Ассоциация
Международных
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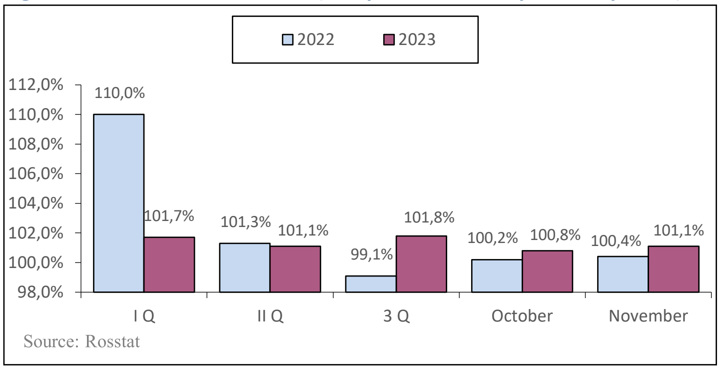
MACROECONOMIC INDICES

Inflation

According to Federal State Statistics Service's data, the Consumer Price Index was estimated as 101.1% in November 2023 compared to the previous month, and 106.6% vs December 2022.

In November 2023, the Producer Price Index for industrial production was 99.9% compared to the previous month and 102.0% in the month-earlier period. The index accounted for 123.0% as against December 2022.

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



Living standard

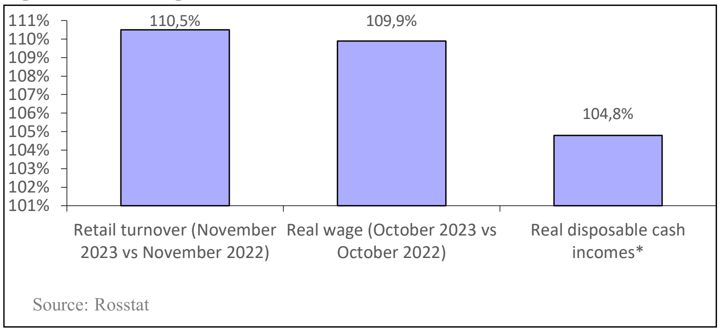
In October 2023, a gross monthly average wage of corporate employees reached RUB 73,830 (USD 761.06). It accounted for 117.2% compared to October 2022, and 103.9% compared to the previous period. In October 2023, the real gross wage accounted for 109.9% as compared to October 2022, and 103.0% against the prior period.

According to estimates[1], real disposable cash incomes accounted for 104.8% in January-September of 2023 relative to January-September of 2022 (Fig. 2).

Retail turnover

In November 2023, the retail turnover was equal to RUB 4195.2 bil. or 110.5% (in comparable prices) against the respective period of the previous year, and RUB 42461.4 bil. or 105.9 % in January - November 2023 (Fig. 2).

Figure 2. Real wage and retail turnover



* January-September 2023 vs. January-September 2022.

Industrial Production

According to Federal State Statistics Service's data, Industrial Production Index in November 2023 accounted for 104.3% as compared to the same period of the previous year and 103.6% in January-November 2023.

According to Federal State Statistics Service's data, Industrial Production Index of drugs and medical products in November 2023 accounted for 109.9% compared to the relevant period of 2022 and 102.3% in January-November 2023. The volume of shipped drugs reached RUB 126.0 bil.

Domestic production

Table 1 provides the Top 10 domestic pharmaceutical manufacturers according to their volumes of sales in all segments of the market based on the results for November 2023.

[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.

Table 1. Top 10 Russian chemical and pharmaceutical manufacturers by sales in November 2023

Rank	Manufacturer	RUB mil.
1	Biocad	4175.3
2	Binnopharm Group	3615.7
3	Stada	3553.4
4	Otcpharm	3243.4
5	Pharmstandard	2707.0
6	Grotex	2271.2
7	Servier	2216.4
8	Valenta	2110.9
9	Vertex	1860.7
10	Atoll	1656.0

Source: IQVIA

Table 2 provides pharmacy sales data from 10 regions of the Russian Federation. In October 2023 compared to September, decline in pharmacy sales (in terms of roubles) was observed in most regions. The most pronounced decline was observed in Krasnodar Krai (-10%), the least one in Rostov Region (-1%). The sales grew in four regions, in Perm - by 27%.

Table 2. Pharmacy sales in the regions, 2023

Region	Pharmacy sales, $ mil. (wholesale prices)			Growth gain, % (roubles)		
	August 2023	September 2023	October 2023	August/July 23	September/ August 23	October/September 23
Moscow	137.0	170.5	166.8	20%	26%	-2%
St. Petersburg	64.3	80.3	72.6	21%	27%	-9%
Krasnodar Krai	63.7	60.9	54.7	32%	-3%	-10%
Krasnoyarsk Krai	23.3	25.8	26.1	15%	12%	2%
Tatarstan	23.8	26.6	26.9	10%	14%	1%
Rostov Region	32.8	33.4	32.8	26%	3%	-1%
Novosibirsk Region	23.6	27.4	25.9	16%	18%	-5%
Voronezh Region	18.8	20.9	19.9	14%	13%	-4%
Perm	6.0	5.9	7.5	10%	0.1%	27%
Tyumen	8.4	8.8	9.0	15%	7%	2%

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 November 2023

Rank	Company*	Amount of broadcasts
1	Evalar	10,107
2	Binnopharm Group	9,459
3	Otcpharm	8,794
4	Renewal Manufacturing Pharmaceutical Company	8,189
5	Materia Medica	7,686

Source - Remedium according to Mediascope's data

Table 4. Top five brands in mass media in November, 2023

Rank	Brand*	Amount of broadcasts
1	Evalar	10,029
2	Renewal	8,189
3	Angidak	2,467
4	Magne B6	2,117
5	Kagocel	1,966

Source - Remedium according to Mediascope's data

* Only drugs registered with the National Medicine Register were considered.

STATE REIMBURSEMENT PROGRAM (DLO) IN THE RUSSIAN FEDERATION: 2023 FIRST NINE MONTHS RESULTS

According to DLO in RF™, the drugs supplies under the Federal Program amounted to RUB 103,560 bil. on the basis of the results for the first nine months of 2023 (USD 1.312 bil.) at contractual prices. The sector volume reduced 4% in terms of roubles, and 14% in terms of dollars as compared to the same period of 2022. The scope of supplies in pack terms increased by 7% to 61.124 mil. packs. The average cost of an FPP pack through the DLO program was USD 21.46 in contractual prices (a year ago it was USD 26.58).

According to the results for the first nine months of 2023, four manufacturers from the ranking in DLO segment showed negative growth rates (Table 1). Among them were GENERIUM (-7%[2]) and ROCHE (-12%), which held ranks one and three. TAKEDA (-24%) and BIOCAD (-46%) that showed a more pronounced decrease in purchases dropped to ranks four and seven. The other manufacturers of the Top 10 showed positive growth rates and almost all of them rose in the ranks. Thus, JOHNSON & JOHNSON (+18%), NOVARTIS (+7%) and OCTAPHARMA (+51%) moved up to ranks two, five and six, and two newcomers, ASTRAZENECA (+92%) and BAYER (+15%), rounded out the Top 10 ranking. And only SANOFI (+8%) moved a point down despite the increase in volumes. The total share of the Top 10 companies in the DLO program increased from 57.7% to 58.1%.

Table 1. The Top 10 drug manufacturers for DLO*

Rank		Manufacturer*	Share in total DLO volume, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	1	GENERIUM CJSC	10.7	11.0
2	4	**JOHNSON & JOHNSON**	9.8	8.0
3	3	**ROCHE**	8.4	9.1
4	2	**TAKEDA**	7.7	9.8
5	6	**NOVARTIS**	4.8	4.3
6	8	OCTAPHARMA	3.9	2.5
7	5	BIOCAD	3.5	6.3
8	7	**SANOFI**	3.5	3.1
9	12	**ASTRAZENECA**	3.3	1.7
10	11	**BAYER**	2.4	2.0
Total			58.1	57.7

*AIPM members are in bold

Two newcomers also broke into the Top 10 brands ranking (Table 2). HEMLIBRA (3.8-fold growth in purchases) and XARELTO (+3%) moved up to the lower ranks of the Top 10 ranking. In addition to them, another six brands from the Top 10 ranking rose in the ranks. Thus, the brands ELIZARIA (+7%), HEMLIBRA (+20%) and DARZALEX (+29%) moved up to ranks one to three, whereas ADVATE and PLEGRIDY (+15% each), as well as TYSABRI (+12%) moved up to ranks five to seven. Two brands with negative rates, OCREVUS (-34%) and UMIFENOVIR (-32%), moved down to the lower ranks four and eight, respectively. The total share of the Top 10 increased by 2.6 p.p. and achieved 28.8%.

Table 2. The Top 10 brands in the DLO segment

Rank in the Top 10		Brand	Share in total DLO volume, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	2	ELIZARIA	5.2	4.6
2	3	HEMLIBRA	4.0	3.2
3	5	DARZALEX	3.6	2.7
4	1	OCREVUS	3.3	4.8
5	7	ADVATE	2.4	2.0
6	8	PLEGRIDY	2.2	1.9
7	9	TYSABRI	2.2	1.9
8	4	ELAPRASE	2.1	2.9
9	34	ELOCTATE	2.0	0.5
10	11	XARELTO	1.8	1.7
Total			28.8	26.2

Following the respective brands, INNs OCRELIZUMAB (-34%) and IDURSULFASE (-32%) also showed negative growth rates and moved down to ranks four and ten in the Top 10 INNs and generic names ranking (Table 3). Its remaining representatives, in contrast, increased both their purchases under the DLO program and their rating positions. Thus, ECULIZUMAB (+7%) moved up to rank number one from three, followed by EMICIZUMAB (+20%) and DARATUMUMAB (+29%). INNs OCTOCOG ALFA and PEGINTERFERON BETA-1A (+15% each) moved up from the bottom ranks to ranks five and seven. Three new representatives, FACTOR VIII (+59%), NATALIZUMAB (+12%) and FACTOR VIII*FACTOR VON WILLEBRAND (+22%) moved up to ranks six, eight and nine. The total share of the Top 10 ranking expanded from 27.1% to 29.5%.

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

Rank in the Top 10		INN/Group name	Share in total DLO volume, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	3	ECULIZUMAB	5.2	4.6
2	5	EMICIZUMAB	4.0	3.2
3	7	DARATUMUMAB	3.6	2.7
4	2	OCRELIZUMAB	3.3	4.8
5	9	OCTOCOG ALFA	2.4	2.0
6	17	FACTOR VIII	2.4	1.4
7	10	PEGINTERFERON BETA-1A	2.2	1.9
8	11	NATALIZUMAB	2.2	1.9
9	14	FACTOR VIII*FACTOR VON WILLEBRAND	2.1	1.7
10	6	IDURSULFASE	2.1	2.9
Total			29.5	27.1

The Top 10 ATC groups showed high stability – eight of its ATC groups held its own in the ranking (Table 4). Its leaders have not changed either: groups L04 Immunosuppressants (-28%), B02 Antihemorrhagics (+11%) and L01 Antineoplastic agents (+13%) held the top three lines despite the pronounced negative growth rates of the former. Groups A16 Other alimentary tract and metabolism products (-24%), B01 Antithrombotic agents (+9%), R03 Drugs for obstructive airway diseases (-4%) and L02 Endocrine therapy (+45%) and B03 Anti-anaemic preparations (+14%) as before held their previous ranks six through ten, respectively. The only shift affected ranks four and five. The group L03 Immunostimulants (-31%) that showed the most pronounced decline in sales moved one rank down, giving way to the more dynamic A10 Drugs used in diabetes (+18%). In sum, the top 10 ATC groups ranking accounted for 84.7% vs 87.4% in the year earlier period.

Table 4. The Top 10 ATC groups in DLO segment

Rank		ATC code	ATC group	Share in total DLO volume, %	
9 mon. 2023	9 mon. 2022			9 mon. 2023	9 mon. 2022
1	1	L04	IMMUNOSUPPRESSANTS	21.1	28.1
2	2	B02	ANTIHEMORRHAGICS	19.4	16.8
3	3	L01	ANTINEOPLASTIC AGENTS	13.5	11.5
4	5	A10	DRUGS USED IN DIABETES	9.7	7.9
5	4	L03	IMMUNOSTIMULANTS	5.7	8.0
6	6	A16	OTHER ALIMENTARY TRACT AND METABOLISM PRODUCTS	5.4	6.9
7	7	B01	ANTITHROMBOTIC AGENTS	3.8	3.4
8	8	R03	DRUGS FOR OBSTRUCTIVE AIRWAY DISEASES	2.3	2.3
9	9	L02	ENDOCRINE THERAPY	2.2	1.4
10	10	B03	ANTIANEMIC PREPARATIONS	1.5	1.2
Total				84.7	87.4

Data on supplies to the Top 10 regions of Russia under the State Reimbursement Program (DLO) are shown in Table 5. The rating completely repeats a year-earlier rating, although negative growth rates were observed in most regions. Including the regions that retained their leadership: Moscow and Moscow region (-4% each), St. Petersburg (-3%). Supplies growth under the program was reported in Tatarstan (+8%), Krasnodar Krai (+5%) and Bashkortostan (+6%). In total, the Top 10 regions accumulated 40.5%, whereas in the year-earlier period they accounted for 40.3%.

Table 5. The Top 10 regions by sales in DLO segment

Rank		Region	Share in total DLO volume, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	1	Moscow	10.8	10.8
2	2	Moscow region	5.3	5.3
3	3	St. Petersburg	4.4	4.3
4	4	Sverdlovsk region	3.2	3.6
5	5	Republic of Tatarstan	3.7	3.3
6	6	Krasnodar Krai	3.4	3.1
7	7	Chelyabinsk region	2.5	2.8
8	8	Rostov region	2.6	2.6
9	9	Novosibirsk region	2.1	2.3
10	10	Republic of Bashkortostan	2.5	2.3
Total			40.5	40.3

Conclusion. In January-September of 2023, the DLO sector brought in RUB 103.560 bil. (USD 1.312 bil.) at contractual prices, which was by 4% in terms of roubles and by 14% in terms of dollars less than in January-September of 2022. In pack terms, the supplies under the program increased by 7% to 61.124 mil. packs. The average cost of FPP included in the DLO Programme considerably decreased as compared to the previous year (USD 21.46 vs USD 26.58).

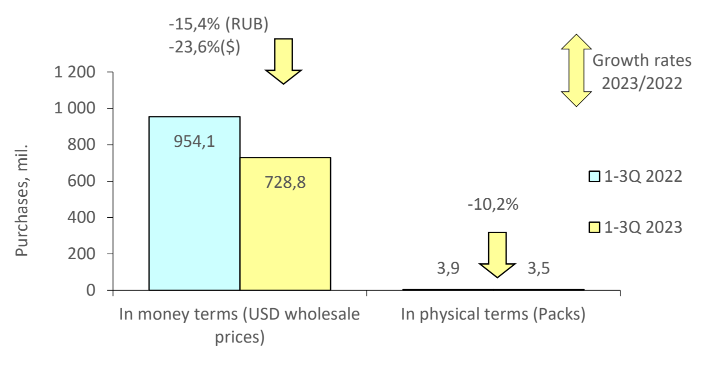
[2] Hereinafter, unless otherwise stated, growth gains are stated in the rouble equivalent or national currency.

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

COST-INTENSIVE NOSOLOGIES (VZN) PROGRAM, 1-3 Q 2023

According to IQVIA, at the end of the first nine months of 2023 the volume of supplies under the VZN program in contract prices amounted to RUB 58.0 bil. (USD 728.8 mil.) (Fig. 1). The purchases saw a 15.4% decrease in terms of national currency and a 23.6% decrease in terms of dollars as compared to the same period of the previous year. In natural terms, the supplies decreased by 10.2% to 3.5 mil. packs.

Figure 1. VZN Program supplies trend in 1-3 Q 2023 vs 1-3 Q 2022*



Compared to the first half of 2022, the largest increase in purchases in terms of roubles was recorded in the groups of drugs to treat haemophilia (+10%), haemolytic-uremic syndrome (+6%) and cystic fibrosis (+3%) and the largest decline in purchases was recorded in the groups of oncohematological drugs (-36%) and drugs used to treat mucopolysaccharidosis (-30%). At the end of the first three months of 2023, the group of drugs to treat haemophilia became the leader in the purchases ranking, the drugs to treat multiple sclerosis 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), %	
		1-3Q 2023	1-3Q 2022
Haemophilia		**34.2**	**26.2**
	EMICIZUMAB	7.1	5.0
	FACTOR VON WILLEBRAND*FACTOR VIII	5.4	4.7
	OCTOCOG ALFA	4.4	3.2
	FACTOR VIII	4.3	2.3
	EFMOROCTOCOG ALFA	3.5	0.8
	MOROCTOCOG ALFA	2.8	2.6
	FACTOR IX	1.8	1.5
	EPTACOG ALFA (ACTIVATED)	1.6	2.2
	SIMOCTOCOG ALFA	1.5	0.7
	FACTOR VIII INHIBITOR BYPASSING FRACTION	1.2	2.6
	NONACOG ALFA	0.6	0.5
Sclerosis Multiplex		**23.4**	**27.0**
	OCRELIZUMAB	5.8	7.5
	PEGINTERFERON BETA-1A	4.0	2.9
	NATALIZUMAB	3.9	2.9
	CLADRIBINE	3.3	1.7
	INTERFERON BETA-1A	2.8	5.5
	INTERFERON BETA-1B	2.3	2.8
	GLATIRAMER ACETATE	1.0	1.2
	ALEMTUZUMAB	0.3	0.7
	TERIFLUNOMIDE	0.1	1.8
Oncohematology		**16.4**	**21.8**
	DARATUMUMAB	6.4	4.2
	RITUXIMAB	2.7	3.5
	LENALIDOMIDE	2.7	10.8
	POMALIDOMIDE	2.2	0.9
	IXAZOMIB	1.7	1.4
	IMATINIB	0.4	0.3
	BORTEZOMIB	0.2	0.5
	FLUDARABINE	0.1	0.1
Hemolytic-uremic syndrome		**9.0**	**7.3**
	ECULIZUMAB	9.0	7.3
Mucopolysaccharidosis type I, II and VI		**6.8**	**8.2**
	IDURSULFASE	3.7	4.6
	GALSULFASE	1.5	2.0
	LARONIDASE	1.2	1.0
	IDURSULFASE BETA	0.4	0.6
Transplantation		**3.1**	**3.1**
	TACROLIMUS	2.1	1.8
	MYCOPHENOLIC ACID	0.5	0.7
	EVEROLIMUS	0.4	0.4
	MYCOPHENOLATE MOFETIL	0.1	0.1
	CICLOSPORIN	0.0	0.1
Systemic-onset juvenile arthritis		**2.6**	**2.4**
	CANAKINUMAB	2.3	1.9
	TOCILIZUMAB	0.3	0.5
	ADALIMUMAB	0.0	0.0
	ETANERCEPT	0.0	0.0
Mucoviscidosis		**2.2**	**1.8**
	DORNASE ALFA	2.2	1.8
Gaucher disease		**1.9**	**1.9**
	IMIGLUCERASE	1.1	1.2
	VELAGLUCERASE ALFA	0.8	0.8
	TALIGLUCERASE ALFA	0.0	0.0
Pituitary dwarfism		**0.3**	**0.3**
	SOMATROPIN	0.3	0.3

* Here and elsewhere IQVIA's data are used

Just like in the previous periods, Generium held its previous rank number one in the Top 10 manufacturers ranking (Table 3). Elizaria (Eculizumab) (+6%) to treat atypical haemolytic uremic syndrome remains the leading drug of the company. Elizaria moved up to rank one in the top ten brands ranking (Table 2). J&J moved up to rank two from five in the manufacturers ranking (Table 3) (+20% grow in sales). All three J&J drugs broke into the Top 10 brands ranking: oncohematological drug Darzalex (Daratumumab) moved from rank 6 to 3 (+29%), the drugs for the treatment of multiple sclerosis Plegridy (Peginterferon beta-1a) and Tysabri (Natalisumab) with an increase in sales of +15% and +12% moved up to ranks 6 and 7, respectively (Table 2). Due to a 25% decline in sales in the first nine months of 2023, Takeda Corporation moved from rank 2 to 3 in the manufacturers ranking (Table 3). Two brands of the company Advate (Octocog Alfa) intended for the treatment of haemophilia (Table 2) and Elaprase (Idursulfase) for the treatment of mucopolysaccharidosis broke into the Top 10 ranking. - decline in total sales (-15%), Roche held its previous rank three in the manufacturers ranking (Table 3). The company's major sales were boosted by the immunomodulator Hemlibra (Emicizumab) for the treatment of haemophilia A and by Ocrevus (Ocrelizumab) for the treatment of multiple sclerosis. Both drugs held high positions in the brands ranking: Hemlibra maintained rank two, Ocrevus — rank four (Table 2). Due to a significant increase in purchases of another drug to treat haemophilia Vilate (Factor von Willebrand* Factor VIII) allowed Octapharma to move up from rank 7 to 5 in the manufacturers ranking.

Table 2. Top 10 brand names by purchases under the VZN Program

Rank in the Top 10		Brand	Share in total VZN supplies, %	
1-3Q 2023	1-3Q 2022		1-3Q 2023	1-3Q 2022
1	3	ELIZARIA	9.0	7.3
2	4	HEMLIBRA	7.1	5.0
3	6	DARZALEX	6.4	4.2
4	2	OCREVUS	5.8	7.5
5	8	ADVATE	4.4	3.2
6	10	PLEGRIDY	4.0	2.9
7	9	TYSABRI	3.9	2.9
8	5	ELAPRASE	3.7	4.6
9	33	ELOCTATE	3.5	0.8
10	20	MAVENCLAD	3.3	1.7
Total			51.1	52.3

Biocad (+15%) held its previous rank 6 in the Top 10 manufacturers ranking (Table 3) despite reduction in sales (-53%). None of the company's drugs were included in the Top 10 trade name ranking. Over two-fold increase in purchases of the drug to treat haemophilia Eloctate (Efmoroctocog alfa) allowed Swedish Orphan Bio to move up to rank seven in the manufacturers ranking, and Eloctate to move from rank 33 to 9 in the brands ranking (Table 2). 66% increase in purchases of the drug to treat multiple sclerosis, Mavenclad (Cladribine), allowed Merck to move up to rank seven in the manufacturers ranking, and Mavenclad to move from rank 20 to 10 in the brands ranking (Table 2).

Table 3. Top 10 manufacturers by purchases under the VZN Program

Rank in the Top 10		Manufacturer*	Share in total VZN supplies, %	
1-3Q 2023	1-3Q 2022		1-3Q 2023	1-3Q 2022
1	1	GENERIUM CJSC	18.8	17.3
2	5	**JOHNSON & JOHNSON**	14.3	10.0
3	2	**TAKEDA**	13.4	15.1
4	3	**ROCHE**	13.3	13.2
5	7	OCTAPHARMA	7.0	4.0
6	6	BIOCAD	4.8	8.6
7	15	SWEDISH ORPHAN BIO	3.5	0.8
8	11	**MERCK**	3.3	1.8
9	8	**NOVARTIS**	2.7	2.3
10	10	**CSL BEHRING GMBH**	2.6	2.0
			83.8	85.3

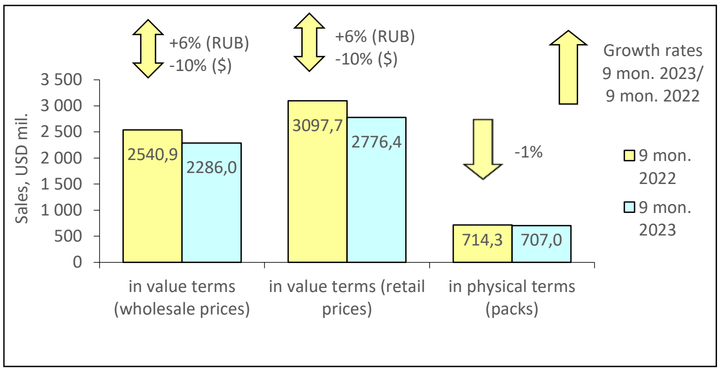
*AIPM members are in bold

Conclusion: In total, the share of Russian drugs in the VZN segment profile in physical terms reduced from 49% to almost 40% in the first half of 2023. In terms of roubles, it amounted to about 31%, showing a slight increase. Most of them are full-cycle drugs (including APIs). In the supplies pattern of foreign products in the 1-3 quarter of 2023, the share of imported localized drugs slightly decreased.

CFD PHARMACY MARKET (WITHOUT MOSCOW): 2023 FIRST NINE MONTHS RESULTS

According to Federal State Statistics Service, as of January 1, 2023 estimated population of the Central Federal District (CFD) (without Moscow) was 27.136 mil., which accounted for 18.5% of the total Russian Federation population. According to Federal State Statistics Service's data, based on the results for January-September of 2023 the average wage in the CFD (inclusive of Moscow) was RUB 87,718 (USD 1140.97), which was 25% higher than the average wage in Russia (RUB 70366). According to the results of the Retail Audit of Finished Pharma Products (FPP) in Russian Federationтм, at the end of the first nine months of 2023 the sales of drugs in physical terms in the CFD (without Moscow) saw a 1% decrease to 706.988 mil. packs. In value terms, the market saw a 6% increase in terms of roubles, and a 10% decrease in terms of dollars. At the same time, its volume reached RUB 187.425 bil. (USD 2.286 bil.) at wholesale prices (Fig.1). The region market share accounted for 21.1% of the Russian pharmacy retail sales. The average cost of a pack decreased as compared to the same period of 2022 (USD 4.34) and amounted to USD 3.93 in retail prices. At the end of January-September 2023, an average amount spent by the region residents for FPPs in the pharmacies amounted to USD 69.00.

Figure 1. The CFD (without Moscow) pharmacy market for 9 months of 2022 – 9 months of 2023*



BAYER (-3%) and STADA (+9%) continued to be the leaders among the Top 10 manufacturers in the market of the Central Federal District (excluding Moscow) following the results of 9 months of 2023 (Table 1). Note that the former reduced its sales and market share. In addition, two more manufacturers of the Top 10, OTCPHARM (-16%) and BERLIN-CHEMIE/MENARINI (-9%), showed negative growth rates. Both of them lowered their rating positions, moving down to ranks seven and the last one, respectively. SANOFI (+1%) lost four rating points, showing low positive growth rates. On the contrary, KRKA (+15%), TEVA (+11%) and BINNOPHARM (+23%) managed to move up to the higher positions, coming up to ranks three, five and eight, respectively. The manufacturers SERVIER (+ +6%) and ABBOTT (+3%) held their previous ranks four and nine. The consolidated share of the Top 10 reduced from 33% to 32.2%.

Table 1. The Top 10 drug manufacturers by pharmacy sales

Rank in the Top 10		Manufacturer*	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	1	**BAYER**	4.4	4.8
2	2	**STADA**	4.2	4.1
3	5	**KRKA**	3.6	3.3
4	4	**SERVIER**	3.4	3.4
5	7	**TEVA**	3.1	3.0
6	6	**SANOFI**	3.1	3.3
7	3	OTCPHARM	2.8	3.5
8	11	BINNOPHARM	2.7	2.3
9	9	**ABBOTT**	2.6	2.6
10	8	**BERLIN-CHEMIE/MENARINI**	2.4	2.8
Total			32.2	33.0

*AIPM members are in bold

Four of the Top 10 brands held their own in the ranking (Table 2). XARELTO (-5%) and ELIQUIS (-7%) held their leading ranks in the Top 10, and CONCOR (-7%) and CARDIOMAGNYL (-3%) kept their ranks eight and nine. Note that all of them showed negative growth rates. The other two brands also showed the reduction of sales. INGAVIRIN (-24%) moved down to the last rank, whereas MEXIDOL (-3%) moved up to rank five. The remaining four brands also moved up to the higher positions. DETRALEX (+0,4%), NUROFEN (+12%) and PENTALGIN (+8%) moved up to ranks three, four and six, and the only newcomer of the Top 10 EDARBI (+23%) moved up to the last rank. The total share of the Top 10 brands reduced by 0.6 p.p. ti 7.5%.

Table 2. The Top 10 brands by pharmacy sales

Rank in the Top 10		Brand	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	1	XARELTO	1.3	1.5
2	2	ELIQUIS	1.2	1.3
3	4	DETRALEX	0.7	0.8
4	7	NUROFEN	0.7	0.7
5	6	MEXIDOL	0.6	0.7
6	10	PENTALGIN	0.6	0.6
7	13	EDARBI	0.6	0.5
8	8	CONCOR	0.6	0.7
9	9	CARDIOMAGNYL	0.6	0.6
10	5	INGAVIRIN	0.5	0.7
Total			7.5	8.1

* Here and elsewhere IQVIA's data are used

Among the leading INNs and group names, the largest sales volumes continued to be accounted for by XYLOMETAZOLINE (+7%), which held its previous rank number one (Table 3). The combination DIOSMIN*HESPERIDIN (+7%) showed the same growth rates and was ranked second, displacing RIVAROXABAN (-5%) and APIXABAN (-7%) one rank down from that position. Another four INNs from the Top 10 ranking made advances. IBUPROFEN (+12%), PANCREATIN (+10%) and ROSUVASTATIN (+6%) moved one rank up, and DICLOFENAC (+4%) that broke into the Top 10 for the first time rounded it out. In contrast, NIMESULIDE (+1%) moved one rank down, being displaced by the more dynamic INN. INN BISOPROLOL (-0.5%) held its previous rank seven. The total share of the top 10 reduced from 11.5% to 11.2%.

Table 3. The Top 10 INNs and group names by pharmacy sales

Rank in the Top 10		INN/Group name	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	1	XYLOMETAZOLINE	1.6	1.6
2	4	DIOSMIN*HESPERIDIN	1.3	1.3
3	2	RIVAROXABAN	1.3	1.5
4	3	APIXABAN	1.2	1.3
5	6	IBUPROFEN	1.1	1.1
6	5	NIMESULIDE	1.1	1.2
7	7	BISOPROLOL	1.0	1.0
8	9	PANCREATIN	0.9	0.9
9	10	ROSUVASTATIN	0.9	0.9
10	12	DICLOFENAC	0.7	0.8
Total			11.2	11.5

The top 3 ATC groups in the Top 10 ranking remained unchanged: the groups C09 Agents acting on the rennin-angiotensin system (+9%), M01 Anti-inflammatory and antirheumatic products (+11%) and B01 Antithrombotic agents (-6%) held the first three ranks (Tables 4). G03 Sex hormones (+7%) also held their previous rank five. The remaining drug manufacturers shifted their ranks; moreover, all of them improved their positions. R01 Nasal preparations (+12%) moved up from rank six to four. N02 Analgesics (+7%), C05 Angioprotectives (+9%) and N06 Psychoanaleptics (+14%) moved one rank up, coming in at positions six through eight, respectively. The newcomers of the Top 10 J01 Antibacterials for systemic use (+20%) and S01 Ophthalmologicals (+10%) moved up to the last two ranks in the ranking. In total, the Top 10 ATC groups accumulated 38.6% of the regional market, which is more than the previous year value (37.8%).

Table 4. The Top 10 ATC groups by pharmacy sales

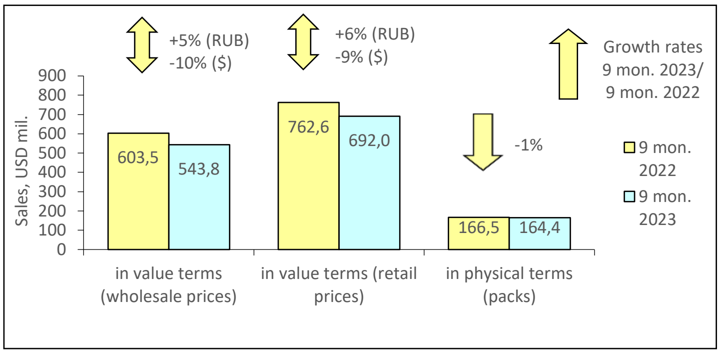
Rank in the Top 10		ATC code	ATC group	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022			9 mon. 2023	9 mon. 2022
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	6.0	5.9
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.6	5.4
3	3	B01	ANTITHROMBOTIC AGENTS	4.3	4.8
4	6	R01	NASAL PREPARATIONS	3.8	3.6
5	5	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.7	3.6
6	7	N02	ANALGESICS	3.6	3.5
7	8	C05	VASOPROTECTIVES	3.2	3.1
8	9	N06	PSYCHOANALEPTICS	3.1	2.9
9	12	J01	ANTIBACTERIALS FOR SYST USE	2.9	2.5
10	13	S01	OPHTHALMOLOGICALS	2.6	2.5
Total				38.6	37.8

Conclusion. At the end of nine months of 2023, retail sales on the pharmacy market of the Central Federal District (without Moscow) reached RUB 227.575 bil. (USD 2.776 bil.), which was 6% more in terms of roubles and 10% less in terms of dollars than in the same period of 2022. In pack terms, the market reduced by 1% and amounted to 706.988 mil. packs. In January-September 2023, the average cost of an FPP pack in the region pharmacies was USD 3.93, which was lower than the last year figure (USD 4.34), and then the national average (USD 4.09). The average medicine expenses of the region residents turned out to be lower than the national average expenses in Russia (USD 69.00 vs. USD 90.09).

NWFD (EXCLUS. OF SAINT PETERSBURG) PHARMACY MARKET: 2023 FIRST NINE MONTHS RESULTS

According to Federal State Statistics Service, as of January 1, 2023 estimated population of the North-Western Federal District (NWFD) (exclusive of St. Petersburg) was 8.267 mil., which accounted for 5.6% of the total Russian Federation population. According to Federal State Statistics Service's data, the average wage in the NWFD (with St. Petersburg) for nine months of 2023 was RUB 77,666 (USD 1010.22), which was 10% higher than the average wage in Russia (RUB 70366). According to the results of the Retail Audit of Finished Pharma Products (FPP) in the Russian Federation™, at the end of January-September of 2023 the sales of FPPs in physical terms in pharmacies of NWFD (without St. Petersburg) saw a 1% decrease to 164.376 mil. packs. In money terms, the market volume saw a 5% increase in terms of roubles and a 10% decrease in terms of dollars. At the same time, the volume of the market achieved RUB 44.504 bil. (USD 543.845 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 decreased: USD 4.21 vs. USD 4.58 at retail prices in the year-earlier period. The average amount spent by the residents of the region for FPPs in the pharmacies for 9 months of 2023 amounted to USD 49.90.

Figure 1. The NWFD (without St. Petersburg) pharmacy market for 9 months of 2022 – 9 months of 2023*



In the pharmacy market of the NWFD (excluding St. Petersburg), the top three manufactures held their own in the Top 10 manufacturers ranking according to the results for nine months of 2023 (Table 1). It still includes BAYER (-0.3%), which showed almost zero growth rates, as well as SERVIER and STADA, which increased sales by 6%. Shifts took place in the lower part of the Top 10 ranking, and most of the brands rose in the ranks. KRKA (+9%), TEVA (+3%), GEDEON RICHTER (+4%) and БИННОФАРМ (+23%) moved up to ranks four through seven, respectively. The newcomer ABBOTT (+3) moved up to the last rank in the Top 10. At the same time, SANOFI (-5%) and OTCPHARM (-18%) showed negative growth rates and moved down to the lower ranks eight and nine, respectively. The cumulative share of the Top 10 drug manufacturers reduced by almost 1 p.p. and accounted for 34.2%.

Table 1. The Top 10 drug manufacturers by pharmacy sales

Rank in the Top 10		Manufacturer*	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	1	**BAYER**	4.9	5.2
2	2	**SERVIER**	4.0	4.0
3	3	**STADA**	3.9	3.9
4	5	**KRKA**	3.6	3.5
5	7	**TEVA**	3.2	3.3
6	8	GEDEON RICHTER	3.0	3.1
7	10	BINNOPHARM	3.0	2.6
8	6	**SANOFI**	3.0	3.3
9	4	OTCPHARM	2.9	3.8
10	11	**ABBOTT**	2.5	2.5
Total			34.2	35.1

*AIPM members are in bold

Most of the Top 10 brands showed negative growth rates (Table 2). Among them were XARELTO (-12%) and ELIQUIS (-24%) that held their leading positions. DETRALEX (+4%) that showed positive growth rates and LORISTA that decreased sales by 16% also held their own in the rating. Four brands were able to improve their positions despite the negative growth rates. THERAFLU (-7%) and CONCOR (-11%) moved up to ranks five and six, and the newcomers FEMOSTON (-2%) and CARDIOMAGNYL (-6%) that entered the Top 10 ranking for the first time moved up to ranks eight and nine. At the same time, INGAVIRIN also reduced its sales by 22% and moved one rank down to number seven. In contrast, NUROFEN that showed outstripping positive growth rates moved two ranks up. The total share of the top 10 brands reduced from 8.7% to 7.5%.

Table 2. The Top 10 brands by pharmacy sales

Rank in the Top 10		Brand	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	1	XARELTO	1.4	1.6
2	2	ELIQUIS	1.1	1.5
3	5	NUROFEN	0.9	0.8
4	4	DETRALEX	0.8	0.8
5	7	THERAFLU	0.7	0.8
6	9	CONCOR	0.6	0.7
7	6	INGAVIRIN	0.6	0.8
8	12	FEMOSTON	0.5	0.6
9	11	CARDIOMAGNYL	0.5	0.6
10	10	LORISTA	0.5	0.6
Total			7.5	8.7

In contrast to the above rankings, most of the Top 10 INNs and group names ranking has increased their sales (Table 3). Due to the outstripping growth rates, XYLOMETAZOLINE (+6%), IBUPROFEN (+18%) and DIOSMIN*HESPERIDIN (+10%) moved up to the top positions. ROSUVASTATIN (+9%) moved two ranks up to number seven, and the newcomers, HYALURONIC ACID (+44%) and PANCREATIN (+12%), broke into the Top 10 for the first time, rounding it out. Three INNs of the Top 10 ranking reduced their sales. Among them were RIVAROXABAN (-12%) and APIXABAN (-24%), which used to be the leaders but dropped to ranks four and six. NIMESULIDE (-13%) and BISOPROLOL (-4%) retained their previous ranks five and eight. In total, the top 10 INNs and grouping names accumulated 11.5% of the regional sales as compared to 12.0% in the year-earlier period.

Table 3. The Top 10 INNs and group names by pharmacy sales

Rank in the Top 10		INN/Group name	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	3	XYLOMETAZOLINE	1.4	1.4
2	7	IBUPROFEN	1.4	1.3
3	6	DIOSMIN*HESPERIDIN	1.4	1.3
4	1	RIVAROXABAN	1.4	1.6
5	5	NIMESULIDE	1.1	1.3
6	2	APIXABAN	1.1	1.5
7	9	ROSUVASTATIN	1.0	1.0
8	8	BISOPROLOL	1.0	1.1
9	16	HYALURONIC ACID	0.9	0.6
10	11	PANCREATIN	0.9	0.8
Total			11.5	12.0

C09 Agents acting on the rennin-angiotensin system (+6%) and M01 Anti-inflammatory and antirheumatic products (+8%) continued to remain the best-selling groups on the regional market (Table 4). G03 Sex hormones (+8%) moved up to rank three from four, displacing B01 Antithrombotic agents (-16%) one rank down. C05 Vasoprotectives (+10%) also managed to improve their positions by one point, while groups R01 Nasal preparations (+13%) and A07 Antidiarrheals, intestinal antiinflammatory/antiinfective agents (+7%) improved their positions by two points. Note that the latter was the only newcomer of the Top 10 rating. N02 Analgesics (+6%) held their previous rank six, while J05 Antivirals for systemic use (-28%) and R05 Cough and cold preparations (-3%) decreased sales and moved down to the lower positions, eight and ten. The Top 10 ATC groups accounted for 38.8% of the regional pharmacy sales, 41.3% in the year-earlier period.

Table 4. The Top 10 ATC groups by pharmacy sales

Rank in the Top 10		ATC code	ATC group	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022			9 mon. 2023	9 mon. 2022
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	6.1	6.1
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.9	5.7
3	4	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.4	4.3
4	3	B01	ANTITHROMBOTIC AGENTS	4.0	4.9
5	7	R01	NASAL PREPARATIONS	3.7	3.5
6	6	N02	ANALGESICS	3.5	3.5
7	8	C05	VASOPROTECTIVES	3.2	3.0
8	5	J05	ANTIVIRALS FOR SYSTEMIC USE	2.8	4.2
9	11	A07	ANTIDIARRHEALS, INTESTINAL ANTIINFLAMMATORY/ANTIINFECTIVE AGENTS	2.6	2.6
10	9	R05	COUGH AND COLD PREPARATIONS	2.6	2.9
Total				38.9	40.6

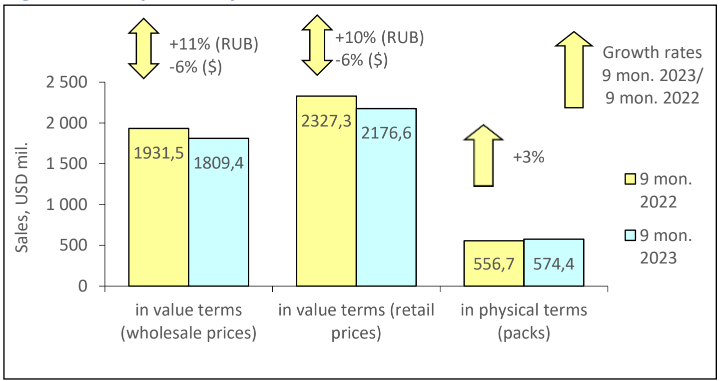
Conclusion. In January-September of 2023, the pharmacy market of the NWFD (excl. of St Petersburg) brought in RUB 56.922 bil. (USD 692.011 mil.), which was 6% more in terms of roubles, and 9% less in terms of dollars than in the same period of 2022. In pack terms, the market also showed negative growth rates (-1%) and achieved 164.376 mil. packs. According to the results for nine month of 2023, the average cost of an FPP pack in the regional pharmacies was USD 4.21, which was lower than the indicator of the same period of 2023 (USE 4.58), but higher than the average across the country (USD 4.09). The expenses of district residents for FPPs in the pharmacies were considerably lower than the national average (USD 49.90 vs. USD 90.09).

* Here and elsewhere IQVIA's data are used

VFD PHARMACY MARKET: 2023 FIRST NINE MONTHS RESULTS

According to the Federal State Statistics Service, as of January 1, 2023 estimated population of the Volga Federal District (VFD) 28.683 mil., which accounted for 19.6% of the total Russian Federation population. According to Federal State Statistics Service's data, in January-September of 2023 the average wage in the VFD was RUB 52,506 (USD 682.96), which was 25% lower than the national average wage in Russia (RUB 70366). According to the results of the Retail Audit of OTC drugs in Russian Federation™, the pharmacy market of VFD in pack terms expanded by 3% to 574.396 mil. packs for 9 months of 2023, as compared to the same period of 2022 (Figure 1). The sales in terms of wholesale prices increased by 11% in terms of roubles, whereas in terms of dollars they, in contrast, decreased by 6%. At the same time, the sales volume reached RUB 148.049 bil. (USD 1.809 bil.), A region's share in the total pharmacy sales in Russia accounted for 16.5%. Based on the results for January-September of 2023, the average cost of an FPP in the VFD pharmacies decreased as compared with the year-earlier period (USD 4.18) and was equal to USD 3.79. The average per capita expenses for purchase of drugs in the pharmacies were estimated at USD 75.89.

Figure 1. VFD pharmacy market for 9 months of 2022 – 9 months 2023*



Following the results of nine months of 2023, one manufacturer broke into the Top 10 ranking by retail sales in the pharmacy market of the Volga Federal District for the first time (Table 1). It was the most dynamic among the leaders, Russian PHARMSTANDARD (+29%), which moved up to rank ten. In addition to them, another three manufacturers of the Top 10 made advances in the ranking. Among them were the leader of the Top 10 STADA (+14%), as well as KRKA (+20%) and BINNOPHARM (+35%) that moved up to ranks three and six. At the same time, the latter displaced the manufacturers ABBOTT (+9%), SANOFI (+5%) and TEVA (+13%) one rank down, to numbers seven through nine, respectively. The last year leader, OTCPHARM, which sales reduced by 13%, moved four ranks down. Two manufacturers BAYER (+4%) and SERVIER (+8%) held their previous ranks two and five, respectively. The cumulative share of the top 10 brands didn't change and accounted for 30.2%.

Table 1. The Top 10 drug manufacturers by pharmacy sales

Rank in the Top 10		Manufacturer*	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	3	**STADA**	3.9	3.8
2	2	**BAYER**	3.6	3.9
3	4	**KRKA**	3.3	3.0
4	1	OTCPHARM	3.1	4.0
5	5	**SERVIER**	2.9	2.9
6	10	BINNOPHARM	2.8	2.3
7	6	**ABBOTT**	2.8	2.9
8	7	**SANOFI**	2.7	2.9
9	8	**TEVA**	2.6	2.6
10	16	PHARMSTANDARD	2.3	2.0
Total			30.2	30.2

*AIPM members are in bold

Four of the Top 10 brands held their own in the ranking (Table 2). MEXIDOL (+4%), HEPTRAL (+12%), DETRALEX (+8%) and ACTOVEGIN (+5%) continued to hold ranks four, five, seven and ten, respectively. All remaining brands of the Top 10 ranking made advances. At the same time, despite legging growth rates, XARELTO (+4%) moved up to rank one, ELIQUIS (-7%), which reduced sales, moved to rank two, while the former leader ARBIDOL reduced sales by 62% and fell outside the Top 10 ranking. EDARBI (+31%), PENTALGIN (+18%), NUROFEN (+19%) and URSOSAN (+37%) showed high positive sales rates, moving up to ranks three, six, eight and nine, respectively. The latter two names appeared in the Top -10 rating for the first time. The total share of the Top 10 brands remained the same - 6.7%.

Table 2. The Top 10 brands by pharmacy sales

Rank in the Top 10		Brand	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	2	XARELTO	1.0	1.1
2	3	ELIQUIS	0.8	1.0
3	9	EDARBI	0.7	0.6
4	4	MEXIDOL	0.7	0.7
5	5	HEPTRAL	0.6	0.6
6	8	PENTALGIN	0.6	0.6
7	7	DETRALEX	0.6	0.6
8	11	NUROFEN	0.6	0.5
9	15	URSOSAN	0.5	0.4
10	10	ACTOVEGIN	0.5	0.6
Total			6.7	6.7

Two newcomers broke into the Top 10 INN and group names ranking (Table 3). They were URSODEOXYCHOLIC ACID (+30%) and ADEMETIONINE (+16%), which moved up to ranks eight and nine. INN XYLOMETAZOLINE and the composition DIOSMIN* HESPERIDIN (+12% each), as well as IBUPROFEN (+20%) and PANCREATIN (+18%) moved up to the first four positions. They displaced RIVAROXABAN (+4%) one point down. They were followed by BISOPROLOL, which sales also increased by 4%, and the rating increased by one point. NIMESULIDE (+10%) moved up to rank seven from nine. And only APIXABAN that reduced its sales by 7% moved down to rank ten in the Top 10 ranking. The top ten INNs and grouping names' share accounted for 10% of the regional market, and 9.9% in a year-earlier period.

Table 3. The Top 10 INNs and group names by pharmacy sales

Rank in the Top 10		INN/Group name	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	2	XYLOMETAZOLINE	1.3	1.3
2	3	DIOSMIN*HESPERIDIN	1.1	1.1
3	5	IBUPROFEN	1.1	1.0
4	8	PANCREATIN	1.1	1.0
5	4	RIVAROXABAN	1.0	1.1
6	7	BISOPROLOL	0.9	1.0
7	9	NIMESULIDE	0.9	0.9
8	12	URSODEOXYCHOLIC ACID	0.9	0.7
9	11	ADEMETIONINE	0.8	0.8
10	6	APIXABAN	0.8	1.0
Total			10.0	9.9

M01 Anti-inflammatory and antirheumatic products (+21%) became the best-selling ATC group in the regional market and moved up to rank number one from two in the Top 10 ranking (Table 4). At the same time, it displaced the former leader, but less dynamic C09 Agents acting on the rennin-angiotensin system (+15%) one position down. In addition to the leader, another five ATC groups made advances. G03 Sex hormones (+8%) moved up to rank three, as well as N02 Analgesics (+15%), J01 Antibacterials for systemic use (+18%) and N06 Psychoanaleptics (+19%) moved up to ranks five through seven, respectively. The newcomer C05 Vasoprotectives (+14%) rounded out the Top 10 ranking. The group R01 Nasal preparations (+14%) lost one rating point despite the outstripping rates, and J05 Antivirals for systemic use reduced its sales by 23% and moved down to rank nine from three. And only B01 Antithrombotic agents (-2%) held their positions unchanged. In total, the Top 10 ATC groups accounted for 37.9% of the regional sales, which was less than the year-earlier period indicator (38.43).

Table 4. The Top 10 ATC groups by pharmacy sales

Rank in the Top 10		ATC code	ATC group	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022			9 mon. 2023	9 mon. 2022
1	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.9	5.4
2	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.7	5.5
3	5	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.7	3.7
4	4	B01	ANTITHROMBOTIC AGENTS	3.6	4.0
5	6	N02	ANALGESICS	3.5	3.3
6	8	J01	ANTIBACTERIALS FOR SYST USE	3.3	3.1
7	9	N06	PSYCHOANALEPTICS	3.3	3.0
8	7	R01	NASAL PREPARATIONS	3.2	3.1
9	3	J05	ANTIVIRALS FOR SYSTEMIC USE	3.0	4.3
10	11	C05	VASOPROTECTIVES	2.8	2.7
Total				37.9	38.3

Conclusion. Based on the results for nine months of 2023, the pharmacy market in the VFD was estimated at RUB 178.042 bil. (USD 2.177 bil.) at retail prices. At the same time, the market behaviour was positive in rouble terms (+10%) and negative in dollar (-6%) terms. In physical terms, the sales increased by 3% to 574.396 mil. packs. The average cost of OTC pack based on the results for January-September of 2023 was USD 3.79, which was less than in the year-earlier period (USD 4.18) and the national average in Russia (USD 4.09). Per capita expenses of the district residents for purchase of medicines in the pharmacies were also lower than the national average figures (USD 75.89 vs. USD 90.09).

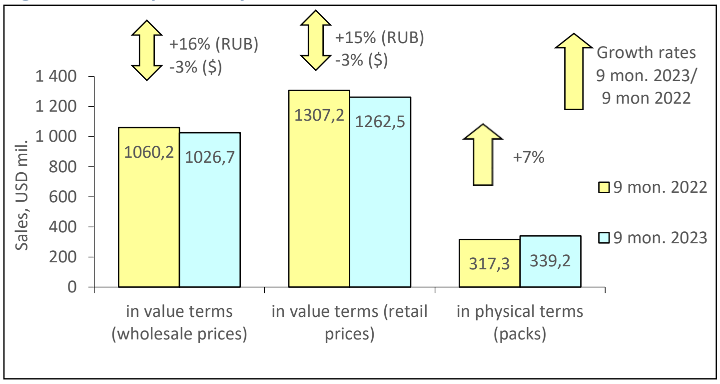
* Here and elsewhere IQVIA's data are used

SOUTHERN FEDERAL DISTRICT PHARMACY MARKET: 2023 FIRST NINE MONTHS RESULTS

According to the Federal State Statistics Service, as of January 1, 2023 estimated population of the Southern Federal District (SoFD) was 16.642 mil., which accounted for 11.4% of the total Russian Federation population. According to Federal State Statistics Service's data, based on the results for 9 months of 2023 the average salary in the SoFD was RUB 50,082 (USD 651.43), which was 29% lower than the national average salary throughout Russia (RUB 70366).

According to the results of the Retail Audit of Finished Pharma Products (FPP) in Russian Federation™, in January-September of 2023 the sales of drugs in physical terms in the SoFD continued to grow, and reached 339.237 mil. packs. In value terms, the market showed positive growth rates in terms of roubles (+16%), but decreased by 3% in terms of dollars. The volume of the market amounted to RUB 84.570 bil. (USD 1.027 bil.) at wholesale prices (Fig. 1). The city market share accounted for 9.6% of the pharmacy sales in Russia. Based on the results for nine months of 2023, the average cost of a finished pharma product (FPP) pack was USD 3.72 at retail prices vs. USD 4.12 in a year-earlier period. In the analysed period, the average amount spent by residents of the SoFD for drugs amounted to USD 75.86.

Figure 1. SoFD pharmacy market for 9 months of 2022 – 9 months 2023*



Based on the results of January-September 2023, BAYER (+9%) remains the leader of the Top 10 manufacturers in the market of the Southern Federal District, despite lagging sales growth rates and a slight decrease in the market share (Table 1). They were followed by the companies that showed outstripping growth rates and rose in the ranks. STADA (+25%), SERVIER (+19%), ABBOTT (+20%), BINNOPHARM (+25%) and TEVA (+17%) moved up to ranks two through six, respectively. The newcomers VERTEX (+58%) and GEDEON RICHTER (+19%) broke into the ranks of the Top 10, moving up to rank eight and the last one. At the same time, SANOFI (+1%) that showed low growth rates and OTCPHARM that reduced its sales buy 24%, in contrast, moved down to ranks seven and nine. In total, the Top 10 manufacturers accounted for 30.1% of the market, whereas in the year– earlier period they had accounted for 30.4%.

Table 1. The Top 10 drug manufacturers by pharmacy sales

Rank in the Top 10		Manufacturer*	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	1	**BAYER**	4.2	4.3
2	3	**STADA**	4.0	3.7
3	4	**SERVIER**	3.2	3.1
4	6	**ABBOTT**	3.0	2.9
5	7	BINNOPHARM	3.0	2.8
6	8	**TEVA**	2.7	2.6
7	5	**SANOFI**	2.7	3.0
8	14	VERTEX	2.6	1.9
9	2	OTCPHARM	2.5	3.8
10	11	GEDEON RICHTER	2.3	2.2
Total			30.1	30.4

*AIPM members are in bold

All of the Top 10 brands showed positive growth rates and made advances in the rating (Table 2). ELIQUIS (+20%) and XARELTO (+25%) moved one rank up, coming in at the top two ranks. They were followed by NUROFEN (+33%), DETRALEX (+14%) and HEPTRAL (+15%), which improved their ratings by two points. In addition, ACTOVEGIN (+20%) and PENTALGIN (+16%) moved two ranks up, coming in at numbers seven and eight. Three newcomers EDARBI (+63%), CARDIOMAGNYL (+14%) and FORXIGA (+80%) moved up to ranks six and two bottom ranks. In total, the Top 10 brands accumulated 7.0% of the regional market, whereas in the year-earlier period their share was 6.4%.

Table 2. The Top 10 brands by pharmacy sales

Rank in the Top 10		Brand	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	2	ELIQUIS	1.3	1.2
2	3	XARELTO	1.0	1.0
3	5	NUROFEN	0.7	0.7
4	6	DETRALEX	0.6	0.7
5	7	HEPTRAL	0.6	0.6
6	19	EDARBI	0.6	0.4
7	9	ACTOVEGIN	0.6	0.5
8	10	PENTALGIN	0.5	0.5
9	14	CARDIOMAGNYL	0.5	0.5
10	32	FORXIGA	0.5	0.3
Total			7.0	6.4

Only one newcomer broke into the ranks of the Top 10 INN and generic names ranking, INN GABAPENTIN (+54%) moved up to the last rank (Table 3). Another six INNs of the Top 10 made advances in the rating. Among them were INNs XYLOMETAZOLINE (+10%) and APIXABAN (+20%), the combination DIOSMIN* HESPERIDIN (+23%) and INN IBUPROFEN (+28%), which moved one rank up and topped the rating. RIVAROXABAN (+25%) moved up to rank five from eight, and ADEMETIONINE (+30%) moved up to rank eight from ten. The other INNs from the Top 10 rating retained their positions unchanged. NIMESULIDE (+7%), PANCREATIN (+13%) and BISOPROLOL (+14%) continued to hold ranks six, seven and nine, respectively. The total share of the Top 10 ranking expanded from 10.5% to 10.9%.

Table 3. The Top 10 INNs and group names by pharmacy sales

Rank in the Top 10		INN/Group name	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	2	XYLOMETAZOLINE	1.6	1.6
2	3	APIXABAN	1.3	1.2
3	4	DIOSMIN*HESPERIDIN	1.2	1.2
4	5	IBUPROFEN	1.2	1.1
5	8	RIVAROXABAN	1.0	1.0
6	6	NIMESULIDE	1.0	1.1
7	7	PANCREATIN	1.0	1.0
8	10	ADEMETIONINE	0.9	0.8
9	9	BISOPROLOL	0.9	0.9
10	16	GABAPENTIN	0.8	0.6
Total			10.9	10.5

The leader of the Top 10 ATC groups did not change: M01 Anti-inflammatory and antirheumatic products (+19%) held and reinforced rank number one (Table 4). The groups R01 Nasal preparations (+17%) and C05 Angioprotectives (+18%) also held their previous positions six and ten. Five ATC groups managed to rise in the ranks. Thus, groups C09 Agents acting on the renin-angiotensin system (+26%), G03 Sex hormones (+36%) and N02 Analgesics (+22%) moved up to ranks two through four, respectively. J01 Antibacterials for systemic use (+24%) and the newcomer N06 Psychoanaleptics (+28%), which broke into the Top 10 for the first time, also moved up to higher positions, coming in at numbers seven and ten, respectively. At the same time, B01 Antithrombotic agents (+16%) and J05 Antivirals for systemic use (-23%) moved down to ranks five and eight. The total share of the Top 10 expanded by 0.5 p.p, to 39.0%.

Table 4. The Top 10 ATC groups by pharmacy sales

Rank in the Top 10		ATC code	ATC group	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022			9 mon. 2023	9 mon. 2022
1	1	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.4	5.2
2	3	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.1	4.6
3	7	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.1	3.5
4	5	N02	ANALGESICS	4.1	3.9
5	4	B01	ANTITHROMBOTIC AGENTS	4.1	4.1
6	6	R01	NASAL PREPARATIONS	3.7	3.7
7	8	J01	ANTIBACTERIALS FOR SYST USE	3.4	3.1
8	2	J05	ANTIVIRALS FOR SYSTEMIC USE	3.1	4.7
9	11	N06	PSYCHOANALEPTICS	3.1	2.8
10	10	C05	VASOPROTECTIVES	2.9	2.8
Total				39.0	38.5

Conclusion. At the end of January-September of 2023, the retail pharmacy market of SoFD brought in RUB 103.975 bil. (USD 1.263 bil.) at retail prices. At the same time, the sales increased by 15% in terms of roubles, but decreased by 3% in terms of dollars. The regional pharmacies sold 339.237 mil. packs, which was 7% more than in the same period of 2022. The average cost of an FPP pack based on the results for 9 months of 2023 amounted to USD 3.72, which was less than the previous year figure (USD 4.09), and the national average (USD 4.09). In the analysed period, the average expenses of the SoFD residents for FPPs in the pharmacies were also lower than the national average (USD 75.86 vs. USD 90.09).

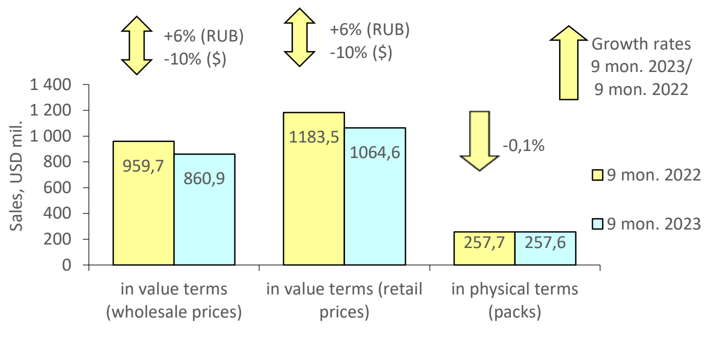
* Here and elsewhere IQVIA's data are used

UFD PHARMACY MARKET: 2023 FIRST NINE MONTHS RESULTS

According to the Federal State Statistics Service, as of January 1, 2023 estimated population of the Ural Federal District (UFD) was 12.259 mil., which accounted for 8.4% of the total Russian Federation population. According to Federal State Statistics Service's data, the average wage for 9 months of 2023 in the UFD region was RUB 75,105 (USD 976.91), which was 7% higher than the average wage in Russia (RUB 70366).

According to the results of the Retail Audit of FPP (Finished Pharmaceutical Products) in Russian Federation™, at the end of the 9 of 2023 the sales of drugs in physical terms in the Ural Federal District did not virtually change (-0.1%) and amounted to 257.555 mil. packs. In value terms, the market showed positive growth rates in terms of roubles (+6%), negative ones in terms of dollars (-10%), and its volume reached RUB 70.355 bil. (USD 860.906 mil.) at 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 in January-September of 2023 was USD 4.13 against USD 4.59 in the year-earlier period. For nine months of 2023, the average amount spent by residents of UFD for medications amounted to USD 86.84.

Figure 1. UFD pharmacy market for 9 months of 2022 – 9 months 2023*



Based on the results for January-September 2023, the manufacturers rating by sales volume in the retail market of the Ural Federal District was topped by STADA (+5%) (Table 1). The former leaders BAYER (-5%) and OTCPHARM (-18%) reduced their sales and, as a result, fell in the ranks, moving one point down. The most dynamic manufacturer BINNOPHARM (+47%) that broke into the ranks of the Top 10 ranking for the first time was ranked fourth. The less dynamic manufacturer GEDEON RICHTER (+9%) moved one rank up, to number six. At the same time, three manufacturers, in contrast, moved down to the lower ranks. SANOFI (+1%), ABBOTT (+3%) and KRKA (+15%) moved down to ranks seven and two bottom ranks. The companies SERVIER (+6%) and TEVA (+8%) as before held ranks five and eight in the ranking. The total share of the top 10 drug manufacturers decreased from 31.8% to 31.5%.

Table 1. The Top 10 drug manufacturers by pharmacy sales

Rank in the Top 10		Manufacturer*	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	3	**STADA**	4.1	4.1
2	1	**BAYER**	3.8	4.2
3	2	OTCPHARM	3.2	4.1
4	11	BINNOPHARM	3.0	2.2
5	5	**SERVIER**	3.0	3.0
6	7	GEDEON RICHTER	3.0	2.9
7	4	**SANOFI**	2.9	3.1
8	8	**TEVA**	2.9	2.8
9	6	**ABBOTT**	2.8	2.9
10	9	**KRKA**	2.8	2.6
Total			31.5	31.8

*AIPM members are in bold

Three of the Top 10 brands held their own in the ranking: ELIQUIS (-17%), HEPTRAL (+4%) and INGAVIRIN (+3%) maintained their positions three, five and six, respectively (Table 2). Most of the Top 10 brands made advances in the rating. Thus, XARELTO (-17%) moved to rank number one from two, despite the pronounced reduction in sales. DETRALEX (+4%) and PENTALGIN (+2%) moved two ranks up, coming in at numbers two and seven. The more dynamic NUROFEN (+5%) moved three ranks up, whereas the newcomers URSOSAN (+30%) and EDARBI (+26%) broke into the ranks of the Top 10 ranking, coming in at numbers eight and ten. FEMOSTON (-11%) that lost one rating point showed a decrease in sales volumes and rating positions. The total share of the Top 10 was 5.7%, in the year-earlier period it was 6.0%.

Table 2. The Top 10 brands by pharmacy sales

Rank in the Top 10		Brand	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	2	XARELTO	0.7	0.9
2	4	DETRALEX	0.7	0.7
3	3	ELIQUIS	0.6	0.8
4	7	NUROFEN	0.6	0.6
5	5	HEPTRAL	0.6	0.6
6	6	INGAVIRIN	0.6	0.6
7	9	PENTALGIN	0.5	0.5
8	14	URSOSAN	0.5	0.4
9	8	FEMOSTON	0.5	0.6
10	20	EDARBI	0.5	0.4
Total			5.7	6.0

Only one INN among the Top 10 INNs and group names, RIVAROXABAN (-17%), showed negative growth rates (Table 3). At the same time, it lost three rating points and rounded out the Top 10 ranking. Almost all remaining brands of the Top 10 ranking rose in the ranks. It was topped by the combination DIOSMIN*HESPERIDIN (+9%), and IBUPROFEN (+15%), NIMESULIDE (+7%) and PANCREATIN (+8%) moved up to ranks three through five, respectively. INN ROSUVASTATIN and ADEMETIONINE, which showed a 10% increase in sales, improved their positions by one point, moving up to ranks seven and nine, respectively. Two newcomers of the Top 10 HYALURONIC ACID (+42%) and URSODEOXYCHOLIC ACID (+27%) moved up to ranks six and eight, respectively. And only INN XYLOMETAZOLINE (+4%) as before held its previous rank two in the ranking. The cumulative share of the Top 10 expanded from 9.7% to 10.1%.

Table 3. The Top 10 INNs and group names by pharmacy sales

Rank in the Top 10		INN/Group name	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	3	DIOSMIN*HESPERIDIN	1.4	1.3
2	2	XYLOMETAZOLINE	1.3	1.4
3	4	IBUPROFEN	1.2	1.1
4	5	NIMESULIDE	1.0	1.0
5	6	PANCREATIN	1.0	0.9
6	13	HYALURONIC ACID	1.0	0.7
7	8	ROSUVASTATIN	0.9	0.9
8	12	URSODEOXYCHOLIC ACID	0.9	0.7
9	10	ADEMETIONINE	0.8	0.8
10	7	RIVAROXABAN	0.7	0.9
Total			10.1	9.7

The Top three groups held their own in the Top 10 ATC groups ranking: M01 Anti-inflammatory and antirheumatic products (+13%), C09 Agents acting on the rennin-angiotensin system (+9%) and G03 Sex hormones (+5%) kept the first ranks (Table 4). C05 Vasoprotectives (+8%) also held their previous rank eight. Four of the Top 10 ATC groups moved up to the higher positions. N02 Analgesics (+9%), R01 Nasal preparations (+6%) and N06 Psychoanaleptics (+12%), as well as the newcomer J01 Antibacterials for systemic use (+20%), which broke into the Top 10 ranking for the first time, moved up to ranks four, five, seven and ten, respectively. At the same time, J05 Antivirals for systemic use 19% (-17%) and B01 Antithrombotic agents (-11%), which reduced sales, moved down to ranks six and nine, respectively. In total, the Top 10 ATC groups accumulated 37.1% of the regional market, whereas in the year-earlier period they accounted for 37.3%.

Table 4. The Top 10 ATC groups by pharmacy sales

Rank in the Top 10		ATC code	ATC group	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022			9 mon. 2023	9 mon. 2022
1	1	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.8	5.4
2	2	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.2	5.0
3	3	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.4	4.4
4	6	N02	ANALGESICS	3.5	3.4
5	7	R01	NASAL PREPARATIONS	3.4	3.4
6	4	J05	ANTIVIRALS FOR SYSTEMIC USE	3.1	3.9
7	9	N06	PSYCHOANALEPTICS	3.1	2.9
8	8	C05	VASOPROTECTIVES	3.0	2.9
9	5	B01	ANTITHROMBOTIC AGENTS	2.9	3.5
10	15	J01	ANTIBACTERIALS FOR SYST USE	2.8	2.5
Total				37.1	37.3

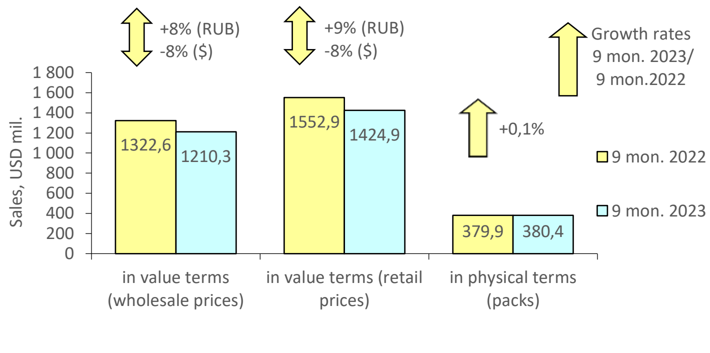
Conclusion. In January-September 2023, the pharmacy market of the Ural Federal District brought in RUB 86,989 bil. (USD 1.065 bil.) at retail prices. The regional sales grew by 6% in terms of roubles, but reduced by 10% in terms of dollars. In pack terms, the market did not virtually change and amounted to 257.555 mil. packs. According to the results for nine months of 2023, the average cost of an FPP pack in the district pharmacies was USD 4.13, which was less than the last year figure (USD 4.59), but higher than average figures (USD 4.09). The average expenses of the UFD residents for medications in the pharmacies were also lower than the national average in Russia (USD 86.84 vs. USD 90.09).

* Here and elsewhere IQVIA's data are used

SiFD PHARMACY MARKET: 2023 FIRST NINE MONTHS RESULTS

According to Federal State Statistics Service, as of January 1, 2023 estimated population of the Siberian Federal District (SiFD) was 16.646 mil., which accounted for 11.4% of the total Russian Federation population. According to the Federal State Statistics Service, in January-September of 2023 the average wage in the SiFD was RUB 62,325 (USD 810.68), which was 11% lower than the national average salary throughout Russia (RUB 70,366). According to the results of the Retail Audit of OTC drugs in Russian Federation™, in the first nine months of 2023 the SFD pharmacy market volume showed almost zero growth rates (+0,1%) and its volume was equal to 380.426 mil. packs (Fig. 1) The sales in wholesale prices increased by 8% in terms of roubles, but reduced by 8% in terms of dollars, reaching RUB 99.080 bil. (USD 1.210 bil), The district's share accounted for 10.8% of the total pharmacy sales in the Russian pharmacy market pattern. In January-September of 2023, the average cost of FPP in the SiFD pharmacies was USD 3.75, whereas in the year-earlier period its cost was USD 4.09. In the analysed period, per capita expenses of the SiFD residents for purchase of medicines in pharmacies reached USD 85.60.

Figure 1. SiFD pharmacy market for 9 months of 2022 – 9 months 2023*



Based on the results for January-September 2023, the leader of the Top 10 manufacturers in the pharmacy market of the Siberian Federal District changed (Table 1). STADA (+11%) moved up to rank number one from two, displacing the less dynamic BAYER (+2%) to rank two. KRKA (+15%) moved up to rank three from five, whereas OTCPHARM (-16%), which had been placed on that rank earlier, moved down to rank five. Another reshuffle affected ranks six and seven: the more dynamic TEVA (+7%) moved one rank up, displacing SANOFI (-0.1%) that showed almost zero growth rates to rank seven. The only newcomer of the Top 10, BINNOPHARM (+31%), moved to rank nine, displacing GEDEON RICHTER (+9%) to the last rank. Two manufacturers SERVIER (+9%) and ABBOTT (+7%) held their previous ranks four and eight in the ranking. The total share of the top 10 manufacturers has reduced from 32.3% to 31.6%

Table 1. The Top 10 drug manufacturers by pharmacy sales

Rank in the Top 10		Manufacturer*	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	2	**STADA**	4.2	4.2
2	1	**BAYER**	4.1	4.3
3	5	**KRKA**	3.4	3.2
4	4	**SERVIER**	3.2	3.2
5	3	OTCPHARM	3.1	3.9
6	7	**TEVA**	2.9	2.9
7	6	**SANOFI**	2.8	3.0
8	8	**ABBOTT**	2.7	2.8
9	12	BINNOPHARM	2.7	2.3
10	9	GEDEON RICHTER	2.6	2.6
Total			31.6	32.3

*AIPM members are in bold

Only one brand's position remained unchanged in the Top 10 brands ranking. That was THERAFLU (+5%) holding rank nine. Seven of the Top 10 brands rose in the ranks. ELIQUIS (-8%), XARELTO (+1%) and DETRALEX (+9%) moved one rank up, coming in at the top three numbers. PENTALGIN (+3%) also moved one position up, FEMOSTON (+8%) moved two positions up, coming in at ranks five and six, respectively. The brands EDARBI (+31%) and NUROFEN (+16%) broke into the ranking for the first time, moving up to ranks four and eight, respectively. Two brands, LORISTA (-14%) and CARDIOMAGNYL (-5%) reduced sales and fell in the ranks, coming in at numbers seven and ten. In total, the top ten brands accumulated 6.6% of the pharmacy sales, 6.9% in the year-earlier period.

Table 2. The Top 10 brands by pharmacy sales

Rank in the Top 10		Brand	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	2	ELIQUIS	0.9	1.1
2	3	XARELTO	0.9	0.9
3	4	DETRALEX	0.8	0.8
4	15	EDARBI	0.6	0.5
5	6	PENTALGIN	0.6	0.7
6	8	FEMOSTON	0.6	0.6
7	5	LORISTA	0.6	0.7
8	14	NUROFEN	0.6	0.5
9	9	THERAFLU	0.6	0.6
10	7	CARDIOMAGNYL	0.5	0.6
Total			6.6	6.9

In contrast to the above rankings, the leader of the Top 10 INNs and group names did not change - as before, INN XYLOMETAZOLINE (+5%) held its rank number one (Table 3). In addition, another three INNs of the Top 10 ranking managed to rise in the ranks. BISOPROLOL (+0,1%), RIVAROXABAN (+1%) and PANCREATIN (+18%) moved down to ranks six, eight and nine. The composition DIOSMIN* HESPERIDIN (+15%), INN IBUPROFEN (+16%), which entered the Top 10 for the first time, HYALURONIC ACID (+88%), as well as NIMESULIDE (+5%) moved up to ranks two through five from the lower ones. Another newcomer, URSODEOXYCHOLIC ACID (+27%), rounded out the Top 10 ranking. And only APIXABAN that reduced sales by 8% moved down from rank four to seven. The total share expanded from 9.8% to 10.2%.

Table 3. The Top 10 INNs and group names by pharmacy sales

Rank in the Top 10		INN/Group name	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	1	XYLOMETAZOLINE	1.4	1.4
2	3	DIOSMIN*HESPERIDIN	1.3	1.2
3	5	IBUPROFEN	1.1	1.1
4	20	HYALURONIC ACID	1.0	0.6
5	7	NIMESULIDE	1.0	1.0
6	6	BISOPROLOL	0.9	1.0
7	4	APIXABAN	0.9	1.1
8	8	RIVAROXABAN	0.9	0.9
9	9	PANCREATIN	0.9	0.8
10	11	URSODEOXYCHOLIC ACID	0.8	0.7
Total			10.2	9.8

M01 Anti-inflammatory and antirheumatic products (+15%), C09 Agents acting on the renin-angiotensin system (+12%), G03 Sex hormones (+11%) and N02 Analgesics (+10%) held and due to outstripping growth rates reinforced their leading positions in the Top 10 ATC groups ranking (Table 4). Note that the markets of another four of the Top 10 INNs developed at a fast pace. Thus, groups R01 Nasal preparations and C05 Angioprotectives increased sales by 11%, and N06 Psychoanaleptics expanded them by 12%, which allowed them to move up to ranks five, seven and eight, respectively. The Top 10 was rounded out by its only newcomer J01 Antibacterials for systemic use (+13%). At the same time, B01 Antithrombotic agents (-5%) and J05 Antivirals for systemic use (-18%), on the contrary, moved down to the lower ranks six and nine. The total share of the Top 10 ATC groups reduced from 37.8% to 37.6%.

Table 4. The Top 10 ATC groups by pharmacy sales

Rank in the Top 10		ATC code	ATC group	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022			9 mon. 2023	9 mon. 2022
1	1	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.8	5.5
2	2	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.6	5.4
3	3	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.5	4.4
4	4	N02	ANALGESICS	3.9	3.8
5	7	R01	NASAL PREPARATIONS	3.5	3.4
6	5	B01	ANTITHROMBOTIC AGENTS	3.3	3.7
7	8	C05	VASOPROTECTIVES	3.0	2.9
8	9	N06	PSYCHOANALEPTICS	2.8	2.7
9	6	J05	ANTIVIRALS FOR SYSTEMIC USE	2.7	3.5
10	12	J01	ANTIBACTERIALS FOR SYST USE	2.6	2.5
Total				37.6	37.8

Conclusion. At the end of the first nine months of 2023, the pharmacy market in the Siberian Federal District was estimated at RUB 116.654 bil. (USD 1.425 bil.) at final consumer prices. At the same time, the market behaviour was positive in rouble (+9%), but negative (-8%) in dollar terms. In physical terms, the sales did not virtually change and amounted to 380.426 mil. packs. The average cost of an FPP pack reduced as compared to a similar year-earlier period (USD 3.75 vs. USD 4.09), but continued to be lower than the national FPP price average in Russia (USD 4.32). Per capita expenses of the district residents for purchase of medicines in the pharmacies were also lower than the national average figures (USD 85.60 vs. USD 90.09).

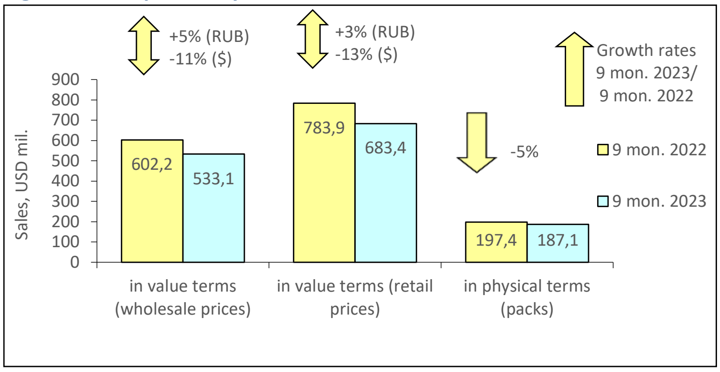
* Here and elsewhere IQVIA's data are used

FEFD PHARMACY MARKET: 2023 FIRST NINE MONTHS RESULTS

According to Federal State Statistics Service, as of January 1, 2023 estimated population of the Far Eastern Federal District (FEFD) was 7.904 mil., which accounted for 5.4% of the total Russian Federation population. According to Federal State Statistics Service's data, based on the results for the first nine months of 2023 the average wage in the FEFD was RUB 79,819 (USD 1038.23), which was 13% higher than the average wage in Russia (RUB 70366).

According to the results of the Retail Audit of Over-the-Counter Drugs (OTC) in Russian Federation™, in January-September of 2023 the sales of OTC drugs in physical terms in the pharmacies of the FEFD continued to decline (-5%) and amounted to 187.078 mil. packs. In money terms, the market saw a 5% increase in terms of roubles and 11% decrease in terms of dollars. At the same time, the volume of the market amounted to RUB 43.630 bil. (USD (533.054 mil.) at wholesale prices (Fig. 1). The district's share accounted for 5.2% of the Russian sales in retail prices. The average cost of a pack decreased as compared to a year earlier period (USD 3.97) and was equal to USD 3.65. The average amount spent by the residents of the FEFD region for drugs in the pharmacies for 9 months of 2023 amounted to USD 86.46.

Figure 1. SiFD pharmacy market for 9 months of 2022 – 9 months 2023*



At the end of January-September 2023 STADA (+8%) topped the rating of manufacturers in the retail market of the Far Eastern Federal District, displacing the less dynamic BAYER (+2%) one rank down (Table 1). In addition to the leader, another five companies' markets developed at a fast pace. The manufacturers KRKA (+10%), SERVIER (+7%), TEVA (+8%) and ABBOTT (+6%) moved up to ranks three, four, six and nine, respectively. The newcomer BINNOPHARM (+12%) rounded out the Top 10 ranking. The less dynamic GEDEON RICHTER (+1%), as well as OTCPHARM, which reduced sales by 21%, moved down to ranks five and seven, respectively. SANOFI retained its rank eight despite a 3% decline in sales. The cumulative share of the Top 10 reduced by 1 p.p. and achieved 31.7%.

Table 1. The Top 10 drug manufacturers by pharmacy sales

Rank in the Top 10		Manufacturer*	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	2	**STADA**	4.4	4.3
2	1	**BAYER**	4.2	4.4
3	4	**KRKA**	3.4	3.2
4	5	**SERVIER**	3.2	3.2
5	3	OTCPHARM	3.2	4.2
6	7	**TEVA**	3.1	3.0
7	6	GEDEON RICHTER	2.9	3.0
8	8	**SANOFI**	2.7	2.9
9	10	**ABBOTT**	2.5	2.5
10	12	BINNOPHARM	2.2	2.1
Total			31.7	32.7

*AIPM members are in bold

The leader of the Top 10 brand ranking also changed (Table 2). ARBIDOL, which used to top it, showed a pronounced decline in sales (-56%) and moved down to rank five. That allowed the brand XARELTO (-9%) to move one rank up, coming in at rank number one, despite the negative growth rates. NUROFEN (+7%) moved up to rank two from four, and ELIQUIS that reduced sales, but maintained its position rounded out the Top 10 brands ranking. Note that another four brands of the Top 10 showed the negative growth rates. INGAVIRIN (-2%) and CARDIOMAGNYL (-8%) held their previous ranks seven and eight, whereas THERAFLU (-5%) and LORISTA (-10%) lost one ranking position each. On the contrary, DETRALEX (+19%) and URSOSAN (+24%) showed pronounced positive growth rates, which allowed them to move up to higher ranks four and nine. On top of that, the latter became the only newcomer of the top 10 ranking. The total share of Top 10 decreased by almost 1.1 p.p. and accounted for 7%.

Table 2. The Top 10 brands by pharmacy sales

Rank in the Top 10		Brand	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	2	XARELTO	0.9	1.0
2	4	NUROFEN	0.8	0.8
3	3	ELIQUIS	0.8	0.9
4	6	DETRALEX	0.8	0.8
5	1	ARBIDOL	0.7	1.6
6	5	THERAFLU	0.7	0.8
7	7	INGAVIRIN	0.6	0.7
8	8	CARDIOMAGNYL	0.6	0.7
9	15	URSOSAN	0.6	0.5
10	9	LORISTA	0.5	0.6
Total			7.0	8.4

One newcomer broke into the Top 10 INN and group names ranking as well (Table 3). It was URSODEOXYCHOLIC ACID (+23%) rounding it out. In addition, another eight INNs moved up to higher ranks. INNs XYLOMETAZOLINE and IBUPROFEN (+7% each), as well as the composition DIOSMIN*HESPERIDIN (+13%) moved one point up, coming in at the top three ranks. BISOPROLOL was also able to improve its rating by one point, despite a 5% decrease in sales volumes. NIMESULIDE (+5%) and PANCREATIN (+13%) moved higher than it, coming in at numbers four and five. RIVAROXABAN (-11%) and UMIFENOVIR (-52%) reduced sales and moved down to ranks seven and eight, whereas APIXABAN (-4%) retained its previous rank nine. The cumulative share of the Top 10 reduced: 10,4% vs 11,4% in the year-earlier period.

Table 3. The Top 10 INNs and group names by pharmacy sales

Rank in the Top 10		INN/Group name	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	2	XYLOMETAZOLINE	1.7	1.6
2	3	IBUPROFEN	1.4	1.3
3	4	DIOSMIN*HESPERIDIN	1.2	1.1
4	6	NIMESULIDE	1.0	1.0
5	8	PANCREATIN	1.0	0.9
6	7	BISOPROLOL	0.9	1.0
7	5	RIVAROXABAN	0.9	1.0
8	1	UMIFENOVIR	0.8	1.8
9	9	APIXABAN	0.8	0.9
10	15	URSODEOXYCHOLIC ACID	0.8	0.7
Total			10.4	11.4

M01 Anti-inflammatory and antirheumatic products (+11%) and C09 Agents acting on the rennin-angiotensin system (+7%) remained the sales leaders among ATC groups in the regional market (Table 4). They were followed by G03 Sex hormones (+6%), R01 Nasal preparations (+10%) and N02 Analgesics (+6%) that improved their positions. ATC group SPINRAZA (+11%) also showed outstripping growth rates and rose in the ranks, moving one rank up, to number nine. J01 Antibacterials for systemic use (+5%) held their previous rank eight. Three ATC groups J05 Antivirals for systemic use (-21%), B01 Antithrombotic agents (-6%) and R05 Cough and cold preparations (-3%), which showed negative growth rates, moved down to ranks six, seven and ten, respectively. The total share of the analysed ranking accounted for 37.3% vs 38.2% in a year-earlier period.

Table 4. The Top 10 ATC groups by pharmacy sales

Rank in the Top 10		ATC code	ATC group	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022			9 mon. 2023	9 mon. 2022
1	1	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.5	5.2
2	2	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.1	4.9
3	4	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.0	3.9
4	5	R01	NASAL PREPARATIONS	3.9	3.7
5	7	N02	ANALGESICS	3.6	3.6
6	3	J05	ANTIVIRALS FOR SYSTEMIC USE	3.3	4.4
7	6	B01	ANTITHROMBOTIC AGENTS	3.3	3.6
8	8	J01	ANTIBACTERIALS FOR SYST USE	3.1	3.1
9	10	C05	VASOPROTECTIVES	2.8	2.7
10	9	R05	COUGH AND COLD PREPARATIONS	2.8	3.1
Total				37.3	38.2

Conclusion. In January-September of 2023, the pharmacy market of the Far Eastern Federal District brought in RUB 55.862 bil. (USD 683.405 mil.), which was 3% more in terms of roubles and 13% less in terms of dollars than in the same period of 2022. In pack terms, the market reduced by 5% compared to the previous year and amounted to 187.078 mil. packs. The average cost of OTC drug pack in the FEFD pharmacies according to the results for 9 months of 2023 was USD 3.65, which was less than the January-September 2022 figure (USE 3.97) and the national average across the country (USD 4.09). The average drug expenses of the district residents were also lower than the national average expenses in Russia (86.46 USD vs. 90.09 USD).

* Here and elsewhere IQVIA's data are used