A Joint Publication of the Association of International Pharmaceutical Manufacturers in Russia and Group of Companies Remedium

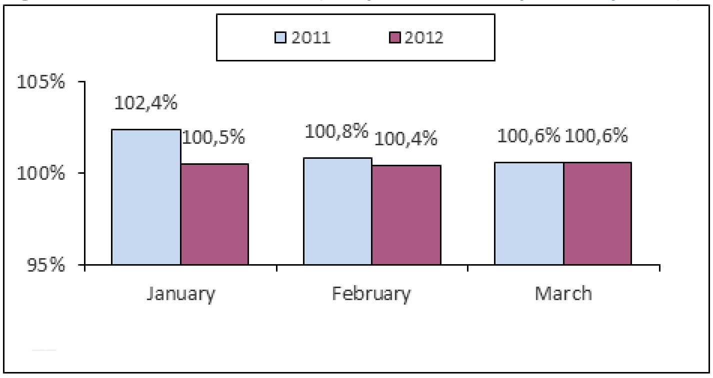
MACROECONOMIC INDICES

Inflation

According to Federal State Statistics Service's data, in March 2012, the Consumer Price Index was estimated as 100.6%, compared to the previous month. For the period from start of the year, it escalated to 101.5% (in January-March 2011 – 103.8%)

In March, Industrial Producer Price Index was 102.1%, whereas in the month-earlier period it had amounted to 101.1%. In January-March, it accounted for 102.9% (during the same period a year ago – 106.9%).

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



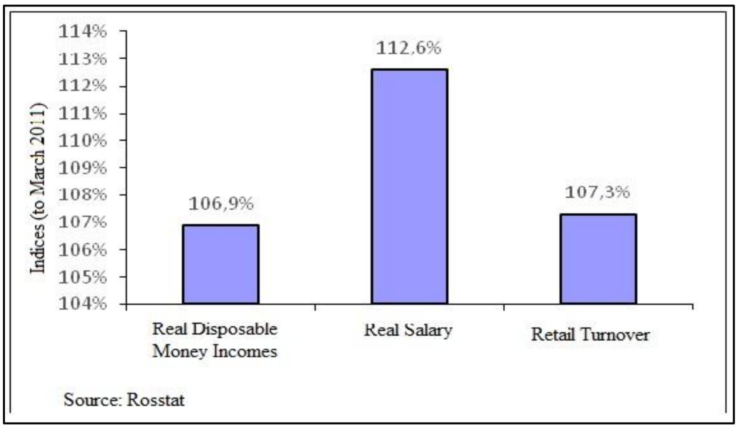
Living standard

According to preliminary Federal State Statistics Service's data, in March 2011 a gross monthly average salary per worker reached RUB 26,440 (USD 901.47) which accounted for 116.8% compared to March 2011 and 110.0% compared to February 2012. The real salary in March 2012 accounted for 112.6% as compared with the same period in 2011. In March 2012, the real value of cash incomes accounted for 106.9% compared to the same period of 2011 (Fig. 2).

Retail turnover

In March 2012, the retail turnover was equal to RUB 1,631.3 bln, which in stock accounts for 107.3% compared to the same period a year ago (Fig. 2).

Figure 2. Real value of cash incomes, salary and retail turnover in March 2012



Manufacture of industrial products

According to Federal State Statistics Service's data, in March 2012 Industrial Production Index accounted for 102.0% compared to the same period a year ago, 107.0% to February 2012, and 104.0% for year to date.

Domestic production

The Top-10 domestic manufacturers by production volume at March-end 2012 are shown in Table 1. The total production volume by top ten manufacturers was estimated at USD 282.4 mln.

Table1. Top-ten chemical and pharmaceutical manufacturers by production volume in March 2012

Rank	Drug Manufacturer	Production volume, $mln.
1	Pharmstandart	134,5
2	Stada	30,1
3	KRKA-RUS	28,2
4	Akrihin	19,3
5	Valenta	15,9
6	Pharm-Center	15,7
7	Sotex	11,0
8	Veropharm	9,9
9	Feron	9,6
10	Biosintez	8,4

Table 2 provides pharmacy sales data from 10 regions of the Russian Federation. In February 2012 compared to January 2012, growth in pharmacy sales (in terms of roubles) was observed in most analyzed regions. The most pronounced growth in sales was observed in St. Petersburg (+22%), the least one – in Perm (+0.3%). Reduction in sales was observed in Krasnodarsky Krai (-3%).

Table 2. Pharmacy sales in regions, 2011 - 2012

Region	Pharmacy sales, $mln (wholesale prices)			Growth gain, % (Roubles)		
	December 2011	January 2012	February 2012	December/ November 2011	January2012/ December 2011	February/ January 2012
Moscow city	194,6	137,9	174,1	22%	-33%	20%
St. Petersburg	48,4	36,3	46,3	14%	-29%	22%
Krasnodarsky Krai	31,3	26,6	26,9	7%	-20%	-3%
Novosibirskaya Oblast	25,2	19,7	22,4	14%	-26%	9%
Republic of Tatarstan	25,7	23,2	25,0	2%	-15%	3%
Krasnoyarsky Krai	17,4	14,6	16,5	7%	-21%	8%
Rostovskaya Oblast	21,9	18,0	19,3	10%	-23%	2%
Voronezhskaya Oblast	17,7	14,3	18,1	3%	-24%	21%
Perm city	6,8	5,9	6,2	17%	-18%	0,3%
Tyumen city	6,9	6,2	6,8	7%	-15%	5%

Advertising

The largest advertisers and pharmaceutical trade 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 March, 2012

Rank	Company*	Quantity of broadcasts
1	Pharmstandart	8 864
2	Evalar	8 001
3	Novartis	6 471
4	Berlin-Chemie Menarini Group	4 755
5	Reckitt Benckiser	2 993

Source – TNS Gallup AdFact

Table 4. Top-five trade names in mass media in March 2012

Rank	Trade name*	Quantity of broadcasts
1	Evalar	8 001
2	Grippferon	2 045
3	Complivit	1 816
4	Nurofen	1 644
5	Aphobazolum	1 298

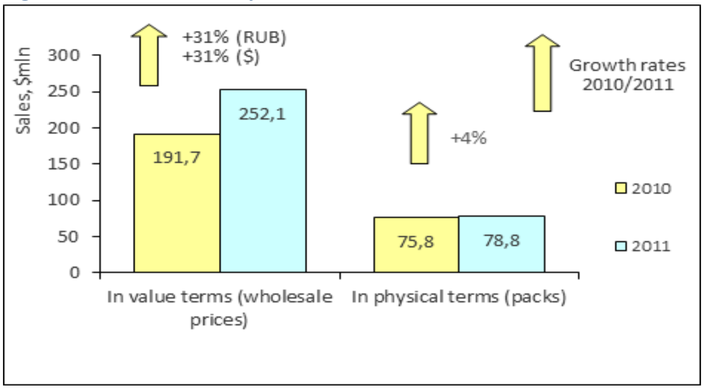
Source – TNS Gallup AdFact

* Only products registered with State Register of Medicines were considered

KAZAKHSTAN HOSPITAL MARKET: 2011 RESULTS

According to the results of the Retail Audit of Hospital Purchases in Kazakhstan™, in 2011 the country hospital market in physical terms increased by 4% to 78.825 million packs. The purchases in value terms also increased (by 31% both in Tenges and in USD) and achieved Tenges 36.939 billion (USD 252.060 million) in wholesale prices. In 2011, the average cost of OTC pack in the hospital sector was USD 3.20, whereas in the year-earlier period its cost was USD 2.53.

Figure 1. Kazakhstan hospital market for 2010 – 2011



At 2011-end, domestic drugs (18%) accounted for the most significant share in the country hospital market, which didn't change as compared to a year-earlier. The share of OTC-drugs made in Denmark was eleven per cent, the share of OTC-drugs made in Switzerland and Germany was 10% each. OTC-drugs made in Belgium (9%) and Great Britain (6%) accounted for the high shares in the market. OTC drugs from Russia accumulated 1.6% of Kazakhstan hospital market, which is prominently less than in the year-earlier period (2.3%).

Khimpharm which drugs purchases increased 30% remained the leader of Top-10 manufacturers ranking by pharmacy sales in the Kazakhstan hospital market based on the results of 2011 (table 1). NYCOMED moved upwards to rank two from three due to increase in purchases 1.6 times displacing SANOFI-AVENTIS (+29%) down one rank. Janssen-Cilag (+92%), F. Hoffmann-La Roche (+59%) and drugs of unidentified drug makers held their own numbers from 4 through 6 in the top ten. BAYER (+30%) moved up to rank eight, whereas TEVA (-36%) which used to hold that rank earlier moved down two ranks to number 9. The newcomers broke into the ranks of the top ten, coming in at numbers eight and ten - GLAXOSMITHKLINE (+65%) and Merck Sharp & Dohme (+55%). The total share accumulated by the top 10 manufacturers increased nearly 2 p.p. and escalated to 60.6%.

Table 1. The top 10 drug manufacturers by hospital purchases

Rank		Drug manufacturer*	Share in total hospital purchases, %	
2011	2010		2011	2010
1	1	KHIMPHARM OJSC	13,5	13,6
2	3	**NYCOMED**	8,7	7,4
3	2	**SANOFI-AVENTIS**	8,5	8,6
4	4	**JANSSEN-CILAG AG**	8,2	5,6
5	5	**F. HOFFMANN-LA ROCHE LTD**	6,6	5,5
6	6	Unidentified manuf.	3,9	5,4
7	8	**BAYER HEALTHCARE**	3,4	3,5
8	11	**GLAXOSMITHKLINE**	3,3	2,6
9	7	**TEVA**	2,3	4,8
10	14	**MERCK SHARP & DOHME B.V.**	2,1	1,8
Total			60,6	58,6

*AIPM members are in bold

Following the results of the year, only one newcomer broke into the top-ten manufacturers ranking in the hospital market of Kazakhstan – due to growth in purchase 1.6 times, Avastin moved up from rank 11 to 8 (table 2). The other three trade names s also rose in the ranks. They were OTC drugs Herceptine (which purchases increased 1.6 times), Eprex (2.1 times) and Clexane (+43%) which moved up to ranks 2, 3 and 6 respectively. At the same time, five less dynamic drugs (Curosurf, Actovegin, Sodium chloride, Cef IV and Cefazolin) moved down to the lower ranks. Despite the delay in growth rates and reduction of market share, Taxotere (+17%) remained the leader of the regional ranking.

Table 2. The top 10 trade names by hospital purchases

Rank		Trade Name	Share in total hospital purchases, %	
2011	2010		2011	2010
1	1	Taxotere	4,6	5,2
2	3	Herceptine	3,1	2,5
3	7	Eprex	3,1	1,9
4	2	Curosurf	2,4	2,7
5	4	Actovegin	2,4	2,4
6	9	Clexane	1,8	1,7
7	5	Sodium chloride	1,8	2,4
8	11	Avastin	1,7	1,4
9	8	Cef IV	1,7	1,7
10	6	Cefazolin	1,6	2,1
Total			24,3	23,9

The top INN and generic names ranking leaders managed to hold their own (table 3). As before, drugs of unidentified composition and Docetaxel (+17%) held two first ranks in the top ten. Cefepime (+19%) kept its rank seven. Three INNs with relatively low or negative sales growth: Poractant alfa (+15%), Sodium chloride (-1%) and Meropenem (+17%) moved down to lower ranks 5, 9 and 10, respectively. In this connection, the INNs with high positive growth rates rose in the ranks. They were Trastuzumab (+63%), Epoetin alfa (purchases grew 2.1 times), Aprotinin (+59%) and Enoxaparin sodium (+43%), coming up at numbers four, six and eight, respectively. Note that the two latter INNs broke in the top -10 ranking for the first time.

Table 3. The top 10 INN and Generic Names by hospital purchases

Rank		INN/Generic Name	Share in total hospital purchases, %	
2011	2010		2011	2010
1	1	Unidentified	6,3	5,3
2	2	Docetaxel	4,6	5,2
3	4	Trastuzumab	3,1	2,5
4	9	Epoetin alfa	3,1	1,9
5	3	Poractant alfa	2,4	2,7
6	12	Aprotinin	2,1	1,7
7	7	Cefepime	1,9	2,1
8	13	Enoxaparin sodium	1,8	1,7
9	5	Sodium chloride	1,8	2,4
10	8	Meropenem	1,8	2,0
Total			29,0	27,5

One newcomer entered the Top ten ATC groups ranking as well (table 4). It was V08 Contrast media (+51%) which moved up from rank 13 to 10. On top of that, due to two-fold growth in purchases, B03 Antianemic preparations moved up two ranks, and group N06 Psychoanaleptics (+68%) moved up one rank, coming in at number 8. At the same time, B01 Antithrombotic agents (+40%), N05 Psycholeptics (+17%) and R07 Other respiratory system products (+34%) placed at numbers 6, 7 and 9, respectively. The four first ranks were held by groups L01 Antineoplastic agents (+30%), J01 Antibacterials for systemic use (+21%) and B05 Blood substitutes and perfusion solutions (+12%) and B02 Antihemorrhagics (+48%). The total share of the top 10 ATC groups increased and achieved 67.6%.

Table 4. The top 10 ATC groups by hospital purchases

Rank		ATC code	ATC group	Share in total hospital purchases, %	
2011	2010			2011	2010
1	1	L01	Antineoplastic agents	17,8	17,9
2	2	J01	Antibacterials for systemic use	16,0	17,4
3	3	B05	Blood substitutes and perfusion solutions	7,0	8,2
4	4	B02	Antihemorrhagics	5,1	4,5
5	7	B03	Antianemic preparations	4,8	3,0
6	5	B01	Antithrombotic agents	4,6	4,3
7	6	N05	Psycholeptics	3,6	4,0
8	9	N06	Psychoanaleptics	3,2	2,5
9	8	R07	Other respiratory system products	2,8	2,8
10	13	V08	Contrast media	2,7	2,3
Total				67,6	66,8

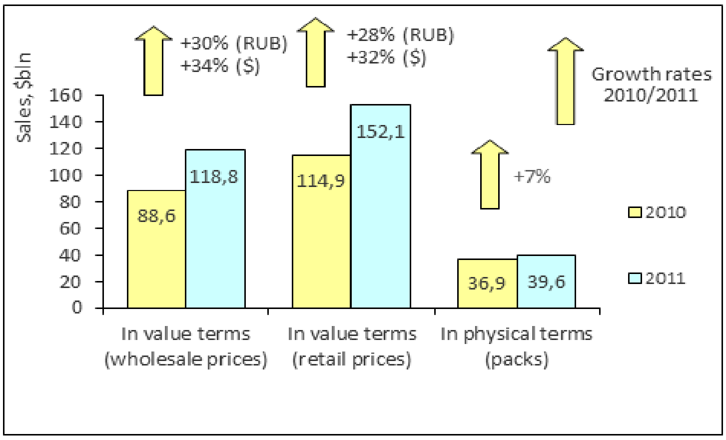
Conclusion. At the end of 2011, Kazakhstan hospital market grew by nearly one third (31% both in Tenge terms and in dollar terms) and brought in USD 252.060 mln (Tenge 36.939 bln). In pack terms, the market also showed the positive, but less pronounced growth rates (+4%). It should be noted that growth rates reduced as compared to a year earlier (+78% in terms of tenges, +79% in terms of USD and +49% in physical terms). In 2011, the average cost of an OTC pack in Kazakhstan hospital sector was higher than in the year-earlier period (USD 3.20 vs. USD 2.53). As the analyzed rankings show, the hospital market experienced considerable structural changes, though the leaders remained unchanged.

UFA PHARMACY MARKET: 2011 RESULTS

According to Federal State Statistics Service, as of January 1, 2011 the population of Ufa was estimated as 1.075 mln, which accounts for 0.75% of the total Russian Federation population and 3.6% of Povolzhskiy FO (PFO). According to Federal State Statistics Service's data, in 2011 the average salary in the Republic of Bashkortostan was RUR 18,427.4 (USD 627.21), which is 22% lower than the average salary in Russia (RUB 23,693.1).

According to the results of the Retail Audit of Over-the-Counter Drugs (OTC) in Russian Federation™, at 2011-end the sales of OTC drugs in physical terms in pharmacies of Ufa city saw a 7% increase to 39.558 mln packs. In value terms, the regional OTC drugs market increased 30% in rouble terms and 34% in dollar terms and achieved RUB 3.500 bln (USD 118.806 bln) in wholesale prices (Fig.1). The city's share accounts for 1% of the Russian retail pharmacy market. The average cost of an OTC pack grew as compared to a year earlier (USD 3.12) and reached USD 3.84 in retail prices. For twelve months of 2011, the average amount spent by residents of the city for drugs amounted to USD 141.48.

Figure 1. Ufa pharmacy market for 2010 – 2011



At the end of 2011, the French drug maker SANOFI-AVENTIS (+32%[1]) and the Russian drug maker PHARMSTANDART (+28%) remained the leaders of the top ten pharmaceutical manufacturers regional ranking (Table 1). On top of that, the former showed outperformance and expended its market share, whereas the latter reduced its market share owing to low growth rates. Due to 1.5 times increase in sales, the most dynamic of the top ten drug makers ABBOTT moved up to rank three . On top of that, it displaced SANDOZ (+36%) down one rank to number 4. One more drug maker of the top ten - MENARINI (+20%) – moved down one rank, from number 8 to 9, giving the way to NYCOMED (+36%). The other four drug makers of the top ten (BAYER, SERVIER, GEDEON RICHTER and TEVA) held their own in the ranking. The cumulative share of the top ten manufacturers increased from 39% to 39.8%.

Table 1. The top 10 drug manufacturers by pharmacy sales

Rank		Drug manufacturer*	Share in total pharmacy sales, %	
2011	2010		2011	2010
1	1	**SANOFI-AVENTIS**	5,8	5,6
2	2	PHARMSTANDART	5,0	5,1
3	4	**ABBOTT**	4,6	4,0
4	3	**SANDOZ GROUP**	4,4	4,2
5	5	**BAYER HEALTHCARE**	3,9	3,9
6	6	**SERVIER**	3,6	3,6
7	7	**GEDEON RICHTER**	3,4	3,4
8	9	**NYCOMED**	3,3	3,1
9	8	**MENARINI**	3,1	3,3
10	10	**TEVA**	2,9	2,8
Total			39,8	39,0

*AIPM members are in bold

Three trade names held their own in the top-ten trade names ranking (table 2). They were the leaders for the top-10 ESSENTIALE N (+21%) and ARBIDOL (+12%), as well as KETONAL (+25%) placed on rank 6. As to the rest trade names in the ranking, most of them rose in the ranks and only VIAGRA (+10%) moved down from rank 3 to 5. HEPTRAL (+50%), ACTOVEGIN (+29%), MEXIDOL (+49%) and ANAFERON (+35%) moved up one spot, coming in at numbers 3, 4 and 7 and 8, respectively. The newcomers of the top-10 ranking, CIALIS (+66%) and DUPHASTON (+72%) showed the more significant progress in the ranking, coming in at two bottom lines of the top ten, respectively.

Table 2. The top ten pharmaceutical products by pharmacy sales

Rank		Trade Name	Share in total pharmacy sales, %	
2011	2010		2011	2010
1	1	ESSENTIALE N	1,6	1,7
2	2	ARBIDOL	1,4	1,6
3	4	HEPTRAL	1,2	1,1
4	5	ACTOVEGIN	1,0	1,0
5	3	VIAGRA	1,0	1,1
6	6	KETONAL	0,9	0,9
7	8	MEXIDOL	0,8	0,7
8	9	ANAFERON	0,7	0,7
9	17	CIALIS	0,7	0,5
10	22	DUPHASTON	0,6	0,5
Total			9,9	9,9

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

Two newcomers entered the top ten INN and Generic Names Ranking - AMBROXOL (+61%) and EMOXIPIN (+52%), coming in at numbers 8 and 9 (table 3). Three more INNs managed to rise in the ranks: PANCREATIN (+34%) and BLOOD (+29%) moved up one rank, coming in at numbers 2 and 6, respectively. ADEMETIONINE (+51%) moved up two ranks, from number 6 to 4. In this connection, the less dynamic INNs ARBIDOL (+12%), KETOPROFEN (+24%) and SILDENAFIL (+10%) moved down. The leader of the top ten PHOSPHOLIPIDS (+24%) and INN placed at the bottom line AZITHROMYCIN (+37%) held their own in the ranking. As in the previous ranking, the total share of the top 10 INN and Generic Names under consideration didn't change and was equal to 11.9%.

Table 3. The top 10 INN and Generic Names by pharmacy sales

Rank		INN/Generic Name	Share in total pharmacy sales, %	
2011	2010		2011	2010
1	1	PHOSPHOLIPIDS	1,7	1,8
2	3	PANCREATIN	1,7	1,6
3	2	ARBIDOL	1,4	1,6
4	6	ADEMETIONINE	1,3	1,1
5	4	KETOPROFEN	1,2	1,3
6	7	BLOOD	1,1	1,1
7	5	SILDENAFIL	1,0	1,1
8	13	AMBROXOL	0,9	0,7
9	11	EMOXIPIN	0,9	0,8
10	10	AZITHROMYCIN	0,8	0,8
Total			11,9	11,9

As compared to a year earlier, the structure of the top 10 ATC-group ranking didn't change, but it underwent numerous shifts (table 4). The Top-10 ranking was topped by group J01 Antibacterials for systemic use (+31%) and M01 Anti-inflammatory and antirheumatic products (+33%), whereas the former leader N02 Analgesics (+6%) moved down to rank 3. Groups R05 Cough and cold preparations (+54%), G03 Sex hormones (+42%) and N06 Psychoanaleptics (+34%) also rose in the ranks, coming in at numbers 4, 5 and 9, respectively. At the same time, A11 Vitamins (+28%), drugs of unidentified pharmaceutical groups and G04 Urologicals (+26%) moved down to the lower ranks. Group A05 Bile and liver therapy (+29%) held its rank 8. The total share of the analyzed top 10 ATC groups virtually remained unchanged and accounted for 39.1%.

Table 4. The top 10 ATC Groups by pharmacy sales

Rank		ATC code	ATC group	Share in total pharmacy sales, %	
2011	2010			2011	2010
1	2	J01	ANTIBACTERIALS FOR SYST USE	5,2	5,1
2	3	M01	ANTIINFLAM & ANTIRHEUM PROD	4,5	4,4
3	1	N02	ANALGESICS	4,2	5,2
4	7	R05	COUGH AND COLD PREPARATIONS	4,0	3,4
5	6	G03	SEX HORM&MODULAT GENITAL SYS	3,9	3,6
6	5	A11	VITAMINS	3,8	3,8
7	4		Unidentified	3,7	3,9
8	8	A05	BILE AND LIVER THERAPY	3,4	3,4
9	10	N06	PSYCHOANALEPTICS	3,3	3,1
10	9	G04	UROLOGICALS	3,2	3,3
Total				39,1	39,2

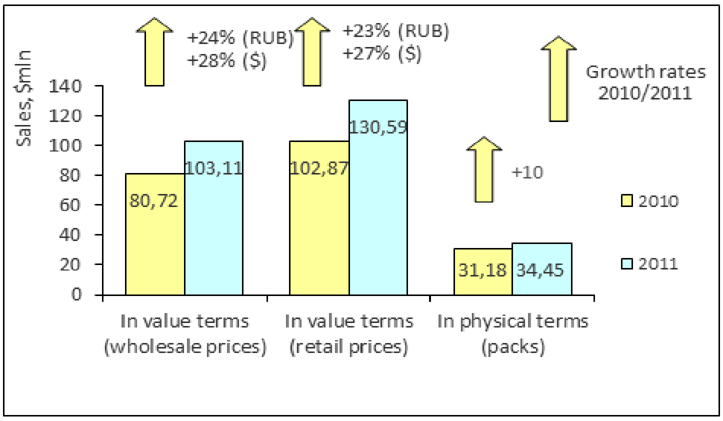
Conclusion. At 2011-end, the Ufa retail market brought in RUB 4.480 bln (USD 152.084 mln), The market saw a 28% increase in terms of roubles and 32% in terms of dollars. The segment in physical terms also showed positive growth rates (+7%) and reached 39.558 mln packs. The average cost of a pack at the end of 2011 was notably higher than the same indicator in the past year (USD 3.84 vs. USD 3.12), which is more than the national average in Russia (USD 3.48). The average expenses of Russia residents for purchase of OTC drugs in pharmacies also increased (USD 141.48 vs. USD 111.01).

OMSK PHARMACY MARKET: 2011 RESULTS

According to Federal State Statistics Service, as of January 1, 2011 the population of Omsk was estimated as 1.154 mln, which accounts for 0.8% of the total Russian Federation population and 6.0% of Siberian FO (SFO). According to Federal State Statistics Service's data, in 2011 the average salary in the Omsk region was RUR 19,113.8 (USD 650.57), which is 19% lower than the average salary in Russia (RUB 23,693.1).

According to the results of the Retail Audit of over-the-counter (OTC) drugs in Russian Federation™, in Omsk the sales of over-the-counter drugs in physical terms increased by 10% to 34.448 mln packs over the period of twelve months of 2011. In value terms, the city OTC drugs market (exclusive of Beneficiary Drug Coverage) saw 24% increase in terms of roubles and 28% increase in terms of dollars compared to the same period a year ago and reached RUB 3.040 bln (USD 103.113 mln) in wholesale prices (Fig.1). The region share in the total volume of all-Russia pharmacy market accounted for 0.8%. The average cost of an OTC pack grew as compared to a year earlier (USD 3.30) and reached USD 3.79 in retail prices. In 2011, the Omsk consumers spent on drugs USD 113.16 on the average.

Figure 1. Omsk pharmacy market for 2010 – 2011



The markets of the most drug makers from the top 10 manufacturers in the Omsk market developed at a fast pace (table 1). The only exception was MENARINI (+15%) and TEVA (+14%), which due to delay in growth rates reduced their market shares and moved down to the lower ranks 8 and 10. Apart from that, PHARMSTANDART and GEDEON RICHTER (+27% each) moved down one rank, as they were displaced by the more dynamic drug makers BAYER (+31%) and NYCOMED (+37%), coming in at numbers three and five, respectively. PFIZER (+27%) and KRKA (+25%) also rose in the ranks. On top of that, the latter became the only one newcomer of the top ten. SANOFI-AVENTIS (+30%) and SERVIER (+31%) held their leading positions in the top ten. The total share of the top-ten manufacturers increased by almost 1 p.p. and accounted for 38.6%.

Table 1. The top 10 drug manufacturers by pharmacy sales

Rank		Drug manufacturer*	Share in total pharmacy sales, %	
2011	2010		2011	2010
1	1	**SANOFI-AVENTIS**	6,0	5,6
2	2	**SERVIER**	5,5	5,3
3	4	**BAYER HEALTHCARE**	4,3	4,1
4	3	PHARMSTANDART	4,3	4,3
5	7	**NYCOMED**	3,5	3,2
6	5	**GEDEON RICHTER**	3,4	3,3
7	8	**PFIZER**	3,2	3,1
8	6	**MENARINI**	3,0	3,2
9	11	**KRKA**	2,8	2,8
10	9	**TEVA**	2,7	2,9
Total			38,6	37,7

*AIPM members are in bold

The leader of the Top-10 Trade Names Ranking didn't change either – the antiviral drug ARBIDOL (+23%) held its leading position in the ranking (table 2). ESSENTIALE N (+32%) and ACTOVEGIN (+34%) moved up to ranks two and three, whereas from 3rd one, whereas VIAGRA (-5%) which reduced its sales moved down to rank 4. Apart from it, another two names - CIALIS (+13%) and ANAFERON (+24%) – moved down to the lower ranks, coming in at numbers 8 and 9. The other four trade names of the Top ten rose in the ranks: ALFLUTOP (+74%) moved up from rank 8 to 5 and DETRALEX (+56%) moved up from rank 7 to 6. The most dynamic preparation of the ranking which broke into the top ten for the first time, LOZAP PLUS (+78%) moved up to number seven. The second newcomer of the ranking LINEX (+45%) moved down to the bottom rank of the top ten.

Table 2. The top 10 trade names by pharmacy sales

Rank		Trade Name	Share in total pharmacy sales, %	
2011	2010		2011	2010
1	1	ARBIDOL	1,2	1,2
2	3	ESSENTIALE N	0,9	0,9
3	4	ACTOVEGIN	0,9	0,9
4	2	VIAGRA	0,8	1,0
5	8	ALFLUTOP	0,8	0,6
6	7	DETRALEX	0,8	0,6
7	17	LOZAP PLUS	0,7	0,5
8	5	CIALIS	0,6	0,7
9	6	ANAFERON	0,6	0,6
10	14	LINEX	0,6	0,5
Total			8,0	7,5

A total of three newcomers broke into the ranks of the top ten INN and generic names (table 3). They were the composition LOSARTAN + HYDROCHLOROTHIAZIDE (which sales increased 1.8 times), INN FISH (1.7 times) and one more composition DIOSMIN + HESPERIDIN (1.6 times) which moved up to ranks 6, 9 and 10 respectively. INNs PHOSPHOLIPIDS (+38%) and BISOPROLOL (+50%) also rose in the ranks, coming in at numbers three and four, respectively. ARBIDOL (+23%) and PANCREATIN (+28%) kept the two first ranks in the top ten. INN BLOOD (+32%) placed at rank 5 didn't change its position either. XYLOMETAZOLINE (+17%) and SILDENAFIL (-5%) moved down to ranks 7 and 8. The total share of the top 10 increased from 8.7% to 9.4%.

Table 3. The top 10 INN and Generic Names by pharmacy sales

Rank		INN/Generic Name	Share in total pharmacy sales, %	
2011	2010		2011	2010
1	1	ARBIDOL	1,2	1,2
2	2	PANCREATIN	1,1	1,1
3	4	PHOSPHOLIPIDS	1,1	1,0
4	8	BISOPROLOL	1,0	0,8
5	5	BLOOD	1,0	0,9
6	24	LOSARTAN + HYDROCHLOROTHIAZIDE	0,9	0,6
7	6	XYLOMETAZOLINE	0,8	0,9
8	3	SILDENAFIL	0,8	1,0
9	27	FISH	0,8	0,6
10	21	DIOSMIN + HESPERIDIN	0,8	0,6
Total			9,4	8,7

One newcomer broke into the ranks of the top ten ATC groups - Group S01 Ophthalmologicals (+38%), moving up from rank 11 to 8. The other four groups rose in the ranks: C09 Agents acting on the rennin-angiotensin system (+39%), G03 Sex hormones (+30%) and M01 Anti-inflammatory and antirheumatic products (+35%), coming in at the first three ranks, and R05 Cough and cold preparations (+41%), moving up from number 9 to 6. At the same time, they displaced the less dynamic groups J01 Antibacterials for systemic use (+9%), N02 Analgesics (+18%), G04 Urologicals (+17%), A11 Vitamins (+16%) and preparations of unidentified pharmaceutical groups down to the lower ranks. The total share of the top ten ATC groups, as well as in the above rankings, increased and reached 38.1%.

Table 4. The top 10 ATC Groups by pharmacy sales

Rank		ATC code	ATC group	Share in total pharmacy sales, %	
2011	2010			2011	2010
1	2	C09	AG ACT RENIN-ANGIOTENS SYST	5,0	4,4
2	3	G03	SEX HORM&MODULAT GENITAL SYS	4,5	4,3
3	5	M01	ANTIINFLAM & ANTIRHEUM PROD	4,4	4,1
4	1	J01	ANTIBACTERIALS FOR SYST USE	4,1	4,6
5	4	N02	ANALGESICS	4,1	4,3
6	9	R05	COUGH AND COLD PREPARATIONS	3,4	3,1
7	6	G04	UROLOGICALS	3,4	3,6
8	11	S01	OPHTHALMOLOGICALS	3,2	2,9
9	7	A11	VITAMINS	3,1	3,3
10	8		Unidentified	2,8	3,3
Total				38,1	37,9

Conclusion. At the end of 2011, the retail OTC drugs market of Omsk brought in RUB 3.850 bln (USD 130.590 mln). The market saw a 23% increase in terms of roubles and 27% in terms of dollars. The city market in physical terms also showed the positive sales growth rates (+10%) and reached 34.448 mln packs. The average cost of a pack at the end of twelve months was markedly higher than the same value a year ago (USD 3.79 vs. USD 3.30). Per capita expenses for purchase of medicines in pharmacies of Omsk amounted to USD 113.16. Note that both the average cost of an OTC pack and the average sum spent by residents of the city for the purchase of OTC were higher than the Russia average (cost of OTC drug – USD 3.48 and average expenses – USD 111.01).

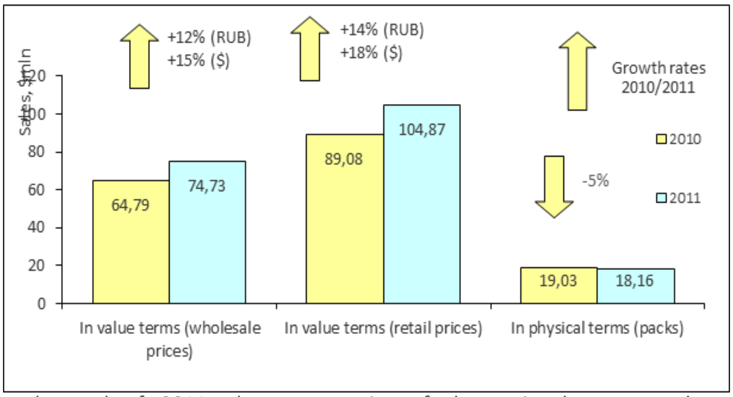
IRKUTSK PHARMACY MARKET: 2011 RESULTS

According to Federal State Statistics Service, as of January 1, 2011 the population of Omsk was estimated as 589.3 mln, which accounts for 0.4% of the total Russian Federation population and 3.1% of Siberian FO (SFO). According to Federal State Statistics Service's data, in 2011 the average salary in the city was RUB 22,778.7 (USD 775.31), which is 4% lower than the average salary in Russia (RUB 23,693.1).

According to the results of the Retail Audit of OTC drugs in Russian Federation™, in twelve months of 2011 the Irkutsk pharmacy market volume in physical terms reduced by 5% to 18.164 million packs (Fig. 1) In wholesale prices, the market also showed the positive performance - 12% in terms of roubles and 15% in terms of dollars and reached 2.203 billion roubles (USD 74.733 million). The region share accounted for 0.7% of the total volume of all-Russia pharmacy market. The average cost of OTC pack in Irkutsk pharmacies in the analyzed period was USD 5.77 (in 2010 - USD 4.68). In 2011, per capita expenses of Irkutsk residents for purchase of medicines in pharmacies amounted to USD 177.96.

Figure 1. Irkutsk pharmacy market for 2010 – 2011

A



t the end of 2011, three companies of the regional top ten drug manufacturers held their own in the ranking (table 1). They were the ranking leaders SANOFI-AVENTIS (+19%) and BAYER (+7%), as well as STADA (+11%) placed at number 8. Four manufacturers from the top ten rose in the ranks. SANDOZ (+14%) moved up one rank, coming in at number 3, displacing SERVIER (+4%) down to number 4. NOVARTIS (+26%) moved up to rank 5 from 8, forcing GEDEON RICHTER (+8%) down. The newcomers of the ranking PFIZER and MERCK SHARP DOHME (+23% each) broke in the ranks, coming in at numbers seven and ten, whereas MENARINI (+4%) moved down one rank. The total share of the top 10 manufacturers increased from 37.8% to 38.4%.

Table 1. The top 10 drug manufacturers by pharmacy sales

Rank		Drug manufacturer*	Share in total pharmacy sales, %	
2011	2010		2011	2010
1	1	**SANOFI-AVENTIS**	6,2	5,8
2	2	**BAYER HEALTHCARE**	4,8	5,0
3	4	**SANDOZ GROUP**	4,0	4,0
4	3	**SERVIER**	3,7	4,0
5	8	**NOVARTIS**	3,7	3,3
6	5	**GEDEON RICHTER**	3,3	3,4
7	11	**PFIZER**	3,3	3,0
8	7	**MENARINI**	3,1	3,4
9	9	**STADA**	3,1	3,2
10	13	**MERCK SHARP DOHME**	3,1	2,8
Total			38,4	37,8

*AIPM members are in bold

Based on the results of the year, the leader of the top ten trade names ranking changed for CYCLOFERON (table 2). ARBIDOL which used to top the Top-10 ranking reduced its sales by 11% and moved down to rank two. ESSENTIALE N (+3%) held its rank three. LASOLVAN (+53%) and LAVOMAX (+39%) moved up to ranks 4 and 5, whereas GONAL-F (-6%) and OCILLOCOCCINUM (+13%) that held those ranks earlier moved down to numbers 6 and 8, respectively. Two newcomers broke in the Top-10 ranking: PENTAXIM (2.7-fold growth in sales) and CIALIS (1.7-fold growth), coming in at numbers 7 and 9. At the same time, VIAGRA (+13%) moved down to the bottom rank of the top ten.

Table 2. The top 10 trade names by pharmacy sales

Rank		Trade Name	Share in total pharmacy sales, %	
2011	2010		2011	2010
1	2	CYCLOFERON	1,3	1,2
2	1	ARBIDOL	1,0	1,3
3	3	ESSENTIALE N	1,0	1,0
4	8	LASOLVAN	0,9	0,7
5	6	LAVOMAX	0,8	0,7
6	4	GONAL-F	0,8	0,9
7	44	PENTAXIM	0,7	0,3
8	5	OCILLOCOCCINUM	0,7	0,7
9	20	CIALIS	0,7	0,5
10	7	VIAGRA	0,7	0,7
Total			8,5	7,9

One newcomer broke into the Top ten INN and generic names ranking - TILORONE (+38%) moved up from number 14 to 8 (table 3). Apart from them, another three names rose in the ranks. They were XYLOMETAZOLINE (+35%), ACRIDOACETIC ACID (+20%) and AMBROXOL (+42%), coming in at three top ranks. At the same time, ARBIDOL (-11%), KETOPROFEN (+9%), AZITHROMYCIN (+12%) and BISOPROLOL (+7%) fell in the ranks. INN PHOSPHOLIPIDS (+7%) and PANCREATIN (+5%) held their own numbers 4 and 10, respectively. The total share of the analyzed ranking, as well as of the above ranking increased from 10.1% to 10.3%.

Table 3. The top 10 INN and Generic Names by pharmacy sales

Rank		INN/Generic Name	Share in total pharmacy sales, %	
2011	2010		2011	2010
1	2	XYLOMETAZOLINE	1,5	1,2
2	3	ACRIDOACETIC ACID	1,3	1,2
3	9	AMBROXOL	1,1	0,9
4	4	PHOSPHOLIPIDS	1,1	1,1
5	1	ARBIDOL	1,0	1,3
6	5	KETOPROFEN	1,0	1,0
7	6	AZITHROMYCIN	0,9	0,9
8	14	TILORONE	0,9	0,8
9	7	BISOPROLOL	0,9	0,9
10	10	PANCREATIN	0,8	0,8
Total			10,3	10,1

No newcomers broke into the ranks of the top 10 ATC groups ranking, its structure remained stable; however, it underwent numerous shifts (table 4). Groups L03 Immunostimulants (+29%) and C09 Agents acting on the rennin-angiotensing system (+9%) moved up one rank, coming in at numbers 2 and 9, respectively. R05 Cough and cold preparations (+23%) moved up from rank 9 to 5. At the same time, groups J01, A11 and N02, as well as preparations of unidentified pharmaceutical groups moved down to the lower ranks. G03 Sex hormones (+13%), M01 Anti-inflammatory and antirheumatic products (+15%) and R01 Nasal preparations (+11%) held their own in the ranking, numbers one, four and seven. The total share of the analyzed top 10 ATC groups slightly increased and accounted for 39.6%.

Table 4. The top 10 ATC Groups by pharmacy sales

Rank		ATC code	ATC group	Share in total pharmacy sales, %	
2011	2010			2011	2010
1	1	G03	SEX HORM&MODULAT GENITAL SYS	6,0	6,0
2	3	L03	IMMUNOSTIMULANTS	4,9	4,3
3	2	J01	ANTIBACTERIALS FOR SYST USE	4,6	4,7
4	4	M01	ANTIINFLAM & ANTIRHEUM PROD	4,0	3,8
5	9	R05	COUGH AND COLD PREPARATIONS	3,6	3,3
6	5		Unidentified	3,5	3,7
7	7	R01	NASAL PREPARATIONS	3,4	3,5
8	6	A11	VITAMINS	3,4	3,6
9	10	C09	AG ACT RENIN-ANGIOTENS SYST	3,1	3,2
10	8	N02	ANALGESICS	3,1	3,3
Total				39,6	39,4

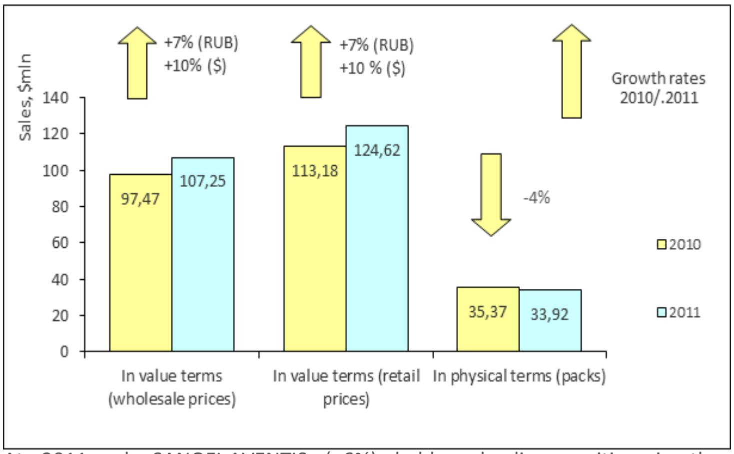
Conclusion. At 2011-end, the Irkutsk pharmacy market brought in 3.092 billion roubles (USD 104.871 million) in final consumption prices, which is by 14% in terms of roubles and 18% in terms of dollars higher than during the same period a year ago. In physical terms, the city market also showed negative growth rates (-5%) and reached 18.164 mln packs. The average cost of an OTC pack (USD 5.77) increased as compared to a year earlier (USD 4.68) and was considerably higher than an average cost in Russia (USD 3.48). Expenses of residents for purchase of medicines in the city pharmacies also proved to be higher than the average expenses in Russia (USD 177.96 vs. USD 111.01).

CHELYABINSK PHARMACY MARKET: 2011 RESULTS

According to Federal State Statistics Service, as of January 1, 2011 the population of Chelyabinsk was estimated as 1.131 mln, which accounts for 0.8% of the total Russian Federation population and 9.4% of Ural FO (UFO). According to Federal State Statistics Service's data, in 2011 the average salary in the region was RUB 20,238.2 (USD 688.84), which is 15% lower than the average salary in Russia (RUB 23,693.1).

According to the results of the Audit of OTC drugs in Russian Federation™, in 2011 the Chelyabinsk pharmacy market in physical terms saw a 4% decline to 33.920 mln packs. In value terms, the sales volume increased 7% in terms of roubles and 10% in terms of dollars and reached RUB 3.153 bln (USD 107.253 mln) in wholesale prices. The average cost of an OTC drug in the city pharmacies increased as compared to a year earlier and amounted to USD 3.67 (in 2010 - USD 3.20). The regional market's share in value terms accounted for 0.8% of the Russian pharmacy market. Per capita expenses for purchase of medicines in pharmacies amounted to USD 110.18

Figure 1. Chelyabinsk pharmacy market for 2010 – 2011



At 2011-end, SANOFI-AVENTIS (+6%) held a leading position in the Chelyabinsk pharmacy market (table 1). SERVIER, ABBOTT (-1% each) and TEVA (+7%) also held their own in the ranking. Three drug makes managed to rise in the ranks. The Russian PHARMSTANDART (+6%) moved up from rank 3 to 2, the Swiss SANDOZ (+7%) – from rank 7 to 5 and the only newcomer of the top ten RECKITT BENCKISER (+38%) – from rank 12 to 9. At the same time, BAYER (+0.1%), MENARINI (-4%) and GEDEON RICHTER (-0.2%) moved down to the lower ranks three, seven and ten, respectively. The total share of the top 10 manufacturers reduced from 38.4% to 37.6%.

Table 1. The top 10 drug manufacturers by pharmacy sales

Rank		Drug manufacturer*	Share in total pharmacy sales, %	
2011	2010		2011	2010
1	1	**SANOFI-AVENTIS**	5,8	5,8
2	3	PHARMSTANDART	4,6	4,6
3	2	**BAYER HEALTHCARE**	4,5	4,7
4	4	**SERVIER**	3,4	3,7
5	7	**SANDOZ GROUP**	3,4	3,4
6	6	**ABBOTT**	3,4	3,6
7	5	**MENARINI**	3,3	3,6
8	8	**TEVA**	3,2	3,2
9	12	**RECKITT BENCKISER**	3,1	2,4
10	9	**GEDEON RICHTER**	3,0	3,2
Total			37,6	38,4

*AIPM members are in bold

Due to high sales rates, three newcomers – ophthalmologic M-cholinolytic TROPICAMID (3.6-fold growth in sales), antiplatelet medication PLAVIX (2.1-fold growth) and chondroprotector ALFLUTOP (3.6-fold increase in sales) - broke into the ranks of the top ten trade names ranking, coming in at numbers 2, 6 and 8, respectively. At the same time, five names moved down to the lower ranks. They were ARBIDOL (-3%), ESSENTIALE N (-11%), VIAGRA and CONCOR (-9% each), as well as HEPTRAL (+8%), coming in at numbers 3, 5, 7, 9 and 10. NUROFEN PLUS (+57%) remained the leader of the ranking. Due to high sales rates, it reinforced its position by expanding its market share. The total share of the Top 10 notably increased as well and reached 9.7%.

Table 2. The top 10 trade names by pharmacy sales

Rank		Trade Name	Share in total pharmacy sales, %	
2011	2010		2011	2010
1	1	NUROFEN PLUS	2,3	1,6
2	17	TROPICAMID	1,5	0,4
3	2	ARBIDOL	1,2	1,3
4	4	ACTOVEGIN	0,8	0,9
5	3	ESSENTIALE N	0,8	1,0
6	28	PLAVIX	0,8	0,4
7	5	VIAGRA	0,6	0,7
8	12	ALFLUTOP	0,6	0,5
9	6	CONCOR	0,6	0,7
10	8	HEPTRAL	0,6	0,6
Total			9,7	8,0

Composition IBUPROFEN + CODEINE (+57%) corresponding to the trade name NUROFEN PLUS held its leading position in the top INN and generic names ranking (table 3). Due to 3.6-fold growth in sales, a newcomer of the top ten TROPICAMIDE moved up to rank two, displacing ARBIDOL (-3%) and BISOPROLOL (-0.3%) down one rank. The second newcomer CLOPIDOGREL (+79%) moved up from rank 25 to 6. Apart from them, INN XYLOMETAZOLINE (+21%) also rose in the ranks, moving up from rank 7 to 5. The names from the higher ranks moved down to four bottom numbers of the top ten ranking. They were PHOSPHOLIPIDS (-7%), BLOOD (-1%), AZITHROMYCIN (+12%) and PANCREATIN (+2%).

Table 3. The top 10 INN and Generic Names by pharmacy sales

Rank		INN/Generic Name	Share in total pharmacy sales, %	
2011	2010		2011	2010
1	1	IBUPROFEN + CODEINE	2,3	1,6
2	38	TROPICAMIDE	1,5	0,4
3	2	ARBIDOL	1,2	1,3
4	3	BISOPROLOL	1,0	1,1
5	7	XYLOMETAZOLINE	1,0	0,8
6	25	CLOPIDOGREL	0,9	0,6
7	4	PHOSPHOLIPIDS	0,9	1,1
8	5	BLOOD	0,9	1,0
9	8	AZITHROMYCIN	0,9	0,8
10	6	PANCREATIN	0,8	0,9
Total			11,5	9,6

Due to 1.5-fold growth in sales, one newcomer S01 Ophthalmologicals broke into the ranks of the top ten ATC groups, coming in at number five (table 4). The markets of the top ten leader N02 Analgesics (+20%) and group R05 Cough and cold preparations (+23%) also developed at a fast pace, which moved up from rank 8 to 7. At the same time, the less dynamic groups of the top ten – C09 Agents acting on the rennin-angiotenzin system (+5%), A11 Vitamins (+3%) and preparations of unidentified pharmaceutical groups moved down to ranks 6, 8 and 10, respectively. The other ATC groups (M01, G03, J01 and R01) held their own in the ranking. The total share of Top ten ATC group ranking increased by over 1 p.p. and achieved 39.5%.

Table 4. The top 10 ATC Groups by pharmacy sales

Rank		ATC code	ATC group	Share in total pharmacy sales, %	
2011	2010			2011	2010
1	1	N02	ANALGESICS	5,8	5,2
2	2	M01	ANTIINFLAM & ANTIRHEUM PROD	4,4	4,5
3	3	G03	SEX HORM&MODULAT GENITAL SYS	4,3	4,4
4	4	J01	ANTIBACTERIALS FOR SYST USE	4,1	4,3
5	11	S01	OPHTHALMOLOGICALS	4,0	2,9
6	5	C09	AG ACT RENIN-ANGIOTENS SYST	3,9	4,0
7	8	R05	COUGH AND COLD PREPARATIONS	3,6	3,2
8	6	A11	VITAMINS	3,3	3,5
9	9	R01	NASAL PREPARATIONS	3,1	3,1
10	7		Unidentified	2,9	3,4
Total				39,5	38,3

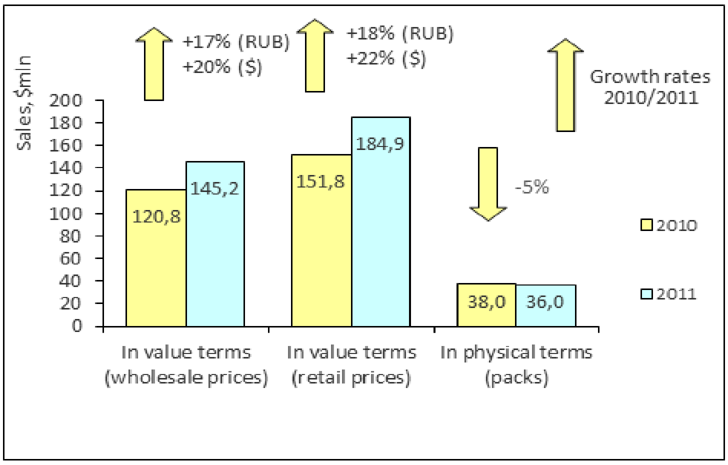
Conclusion. At the end of 2011, the Chelyabinsk pharmacy market performance (in value terms) proved to be pronounced and positive (+7% in terms of roubles and +10% in terms of dollars). At the same time, the market volume reached RUB 3.664 bln (USD 124.624 mln). In physical terms, the market performance reduced by 4% to 33.920 mln packs. The average cost of OTC pack in pharmacies of the city increased as compared to a year earlier (USD 3.67 vs. USD 3.20) and was notably higher than that the average one in Russia (USD 3.48). However, the average medicine expense for residents of the region was slightly lower than the average expenses throughout Russia (USD 110.18 vs. USD 111.01).

YEKATERINBURG PHARMACY MARKET: 2011 RESULTS

According to Federal State Statistics Service, as of January 1, 2011 the population of Yekaterinburg was estimated as 1.387 mln, which accounts for 1.0% of the total Russian Federation population and 11.5% of Ural FO (UFO). According to Federal State Statistics Service's data, the average salary in the region was RUB 22,734.1 (USD 773.80), which is 4% lower than the average salary in Russia (RUB 23,693.1).

According to the results of the Retail Audit of over-the-counter (OTC) drugs in Russian Federation™, in Yekaterinburg the sales of over-the-counter drugs in physical terms reduced by 5% to 35.991 mln packs over the period of twelve months of 2011. In value terms, the city OTC drugs market (exclusive of Beneficiary Drug Coverage) saw a 17% increase in terms of roubles and 20% increase in terms of dollars compared to the same period a year ago and reached RUB 4.279 bln (USD 145.184 mln) in wholesale prices (Fig.1). The region share accounted for 1.2% of the total volume of all-Russia pharmacy market. The average cost of an OTC pack grew as compared to a year earlier (USD 4.00) and reached USD 5.14 in retail prices. In 2011, the Vladivostok consumers spent USD 133.38 on drugs on the average.

Figure 1. Yekaterinburg pharmacy market for 2010 – 2011



At the end of 2011, one newcomer, NOVARTIS (+35%) broke into the top ten manufacturers ranking, coming in at number eight (table 4). Apart from that, the other three drug makers rose in the ranks: ABBOTT (+28%) and SERVIER (+20%) moved up one rank, coming in at numbers three and seven, respectively. MERCK SHARP DOHME (+32%) also moved up from rank 10 to 5. At the same time, four manufacturers, on the contrary, fell in the ranks. They were PHARMSTANDART (+2%), GEDEON RICHTER (+8%), SANDOZ (+14%) and MENARINI (+2%), moving down to ranks 4, 6, 9 and 10, respectively. SANOFI-AVENTIS (+24%) and BAYER (+27%) maintained their leading positions. The cumulative share of the top ten manufacturers increased from 38.9% to 39.7%.

Table 1. The top 10 drug manufacturers by pharmacy sales

Rank		Drug manufacturer*	Share in total pharmacy sales, %	
2011	2010		2011	2010
1	1	**SANOFI-AVENTIS**	7,2	6,8
2	2	**BAYER HEALTHCARE**	5,3	4,8
3	4	**ABBOTT**	4,6	4,2
4	3	PHARMSTANDART	4,1	4,7
5	10	**MERCK SHARP DOHME**	3,3	2,9
6	5	**GEDEON RICHTER**	3,2	3,4
7	8	**SERVIER**	3,2	3,1
8	12	**NOVARTIS**	3,0	2,6
9	7	**SANDOZ GROUP**	3,0	3,1
10	6	**MENARINI**	2,8	3,2
Total			39,7	38,9

*AIPM members are in bold

Preparations ARBIDOL (-10%), ESSENTIALE N (+23%) and HEPTRAL (+52%) didn't change their leading positions in the Top-10 trade names ranking, holding the first three ranks (table 2). From the other drugs of the top ten, most of the trade names rose in the ranks. Only LINEX (+4%) and PARIET (+26%) moved down to the bottom ranks of the Top ten. PLAVIX (+90%) and DETRALEX (+49%) moved up to ranks 4 and 5. The newcomers broke into the top ten ranking, coming in at numbers 6 through 8 - URSOSAN (+50%), ALFLUTOP (+55%) and YARINA (+61%). The cumulative share of Top-ten increased by almost 1 p.p. and achieved 8.7%.

Table 2. The top 10 trade names by pharmacy sales

Rank		Trade Name	Share in total pharmacy sales, %	
2011	2010		2011	2010
1	1	ARBIDOL	1,3	1,7
2	2	ESSENTIALE N	1,3	1,2
3	3	HEPTRAL	1,1	0,9
4	8	PLAVIX	1,0	0,6
5	10	DETRALEX	0,7	0,6
6	13	URSOSAN	0,7	0,6
7	17	ALFLUTOP	0,7	0,5
8	20	YARINA	0,6	0,5
9	4	LINEX	0,6	0,7
10	9	PARIET	0,6	0,6
Total			8,7	7,8

Three newcomers broke into the top 10 INN and generic names ranking as well (table 3). They were URSODEOXYCHOLIC ACID (+70%) and HYALURONIC ACID (+58%), as well as the composition DIOSMIN + HESPERIDIN (+46%), which moved to ranks 7 through 9. INN PHOSPHOLIPIDS (+24%) also moved up to a higher rank and became the leader of the top ten. On top of that, ADEMETIONINE (+53%) and CLOPIDOGREL (+85%) moved up to numbers 4 and 5, respectively. At the same time, they displaced the less dynamic ARBIDOL (-10%), PANCREATIN (+6%) XYLOMETAZOLINE (+38%) and FLUCONAZOLE (+5%) to numbers two, three, six and ten, respectively. The total share of Top-10 INN and generic names increased by 1 p.p. and accounted for 10.5%.

Table 3. The top 10 INN and Generic Names by pharmacy sales

Rank		INN/Generic Name	Share in total pharmacy sales, %	
2011	2010		2011	2010
1	3	PHOSPHOLIPIDS	1,3	1,3
2	1	ARBIDOL	1,3	1,7
3	2	PANCREATIN	1,3	1,4
4	5	ADEMETIONINE	1,2	0,9
5	10	CLOPIDOGREL	1,1	0,7
6	4	XYLOMETAZOLINE	1,1	0,9
7	12	URSODEOXYCHOLIC ACID	0,9	0,6
8	20	HYALURONIC ACID	0,8	0,6
9	17	DIOSMIN + HESPERIDIN	0,8	0,6
10	6	FLUCONAZOLE	0,7	0,8
Total			10,5	9,5

G03 Sex hormones (+34%) became the best-selling group in the region and displaced the last year leader N02 Analgesics (+12%) down one rank (table 4). A 11 (+8%) held its rank three, but due to low growth rates reduced its market share. Apart from the above, two more shifts took place in the Top-10 ranking. The more dynamic M01 Anti-inflammatory and antirheumatic products (+16%) and N06 Psychoanaleptics (+28%) moved up one rank, to numbers 4 and 6, by displacing groups J01 and C09 down one rank. R05 Cough and cold preparations (+19%), A05 Bile and liver therapy (+21%) and R01 Nasal preparations (+20%) held their three bottom ranks in the top ten, The cumulative share of the top 10 pharmaceutical groups didn't change and accounted for 37.3%.

Table 4. The top 10 ATC Groups by pharmacy sales

Rank		ATC code	ATC group	Share in total pharmacy sales, %	
2011	2010			2011	2010
1	2	G03	SEX HORM&MODULAT GENITAL SYS	4,9	4,3
2	1	N02	ANALGESICS	4,2	4,4
3	3	A11	VITAMINS	3,9	4,3
4	5	M01	ANTIINFLAM & ANTIRHEUM PROD	3,8	3,8
5	4	J01	ANTIBACTERIALS FOR SYST USE	3,7	4,2
6	7	N06	PSYCHOANALEPTICS	3,6	3,3
7	6	C09	AG ACT RENIN-ANGIOTENS SYST	3,4	3,6
8	8	R05	COUGH AND COLD PREPARATIONS	3,3	3,2
9	9	A05	BILE AND LIVER THERAPY	3,2	3,1
10	10	R01	NASAL PREPARATIONS	3,2	3,1
Total				37,3	37,2

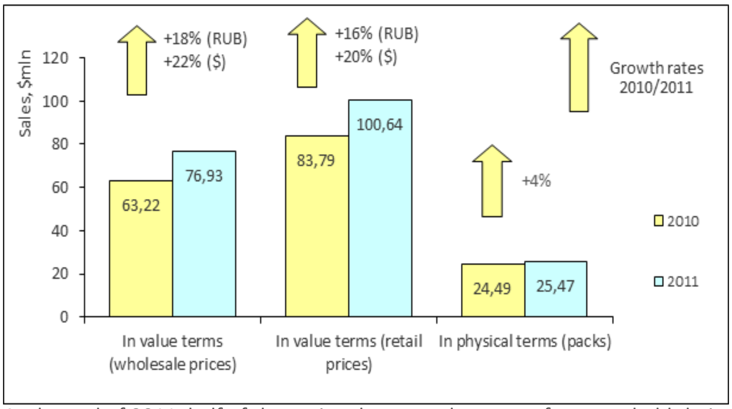
Conclusion. At the end of 2011, the retail OTC drugs market of Yekaterinburg brought in RUB 5.450 bln (USD 184.936 mln). The market saw a 18% increase in terms of roubles and 22% increase in terms of dollars. In physical terms, the city market showed negative sales growth rates (-5%) and reached 35.991 mln packs. The average cost of a pack at the end of twelve months of 2011 was markedly higher than the same indicator a year ago (USD 5.14 vs. USD 4.00). Both the average cost of an OTC pack and the average sum spent by residents of the city for the purchase of OTC drugs (USD 133.38) were higher than the Russia average (cost of OTC drug – USD 3.48 and average expenses – USD 111.01).

TYUMEN PHARMACY MARKET: 2011 RESULTS

According to Federal State Statistics Service, as of January 1, 2011 the population of Tyumen was estimated as 631.8 ths, which accounts for 0.4% of the total Russian Federation population and 5.2% of Ural FO (UFO). According to Federal State Statistics Service's data, in 2011 the average salary in the region was RUB 42,955.8 (USD 1,462.08), which is 81% higher than the average salary in Russia (RUB 23,693.1).

According to the results of the Retail Audit of OTC drugs in Russian Federation™, in twelve months of 2011 the Tyumen pharmacy market volume in physical terms increased by 4% to 25.465 million packs (Fig. 1) In wholesale prices, the market also showed the positive performance - 18% in terms of roubles and 22% in terms of dollars and reached 2.262 billion roubles (USD 76.931 million). The region share accounted for 0.6% of the total volume of all-Russia pharmacy market. Following the results of the analyzed period, the average cost of OTC pack was USD 3.95 (in 2010 - USD 3.42). In 2011, per capita expenses of Tyumen residents for purchase of medicines in pharmacies amounted to USD 159.29.

Figure 1. Tyumen pharmacy market for 2010 – 2011



At the end of 2011, half of the regional top ten drug manufacturers held their own in the ranking (table 1). They were the top five leaders: SANOFI-AVENTIS (+13%), PHARMSTANDART (+16%), BAYER (+8%), ABBOTT (+13%) and MENARINI (+10%). The bottom part of the top ten underwent numerous shifts. At the same time, three manufacturers rose in the ranks. SANDOZ (+22%) moved up from rank 8 to 6, whereas NOVARTIS (+31%) and GEDEON RICHTER (+24%) moved up one rank, coming in at two bottom numbers of the top ten. At the same time, SERVIER (10%) and NYCOMED (+15%) moved down one rank, to numbers 7 and 8. The total share of the top 10 manufacturers reduced by almost 1 p.p. and accounted for 38.1%.

Table 1. The top 10 drug manufacturers by pharmacy sales

Rank		Drug manufacturer*	Share in total pharmacy sales, %	
2011	2010		2011	2010
1	1	**SANOFI-AVENTIS**	5,8	6,0
2	2	PHARMSTANDART	5,1	5,2
3	3	**BAYER HEALTHCARE**	3,8	4,2
4	4	**ABBOTT**	3,6	3,8
5	5	**MENARINI**	3,4	3,6
6	8	**SANDOZ GROUP**	3,4	3,3
7	6	**SERVIER**	3,4	3,6
8	7	**NYCOMED**	3,3	3,4
9	10	**NOVARTIS**	3,2	2,9
10	11	**GEDEON RICHTER**	3,1	2,9
Total			38,1	39,0

*AIPM members are in bold

The same situation is observed in the top ten trade names ranking – the top five names remained unchanged, whereas the bottom part of it underwent numerous shifts and acquired one newcomer (table 2). Antiviral ARBIDOL (+9%), co-formulated analgesic NUROFEN PLUS (+17%), metabolic preparation ACTOVEGIN (+6%), hepatoprotector ESSENTIALE N (+2%) and gestagen DUPHASTON (+11%) held their leading positions in the top ten ranking. LASOLVAN (+47%) moved up from rank ten to six, displacing VIAGRA (+4%) down one rank. Due to 1.7-fold growth in sales, a newcomer of the top ten SYMBICORT TURBUHAL broke into the ranks of the top ten, coming in at number eight. ALFLUTOP (+17%) and HEPTRAL (+12%) moved down to the bottom ranks of the top ten.

Table 2. The top 10 trade names by pharmacy sales

Rank		Trade Name	Share in total pharmacy sales, %	
2011	2010		2011	2010
1	1	ARBIDOL	1,9	2,0
2	2	NUROFEN PLUS	1,1	1,1
3	3	ACTOVEGIN	0,9	1,0
4	4	ESSENTIALE N	0,9	1,0
5	5	DUPHASTON	0,8	0,8
6	10	LASOLVAN	0,7	0,6
7	6	VIAGRA	0,7	0,8
8	19	SYMBICORT TURBUHAL	0,7	0,5
9	7	ALFLUTOP	0,6	0,7
10	8	HEPTRAL	0,6	0,6
Total			8,8	9,1

Two newcomers broke into the ranks of the top ten INN and generic names ranking (table 3). They were AMBROXOL (+48%) and IBUPROFEN (+26%), which moved up to ranks 5 and 10, respectively. XYLOMETAZOLINE (+40%) also moved up to a higher rank, coming in at number two from six. Six INNs of the top-10 fell in the ranks. They were the composition IBUPROFEN + CODEINE (+17%), as well as INN PANCREATIN (+10%), BLOOD (+7%), PHOSPHOLIPIDS (+4%), KETOPROFEN (+12%) and AZITHROMYCIN (+17%). ARBIDOL (+9%) remained the leader of the ranking. The total share of the analyzed ranking, as well as of the above rankings reduced and accounted for 10.6%.

Table 3. The top 10 INN and Generic Names by pharmacy sales

Rank		INN/Generic Name	Share in total pharmacy sales, %	
2011	2010		2011	2010
1	1	ARBIDOL	1,9	2,0
2	6	XYLOMETAZOLINE	1,2	1,0
3	2	IBUPROFEN + CODEINE	1,1	1,1
4	3	PANCREATIN	1,0	1,1
5	11	AMBROXOL	1,0	0,8
6	5	BLOOD	1,0	1,1
7	4	PHOSPHOLIPIDS	1,0	1,1
8	7	KETOPROFEN	0,9	0,9
9	8	AZITHROMYCIN	0,8	0,8
10	13	IBUPROFEN	0,8	0,7
Total			10,6	10,7

The top three ATS groups in the top ten ranking held their own (table 4). They were the groups N02 Analgesics (+21%) and J01 Antibacterials for systemic use (+14%), as well as G03 Sex hormones (+10%), which maintained their first three numbers. R01 Nasal preparations (+22%) and L03 Immunostimulants (+24%) didn't change their ranks either, placed at numbers 8 and 10, respectively. M01 Anti-inflammatory and antirheumatic products (+18%) and R05 Cough and cold preparations (+32%) moved up to numbers four and five, forcing A11 Vitamins and preparations from unidentified pharmaceutical groups to move down. The only newcomer broke into the top-10 ranking – J05 Antivirals for systemic use (+33%) - coming in at number nine. The total share of top ten ATC groups reduced by 0.5 p.p. and achieved 38.7%.

Table 4. The top 10 ATC Groups by pharmacy sales

Rank		ATC code	ATC group	Share in total pharmacy sales, %	
2011	2010			2011	2010
1	1	N02	ANALGESICS	5,0	5,2
2	2	J01	ANTIBACTERIALS FOR SYST USE	4,5	4,6
3	3	G03	SEX HORM&MODULAT GENITAL SYS	4,3	4,6
4	6	M01	ANTIINFLAM & ANTIRHEUM PROD	3,9	3,9
5	7	R05	COUGH AND COLD PREPARATIONS	3,9	3,5
6	5	A11	VITAMINS	3,6	3,9
7	4		Unidentified	3,5	4,1
8	8	R01	NASAL PREPARATIONS	3,5	3,4
9	11	J05	ANTIVIRALS FOR SYSTEMIC USE	3,2	2,9
10	10	L03	IMMUNOSTIMULANTS	3,2	3,0
Total				38,7	39,2

Conclusion. At 2011-end, the Tyumen pharmacy market brought in 2.960 billion roubles (USD 100.636 million) in final consumption prices, which is by 16% in terms of roubles and 20% in terms of dollars higher than the same indicator during the same period a year ago. In physical terms, the city market also showed positive sales growth rates (+4%) and reached 25.465 mln packs. The average cost of an OTC pack (USD 3.95) increased as compared to a year earlier (USD 3.42) and was higher than an average cost in Russia (USD 3.48). Expenses of residents for purchase of medicines in the city pharmacies also proved to be higher than the average expenses in Russia (USD 159.29 vs. USD 111.01).

RUSSIAN FEDERATION REGIONAL HOSPITAL MARKETS: 2011 RESULTS

According to the results of the Hospital Purchase Audit in Russian Federation™, at 2011-end, 11 regional markets taken individually accounted for 49.4% of the entire hospital sector of Russian Federation, which is as much as in the year-earlier period (49.3%). The biggest market is the market of Moscow which share accounts for 25.3% of hospital purchases (Fig. 1). Further follow the markets of Saint Petersburg (6.1%), Kazan (3.9%) and Nizhny Novgorod (2.6%). The regional markets considerably differ by average cost of a hospital OTC pack. The highest price of hospital OTC pack was registered in Kazan (USD 6.54) and the lowest one - in Novosibirsk (USD 2.31) In Moscow, the average cost of a pack was USD 6.19, in St. Petersburg – USD 4.57. Note that in the year earlier period, the most expensive hospital drugs were registered in Moscow (USD 6.23).

Figure 1. Regions' share in the total hospital purchase volume in the Russian Federation in 2011.

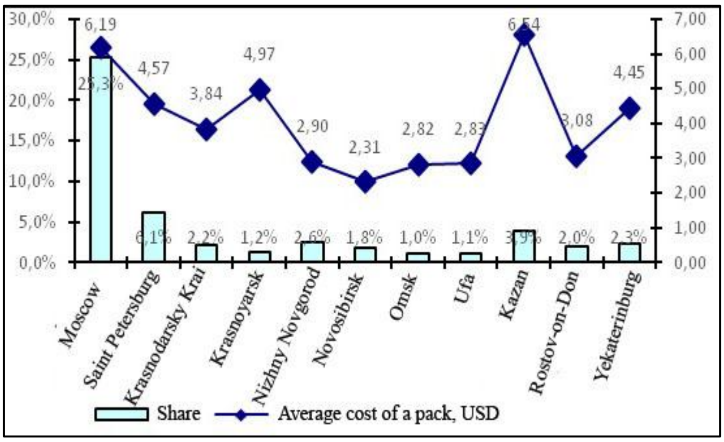


Table 1 provides information of the ranks of the top drug manufacturers in the Russian market which they obtained in the All-Russia rankings. At the year-end, the largest share of the Russian hospital market accounted for the drugs from unidentified manufacturers which take the lead in 6 of 11 regions. The leading company of the Russian hospital sector Sanofi-Aventis ranks 1st in three regional markets: Ufa, Rostov-on-Don and Krasnoyarsk. It ranks 2nd in six regions and 3rd in S-Petersburg. At the same time Sanofi-Aventis ranked 4th in the Kranodarsky Krai. NYCOMED rounding top-three manufacturers ranking broke into the ranks of the top ten in nine regional markets under consideration. NYCOMED ranks 15th in Ufa and 24th in Omsk. The maximum number of "crossings" with the all-Russia list of top manufacturers was observed in Moscow, Krasnodarsky Krai and Krasnoyarsk (7 manufacturers), the minimum number – in Ufa and Omsk (only 4 manufacturers).

Table 1. The top 10 drug manufacturers by hospital purchases (rank in the regional rankings)

Rank in RF top ten	Company	Rank in Regional top tens										
		Moscow	St. Petersburg	Krasnodar sky Krai	Ufa	Kazan	Yekaterinburg	Nizhniy Novgorod	Rostov-on-Don	Novosibirsk	Krasnoyarsk	Omsk
1	Unidentified manuf	1	2	1	8	12	1	1	55	1	2	1
2	SANOFI-AVENTIS	2	3	4	1	2	2	2	1	2	1	2
3	ASTRA ZENECA	3	4	2	15	3	4	10	7	3	4	24
4	NYCOMED	9	9	3	10	5	6	8	4	4	7	14
5	MERCK SHARP DOHME	8	1	6	21	1	14	4	8	8	6	7
6	PFIZER	4	8	9	47	8	7	22	27	16	10	8
7	ROCHE	5	18	5	54	4	10	29	85	41	3	85
8	PHARM-CENTER	49	11	37	7	41	27	20	2	14	21	11
9	BIOTEK	79	57	126	20	23	110	27	18	121	50	50
10	GLAXOSMITH KLINE	12	14	14	36	17	22	31	22	11	22	19

Yet more significant deviations in the regional top 10 rankings were observed with a breakdown of individual trade names (Table 2). However, in nine regions under review the leader of all-Russia hospital market Sodium Chloride takes the top position in the regional ranking. And only in Krasnodarsky Krai it ranks 21st. Heparin, which ranks 2nd in the general ranking, takes the same rank only in Krasnodarsky Krai. In Yekaterinburg, it ranks 3rd, in Novosibirsk – 4th, in St. Petersburg – 5th. However, in six regions this preparation didn't break into the top-10 rankings, coming in at the top 20 and even top 30 rankings. At the same time, Clexane ranked 3rd in three regions didn't broke into the regional Top-10 rankings, however it ranked 2nd in three cases. Note, that in Yekaterinburg the leader of the regional market (AMPISID) didn't break into the all-Russia Top-10. The maximum number of "crossings" with the all-Russia list of top trade names was observed in two regions – Rostov-on-Don and Novosibirsk (six positions each).

Table 2. The top 10 trade names by hospital purchases (rank in regional rankings)

Rank in RF top ten	Trade name	Rank in Regional top tens										
		Moscow	St. Petersburg	Krasnodar sky Krai	Ufa	Kazan	Yekaterinburg	Nizhniy Novgorod	Rostov-on-Don	Novosibirsk	Krasnoyarsk	Omsk
1	NATRIUM CHLORIDUM	1	1	21	1	1	4	1	1	1	1	1
2	HEPARIN	11	5	2	11	11	3	7	13	4	24	11
3	CLEXAN	16	10	4	3	2	2	3	2	5	9	13
4	MERONEM	2	4	1	13	3	15	15	8	3	2	N/A
5	ACTOVEGIN	42	52	6	N/A	25	69	12	3	44	25	20
6	GLUCOSE	22	28	11	21	37	6	11	70	2	3	2
7	CEFOTAXIM	69	23	287	23	263	32	24	6	12	54	45
8	TIENAM	18	9	8	30	15	9	8	5	6	11	4
9	TAXOTERE	4	152	60	127	12	N/A	N/A	N/A	N/A	18	48
10	FRAXIPARINE	15	24	65	61	18	132	137	21	30	48	32

Considerable variance in the consumption structure of not only individual drugs and INN groups, but of pharmacotherapeutic groups as well is observed depending on the regions (table 3). However, it should be noted that the leader of all-Russia ranking – group J01 Antibacterials for systemic use topped almost all top 10 regional rankings. The sole exception was Krasnoyarsk where it was ranked 2nd. L01 Antineoplastic agents ranked 3rd in the Top-10 in Russia became the ranking leader of this region. The second group of the All-Russia hospital ranking - B05 Blood substitutes and perfusion solutions – broke into the Top-3 ranking of 11 analyzed regions, being ranked 2nd in six of them. And only in Krasnodarsky Krai it ranked 5th. Starting from rank three, the regional top 10s differ considerably. To the fullest extent Top-10 of all-Russia hospital sector is reproduced in Moscow, St. Petersburg and Krasnodarsky Krai (8 positions match).

Table 3. The top 10 ATC groups by hospital purchases (rank in regional rankings)

Rank in RF top ten	ATC\ code	Rank in Regional top tens										
		Moscow	St. Petersburg	Krasnodar sky Krai	Ufa	Kazan	Yekaterinburg	Nizhniy Novgorod	Rostov-on-Don	Novosibirsk	Krasnoyarsk	Omsk
1	J01	1	1	1	1	1	1	1	1	1	2	1
2	B05	3	2	5	2	3	3	2	2	2	3	2
3	L01	2	5	2	9	2	4	12	50	34	1	4
4	B01	4	4	4	3	4	2	3	3	3	62	3
5	N01	6	6	8	6	7	6	7	11	5	11	6
6	N05	12	3	3	5	5	16	35	42	6	4	30
7	B02	5	11	13	13	11	9	9	5	30	19	25
8	V08	10	8	7	7	6	5	40	4	4	9	5
9	J06	7	10	50	11	13	13	14	22	14	8	16
10	N06	20	13	6	15	15	26	20	7	15	6	10

Conclusion. As comparison of the main rankings shows, the Russian hospital sector is marked by the pronounced regional specificity of market profile. However, in most cases the leaders of all-Russia top 10s get high ranking in the regional hospital markets as well.

REGIONAL DIGEST

Beneficiary Drug Coverage/Procurement of Necessary Drugs, Government Control

April 6, 2012, The Kommersant

The Ministry of Economy to submit the pricing procedure for vital and essential medicines by October 2012

By October, the Ministry of Economy intends to submit a new pricing procedure for manufacturers of vital and essential medicines subject to price controls. The spokesman for the Ministry said that the “work had just begun”, approaches yet to be worked out, didn't sound any particular deadlines for the introduction of a new procedure, but disclosed objectives: introduction of prescription drug coverage. Yesterday at the conference "Public Regulation and Russian Pharmaceutical Industry-2012” Deputy Director of Competition Support Department of Ministry of Economy, Dmitri Ter-Stepanov announced that by October 2012 the Ministry of Economy would present a new pricing procedure for vital and essential medicines.

April 5, 2012, The Kommersant-Online

Ministry of Health to develop the procedure for limiting communication between practitioners and pharmaceutical company representatives

The Ministry is developing and in the short run will present a draft procedure for monitoring enforcement of the Law On Fundamentals of the Russian Federation Legislation on Citizens' Health Protection as it pertains to limitations to be imposed on practitioners and pharmacy workers in their professional activities. Pharmaceutical companies are unhappy with the enforcement of the law: health facilities don’t have any uniform medical representative admittance procedure, each facility stretches the law in its own way. ARPM believes that a relevant statutory instrument should be developed on the basis of such "procedure for admittance of pharmaceutical company, drug maker or medical product distributor representatives to medical workers of health facilities”.

April 11, 2012, The Vedomosti

FAS found 11 pharmaceutical companies guilty of cartel agreement

Federal Anti-Monopoly Service (FAS) established the guilt of major players in the pharmaceutical market of cartel agreement. According to FAS, R-pharm, Apteka-holding, Pharmsintez and other nine drug distributors pegged up prices at public procurement tenders for supply of antituberculous drugs. The Federal Service stressed that bidders didn’t bargain on price and as a result the government contracts were concluded at maximal price with the only bidder or the contract was awarded to a bidder who had made the only price offer. FAS Committee has formed opinion that such conduct of bidders can be interpreted as a crime described in Article 178 of the Criminal Code of the Russian Federation ("avoidance, limitation or elimination of competition”). At present, the Service submitted the case files to Investigative Department of the Ministry of Internal Affairs.

April 17, 2012, The Rossiyskaya Gazeta

FAS prepared amendments to the Law On Circulation of Medicines

By instruction of the Government, the Federal Anti-Monopoly Service has carried out inspections in order to see whether the Law On Circulation of Medicines was complied with and proposed a package of amendments. Timofey Nizhegorodtsev, who heads the FAS's Department for Monitoring the Social Sphere and Trade, said: “In respect to the large blocks of amendments, the most important thing is to afford the opportunity for arbitration review of decisions made by authorized body and expert organization. The proposed amendments will remove the asymmetry between the registration authority and market entities; provide entities with opportunities to defend their rights. In our amendments, we provided the detailed description of the procedure for making decisions on conduct of clinical trials, gave it greater clarity, cancelled double applications for permission to conduct CT which are now required by law.

April 20, 2012, The Kommersant

From 2005, the circulation of fake medicines has reduced four times

From 2005, the circulation of fake medicines has reduced almost four times and accounted for 0.02% of the total number of series released to the Russian pharmaceutical market, Acting Head of the Federal Service for the Supervision of Public Health and Social Development Elena Telnova said at the Medicines and Medical Products Quality Conference. Despite a reduction in the number of detected fake and poor quality medicines, in 2011 within the scope of sampling inspection the authority detected more than four times as much poor quality products as compare to 2010.

April 23, 2012, The Izvestia

Government considers a possibility to place seven large pharmaceutical companies under control of the Russian Technologies State Corporation

The Russian Government considers a possibility to place seven large pharmaceutical companies operating as federal state unitary enterprises under control of the Russian Technologies State Corporation. This refers to the monopolist in the sphere of narcotic drugs production - Moscow Endocrine Plant, FSUC SIC Microgen, SIC Pharmzaschita, FSUE Federal Centre of Nuclear Medicine Projects Design and Development and three research institutes – Research Institute for Extra Pure Bio-Preparations, St Petersburg I. Mechnikov Research Institute of Vaccines and Sera and FSUC State Research Center of Organic Products and Colorants (NIOPIK). According to the Izvestia’s data, the Head of Russian Technologies State Corporation Sergey Chemezov applied to the Government for transfer of the above entities as an asset contribution at the end of January this year. Following which Vice-Premier Igor Sechin instructed the authorities concerned to consider the issue and provide the official decision.

April 26, 2012, The Vedomosti

Prescription drug coverage is to be operable from January 1, 2015

The Vedomosti had the run of the Roadmap to Improve Pricing for Medications in 2012-2014 and furthermore. The document was prepared by the Ministry of Economic Development and approved at the meeting held by all authorities concerned. The government will cover the cost of drugs based on the reference prices for preparations with the same INN (practitioners will prescribe drugs to aided persons only on prescription forms and only using INN). Reference prices may be internal and external. Internal reference pricing in covering the cost of drugs operates in many European countries: The government considers the prices for preparations with the same INN used by all drug manufacturers. It estimates the feasibility of a price at which a drug maker intends to sell a drug. To do so, the government compares a cost of the drug in the countries with a comparable health system and level of economic development.

NEWS FROM COMPANIES

April 10, 2012, RIA News

Insulin production at the pharmaceutical factory Sanofi-Aventis in Orlov Region to reach full capacity by 2013

Sanofi-Aventis Russia intends to reach full capacity at its insulin producing plant Sanofi-Aventis Vostok based in the Orlov Region by 2013, General Manager, Moscow Office, Patrick Aghanian said at the press-conference. He stressed that the plant production capacity can completely meet the market demand both for human and analogue insulin. According to Patrick Aghanian, at the present moment the operational production lines may produce up to 30 mln insulin dose units per year

April 16, 2012, ITAR-TASS

Novo Nordisk broke ground on a new insulin plant in Kaluga

Denmark-based Novo Nordisk broke ground on a new high-tech plant in Kaluga that will produce modern insulin for the Russian market. President of the Company Lars Sorensen reported that the plant will be located in Grabtsevo Technopark. According to him, the total investments volume will amount to USD 100mln. The plant will formulate and fill modern insulin into Novo Nordisk’s Penfill cartridges and pack the FlexPen prefilled insulin delivery device for the Russian market. The plant is expected to obtain license in Q3, 2013 and to start manufacturing in 2014.

April 26, 2012, IA Regnum

Novartis to build a plant in St. Petersburg by the end of 2012

Switzerland-based Novartis has started building a new manufacturing site in St. Petersburg on the territory of special economical zone Novoorlovskaya in the Primorsky District of the city. The first construction works were commenced as early as March 23, right after obtaining a planning permission from the Russian control and expert examination authorities. The principal and engineering blocks are expected to be completed by the end of 2012 and the delivery and assembly of equipment to Russia is planned for 2013. The site is be completed by 2014. Novartis press-service says it will invest over USD 90 mln in the construction of the plant in the near 2 years. After obtaining all necessary licenses, the plant is expected to produce nearly 1.5 bln product units per year, both generic and branded drugs. When reaching its full production capacity, the site will create 350 jobs for the Russian specialists.

For any questions and comments please call
Vladimir G. Shipkov, CEO, AIPM
Tel.: 933 70 40
For more information on the AIPM, please, visit our website: http://www.aipm.org
Ekaterina Korduban, Head of PR and Development of Remedium Group
Tel.: 780 34 25, fax: 780 34 26
For more information on the Remedium Group, please, visit our website: http://www.remedium.ru