%), N02 Analgesics and N06 Psychoanaleptics (+1% each), R01 Nasal preparations (+4%) and S01 Ophthalmologicals (-2%) continued to hold their previous ranks six through ten respectively. In total, the top ten ATC groups accumulated 38.1% of the regional sales, which was almost equal to the last year indicator (38%).

Figure 4. The top ten ATC Groups by pharmacy sales

Rank		ATC code	ATC group	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020			9 mon. 2021	9 mon. 2020
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.6	5.6
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.1	5.1
3	5	B01	ANTITHROMBOTIC AGENTS	4.5	3.5
4	3	J05	ANTIVIRALS FOR SYSTEMIC USE	4.1	4.4
5	4	J01	ANTIBACTERIALS FOR SYST USE	3.6	4.0
6	6	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.5	3.5
7	7	N02	ANALGESICS	3.0	3.0
8	8	N06	PSYCHOANALEPTICS	3.0	3.0
9	9	R01	NASAL PREPARATIONS	3.0	2.9
10	10	S01	OPHTHALMOLOGICALS	2.8	2.9
Total				38.1	38.0

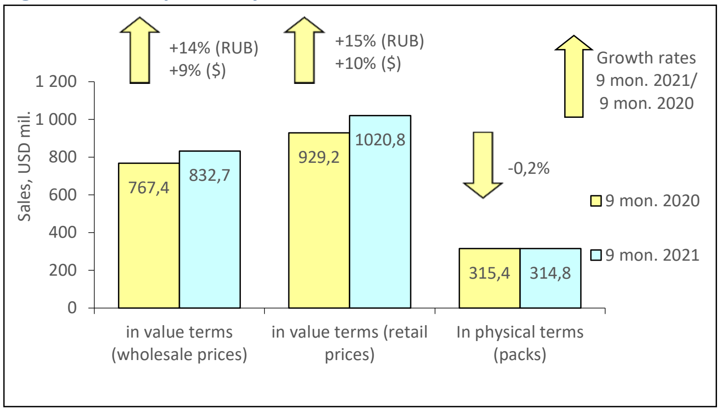
Conclusion. Based on the results for three quarter of 2021, the pharmacy market in VFD was estimated at RUB 135.877 bil. (USD 1.838 bil.) at retail prices. At the same time, the market behaviour was positive in rouble terms (+3%) and negative in dollar (-2%) terms. In physical terms, the sales reduced by 7% to 544.443 mil. packs. The average cost of OTC pack based on the results for January-September of 2021 was USD 3.38, which was higher compared to the previous period a year ago (USD 3.20) but lower the national average across Russia (USD 3.64). Per capita expenses of the district residents for purchase of medicines in the pharmacies were also lower than the national average figures (USD 63.21 vs. USD 78.79).

SOUTHERN FEDERAL DISTRICT PHARMACY MARKET: 2021 FIRST NINE MONTHS RESULTS

According to the Federal State Statistics Service, as of January 1, 2021, estimated population of the Southern Federal District (SoFD) was 16.482 mil., which accounted for 11.3% of the total Russian Federation population. According to Federal State Statistics Service's data, in January-September 2021, the average salary in the SoFD was RUB 38252 (USD 516.85), which was 30% lower than the national average wage in Russia (RUB 54447).

According to the results of the Retail Audit of Finished Pharma Products (FPP) in RF™ IQVIA, at the end of the first nine months of 2021, SoFD showed almost zero (-0.2%) growth rates of drug sales in physical terms, and its volume was equal to 314,778 mil. packs. In value terms, the market showed positive growth rates both in rouble equivalent (+14%) and in dollar equivalent (+9%) and reached RUB 61.565 bil. (USD 767.415 bil.) at wholesale prices (Fig. 1). The city market share accounted for 8.9% of the pharmacy sales in Russia. Based on the results for January-September of 2021, the average cost of a finished pharma product (FPP) pack was USD 3.24 at retail prices vs. USD 2.95 in a year-earlier period. The average amount spent by residents of the SoFD for drugs amounted to USD 61.93 for nine months of 2021.

Figure 1. Russia pharmacy market for 9 months of 2020 – 9 months 2021



Based on the results for three quarters of 2021, BAYER (+9%) continues to be the leader of the top 10 manufacturers in the market of the Southern Federal District, despite lagging growth and a decrease in its share (Table 1). OTCPHARM (+30%), the most dynamic among the leaders, moved up to rank two from three, displacing SANOFI (+1%) down one rank. Note that another two manufacturers of the top ten ranking rose in the ranks. ABBOTT (+24%) and BERLIN-CHEMIE/MENARINI (+11%) moved up to ranks five and seven, respectively. At the same time, the less dynamic SERVIER (+10%), TEVA (+3%) and SANDOZ (-0.1%) moved down to the lower ranks. STADA (+14%) and GLAXOSMITHKLINE (+7%) continue to hold rank four and the last rank respectively. In total, the top ten manufacturers accounted for 32.5% of the Russian market, whereas in the year– earlier period they had accounted for 33.3%.

Figure 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	1	**BAYER**	4.5	4.7
2	3	OTCPHARM	4.2	3.7
3	2	**SANOFI**	3.4	3.8
4	4	**STADA**	3.4	3.4
5	8	**ABBOTT**	3.2	2.9
6	5	**SERVIER**	3.1	3.2
7	9	**BERLIN-CHEMIE/MENARINI**	2.9	2.9
8	6	**TEVA**	2.8	3.1
9	7	**SANDOZ**	2.6	3.0
10	10	**GLAXOSMITHKLINE**	2.5	2.6
Total			32.5	33.3

*AIPM members are in bold

The leader of the top-10 brands ranking changed: due 2.7-fold growth in sales ELIQUIS moved up to rank one from seven (Table 2). ARBIDOL (2.1-fold growth) moved up to rank two from three, while XARELTO (+32%), which had previously headed the top 10 ranking, moved up to rank three, though it showed outperforming growth rates. In addition to the leaders, the other three brands moved up to yet higher ranks. DETRALEX (+33%) moved up one rank, coming in at number four. The brand PENTALGIN (+19%) improved its positions by two points, moving up to rank eight. The only newcomer of the top ten ranking, HEPTRAL (+64%) moved up to rank five. At the same time, the less dynamic NUROFEN (+12%), ACTOVEGIN (+10%) and MEXIDOL (+7%), as well as INGAVIRIN (-25%), which reduced its sales, moved down to ranks six, two last and seven, respectively. The top ten brands accumulated 8.8% of the regional market, whereas in the year-earlier period it was 7.1%.

Figure 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	6	ELIQUIS	1.5	0.6
2	3	ARBIDOL	1.4	0.8
3	1	XARELTO	1.2	1.0
4	5	DETRALEX	0.8	0.7
5	13	HEPTRAL	0.8	0.5
6	4	NUROFEN	0.7	0.7
7	2	INGAVIRIN	0.6	1.0
8	10	PENTALGIN	0.6	0.6
9	7	ACTOVEGIN	0.6	0.6
10	8	MEXIDOL	0.5	0.6
Total			8.8	7.1

Two newcomers broke into the ranks of the top ten INN and group names ranking: APIXABAN (2.7-fold increase in sales) and ADEMETIONINE (+51%) moved up to ranks three and ten (Table 3). INN UMIFENOVIR (+97%), which moved up from the last rank to the first one, headed the ranking. RIVAROXABAN (+32%) held and reinforced its previous rank four. The remaining INNs of the top 10, although showed, by and large, outstripping growth rates, however, fell in the ranks. The former top-10 leader XYLOMETAZOLINE (+15%) moved down one rank. INN PANCREATIN (+23%) and the combination DIOSMIN*HESPERIDIN (+25%) lost three ranks each, INN IBUPROFEN (+13%) and NIMESULIDE (+16%) lost two ranks each, while BISOPROLOL (+6%) lost in total one. At the same time, they moved down to ranks five through nine, respectively. The total share of the top-ten increased by 2 p.p. and achieved 11.9%.

Figure 3. The top 10 INNs and grouping names by pharmacy sales

Rank		INNs/Grouping Names	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	10	UMIFENOVIR	1.6	0.9
2	1	XYLOMETAZOLINE	1.5	1.5
3	16	APIXABAN	1.5	0.6
4	4	RIVAROXABAN	1.2	1.0
5	2	PANCREATIN	1.2	1.1
6	3	DIOSMIN*HESPERIDIN	1.1	1.0
7	5	IBUPROFEN	1.0	1.0
8	6	NIMESULIDE	1.0	1.0
9	8	BISOPROLOL	0.9	0.9
10	15	ADEMETIONINE	0.9	0.6
Total			11.9	9.9

M01 Anti-inflammatory and antirheumatic drugs (+15%) continue to show the largest sales volumes in the regional market (Table 4). B01 Antithrombotic agents (+41%), which showed the highest growth rates, moved up to rank two, while J05 Antivirals for systemic use (+17%) held their previous rank three. The markets of the other three ATC groups developed at a fast pace. J01 Antibacterials for systemic use (+15%) held their previous rank five, the newcomer A07 Antidiarrheals (+27%) moved up to rank eight, and C05 Angioprotectives (+17%) lost one point and rounded out the top ten. Groups R01 Nasal preparations and N02 Analgesics (+12% each) managed to move up one rank, while C09 Agents acting on the renin-angiotensin system (+3%) and G03 Sex hormones (+1%), on the contrary, moved down to ranks six, seven, four and nine, respectively. The total share of the top 10 increased from 37.6% to 38.7%.

Figure 4. The top ten ATC Groups by pharmacy sales

Rank		ATC code	ATC group	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020			9 mon. 2021	9 mon. 2020
1	1	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.1	5.0
2	4	B01	ANTITHROMBOTIC AGENTS	4.9	3.9
3	3	J05	ANTIVIRALS FOR SYSTEMIC USE	4.6	4.5
4	2	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	4.3	4.7
5	5	J01	ANTIBACTERIALS FOR SYST USE	4.2	3.8
6	7	R01	NASAL PREPARATIONS	3.3	3.4
7	8	N02	ANALGESICS	3.2	3.2
8	11	A07	ANTIDIARR.,INTEST. ANTIINFL./ ANTIINFECT. AGENTS	3.1	2.7
9	6	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.1	3.5
10	9	C05	VASOPROTECTIVES	3.0	2.9
Total				38.7	37.6

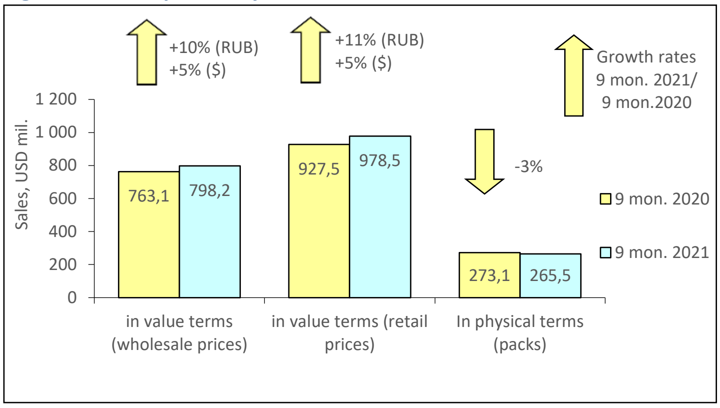
Conclusion. At the end of January-September of 2021, the retail pharmacy market of SoFD brought in RUB 75.471 bil. (USD 1.021 bil.) at retail prices. At the same time, the sales increased 15% in terms of roubles and 10% in terms of dollars. In pack terms, the market showed almost zero growth rates (-0.2%) and its volume amounted to 314.778 mil. packs. The average cost of an FPP pack in the pharmacies of the region amounted to USD 3.24, which was more than in the previous year (USD 2.95), but lower than the national average (USD 3.64). Based on the results for nine months of 2021, the average expenses of the SoFD residents for FPPs in the pharmacies were also lower than the national average (USD 61.93 vs. USD 78.79).

UFD PHARMACY MARKET: 2021 FIRST NINE MONTHS RESULTS

According to Federal State Statistics Service, as of January 1, 2021, estimated population of the Ural Federal District (UFD) was 12.330 mil., which accounted for 8.4% of the total Russian Federation population. According to Federal State Statistics Service's data, in January-September 2021, the average salary in the UFD was RUB 58145 (USD 788.61), which was 7% higher than the average wage in Russia (RUB 54447).

According to the results of the Retail Audit of Over-the-Counter Drugs (OTC) in Russian Federation™ IQVIA, at the end of the first nine months of 2021 the sales of OTC drugs in natural terms in the pharmacies of UFD saw a 3% decrease to 265.529 mil. packs. In value terms, the market showed positive growth rates (+10%) both in rouble terms, and in dollar terms (+5%), and reached RUB 59.054 bil. (USD 798.228 mil.) in wholesale prices (Fig. 1). The regional retail sales share accounted for 8.5% of all pharmacy sales in Russia. The average retail cost of an FPP pack was USD 3.69 in January-September 2021 against USD 3.40 in the year-earlier period. In the analysed period, the average amount spent by residents of the UFD for drugs amounted to USD 79.36.

Figure 1. Russia pharmacy market for 9 months of 2020 – 9 months 2021



The top ten manufacturers in the retail market of the Ural Federal District remained stable in terms of composition at the end of January-September 2021 (Table 1). Its leaders have not changed either - BAYER and OTCPHARM (+10% each) continued to hold the top lines of the top 10 ranking. ABBOTT and GEDEON RICHTER (+10% each), which showed the same growth rates, moved up to ranks six and eight, respectively STADA (+13%) and KRKA (+9%) also moved up to the higher ranks three and nine. At the same time, they displaced SANOFI (+1%) and SERVIER (+5%) down one rank. Due to 5% reduction in sales, SANDOZ moved down to the bottom of the top ten. The manufacturer TEVA (+6%) continued to hold rank five. The total share of the top 10 drug manufacturers reduced from 33.9% to 33.1%.

Figure 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	1	**BAYER**	4.5	4.4
2	2	OTCPHARM	4.1	4.1
3	4	**STADA**	3.8	3.7
4	3	**SANOFI**	3.6	3.9
5	5	**TEVA**	3.2	3.3
6	8	**ABBOTT**	2.9	2.9
7	6	**SERVIER**	2.9	3.0
8	9	GEDEON RICHTER	2.7	2.7
9	10	**KRKA**	2.7	2.7
10	7	**SANDOZ**	2.6	3.0
Total			33.1	33.9

*AIPM members are in bold

Two newcomers broke into the ranks of the top ten brands for the first time (Table 2). ACTOVEGIN (+11%) and LORISTA (+7%) rounded out the top ten ranking. The other five brands from the top ten brands ranking developed their markets at a fast pace: ARBIDOL (+45%) and DETRALEX (+11%) kept their previous ranks one and four, and XARELTO (+41%), ELIQUIS (+75%) and HEPTRAL (+38%) moved up to ranks two, three and five. PENTALGIN (+7%), which occupied rank 7, demonstrated positive dynamics, while NUROFEN (-1%) and INGAVIRIN (-36%) moved down to ranks six and eight, respectively, due to lower sales. The total share of the "ten" was equal to 7.0%, a year earlier to 6.4%.

Figure 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	1	ARBIDOL	1.2	0.9
2	3	XARELTO	1.1	0.8
3	8	ELIQUIS	0.8	0.5
4	4	DETRALEX	0.7	0.7
5	9	HEPTRAL	0.7	0.5
6	5	NUROFEN	0.6	0.7
7	7	PENTALGIN	0.5	0.5
8	2	INGAVIRIN	0.5	0.9
9	13	ACTOVEGIN	0.5	0.5
10	11	LORISTA	0.5	0.5
Total			7.0	6.4

Most of the top ten INNs and grouping names ranking demonstrated outstripping growth rates (Table 3). Among them were its leaders UMIFENOVIR (+46%), XYLOMETAZOLINE and DIOSMIN*HESPERIDIN (+12% each), as well as RIVAROXABAN (+41%). At the same time, the former and the latter moved up to these ranks from lower ones, while the other two have lost one ranking point each. ROSUVASTATIN (+26%) moved up to rank seven from ten, whereas the newcomers of the top ten APIXABAN (+75%) and ADEMETIONINE (+32%) moved up to two bottom ranks of the top ten ranking. The brands PANCREATIN (+8%), IBUPROFEN (+9%) and NIMESULIDE (+10%) lost two ranks each, moving down to ranks five, six and eight, respectively. The cumulative share of the top10 increased from 9.1% to 10.3%.

Figure 3. The top 10 INNs and grouping names by pharmacy sales

Rank		INNs/Grouping Names	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	5	UMIFENOVIR	1.3	1.0
2	1	XYLOMETAZOLINE	1.3	1.3
3	2	DIOSMIN*HESPERIDIN	1.2	1.1
4	8	RIVAROXABAN	1.1	0.8
5	3	PANCREATIN	1.0	1.0
6	4	IBUPROFEN	1.0	1.0
7	10	ROSUVASTATIN	0.9	0.8
8	6	NIMESULIDE	0.9	0.9
9	26	APIXABAN	0.8	0.5
10	13	ADEMETIONINE	0.8	0.7
Total			10.3	9.1

C09 Agents acting on the rennin-angiotensin system (+9%) and M01 Anti-inflammatory and antirheumatic products (+10%) held their previous top ranks in the top ten ATC group ranking (Table 4). J05 Antivirals for systemic use, which had made the top three ATC groups, moved down to rank five due to a 6% decrease in sales, leaving behind G03 Sex hormones (+7%) and B01 Antithrombotic agents (+25%). J01 Antibacterials for systemic use (-3%) also saw a decrease in sales, which resulted in the loss of two rating points. C05 Angioprotectives (+7%) moved down one rank, coming in at rank ten. They were squeezed out by the more dynamic group A11 Vitamins (+23%), which broke into the top ten ranking for the first time. R01 Nasal preparations (+15%), which moved up to rank six, also demonstrated outperforming growth rates and rose in the ranks. Group N02 Analgesics (+5%) continued to hold rank eight In total, the top ten ATC-groups accumulated 36.9% of the regional market, whereas in the year-earlier period they accounted for 37.3%.

Figure 4. The top ten ATC Groups by pharmacy sales

Rank		ATC code	ATC group	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020			9 mon. 2021	9 mon. 2020
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.2	5.3
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.1	5.1
3	4	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.0	4.1
4	6	B01	ANTITHROMBOTIC AGENTS	3.8	3.4
5	3	J05	ANTIVIRALS FOR SYSTEMIC USE	3.8	4.4
6	7	R01	NASAL PREPARATIONS	3.4	3.2
7	5	J01	ANTIBACTERIALS FOR SYST USE	3.0	3.4
8	8	N02	ANALGESICS	3.0	3.1
9	14	A11	VITAMINS	2.8	2.5
10	9	C05	VASOPROTECTIVES	2.8	2.9
Total				36.9	37.3

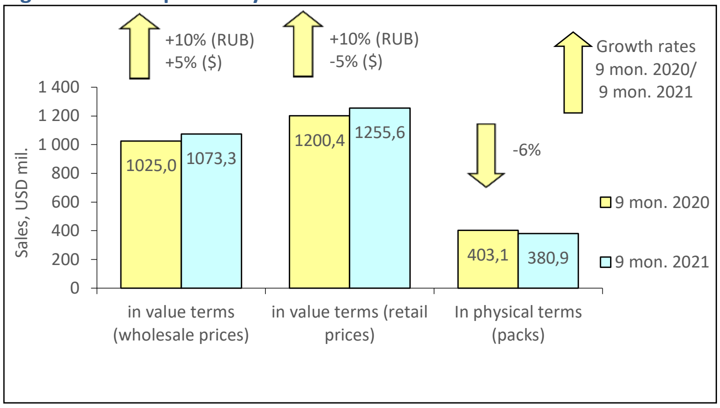
Conclusion. In January-September 2021, the pharmacy market of the Ural Federal District brought in RUB 72.385 bil. (USD 978.486 mil.) at retail prices. The regional sales increased by 11% in rouble terms and 5% in dollar terms. In physical terms, the market showed negative growth rates (-3%) and amounted to 265.529 mil. packs. The average cost of an OTC pack in the regional pharmacies based on the results for nine months of 2021 was USD 3.69, which was higher than the last year figures (USD 3.40), and the national average (USD 3.64). The average expenses of the UFD residents for medications in the pharmacies were higher than the national average (USD 79.36 vs. USD 78.79).

SiFD PHARMACY MARKET: 2021 FIRST NINE MONTHS RESULTS

According to Federal State Statistics Service, as of January 1, 2021, estimated population of the Siberian Federal District (SiFD. 17.004 mil., which accounted for 11.6% of the total Russian Federation population. According to Federal State Statistics Service's data, in January-September 2021, the average salary in the SiFD was RUB 46753 (USD 631.71), which was 14% lower than the national average wage in Russia (RUB 54447).

According to the results of the Retail Audit of OTC drugs in Russian Federation™ IQVIA, in January-September 2021 the pharmacy market of SiFD in pack terms reduced by 6% to 380.858 mil. packs and amounted to 380.858 mil. packs (Fig. 1) In wholesale prices the sales grew by 10% in terms of roubles, but decreased by 5% in terms of dollars, reaching RUB 79.390 bil. (USD 1.073 bil.), The district's share accounted for 10.9% of the total pharmacy sales in the Russian pharmacy market pattern. At the end of 9 months of 2021, the average cost of an FPP pack in the SiFD pharmacies was USD 3.30, whereas in the year-earlier period its cost was USD 2.98. In January-September 2021, per capita expenses of the SiFD residents for purchase of medicines in pharmacies amounted to USD 73.84.

Figure 1. Russia pharmacy market for 9 months of 2020 – 9 months 2021



The top 10 manufacturers in the pharmacy market of the Siberian Federal District at the end of January-September 2021 demonstrated unique stability - all of its manufacturers held their own in the ranking (Table 1). The changes affected only the market shares of the top ten manufacturers. The leaders of the ranking BAYER (+12%) and OTCPHARM (+13%), as well as ABBOTT (+17%) placed at rank nine, managed to rise in the ranks. The market share of STADA, which showed an 11% increase in sales, remained unchanged, while the share of the remaining manufacturers decreased due to the lagging growth rates. At the same time, the manufacturers TEVA, KRKA and GEDEON RICHTER increased sales by 5%, while SANOFI, SERVIER and SANDOZ increased them by 4%. The total share of the top 10 manufacturers has reduced from 34.3% to 33.8%

Figure 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	1	**BAYER**	4.6	4.5
2	2	OTCPHARM	4.1	3.9
3	3	**STADA**	3.9	3.9
4	4	**SANOFI**	3.7	3.9
5	5	**SERVIER**	3.2	3.4
6	6	**TEVA**	3.2	3.3
7	7	**KRKA**	3.1	3.2
8	8	**SANDOZ**	2.8	3.0
9	9	**ABBOTT**	2.8	2.6
10	10	GEDEON RICHTER	2.5	2.6
Total			33.8	34.3

*AIPM members are in bold

Numerous shifts took place in the ranks of the top ten brands ranking (Table 2). ARBIDOL (+60%) moved into the lead, while XARELTO (+32%), which previously headed the top 10, showed high growth rates, but moved up to rank three. The more dynamic ELIQUIS (+93%), which broke into the top 10 for the first time, was ranked second. Another two newcomers, MEXIDOL (+15%) and HEPTRAL (+56%), moved up to ranks eight and ten, respectively. Also, DETRALEX (+18%), CARDIOMAGNYL (+10%) and NUROFEN (+1%) moved up to ranks four, six and nine. At the same time, the brands LORISTA (-0.1%) and PENTALGIN (+4%) lost one rating point each. In total, the top ten manufacturers accumulated 7.7% of sales vs 6.6% in the year-earlier period.

Figure 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	2	ARBIDOL	1.2	0.8
2	11	ELIQUIS	1.1	0.6
3	1	XARELTO	1.0	0.8
4	5	DETRALEX	0.8	0.7
5	4	LORISTA	0.7	0.7
6	9	CARDIOMAGNYL	0.6	0.6
7	6	PENTALGIN	0.6	0.7
8	12	MEXIDOL	0.6	0.6
9	10	NUROFEN	0.6	0.6
10	23	HEPTRAL	0.6	0.4
Total			7.7	6.6

UMIFENOVIR (+63%) became the leader of the top ten INNs and group names ranking, following its respective brand (Table 3). In addition, another three INNs of the top ten ranking managed to rise in the ranks. At the same time, the composition DIOSMIN*HESPERIDIN (+16%) and the brand RIVAROXABAN (+32%) moved up one rank, to numbers three and seven, while the more dynamic APIXABAN (+93%) broke into the top ten ranking for the first time, moving up to rank four. The growth rates of the remaining INNs lagged behind the market average, which resulted in moving down to the lower ranking positions. XYLOMETAZOLINE (+4%), BISOPROLOL (+1%), IBUPROFEN (+6%), NIMESULIDE (+9%), LOSARTAN (+4%) and PANCREATIN (+9%) moved down to numbers two, five and the last three ranks, respectively. The cumulative share of the top-ten increased by 1 p.p. and achieved 10.7%.

Figure 3. The top 10 INNs and grouping names by pharmacy sales

Rank		INNs/Grouping Names	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	5	UMIFENOVIR	1.4	0.9
2	1	XYLOMETAZOLINE	1.4	1.5
3	4	DIOSMIN*HESPERIDIN	1.1	1.1
4	21	APIXABAN	1.1	0.6
5	2	BISOPROLOL	1.1	1.1
6	3	IBUPROFEN	1.0	1.1
7	8	RIVAROXABAN	1.0	0.8
8	6	NIMESULIDE	0.9	0.9
9	7	LOSARTAN	0.8	0.9
10	9	PANCREATIN	0.8	0.8
Total			10.7	9.8

The top three groups from the top-10 ATC groups ranking remained unchanged (Table 4). C09 Agents acting on the rennin-angiotensin system (+5%), M01 Anti-inflammatory and antirheumatic products (+11%) and G03 Sex hormones (+13%) as before held their previous top three ranks. As before, C05 Angioprotectives (+11%) and R05 Cough and cold preparations (+13%) rounded out the top ten ranking. B01 Antithrombotic agents (+26%) showed high growth rates and rose in the ranks, moving up from rank six to four. R01 Nasal preparations (+11%) improved their ranks by one point. At the same time, the groups J05 Antivirals for systemic use (+5%), N02 Analgesics (+2%) and J01 Antibacterials for systemic use (+3%) lost one rank each, coming in at numbers five, six and eight, respectively. The share of the top ten ATC groups remained virtually unchanged. 37,7%, vs 37,8% in the year-earlier period.

Figure 4. The top ten ATC Groups by pharmacy sales

Rank		ATC code	ATC group	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020			9 mon. 2021	9 mon. 2020
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.4	5.6
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.2	5.2
3	3	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.2	4.1
4	6	B01	ANTITHROMBOTIC AGENTS	4.0	3.5
5	4	J05	ANTIVIRALS FOR SYSTEMIC USE	3.5	3.7
6	5	N02	ANALGESICS	3.3	3.6
7	8	R01	NASAL PREPARATIONS	3.3	3.2
8	7	J01	ANTIBACTERIALS FOR SYST USE	3.1	3.3
9	9	C05	VASOPROTECTIVES	2.9	2.8
10	10	R05	COUGH AND COLD PREPARATIONS	2.8	2.7
Total				37.7	37.8

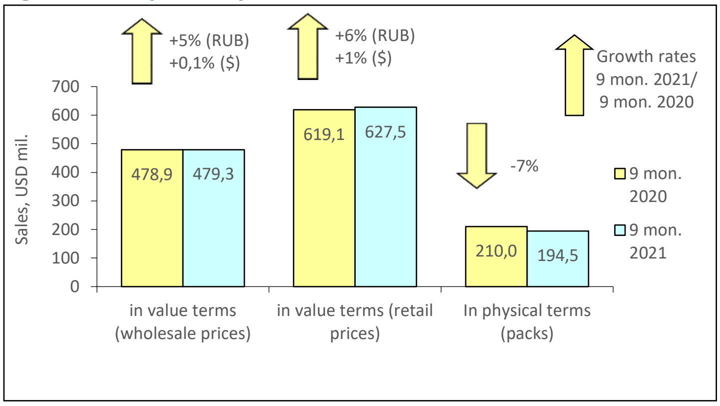
Conclusion. At the end of three quarters of 2021, the pharmacy market in the Siberian Federal District was estimated at RUB 92.870 bil. (USD 1.256 bil.) at final consumer prices. At the same time, the market behaviour was positive both in rouble (+10%) and dollar (+5%) terms. In physical terms, the sales increased by 6% and amounted to 380.858 mil. packs. The average cost of an FPP pack grew as compared to a year earlier (USD 3.30 vs. USD 2.98) but continued to be lower than the national FPP price average in Russia (USD 3.64). Per capita expenses of the district residents for purchase of medicines in the pharmacies were also lower than the national average figures (USD 73.84 vs. USD 78.79).

FEFD PHARMACY MARKET: 2021 FIRST NINE MONTHS RESULTS

According to Federal State Statistics Service, as of January 1, 2021, estimated population of the Far Eastern Federal District (FEFD) was 8.124 mil., which accounted for 5.6% of the total Russian Federation population. According to Federal State Statistics Service's data, based on the results for January-September 2021, the average wage in the FEFD (with Moscow) was RUB 63064 (USD 852.10), which was 16% higher than the average wage in Russia (RUB 54447).

According to the results of the Retail Audit of Over-the-Counter Drugs (OTC) in Russian Federation™ IQVIA, at the end of the first nine months of 2021 the sales of OTC drugs in natural terms in the pharmacies of FEFD saw a 7% decrease to 194.529 mil. packs. In money terms, the market saw a 5% increase in terms of roubles, and (+0.1%) in terms of dollars. At the same time, the volume of the market amounted to RUB 35.457 bil. (USD 479.339 mil.) at wholesale prices (Fig. 1). The district's share accounted for 5.4% of the all-Russia sales in retail prices. The average cost of a pack increased as compared to a year earlier period (USD 2.95) and was equal to USD 3.23. At the end of three quarters of 2021, an average amount spent by the FEFD region residents for the drugs in the pharmacies amounted to USD 77.25.

Figure 1. FEFD pharmacy market for 9 months of 2020 – 9 months 2021



Based on the results for the first nine months of 2021 the top manufacturers ranking in the retail market of the Far Eastern Federal District remained stable in terms of composition (Table 1). The top ten ranking did not change its leader either. BAYER (+10%) held and reinforced its previous rank one. In addition to it, KRKA (+3%), SANOFI (-1%) and GLAXOSMITHKLINE (+2%) also held their previous ranks four, eight and ten. Note that three similar shifts took place in the top 10 ranking. Thus, OTCPHARM (+8%), which showed outperforming growth rates, moved up one rank, to number three, displacing STADA (+5%) to rank three. The manufacturer SERVIER (+3%) moved up to rank six, displacing the less dynamic TEVA (+1%) one rank down. GEDEON RICHTER (+1%), which showed the same growth rates, moved one rank up, coming in at number eight, displacing SANDOZ (-0.1%) to number nine. The aggregate share of the top-10 reduced from 35.3% to 34.9%.

Figure 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	1	**BAYER**	4.8	4.6
2	3	**OTCPHARM**	4.2	4.1
3	2	**STADA**	4.1	4.1
4	4	**KRKA**	3.4	3.5
5	5	**SANOFI**	3.2	3.4
6	7	**SERVIER**	3.2	3.3
7	6	**TEVA**	3.2	3.3
8	9	GEDEON RICHTER	3.1	3.2
9	8	**SANDOZ**	3.0	3.2
10	10	**GLAXOSMITHKLINE**	2.7	2.8
Total			34.9	35.3

*AIPM members are in bold

Only its leader ARBIDOL (+45%) managed to maintain its position in the top 10 brands ranking (Table 2). Among the remaining brands, another four brands rose in the ranks. XARELTO (+39%), DETRALEX (+22%) and CARDIOMAGNYL (+3%), which moved up to ranks two, five and seven, as well as ELIQUIS, which broke into the top 10 for the first time, moved up to rank three (2.2-fold increase in sales). At the same time, they pushed the brands NUROFEN (+1%) and LORISTA (+2%) down one rank, to numbers four and six. THERAFLU (-6%), CONCOR (-7%) and MIRAMISTIN (-9%) reduced their sales and moved down to the last three lines of the top ten. The aggregate share of the top-10 expended from 7.3% to 8.2%.

Figure 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	1	ARBIDOL	1.5	1.1
2	4	XARELTO	1.1	0.8
3	27	ELIQUIS	0.9	0.4
4	3	NUROFEN	0.8	0.8
5	10	DETRALEX	0.7	0.6
6	5	LORISTA	0.7	0.7
7	8	CARDIOMAGNYL	0.7	0.7
8	6	THERAFLU	0.6	0.7
9	7	CONCOR	0.6	0.7
10	9	MIRAMISTIN	0.6	0.7
Total			8.2	7.3

In contrast to the above rankings, the leader of the top ten INNs and grouping names ranking changed (Table 3). UMIFENOVIR (+47%) moved up to rank one from three, displacing XYLOMETAZOLINE (-8%) and IBUPROFEN (+3%) one rank down. The other three INNs moved up to the higher positions following the leader. Thus, RIVAROXABAN (+39%) and DIOSMIN*HESPERIDIN (+20%) moved up to ranks four and five from nine and seven, while APIXABAN, the only newcomer of the top 10, moved up to rank nine (2.2-fold increase in sales). BISOPROLOL, which reduced its sales by 2% and NIMESULIDE (+1%), which showed low growth rates, on the contrary, moved down to ranks six and seven. PANCREATIN (+4%) and DICLOFENAC (+0.5%) continued to hold ranks eight and ten. The cumulative share of the top-10 expended from 10. 2% to 11.1%.

Figure 3. The top 10 INNs and grouping names by pharmacy sales

Rank		INNs/Grouping Names	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020		9 mon. 2021	9 mon. 2020
1	3	UMIFENOVIR	1.7	1.2
2	1	XYLOMETAZOLINE	1.5	1.7
3	2	IBUPROFEN	1.3	1.3
4	9	RIVAROXABAN	1.1	0.8
5	7	DIOSMIN*HESPERIDIN	1.1	0.9
6	4	BISOPROLOL	1.0	1.1
7	6	NIMESULIDE	0.9	0.9
8	8	PANCREATIN	0.9	0.9
9	40	APIXABAN	0.9	0.4
10	10	DICLOFENAC	0.8	0.8
Total			11.1	10.2

M01 Anti-inflammatory and antirheumatic products (+5%) became the best-selling group on the regional market, displacing C09 Agents acting on the renin-angiotensin system (+1%) from the leading positions (Table 4). J05 Antivirals for systemic use (-5%) held their previous rank three, despite the negative growth rates. The most dynamic among the top ten ATC groups B01 Antithrombotic agents (+27%) moved up to rank four from eight. At the same time, it moved down one rank, to ranks five through eight, groups G03 Sex hormones (+4%), R01 Nasal preparations (+1%), J01 Antibacterials for systemic use (-1%) and N02 Analgesics (-4%). R05 Cough and cold preparations (+2%) also lost one point, being displaced by more dynamic C05 Angioprotectives (+13%). The total share of the analysed ranking accounted for 37.1% against 37.6% in a year-earlier period.

Figure 4. The top ten ATC Groups by pharmacy sales

Rank		ATC code	ATC group	Share in total pharmacy sales, %	
9 mon. 2021	9 mon. 2020			9 mon. 2021	9 mon. 2020
1	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.0	4.9
2	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	4.9	5.1
3	3	J05	ANTIVIRALS FOR SYSTEMIC USE	4.0	4.5
4	8	B01	ANTITHROMBOTIC AGENTS	3.8	3.2
5	4	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.8	3.8
6	5	R01	NASAL PREPARATIONS	3.6	3.7
7	6	J01	ANTIBACTERIALS FOR SYST USE	3.4	3.6
8	7	N02	ANALGESICS	3.1	3.4
9	10	C05	VASOPROTECTIVES	2.8	2.6
10	9	R05	COUGH AND COLD PREPARATIONS	2.8	2.8
Total				37.1	37.6

Conclusion. In January-September 2021, the pharmacy market of the Far Eastern Federal District brought in RUB 46.421 bil. (USD 627.549 mil.), which was 6% in terms of roubles and 1% in terms of dollars more than in the same period of 2020. In pack terms, the market reduced (-7%) and amounted to 194.529 mil. packs. Based on the results for the first nine months of 2021, the average cost of FPP pack in the FEFD pharmacies was USD 3.23, which was higher than in the year-earlier period (USD 2.95), but lower than the national average (USD 3.64). The average medicine expenses of the district residents were also lower than the national average expenses in Russia (77.25 USD vs. 78.79 USD).