СОВМЕСТНАЯ ПУБЛИКАЦИЯ
АССОЦИАЦИИ МЕЖДУНАРОДНЫХ
ФАРМАЦЕВТИЧЕСКИХ
ПРОИЗВОДИТЕЛЕЙ
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AIPM®

Association of International Pharmaceutical Manufacturers

Ассоциация международных фармацевтических производителей

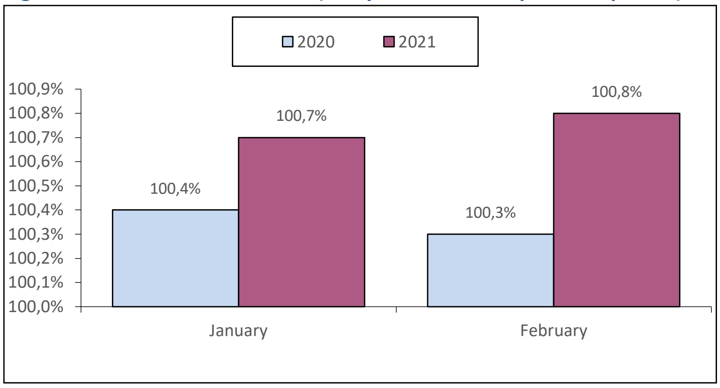
MACROECONOMIC INDICES

Inflation

According to Federal State Statistics Service's data, the Consumer Price Index was estimated as 100.8% in February 2021, compared to the previous month, and 101.5% against December 2020.

In February 2021, Industrial Producer Price Index (for goods intended for sale on the domestic market) was 103.5%, in the month-earlier period it had amounted to 103.5%. The index accounted for 107.1% against December of 2020.

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



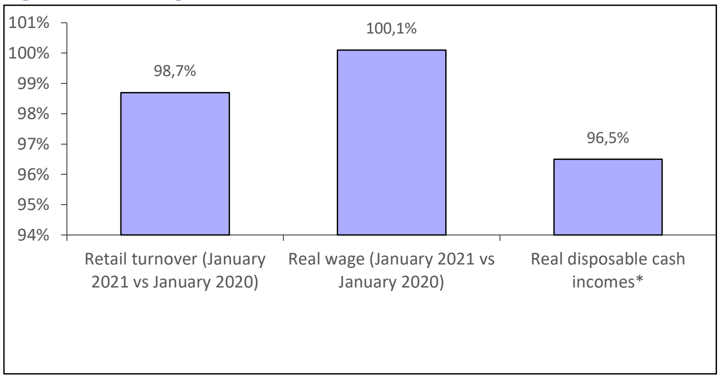
Living standard

In January 2021, a gross monthly average wage of corporate employees reached RUB 49,516 (USD 667.15). It increased by 105.3% compared to January 2020, and 71.6% compared to the previous period. In January 2021, the real gross wage accounted for 100.1% as compared to January 2020, and 71.1% against the prior period. According to estimates[1], real disposable cash incomes decreased by 3.5% in 2020 compared to 2019 (Fig. 2).

Retail turnover

In February 2021, the retail turnover was equal to RUB 2774.3 bil or 98.7% (in comparable prices) against the respective period of the previous year, and RUB 5578.0 bil. or 99.3 in January - February 2021 (Fig. 2).

Figure 2. Real wage and retail turnover



* 2020 vs 2019

Industrial Production

According to Federal State Statistics Service's data, Industrial Production Index accounted for 96.3% in February 2021 as compared to the same period in the previous year, and 97.2% in January-February of 2021.

According to Federal State Statistics Service's data, Industrial Production Index of drugs and medical products for human use accounted for 128.1% in February 2021 as compared to the relevant period of 2020, and 152.3% against December 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 February 2021.

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

Rank	Manufacturer	RUB mil.
1	Generium	3426.5
2	Otcpharm	2458.8
3	Biocad	1950.9
4	Stada	1925.9
5	Binnopharm	1417.1
6	Valenta	1379.5
7	Pharmstandart	1312.1
8	R-Pharm	1276.6
9	Grotex	972.2
10	Sotex	937.1

Source - Remedium according to IQVIA data

Table 2 provides pharmacy sales data from 10 regions of the Russian Federation. In January 2021 compared to the previous month, sales (in terms of roubles) reduced in all regions. The most significant reduction was observed in St. Petersburg (-39%) and Moscow (-38%), the least one in Perm (-19%).

Table 2. Pharmacy sales in the regions, 2020-2021

Region	Pharmacy sales, $ mil. (wholesale prices)			Growth gain, % (roubles)		
	November 2020	December 2020	January 2021	November/ October 20	December /November 20	January 21/ December 20
Moscow	160.3	212.7	132.6	-1%	28%	-38%
St. Petersburg	73.6	94.2	57.5	1%	23%	-39%
Krasnodar Krai	47.5	57.7	36.3	-4%	17%	-37%
Krasnoyarsk Krai	29.8	31.2	20.7	7%	1%	-33%
Tatarstan	25.8	25.4	18.5	-7%	-5%	-27%
Rostov Region	28.4	34.8	24.8	-15%	18%	-29%
Novosibirsk Region	30.3	28.0	20.3	2%	-11%	-27%
Voronezh Region	16.4	17.4	11.9	-12%	2%	-31%
Perm	10.0	11.0	8.9	-4%	5%	-19%
Tyumen	9.6	10.0	7.4	-1%	0.3%	-26%

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 February 2021

Rank	Company*	Quantity of broadcasts
1	Otcpharm	13,048
2	Sandoz	10,094
3	Johnson & Johnson	8,436
4	GSK Consumer Healthcare	7,906
5	Bayer	7,484

Source - Remedium according to Mediascope's data

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

Rank	Brand*	Quantity of broadcasts
1	Strepsils	3,438
2	Nurofen	3,000
3	Ergoferon	2,687
4	Otrivin	2,685
5	Complivit	2,265

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: 2020 RESULTS

According to DLO in RF™, the drug supplies under the Federal Program amounted to RUB 124.080 bil. on the basis of the results for 2020 (USD 1.756 bil.) at contract prices[2]. The sector volume increased by 9% in terms of roubles, and 0.2% in terms of dollars as compared to 2019. Scope of supplies in pack terms increased by 4% to 88. 861 mil. packs. The average cost of a FPP pack through the DLO program was USD 19.76 in contractual prices (a year ago it was USD 20.49).

In January-September 2020, GENERIUM (+28%[3]) moved up to rank number one in the DLO segment, displacing the former leader TAKEDA due to 9% reduction in purchases (Table 1). The same reshuffles took place in the lower part of the top ten ranking as well. JOHNSON & JOHNSON (+24%) and NOVARTIS (+23%) showed high growth rates, moving one rank up to numbers four and six, displacing BIOCAD (-0.3%) and SANOFI (-7%) one rank down. CELGENE (+23%), NOVO NORDISK (-19%) and OCTAPHARMA (-4%) retained their previous ranks three, eight and nine. Its only newcomer BAYER which increased its supplies under the programme by 2.6 times rounded out the top 10 ranking. The total share of the top 10 drug manufacturers within DLO Program expanded from 54.6% to 55.3%.

Table 1. The top 10 drug manufacturers for DLO

Rank		Manufacturer*	Share in total DLO volume, %	
2020	2019		2020	2019
1	2	GENERIUM ZAO RF	9.6	8.2
2	1	**TAKEDA**	8.9	10.7
3	3	**CELGENE**	7.8	6.9
4	5	**JOHNSON & JOHNSON**	6.9	6.1
5	4	BIOCAD RF	5.7	6.2
6	7	**NOVARTIS**	4.4	3.9
7	6	**SANOFI**	4.0	4.7
8	8	**NOVO NORDISK**	2.8	3.7
9	9	OCTAPHARMA	2.7	3.1
10	25	**BAYER**	2.7	1.1
Total			55.3	54.6

*AIPM members are in bold

Two newcomers broke into the ranks of the top ten brands ranking (Table 2). XARELTO (3.1-fold growth in purchases) and DARZALEX (93-fold growth) moved up to ranks four and eight. In addition, only one more brand ELIZARIA (+68%) rose in the ranks, moving up from rank seven to two. Three brands with negative growth rates ACELLBIA (-1%), ADVATE (-19%) and TOUJEO (-7%), as well as FEIBA (+0.2%) that showed nearly zero growth rates, moved down to ranks five through seven and the last one, respectively. REVLIMIDE (+23%) held and reinforced its previous rank one, whereas ELAPRASE (+4%) and COAGIL-VII (+3%) kept their previous ranks three and nine. The total share of the top ten brands increased by nearly 4 p.p. up to 28.2%.

Table 2. The top 10 Brands in DLO segment

Rank in the top ten		Brand	Share in total DLO volume, %	
2020	2019		2020	2019
1	1	REVLIMIDE	7.8	6.9
2	7	ELIZARIA	3.2	2.1
3	3	ELAPRASE	2.7	2.8
4	27	XARELTO	2.2	0.8
5	4	ACELLBIA	2.2	2.5
6	2	ADVATE	2.2	3.0
7	5	FEIBA	2.2	2.4
8	50	DARZALEX	2.0	0.0
9	9	COAGIL-VII	1.9	2.0
10	8	TOUJEO SOLOSTAR	1.8	2.1
Total			28.2	24.6

Just as the corresponding brand, LENALIDOMIDE (+23%) continued to be a leader of the top 10 INN and group names ranking (Table 3). Despite 11% reduction, RITUXIMAB held its rank two. FACTOR VIII INHIBITOR BYPASSING FRACTION (+0.2%) also held its previous rank nine. Four INNs managed to rise in the ranks. At the same time, INN ECULIZUMAB and IDURSULFASE (+4% each) moved one rank up, INTERFERON BETA-1A (+10%) moved two ranks up. RIVAROXABAN which increased purchases by 3.1 times moved up to rank seven from 33, becoming the only newcomer of the top ten ranking. Due to negative growth rates, FACTOR VIII (-8%), OCTOCOG ALFA (-19%) and INSULIN GLARGINE (-14%) moved down to ranks four, eight and ten, respectively. In total, ten INNs and group names accounted for 31.3% of the market against 32.2% in the year-earlier period.

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, %	
2020	2019		2020	2019
1	1	LENALIDOMIDE	7.8	6.9
2	2	RITUXIMAB	3.2	4.0
3	4	ECULIZUMAB	3.2	3.4
4	3	FACTOR VIII	3.0	3.5
5	6	IDURSULFASE	2.7	2.8
6	8	INTERFERON BETA-1A	2.6	2.6
7	33	RIVAROXABAN	2.2	0.8
8	5	OCTOCOG ALFA	2.2	3.0
9	9	FACTOR VIII INHIBITOR BYPASSING FRACTION	2.2	2.4
10	7	INSULIN GLARGINE	2.2	2.8
Total			31.3	32.2

The top ten ATC groups ranking did not change its leader either. L04 Immunosuppressants (+11%) and B02 Antihemorrhagics (-5%) held their own in the ranking (Table 4). The other top 10 ATC groups changed their ranks; and only three of them rose in the ranks. L01 Antineoplastic agents (+15%) and A16 Other alimentary tract and metabolism products (+18%) moved up one rank, coming in at numbers three and five, respectively. The newcomers B01 Antithrombotic agents (3.0-fold growth in purchases) broke into the top ten ranking, coming in at number seven. A10 Drugs used in diabetes (-12%) which reduced their purchases, as well as L03 Immunostimulants (+8%), J05 Antivirals for systemic use (+6%) and L02 Endocrine therapy (+0.3%) which showed relatively low growth rates lost one rank each. R03 Drugs for obstructive airway diseases (+16%) also moved one rank down despite the outstripping growth rates. The total share of the top 10 ranking decreased by almost 0.5 p.p. and accounted for 81.5%.

Table 4. The top ten ATC groups in DLO segment

Rank		ATC code	ATC group	Share in total DLO volume, %	
2020	2019			2020	2019
1	1	L04	IMMUNOSUPPRESSANTS	22.3	22.0
2	2	B02	ANTIHEMORRHAGICS	14.6	16.9
3	4	L01	ANTINEOPLASTIC AGENTS	9.4	8.9
4	3	A10	DRUGS USED IN DIABETES	8.3	10.3
5	6	A16	OTHER ALIMENTARY TRACT AND METABOLISM PRODUCTS	6.7	6.3
6	5	L03	IMMUNOSTIMULANTS	6.6	6.7
7	12	B01	ANTITHROMBOTIC AGENTS	4.4	1.6
8	7	J05	ANTIVIRALS FOR SYSTEMIC USE	3.7	3.9
9	8	R03	DRUGS FOR OBSTRUCTIVE AIRWAY DISEASES	3.1	2.9
10	9	L02	ENDOCRINE THERAPY	2.4	2.6
Total				81.5	82.0

Data on supplies to the top ten regions of Russia under State Reimbursement Program (DLO) are shown in Table 5. Moscow which increased its share in total volume up to 27.6% continued to demonstrate the largest volumes of purchases. St. Petersburg was ranked second at the end of the year with a share of 4.5%, displacing the Moscow Region one rank down from that position. It should be noted that the positive growth rates and expansion of the market share were also reported in Sverdlovsk, Krasnodar, Tyumen and Nizhny Novgorod regions, except for the first two. The total share of the top ten regions also expanded: 51,8% vs 50,6% in the year-earlier period.

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

Rank		Region	Share in total DLO volume, %	
2020	2019		2020	2019
1	1	Moscow	27.6	26.5
2	3	Saint Petersburg	4.5	4.0
3	2	Moscow Region	3.7	4.5
4	5	Sverdlovsk Region	2.8	2.7
5	6	Krasnodar Krai	2.7	2.6
6	4	Tatarstan Republic	2.3	2.8
7	7	Novosibirsk Region	2.2	2.2
8	9	Tyumen Region	2.2	2.1
9	12	Nizhny Novgorod Region	2.0	1.7
10	16	Perm Region	2.0	1.5
Total			51.8	50.6

Conclusion. In 2020, the DLO sector brought in RUB 124.080 bil. (USD 1.756 bil.) at contractual prices, which is by 9% in terms of roubles and by 0.2% in terms of dollars more than in 2018. In pack terms, the supplies under the program increased by 4% to 88.861 mil. packs. The average cost of FPP included in the DLO Programme decreased as compared to the past year (USD 19.76 vs USD 20.49).

[2] From 2008 until now, data on DLO have been provided as information about shipments in contractual prices: prices at which the government will reimburse moneys to the distributor.

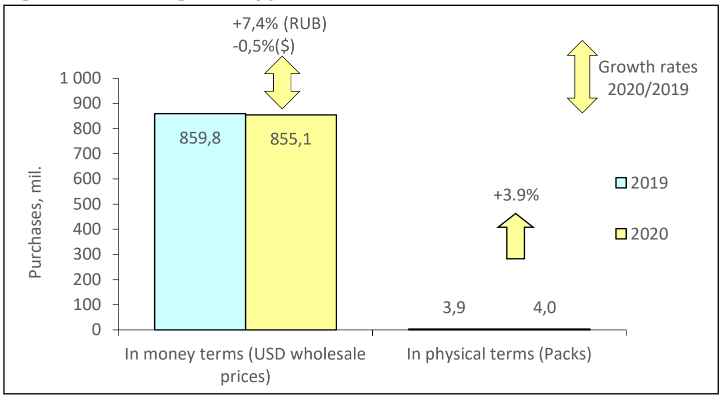
[3] Hereinafter, unless otherwise stated, growth gains are stated in the rouble equivalent or national currency.

2020 COST DEMANDING NOSOLOGIES (VZN) PROGRAM

In 2020, three more INNs were included in the high cost nosologies (VZN) drug list: Daratumumab for the treatment of chronic leukemia, Alemtuzumab for the treatment of multiple sclerosis, Everolimus for the treatment after organ or tissue transplantation. In total, the purchases of these drugs accounted for 5.4% of the total value of the program (RUB 3.2 bil.) in 2020.

In 2020, supplies under the VZN drug supply program in value terms increased by 7.4%, amounting to USD 855 bil., as compared to 2019 (RUB 59.8 bil.) compared to the same period in 2019. in terms of packs, vzn purchases increased by 3.9% (4.0 mil. packs).

Figure 1. VZN Program supplies trend in 2020 vs 2019



The groups of oncohematological drugs (+27%) and drugs to treat systemic-onset juvenile arthritis (+15%), drugs to treat hemolytic uremic syndrome (+14%), and drugs to treat mucopolysaccharidosis type I, II and VI (+14%) showed the largest increase in purchases in terms of roubles as compared to the same period of the previous year. A negative increase in the purchases was recorded in the groups of drugs to treat hemophilia (-7.6%) and cystic fibrosis (-3.7%). In 2020, the group of oncohematological drugs became the leader of the purchases rating, the haemophilia drugs and the multiple sclerosis drugs moved up to ranks two and three, respectively.

Table 1. Supplies pattern under the VZN Program

Nosologies	INN	Share in total VZN supplies (RUB), %	
		2020	2019
Oncohematology		**27.8**	**23.5**
	LENALIDOMIDE	16.1	14.1
	RITUXIMAB	6.1	7.7
	DARATUMUMAB	4.2	0.0
	BORTEZOMIB	0.8	1.2
	IMATINIB	0.4	0.4
	FLUDARABINE	0.2	0.3
Haemophilia		**27.8**	**32.3**
	FACTOR VIII	6.2	7.2
	OCTOCOG ALFA	4.6	6.2
	FACTOR VIII INHIBITOR BYPASSING FRACTION	4.5	4.8
	EPTACOG ALFA (ACTIVATED)	4.1	4.4
	FACTOR VON WILLEBRAND*FACTOR VIII	3.3	3.7
	MOROCTOCOG ALFA	2.8	3.7
	FACTOR IX	1.8	1.9
	NONACOG ALFA	0.4	0.3
Sclerosis Multiplex		**19.6**	**20.0**
	INTERFERON BETA-1A	5.4	5.2
	INTERFERON BETA-1B	4.1	4.3
	NATALIZUMAB	3.3	4.7
	TERIFLUNOMIDE	2.4	2.5
	PEGINTERFERON BETA-1A	2.0	1.7
	GLATIRAMER ACETATE	1.6	1.6
	ALEMTUZUMAB	0.9	0.0
Mucopolysaccharidosis type I, II and VI		**9.4**	**8.9**
	IDURSULFASE	5.5	5.4
	GALSULFASE	2.7	2.3
	LARONIDASE	1.1	1.1
	IDURSULFASE BETA	0.1	0.1
Hemolytic-uremic syndrome		**5.6**	**5.3**
	ECULIZUMAB	5.6	5.3
Transplantation		**3.4**	**3.5**
	TACROLIMUS	2.2	2.1
	MYCOPHENOLIC ACID	0.6	1.2
	EVEROLIMUS	0.3	0.0
	CICLOSPORIN	0.2	0.2
	MYCOPHENOLATE MOFETIL	0.1	0.1
Systemic-onset juvenile arthritis		**2.2**	**2.1**
	CANAKINUMAB	1.7	1.2
	TOCILIZUMAB	0.5	0.8
	ETANERCEPT	0.0	0.1
	ADALIMUMAB	0.0	0.0
Mucoviscidosis		**2.0**	**2.3**
	DORNASE ALFA	2.0	2.3
Gaucher disease		**1.9**	**2.0**
	IMIGLUCERASE	1.4	1.5
	VELAGLUCERASE ALFA	0.5	0.5
Pituitary dwarfism		**0.3**	**0.3**
	SOMATROPIN	0.3	0.3

Generium moved up to rank number one in the top ten manufacturers ranking in 2020 (Table 3). The purchases of drugs produced by this company increased by 26%, and the share in the supply pattern under the VZN program increased from 16% to 19%. The growth was mostly provided by increased purchases of biosimilars Elizaria (+69%) to treat atypical hemolytic-uremic syndrome and Tigeraza (5-fold growth) to treat cystic fibrosis. The drugs kept dominating positions in their INN segments and accounted for 30% and 10% in the Generium sales pattern (instead of 22% and 3% in 2019). Elizaria moved up from rank 9 to 2 in the brands ranking (Table 2). The top ten ranking also includes Coagil VII, which accounts for 21% of the company's total supplies. Takeda moved up to rank two in the manufacturers ranking. According to the results for the previous year, it gained the lead due to acquisition of Shire, a developer of many orphan drugs. The purchases of Takeda drugs slightly decreased as compared to the previous year, and the share in the VZN segment pattern decreased from 20% to 17% (Table 3). Elaprase to treat mucopolysaccharidosis type II (32%), recombinant coagulation factor VIII Advate (27%) and anti-inhibitor coagulant complex Feiba (26%) make up the main volume of sales of the company. All of them entered the top ten brands ranking and moved up to ranks three through five (Table 2). The former leader of the VZN program, Celgene, has been holding rank 3 in the top ten ranking since 2019 (Table 3). Revlimide is the only drug of the company which increased its share in the supply pattern from 14% to 16% (Table 2).

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

Rank		Brand	Share in total VZN supplies, %	
2020	2019		2020	2019
1	1	REVLIMIDE	16.1	14.1
2	9	ELIZARIA	5.6	3.5
3	3	ELAPRASE	5.5	5.4
4	2	ADVATE	4.6	6.2
5	4	FEIBA	4.5	4.8
6	75	DARZALEX	4.2	0.0
7	6	ACELLBIA	4.1	4.7
8	7	COAGIL-VII	3.9	4.0
9	5	TYSABRI	3.3	4.7
10	22	REBIF	3.1	1.6
Total			55.0	49.8

Johnson & Johnson and Biocad swapped their ranks in the ranking, moving to ranks 4 and 5, respectively (Table 3). Johnson & Johnson's sales increased by 1.5 times, which was due to the inclusion of Darzalex (Daratumumab) indicated for the treatment of multiple myeloma, in the VZN program. In 2020, this drug accounted for 44% of all the company's supplies and moved to rank 6 in the brands ranking (Table 2). The company's multiple sclerosis drugs, Tisabri and a new drug, Plegridi (Peginterferon beta-1a), accounted for 35% and 21% of the company's total sales. Tizabri remained in the top 10 ranking but moved down from rank 5 to 9. Acellbia (Rituximab), the leading drug of Biocad, provided 45% of its supplies and moved down to rank 7 in the brands ranking (Table 2). In 2020, the Merck position in the ranking improved (rank 7), which was caused by increase in purchases of Rebif that broke into the top 10 brands ranking. Roche and Dr Reddys dropped out of the top 10 ranking. In the former case, it happened due to the fact that Pulmozyme, the drug to treat cystic fibrosis, has lost its patent protection.

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

Rank in the top ten		Manufacturer*	Share in total VZN supplies, %	
2020	2019		2020	2019
1	2	GENERIUM ZAO RF	18.8	16.0
2	1	**TAKEDA**	17.2	20.1
3	3	CELGENE	16.1	14.1
4	5	**JOHNSON & JOHNSON**	9.6	6.5
5	4	BIOCAD RF	9.0	9.8
6	6	OCTAPHARMA	5.4	6.1
7	16	**MERCK**	3.1	1.6
8	8	**CSL BEHRING GMBH**	2.8	2.7
9	10	**BIOMARIN IRELAND**	2.7	2.3
10	11	**SANOFI-AVENTIS**	2.2	2.1
			86.9	75.3

*AIPM members are in bold

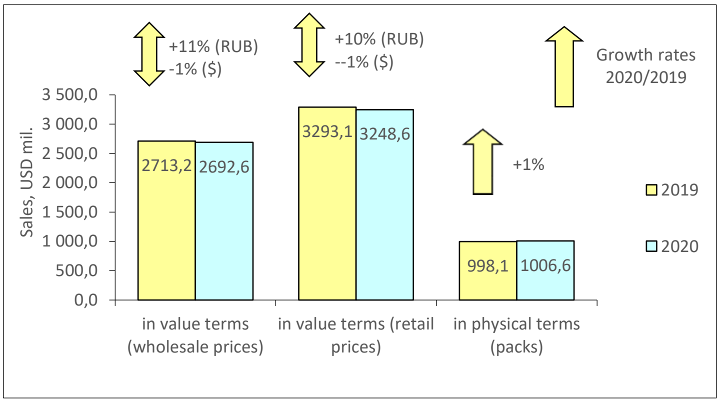
Conclusion: In 2020, purchases under the VZN program increased as compared to 2019. This is partly due to the drugs added to the VZN program for the first time (3 INNs), however, purchases of the most “traditional” drugs also increased. In total, purchases of Russian-manufactured drugs in physical terms increased by 14.3% in the VZN segment, while those of foreign manufacture decreased by 2.9%. In case of Russian drugs, the growth rates of purchases in value terms were also higher (+10.3% and + 6.1%, respectively).

CFD PHARMACY MARKET (WITHOUT MOSCOW): 2020 RESULTS

According to Federal State Statistics Service, as of January 1, 2020 estimated population of the Central Federal District (CFD) (without Moscow) was 26.755 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 2020, the average wage in the CFD (with Moscow) was RUB 65,188 (USD 904.13), which was 28% higher than the average wage in Russia (RUB 51,083).

According to the results of the Retail Audit of Finished Pharma Products (FPP) in Russian Federation™, at the end of 2020, the volume of drugs in physical terms in the CFD (excl. of Moscow) showed low positive growth rates (+1%) and totalled to 1.007 mil. packs. In money terms, the market saw a 11% increase in terms of roubles and 1% decrease in terms of dollars. At the same time, the market volume reached RUB 194.213 bil. (USD 2.693 bil.) at wholesale prices (Fig.1). The region market share accounted for 20.4% of the Russian pharmacy retail sales. The average cost of a pack decreased as compared to the same period of 2019: USD 3.23 vs. USD 3.30 in retail prices. At the end of 2020, the average amount spent by the residents of the region for FPPs in the pharmacies amounted to USD 121.42.

Figure 1. CFD (exc. of Moscow) pharmacy market in 2019 – 2020



At the end of 2020, BAYER (+8%) held rank number one in the top manufacturers ranking in the pharmacy market of the Central Federal District (exclusive of Moscow), despite lagging growth and a slight decrease of the market share (Table
one). 1). The Russian OTCPHARM (+ 52%), which, on the contrary, showed the highest growth rates among the leaders was ranked the second, moving up from rank eight. The markets of the other two drug manufacturers developed at a fast pace. Those were SANDOZ (+21%) that moved one rank up and the only newcomer of the top ten ranking ABBOTT (+13%). At the same time, the less dynamic SANOFI (+8%), STADA (+4%), TEVA (+2%) and BERLIN-CHEMIE / MENARINI (+1%) moved down to ranks three, four, seven and nine, respectively. Manufacturers SERVIER and KRKA (+5% each) held their previous ranks five and six. The total share of the top ten did not virtually change and accounted for 35.3% vs 35,2% in a year-earlier period.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
2020	2019		2020	2019
1	1	**BAYER**	4.6	4.7
2	8	OTCPHARM	4.3	3.1
3	2	**SANOFI**	4.0	4.1
4	3	**STADA**	3.8	4.1
5	5	**SERVIER**	3.4	3.6
6	6	**KRKA**	3.4	3.5
7	4	**TEVA**	3.3	3.6
8	9	**SANDOZ**	3.0	2.8
9	7	**BERLIN-CHEMIE/MENARINI**	2.9	3.2
10	12	**ABBOTT**	2.6	2.5
Total			35.3	35.2

*AIPM members are in bold

The leader of the top ten brands did not change either: XARELTO (+15%) that showed outstripping growth rates held and reinforced its rank number one (Table 2). Even more dynamic newcomers INGAVIRIN (2.5-fold growth in sales), ARBIDOL (5.6-fold growth) and ELIQUIS (+ 68%) broke into the top ten ranking, coming in at ranks two through four, respectively. They displaced brands MEXIDOL (+5%), CONCOR (+3%), DETRALEX (+2%) and NUROFEN (+1%) three ranks down, to numbers five through eight, respectively. PENTALGIN (+16%), which moved one rank down, and MIRAMISTIN (+24%), which held its previous rank ten, rounded out the top-ten ranking. The total share of the top ten brands ranking increased by 1.7 p.p. and achieved 8.3%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
2020	2019		2020	2019
1	1	XARELTO	1.3	1.2
2	17	INGAVIRIN	1.1	0.5
3	46	ARBIDOL	1.1	0.2
4	14	ELIQUIS	0.8	0.5
5	2	MEXIDOL	0.7	0.8
6	3	CONCOR	0.7	0.8
7	4	DETRALEX	0.7	0.8
8	5	NUROFEN	0.7	0.7
9	8	PENTALGIN	0.6	0.6
10	10	MIRAMISTIN	0.6	0.5
Total			8.3	6.7

Only the leaders XYLOMETAZOLINE (-1%) and RIVAROXABAN (+15%) held their own in the top ten INNs and grouping names ranking (Table 3). Some shifts took place in the lower part of the top ten ranking, as a result of which most INNs fell in the ranks. BISOPROLOL (+5%), NIMESULIDE (+6%) and DICLOFENAC (+12%) lost one point each, while the composition DIOSMIN*HESPERIDIN (+5%) and INN PANCREATIN (+2%) moved two ranks down and IBUPROFEN (+2%) three ranks down. Only the newcomers UMIFENOVIR (5-fold growth in sales), which broke into the top ten ranking for the first time, and IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID (2.5-fold growth) increased their ranks, moving up to ranks three and five. The total share of the top 10 increased from 10.0% to 11.1%.

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

Rank		INNs/Grouping Names	Share in total pharmacy sales, %	
2020	2019		2020	2019
1	1	XYLOMETAZOLINE	1.6	1.7
2	2	RIVAROXABAN	1.3	1.2
3	49	UMIFENOVIR	1.1	0.2
4	3	BISOPROLOL	1.1	1.2
5	31	IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID	1.1	0.5
6	4	DIOSMIN*HESPERIDIN	1.1	1.1
7	6	NIMESULIDE	1.0	1.1
8	5	IBUPROFEN	1.0	1.1
9	7	PANCREATIN	0.9	1.0
10	9	DICLOFENAC	0.8	0.8
Total			11.1	10.0

C09 Agents acting on the rennin-angiotensin system (+13%) and M01 Anti-inflammatory and antirheumatic products (+5%) continued to show the largest sales on the regional market among the top ATC groups (Table 4). At the end of the year, J05 Antivirals for systemic use, which doubled their sales and moved up to that rank from thirteen, were ranked third. It should be noted that in addition, only another one INN managed to rise in the ranks. R05 Cough and cold preparations (+12%) moved up to rank nine from ten. In contrast, B01 Antithrombotic agents (+19%), R01 Nasal preparations (-1%), G03 Sex hormones (+3%) and C05 Vasoprotectives (+4%) moved down to the lower ranks. The groups J01 Antibacterials for systemic use (+35%) and N02 Analgesics (+14%) held their previous ranks five and seven, respectively. In total, the top ten ATC groups accumulated 39.6% of the regional market, whereas in the year-earlier period they accounted for 37.2%.

Table 4. The top ten ATC Groups by pharmacy sales

Rank		ATC code	ATC group	Share in total pharmacy sales, %	
2020	2019			2020	2019
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.9	5.8
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.9	5.2
3	13	J05	ANTIVIRALS FOR SYSTEMIC USE	4.7	2.6
4	3	B01	ANTITHROMBOTIC AGENTS	4.3	4.0
5	5	J01	ANTIBACTERIALS FOR SYST USE	4.1	3.4
6	4	R01	NASAL PREPARATIONS	3.4	3.9
7	7	N02	ANALGESICS	3.4	3.3
8	6	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.1	3.3
9	10	R05	COUGH AND COLD PREPARATIONS	2.9	2.8
10	8	C05	VASOPROTECTIVES	2.8	3.0
Total				39.6	37.2

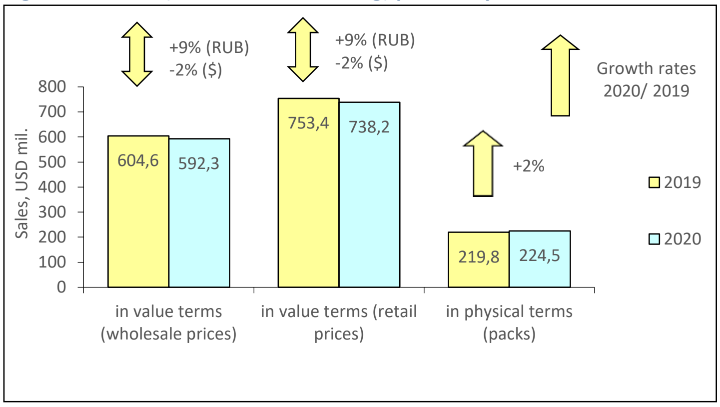
Conclusion. The retail pharmacy market of CFD (exc. of Moscow) brought in RUB 234.308 bil. on the basis of the results for 2020 (USD 3.249 bil.), which was 10% more in terms of roubles and 1% less in terms of dollars than in the same period of 2019. In pack terms, the market showed positive growth rates (+1%) and achieved 1.007 mil. packs. In 2020, the average cost of an FPP pack in the region pharmacies was USD 3.23, which was lower than the last year figure (USD 3.30), 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 121.42 vs. USD 108.28).

NWFD (EXCLUS. OF SAINT PETERSBURG) PHARMACY MARKET: 2020 RESULTS

According to Federal State Statistics Service, as of January 1, 2020 estimated population of the North-Western Federal District (NWFD) (exc. of St. Petersburg) was 8.583 mil., which accounted for 5.8% of the total Russian Federation population. According to Federal State Statistics Service's data, the average wage in the NWFD (exc. of St. Petersburg) was RUB 56,827 (USD 788.17), which was 11% higher than the average wage in Russia (RUB 51083).

According to the results of the Retail Audit of Finished Pharma Products (FPP) in the Russian Federation™, at the end of 2020 the sales of FPPs in physical terms in pharmacies of NWFD (without St. Petersburg) saw a 2% increase to 224.462 mil. packs. In money terms, the market saw a 9% increase in terms of roubles and 2% decrease in terms of dollars. At the same time, the volume of the market achieved RUB 42.703 bil. (USD 592.273 mil.) at wholesale prices (Fig. 1). The share of the region accounted for 4.6% of the Russian retail pharmacy sales. The average cost of an OTC pack in the pharmacies reduced: USD 3.29 vs. USD 3.43 at retail prices in the year-earlier period. In total, an average amount spent by the region residents for FPPs in the pharmacies in 2020 amounted to USD 86.00.

Figure 1. NWFD (exc. of St. Petersburg) pharmacy market in 2019 – 2020



The top ten manufacturers ranking in the NWFD (exc. of St Petersburg) pharmacy market did not change in composition at the end of 2020 (Table 1). However, only two of the top ten INNs held their own in the ranking. SANDOZ (+10%) and BERLIN-CHEMIE/MENARINI (+8%) as before rounded out the top ten ranking. The Russian OTCPHARM (+49%) became the leader of the top ten, displacing BAYER (+7%) one rank down from this position. In addition, another two manufacturers of the top ten ranking managed to rise in the ranks. KRKA (+11%) moved up to rank three from five, and TEVA (+3%) moved up to rank seven from eight. At the same time, the less dynamic SERVIER (+3%), SANOFI and STADA (+1% each), as well as GEDEON RICHTER, which reduced its sales by 3%, moved down to the lower ranks, from four through six and eighth, respectively. The total share of the top 10 drug manufacturers slightly reduced, accounting for 38.0% vs 38.2%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
2020	2019		2020	2019
1	6	OTCPHARM	5.0	3.7
2	1	**BAYER**	4.8	4.9
3	5	**KRKA**	4.0	3.9
4	3	**SERVIER**	4.0	4.2
5	2	**SANOFI**	3.9	4.3
6	4	**STADA**	3.8	4.1
7	8	**TEVA**	3.4	3.6
8	7	GEDEON RICHTER	3.2	3.6
9	9	**SANDOZ**	3.1	3.1
10	10	**BERLIN-CHEMIE/MENARINI**	2.7	2.7
Total			38.0	38.2

*AIPM members are in bold

Two newcomers broke into the ranks of the top ten brands (Table 2). ARBIDOL showed a fivefold increase in sales and soared to rank number one of the top ten from the fifth ten, and INGAVIRIN, which increased sales by 2.2 times, moved up to rank two. In addition to them, another three brands showed high growth rates. ELIQUIS (+29%) moved up to rank four, and LORISTA (+17%) and PENTALGIN (+16%) held their previous ranks seven and ten. The other brand names of the top ten fell in the ranks: the less dynamic XARELTO (+4%), NUROFEN (+9%), CONCOR (+5%) and CARDIOMAGNYL (+1%) moved down to ranks three, five, six and nine, and DETRALEX that reduced its sales by 4% moved down to rank eight. The total share of the top ten brands ranking increased by 1.7 p.p. and achieved 8.8%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
2020	2019		2020	2019
1	44	ARBIDOL	1.4	0.3
2	12	INGAVIRIN	1.1	0.6
3	1	XARELTO	1.1	1.1
4	5	ELIQUIS	0.9	0.7
5	2	NUROFEN	0.9	0.9
6	3	CONCOR	0.8	0.8
7	7	LORISTA	0.8	0.7
8	4	DETRALEX	0.7	0.8
9	8	CARDIOMAGNYL	0.6	0.7
10	10	PENTALGIN	0.6	0.6
Total			8.8	7.1

UMIFENOVIR (5-fold increase in sales), 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 newcomer, IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID (2.2-fold growth) moved up to rank five. Almost all remaining INNs fell in the ranks despite the outperforming growth rates of some of them. Thus, XYLOMETAZOLINE (+1%), IBUPROFEN and BISOPROLOL (+11% each), as well as NIMESULIDE (+18%) moved down one rank, coming in at ranks two through four and eighth, respectively. INN RIVAROXABAN (+4%) and the composition DIOSMIN*HESPERIDIN (+5%) lost two ranks each, while ATORVASTATIN (+8%) moved down from rank six to ten. In total, ten INNs and group names accounted for 11.6% against 9.9% in the year-earlier period.

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

Rank		INNs/Grouping Names	Share in total pharmacy sales, %	
2020	2019		2020	2019
1	49	UMIFENOVIR	1.4	0.3
2	1	XYLOMETAZOLINE	1.4	1.5
3	2	IBUPROFEN	1.3	1.3
4	3	BISOPROLOL	1.2	1.2
5	27	IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID	1.1	0.6
6	4	RIVAROXABAN	1.1	1.1
7	5	DIOSMIN*HESPERIDIN	1.1	1.1
8	7	NIMESULIDE	1.0	1.0
9	9	LOSARTAN	1.0	0.9
10	6	ATORVASTATIN	1.0	1.0
Total			11.6	9.9

The top ten ATC group ranking showed high stability. Most of the top ten ATC groups held their own in the ranking. Among them were the leaders of the top ten C09 Agents acting on the rennin-angiotensin system (+17%) and M01 Anti-inflammatory and antirheumatic products (+10%). The groups B01 Antithrombotic agents (+7%), J01 Antibacterials for systemic use (+15%), N02 Analgesics (+14%) and C05 Vasoprotectives (+7%), which continued to hold ranks four, six, seven and the last rank, held their own in the ranking. Only the group J05 Antivirals for systemic use (+85%), which moved up from rank nine to three, managed to rise in the ranks. In contrast, three ATC groups from the top 10 moved down to the lower ranks: G03 Sex hormones (+4%), R01 Nasal preparations (0%) and R05 Cough and cold preparations (+7%). The top ten ATC groups accounted for 40.9% of the regional pharmacy sales, 38.7% in the year-earlier period.

Table 4. The top ten ATC Groups by pharmacy sales

Rank		ATC code	ATC group	Share in total pharmacy sales, %	
2020	2019			2020	2019
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	6.7	6.2
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.3	5.2
3	9	J05	ANTIVIRALS FOR SYSTEMIC USE	5.0	3.0
4	4	B01	ANTITHROMBOTIC AGENTS	3.9	3.9
5	3	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.9	4.0
6	6	J01	ANTIBACTERIALS FOR SYST USE	3.5	3.3
7	7	N02	ANALGESICS	3.4	3.3
8	5	R01	NASAL PREPARATIONS	3.3	3.6
9	8	R05	COUGH AND COLD PREPARATIONS	3.1	3.2
10	10	C05	VASOPROTECTIVES	2.9	2.9
Total				40.9	38.7

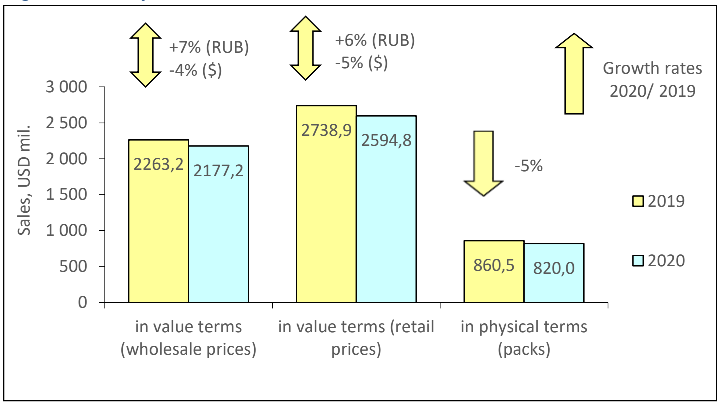
Conclusion. In 2020, the pharmacy market of the NWFD (exc. of St Petersburg) brought in RUB 53.228 bil. (USD 738.238 mil.), which was by 9% in terms of roubles and 2% in terms of dollars less than in 2019. In pack terms, the market extended by 2% and amounted to 224.462 mil. packs. The average cost of an FPP pack in the regional pharmacies was USD 3.29 according to the results for 2020, which was virtually the same as compared to the 2019 figure (USE 3.43), but lower than the national average across the country (USD 3.39). The FPP expenses of the district residents were lower than the national average expenses throughout Russia (USD 86.00 vs USD 108.28).

VFD PHARMACY MARKET: 2020 RESULTS

According to the Federal State Statistics Service, as of January 1, 2020 estimated population of the Volga Federal District (VFD. 29.288 mil., which accounted for 20.0% of the total Russian Federation population. According to Federal State Statistics Service's data, in 2020 the average wage in the VFD was RUB 36,811 (USD 510.55), which was 28% lower than the national average wage in Russia (RUB 51083).

According to the results of the Retail Audit of OTC drugs in Russian Federation™, in 2020 the pharmacy market of VFD in pack terms reduced by 5% to 819.984 mil. packs as compared to the previous year (Fig. 1) In wholesale prices the market increased by 7% in terms of roubles, but reduced by 4% in terms of dollars, reaching RUB 157.049 bil. (USD 2.177 bil.), A region's share in the total pharmacy sales in Russia accounted for 16.3%. The = average cost of FPP in the VFD pharmacies increased as compared with the year-earlier period (USD 3.18) and was equal to USD 3.16 based on the results for 2020. The average per capita expenses for purchase of drugs in the pharmacies were estimated at USD 88.60.

Figure 1. VFD pharmaceutical market in 2019– 2020



Four from the top ten manufacturers held their own in the ranking in the retail market of the Volga Federal District based on the results of 2020 (Table 1). Thus, STADA (-4%), KRKA and TEVA (-3% each) kept their previous ranks from four through six, while ABBOTT (+9%) held its rank nine. Due to 32% increase in sales, the Russian OTCPHARM topped the ranking, moving to rank number one from three. Manufacturers SANDOZ (+13%) and BERLIN-CHEMIE / MENARINI (+2%) also moved up to the higher ranks seven and ten. On top of that, the latter became the only newcomer of the top 10 ranking. On the contrary, three manufacturers lost one rank each. The former leader BAYER (+5%), as well as SANOFI and SERVIER, which reduced their sales by 3%, moved down to ranks two, three and eight, respectively. The total share of the top 10 brands reduced from 33.1% to 32.3%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
2020	2019		2020	2019
1	3	OTCPHARM	4.6	3.8
2	1	**BAYER**	3.9	4.0
3	2	**SANOFI**	3.6	3.9
4	4	**STADA**	3.4	3.8
5	5	**KRKA**	3.1	3.4
6	6	**TEVA**	3.0	3.3
7	8	**SANDOZ**	3.0	2.8
8	7	**SERVIER**	2.7	3.0
9	9	**ABBOTT**	2.7	2.6
10	11	**BERLIN-CHEMIE/MENARINI**	2.4	2.5
Total			32.3	33.1

*AIPM members are in bold

The newcomers ARBIDOL and INGAVIRIN, which sales increased 5.2 and 2.9 times respectively, became the leaders of the top ten brands ranking (Table 2). Another newcomer ELIQUIS (+93%) that broke into the top ten brand ranking moved up to rank five. Almost all the other brand names of the top ten fell in the ranks. XARELTO (+40%) and MEXIDOL (+1%), which used to hold the first two ranks, moved down to ranks three and four. PANCREATIN (+11%), ACTOVEGIN (-13%), NUROFEN (+6%) and CARDIOMAGNYL (+3%) moved down to ranks six through eight and ten, respectively. And only DETRALEX (+4%) held its previous rank nine. The total share of the top ten INN and group names ranking increased by 2 p.p. to 7.5%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
2020	2019		2020	2019
1	42	ARBIDOL	1.2	0.2
2	13	INGAVIRIN	1.2	0.4
3	1	XARELTO	1.0	0.7
4	2	MEXIDOL	0.7	0.7
5	23	ELIQUIS	0.7	0.4
6	4	PENTALGIN	0.6	0.6
7	3	ACTOVEGIN	0.6	0.7
8	5	NUROFEN	0.6	0.6
9	9	DETRALEX	0.5	0.5
10	8	CARDIOMAGNYL	0.5	0.5
Total			7.5	5.5

Just as the corresponding brands, the newcomers UMIFENOVIR (4.5-fold growth in sales) and IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID (2.9-fold growth) broke into the top ten INNs and grouping names ranking, moving up to the first ranks (Table 3). The third newcomer AZITHROMYCIN (2.4-fold growth) moved up to rank eight. Only one other INN from the top 10 ranking managed to rise in the ranks: RIVAROXABAN (+40%) moved up to rank six from ten. In contrast, the remaining six of the top 10 INNs moved down to the lower ranks. At the same time, XYLOMETAZOLINE (-2%), PANCREATIN (+3%) and BISOPROLOL (-0.5%) moved up to ranks three through five, IBUPROFEN (+8%) moved down to rank seven from five, and DIOSMIN*HESPERIDIN (+3%) and ETHYLMETHYLHYDROXYPYRIDINE (+1%) moved down to the last two ranks. In total, the top ten INNs and group names accounted for 10.4% of the regional market vs 8.0% in the year-earlier period.

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

Rank		INNs/Grouping Names	Share in total pharmacy sales, %	
2020	2019		2020	2019
1	42	UMIFENOVIR	1.5	0.4
2	33	IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID	1.2	0.4
3	1	XYLOMETAZOLINE	1.2	1.3
4	3	PANCREATIN	1.0	1.0
5	2	BISOPROLOL	1.0	1.0
6	10	RIVAROXABAN	1.0	0.7
7	5	IBUPROFEN	1.0	0.9
8	39	AZITHROMYCIN	0.9	0.4
9	4	DIOSMIN*HESPERIDIN	0.9	0.9
10	6	ETHYLMETHYLHYDROXYPYRIDINE	0.8	0.9
Total			10.4	8.0

The top ten ATC - groups ranking changed its leader as well. J05 Antivirals for systemic use (+76%) moved up to rank one from 11 (2.1-fold growth in sales) (Table 4). They displaced the leaders of the top ten ranking C09 Agents acting on the rennin-angiotensin system (+5%) and M01 Anti-inflammatory and antirheumatic products (+1%) one rank down. The second newcomer L03 Immunostimulants (+35%) rounded out the top ten ranking. The other four brands from the top ten brands ranking developed their markets at a fast pace: At the same time, the groups N02 Analgesics (+11%) and R05 Cough and cold preparations (+8%) managed to rise in the ranks, while the more dynamic J01 Antibacterials for systemic use (+42%) and B01 Antithrombotic agents (+23%) held and strengthened their ranks four and five. G03 Sex hormones (-4%) and R01 Nasal preparations (-2%), which reduced their sales, moved down to ranks six and nine, respectively. In total, the top ten ATC groups accumulated 39.6% of sales, whereas in the year earlier period they accounted for 35.5%.

Table 4. The top ten ATC Groups by pharmacy sales

Rank		ATC code	ATC group	Share in total pharmacy sales, %	
2020	2019			2020	2019
1	11	J05	ANTIVIRALS FOR SYSTEMIC USE	5.6	2.9
2	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.4	5.5
3	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.9	5.2
4	4	J01	ANTIBACTERIALS FOR SYST USE	4.9	3.7
5	5	B01	ANTITHROMBOTIC AGENTS	3.9	3.4
6	3	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.3	3.7
7	10	N02	ANALGESICS	3.1	2.9
8	9	R05	COUGH AND COLD PREPARATIONS	3.0	3.0
9	6	R01	NASAL PREPARATIONS	2.9	3.1
10	19	L03	IMMUNOSTIMULANTS	2.7	2.2
Total				39.6	35.5

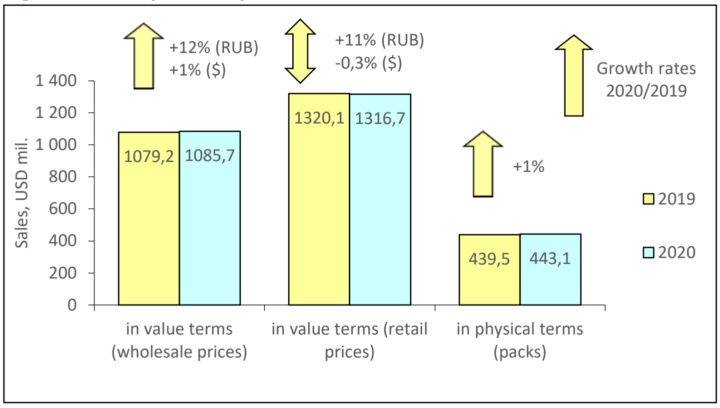
Conclusion. Based on the results for 2020, the pharmacy market in the VFD was estimated at RUB 187.233 bil. (USD 2.595 bil.) at retail prices. At the same time, the market behaviour was positive in rouble terms (+6%) and negative in dollar (-5%) terms. In physical terms, the sales reduced by 5% to 819.984 mil. packs. The average cost of an OTC pack based on the results for 2020 was USD 3.16, which was lower compared to the same period a year ago (USD 3.12), and lower than the national average across Russia (USD 3.39). Per capita expenses of the district residents for purchase of medicines in the pharmacies were also lower than the national average figures (USD 88.60 vs. USD 108.28).

SOUTHERN FEDERAL DISTRICT PHARMACY MARKET: 2020 RESULTS

According to the Federal State Statistics Service, as of January 1, 2020 estimated population of the Southern Federal District (SouFD) was 16.466 mil., which accounted for 11.2% of the total Russian Federation population. According to Federal State Statistics Service's data, in 2020 the average wage in the Southern FD was RUB 36166 (USD 501.61), which was 29% lower than the national average wage in Russia (RUB 51083).

According to the results of the Retail Audit of FPP (Finished Pharmaceutical Products) in Russian Federation™, the sales of drugs in physical terms in the Southern Federal District saw a 1% increase to 443.110 mil. packs at the end of 2020. In value terms, the market showed positive growth rates both in roubles equivalent (+12%), and in dollar equivalent (+1%), and reached RUB 78.421 bil. (USD 1.086 bil.) at wholesale prices (Fig. 1). The city market share accounted for 8.3% of the pharmacy sales in Russia. At year-end 2020, the average cost of a finished pharma product (FPP) pack was USD 2.97 at retail prices vs. USD 3.00 in 2019. For 2020 as a whole, the average amount spent by residents of the SoFD for drugs amounted to USD 79.97.

Figure 1. SoFD pharmacy market in 2019 – 2020



At the end of 2020, the top ten manufacturers on the pharmacy market of the Southern Federal District (SoFD) did not change in composition (Table 1). The top ten ranking did not change its leader either. As before, BAYER (+14%) holds its previous rank number one. The Russian OTCPHARM (+46%), which showed the highest growth rates among the leaders and moved up to rank one from six, was ranked second based on the results of the year. SANDOZ (+15%) and ABBOTT (+9%) also rose in the ranks, moving up to ranks five and eight, respectively. At the same time, the less dynamic TEVA (+4%), as well as STADA (-3%), SERVIER (-0.1%), BERLIN-CHEMIE / MENARINI (-0.3%), which reduced their sales, on the contrary, moved down to ranks four, six, seven and nine, respectively. SANOFI (+2%) and GLAXOSMITHKLINE (-0.2%) kept their previous ranks three and ten. In total, the top ten manufacturers accounted for 32.3% of the market, whereas in the year-earlier period – 33.5%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
2020	2019		2020	2019
1	1	**BAYER**	4.6	4.6
2	6	OTCPHARM	4.0	3.1
3	3	**SANOFI**	3.5	3.9
4	2	**STADA**	3.4	3.9
5	8	**SANDOZ**	3.1	3.0
6	5	**TEVA**	3.0	3.2
7	4	**SERVIER**	2.9	3.3
8	9	**ABBOTT**	2.8	2.9
9	7	**BERLIN-CHEMIE/MENARINI**	2.7	3.0
10	10	**GLAXOSMITHKLINE**	2.3	2.6
Total			32.3	33.5

*AIPM members are in bold

Three newcomers broke into the ranks of the top ten brands ranking (Table 2). ARBIDOL (4.4-fold growth in sales), ELIQUIS (2.5-fold growth) and HEPTRAL (+40%) moved up to ranks three, four and nine. The top ten ranking changed its leader: INGAVIRIN, which sales increased 2.5 times, moved up to rank one from six. At the same time, it displaced XARELTO (+65%) one rank down despite the high growth rates it showed. The sales growth rates of NUROFEN (+5%) and DETRALEX (+4%) lagged behind the market average, while ACTOVEGIN (-13%) and MEXIDOL (-2%) brands reduced their sales, which resulted in a rating downgrade of all of these four brands – they moved down to ranks five through eight, respectively. PENTALGIN (+13%) also moved one rank down, coming in at number ten, despite the outperforming growth rates. The total share of the top ten brands increased by more than 2 p.p. to 8%

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
2020	2019		2020	2019
1	6	INGAVIRIN	1.3	0.6
2	1	XARELTO	1.2	0.8
3	43	ARBIDOL	1.1	0.3
4	22	ELIQUIS	0.9	0.4
5	2	NUROFEN	0.7	0.8
6	5	DETRALEX	0.6	0.6
7	3	ACTOVEGIN	0.6	0.7
8	4	MEXIDOL	0.6	0.6
9	18	HEPTRAL	0.5	0.4
10	9	PENTALGIN	0.5	0.5
Total			8.0	5.8

Despite a slight decrease in sales and reduction of its market share, XYLOMETAZOLINE (-0.4%) held its previous rank one in the top ten INN and group names ranking (Table 3). The newcomers IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID (2.5-fold growth in sales) and UMIFENOVIR (3.9-fold growth) broke into the top ten ranking, coming in at numbers two and three. Another two newcomers AZITHROMYCIN (2.4-fold growth) and APIXABAN (2.5-fold growth) moved up to ranks eight and ten. RIVAROXABAN (+65%) showed high growth rates, which allowed it to move up from rank eight to four. INNs PANCREATIN (+8%), IBUPROFEN (+6%) and NIMESULIDE (+1%), as well as the composition DIOSMIN*HESPERIDIN (+4%) showed growth rates below the market average, which resulted in a loss of ranks – these INNs moved down to ranks five through seven and nine, respectively. The total share of the top ten INNs accounted for 11.0% vs 8.5% in 2019.

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

Rank		INNs/Grouping Names	Share in total pharmacy sales, %	
2020	2019		2020	2019
1	1	XYLOMETAZOLINE	1.5	1.7
2	14	IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID	1.3	0.6
3	42	UMIFENOVIR	1.2	0.3
4	8	RIVAROXABAN	1.2	0.8
5	2	PANCREATIN	1.1	1.1
6	4	IBUPROFEN	1.0	1.1
7	3	NIMESULIDE	1.0	1.1
8	36	AZITHROMYCIN	0.9	0.4
9	5	DIOSMIN*HESPERIDIN	0.9	1.0
10	39	APIXABAN	0.9	0.4
Total			11.0	8.5

J05 Antivirals for systemic use (2.2-fold growth in sales) and J01 Antibacterials for systemic use (+59%) became the bestselling groups in the regional market (Table 4). The groups B01 Antithrombotic agents (+45%), N02 Analgesics (+16%) and L03 Immunostimulants (+41%) also demonstrated outstripping sales growth rates, moving up to ranks four, six and nine, respectively. At the same time, the latter became the only newcomer of the rating. M01 Anti-inflammatory and antirheumatic drugs (+3%), C09 Drugs acting on the renin-angiotensin system (+10%), which showed lower growth rates, as well as R01 Nasal preparations (-2%) and G03 Sex hormones (-0,3%) moved down to ranks three, five, seven and eight, respectively. R05 Cough and cold preparations (+8%), which held its previous rank, rounded out the top ten ATC groups ranking. The total share of the top ten increased from 35.7% to 40.3%.

Table 4. The top ten ATC Groups by pharmacy sales

Rank		ATC code	ATC group	Share in total pharmacy sales, %	
2020	2019			2020	2019
1	8	J05	ANTIVIRALS FOR SYSTEMIC USE	6.1	3.1
2	4	J01	ANTIBACTERIALS FOR SYST USE	5.2	3.6
3	1	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.8	5.2
4	6	B01	ANTITHROMBOTIC AGENTS	4.5	3.5
5	2	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	4.4	4.5
6	7	N02	ANALGESICS	3.3	3.2
7	3	R01	NASAL PREPARATIONS	3.3	3.8
8	5	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.2	3.6
9	15	L03	IMMUNOSTIMULANTS	2.9	2.3
10	10	R05	COUGH AND COLD PREPARATIONS	2.7	2.8
Total				40.3	35.7

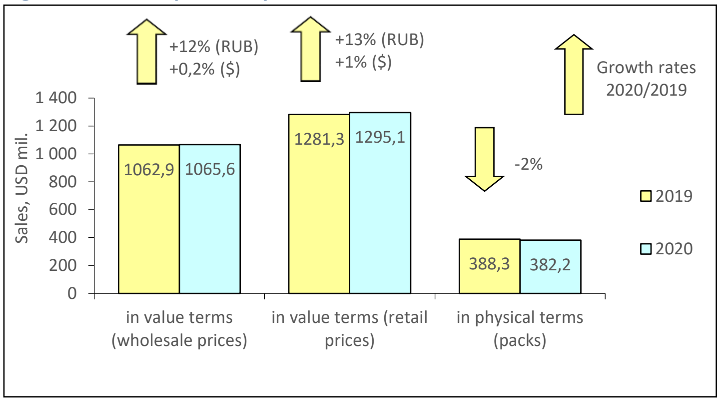
Conclusion. On the basis of the results for 2020, the retail pharmacy market of the SoFD brought in RUB 95.119 bil. (USD 1.317 bil.) at retail prices. At the same time, the sales increased 11% in terms of roubles and 0.3% in terms of dollars. In pack terms, the market expanded by 1% and reached 443.110 mil. packs. The average cost of an FPP pack in the pharmacies of the region amounted to USD 2.97, which was slightly less than in the previous year (USD 3.00), but lower than the national average (USD 3.39). In 2020, the average expenses of the SoFD residents for FPPs in the pharmacies were also lower than the national average (USD 79.97 vs. USD 108.28).

UFD PHARMACY MARKET: 2020 RESULTS

According to Federal State Statistics Service, as of January 1, 2020 estimated population of the Ural Federal District (UFD) was 12.361 mil., which accounted for 8.4% of the total Russian Federation population. According to Federal State Statistics Service's data, in 2020 the average wage in the Ural FD FD was RUB 54,155 (USD 751.11), which was 7% higher than the average wage in Russia (RUB 51083).

According to the results of the Retail Audit of Over-the-Counter Drugs (OTC) in Russian Federationтм, in 2020 the sales of OTC drugs in physical terms in pharmacies of UFD saw a 2% decrease to 382.248 mil. packs. In money terms, the OTC drugs market showed positive growth rates (+12%) in rouble terms, and nearly zero (+0.2%) in dollar terms and reached RUB 76.880 bil. (USD 1.066 mil.) at wholesale prices (Fig. 1). The regional retail sales share accounted for 8.2% of all pharmacy sales in Russia. The average retail cost of an FPP pack in 2020 was USD 3.39 against USD 3.30 in the year-earlier period. In the analysed period, the average amount spent by residents of the UFD for drugs amounted to USD 105.40.

Figure 1. Ural FD pharmacy market in 2019 – 2020



The Russian OTCPHARM (+36%) moved to rank one in the top ten manufacturers ranking in the retail market of the Ural Federal District, displacing BAYER (+13%) to rank two at the end of 2020 (Table 1). In addition to the leader, another four manufacturers, SANDOZ (+17%), SERVIER (+8%), ABBOTT (+12%) and KRKA (+8%), moved one rank up, coming in at ranks six through nine, respectively. At the same time, STADA (+1%) which showed low growth rates and GEDEON RICHTER (-3%) which reduced its sales, on the contrary, moved down to ranks four and ten. SANOFI (+3%) and TEVA (+6%) continued to hold ranks three and five. The total share of the top 10 drug manufacturers reduced by 0.5 p.p. to 33.6%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
2020	2019		2020	2019
1	4	OTCPHARM	4.4	3.6
2	1	**BAYER**	4.3	4.3
3	3	**SANOFI**	3.8	4.1
4	2	**STADA**	3.7	4.1
5	5	**TEVA**	3.2	3.4
6	7	**SANDOZ**	3.1	3.0
7	8	**SERVIER**	2.9	3.0
8	9	**ABBOTT**	2.8	2.8
9	10	**KRKA**	2.7	2.8
10	6	GEDEON RICHTER	2.7	3.0
Total			33.6	34.1

*AIPM members are in bold

The top ten INN and generic names ranking also changed its leader: Due to 2.1-fold growth in sales, INGAVIRIN moved up to rank one from four (Table 2). The more dynamic ARBIDOL, which showed almost four-fold growth in sales and broke into the top ten brands ranking for the first time, moved up to rank two. Another two newcomers, ELIQUIS (+56%) and HEPTRAL (+40%), moved up to ranks six and nine, respectively. The brands with strong sales growth also included XARELTO (+39%), PENTALGIN and ESSENTIALE (+21% each). However, the first of them lost two rating points, being displaced by more dynamic brands, while the latter two held their previous ranks seven and eight, respectively. The less dynamic NUROFEN (+2%), DETRALEX (+10%) and LOZAP (+8%) moved down to ranks four, five and ten. The total share of the top ten ranking increased by 1.2 p.p. to 6.9%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
2020	2019		2020	2019
1	4	INGAVIRIN	1.1	0.6
2	39	ARBIDOL	1.1	0.3
3	1	XARELTO	0.9	0.7
4	2	NUROFEN	0.6	0.7
5	3	DETRALEX	0.6	0.6
6	17	ELIQUIS	0.6	0.4
7	7	PENTALGIN	0.5	0.5
8	8	ESSENTIALE	0.5	0.5
9	18	HEPTRAL	0.5	0.4
10	6	LOZAP	0.5	0.5
Total			6.9	5.2

XYLOMETAZOLINE (-1%) continued to hold its previous rank number one in the top 10 INNs and group names ranking despite the negative growth rates (Table 3). The newcomers UMIFENOVIR (3.6-fold growth in sales) and IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID (2.1-fold growth) broke into the top ten ranking, coming in at numbers two and three. INN RIVAROXABAN (+39%) managed to move one rank up, coming in at number seven. In contrast, the remaining INNs of the top ten ranking fell in the ranks; The composition DIOSMIN*HESPERIDIN (+5%), as well as INNs IBUPROFEN (+5%), PANCREATIN (+13%), NIMESULIDE (+23%), BISOPROLOL (+8%) и ROSUVASTATIN (+1%) moved down to ranks four through six and three bottom ranks, respectively. The cumulative share of the top10 increased from 8.7% to 9.9%.

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

Rank		INNs/Grouping Names	Share in total pharmacy sales, %	
2020	2019		2020	2019
1	1	XYLOMETAZOLINE	1.3	1.4
2	43	UMIFENOVIR	1.2	0.4
3	17	IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID	1.1	0.6
4	2	DIOSMIN*HESPERIDIN	1.1	1.1
5	3	IBUPROFEN	1.0	1.0
6	4	PANCREATIN	1.0	1.0
7	8	RIVAROXABAN	0.9	0.7
8	7	NIMESULIDE	0.8	0.8
9	6	BISOPROLOL	0.8	0.8
10	5	ROSUVASTATIN	0.8	0.8
Total			9.9	8.7

J05 Antivirals for systemic use (+95%) showed the highest sales volume and the highest growth rates at the end of the year (Table 4). C09 Drugs acting on the renin-angiotensin system (+15%) held and reinforced rank two, while the previous leader M01 Anti-inflammatory and antirheumatic drugs (+9%) moved up to rank three. In addition to the leader, another two ATC groups of the top ten managed to rise in the ranks. J01 Antibacterials for systemic use (+33%) and N02 Analgesics (+18%) moved up to ranks four and eight. At the same time, the less dynamic groups G03 Sex hormones and R01 Nasal preparations (+1% each), as well as R05 Cough and cold preparations (+7%) lost two rating points each. B01 Antithrombotic agents (+20%) and C05 Vasoprotectives (+6%) retained their ranks six and ten, to which they had moved a year earlier. In total, the top ten ATC-groups accumulated 38.9% of the regional market, whereas in the year-earlier period they accounted for 36.5%.

Table 4. The top ten ATC Groups by pharmacy sales

Rank		ATC code	ATC group	Share in total pharmacy sales, %	
2020	2019			2020	2019
1	8	J05	ANTIVIRALS FOR SYSTEMIC USE	5.5	3.2
2	2	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.1	5.0
3	1	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.9	5.0
4	5	J01	ANTIBACTERIALS FOR SYST USE	4.0	3.4
5	3	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.9	4.3
6	6	B01	ANTITHROMBOTIC AGENTS	3.4	3.2
7	4	R01	NASAL PREPARATIONS	3.2	3.5
8	9	N02	ANALGESICS	3.2	3.0
9	7	R05	COUGH AND COLD PREPARATIONS	3.0	3.2
10	10	C05	VASOPROTECTIVES	2.7	2.8
Total				38.9	36.5

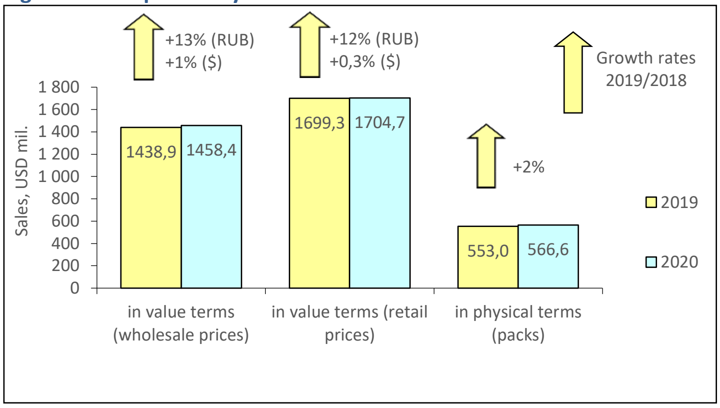
Conclusion. In 2020, the retail pharmacy market of the Ural Federal District brought in RUB 93.468 bil. (USD 1.295 bil.) at retail prices. The regional sales increased by 13% in rouble terms and 1% in dollar terms. In physical terms, the market showed negative growth rates (-2%) and amounted to 382.248 mil. packs. The average cost of an FPP pack in the district pharmacies was USD 3.39, which was slightly over than the figure in the year-earlier period (USD 3.30), and equal to the national average (USD 3.39) based on the results for 2020. The average expenses of the UFD residents for medications in the pharmacies were lower than the national average (USD 104.78 vs. USD 108.28).

SiFD PHARMACY MARKET: 2020 RESULTS

According to Federal State Statistics Service, as of January 1, 2020 estimated population of the Siberian Federal District (SiFD. 17.118 mil., which accounted for 11.7% of the total Russian Federation population. According to Federal State Statistics Service's data, in 2020 the average wage in the Siberian FD FD was RUB 43897 (USD 608.83), which was 14% lower than the national average wage in Russia (RUB 51083).

According to the results of the Retail Audit of FPP drugs in Russian Federation™, in 2018 the SiFD pharmacy market volume in physical terms extended by 2% to 566.632 mil. packs (Fig. 1). In terms of wholesale prices, the market showed the positive performance both in rouble (+13%) and dollar (+1%) equivalents and amounted to RUB 105.296 bil. (USD 1.458 bil.), The district's share accounted for 10.7% of the total pharmacy sales in the Russian pharmacy market pattern. In 2020, the average cost of an FPP pack in the SiFD pharmacies was USD 3.01, whereas in the year-earlier period its cost was USD 3.07. Average expenses of the SiFD residents for purchase of drugs in the pharmacies amounted to USD 99.58 based on the results for the year.

Figure 1. SiFD pharmacy market in 2019 – 2020



At end of 2020, the top 10 manufacturers in the pharmacy market of the Siberian Federal District remained unchanged in composition (Table 1). However, only one manufacturer BAYER (+13%), the leader of the top ten ranking, held its previous rank. Shifts took place in the lower part of the top ten, but only three manufacturers managed to rise in the ranks. OTCPHARM (+36%) moved up to rank two from six, SANDOZ (+24%) moved up to rank six from eight, and ABBOTT (+12%) moved up to rank nine from ten. At the same time, STADA (+6%), SANOFI (+3%), TEVA (+5%), KRKA (+11%) and GEDEON RICHTER (+2%) lost one rank each, moving down to ranks three through five, eight and ten, respectively. SERVIER (+4%) moved two ranks down, coming in at number seven. The total share of the top 10 manufacturers has reduced from 34.4% to 33.9%

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
2020	2019		2020	2019
1	1	**BAYER**	4.4	4.4
2	6	OTCPHARM	4.1	3.4
3	2	**STADA**	3.9	4.1
4	3	**SANOFI**	3.7	4.1
5	4	**TEVA**	3.3	3.5
6	8	**SANDOZ**	3.2	2.9
7	5	**SERVIER**	3.2	3.4
8	7	**KRKA**	3.1	3.2
9	10	**ABBOTT**	2.6	2.6
10	9	GEDEON RICHTER	2.5	2.7
Total			33.9	34.4

*AIPM members are in bold

Three newcomers broke into the ranks of the top ten brands ranking (Table 2). The antivirals INGAVIRIN and ARBIDOL, which sales increased 3.2 and 4 times, respectively, topped the top ten ranking, and ELIQUIS (+62%) moved up to number four. Almost all remaining brands of the top ten ranking fell in the ranks. Among them were XARELTO (+47%) and LORISTA (+18%), which showed outstripping growth rates and moved three ranks down to ranks three and five. The brands DETRALEX (+10%), CARDIOMAGNYL and NUROFEN (+12% each), and LOZAP (+4%) moved down to ranks six, seven and two bottom ranks, respectively. PENTALGIN (+16%) held its previous rank eight. In total, the top ten manufacturers accumulated 7.7% of sales vs 5.8% 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, %	
2020	2019		2020	2019
1	21	INGAVIRIN	1.2	0.4
2	46	ARBIDOL	1.0	0.3
3	1	XARELTO	0.9	0.7
4	12	ELIQUIS	0.7	0.5
5	2	LORISTA	0.7	0.7
6	3	DETRALEX	0.6	0.7
7	6	CARDIOMAGNYL	0.6	0.6
8	8	PENTALGIN	0.6	0.6
9	5	NUROFEN	0.6	0.6
10	4	LOZAP	0.6	0.7
Total			7.7	5.8

Following the respective brands, INNs IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID (3.2-fold growth in purchases) and UMIFENOVIR (3.8 times) broke into the top ten ranking for the first time and moved up to ranks two and three (Table 3). Another newcomer, RIVAROXABAN (+47%), moved up to rank seven. They displaced INNs BISOPROLOL (+10%), IBUPROFEN (+13%), as well as the composition DIOSMIN*HESPERIDIN (+14%) two ranks down, to numbers four through six, while NIMESULIDE (+20%), LOSARTAN (+19%) and PANCREATIN (+10%) more significantly lowered their positions and moved down to the bottom ranks of the top ten ranking. XYLOMETAZOLINE (+8%) held its previous rank number one. The cumulative share of the top-ten increased by 1.7 p.p. and achieved 10.3%

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

Rank		INNs/Grouping Names	Share in total pharmacy sales, %	
2020	2019		2020	2019
1	1	XYLOMETAZOLINE	1.4	1.5
2	41	IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID	1.2	0.4
3	47	UMIFENOVIR	1.1	0.3
4	2	BISOPROLOL	1.1	1.1
5	3	IBUPROFEN	1.1	1.1
6	4	DIOSMIN*HESPERIDIN	1.0	1.0
7	12	RIVAROXABAN	0.9	0.7
8	5	NIMESULIDE	0.9	0.9
9	7	LOSARTAN	0.9	0.8
10	6	PANCREATIN	0.8	0.8
Total			10.3	8.6

C09 Agents acting on the rennin-angiotensin system (+15%) and M01 Anti-inflammatory and antirheumatic products (+12%) continued to remain the best-selling groups on the regional market (Table 4). J05 Antivirals for systemic use, which showed a twofold increase in sales and broke into the top ten ranking for the first time, moved up to rank three. Another newcomer L03 Immunostimulants (+45%) rounded out the top ten ranking. It should be noted that in addition to the leader, the markets of another four brands of the top ten ranking developed their markets at a fast pace. J01 Antibacterials for systemic use (+42%) moved up to rank four, B01 Antithrombotic agents (+26%) held their previous rank six, and N02 Analgesics (+21%) and R05 Cough and cold preparations (+15%) lost one rating point each. The markets of two groups, G03 Sex hormones (+2%) and R01 Nasal preparations (+4%), developed at a slow pace, which also resulted in the loss of their ranking positions – they moved down to ranks five and nine, respectively. The share of the top ten ATC groups amounted to 39.6%, exceeding the previous year figures by 3.6 p.p.

Table 4. The top ten ATC Groups by pharmacy sales

Rank		ATC code	ATC group	Share in total pharmacy sales, %	
2020	2019			2020	2019
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.4	5.3
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.0	5.0
3	12	J05	ANTIVIRALS FOR SYSTEMIC USE	4.9	2.7
4	7	J01	ANTIBACTERIALS FOR SYST USE	4.2	3.3
5	3	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.9	4.3
6	6	B01	ANTITHROMBOTIC AGENTS	3.7	3.4
7	5	N02	ANALGESICS	3.7	3.4
8	4	R01	NASAL PREPARATIONS	3.2	3.5
9	8	R05	COUGH AND COLD PREPARATIONS	3.0	3.0
10	18	L03	IMMUNOSTIMULANTS	2.6	2.1
Total				39.6	36.0

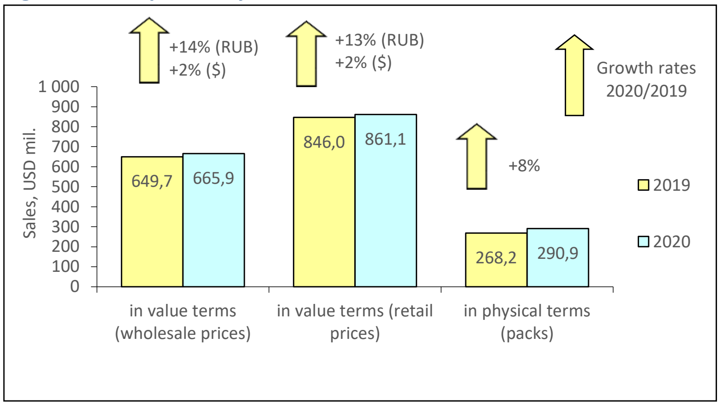
Conclusion. At the year-end 2020, the pharmacy market in the Siberian Federal District was estimated at RUB 123.073 bil. (USD 1705 bil.) at final consumer prices. At the same time, the market behaviour was positive both in rouble (+12%) and dollar (+0.3%) terms. In natural terms, the sales increased by 2% and amounted to 566.632 mil. packs. The average cost of an FPP pack decreased as compared to the same period last year (USD 3.01 vs. USD 3.07) and continued to be lower than the national average FPP price (USD 3.39). Per capita expenses of the district residents for purchase of medicines in the pharmacies were also lower than the national average figures (USD 99.58 vs. USD 108.28).

FEFD PHARMACY MARKET: 2020 RESULTS

According to Federal State Statistics Service, as of January 1, 2020 estimated population of the Far Eastern Federal District (FEFD) was 8.169 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 2020 the average wage in the Far Eastern FD was RUB 59863 (USD 830.28), which was 17% higher than the average wage in Russia (RUB 51083).

According to the results of the Retail Audit of Finished Pharma Products in Russian Federation™, at year-end 2020 the sales of drugs in physical terms in the pharmacies of the FEFD saw an 8% increase to 290.922 mil. packs. In money terms, the market saw a 14% increase in terms of roubles and 2% in terms of dollars. At the same time, the volume of the market achieved RUB 48.029 bil (USD 665.910 mil.) at wholesale prices (Fig. 1). The district's share reached 5.4% of the all-Russia sales in retail prices. The average cost of a pack decreased as compared to a year earlier period (USD 3.15) and amounted to USD 2.96. At the end of 2020, the average amount spent by the FEFD residents for drugs in the pharmacies amounted to USD 105.40.

Figure 1. FEFD pharmacy market in 2019 – 2020



BAYER (+18%) 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). OTCPHARM (+53%) moved up to rank two from nine due to the highest growth rates among the leaders, displacing STADA (+9%) and KRKA (+8%) one rank down. In addition to the leaders, SANDOZ (+18%) developing at a fast pace, which allowed it to move three ranks up, coming in at number five. The market growth rates of the remaining manufacturers lagged behind the market average, as a result of which four of them fell in the ranks. SANOFI and TEVA (+7% each), SERVIER (+6%) and GEDEON RICHTER (+2%) moved down to ranks six through nine, respectively. As before, GLAXOSMITHKLINE (+6%) rounded out the top ten rating. The aggregate share of the top ten reduced from 35.1% to 34.8%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
2020	2019		2020	2019
1	1	**BAYER**	4.6	4.5
2	9	OTCPHARM	4.3	3.2
3	2	**STADA**	4.0	4.2
4	3	**KRKA**	3.4	3.6
5	8	**SANDOZ**	3.3	3.2
6	4	**SANOFI**	3.2	3.4
7	5	**TEVA**	3.2	3.4
8	7	**SERVIER**	3.1	3.4
9	6	GEDEON RICHTER	3.0	3.4
10	10	**GLAXOSMITHKLINE**	2.6	2.8
Total			34.8	35.1

*AIPM members are in bold

INGAVIRIN, which showed a twofold increase in sales, moved up to rank number one from four in the top ten brands ranking (Table 2). The market of the antiviral drug ARBIDOL developed even more rapidly (4.2-fold growth in sales), which moved up to rank two and became the only newcomer of the top 10 ranking. XARELTO brand (+41%) retained and strengthened its rank three. THERAFLU (+16%) and MIRAMISTIN (+15%), which showed lower but outstripping growth rates, moved up to ranks five and eight. On the contrary, the brands NUROFEN (+10%), CARDIOMAGNYL (+3%), KAGOCEL (-7%) and CONCOR (+8%) moved down to the lower ranks. LORISTA (+8%) held its previous rank six. The aggregate share of the top-10 expended from 7% to 8.5%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
2020	2019		2020	2019
1	4	INGAVIRIN	1.4	0.7
2	35	ARBIDOL	1.3	0.3
3	3	XARELTO	0.9	0.8
4	1	NUROFEN	0.8	0.9
5	7	THERAFLU	0.7	0.7
6	6	LORISTA	0.7	0.7
7	5	CARDIOMAGNYL	0.7	0.7
8	9	MIRAMISTIN	0.7	0.7
9	2	KAGOCEL	0.6	0.8
10	8	CONCOR	0.6	0.7
Total			8.5	7.0

In spite of the change of leader in the prior ranking, XYLOMETAZOLINE (+8%) held its previous rank number one in the top ten INN and group names rating (Table 3). The newcomers IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID (2.1-fold growth in sales) and UMIFENOVIR (4.1-fold growth) broke into the top ten ranking, coming in at numbers two and three. Another composition AMOXICILLIN*CLAVULANIC ACID (+24%), which broke into the top ten ranking for the first time, rounded it out. Among INNs that remained, only RIVAROXABAN (+41%) managed to move up from rank nine to six, while five INNs, on the contrary, moved down to the lower ranks. These were IBUPROFEN (+11%), BISOPROLOL (+15%), NIMESULIDE (+16%), DIOSMIN*HESPERIDIN (+14%) and PANCREATIN (+8%). The total share of the top 10 expanded by almost 2 p.p. and accounted for 11.2%

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

Rank		INNs/Grouping Names	Share in total pharmacy sales, %	
2020	2019		2020	2019
1	1	XYLOMETAZOLINE	1.7	1.8
2	11	IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID	1.4	0.7
3	44	UMIFENOVIR	1.4	0.4
4	2	IBUPROFEN	1.3	1.3
5	3	BISOPROLOL	1.0	1.0
6	9	RIVAROXABAN	0.9	0.8
7	5	NIMESULIDE	0.9	0.9
8	6	DIOSMIN*HESPERIDIN	0.9	0.9
9	4	PANCREATIN	0.9	0.9
10	12	AMOXICILLIN*CLAVULANIC ACID	0.8	0.7
Total			11.2	9.5

The leader of the top-10 ATC groups ranking changed. J05 Antivirals for systemic use moved up to rank one from six due to 77% growth in sales (Table 4). At the same time, they displaced the less dynamic C09 Agents acting on the rennin-angiotensin system (+16%) and M01 Anti-inflammatory and antirheumatic products (+13%) one rank down. Another two ATC groups of the top ten ranking managed to move to the higher ranks. B01 Antithrombotic agents (+25%) moved up to rank eight, and the newcomer L03 Immunostimulants (+42%) broke into the top 10 for the first time, rounding it out. At the same time, the groups R01 Nasal preparations (+3%), J01 Antibacterials for systemic use (+12%) and R05 Cough and cold preparations (+6%) moved down to ranks five, six and nine, respectively. J01 Antibacterials for systemic use (+27%) and N02 Analgesics (+19%) held their previous ranks four and seven. The total share of the analysed ranking accounted for 39.7% against 37.1% in a year-earlier period.

Table 4. The top ten ATC Groups by pharmacy sales

Rank		ATC code	ATC group	Share in total pharmacy sales, %	
2020	2019			2020	2019
1	6	J05	ANTIVIRALS FOR SYSTEMIC USE	5.5	3.5
2	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	4.9	4.9
3	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.8	4.8
4	4	J01	ANTIBACTERIALS FOR SYST USE	4.1	3.7
5	3	R01	NASAL PREPARATIONS	3.7	4.1
6	5	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.6	3.7
7	7	N02	ANALGESICS	3.5	3.4
8	9	B01	ANTITHROMBOTIC AGENTS	3.4	3.1
9	8	R05	COUGH AND COLD PREPARATIONS	3.1	3.3
10	13	L03	IMMUNOSTIMULANTS	3.1	2.5
Total				39.7	37.1

Conclusion. On the basis of the results for 2020, the retail market of the Far Eastern Federal District brought in RUB 62.117 bil. (USD 861.073 mil.), which was by 13% in terms of roubles and 2% in terms of dollars more than in 2019. In pack terms, the market also showed positive growth rates (+8%) and achieved 290.922 mil. packs. In 2020, the average cost of a pack in the FEFD pharmacies was USD 2.96, (in a year-earlier period - USD 3.15), which was lower than the national average (USD 3.39). The average medicine expenses of the district residents were also lower than the national average expenses in Russia (105.40 USD vs. 108.28 USD).