СОВМЕСТНАЯ ПУБЛИКАЦИЯ
АССОЦИАЦИИ МЕЖДУНАРОДНЫХ ФАРМАЦЕВТИЧЕСКИХ ПРОИЗВОДИТЕЛЕЙ И ГК РЕМЕДИУМ

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ГРУППА КОМПАНИЙ

AIPM®
Association of International Pharmaceutical Manufacturers
Ассоциация международных фармацевтических производителей

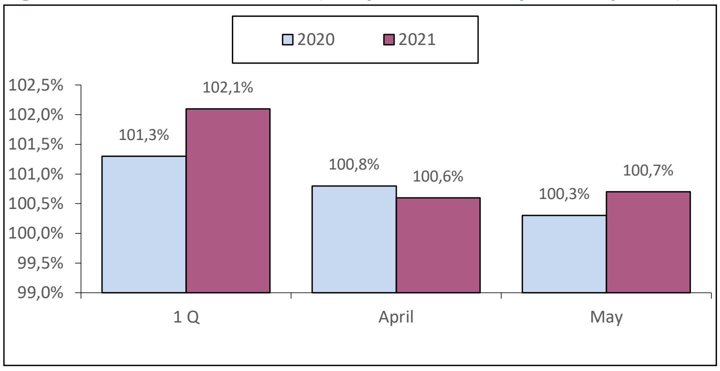
MACROECONOMIC INDICES

Inflation

According to Federal State Statistics Service's data, the Consumer Price Index was estimated at 100.7% in May 2021 as compared to the previous month, 103.5% vs December 2020.

In May 2021, Industrial Producer Price Index was 102.3% as compared to the previous month, in the month-earlier period it had amounted to 102.7%. The index accounted for 116.5% against December of 2020.

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



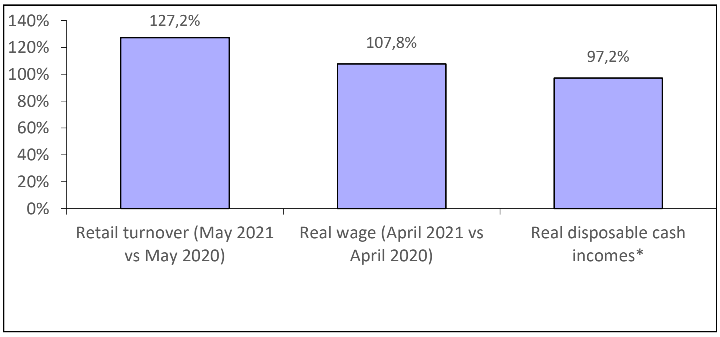
Living standard

In April of 2021, a gross monthly average wage of corporate employees reached RUB 56614 (USD 744.04). It accounted for 113.8% compared to April 2020, and 103.1% compared to the previous period. In April of 2021, the real gross wage accounted for 107.8% as compared to April of 2020, and 102.5% against the prior period. According to estimates[1], real disposable cash incomes decreased by 2.8% in the first half of 2021 as compared to the first half of 2020 (Fig. 2).

Retail turnover

In May 2021, the retail turnover was equal to RUB 3145.7 bil. or 127.2% (in comparable prices) against the respective period of the previous year, and RUB 14905.1 bil. or 110.0% in January - May 2021 (Fig. 2).

Figure 2. Real wage and retail turnover



* I Quarter 2021 vs I Quarter 2020

Industrial Production

According to Federal State Statistics Service's data, Industrial Production Index accounted for 111.8% in May of 2021 as compared to the same period in the previous year, and 103.2% in January-May of 2021.

According to Federal State Statistics Service's data, Industrial Production Index for drugs and medical products in May 2021 accounted for 100.2% compared to the same period in 2020, and 123.2% in January-May vs January-May 2020.

Domestic production

Table 1 provides the top 10 domestic pharmaceutical manufacturers according to their volumes of sales in all segments of the market based on the results for May of 2021.

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

Rank	Manufacturer	RUB mil.
1	Biocad	2515.3
2	Otcpharm	1999.4
3	Stada	1979.4
4	Pharmstandart	1685.5
5	Binnopharm	1469.9
6	Pharmasyntez	1253.0
7	Grotex	1055.5
8	Vertex	1013.2
9	Atoll	947.1
10	Sotex	933.7

Source - Remedium according to IQVIA's data

Table 2 provides pharmacy sales data from 10 regions of the Russian Federation. In April 2021 compared to the previous month, sales (in terms of roubles) reduced in all regions. The highest reduction was observed in Moscow (-21%), the lowest one in Tatarstan (-2%).

Table 2. Pharmacy sales in the regions, 2021

Region	Pharmacy sales, USD mil. (wholesale prices)			Growth gain, % (roubles)		
	February 2021	March 2021	April 2021	February/January 21	March / February 21	April/March 21
Moscow	139.3	194.9	150.5	5%	40%	-21%
St. Petersburg	51.7	74.4	61.6	-10%	44%	-15%
Krasnodar Krai	34.8	48.2	40.7	-4%	39%	-14%
Krasnoyarsk Krai	21.6	26.7	23.2	4%	23%	-11%
Tatarstan	18.3	20.6	19.7	-1%	12%	-2%
Rostov Region	24.3	29.0	24.1	-2%	19%	-15%
Novosibirsk Region	20.2	23.4	20.5	-0.3%	16%	-11%
Voronezh Region	12.1	17.0	13.8	2%	40%	-17%
Perm	9.5	10.6	9.4	7%	12%	-10%
Tyumen	7.8	9.5	8.3	6%	23%	-11%

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 May 2021

Rank	Company*	Quantity of broadcasts
1	Sanofi	9,362
2	Otcpharm	8,506
3	Sandoz	6,360
4	Dr. Reddy's Laboratories	6,261
5	Berlin-Chemie/Menarini	5,663

Source - Remedium according to Mediascope's data

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

Rank	Brand*	Quantity of broadcasts
1	Pentalgin	2,832
2	Nurofen	2,500
3	Zodac	2,090
4	Linex	2,037
5	Baneocin	1,815

Source - Remedium according to Mediascope's data

* Only drugs registered with National Medicine Register were considered.

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

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

According to IQVIA DLO in RF™, the drugs supply under the Federal Program amounted to RUB 60,364 bil. based on the results for the first three months of 2021 (USD 812.101 mil.) at contract prices. The segment volume increased 28% in terms of roubles, and 15% in terms of dollars as compared to the same period of 2020. Scope of supplies in pack terms increased by 17% to 29.367 mil. packs. The average cost of a FPP pack through the DLO program was USD 27.65 in contractual prices (a year ago it was USD 28.07).

In January-March 2021, GENERIUM (+51%) moved up to rank number one in the DLO segment, displacing the former leader CELGENE that showed a less reduction (+25%) (Table 1). The markets of TAKEDA (+85%), BIOCAD (+33%), NOVARTIS (+37%) and ROCHE (purchases increased 2.4 times) also developed at a faster pace. At the same time, all of them, except for BIOCAD, moved up to higher positions, and the latter also entered the Top-10 for the first time. OCTAPHARMA (-4%) and ASTELLAS (+9%) held their previous ranks seven and ten, while JOHNSON & JOHNSON (+5%), which showed low growth rates, and SANOFI (-17%), which reduced the volume of purchases, moved down to ranks four and nine, respectively. The total share of the top 10 drug manufacturers within DLO Program expanded from 58.4% to 61%.

Table 1. The top 10 drug manufacturers for DLO

Rank		Manufacturer*	Share in total DLO volume, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	2	GENERIUM ZAO RF	12.4	10.5
2	1	**CELGENE**	10.5	10.7
3	4	**TAKEDA**	8.9	6.2
4	3	**JOHNSON & JOHNSON**	6.4	7.8
5	5	BIOCAD RF	6.3	6.1
6	8	**NOVARTIS**	4.4	4.1
7	7	OCTAPHARMA	3.8	4.2
8	15	**ROCHE**	3.2	1.7
9	6	**SANOFI**	2.8	4.3
10	10	**ASTELLAS PHARMA**	2.3	2.7
Total			61.0	58.4

*AIPM members are in bold

The top ten brands ranking was half updated: five newcomers broke into the ranks of the top ten brands ranking (Table 2). ACELLBIA (2.6-fold growth in purchases), ELAPRASE (+61%), ADVATE (2.8-fold growth), OCREVUS (25-fold growth) and ILARIS (+44%) moved to ranks 5 through 7 and the last rank. The OCTOFACTOR brand markets (2.2-fold growth in purchases) and ELIZARIA (+84%) also developed at a high rate, which allowed them to move up to ranks two and four in the top 10 ranking. The less dynamic brands COAGIL-VII (+3%) and PLEGRIDY (+16%) moved down to ranks eight and nine. REVLIMIDE (+25%) holds the leadership. The total share of the top 10 increased by more than 8 p.p. to 35.5 %.

Table 2. The top 10 Brands in DLO segment

Rank in the top ten		Brand	Share in total DLO volume, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	1	REVLIMIDE	10.5	10.7
2	3	OCTOFACTOR	4.7	2.8
3	14	ACELLBIA	3.6	1.8
4	8	ELIZARIA	3.3	2.3
5	12	ELAPRASE	2.5	2.0
6	23	ADVATE	2.4	1.1
7	49	OCREVUS	2.2	0.1
8	6	COAGIL-VII	2.2	2.4
9	7	PLEGRIDY	2.1	2.4
10	13	ILARIS	2.1	1.9
Total			35.5	27.3

Just as the corresponding brand, LENALIDOMIDE (+25%) held its previous rank number one in the top 10 INN and group names ranking (Table 3). RITUXIMAB and MOROCTOCOG ALFA which purchases increased 2.4 and 2.2 times moved up to ranks two and three, respectively. The INNs in the lower half of the top 10 ranking also showed high positive ranks. ECULIZUMAB (+79%) moved up to rank six, and the newcomers IDURSULFASE (+61%), OCTOCOG ALFA (2.8-fold growth), FACTOR VIII*FACTOR VON WIL-LEBRAND (+32%) and OCRELIZUMAB (25-fold growth) rounded out the top ten ranking. FACTOR VIII (-13%) and INTERFERON BETA-1A (-15%), which showed negative growth rates, moved down to ranks four and five. The total share of the top 10 increased from 34.9% to 40.5%.

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

Rank in the top ten		INNs/Grouping Names	Share in total DLO volume, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	1	LENALIDOMIDE	10.5	10.7
2	4	RITUXIMAB	5.6	3.1
3	6	MOROCTOCOG ALFA	4.7	2.8
4	2	FACTOR VIII	3.8	5.6
5	3	INTERFERON BETA-1A	3.3	5.0
6	10	ECULIZUMAB	3.3	2.3
7	14	IDURSULFASE	2.5	2.0
8	20	OCTOCOG ALFA	2.4	1.1
9	12	FACTOR VIII*FACTOR VON WIL-LEBRAND	2.3	2.2
10	49	OCRELIZUMAB	2.2	0.1
Total			40.5	34.9

The top ten ATC groups ranking did not change its leaders either. L04 Immunosuppressants (+35%) and B02 Antihemorrhagics (+47%) secured the top ranks (Table 4). The remaining top 10 ATC groups changed their ranks; moreover, five of them improved them. L01 Antineoplastic agents (+55%), A10 Drugs used in diabetes (+28%), B01 Antithrombotic agents (+50%) and R03 Drugs for obstructive airway diseases (+32%) moved up one rank. The only newcomer of the top ten L02 Endocrine therapy (+32%) broke into the ranks of the top ten, coming in at number ten. Two groups with negative growth rates, L03 Immunostimulants (-10%) and J05 Antivirals for systemic use (-35%), as well as A16 Other alimentary tract and metabolism products (+4%) that showed low growth rates lost one rank each, and the latter lost two ranking positions. The total share of the top ten ranking expanded from 86.3% to 86.7%.

Table 4. The top ten ATC groups in DLO segment

Rank		ATC code	ATC group	Share in total DLO volume, %	
3 mon. 2021	3 mon. 2020			3 mon. 2021	3 mon. 2020
1	1	L04	IMMUNOSUPPRESSANTS	27.8	26.4
2	2	B02	ANTIHEMORRHAGICS	20.2	17.6
3	4	L01	ANTINEOPLASTIC AGENTS	10.7	8.9
4	3	L03	IMMUNOSTIMULANTS	7.2	10.2
5	6	A10	DRUGS USED IN DIABETES	6.3	6.4
6	5	A16	OTHER ALIMENTARY TRACT AND METABOLISM PRODUCTS	5.9	7.4
7	8	B01	ANTITHROMBOTIC AGENTS	3.1	2.6
8	9	R03	DRUGS FOR OBSTRUCTIVE AIRWAY DISEASES	2.2	2.1
9	7	J05	ANTIVIRALS FOR SYSTEMIC USE	1.6	3.2
10	12	L02	ENDOCRINE THERAPY	1.6	1.5
Total				86.7	86.3

Data on supplies to the top ten regions of Russia under State Reimbursement Program (DLO) are shown in Table 5. Moscow continued to demonstrate the largest volumes of purchases though it increased its share in total volume reduced to 13.9%. Krasnodar Territory remains the second with a share of 3.7%. The Sverdlovsk and Moscow regions moved up to ranks three and four. St. Petersburg, which used to enter the top five regions in the segment, dropped out of the top-10 ranking due to a 35% decrease in purchases, while the Novosibirsk Region, Bashkortostan, and Krasnoyarsk Territory, in contrast, broke into the top ten ranking. The total share of the top 10 brands did not virtually change: 40,5% vs 40,6% in the year-earlier period.

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

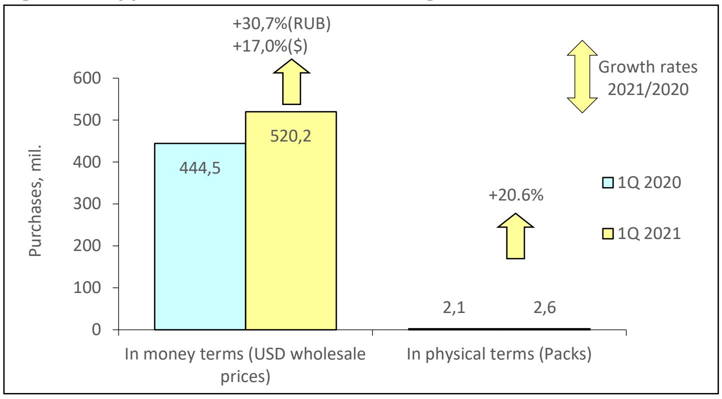
Rank		Region	Share in total DLO volume, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	1	Moscow	13.9	18.2
2	2	Krasnodar Krai	3.7	3.7
3	4	Sverdlovsk Region	3.5	3.1
4	8	Moscow Region	3.4	2.4
5	3	Tatarstan Republic	2.9	3.1
6	6	Rostov Region	2.9	2.5
7	11	Novosibirsk Region	2.7	2.3
8	24	Bashkortostan Republic	2.5	1.3
9	17	Krasnoyarsk Region	2.5	1.6
10	7	Tyumen Region	2.4	2.5
Total			40.5	40.6

Conclusion. Based on the results for the first quarter 2021, the DLO segment brought in RUB 60.364 bil. (USD 812.101 bil.) at contractual prices, which was by 28% in terms of roubles and by 15% in terms of dollars more than in the same period of 2020. In pack terms, the supplies under the program increased by 17% to 29.367 mil. packs. The average cost of FPP included in the DLO Programme decreased as compared to the past year (USD 27.65 vs USD 28.07).

COST DEMANDING NOSOLOGIES (VZN) PROGRAM 1Q 2021

In the first quarter of 2021, supplies under the VZN drug supply program (according to IQVIA) in value terms increased by 17%, amounting to USD 520 bil. (RUB 38.7 bil.) as compared to quarter 1, 2021. in terms of packs, VZN purchases increased by 20.6% (2.6 mil. packs).

Figure 1. Supplies trend under the DLO Program in 1 Q, 2021 vs 1 Q, 2020



The groups of drugs to treat hemolytic uremic syndrome (+104%), cystic fibrosis (+71%) and drugs to treat hemophilia (+49%) showed the largest increase in purchases in terms of roubles as compared to the same period of the previous year. A negative increase in purchases was recorded in the groups of drugs to treat pituitary dwarfism (-96%) and Gaucher disease (-6%). The group of drugs to treat hemophilia became the leader of the top purchases ranking in the first quarter of 2021, oncohematological drugs and agents for the treatment of multiple sclerosis moved up to ranks two and three, respectively.

Table 1. Supplies pattern under the VZN Program

Nosologies	INN	Share in total VZN supplies (RUB), %	
		1Q 2021	1Q 2020
Haemophilia		30.5	26.8
	MOROCTOCOG ALFA	7.3	4.4
	FACTOR VIII	5.9	8.8
	FACTOR VON WILLEBRAND*FACTOR VIII	4.6	4.5
	OCTOCOG ALFA	3.7	1.7
	EPTACOG ALFA (ACTIVATED)	3.4	3.9
	FACTOR VIII INHIBITOR BYPASSING FRACTION	2.5	1.5
	FACTOR IX	2.4	1.4
	NONACOG ALFA	0.7	0.6
Oncohematology		**28.6**	**27.3**
	LENALIDOMIDE	16.4	17.1
	RITUXIMAB	8.6	4.4
	DARATUMUMAB	2.3	4.6
	BORTEZOMIB	0.8	0.8
	FLUDARABINE	0.3	0.3
	IMATINIB	0.2	0.2
Sclerosis Multiplex		**18.6**	**22.7**
	INTERFERON BETA-1A	5.0	7.9
	PEGINTERFERON BETA-1A	3.3	3.7
	OCRELIZUMAB	3.2	0.0
	TERIFLUNOMIDE	2.8	3.7
	NATALIZUMAB	1.6	1.7
	INTERFERON BETA-1B	1.5	2.8
	GLATIRAMER ACETATE	1.1	1.6
	ALEMTUZUMAB	0.1	1.4
Mucopolysaccharidosis type I, II and VI		**7.0**	**9.0**
	IDURSULFASE	3.9	3.1
	GALSULFASE	1.9	3.8
	LARONIDASE	1.2	1.8
	IDURSULFASE BETA	0.0	0.2
Hemolytic-uremic syndrome		**4.7**	**3.0**
	ECULIZUMAB	4.7	3.0
Transplantation		**4.4**	**4.2**
	TACROLIMUS	2.8	3.5
	MYCOPHENOLIC ACID	1.0	0.5
	EVEROLIMUS	0.4	0.0
	CICLOSPORIN	0.1	0.2
	MYCOPHENOLATE MOFETIL	0.1	0.0
Systemic-onset juvenile arthritis		**3.4**	**3.7**
	CANAKINUMAB	3.1	2.8
	TOCILIZUMAB	0.2	0.8
	ETANERCEPT	0.1	0.0
	ADALIMUMAB	0.0	0.0
Mucoviscidosis		**1.7**	**1.3**
	DORNASE ALFA	1.7	1.3
Gaucher disease		**1.1**	**1.6**
	VELAGLUCERASE ALFA	1.1	0.3
	IMIGLUCERASE	0.1	1.2
Pituitary dwarfism		**0.0**	**0.4**
	SOMATROPIN	0.0	0.4

In the first quarter of 2020, Generium moved up to rank number one in the top ten manufacturers ranking (Table 3). The purchases of drugs produced by this company increased by 54%, and the share in the supply pattern under the VZN program grew from 16% to 19%. The main growth was provided by an increase in purchases of Octofactor (+116) for the treatment of hemophilia and the biosimilar Elizaria (+107%) for the treatment of atypical hemolytic-uremic syndrome. Elizaria moved up from rank 11 to 5 in the top brands ranking, and Octofactor moved up from rank 3 to 2 (Table 2). The top ten ranking also includes Coagil VII (rank 7 in the ranking). Celgene moved down to rank two in the top ten manufacturers ranking. Revlimid, the only drug of the company that takes the lead in the top brands ranking, increased its share in the supply pattern from 9% to 11% (Table 2). Takeda moved to rank three in the top ten manufacturers ranking. The purchases of Takeda drugs increased by 90% as compared to the same period of the previous year, and the share in the VZN segment pattern grew from 9% to 13% (Table 3). Elaprase to treat mucopolysaccharidosis type II (+60%) and recombinant coagulation factor VIII Advate made up the main volume of sales of the company. Both drugs broke into the top ten brands ranking and moved up to ranks four through six (Table 2).

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

Rank		Brand	Share in total VZN supplies, %	
1Q 2021	1Q 2020		1Q 2021	1Q 2020
1	1	REVLIMIDE	10.6	9.1
2	3	OCTOFACTOR	4.8	2.4
3	15	ACELLBIA	3.5	1.3
4	13	ELIZARIA	3.0	1.6
5	11	ELAPRASE	2.5	1.7
6	22	ADVATE	2.4	0.9
7	6	COAGIL-VII	2.2	2.0
8	7	PLEGRIDY	2.1	2.0
9	69	OCREVUS	2.1	0.0
10	14	ILARIS	2.0	1.5
Total			35.2	27.6

Biocad moved down to rank 4 in the top ten manufacturers ranking. Acellbia (Rituximab) (+199%), the leading drug of the company, moved to rank three in the top ten brands ranking. Johnson & Johnson's sales decreased by 6% as compared to 1 Q, 2020, which resulted in the loss of two ranks in the top ten companies ranking (from rank 3 to 5). This may be due to a decrease in purchases of Darzalex (Daratumumab) indicated for the treatment of multiple myeloma (-34%). The company's new drug for the treatment of multiple sclerosis, Plegridy (Peginterferon beta-1a), remained in the top 10 ranking composition, but moved down from rank 7 to 8. Ocrevus (Ocrelizumab), Roche's new drug for the treatment of multiple sclerosis, which purchases in the first quarter of 2021 amounted to more than RUB 1.2 bil., broke into the top ten brands ranking for the first time (rank 9), which allowed Roche to move up from rank 15 to 7 in the top ten manufacturers ranking. Ilaris (Canakinumab) Novartis, a drug for the treatment of systemic-onset juvenile arthritis rounded out the top 10 brand ranking. The purchases of the drug increased by 44%, and the company's position in the top ten manufacturers ranking has significantly improved (from rank 13 to 8).

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

Rank in the top ten		Manufacturer*	Share in total VZN supplies, %	
1Q 2021	1Q 2020		1Q 2021	1Q 2020
1	2	GENERIUM ZAO RF	18.8	16.0
2	1	CELGENE	16.4	17.1
3	4	**TAKEDA**	13.4	9.3
4	5	BIOCAD RF	8.3	8.3
5	3	**JOHNSON & JOHNSON**	7.2	10.0
6	6	OCTAPHARMA	5.6	6.4
7	15	**ROCHE**	3.8	1.3
8	13	**NOVARTIS**	3.6	3.0
9	7	**CSL BEHRING GMBH**	3.0	4.3
10	14	DR REDDYS LAB	2.8	1.7
Total			83.0	82.7

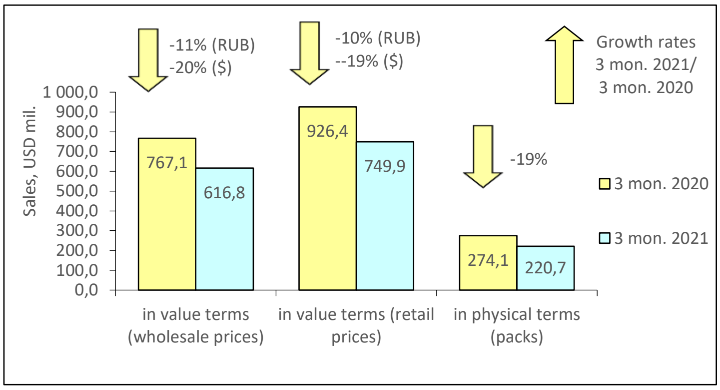
*AIPM members are in bold

Conclusion: In the first quarter of 2021, the purchases under the VSN Program significantly increased as compared to the first quarter of 2021. The share of domestic drugs increased from 27% to 32%, a share of localized products (the final manufacturing stages) reduced from 38% to 33%. The share of localized products (local manufacturing content of the FPP stage) and the share of imported drugs did not virtually change, accounting for 8% and 26%, respectively.

CFD PHARMACY MARKET (WITHOUT MOSCOW): FIRST THREE MONTHS RESULTS 2021

According to Federal State Statistics Service, as of January 1, 2021, estimated population of the Central Federal District (CFD) (without Moscow) was 26.596 mil., which accounted for 18.2% of the total Russian Federation population. According to Federal State Statistics Service's data, based on the results for January-March 2021 the average wage in CFD (with Moscow) was RUB 67477 (USD 907.68), which was 29% higher than the average wage in Russia (RUB 52143). According to the results of the Retail Audit of Finished Pharma Products (FPP) in Russian Federation™, at the end of the first three months of 2021, the volume of sales of drugs in physical terms in the CFD (excl. of Moscow) did not virtually change and totalled to 220.724 mil. packs. In value terms, the market volume also decreased: 11% in terms of roubles and 20 % in terms of dollars. At the same time, the volume of the market achieved RUB 45.835 bil. (USD 616.799 mil.) in wholesale prices (Fig. 1). The region market share accounted for 20.7% of the Russian pharmacy retail sales. The average cost of a pack did not virtually change as compared to the same period of 2020 and amounted to USD 3.40 vs 3.38 at retail prices. At the end of January-March 2021, an average amount spent by the region residents for FPPs in the pharmacies amounted to USD 28.19.

Figure 1. The CFD (excl. of Moscow) pharmacy market for 3 months 2020 – 3 months 2021



At the end of the first three months of 2021, BAYER (+6%) retained and strengthened its previous rank number one on the pharmacy market of the Central Federal District (CFD) (excl. Moscow) (Table 1). The remarkable thing is that it is the only one out of ten leaders, which showed positive dynamics. The sales of other manufacturers from the top 10 ranking, most notably those of GLAXOSMITHKLINE (-19%), SANOFI (-17%) and KRKA (-14%), declined, which resulted in the loss of their ranking positions. STADA (-12%) also lost one point. SERVIER and BERLIN-CHEMIE/MENARINI that decreased sales by 13% and 10% managed to hold their previous ranks six and eight, while OTCPHARM (-6%), TEVA (-9%) and ABBOTT (-8%) moved to ranks two, five and nine despite the negative growth rates. The total share of the top ten increased by 0.3 pp. and accounted for 35.3%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	1	BAYER	5.2	4.4
2	4	OTCPHARM	3.9	3.8
3	2	SANOFI	3.9	4.1
4	3	STADA	3.8	3.9
5	7	TEVA	3.3	3.3
6	6	SERVIER	3.3	3.4
7	5	KRKA	3.3	3.4
8	8	MENARINI	3.0	3.0
9	11	ABBOTT	2.8	2.7
10	9	GLAXOSMITHKLINE	2.7	3.0
Total			35.3	35.0

*AIPM members are in bold

The top 10 leading brands showed positive dynamics in six of its brands (Table 2). Among them is the top 10 leader XARELTO (+41%). ELIQUIS (+94%), one of three newcomers, moved up to rank two, while two others, HEPTRAL (+50%) and PENTALGIN (-6%), rounded out the top ten ranking. High positive dynamics allowed the ARBIDOL brand (+35%) to move up to rank three from eight, displacing MEXIDOL (+0.2%), which showed almost zero growth rates, down one rank. DETRALEX moved up to rank five from seven, increasing sales by 0.5%. In contrast, CONCOR (-10%), INGAVIRIN (-32%) and NUROFEN (-20%), which reduced their sales, moved down to ranks six through nine, respectively. The total share of the top ten brands ranking increased by almost 2 p.p. and achieved 9.0%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	1	XARELTO	1.8	1.1
2	12	ELIQUIS	1.3	0.6
3	8	ARBIDOL	1.0	0.6
4	3	MEXIDOL	0.8	0.8
5	7	DETRALEX	0.8	0.7
6	5	CONCOR	0.8	0.7
7	2	INGAVIRIN	0.7	0.9
8	6	NUROFEN	0.6	0.7
9	26	HEPTRAL	0.6	0.4
10	13	PENTALGIN	0.6	0.6
Total			9.0	7.1

In contrast to the previous top ten rankings, the top ten INNs and group names ranking changed its leader (Table 3). RIVAROXABAN (+41%) moved up to rank one from two, displacing the former leader XYLOMETAZOLINE (-12%) one rank down. Another three brand names improved their positions. They were the newcomers APIXABAN (+94%) and UMIFENOVIR (+29%), which broke into the top ten ranking for the first time, as well as the composition DIOSMIN*HESPERIDIN that increased sales by 9% and came in at rank four. At the same time, BISOPROLOL (-9%), PANCREATIN (-8%), NIMESULIDE (-12%) and IBUPROFEN (-8%) reduced their sales and moved down to ranks five, six, eight and nine, respectively. ETHYLMETHYLHYDROXYPYRIDINE (+1%) rounding out the top 10 also lost one ranking point. The total share of the top 10 increased from 10.1% to 12.1%.

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

Rank		INNs/Grouping Names	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	2	RIVAROXABAN	1.8	1.1
2	1	XYLOMETAZOLINE	1.7	1.7
3	21	APIXABAN	1.3	0.6
4	6	DIOSMIN*HESPERIDIN	1.2	1.0
5	3	BISOPROLOL	1.2	1.1
6	5	PANCREATIN	1.0	1.0
7	13	UMIFENOVIR	1.0	0.7
8	4	NIMESULIDE	1.0	1.0
9	7	IBUPROFEN	1.0	1.0
10	9	ETHYLMETHYLHYDROXYPYRIDINE	0.9	0.8
Total			12.1	10.1

C09 Agents acting on the rennin-angiotensin system (-11%) continued to show the largest sales on the regional market among the top ATC groups (Table 4). The most dynamic among the leaders B01 Antithrombotic agents (+26%) was ranked second based on the results for the second quarter. The group C05 Vasoprotectives (+1%), which became the only newcomer, also showed positive dynamics. Despite the decline in sales, J01 Antibacterials for systemic use (-19%), N02 Analgesics (-16%) and G03 Sex hormones (-8%) moved up to ranks three and six, displacing M01 Anti-inflammatory and antirheumatic drugs (-13 %) and J05 Antivirals for systemic use (-28%). R01 Nasal preparations (-16%) and N06 Psychoanaleptics (7%) held their previous ranks four and ten. In total, the top ten ATC groups accumulated 38.8% of the regional market, whereas in the year-earlier period they accounted for 38.4%.

Table 4. The top ten ATC Groups by pharmacy sales

Rank		ATC code	ATC group	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020			3 mon. 2021	3 mon. 2020
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.8	5.9
2	5	B01	ANTITHROMBOTIC AGENTS	5.5	3.9
3	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.7	4.8
4	4	R01	NASAL PREPARATIONS	3.8	4.1
5	6	J01	ANTIBACTERIALS FOR SYST USE	3.4	3.7
6	3	J05	ANTIVIRALS FOR SYSTEMIC USE	3.4	4.2
7	8	N02	ANALGESICS	3.3	3.5
8	9	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.1	3.0
9	11	C05	VASOPROTECTIVES	2.9	2.6
10	10	N06	PSYCHOANALEPTICS	2.9	2.7
Total				38.8	38.4

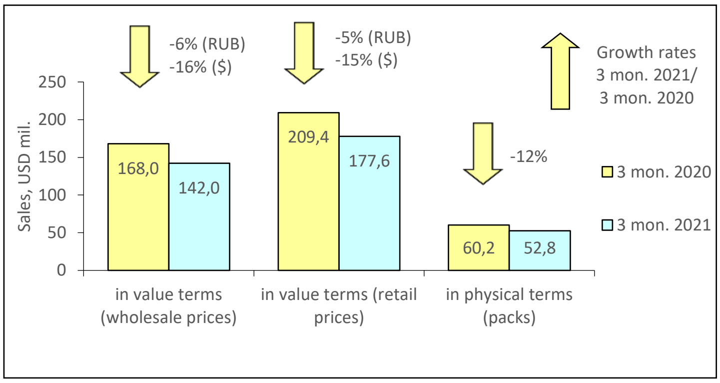
Conclusion. At the end of the first three months of 2021, the pharmacy market of the Central Federal District (excl. of Moscow) brought in RUB 45.835 bil. (USD 616.799 mil.). which was 11% in terms of roubles and 20% in terms of dollars less than in the same period of 2020. In pack terms, the market also showed negative growth rates (-19%) and achieved 220.724 mil. packs. In January-March 2021, the average cost of an FPP pack in the region pharmacies was USD 3.40, which was lower than the last year figure (USD 3.38), and less than the national average (USD 3.39). However, the average medicine expenses of the CFD residents were higher than the national average expenses in Russia (USD 28.19 vs. USD 24.78).

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

According to Federal State Statistics Service, as of January 1, 2021, estimated population of the North-Western Federal District (NWFD) (exclusive of St. Petersburg) was 8.558 mil., which accounted for 5.9% of the total Russian Federation population. According to Federal State Statistics Service's data, based on the results for January-March 2021 the average wage in NWFD (inc. St. Petersburg) was RUB 58493 (USD 786.83), which was 12% higher than the average wage in Russia (RUB 52143).

According to the results of the IQVIA Retail Audit of Finished Pharma Products (FPP) in the Russian Federation™, at the end of the first quarter of 2021 the sales of drugs in physical terms in the NWFD (excl. of St. Petersburg) saw a 12% decrease to 52.777 mil. packs. In money terms, the market saw a 6% decrease in terms of roubles, and 16% in terms of dollars. At the same time, the volume of the market achieved RUB 10.550 bil. (USD 141.968 mil.) at wholesale prices (Fig. 1). The share of the region accounted for 4.9% of the Russian retail pharmacy sales. The average cost of an OTC pack in the pharmacies reduced: USD 3.37 vs. USD 3.48 at retail prices in the year-earlier period. For three months of 2021, the average amount spent on drugs by residents of the region in the pharmacies amounted to USD 20.76.

Figure 1. The NWFD (excl. of St. Petersburg) pharmacy market for 3 months of 2020 – 3 months 2021



At the end of the first quarter of 2021, BAYER (+7%) and OTCPHARM (-1%) retained and strengthened their leading positions in the top ten manufacturers ranking of the NWFD pharmacy market (excl. of St. Petersburg) (Table 1). STADA (+1%) and SERVIER (-9%) moved up to ranks three and four, displacing SANOFI (-13%) and KRKA (-15%) two ranks down. GEDEON RICHTER (-7%) and BERLIN-CHEMIE/MENARINI (+1%) moved one rank up, coming in at ranks eight and ten. Keep in mind that the latter became the only newcomer of the top-10 ranking. TEVA (-6%) held its previous rank seven, while SANDOZ (-13%) moved down to rank nine. The total share of the top 10 manufacturers increased from 37.2% to 37.5%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	1	BAYER	5.3	4.7
2	2	OTCPHARM	4.7	4.4
3	6	STADA	3.9	3.7
4	5	SERVIER	3.8	4.0
5	3	SANOFI	3.7	4.1
6	4	KRKA	3.6	4.0
7	7	TEVA	3.4	3.4
8	9	GEDEON RICHTER	3.1	3.2
9	8	SANDOZ	3.1	3.3
10	11	BERLIN-CHEMIE/MENARINI	2.8	2.6
Total			37.5	37.2

*AIPM members are in bold

Two newcomers, CARDIOMAGNYL (+4%) and AMOKSIKLAV (+1%) broke into the ranks of the top ten ranking, moving to the last two ranks (Table 2). In addition, another four brands of the top ten ranking managed to rise in the ranks. ARBIDOL (+90%) moved up to rank one, and ELIQUIS (+28%), CONCOR (-3%) and DETRALEX (-1%) moved up to ranks three, four and seven. At the same time, the former displaced XARELTO brand (+23%), which had previously been the leader, but showed less sales growth, one rank down. Three brands with pronounced negative growth rates also fell in the ranks: NUROFEN (-22%), INGAVIRIN (20%) and LORISTA (-19%). The total share of the top ten brands ranking increased by 1.3 p.p. and achieved 9.1%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	4	ARBIDOL	1.6	0.8
2	1	XARELTO	1.5	1.2
3	7	ELIQUIS	1.0	0.8
4	5	CONCOR	0.8	0.8
5	2	NUROFEN	0.8	1.0
6	3	INGAVIRIN	0.7	0.9
7	8	DETRALEX	0.7	0.6
8	6	LORISTA	0.7	0.8
9	13	CARDIOMAGNYL	0.6	0.5
10	12	AMOKSIKLAV	0.6	0.5
Total			9.1	7.8

UMIFENOVIR (+85%), which became one of two newcomers of the top ten ranking, moved up to rank number one in the top ten INN and group names ranking (Table 3). The second one, APIXABAN (+28%), moved up to rank eight. INNs RIVAROXABAN (+23%) and the composition DIOSMIN+HESPERIDIN (+10%) also moved up to the higher ranks two and six. At the same time, XYLOMETAZOLINE (-5%), BISOPROLOL (-2%), IBUPROFEN (-8%), NIMESULIDE (-4%) and LOSARTAN (-11%), which showed negative growth rates, moved down to the lower ranks. And only ATORVASTATIN (+2%) held its previous rank nine. In total, ten INNs and group names accounted for 12.2% against 10.5% in the year-earlier period.

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

Rank in the top ten		INNs/Grouping Names	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	12	UMIFENOVIR	1.7	0.8
2	4	RIVAROXABAN	1.5	1.2
3	1	XYLOMETAZOLINE	1.5	1.5
4	3	BISOPROLOL	1.3	1.2
5	2	IBUPROFEN	1.2	1.2
6	7	DIOSMIN*HESPERIDIN	1.1	1.0
7	5	NIMESULIDE	1.0	1.0
8	15	APIXABAN	1.0	0.8
9	9	ATORVASTATIN	1.0	0.9
10	6	LOSARTAN	0.9	1.0
Total			12.2	10.5

C09 Drugs acting on the renin-angiotensin system and M01 Anti-inflammatory and antirheumatic drugs continue to remain the leaders in the ATC group ranking, despite a 5% reduction in their sales (Table 4). B01 Antithrombotic agents (+17%) and G03 Sex hormones (+4%), which showed positive dynamics, moved up to ranks three and four. A11 Vitamins (+13%) also showed a sales growth, improving their positions by one rank and coming in at rank nine. J01 Antibacterials for systemic use (-10%) also rose in the ranks, moving one rank up to number seven. In contrast, the remaining ATC groups moved down to the lower ranks. Antivirals for systemic use (-15%), R01 Nasal preparations (-9%), R05 Cough and cold preparations (-20%) and N02 Analgesics (-17%) moved down to ranks fife, six, eighth and the last rank, respectively. The top ten ATC groups accounted for 40.7% of the regional pharmacy sales, 40.6% in the year-earlier period.

Table 4. The top ten ATC Groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020			3 mon. 2021	3 mon. 2020
1	1	C09	- AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	6.4	6.5
2	2	M01	- ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.1	5.1
3	6	B01	- ANTITHROMBOTIC AGENTS	4.6	3.7
4	7	G03	- SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.0	3.7
5	3	J05	- ANTIVIRALS FOR SYSTEMIC USE	4.0	4.5
6	4	R01	- NASAL PREPARATIONS	3.7	3.9
7	8	J01	- ANTIBACTERIALS FOR SYSTEMIC USE	3.3	3.5
8	5		R05 - COUGH AND COLD PREPARATIONS	3.2	3.8
9	10	A11	- VITAMINS	3.2	2.7
10	9	N02	- ANALGESICS	3.0	3.4
Total				40.7	40.6

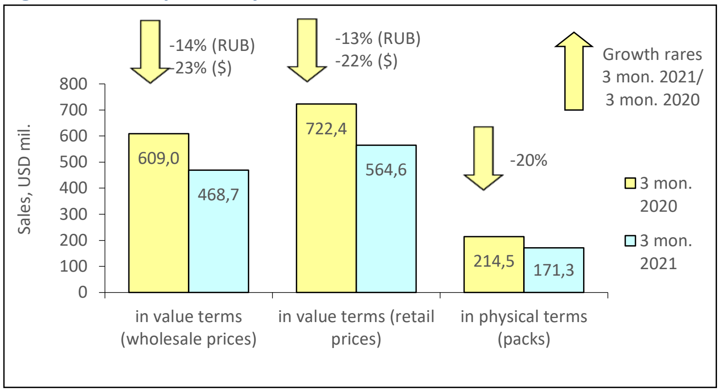
Conclusion. In January-March of 2021, the pharmacy market of the NWFD (excl. of St Petersburg) brought in RUB 13.200 bil. (USD 177.626 mil.), which was 5% in terms of roubles and 15% in terms of dollars less than in the same period of 2020. In physical terms, the market reduced by 12% and amounted to 52.777 mil. packs. The average cost of an FPP pack in the regional pharmacies was USD 3.37 according to the results for 2021, which was virtually the same as compared to the 2020 figure. (USE 3.48), but lower than the national average across the country (USD 3.55). The FPP expenses of the district residents were lower than the national average expenses throughout Russia (USD 20.76 vs USD 24.78).

VFD PHARMACY MARKET: FIRST THREE MONTHS RESULTS 2021

According to the Federal State Statistics Service, as of January 1, 2021, estimated population of the Volga Federal District (VFD. 29.071 mil., which accounted for 19.9% of the total Russian Federation population. According to Federal State Statistics Service's data, in January-March 2021, the average salary in the VFD was RUB 37141 (USD 499.61), which was 29% lower than the national average wage in Russia (RUB 52143).

According to the results of IQVIA Retail Audit of OTC drugs in Russian Federation™, in January-March 2021 the pharmacy market of VFD in pack terms reduced by 20% to 171.347 mil. packs as compared to the previous year (Fig. 1) The sales in terms of wholesale prices decreased by 14% in terms of roubles and 23% in terms of dollars and reached RUB 34.831 bil. (USD 468.725 bil.). A region's share in the total pharmacy sales in Russia accounted for 15.6%. Based on the results for the first three months of 2021, the average cost of a FPP in the VFD pharmacies decreased as compared with the year-earlier period (USD 3.37) and was equal to USD 3.29. The average per capita expenses for purchase of drugs in the pharmacies were estimated at USD 19.42.

Figure 1. Russia pharmacy market for 3 months 2020 – 3 months 2021



Just as the greater market, all top ten manufacturers on the retail Volga Federal District market, showed negative growth rates based on the results for the first quarter of 2021 (Table 1). OTCPHARM (-9%) and BAYER (-7%) remained the leaders of the top ten ranking. Some shifts took place in the lower part of the top ten ranking, as a result of which five manufacturers rose in the ranks. STADA (-12%), KRKA (-11%), ABBOTT (-12%), SERVIER (-17%) and BERLIN-CHEMIE / MENARINI (19%) moved one rank up, to numbers three, five and seven through nine, respectively. At the same time, SANOFI (-16%), TEVA (-19%) and SANDOZ (-28%) moved down to the lower ranks four, six and ten, respectively. The total share of the top 10 brands didn't virtually change and accounted for 32.3%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	1	OTCPHARM	4.3	4.1
2	2	**BAYER**	4.1	3.8
3	4	**STADA**	3.5	3.4
4	3	**SANOFI**	3.5	3.6
5	6	**KRKA**	3.2	3.1
6	5	**TEVA**	3.0	3.1
7	8	**ABBOTT**	2.9	2.9
8	9	**SERVIER**	2.7	2.8
9	10	**BERLIN-CHEMIE/MENARINI**	2.5	2.6
10	7	**SANDOZ**	2.5	2.9
Total			32.3	32.4

*AIPM members are in bold

Four of the top brands showed positive dynamics: XARELTO (+27%), ARBIDOL (+58%), ELIQUIS (+92%) moved up to the top three ranks, and HEPTRAL (+28%) moved up to rank five (Table 2). On top of that, the latter two INNs broke into the ranks of the top 10 ranking for the first time. One more newcomer DETRALEX (-11%) moved up to rank nine in the top ten ranking. Despite the decrease in sales, the brands PENTALGIN (-6%) and CONCOR (-15%) also managed to improve their positions, moving up to ranks six and eight. MEXIDOL (-0.5%), which showed insignificant negative growth rates, continued to hold rank four, while ACTOVEGIN (-23%) and INGAVIRIN (-59%) that significantly reduced their sales moved down to ranks seven and ten. The total share of the top ten INN and group names ranking increased by 1.2 p.p. to 7.6%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	2	XARELTO	1.1	0.8
2	7	ARBIDOL	1.1	0.6
3	17	ELIQUIS	1.0	0.4
4	4	MEXIDOL	0.8	0.7
5	14	HEPTRAL	0.7	0.5
6	10	PENTALGIN	0.6	0.5
7	5	ACTOVEGIN	0.6	0.7
8	9	CONCOR	0.6	0.6
9	11	DETRALEX	0.5	0.5
10	1	INGAVIRIN	0.5	1.1
Total			7.6	6.4

Half of the top 10 INNs and grouping names showed positive dynamics, which allowed them to move up to the higher ranks (Table 3). At the same time, three INNs UMIFENOVIR (+41%), RIVAROXABAN (+27%) and ETHYLMETHYLHYDROXYPYRIDINE (+4%) moved up to ranks two, three and six within the top ten ranking, while APIXABAN (+92%) and ADEMETIONINE (+9%) broke into the group for the first time and moved up to ranks seven and ten. They pushed INN PANCREATIN (-9%) and BISOPROLOL (-8%) one rank down, DIOSMIN*HESPERIDIN (-5%) two ranks down, while IBUPROFEN, which reduced sales by 19%, moved down from rank five to nine. XYLOMETAZOLINE (-12%) held its previous rank one in the ranking. In total, the top ten INNs and group names accounted for 10.6% of the regional market vs 8.6% in the year-earlier period.

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

Rank in the top ten		INNs/Grouping Names	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	1	XYLOMETAZOLINE	1.3	1.3
2	8	UMIFENOVIR	1.3	0.8
3	9	RIVAROXABAN	1.1	0.8
4	3	PANCREATIN	1.1	1.0
5	4	BISOPROLOL	1.1	1.0
6	7	ETHYLMETHYLHYDROXYPYRIDINE	1.0	0.8
7	30	APIXABAN	1.0	0.4
8	6	DIOSMIN*HESPERIDIN	1.0	0.9
9	5	IBUPROFEN	0.9	1.0
10	16	ADEMETIONINE	0.8	0.6
Total			10.6	8.6

The top ten ATC-groups ranking did not change its leaders either. As before, C09 Agents acting on the rennin-angiotensin system (-6%) and M01 Anti-inflammatory and antirheumatic products (-17%) held their previous top ranks (Table 4), B01 Antithrombotic agents (+14%) moved up to rank three from seven, displacing J05 Antivirals for systemic use (-33%) and J01 Antibacterials for systemic use (-23%) one rank down. The groups R01 Nasal preparations (-15%) and N06 Psychoanaleptics (-11%) also moved up to the higher ranks, while G03 Sex hormones (-12%) and N02 Analgesics (-16%) held their previous ranks six and nine. R05 Cough and cold preparations (-29%), which moved down from rank five, rounded out the top ten ATC groups ranking. In total, the top ten ATC groups accumulated 37.9% of sales, whereas in the year earlier period they accounted for 38.5%.

Table 4. The top ten ATC Groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020			3 mon. 2021	3 mon. 2020
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.8	5.3
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.8	5.0
3	7	B01	ANTITHROMBOTIC AGENTS	4.4	3.3
4	3	J05	ANTIVIRALS FOR SYSTEMIC USE	3.8	4.9
5	4	J01	ANTIBACTERIALS FOR SYST USE	3.6	4.0
6	6	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.5	3.4
7	8	R01	NASAL PREPARATIONS	3.2	3.2
8	10	N06	PSYCHOANALEPTICS	3.1	3.0
9	9	N02	ANALGESICS	3.0	3.0
10	5	R05	COUGH AND COLD PREPARATIONS	2.9	3.5
Total				37.9	38.5

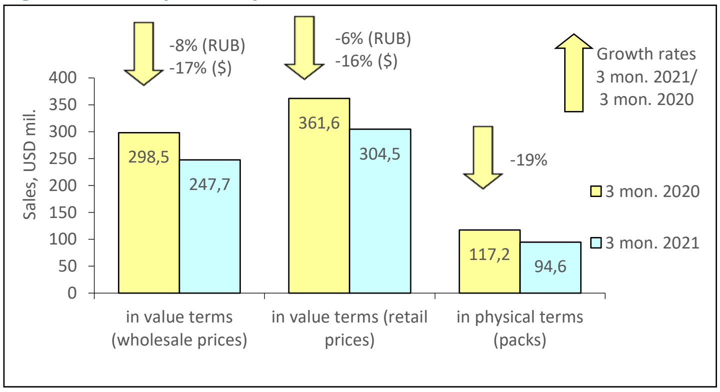
Conclusion. Based on the results for the first quarter of 2021, the pharmacy market in VFD was estimated at RUB 41.954 bil. (USD 564.590 mil.) at retail prices. At the same time, the market behaviour was negative both in rouble (-13%) and in dollar (-22%) terms. In physical terms, the sales reduced by 20% to 171.347 mil. packs. The average cost of FPP pack based on the results for January-March of 2021 was USD 3.29, which was lower as compared to the same period a year ago (USD 3.37), and the national average across Russia (USD 3.55). Per capita expenses of the district residents for purchase of medicines in the pharmacies were also lower than the national average figures (USD 19.42 vs. USD 24.78).

SOUTHERN FEDERAL DISTRICT PHARMACY MARKET: FIRST THREE MONTHS RESULTS 2021

According to the Federal State Statistics Service, as of January 1, 2021, estimated population of the Southern Federal District (SoFD) was 16.482 mil., which accounted for 11.3% of the total Russian Federation population. According to Federal State Statistics Service's data, in January-March 2021, the average salary in the SoFD was RUB 36569 (USD 491.92), which was 30% lower than the national average salary throughout Russia (RUB 52143).

According to the results of the IQVIA Retail Audit of FPP (Finished Pharmaceutical Products) in Russian Federation™, at the end of the first three months of 2021 the sales of drugs in physical terms in the Southern Federal District saw a 19% decrease to 94.648 mil. packs. In value terms, the market showed negative growth rates both in roubles equivalent (-8%), and in dollar equivalent (-17%), and reached RUB 18.409 bil. (USD 247.730 bil.) at wholesale prices (Fig. 1). The city market share accounted for 8.4% of the pharmacy sales in Russia. Based on the results for January-March 2021, the average cost of a finished pharma product (FPP) pack was USD 3.22 at retail prices vs. USD 3.08 in a year-earlier period. For the three months of 2021, the average amount spent by the residents of the SoFD for the drugs amounted to USD 18.48.

Figure 1. Russia pharmacy market for 3 months 2020 – 3 months 2021



At the end of the first quarter of 2021, the top ten manufacturers on the market of the Southern Federal District (SoFD) have yet proved stable enough: its composition has not changed, and at the same time half of the manufacturers held their positions (Table 1). BAYER (+2%), OTCPHARM (+8%), SANOFI (-11%) and STADA (-9%) held their previous top four ranks, while GLAXOSMITHKLINE (-26%) rounded out the top ten. Three manufacturers, ABBOTT and BERLIN-CHEMIE / MENARINI (-1% each), and SERVIER (-6%), moved up to ranks five through seven, respectively. At the same time, TEVA (-17%) and SANDOZ (-25%) moved down to ranks eight and nine, respectively. In total, the top ten ATC groups accounted for 32.8% of the market, whereas in the year– earlier period they had accounted for 32.9%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	1	**BAYER**	4.8	4.3
2	2	OTCPHARM	4.2	3.6
3	3	**SANOFI**	3.4	3.6
4	4	**STADA**	3.4	3.4
5	7	**ABBOTT**	3.3	3.1
6	9	**BERLIN-CHEMIE/MENARINI**	3.1	2.9
7	8	**SERVIER**	3.1	3.0
8	5	**TEVA**	2.8	3.2
9	6	**SANDOZ**	2.5	3.1
10	10	**GLAXOSMITHKLINE**	2.2	2.8
Total			32.8	32.9

*AIPM members are in bold

The leader of the top 10 brand names ranking was changed: Due to 2.5-fold growth in sales, ELIQUIS moved up to rank one from eight (Table 2). In addition to it, another five brands of the top-10 rose in the ranks. ARBIDOL (+65%) moved up to rank three from five, while the newcomers HEPTRAL (+45%), DETRALEX (+20%), CEFTRIAXONE (3.1-fold growth in sales) and PENTALGIN (+8%) broke into the top ten ranking, coming in at numbers four through six, respectively. INGAVIRIN (-58%), which reduced sales by half, moved down from rank one to eight, while ACTOVEGIN (-13%) and MEXIDOL (-5%) held their previous ranks seven and nine despite the negative growth rates. XARELTO (+39%) also held its previous rank two. The top ten ATC groups accounted for 8.7% of the regional market, whereas in the year-earlier period their share was 6.4%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	8	ELIQUIS	1.6	0.6
2	2	XARELTO	1.3	0.9
3	5	ARBIDOL	1.3	0.7
4	12	HEPTRAL	0.8	0.5
5	11	DETRALEX	0.7	0.6
6	48	CEFTRIAXONE	0.6	0.2
7	7	ACTOVEGIN	0.6	0.6
8	1	INGAVIRIN	0.6	1.3
9	9	MEXIDOL	0.6	0.6
10	15	PENTALGIN	0.6	0.5
Total			8.7	6.4

XYLOMETAZOLINE held its rank number one in the top ten INN and group names ranking, despite a 6% decrease in sales (Table 3). Due to 2.5-fold growth in sales, the newcomer APIXABAN broke into the top ten ranking, moving up to rank two. The second newcomer ADEMETIONINE (+26%) moved up to rank nine. In addition to them, another three ATC groups of the top ten showed growth in sales. UMIFENOVIR (+51%) and RIVAROXABAN (+ 39%) moved up to ranks three and four, and the composition DIOSMIN*HESPERIDIN (+ 17%) moved up to rank six. At the same time, they displaced PANCREATIN, which increased its sales by 7%, two points down to rank five. The INNs with negative growth rates NIMESULIDE (-6%), BISOPROLOL (-8%) and IBUPROFEN (-21%) moved down to the lower ranks. The total share of the top ten INNs accounted for 11.9% vs 9.4% in 2020.

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

Rank in the top ten		INNs/Grouping Names	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	1	XYLOMETAZOLINE	1.6	1.6
2	21	APIXABAN	1.6	0.6
3	8	UMIFENOVIR	1.4	0.9
4	7	RIVAROXABAN	1.3	0.9
5	3	PANCREATIN	1.3	1.1
6	9	DIOSMIN*HESPERIDIN	1.1	0.8
7	5	NIMESULIDE	1.0	1.0
8	6	BISOPROLOL	0.9	0.9
9	17	ADEMETIONINE	0.9	0.6
10	4	IBUPROFEN	0.9	1.0
Total			11.9	9.4

B01 Anticoagulants (+37%), which moved to rank one from six, demonstrated the largest sales volumes and their growth in the regional market following the results for three months of 2021 (Table 4). Another group with positive dynamics, J01 Antibacterials for systemic use (+5%), moved up to rank two from four. The remaining groups showed negative dynamics, but this did not prevent three of them from improving their positions: N02 Analgesics (-12%), G03 Sex hormones (-14%) and the newcomer N06 Psychoanaleptics (-3%) moved up to ranks seven through nine, respectively. C09 Drugs acting on the renin-angiotensin system (-8%) kept their previous rank three, while M01 Anti-inflammatory and antirheumatic drugs (-13%), J05 Antivirals for systemic use (-25%), R01 Nasal preparations (-16 %) and R05 Cough and cold preparations (-24%) moved down to ranks four through six and ten, respectively. The total share of the top 10 ATC drugs decreased by almost 0.3 p.p. to 38.8%.

Table 4. The top ten ATC Groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020			3 mon. 2021	3 mon. 2020
1	6	B01	ANTITHROMBOTIC AGENTS	5.3	3.6
2	4	J01	ANTIBACTERIALS FOR SYST USE	4.6	4.1
3	3	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	4.6	4.6
4	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.6	4.8
5	1	J05	ANTIVIRALS FOR SYSTEMIC USE	4.4	5.4
6	5	R01	NASAL PREPARATIONS	3.4	3.7
7	8	N02	ANALGESICS	3.1	3.3
8	9	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.1	3.3
9	11	N06	PSYCHOANALEPTICS	2.9	2.8
10	7	R05	COUGH AND COLD PREPARATIONS	2.8	3.4
Total				38.8	39.1

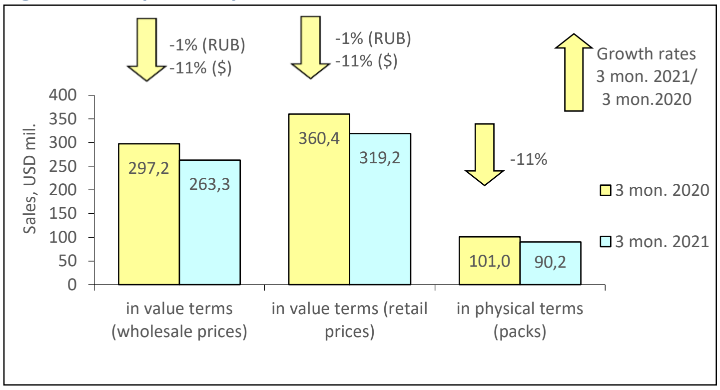
Conclusion. At the end of January-March of 2021, the pharmacy market of SoFD brought in RUB 22.629 bil. (USD 304.524 mil.) at retail prices. At the same time, the sales reduced 6% in terms of roubles and 16% in terms of dollars. In pack terms, the reduction in sales reached 19% and the volume amounted to 94.648 mil. packs. The average cost of an FPP pack in the pharmacies of the region amounted to USD 3.22, which was more than in the previous year (USD 3.08), but lower than the national average (USD 3.55). In the first quarter of 2021, the average expenses of the SoFD residents for FPPs in the pharmacies were also lower than the national average (USD 18.48 vs. USD 24.78).

UFD PHARMACY MARKET: FIRST THREE MONTHS RESULTS 2021

According to Federal State Statistics Service, as of January 1, 2021, estimated population of the Ural Federal District (UFD) was 12.330 mil., which accounted for 8.4% of the total Russian Federation population. According to Federal State Statistics Service's data, in January-March 2021, the average salary in the Ural FD was RUB 54601 (USD 734.48), which is 5% higher than the average wage in Russia (RUB 52143).

According to the results of IQVIA Retail Audit of Finished Pharma Products (FPP) in Russian Federation™, at the end of the first three months 2021 the sales of FPP drugs in physical terms in the pharmacies of UFD saw a 11% decrease to 90.172 mil. packs. In money terms, the market showed negative growth rates in terms of roubles (-1%) and in terms of dollars (-11%) and amounted to RUB 19.567 bil. (USD 263.301 mil.) in wholesale prices (Fig. 1). The regional retail sales share accounted for 8.8% of all pharmacy sales in Russia. The average retail cost of an FPP pack in the first quarter of 2021 was USD 3.54 against USD 3.57 in the year-earlier period. In the analysed period, the average amount spent by residents of the UFD for drugs amounted to USD 25.89.

Figure 1. UFD pharmacy market for 3 months 2020 – 3 months 2021



The top ten manufacturers on the Ural Federal District retail market did not change in composition following the results for January-March 2021 (Table 1). Six of the top 10 brands showed the positive sales growth rates. At the same time, three manufacturers, BAYER (+2%), OTCPHARM (+1%) and TEVA (+2%) kept and strengthened their previous ranks one, two and five. STADA (+3%), KRKA and GEDEON RICHTER (+7% each), which showed higher growth rates, moved one rank up, coming in at ranks three, eight and nine. ABBOTT (-2%) and SERVIER (-5%) that reduced their rates rose in the ranks, coming in at numbers six and seven, respectively. Another two manufacturers with negative growth rates, SANOFI (-4%) and SANDOZ (-21%), moved down to ranks four and ten. The cumulative share of the top 10 manufacturers did not virtually change and accounted for 33.4%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	1	**BAYER**	4.4	4.2
2	2	OTCPHARM	4.3	4.2
3	4	**STADA**	3.9	3.7
4	3	**SANOFI**	3.7	3.8
5	5	**TEVA**	3.4	3.2
6	7	**ABBOTT**	3.0	3.0
7	8	**SERVIER**	2.8	2.9
8	9	**KRKA**	2.8	2.6
9	10	GEDEON RICHTER	2.8	2.6
10	6	**SANDOZ**	2.4	3.0
Total			33.4	33.3

*AIPM members are in bold

Three newcomers broke into the ranks of the top ten brands (Table 2). ELIQUIS (+62%), ESSENTIALE (+11%) and LORISTA (+12%) moved up to ranks three, seven and eight. The markets of the top ten leaders ARBIDOL (+39%) and XARELTO (+26%), as well as HEPTRAL (+31%), which moved up to rank four, developed at a high pace. DETRALEX and LOZAP (-7% each) held their previous ranks five and ten. NUROFEN and INGAVIRIN, which reduced their sales by 24% and 61%, moved down to ranks six and nine, respectively. The cumulative share of the top 10 remained virtually at the level of the previous year and accounted for 6.6%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	3	ARBIDOL	1.1	0.8
2	2	XARELTO	1.0	0.8
3	13	ELIQUIS	0.8	0.5
4	8	HEPTRAL	0.7	0.5
5	5	DETRALEX	0.6	0.6
6	4	NUROFEN	0.6	0.7
7	15	ESSENTIALE	0.5	0.5
8	16	LORISTA	0.5	0.4
9	1	INGAVIRIN	0.5	1.2
10	10	LOZAP	0.5	0.5
Total			6.6	6.5

Most of the top ten INN and group names ranking showed positive growth rates and rose in the ranks (Table 3). UMIFENOVIR (+31%) that showed the highest growth rates among the leaders moved up to rank six from two. RIVAROXABAN (+26%) also showed a significant leap forward, coming in at rank five from ten. DIOSMIN*HESPERIDIN (+5%), ROSUVASTATIN (+16%) and NIMESULIDE (+1%) moved one rank up, coming in at numbers four, seven and eight. The newcomers ADEMETIONINE (+16%) and URSODEOXYCHOLIC ACID (+13%) rounded out the top ten ranking. The INNs XYLOMETAZOLINE (+ 3%) and PANCREATIN (-1%) held their previous ranks one and three. And only IBUPROFEN (-7%) lost two ranks and moved down to rank six. The cumulative share of the top 10 increased from 9% to 9.9%.

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

Rank in the top ten		INNs/Grouping Names	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	1	XYLOMETAZOLINE	1.4	1.4
2	6	UMIFENOVIR	1.2	0.9
3	3	PANCREATIN	1.1	1.1
4	5	DIOSMIN*HESPERIDIN	1.1	1.0
5	10	RIVAROXABAN	1.0	0.8
6	4	IBUPROFEN	1.0	1.0
7	8	ROSUVASTATIN	0.9	0.8
8	9	NIMESULIDE	0.8	0.8
9	15	ADEMETIONINE	0.8	0.7
10	12	URSODEOXYCHOLIC ACID	0.8	0.7
Total			9.9	9.0

Due to a 30% reduction in sales, the last year leader J05 Antivirals for systemic use moved down to rank six (Table 4). This allowed the groups C09 Drugs acting on the renin-angiotensin system (+8%), M01 Anti-inflammatory and antirheumatic drugs (-1%), G03 Sex hormones (+3%) and R01 Nasal preparations (-2%) to move one point up, coming in at ranks one through four, respectively. The other two ATC groups moved up to yet higher ranks: B01 Antithrombotic agents (+13%) moved up to rank five from nine, and A11 Vitamins, which broke into the top 10 ranking for the first time, moved up to rank eight (+21%). The groups J01 Antibacterials for systemic use (-13%) and N02 Analgesics (-7%) lost one rank each, moving down to ranks seven and nine. N06 Psychoanaleptics (-6%) rounded out the top ten ranking, as in the year-earlier period. In total, the top ten ATC-groups accumulated 37.1% of the regional market, whereas in the year-earlier period they accounted for 37.4%.

Table 4. The top ten ATC Groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020			3 mon. 2021	3 mon. 2020
1	2	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.4	4.9
2	3	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.8	4.8
3	4	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.0	3.8
4	5	R01	NASAL PREPARATIONS	3.7	3.7
5	9	B01	ANTITHROMBOTIC AGENTS	3.6	3.2
6	1	J05	ANTIVIRALS FOR SYSTEMIC USE	3.6	5.1
7	6	J01	ANTIBACTERIALS FOR SYST USE	3.1	3.5
8	14	A11	VITAMINS	3.1	2.5
9	8	N02	ANALGESICS	3.0	3.2
10	10	N06	PSYCHOANALEPTICS	2.9	2.6
Total				37.1	37.4

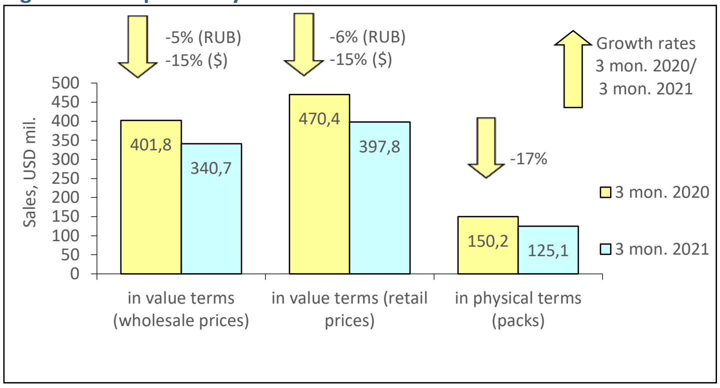
Conclusion. In January-March 2020, the pharmacy market of the Ural Federal District brought in RUB 23.719 bil. (USD 319.179 mil.) at retail prices. Объемы продаж в регионе в рублях снизились на 1%, в долларах - на 11%. In pack terms, the market also showed negative growth rates (-11%) and achieved 90.172 mil. packs. According to the results for three months of 2021, the average cost of an FPP pack in the district pharmacies was USD 3.54, which was a little bit lower than last year figures (USD 3.57), but nearly equal to the national average (USD 3.55). The average expenses of the UFD residents for medications in the pharmacies were higher than the national average (USD 25.89 vs. USD 24.78).

SiFD PHARMACY MARKET: FIRST THREE MONTHS RESULTS 2021

According to Federal State Statistics Service, as of January 1, 2021, estimated population of the Siberian Federal District (SiFD. 17.004 mil., which accounted for 11.6% of the total Russian Federation population. According to Federal State Statistics Service's data, in January-March 2021, the average salary in the SiFD was RUB 44117 (USD 593.45), which was 15% lower than the national average salary throughout Russia (RUB 52143).

According to the results of IQVIA Retail Audit of FPP drugs in Russian Federation™, in the first quarter of 2021 the SiFD pharmacy market volume in physical terms increased by 17% to 125.123 mil. packs (Fig. 1) In terms of wholesale prices, the market showed the positive performance both in terms of rouble (-5%) and dollar (-15%) equivalents and amounted to RUB 25.315 bil. (USD 340.663 mil.), The district's share accounted for 11.0% of the total pharmacy sales in the Russian pharmacy market pattern. Based on the results for January-March of 2021, the average cost of FPP in the SiFD pharmacies was USD 3.18, whereas in the year-earlier period its cost was USD 3.13. At the end of the first three months of 2021, average expenses of the SiFD residents for the purchase of FPPs in the pharmacies amounted to USD 23.39.

Figure 1. SiFD pharmacy market for 3 months 2020 – 3 months 2021



BAYER (+1%) held and reinforced its leading positions in the top ten ranking in the retail market of the Ural Federal District based on the results for January-March of 2021 (Table 1). OTCPHARM (+1%), which showed the same dynamics, moved up to rank two from three, while STADA, which had been placed at that rank earlier, dropped to rank three due to a 7% decrease in sales. SANOFI (-4%) continued to hold rank four in the ranking. The same shifts took place in the lower part of the top ten. SERVIER (-5%) and KRKA (-3%), which showed a smaller decline in sales, moved one rank up, coming in at numbers five and seven. In this connection, they displaced TEVA (-8%) and SANDOZ (-14%) one rank down. GLAXOSMITHKLINE (-20%), which had previously held rank nine, dropped outside the top ten, which allowed the manufacturers ABBOTT (-2%) and GEDEON RICHTER (-3%) to move up to ranks nine and ten. On top of that, the latter became the only newcomer of the top 10 ranking. The total share of the top 10 manufacturers increased from 33.4% to 33.8%

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	1	**BAYER**	4.5	4.2
2	3	OTCPHARM	4.0	3.7
3	2	**STADA**	3.9	4.0
4	4	**SANOFI**	3.8	3.7
5	6	**SERVIER**	3.2	3.2
6	5	**TEVA**	3.2	3.3
7	8	**KRKA**	3.2	3.1
8	7	**SANDOZ**	2.8	3.1
9	10	**ABBOTT**	2.8	2.7
10	11	GEDEON RICHTER	2.5	2.4
Total			33.8	33.4

*AIPM members are in bold

Four newcomers broke into the top-ten brand names ranking (Table 2). ELIQUIS (+49%) moved up to rank two, and MEXIDOL (+11%), HEPTRAL (+37%) and LOZAP (-2%) moved up to ranks six and the two last ranks. In addition to them, only another four brands from the top ten ranking rose in the ranks. Among them were ARBIDOL (+45%), which headed the top 10 ranking, as well as DETRALEX (+8%), PENTALGIN (-1%) and CARDIOMAGNYL (-8%), which moved to ranks four, seven and eight. Despite the positive dynamics, XARELTO brand (+9%) lost one rank, being displaced by the more dynamic brands. And only LORISTA (-7%) held its previous rank five. In total, the top ten manufacturers accumulated 7.1% of sales vs 5.9% in the year-earlier period.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	6	ARBIDOL	1.0	0.6
2	14	ELIQUIS	0.9	0.6
3	2	XARELTO	0.8	0.7
4	7	DETRALEX	0.7	0.6
5	5	LORISTA	0.7	0.7
6	13	MEXIDOL	0.6	0.6
7	10	PENTALGIN	0.6	0.6
8	9	CARDIOMAGNYL	0.6	0.6
9	22	HEPTRAL	0.6	0.4
10	12	LOZAP	0.6	0.6
Total			7.1	5.9

Three INNs from the top ten INN and group names held their own in the ranking (Table 3). The top two INNs XYLOMETAZOLINE (-12%) and BISOPROLOL (-5%) kept their previous leading ranks, and LOSARTAN (-2%) maintained its rank seven. Five INNs from the remaining ones were able to improve their positions. UMIFENOVIR (+33%) and DIOSMIN*HESPERIDIN (+12%) moved up to ranks three and four. INN PANCREATIN managed to move up to rank six from eight, although its sales decreased by 1%. The newcomers APIXABAN (+49%) and RIVAROXABAN (+9%) broke into the top ten ranking, coming in at numbers eight and nine. At the same time, IBUPROFEN (-11%) and NIMESULIDE (-8%) moved down to the lower ranks five and ten, respectively. The cumulative share of the top-ten increased by 0.8 p.p. and achieved 10.0%

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

Rank in the top ten		INNs/Grouping Names	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	1	XYLOMETAZOLINE	1.5	1.6
2	2	BISOPROLOL	1.1	1.1
3	9	UMIFENOVIR	1.1	0.8
4	5	DIOSMIN*HESPERIDIN	1.0	0.9
5	3	IBUPROFEN	1.0	1.1
6	8	PANCREATIN	0.9	0.8
7	7	LOSARTAN	0.9	0.8
8	25	APIXABAN	0.9	0.6
9	11	RIVAROXABAN	0.8	0.7
10	6	NIMESULIDE	0.8	0.9
Total			10.0	9.2

Despite the negative growth rates, C09 Agents acting on the rennin-angiotensin system (-1%) and M01 Anti-inflammatory and antirheumatic products (-4%) continued to remain the bestselling groups on the regional market (Table 4). G03 Sex hormones (+4%) and B01 Antithrombotic agents (+7%), on the contrary, moved up to ranks three and four, showing sales growth. In addition to them, only the newcomer A11 Vitamins (+11%) showed the positive growth rates. The groups R01 Nasal preparations (-12%), N02 Analgesics (-17%), J05 Antivirals for systemic use (-32%) and R05 Cough and cold preparations (-24%) were characterised by reduction in sales and fall in the ranks. J01 Antibacterials for systemic use (-20%) held their previous rank eight. The share of the top ten ATC groups amounted to 36.9%, having decreased by 1.7 percentage points as compared to the previous year.

Table 4. The top ten ATC Groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020			3 mon. 2021	3 mon. 2020
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.5	5.2
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.9	4.8
3	6	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.1	3.7
4	9	B01	ANTITHROMBOTIC AGENTS	3.6	3.2
5	4	R01	NASAL PREPARATIONS	3.5	3.8
6	5	N02	ANALGESICS	3.4	3.8
7	3	J05	ANTIVIRALS FOR SYSTEMIC USE	3.1	4.3
8	8	J01	ANTIBACTERIALS FOR SYST USE	3.0	3.5
9	7	R05	COUGH AND COLD PREPARATIONS	2.9	3.7
10	12	A11	VITAMINS	2.9	2.5
Total				36.9	38.6

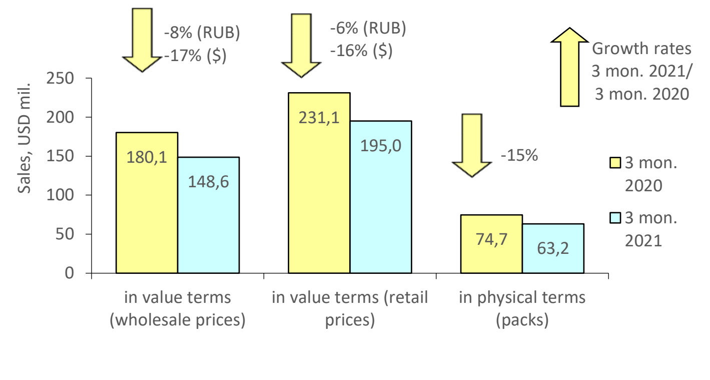
Conclusion. At the end of the first quarter of 2021, the pharmacy market in the Siberian Federal District was estimated at RUB 29.558 bil. (USD 397.757 mil.) at final consumer prices. At the same time, the market behaviour was negative both in rouble (-6%) and dollar (-15%) terms. In natural terms, the sales decreased by 17% and amounted to 125.123 mil. packs. The average cost of an FPP pack slightly increased as compared to a year earlier (USD 3.18 vs. USD 3.13) but continued to be lower than the national FPP price average in Russia (USD 3.55). Per capita expenses of the district residents for purchase of medicines in the pharmacies were also lower than the national average figures (USD 23.39 vs. USD 24.78).

FEFD PHARMACY MARKET: FIRST THREE MONTHS RESULTS 2021

According to Federal State Statistics Service, as of January 1, 2021, estimated population of the Far Eastern Federal District (FEFD) was 8.124 mil., which accounted for 5.6% of the total Russian Federation population. According to Federal State Statistics Service's data, based on the results for January-March of 2021 the average wage in FEFD was RUB 60040 (USD 807.64), which is 15% higher than the average wage in Russia (RUB 52143).

According to the results of IQVIA Retail Audit of Finished Pharma Products (FPP) in Russian Federation™, at the end of the first three months 2021 the sales of FPP drugs in physical terms in the pharmacies of FEFD saw a 15% decrease to 63.217 mil. packs. In money terms, the market saw a 8% decrease in terms of roubles, and 17% in terms of dollars. At the same time, the volume of the market amounted to RUB 11.045 bil. (USD (148.638 mil.) at wholesale prices (Fig. 1). The district's share accounted for 5.4% of the all-Russia sales in retail prices. The average cost of an OTC pack did not virtually change as compared to a year earlier and amounted to USD 3.09. At the end of the first quarter of 2021, the average amount spent by the residents of the FEFD for FPPs in pharmacies amounted to USD 24.01.

Figure 1. FEFD pharmacy market for 3 months 2020 – 3 months 2021



BAYER (+6%) held and strengthened leading positions in the top ten manufacturers ranking in the retail market of Far Eastern FD at year-end 2020 (Table 1). KRKA (-9%) managed to hold its previous rank four. Other top ten manufacturers changed their ranks; moreover, most of them improved their ranks. OTCPHARM (+3%), SANOFI (-10%) and TEVA (-11%) placed at ranks two, five and six, as well as the newcomer ABBOTT (0%) rounding out the top ten moved one rank up. SERVIER (-4%) and GEDEON RICHTER (-3%) moved two ranks up, coming in at numbers seven and eight. In this connection, they displaced STADA (-7%) one rank down and SANDOZ (-18%) from rank five to nine. The cumulative share of the top-ten increased by 1 p.p. and achieved 34.9%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	1	**BAYER**	5.0	4.3
2	3	OTCPHARM	4.3	3.9
3	2	**STADA**	4.1	4.0
4	4	**KRKA**	3.4	3.4
5	6	**SANOFI**	3.2	3.3
6	7	**TEVA**	3.2	3.3
7	9	**SERVIER**	3.2	3.0
8	10	GEDEON RICHTER	3.1	2.9
9	5	**SANDOZ**	3.0	3.3
10	11	**ABBOTT**	2.6	2.4
Total			34.9	33.9

*AIPM members are in bold

ARBIDOL (+65%) and XARELTO (+36%) moved up to the top two ranks in the top ten brands ranking from ranks four and five, while the newcomer ELIQUIS (2.4- fold growth in sales) moved up to rank three (Table 2). Another four newcomers DETRALEX (+15%), CARDIOMAGNYL (-2%), HEPTRAL (+51%) и MEXIDOL (-0,3%) moved up to ranks six, seven and the two bottom ranks. LORISTA (-5%) and CONCOR (-11%), which reduced their sales, also managed to move up to the higher positions. And only NUROFEN (-23%) lost two ranking points, moving down from rank two to four. The aggregate share of the top-10 expended from 6.3% to 8.1%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	4	ARBIDOL	1.5	0.8
2	5	XARELTO	1.1	0.7
3	35	ELIQUIS	0.9	0.3
4	2	NUROFEN	0.8	0.9
5	8	LORISTA	0.7	0.7
6	14	DETRALEX	0.7	0.5
7	12	CARDIOMAGNYL	0.7	0.6
8	9	CONCOR	0.6	0.7
9	31	HEPTRAL	0.6	0.4
10	13	MEXIDOL	0.6	0.6
Total			8.1	6.3

Despite the change of leader in the prior ranking, XYLOMETAZOLINE (-18%) held its previous rank number one in the top ten INN and group names rating (Table 3). UMIFENOVIR (+52%) moved up to rank two from five, and IBUPROFEN (-13%) held its previous rank three. RIVAROXABAN (+ 36%), one of three newcomers, moved up to rank four. Two more newcomers, APIXABAN (2.4-fold growth in sales) and METFORMIN (+2%), moved up to ranks eight and ten. The composition DIOSMIN*HESPERIDIN (+12%) also showed the positive growth rates and rose in the ranks, moving up to rank six. In contrast, three INNs, BISOPROLOL (-5%), PANCREATIN (-6%) and NIMESULIDE (-13%) moved down to the lower ranks five, seven and nine. The total share of the top 10 INNs expanded by 1.5 p.p. and accounted for 11.0%

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

Rank in the top ten		INNs/Grouping Names	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	1	XYLOMETAZOLINE	1.7	1.9
2	5	UMIFENOVIR	1.6	0.9
3	3	IBUPROFEN	1.2	1.3
4	11	RIVAROXABAN	1.1	0.7
5	4	BISOPROLOL	1.0	1.0
6	9	DIOSMIN*HESPERIDIN	1.0	0.8
7	6	PANCREATIN	0.9	0.9
8	45	APIXABAN	0.9	0.3
9	7	NIMESULIDE	0.8	0.9
10	14	METFORMIN	0.7	0.7
Total			11.0	9.5

The leader of the top-10 ATC groups ranking changed (table 4). J05 Antivirals for systemic use, which had previously headed it, reduced sales in the analysed period by 35% and moved down to rank six, which allowed the groups C09 Agents acting on the renin-angiotensin system (-5%) and M01 Anti-inflammatory and antirheumatic drugs (-8%) to move up to ranks one and two, respectively. Another three ATC groups improved their positions. Thus, B01 Antithrombotic agents (+27%) moved up to rank three from ten, G03 Sex hormones (+2%) moved up to rank five from eight, the newcomer A11 Vitamins (+4%) broke into the top ten ATC groups ranking, coming in at number nine. As before, ATC group R01 Nasal preparations (-17%) held its previous rank four. J01 Antibacterials for systemic use and N02 Analgesics (-22% each), as well as R05 Cough and cold preparations (-35%), which showed a pronounced decrease in sales, moved down to ranks seven, eight and the bottom rank, respectively. The total share of the analysed ranking accounted for 37.2% against 39.7% in a year-earlier period.

Table 4. The top ten ATC Groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020			3 mon. 2021	3 mon. 2020
1	2	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.0	4.9
2	3	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.7	4.7
3	10	B01	ANTITHROMBOTIC AGENTS	3.9	2.9
4	4	R01	NASAL PREPARATIONS	3.9	4.3
5	8	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.8	3.5
6	1	J05	ANTIVIRALS FOR SYSTEMIC USE	3.8	5.4
7	5	J01	ANTIBACTERIALS FOR SYST USE	3.3	3.9
8	7	N02	ANALGESICS	3.1	3.7
9	11	A11	VITAMINS	3.0	2.6
10	6	R05	COUGH AND COLD PREPARATIONS	2.7	3.8
Total				37.2	39.7

Conclusion. In January-March 2021, the pharmacy market of the Far Eastern Federal District brought in RUB 14.492 bil. (USD 195.024 mil.), which was 6% in terms of roubles and 16% in terms of dollars less than in the same period of 2020. In pack terms, the market also reduced (-15%) and amounted to 63.217 mil. packs. In the first quarter of 2021, the average cost of a drug pack in the FEFD district pharmacies was USD 3.09 as in the year-earlier period, which is lower than the national average (USD 3.55). The average medicine expenses of the district residents were also lower than the national average expenses in Russia (24.01 USD vs. 24.78 USD).