JOINT PUBLICATION
OF THE ASSOCIATION OF INTERNATIONAL PHARMACEUTICAL MANUFACTURERS IN RUSSIA AND REMEDIUM GROUP

РЕМЕДИУМ
ГРУППА КОМПАНИЙ

AIPM®
Association of International Pharmaceutical Manufacturers
Ассоциация международных фармацевтических производителей

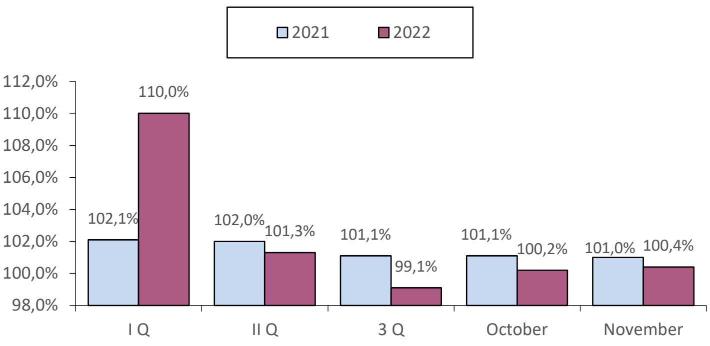
MACROECONOMIC INDICES

Inflation

According to Federal State Statistics Service's data, the Consumer Price Index was estimated as 100.4% in November 2022 compared to the previous month, 111.1% compared to December 2021.

In November 2022, the Producer Price Index for industrial production was 99.6% compared to the previous month and 97.5% in the month-earlier period. The index accounted for 97.5% as against December 2021.

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



Source: Rosstat

Living standard

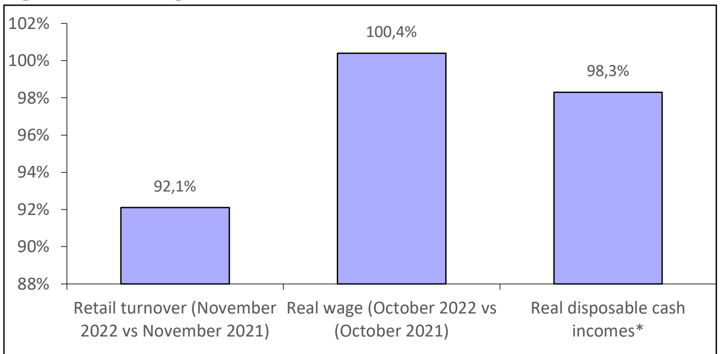
In October 2022, a gross monthly average wage of corporate employees reached RUB 62470 (USD 1026.45). It accounted for 113.1% compared to October 2021, and 100.7% compared to the previous period. In October 2022, the real gross wage accounted for 100.4% as compared to October 2021, and 100.5% against the prior period.

According to estimates[1], real disposable cash incomes accounted for 98.3% in January-September of 2022 as compared to January-September of 2021 (Fig. 2).

Retail turnover

In November 2022, the retail turnover was equal to RUB 3578.2 bil. or 92.1% (in comparable prices) against the respective period of the previous year, and RUB 38311.4 bil. or 93.8% in January - November 2022 (Fig. 2).

Figure 2. Real wage and retail turnover



Source: Rosstat

* January-September 2022 vs. January-September 2021.

Industrial Production

According to Federal State Statistics Service's data, in November 2022 Industrial Production Index accounted for 98.2% compared to the same period of the previous year and 99.9% in January-November 2022.

According to Federal State Statistics Service's data, Industrial Production Index for drugs and medical products accounted for 85.2% in November 2022 compared to the same period of 2021, and 114.3% in January-November 2022 vs January-November 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 November 2022.

Table 1. Top ten Russian chemical and pharmaceutical manufacturers by sales volume in November 2022

Rank	Manufacturer	RUB mil.
1	Otcpharm	3181.2
2	Stada	3149.2
3	Biocad	2787.6
4	Binnopharm	2455.5
5	Pharmstandart	2096.6
6	Servier	1926.6
7	Grotex	1900.6
8	Valenta	1866.1
9	Vertex	1591.3
10	Microgen	1544.4

Source: IQVIA

Table 2 provides pharmacy sales data from 10 regions of the Russian Federation. In October 2022 compared to September 2022, reduction in sales (in terms of roubles) was observed almost in all regions. The most pronounced reduction in sales was observed in St. Petersburg and Krasnodar Krai (-15%), the least one in Krasnoyarsk Krai (-6%). The sales in Perm increased by 1%.

Table 2. Pharmacy sales in the regions, 2022

Region	Pharmacy sales, $ mil. (Wholesale prices)			Growth gain, % (roubles)		
	August 2022	September 2022	October 2022	August/July 22	September/ August 22	October/September 22
Moscow	200.2	259.3	237.3	17%	28%	-7%
St. Petersburg	86.7	119.3	100.1	16%	36%	-15%
Krasnodar Krai	83.7	81.6	68.0	20%	-3%	-15%
Krasnoyarsk Krai	33.5	37.2	34.4	16%	10%	-6%
Tatarstan	32.2	39.2	35.1	10%	20%	-9%
Rostov Region	39.1	44.1	39.7	21%	12%	-8%
Novosibirsk Region	31.5	38.2	33.5	15%	20%	-11%
Voronezh Region	23.7	29.5	24.9	15%	23%	-14%
Perm	9.5	11.7	11.6	-2%	22%	1%
Tyumen	12.3	14.4	13.1	12%	15%	-7%

Advertising

The largest advertisers and pharmaceutical brand names highly publicized in mass media (TV, radio, press, outdoor advertising) are shown in Tables 3 & 4.

Table 3. Top five advertisers in mass media in November 2022

Rank	Company*	Amount of broadcasts
1	Materia Medica	7,385
2	Binnopharm Group	5,810
3	Otcpharm	5,087
4	Stada	4,776
5	Renewal Production Pharma Company	4,365

Source - Remedium according to Mediascope's data

Table 4. Top five brands in mass media in November, 2022

Rank	Brand*	Amount of broadcasts
1	Renewal	4,365
2	Evalar	4,078
3	Rengalin	2,587
4	Trekrezan	2,198
5	Tantum	1,865

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: 2022 FIRST NINE MONTHS RESULTS

According to DLO in RF™, the drugs supply under the Federal Program amounted to RUB 108,023 bil. on the basis of the results for the first nine months of 2022. (USD 1.520 bil.) at contractual prices. The sector volume expanded by 11% 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 2% to 57.365 mil. packs. The average cost of a FPP pack through the DLO program was USD 26.50 in contractual prices (a year ago it was USD 23.17).

The top ten manufacturers ranking in the DLO segment hasn't changed much based on the results for January-September of 2022 (Table 1). GENERIUM (+14%[2]) has maintained and even consolidated the lead, and TAKEDA (+4%) continued to hold its rank 2 in the top ten ranking despite low growth rates and decrease in the market share. In addition, the manufacturers JOHNSON & JOHNSON (+29%), NOVARTIS (+4%), SANOFI (-4%) and OCTAPHARMA (-13%) held their previous ranks four and seven through nine, respectively. ROCHE (2.2-fold growth in purchases) and the newcomer BOEHRINGER (+35%) rounding out the top ten ranking were also able to improve their positions, moving up to ranks six and ten. In contrast, the drug makers CELGENE (-2%) and BIOCAD (+10%) moved down to ranks five and six. The total share of the top ten drug manufacturers under DLO Programme expanded by slightly more than 3 rating point to 63.0%.

Table 1. The top 10 drug manufacturers for DLO*

Rank in the top ten		Manufacturer*	Share in total DLO volume, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	GENERIUM ZAO RF	11.0	10.7
2	2	**TAKEDA**	9.8	10.5
3	6	**ROCHE**	9.1	4.6
4	4	**JOHNSON & JOHNSON**	7.6	6.5
5	3	**CELGENE**	6.9	7.8
6	5	BIOCAD RF	6.3	6.3
7	7	**NOVARTIS**	4.3	4.6
8	8	**SANOFI**	3.1	3.6
9	9	OCTAPHARMA	2.5	3.2
10	12	**BOEHRINGER I**	2.4	2.0
Total			63.0	59.9

*AIPM members are in bold

Two newcomers broke into the top ten brands ranking (Table 2). They were HEMLIBRA (3.3-fold growth in purchases) and TEBERIF (+92%), which moved up to ranks four and seven. The markets of the other four brands developed at a fast pace: Purchases of the brand OCREVUS grew by 2.4 times, those of ELIZARIA increased by two times, and those of DARZALEX — by 67%, which allowed them to move up to ranks two, three and six, respectively. The less dynamic PLEGRIDY (+27%) held and reinforced its previous rank ten. REVLIMIDE (-2%) kept its previous rank number one, despite the negative growth rates. ADVATE that had been placed at rank number two earlier showed 34% reduction in purchases, which resulted in a loss of six rating point ELAPRASE (+5%) and TYSABRI (+1%) moved down one rank. The total share of the top 10 ranking grew from 27.4% to 33.2%.

Table 2. The top 10 Brands in DLO segment

Rank in the top ten		Brand	Share in total DLO volume, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	REVLIMIDE	6.9	7.8
2	7	OCREVUS	4.8	2.2
3	6	ELIZARIA	4.6	2.6
4	25	HEMLIBRA	3.2	1.1
5	4	ELAPRASE	2.9	3.1
6	9	DARZALEX	2.7	1.8
7	16	TEBERIF	2.4	1.4
8	2	ADVATE	2.0	3.8
9	8	TYSABRI	1.9	2.1
10	10	PLEGRIDY	1.9	1.6
Total			33.2	27.4

Just as the corresponding brand, LENALIDOMIDE (-2%) continued to hold rank number one in the top 10 INN and group names ranking (Table 3). INN IDURSULFASE (+5%) also held its previous rank six, whereas the other INNs changed them. Five INNs were able to improve their positions. OCRELIZUMAB (2.6-fold growth in purchases), ECULIZUMAB (2-fold growth), INTERFERON BETA-1A (+26%) and the newcomer EMICIZUMAB (3.3-fold growth) moved up to ranks two through five, respectively. One more newcomer, DARATUMUMAB (+67%) moved up to rank seven. FACTOR VIII (-25%), RITUXIMAB (-35%) and OCTOCOG ALFA (-21%), which significantly cut back on their purchases, moved down to the bottom three ranks. The cumulative share of the top-ten increased by 2.3 rating point and achieved 35.4%.

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, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	LENALIDOMIDE	6.9	7.8
2	9	OCRELIZUMAB	4.8	2.2
3	8	ECULIZUMAB	4.6	2.6
4	7	INTERFERON BETA-1A	3.5	3.1
5	24	EMICIZUMAB	3.2	1.1
6	6	IDURSULFASE	2.9	3.1
7	13	DARATUMUMAB	2.7	1.8
8	4	FACTOR VIII	2.5	3.7
9	2	RITUXIMAB	2.3	3.9
10	3	OCTOCOG ALFA	2.0	3.8
Total			35.4	33.1

Six of the top-10 ATC groups held their own in the top ten ranking (Table 4). L04 Immunosuppressants (+26%), B02 Antihemorrhagics (-1%) and L01 Antineoplastic agents (+10%) maintained their top positions, and A16 Other alimentary tract and metabolism products (+7%), B01 Antithrombotic agents (+34%) and R03 Drugs for obstructive airway diseases (+7%) kept their previous ranks six through eight, respectively. Two ATC groups, L03 Immunostimulants (+19%) and L02 Endocrine therapy (+22%) moved up to ranks four and nine, displacing A10 Drugs used in diabetes (-3%) and B03 Anti-anaemic preparations (-18%) one rank down. Note that ATC group L02 broke in the top-10 ranking for the first time. The total share of the top 10 reduced from 87.3% to 87.0%.

Table 4. The top ten ATC groups in DLO segment

Rank in the top ten		ATC code	ATC group	Share in total DLO volume, %	
9 mon. 2022	9 mon. 2021			9 mon. 2022	9 mon. 2021
1	1	L04	IMMUNOSUPPRESSANTS	28.1	24.8
2	2	B02	ANTIHEMORRHAGICS	16.9	18.9
3	3	L01	ANTINEOPLASTIC AGENTS	11.2	11.3
4	5	L03	IMMUNOSTIMULANTS	8.0	7.5
5	4	A10	DRUGS USED IN DIABETES	7.9	9.0
6	6	A16	OTHER ALIMENTARY TRACT AND METABOLISM PRODUCTS	6.9	7.2
7	7	B01	ANTITHROMBOTIC AGENTS	3.4	2.8
8	8	R03	DRUGS FOR OBSTRUCTIVE AIRWAY DISEASES	2.3	2.4
9	11	L02	ENDOCRINE THERAPY	1.4	1.3
10	9	B03	ANTIANEMIC PREPARATIONS	1.2	1.7
Total				87.3	87.0

Data on supplies to the top ten regions of Russia under State Reimbursement Program (DLO) are shown in Table 5. All of the top ten regions retained their positions unchanged, and four of them strengthened them due to outperformance rates. These regions are St. Petersburg (+22%), Sverdlovsk Region (+14%), Tatarstan (+17%) and Chelyabinsk region (+30%). Purchases reduced in Novosibirsk Region (-6%) and Bashkortostan (-8%) compared to the similar period of the last year. The cumulative share of the top 10 regions reduced from 40.6% to 40.1%.

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

Rank in the top ten		Region	Share in total DLO volume, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	Moscow	10.9	11.0
2	2	Moscow Region	5.0	5.2
3	3	Saint Petersburg	4.3	3.9
4	4	Sverdlovsk Region	3.6	3.5
5	5	Krasnodar Region	3.1	3.3
6	6	Tatarstan Republic	3.3	3.1
7	7	Novosibirsk Region	2.3	2.8
8	8	Bashkortostan Republic	2.3	2.7
9	9	Rostov Region	2.6	2.6
10	10	Chelyabinsk Region	2.8	2.4
Total			40.1	40.6

Conclusion. On the basis of the results for the first nine months of 2022, the DLO sector brought in RUB 108.023 bil. (USD 1.520 bil.) at contractual prices, which is by 11% in terms of roubles and by 16% in terms of dollars more than in January-September 2021. In pack terms, the supplies under the program increased by 2% to 57.365 mil. packs. The average cost of FPP included in the DLO Programme increased as compared to the previous year (USD 26.50 vs USD 23.17).

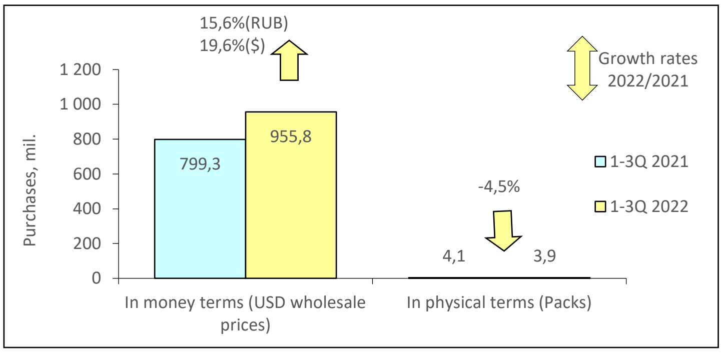
[2]Hereinafter, unless otherwise stated, growth gains are stated in the rouble equivalent or national currency.

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

COST DEMANDING NOSOLOGIES (VZN) PROGRAM, 1-3 Q, 2022

According to IQVIA, at the end of nine months of 2022 the volume of supplies under the VZN program in contract prices amounted to RUB 68.7 bil. (USD 955.8 mil.) (Fig. 1). The purchases saw a 15.6% decrease in terms of national currency and a 19.6% increase in terms of dollars as compared to the same period of the previous year. In natural terms, the supplies decreased by 4.5% to 3.9 mil. packs. In 2022, the VZN procurement nomenclature was updated to include four INNs: Ixazomib and 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 1-3 quarter of 2022 the purchases of these INNs accounted for 4.7% of the total volume of VZN program).

Figure 1. Purchases trend under the VZN Program in 1-3 Q, 2022 relative to 1-3 Q, 2021.*



Compared to 1-3 Q 2021, the groups of drugs for the treatment of haemolytic-uremic syndrome (+98%) and multiple sclerosis (+42%) showed the largest increase in purchases in terms of roubles. A negative increase in purchases was recorded in the groups of drugs used in transplantation, (-5%) and for the treatment of systemic-onset juvenile arthritis (-3%). Based on the results for nine months of 2022, the group of drugs to treat multiple sclerosis continued as the leader in the purchases rating, the drugs to treat haemophilia and oncohematological drugs moved to ranks two and three, respectively.

Table 1. Supplies pattern under the VZN Program

Nosologies	INN	Share in total VZN supplies (RUB), %	
		1-3Q 2022	1-3Q 2021
Sclerosis Multiplex		**27.0**	**21.9**
	OCRELIZUMAB	7.5	3.5
	INTERFERON BETA-1A	5.5	5.0
	NATALIZUMAB	2.9	3.4
	PEGINTERFERON BETA-1A	2.9	2.6
	INTERFERON BETA-1B	2.8	2.9
	TERIFLUNOMIDE	1.8	2.2
	CLADRIBINE	1.7	0.0
	GLATIRAMER ACETATE	1.2	1.5
	ALEMTUZUMAB	0.7	0.9
Haemophilia		**26.2**	**30.5**
	EMICIZUMAB	5.1	1.8
	FACTOR VIII	3.9	6.1
	OCTOCOG ALFA	3.2	6.3
	FACTOR VIII*FACTOR VON WILLEBRAND	3.2	3.7
	MOROCTOCOG ALFA	2.6	5.4
	FACTOR VIII INHIBITOR BY-PASSING FRACTION	2.5	2.0
	EPTACOG ALFA (ACTIVATED)	2.2	2.6
	FACTOR IX	1.5	1.8
	EFMOROCTOCOG ALFA	0.8	0.0
	SIMOCTOCOG ALFA	0.7	0.4
	NONACOG ALFA	0.5	0.5
Oncohematology		**21.7**	**23.3**
	LENALIDOMIDE	10.8	12.7
	DARATUMUMAB	4.2	2.9
	RITUXIMAB	3.5	6.2
	IXAZOMIB	1.4	0.0
	POMALIDOMIDE	0.9	0.0
	BORTEZOMIB	0.5	0.9
	IMATINIB	0.3	0.4
	FLUDARABINE	0.1	0.2
Mucopolysaccharidosis type I, II and VI		**8.2**	**9.4**
	IDURSULFASE	4.6	5.1
	GALSULFASE	2.0	2.5
	LARONIDASE	1.0	1.1
	IDURSULFASE BETA	0.6	0.8
Haemolytic-uremic syndrome		**7.3**	**4.2**
	ECULIZUMAB	7.3	4.2
Transplantation		**3.1**	**3.7**
	TACROLIMUS	1.8	2.3
	MYCOPHENOLIC ACID	0.7	0.8
	EVEROLIMUS	0.4	0.4
	CICLOSPORIN	0.1	0.2
	MYCOPHENOLATE MOFETIL	0.1	0.1
Systemic-onset juvenile arthritis.		**2.4**	**2.9**
	CANAKINUMAB	1.9	2.3
	TOCILIZUMAB	0.5	0.6
	ETANERCEPT	0.0	0.0
	ADALIMUMAB	0.0	0.0
Gaucher disease		**1.9**	**1.7**
	IMIGLUCERASE	1.2	0.9
	VELAGLUCERASE ALFA	0.8	0.8
	TALIGLUCERASE ALFA	0.0	0.0
Mucoviscidosis		**1.8**	**2.0**
	DORNASE ALFA	1.8	2.0
Pituitary dwarfism		**0.3**	**0.3**
	SOMATROPIN	0.3	0.3

Generium moved down to rank number one in the top ten manufacturers ranking (Table 3). Purchases of drugs manufactured by Generium increased by 14% compared to 1-3 Quarter 2021. The growth in sales was provided primarily by 90% increase in purchases of Elizaria (Emicizumab) for the treatment of atypical haemolytic uremic syndrome, and by 49% increase in purchases of Glurazyme (Imiglucerase) for the treatment of Gaucher's disease. Takeda moved up to rank two in the top drug manufacturers ranking. The most significant positive contribution to the procurement trend in the 1-3 quarter was made by Elaprase for the treatment of mucopolysaccharidosis II (+5%), which moved up to rank five in the top ten brands ranking. Another best-seller of the company, recombinant blood factor VIII Advate, moved from rank 2 to 8 in the ranking due to a 41% decrease in purchases. Roche moved up to rank three from six in the ranking, 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 2 and 4 in the top ten brands ranking, respectively. Celgene moved to rank four (Table 3). Revlimid continued to be at the head of the brands ranking with a large margin from other drugs, though its share reduced from 12.7% to 10.8%.

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

Rank in the top ten		Brand	Share in total VZN supplies, %	
1-3Q 2022	1-3Q 2021		1-3Q 2022	1-3Q 2021
1	1	REVLIMID	10.8	12.7
2	7	OCREVUS	7.5	3.5
3	5	ELIZARIA	7.3	4.2
4	23	HEMLIBRA	5.1	1.8
5	4	ELAPRASE	4.6	5.1
6	9	DARZALEX	4.2	2.9
7	14	TEBERIF	3.7	2.2
8	2	ADVATE	3.2	6.3
9	8	TYSABRI	2.9	3.4
10	10	PLEGRIDY	2.9	2.6
Total			52.2	50.2

J&J moved down to rank five in the top ten manufacturers ranking though its sales increased by 30%. All drugs of the manufacturer were included in the top ten brands ranking. J&J's Darzalex (Daratumumab) for the treatment of multiple myeloma moved up to rank 6 in the ranking, Tysabri (Natalizumab) and the newcomer Plegridy (Peginterferon beta-1a) moved up to ranks 9 and 10, respectively. The manufacturer Biocad moved up to rank six in the top ten manufacturers ranking. Purchases of a drug to treat multiple sclerosis Teberif (Interferon beta-1a) increased by 97% compared with 1-3 quarter of 2021, which allowed the drug to move up to rank 7 from 14 in the top ten brands ranking (Table 2).

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

Rank in the top ten		Manufacturer*	Share in total VZN supplies, %	
1-3Q 2022	1-3Q 2021		1-3Q 2022	1-3Q 2021
1	1	GENERIUM ZAO RF	17.3	17.5
2	2	**TAKEDA**	15.1	16.8
3	6	**ROCHE**	13.2	6.1
4	3	CELGENE	10.8	12.7
5	4	**JOHNSON & JOHNSON**	10.0	8.9
6	5	BIOCAD RF	8.6	8.9
7	7	OCTAPHARMA	4.0	5.1
8	9	**NOVARTIS**	2.3	2.6
9	8	**CSL BEHRING GMBH**	2.0	2.7
10	10	**BIOMARIN IRELAND**	2.0	2.5
Total			85.3	83.8

*AIPM members are in bold

Conclusion: In total, the share of Russian drugs in the VZN segment pattern increased in terms of packs from 47% to 49%. In terms of roubles, the share reduced from 22% to 20%. The share of localized products (localization of the FFP stage) increased from 45% to 48% (in value terms).

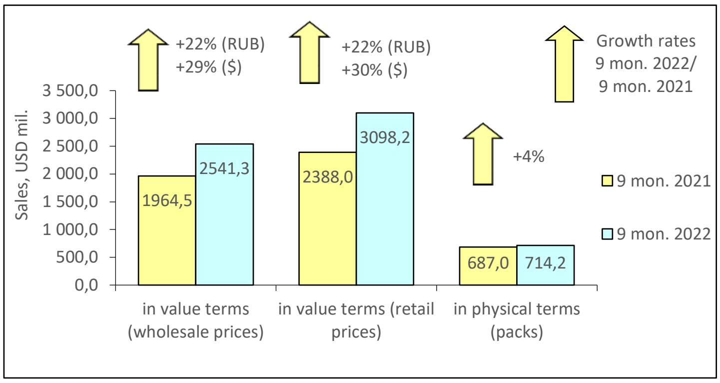
* Here and elsewhere IQVIA's data are used

CFD PHARMACY MARKET (WITHOUT MOSCOW): 2022 FIRST NINE 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 January-September of 2022 the average wage in the CFD (inclusive of Moscow) was RUB 78254 (USD 1109.51), which was 27% higher than the average wage in Russia (RUB 61794).

According to the results of the Retail Audit of Finished Pharma Products (FPP) in Russian Federation™, at the end of the first nine months of 2022 the sales of drugs in physical terms in the CFD (without Moscow) saw a 4% increase to 714.201 mil. packs. In money terms, the market expanded by 22% in terms of roubles and 29% in terms of dollars. At the same time, the volume reached RUB 176.781 bil. (USD 2.541 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 4.34 against USD 3.48 at retail prices. At the end of January-September 2022, an average amount spent by the region residents for FPPs in the pharmacies amounted to USD 117.05.

Figure 1. The CFD (without Moscow) pharmacy market for 9 months of 2021 – 9 months 2022*



BAYER (+13%) and STADA (+26%) continued to demonstrate the largest sales volumes in the market of the Central Federal District (excluding Moscow) following the results of nine months of 2022 (Table 1). On top of that, the former reduced its market share due to lagging in sales rates, and the latter, in contrast, increased its market share. ABBOTT (+16%) also held its previous rank ten in the ranking, while the remaining manufacturers from the top ten changed them. OTCPHARM (+15%), SERVIER (+24%) and GLAXOSMITHKLINE (+19%) moved one rank up, coming in at numbers three, four and eight, whereas the manufacturer KRKA (+24%) moved up to rank five from seven. At the same time, TEVA (+11%) and BERLIN-CHEMIE/MENARINI (+17%) lost one rating point each, and SANOFI (+5%) lost three rating point. The cumulative share of the top ten reduced by 1.5 rating point and accounted for 33.5%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	**BAYER**	4.8	5.2
2	2	**STADA**	4.1	3.9
3	4	OTCPHARM	3.5	3.7
4	5	**SERVIER**	3.4	3.4
5	7	**KRKA**	3.3	3.2
6	3	**SANOFI**	3.3	3.8
7	6	**TEVA**	3.0	3.3
8	9	**GLAXOSMITHKLINE**	2.8	2.9
9	8	**BERLIN-CHEMIE/MENARINI**	2.8	2.9
10	10	**ABBOTT**	2.6	2.8
Total			33.5	35.0

*AIPM members are in bold

The top-10 brands ranking didn't change much and most of its brands kept their previous positions (Table 2). As before, XARELTO (+1%), ELIQUIS (+24%), ARBIDOL (+28%) and DETRALEX (+17%) were placed at the upper part of the top ten ranking. The brands MEXIDOL (+10%), NUROFEN (+12%) and PENTALGIN (+14%) that were placed at ranks six, seven and ten held their own in the ranking. One of the most dynamic brands INGAVIRIN (+27%) moved up to rank five from nine, whereas CONCOR (+5%) that used to hold that rank earlier, in contrast, moved down to rank eight. CARDIOMAGNYL (+12%) moved one rank down. The total share of the top 10 brands reduced from 9.0% to 8.5%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	XARELTO	1.5	1.8
2	2	ELIQUIS	1.3	1.3
3	3	ARBIDOL	0.9	0.9
4	4	DETRALEX	0.8	0.8
5	9	INGAVIRIN	0.7	0.7
6	6	MEXIDOL	0.7	0.8
7	7	NUROFEN	0.7	0.7
8	5	CONCOR	0.7	0.8
9	8	CARDIOMAGNYL	0.6	0.7
10	10	PENTALGIN	0.6	0.6
Total			8.5	9.0

The top INN and generic names ranking leader changed (Table 3). XYLOMETAZOLINE (+23%) moved up to rank one from two, displacing RIVAROXABAN (+1%) one rank down. APIXABAN (+24%), DIOSMIN*HESPERIDIN (+27%) and IBUPROFEN (+21%) retained their previous ranks three and four. NIMESULIDE that showed 33% growth in sales moved down from rank seven to five, whereas UMIFENOVIR and ROSUVASTATIN, which increased their sales by 32%, moved up to ranks eight and ten. On top of that, the latter broke into the ranks of the top 10 ranking for the first time. INN BISOPROLOL (+9%) and PANCREATIN (+14%) fell in the ranks, moving down to ranks seven and nine, respectively. The cumulative share of the top 10 under review didn't virtually change and accounted for 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, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	2	XYLOMETAZOLINE	1.6	1.5
2	1	RIVAROXABAN	1.5	1.8
3	3	APIXABAN	1.3	1.3
4	4	DIOSMIN*HESPERIDIN	1.3	1.3
5	7	NIMESULIDE	1.2	1.1
6	6	IBUPROFEN	1.1	1.1
7	5	BISOPROLOL	1.0	1.2
8	9	UMIFENOVIR	1.0	0.9
9	8	PANCREATIN	0.9	0.9
10	12	ROSUVASTATIN	0.9	0.8
Total			11.8	11.9

Group C09 Agents acting on the rennin-angiotensin system (+24%) secured the leading positions among the top ten ATC groups due to high growth rates (Table 4). The markets of the other six ATC groups developed at a fast pace. At the same time, N02 Analgesics (+26%) continued to hold rank seven, while M01 Anti-inflammatory and antirheumatic products (+27%), J05 Antivirals for systemic use (+38%), G03 Sex hormones (+37%) and N06 Psychoanaleptics (+24%) moved up one rank, coming in at numbers two, four, five and ten, respectively. In contrast to them, the group R01 Nasal preparations (+25%) lost one rating point, despite the outperformance growth rates. The less dynamic C05 Vasoprotectives (+19%) kept their previous rank eight, whereas A07 Antidiarrheals (+14%) broke into the top ten ranking and rounded it out. The group B01 Antithrombotic agents (+9%) moved one rank down, to number three. In total, the top ten ATC groups accumulated 38.8% of the regional market, which was more than the year-earlier period indicator (38.2%).

Table 4. The top ten ATC groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
9 mon. 2022	9 mon. 2021			9 mon. 2022	9 mon. 2021
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.9	5.7
2	3	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.4	5.1
3	2	B01	ANTITHROMBOTIC AGENTS	4.8	5.4
4	5	J05	ANTIVIRALS FOR SYSTEMIC USE	3.7	3.3
5	6	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.6	3.2
6	4	R01	NASAL PREPARATIONS	3.6	3.5
7	7	N02	ANALGESICS	3.3	3.2
8	8	C05	VASOPROTECTIVES	3.1	3.2
9	10	N06	PSYCHOANALEPTICS	2.9	2.8
10	11	A07	ANTIDIARR.,INTEST. ANTIINFL./ ANTIINFECT. AGENTS	2.6	2.8
Total				38.8	38.2

Conclusion. At the end of the first nine months of 2022, the pharmacy market of the Central Federal District (without Moscow) reached RUB 215.361 bil. (USD 3.098 bil). which was 22% in terms of roubles and 30% in terms of dollars more than in the same period of 2021. In pack terms, the market also showed positive growth rates (+4%) and achieved 714.201 mil. packs. In the analysed period of 2022, the average cost of an FPP pack in the regional pharmacies was USD 4.34, which was higher than the last year figure (USD 3.48), and less than the national average (USD 4.52). The average medicine expenses of the region residents were also lower than the national average expenses in Russia (USD 117.05 vs. USD 100.95).

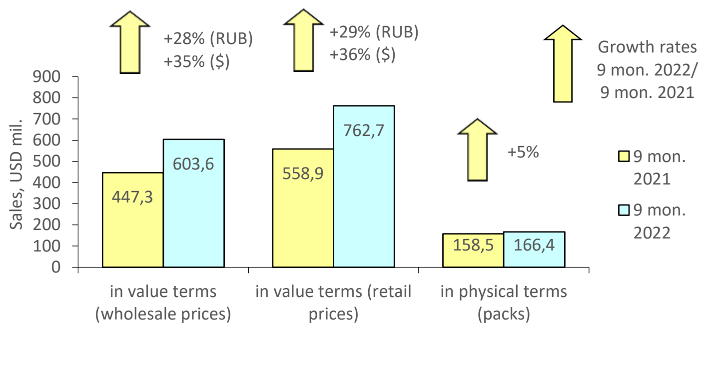
* Here and elsewhere IQVIA's data are used

NWFD (EXCLUS. OF SAINT PETERSBURG) PHARMACY MARKET: 2022 FIRST NINE MONTHS RESULTS

According to Federal State Statistics Service, as of January 1, 2022 estimated population of the North-Western Federal District (NWFD) (exc. 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 January-September 2022 the average wage in NWFD (inc. St. Petersburg) was RUB 68822 (USD 975.78), which was 11% higher than the average wage in Russia (RUB 61794).

According to the results of the Retail Audit of Finished Pharmaceutical Products (FPP) in the Russian Federation™, the sales of drugs in physical terms in the NWFD (without St. Petersburg) continued to show positive growth rates (+5%) and amounted to 166.421 mil. Packs based on the results for January-September of 2022. In money terms, the market increased by 28% in terms of roubles and 35% in terms of dollars. At the same time, the volume of the market amounted to RUB 42.299 bil. (USD 603.573 mil.) at wholesale prices (Fig. 1). The share of the region was 5.2% of the Russian retail pharmacy sales. The average cost of an OTC pack in the pharmacies increased: USD 4.58 vs. USD 3.53 at retail prices in the year-earlier period. The average amount spent by the residents of the region for FPPs in the pharmacies for nine months of 2022 amounted to USD 89.48.

Figure 1. The NWFD (without St. Petersburg) pharmacy market for 9 months of 2021 – 9 months 2022.*



BAYER (+27%) held its previous rank number one in the top ten manufacturers ranking in the pharmacy market of NWFD at the end of January-September period 2022 (Table 1). The manufacturers KRKA (+25%), SANOFI (+18%), TEVA (+25%) and GEDEON RICHTER (+24%) held their previous ranks five through eight, respectively. Four of the top 10 INN ranking managed to rise in the ranks. SERVIER (+31%), STADA (+27%), GLAXOSMITHKLINE (+26%) and BERLIN-CHEMIE/MENARINI (+35%) moved up one rank, coming in at ranks two, three, nine and ten, respectively. Note that the latter became the only newcomer of the top-10 ranking. The manufacturer OTCPHARM (+15%) lost two rating point and moved down to rank four. The total share of the top 10 drug manufacturers reduced by slightly less than 1 rating point 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, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	**BAYER**	5.2	5.2
2	3	**SERVIER**	4.0	3.9
3	4	**STADA**	3.9	3.9
4	2	OTCPHARM	3.8	4.2
5	5	KRKA	3.5	3.6
6	6	**SANOFI**	3.3	3.6
7	7	**TEVA**	3.3	3.3
8	8	GEDEON RICHTER	3.0	3.2
9	10	**GLAXOSMITHKLINE**	2.9	2.9
10	11	**BERLIN-CHEMIE/MENARINI**	2.7	2.6
Total			35.6	36.5

*AIPM members are in bold

The top ten brands leader also remained unchanged: XARELTO (+67%) held and reinforced its previous rank number one. 2). The market of another five brands from the top ten ranking developed at a fast pace. ELIQUIS (+61%), DETRALEX (+33%) and INGAVIRIN (+43%) moved one rank up, coming in at numbers two, four and six, and the newcomers THERAFLU (+92%) and NIMESIL (2.1-fold growth in sales) broke into the ranks of the top ten brands, moving up to ranks seven and eight. At the same time, they displaced the brands ARBIDOL (+20%), NUROFEN (+18%) and LORISTA (+26%) one rank down, whereas CONCOR (+14%) lost three rating point The total share of the top 10 brands increased from 8.8% to 9.7%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	XARELTO	1.6	1.5
2	3	ELIQUIS	1.5	1.2
3	2	ARBIDOL	1.4	1.4
4	5	DETRALEX	0.8	0.8
5	4	NUROFEN	0.8	0.9
6	7	INGAVIRIN	0.8	0.7
7	16	THERAFLU	0.8	0.5
8	21	NIMESIL	0.7	0.4
9	6	CONCOR	0.7	0.8
10	9	LORISTA	0.6	0.6
Total			9.7	8.8

The top ten INNs and grouping names ranking did not change in composition (Table 3). Only two brands managed to maintain their positions. They were RIVAROXABAN (+39%) and XYLOMETAZOLINE (+30%) placed at numbers one and three. The other INNs changed their ranks, of which three INNs improved them. APIXABAN (+61%) moved up to rank two from seven, NIMESULIDE (+58%) from rank eight to five, and ROSUVASTATIN (+39%) from rank ten to nine. They displaced the composition DIOSMIN*HESPERIDIN (+37%) and INN ATORVASTATIN (+16%) one rank down to numbers six and ten, whereas UMIFENOVIR (+23%), IBUPROFEN (+27%) and BISOPROLOL (+15%) moved down to ranks four, seven and eight, respectively. In total, ten INNs and group names accounted for 12.9% of the regional sales against 12.2% 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, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	RIVAROXABAN	1.6	1.5
2	7	APIXABAN	1.5	1.2
3	3	XYLOMETAZOLINE	1.4	1.4
4	2	UMIFENOVIR	1.4	1.5
5	8	NIMESULIDE	1.3	1.1
6	5	DIOSMIN*HESPERIDIN	1.3	1.2
7	4	IBUPROFEN	1.3	1.3
8	6	BISOPROLOL	1.1	1.2
9	10	ROSUVASTATIN	1.0	0.9
10	9	ATORVASTATIN	0.9	1.0
Total			12.9	12.2

Shifts occurred only in the middle part of the top ten ATC groups ranking in the regional market (Table 4). On top of that, three groups made rating progress and only one, in contrast, fell in the ranks. N02 Analgesics (+40%) and R05 Cough and cold preparations (+26%) moved one rank up, coming in at number seven and nine, displacing C05 Vasoprotectives (+36%) one rank down. The newcomer A11 Vitamins (+23%) broke into the top ten ranking, moving up to rank ten. The groups C09 Agents acting on the rennin-angiotensin system (+23%), M01 Anti-inflammatory and antirheumatic products (+36%), B01 Antithrombotic agents (+34%), G03 Sex hormones (+30%), J05 Antivirals for systemic use (+42%) and R01 Nasal preparations (+28%) as before held the top six ranks. The top ten ATC groups accumulated 40.5% of the regional pharmacy sales, 39.5% 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, %	
9 mon. 2022	9 mon. 2021			9 mon. 2022	9 mon. 2021
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	6.1	6.3
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.7	5.4
3	3	B01	ANTITHROMBOTIC AGENTS	4.9	4.7
4	4	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.3	4.2
5	5	J05	ANTIVIRALS FOR SYSTEMIC USE	4.2	3.7
6	6	R01	NASAL PREPARATIONS	3.5	3.4
7	8	N02	ANALGESICS	3.3	3.0
8	7	C05	VASOPROTECTIVES	3.0	3.0
9	10	R05	COUGH AND COLD PREPARATIONS	2.9	2.9
10	12	A11	VITAMINS	2.6	2.7
Total				40.5	39.5

Conclusion. In January-September of 2022, the pharmacy market of the NWFD (excl. of St Petersburg) brought in RUB 53.360 bil. (USD 762.664 mil.). which was 29% in terms of roubles and 36% in terms of dollars more than in the same period of 2021. In pack terms, the market also showed positive growth rates (+5%) and achieved 166.421 mil. packs. According to the results for 9 month of 2022, the average cost of an FPP pack in the regional pharmacies was USD 4.58, Which was higher than the indicator of the same period of 2021 (USE 3.53) and average across the country (USD 4.52). The expenses of district residents for FPPs in the pharmacies were considerably lower than the national average (USD 89.48 vs. USD 100.95).

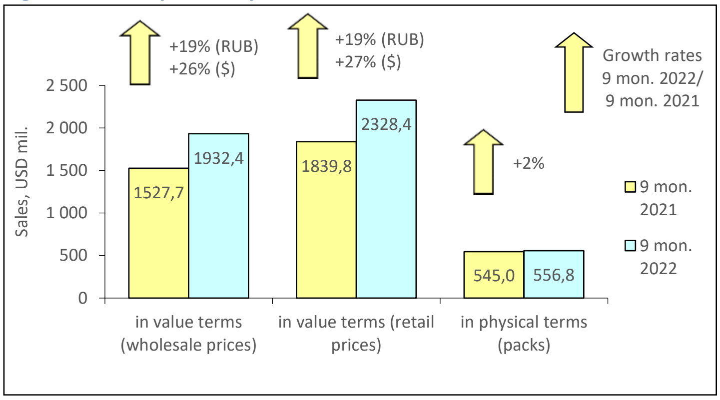
* Here and elsewhere IQVIA's data are used

VFD PHARMACY MARKET: 2022 FIRST SIX 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 January-September of 2022 the average wage in the VFD was RUB 44722 (USD 634.08), which was 28% lower than the national average wage in Russia (RUB 61794).

According to the results of Retail Audit of OTC drugs in Russian Federation™, the pharmacy market of VFD in pack terms expanded by 2% to 556.805 mil. packs for three quarters of 2022, as compared to the same period of the last year (Fig. 1). The sales in terms of wholesale prices increased by 19% in terms of roubles and 26% in terms of dollars and reached RUB 133.927 bil. (USD 1.932 bil.). A region's share in the total pharmacy sales in Russia accounted for 15.8%. Based on the results for January-September of 2022, the average cost of an FPP in the VFD pharmacies increased as compared with the year-earlier period (USD 3.38) and was equal to USD 4.18. The average per capita expenses for purchase of drugs in the pharmacies were estimated at USD 80.72.

Figure 1. Russia pharmacy market for 9 months of 2021 – 9 months 2022.*



At the end of nine months of 2022, OTCPHARM (+8%), BAYER (+9%) and STADA (+25%) continued to take the lead in the top ten manufacturers on the Volga Federal District retail market (Table 1). The manufacturers KRKA (+16%) and SERVIER (+24%) moved up to ranks four and five, displacing SANOFI (+1%) two ranks down, and ABBOTT (+17%) and TEVA (+4%) one rank down. The newcomers BINNOPHARM (+21%) and GEDEON RICHTER (+22%) were placed at the lower part of the top ten ranking. The total share of the top 10 brands reduced from 31.7% to 30.5%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	OTCPHARM	4.0	4.3
2	2	**BAYER**	3.9	4.2
3	3	**STADA**	3.8	3.6
4	5	**KRKA**	3.0	3.1
5	8	**SERVIER**	2.9	2.8
6	4	**SANOFI**	2.9	3.4
7	6	**ABBOTT**	2.9	2.9
8	7	**TEVA**	2.5	2.9
9	11	BINNOPHARM GROUP	2.3	2.3
10	12	GEDEON RICHTER	2.3	2.3
Total			30.5	31.7

*AIPM members are in bold

One newcomer EDARBI (+67%) broke into the ranks of the top ten brand names ranking, moving up to rank nine (Table 2). In addition, only one brand moved up to the higher positions: INGAVIRIN (+26%) moved up to rank six from nine. PENTALGIN (+10%) that held that rank earlier moved down to rank eight, and ACTOVEGIN (+12%) displaced from rank eight to the last one. ARBIDOL (+15%), XARELTO (+4%), ELIQUIS (+8%), MEXIDOL (+14%) and HEPTRAL (+9%) continued to hold ranks one through five, and DETRALEX (+21%) held its previous rank seven. The total share of the top 10 brands reduced from 7.8% to 7.6%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	ARBIDOL	1.2	1.3
2	2	XARELTO	1.1	1.2
3	3	ELIQUIS	1.0	1.1
4	4	MEXIDOL	0.7	0.7
5	5	HEPTRAL	0.6	0.7
6	9	INGAVIRIN	0.6	0.6
7	7	DETRALEX	0.6	0.6
8	6	PENTALGIN	0.6	0.6
9	21	EDARBI	0.6	0.4
10	8	ACTOVEGIN	0.6	0.6
Total			7.6	7.8

Only the leaders of the top ten INNs and grouping names UMIFENOVIR (+24%) and XYLOMETAZOLINE (+21%) held its own in the ranking (Table 3). The more dynamic composition DIOSMIN* HESPERIDIN (+30%), as well as IBUPROFEN and NIMESULIDE that showed a 24% growth in sales moved up to ranks three, five and nine, respectively. At the same time, RIVAROXABAN (+4%), APIXABAN (+8%), BISOPROLOL (+13%), PANCREATIN (+10%) and ETHYLMETHYLHYDROXYPYRIDINE (+14%) that showed not so pronounced growth rates moved down to rank four, and ranks six through eight and ten, respectively. The top ten INNs and grouping names' share accounted for 10.9% of the regional market.

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, %	
9 mon. 2022	9 mon. 2021г.		9 mon. 2022	9 mon. 2021
1	1	UMIFENOVIR	1.7	1.6
2	2	XYLOMETAZOLINE	1.3	1.2
3	7	DIOSMIN*HESPERIDIN	1.1	1.0
4	3	RIVAROXABAN	1.1	1.2
5	8	IBUPROFEN	1.0	1.0
6	4	APIXABAN	1.0	1.1
7	6	BISOPROLOL	1.0	1.0
8	5	PANCREATIN	1.0	1.1
9	10	NIMESULIDE	0.9	0.9
10	9	ETHYLMETHYLHYDROXYPYRIDINE	0.9	0.9
Total			10.9	11.0

C09 Agents acting on the rennin-angiotensin system (+18%) and M01 Anti-inflammatory and antirheumatic products (+24%) remained the best-selling ATC groups on the region market based on the results for the first nine months of 2022 (Table 4). N02 Analgesics (+23%) also held their previous rank seven. The groups J05 Antivirals for systemic use (+24%), G03 Sex hormones (+27%) and R01 Nasal preparations (+25%) showed the higher growth rates and moved up to ranks three, five and six, respectively. The only newcomer R05 Cough and cold preparations (+21%) broke into the ranks of the top ten, coming in at number ten of the top ten ranking. At the same time, ATC groups with low growth rates such as B01 Antithrombotic agents (+5%) and J01 Antibacterials for systemic use (+1%), as well as N06 Psychoanaleptics (+20%) moved down to ranks four, eight and nine. In total, the top ten ATC groups accumulated 38.0% of the regional sales, which was virtually the same as a year-earlier period indicator (38.1%).

Table 4. The top ten ATC groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
9 mon. 2022	9 mon. 2021			9 mon. 2022	9 mon. 2021
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.5	5.6
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.4	5.1
3	4	J05	ANTIVIRALS FOR SYSTEMIC USE	4.3	4.1
4	3	B01	ANTITHROMBOTIC AGENTS	4.0	4.5
5	6	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.7	3.5
6	9	R01	NASAL PREPARATIONS	3.1	3.0
7	7	N02	ANALGESICS	3.1	3.0
8	5	J01	ANTIBACTERIALS FOR SYST USE	3.1	3.6
9	8	N06	PSYCHOANALEPTICS	3.0	3.0
10	11	R05	COUGH AND COLD PREPARATIONS	2.7	2.7
Total				38.0	38.1

Conclusion. Based on the results for January-September 2022, the pharmacy market in the VFD was estimated at RUB 161.273 bil. (USD 2.328 bil.) at retail prices. At the same time, the market behaviour was positive both in rouble (+19%) and dollar (+27%) terms. In natural terms, the sales increased by 2% to 556.805 mil. packs. The average cost of an OTC pack based on the results for nine months of 2022 was USD 4.18 which was more than in the year-earlier period (USD 3.38), but lower than the national average (USD 4.52). Per capita expenses of the district residents for purchase of medicines in the pharmacies were also lower than the national average figures (USD 80.72 vs. USD 100.95).

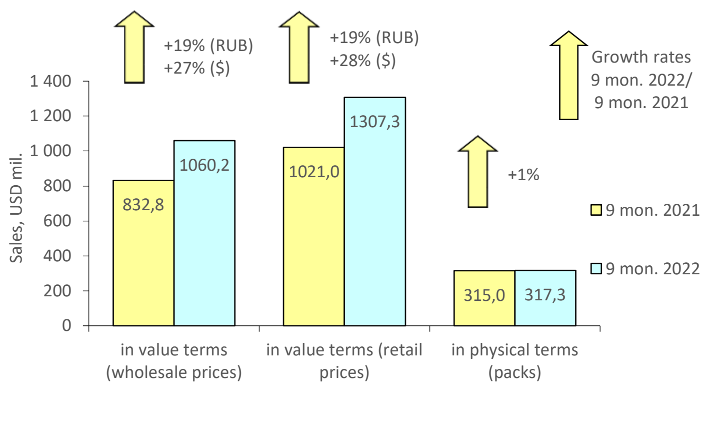
* Here and elsewhere IQVIA's data are used

SOUTHERN FEDERAL DISTRICT PHARMACY MARKET: 2022 FIRST SIX 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, based on the results for January-September of 2022 the average wage in SoFD was RUB 43424 (USD 615.68), which was 30% lower than the national average wage in Russia (RUB 61794).

According to the results of Retail Audit of OTC drugs in Russian Federation™, the sales of drugs in natural terms (+1%) showed an insignificant growth to 317.280 mil. packs in the first nine months of 2022 in the SoFD. In money terms, the market showed the more pronounced positive growth rates (+19%) both in rouble terms and in dollar terms (+27%), and reached RUB 73.111 bil. (USD 1.060 mil.) in wholesale prices (Fig. 1). The city market share accounted for 8.8% of the pharmacy sales in Russia. Based on the results for the first nine months of 2022, the average cost of a finished pharma product (FPP) pack was USD 4.12 at retail prices vs. USD 3.24 in a year-earlier period. In the analysed period, the average amount spent by residents of the SoFD for drugs amounted to USD 79.54.

Figure 1. SoFD pharmacy market for 9 months of 2021 – 9 months 2022.*



In the January-September period of 2022, the first three of the top 10 manufacturers in the market of the Southern Federal District remained unchanged (Table 1). BAYER (+13%) and OTCPHARM (+5%) kept their previous first two ranks despite the lag behind the growth rates, whereas STADA placed at rank three reinforced it due to 30% growth in sales. Note that markets of the other three manufacturers developed by priority rates: SERVIER (+21%), the newcomer BINNOPHARM (+57%) that broke into the ranks of the top ten ranking for the first time, as well as GLAXOSMITHKLINE (+25%) moved up to ranks four, seven and nine, respectively. They displaced SANOFI and ABBOTT (+8% each), whereas BERLIN-CHEMIE/MENARINI (+4%) moved down from rank seven to ten. TEVA (+10%) held its previous rank eight. In total, the top ten manufacturers accounted for 31.4% of the Russian market, whereas in the year– earlier period they had accounted for 32.0%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	**BAYER**	4.3	4.5
2	2	OTCPHARM	3.8	4.2
3	3	**STADA**	3.7	3.4
4	6	**SERVIER**	3.1	3.1
5	4	**SANOFI**	3.0	3.3
6	5	**ABBOTT**	2.9	3.2
7	11	BINNOPHARM GROUP	2.8	2.1
8	8	**TEVA**	2.6	2.8
9	10	**GLAXOSMITHKLINE**	2.6	2.4
10	7	**BERLIN-CHEMIE/MENARINI**	2.5	2.9
Total			31.4	32.0

*AIPM members are in bold

The leader of the top 10 brand names ranking changed: ARBIDOL (+21%) moved up to rank one from two (Table 2). ELIQUIS that used to be the ranking leader reduced its sales by 2% and moved down to rank two. XARELTO reduced its sales still more significantly, by 5%, however it held its previous rank three. HEPTRAL (-1%) showed reduction in sales and rating points, moving down to rank seven. In addition to the leader, INGAVIRIN (+30%) and NUROFEN (+5%) as well as the newcomer of the top ten THERAFLU (+47%) also made good progress, moving up to ranks four and five. At the same time, DETRALEX (+0,1%) and PENTALGIN (+6%) lost two ranks each and moved down to ranks six and ten, respectively. The brand ACTOVEGIN (+10%) continued to hold its previous rank nine. The top ten brands accumulated 7.9% of the regional market, whereas in the year-earlier period their share was 8.7%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	2	ARBIDOL	1.5	1.4
2	1	ELIQUIS	1.2	1.5
3	3	XARELTO	1.0	1.2
4	7	INGAVIRIN	0.7	0.7
5	6	NUROFEN	0.7	0.7
6	4	DETRALEX	0.7	0.8
7	5	HEPTRAL	0.6	0.8
8	16	THERAFLU	0.6	0.5
9	9	ACTOVEGIN	0.5	0.6
10	8	PENTALGIN	0.5	0.6
Total			7.9	8.7

* Here and elsewhere IQVIA's data are used

The top ten INN and grouping name ranking didn't change in composition and half of them held their previous ranks (Table 3). Three leaders are listed among them: UMIFENOVIR (+26%), XYLOMETAZOLINE (+27%) and APIXABAN (-2%), as well as BISOPROLOL (+19%) и ADEMETIONINE (+9%) rounding out the top ten ranking. Due to outperformance rates, the composition DIOSMIN* HESPERIDIN (+21%), INNs IBUPROFEN (+29%) and NIMESULIDE (+28%) moved up to ranks four through six, respectively. The less dynamic PANCREATIN (+3%) and RIVAROXABAN that reduced its sales by 5% moved down to ranks seven and eight, respectively. The total share of the top 10 ATC drugs decreased by 0.3 rating point to 11.6%.

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, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	UMIFENOVIR	1.7	1.6
2	2	XYLOMETAZOLINE	1.6	1.5
3	3	APIXABAN	1.2	1.5
4	6	DIOSMIN*HESPERIDIN	1.2	1.1
5	8	IBUPROFEN	1.1	1.0
6	7	NIMESULIDE	1.1	1.0
7	5	PANCREATIN	1.0	1.2
8	4	RIVAROXABAN	1.0	1.2
9	9	BISOPROLOL	0.9	0.9
10	10	ADEMETIONINE	0.8	0.8
Total			11.6	11.9

The markets of six ATC groups from the top ten ranking developed at a pace that was higher than the market average (Table 4). Among them were M01 Anti-inflammatory and antirheumatic products (+24%), which held their previous rank number one. The groups J05 Antivirals for systemic use (+21%), C09 Agents acting on the rennin-angiotensin system (+28%) and R01 Nasal preparations (+31%) improved their ranks by one rating point, whereas G03 Sex hormones (+37%) moved up from rank nine to six. At the same time, N02 Analgesics that showed a 21% growth in sales as before held their previous rank seven. C05 Vasoprotectives (+13%) also held their previous rank, rounding out the top ten ranking. The groups B01 Antithrombotic agents (-1%) and Antibacterials for systemic use (-11%), which moved down to ranks four and eight showed a decrease in sales and fell in the ranks. A07 Antidiarrheals (+12%) lost one rating point. The total share of the top 10 reduced from 38.7% to 38.0%.

Table 4. The top ten ATC groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
9 mon. 2022	9 mon. 2021			9 mon. 2022	9 mon. 2021
1	1	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.2	5.0
2	3	J05	ANTIVIRALS FOR SYSTEMIC USE	4.7	4.7
3	4	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	4.6	4.3
4	2	B01	ANTITHROMBOTIC AGENTS	4.1	4.9
5	6	R01	NASAL PREPARATIONS	3.7	3.4
6	9	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.5	3.0
7	7	N02	ANALGESICS	3.2	3.2
8	5	J01	ANTIBACTERIALS FOR SYST USE	3.1	4.2
9	8	A07	ANTIDIARR.,INTEST. ANTIINFL./ ANTI-INFECT. AGENTS	2.9	3.1
10	10	C05	VASOPROTECTIVES	2.8	3.0
Total				38.0	38.7

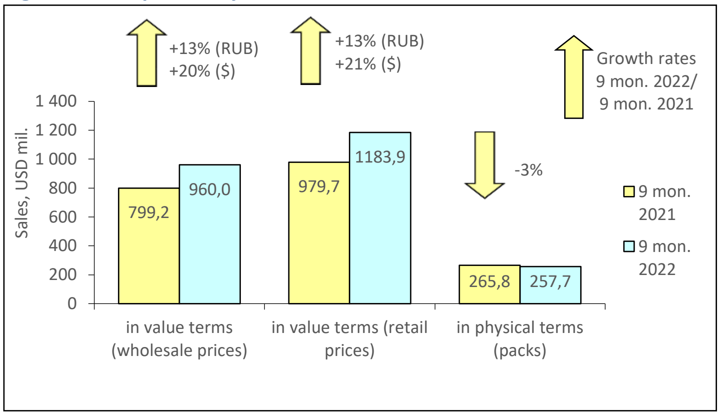
Conclusion. Based on the results for the first nine months of 2022, the pharmacy market of SoFD reached RUB 90.177 bil. (USD 1.307 mil.) at retail prices. At the same time, the sales increased by 19% in terms of roubles and 28% in terms of dollars. The regional pharmacies sold 317.280 mil. packs, which was 1% more than in the same period of 2021. The average cost of an FPP pack based on the results for January-September of the current year amounted to USD 4.12, which was more than in the previous year (USD 3.24), but remained lower than the national average (USD 4.52). In the analysed period, the average expenses of the SoFD residents for FPPs in the pharmacies were also lower than the national average (USD 79.54 vs. USD 100.95).

UFD PHARMACY MARKET: 2022 FIRST NINE 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 the first nine months of 2022 the average wage in the UFD region was RUB 65847 (USD 933.60), which was 6% higher than the average wage in Russia (RUB 61794).

According to the results of the Retail Audit of Finished Pharma Products (FPP) in Russian Federation™, at the end of January-September of 2022 the sales of drugs in physical terms in the pharmacies of UFD saw a 3% decrease to 257.713 mil. packs. In value terms, the market demonstrated positive growth rates: it increased by 13% in rouble terms and by 20% in dollar terms and reached RUB 66.675 bil. (USD 959.999 mil.) in wholesale prices (Fig. 1). The regional retail sales share accounted for 8.0% of all pharmacy sales in Russia. The average retail cost of an FPP pack in January-September of 2022 was USD 4.59 against USD 3.69 in the year-earlier period. For the first nine months of 2022, the average amount spent by residents of UFD for medications amounted to USD 96.29.

Figure 1. UFD pharmacy market for 9 months of 2021 – 9 months 2022.*



Most of the top ten manufacturers held its own in the ranking in the retail market of the Ural Federal District based on the results for January-September of 2022 (Table 1). These included the leaders of the top ten BAYER (+7%), OTCPHARM (+12%), STADA (+20%) and SANOFI (-3%). ABBOTT (+11%) and KRKA (+8%) held their previous ranks six and nine. Three manufacturers showed a rating progress. SERVIER (+16%) moved up from rank seven to five, GEDEON RICHTER (+18%) moved up from rank eight to seven, and the only newcomer GLAXOSMITHKLINE (+13%) moved up to the bottom rank in the top ten ranking. And only TEVA (-0.1%) that showed almost zero growth rates moved three ranks down, coming in at number eight. The total share of the top 10 drug manufacturers decreased from 32.7% to 31.9%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	**BAYER**	4.2	4.4
2	2	OTCPHARM	4.1	4.1
3	3	**STADA**	4.1	3.8
4	4	**SANOFI**	3.1	3.6
5	7	**SERVIER**	3.0	2.9
6	6	**ABBOTT**	2.9	2.9
7	8	GEDEON RICHTER	2.9	2.7
8	5	**TEVA**	2.8	3.2
9	9	**KRKA**	2.6	2.7
10	12	**GLAXOSMITHKLINE**	2.3	2.3
Total			31.9	32.7

*AIPM members are in bold

The leading five brands didn't change their ranks in the top ten brands ranking. ARBIDOL (+12%), XARELTO (-2%), ELIQUIS (+6%), DETRALEX (+14% and HEPTRAL (+1%) held their previous five ranks despite the variety of trends (Table 2). LORISTA (+15%) also continued to hold its previous rank ten. The more dynamic INGAVIRIN (+27%) and FEMOSTON (+52%) moved up to ranks six and eight, respectively. On top of that, the latter broke into the ranks of the top 10 ranking for the first time. In contrast, the remaining brands of the top ten fell in the ranks. The brands NUROFEN (+3%) and PENTALGIN (+16%) moved down to ranks seven and nine. The cumulative share of the top ten amounted to 6.8%, in the year-earlier period it was 6.9%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	ARBIDOL	1.1	1.2
2	2	XARELTO	0.9	1.1
3	3	ELIQUIS	0.8	0.8
4	4	DETRALEX	0.7	0.7
5	5	HEPTRAL	0.6	0.7
6	8	INGAVIRIN	0.6	0.5
7	6	NUROFEN	0.6	0.6
8	17	FEMOSTON	0.5	0.4
9	7	PENTALGIN	0.5	0.5
10	10	LORISTA	0.5	0.5
Total			6.8	6.9

As in the previous ranking, the upper part of the top-10 INNs and grouping names remained unchanged: INNs UMIFENOVIR and XYLOMETAZOLINE (+17% each), as well as the composition DIOSMIN*HESPERIDIN (+28%) held and strengthened their leading positions (Table 3). The less dynamic APIXABAN (+6%) and ADEMETIONINE (+8%) continued to hold the last two ranks. Among the remaining INNs, two INNs showed a rating progress: IBUPROFEN (+18%) and NIMESULIDE (+23%) moved up to ranks four and five. At the same time, PANCREATIN (+4%), RIVAROXABAN (-2%) and ROSUVASTATIN (+16%) moved down to ranks six through eight, respectively. The cumulative share of the top-10 didn't virtually change: 10,4% vs 10,3% 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, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	UMIFENOVIR	1.4	1.3
2	2	XYLOMETAZOLINE	1.4	1.3
3	3	DIOSMIN*HESPERIDIN	1.3	1.2
4	6	IBUPROFEN	1.1	1.0
5	8	NIMESULIDE	1.0	0.9
6	5	PANCREATIN	0.9	1.0
7	4	RIVAROXABAN	0.9	1.1
8	7	ROSUVASTATIN	0.9	0.9
9	9	APIXABAN	0.8	0.8
10	10	ADEMETIONINE	0.8	0.8
Total			10.4	10.3

In contrast to the previous top 10 rankings, the top ten ATC groups changed its leader (Table 4). M01 Anti-inflammatory and antirheumatic products (+20%) moved up to rank number one from two, displacing C09 Agents acting on the rennin-angiotensin system (+9%) down to rank two. G03 Sex hormones (+22%) continued to hold its previous rank three in the top ten ranking. Another group that maintained its positions was R01 Nasal preparations (+13%) placed at rank six. Just like the leader of the top ten, the other four ATC groups managed to rise in the ranks. J01 Antibacterials for systemic use (+18%) and N02 Analgesics (+19%) moved one rank up, coming in at numbers four and seven. C05 Vasoprotectives and N06 Psychoanaleptics (+17% each) improved their positions by two ranks, and the latter broke into the ranks of the top 10 for the first time. The less dynamic B01 Antithrombotic agents (+2%) and A11 Vitamins (+12%), in contrast, lost one rank each and moved down to ranks five and ten, respectively. In total, the top ten ATC groups accumulated 37.4% of the regional market, whereas in the year-earlier period they accounted for 36.7%.

Table 4. The top ten ATC groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
9 mon. 2022	9 mon. 2021			9 mon. 2022	9 mon. 2021
1	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.4	5.1
2	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.0	5.2
3	3	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.4	4.0
4	5	J05	ANTIVIRALS FOR SYSTEMIC USE	3.9	3.8
5	4	B01	ANTITHROMBOTIC AGENTS	3.5	3.8
6	6	R01	NASAL PREPARATIONS	3.4	3.4
7	8	N02	ANALGESICS	3.1	3.0
8	10	C05	VASOPROTECTIVES	2.9	2.8
9	11	N06	PSYCHOANALEPTICS	2.9	2.8
10	9	A11	VITAMINS	2.8	2.8
Total				37.4	36.7

Conclusion. In January-September period of 2022, the retail pharmacy market of the Ural Federal District brought in RUB 82.240 bil. (USD 1.184 bil.) at retail prices. The regional volume increased by 13% in terms of roubles, and 21% in terms of dollars. In pack terms, the market reduced by 3% and amounted to 257.713 mil. packs. According to the results for 9 months of 2022, the average cost of an FPP pack in the district pharmacies was USD 4.59, which was higher than the last year figure (USD 3.69), and the national average (USD 4.52). However, the average expenses of the UFD residents for medications in the pharmacies were lower than the national average (USD 96.29 vs. USD 100.95).

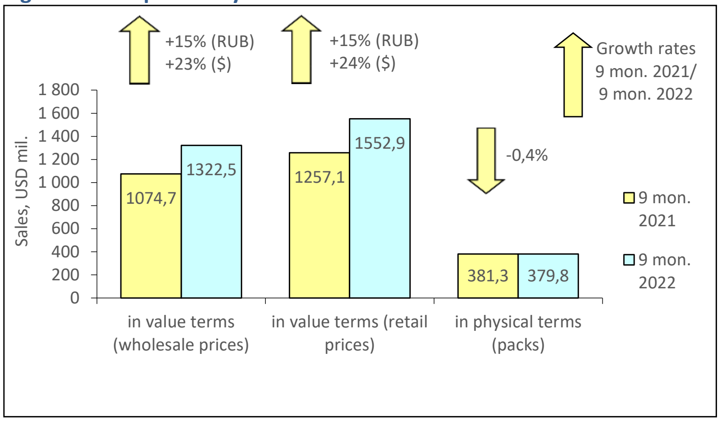
* Here and elsewhere IQVIA's data are used

SiFD PHARMACY MARKET: 2022 FIRST NINE 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-September of 2022 the average wage in the SiFD was RUB 54005 (USD 765.70), which was 13% lower than the national average wage in Russia (RUB 61794).

According to the results of the Retail Audit of OTC drugs in Russian Federation™, in the first three quarters of 2022 the SiFD pharmacy market volume reduced (-0.4%) insignificantly in physical terms and amounted to 379.847 mil. packs (Fig. 1). The sales in wholesale prices increased by 15% in terms of roubles and 23% in terms of dollars, reaching RUB 91.456 bil. (USD 1.323 bil). The district's share accounted for 10.5% of the total pharmacy sales in the Russian pharmacy market pattern. Based on the results for nine months of 2022, the average cost of FPP pack in the SiFD pharmacies was USD 4.09, whereas in the year-earlier period its cost was USD 3.30. In the analysed period, per capita expenses of the SiFD residents for purchase of medicines in pharmacies reached USD 91.94.

Figure 1. SiFD pharmacy market for 9 months of 2021 – 9 months 2022.*



BAYER (+8%) remained the leader of the top ten manufacturers on the pharmacy market of the Siberian Federal District based on the results for January-September of 2022, though due to legging growth rates it reduced its market share (Table 1). Due to 20% growth in sales, STADA moved up to rank two from three, displacing OTCPHARM (+11%) one rank down. The markets of another four INNs from the top ten ranking developed at a fast pace. SERVIER (+16%), KRKA (+19%) and GEDEON RICHTER (+18%) moved up to ranks four, five and nine, and the top ten newcomer and closer AKRIKHIN (+16%) moved up to rank ten. ABBOTT (+14%) improved its position by 2 p.p., moving up to rank eight from nine. At the same time, SANOFI that reduced its sales and TEVA (+5%) that reduced its sales, in contrast, moved down to ranks six and seven. The total share of the top ten manufacturers declined by almost 1 p.p. and accounted for 32.4%

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	**BAYER**	4.3	4.6
2	3	**STADA**	4.1	4.0
3	2	OTCPHARM	3.9	4.1
4	5	**SERVIER**	3.2	3.2
5	7	**KRKA**	3.2	3.1
6	4	**SANOFI**	3.0	3.6
7	6	**TEVA**	2.9	3.2
8	9	**ABBOTT**	2.8	2.8
9	10	GEDEON RICHTER	2.6	2.5
10	12	AKRIKHIN-PHARMA	2.4	2.3
Total			32.4	33.3

*AIPM members are in bold

The top five INNs in the top 10 brand ranking remained unchanged: ARBIDOL (+8%), ELIQUIS (+15%), XARELTO (+7%), DETRALEX (+16%) and LORISTA (+23%) continued to hold ranks one through five, respectively. The shifts took place in the lower part of the top ten. PENTALGIN (+21%) moved up to rank six from seven, displacing CARDIOMAGNYL (+6%) one rank down. The newcomers FEMOSTON (+54%) and THERAFLU (+36%) moved up to ranks eight and nine, pushing MEXIDOL (+7%) to the last rank. In total, the top ten brands accumulated 7.6% of the pharmacy sales, 7.5% 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, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	ARBIDOL	1.1	1.2
2	2	ELIQUIS	1.1	1.1
3	3	XARELTO	0.9	1.0
4	4	DETRALEX	0.8	0.7
5	5	LORISTA	0.7	0.7
6	7	PENTALGIN	0.7	0.6
7	6	CARDIOMAGNYL	0.6	0.7
8	18	FEMOSTON	0.6	0.4
9	14	THERAFLU	0.6	0.5
10	8	MEXIDOL	0.5	0.6
Total			7.6	7.5

The only newcomer ROSUVASTATIN (+18%) broke into the ranks of the top ten INN and grouping names ranking, moving up to number ten from 12 (Table 3). In addition, IBUPROFEN (+16%), NIMESULIDE (+22%) and PANCREATIN (+10%) also moved up to the higher positions, coming in at ranks five, seven and nine, respectively. At the same time, they displaced BISOPROLOL (+10%) and RIVAROXABAN (+7%) one rank down. XYLOMETAZOLINE (+16%), UMIFENOVIR (+10%), DIOSMIN* HESPERIDIN (+28%) and APIXABAN (+15%) kept their top four ranks in the ranking. The cumulative share did not change and accounted for 10.6%.

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, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	XYLOMETAZOLINE	1.4	1.4
2	2	UMIFENOVIR	1.3	1.4
3	3	DIOSMIN*HESPERIDIN	1.2	1.1
4	4	APIXABAN	1.1	1.1
5	6	IBUPROFEN	1.1	1.0
6	5	BISOPROLOL	1.0	1.1
7	8	NIMESULIDE	1.0	1.0
8	7	RIVAROXABAN	0.9	1.0
9	10	PANCREATIN	0.8	0.8
10	12	ROSUVASTATIN	0.8	0.7
Total			10.6	10.6

The top ten ATC groups changed its leader: M01 Anti-inflammatory and antirheumatic products (+20%) moved up to rank number one from two, displacing C09 Agents acting on the rennin-angiotensin system (+15%) down to rank two (Table 4). The other three ATC groups took yet higher rating positions. N02 Analgesics (+24%) and C05 Vasoprotectives (+18%) moved one rank up, coming in at numbers five and eight, whereas the newcomers of the top ten N06 Psychoanaleptics (+19%) moved up to rank nine. At the same time, the group J05 Antivirals for systemic use (+14%), in contrast, lost one rating point. G03 Sex hormones (+22%), B01 Antithrombotic agents (+8%), R01 Nasal preparations (+18%) and R05 Cough and cold preparations (+10%) continued to hold their previous positions. The commutative share of the top ten ATC groups expanded from 37.1% to 37.7%.

Table 4. The top ten ATC groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
9 mon. 2022	9 mon. 2021			9 mon. 2022	9 mon. 2021
1	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.5	5.2
2	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.4	5.4
3	3	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.4	4.1
4	4	B01	ANTITHROMBOTIC AGENTS	3.7	4.0
5	6	N02	ANALGESICS	3.6	3.3
6	5	J05	ANTIVIRALS FOR SYSTEMIC USE	3.5	3.6
7	7	R01	NASAL PREPARATIONS	3.4	3.3
8	9	C05	VASOPROTECTIVES	2.9	2.9
9	12	N06	PSYCHOANALEPTICS	2.7	2.6
10	10	R05	COUGH AND COLD PREPARATIONS	2.7	2.8
Total				37.7	37.1

Conclusion. At the end of nine months of 2022, the pharmacy market in the Siberian Federal District was estimated at RUB 107.362 bil. (USD 1.553 bil.) at final consumer prices. At the same time, the market behaviour was positive both in rouble (+15%) and in dollar (+24%) terms. In natural terms, the sales decreased by 0.4% and amounted to 379.847 mil. packs. The average cost of an FPP pack increased as compared to a year earlier (USD 4.09 vs. USD 3.30), but continued to be lower than the national FPP price average in Russia (USD 4.52). Per capita expenses of the district residents for purchase of medicines in the pharmacies were also lower than the national average figures (USD 91.94 vs. USD 100.95).

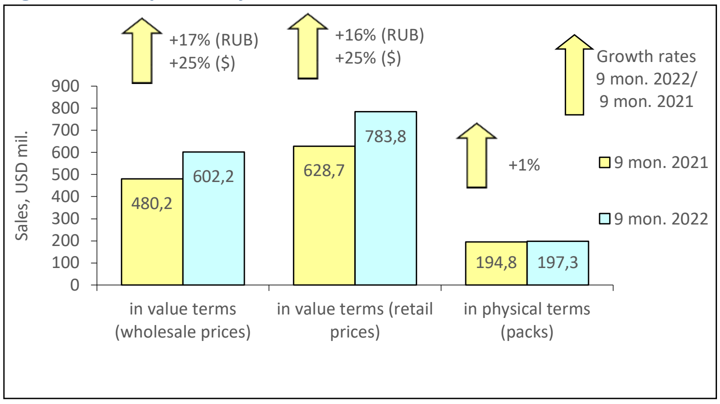
* Here and elsewhere IQVIA's data are used

FEFD PHARMACY MARKET: 2022 FIRST NINE 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 the Federal State Statistics Service, the average wage in Far Eastern FD based on the results for January-September of 2022 was RUB 70966 (USD 1006.18), which was 15% higher than the average wage in Russia (RUB 61794).

According to the results of the Retail Audit of Finished Pharma Products (FPP) in Russian Federation™, at the end of 9 months of 2022 the sales of drugs in natural terms in the pharmacies of FEFD saw a 1% increase to 197.296 mil. packs. In money terms, the market expanded by 17% in terms of roubles, and 25% in terms of dollars. At the same time, the volume of the market amounted to RUB 41.638 bil. (USD (602.153 mil.) at wholesale prices (Fig. 1). The district's share accounted for 5.3% of the all-Russia sales in retail prices. The average cost of a pack increased as compared to a year earlier period (USD 3.23) and was equal to USD 3.97. The average amount spent by the residents of the FEFD region for drugs in the pharmacies for nine months of 2022 amounted to USD 96.88.

Figure 1. FEFD pharmacy market for 9 months of 2021 – 9 months 2022.*



The top ten manufacturers ranking in the FEFD OTC market based on the results for January-September of 2022 didn't change in composition (Table 1). At the same time, only BAYER (+7%) and KRKA (+11%) that were placed at ranks number one and four held their own in the ranking. Four manufacturers improved their ratings. STADA (+22%), SERVIER (+17%) and GLAXOSMITHKLINE (+18%) moved one rank up, to numbers two, five and nine, whereas GEDEON RICHTER (+15%) moved up from rank nine to six. In addition, they displaced OTCPHARM (+18%) and SANOFI (+7%) one rank down, whereas TEVA (+10%) and SANDOZ (-0.5%) lost two rating points each. The cumulative share of the top-ten reduced by 1.4 p.p. and achieved 33.4%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	**BAYER**	4.4	4.8
2	3	**STADA**	4.3	4.1
3	2	OTCPHARM	4.2	4.2
4	4	**KRKA**	3.2	3.4
5	6	**SERVIER**	3.2	3.2
6	9	GEDEON RICHTER	3.0	3.1
7	5	**TEVA**	3.0	3.2
8	7	**SANOFI**	2.9	3.2
9	10	**GLAXOSMITHKLINE**	2.7	2.7
10	8	**SANDOZ**	2.6	3.1
Total			33.4	34.8

*AIPM members are in bold

Half of the top-10 brands held their own in the ranking (Table 2). These were the leaders ARBIDOL (+26%), XARELTO (+10%), ELIQUIS (+22%) and NUROFEN (+18%), and MIRAMISTIN (+23%) rounding out the top ten ranking. The more dynamic THERAFLU (+45%) and INGAVIRIN (+43%) moved up to ranks five and seven. Note that the latter became the only newcomer of the top ten. At the same time, the brands DETRALEX (+19%), CARDIOMAGNYL (+14%) and LORISTA (+4%) lost one rating point each. The aggregate share of the top-10 expended from 8.2% to 8.5%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	ARBIDOL	1.6	1.5
2	2	XARELTO	1.0	1.1
3	3	ELIQUIS	0.9	0.9
4	4	NUROFEN	0.8	0.8
5	8	THERAFLU	0.8	0.6
6	5	DETRALEX	0.8	0.7
7	11	INGAVIRIN	0.7	0.6
8	7	CARDIOMAGNYL	0.7	0.7
9	6	LORISTA	0.6	0.7
10	10	MIRAMISTIN	0.6	0.6
Total			8.5	8.2

UMIFENOVIR (+27%), XYLOMETAZOLINE (+23%) and IBUPROFEN (+22%) remained the leaders of the top ten INN and grouping names ranking (Table 3). Three bottom INNs closing the top ten ranking, within which were PANCREATIN (+19%), APIXABAN (+22%) and DICLOFENAC (+7%), did not change either. Two INNs managed to move one rank up: the composition DIOSMIN*HESPERIDIN (+19%) and INN NIMESULIDE (+30%) moved up to ranks four and six, displacing RIVAROXABAN (+10%) and BISOPROLOL (+16%) one rank down. The cumulative share of the top-10 expended from 11.1% to 11.3%.

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, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	UMIFENOVIR	1.8	1.7
2	2	XYLOMETAZOLINE	1.6	1.6
3	3	IBUPROFEN	1.3	1.3
4	5	DIOSMIN*HESPERIDIN	1.1	1.1
5	4	RIVAROXABAN	1.0	1.1
6	7	NIMESULIDE	1.0	0.9
7	6	BISOPROLOL	1.0	1.0
8	8	PANCREATIN	0.9	0.9
9	9	APIXABAN	0.9	0.9
10	10	DICLOFENAC	0.7	0.8
Total			11.4	11.1

M01 Anti-inflammatory and antirheumatic products (+23%) and C09 Agents acting on the rennin-angiotensin system (+27%) and J05 Antivirals for systemic use (+27%) remained the bestselling ATC groups in the regional market (Table 4). They were followed by G03 Sex hormones and R01 Nasal preparations (+22% each), which improved their positions by one point. N02 Analgesics (+26%) and R05 Cough and cold preparations (+29%) moved one rank up, coming in at numbers seven and nine. In contrast, three groups with rates lagging behind growth B01 Antithrombotic agents (+11%), J01 Antibacterials for systemic use (+7%) and C05 Vasoprotectives (+12%) moved down to ranks six, eight and ten, respectively. The total share of the analysed ranking accounted for 38.0% against 37.2% 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, %	
9 mon. 2022	9 mon. 2021			9 mon. 2022	9 mon. 2021
1	1	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.2	5.0
2	2	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	4.9	4.9
3	3	J05	ANTIVIRALS FOR SYSTEMIC USE	4.4	4.0
4	5	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.9	3.7
5	6	R01	NASAL PREPARATIONS	3.7	3.6
6	4	B01	ANTITHROMBOTIC AGENTS	3.6	3.9
7	8	N02	ANALGESICS	3.4	3.1
8	7	J01	ANTIBACTERIALS FOR SYST USE	3.1	3.4
9	10	R05	COUGH AND COLD PREPARATIONS	3.1	2.8
10	9	C05	VASOPROTECTIVES	2.7	2.8
Total				38.0	37.2

Conclusion. In January-September of 2022, the pharmacy market of the Far Eastern Federal District brought in RUB 54.178 bil. (USD 783.849 mil.). which was 16% in terms of roubles and 25% in terms of dollars more than in the same period of 2021. In physical terms, the market extended by 1% and amounted to 197.92 mil. packs. The average cost of OTC pack in the FEFD pharmacies according to the results for the first nine months of 2022 was USD 3.97, which was higher than the 2021 figure (USE 3.23), but less than the average across the country (USD 4.52). The average drug expenses of the district residents were also lower than the national average expenses in Russia (96.88 USD vs. 100.95 USD).

* Here and elsewhere IQVIA's data are used