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

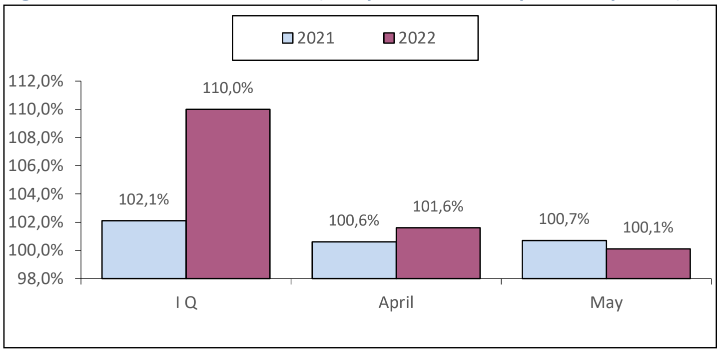
MACROECONOMIC INDICES

Inflation

According to Federal State Statistics Service's data, the Consumer Price Index was estimated at 100.1% in May 2022 as compared to the previous month, 111.8% relative to December 2021.

In May 2022, Industrial Producer Price Index was 93.1% as compared to the previous month, in the month-earlier period it had amounted to 106.3%. The index accounted for 109.1% as against December of 2021.

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



Living standard

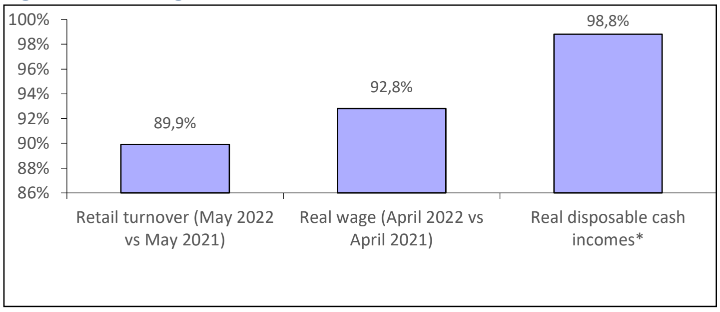
In April of 2022, a gross monthly average wage of corporate employees reached RUB 62269 (USD 800.27). It accounted for 109.4% compared to April 2021, and 93.1% compared to the previous period. In April of 2022, the real gross wage accounted for 92.8% as compared to April of 2021, and 91.7% against the prior period.

According to estimates[1], real disposable cash incomes decreased by 98.8% in the first half of 2022 as compared to the first half of 2021 (Fig. 2).

Retail turnover

In May 2022, the retail turnover was equal to RUB 3417.7 bil. or 89.9% (in comparable prices) against the respective period of the previous year, and RUB 17031.7 bil. or 97.9% in January - May 2022 (Fig. 2).

Figure 2. Real wage and retail turnover



* I Quarter 2022 vs I Quarter 2021

Industrial Production

According to Federal State Statistics Service's data, in May 2022 Industrial Production Index accounted for 98.3% compared to the same period in 2014, and 102.8% in January-May 2022.

According to Federal State Statistics Service's data, Industrial Production Index for drugs and medical products in May 2022 accounted for 129.4% compared to the same period in 2021, and 128.4% in January-May 2022 relative to January-May 2021.

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 2022.

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

Table 1. The top ten Russian chemical and pharmaceutical manufacturers by sales in May 2022

Rank	Manufacturer	RUB mil.
1	Biocad	3652.5
2	Pharmasyntez	2457.0
3	Stada	2324.6
4	Binnopharm	2250.3
5	Otcpharm	2221.4
6	Pharmstandart	1924.6
7	Grotex	1373.9
8	Atoll	1359.7
9	Vertex	1321.7
10	Generium	1228.5

Source: IQVIA

Table 2 provides pharmacy sales data from 10 regions of the Russian Federation. In April 2022 compared to March 2022, reduction in pharmacy sales (in terms of roubles) was reported in almost all analysed regions. The lowest performance was observed in Moscow (-55%), the highest one in Tatarstan (-31%).

Table 2. Pharmacy sales in the regions, 2022

Region	Pharmacy sales, $ mil. (wholesale prices)			Growth gain, % (roubles)		
	February 2022	March 2022	April 2022	February/January 22	March / February 22	April/March 22
Moscow	201.2	251.3	151.1	15%	67%	-55%
St. Petersburg	90.4	101.8	69.2	13%	51%	-49%
Krasnodar Krai	58.3	52.9	41.5	21%	22%	-41%
Krasnoyarsk Krai	28.2	26.4	23.2	12%	25%	-34%
Tatarstan	26.5	24.6	22.8	13%	25%	-31%
Rostov Region	33.1	29.7	23.2	17%	20%	-42%
Novosibirsk Region	28.0	26.5	23.0	13%	27%	-35%
Voronezh Region	20.0	20.0	14.3	23%	35%	-46%
Perm	10.3	10.4	9.0	8%	36%	-35%
Tyumen	9.9	10.2	8.6	19%	39%	-37%

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 2022

Rank	Company*	Quantity of broadcasts
1	Otcpharm	10,228
2	Dr. Reddy's Laboratories	7,619
3	Stada	5,794
4	Binnopharm	3,157
5	Egis	2,483

Source - Remedium according to Mediascope's data

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

Rank	Brand*	Quantity of broadcasts
1	Pentalgin	2,638
2	Nalgezin	2,310
3	Momate Rhino	1,951
4	Cetrine	1,812
5	Allerway	1,589

Source - Remedium according to Mediascope's data

* Only drugs registered with National Medicine Register were considered.

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

According to IQVIA DLO in RF™, the drug supplies under the Federal Program amounted to RUB 50,420 bil. based on the results for the first three months of 2022 (USD 611.063 mil.) at contract prices. The sector volume reduced by 6% in terms of roubles and 16% in terms of dollars as compared to the same period of 2021. The scope of supplies in pack terms increased by 11% to 25.180 mil. packs. The average cost of a FPP pack through the DLO program was USD 24.27 in contractual prices (a year ago it was USD 32.01).

At the first quarter-end of 2022, the leader of the top ten manufacturers in the DLO segment changed (Table 1). GENERIUM (-33%[2]), which had topped the rating earlier, reduced its volumes of drugs purchases by one third and moved down to rank three, giving way to the manufacturers with positive growth rates CELGENE (+2%) and TAKEDA (+17%). In addition to the leaders, another four manufacturers showed growth gains in purchases. Three of them, JOHNSON & JOHNSON (+10%), ROCHE (2.1-fold growth in purchases) and SANOFI (+2%) moved to ranks four, five and eight, respectively. Meanwhile, NOVARTIS (+2%) lost one rating point despite the positive growth rates. Due to one fourth reduction in purchases, BIOCAD (-25%) moved down from rank four to six. Two more manufacturers with negative growth rates rounded out the top ten. NOVO NORDISK (-1%) and CINNAGEN (-2%) moved up to ranks nine and ten. The latter became the only newcomer of top 10. The total share of the top ten drug manufacturers under DLO Program extended by 4 p.p. and accounted for 66.9%.

Table 1. The top 10 drug manufacturers for DLO*

Rank in the top ten		Manufacturer*	Share in total DLO volume, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	2	**CELGENE**	12.7	11.7
2	3	**TAKEDA**	12.2	9.8
3	1	GENERIUM ZAO RF	9.7	13.5
4	5	**JOHNSON & JOHNSON**	7.2	6.2
5	8	**ROCHE**	7.2	3.3
6	4	BIOCAD RF	5.4	6.7
7	6	**NOVARTIS**	5.0	4.6
8	9	**SANOFI**	3.1	2.8
9	10	**NOVO NORDISK**	2.5	2.3
10	14	CINNAGEN CO	2.1	2.0
Total			66.9	62.9

*AIPM members are in bold

Three newcomers broke into the ranks of the top ten brands ranking (Table 2). TYSABRI (2.7-fold growth in purchases, HEMLIBRA and SINNOVEX (-2%) moved up to ranks four, seven and ten, respectively. The markets of another two brand names ELAPRASE (+51%) and OCREVUS (+44%) also developed by high growth rates, which allowed them to move up to ranks two and three of the top ten. Despite a 1% decrease in purchases ILARIS managed to improve its ranking by 2 points. The brands OCTOFACTOR (-46%), ELIZARIA (-15%) and ADVATE (-26%) which showed pronounced negative growth rates moved down to ranks five, six and nine respectively. REVLIMIDE (+2%) held and reinforced its previous leading position in the ranking. Its total share grew from 33.4% to 39.1%.

Table 2. The top 10 Brands in DLO segment

Rank in the top ten		Brand	Share in total DLO volume, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	1	REVLIMIDE	12.7	11.7
2	5	ELAPRASE	4.5	2.8
3	9	OCREVUS	3.6	2.3
4	24	TYSABRI	3.2	1.1
5	2	OCTOFACTOR	3.1	5.3
6	4	ELIZARIA	3.0	3.4
7	48	HEMLIBRA	2.4	0.0
8	10	ILARIS	2.4	2.3
9	6	ADVATE	2.1	2.7
10	13	SINNOVEX	2.1	2.0
Total			39.1	33.4

Just as the corresponding brand, LENALIDOMIDE (+2%) continued to hold rank number one in the top 10 INN and group names ranking (Table 3). Some shifts took place in the lower part of the top ten manufacturers ranking, as a result of which six INNs rose in the ranks. IDURSULFASE (+51%) and INTERFERON BETA-1A (+10%) moved up to ranks two and three. The newcomers OCRELIZUMAB (+44%), NATALIZUMAB (2.7-fold growth in purchases), EMICIZUMAB and CANAKINUMAB (-1%) broke into the top ten, moving up to ranks four, five, eight and nine. In contrast, MOROCTOCOG ALFA (-46%), ECULIZUMAB (-15%) and OCTOCOG ALFA (-26%) reduced its purchases and moved down to the lower ranks. The total share of the top 10 increased from 35% to 41.2%.

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

Rank in the top ten		INN/Grouping name	Share in total DLO volume, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	1	LENALIDOMIDE	12.7	11.7
2	7	IDURSULFASE	4.5	2.8
3	5	INTERFERON BETA-1A	4.2	3.6
4	12	OCRELIZUMAB	3.6	2.3
5	22	NATALIZUMAB	3.2	1.1
6	3	MOROCTOCOG ALFA	3.1	5.3
7	6	ECULIZUMAB	3.0	3.4
8	48	EMICIZUMAB	2.4	0.0
9	13	CANAKINUMAB	2.4	2.3
10	8	OCTOCOG ALFA	2.1	2.7
Total			41.2	35.0

Four of the top-10 ATC groups held their own in the top ten ranking (Table 4). L04 Immunosuppressants (+8%), B02 Antihemorrhagics (-28%), L03 Immunostimulants (-2%) and L02 Endocrine therapy (-14%) kept their previous ranks one, two, four and ten. The groups A16 Other alimentary tract and metabolism products (+39%) and B01 Antithrombotic agents (+34%) showed high growth rates and rose in the ranks. The newcomer H01 Pituitary and hypothalamic hormones and analogues were not developing so dynamically, but increased their purchases by 3%, moving up to rank nine. In contrast, the groups L01 Antineoplastic agents (-37%), A10 Drugs used in diabetes (+28%) (-7%) and R03 Drugs for obstructive airway diseases (+1%) moved down to the lower ranks. The total share of the top 10 reduced from 90.2% to 89.8%.

Table 4. The top ten ATC groups in DLO segment

Rank in the top ten		ATC code	ATC group	Share in total DLO volume, %	
3 mon. 2022	3 mon. 2021			3 mon. 2022	3 mon. 2021
1	1	L04	IMMUNOSUPPRESSANTS	33.8	29.2
2	2	B02	ANTIHEMORRHAGICS	17.1	22.1
3	6	A16	OTHER ALIMENTARY TRACT AND METABOLISM PRODUCTS	9.0	6.0
4	4	L03	IMMUNOSTIMULANTS	8.2	7.9
5	3	L01	ANTINEOPLASTIC AGENTS	8.0	12.0
6	5	A10	DRUGS USED IN DIABETES	7.0	7.0
7	8	B01	ANTITHROMBOTIC AGENTS	2.3	1.6
8	7	R03	DRUGS FOR OBSTRUCTIVE AIRWAY DISEASES	2.0	1.9
9	11	H01	PITUITARY, HYPOTHALAMIC HORMONES AND ANALOGUES	1.3	1.2
10	10	L02	ENDOCRINE THERAPY	1.2	1.3
Total				89.8	90.2

Data on supplies to the top ten regions of Russia under State Reimbursement Program (DLO) are shown in Table 5. Moscow (+32%) moved up to rank one from four, while Sverdlovsk region (-0.2%) and Moscow region (-2%) held ranks two and three. It should be noted that in addition to the leader, two more regions, Tatarstan and Nizhny Novgorod region showed positive growth rates. In the remaining regions, purchases under the program decreased to varying degrees as compared to the same period of the last year. The total share of the top ten regions increased by 1 p.p. and accounted for 33.8%.

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

Rank in the top ten		Region	Share in total DLO volume, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	4	Moscow	5.3	3.7
2	2	Sverdlovsk Region	4.2	4.0
3	3	Moscow Region	4.0	3.9
4	5	Tatarstan Republic	3.5	3.2
5	6	Rostov Region	3.3	3.2
6	9	Krasnoyarsk Region	3.0	2.8
7	1	Krasnodar Krai	2.8	4.2
8	12	Nizhny Novgorod Region	2.7	2.3
9	7	Novosibirsk Region	2.7	3.0
10	10	Chelyabinsk Region	2.4	2.3
Total			33.8	32.7

Conclusion. On the basis of the results for three months of 2022, the DLO sector of Russia brought in RUB 50.420 bil. (USD 611.063 mil.) at contract prices, which is by 6% in terms of roubles and by 16% in terms of dollars less than in January-March of 2021. In pack terms, the supplies under the program increased by 11% to 25.180 mil. packs. The average cost of FPP included in the DLO Programme decreased as compared to the previous year (USD 24.27 vs USD 32.01).

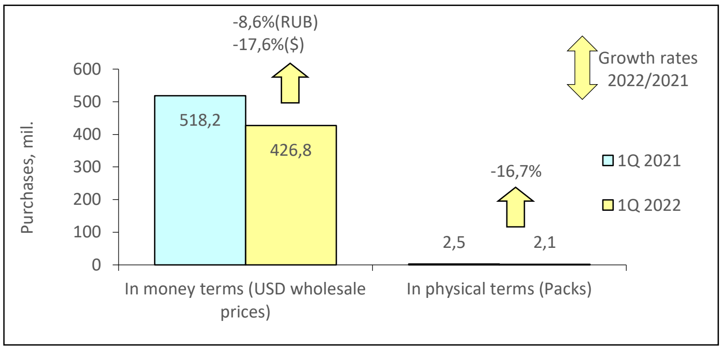
[2]Hereinafter, unless otherwise stated, growth gains are stated in the rouble equivalent or national currency.

* Here and elsewhere IQVIA's data are used

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

According to IQVIA, at the end of the first quarter 2022 the volume of supplies under the VZN program in contract prices amounted to RUB 35.2 bil. (USD 426.8 mil.) (Fig. 1). The purchases saw a 8.6% decrease in terms of national currency and a 17.6% decrease in terms of dollars as compared to the same period of the previous year. In natural terms, the supplies decreased by 16.7% to 2.1 mil. packs. In 2022, the VZN procurement nomenclature was updated to include four INNs: Ixazomib и Pomalidomide for the treatment of patients with multiple myeloma, Efmoroctocog Alfa for the treatment of haemophilia A (a hereditary clotting disorder due to factor VIII deficiency), as well as Cladribine that is indicated for relapsing forms of multiple sclerosis (in the first quarter of 2022 the purchases of these INNs accounted for 1.6% of the total volume of VZN programme).

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



Compared to 1 Q 2021, the groups of drugs for the treatment of pituitary dwarfism (22-fold growth), Gaucher's disease (+84%) and mucopolysaccharidosis types I, II and VI (+32%) showed the largest increase in purchases in terms of roubles. A negative increase in purchases was recorded in the groups of drugs for the treatment of cystic fibrosis (-42%), drugs used in transplantology (-28%) and for the treatment of haemophilia (-28%). The group of drugs to treat haemophilia became the leader of the top purchases ranking in Q 1, 2022, 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 2022	1Q 2021
Sclerosis Multiplex		**25.3**	**18.5**
	INTERFERON BETA-1A	6.0	5.0
	OCRELIZUMAB	5.1	3.3
	NATALIZUMAB	4.6	1.5
	TERIFLUNOMIDE	2.9	2.8
	PEGINTERFERON BETA-1A	2.5	3.3
	GLATIRAMER ACETATE	1.6	1.1
	INTERFERON BETA-1B	1.6	1.5
	ALEMTUZUMAB	0.8	0.1
	CLADRIBINE	0.0	0.0
Oncohematology		**25.0**	**28.5**
	LENALIDOMIDE	18.1	16.3
	RITUXIMAB	2.5	8.7
	DARATUMUMAB	2.2	2.3
	IXAZOMIB	1.0	0.0
	IMATINIB	0.6	0.2
	BORTEZOMIB	0.6	0.8
	POMALIDOMIDE	0.1	0.0
	FLUDARABINE	0.0	0.3
Haemophilia		**24.2**	**30.5**
	MOROCTOCOG ALFA	4.4	7.4
	EMICIZUMAB	3.5	0.0
	OCTOCOG ALFA	3.0	3.7
	FACTOR VIII	3.0	5.9
	FACTOR VIII INHIBITOR BYPASSING FRACTION	2.8	2.5
	FACTOR VIII*FACTOR VON WILLEBRAND	2.3	4.6
	EPTACOG ALFA (ACTIVATED)	2.1	3.4
	FACTOR IX	1.3	2.4
	SIMOCTOCOG ALFA	0.9	0.0
	NONACOG ALFA	0.5	0.7
	EFMOROCTOCOG ALFA	0.4	0.0
Mucopolysaccharidosis type I, II and VI		**10.1**	**7.0**
	IDURSULFASE	6.4	3.9
	GALSULFASE	2.0	1.9
	LARONIDASE	1.1	1.2
	IDURSULFASE BETA	0.6	0.0
Hemolytic-uremic syndrome		**4.3**	**4.7**
	ECULIZUMAB	4.3	4.7
Systemic-onset juvenile arthritis.		**4.0**	**3.4**
	CANAKINUMAB	3.3	3.1
	TOCILIZUMAB	0.6	0.2
	ETANERCEPT	0.0	0.1
	ADALIMUMAB	0.0	0.0
Transplantation		**3.5**	**4.4**
	TACROLIMUS	2.7	2.8
	EVEROLIMUS	0.4	0.4
	MYCOPHENOLIC ACID	0.3	1.0
	MYCOPHENOLATE MOFETIL	0.1	0.1
	CICLOSPORIN	0.0	0.1
Gaucher disease		**2.3**	**1.1**
	VELAGLUCERASE ALFA	1.3	1.1
	IMIGLUCERASE	1.0	0.1
	TALIGLUCERASE ALFA	0.0	0.0
Mucoviscidosis		**1.1**	**1.7**
	DORNASE ALFA	1.1	1.7
Pituitary dwarfism		**0.3**	**0.0**
	SOMATROPIN	0.3	0.0

Celgene moved down to rank number one in the top ten manufacturers ranking (Table 3). Revlimid continued to be at the head of the brands ranking with a large margin from other drugs, though its share increased from 16% to 11%. Takeda moved up to rank two in the top drug manufacturers ranking. The most significant positive contribution to the procurement trend in the 1st quarter was made by Elaprase for the treatment of mucopolysaccharidosis II (+51%), which moved up to rank two in the top ten brands ranking. Another best-seller of the company, recombinant blood factor VIII Advate, moved from rank 6 to 9 in the ranking due to a 26% decrease in purchases. Generium moved to rank three from the leading position in the top ten companies ranking (Table 3). Purchases of drugs manufactured by Generium decreased by 33% compared to 1 Q 2021. The decrease in purchases was provided primarily by 46% increase in purchases of Octofactor, a recombinant blood factor VIII, and by 16% increase in purchases of Elizaria for the treatment of atypical haemolytic uremic syndrome.

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

Rank in the top ten		Brand	Share in total VZN supplies, %	
1Q 2022	1Q 2021		1Q 2022	1Q 2021
1	1	REVLIMIDE	18.1	16.3
2	5	ELAPRASE	6.4	3.9
3	9	OCREVUS	5.1	3.3
4	23	TYSABRI	4.6	1.5
5	2	OCTOFACTOR	4.4	7.4
6	4	ELIZARIA	4.3	4.7
7	68	HEMLIBRA	3.5	0.0
8	10	ILARIS	3.3	3.1
9	6	ADVATE	3.0	3.7
10	13	SINNOVEX	2.9	2.7
Total			55.7	54.5

In 2021, Roche moved up to rank 4 due to two of its drugs included in the VZN nomenclature in 2021. Ocrevus (Ocrelizumab) for the treatment of multiple sclerosis, and Hemlibra (Emicizumab) for the treatment of haemophilia A. The drugs moved up to ranks 3 and 7, respectively in the top ten brands ranking. J&J held its previous rank five in the top ten ranking though its sales increased by 20%. Tysabri, J&J's drug to treat multiple sclerosis, and a new drug, Plegridy (Peginterferon beta-1a), accounted for 49% of the company's total sales. Tysabri moved up to rank 4 from 23 in the top ten brands ranking. Biocad continued its downward run, coming at rank six. Acellbia, a biosimilar of Roche Mabthera, was not included in the top 10 brands ranking (-80% relative to 1 Q 2021).

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

Rank in the top ten		Manufacturer*	Share in total VZN supplies, %	
1Q 2022	1Q 2021		1Q 2022	1Q 2021
1	2	CELGENE	18.1	16.3
2	3	**TAKEDA**	17.2	13.5
3	1	GENERIUM ZAO RF	13.8	18.9
4	7	**ROCHE**	9.6	3.8
5	5	**JOHNSON & JOHNSON**	9.4	7.2
6	4	BIOCAD RF	6.6	8.3
7	8	**NOVARTIS**	3.7	3.6
8	12	CINNAGEN CO	2.9	2.7
9	13	VALENTA	2.8	2.1
10	6	OCTAPHARMA	2.7	5.6
Total			87.0	83.0

*AIPM members are in bold

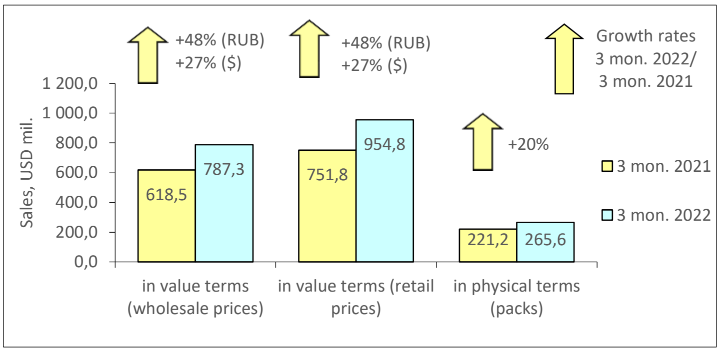
Conclusion: In total, purchases of Russian-manufactured drugs in physical terms decreased by 7.4% and those of foreign manufacture by 11.5% in the VZN segment. In case of Russian drugs, the reduction rates of purchases in value terms were also higher (-26.1% and + -9.7%, respectively). The share of Russian drugs in the VZN segment pattern markedly increased in terms of packs from 42 to 47%. In terms of roubles, the share reduced from 32% to 26%. The share of localized products (localization of the FFP stage) increased from 44% to 50% (in value terms).

* Here and elsewhere IQVIA's data are used

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

According to Federal State Statistics Service, as of January 1, 2022, estimated population of the Central Federal District (CFD) (without Moscow) was 26.469 mil., which accounted for 18.2% of the total Russian Federation population. According to Federal State Statistics Service's data, based on the results for the first quarter of 2022 the average wage in the CFD (inclusive of Moscow) was RUB 78718 (USD 929.05), which was 31% higher than the average wage in Russia (RUB 60101). According to the results of the IQVIA Retail Audit of Finished Pharma Products (FPP) in Russian Federation™, in January-March of 2022, the volume of drugs in physical terms in the CFD (excl. of Moscow) showed positive growth rates (+20%) and totalled to 265.579. In money terms, the market increased by 48% in terms of roubles and 27% in terms of dollars. At the same time, the market volume reached RUB 68.087 bil. (USD 618.456 bil.) at wholesale prices (Fig.1). The region market share accounted for 21% of the Russian pharmacy retail sales. The average cost of a pack increased as compared to 2021 and was equal to USD 3.60 against USD 3.40 at retail prices. At the end of January-March 2022, an average amount spent by the region residents for FPPs in the pharmacies amounted to USD 24.42.

Figure 1. The CFD (without Moscow) pharmacy market for 3 months of 2021 – 3 months 2022.*



BAYER (+49%) retained the largest sales volumes in the market of the Central Federal District (excluding Moscow) following the results of three months of 2022 (Table 1). SANOFI (+33%), which had been previously placed at rank two, moved down to rank six due to lagging growth rates. At the same time, the more dynamic companies OTCPHARM (+61%), STADA (+57%), SERVIER (+64%) and KRKA (+60%) moved up one rank to numbers two through six. BERLIN-CHEMIE/MENARINI (+41%) also moved up one rank, GLAXOSMITHKLINE (+54%) moved up two ranks, coming in at numbers seven and eight, respectively. ABBOTT (+46%) held its previous rank nine, and TEVA (+20%), which dropped from rank seven to last, rounded out the ranking. The cumulative share of the top 10 didn't virtually change and accounted for 35.6%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	1	**BAYER**	5.2	5.2
2	3	**OTCPHARM**	4.3	4.0
3	4	**STADA**	4.1	3.8
4	5	**SERVIER**	3.7	3.3
5	6	**KRKA**	3.6	3.3
6	2	**SANOFI**	3.6	4.0
7	8	**BERLIN-CHEMIE/MENARINI**	2.9	3.1
8	10	**GLAXOSMITHKLINE**	2.8	2.7
9	9	**ABBOTT**	2.7	2.8
10	7	**TEVA**	2.7	3.3
Total			35.6	35.5

*AIPM members are in bold

Due to 56% growth in sales, INN XARELTO held and reinforced its previous rank number one in the top ten brand names ranking (Table 2). Note that the markets of almost all remaining markets of the top ten INNs developed at a fast pace. At the same time, DETRALEX (+56%) and CONCOR (+44%), as well as the leader, held their previous ranks five and six. Five brands rose in the ranks. ARBIDOL (2.7-fold growth in sales) and INGAVIRIN (2.3-fold growth) moved up to ranks two and four, while the newcomers CARDIOMAGNYL (+18%), THERAFLU (+93%) and EDARBI (2.8-fold growth) rounded out the top ten ranking. At the same time, ELIQUIS (+89%) lost one ranking point, being displaced by more dynamic brands, while MEXIDOL (+19%) moved down from rank four to seven due to lagging growth rates. The total share of the top ten brands increased by 2 p.p. and accounted for 10.5%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	1	XARELTO	1.9	1.8
2	3	ARBIDOL	1.7	0.9
3	2	ELIQUIS	1.6	1.3
4	7	INGAVIRIN	1.1	0.7
5	5	DETRALEX	0.8	0.8
6	6	CONCOR	0.7	0.8
7	4	MEXIDOL	0.7	0.8
8	11	CARDIOMAGNYL	0.7	0.6
9	15	THERAFLU	0.7	0.5
10	31	EDARBI	0.6	0.3
Total			10.5	8.5

Two newcomers broke into the ranks of the top ten INN and group names ranking (Table 3). IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID (2.3-fold growth in sales) and ROSUVASTATIN (+84%) moved up to ranks six and nine. In addition to them, only one more brand UMIFENOVIR (2.7-fold growth) moved up to the higher position, coming in at number two. In contrast, five brands of the top ten fell in ranks. DIOSMIN*HESPERIDIN (+44%) and IBUPROFEN (+40%) lost one point each, and XYLOMETAZOLINE (+25%), BISOPROLOL (+36%) and NIMESULIDE (+45%) moved two ranks down. RIVAROXABAN (+56%) and APIXABAN (+89%) held their previous ranks one and three. The total share of the top 10 increased from 11.6% to 13%.

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

Rank in the top ten		INN/Grouping name	Share in total pharmacy sales, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	1	RIVAROXABAN	1.9	1.8
2	8	UMIFENOVIR	1.8	1.0
3	3	APIXABAN	1.6	1.3
4	2	XYLOMETAZOLINE	1.4	1.7
5	4	DIOSMIN*HESPERIDIN	1.2	1.2
6	14	IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID	1.1	0.7
7	5	BISOPROLOL	1.1	1.2
8	6	NIMESULIDE	1.0	1.0
9	11	ROSUVASTATIN	1.0	0.8
10	9	IBUPROFEN	0.9	1.0
Total			13.0	11.6

The leaders among the top ten ATC groups didn't change either. C09 Agents acting on the renin-angiotensin system (+63%) and B01 Antithrombotic agents (+56%) continued to hold the first two ranks (Table 4). The most dynamic group among the leaders, J05 Antivirals for systemic use, the sales of whose sales increased by 2.4 times, was ranked the third. Another four ATC groups of the top ten ranking showed growth in sales. G03 Sex hormones (+69%) and N02 Analgesics (+44%) moved up to ranks five and nine, and the newcomers R05 Cough and cold preparations (+14%) and A10 Drugs used in diabetes (+69%) and L03 Immunostimulants (+85%) broke into the ranks of the top ten ranking. The groups M01 Anti-inflammatory and antirheumatic products (+43%) and R01 Nasal preparations (+34%), in contrast, moved down to ranks four and six. N02 Analgesics (+50%) held their previous rank seven. In total, the top ten ATC groups accumulated 41.3% of the regional market, which was 4 p.p. more than the year-earlier period indicator (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. 2022	3 mon. 2021			3 mon. 2022	3 mon. 2021
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	6.4	5.8
2	2	B01	ANTITHROMBOTIC AGENTS	5.8	5.5
3	5	J05	ANTIVIRALS FOR SYSTEMIC USE	5.6	3.4
4	3	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.6	4.7
5	8	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.5	3.1
6	4	R01	NASAL PREPARATIONS	3.5	3.8
7	7	N02	ANALGESICS	3.3	3.3
8	11	R05	COUGH AND COLD PREPARATIONS	3.1	2.7
9	10	N06	PSYCHOANALEPTICS	2.8	2.9
10	18	A10	DRUGS USED IN DIABETES	2.7	2.2
Total				41.3	37.4

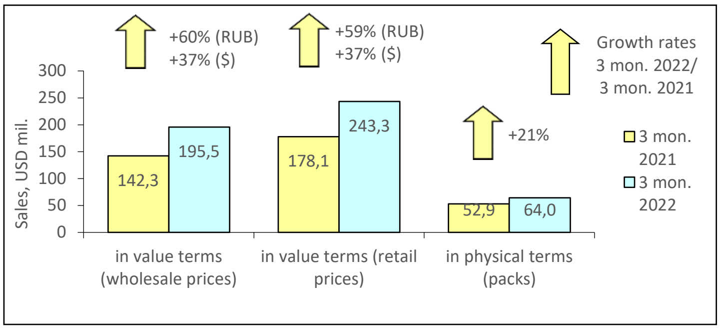
Conclusion. In January-March of 2022, the retail pharmacy market of CFD (exclusive of Moscow) brought in RUB 82.538 bil. (USD 954.842 bil.), which was 48% in terms of roubles and 27% in terms of dollars more than in the same period of 2021. In pack terms, the market also showed positive growth rates (+20%) and achieved 265.579 mil. packs. In the first quarter of 2022, the average cost of an FPP pack in the regional pharmacies was USD 3.60, which was higher than the last year figure (USD 3.40), and less than the national average (USD 3.74). The average medicine expenses of the region residents were also lower than the national average expenses in Russia (USD 24.42 vs. USD 31.33).

* Here and elsewhere IQVIA's data are used

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

According to Federal State Statistics Service, as of January 1, 2022, estimated population of the North-Western Federal District (NWFD) (exclusive of St. Petersburg) was 8.524 mil., which accounted for 5.9% of the total Russian Federation population. According to Federal State Statistics Service's data, based on the results for the first quarter of 2022 the average wage in the NWFD (without St. Petersburg) was RUB 67422 (USD 795.73), which was 12% higher than the average wage in Russia (RUB 60101). According to the results of the IQVIA Retail Audit of Finished Pharmaceutical Products (FPP) in Russian Federation™, at the first quarter-end 2022 the sales of drugs in physical terms in the NWFD (without St. Petersburg) saw high positive growth rates (+21%) and amounted to 63.976 mil. packs. In money terms, the market increased by 60% in terms of roubles and 37% in terms of dollars. At the same time, the volume of the market achieved RUB 16.936 bil. (USD 195.468 mil.) at wholesale prices (Fig. 1). The share of the region accounted for 5.4% of the Russian retail pharmacy sales. The average cost of an OTC pack in the pharmacies increased: USD 3.80 vs. USD 3.37 at retail prices in the year-earlier period. For three months of 2022, the average amount spent on drugs by residents of the region in the pharmacies amounted to USD 17.50.

Figure 1. The NWFD (without St. Petersburg) pharmacy market for 3 months 2021 – 3 months 2022



Due to outstripping rates, BAYER (+62%) and OTCPHARM (+72%) held and reinforced its leading positions in the top ten manufacturers ranking in the pharmacy market of NWFD (exclusive of St. Petersburg) at the end of January-March of 2022 (Table 1). The markets of SERVIER (+83%) and GLAXOSMITHKLINE (+95%) developed at even faster pace, which allowed them to move up to ranks three and seven. Note that the latter became the only newcomer of the top-10 ranking. Not so high, but outstripping growth rates were demonstrated KRKA (+63%) and BERLIN-CHEMIE/MENARINI (+67%), which moved up one rank, coming in at numbers five and nine. Sales of STADA and SANOFI (+58% each), as well as TEVA (+48%) and GEDEON RICHTER (+40%) grew slightly less than the market, which led three of them to the loss of one rating position, and the latter moved two points down. The cumulative share of the top 10 manufacturers expanded from 37.1% to 38.0%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	1	**BAYER**	5.4	5.3
2	2	OTCPHARM	5.0	4.7
3	4	**SERVIER**	4.3	3.8
4	3	**STADA**	3.9	4.0
5	6	**KRKA**	3.7	3.6
6	5	**SANOFI**	3.7	3.7
7	11	**GLAXOSMITHKLINE**	3.2	2.6
8	7	**TEVA**	3.1	3.4
9	10	**BERLIN-CHEMIE/MENARINI**	2.9	2.8
10	8	GEDEON RICHTER	2.8	3.2
Total			38.0	37.1

*AIPM members are in bold

The leading three groups didn't change their ranks in the top ten brands ranking. ARBIDOL (2.4-fold growth in sales), XARELTO (+89%) and ELIQUIS (2.7-fold growth) held their previous top three positions. 2). Some shifts took place in the lower part of the top ten manufacturers ranking, as a result of which four INNs rose in the ranks. INGAVIRIN (2.9-fold growth) moved up to rank four from six, DETRALEX (2-fold growth) moved up to rank three from seven. The brands that entered the top ten for the first time, THERAFLU (3.8 times) and NIMESIL (2.5 times) moved up to ranks five and eight, respectively. Due to lagging behind the growth rates, the brands NUROFEN (+52%) and CONCOR (+42%) moved down to ranks seven and nine. Despite 66% growth in sales, LORISTA also lost two ranking points. The total share of the top 10 brands increased from 8.8% to 12.2%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	1	ARBIDOL	2.5	1.6
2	2	XARELTO	1.8	1.5
3	3	ELIQUIS	1.7	1.0
4	6	INGAVIRIN	1.4	0.8
5	18	THERAFLU	1.1	0.4
6	7	DETRALEX	0.9	0.7
7	5	NUROFEN	0.8	0.8
8	14	NIMESIL	0.7	0.5
9	4	CONCOR	0.7	0.8
10	8	LORISTA	0.7	0.7
Total			12.2	8.8

The first three names of the top ten INNs and grouping names ranking repeated those of the previous ranking (Table 3). They included: UMIFENOVIR (2.5-fold growth in sales) and RIVAROXABAN (+89%), which held their own in the ranking, as well as APIXABAN (2.7-fold growth), which moved up to rank three from eight. In addition to it, the newcomers of the top ten IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID (2.9-fold growth) and ROSUVASTATIN (+88%), as well as NIMESULIDE (+87%), which moved up one rank, showed high growth rates and rose in the ranks. At the same time, they displaced XYLOMETAZOLINE (+48%) and DIOSMIN*HESPERIDIN (+76%) down one rank, to numbers four and seven, respectively. INNs TEVA IBUPROFEN (+49%) and BISOPROLOL (+31%) moved down to ranks eight and nine, respectively. In total, ten INNs and group names accounted for 14.5% of the regional sales against 12% in the year-earlier period.

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

Rank in the top ten		INN/Grouping name	Share in total pharmacy sales, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	1	UMIFENOVIR	2.6	1.7
2	2	RIVAROXABAN	1.8	1.5
3	8	APIXABAN	1.7	1.0
4	3	XYLOMETAZOLINE	1.4	1.5
5	14	IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID	1.4	0.8
6	7	NIMESULIDE	1.2	1.1
7	6	DIOSMIN*HESPERIDIN	1.2	1.1
8	5	IBUPROFEN	1.1	1.2
9	4	BISOPROLOL	1.0	1.3
10	12	ROSUVASTATIN	1.0	0.8
Total			14.5	12.0

Half of the top 10 ATC groups in the regional market held their own in the ranking (Table 4). Among them was the leader of the top ten C09 Agents acting on the rennin-angiotenzin system (+60%). B01 Antithrombotic agents (+88%), G03 Sex hormones (+62%), R01 Nasal preparations (+66%) and A11 Vitamins (+41%) held their previous ranks three, five, eight and nine. Among the remaining ATC groups, three groups with a pronounced growth of rates rose in the ranks. In addition, J05 Antivirals for systemic use (2.5-fold growth) moved up to rank two from four, and N02 Analgesics (+89%) moved up to rank six from ten. The newcomer C05 Vasoprotectives (+53%) rounded out the top ten ranking. At the same time, M01 Anti-inflammatory and antirheumatic products (+57%) lost two rating points, and R01 Nasal preparations (+47%) - one rating point. The top ten ATC groups accumulated 43.1% of the regional pharmacy sales, 40.2% in the year-earlier period.

Table 4. The top ten ATC Groups by pharmacy sales

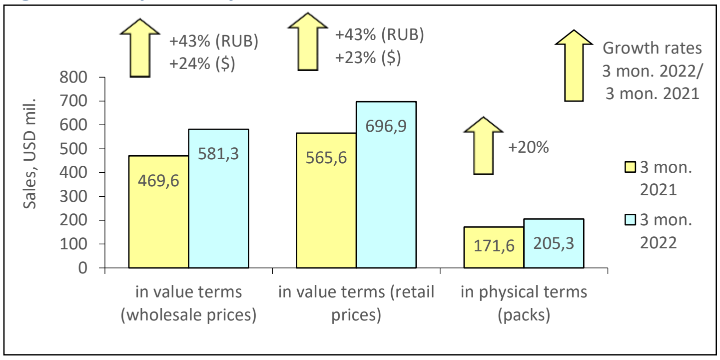
Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
3 mon. 2022	3 mon. 2021			3 mon. 2022	3 mon. 2021
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	6.4	6.5
2	4	J05	ANTIVIRALS FOR SYSTEMIC USE	6.3	4.1
3	3	B01	ANTITHROMBOTIC AGENTS	5.4	4.6
4	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.1	5.2
5	5	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.1	4.0
6	10	N02	ANALGESICS	3.5	3.0
7	6	R01	NASAL PREPARATIONS	3.4	3.7
8	8	R05	COUGH AND COLD PREPARATIONS	3.3	3.2
9	9	A11	VITAMINS	2.8	3.2
10	11	C05	VASOPROTECTIVES	2.6	2.8
Total				43.1	40.2

Conclusion. In January-March of 2022, the pharmacy market of the NWFD (exclusive of St Petersburg) brought in RUB 21.092 bil. (USD 243.277 mil.), which was 59% in terms of roubles and 37% in terms of dollars more than in the same period of 2021. In pack terms, the market also showed positive growth rates (+21%) and achieved 63.976 mil. packs. According to the results for the first quarter of 2022, the average cost of an FPP pack in the regional pharmacies was USD 3.80, Which was higher than the indicator of the same period of 2021 (USE 3.37) and average across the country (USD 3.74). The expenses of district residents for FPPs in the pharmacies were considerably lower than the national average (USD 17.50 vs. USD 31.33).

VFD PHARMACY MARKET: 2022 FIRST THREE MONTHS RESULTS

According to the Federal State Statistics Service, as of January 1, 2022, estimated population of the Volga Federal District (VFD) 28.844 mil., which accounted for 19.8% of the total Russian Federation population. According to Federal State Statistics Service's data, in the first quarter of 2022 the average salary in the VFD was RUB 42228 (USD 498.38), which was 30% lower than the national average salary throughout Russia (RUB 60101). According to the results of IQVIA Retail Audit of OTC drugs in Russian Federation™, the pharmacy market of VFD in pack terms expanded by 20% to 205.294 mil. packs for the first three months of 2022, as compared to the same period of the last year (Fig. 1). The sales in terms of wholesale prices increased by 43% in terms of roubles and 24% in terms of dollars and reached RUB 49.985 bil. (USD 581.262 mil.). A region's share in the total pharmacy sales in Russia accounted for 15.2%. Based on the results for January-March of 2022, the average cost of an FPP in the VFD pharmacies increased as compared with the year-earlier period (USD 3.30) and was equal to USD 3.39. The average per capita expenses for purchase of drugs in the pharmacies were estimated at USD 24.16.

Figure 1. VFD pharmacy market for 3 months of 2021 – 3 months of 2022



Following the results for the first quarter of 2022, the top ten drug manufacturers ranking on the retail Volga Federal District market didn't change in composition (Table 1). However, only its leaders (+54%) and BAYER (+48%) held their own in the ranking. Four manufacturers managed to move up to the higher rating positions. STADA (+49%), SERVIER (+57%) and SANDOZ (+32%) moved up one rank to numbers three, seven and nine. ABBOTT (+51%) moved up two ranks, coming in at number four. At the same time, KRKA (+36%), TEVA (+19%) and BERLIN-CHEMIE/MENARINI (+26%) lost one rank each, and SANOFI (+25%) moved two ranks down. The total share of the top 10 brands reduced from 32.3% to 31.7%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	1	OTCPHARM	4.7	4.3
2	2	**BAYER**	4.3	4.1
3	4	**STADA**	3.7	3.5
4	6	**ABBOTT**	3.1	2.9
5	3	**SANOFI**	3.1	3.6
6	5	**KRKA**	3.1	3.2
7	8	**SERVIER**	3.0	2.7
8	7	**TEVA**	2.4	2.9
9	10	**SANDOZ**	2.3	2.5
10	9	**BERLIN-CHEMIE/MENARINI**	2.2	2.5
Total			31.7	32.3

*AIPM members are in bold

Two newcomers broke into the ranks of the top ten ranking (Table 2). GRIPPFERON (2.6-fold growth in sales) and EDARBI (2.3-fold growth) moved up to ranks five and nine. The other three brands moved up to the higher ranks. Among them were the top ten leader ARBIDOL (2.8-fold growth), as well as INGAVIRIN (2.5-fold growth) and DETRALEX (+68%), which moved up to ranks four and eight. ELIQUIS (+90%), which retained its rank three, as well as XARELTO (+90%) and CONCOR (+46%), which moved down to ranks two and ten, also demonstrated outperforming growth rates. Not so dynamic HEPTRAL (+42%) and MEXIDOL (+29%) also moved down to the lower ranks six and seven, respectively. The total share of the top ten brands ranking increased by 2.5 p.p. and achieved 9.7%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	2	ARBIDOL	2.1	1.1
2	1	XARELTO	1.4	1.1
3	3	ELIQUIS	1.3	1.0
4	10	INGAVIRIN	0.9	0.5
5	17	GRIPPFERON	0.8	0.4
6	5	HEPTRAL	0.7	0.7
7	4	MEXIDOL	0.7	0.8
8	9	DETRALEX	0.6	0.5
9	22	EDARBI	0.6	0.4
10	8	CONCOR	0.6	0.6
Total			9.7	7.2

Following the respective brand, UMIFENOVIR, which sales increased by 3 times, became the leader of the top ten INNs and grouping names ranking (Table 3). Note that the markets of another six of the top ten INNs developed at a fast pace. And if IBUPROFEN (+51%) held and reinforced its rank nine, RIVAROXABAN (+73%), APIXABAN (+90%) and DIOSMIN* HESPERIDIN (+53%) moved up to ranks two, three and five, and INTERFERON ALFA-2B (2.2-fold growth) and IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID (2.5-fold growth) broke into the ranks of the top ten ranking, coming in at numbers six and ten. Growth in sales of INNs XYLOMETAZOLINE (+29%), PANCREATIN (+28%) and BISOPROLOL (+33%) lagged behind the market average, which resulted in the loss of three ranking positions. In total, the top ten INNs and group names accounted for 12.5% of the regional market vs 10.0% in the year-earlier period.

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

Rank in the top ten		INN/Grouping name	Share in total pharmacy sales, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	2	UMIFENOVIR	2.8	1.3
2	3	RIVAROXABAN	1.4	1.1
3	7	APIXABAN	1.3	1.0
4	1	XYLOMETAZOLINE	1.2	1.3
5	8	DIOSMIN*HESPERIDIN	1.0	1.0
6	17	INTERFERON ALFA-2B	1.0	0.6
7	4	PANCREATIN	1.0	1.1
8	5	BISOPROLOL	1.0	1.0
9	9	IBUPROFEN	1.0	0.9
10	25	IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID	0.9	0.5
Total			12.5	10.0

J05 Antivirals for systemic use, which sales increased by 2.4 times, became the most demanded and dynamic group in the top ten ATC groups ranking based on the results for the first three months of 2022 (Table 4). Due to lagging growth rates, the former leader C09 Agents acting on the renin-angiotensin system and M01 Anti-inflammatory and antirheumatic products (+39% each) moved down to ranks two and four, while B01 Antithrombotic agents (+58%) held their previous rank three. In addition to the leader, another three groups rose in the ranks. G03 Sex hormones (+51%) and R05 Cough and cold preparations (+63%) moved up to rank five and six. The group N02 Analgesics (+49%) moved up to rank eight from nine. J01 Antibacterials for systemic use (+22%), as well as R01 Nasal preparations (+36%) and N06 Psychoanaleptics (+37%), which showed relatively low growth rates, lost two rating points each and moved down to ranks seven and two last lines, respectively. In total, the top ten ATC groups accumulated 40.5% of the regional sales, which was 2.6 p.p. higher than the year-earlier period indicator (37.9%).

Table 4. The top ten ATC Groups by pharmacy sales

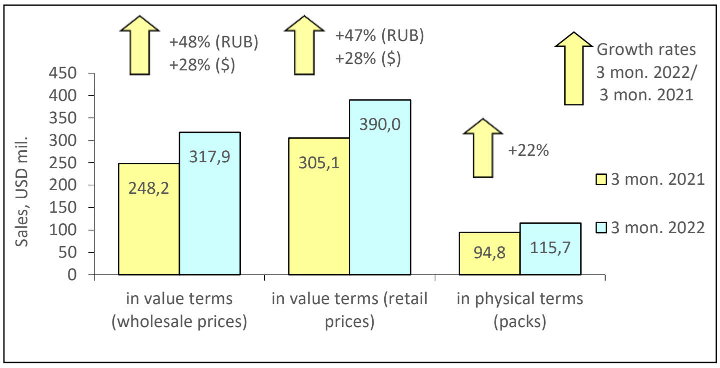
Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
3 mon. 2022	3 mon. 2021			3 mon. 2022	3 mon. 2021
1	4	J05	ANTIVIRALS FOR SYSTEMIC USE	6.3	3.8
2	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.6	5.8
3	3	B01	ANTITHROMBOTIC AGENTS	4.8	4.4
4	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.6	4.8
5	6	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.6	3.4
6	10	R05	COUGH AND COLD PREPARATIONS	3.3	2.9
7	5	J01	ANTIBACTERIALS FOR SYST USE	3.1	3.6
8	9	N02	ANALGESICS	3.1	3.0
9	7	R01	NASAL PREPARATIONS	3.0	3.2
10	8	N06	PSYCHOANALEPTICS	2.9	3.1
Total				40.5	37.9

Conclusion. Based on the results for the first quarter of 2022, the pharmacy market in VFD was estimated at RUB 49.985 bil. (USD 581.262 mil.) at retail prices. At the same time, the market behaviour was positive both in rouble (+43%) and dollar (+23%) terms. In natural terms, the sales increased by 20% to 205.294 mil. packs. The average cost of FPP pack based on the results for January-March of 2022 was USD 3.39, which was more than in the year-earlier period (USD 3.30), but lower than the national average (USD 3.74). Per capita expenses of the district residents for purchase of medicines in the pharmacies were also lower than the national average figures (USD 24.16 vs. USD 31.33).

SOUTHERN FEDERAL DISTRICT PHARMACY MARKET: 2022 FIRST THREE MONTHS RESULTS

According to the Federal State Statistics Service, as of January 1, 2022, estimated population of the Southern Federal District (SoFD) was 16.435 mil., which accounted for 11.3% of the total Russian Federation population. According to Federal State Statistics Service's data, in 1 Q 2022 the average salary in the SFD was RUB 40860 (USD 482.24), which was 32% lower than the national average salary throughout Russia (RUB 60101). According to the results of IQVIA Retail Audit of OTC drugs in Russian Federation™, in the first quarter of 2022 the sales of drugs in natural terms (+22%) increased to 115.650 mil. packs. In money terms, the market also showed positive growth rates both in rouble (+48%) and in dollar terms (+28%) and reached RUB 27.238 bil. (USD 248.196 mil.) in wholesale prices (Fig. 1). The city market share accounted for 8.5% of the pharmacy sales in Russia. Based on the results for the first three months of 2022, the average cost of a finished pharma product (FPP) pack was USD 3.37 at retail prices vs. USD 3.22 in a year-earlier period. In the analysed period, the average amount spent by residents of the SoFD for drugs amounted to USD 23.73.

Figure 1. The SoFD pharmacy market for 3 months of 2021 – 3 months of 2022.*



The Russian OTCPHARM (+81%) moved up to rank one in the top ten manufacturers ranking in the market of the Southern Federal District based on the results for 2021, displacing BAYER (+43%) to rank two (Table 1). STADA (+66%) and SERVIER (+61%) moved up to ranks three and four from the lower ones. Two more companies, SANDOZ (+45%) and GLAXOSMITHKLINE (+48%), improved their ranking positions, moving one rank up to numbers eight and nine. Three lagging manufacturers, SANOFI (+36%), BERLIN-CHEMIE/MENARINI (+35%) and TEVA (+15%), on the contrary, moved down to ranks six, seven and ten, respectively. As before, ABBOTT (+45%) held its previous rank five. In total, the top ten manufacturers accounted for 33.1% of the Russian market, whereas in the year– earlier period they had accounted for 32.8%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	2	OTCPHARM	5.2	4.2
2	1	**BAYER**	4.6	4.8
3	4	**STADA**	3.7	3.3
4	7	**SERVIER**	3.3	3.1
5	5	**ABBOTT**	3.2	3.3
6	3	**SANOFI**	3.2	3.5
7	6	**BERLIN-CHEMIE/MENARINI**	2.8	3.1
8	9	**SANDOZ**	2.5	2.6
9	10	**GLAXOSMITHKLINE**	2.2	2.2
10	8	**TEVA**	2.2	2.8
Total			33.1	32.8

*AIPM members are in bold

None of the top ten brands managed to hold their own in the ranking (Table 2). At the same time, six of them rose in the ranks. The leader of the rating changed: ARBIDOL moved up to rank one from three, increasing its sales by 3.2 times. INGAVIRIN (2.4-fold growth) also moved two ranks up. The newcomers of the top ten brands ranking GRIPPFERON (2.8-fold growth), THERAFLU (+81%), CARDIOMAGNYL (2-fold growth) and CONCOR (+65%) moved up to the last four ranks. At the same time, the brands ELIQUIS (+72%), XARELTO (+60%) and DETRALEX (+47%) lost one rating point each despite the outperforming sales. HEPTRAL (+31%) moved one rank down. The top ten brands accumulated 11% of the regional market, whereas in the year-earlier period their share was 8.2%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	3	ARBIDOL	2.8	1.3
2	1	ELIQUIS	1.8	1.6
3	2	XARELTO	1.5	1.3
4	6	INGAVIRIN	1.0	0.6
5	4	HEPTRAL	0.7	0.8
6	5	DETRALEX	0.7	0.7
7	26	GRIPPFERON	0.7	0.4
8	14	THERAFLU	0.6	0.5
9	17	CARDIOMAGNYL	0.6	0.4
10	12	CONCOR	0.6	0.5
Total			11.0	8.2

Two newcomers broke into the ranks of the top ten INN and grouping names ranking. INTERFERON ALFA-2B and IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID (2.4-fold growth in sales in both) moved up to ranks six and nine, respectively. In addition to them, only one more name demonstrated the rating progress, UMIFENOVIR (3.2-fold growth), which became the leader of the rating. XYLOMETAZOLINE (+36%) that had previously topped the ranking moved down to rank three. INNs APIXABAN (+72%), RIVAROXABAN (+60%), PANCREATIN (+27%), NIMESULIDE (+56%) and IBUPROFEN (+62%) held their previous ranks two, four, five, seven and ten respectively. The composition DIOSMIN*HESPERIDIN (+42%) moved down from rank six to eight. The total share of the top-ten increased by 2.6 p.p. and achieved 14%.

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

Rank in the top ten		INN/Grouping name	Share in total pharmacy sales, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	3	UMIFENOVIR	3.1	1.4
2	2	APIXABAN	1.8	1.6
3	1	XYLOMETAZOLINE	1.5	1.7
4	4	RIVAROXABAN	1.5	1.3
5	5	PANCREATIN	1.1	1.3
6	17	INTERFERON ALFA-2B	1.1	0.6
7	7	NIMESULIDE	1.0	1.0
8	6	DIOSMIN*HESPERIDIN	1.0	1.1
9	19	IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID	1.0	0.6
10	10	IBUPROFEN	0.9	0.8
Total			14.0	11.4

The largest sales volumes in the region's market and their highest growth were demonstrated by the group J05 Antivirals for systemic use (2.4-fold growth), which moved up to rank one from five (Table 4). The last year leader B01 Antithrombotic agents (+20%) moved down to rank two. C09 Agents acting on the rennin-angiotensin system (+61%) and M01 Anti-inflammatory and antirheumatic products (+46%) continued to hold ranks three and four. R01 Nasal preparations (+46%), G03 Sex hormones (+61%) and R05 Cold and cough preparations (+71%) moved up to ranks five through seven from the lower positions. L03 Immunostimulants (+76%), which broke into the top ten ranking for the first time, moving up to rank ten, also demonstrated the rating progress. The groups J01 Antibacterials for systemic use (+1%) and N02 Analgesics (+48%) moved down to the lower ranks eight and nine. The total share of the top 10 increased from 38.5% to 41.5%.

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. 2022	3 mon. 2021			3 mon. 2022	3 mon. 2021
1	5	J05	ANTIVIRALS FOR SYSTEMIC USE	7.2	4.4
2	1	B01	ANTITHROMBOTIC AGENTS	5.4	5.3
3	3	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.1	4.6
4	4	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.5	4.6
5	6	R01	NASAL PREPARATIONS	3.4	3.4
6	8	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.3	3.0
7	10	R05	COUGH AND COLD PREPARATIONS	3.2	2.8
8	2	J01	ANTIBACTERIALS FOR SYST USE	3.2	4.6
9	7	N02	ANALGESICS	3.1	3.1
10	12	L03	IMMUNOSTIMULANTS	3.1	2.6
Итого				41.5	38.5

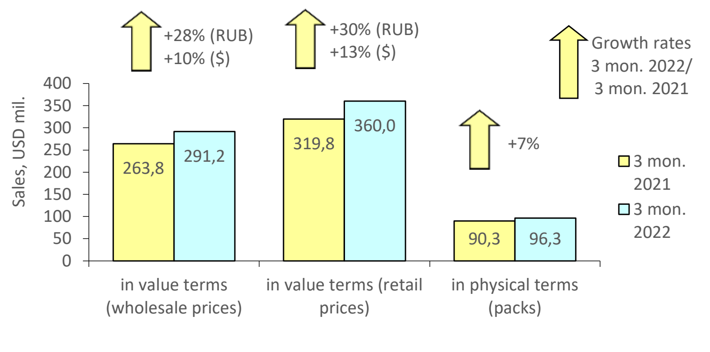
Conclusion. On the basis of the results for the first three months of 2022, the pharmacy market of SoFD reached RUB 33.436 bil. (USD 389.966 mil.) at retail prices. At the same time, the sales increased by 47% in terms of roubles and 28% in terms of dollars. In pack terms, the market expanded by 22%, and its volume amounted to 115.650 mil. packs. Based on the results for January-March of the current year, the average cost of an FPP pack in the pharmacies of the region amounted to USD 3.37, which was more than in the previous year (USD 3.22), but lower than the national average (USD 3.74). In the analysed period, the average expenses of the SoFD residents for FPPs in the pharmacies were also lower than the national average (USD 23.73 vs. USD 31.33).

* Here and elsewhere IQVIA's data we used

UFD PHARMACY MARKET: 2022 FIRST THREE MONTHS RESULTS

According to Federal State Statistics Service, as of January 1, 2022, estimated population of the Ural Federal District (UFD) was 12.295 mil., which accounted for 8.4% of the total Russian Federation population. According to Federal State Statistics Service's data, in 1 Q 2022 the average salary in the UFD was RUB 61,793 (USD 729.29), which was 3% higher than the average wage in Russia (RUB 60,101). According to the results of IQVIA Retail Audit of Finished Pharma Products (FPP) in Russian Federation™, at the end of the first three months 2022 the sales of FPP drugs in physical terms in the pharmacies of UFD saw a 7% expanded to 96.290 mil. packs. In money terms, the market also showed the positive growth rates: it increased by 28% in rouble terms and by 10% in dollar terms and reached 25.071 billion roubles (USD 291.230 million) in wholesale prices (Fig. 1). The regional retail sales share accounted for 7.9% of all pharmacy sales in Russia. The average retail cost of an FPP pack was USD 3.74 in January-March 2022 against USD 3.54 in the year-earlier period. For the first three months of 2022, the average amount spent by residents of UFD for medications amounted to USD 29.28.

Figure 1. The UFD pharmacy market for 3 months of 2021 – 3 months of 2022.*



Based on the results for January-March 2022, most of the top ten manufacturers on the pharmacy market of the Ural Federal District (UFD) showed outstripping growth rates (Table 1). On top of that, three of them showed progress in the ranks. OTCPHARM (+43%) moved up to rank number one of the top ten ranking, and SERVIER (+41%) and GLAXOSMITHKLINE (+44%) moved up to ranks five and ten. STADA (+37%) and ABBOTT (+32%) maintained and strengthened their previous positions, while BAYER (+34%) lost one rating point despite outperforming growth rates. The less dynamic TEVA (+5%) and KRKA (+17%) lost two positions each and moved down to ranks seven and nine, respectively. Despite lagging growth rates, SANOFI (+8%) continued to hold rank four, while GEDEON RICHTER (+22%) moved up one rank to number eight. The cumulative share of the top 10 manufacturers didn't virtually change and accounted for 33.1%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	2	OTCPHARM	4.8	4.3
2	1	**BAYER**	4.6	4.4
3	3	**STADA**	4.1	3.8
4	4	**SANOFI**	3.1	3.7
5	8	**SERVIER**	3.1	2.8
6	6	**ABBOTT**	3.1	3.0
7	5	**TEVA**	2.7	3.3
8	9	GEDEON RICHTER	2.6	2.8
9	7	**KRKA**	2.6	2.8
10	13	**GLAXOSMITHKLINE**	2.4	2.1
Total			33.1	33.0

*AIPM members are in bold

The dominant three brands held their own in the top ten brands rating (Table 2). Those were antiviral ARBIDOL (2.3-fold growth in sales) and antithrombotic agents XARELTO (+60%) and ELIQUIS (+80%). DETRALEX (+52%) also held its previous rank five. Four from the remaining brand names of the top ten rose in the ranks. INGAVIRIN (2.3-fold growth) moved up to rank four from nine (2.3-fold growth), while the newcomers FEMOSTON and THERAFLU (2.1-fold growth in sales in both), which broke into the top 10 ranking, moved up to ranks six and the last two lines. In contrast, the less dynamic HEPTRAL (+12%) and NUROFEN (+36%) moved down to ranks seven and eight. The total share of the top ten was 8.7%, in the year-earlier period it was 6.2%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	1	ARBIDOL	1.9	1.1
2	2	XARELTO	1.2	1.0
3	3	ELIQUIS	1.1	0.8
4	9	INGAVIRIN	0.9	0.5
5	5	DETRALEX	0.7	0.6
6	19	GRIPPFERON	0.6	0.4
7	4	HEPTRAL	0.6	0.7
8	6	NUROFEN	0.6	0.6
9	25	FEMOSTON	0.6	0.3
10	30	THERAFLU	0.5	0.3
Total			8.7	6.2

UMIFENOVIR, which sales increased 2.5 times, moved up to rank number one from two in the top ten INNs and generic names ranking (Table 3). XYLOMETAZOLINE (+24%), which had held that rank earlier, moved down to rank two. Next came RIVAROXABAN (+60%), which moved up from rank five. The newcomers APIXABAN (+80%), IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID (2.3-fold growth) and INTERFERON ALFA-2B (+92%), which broke into the top 10 ranking for the first time, also moved up to the higher ranks. In contrast, PANCREATIN (+13%) and ROSUVASTATIN (+38%) moved down to the lower ranks seven and eight. DIOSMIN*HESPERIDIN (+47%) and IBUPROFEN (+34%) held their previous ranks four and six. The cumulative share of the top 10 increased from 9.4% to 11.8%.

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

Rank in the top ten		INN/Grouping name	Share in total pharmacy sales, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	2	UMIFENOVIR	2.3	1.2
2	1	XYLOMETAZOLINE	1.4	1.5
3	5	RIVAROXABAN	1.2	1.0
4	4	DIOSMIN*HESPERIDIN	1.2	1.1
5	13	APIXABAN	1.1	0.8
6	6	IBUPROFEN	1.0	1.0
7	3	PANCREATIN	1.0	1.1
8	7	ROSUVASTATIN	1.0	0.9
9	28	IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID	0.9	0.5
10	20	INTERFERON ALFA-2B	0.8	0.6
Total			11.8	9.4

J01 Antibacterials for systemic use (2-fold growth in sales) moved up to rank number one from five in the top ten ATC groups ranking (Table 4). It displaced the former top three groups C09 Agents acting on the rennin-angiotensin system (+21%), M01 Anti-inflammatory and antirheumatic products (+26%) and G03 Sex hormones (+38%) one rank down. Apart from the leader, another three ATC groups managed to rise in the ranks. B01 Antithrombotic agents (+48%) and N02 Analgesics (+35%) moved one rank up to numbers five and eight, while the only newcomer of the top ten ranking, R05 Cough and cold preparations, moved up to rank seven (+48%). On the contrary, R01 Nasal preparations and A11 Vitamins, which showed an 18% increase in sales, moved down to ranks six and nine. As before, N06 Psychoanaleptics (+27%) held its rank ten in the top ten ranking. In total, the top ten ATC groups accumulated 39.6% of the regional market, whereas in the year-earlier period they accounted for 36.9%.

Table 4. The top ten ATC Groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
3 mon. 2022	3 mon. 2021			3 mon. 2022	3 mon. 2021
1	5	J05	ANTIVIRALS FOR SYSTEMIC USE	5.7	3.6
2	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.1	5.4
3	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.7	4.8
4	3	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.3	4.0
5	6	B01	ANTITHROMBOTIC AGENTS	4.2	3.6
6	4	R01	NASAL PREPARATIONS	3.4	3.7
7	11	R05	COUGH AND COLD PREPARATIONS	3.3	2.8
8	9	N02	ANALGESICS	3.2	3.0
9	8	A11	VITAMINS	2.9	3.1
10	10	N06	PSYCHOANALEPTICS	2.8	2.9
Total				39.6	36.9

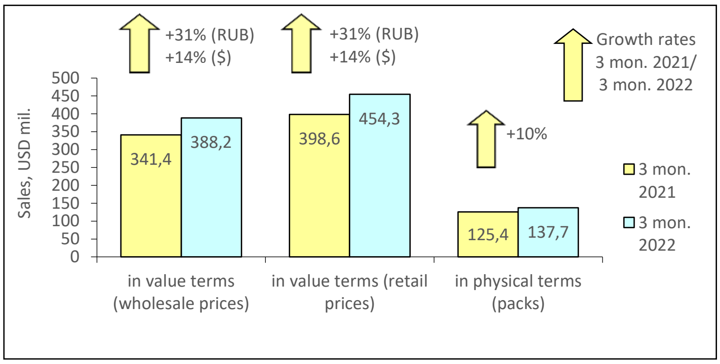
Conclusion. On the basis of the results for the first quarter of 2021, the retail pharmacy market of the Ural Federal District brought in RUB 30.983 bil. (USD 360.012 bil.) at retail prices. The regional volume increased by 30% in terms of roubles, and 13% in terms of dollars. In pack terms, the market extended by 7% and amounted to 96.290 mil. packs. The average cost of FPP pack in the district pharmacies based on the results for the first quarter of 2022 was USD 3.74, which was higher than the last year figures (USD 3.54) and equalled to the national average (USD 3.74). The average expenses of the UFD residents for medications in the pharmacies were lower than the national average (USD 29.28 vs. USD 31.33).

* Here and elsewhere IQVIA's data are used

SiFD PHARMACY MARKET: 2022 FIRST THREE MONTHS RESULTS

According to Federal State Statistics Service, as of January 1, 2022, estimated population of the Siberian Federal District (SiFD. 16.889 mil., which accounted for 11.6% of the total Russian Federation population. According to Federal State Statistics Service's data, in January-March 2022, the average salary in the SiFD was RUB 51,539 (USD 608.27), which was 14% more than the average salary in Russia (RUB 60,101). According to the results of IQVIA Retail Audit of FPP drugs in Russian Federation™, in January - March of 2022 the SiFD pharmacy market volume in physical terms extended by 10% to 137.684 mil. packs (Fig. 1) The sales in wholesale prices increased by 31% in terms of roubles and 14% in terms of dollars, reaching RUB 33.253 bil. (USD 388.157 mil.). The district's share accounted for 9.9% of the total pharmacy sales in the Russian pharmacy market pattern. Based on the results for three months of 2022, the average cost of a FPP pack in the SiFD pharmacies was USD 3.30, whereas in the year-earlier period its cost was USD 3.18. In the analysed period, per capita expenses of the SiFD residents for purchase of medicines in pharmacies amounted to USD 26.90.

Figure 1. The SiFD pharmacy market for 3 months of 2021 – 3 months of 2022.*



In the first quarter of 2022, most of the top ten manufacturers on the pharmacy market of the Siberian Federal District (SiFD) showed outstripping growth rates (Table 1). Thus, due to a 52% increase in sales, Russian OTCPHARM headed the top ten ranking, displacing BAYER (+33%) down one rank. STADA (+37%) held and reinforced its previous rank three. KRKA (+36%) and ABBOTT (+44%) moved two ranks up to numbers four and seven. At the same time, they displaced SANOFI (+14%), SERVIER (+32%), TEVA (+19%) and SANDOZ (+22%) one rank down. The newcomer GLAXOSMITHKLINE (+41%) rounded out the top ten ranking. The total share of the top 10 drug manufacturers expanded by 0.5 p.p. to 34.1%

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	2	OTCPHARM	4.6	4.0
2	1	**BAYER**	4.5	4.5
3	3	**STADA**	4.1	3.9
4	6	**KRKA**	3.3	3.2
5	4	**SANOFI**	3.3	3.8
6	5	**SERVIER**	3.2	3.2
7	9	**ABBOTT**	3.1	2.8
8	7	**TEVA**	2.8	3.1
9	8	**SANDOZ**	2.6	2.8
10	13	**GLAXOSMITHKLINE**	2.5	2.3
Total			34.1	33.6

*AIPM members are in bold

Three newcomers broke into the ranks of the top ten brands ranking (Table 2). INGAVIRIN (2.5-fold growth in sales), THERAFLU (+83%) and FEMOSTON (2.1-fold growth) moved up to ranks four, seven and ten, respectively. The top three brands also showed high growth rates: ARBIDOL (2.6-fold growth), ELIQUIS (2.2-fold growth) and XARELTO (+87%), which due to this held and reinforced its positions. The remaining brands also showed outstripping growth rates. But if the brand HEPTRAL (+46%) improved its positions by one rank, and LORISTA (+45%) held its previous rank five, DETRALEX and CARDIOMAGNYL (+40% each) lost one rank each. In total, the top ten manufacturers accumulated 9.6% of pharmacy sales vs 6.6% 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. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	1	ARBIDOL	1.9	1.0
2	2	ELIQUIS	1.4	0.9
3	3	XARELTO	1.2	0.8
4	14	INGAVIRIN	0.9	0.5
5	5	LORISTA	0.8	0.7
6	4	DETRALEX	0.8	0.7
7	12	THERAFLU	0.7	0.5
8	9	HEPTRAL	0.6	0.6
9	8	CARDIOMAGNYL	0.6	0.6
10	22	FEMOSTON	0.6	0.4
Total			9.6	6.6

UMIFENOVIR (2.7-fold growth in sales) and APIXABAN (2.2-fold growth) moved up to the first positions in the top ten INNs and grouping names ranking, displacing the former leader XYLOMETAZOLINE (+19%) down to rank three (Table 3). In addition to them, another two brands from the top ten ranking rose in the ranks. RIVAROXABAN (+87%) moved up from rank ten to four, and the newcomer IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID (2.5-fold growth), which broke into the top 10 ranking for the first time, moved up to rank eight. At the same time, they displaced the composition DIOSMIN*HESPERIDIN (+38%) and INNs BISOPROLOL (+23%), IBUPROFEN (+29%) and PANCREATIN (+28%) to the lower ranks, from five through seven and ten. INN NIMESULIDE (+35%) kept its previous rank nine. The total share of the top-10 INNs increased by more than 2 p.p. to 11.9%.

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

Rank in the top ten		INN/Grouping name	Share in total pharmacy sales, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	3	UMIFENOVIR	2.2	1.1
2	8	APIXABAN	1.4	0.9
3	1	XYLOMETAZOLINE	1.4	1.5
4	10	RIVAROXABAN	1.2	0.8
5	4	DIOSMIN*HESPERIDIN	1.1	1.0
6	2	BISOPROLOL	1.0	1.1
7	5	IBUPROFEN	1.0	1.0
8	33	IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID	0.9	0.5
9	9	NIMESULIDE	0.9	0.9
10	7	PANCREATIN	0.9	0.9
Total			11.9	9.6

Four of the top-10 ATC groups held their own in the ranking (Table 4). Among them were the top ten leader C09 Agents acting on the renin-angiotensin system (+30%), as well as B01 Antithrombotic agents (+66%), N02 Analgesics (+39%) and A11 Vitamins (+19%) holding ranks four, six and nine. Three groups rose in the ranks. J05 Antivirals for systemic use (2.2-fold growth in sales) moved up to rank two from seven, R05 Cough and cold preparations (+47%) moved up to rank seven from ten, and the newcomer N06 Psychoanaleptics (+27%) that broke into the top ten ranking for the first time, moved up to rank ten. M01 Anti-inflammatory and antirheumatic drugs (+27%), which showed the same growth rates, moved one rank down, while the more dynamic G03 Sex hormones (+36%) lost two ranks, moving down to ranks three and five, respectively. The less dynamic group R01 Nasal preparations (+20%) moved down from rank five to eight. The commutative share of the top ten ATC groups expanded from 36.7% to 39.6%.

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. 2022	3 mon. 2021			3 mon. 2022	3 mon. 2021
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.5	5.5
2	7	J05	ANTIVIRALS FOR SYSTEMIC USE	5.2	3.1
3	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.8	4.9
4	4	B01	ANTITHROMBOTIC AGENTS	4.6	3.6
5	3	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.2	4.1
6	6	N02	ANALGESICS	3.5	3.3
7	10	R05	COUGH AND COLD PREPARATIONS	3.3	2.9
8	5	R01	NASAL PREPARATIONS	3.3	3.6
9	9	A11	VITAMINS	2.6	2.9
10	11	N06	PSYCHOANALEPTICS	2.6	2.7
Total				39.6	36.7

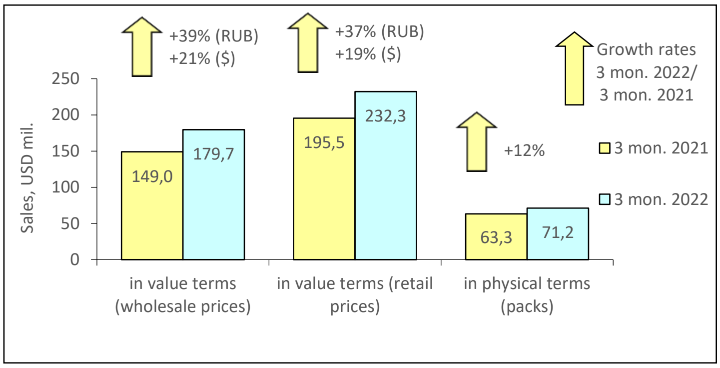
Conclusion. At the end of the first three months of 2022, the pharmacy market in the Siberian Federal District was estimated at RUB 38.905 bil. (USD 454.277 mil.) at final consumer prices. At the same time, the market behaviour was positive both in rouble (+31%) and in dollar (+14%) terms. In physical terms, the sales increased by 10% and amounted to 137.684 mil. packs. The average cost of an FPP pack increased as compared to a year earlier (USD 3.18 vs. USD 3.30) but continued to be lower than the national FPP price average in Russia (USD 3.74). Per capita expenses of the district residents for purchase of medicines in the pharmacies were also lower than the national average figures (USD 26.90 vs. USD 31.33).

* Here and elsewhere IQVIA's data are used

FEFD PHARMACY MARKET: 2022 FIRST THREE MONTHS RESULTS

According to Federal State Statistics Service, as of January 1, 2022, estimated population of the Far Eastern Federal District (FEFD) was 8.091 mil., which accounted for 5.6% of the total Russian Federation population. According to Federal State Statistics Service's data, based on the results for the first quarter of 2022 the average wage in the FEFD was RUB 67032 (USD 791.12), which was 12% higher than the average wage in Russia (RUB 60,101). According to the results of IQVIA Retail Audit of Finished Pharma Products (FPP) in Russian Federation™, at the end of the first quarter of 2022 the sales of drugs in physical terms in the pharmacies of the FEFD saw a 12% increase to 71.214 mil. packs. In money terms, the market expanded by 39% in terms of roubles, and 21% in terms of dollars. At the same time, the volume of the market amounted to RUB 15.419 bil. (USD (179.685 mil.) at wholesale prices (Fig. 1). The district's share accounted for 5.1% of the all-Russia sales in retail prices. The average cost of a pack increased as compared to a year earlier period (USD 3.37) and was equal to USD 3.80. The average amount spent by residents of FEFD on drugs in the pharmacies amounted to USD 28.71 for the first three months of 2022.

Figure 1. The FEFD pharmacy market for 3 months of 2021 – 3 months of 2022.*



OTCPHARM, which increased sales by 86% and moved up to rank number one in the top ten ranking from rank two became the most dynamic manufacturer in the retail market of the Far Eastern Federal District in the first quarter of 2022 (Table 1). At the same time, it displaced BAYER (+29%) one rank down. In addition to the leader, another two manufacturers rose in the ranks. SANDOZ (+33%) and GLAXOSMITHKLINE (+55%) moved up to ranks seven and eight. Note that the latter became the only newcomer of the top-10 ranking. At the same time, TEVA (+22%) and GEDEON RICHTER (+20%) moved down to the last ranks of the top ten ranking. STADA (+41%), KRKA (+31%), SANOFI (+30%) and SERVIER (+33%) held their previous ranks three through six, respectively. The total share of the top-10 ranking remained unchanged and amounted to 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. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	2	OTCPHARM	5.8	4.3
2	1	**BAYER**	4.6	5.0
3	3	**STADA**	4.1	4.1
4	4	**KRKA**	3.1	3.4
5	5	**SANOFI**	3.1	3.3
6	6	**SERVIER**	3.0	3.2
7	9	**SANDOZ**	2.8	3.0
8	12	**GLAXOSMITHKLINE**	2.8	2.5
9	7	**TEVA**	2.8	3.1
10	8	GEDEON RICHTER	2.7	3.1
Total			34.9	34.9

*AIPM members are in bold

Four of the top ten brands held their own in the ranking (Table 2). ARBIDOL (3.1-fold growth in sales), XARELTO (+61%) and ELIQUIS (+85%) retained their top ranks, as well as CARDIOMAGNYL (+43%) kept its previous rank seven. Three brands INGAVIRIN (2.5-fold growth), THERAFLU (2.1-fold growth) and GRIPPFERON (2.3-fold growth) managed to move up to the higher positions. However, all of them broke into the ranks of the top ten for the first time. At the same time, three brands with not so high growth rates, on the contrary, fell in the ranks: NUROFEN (+44%), DETRALEX (+39%) and CONCOR (+33%) lost two points each. The aggregate share of the top-10 expended from 7.8% to 11.1%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	1	ARBIDOL	3.3	1.5
2	2	XARELTO	1.3	1.1
3	3	ELIQUIS	1.2	0.9
4	12	INGAVIRIN	1.0	0.6
5	11	THERAFLU	0.9	0.6
6	4	NUROFEN	0.8	0.8
7	7	CARDIOMAGNYL	0.7	0.7
8	6	DETRALEX	0.7	0.7
9	29	GRIPPFERON	0.6	0.4
10	8	CONCOR	0.6	0.6
Total			11.1	7.8

UMIFENOVIR, which showed a threefold increase in sales, moved up to rank number one in the top ten INNs and grouping names ranking (Table 3). The market of another four INNs from the top ten ranking developed at a fast pace. RIVAROXABAN (+61%) and APIXABAN (+85%) moved up to ranks three and five, while the newcomers IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID (2.5-fold growth) and INTERFERON ALFA-2B (2.1-fold growth) moved up to ranks six and seven. Almost all the remaining INNs showed growth rates below the market average. Among them were the last year's leader XYLOMETAZOLINE (+28%), as well as BISOPROLOL (+29%), DIOSMIN*HESPERIDIN (+35%) and PANCREATIN (+30%) that moved down to the last three ranks. IBUPROFEN lost one rating point despite a 39% increase in sales, being displaced by more dynamic INNs from the top ten ranking. The aggregate share of the top-10 expended from 10.7% to 13.5%

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

Rank in the top ten		INN/Grouping name	Share in total pharmacy sales, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	2	UMIFENOVIR	3.5	1.6
2	1	XYLOMETAZOLINE	1.6	1.7
3	4	RIVAROXABAN	1.3	1.1
4	3	IBUPROFEN	1.2	1.2
5	8	APIXABAN	1.2	0.9
6	22	IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID	1.0	0.6
7	19	INTERFERON ALFA-2B	1.0	0.7
8	5	BISOPROLOL	0.9	1.0
9	6	DIOSMIN*HESPERIDIN	0.9	1.0
10	7	PANCREATIN	0.9	0.9
Total			13.5	10.7

J05 Antivirals for systemic use, which sales grew 2.5 times, became the best-selling and dynamic group in the regional market (Table 4). It displaced the former top three leaders: C09 Agents acting on the rennin-angiotensin system (+35%), M01 Anti-inflammatory and antirheumatic products (+38%) and B01 Antithrombotic agents (+52%). In addition to the leader, two more groups were able to rise in the ranks. R05 Cough and cold preparations (+89%) moved up to rank seven, and L03 Immunostimulants (+71%) broke into the top ten for the first time, moving up to rank nine. At the same time, R01 Nasal preparations (+33%) and J01 Antibacterials for systemic use (+28%) moved down to ranks six and ten, due to lagging growth rates. The groups G03 Sex hormones (+40%) and N02 Analgesics (+55%) held their previous ranks five and eight. The total share of the analysed ranking accounted for 41.6% against 36.9% 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. 2022	3 mon. 2021			3 mon. 2022	3 mon. 2021
1	6	J05	ANTIVIRALS FOR SYSTEMIC USE	6.9	3.8
2	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	4.9	5.0
3	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.7	4.7
4	3	B01	ANTITHROMBOTIC AGENTS	4.3	3.9
5	5	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.8	3.8
6	4	R01	NASAL PREPARATIONS	3.7	3.9
7	10	R05	COUGH AND COLD PREPARATIONS	3.6	2.7
8	8	N02	ANALGESICS	3.5	3.1
9	11	L03	IMMUNOSTIMULANTS	3.2	2.6
10	7	J01	ANTIBACTERIALS FOR SYST USE	3.1	3.3
Total				41.6	36.9

Conclusion. In January-March 2022, the retail market of the Far Eastern Federal District brought in RUB 19.939 bil. (USD 232.338 mil.), which was 37% in terms of roubles and 19% in terms of dollars more than in the same period of 2021. In pack terms, the market expanded by 12% and amounted to 71.214 mil. packs. The average cost of OTC pack in the FEFD pharmacies according to the results for the first three months of 2014 was USD 3.26, which was higher than the 2021 figure (USE 3.09), but less than the average across the country (USD 3.74). The average drug expenses of the district residents were also lower than the national average expenses in Russia (28.71 USD vs. 31.33 USD).

* Here and elsewhere IQVIA's data are used