СОВМЕСТНАЯ ПУБЛИКАЦИЯ
АССОЦИАЦИИ МЕЖДУНАРОДНЫХ
ФАРМАЦЕВТИЧЕСКИХ
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AIPM®
Association of International Pharmaceutical Manufacturers
Ассоциация международных фармацевтических производителей

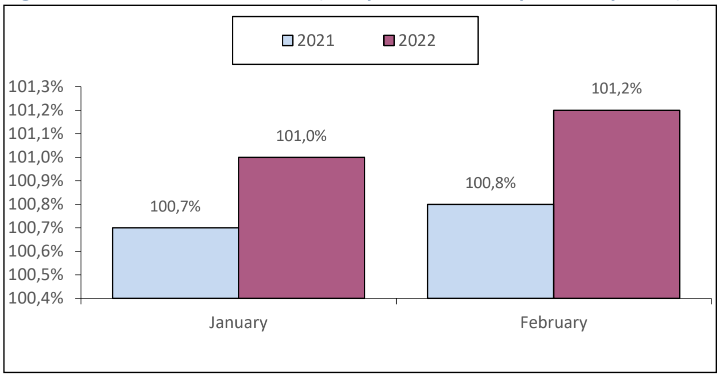
MACROECONOMIC INDICES

Inflation

According to Federal State Statistics Service's data, the Consumer Price Index was estimated as 101.2% in February 2022 compared to the previous month, 102.2% against December 2021.

In February 2022, Industrial Producer Price Index was 103.9% as compared to the previous month, in the month-earlier period it had amounted to 100.0%. The index accounted for 103.9% against December of 2021.

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



Living standard

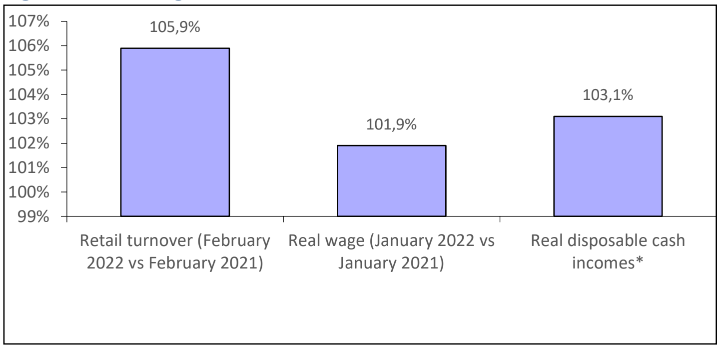
In January 2022, a gross monthly average wage of corporate employees reached RUB 55717 (USD 734.37). It increased by 110.8% compared to January 2021, and 71.2% compared to the previous period. In January 2022, the real gross wage accounted for 101.9% as compared to January 2021, and 70.5% against the prior period.

According to estimates[1], real disposable cash incomes increased by 3.1% in 2021 as compared to 2020 (Fig. 2).

Retail turnover

In February 2022, the retail turnover was equal to RUB 3245.4 bil. or 105.9% (in comparable prices) against the respective period of the previous year, and RUB 6458.8 bil. or 104.7% in January - February 2022 (Fig. 2).

Figure 2. Real wage and retail turnover



* January-December 2021 vs. January-December 2020.

Industrial Production

According to Federal State Statistics Service's data, Industrial Production Index accounted for 106.3% in February 2022 compared to the same period in the previous year, and 107.5% in January-February 2022.

According to Federal State Statistics Service's data, Industrial Production Index of drugs and medical products for human use accounted for 127.7% in February 2022 as compared to the relevant period of 2021, and 117.4% against January-February 2021.

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 January 2022.

Figure 1. The top ten Russian chemical and pharmaceutical manufacturers by sales volume in January 2022.

Rank	Manufacturer	RUB mil.
1	Otcpharm	6476.9
2	Biocad	4815.5
3	Generium	4233.1
4	Valenta	3421.4
5	R-Pharm	3000.4
6	Stada	2851.1
7	Binnopharm	2175.5
8	Grotex	1768.6
9	Pharmasyntez	1708.3
10	Pharmstandart	1664.5

Source - Remedium according to IQVIA's data

Table 2 provides pharmacy sales data from 10 regions of the Russian Federation. Reduction in sales (in terms of roubles) was reported in all regions in January 2022 compared to the previous month. The most pronounced reduction was observed in Novosibirsk region (-24%), the least pronounced one in Rostov Region and Perm (-15%).

Figure 2. Pharmacy sales in the regions, 2021-2022

Region	Pharmacy sales, $ mil. (wholesale prices)			Growth gain, % (roubles)		
	November 2021	December 2021	January 2021	November/ October 21	December /November 21	January 22/ December 21
Moscow	198.6	235.2	178.8	3%	20%	-22%
St. Petersburg	92.6	105.7	81.6	4%	16%	-21%
Krasnodar Krai	51.7	61.4	49.3	-13%	21%	-17%
Krasnoyarsk Krai	31.1	32.5	25.7	4%	6%	-19%
Tatarstan	29.9	30.6	23.8	-14%	4%	-20%
Rostov Region	33.0	35.0	28.8	-10%	7%	-15%
Novosibirsk Region	30.4	33.9	25.2	4%	13%	-24%
Voronezh Region	20.4	21.4	16.5	-20%	7%	-21%
Perm	10.5	11.7	9.7	-6%	13%	-15%
Tyumen	10.5	10.9	8.5	-3%	5%	-20%

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 February 2022

Rank	Company*	Quantity of broadcasts
1	Otcpharm	9,930
2	Materia Medica	7,609
3	GSK Consumer Healthcare	6,975
4	Sanofi	6,419
5	Abbott Laboratories S.A.	6,299

Source - Remedium according to Mediascope's data

Figure 4. Top five brand names in mass media in February 2022

Rank	Brand*	Quantity of broadcasts
1	Ergoferon	2,892
2	Otrivin	2,521
3	Theraflu	2,464
4	Rengalin	2,434
5	Nasivin	2,055

Source - Remedium according to Mediascope's data

* Only drugs registered with National Medicine Register were considered.

[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.

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

According to DLO in RF™ IQVIA, the drug supplies under the Federal Program amounted to RUB 114.447 bail. on the basis of the results for 2021 (USD 1.546 bil.) at contractual prices. The sector volume increased by 12% in terms of roubles and 6% in terms of dollars as compared to 2020. Scope of supplies in pack terms decreased by 6% to 64.934 mil. packs. The average cost of a FPP pack through the DLO program was USD 23.81 in contractual prices (a year ago it was USD 20.97).

GENERIUM (+18%[2]) and TAKEDA (+11%) held their leading positions in the DLO segment based on the results for 2021 (Table 1). The markets of JOHNSON & JOHNSON (+29%) and ROCHE (5.1-fold growth in purchases) developed at a fast pace, which allowed them to move up to ranks three and five, respectively. On top of that, the latter became the only newcomer of the top ten ranking. In contrast, almost all of the remaining top 10 drug manufacturers lost one rank position each. CELGENE (-17%), NOVARTIS (+2%), SANOFI (-8%), OCTAPHARMA (+4%) and NOVO NORDISK (-14%) moved down to ranks four, and from seven through ten, respectively. Despite the positive growth rates BIOCAD (+5%) moved down two ranks, coming in at number six. The total share of the top 10 drug manufacturers within DLO Program expanded from 60.8% to 62.6%.

Figure 1. The top 10 drug manufacturers for DLO

Rank in the top ten		Manufacturer*	Share in total DLO volume, %	
2021	2020		2021	2020
1	1	GENERIUM ZAO RF	11.6	11.0
2	2	**TAKEDA**	10.1	10.2
3	5	**JOHNSON & JOHNSON**	7.4	6.4
4	3	**CELGENE**	7.0	9.4
5	18	**ROCHE**	6.7	1.5
6	4	BIOCAD RF	6.2	6.6
7	6	**NOVARTIS**	4.3	4.7
8	7	**SANOFI**	3.6	4.4
9	8	OCTAPHARMA	3.1	3.3
10	9	**NOVO NORDISK**	2.5	3.3
Total			62.6	60.8

*AIPM members are in bold

REVLIMIDE (-17%) and ELIZARIA (+33%) held the top two positions in the top ten brands ranking (Table 2). DARZALEX (+26%) also held its previous rank seven. Five ATC groups of the remaining top 10 INNs and group names rose in the ranks. These were the newcomers that broke into the top ten ranking OCREVUS (2,500-fold growth in purchases), OCTOFACTOR (+90%) и HEMLIBRA (178-fold growth), as well as ADVATE (+41%) and TYSABRI (+35%), which moved up to ranks four and eight. Another two brands with negative growth rates ELAPRASE (-4%) and ACELLBIA (-5%) moved down to ranks six and nine, respectively. The total share of the top 10 ranking grew from 27.2% to 32.6%.

Figure 2. The top 10 Brands in DLO segment

Rank in the top ten		Brand	Share in total DLO volume, %	
2021	2020		2021	2020
1	1	REVLIMIDE	6.9	9.4
2	2	ELIZARIA	3.9	3.3
3	50	OCREVUS	3.5	0.0
4	5	ADVATE	3.4	2.7
5	12	OCTOFACTOR	2.8	1.7
6	3	ELAPRASE	2.8	3.2
7	7	DARZALEX	2.6	2.3
8	10	TYSABRI	2.4	1.9
9	4	ACELLBIA	2.3	2.7
10	49	HEMLIBRA	1.9	0.0
Total			32.6	27.2

Just as the corresponding brand, LENALIDOMIDE (-17%) continued to hold rank number one in the top 10 INN and group names ranking (Table 3). FACTOR VIII (+14%) held its previous rank three, whereas the other INNs of the top ten ranking changed their ranks, moreover, five of them rose in the ranks. ECULIZUMAB (+32%) moved up to rank two from four and OCTOCOG ALFA (+41%) from rank seven to six. Three newcomers, OCRELIZUMAB (2.5-fold growth in purchases), MOROCTOCOG ALFA (+90%) and DARATUMUMAB (+26%) moved up to ranks four, eight and ten, respectively. At the same time, INTERFERON BETA-1A (+13%) moved down one rank, and RITUXIMAB (-3%) and IDURSULFASE (-4%), which purchases were reduced, moved down to ranks five and nine. The cumulative share of the top-ten increased by 3 p.p. and achieved 36.3%.

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, %	
2021	2020		2021	2020
1	1	LENALIDOMIDE	6.9	9.4
2	4	ECULIZUMAB	3.9	3.3
3	3	FACTOR VIII	3.7	3.6
4	50	OCRELIZUMAB	3.5	0.0
5	2	RITUXIMAB	3.4	3.9
6	7	OCTOCOG ALFA	3.4	2.7
7	6	INTERFERON BETA-1A	3.2	3.1
8	14	MOROCTOCOG ALFA	2.8	1.7
9	5	IDURSULFASE	2.8	3.2
10	12	DARATUMUMAB	2.6	2.3
Total			36.3	33.2

The top ten ATC groups showed high stability: it didn't change in composition and most of its INNs held their own in the ranking (Table 4). L04 Immunosuppressants (+20%), B02 Antihemorrhagics (+29%), L01 Antineoplastic agents (+13%), A10 Drugs used in diabetes (+3%), L03 Immunostimulants (+2%) and A16 Other alimentary tract and metabolism products (+7%) held their previous six ranks, and H01 Hypothalamic-pituitary hormones and their analogues (-6%) rounded out the top ten ranking. The only shift affected ranks from seven through nine. B01 Antithrombotic agents (+46%) showed the highest growth rates among the top ten ATC groups and moved up from rank nine to seven, displacing R03 Drugs for obstructive airway diseases (-9%) and B03 Anti-anaemic preparations (-20%) one rank down. The total share of the top ten ranking expanded from 85.6% to 87.6%.

Figure 4. The top ten ATC groups in DLO segment

Rank in the top ten		ATC code	ATC group	Share in total DLO volume, %	
2021	2020			2021	2020
1	1	L04	IMMUNOSUPPRESSANTS	26.2	24.3
2	2	B02	ANTIHEMORRHAGICS	18.9	16.4
3	3	L01	ANTINEOPLASTIC AGENTS	11.2	11.1
4	4	A10	DRUGS USED IN DIABETES	9.2	10.0
5	5	L03	IMMUNOSTIMULANTS	7.1	7.8
6	6	A16	OTHER ALIMENTARY TRACT AND METABOLISM PRODUCTS	6.7	7.1
7	9	B01	ANTITHROMBOTIC AGENTS	2.8	2.1
8	7	R03	DRUGS FOR OBSTRUCTIVE AIRWAY DISEASES	2.3	2.9
9	8	B03	ANTIANEMIC PREPARATIONS	1.6	2.2
10	10	H01	PITUITARY, HYPOTHALAMIC HORMONES AND ANALOGUES	1.5	1.8
Total				87.6	85.6

Data on supplies to the top ten regions of Russia under State Reimbursement Program (DLO) are shown in Table 5. Moscow held its previous rank number one, Moscow region moved up to rank two (+27%), displacing St. Petersburg (-5%) down to rank three. The remarkable thing is that the latter is the only one out of top ten leaders, which showed negative growth rates. The highest growth rates were observed in Bashkortostan (+35%), which allowed it to break into the top ten ranking. Another newcomer, Rostov region, rounded out the top ten ranking. The total share of the top ten regions increased by 1 p.p. and accounted for 42.0%.

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

Rank in the top ten		Region	Share in total DLO volume, %	
2021	2020		2021	2020
1	1	Moscow	12.2	12.4
2	3	Moscow Region	5.1	4.5
3	2	Saint Petersburg	4.5	5.3
4	4	Sverdlovsk Region	3.9	3.4
5	5	Krasnodar Krai	3.3	3.3
6	6	Tatarstan Republic	3.0	2.8
7	7	Novosibirsk Region	2.7	2.6
8	11	Bashkortostan Republic	2.7	2.2
9	10	Chelyabinsk Region	2.5	2.3
10	12	Rostov Region	2.3	2.2
Total			42.0	41.0

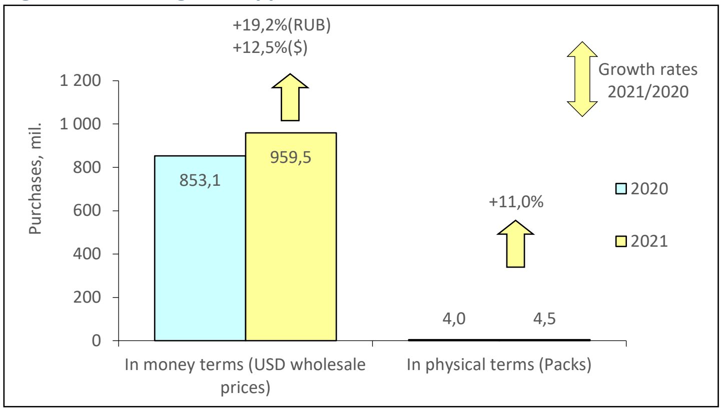
Conclusion. On the basis of the results for 2021, the DLO segment brought in RUB 114.447 bil. (USD 1.546 bil.) in contractual prices, which is by 12% in terms of roubles and by 6% in terms of dollars more than in 2020. In pack terms, the supplies under the program decreased by 6% to 64.934 mil. packs. The average cost of FPP included in the DLO Programme increased as compared to the previous year (USD 23.81 vs USD 20.97).

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

2021 COST DEMANDING NOSOLOGIES (VZN) PROGRAM

According to IQVIA, the volume of supplies under the VZN program in contract prices amounted to RUB 71.1 bil. (USD 959.5 mil.) (Fig. 1). The purchases saw a 19.2% increase in terms of national currency and a 12.5% increase in terms of dollars as compared to the previous year. In natural terms, the supplies increased by 11% to 4.5 mil. packs. In 2021, the VZN procurement nomenclature was updated to include four INNs: Taliglucerase for the treatment of type I Gaucher disease, Emicizumab and Simoctocog alfa for the treatment of haemophilia A (a hereditary clotting disorder due to factor VIII deficiency), as well as Ocrelizumab that is indicated for relapsing forms of multiple sclerosis or primary progressive multiple sclerosis.

Figure 1. VZN Program supplies trend in 2021 vs 2020



The groups of drugs to treat multiple sclerosis (+42%), drugs to treat systemic-onset juvenile arthritis (+36%), and drugs used in haemolytic-uremic syndrome (+33%) showed the largest increase in purchases in terms of roubles as compared to 2020. The group of oncohematological drugs (-5%) showed a negative increase in purchases. In 2021, the group of drugs to treat haemophilia continued as the leader in the purchases rating, the drugs to treat multiple sclerosis and oncohematological drugs moved to ranks two and three respectively.

Figure 1. Supplies pattern under the VZN Program

Nosologies	INN	Share in total VZN supplies (RUB), %	
		2021	2020
Haemophilia		**30.1**	**27.8**
	FACTOR VIII	6.0	6.2
	OCTOCOG ALFA	5.5	4.6
	MOROCTOCOG ALFA	4.6	2.9
	FACTOR VIII*FACTOR VON WILLEBRAND	3.5	3.3
	EMICIZUMAB	3.1	0.0
	FACTOR VIII INHIBITOR BYPASSING FRACTION	2.5	4.5
	EPTACOG ALFA (ACTIVATED)	2.4	4.1
	FACTOR IX	1.6	1.8
	NONACOG ALFA	0.5	0.4
	SIMOCTOCOG ALFA	0.4	0.0
Sclerosis Multiplex		**23.4**	**19.7**
	OCRELIZUMAB	5.7	0.0
	INTERFERON BETA-1A	5.1	5.4
	NATALIZUMAB	3.8	3.3
	INTERFERON BETA-1B	2.7	4.1
	PEGINTERFERON BETA-1A	2.3	2.0
	TERIFLUNOMIDE	1.9	2.4
	GLATIRAMER ACETATE	1.3	1.6
	ALEMTUZUMAB	0.8	0.9
Oncohematology		**22.0**	**27.6**
	LENALIDOMIDE	11.2	16.1
	RITUXIMAB	5.3	6.1
	DARATUMUMAB	4.2	4.0
	BORTEZOMIB	0.8	0.8
	IMATINIB	0.3	0.4
	FLUDARABINE	0.2	0.2
Mucopolysaccharidosis type I, II and VI		**8.3**	**9.4**
	IDURSULFASE	4.5	5.5
	GALSULFASE	2.2	2.7
	LARONIDASE	1.0	1.1
	IDURSULFASE BETA	0.7	0.1
Haemolytic-uremic syndrome		**6.3**	**5.6**
	ECULIZUMAB	6.3	5.6
Transplantation		**3.3**	**3.4**
	TACROLIMUS	2.0	2.2
	MYCOPHENOLIC ACID	0.7	0.6
	EVEROLIMUS	0.3	0.3
	CICLOSPORIN	0.2	0.2
	MYCOPHENOLATE MOFETIL	0.1	0.1
Systemic-onset juvenile arthritis.		**2.5**	**2.2**
	CANAKINUMAB	2.0	1.7
	TOCILIZUMAB	0.5	0.5
	ETANERCEPT	0.0	0.0
	ADALIMUMAB	0.0	0.0
Mucoviscidosis		**2.0**	**2.0**
	DORNASE ALFA	2.0	2.0
Gaucher disease		**1.9**	**1.9**
	IMIGLUCERASE	1.2	1.4
	VELAGLUCERASE ALFA	0.7	0.5
	TALIGLUCERASE ALFA	0.0	0.0
Pituitary dwarfism		**0.2**	**0.3**
	SOMATROPIN	0.2	0.3

Generium held its previous rank number one in the top ten manufacturers ranking just as in the previous year (Table 3). Purchases of drugs manufactured by Generium increased by almost 18%. The growth was provided primarily by 90% increase in purchases of Octofactor, a recombinant blood factor VIII, and by 33% increase in purchases of Elizaria for the treatment of atypical haemolytic uremic syndrome. In 2021, these drugs accounted for 15% and 30% shares in the sales pattern of the company. Takeda moved up to rank two in the top drug manufacturers ranking. Advate, the recombinant coagulation factor VIII, (+28.6%) made the most significant positive contribution to the growth rates, which accounted for 34% of all sales of the company and moved up to rank 4 in the top ten brands ranking (Table 2). In 2021, Elaprase to treat mucopolysaccharidosis type II with slight changes in purchases moved down from rank 3 to 6 in the ranking. Celgene, which had previously been a leader of the VZN Program for many years, has been holding rank three since 2019 (Table 3). Revlimid continued to be at the head of the brands ranking with a large margin from other drugs, though its share reduced from 16% to 11% (Table 2).

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

Rank in the top ten		Brand	Share in total VZN supplies, %	
2021	2020		2021	2020
1	1	REVLIMIDE	11.2	16.1
2	2	ELIZARIA	6.3	5.6
3		OCREVUS	5.7	
4	4	ADVATE	5.5	4.6%
5	11	OCTOFACTOR	4.6	2.9%
6	3	ELAPRASE	4.5	5.5%
7	7	DARZALEX	4.2	4.0%
8	9	TYSABRI	3.8	3.3%
9	6	ACELLBIA	3.5	4.1%
10		HEMLIBRA	3.1	
Total			52.3	54.8

J&J held its previous rank four in the top ten ranking though its sales increased b 31%. Darzalex (Daratumumab) indicated for multiple myeloma was added to the VZN nomenclature in the previous year. In 2021, its purchases increased b 26% and accounted for 41% in the sales pattern of the company. Darzalex remained in rank seven in the top ten brands ranking (Table 2). J&J's multiple sclerosis drugs, Tysabri and a new drug, Plegridy (Peginterferon beta-1a), accounted for 37% and 22% of the company's total sales. Tysabri moved up to rank 8 from 9 in the top ten brands ranking. In 2021, Roche moved up to rank five due to two of its drugs, which were included for the first time in the VZN nomenclature. These were Ocrevus (Ocrelizumab) for the treatment of multiple sclerosis, and Hemlibra (Emicizumab) for the treatment of haemophilia A. The drugs accounted for 60% and 33%, respectively, in the company's sales pattern and moved up to ranks three and ten in the trade names ranking. Biocad continued its downward run, coming at rank six. Acellbia, a biosimilar to Roche's Mabthera, moved down from rank six to nine in the ranking (Table 2). It accounted for 42% of all sales of Biocad, the remaining sales were made up by purchases of four drugs to treat multiple sclerosis.

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

Rank in the top ten		Manufacturer*	Share in total VZN supplies, %	
2021	2020		2021	2020
1	1	GENERIUM ZAO RF	18.7	18.9
2	2	**TAKEDA**	16.0	17.3
3	3	CELGENE	11.2	16.1
4	4	**JOHNSON & JOHNSON**	10.3	9.4
5	15	**ROCHE**	9.5	0.9
6	5	BIOCAD RF	8.5	9.1
7	6	OCTAPHARMA	4.8	5.4
8	8	**CSL BEHRING GMBH**	2.3	2.8
9	11	**NOVARTIS**	2.3	2.1
10	9	**BIOMARIN IRELAND**	2.2	2.7
Total			85.8	86.9

*AIPM members are in bold

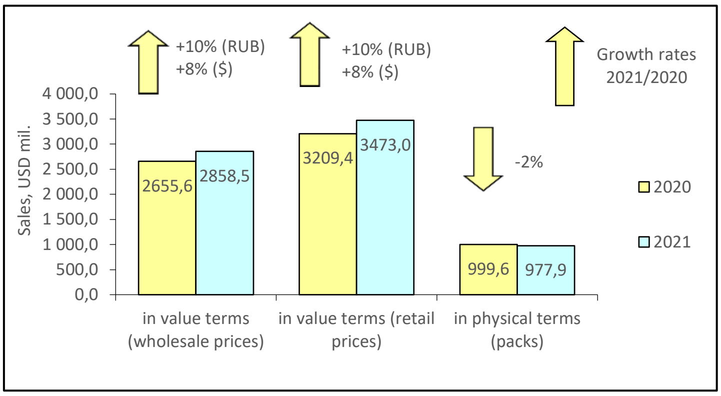
Conclusion: In total, purchases of Russian-manufactured drugs in physical terms increased by 20.3% in the VZN segment, while those of foreign manufacture grew by 3.9%. In case of Russian drugs, the growth rates of purchases in value terms were also higher (+24.1% and + +17.0%, respectively). The share of Russian drugs in the VZN segment pattern markedly increased in terms of packs from 44 to 47%. It reached 32% in terms of roubles, having increased by 1 p.p. per year over the past three years. The full production cycle products (including APS) account for 86% in terms of packs and 95% in terms of roubles in the total Russian product sales.

CFD PHARMACY MARKET (WITHOUT MOSCOW): 2021 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 2021, the average wage in the CFD (with Moscow) was RUB 65,188 (USD 885.11), which was 28% higher than the average wage in Russia (RUB 51083).

According to the results of the Retail Audit of Finished Pharma Products (FPP) in Russian Federation™ IQVIA, at the end of 2021, the volume of drugs in physical terms in the CFD (excl. of Moscow) showed negative growth rates (-2%) and totalled to 977.921. In money terms, the market increased by 10% in terms of roubles and 8% in terms of dollars. At the same time, the market volume reached RUB 210.178 bil. (USD 2.859 bil.) at wholesale prices (Fig.1). The region market share accounted for 20.9% of the Russian pharmacy retail sales. The average cost of a pack increased as compared to 2020 and was equal to USD 3.55 against USD 3.21 at retail prices. At the end of 2021, the average amount spent by the residents of the region for FPPs in the pharmacies amounted to USD 130.58.

Figure 1. CFD (exc. of Moscow) pharmacy market in 2020 – 2021



BAYER (+20%) and OTCPHARM (+0.2%) retained the largest sales volumes in the market of the Central Federal District (excluding Moscow) following the results of 2021 (Table 1). And if the former strengthened its leadership due to high dynamics, the latter showed its almost zero value, which resulted in a decrease of the market share. Apart from the leader, another three companies developed their markets by outstripping rates. Due to this, STADA (+12%), GLAXOSMITHKLINE (+13%) and ABBOTT (+14%) moved up to ranks three, eight, and ten, respectively. On top of that, the latter became the only newcomer of the top ten ranking. The slow-moving TEVA (+8%) also was able to move up by two points. At the same time, SANOFI (-1%), SERVIER (+3%), KRKA (-1%) and BERLIN-CHEMIE/MENARINI (+7%) lost one rank each, moving down to ranks four, six, seven and nine. The cumulative share of the top ten reduced by 0.7 p.p. and accounted for 34.7%.

Figure 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
2021	2020		2021	2020
1	1	**BAYER**	5.1	4.6
2	2	OTCPHARM	3.9	4.3
3	4	**STADA**	3.8	3.8
4	3	**SANOFI**	3.7	4.1
5	7	**TEVA**	3.2	3.3
6	5	**SERVIER**	3.2	3.4
7	6	**KRKA**	3.1	3.4
8	9	**GLAXOSMITHKLINE**	2.9	2.8
9	8	**BERLIN-CHEMIE/MENARINI**	2.9	2.9
10	11	**ABBOTT**	2.8	2.6
Total			34.7	35.4

*AIPM members are in bold

Due to 51% growth in sales, INN XARELTO held and reinforced its previous rank number one in the top ten brand names ranking (Table 2). Some shifts took place in the lower part of the top ten manufacturers ranking, as a result of which only three brands rose in the ranks. Thus, ELIQUIS (2.1-fold growth in sales) and DETRALEX (+18%) moved up to ranks two and five, and the only newcomer CARDIOMAGNYL (+18%) moved up to rank nine. In addition to the above-mentioned brands, ARBIDOL and NUROFEN (+19% each) also showed outstripping rates, holding their previous ranks three and eight. As before, MEXIDOL (+10%) held its previous rank six. INGAVIRIN, which reduced its sales by 19%, as well as CONCOR (+2%) and PENTALGIN (+3%), which showed low growth rates, moved down to ranks four, seven and ten, respectively. The total share of the top ten brands increased by 1.1 p.p. and accounted for 9.5%.

Figure 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
2021	2020		2021	2020
1	1	XARELTO	1.8	1.3
2	4	ELIQUIS	1.5	0.8
3	3	ARBIDOL	1.2	1.1
4	2	INGAVIRIN	0.8	1.1
5	7	DETRALEX	0.8	0.7
6	6	MEXIDOL	0.8	0.8
7	5	CONCOR	0.7	0.8
8	8	NUROFEN	0.7	0.7
9	11	CARDIOMAGNYL	0.7	0.6
10	9	PENTALGIN	0.6	0.7
Total			9.5	8.4

The top INN and generic names ranking leader changed (Table 3). RIVAROXABAN (+51%) moved up to rank one from two, displacing the former leader XYLOMETAZOLINE (+10%) one rank down. Another three brand names improved their positions. The newcomer APIXABAN (2.1-fold increase in sales), which broke into the top ten ranking for the first time, moved up to rank three, and DIOSMIN*HESPERIDIN (+21%) and IBUPROFEN (+17%) moved one rank up, coming in at numbers five and seven. At the same time, the latter displaced NIMESULIDE (+12%) down one rank. BISOPROLOL (+3%), which showed low growth rates, moved down from rank three to six. UMIFENOVIR (+21%), PANCREATIN (+11%) and ETHYLMETHYLHYDROXYPYRIDINE (+12%) held their own in the ranking. The total share of the top 10 increased from 10.8% to 12.3%.

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

Rank in the top ten		INNs/Grouping Names	Share in total pharmacy sales, %	
2021	2020		2021	2020
1	2	RIVAROXABAN	1.8	1.3
2	1	XYLOMETAZOLINE	1.6	1.6
3	12	APIXABAN	1.5	0.8
4	4	UMIFENOVIR	1.2	1.1
5	6	DIOSMIN*HESPERIDIN	1.2	1.1
6	3	BISOPROLOL	1.1	1.2
7	8	IBUPROFEN	1.1	1.0
8	7	NIMESULIDE	1.1	1.0
9	9	PANCREATIN	0.9	0.9
10	10	ETHYLMETHYLHYDROXYPYRIDINE	0.9	0.8
Total			12.3	10.8

B01 Antithrombotic agents (+37%), which moved up to rank number one from four, showed the largest sales and highest growth ranks in the regional market among the leading ATC groups (Table 4). The top three ATC groups in the last year C09 Agents acting on the renin-angiotensin system (+1%), M01 Anti-inflammatory and antirheumatic products (+12%) and J05 Antivirals for systemic use (-5%) moved down to ranks two through four respectively. Two more shifts took place in the lower part of the top ten ranking. R01 Nasal preparations (+13%) and C05 Vasoprotectives (+16%) moved rank up one, coming in at numbers five and nine, displacing J01 Antibacterials for systemic use (-13%) and R05 Cough and cold preparations (+14%) one rank down. N02 Analgesics (+4%) and G03 Sex hormones (+10%) held their previous ranks seven and eight. In total, the top ten ATC groups accumulated 39.1% of the regional market, which was 0.5 p.p. lower than the year-earlier period indicator (39.6%).

Figure 4. The top ten ATC Groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
2021	2020			2021	2020
1	4	B01	ANTITHROMBOTIC AGENTS	5.5	4.4
2	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.5	5.9
3	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.0	4.9
4	3	J05	ANTIVIRALS FOR SYSTEMIC USE	4.0	4.6
5	6	R01	NASAL PREPARATIONS	3.6	3.5
6	5	J01	ANTIBACTERIALS FOR SYST USE	3.3	4.1
7	7	N02	ANALGESICS	3.2	3.4
8	8	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.1	3.1
9	10	C05	VASOPROTECTIVES	3.0	2.8
10	9	R05	COUGH AND COLD PREPARATIONS	2.9	2.8
Total				39.1	39.6

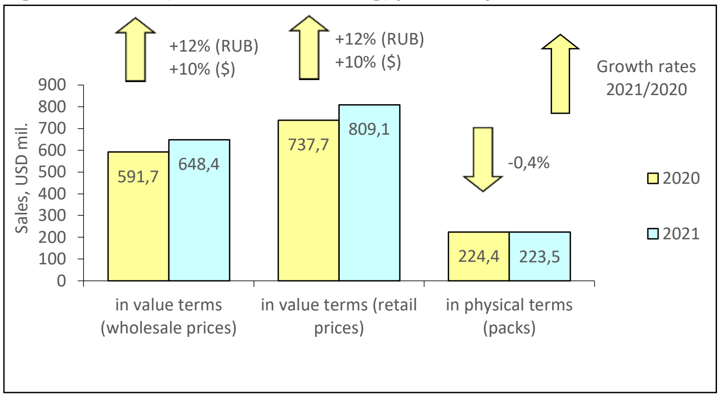
Conclusion. In 2021, the retail pharmacy market of CFD (exc. of Moscow) brought in RUB 255.360 bil. (USD 3.473 bil.), which was by 10% in terms of roubles and 8% in terms of dollars more than in 2020. In pack terms, the market also showed negative growth rates (-2%) and achieved 977.921 mil. packs. In 2021, the average cost of an FPP pack in the regional pharmacies was USD 3.55, which was higher than the last year figure (USD 3.21), and less than the national average (USD 3.72). However, the average medicine expenses of the CFD residents were higher than the national average expenses in Russia (USD 130.58 vs. USD 113.94).

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

According to Federal State Statistics Service, as of January 1, 2021, estimated population of the North-Western Federal District (NWFD) (exclusive 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, based on the results for 2021 the average wage in the NWFD (without St. Petersburg) was RUB 56827 (USD 771.58), which was 11.2% higher than the average wage in Russia (RUB 51083).

According to the results of the Retail Audit of Finished Pharmaceutical Products (FPP) in Russian Federation™ IQVIA, at year-end 2021 the sales of drugs in physical terms in the NWFD (without St. Petersburg) saw almost zero growth rates (-0.4%) and amounted to 223.506 mil. packs. In money terms, the market increased by 12% in terms of roubles and 10% in terms of dollars. At the same time, the volume of the market achieved RUB 47.684 bil. (USD 648.435 mil.) at wholesale prices (Fig. 1). The share of the region accounted for 4.9% of the Russian retail pharmacy sales. The average cost of an OTC pack in the pharmacies increased: USD 3.62 vs. USD 3.29 at retail prices in the year-earlier period. The average amount spent by the residents of the region for FPPs in the pharmacies for twelve months amounted to USD 94.55.

Figure 1. NWFD (exc. of St. Petersburg) pharmacy market in 2020 – 2021



Following the results of 2021, BAYER, which showed a 20% increase in sales, took the lead in the top ten manufacturers ranking on the pharmacy market of the NW Federal District (NWFD) (excl. St. Petersburg) (Table 1). The market of GLAXOSMITHKLINE (+24%), which broke into the ranks of the top ten ranking for the first time, developed by even more high growth rates. The STADA sales (+15%) grew more than the market average, which allowed it to move up two points, coming in at number four. SERVIER (+7%) moved up from rank four to three. In contrast, OTCPHARM (-3%) and KRKA (-4%), as well as SANDOZ (+3%), which reduced their sales moved down to the lower ranks two, six and the last one. SANOFI (+2%), TEVA (+12%) and GEDEON RICHTER (+5%) managed to hold their own in the ranking. The cumulative share of the top 10 manufacturers reduced from 37.9% to 36.5%.

Figure 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
2021	2020		2021	2020
1	2	**BAYER**	5.2	4.8
2	1	OTCPHARM	4.4	5.0
3	4	**SERVIER**	3.8	4.0
4	6	**STADA**	3.8	3.7
5	5	**SANOFI**	3.6	4.0
6	3	**KRKA**	3.4	4.0
7	7	**TEVA**	3.4	3.4
8	8	GEDEON RICHTER	3.0	3.2
9	11	**GLAXOSMITHKLINE**	2.9	2.7
10	9	**SANDOZ**	2.9	3.1
Total			36.5	37.9

*AIPM members are in bold

The top ten INN and generic names ranking did not change its leader: ARBIDOL (+31%) held and reinforced its previous rank number one (Table 2). Some shifts took place in the lower part of the top ten manufacturers ranking, as a result of which six INNs rose in the ranks. The brands XARELTO (+57%), ELIQUIS (+62%), NUROFEN (+8%) and CARDIOMAGNYL (+19%) moved one rank up, coming in at numbers two through five and eight. DETRALEX (+27%) moved two ranks up, and the newcomer MEXIDOL (+15%) broke into the top ten ranking, coming in at number ten. At the same time, INGAVIRIN (-19%) and LORISTA (-9%), which reduced their sales, moved down to ranks five and nine, and CONCOR (+2%), which showed low growth rates, moved one rank down. The total share of the top 10 brands increased from 8.7% to 9.4%.

Figure 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
2021	2020		2021	2020
1	1	ARBIDOL	1.6	1.4
2	3	XARELTO	1.5	1.1
3	4	ELIQUIS	1.3	0.9
4	5	NUROFEN	0.8	0.9
5	2	INGAVIRIN	0.8	1.1
6	8	DETRALEX	0.8	0.7
7	6	CONCOR	0.7	0.8
8	9	CARDIOMAGNYL	0.6	0.6
9	7	LORISTA	0.6	0.8
10	14	MEXIDOL	0.5	0.5
Total			9.4	8.7

Just as the corresponding brand, UMIFENOVIR (+31%) held and reinforced the leadership in the top 10 INN and group names ranking (Table 3). RIVAROXABAN (+57%) moved up to rank two from six, displacing XYLOMETAZOLINE (+15%) to rank three. The newcomer APIXABAN (+62%) broke into the top ten ranking, coming in at rank four, whereas the second newcomer ROSUVASTATIN (+21%) rounded it out. The composition DIOSMIN*HESPERIDIN (+24%) and INN ATORVASTATIN (+10%) moved one rank up, coming in at numbers six and nine, respectively. In contrast, IBUPROFEN (+10%) and BISOPROLOL (+2%) moved down to the lower ranks. NIMESULIDE (+13%) as before held its previous rank eight. In total, ten INNs and group names accounted for 12.4% of the regional sales against 11.2% in the year-earlier period.

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

Rank in the top ten		INNs/Grouping Names	Share in total pharmacy sales, %	
2021	2020		2021	2020
1	1	UMIFENOVIR	1.7	1.4
2	6	RIVAROXABAN	1.5	1.1
3	2	XYLOMETAZOLINE	1.4	1.4
4	12	APIXABAN	1.3	0.9
5	3	IBUPROFEN	1.2	1.3
6	7	DIOSMIN*HESPERIDIN	1.2	1.1
7	4	BISOPROLOL	1.2	1.3
8	8	NIMESULIDE	1.0	1.0
9	10	ATORVASTATIN	0.9	1.0
10	14	ROSUVASTATIN	0.9	0.8
Total			12.4	11.2

Four of the top 10 ATC groups in the regional market held their own in the ranking (Table 4). Among them were the leaders of the top ten C09 Agents acting on the rennin-angiotensin system (+0.3%) and M01 Anti-inflammatory and antirheumatic products (+11%). G03 Sex hormones (+20%) and C05 Vasoprotectives (+14%) held their previous ranks five and ten. B01 Antithrombotic agents, which showed 37% growth in sales, moved up from rank four to three, and the groups R01 Nasal preparations (+19%) and R05 Cough and cold preparations (+18%) moved up to ranks six and seven respectively. In contrast, the markets of groups J01 Antibacterials for systemic use (-3%), N02 Analgesics (-1%) and J01 Antibacterials for systemic use (-3%) were characterized by negative growth rates and decline in ratings. The top ten ATC groups accounted for 40.2% of regional pharmacy sales, and in the year-earlier period – 40.8%.

Figure 4. The top ten ATC Groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
2021	2020			2021	2020
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	6.0	6.7
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.2	5.3
3	4	B01	ANTITHROMBOTIC AGENTS	4.8	3.9
4	3	J05	ANTIVIRALS FOR SYSTEMIC USE	4.3	5.0
5	5	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.1	3.9
6	8	R01	NASAL PREPARATIONS	3.5	3.3
7	9	R05	COUGH AND COLD PREPARATIONS	3.3	3.1
8	7	N02	ANALGESICS	3.0	3.4
9	6	J01	ANTIBACTERIALS FOR SYST USE	3.0	3.5
10	10	C05	VASOPROTECTIVES	2.9	2.9
Total				40.2	40.8

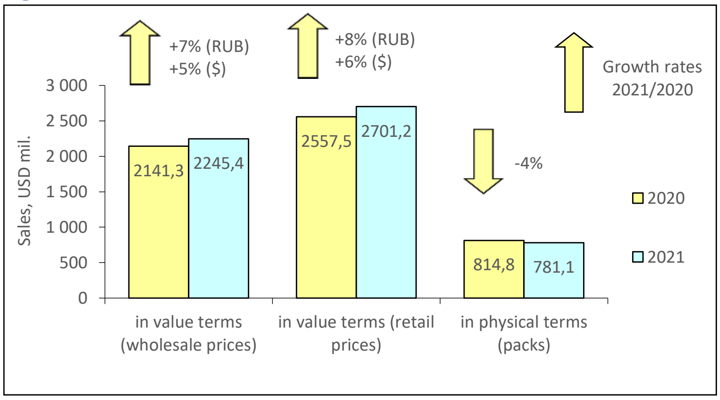
Conclusion. In 2021, the pharmacy market of the NWFD (exc. of St Petersburg) brought in RUB 59.500 bil. (USD 809.101 mil.), which was by 12% in terms of roubles and 10% in terms of dollars more than in 2020. In natural terms, the market demonstrated virtually zero growth rates (-0.4%) and achieved 223.506 mil. packs. According to the results for 2021, the average cost of an FPP pack in the regional pharmacies was USD 3.62, which was more than the 2020 figure (USE 3.29), but lower than the national average across the country (USD 3.72). The FPP expenses of the district residents were lower than the national average expenses throughout Russia (USD 94.55 vs USD 113. 94).

VFD PHARMACY MARKET: 2021 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 2021 the average wage in the VFD was RUB 36811 (USD 499.81), which was 28% lower than the national average wage in Russia (RUB 51083).

According to the results of the Retail Audit of Finished Pharmaceutical Products (FPP) in Russian Federation™ IQVIA, in 2021 the pharmacy market of VFD in pack terms reduced by 4% to 781.060 mil. packs as compared to the last year (Fig. 1) The sales in terms of wholesale prices increased by 7% in terms of roubles and 5% in terms of dollars and reached RUB 165.043 bil. (USD 2.245 bil.), A region's share in the total pharmacy sales in Russia accounted for 16.2%. Based on the results for 2021, the average cost of FPP in the VFD pharmacies increased compared with the year-earlier period (USD 3.14) and was equal to USD 3.46. The average per capita expenses for purchase of drugs in the pharmacies were estimated at USD 92.92.

Figure 1. VFD 2021 market in 2020– 2021



Following the results of 2021, the top ten drug manufacturers ranking on the retail Volga Federal District market didn't change in composition (Table 1). However, half of the top 10 manufacturers held their own in the ranking. OTCPHARM (+9%) and BAYER (+14%) headed the top ten ranking, and KRKA (-1%), SERVIER (+4%) and BERLIN-CHEMIE/MENARINI (+5%) held their previous ranks five, eight and ten. Among the remaining manufacturers, two rose in the ranks: STADA (+11%) and ABBOTT (+16%) moved up to ranks three and six, respectively. In contrast, SANOFI (-3%) and SANDOZ (-6%), which reduced its sales, as well as TEVA (+2%), which showed low growth rates, moved down to the lower positions. The total share of the top 10 brands reduced from 32.3% to 32.0%.

Figure 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
2021	2020		2021	2020
1	1	OTCPHARM	4.7	4.6
2	2	**BAYER**	4.2	3.9
3	4	**STADA**	3.5	3.3
4	3	**SANOFI**	3.3	3.7
5	5	**KRKA**	3.0	3.1
6	9	**ABBOTT**	2.9	2.7
7	6	**TEVA**	2.9	3.0
8	8	**SERVIER**	2.7	2.8
9	7	**SANDOZ**	2.5	2.8
10	10	**BERLIN-CHEMIE/MENARINI**	2.4	2.4
Total			32.0	32.3

*AIPM members are in bold

Most of the top-10 brands showed outstripping growth rates (Table 2). Among them were ARBIDOL (+37%), which kept its leadership, as well as XARELTO (+40%), MEXIDOL (+12%) and DETRALEX (+7%), which held ranks three, four and ten. ELIQUIS (2-fold growth in sales) and the newcomer HEPTRAL (+43%) managed to move up to the higher ranks, coming in at numbers two and five. Despite this, two more outperforming brands, PENTALGIN (+11%) and NUROFEN (+9%), moved one rank down, coming in at numbers seven and nine, respectively. ACTOVEGIN (+6%) also lost one rating point, while INGAVIRIN, which reduced sales by 42%, moved down from rank two to six. The total share of the top ten brands ranking increased by 1 p.p. and achieved 8.6%.

Figure 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
2021	2020		2021	2020
1	1	ARBIDOL	1.5	1.2
2	5	ELIQUIS	1.3	0.7
3	3	XARELTO	1.3	1.0
4	4	MEXIDOL	0.7	0.7
5	12	HEPTRAL	0.7	0.5
6	2	INGAVIRIN	0.6	1.2
7	6	PENTALGIN	0.6	0.6
8	7	ACTOVEGIN	0.6	0.6
9	8	NUROFEN	0.6	0.6
10	10	DETRALEX	0.6	0.5
Total			8.6	7.6

Two newcomers broke into the ranks of the top ten INN and generic names ranking. APIXABAN (2-fold growth in sales) and ADEMETIONINE (+39%) moved up to ranks two and ten (Table 3). The markets of the ranking leader UMIFENOVIR (+39%) and RIVAROXABAN (+40%), which moved up to rank three, developed at a fast pace. It should be noted that almost all the remaining INNs of the top ten showed not so high, but outstripping growth rates. At the same time, INN IBUPROFEN and the composition DIOSMIN* HESPERIDIN (+12% each), as well as INN ETHYLMETHYLHYDROXYPYRIDINE (+15%) rose in the ranks. PANCREATIN, which showed a 15% sales growth, held its rank five, while slightly less dynamic XYLOMETAZOLINE (+11%) lost one rank. BISOPROLOL (+4%) moved down three points. In total, the top ten INNs and group names accounted for 11.5% of the regional market vs 9.7% in the year-earlier period.

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

Rank in the top ten		INNs/Grouping Names	Share in total pharmacy sales, %	
2021	2020		2021	2020
1	1	UMIFENOVIR	2.0	1.5
2	13	APIXABAN	1.3	0.7
3	6	RIVAROXABAN	1.3	1.0
4	3	XYLOMETAZOLINE	1.2	1.2
5	5	PANCREATIN	1.1	1.0
6	7	IBUPROFEN	1.0	1.0
7	4	BISOPROLOL	1.0	1.0
8	9	DIOSMIN*HESPERIDIN	1.0	0.9
9	10	ETHYLMETHYLHYDROXYPYRIDINE	0.9	0.8
10	17	ADEMETIONINE	0.9	0.7
Total			11.5	9.7

In contrast to the previous top 10 rankings, the top ten ATC groups changed its leader (Table 4). J05 Antivirals for systemic use, which had been placed at rank number one earlier, reduced their sales by 4% and moved down to rank three. As a result, C09 Agents acting on the rennin-angiotensin system (+3%) moved up to rank number one at the year-end, despite lagging behind the growth rates and decrease in the market's share. In addition to them, M01 Anti-inflammatory and antirheumatic products (+8%), B01 Antithrombotic agents (+29%) and R05 Cough and cold preparations (+10%) moved up to the higher ranks two, four and seven. At the same time, they displaced N02 Analgesics (+7%) one rank down. J01 Antibacterials for systemic use reduced its sales by 17% and moved down to rank five from three. G03 Sex hormones (+6%), R01 Nasal preparations (+11%) and N06 Psychoanaleptics (+8%) held their previous ranks six and the last two. In total, the top ten ATC groups accumulated 39.1% of the regional sales, which was 0.8 p.p. lower than the year-earlier period indicator (39.9%).

Figure 4. The top ten ATC Groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
2021	2020			2021	2020
1	2	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.2	5.5
2	4	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.0	4.9
3	1	J05	ANTIVIRALS FOR SYSTEMIC USE	4.9	5.5
4	5	B01	ANTITHROMBOTIC AGENTS	4.8	3.9
5	3	J01	ANTIBACTERIALS FOR SYST USE	3.8	4.9
6	6	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.3	3.4
7	8	R05	COUGH AND COLD PREPARATIONS	3.1	3.0
8	7	N02	ANALGESICS	3.1	3.1
9	9	R01	NASAL PREPARATIONS	3.0	2.9
10	10	N06	PSYCHOANALEPTICS	2.9	2.9
Total				39.1	39.9

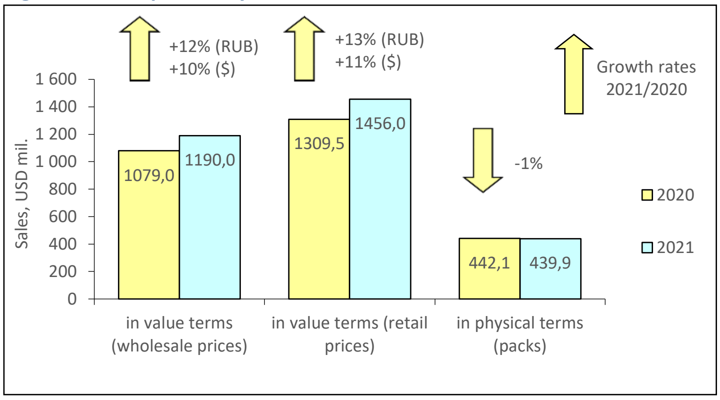
Conclusion. Based on the results for 2021, the pharmacy market in the VFD was estimated at RUB 198.548 bil. (USD 2.701 bil.) at retail prices. At the same time, the market behaviour was positive both in rouble (+8%) and dollar (+6%) terms. In physical terms, the sales reduced by 4% to 781.060 mil. packs. The average cost of an OTC pack based on the results for 2021 was USD 3.46, which was more than in the year-earlier period (USD 3.14), but lower than the national average (USD 3.72). Per capita expenses of the district residents for purchase of medicines in the pharmacies were also lower than the national average figures (USD 92.92 vs. USD 113.94).

SOUTHERN FEDERAL DISTRICT PHARMACY MARKET: 2021 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 2021 the average wage in the Southern FD was RUB 36166 (USD 491.05), which was 29% lower than the national average wage in Russia (RUB 51083).

According to the results of the Retail Audit of Finished Pharmaceutical Products (FPP) in Russian Federation™ IQVIA, at year-end 2021 a 1% reduction in sales of drugs in physical terms was observed in the SoFD, and the volume of sales amounted to 439,882 mil. packs. In money terms, the market showed positive growth rates (+12%) both in rouble terms and in dollar terms (+10%) and reached RUB 87.501 bil. (USD 1.190 mil.) in wholesale prices (Fig. 1). The city market share accounted for 8.7% of the pharmacy sales in Russia. Based on the results for 2021, the average cost of a finished pharma product (FPP) pack was USD 3.31 at retail prices vs. USD 2.96 in a year-earlier period. In 2021, the average amount spent by residents of the SoFD for drugs amounted to USD 88.34.

Figure 1. SoFD pharmacy market in 2020– 2021



The Russian OTCPHARM (+25%) moved up to rank one in the top ten manufacturers ranking in the market of the Southern Federal District based on the results for 2021, displacing BAYER (+6%) to rank two (Table 1). In addition to the leader, STADA (+13%), ABBOTT (+25%), SERVIER (+14%) and BERLIN-CHEMIE/MENARINI (+17%) also demonstrated some progress, moving up to ranks three, six, seven and eight, respectively. At the same time, SANOFI (+3%) and TEVA (+8%) lost one rank each, whereas SANDOZ (+1%) moved down from rank five to nine. GLAXOSMITHKLINE (+11%) held its previous rank ten. In total, the top ten manufacturers accounted for 32.4% of the Russian market, whereas in the year– earlier period they had accounted for 32.5%.

Figure 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
2021	2020		2021	2020
1	2	OTCPHARM	4.4	4.0
2	1	**BAYER**	4.4	4.7
3	4	**STADA**	3.4	3.3
4	3	**SANOFI**	3.3	3.6
5	8	**ABBOTT**	3.2	2.8
6	7	**SERVIER**	3.0	2.9
7	6	**TEVA**	2.8	2.9
8	9	**BERLIN-CHEMIE/MENARINI**	2.8	2.7
9	5	**SANDOZ**	2.7	3.0
10	10	**GLAXOSMITHKLINE**	2.5	2.5
Total			32.4	32.5

*AIPM members are in bold

The leader of the top-10 brands ranking also changed. ARBIDOL (+79%) and ELIQUIS, which sales increased 2 times, moved up to ranks one and two from three and four (Table 2). AREPLIVIR scored a more than two-fold increase in sales volumes (by 2.2 times), which allowed it to rise from the third ten and become the only newcomer of the top ten ranking. HEPTRAL (+61%) also leapt upwards, moving five ranks up to number four. The brands DETRALEX (+42%) and PENTALGIN (+18%) retained and reinforced their previous ranks six and ten. The remaining brands from the top ten ranking fell in the ranks. And what's more, two of them, XARELTO and ACTOVEGIN (+14% each), moved down to the lower ranks despite outstripping growth rates. NUROFEN (+9%) lost two ranks, the last year leader INGAVIRIN (-38%) lost four. The top ten brands accumulated 9.3% of the regional market, whereas in the year-earlier period their share was 7.8%.

Figure 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
2021	2020		2021	2020
1	3	ARBIDOL	1.7	1.0
2	4	ELIQUIS	1.6	0.9
3	2	XARELTO	1.2	1.2
4	9	HEPTRAL	0.8	0.5
5	1	INGAVIRIN	0.7	1.3
6	6	DETRALEX	0.7	0.6
7	5	NUROFEN	0.7	0.7
8	28	AREPLIVIR	0.7	0.3
9	7	ACTOVEGIN	0.6	0.6
10	10	PENTALGIN	0.6	0.5
Total			9.3	7.8

Two newcomers broke into the ranks of the top ten INN and grouping names ranking. ADEMETIONINE (+53%) and BISOPROLOL (+8%) moved up to the two bottom positions of the ranking (Table 3). UMIFENOVIR (+71%) and APIXABAN (2-fold growth in sales) topped the INN ranking, moving up from ranks three and ten. Due to 31% increase in sales, the composition DIOSMIN*HESPERIDIN managed to move three points up. The remaining INNs, although demonstrating outstripping growth rate, either held their own in the ranking or fell in the ranks. The former included INNs RIVAROXABAN (+14%), PANCREATIN (+22%) and NIMESULIDE (+20%) holding ranks four, five and seven, respectively. INNs XYLOMETAZOLINE (+16%) and IBUPROFEN (+13%) lost two ranking points each and moved down to ranks three and eight. The total share of the top-ten increased by 2 p.p. and achieved 12.3%.

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

Rank in the top ten		INNs/Grouping Names	Share in total pharmacy sales, %	
2021	2020		2021	2020
1	3	UMIFENOVIR	1.8	1.2
2	10	APIXABAN	1.6	0.9
3	1	XYLOMETAZOLINE	1.6	1.5
4	4	RIVAROXABAN	1.2	1.2
5	5	PANCREATIN	1.1	1.1
6	9	DIOSMIN*HESPERIDIN	1.1	0.9
7	7	NIMESULIDE	1.0	1.0
8	6	IBUPROFEN	1.0	1.0
9	20	ADEMETIONINE	0.9	0.6
10	11	BISOPROLOL	0.9	0.9
Total			12.3	10.3

J05 Antivirals for systemic use (+1%) continued demonstrating the largest sales on the regional market (Table 4). The most dynamic among the leaders group B01 Antithrombotic agents, which increased its sales by one fourth, moved up to rank two. M01 Anti-inflammatory and antirheumatic products (+16%) holding its previous rank three, R01 Nasal preparations (+14%) moving one rank up, and the newcomers R05 Cough and cold preparations and A07 Antidiarrheals (+23% each) closing the top ten ranking, also showed high-paced growth. At the same time, N02 Analgesics (+8%) moved one rank down, whereas J01 Antibacterials for systemic use, which reduced their sales by 6%, lost two ranking positions. The groups C09 Agents acting on the rennin-angiotensin system (+6%) and G03 Sex hormones (+4%) also managed to hold their previous ranks five and eight. The total share of the top 10 reduced from 40% to 39.2%.

Figure 4. The top ten ATC Groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
2021	2020			2021	2020
1	1	J05	ANTIVIRALS FOR SYSTEMIC USE	5.4	6.0
2	4	B01	ANTITHROMBOTIC AGENTS	5.0	4.5
3	3	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.9	4.8
4	2	J01	ANTIBACTERIALS FOR SYST USE	4.3	5.2
5	5	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	4.2	4.4
6	7	R01	NASAL PREPARATIONS	3.4	3.3
7	6	N02	ANALGESICS	3.2	3.3
8	8	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.0	3.2
9	11	R05	COUGH AND COLD PREPARATIONS	2.9	2.7
10	13	A07	ANTIDIARR.,INTEST. ANTI-INFL./ANTIINFECT. AGENTS	2.8	2.6
Total				39.2	40.0

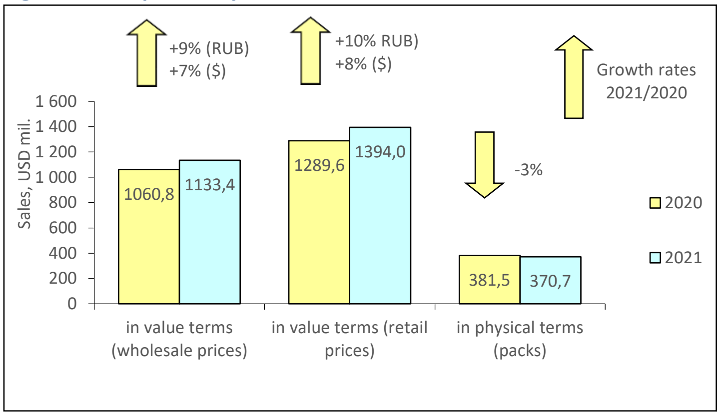
Conclusion. On the basis of the results for 2021, the pharmacy market of the SoFD brought in RUB 107.067 bil. (USD 1.456 bil.) at retail prices. At the same time, the sales increased by 13% in terms of roubles and 11% in terms of dollars. In pack terms, the market also showed minor negative growth rates (-1%), and the sales achieved 439.882 mil. packs. The average cost of an FPP pack in the pharmacies of the region amounted to USD 3.31, which was more than in the previous year (USD 2.96), but lower than the national average (USD 3.72). In 2021, the average expenses of the SoFD residents for FPPs in the pharmacies were also lower than the national average (USD 88.34 vs. USD 113.94).

UFD PHARMACY MARKET: 2021 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 2021 the average wage in the Ural FD FD was RUB 54,155 (USD 735.30), which was 6% higher than the average wage in Russia (RUB 51083).

According to the results for 2021, Retail Audit of Finished Pharma Products (FPP) in Russian Federation™ IQVIA, the sales of OTC drugs in physical terms in the pharmacies of the UFD saw a 3% decrease to 370.741 mil. packs. In money terms, the market showed positive growth rates (+9%) both in rouble terms and in dollar terms (+7%) and reached RUB 83.389 bil. (USD 1.133 mil.) in wholesale prices (Fig. 1). The regional retail sales share accounted for 8.4% of all pharmacy sales in Russia. The average retail cost of an FPP pack in January-December of 2021 was USD 3.76 against USD 3.38 in the year-earlier period. In 2021, the average amount spent by residents of the UFD for drugs amounted to USD 113.06.

Figure 1. UFD pharmacy market in 2020– 2021



The top ten manufacturers composition on the Ural Federal District retail market remained stable in composition following the results for 2021 and most of its manufacturers held their own in the ranking (Table 1). At the same time, OTCPHARM (+10%) and BAYER (+11%) held their leadership, and GEDEON RICHTER and KRKA (+7% each) rounded out the top ten ranking. Another two companies with the same growth rates, TEVA and SERVIER (+7% each) held their previous ranks five and seven. The more dynamic STADA (+11%) and ABBOTT (+14%) moved up to ranks three and six, respectively. At the same time, SANOFI (+1%) and SANDOZ (-5%) moved down to ranks four and eight. The total share of the top 10 drug manufacturers reduced from 33.5% to 33.1%.

Figure 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
2021	2020		2021	2020
1	1	OTCPHARM	4.4	4.4
2	2	**BAYER**	4.4	4.3
3	4	**STADA**	3.9	3.7
4	3	**SANOFI**	3.5	3.8
5	5	**TEVA**	3.2	3.2
6	8	**ABBOTT**	2.9	2.8
7	7	**SERVIER**	2.8	2.9
8	6	**SANDOZ**	2.7	3.1
9	9	GEDEON RICHTER	2.6	2.7
10	10	**KRKA**	2.6	2.7
Total			33.1	33.5

*AIPM members are in bold

One newcomer broke into the ranks of the top ten brand names ranking (Table 2). GRIPPFERON (+52%) moved up to rank nine. The brands ARBIDOL (+46%), XARELTO (+32%), ELIQUIS (+77%), DETRALEX (+18%) and HEPTRAL (+39%), which moved up to ranks one through five respectively, also demonstrated the ranking progress. In contrast, the less dynamic NUROFEN (+4%), PENTALGIN (+6%) and ESSENTIALE (+0,12%), as well as INGAVIRIN (-42%), which also reduced its sales, moved down to the lower ranks six through eight and ten, respectively. The total share of the top ten was 7.5%, in the year-earlier period it was 6.8%.

Figure 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
2021	2020		2021	2020
1	2	ARBIDOL	1.4	1.1
2	3	XARELTO	1.1	0.9
3	6	ELIQUIS	0.9	0.6
4	5	DETRALEX	0.7	0.6
5	9	HEPTRAL	0.7	0.5
6	4	NUROFEN	0.6	0.6
7	1	INGAVIRIN	0.6	1.1
8	7	PENTALGIN	0.5	0.5
9	29	GRIPPFERON	0.5	0.4
10	8	ESSENTIALE	0.5	0.5
Total			7.5	6.8

All INNs of the top ten INN and grouping names ranking showed outstripping growth rates (Table 3). At the same time, six of them with higher growth rates moved up to the higher positions. Among them was the top ten leader UMIFENOVIR (+44%), which displaced XYLOMETAZOLINE (+14%) one rank down. DIOSMIN*HESPERIDIN (+16%), RIVAROXABAN (+32%) and ROSUVASTATIN (+25%) moved up to ranks three, four and nine, and the newcomers APIXABAN (+77%) and ADEMETIONINE (+36%) moved up to ranks seven and ten. INNs IBUPROFEN (+13%), PANCREATIN (+13%) and NIMESULIDE (+11%) continued to hold ranks five, six and eight, respectively. The cumulative share of the top 10 increased from 9.3% to 10.7%.

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

Rank in the top ten		INNs/Grouping Names	Share in total pharmacy sales, %	
2021	2020		2021	2020
1	2	UMIFENOVIR	1.6	1.2
2	1	XYLOMETAZOLINE	1.3	1.3
3	4	DIOSMIN*HESPERIDIN	1.1	1.1
4	7	RIVAROXABAN	1.1	0.9
5	5	IBUPROFEN	1.0	1.0
6	6	PANCREATIN	1.0	1.0
7	19	APIXABAN	0.9	0.6
8	8	NIMESULIDE	0.9	0.8
9	10	ROSUVASTATIN	0.9	0.8
10	16	ADEMETIONINE	0.8	0.6
Total			10.7	9.3

M01 Anti-inflammatory and antirheumatic products (+12%) moved up from rank three to number one in the top ten ATC groups ranking (Table 4). Due to 11% reduction in sales, J05 Antivirals for systemic use (-2%), which had been placed at that position earlier, moved down to rank three. J01 Antibacterials for systemic use (-17%), which lost four ranking points because of that, also demonstrated negative growth rates. N02 Analgesics (+3%) moved one rank down, coming in at number nine. The markets of B01 Antithrombotic agents (+24%), R01 Nasal preparations (+16%), R05 Cough and cold preparations (+12%) and A11 Vitamins (+23%) developed at a fast pace, which allowed them to move up to ranks four, six, seven and ten, respectively. On top of that, the latter group broke into the top 10 ranking for the first time. C09 Agents acting on the rennin-angiotensin system (+6%) and G03 Sex hormones (+9%) held their previous ranks two and five in the ranking. In total, the top ten ATC groups accumulated 37.9% of the regional market, whereas in the year-earlier period they did by 1 p.p. more.

Figure 4. The top ten ATC Groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
2021	2020			2021	2020
1	3	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.0	4.9
2	2	C09	- AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.0	5.1
3	1	J05	- ANTIVIRALS FOR SYSTEMIC USE	4.5	5.5
4	6	B01	- ANTITHROMBOTIC AGENTS	3.9	3.5
5	5	G03	- SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.9	3.9
6	7	R01	NASAL PREPARATIONS	3.4	3.2
7	9	R05	COUGH AND COLD PREPARATIONS	3.1	3.0
8	4	J01	ANTIBACTERIALS FOR SYST USE	3.1	4.0
9	8	N02	ANALGESICS	3.0	3.2
10	11	A11	VITAMINS	2.9	2.6
Total				37.9	38.9

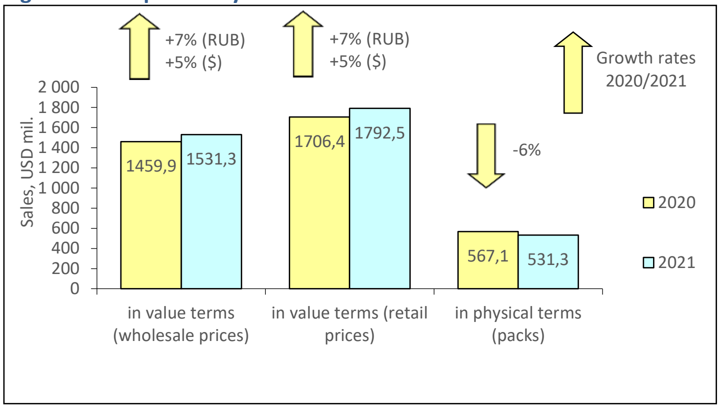
Conclusion. In 2021, the retail pharmacy market of the Ural Federal District brought in RUB 102.547 bil. (USD 1.394 bil.) at retail prices. The regional sales increased by 10% in rouble terms and 8% in dollar terms. In physical terms, the market showed negative growth rates (-3%) and amounted to 37,741 mil. packs. At the end of 2021, the average cost of an FPP pack in the district pharmacies was USD 3.76, which was higher than the last year figure (USD 3.38), and the national average (USD 3.72). The average expenses of the UFD residents for medications in the pharmacies were slightly lower than the national average (USD 113.06 vs. USD 113.94).

SiFD PHARMACY MARKET: 2021 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 2021 the average wage in the Siberian Federal District was RUB 43897 (USD 596.02), which was 14% lower than the national average wage in Russia (RUB 51083).

According to the results of the Retail Audit of FPP drugs in Russian Federation™ IQVIA, in 2021 the SiFD pharmacy market volume in physical terms reduced by 6% to 531.324 mil. packs (Fig. 1) The sales in wholesale prices increased by 7% in terms of roubles and 5% in terms of dollars, reaching RUB 112.660 bil. (USD 1.531 bil.), The district's share accounted for 10.8% of the total pharmacy sales in the Russian pharmacy market pattern. In 2021, the average cost of an FPP pack in the SiFD pharmacies was USD 3.37, whereas in the year-earlier period its cost was USD 3.01. In 2021, per capita expenses of the SFD residents for purchase of medicines in pharmacies amounted to USD 105.41.

Figure 1. SiFD pharmacy market in 2020– 2021



Following the results for 2021, the top 10 drug manufacturers ranking demonstrated high stability in the pharmacy market of Siberian Federal District and seven of its manufacturers held their own in the ranking (Table 1). BAYER (+9%), OTCPHARM (+11%), STADA (+9%), SANOFI (+0,4%) and TEVA (+4%) continued to hold the top ranks, whereas ABBOTT (+15%) and GEDEON RICHTER (+2%) as before rounded out the top ten ranking. Shifts occurred only in the middle part of the ranking. At the same time, SANDOZ, which reduced its sales by 2%, moved two ranks down to number eight, lagging behind SERVIER (+5%) and KRKA (+4%), which moved one rank up each. The total share of the top 10 manufacturers has reduced from 33.8% to 33.6%

Figure 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
2021	2020		2021	2020
1	1	**BAYER**	4.5	4.4
2	2	OTCPHARM	4.3	4.1
3	3	**STADA**	3.9	3.8
4	4	**SANOFI**	3.5	3.7
5	5	**TEVA**	3.1	3.2
6	7	**SERVIER**	3.1	3.2
7	8	**KRKA**	3.0	3.1
8	6	**SANDOZ**	2.9	3.2
9	9	**ABBOTT**	2.8	2.6
10	10	GEDEON RICHTER	2.4	2.5
Total			33.6	33.8

*AIPM members are in bold

The leaders of the top 10 brand names ranking were changed: ARBIDOL (+60%) moved up to rank one from two, ELIQUIS (+63%) moved up to rank two from four. XARELTO (+18%) that held and reinforced its position closed the top three. Another three INNs developed their markets at a fast pace. DETRALEX (+21%), CARDIOMAGNYL (+8%) and HEPTRAL (+50%) moved up to ranks four, six and ten, respectively. On top of that, the latter became the only newcomer of the top 10 ranking. The less dynamic LORISTA (+1%), PENTALGIN (+2%) and NUROFEN (+1%) held their previous ranks five, eight and nine. The brand INGAVIRIN showed a 44% decrease in sales, which resulted in the loss of six ranking points, as the brand moved down from rank one to seven. In total, the top ten manufacturers accumulated 8% of sales vs 7.5% 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, %	
2021	2020		2021	2020
1	2	ARBIDOL	1.5	1.0
2	4	ELIQUIS	1.1	0.7
3	3	XARELTO	1.0	0.9
4	6	DETRALEX	0.7	0.6
5	5	LORISTA	0.7	0.7
6	7	CARDIOMAGNYL	0.6	0.6
7	1	INGAVIRIN	0.6	1.2
8	8	PENTALGIN	0.6	0.6
9	9	NUROFEN	0.6	0.6
10	21	HEPTRAL	0.6	0.4
Total			8.0	7.5

UMIFENOVIR (+61%) moved up to rank number one in the top ten INNs and grouping names rating, displacing XYLOMETAZOLINE (+5%) one rank down (Table 3). The only newcomer of the top ten APIXABAN (+63%) moved up to rank three. The composition DIOSMIN*HESPERIDIN (+19%), as well as INNs RIVAROXABAN (+18%) and PANCREATIN (+8%) managed to improve their positions, moving up to ranks four, six and nine, respectively. In contrast, due to negative growth rates, INN BISOPROLOL (-1%) and LOSARTAN (-3%) scored deterioration of the ranking positions, moving down to ranks seven and ten. INNs IBUPROFEN (+5%) and NIMESULIDE (+9%) placed at ranks five and eight hold their own in the ranking. The cumulative share of the top-ten increased by 1 p.p. and achieved 10.9%

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

Rank in the top ten		INNs/Grouping Names	Share in total pharmacy sales, %	
2021	2020		2021	2020
1	3	UMIFENOVIR	1.7	1.1
2	1	XYLOMETAZOLINE	1.4	1.4
3	12	APIXABAN	1.1	0.7
4	6	DIOSMIN*HESPERIDIN	1.1	1.0
5	5	IBUPROFEN	1.0	1.1
6	7	RIVAROXABAN	1.0	0.9
7	4	BISOPROLOL	1.0	1.1
8	8	NIMESULIDE	0.9	0.9
9	10	PANCREATIN	0.8	0.8
10	9	LOSARTAN	0.8	0.9
Total			10.9	9.9

The leaders of the top ten ATC groups C09 Agents acting on the rennin-angiotensin system (+2%) and M01 Anti-inflammatory and antirheumatic products (+11%) remained unchanged (Table 4). G03 Sex hormones (+11%) and R05 Cough and cold preparations (+10%) also held their previous ranks five and nine. Four from the top ten ATC groups rose in the ranks. B01 Antithrombotic agents (+16%), N02 Analgesics (0%) and R01 Nasal preparations (+12%) moved up to ranks three, six and seven, and the newcomer C05 Vasoprotectives (+12%) broke into the top ten ranking for the first time and closed it. In contrast, J05 Antivirals for systemic use (-11%) and J01 Antibacterials for systemic use (-18%) reduced their sales and moved down to the lower ranks. The share of the top 10 ATC groups decreased from 39.6% to 38.3%.

Figure 4. The top ten ATC Groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
2021	2020			2021	2020
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.2	5.4
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.1	5.0
3	6	B01	ANTITHROMBOTIC AGENTS	4.0	3.7
4	3	J05	ANTIVIRALS FOR SYSTEMIC USE	4.0	4.9
5	5	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.0	3.9
6	7	N02	ANALGESICS	3.4	3.7
7	8	R01	NASAL PREPARATIONS	3.4	3.2
8	4	J01	ANTIBACTERIALS FOR SYST USE	3.2	4.2
9	9	R05	COUGH AND COLD PREPARATIONS	3.1	3.0
10	11	C05	VASOPROTECTIVES	2.8	2.6
Total				38.3	39.6

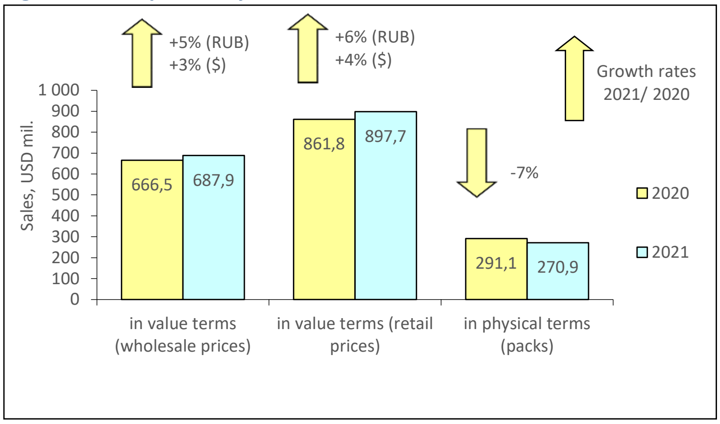
Conclusion. At the year-end 2021, the pharmacy market in the Siberian Federal District was estimated at RUB 131.872 bil. (USD 1.792 bil.) at final consumer prices. At the same time, the market behaviour was positive both in rouble (+7%) and in dollar (+5%) terms. In physical terms, the sales increased by 6% and amounted to 531.324 mil. packs. The average cost of an FPP pack increased as compared to a year earlier (USD 3.37 vs. USD 3.01) but continued to be lower than the national FPP price average in Russia (USD 3.72). Per capita expenses of the district residents for purchase of medicines in the pharmacies were also lower than the national average figures (USD 105.41 vs. USD 113.94).

FEFD PHARMACY MARKET: 2021 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 2021 the average wage in the Far Eastern FD was RUB 59863 (USD 812.80), which was 17% higher than the average wage in Russia (RUB 51083).

According to the results of the Retail Audit of Finished Pharma Products in Russian Federation™ IQVIA, at year-end 2021 the sales of drugs in physical terms in the pharmacies of the FEFD saw a 7% increase to 270.904 mil. packs. In money terms, the market expanded by 5% in terms of roubles, and 3% in terms of dollars. At the same time, the volume of the market amounted to RUB 50.608 bil. (USD (687.920 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 2.96) and was equal to USD 3.31. At the year-end 2021, the average amount spent by the FEFD residents for drugs in the pharmacies amounted to USD 110.50.

Figure 1. FEFD pharmacy market in 2020 – 2021



According to the results for 2021, the top ten manufacturers rating in the retail market of FEFD showed high stability: it did not change in composition and most of its manufacturers held their own in the ranking (Table 1). Among them were the top ten leaders BAYER (+8%), OTCPHARM (+13%), STADA (+5%) and KRKA (+3%), as well as SERVIER (+5%), GEDEON RICHTER (+3%) and GLAXOSMITHKLINE (+4%) closing the top ten. SANDOZ reduced its sales by 2% and moved two ranks down, giving way to SANOFI (+1%) and TEVA (+5%). The total share of the top ten did not virtually change and accounted for 34.9% vs 35% in a year-earlier period.

Figure 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten 2021	Rank in the top ten 2020	Manufacturer*	Share in total pharmacy sales, % 2021	Share in total pharmacy sales, % 2020
1	1	**BAYER**	4.7	4.6
2	2	OTCPHARM	4.6	4.3
3	3	**STADA**	4.0	4.0
4	4	**KRKA**	3.3	3.4
5	6	**SANOFI**	3.2	3.3
6	7	**TEVA**	3.2	3.2
7	5	**SANDOZ**	3.1	3.3
8	8	**SERVIER**	3.1	3.1
9	9	GEDEON RICHTER	3.0	3.0
10	10	**GLAXOSMITHKLINE**	2.7	2.8
Total			34.9	35.0

*AIPM members are in bold

Three from the ten top brands managed to hold their own in the ranking: NUROFEN (+3%), LORISTA (+2%) and CARDIOMAGNYL (+7 %) continued to keep their previous ranks four, six and seven, respectively (Table 2). Four brands were able to improve their positions. ARBIDOL (+60%) and XARELTO (+25%) moved up to ranks one and two, and the newcomers ELIQUIS (+94%) and DETRALEX (+26%) broke into the ranks of the top ten ranking, coming in at numbers three and five. THERAFLU (-4%), INGAVIRIN (-51%) and MIRAMISTIN (-3%), which reduced their sales and moved down to the lower ranks, closed the top ten ranking. The aggregate share of the top-10 expended from 8.3% to 8.8%.

Figure 2. The top ten brands by pharmacy sales

Rank in the top ten 2021	Rank in the top ten 2020	Brand	Share in total pharmacy sales, % 2021	Share in total pharmacy sales, % 2020
1	2	ARBIDOL	1.9	1.3
2	3	XARELTO	1.1	0.9
3	17	ELIQUIS	0.9	0.5
4	4	NUROFEN	0.8	0.8
5	12	DETRALEX	0.7	0.6
6	6	LORISTA	0.7	0.7
7	7	CARDIOMAGNYL	0.7	0.7
8	5	THERAFLU	0.7	0.7
9	1	INGAVIRIN	0.6	1.4
10	8	MIRAMISTIN	0.6	0.7
Total			8.8	8.3

Following the respective brand name, UMIFENOVIR (+59%) moved up to rank number one in the top ten INNs and grouping names ranking (Table 3). In addition to it, another five INNs scored ranking progress. IBUPROFEN (+4%), RIVAROXABAN (+25%) and DIOSMIN*HESPERIDIN (+25%) moved up to ranks three through five, and the newcomers of the top ten, APIXABAN (+94%) and INTERFERON ALFA-2B (+13%), moved up to ranks seven and ten, respectively. At the same time, they displaced INNs XYLOMETAZOLINE (-4%), BISOPROLOL (-0,4%) and NIMESULIDE (+3%) one rank down, to numbers two, six and eight, respectively. PANCREATIN (+%) held its previous rank nine. The aggregate share of the top-10 expended from 10.2% to 11.5%

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

Rank in the top ten 2021	Rank in the top ten 2020	INNs/Grouping Names	Share in total pharmacy sales, % 2021	Share in total pharmacy sales, % 2020
1	3	UMIFENOVIR	2.1	1.4
2	1	XYLOMETAZOLINE	1.6	1.7
3	4	IBUPROFEN	1.3	1.3
4	6	RIVAROXABAN	1.1	0.9
5	8	DIOSMIN*HESPERIDIN	1.0	0.9
6	5	BISOPROLOL	1.0	1.0
7	30	APIXABAN	0.9	0.5
8	7	NIMESULIDE	0.9	0.9
9	9	PANCREATIN	0.9	0.9
10	13	INTERFERON ALFA-2B	0.8	0.7
Total			11.5	10.2

M01 Anti-inflammatory and antirheumatic products (+8%) became the best-selling group on the regional market, C09 Agents acting on the rennin-angiotensin system (+2%) held its previous rank two (Table 4). J05 Antivirals for systemic use, which sales reduced by 10%, moved down from rank one to three. The groups B01 Antithrombotic agents (+21%) and G03 Sex hormones (+5%) moved up to ranks four and five from the lower ones, displacing R01 Nasal preparations (+4%) to rank six. J01 Antibacterials for systemic use (-12%) and N02 Analgesics (-4%) moved down to the lower ranks due to reduction in sales. R05 Cough and cold preparations (+5%), which held it previous rank nine, and the newcomer C05 Vasoprotectives (+15%) closed the top ten ranking. The total share of the analysed ranking accounted for 37.9% against 39.1% in a year-earlier period.

Figure 4. The top ten ATC Groups by pharmacy sales

Rank in the top ten 2021	Rank in the top ten 2020	ATC code	ATC group	Share in total pharmacy sales, % 2021	Share in total pharmacy sales, % 2020
1	3	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.9	4.8
2	2	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	4.8	4.9
3	1	J05	ANTIVIRALS FOR SYSTEMIC USE	4.7	5.4
4	8	B01	ANTITHROMBOTIC AGENTS	3.9	3.4
5	6	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.6	3.6
6	5	R01	NASAL PREPARATIONS	3.6	3.7
7	4	J01	ANTIBACTERIALS FOR SYST USE	3.4	4.1
8	7	N02	ANALGESICS	3.2	3.5
9	9	R05	COUGH AND COLD PREPARATIONS	3.1	3.1
10	14	C05	VASOPROTECTIVES	2.7	2.5
Total				37.9	39.1

Conclusion. In 2021, the retail market of the Far Eastern Federal District brought in RUB 66.047 bil. (USD 897.747 mil.), which was by 6% in terms of roubles and 4% in terms of dollars more than in 2020. In physical terms, the market reduced (-7%) and amounted to 270.904 mil. packs. In 2021, the average cost of an FPP pack in the city pharmacies was USD 3.31, which was higher than in the year-earlier period (USD 2.96), but lower than the national average (USD 3.72). The average drug expenses of the district residents were also lower than the national average expenses in Russia (110.50 USD vs. 113.94 USD).