СОВМЕСТНАЯ ПУБЛИКАЦИЯ
АССОЦИАЦИИ МЕЖДУНАРОДНЫХ ФАРМАЦЕВТИЧЕСКИХ ПРОИЗВОДИТЕЛЕЙ И ГК РЕМЕДИУМ

РЕМЕДИУМ
ГРУППА КОМПАНИЙ

AIPM®

Association of International Pharmaceutical Manufacturers

Ассоциация международных фармацевтических производителей

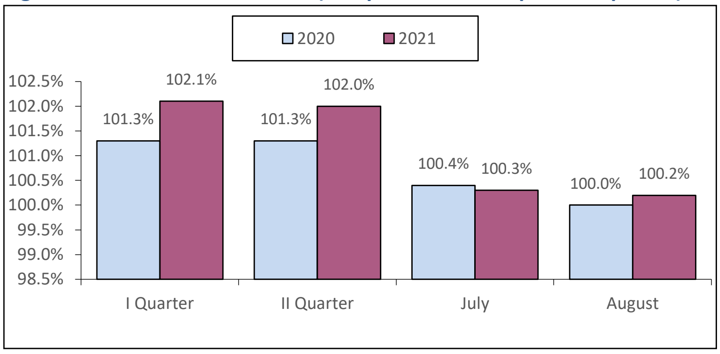
MACROECONOMIC INDICES

Inflation

According to Federal State Statistics Service's data, the Consumer Price Index was estimated as 100.2% in August 2021, compared to the previous month, 104.7% compared to December 2020.

In August 2021, the Producer Price Index for industrial production was 101.5% as compared to the previous month, in the month-earlier period it had amounted to 102.6%. The index accounted for 124.8% against December of 2020.

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



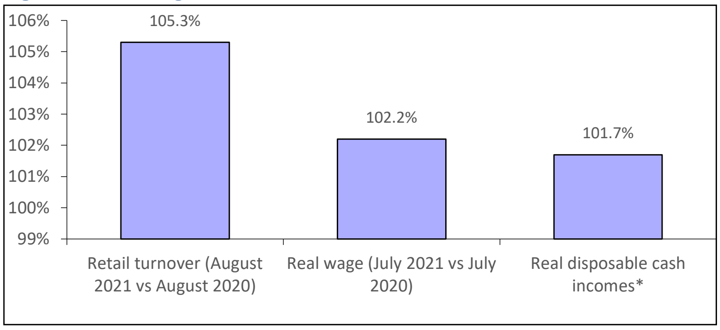
Living standard

In July 2021, a gross monthly average wage of corporate employees reached RUB 55170 (USD 746.35). It increased by 108.8% compared to July 2020, and 93.8% compared to the previous period. In July 2021, the real gross wage accounted for 102.2% as compared to July 2020, and 93.5% against the prior period. According to estimates[1], real disposable cash incomes increased by 1.7% in the first half of 2021 compared to the first half of 2020 (Fig. 2).

Retail turnover

In August 2021, the retail turnover was equal to RUB 3419.4 bil. or 105.3% (in comparable prices) against the respective period of the previous year, and RUB 24809.4 bil. or 108.8% in January - August 2021 (Fig. 2).

Figure 2. Real wage and retail turnover



* First half of 2021 vs first half of 2020

Industrial Production

According to Federal State Statistics Service's data, Industrial Production Index accounted for 104.7% in August 2021 as compared to the same period in the previous year, and 104.5% in January-August of 2021.

According to Federal State Statistics Service's data, Industrial Production Index of drugs and medical products for human use accounted for 128.8% in August 2021 as compared to the relevant period of 2020, and 121.0% in January-August vs January-August 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 August 2021.

Table 1. The top ten Russian chemical and pharmaceutical manufacturers by sales volume in August 2021

Rank in the top ten	Manufacturer	RUB mil.
1	Otcpharm	3274.0
2	Biocad	2995.4
3	Stada	2504.0
4	R-Pharm	2094.7
5	Binnopharm	1960.4
6	Pharmasyntez	1740.7
7	Marathon Pharma	1692.8
8	Microgen	1522.2
9	Pharmstandart	1487.9
10	Promomed	1331.9

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) decreased in seven regions in July 2021, compared to the previous month. The most pronounced reduction in sales was observed in Moscow (-22%), the least one in Rostov Region and Perm (-2% each). The growth in sales was observed in three regions, the most noticeable one in the Krasnodar Territory (+13%).

Table 2. Pharmacy sales in the regions, 2021

Region	Pharmacy sales, $ mil. (wholesale prices)			Growth gain, % (roubles)		
	May 2021	June 2021	July 2021	May/ April 21	June/May 21	July/June 21
Moscow	136.2	167.3	127.9	-12%	20%	-22%
St. Petersburg	53.8	76.2	59.5	-15%	39%	-20%
Krasnodar Krai	38.0	46.3	51.4	-9%	19%	13%
Krasnoyarsk Krai	21.2	25.8	24.2	-11%	19%	-4%
Tatarstan	17.9	20.4	21.6	-12%	12%	8%
Rostov Region	22.6	26.1	24.9	-9%	13%	-2%
Novosibirsk Region	18.7	27.0	25.5	-11%	41%	-4%
Voronezh Region	12.9	15.3	13.7	-9%	17%	-9%
Perm	8.3	9.4	9.1	-13%	11%	-2%
Tyumen	7.7	8.8	8.7	-10%	12%	1%

Advertising

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

Table 3. Top five advertisers in mass media in August 2021

Rank in the top ten	Company*	Quantity of broadcasts
1	Otcpharm	9,588
2	Sanofi	7,119
3	Berlin-Chemie/Menarini	6,238
4	Sandoz	6,021
5	Dr. Reddy's Laboratories	5,561

Source: Remedium according to Mediascope's data

Table 4. Top five brand names in mass media in August 2021

Rank in the top ten	Brand*	Quantity of broadcasts
1	Pentalgin	2,670
2	Linex	2,564
3	Exoderil	1,890
4	Acipol	1,877
5	No-spa	1,648

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 FIRST SIX MONTHS RESULTS

According to DLO in RF™ IQVIA, the drugs supplies under the Federal Program amounted to RUB 81,757 bil. based on the results for the first six months of 2021 (USD 1.099 bil.) at contractual prices. The segment volume increased 9% in terms of roubles, and 1% in terms of dollars as compared to the same period in 2020. Scope of supplies in pack terms decreased by 7% to 43.262 mil. packs. The average cost of a FPP pack through the DLO program was USD 25.39 in contractual prices (a year ago it was USD 23.39).

In January-June 2021, GENERIUM (+11%[2]) moved up to rank number one in the DLO segment, displacing TAKEDA (-5%), which was the leader, but showed negative growth rates (Table 1). CELGENE (+24%), JOHNSON & JOHNSON (+4%), BIOCAD (-5%) and NOVARTIS (+10%) continued to hold ranks from three through five and seven, respectively. SANOFI (-16%), OCTAPHARMA (-1%) and NOVO NORDISK (-10%), which reduced their purchases, moved down to the lower three ranks. The only newcomer of the top 10 ranking ROCHE (3.2-fold growth in purchases) moved up to rank six. The total share of the top 10 drug manufacturers within DLO Program reduced from 61.9% to 61.3%.

Table 1. The top 10 drug manufacturers for DLO

Rank in the top ten		Manufacturer*	Share in total DLO volume, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	2	GENERIUM ZAO RF	10.8	10.6
2	1	**TAKEDA**	10.4	12.0
3	3	**CELGENE**	8.5	7.5
4	4	**JOHNSON & JOHNSON**	6.8	7.1
5	5	BIOCAD RF	6.1	7.0
6	15	**ROCHE**	4.6	1.6
7	7	**NOVARTIS**	4.5	4.4
8	6	**SANOFI**	3.5	4.6
9	8	OCTAPHARMA	3.5	3.9
10	9	**NOVO NORDISK**	2.7	3.2
Total			61.3	61.9

*AIPM members are in bold

Four newcomers broke into the top ten brands ranking (Table 2). OCTOFACTOR (+94%) and OCREVUS, as well as TYSABRI (+14%) and PLEGRIDY (+31%) moved up to ranks two, seven and two. The markets of the brands REVLIMIDE (+23%) and ADVATE (+29%) developed at a high pace, which allowed the former to maintain and strengthen its leadership, and the latter to move up to rank four. At the same time, ELAPRASE (-5%) and DARZALEX (-29%), which showed negative growth rates, on the contrary, moved down to ranks three and eight. ACELLBIA (+7%) and ELIZARIA (+0.3%) kept their previous ranks five and six. The total share of the top ten brands grew by nearly 4 p.p. up to 32.3%.

Table 2. The top 10 Brands in DLO segment

Rank in the top ten		Brand	Share in total DLO volume, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	1	REVLIMIDE	8.4	7.5
2	11	OCTOFACTOR	3.8	2.1
3	2	ELAPRASE	3.3	3.8
4	7	ADVATE	3.2	2.8
5	5	ACELLBIA	2.9	3.0
6	6	ELIZARIA	2.7	2.9
7	N/A	OCREVUS	2.1	N/A
8	4	DARZALEX	2.0	3.1
9	12	TYSABRI	1.9	1.8
10	15	PLEGRIDY	1.8	1.5
Total			32.3	28.5

Just as the corresponding brand, LENALIDOMIDE (+23%) continued to hold rank number one in the top 10 INN and group names ranking (Table 3). In addition, RITUXIMAB (+8%), FACTOR VIII (+4%), IDURSULFASE (-5%) and ECULIZUMAB (-0.3%) held their own in the ranking. The newcomers MOROCTOCOG ALFA (+94%) and OCRELIZUMAB, which broke into the top ten ranking, and OCTOCOG ALFA (+29%), which moved up to rank six from ten, were able to improve their positions. At the same time, INTERFERON BETA-1A (-24%) and DARATUMUMAB (-29%), which significantly reduced their purchase volumes, on the contrary, moved down to rank seven and the last one. The total share of the top 10 increased from 34.9% to 36.9%.

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

Rank in the top ten		INNs/Grouping Names	Share in total DLO volume, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	1	LENALIDOMIDE	8.4	7.5
2	2	RITUXIMAB	4.5	4.5
3	3	FACTOR VIII	4.1	4.3
4	12	MOROCTOCOG ALFA	3.8	2.1
5	5	IDURSULFASE	3.3	3.8
6	10	OCTOCOG ALFA	3.2	2.8
7	4	INTERFERON BETA-1A	2.7	3.9
8	8	ECULIZUMAB	2.7	2.9
9		OCRELIZUMAB	2.1	
10	7	DARATUMUMAB	2.0	3.1
Total			36.9	34.9

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

The top ten INNs and grouping names showed high stability: it didn't change in composition, and half of its INNs held their own in the ranking (Table 4). Among them were L04 Immunosuppressants (+25%), B02 Antihemorrhagics and L01 Antineoplastic agents (+12% each), as well as A10 Drugs used in diabetes (-3%) which topped the ranking. H01 PITUITARY and hypothalamic hormones and analogues (-5%) rounded out the top ten ranking, as in the previous year. The other top 10 ATC groups changed their positions; and only two of them rose in the ranks. A16 Other alimentary tract and metabolism products (+5%) moved up one rank, B01 Anticoagulants (+75%) moved up two ranks. Groups L03 Immunostimulants (-11%), R03 Drugs for obstructive airway diseases (-7%) and B03 Anti-anaemic preparations (-18%), on the contrary, lost one rank each. The total share of the top ten ranking increased from 87.6% to 88.5%.

Table 4. The top ten ATC groups in DLO segment

Rank in the top ten		ATC code	ATC group	Share in total DLO volume, %	
6 mon. 2021	6 mon. 2020			6 mon. 2021	6 mon. 2020
1	1	L04	IMMUNOSUPPRESSANTS	25.7	22.5
2	2	B02	ANTIHEMORRHAGICS	19.8	19.2
3	3	L01	ANTINEOPLASTIC AGENTS	12.0	11.7
4	4	A10	DRUGS USED IN DIABETES	8.5	9.6
5	6	A16	OTHER ALIMENTARY TRACT AND METABOLISM PRODUCTS	7.7	8.0
6	5	L03	IMMUNOSTIMULANTS	6.8	8.4
7	9	B01	ANTITHROMBOTIC AGENTS	2.7	1.7
8	7	R03	DRUGS FOR OBSTRUCTIVE AIRWAY DISEASES	2.3	2.7
9	8	B03	ANTIANEMIC PREPARATIONS	1.6	2.2
10	10	H01	PITUITARY, HYPOTHALAMIC HORMONES AND ANALOGUES	1.4	1.6
Total				88.5	87.6

Data on supplies to the top ten regions of Russia under State Reimbursement Program (DLO) are shown in Table 5. Moscow continued to demonstrate the largest volumes of purchases though its share in total volume reduced to 8.5%. The Moscow Region with a share of 4.7% moved to rank two in the ranking, displacing the Krasnodar Territory from that line. The Sverdlovsk region and Tatarstan moved to ranks four and five. Due to a 15% decrease in the volume of purchases, St. Petersburg, which previously held rank three, moved down to rank six. The cumulative share of the top ten regions decreased by 1 p.p. and accounted for 37.5%.

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

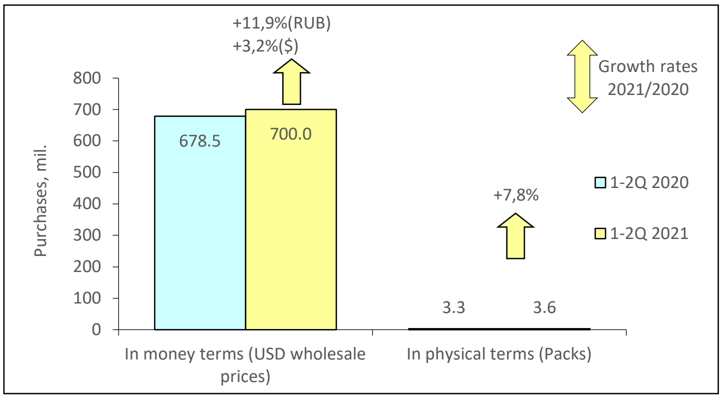
Rank in the top ten		Region	Share in total DLO volume, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	1	Moscow	8.5	10.9
2	4	Moscow Region	4.7	3.3
3	2	Krasnodar Krai	3.8	3.8
4	5	Sverdlovsk Region	3.6	3.2
5	6	Tatarstan Republic	3.1	3.1
6	3	Saint Petersburg	3.0	3.8
7	7	Novosibirsk Region	3.0	3.0
8	10	Rostov Region	2.7	2.5
9	13	Bashkortostan Republic	2.5	2.1
10	8	Tyumen Region	2.5	2.7
Total			37.5	38.5

Conclusion. On the basis of the results for the first half of 2021, the DLO segment brought in RUB 81.757 bil. (USD 1.099 bil.) at contractual prices, which was by 9% in terms of roubles and by 1% in terms of dollars more than in the same period of 2020. In pack terms, the supplies under the program decreased by 7% to 43.262 mil. packs. The average cost of FPP included in the DLO Programme increased as compared to the past year (USD 25.39 vs USD 23.39).

COST-INTENSIVE NOSOLOGIES (VZN) PROGRAM, 1-2 Q 2021

In the first half of 2021, supplies under the VZN drug supply program (according to IQVIA) in value terms increased by 3.2%, amounting to USD 700 bil. (RUB 52.1 bil.) as compared to 1-2 quarter of 2020. in terms of packs, VZN purchases increased by 7.8% (3.6 mil. packs).

Figure 1. Purchases trend under the VZN Program in 1-2 Q 2021 vs 1-2 Q 2020



The groups of drugs to treat systemic-onset juvenile arthritis (+38%), drugs to treat cystic fibrosis (+27%), and drugs used in transplantation (+21%) showed the largest increase in purchases in terms of roubles as compared to the same period of the previous year. A negative increase in the purchases was recorded in the groups of drugs to treat pituitary dwarfism (-44%) and Gaucher disease fibrosis (-6%). In the 1-2 quarter of 2021, the group of drugs for the treatment of haemophilia remain 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.

Table 1. Supplies pattern under the VZN Program

Nosologies	INN	Share in total VZN supplies (RUB), %	
		1-2Q 2021	1-2Q 2020
Haemophilia		**30.7**	**30.7**
	FACTOR VIII	6.4	6.9
	MOROCTOCOG ALFA	5.9	3.4
	OCTOCOG ALFA	5.1	4.4
	FACTOR VON WILLEBRAND*FACTOR VIII	3.9	3.9
	EPTACOG ALFA (ACTIVATED)	2.8	4.2
	FACTOR VIII INHIBITOR BYPASSING FRACTION	2.1	5.4
	FACTOR IX	1.9	2.0
	EMICIZUMAB	1.7	0.0
	NONACOG ALFA	0.6	0.5
	SIMOCTOCOG ALFA	0.4	0.0
Oncohematology		**24.8**	**24.9**
	LENALIDOMIDE	13.2	12.0
	RITUXIMAB	6.9	6.7
	DARATUMUMAB	3.1	4.9
	BORTEZOMIB	1.0	0.6
	IMATINIB	0.4	0.4
	FLUDARABINE	0.2	0.3
Sclerosis Multiplex		**20.1**	**19.8**
	INTERFERON BETA-1A	4.3	6.3
	OCRELIZUMAB	3.3	0.0
	NATALIZUMAB	3.0	2.9
	PEGINTERFERON BETA-1A	2.9	2.5
	TERIFLUNOMIDE	2.3	2.7
	INTERFERON BETA-1B	1.9	2.7
	GLATIRAMER ACETATE	1.6	1.8
	ALEMTUZUMAB	1.0	1.0
Mucopolysaccharidosis type I, II and VI		**9.8**	**10.1**
	IDURSULFASE	5.3	6.2
	GALSULFASE	2.6	2.6
	LARONIDASE	1.1	1.2
	IDURSULFASE BETA	0.9	0.1
Hemolytic-uremic syndrome		**4.2**	**4.7**
	ECULIZUMAB	4.2	4.7
Transplantation		**3.9**	**3.6**
	TACROLIMUS	2.5	2.5
	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.		**3.1**	**2.5**
	CANAKINUMAB	2.5	1.9
	TOCILIZUMAB	0.6	0.5
	ETANERCEPT	0.0	0.0
	ADALIMUMAB	0.0	0.0
Gaucher disease		**1.8**	**2.1**
	IMIGLUCERASE	1.0	1.5
	VELAGLUCERASE ALFA	0.8	0.7
Mucoviscidosis		**1.4**	**1.2**
	DORNASE ALFA	1.4	1.2
Pituitary dwarfism		**0.2**	**0.3**
	SOMATROPIN	0.2	0.3

Generium held its previous rank number one in the top ten manufacturers ranking in the first half of 2021 (Table 3). The purchases of drugs produced by this company increased by 11%, and the share in the supply pattern under the VZN program remained at the level of 16% to 17%. The main growth was provided by an increase in purchases of Octofactor (+94%) for the treatment of haemophilia. Elizaria moved up from rank 10 to 2 in the brands ranking. The top 10 also includes the biosimilar Elizaria for the treatment of atypical haemolytic uremic syndrome (with a slight increase in sales +0.6%). Takeda moved up to rank two in the top ten manufacturers ranking. The purchases of Takeda drugs decreased 5.5% and the share in the VZN segment pattern reduced from 19% to 16% as compared to the same period in the previous year (Table 3). Elaprase to treat mucopolysaccharidosis type II (-4.6%) and recombinant coagulation factor VIII Advate (+28.6%) made up the main volume of sales of the company. All of them broke into the top ten brands ranking and moved up to ranks three and four (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 increased its share in the supply pattern from 12% to 13% (Table 2).

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

Rank in the top ten		Brand	Share in total VZN supplies, %	
1-2Q 2021	1-2Q 2020		1-2Q 2021	1-2Q 2020
1	1	REVLIMIDE	13.2%	12.0%
2	10	OCTOFACTOR	5.9%	3.4%
3	2	ELAPRASE	5.3%	6.2%
4	6	ADVATE	5.1%	4.4%
5	7	ACELLBIA	4.5%	4.3%
6	5	ELIZARIA	4.2%	4.7%
7		OCREVUS	3.3%	
8	4	DARZALEX	3.1%	4.9%
9	11	TYSABRI	3.0%	2.9%
10	14	PLEGRIDY	2.9%	2.5%
Total			50.4%	52.9%

A 2.6% decrease in total sales of Johnson & Johnson, which moved down to rank 4 in the manufacturers ranking, did not lead to a change in the position in the top ten manufacturers ranking. The decrease in sales of the company may be associated with a decrease in purchases of Darzalex (Daratumumab), which is indicated for multiple myeloma (-29%). The company's novel drug for the treatment of multiple sclerosis, Plegridy (Peginterferon beta 1) (+30%), as well as Tysabri, which moved up from rank 11 to 9, broke into the top 10 brands ranking (Table 2). Biocad hold its previous rank five in the ranking. Acellbia (Rituximab), the leading drug of the manufacturer, moved down to rank 5 in the brands ranking (Table Roche's novel drug for the treatment of multiple sclerosis, Ocrevus (Ocrelizumab), which purchases are in 1-2 quarter of 2021 amounted to over RUB 1.7 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.

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

Rank in the top ten		Manufacturer*	Share in total VZN supplies, %	
1-2Q 2021	1-2Q 2020		1-2Q 2021	1-2Q 2020
1	2	GENERIUM ZAO RF	16.9%	17.0%
2	1	**TAKEDA**	16.1%	19.0%
3	3	CELGENE	13.2%	12.0%
4	4	**JOHNSON & JOHNSON**	8.9%	10.3%
5	5	BIOCAD RF	8.1%	9.4%
6	15	**ROCHE**	5.8%	1.0%
7	6	OCTAPHARMA	5.3%	6.0%
8	8	**CSL BEHRING GMBH**	2.9%	3.3%
9	13	**NOVARTIS**	2.8%	2.3%
10	9	**BIOMARIN IRELAND**	2.6%	2.6%
			82.6%	85.7%

*AIPM members are in bold

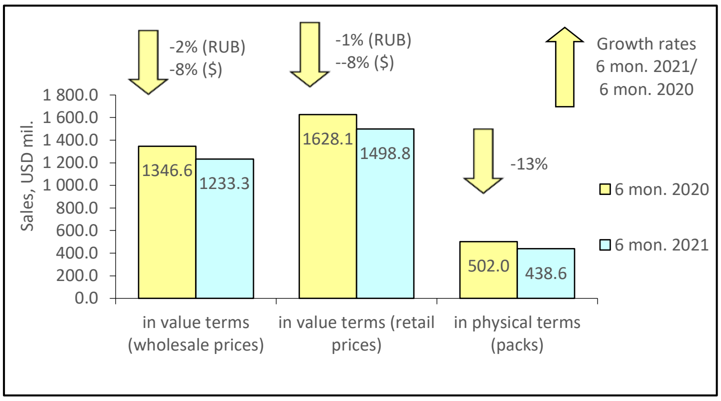
Conclusion: In the first half of 2021, purchases under the VZN programme increased as compared to 1-2 quarter of 2020. The share of domestically produced drugs increased from 29% to 31%, the share of localized products (final manufacturing stages) increased from 32% to 34%. The share of localized products (localization of the FFP stage) and the share of imported drugs remained virtually unchanged, 8% and 26%, respectively.

CFD PHARMACY MARKET (WITHOUT MOSCOW): 2021 FIRST SIX 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-June 2021, the average wage in the CFD (with Moscow) was RUB 69731 (USD 938.76), which was 28% higher than the average wage in Russia (RUB 54595).

According to the results of the Retail Audit of Finished Pharma Products (FPP) in Russian Federation™ IQVIA, at the end of the first six months of 2021 the sales of drugs in physical terms in the CFD (without Moscow) showed negative growth rates (-13%) to 438.604 mil. packs. In value terms, the market volume also decreased by 2% in terms of roubles and 8% in terms of dollars. At the same time, the market volume amounted to RUB 91.560 bil. (USD 1.233 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 3.42 against USD 3.24 at retail prices. At the end of January-June 2021, an average amount spent by the region residents for FPPs in the pharmacies amounted to USD 38.18.

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



At the end of the first six months of 2021, most of the top ten manufacturers showed negative growth rates on the pharmacy market of the Central Federal District (CFD) (excl. of Moscow) (Table 1). At the same time, almost all of them have kept their ranking positions unchanged. SANOFI (-13%), SERVIER and KRKA (-6% each), TEVA (-4%) and BERLIN-CHEMIE/ MENARINI (-7%) continued to hold rank two and five through eight, respectively. And only OTCPHARM (-11%) moved down one rank, displaced by STADA (+1%), which showed positive growth rates (+1%). GLAXOSMITHKLINE (+0.2%) and ABBOTT (+3%), which moved up to ranks nine and ten, and BAYER (+11%), which retained its leadership, showed growth in sales. The cumulative share of the top ten reduced by 0.4 p.p. and accounted for 35.3%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	1	**BAYER**	5.3	4.6
2	2	**SANOFI**	3.9	4.4
3	4	**STADA**	3.9	3.8
4	3	OTCPHARM	3.6	4.0
5	5	**SERVIER**	3.4	3.6
6	6	**KRKA**	3.3	3.5
7	7	**TEVA**	3.3	3.4
8	8	**BERLIN-CHEMIE/MENARINI**	2.9	3.1
9	10	**GLAXOSMITHKLINE**	2.9	2.8
10	11	**ABBOTT**	2.8	2.6
Total			35.3	35.7

*AIPM members are in bold

The first position in the Top 10 leading brands was maintained and strengthened by XARELTO (+48%) (Table. 2). Some shifts took place in the lower part of the top ten ranking, due to which three ATC brands rose in the ranks. ELIQUIS (+84%), DETRALEX (+12%) and MEXIDOL (+8%) moved up to ranks two through four, while PENTALGIN (+2%) moved up to rank seven from nine. The newcomers HEPTRAL (+59%) and CARDIOMAGNYL (+6%) moved up to the last two ranks of the top ten ranking. CONCOR and ARBIDOL, and NUROFEN (-5%), which reduced their sales by 1%, moved down to the lower ranks five, six and eight, respectively. The total share of the top 10 brands increased from 7.1% to 8.7%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	1	XARELTO	1.8	1.2
2	10	ELIQUIS	1.2	0.6
3	6	DETRALEX	0.8	0.7
4	5	MEXIDOL	0.8	0.7
5	3	CONCOR	0.8	0.8
6	4	ARBIDOL	0.8	0.8
7	9	PENTALGIN	0.7	0.6
8	7	NUROFEN	0.7	0.7
9	24	HEPTRAL	0.6	0.4
10	11	CARDIOMAGNYL	0.6	0.6
Total			8.7	7.1

The top INN and generic names ranking leader changed (Table 3). RIVAROXABAN (+48%) moved up to rank one from three, displacing its former leader XYLOMETAZOLINE (+0,4%) to rank two. Another three 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 five and DIOSMIN*HESPERIDIN (+16%) and ETHYLMETHYLHYDROXYPYRIDINE (+ 10%) moved one rank up. The remaining five INNs showed negative growth rates and fell in the ranks. Thus, BISOPROLOL (-2%) and DICLOFENAC (-3%) lost two points each, NIMESULIDE (-3%), IBUPROFEN (-1%) and PANCREATIN (-2%) moved one rank down. The total share of the top 10 increased from 10.3% to 11.8%.

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

Rank in the top ten		INNs/Grouping Names	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	3	RIVAROXABAN	1.8	1.2
2	1	XYLOMETAZOLINE	1.6	1.5
3	4	DIOSMIN*HESPERIDIN	1.3	1.1
4	2	BISOPROLOL	1.2	1.2
5	19	APIXABAN	1.2	0.6
6	5	NIMESULIDE	1.0	1.0
7	6	IBUPROFEN	1.0	1.0
8	7	PANCREATIN	1.0	1.0
9	10	ETHYLMETHYLHYDROXYPYRIDINE	0.9	0.8
10	8	DICLOFENAC	0.9	0.9
Total			11.8	10.3

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 (+28%), moved up to rank two from three, displacing M01 Anti-inflammatory and antirheumatic drugs (-1%) down one rank. Another four groups showed positive growth rates and rose in the ranks. R01 Nasal preparations (+2%), G03 Sex hormones (+0.2%) and C05 Vasoprotectives (+9%) as well as the newcomer N06 Psychoanaleptics (+6%) moved up to ranks four through six, respectively. N02 Analgesics retained their previous rank seven, despite an 8% decline in sales. J01 Antibacterials for systemic use (-19%) and J05 Antivirals for systemic use (-24%), which showed more pronounced negative growth rates, moved down to ranks eight and nine. In total, the top ten ATC groups accounted for 38.1% of the regional market, just as in a year earlier period.

Table 4. The top ten ATC Groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020			6 mon. 2021	6 mon. 2020
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.9	6.2
2	3	B01	ANTITHROMBOTIC AGENTS	5.3	4.0
3	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.0	4.9
4	6	R01	NASAL PREPARATIONS	3.6	3.4
5	8	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.3	3.2
6	9	C05	VASOPROTECTIVES	3.2	2.8
7	7	N02	ANALGESICS	3.1	3.3
8	5	J01	ANTIBACTERIALS FOR SYST USE	3.1	3.7
9	4	J05	ANTIVIRALS FOR SYSTEMIC USE	2.9	3.8
10	11	N06	PSYCHOANALEPTICS	2.9	2.7
Total				38.1	38.1

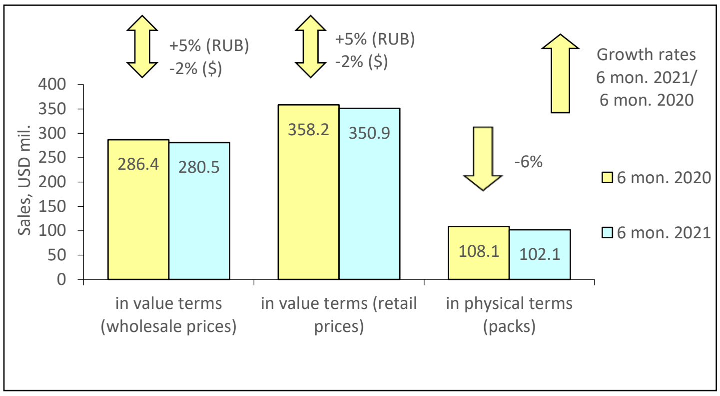
Conclusion. At the end of the first six months of 2021, the pharmacy market of the Central Federal District (without Moscow) brought in RUB 111.268 bil. (USD 1.499 bil.), which was 1% more in terms of roubles and 8% less in terms of dollars than in the same period of 2020. In pack terms, the market also showed negative growth rates (-13%) and achieved 438.604 mil. packs. In January-June of 2021, the average cost of an FPP pack in the regional pharmacies was USD 3.42, which was higher than the last year figure (USD 3.24), and less than the national average (USD 3.59). However, the average medicine expenses of the CFD residents were higher than the national average expenses in Russia (USD 38.18 vs USD 49.57).

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

According to Federal State Statistics Service, as of January 1, 2021 estimated population of the North-Western Federal District (NWFD) (excl. 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-June 2021 was RUB 61092 (USD 822.46), which was 12% higher than the average wage in Russia (RUB 54595).

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 6% decrease to 102.136 mil. Packs in the first half of 2021. In money terms, the market saw a 5% increase in terms of roubles and 2% decrease in terms of dollars. At the same time, the volume of the market achieved RUB 20.829 bil (USD 280.528 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 3.44 vs. USD 3.31 at retail prices in the year-earlier period. The average amount spent by the residents of the region for FPPs in the pharmacies for six months amounted to USD 25.17.

Figure 1. The NWFD (excl. of St. Petersburg) pharmacy market for six months of 2020 – six months of 2021



BAYER (+10%) held and reinforced its leading positions in the top ten manufacturers ranking in the pharmacy market of NWFD at the end of January-June period 2021 (Table 1). Due to a 5% decrease in sales, OTCPHARM, which had held rank two, moved one rank down, giving way to SERVIER (+1%). In addition to the leader, another two manufacturers STADA (+13%) and GLAXOSMITHKLINE (+23%) also demonstrated outperformance growth rates, moving up to ranks four and nine, respectively. On top of that, the latter became the only newcomer of the top 10 ranking. SANOFI, KRKA and SANDOZ, which reduced their sales by 4%, on the contrary, lost one rank each and moved down to ranks five, six and the last rank, respectively. TEVA (+1%) and GEDEON RICHTER (+3%) as before held their previous ranks seven and eight. The cumulative share of the top 10 manufacturers reduced from 37.9% to 37.0%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	1	**BAYER**	5.3	5.0
2	3	**SERVIER**	4.0	4.2
3	2	OTCPHARM	4.0	4.4
4	6	**STADA**	3.9	3.7
5	4	**SANOFI**	3.8	4.1
6	5	**KRKA**	3.7	4.0
7	7	**TEVA**	3.3	3.4
8	8	GEDEON RICHTER	3.3	3.3
9	11	**GLAXOSMITHKLINE**	3.0	2.5
10	9	**SANDOZ**	2.9	3.1
Total			37.0	37.9

*AIPM members are in bold

In the top 10 brands ranking, the positions of its leader XARELTO (+22%) and CONCOR (+2%) and LORISTA (-6%), placed at ranks 4 and 7, remained unchanged (Table 2). Five drug manufacturers from the top 10 ranking rose in the ranks. ARBIDOL (+48%), ELIQUIS (+30%) and DETRALEX (+15%) moved up to ranks two, three and six. The newcomers CARDIOMAGNYL (+13%) and MEXIDOL (+21%) broke into the top ten ranking, moving up to ranks eight and nine. In contrast, the brands NUROFEN (-7%) and INGAVIRIN (-24%) reduced their sales and moved down to rank five and the last one respectively. The total share of the top ten brands ranking increased by 0.5 p.p. and achieved 8.5%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	1	XARELTO	1.4	1.2
2	3	ARBIDOL	1.2	0.9
3	5	ELIQUIS	1.0	0.8
4	4	CONCOR	0.8	0.8
5	2	NUROFEN	0.8	0.9
6	8	DETRALEX	0.8	0.7
7	7	LORISTA	0.7	0.8
8	12	CARDIOMAGNYL	0.6	0.6
9	15	MEXIDOL	0.6	0.5
10	6	INGAVIRIN	0.6	0.8
Total			8.5	8.0

In contrast to the above rankings, the leader of the top ten INNs and grouping names ranking changed (Table 3). RIVAROXABAN (+22%) moved up to rank one from four, displacing XYLOMETAZOLINE (+12%) and BISOPROLOL (+1%) one rank down. UMIFENOVIR (+44%), one of two newcomers, moved up to rank four in the ranking. The second newcomer APIXABAN (+30%) moved up to rank nine. DIOSMIN*HESPERIDIN (+18%) and ATORVASTATIN (+10%) held their previous ranks five and eight. The less dynamic IBUPROFEN (+0.4%) and NIMESULIDE (+4%), as well as LOSARTAN (-2%), which reduced its sales, moved down to ranks six, seven and ten, respectively. In total, ten INNs and group names accounted for 11.8% against 11.0% in the year-earlier period.

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

Rank in the top ten		INNs/Grouping Names	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	4	RIVAROXABAN	1.4	1.2
2	1	XYLOMETAZOLINE	1.4	1.3
3	2	BISOPROLOL	1.3	1.3
4	11	UMIFENOVIR	1.2	0.9
5	5	DIOSMIN*HESPERIDIN	1.2	1.1
6	3	IBUPROFEN	1.2	1.2
7	6	NIMESULIDE	1.0	1.1
8	8	ATORVASTATIN	1.0	1.0
9	14	APIXABAN	1.0	0.8
10	7	LOSARTAN	0.9	1.0
Total			11.8	11.0

C09 Agents acting on the rennin-angiotensin system (+1%), M01 Anti-inflammatory and antirheumatic products (+5%), B01 Antithrombotic agents and G03 Sex hormones (+16%) continued to be the best-selling groups on the regional market (Table 4). Note that the latter two showed the outstripping growth rates and expanded its market share. The markets of another two groups R01 Nasal preparations (+14%) and C05 Vasoprotectives (+10%) also developed by high growth rates, which allowed them to move up to ranks five and seven, respectfully. the remaining four groups from the top ten reduced their sales. At the same time, J05 Antivirals for systemic use (-12%), N02 Analgesics (-7%) and R05 Cough and cold preparations (-1%) moved down to ranks six and two bottom lines, while J01 Antibacterials for systemic use (-3%) held their previous rank eight. The top ten ATC groups accounted for 39.2% of the regional pharmacy sales, 39.6% in the year-earlier period.

Table 4. The top ten ATC Groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020			6 mon. 2021	6 mon. 2020
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	6.6	6.9
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.3	5.3
3	3	B01	ANTITHROMBOTIC AGENTS	4.5	4.0
4	4	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.3	3.9
5	6	R01	NASAL PREPARATIONS	3.6	3.3
6	5	J05	ANTIVIRALS FOR SYSTEMIC USE	3.2	3.9
7	10	C05	VASOPROTECTIVES	3.0	2.9
8	8	J01	ANTIBACTERIALS FOR SYST USE	3.0	3.2
9	7	N02	ANALGESICS	2.9	3.3
10	9	R05	COUGH AND COLD PREPARATIONS	2.9	3.1
Total				39.2	39.6

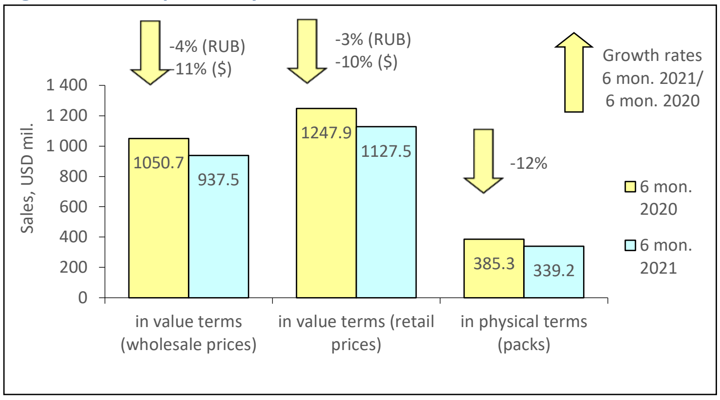
Conclusion. In January-June of 2021, the pharmacy market of the NWFD (without St Petersburg) brought in RUB 26.054 bil. (USD 350.906 mil.), which was 5% in terms of roubles more, but 2% in terms of dollars less than in the same period of 2020. In physical terms, the market reduced by 6% and amounted to 102.136 mil. packs. According to the results for the first half of 2021, the average cost of an FPP pack in the regional pharmacies was USD 3.44, which was more than the 2020 figure (USE 3.31), but lower than the national average across the country (USD 3.59). The FPP expenses of the district residents were lower than the national average expenses throughout Russia (USD 25.17 vs USD 49.57).

VFD PHARMACY MARKET: 2021 FIRST SIX 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-March 2021, the average salary in the VFD was RUB 39010 (USD 525.18), which was 29% lower than the national average wage in Russia (RUB 54595).

According to the results of IQVIA Retail Audit of OTC drugs in Russian Federation™, in January-June 2021 the pharmacy market of VFD in pack terms reduced by 12% to 339.228 mil. packs as compared to the previous year (Fig. 1) The sales in terms of wholesale prices decreased by 4% in terms of roubles and 11% in terms of dollars and reached RUB 69.620 bil. (USD 937.487 bil.), A region's share in the total pharmacy sales in Russia accounted for 15.6%. Based on the results for the first six months of 2021, the average cost of a FPP in the VFD pharmacies increased as compared with the year-earlier period (USD 3.24) and was equal to USD 3.32. The average per capita expenses for purchase of drugs in the pharmacies were estimated at USD 38.79.

Figure 1. Russia pharmacy market for six months 2020 – six months 2021



Just as the greater market, most of the top ten manufacturers on the retail Volga Federal District market, showed negative growth rates based on the results for the first half of 2021 (Table 1). BAYER (+4%) placed at rank number one and STADA (+2%), which moved up to rank three, became exceptions. Another two manufacturers managed to rise in the ranks despite reduction in sales. ABBOTT (-1%) and BERLIN-CHEMIE/MENARINI (-14%) moved up to ranks six and nine, respectively. At the same time, OTCPHARM (-8%), SANOFI and TEVA (-11% each) and SANDOZ (-19%) moved down to the lower ranks two, four, eight and ten. KRKA (-5%) and SERVIER (-6%) held their previous ranks five and seven. The total share of the top 10 brands reduced from 32.9% to 32.1%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	2	**BAYER**	4.2	3.9
2	1	OTCPHARM	4.0	4.2
3	4	**STADA**	3.6	3.4
4	3	**SANOFI**	3.5	3.8
5	5	**KRKA**	3.2	3.2
6	8	**ABBOTT**	2.9	2.8
7	7	**SERVIER**	2.9	3.0
8	6	**TEVA**	2.9	3.1
9	10	**BERLIN-CHEMIE/MENARINI**	2.4	2.7
10	9	**SANDOZ**	2.4	2.8
Total			32.1	32.9

*AIPM members are in bold

The top ten brands rating changed its leader: XARELTO (+35%) moved up one rank, coming in at number one (Table 2). ELIQUIS (+72%), one of two newcomers, moved up to rank two. The second one, HEPTRAL (+35%), moved up to rank five. In addition to the above, another brand, DETRALEX (+9%), which moved up from rank nine to seven, rose in the ranks. At the same time, they displaced PENTALGIN (+3%) down one rank, while ACTOVEGIN (-3%) and CONCOR (-4%), which reduced their sales, lost two rating points each. ARBIDOL (+16%), MEXIDOL (+9%) and CARDIOMAGNYL (-1%) held their previous ranks three, fourth and the last one. The total share of the top ten INN and group names ranking increased by 1.3 p.p. to 7.4%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	2	XARELTO	1.1	0.8
2	12	ELIQUIS	0.9	0.5
3	3	ARBIDOL	0.9	0.7
4	4	MEXIDOL	0.8	0.7
5	11	HEPTRAL	0.7	0.5
6	5	PENTALGIN	0.7	0.6
7	9	DETRALEX	0.6	0.6
8	6	ACTOVEGIN	0.6	0.6
9	8	CONCOR	0.6	0.6
10	10	CARDIOMAGNYL	0.5	0.5
Total			7.4	6.1

Only the leader of the top ten INNs and generic names INN XYLOMETAZOLINE (+3%) held its previous rank one in the ranking (Table 3). Six INNs managed to rise in the ranks. RIVAROXABAN (+35%) and DIOSMIN*HESPERIDIN (+8%) moved up to ranks two and three, displacing the less dynamic BISOPROLOL (+1%) and PANCREATIN (+0.2%). UMIFENOVIR (+17%) and ETHYLMETHYLHYDROXYPYRIDINE (+13%) moved up one rank, coming in at numbers six and seven. The newcomers APIXABAN (+72%) and ADEMETIONINE (+24%) rounded out the top ten ranking. Due to 7% reduction in sales, IBUPROFEN moved down from rank four to eight. In total, the top ten INNs and group names accounted for 10.4% of the regional market vs 8.8% in the year-earlier period.

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

Rank in the top ten		INNs/Grouping Names	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	1	XYLOMETAZOLINE	1.2	1.1
2	9	RIVAROXABAN	1.1	0.8
3	5	DIOSMIN*HESPERIDIN	1.1	1.0
4	3	BISOPROLOL	1.1	1.0
5	2	PANCREATIN	1.1	1.0
6	7	UMIFENOVIR	1.1	0.9
7	8	ETHYLMETHYLHYDROXYPYRIDINE	1.0	0.8
8	4	IBUPROFEN	0.9	1.0
9	25	APIXABAN	0.9	0.5
10	14	ADEMETIONINE	0.8	0.7
Total			10.4	8.8

C09 Agents acting on the rennin-angiotensin system (-2%) and M01 Anti-inflammatory and antirheumatic products (-5%) held and reinforced the top ranks in the top ten ATC-groups ranking despite the reduction in sales (Table 4). B01 Antithrombotic agents, which increased sales by 17%, moved to rank three. In addition to them, the groups R01 Nasal preparations and C05 Vasoprotectives (+2% each), which moved up to ranks eight and ten, showed positive growth rates. Although its sales decreased by 2%, the group G03 Sex hormones also managed to move one rank up. Three groups with more pronounced negative growth rates, J01 Antibacterials for systemic use (-14%) and J05 Antivirals for systemic use (-7%) moved down to ranks five, six and nine, respectively. Group N06 Psychoanaleptics (-1%) held its previous rank seven. In total, top ten ATC groups accumulated 37.2% of regional sales.

Table 4. The top ten ATC Groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020			6 mon. 2021	6 mon. 2020
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.9	5.7
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.1	5.1
3	6	B01	ANTITHROMBOTIC AGENTS	4.2	3.5
4	5	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.6	3.6
5	4	J01	ANTIBACTERIALS FOR SYST USE	3.4	3.8
6	3	J05	ANTIVIRALS FOR SYSTEMIC USE	3.2	4.2
7	7	N06	PSYCHOANALEPTICS	3.1	3.0
8	10	R01	NASAL PREPARATIONS	3.0	2.8
9	8	N02	ANALGESICS	2.9	3.0
10	12	C05	VASOPROTECTIVES	2.8	2.7
Total				37.2	37.3

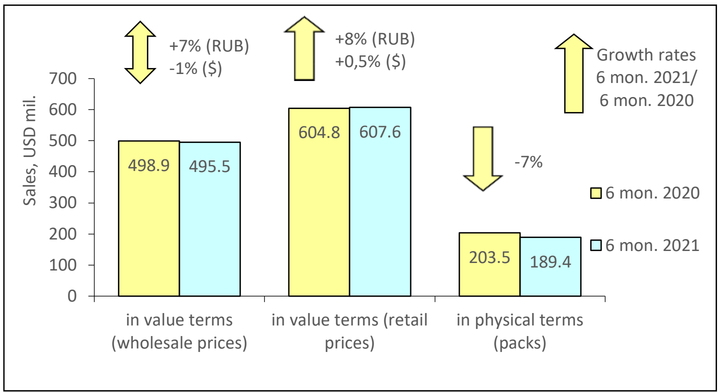
Conclusion. Based on the results for the first half of 2021, the pharmacy market in the VFD was estimated at RUB 83.733 bil. (USD 1.128 bil.) at retail prices. At the same time, the market behaviour was negative both in rouble (-3%) and dollar (-10%) terms. In physical terms, the sales reduced by 12% to 339.228 mil. packs. The average cost of OTC pack based on the results for January-June of 2021 was USD 3.32, which was higher compared to the previous period a year ago (USD 3.24) but lower the national average across Russia (USD 3.59). Per capita expenses of the district residents for purchase of medicines in the pharmacies were also lower than the national average figures (USD 38.79 vs. USD 49.57).

SOUTHERN FEDERAL DISTRICT PHARMACY MARKET: 2021 FIRST SIX 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-June 2021, the average salary in the SoFD was RUB 38386 (USD 516.77), which was 30% lower than the national average wage in Russia (RUB 54595).

According to the results of the Retail Audit of FPP (Finished Pharmaceutical Products) in Russian Federation™ IQVIA, at the end of the first six month of 2021 the sales of drugs in physical terms in the Southern Federal District saw a 7% decrease to 189.362 mil. packs. In value terms, the market showed positive growth rates in rouble terms (+7%), and negative in dollar terms (-1%), and reached RUB 36.788 bil. (USD 495.460 bil.) at wholesale prices (Fig. 1). The city market share accounted for 8.4% of the pharmacy sales in Russia. Based on the results for January-June 2021, the average cost of a finished pharma product (FPP) pack was USD 3.21 at retail prices vs. USD 2.97 in a year-earlier period. The average amount spent by residents of the SoFD for drugs amounted to USD 36.86 for six months of 2021.

Figure 1. The SoFD pharmacy market for six months of 2020 – six months 2021



At the end of the first half of 2021, six of the top ten manufacturers on the pharmacy market of the Southern Federal District (SoFD) showed positive outstripping growth rates (Table 1). The leading manufacturer BAYER, which held its previous rank number one, STADA, which held its previous rank four and SERVIER, which lost one point, increased 8% in sales each. The markets of OTCPHARM (+11%), ABBOTT (+15%) and BERLIN-CHEMIE/MENARINI (+10%) developed at a faster pace, which allowed them to rise in the ranks and move to ranks two, five, and seven, respectively. At the same time, SANOFI and TEVA, which reduced their sales by 3%, moved down to ranks three and eight. SANDOZ (-11%) and GLAXOSMITHKLINE (-2%) held their previous two bottom ranks in the top ten ranking. In total, the top ten manufacturers accounted for 32.6% of the Russian market, whereas in the year– earlier period they had accounted for 33.4%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	1	**BAYER**	4.7	4.6
2	3	OTCPHARM	3.8	3.6
3	2	**SANOFI**	3.5	3.9
4	4	**STADA**	3.4	3.4
5	7	**ABBOTT**	3.3	3.1
6	5	**SERVIER**	3.2	3.2
7	8	**BERLIN-CHEMIE/MENARINI**	3.1	3.0
8	6	**TEVA**	2.8	3.1
9	9	**SANDOZ**	2.5	3.0
10	10	**GLAXOSMITHKLINE**	2.4	2.6
Total			32.6	33.4

*AIPM members are in bold

The leader of the top-10 brands ranking changed. Due to 2.2-fold growth in sales, ELIQUIS moved up to rank one from seven, displacing XARELTO (+32%) one point down, despite the outstripping growth rates of the latter (Table 2). Note that another five INNs of the top ten ranking rose in the ranks. ARBIDOL and DETRALEX (+41% each) moved one rank up, coming in at numbers three and four, whereas ACTOVEGIN (+11%) moved two ranks up, at number seven. Two newcomers, HEPTRAL (+64%) and PENTALGIN (+17%) moved up to ranks five and eight. At the same time, the latter displaced MEXIDOL (+5%) down one rank. NUROFEN, which reduced its sales by 3%, lost three ranks. As before, CONCOR (+1%) held its previous rank ten in the ranking. The top ten brands accumulated 8.1% of the regional market, whereas in the year-earlier period their share was 6.5%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	7	ELIQUIS	1.3	0.6
2	1	XARELTO	1.2	1.0
3	4	ARBIDOL	0.9	0.7
4	5	DETRALEX	0.8	0.6
5	13	HEPTRAL	0.8	0.5
6	3	NUROFEN	0.7	0.7
7	9	ACTOVEGIN	0.6	0.6
8	12	PENTALGIN	0.6	0.5
9	8	MEXIDOL	0.6	0.6
10	10	CONCOR	0.5	0.6
Total			8.1	6.5

Despite the change of leader in the prior ranking, XYLOMETAZOLINE (+13%) held and reinforced its previous rank number one in the top ten INN and group names ranking (Table 3). Due to 2.2-fold growth in sales, the newcomer APIXABAN broke into the top ten ranking, moving up to rank two. Note that the markets of another six INNs in the top ten developed at a fast pace. In addition, two of them RIVAROXABAN (+32%) and UMIFENOVIR (+35%) moved up to ranks five and seven. The composition DIOSMIN*HESPERIDIN (+31%) and INN NIMESULIDE (+13%) held their previous ranks four and six, whereas PANCREATIN (+20%) and GABAPENTIN (+11%) lost one rank each. BISOPROLOL (+4%) and IBUPROFEN (+0.4%) moved down to the lower ranks, due to lagging rates. The total share of the top ten INNs accounted for 11.4% vs 9.8% in 2020.

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

Rank in the top ten		INNs/Grouping Names	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	1	XYLOMETAZOLINE	1.6	1.5
2	19	APIXABAN	1.3	0.6
3	2	PANCREATIN	1.2	1.1
4	4	DIOSMIN*HESPERIDIN	1.2	1.0
5	7	RIVAROXABAN	1.2	1.0
6	6	NIMESULIDE	1.0	1.0
7	10	UMIFENOVIR	1.0	0.8
8	5	BISOPROLOL	1.0	1.0
9	3	IBUPROFEN	1.0	1.0
10	9	GABAPENTIN	0.9	0.9
Total			11.4	9.8

M01 Anti-inflammatory and antirheumatic products (+8%) and C09 Agents acting on the rennin-angiotensin system (+1%) continued to show the largest sale volumes in the regional market (Table 4). B01 Antithrombotic agents (+32%) and J01 Antibacterials for systemic use (+15%) moved up to ranks three and four. R01 Nasal preparations (+8%) and C05 Vasoprotectives (+18%) improved their ranking positions by one point, moving up to ranks six and nine. At the same time, they displaced N06 Psychoanaleptics (+11%) to the last rank. J05 Antivirals for systemic use (-16%) and G03 Sex hormones (-3%) fell in the ranks and reduced their sales. As before, the group N02 Analgesics (+4%) held its rank eight. The cumulative share of the top 10 didn't change and accounted for 37.4%.

Table 4. The top ten ATC Groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020			6 mon. 2021	6 mon. 2020
1	1	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.1	5.0
2	2	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	4.7	5.0
3	4	B01	ANTITHROMBOTIC AGENTS	4.7	3.8
4	5	J01	ANTIBACTERIALS FOR SYST USE	3.8	3.6
5	3	J05	ANTIVIRALS FOR SYSTEMIC USE	3.4	4.3
6	7	R01	NASAL PREPARATIONS	3.2	3.2
7	6	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.2	3.5
8	8	N02	ANALGESICS	3.1	3.2
9	10	C05	VASOPROTECTIVES	3.1	2.8
10	9	N06	PSYCHOANALEPTICS	3.0	2.9
Total				37.4	37.3

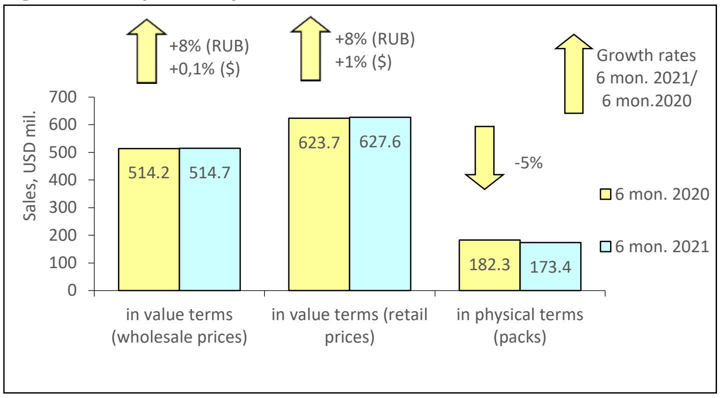
Conclusion. At the end of January-June of 2021, the pharmacy market of SoFD brought in RUB 45.115 bil. (USD 607.603 mil.) at retail prices. At the same time, the sales increased by 8% in terms of roubles and 0.5% in terms of dollars. In pack terms, the market showed reduction in sales (-7%) and amounted to 189.362 mil. packs. The average cost of an FPP pack in the pharmacies of the region amounted to USD 3.21, which was more than in the previous year (USD 2.97), but lower than the national average (USD 3.55). In the first half of 2021, the average expenses of the SoFD residents for FPPs in the pharmacies were also lower than the national average (USD 36.86 vs. USD 49.57).

UFD PHARMACY MARKET: 2021 FIRST SIX 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-June 2021, the average salary in the UFD was RUB 58578 (USD 788.61), which was 7% higher than the average wage in Russia (RUB 54595).

According to the results of IQVIA Retail Audit of Finished Pharma Products (FPP) in Russian Federation™ IQVIA, at the end of the first six months of 2021 the sales of FPP drugs in physical terms in the pharmacies of UFD saw a 5% decrease to 173.353 mil. packs. In money terms, the OTC drugs market showed positive growth rates (+8%) in rouble terms, and nearly zero (+0.1%) in dollar terms and reached RUB 38.224 bil. (USD 514.657 mil.) at wholesale prices (Fig. 1). The regional retail sales share accounted for 8.7% of all pharmacy sales in Russia. The average retail cost of an FPP pack in the first half of 2021 was USD 3.62 against USD 3.42 in the year-earlier period. In the analysed period, the average amount spent by residents of the UFD for drugs amounted to USD 50.90.

Figure 1. UFD pharmacy market for six months 2020 – six months 2021



The top ten manufacturers composition on the Ural Federal District retail market remained stable following the results for January-June 2021 (Table 1). Four of the top ten manufacturers ranking held their own in the ranking. BAYER (+7%) and OTCPHARM (+6%) held their leading ranks, and TEVA and SERVIER (+3% each) held their previous ranks five and six. The other four manufacturers showed signs of growth. The manufacturers STADA (+13%), ABBOTT (+6%), KRKA and GEDEON RICHTER (+11% each) moved one rank up. And only SANOFI (+0.1%) that showed almost zero growth rates and SANDOZ (-7%), which reduced its sales, moved down to ranks four and ten. The total share of the top 10 drug manufacturers reduced from 33.9% to 33.1%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	1	**BAYER**	4.4	4.5
2	2	OTCPHARM	3.9	4.0
3	4	**STADA**	3.8	3.6
4	3	**SANOFI**	3.7	3.9
5	5	**TEVA**	3.2	3.3
6	6	**SERVIER**	3.0	3.1
7	8	**ABBOTT**	2.9	3.0
8	9	**KRKA**	2.8	2.7
9	10	GEDEON RICHTER	2.8	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). LORISTA (+9%) and ACTOVEGIN (+14%) moved up to ranks eight and nine. The markets of the top ten leaders XARELTO (+30%) and ARBIDOL (+28%) as well as ELIQUIS (+43%) and HEPTRAL (+36%), which moved up to rank four and five, developed at an outstripping pace. PENTALGIN (+7%) also managed to move two ranks up, coming in at number seven. At the same time, due to reduction in sales the brands NUROFEN (-13%) and LOZAP (-8%) moved down to ranks six and ten, respectively. DETRALEX (+6%) maintained its previous rank three. The cumulative share of the top ten was 6.4%, in the year-earlier period it was 6.0%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	2	XARELTO	1.0	0.8
2	5	ARBIDOL	0.8	0.7
3	3	DETRALEX	0.7	0.7
4	8	ELIQUIS	0.7	0.5
5	7	HEPTRAL	0.7	0.5
6	4	NUROFEN	0.6	0.7
7	9	PENTALGIN	0.5	0.5
8	12	LORISTA	0.5	0.5
9	13	ACTOVEGIN	0.5	0.5
10	6	LOZAP	0.5	0.5
Total			6.4	6.0

The first three of the top ten INNs and group names held their own in the ranking. XYLOMETAZOLINE (+13%), DIOSMIN*HESPERIDIN (+10%) and PANCREATIN (+3%) held their previous top ranks (Table 3). The most dynamic among the leaders RIVAROXABAN (+30%) moved up to rank four from seven, displacing IBUPROFEN (+1%) one rank down. In addition to it, ROSUVASTATIN (+25%), UMIFENOVIR (+24%) and URSODEOXYCHOLIC ACID (+28%), which moved up to ranks six, seven and ten, also showed high growth rates and ranking progress. On top of that, the latter became the only newcomer of the top 10 ranking. NIMESULIDE (+11%), which held its own in the ranking, and BISOPROLOL (+3%), which moved down from rank six, were placed at ranks eight and nine. The cumulative share of the top 10 increased from 9.2% to 9.7%.

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

Rank in the top ten		INNs/Grouping Names	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	1	XYLOMETAZOLINE	1.3	1.3
2	2	DIOSMIN*HESPERIDIN	1.2	1.1
3	3	PANCREATIN	1.0	1.1
4	7	RIVAROXABAN	1.0	0.8
5	4	IBUPROFEN	1.0	1.0
6	9	ROSUVASTATIN	0.9	0.8
7	10	UMIFENOVIR	0.9	0.8
8	8	NIMESULIDE	0.8	0.8
9	6	BISOPROLOL	0.8	0.8
10	13	URSODEOXYCHOLIC ACID	0.8	0.7
Total			9.7	9.2

C09 Agents acting on the rennin-angiotensin system (+10%) and M01 Anti-inflammatory and antirheumatic products (+7%) held the top ranks in the top ten ATC-groups ranking (Table 4). Due to a 21% decrease in sales, the previous top three J05 Antivirals for systemic use moved down to rank six, which allowed the groups G03 Sex hormones (+7%), B01 Antithrombotic agents (+16%) and R01 Nasal preparations (+15%) to move one point up, coming in at ranks three through five respectively. In addition, the newcomers A11 Vitamins (+21%) and N06 Psychoanaleptics (+16%), which broke into the top ten ranking for the first time, moved up to the higher ranks. They displaced the group N02 Analgesics (+2%) to the last line of the top 10 ranking. J01 Antibacterials for systemic use (-2%) held its previous rank seven. In total, the top ten ATC-groups accumulated 36.1% of the regional market, whereas in the year-earlier period they accounted for 36.6%.

Table 4. The top ten ATC Groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020			6 mon. 2021	6 mon. 2020
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.4	5.3
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.0	5.0
3	4	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.1	4.1
4	5	B01	ANTITHROMBOTIC AGENTS	3.6	3.3
5	6	R01	NASAL PREPARATIONS	3.5	3.2
6	3	J05	ANTIVIRALS FOR SYSTEMIC USE	3.0	4.1
7	7	J01	ANTIBACTERIALS FOR SYST USE	2.9	3.2
8	12	A11	VITAMINS	2.9	2.6
9	11	N06	PSYCHOANALEPTICS	2.9	2.6
10	8	N02	ANALGESICS	2.8	3.0
Total				36.1	36.6

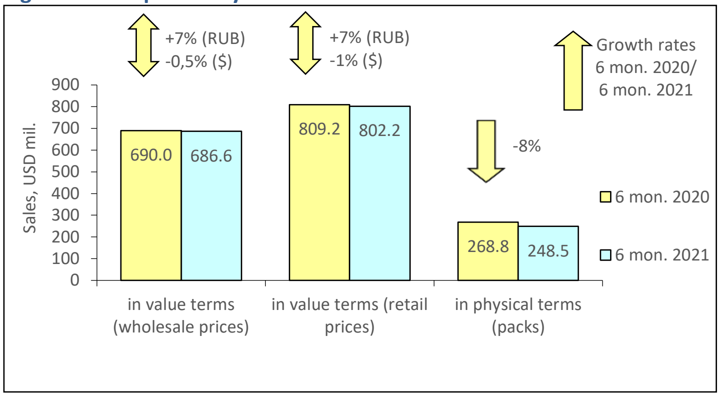
Conclusion. In January-June 2021, the pharmacy market of the Ural Federal District brought in RUB 46.613 bil. (USD 627.629 mil.) at retail prices. The regional sales increased by 8% in rouble terms and 1% in dollar terms. In pack terms the market showed negative growth rates (-5%) and achieved 173.353 mln packs. According to the results for six months of 2021, the average cost of an FPP pack in the district pharmacies was USD 3.62, which was higher than the last year figure (USD 3.42), and the national average (USD 3.59). The average expenses of the UFD residents for medications in the pharmacies were higher than the national average (USD 50.90 vs. USD 49.57).

SiFD PHARMACY MARKET: 2021 FIRST SIX 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-June 2021, the average salary in the SiFD was RUB 46848 (USD 630.69), which was 14% lower than the national average wage in Russia (RUB 54595).

According to the results of IQVIA Retail Audit of FPP drugs in Russian Federation™, in the first half of 2021 the SiFD pharmacy market volume in physical terms increased by 8% to 248.498 mil. packs (Fig. 1) In wholesale prices the sales increased by 7% in terms of roubles, but slightly reduced in terms of dollars, reaching RUB 50.977 bil. (USD 686.596 mil.), The district's share accounted for 11.1% of the total pharmacy sales in the Russian pharmacy market pattern. In January-June of 2021, the average cost of FPP in the SiFD pharmacies was USD 3.23, whereas in the year-earlier period its cost was USD 3.01. At the end of the first six months of 2021, average expenses of the SiFD residents for the purchase of FPPs in the pharmacies amounted to USD 47.18.

Figure 1. SiFD pharmacy market for six months 2020 – six months 2021



BAYER (+8%) held its leading positions in the top ten ranking in the retail market of the Siberia Federal District based on the results for January-June of 2021 (Table 1). STADA and OTCPHARM (+8% each) that showed the same growth rates moved up to ranks two and three, displacing SANOFI (+2%) to rank four. The market of ABBOTT (+11%), which moved up to rank eight from nine, developed at the fastest pace. At the same time, SANDOZ (-1%) lost one ranking point and moved down to rank nine. Positions of four manufacturers remained unchanged: SERVIER and TEVA (+3% each), KRKA (+5%) and GEDEON RICHTER (+4%) held ranks five through seven, and ten respectively. The total share of the top 10 manufacturers has reduced from 34.3% to 33.7%

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	1	**BAYER**	4.5	4.5
2	3	**STADA**	4.0	3.9
3	4	OTCPHARM	3.8	3.8
4	2	**SANOFI**	3.7	3.9
5	5	**SERVIER**	3.3	3.4
6	6	**TEVA**	3.2	3.3
7	7	**KRKA**	3.2	3.2
8	9	**ABBOTT**	2.8	2.7
9	8	**SANDOZ**	2.7	3.0
10	10	GEDEON RICHTER	2.5	2.6
Total			33.7	34.3

*AIPM members are in bold

The top ten leader XARELTO (+20%), as well as DETRALEX (+18%) and PENTALGIN (+3%), which held ranks four and six, held their own in the top ten brands ranking (Table 2). Four pharmaceutical manufacturers of the top 10 rose in the ranks. ELIQUIS (+59%) and MEXIDOL (+19%), which broke into the top 10 for the first time, moved up to ranks two and seven, while ARBIDOL (+40%) and CARDIOMAGNYL (+5%) moved up to ranks three and eight. In contrast, LORISTA, which showed zero growth rates, as well as LOZAP (-5%) and CONCOR (-4%), which reduced their sales, moved down to the lower positions. In total, the top ten manufacturers accumulated 7.2% of sales vs 6.7% in the year-earlier period.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	1	XARELTO	0.9	0.8
2	11	ELIQUIS	0.9	0.6
3	7	ARBIDOL	0.9	0.7
4	4	DETRALEX	0.8	0.7
5	2	LORISTA	0.7	0.7
6	6	PENTALGIN	0.6	0.7
7	12	MEXIDOL	0.6	0.6
8	10	CARDIOMAGNYL	0.6	0.6
9	5	LOZAP	0.6	0.7
10	8	CONCOR	0.6	0.7
Total			7.2	6.7

XYLOMETAZOLINE (+6%) continued to remain the leader of the top 10 INN and generic names ranking (Table 3). Some shifts took place in the lower part of the top ten manufacturers ranking, as a result of which four INNs rose in the ranks. The composition DIOSMIN*HESPERIDIN (+19%) and INN PANCREATIN (+20%) moved up two ranks, coming in at numbers two and six. The newcomers UMIFENOVIR (+35%) and APIXABAN (+59%) broke into the ranks of the top ten, moving up to ranks five and eight. At the same time, the less dynamic BISOPROLOL (+0.3%), IBUPROFEN (-0.1%), NIMESULIDE (+6%), LOSARTAN (+3%) and PANCREATIN (+7%) moved down to the lower ranks. The cumulative share of the top-ten increased by 0.4 p.p. and achieved 10.0%

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

Rank in the top ten		INNs/Grouping Names	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	1	XYLOMETAZOLINE	1.4	1.5
2	4	DIOSMIN*HESPERIDIN	1.1	1.0
3	2	BISOPROLOL	1.1	1.2
4	3	IBUPROFEN	1.0	1.1
5	11	UMIFENOVIR	1.0	0.8
6	8	RIVAROXABAN	0.9	0.8
7	6	NIMESULIDE	0.9	0.9
8	21	APIXABAN	0.9	0.6
9	5	LOSARTAN	0.9	0.9
10	7	PANCREATIN	0.8	0.8
Total			10.0	9.6

C09 Agents acting on the rennin-angiotensin system (+4%) and M01 Anti-inflammatory and antirheumatic products (+8%) and G03 Sex hormones (+12%) continued to be the best-selling groups on the regional market (Table 4). The groups B01 Antithrombotic agents (+16%) and R01 Nasal preparations (+12%) moved up to ranks four and five in terms of sales, displacing N02 Analgesics (-2%) two ranks down. J01 Antibacterials for systemic use moved up to rank seven from eighth despite a 2% decline in sales, while J05 Antivirals for systemic use (-12%), which used to hold that rank earlier, moved down one rank due to a more pronounced drop in sales. C05 Vasoprotectives (+9%) and R05 Cough and cold preparations (+4%) rounded out the top ten ranking. The share of the top ten ATC groups amounted to 36.7%, having decreased by 0.8 percentage points as compared to the previous year.

Table 4. The top ten ATC Groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020			6 mon. 2021	6 mon. 2020
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.6	5.7
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.2	5.1
3	3	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.2	4.0
4	6	B01	ANTITHROMBOTIC AGENTS	3.7	3.4
5	7	R01	NASAL PREPARATIONS	3.4	3.3
6	4	N02	ANALGESICS	3.3	3.6
7	8	J01	ANTIBACTERIALS FOR SYST USE	2.9	3.2
8	5	J05	ANTIVIRALS FOR SYSTEMIC USE	2.9	3.5
9	9	C05	VASOPROTECTIVES	2.9	2.8
10	10	R05	COUGH AND COLD PREPARATIONS	2.7	2.8
Total				36.7	37.5

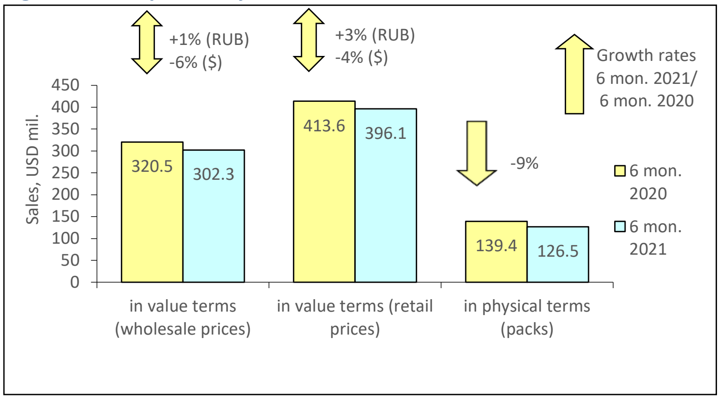
Conclusion. At the end of the first half of 2021, the pharmacy market in the Siberian Federal District was estimated at RUB 59.559 bil. (USD 802.191 mil.) at final consumer prices. At the same time, the market behaviour was positive in rouble (+7%) terms and negative in dollar (-1%) terms. In physical terms, the sales increased by 8% and amounted to 248.498 mil. packs. The average cost of an FPP pack increased as compared to a year earlier (USD 3.23 vs. USD 3.01) but continued to be lower than the national FPP price average in Russia (USD 3.59). Per capita expenses of the district residents for purchase of medicines in the pharmacies were also lower than the national average figures (USD 47.18 vs. USD 49.57).

FEFD PHARMACY MARKET: 2021 FIRST SIX 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-June of 2021 the average wage in FEFD was RUB 63330 (USD 852.58), which was 16% higher than the average wage in Russia (RUB 54595).

According to the results of IQVIA Retail Audit of Finished Pharma Products (FPP) in Russian Federation™ IQVIA, at the end of the first six months 2021 the sales of FPP drugs in physical terms in the pharmacies of FEFD saw a 9% decrease to 126.453 mil. packs. In money terms, the market expanded by 1% in terms of roubles and decrease by 6% in terms of dollars. At the same time, the volume of the market amounted to RUB 22.448 bil. (USD (302.262 mil.) at wholesale prices (Fig. 1). The district's share accounted for 5.5% of the all-Russia sales in retail prices. The average cost of a pack increased as compared to a year earlier period (USD 2.97) and was equal to USD 3.13. At the end of the first half of 2021, the average amount spent by the residents of the FEFD for FPPs in pharmacies amounted to USD 48.76.

Figure 1. FEFD pharmacy market for six months 2020 – six months 2021



Based on the results for the first six months of 2021, most of the top ten drug manufacturers in the retail FEFD market held their own in the ranking (Table 1). BAYER (+8%), STADA (+3%), OTCPHARM (+6%), KRKA (-3%) and SANOFI (-4%) held their previous top five ranks, while GLAXOSMITHKLINE (-4%) rounded out the top ten ranking. The manufacturers SERVIER (-0,3%) and GEDEON RICHTER (+0.1%) moved up one rank, coming in at numbers six and eight, respectively. At the same time, TEVA (-3%) and SANDOZ (-7%) moved one rank down, to numbers seven and nine, respectively. The aggregate share of the top-10 reduced from 35.2% to 34.8%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	1	**BAYER**	4.9	4.6
2	2	**STADA**	4.1	4.0
3	3	OTCPHARM	4.0	3.8
4	4	**KRKA**	3.4	3.6
5	5	**SANOFI**	3.3	3.5
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**	2.9	3.2
10	10	**GLAXOSMITHKLINE**	2.7	2.8
Total			34.8	35.2

*AIPM members are in bold

In the top ten brands ranking, only NUROFEN (-7%) placed at rank three managed to hold its own (Table 2). Six brand names of the top 10 rose in the ranks. ARBIDOL (+55%) moved up to rank one from two. XARELTO (+33%) and CARDIOMAGNYL (+2%) moved two ranks up, to numbers two and seven, whereas DETRALEX (+19%) moved up to rank five from ten. Two newcomers, ELIQUIS (2.0-fold growth in sales) and MEXIDOL (+4%), moved up to ranks four and ten, respectively. At the same time, LORISTA (-2%), CONCOR (-6%) and THERAFLU (-13%) lost one rating position each. The aggregate share of the top-10 expended from 6.9% to 7.8%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	2	ARBIDOL	1.3	0.9
2	4	XARELTO	1.1	0.8
3	3	NUROFEN	0.8	0.8
4	27	ELIQUIS	0.8	0.4
5	10	DETRALEX	0.7	0.6
6	5	LORISTA	0.7	0.7
7	9	CARDIOMAGNYL	0.7	0.7
8	6	CONCOR	0.6	0.7
9	7	THERAFLU	0.6	0.7
10	11	MEXIDOL	0.6	0.6
Total			7.8	6.9

Despite the change of leader in the prior ranking, XYLOMETAZOLINE (-4%) held its previous rank number one in the top ten INN and group names rating (Table 3). UMIFENOVIR (+51%) moved up to rank two from five, displacing IBUPROFEN (-3%) down to rank three. RIVAROXABAN (+33%), DIOSMIN*HESPERIDIN (+16%) and APIXABAN (2.0-fold increase in sales), which moved up to ranks four, six and ten, respectively also demonstrated outpacing growth rates. Note that the latter became the only newcomer of the top-10 ranking. In contrast, BISOPROLOL and NIMESULIDE (-2% each) moved down to the lower ranks five and eight. As before, INNs PANCREATIN (+0,2%) and DICLOFENAC (-5%) were placed at ranks seven and nine. The total share of the top 10 INNs expanded by 1.0 p.p. and accounted for 10.8%

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

Rank in the top ten		INNs/Grouping Names	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	1	XYLOMETAZOLINE	1.7	1.8
2	5	UMIFENOVIR	1.4	0.9
3	2	IBUPROFEN	1.2	1.3
4	10	RIVAROXABAN	1.1	0.8
5	4	BISOPROLOL	1.0	1.1
6	8	DIOSMIN*HESPERIDIN	1.0	0.9
7	7	PANCREATIN	0.9	0.9
8	6	NIMESULIDE	0.9	0.9
9	9	DICLOFENAC	0.8	0.8
10	44	APIXABAN	0.8	0.4
Total			10.8	9.8

Only the leading groups C09 Agents acting on the rennin-angiotensin system (-2%) and M01 Anti-inflammatory and antirheumatic products (+1%) held their own in the top ten ATC groups ranking (Table 4). G03 Sex hormones (+3%), Group R01 Nasal preparations (+2%) and B01 Antithrombotic (+22%) moved up to ranks three through five from the lower ones. A11 Vitamins (+5%) and C05 Vasoprotectives (+8%), which rounded out the top ten ranking, also rose in the ranks. Due to reduction in sales, J05 Antivirals for systemic use (-18%), J01 Antibacterials for systemic use (-6%) and N02 Analgesics (-8%) also downgraded their ranking positions, dropping to ranks six through eight, respectively. The total share of the analysed ranking accounted for 36.7% against 37.3% in a year-earlier period.

Table 4. The top ten ATC Groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020			6 mon. 2021	6 mon. 2020
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.0	5.2
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.9	4.9
3	4	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.8	3.8
4	5	R01	NASAL PREPARATIONS	3.7	3.7
5	8	B01	ANTITHROMBOTIC AGENTS	3.7	3.1
6	3	J05	ANTIVIRALS FOR SYSTEMIC USE	3.6	4.4
7	6	J01	ANTIBACTERIALS FOR SYST USE	3.3	3.6
8	7	N02	ANALGESICS	3.1	3.4
9	10	A11	VITAMINS	2.7	2.7
10	13	C05	VASOPROTECTIVES	2.7	2.6
Total				36.7	37.3

Conclusion. In January-June 2021, the pharmacy market of the Far Eastern Federal District brought in RUB 29.418 bil. (USD 396.101 mil.), which was 3% more in terms of roubles and 4% less in terms of dollars than in the same period of 2020. In physical terms, the market reduced (-9%) and amounted to 126.453 mil. packs. In the first half of 2021, the average cost of an FPP pack in the city pharmacies was USD 3.13, which was higher than in the year-earlier period (USD 2.97), but lower than the national average (USD 3.59). The average drug expenses of the district residents were also lower than the national average expenses in Russia (48.76 USD vs. 49.57 USD).