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

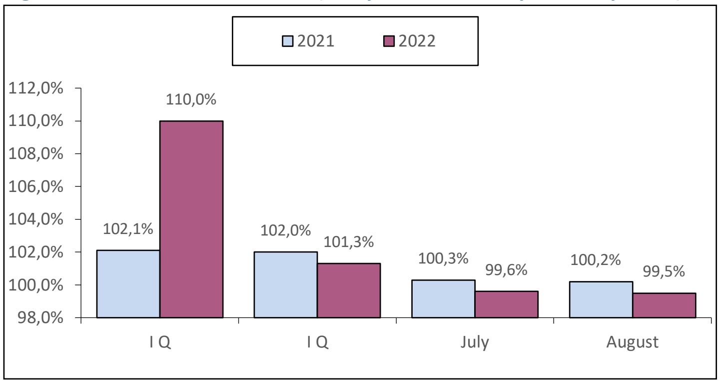
MACROECONOMIC INDICES

Inflation

According to Federal State Statistics Service's data, the Consumer Price Index was estimated as 99.5% in August 2022 compared to the previous month, 110.4% compared to December 2021.

In August 2022, the Producer Price Index for industrial production was 99.0% as compared to the previous month, in the month-earlier period it had amounted to 97.8%. The index accounted for 101.3% against December of 2021.

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



Living standard

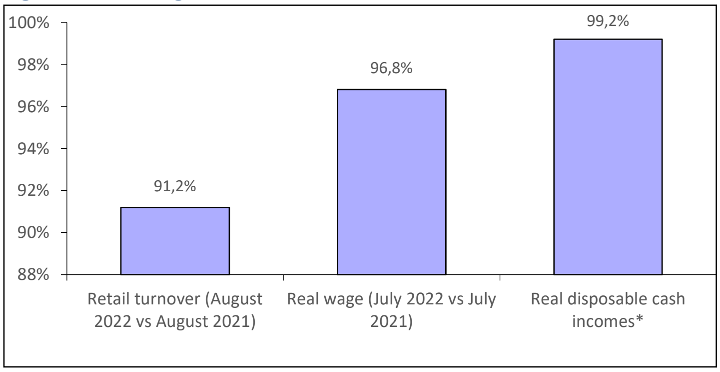
In July 2022, a gross monthly average wage of corporate employees reached RUB 62200 (USD 1070.94). It accounted for 111.4% compared to July 2021, and 93.1% compared to the previous period. In July 2022, the real gross wage accounted for 96.8% as compared to July 2021, and 93.5% against the prior period.

According to estimates[1], real disposable cash incomes decreased by 99.2% in the first half of 2022 as compared to the first half of 2021 (Fig. 2).

Retail turnover

In August 2022, the retail turnover was equal to RUB 3640.5 bil. or 91.2% (in comparable prices) against the respective period of the previous year, and RUB 27653.1 bil. or 95.1% in January - August 2022 (Fig. 2).

Figure 2. Real wage and retail turnover



* First half of 2022 vs first half of 2021

Industrial Production

According to Federal State Statistics Service's data, in August 2022 Industrial Production Index accounted for 99.9% compared to the same period of the previous year, and 100.9% in January-August 2022.

According to Federal State Statistics Service's data, Industrial Production Index for drugs and medical products accounted for 114.3% in August 2022 compared to the same period of 2021, and 122.7% in January-August 2022 relative to January-August 2021.

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

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 2022

Rank in the top ten	Manufacturer	RUB mil.
1	Biocad	2993.1
2	Otcpharm	2800.7
3	Stada	2540.8
4	Binnopharm	2539.2
5	Generium	2524.7
6	Pharmstandart	2009.0
7	Servier	1879.7
8	Microgen	1678.8
9	Valenta	1604.6
10	Pharmasyntez	1566.6

Source: IQVIA

Table 2 provides pharmacy sales data from 10 regions of the Russian Federation. In July 2022 compared to June 2022, reduction in sales (in terms of roubles) was observed almost in all regions. The most pronounced growth in sales was observed in St. Petersburg (-21%), the least one in Tatarstan (-2%). The sales grew in Krasnodar Krai (+6%) and Perm (+1%).

Table 2. Pharmacy sales in the regions, 2022

Region	Pharmacy sales, $ mil. (wholesale prices)			Growth gain, % (roubles)		
	May 2022	June 2022	July 2022	May/ April 22	June/ May 22	July/ June 22
Moscow	168.7	212.3	177.5	-7%	11%	-15%
St. Petersburg	84.3	99.9	77.7	1%	5%	-21%
Krasnodar Krai	46.2	69.8	72.8	-8%	34%	6%
Krasnoyarsk Krai	26.6	32.7	30.0	-5%	9%	-7%
Tatarstan	27.1	31.5	30.4	-1%	3%	-2%
Rostov Region	27.8	35.0	33.5	-0.2%	11%	-3%
Novosibirsk Region	26.0	33.6	28.5	-6%	14%	-14%
Voronezh Region	18.0	23.2	21.4	4%	14%	-6%
Perm	9.7	10.1	10.1	-11%	-7%	1%
Tyumen	10.2	12.1	11.4	-2%	6%	-4%

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 2022

Rank in the top ten	Company*	Quantity of broadcasts
1	Otcpharm	9,305
2	Dr. Reddy's Laboratories	7,657
3	Stada	4,194
4	Petrovax	3,058
5	Polisorb	2,748

Source - Remedium according to Mediascope's data

Table 4. Top five brand names in mass media in August 2022

Rank in the top ten	Brand*	Quantity of broadcasts
1	Pentalgin	3,807
2	Polisorb	2,748
3	Evalar	2,592
4	Trekrezan	2,276
5	Arbidol	2,115

Source - Remedium according to Mediascope's data

* Only drugs registered with National Medicine Register were considered.

STATE REIMBURSEMENT PROGRAM (DLO) IN THE RUSSIAN FEDERATION: 2022 FIRST SIX MONTHS RESULTS

According to DLO in RF™, the drug supplies under the Federal Program amounted to RUB 85,691 bil. based on the results for the first six months of 2022. (USD 1.146 bil.) at contractual prices. The sector volume expanded by 6% in terms of roubles and 5% in terms of dollars as compared to the same period of 2021. The scope of supplies in pack terms increased by 6% to 45.509 mil. packs. The average cost of a FPP pack through the DLO program was USD 25.18 in contractual prices (a year ago it was USD 25.34).

Based on the results for the first half of 2022, the top 10 manufacturers ranking changed its leader: TAKEDA (+6%[2]) moved up to rank number one from two (Table 1). Due to 2-fold growth in purchases, ROCHE moved up to rank two from six, whereas the former leader GENERIUM, in contrast, reduced its purchases by 14% and moved up no higher than rank three. They were followed by CELGENE (+1%), JOHNSON & JOHNSON (+18%) and BIOCAD (+21%), which moved one rank down, and by NOVARTIS (+6%), which held its previous rank seven. In addition to the above leaders, SANOFI (+1%) and NOVO NORDISK (-2%) managed to improve their positions by one rank. On top of that, OCTAPHARMA (-35%) moved down to rank ten. The total share of the top ten drug manufacturers under DLO Program extended by 2 p.p. and accounted for 63.3%.

Table 1. The top 10 drug manufacturers for DLO*

Rank in the top ten		Manufacturer*	Share in total DLO volume, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	2	**TAKEDA**	10.4	10.3
2	6	**ROCHE**	8.9	4.6
3	1	GENERIUM ZAO RF	8.8	10.8
4	3	**CELGENE**	8.1	8.5
5	4	**JOHNSON & JOHNSON**	7.6	6.8
6	5	BIOCAD RF	7.0	6.1
7	7	**NOVARTIS**	4.5	4.5
8	9	**SANOFI**	3.3	3.5
9	10	**NOVO NORDISK**	2.5	2.7
10	8	OCTAPHARMA	2.2	3.5
Total			63.3	61.3

*AIPM members are in bold

Two newcomers broke into the top ten brands ranking (Table 2). They were TEBERIF (4.8-fold growth in purchases) and HEMLIBRA (2.5-fold growth) which moved up to ranks four and six. The markets of the other five brands developed at a fast pace: Purchases of INN OCREVUS grew by 2.6 times, those of ELIZARIA, DARZALEX and TYSABRI by 24%, whereas PLEGRIDY saw a 13% growth. On top of that, the former three moved up to ranks two, five and seven, and the latter held their two previous bottom ranks. REVLIMIDE (+2%) and ELAPRASE (+5%) continued to hold their previous ranks number one and three. And only ADVATE (-21%) that showed pronounced negative growth rates moved four ranks down, coming in at number eight. The total share of the top 10 ranking grew from 27.3% to 34.5%.

Table 2. The top 10 Brands in DLO segment

Rank in the top ten		Brand	Share in total DLO volume, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	1	REVLIMIDE	8.1	8.4
2	7	OCREVUS	5.2	2.1
3	3	ELAPRASE	3.4	3.4
4	31	TEBERIF	3.3	0.7
5	6	ELIZARIA	3.2	2.7
6	25	HEMLIBRA	2.6	1.1
7	8	DARZALEX	2.4	2.0
8	4	ADVATE	2.3	3.1
9	9	TYSABRI	2.2	1.8
10	10	PLEGRIDY	2.0	1.8
Total			34.5	27.3

Just as the corresponding brand, LENALIDOMIDE (+2%) continued to hold rank number one in the top 10 INN and group names ranking (Table 3). Some shifts took place in the lower part of the top ten ranking, with the result that seven INNs rose in the ranks. OCRELIZUMAB (2.6-fold growth in purchases), INTERFERON BETA-1A (+82%), IDURSULFASE (+5%) and ECULIZUMAB (+24%) moved up to ranks two through five, respectively. DARATUMUMAB (+24) moved two ranks up, coming in at number eight, and the newcomers of the top ten EMICIZUMAB (2.5-fold growth) and NATALIZUMAB (+25%) moved up to ranks seven and ten. In contrast, FACTOR VIII (-31%) and OCTOCOG ALFA (-21%) reduced their purchases and moved down to the lower ranks. The cumulative share of the top-ten increased by 5 p.p. and achieved 36.6%.

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

Rank in the top ten		INN/Grouping name	Share in total DLO volume, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	1	LENALIDOMIDE	8.1%	8.4%
2	9	OCRELIZUMAB	5.2	2.1
3	7	INTERFERON BETA-1A	4.7	2.7
4	5	IDURSULFASE	3.4	3.4
5	8	ECULIZUMAB	3.2	2.7
6	3	FACTOR VIII	2.7	4.1
7	24	EMICIZUMAB	2.6	1.1
8	10	DARATUMUMAB	2.4	2.0
9	6	OCTOCOG ALFA	2.3	3.1
10	13	NATALIZUMAB	2.2	1.8
Total			36.6	31.5

Five of the top-10 ATC groups held their own in the top ten ranking (Table 4). They were L04 Immunosuppressants (+21%), B02 Antihemorrhagics (-13%), L01 Antineoplastic agents (-10%), B01 Antithrombotic agents (+25%) and R03 Drugs for obstructive airway diseases (+2%) placed at the top three ranks, as well as rank seven and eight. L03 Immunostimulants (+40%) that showed high growth rates moved up from rank six to four, displacing A10 Drugs used in diabetes (-3%) and A16 Other alimentary tract and metabolism products (0%) one rank down. The newcomer L02 Endocrine therapy (+15%) moved up to rank ten in the top ten ranking, displacing B03 Anti-anaemic preparations (-19%) one rank down. The total share of the top 10 reduced from 88.3% to 87.9%.

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. 2022	6 mon. 2021			6 mon. 2022	6 mon. 2021
1	1	L04	IMMUNOSUPPRESSANTS	29.2	25.6
2	2	B02	ANTIHEMORRHAGICS	16.2	19.8
3	3	L01	ANTINEOPLASTIC AGENTS	10.2	12.0
4	6	L03	IMMUNOSTIMULANTS	9.1	6.8
5	4	A10	DRUGS USED IN DIABETES	7.7	8.4
6	5	A16	OTHER ALIMENTARY TRACT AND METABOLISM PRODUCTS	7.4	7.8
7	7	B01	ANTITHROMBOTIC AGENTS	3.2	2.7
8	8	R03	DRUGS FOR OBSTRUCTIVE AIRWAY DISEASES	2.2	2.3
9	11	L02	ENDOCRINE THERAPY	1.5	1.3
10	9	B03	ANTIANEMIC PREPARATIONS	1.3	1.6
Total				87.9	88.3

Data on supplies to the top ten regions of Russia under State Reimbursement Program (DLO) are shown in Table 5. Moscow (+16%) and Moscow Region (+11%) kept and reinforced their top two ranks. They were followed by Sverdlovsk Region (+2%), Tatarstan (+20%) and St. Petersburg (+21%). Note that purchases in three (Krasnodar Region, Chelyabinsk region and Bashkortostan) from 10 top regions reduced as compared to the same period of the last year. The cumulative share of the top 10 regions expanded from 37.3% to 37.7%.

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

Rank in the top ten		Region	Share in total DLO volume, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	1	Moscow	9.2	8.4
2	2	Moscow Region	5.0	4.7
3	4	Sverdlovsk Region	3.5	3.7
4	5	Tatarstan Republic	3.5	3.1
5	7	Saint Petersburg	3.4	3.0
6	3	Krasnodar Region	3.1	3.8
7	8	Rostov Region	2.7	2.8
8	11	Chelyabinsk Region	2.5	2.3
9	6	Novosibirsk Region	2.4	3.0
10	9	Bashkortostan Republic	2.4	2.6
Total			37.7	37.3

Conclusion. Based on the results for the first six months of 2022, the DLO sector brought in RUB 85.691 bil. (USD 1.146 bil.) at contractual prices, which is by 6% in terms of roubles and by 5% in terms of dollars more than in January-June of 2021. In pack terms, the supplies under the program increased by 6% to 45.509 mil. packs. The average cost of FPP included in the DLO Programme decreased as compared to the previous year (USD 25.18 vs USD 25.34).

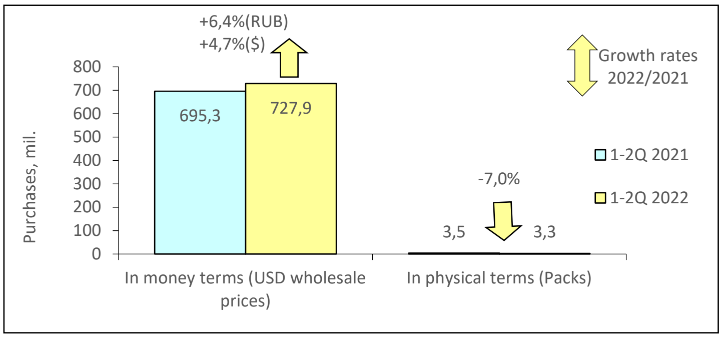
[2]Hereinafter, unless otherwise stated, growth gains are stated in the rouble equivalent or national currency.

* Here and elsewhere, we shall use IQVIA's data

COST DEMANDING NOSOLOGIES (VZN) PROGRAM, 1-2 Q, 2022

According to IQVIA, at the end of the first half of 2022 the volume of supplies under the VZN program in contract prices amounted to RUB 55.1 bil. (USD 727.9 mil.) (Fig. 1). The purchases saw a 6.4% decrease in terms of national currency and a 4.7% increase in terms of dollars as compared to the same period of the previous year. In natural terms, the supplies decreased by 7.0% to 3.3 mil. packs. In 2022, the VZN procurement nomenclature was updated to include four INNs: Ixazomib и Pomalidomide for the treatment of patients with multiple myeloma, Efmoroctocog Alfa for the treatment of haemophilia A (a hereditary clotting disorder due to factor VIII deficiency), as well as Cladribine that is indicated for relapsing forms of multiple sclerosis (in 1-2 quarter of 2022 the purchases of these INNs accounted for 3.6% of the total volume of VZN programme).

Figure 1. Purchases trend under the VZN Program in 1-2 Q, 2022 relative to 1-2 Q, 2021.*



Compared to 1-2 Q 2021, the groups of drugs for the treatment of pituitary dwarfism (+55%), multiple sclerosis (+57%) and haemolytic-uremic syndrome (+22%) showed the largest increase in purchases in terms of roubles. A negative increase in purchases was recorded in the groups of drugs for the treatment of haemophilia (-13%), oncohematological drugs (-6%) and systemic-onset juvenile arthritis (-3%). In the first half of 2022, the group of drugs to treat multiple sclerosis continued as the leader in the purchases rating, the drugs to treat haemophilia and oncohematological drugs moved to ranks two and three, respectively.

Table 1. Supplies pattern under the VZN Program

Nosologies	INN	Share in total VZN supplies (RUB), %	
		1-2Q 2022	1-2Q 2021
Sclerosis Multiplex		**29.6**	**20.0**
	OCRELIZUMAB	8.1	3.4
	INTERFERON BETA-1A	7.2	4.2
	NATALIZUMAB	3.4	2.9
	PEGINTERFERON BETA-1A	3.0	2.8
	INTERFERON BETA-1B	2.3	1.9
	TERIFLUNOMIDE	2.1	2.3
	GLATIRAMER ACETATE	1.3	1.6
	CLADRIBINE	1.2	0.0
	ALEMTUZUMAB	0.8	1.0
Haemophilia		**24.9**	**30.6**
	FACTOR VIII	4.2	6.4
	EMICIZUMAB	4.0	1.7
	OCTOCOG ALFA	3.6	4.9
	MOROCTOCOG ALFA	2.9	5.9
	FACTOR VIII*FACTOR VON WILLEBRAND	2.4	3.9
	FACTOR VIII INHIBITOR BYPASSING FRACTION	2.2	2.1
	EPTACOG ALFA (ACTIVATED)	2.0	2.9
	FACTOR IX	1.7	1.9
	EFMOROCTOCOG ALFA	0.8	0.0
	SIMOCTOCOG ALFA	0.7	0.4
	NONACOG ALFA	0.5	0.6
Oncohematology		**21.9**	**24.9**
	LENALIDOMIDE	12.6	13.2
	DARATUMUMAB	3.7	3.1
	RITUXIMAB	2.9	6.9
	IXAZOMIB	0.9	0.0
	POMALIDOMIDE	0.7	0.0
	BORTEZOMIB	0.7	1.0
	IMATINIB	0.4	0.4
	FLUDARABINE	0.1	0.2
Mucopolysaccharidosis type I, II and VI		**9.1**	**9.9**
	IDURSULFASE	5.2	5.3
	GALSULFASE	2.1	2.6
	LARONIDASE	1.1	1.1
	IDURSULFASE BETA	0.7	0.9
Hemolytic-uremic syndrome		**4.9**	**4.2**
	ECULIZUMAB	4.9	4.2
Transplantation		**3.4**	**4.0**
	TACROLIMUS	2.1	2.5
	MYCOPHENOLIC ACID	0.7	0.8
	EVEROLIMUS	0.4	0.4
	CICLOSPORIN	0.2	0.2
	MYCOPHENOLATE MOFETIL	0.1	0.1
Systemic-onset juvenile arthritis.		**2.8**	**3.1**
	CANAKINUMAB	2.2	2.5
	TOCILIZUMAB	0.5	0.5
	ETANERCEPT	0.0	0.0
	ADALIMUMAB	0.0	0.0
Gaucher disease		**1.8**	**1.8**
	VELAGLUCERASE ALFA	0.9	0.8
	IMIGLUCERASE	0.9	1.0
	TALIGLUCERASE ALFA	0.0	0.0
Mucoviscidosis		**1.3**	**1.4**
	DORNASE ALFA	1.3	1.4
Pituitary dwarfism		**0.2**	**0.2**
	SOMATROPIN	0.2	0.2

Takeda moved up to rank number one in the top ten manufacturers ranking. The most significant positive contribution to the procurement trend in the 1st quarter was made by Elaprase for the treatment of mucopolysaccharidosis II (+5%), which held its previous rank three in the top ten brands ranking. Another best-seller of the company, recombinant blood factor VIII Advate, moved from rank 4 to 8 in the ranking due to a 21% decrease in purchases. Generium moved to rank two from the leading position in the top ten companies ranking (Table 3). Purchases of drugs manufactured by Generium decreased by 14% compared to 1-2 Q 2021. The decrease in purchases was provided primarily by 47% increase in purchases of Octofactor, a recombinant blood factor VIII, and by 29% increase in purchases of Coagil-VII for the treatment of haemophilia. Roche moved up to rank three in the ranking, due to two of its drugs included in the VZN nomenclature in 2021. Ocrevus (Ocrelizumab) for the treatment of multiple sclerosis, and Hemlibra (Emicizumab) for the treatment of haemophilia A. The drugs moved up to ranks 2 and 6 in the top ten brands ranking, respectively. Celgene moved to rank four (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 13.2% to 12.6%.

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 2022	1-2Q 2021		1-2Q 2022	1-2Q 2021
1	1	REVLIMID	12.6	13.2
2	7	OCREVUS	8.1	3.4
3	3	ELAPRASE	5.2	5.3
4	27	TEBERIF	5.1	1.1
5	6	ELIZARIA	4.9	4.2
6	23	HEMLIBRA	4.0	1.7
7	8	DARZALEX	3.7	3.1
8	4	ADVATE	3.6	4.9
9	9	TYSABRI	3.4	2.9
10	10	PLEGRIDY	3.0	2.8
Total			53.6	50.2

J&J moved down to rank five in the top ten ranking though its sales increased by 24%. Tysabri, J&J's drug to treat multiple sclerosis, and a new drug, Plegridy (Peginterferon beta-1a), accounted for 74% of the company's total sales. Both drugs held their ranks (9 and 10, respectively) in the top ten brands ranking. Biocad moved up to rank six in the top ten manufacturers ranking. Purchases of a drug to treat multiple sclerosis Teberif (Interferon beta-1a) increased by 3 times compared with the first half of 2021, which allowed the drug to move up to rank four from 27 in the top ten brands ranking (Table 2).

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

Rank in the top ten		Manufacturer*	Share in total VZN supplies, %	
1-2Q 2022	1-2Q 2021		1-2Q 2022	1-2Q 2021
1	2	**TAKEDA**	15.9	15.9
2	1	GENERIUM ZAO RF	13.7	16.9
3	6	**ROCHE**	12.9	5.9
4	3	CELGENE	12.6	13.2
5	4	**JOHNSON & JOHNSON**	10.1	8.8
6	5	BIOCAD RF	9.5	8.1
7	7	OCTAPHARMA	3.4	5.3
8	9	**NOVARTIS**	2.6	2.8
9	10	**BIOMARIN IRELAND**	2.1	2.6
10	15	VALENTA	2.0	1.7
Total			84.7	82.5

*AIPM members are in bold

Conclusion: in total, in VZN segment the purchases of Russian-manufactured drugs in physical terms decreased by 1% both in physical and value terms, and those of foreign manufacture increased by 11.5% in physical terms and reduced by 2% in value terms. The share of Russian drugs in the VZN segment pattern markedly increased in terms of packs from 46% to 49%. In terms of roubles, the share reduced from 31% to 29%. The share of localized products (localization of the FFP stage) increased from 44% to 49% (in value terms).

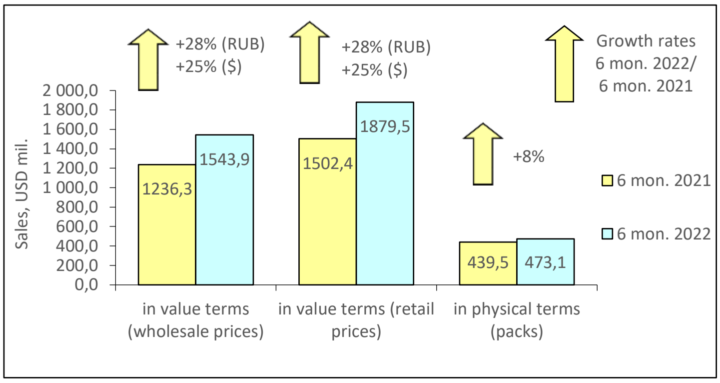
* Here and elsewhere IQVIA's data are used

CFD PHARMACY MARKET (WITHOUT MOSCOW): 2022 FIRST SIX MONTHS RESULTS

According to Federal State Statistics Service, as of January 1, 2022, estimated population of the Central Federal District (CFD) (without Moscow) was 26.469 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 the first half of 2022 the average wage in the CFD (inclusive of Moscow) was RUB 79252 (USD 1041.56), which was 28% higher than the average wage in Russia (RUB 61961).

According to the results of the Retail Audit of Finished Pharma Products (FPP) in Russian Federation™, in January-June of 2022, the volume of drugs in physical terms in the CFD (excl. of Moscow) continued to show positive growth rates (+8%) and totalled to 473.116 mil. packs. In money terms, the market increased by 28% in terms of roubles and 25% in terms of dollars. At the same time, the volume reached RUB 117.285 bil. (USD 1.544 bil.) at wholesale prices (Fig.1). The region market share accounted for 21% of the Russian pharmacy retail sales. The average cost of a pack increased as compared to 2021 and was equal to USD 3.97 against USD 3.42 at retail prices. At the end of the first six months of 2022, the average amount spent by the residents of the region for the drugs in pharmacies amounted to USD 71.01.

Figure 1. The CFD (without Moscow) pharmacy market for 6 months of 2021 – 6 months 2022*



BAYER (+20%) and STADA (+35%) continued to demonstrate the largest sales volumes in the market of the Central Federal District (excluding Moscow) following the results of 2022 (Table 1). KRKA (+30%), TEVA (+15%), BERLIN-CHEMIE/MENARINI (+24%), GLAXOSMITHKLINE (+25%) and ABBOTT (+22%) held their previous ranks six through ten, respectively. The only shift affected ranks from three through five. SANOFI (+13%) that showed relatively low growth rates, moved two ranks down, giving way to OTCPHARM and SERVIER (+30% each). The cumulative share of the top ten reduced by 1 p.p. and accounted for 34.3%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	1	**BAYER**	5.0	5.3
2	2	**STADA**	4.1	3.9
3	4	OTCPHARM	3.7	3.6
4	5	**SERVIER**	3.5	3.4
5	3	**SANOFI**	3.4	3.9
6	6	**KRKA**	3.4	3.3
7	7	**TEVA**	2.9	3.3
8	8	**BERLIN-CHEMIE/MENARINI**	2.8	2.9
9	9	**GLAXOSMITHKLINE**	2.8	2.9
10	10	**ABBOTT**	2.6	2.8
Total			34.3	35.3

*AIPM members are in bold

XARELTO (+10%) and ELIQUIS (+46%) held their previous first ranks in the top ten brands ranking (Table 2). The most dynamic among the top ten brands ARBIDOL (+76%) moved up to rank three from six by forcing DETRALEX (+76%) and MEXIDOL (+21%) to move down one rank. The newcomer INGAVIRIN (+51%) broke into the top ten ranking for the first time, coming in at rank six. The brands CONCOR (+124%) and PENTALGIN (+14%), which showed low growth rates, in contrast, moved down to the lower ranks, seven and ten, respectively. NUROFEN (+31%) and CARDIOMAGNYL (+26%) continued to hold their previous ranks eight and nine. The total share of the top 10 brands didn't change and accounted for 8.7%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	1	XARELTO	1.5	1.8
2	2	ELIQUIS	1.3	1.2
3	6	ARBIDOL	1.1	0.8
4	3	DETRALEX	0.8	0.8
5	4	MEXIDOL	0.7	0.8
6	11	INGAVIRIN	0.7	0.6
7	5	CONCOR	0.7	0.8
8	8	NUROFEN	0.7	0.7
9	9	CARDIOMAGNYL	0.6	0.7
10	7	PENTALGIN	0.6	0.7
Total			8.7	8.7

* Here and elsewhere IQVIA's data are used

The top INN and generic names ranking leader changed (Table 3). XYLOMETAZOLINE (+26%) moved up to rank one from two, displacing RIVAROXABAN (+10%) to rank two. APIXABAN (+46%) moved up to rank three from five, displacing DIOSMIN*HESPERIDIN (+29%) down one rank. The newcomers UMIFENOVIR (+79%) and ROSUVASTATIN (+45%) broke into the ranks of the top ten, moving up to ranks five and nine. NIMESULIDE (+36%) held its previous rank six, whereas the other three brands fell in the ranks. BISOPROLOL (+14%), IBUPROFEN (+33%) and PANCREATIN (+18%) moved down to ranks seven, eight and ten, respectively. The cumulative share of the top 10 increased from 11.7% to 11.9%.

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

Rank in the top ten		INN/Grouping name	Share in total pharmacy sales, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	2	XYLOMETAZOLINE	1.6	1.6
2	1	RIVAROXABAN	1.5	1.8
3	5	APIXABAN	1.3	1.2
4	3	DIOSMIN*HESPERIDIN	1.3	1.3
5	11	UMIFENOVIR	1.1	0.8
6	6	NIMESULIDE	1.1	1.0
7	4	BISOPROLOL	1.1	1.2
8	7	IBUPROFEN	1.0	1.0
9	12	ROSUVASTATIN	0.9	0.8
10	8	PANCREATIN	0.9	1.0
Total			11.9	11.7

Group C09 Agents acting on the rennin-angiotensin system (+29%) remained the leader of the top ten ATC groups (Table 4). Based on the results for half a year, M01 Anti-inflammatory and antirheumatic products (+33%) were ranked second, displacing B01 Antithrombotic agents (+20%) from that position down one rank. Another three groups rose in the ranks. J05 Antivirals for systemic use (+66%) moved up to rank four from nine, N06 Psychoanaleptics (+29%) from rank ten to nine, and the newcomers R05 Cough and cold preparations (+37%) rounded out the top ten ranking. At the same time, despite the outperformance rates R01 Nasal preparations (+31%) and G03 Sex hormones (+44%) lost one rank each and the less dynamic C05 Vasoprotectives (+22%) moved down from rank six to eight. N02 Analgesics (+30%) held their previous rank seven. In total, the top ten ATC groups accumulated 39.0% of the regional market, which was 1.5 p.p. more than the year-earlier period indicator (37.5%).

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. 2022	6 mon. 2021			6 mon. 2022	6 mon. 2021
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	6.0	5.9
2	3	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.2	5.0
3	2	B01	ANTITHROMBOTIC AGENTS	4.9	5.3
4	9	J05	ANTIVIRALS FOR SYSTEMIC USE	3.8	2.9
5	4	R01	NASAL PREPARATIONS	3.7	3.6
6	5	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.6	3.2
7	7	N02	ANALGESICS	3.1	3.1
8	6	C05	VASOPROTECTIVES	3.0	3.2
9	10	N06	PSYCHOANALEPTICS	2.9	2.9
10	13	R05	COUGH AND COLD PREPARATIONS	2.6	2.4
Total				39.0	37.5

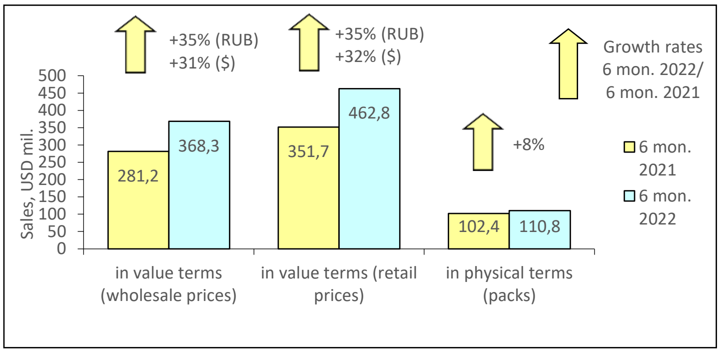
Conclusion. In January-June of 2022, the retail pharmacy market of CFD (exclusive of Moscow) brought in RUB 142.654 bil. (USD 1.879 bil). which was 28% in terms of roubles and 25% in terms of dollars more than in the same period of 2021. In pack terms, the market also showed positive growth rates (+8%) and achieved 473.116 mil. packs. In the first half of 2022, the average cost of an FPP pack in the regional pharmacies was USD 3.97, which was higher than the last year figure (USD 3.42), and less than the national average (USD 4.15). The average medicine expenses of the region residents were also lower than the national average expenses in Russia (USD 71.01 vs. USD 62.09).

NWFD (EXCLUSIVE OF SAINT PETERSBURG) PHARMACY MARKET: 2022 FIRST SIX MONTHS RESULTS

According to Federal State Statistics Service, as of January 1, 2022, estimated population of the North-Western Federal District (NWFD) (exclusive of St. Petersburg) was 8.524 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 the first half of 2022 the average wage in the NWFD (without St. Petersburg) was RUB 69331 (USD 911.17), which was 12% higher than the average wage in Russia (RUB 61961).

According to the results of the Retail Audit of Finished Pharmaceutical Products (FPP) in the Russian Federation™, at the first half of 2022 the sales of drugs in physical terms in the NWFD (without St. Petersburg) saw positive growth rates (+8%) and amounted to 110.767 mil. packs. In money terms, the market increased by 35% in terms of roubles and 31% in terms of dollars. At the same time, the volume of the market amounted to RUB 28.188 bil. (USD (368.310 mil.) at wholesale prices (Fig. 1). The share of the region accounted for 5.2% of the Russian retail pharmacy sales. The average cost of an OTC pack in the pharmacies increased: USD 4.18 vs USD 3.14 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 of 2022 amounted to USD 54.29.

Figure 1. The NWFD (without St. Petersburg) pharmacy market for 6 months of 2021 – 6 months 2022.*



At the end of January-June of 2022, the top four manufacturers on the pharmacy market of the North-Western Federal District (NWFD) (excl. of St. Petersburg) held its own in the ranking (Table 1). As before, it includes BAYER (+31%), OTCPHARM (+41%), SERVIER and STADA (+40% in both). In addition, TEVA (+36%) and GEDEON RICHTER (+22%) also held their previous ranks seven and eight. Three manufacturers from the top ten ranking managed to rise in the ranks: KRKA (+30%), GLAXOSMITHKLINE (+35%) and BERLIN-CHEMIE/MENARINI (+48%) moved one rank up, coming in at numbers five, nine and ten, respectively. On top of that, the latter broke into the ranks of the top 10 ranking for the first time. And only SANOFI (+26%) lost one ranking point, moving down to rank six. The total share of the analysed top 10 manufacturers did not virtually change and accounted for 36.6%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	1	**BAYER**	5.1	5.3
2	2	OTCPHARM	4.2	4.0
3	3	**SERVIER**	4.1	4.0
4	4	**STADA**	4.1	4.0
5	6	**KRKA**	3.6	3.7
6	5	**SANOFI**	3.5	3.8
7	7	**TEVA**	3.3	3.3
8	8	GEDEON RICHTER	3.0	3.3
9	10	**GLAXOSMITHKLINE**	2.9	2.9
10	11	**BERLIN-CHEMIE/MENARINI**	2.9	2.6
Total			36.6	36.7

*AIPM members are in bold

The first three leaders in the top-10 brands rating remained unchanged in composition, however it changed its leader: ARBIDOL (+80%) moved up to rank number one from two, displacing XARELTO (+38%) (Table 2). ELIQUIS (+75%) continued to be ranked third. The brands INGAVIRIN (2.1-fold growth in sales), THERAFLU (2.4-fold growth) and NIMESIL (2.3-fold growth) showed more than two-fold growth in sales, which allowed the former to move up from rank ten to four, and the latter two to move up from the third ten to rank six and eight. The less dynamic DETRALEX (+47%) improved its position by one rank, coming in at number five. In addition, they displaced the brands NUROFEN (+37%), CONCOR (+16%) and LORISTA (+28%) to the lower ranks. The total share of the top 10 brands increased from 8.1% to 9.8%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	2	ARBIDOL	1.6	1.2
2	1	XARELTO	1.5	1.4
3	3	ELIQUIS	1.3	1.0
4	10	INGAVIRIN	0.9	0.6
5	6	DETRALEX	0.8	0.8
6	20	THERAFLU	0.8	0.4
7	5	NUROFEN	0.8	0.8
8	24	NIMESIL	0.7	0.4
9	4	CONCOR	0.7	0.8
10	7	LORISTA	0.6	0.7
Total			9.8	8.1

* Here and elsewhere IQVIA's data are used

Following the corresponding brand, UMIFENOVIR (+83%) became a leader of the top 10 INN and group names ranking (Table 3). It moved up to rank number one from three, displacing XYLOMETAZOLINE (+41%) and RIVAROXABAN (+38%) one rank down. The other four INNs moved up to the higher ranks: DIOSMIN*HESPERIDIN (+52%), NIMESULIDE (+67%) and APIXABAN (+75%) moved up to ranks four through six respectively, and the newcomer ROSUVASTATIN (+50%) moved up to rank nine. At the same time, they displaced IBUPROFEN (+39%) one rank down, ATORVASTATIN (+21%) two ranks down, whereas BISOPROLOL (+14%) moved down from rank three to eight. In total, ten INNs and group names accounted for 12.8% of the regional sales against 11.7% in the year-earlier period.

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

Rank in the top ten		INN/Grouping name	Share in total pharmacy sales, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	4	UMIFENOVIR	1.7	1.2
2	1	XYLOMETAZOLINE	1.5	1.5
3	2	RIVAROXABAN	1.5	1.4
4	5	DIOSMIN*HESPERIDIN	1.4	1.2
5	7	NIMESULIDE	1.3	1.1
6	9	APIXABAN	1.3	1.0
7	6	IBUPROFEN	1.2	1.2
8	3	BISOPROLOL	1.1	1.3
9	12	ROSUVASTATIN	1.0	0.9
10	8	ATORVASTATIN	0.9	1.0
Total			12.8	11.7

The first three from the 10 ATC groups in the regional market held their own in the ranking (Table 4). They were C09 Agents acting on the rennin-angiotensin system (+27%), M01 Anti-inflammatory and antirheumatic products (+42%) and B01 Antithrombotic agents (+38%). The remaining brands of the top 10 shifted their ranks; moreover, four of them improved them. J05 Antivirals for systemic use (86%) and N02 Analgesics (+53%) moved two ranks up, coming in at ranks four and seven, displacing G03 Sex hormones (+36%), R01 Nasal preparations (+37%) and C05 Vasoprotectives (+36%) one rank down, despite the outstripping growth rates. R05 Cough and cold preparations (+34%) and A11 Vitamins (+29%) that moved up one rank, rounded out the top ten ranking. The top ten ATC groups accumulated 40.6% of the regional pharmacy sales, 39.1% 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. 2022	6 mon. 2021			6 mon. 2022	6 mon. 2021
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	6.2	6.6
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.6	5.3
3	3	B01	ANTITHROMBOTIC AGENTS	4.6	4.5
4	6	J05	ANTIVIRALS FOR SYSTEMIC USE	4.5	3.2
5	4	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.3	4.3
6	5	R01	NASAL PREPARATIONS	3.6	3.6
7	9	N02	ANALGESICS	3.3	2.9
8	7	C05	VASOPROTECTIVES	3.0	3.0
9	10	R05	COUGH AND COLD PREPARATIONS	2.9	2.9
10	11	A11	VITAMINS	2.8	2.9
Total				40.6	39.1

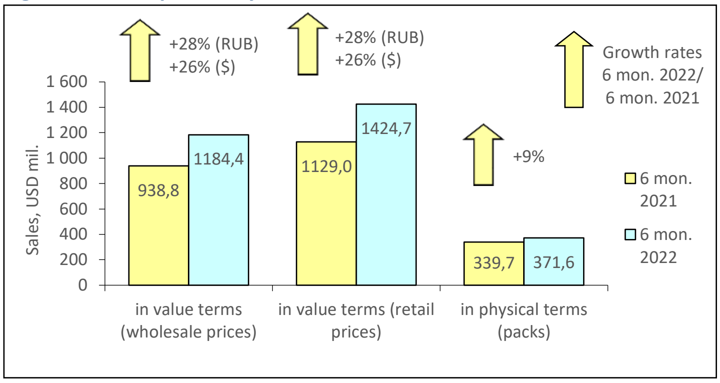
Conclusion. In January-June of 2022, the pharmacy market of the NWFD (without St Petersburg) brought in RUB 35.377 bil. (USD 462.753 mil.). which was 35% in terms of roubles and 32% in terms of dollars more than in the same period of 2021. In pack terms, the market also showed positive growth rates (+8%) and achieved 110.765 mil. packs. According to the results for the first half of 2022, the average cost of an FPP pack in the regional pharmacies was USD 4.18, Which was higher than the indicator of the same period of 2021 (USE 3.44) and average across the country (USD 4.15). The expenses of district residents for FPPs in the pharmacies were considerably lower than the national average (USD 54.29 vs. USD 62.09).

VFD PHARMACY MARKET: 2022 FIRST SIX MONTHS RESULTS

According to the Federal State Statistics Service, as of January 1, 2022, estimated population of the Volga Federal District (VFD) 28.844 mil., which accounted for 19.8% of the total Russian Federation population. According to Federal State Statistics Service's data, in the first half of 2022 the average salary in the VFD was RUB 44.281 (USD 581.96), which was 29% lower than the national average salary throughout Russia (RUB 61,961).

According to the results of Retail Audit of OTC drugs in Russian Federation™, the pharmacy market of VFD in pack terms expanded by 9% to 371.632 mil. packs for the first six months of 2022, as compared to the same period of the last year (Fig. 1). The sales in terms of wholesale prices increased by 28% in terms of roubles and 26% in terms of dollars and reached RUB 89.410 bil. (USD 1.184 bil). A region's share in the total pharmacy sales in Russia accounted for 15.7%. Based on the results for January-June of 2022, the average cost of an FPP in the VFD pharmacies increased as compared with the year-earlier period (USD 3.32) and was equal to USD 3.83. The average per capita expenses for purchase of drugs in the pharmacies were estimated at USD 49.39.

Figure 1. Russia pharmacy market for 6 months of 2021 – 6 months 2022.*



At the end of the first half of 2022, BAYER (+21%), OTCPHARM (+27%) and STADA (+34%) continued to take the lead in the top ten manufacturers on the Volga Federal District retail market (Table 1). TEVA (+14%) also held its previous rank eight. The manufacturers KRKA (+22%) and SERVIER (+32%) moved one rank up, coming in at numbers four and six, displacing SANOFI (+10%) and ABBOTT (+29%) one rank down. The newcomer GEDEON RICHTER (+24%) broke into the ranks of the top ten, coming in at number nine, and displaced SANDOZ (+14%) to the last rank. The total share of the top 10 brands reduced from 32.1% to 30.7%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	1	**BAYER**	4.0	4.2
2	2	OTCPHARM	4.0	4.0
3	3	**STADA**	3.8	3.6
4	5	**KRKA**	3.1	3.2
5	4	**SANOFI**	3.0	3.5
6	7	**SERVIER**	3.0	2.9
7	6	**ABBOTT**	2.9	2.9
8	8	**TEVA**	2.6	2.9
9	11	GEDEON RICHTER	2.3	2.3
10	9	**SANDOZ**	2.2	2.4
Total			30.7	32.1

*AIPM members are in bold

Two newcomers broke into the ranks of the top ten ranking (Table 2). INGAVIRIN (+75%) and EDARBI (+80%) moved up to ranks seven and nine. The other two brands also moved up to higher ranks. One of them, ARBIDOL (+99%) topped the top ten ranking, whereas the other one, DETRALEX (+27%), moved up to rank six from seven. At the same time, the first one displaced the former leaders ELIQUIS (+27%) and XARELTO (+52%) one rank down, to numbers two and three. CONCOR (+21%) rounding out the top 10 also lost one ranking point. The brands MEXIDOL (+22%), HEPTRAL (+19%) and ACTOVEGIN (+23%) held their previous ranks four, five and eight. The total share of the top 10 brands increased from 7.1% to 7.9%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	3	ARBIDOL	1.3	0.9
2	1	XARELTO	1.1	1.1
3	2	ELIQUIS	1.1	0.9
4	4	MEXIDOL	0.7	0.8
5	5	HEPTRAL	0.7	0.7
6	7	DETRALEX	0.6	0.6
7	13	INGAVIRIN	0.6	0.5
8	8	ACTOVEGIN	0.6	0.6
9	19	EDARBI	0.6	0.4
10	9	CONCOR	0.6	0.6
Total			7.9	7.1

Following the respective brand, UMIFENOVIR, which sales increased by 2.1 times, became the leader of the top ten INNs and grouping names ranking (Table 3). Note that the markets of another five of the top ten INNs developed at a fast pace. Among them was the former leader XYLOMETAZOLINE (+31%), which moved down to rank two. In contrast, the composition DIOSMIN* HESPERIDIN (+37%), as well as INN APIXABAN (+90%), IBUPROFEN (+51%) and NIMESULIDE (+33%) rose in the ranks, moving up to ranks three, five, seven and ten respectively. At the same time, the less dynamic RIVAROXABAN (+27%), BISOPROLOL and PANCREATIN (+19% each), as well as ETHYLMETHYLHYDROXYPYRIDINE (+22%) moved down to ranks four, six, eight and nine. In total, the top ten INNs and group names accounted for 11.2% of the regional market vs 10.4% in the year-earlier period.

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

Rank in the top ten		INN/Grouping name	Share in total pharmacy sales, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	6	UMIFENOVIR	1.8	1.1
2	1	XYLOMETAZOLINE	1.3	1.3
3	3	DIOSMIN*HESPERIDIN	1.2	1.1
4	2	RIVAROXABAN	1.1	1.1
5	9	APIXABAN	1.1	0.9
6	4	BISOPROLOL	1.0	1.1
7	8	IBUPROFEN	1.0	0.9
8	5	PANCREATIN	1.0	1.1
9	7	ETHYLMETHYLHYDROXYPYRIDINE	0.9	1.0
10	11	NIMESULIDE	0.9	0.8
Total			11.2	10.4

At the end of the first six months of 2022, C09 Agents acting on the renninangiotensin system (+23%) and M01 Anti-inflammatory and antirheumatic products (+31%) continued to remain the best-selling drugs on the regional market (Table 4). The most dynamic among the leaders J05 Antivirals for systemic use (+74%), which moved up from rank six, was ranked third in the top ten ranking. R01 Nasal preparations (+35%) and R05 Cough and cold preparations (+38%) also moved up to the higher ranks, six and nine. On top of that, the latter ones broke into the ranks of the top 10 ranking for the first time. At the same time, the groups B01 Antithrombotic agents (+27%) and G03 Sex hormones (+34%) lost one rank each, and J01 Antibacterials for systemic use (+13%) lost three ranks. N06 Psychoanaleptics (+27%) and N02 Analgesics (+33%) continued to hold ranks seven and nine. In total, the top ten ATC groups accumulated 38.2% of the regional sales, which was 1.3 p.p. higher than the year-earlier period indicator.

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. 2022	6 mon. 2021			6 mon. 2022	6 mon. 2021
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.6	5.9
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.2	5.1
3	6	J05	ANTIVIRALS FOR SYSTEMIC USE	4.4	3.2
4	3	B01	ANTITHROMBOTIC AGENTS	4.2	4.3
5	4	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.7	3.6
6	8	R01	NASAL PREPARATIONS	3.2	3.0
7	7	N06	PSYCHOANALEPTICS	3.0	3.1
8	5	J01	ANTIBACTERIALS FOR SYST USE	3.0	3.4
9	9	N02	ANALGESICS	3.0	2.9
10	13	R05	COUGH AND COLD PREPARATIONS	2.8	2.6
Total				38.2	36.9

Conclusion. Based on the results for the first half of 2022, the pharmacy market in the VFD was estimated at RUB 107.473 bil. (USD 1.425 bil.) at retail prices. At the same time, the market behaviour was positive both in rouble (+28%) and dollar (+26%) terms. In natural terms, the sales increased by 9% to 371.632 mil. packs. The average cost of OTC pack based on the results for January-June of 2022 was USD 3.83, which was more than in the year-earlier period (USD 3.32), but lower than the national average (USD 4.15). Per capita expenses of the district residents for purchase of medicines in the pharmacies were also lower than the national average figures (USD 49.39 vs. USD 62.09).

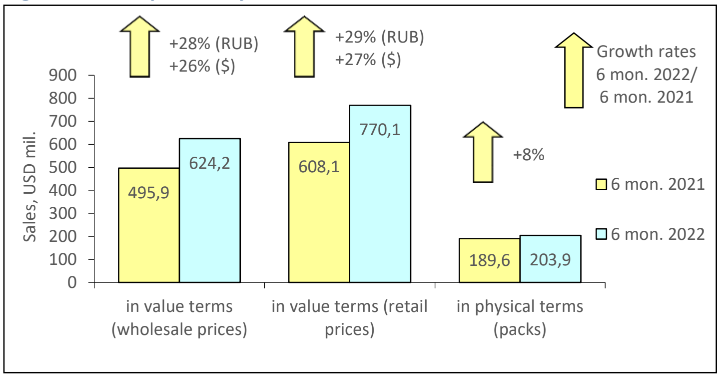
* Here and elsewhere IQVIA's data are used

SOUTHERN FEDERAL DISTRICT PHARMACY MARKET: 2022 FIRST SIX MONTHS RESULTS

According to the Federal State Statistics Service, as of January 1, 2022, estimated population of the Southern Federal District (SoFD) was 16.435 mil., which accounted for 11.3% of the total Russian Federation population. According to Federal State Statistics Service's data, based on the results for January-June of 2022 the average wage in SoFD was RUB 42,883 (USD 563.58), which was 31% lower than the national average salary throughout Russia (RUB 61,961).

According to the results of Retail Audit of OTC drugs in Russian Federation™, in the first half of 2022 the sales of drugs in natural terms (+8%) increased to 203.939 mil. packs. In money terms, the market also showed positive growth rates both in rouble (+28%) and in dollar terms (+26%) and reached RUB 47.169 bil. (USD 624.215 mil.) in wholesale prices (Fig. 1). The city market share accounted for 8.5% of the pharmacy sales in Russia. Based on the results for the first six months of 2022, the average cost of a finished pharma product (FPP) pack was USD 3.78 at retail prices vs. USD 3.21 in a year-earlier period. In the analysed period, the average amount spent by residents of the SoFD for drugs amounted to USD 46.86.

Figure 1. SoFD pharmacy market for 6 months of 2021 – 6 months 2022.*



At the end of January-June of 2022, BAYER (+22%) and OTCPHARM (+40%) contiued to take the lead in the top ten manufacturers ranking on the Southern Federal District market (Table 1). And if the former reduced its market share due to lagging rates, the latter expanded its market share and reinforced its position owing to 40% growth in sales. STADA (+40%) that showed the same growth rates, moved up from rank four to three, and SERVIER (+28%) moved up to rank four from six. At the same time, they displaced SANOFI (+18%) and ABBOTT (+19%) to ranks five and six. BERLIN-CHEMIE/MENARINI (+16%), TEVA (+14%) and GLAXOSMITHKLINE (+29%) held their previous ranks seven, eight and ten, despite legging growth rates in the former two. BINNOPHARM (+50%) became the only newcomer, which moved up to rank nine. In total, the top ten manufacturers accounted for 32.0% of the Russian market, whereas in the year– earlier period they had accounted for 32.3%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	1	**BAYER**	4.4	4.7
2	2	OTCPHARM	4.1	3.8
3	4	**STADA**	3.8	3.5
4	6	**SERVIER**	3.2	3.2
5	3	**SANOFI**	3.2	3.5
6	5	**ABBOTT**	3.1	3.3
7	7	**BERLIN-CHEMIE/MENARINI**	2.8	3.1
8	8	**TEVA**	2.5	2.8
9	12	BINNOPHARM GROUP	2.5	2.1
10	10	**GLAXOSMITHKLINE**	2.3	2.3
Total			32.0	32.3

*AIPM members are in bold

Two newcomers broke into the ranks of the top ten ranking (Table 2). INGAVIRIN (+68%) moved up to rank seven from 13, and CARDIOMAGNYL (+48%) moved up to rank ten from 15. ARBIDOL (2.4-fold growth in sales), HEPTRAL (+4%) and CONCOR (+36%) also moved up to the higher ranks, coming in at numbers one, four and nine, respectively. At the same time, they displaced ELIQUIS (+38%), XARELTO (+15%), DETRALEX (+3%) and ACTOVEGIN (+18%) down one rank. NUROFEN (+22%) became the only newcomer of the top ten ranking, which held its own in the ranking. The top ten brands accumulated 8.5% of the regional market, whereas in the year-earlier period their share was 7.8%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	3	ARBIDOL	1.7	0.9
2	1	ELIQUIS	1.4	1.3
3	2	XARELTO	1.1	1.2
4	5	HEPTRAL	0.7	0.8
5	4	DETRALEX	0.7	0.8
6	6	NUROFEN	0.6	0.7
7	13	INGAVIRIN	0.6	0.5
8	7	ACTOVEGIN	0.6	0.6
9	10	CONCOR	0.6	0.5
10	15	CARDIOMAGNYL	0.6	0.5
Total			8.5	7.8

The composition DIOSMIN* HESPERIDIN (+20%) continue to hold its previous rank four in the top ten INN and grouping names, whereas the remaining INNs changed them (Table 3). Four INNs were able to improve their positions. UMIFENOVIR (2.4-fold growth in sales) moved up to rank number one, NIMESULIDE (+36%) and IBUPROFEN (+43%) moved up to ranks five and seven, and the newcomer ADEMETIONINE (+15%) broke into the ranks of the top ten ranking for the first time. At the same time, the former displaced the composition XYLOMETAZOLINE (+32%) and APIXABAN (+38%) one rank down, despite the outperforming growth rates in both. RIVAROXABAN (+15%) and BISOPROLOL (+26%) lost one rank each, whereas PANCREATIN (+10%) moved down from rank three to eight. The total share of the top 10 increased from 11.4% to 12.1%.

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

Rank in the top ten		INN/Grouping name	Share in total pharmacy sales, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	7	UMIFENOVIR	1.9	1.0
2	1	XYLOMETAZOLINE	1.6	1.6
3	2	APIXABAN	1.4	1.3
4	4	DIOSMIN*HESPERIDIN	1.1	1.2
5	6	NIMESULIDE	1.1	1.0
6	5	RIVAROXABAN	1.1	1.2
7	9	IBUPROFEN	1.1	1.0
8	3	PANCREATIN	1.1	1.2
9	8	BISOPROLOL	0.9	1.0
10	11	ADEMETIONINE	0.8	0.9
Total			12.1	11.4

Most of the top-10 ATC groups showed outstripping growth rates in sales (Table 4). Among them were the leaders of the top ten M01 Anti-inflammatory and antirheumatic products (+31%) and C09 Agents acting on the rennin-angiotensin system (+33%). The most dynamic among the leaders J05 Antivirals for systemic use (+82%), which moved up from rank five, was ranked third in the top ten ranking. R01 Nasal preparations (+40%), G03 Sex hormones (+41%), N02 Analgesics and N06 Psychoanaleptics (+25% each) improved their rating positions by one rank, coming in at numbers five through seven and nine, respectively. The last position in the ranking was held by its only newcomer A10 Drugs used in diabetes (+50%). Due to lagging growth rates, the groups B01 Antithrombotic agents (+22%) and J01 Antibacterials for systemic use (+0.2%) moved down to ranks four and eight, respectively. The cumulative share of the top 10 increased from 36.7% to 38.3%.

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. 2022	6 mon. 2021			6 mon. 2022	6 mon. 2021
1	1	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.2	5.0
2	2	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	4.9	4.7
3	5	J05	ANTIVIRALS FOR SYSTEMIC USE	4.8	3.4
4	3	B01	ANTITHROMBOTIC AGENTS	4.5	4.7
5	6	R01	NASAL PREPARATIONS	3.6	3.3
6	7	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.5	3.2
7	8	N02	ANALGESICS	3.0	3.1
8	4	J01	ANTIBACTERIALS FOR SYST USE	3.0	3.8
9	10	N06	PSYCHOANALEPTICS	2.9	3.0
10	12	A10	DRUGS USED IN DIABETES	2.9	2.5
Total				38.3	36.7

Conclusion. Based on the results for the first six months of 2022, the pharmacy market of SoFD reached RUB 58.199 bil. (USD 770.077 mil.) at retail prices. At the same time, the sales increased by 29% in terms of roubles and 27% in terms of dollars. In pack terms, the market expanded by 8%, and its volume amounted to 203.939 mil. packs. Based on the results for January-June of the current year, the average cost of an FPP pack in the pharmacies of the region amounted to USD 3.78, which was more than in the previous year (USD 3.21), but lower than the national average (USD 4.15). In the analysed period, the average expenses of the SoFD residents for FPPs in the pharmacies were also lower than the national average (USD 46.86 vs. USD 62.09).

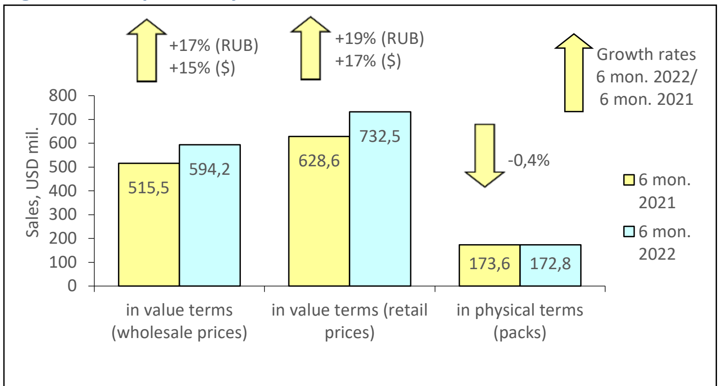
* Here and elsewhere IQVIA's data are used

UFD PHARMACY MARKET: 2022 FIRST SIX MONTHS RESULTS

According to Federal State Statistics Service, as of January 1, 2022, estimated population of the Ural Federal District (UFD) was 12.295 mil., which accounted for 8.4% of the total Russian Federation population. According to Federal State Statistics Service's data, in the first half of 2022 the average salary in the UFD was RUB 65,367 (USD 859.07), which was 5% higher than the average wage in Russia (RUB 61,961).

According to the results of the Retail Audit of Finished Pharma Products (FPP) in Russian Federation™, at the end of the first six months of 2022 the sales of FPP drugs in physical terms in the pharmacies of UFD saw a 0.4% reduction to 172.847 mil. packs. In value terms, the market demonstrated positive growth rates: it increased by 17% in rouble terms and by 15% in dollar terms and reached RUB 44.884 bil. (USD 594.158 mil.) in wholesale prices (Fig. 1). The regional retail sales share accounted for 8.1% of all pharmacy sales in Russia. The average retail cost of an FPP pack was USD 4.24 in January-June 2022 against USD 3.62 in the year-earlier period. For the first six months of 2022, the average amount spent by residents of UFD for medications amounted to USD 59.58.

Figure 1. UFD pharmacy market for 6 months of 2021 – 6 months 2022.*



Based on the results for January-June of 2022, most of the top ten manufacturers on the pharmacy market of the Ural Federal District (UFD) showed outstripping growth rates (Table 1). On top of that, almost all three of them showed progress in the ranks. STADA (+27%), SERVIER (+20%), ABBOTT and GEDEON RICHTER (+19% each) moved up one rank, coming in at numbers two, five, six and eight, respectively. The only newcomer of the top ten GLAXOSMITHKLINE (+23%) broke into the ranks of the top ten, coming in at number ten. In contrast, OTCPHARM (+23%) that showed the same growth rates lost one p.p., being displaced by the more dynamic STADA. TEVA (+4%) and KRKA (+7%) also moved down to the lower ranks seven and nine. BAYER (+15%) held its leading position in the ranking, and SANOFI (+2%) held its previous rank four. The total share of the top 10 drug manufacturers decreased from 32.8% to 32.3%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	1	**BAYER**	4.4	4.4
2	3	**STADA**	4.1	3.8
3	2	OTCPHARM	4.1	3.9
4	4	**SANOFI**	3.2	3.7
5	6	**SERVIER**	3.0	3.0
6	7	**ABBOTT**	2.9	2.9
7	5	**TEVA**	2.8	3.2
8	9	GEDEON RICHTER	2.8	2.8
9	8	**KRKA**	2.6	2.8
10	12	**GLAXOSMITHKLINE**	2.3	2.2
Total			32.3	32.8

*AIPM members are in bold

The top ten brands ranking changed their leader – due to 70% growth in sales, ARBIDOL moved up from rank two to one, displacing XARELTO (+22%) one rank down (Table 2). The other three drug manufacturers also rose in the ranks. ELIQUIS (+46%) moved one rank up, coming in at number three, whereas the more dynamic newcomers of the top ten INGAVIRIN (+70%) and FEMOSTON (+80%) moved up to ranks five and six. In contrast, the remaining brands of the top ten fell in the ranks. They were DETRALEX (+20%), NUROFEN (+19%) и LORISTA (+18%), as well as HEPTRAL (+2%) and PENTALGIN (+13%) that showed outstripping growth rates. The total share of Top-ten increased by 1 p.p. and achieved 7.1%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	2	ARBIDOL	1.2	0.8
2	1	XARELTO	1.0	1.0
3	4	ELIQUIS	0.9	0.7
4	3	DETRALEX	0.7	0.7
5	15	INGAVIRIN	0.6	0.4
6	20	FEMOSTON	0.6	0.4
7	5	HEPTRAL	0.6	0.7
8	6	NUROFEN	0.6	0.6
9	8	LORISTA	0.5	0.5
10	7	PENTALGIN	0.5	0.5
Total			7.1	6.2

XYLOMETAZOLINE (+23%) maintained and strengthened the leading position in the top ten INN and grouping names ranking (Table 3). UMIFENOVIR (+84%) moved up to rank two from seven, displacing the composition DIOSMIN*HESPERIDIN (+33%) one rank down. The newcomers APIXABAN (+46%) and ADEMETIONINE (+13%) also rose in the ranks, breaking into the top ten ranking and rounding it out. RIVAROXABAN (+22%), IBUPROFEN (+25%), ROSUVASTATIN (+21%) and NIMESULIDE (+24%) held their previous ranks four through six and eight, respectively. PANCREATIN that saw only a 9% growth in sales moved four ranks down, coming in at number seven. The cumulative share of the top 10 increased from 9.6% to 10.6%.

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

Rank in the top ten		INN/Grouping name	Share in total pharmacy sales, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	1	XYLOMETAZOLINE	1.4	1.3
2	7	UMIFENOVIR	1.4	0.9
3	2	DIOSMIN*HESPERIDIN	1.3	1.2
4	4	RIVAROXABAN	1.0	1.0
5	5	IBUPROFEN	1.0	1.0
6	6	ROSUVASTATIN	1.0	0.9
7	3	PANCREATIN	0.9	1.0
8	8	NIMESULIDE	0.9	0.9
9	14	APIXABAN	0.9	0.7
10	11	ADEMETIONINE	0.8	0.8
Total			10.6	9.6

M01 Anti-inflammatory and antirheumatic products (+23%) moved up to rank number one in the top ten ATC groups ranking, displacing C09 Agents acting on the rennin-angiotensin system (+10%) down to rank two (Table 4). G03 Sex hormones (+27%) continued to hold its previous rank three in the top ten ranking. The most dynamic among the leaders J05 Antivirals for systemic use (+54%) moved up to rank four from six, displacing the less dynamic B01 Antithrombotic agents (+21%) and R01 Nasal preparations (+17%) one rank down. The group N02 Analgesics (+22%), N06 Psychoanaleptics (+20%) and C05 Vasoprotectives (+19%) moved up to ranks seven through nine, respectively. Note that the latter has become the only newcomer of the top 10 rating. A11 Vitamins (+15%) moved down to the last rank from eight of the top ten ranking. In total, the top ten ATC groups accumulated 37.6% of the regional market, whereas in the year-earlier period they accounted for 36.0%.

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. 2022	6 mon. 2021			6 mon. 2022	6 mon. 2021
1	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.2	5.0
2	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.1	5.4
3	3	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.4	4.1
4	6	J05	ANTIVIRALS FOR SYSTEMIC USE	4.0	3.1
5	4	B01	ANTITHROMBOTIC AGENTS	3.7	3.6
6	5	R01	NASAL PREPARATIONS	3.5	3.5
7	10	N02	ANALGESICS	3.0	2.8
8	9	N06	PSYCHOANALEPTICS	2.9	2.8
9	11	C05	VASOPROTECTIVES	2.9	2.8
10	8	A11	VITAMINS	2.8	2.9
Total				37.6	36.0

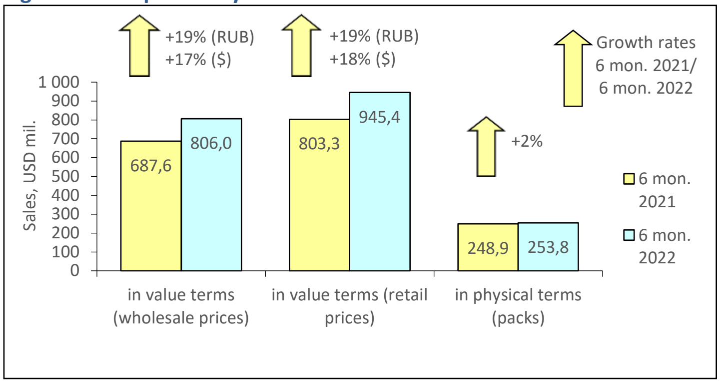
Conclusion. In January-June 2022, the pharmacy market of the Ural Federal District brought in RUB 55.353 bil. (USD 732.485 bil.) at retail prices. The regional volume increased by 19% in terms of roubles, and 17% in terms of dollars. In physical terms, the market reduced by 0.4% and amounted to 172.847 mil. packs. According to the results for 6 months of 2022, the average cost of an FPP pack in the district pharmacies was USD 4.24, which was higher than the last year figure (USD 3.62), and the national average (USD 4.15). However, the average expenses of the UFD residents for medications in the pharmacies were lower than the national average (USD 59.58 vs. USD 62.09).

* Here and elsewhere IQVIA's data are used

SiFD PHARMACY MARKET: 2022 FIRST SIX MONTHS RESULTS

According to Federal State Statistics Service, as of January 1, 2022, estimated population of the Siberian Federal District (SiFD. 16.889 mil., which accounted for 11.6% of the total Russian Federation population. According to Federal State Statistics Service's data, in January-June 2022, the average salary in the SiFD was RUB 53,824 (USD 707.37), which was 13% lower than the national average salary throughout Russia (RUB 61,961). According to the results of the Retail Audit of OTC drugs in Russian Federation™, in the first six months of 2022 the SFD pharmacy market volume expanded in physical terms by 2% and amounted to 253.764 mil. packs (Fig. 1) The sales in wholesale prices increased by 19% in terms of roubles and 17% in terms of dollars, reaching RUB 60.592 bil. (USD 806.021 mil.). The district's share accounted for 10.4% of the total pharmacy sales in the Russian pharmacy market pattern. Based on the results for the first half of 2022, the average cost of FPP pack in the SFD pharmacies was USD 3.73, whereas in the year-earlier period its cost was USD 3.23. In the analysed period, per capita expenses of the SiFD residents for purchase of medicines in pharmacies amounted to USD 55.98.

Figure 1. SiFD pharmacy market for 6 months of 2021 – 6 months 2022.*



The top ten drug manufacturers ranking on the Siberia Federal District retail market didn't change in composition based on the results for the first half of 2022 (Table 1). The top ten ranking did not change its leader either. As before, BAYER (+15%), STADA (+23%) and OTCPHARM (+25%) held their previous top three ranks. And if the former manufacturer slightly reduced its market share due to lagging rates, the remaining two, in contrast, expanded their market shares and reinforced their positions owing to the outstripping growth in sales. Another three manufacturers developed their markets by above average rates. KRKA (+22%) moved up to rank four from six, and SERVIER (+20%) and ABBOTT (+21%) held their previous ranks five and eight. Despite insignificant lagging rates, GEDEON RICHTER (+18%) moved one rank up, coming in at number 9. Due to low growth rates in sales, SANOFI (+2%) and SANDOZ (+ 5%) lost their ranking positions and moved down to ranks six and ten, respectively. TEVA (+10%) held its previous rank seven. The total share of the top 10 manufacturers has reduced from 33.8% 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. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	1	**BAYER**	4.4	4.5
2	2	**STADA**	4.2	4.0
3	3	OTCPHARM	4.0	3.8
4	6	**KRKA**	3.3	3.2
5	5	**SERVIER**	3.3	3.2
6	4	**SANOFI**	3.2	3.7
7	7	**TEVA**	2.9	3.2
8	8	**ABBOTT**	2.9	2.8
9	10	GEDEON RICHTER	2.5	2.5
10	9	**SANDOZ**	2.5	2.8
Total			33.1	33.8

*AIPM members are in bold

Two newcomers broke into the top ten brands ranking (Table 2). FEMOSTON (+69%) and INGAVIRIN (+46%) moved up to ranks eight and ten, respectively. The top three brands also showed high growth rates: ARBIDOL (+65%), ELIQUIS (+53) and XARELTO (+32%). At the same time, the former and the latter swapped their positions, whereas ELIQUIS held its previous rank two. DETRALEX (+24%) and LORISTA (+27%) held their previous ranks four and five. The remaining brands demonstrated lower than the average market growth rates. CARDIOMAGNYL (+16%) moved one rank up, coming in at number six, whereas PENTALGIN (+15%) and MEXIDOL (+10%), in contrast, lost on rank each and moved down to ranks seven and nine. In total, the top ten manufacturers accumulated 7.9% of pharmacy sales vs 6.9% 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. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	3	ARBIDOL	1.2	0.9
2	2	ELIQUIS	1.1	0.9
3	1	XARELTO	1.0	0.9
4	4	DETRALEX	0.8	0.8
5	5	LORISTA	0.8	0.7
6	7	CARDIOMAGNYL	0.6	0.6
7	6	PENTALGIN	0.6	0.6
8	20	FEMOSTON	0.6	0.4
9	8	MEXIDOL	0.6	0.6
10	14	INGAVIRIN	0.6	0.5
Total			7.9	6.9

Despite the change of leader in the prior rating, XYLOMETAZOLINE (+17%) held its previous rank number one in the top ten INN and group names rating (Table 3). The most dynamic among the leaders UMIFENOVIR (+69%) that moved up to this rank from rank five was ranked second. In addition to the leader, another three brands showed high growth rates. APIXABAN (+53%) moved up to rank four from eight, PANCREATIN (+14%) moved up to rank nine from ten. At the same time, they displaced the composition DIOSMIN* HESPERIDIN (+34%), as well as IBUPROFEN (+21%), BISOPROLOL (+11%) and NIMESULIDE (+25%) to the lower ranks three, five, six and eight. INN RIVAROXABAN (+32%) held its previous rank seven, and the only newcomer ROSUVASTATIN (+21%) rounded out the top ten ranking. The cumulative share of the top-ten increased by 0.8 p.p. and achieved 10.8%.

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

Rank in the top ten		INN/Grouping name	Share in total pharmacy sales, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	1	XYLOMETAZOLINE	1.4	1.5
2	5	UMIFENOVIR	1.4	1.0
3	2	DIOSMIN*HESPERIDIN	1.3	1.1
4	8	APIXABAN	1.1	0.9
5	4	IBUPROFEN	1.0	1.0
6	3	BISOPROLOL	1.0	1.1
7	7	RIVAROXABAN	1.0	0.9
8	6	NIMESULIDE	1.0	0.9
9	10	PANCREATIN	0.8	0.8
10	12	ROSUVASTATIN	0.8	0.8
Total			10.8	10.0

Half of the top-10 ATC groups held their own in the ranking (Table 4). They were the leading groups C09 Agents acting on the rennin-angiotensin system (+16%), M01 Anti-inflammatory and antirheumatic products (+23%), G03 Sex hormones (+24%) and B01 Antithrombotic agents (+27%), as well as R05 Cough and cold preparations (+19%) rounding out the top ten ranking. Three groups rose in the ranks. J05 Antivirals for systemic use (+45%) moved up to rank five from eight, C05 Vasoprotectives (+53%) from rank nine to eight, and the only newcomer N06 Psychoanaleptics (+21%) moved up to rank nine. The groups R01 Nasal preparations (+18%) and N02 Analgesics (+23%) lost one rank each and moved down to ranks six and seven, respectively. The commutative share of the top ten ATC groups expanded from 36.4% to 37.9%.

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. 2022	6 mon. 2021			6 mon. 2022	6 mon. 2021
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.5	5.6
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.4	5.2
3	3	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.3	4.1
4	4	B01	ANTITHROMBOTIC AGENTS	4.0	3.7
5	8	J05	ANTIVIRALS FOR SYSTEMIC USE	3.5	2.9
6	5	R01	NASAL PREPARATIONS	3.4	3.4
7	6	N02	ANALGESICS	3.4	3.3
8	9	C05	VASOPROTECTIVES	3.0	2.9
9	12	N06	PSYCHOANALEPTICS	2.7	2.7
10	10	R05	COUGH AND COLD PREPARATIONS	2.7	2.7
Total				37.9	36.4

Conclusion. At the end of the first half of 2022, the pharmacy market in the Siberian Federal District was estimated at RUB 71.042 bil. (USD 945.445 mil.) at final consumer prices. At the same time, the market behaviour was positive both in rouble (+19%) and in dollar (+18%) terms. In physical terms, the sales increased by 2% and amounted to 253.764 mil. packs. The average cost of an FPP pack increased as compared to a year earlier (USD 3.73 vs. USD 3.23) but continued to be lower than the national FPP price average in Russia (USD 4.15). Per capita expenses of the district residents for purchase of medicines in the pharmacies were also lower than the national average figures (USD 55.98 vs. USD 62.09).

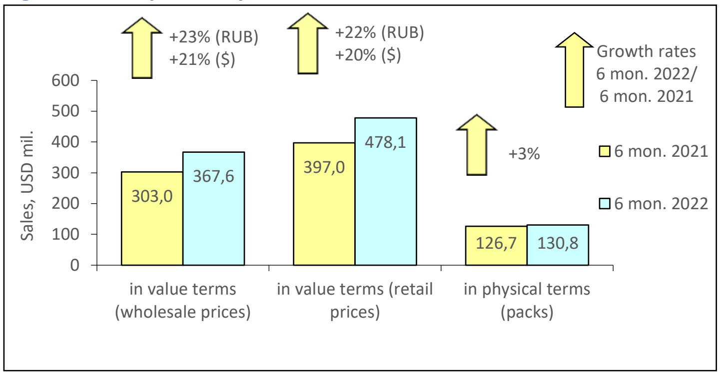
* Here and elsewhere IQVIA's data are used

FEFD PHARMACY MARKET: 2022 FIRST SIX MONTHS RESULTS

According to Federal State Statistics Service, as of January 1, 2022, estimated population of the Far Eastern Federal District (FEFD) was 8.091 mil., which accounted for 5.6% of the total Russian Federation population. According to Federal State Statistics Service, based on the results for the first half of 2022 the average wage in the FEFD was RUB 71131 (USD 934.83), which was 15% higher than the average wage in Russia (RUB 61,961).

According to the results of the Retail Audit of Finished Pharma Products (FPP) in Russian Federation™ at the end of the first half of 2022 the sales of drugs in physical terms in the pharmacies of the FEFD saw a 3% increase to 130.792 mil. packs. In money terms, the market expanded by 23% in terms of roubles, and 21% in terms of dollars. At the same time, the volume of the market amounted to RUB 27.690 bil. (USD (367.610 mil.) at wholesale prices (Fig. 1). The district's share accounted for 5.2% of the all-Russia sales in retail prices. The average cost of a pack increased as compared to a year earlier period (USD 3.13) and was equal to USD 3.66. The average amount spent by residents of FEFD on drugs in the pharmacies amounted to USD 59.09 for the first six months of 2022.

Figure 1. FEFD pharmacy market for 6 months of 2021 – 6 months 2022.*



OTCPHARM, which increased sales by 41% and moved up to rank number one in the top ten ranking from rank three, continued to be the most dynamic manufacturer in the retail market of the Far Eastern Federal District based on the results for the first half of 2022 (Table 1). SERVIER (+21%) and GEDEON RICHTER (+16%) moved up one rank, to numbers five and seven. At the same time, they displaced BAYER (+11%), STADA (+27%), SANOFI (+15%) and TEVA (+14%) one rank down. KRKA (+16%), SANDOZ (+12%) and GLAXOSMITHKLINE (+24%) continued to hold their previous ranks four and the last two ranks, respectively. The cumulative share of the top-ten reduced by 0.8 p.p. and achieved 34.0%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	3	OTCPHARM	4.6	4.0
2	1	**BAYER**	4.4	4.9
3	2	**STADA**	4.3	4.1
4	4	**KRKA**	3.2	3.4
5	6	**SERVIER**	3.1	3.2
6	5	**SANOFI**	3.1	3.3
7	8	GEDEON RICHTER	3.0	3.1
8	7	**TEVA**	2.9	3.2
9	9	**SANDOZ**	2.7	3.0
10	10	**GLAXOSMITHKLINE**	2.7	2.6
Total			34.0	34.8

*AIPM members are in bold

ARBIDOL (+94%) and XARELTO (+26%) held their leading positions in the top 10 ten brands ranking (Table 2). Shifts took place in the lower part of the top ten, and three of the top ten brands rose in the ranks. ELIQUIS (+54%) moved up to rank three from four, THERAFLU (+52%) moved up to rank five from nine, and the newcomer of the top ten ranking INGAVIRIN (+63%) moved up to rank seven. At the same time, NUROFEN (+30%), CARDIOMAGNYL (+22%), LORISTA (+7%) and CONCOR (+17%) moved down to ranks four and three bottom ranks, respectively. Brand DETRALEX (+25%) held its previous rank six. The aggregate share of the top-10 expended from 7.8% to 9.0%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	1	ARBIDOL	2.0	1.3
2	2	XARELTO	1.1	1.1
3	4	ELIQUIS	1.0	0.8
4	3	NUROFEN	0.8	0.8
5	9	THERAFLU	0.7	0.6
6	6	DETRALEX	0.7	0.7
7	14	INGAVIRIN	0.7	0.5
8	7	CARDIOMAGNYL	0.7	0.7
9	5	LORISTA	0.6	0.7
10	8	CONCOR	0.6	0.6
Total			9.0	7.8

UMIFENOVIR (+93%), which showed almost a two-fold increase in sales, moved up to rank number one in the top ten INNs and grouping names ranking (Table 3). The markets of another six INNs from the top ten ranking developed at a fast pace. IBUPROFEN (+29%), RIVAROXABAN (+26%) and NIMESULIDE (+31%) held their previous ranks three, four and seven, and the composition DIOSMIN*HESPERIDIN (+26%), APIXABAN (+54%) and INTERFERON ALFA-2B (+47%) moved up to ranks five, eight and ten. Not so dynamic XYLOMETAZOLINE (+22%), BISOPROLOL (+18%) and PANCREATIN (+22%), on the contrary, moved down to ranks two, six, and nine, respectively. The aggregate share of the top-10 expended from 10.6% to 11.9%

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

Rank in the top ten		INN/Grouping name	Share in total pharmacy sales, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	2	UMIFENOVIR	2.2	1.4
2	1	XYLOMETAZOLINE	1.7	1.7
3	3	IBUPROFEN	1.3	1.2
4	4	RIVAROXABAN	1.1	1.1
5	6	DIOSMIN*HESPERIDIN	1.1	1.0
6	5	BISOPROLOL	1.0	1.0
7	7	NIMESULIDE	1.0	0.9
8	10	APIXABAN	1.0	0.8
9	8	PANCREATIN	0.9	0.9
10	21	INTERFERON ALFA-2B	0.7	0.6
Total			11.9	10.6

M01 Anti-inflammatory and antirheumatic products (+29%) became the most in-demand group in the regional market and moved up to rank number one from six (Table 4). Apart from that, another four of the top ten ATC groups managed to rise in the ranks. J05 Antivirals for systemic use (+62%) and N02 Analgesics (+29%) moved up to ranks three and seven, and the newcomers of the top ten ranking R05 Cough and cold preparations (+40%) and A10 Drugs used in diabetes (+35%) moved up to ranks eight and ten. They displaced C09 Agents acting on the rennin-angiotensin system (+21%) and G03 Sex hormones (+25%) one rank down, though B01 Antithrombotic agents (+25%), which showed the same growth rates, continued to hold rank five. The groups R01 Nasal preparations (+24%) and J01 Antibacterials for systemic use (+12%) lost two ranks each and moved down to ranks six and nine, respectively. The total share of the analysed ranking accounted for 38.4% against 36.5% 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. 2022	6 mon. 2021			6 mon. 2022	6 mon. 2021
1	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.1	4.9
2	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	4.9	5.0
3	6	J05	ANTIVIRALS FOR SYSTEMIC USE	4.8	3.6
4	3	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.9	3.8
5	5	B01	ANTITHROMBOTIC AGENTS	3.8	3.8
6	4	R01	NASAL PREPARATIONS	3.8	3.8
7	8	N02	ANALGESICS	3.2	3.1
8	11	R05	COUGH AND COLD PREPARATIONS	3.1	2.7
9	7	J01	ANTIBACTERIALS FOR SYST USE	3.0	3.3
10	15	A10	DRUGS USED IN DIABETES	2.7	2.5
Total				38.4	36.5

Conclusion. In January-June 2022, the pharmacy market of the Far Eastern Federal District brought in RUB 35.996 bil. (USD 478.089 mil.). which was 22% in terms of roubles and 20% in terms of dollars more than in the same period of 2021. In pack terms, the market expanded by 3% and amounted to 130.792 mil. packs. The average cost of OTC pack in the FEFD pharmacies according to the results for the first six months of 2022 was USD 3.66, which was higher than the 2021 figure (USE 3.13), but less than the average across the country (USD 4.15). The average drug expenses of the district residents were also lower than the national average expenses in Russia (59.09 USD vs. 62.09 USD).

* Here and elsewhere IQVIA's data are used