Ассоциация Международных Фармацевтических Производителей

JOINT ANALYTICAL REPORT
of Associations of International Pharmaceutical Manufacturers and CG "Remedium"

MACROECONOMIC INDICES

Inflation

According to Federal State Statistics Service's data, the Consumer Price Index was estimated as 100.5% in February 2023 compared to the previous month, and 101.3% as compared to December, 2022.

In February 2023, Industrial Producer Price Index was 100.9% as compared to the previous month, in the month-earlier period it had amounted to 99.1%. The index accounted for 100.0% as against December 2022.

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

Source: Rosstat

Living standard

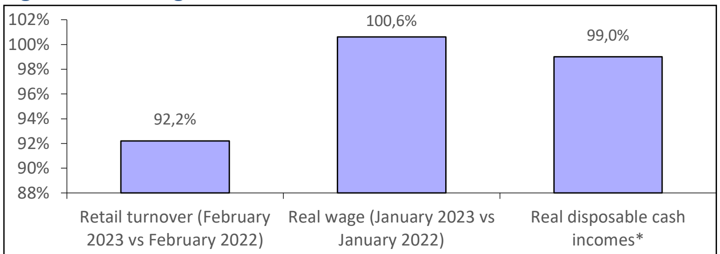
In January 2023, a gross monthly average wage of corporate employees reached RUB 63260 (USD 913.77). It increased by 112.4% compared to January 2022, and 71.5% compared to the previous period. In January 2023, the real gross wage accounted for 100.6% as compared to January 2022, and 70.9% against the prior period.

According to estimates[1], real disposable cash incomes decreased by 99.0% in 2022 as compared to 2021 (Fig. 2).

Retail turnover

In February 2023, the retail turnover was equal to RUB 3333.8 bil. or 92.2% (in comparable prices) against the respective period of the previous year, and RUB 6706.5 bil. or 92.8% in January - February 2023 (Fig. 2).

Figure 2. Real wage and retail turnover



Source: Rosstat

* January-December 2022 vs. January-December 2021.

Industrial Production

According to Federal State Statistics Service's data, Industrial Production Index accounted for 98.3% in February 2023 compared to the same period in the previous year, and 98.0% as compared to January-February, 2023.

According to Federal State Statistics Service's data, Industrial Production Index of drugs and medical products in February 2023 accounted for 78% compared to the relevant period of 2022 and 84.9% in January-February, 2023.

Domestic production

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

Table 1. The top ten Russian chemical and pharmaceutical manufacturers by sales volume in February 2023

Rank	Manufacturer	RUB mil.
1	Stada	2839.2
2	Otcpharm	2717.2
3	Binnopharm	2543.4
4	Biocad	2249.3
5	Pharmstandart	2195.2
6	Generium	2042.6
7	Valenta	1863.8
8	Servier	1756.8
9	Vertex	1732.2
10	Grotex	1713.2

Source: IQVIA

Table 2 provides pharmacy sales data from 10 regions of the Russian Federation. In January 2023 compared to December 2022, growth in sales (in terms of roubles) was observed in all regions. The most significant reduction was observed in Moscow (-37%), and the least significant - in Perm (-12%).

Table 2. Pharmacy sales in the regions, 2022-2023

Region	Pharmacy sales, $ mil. (wholesale prices)			Growth gain, % (roubles)		
	November 2022	December 2022	January 2023	November/October 22	December /November 22	January 23/ December 22
Moscow	264.4	301.1	178.9	11%	23%	-37%
St. Petersburg	105.3	133.1	87.0	4%	37%	-31%
Krasnodar Krai	77.4	74.2	59.4	13%	4%	-15%
Krasnoyarsk Krai	34.7	43.4	30.9	0.2%	35%	-25%
Tatarstan	37.2	40.9	30.5	5%	19%	-21%
Rostov Region	40.9	47.9	35.1	2%	27%	-22%
Novosibirsk Region	33.7	42.2	27.2	-0.2%	36%	-32%
Voronezh Region	27.6	32.3	22.1	10%	27%	-28%
Perm	10.7	12.4	10.4	-8%	25%	-12%
Tyumen	12.7	15.6	10.6	-4%	33%	-28%

Advertising

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

Table 3. Top five advertisers in mass media in February 2023

Rank	Company*	Amount of broadcasts
1	Materia Medica	10,833
2	Otcpharm	9,966
3	Binnopharm Group	8,786
4	Stada	4,701
5	Evalar	4,196

Source - Remedium according to Mediascope's data

Table 4. Top five brand names in mass media in February 2023

Rank	Brand*	Amount of broadcasts
1	Evalar	4,322
2	Renewal	3,456
3	Trekrezan	2,682
4	Rafamin	2,544
5	Kagocel	2,327

Source - Remedium according to Mediascope's data

* Only drugs registered with the 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 RESULTS

According to DLO in RF™, the drug supplies under the Federal Program amounted to RUB 130.451 bil. on the basis of the results for 2022 (USD 1.875 bil.) at contractual prices. The sector volume expanded by 14% in terms of roubles and 21% in terms of dollars as compared to 2021. The scope of supplies in pack terms increased by 2% to 66.230 mil. packs. The average cost of an FPP pack through the DLO program was USD 28.31 in contractual prices (a year ago it was USD 23.81).

At end of 2022, the top ten manufacturers in the DLO segment turned out to be highly stable: six of its representatives held their own in the ranking (Table 1). GENERIUM (+13%[2]) and TAKEDA (+4%) kept their leading positions, and BIOCAD (+11%), NOVARTIS (+32%), SANOFI (-11%) and OCTAPHARMA (-5%) kept their previous ranks from six through nine, respectively. ROCHE that showed 60% growth in sales moved up from rank five to three, displacing JOHNSON & JOHNSON (+19%) and CELGENE (-1%) one rank down. The newcomer BOEHRINGER (+30%) rounded out the top ten ranking. The total share of the top ten drug manufacturers under DLO Programme expanded by slightly more than 2 p.p. to 64.2%.

Table 1. The top 10 drug manufacturers for DLO*

Rank in the top ten		Manufacturer*	Share in total DLO volume, %	
2022	2021		2022	2021
1	1	GENERIUM ZAO RF	11.5	11.6
2	2	**TAKEDA**	10.8	10.1
3	5	**ROCHE**	9.4	6.7
4	3	JOHNSON & JOHNSON	7.7	7.4
5	4	CELGENE	6.0	6.9
6	6	BIOCAD RF	6.0	6.2
7	7	**NOVARTIS**	5.0	4.3
8	8	**SANOFI**	2.8	3.6
9	9	OCTAPHARMA	2.6	3.1
10	11	**BOEHRINGER I**	2.2	2.0
Total			64.2	62.0

*AIPM members are in bold

One newcomer broke into the top ten brands ranking (Table 2). TEBERIF (+60%) moved up to rank eight. In addition, the markets of the other five brands, of which four demonstrated the rating progress, developed at a fast pace: OCREVUS (+48%), HEMLIBRA (2.1-fold growth in purchases), ELAPRASE (+40%) and DARZALEX (+31%) moved up to rank two and four through six, respectively. Despite outstripping growth rates, the brand ELIZARIA (+24%) lost one ranking point, being moved by more dynamic brand. In contrast, the remaining brands of the top 10 reduced their purchases under the programme. Among them was REVLIMIDE (-1%), which held its leadership position. Purchases of ADVATE and TYSABRI reduced by 1% and those of OCTOFACTOR - by 5%, and at the year-end these brands moved down to ranks seven, nine and ten. The total share of the top 10 ranking grew from 32.0% to 34.6%.

Table 2. The top 10 Brands in DLO segment

Rank in the top ten		Brand	Share in total DLO volume, %	
2022	2021		2022	2021
1	1	REVLIMIDE	6.0	6.9
2	3	OCREVUS	4.6	3.5
3	2	ELIZARIA	4.2	3.9
4	10	HEMLIBRA	3.6	1.9
5	6	ELAPRASE	3.4	2.8
6	7	DARZALEX	3.0	2.6
7	4	ADVATE	3.0	3.4
8	11	TEBERIF	2.4	1.7
9	5	OCTOFACTOR	2.4	2.8
10	8	TYSABRI	2.1	2.4
Total			34.6	32.0

Just as the corresponding brand, LENALIDOMIDE (+11%) continued to hold rank number one in the top 10 INN and group names ranking (Table 3). The remaining INNs of the top 10 INN ranking changed their ranks; moreover, five of them improved them. OCRELIZUMAB (+48%) moved up to rank two from four, and the newcomer EMICIZUMAB broke into the top ten ranking, coming in at number four (2.1-fold growth in purchases). INTERFERON BETA-1A (+31%), IDURSULFASE (+40%) and DARATUMUMAB (+31%) moved up to ranks five through seven, respectively. Despite the strong positive growth rates, ECULIZUMAB (+24%) lost one rank and moved down to rank three. Due to reduction of purchases, OCTOCOG ALFA (-5%), MOROCTOCOG ALFA (-5%) and FACTOR VIII (-33%) fell in the ranks. The total share of the top 10 increased by almost 2 p.p. and accounted for 36.7%.

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	6.7	6.9
2	4	OCRELIZUMAB	4.6	3.5
3	2	ECULIZUMAB	4.2	3.9
4	13	EMICIZUMAB	3.6	1.9
5	7	INTERFERON BETA-1A	3.6	3.2
6	9	IDURSULFASE	3.4	2.8
7	10	DARATUMUMAB	3.0	2.6
8	6	OCTOCOG ALFA	3.0	3.4
9	8	MOROCTOCOG ALFA	2.4	2.8
10	3	FACTOR VIII	2.2	3.7
Total			36.7	34.8

Eight of the top ten ATC groups held their own in the top ten ATC groups ranking (Table 4). L04 Immunosuppressants (+20%) held and reinforced their leadership in the ranking. The groups B02 Antihemorrhagics (+12%), L01 Antineoplastic agents (+13%), A10 Drugs used in diabetes (0%), L03 Immunostimulants (+27%), A16 Other alimentary tract and metabolism products (+23%), B01 Antithrombotic agents (+37%) and R03 Drugs for obstructive airway diseases (+4%) continued to hold their previous ranks two through eight, respectively. Note that three from the above groups L03, A16 and B01 improved their positions due to outstripping growth rates. The newcomers L02 Endocrine therapy (+15%) and R05 Cough and cold preparations (+13%) broke into the top ten ranking, moving up to two bottom ranks. The total share of the top ten ranking expanded from 87.1% to 88.6%.

Table 4. The top ten ATC groups in DLO segment

Rank in the top ten		ATC code	ATC group	Share in total DLO volume, %	
2022	2021			2022	2021
1	1	L04	IMMUNOSUPPRESSANTS	27.6	26.2
2	2	B02	ANTIHEMORRHAGICS	18.5	18.9
3	3	L01	ANTINEOPLASTIC AGENTS	11.1	11.2
4	4	A10	DRUGS USED IN DIABETES	8.1	9.2
5	5	L03	IMMUNOSTIMULANTS	7.9	7.1
6	6	A16	OTHER ALIMENTARY TRACT AND METABOLISM PRODUCTS	7.3	6.7
7	7	B01	ANTITHROMBOTIC AGENTS	3.3	2.8
8	8	R03	DRUGS FOR OBSTRUCTIVE AIRWAY DISEASES	2.1	2.3
9	11	L02	ENDOCRINE THERAPY	1.3	1.3
10	12	R05	COUGH AND COLD PREPARATIONS	1.3	1.3
Total				88.6	87.1

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. They were Moscow Region (+16%), St. Petersburg (+18%), Chelyabinsk (+33%) and Rostov region (+32%). In Bashkortostan, purchases decreased by 4% compared to the last year. The cumulative share of the top 10 regions decreased from 42.0% to 41.2%.

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

Rank in the top ten		Region	Share in total DLO volume, %	
2022	2021		2022	2021
1	1	Moscow	11.6	12.2
2	2	Moscow Region	5.1	5.1
3	3	Saint Petersburg	4.7	4.5
4	4	Sverdlovsk Region	3.7	3.9
5	5	Krasnodar Region	3.0	3.3
6	6	Tatarstan Republic	2.9	3.0
7	7	Novosibirsk Region	2.5	2.7
8	8	Bashkortostan Republic	2.3	2.7
9	9	Chelyabinsk Region	2.9	2.5
10	10	Rostov Region	2.7	2.3
Total			41.2	42.0

Conclusion. On the basis of the results for 2022, the DLO segment brought in RUB 130.451 bil. (USD 1.875 bil.) in contractual prices, which is by 14% in terms of roubles and by 21% in terms of dollars more than in 2021. In pack terms, the supplies under the program increased by 2% to 66.230 mil. packs. The average cost of FPP included in the DLO Programme increased as compared to the previous year (USD 28.31 vs USD 23.81).

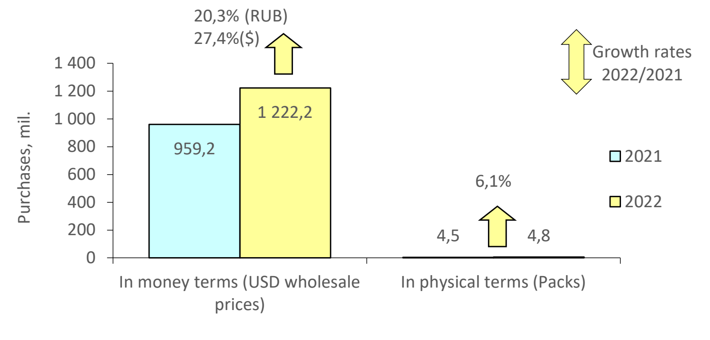
[2] Hereinafter, unless otherwise stated, growth gains are stated in the rouble equivalent or national currency.

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

2022 COST DEMANDING NOSOLOGIES (VZN) PROGRAM

According to IQVIA, at the year-end 2022 the volume of supplies under the VZN program in contract prices amounted to RUB 85.5 bil. (USD 1.2 bil.) (Fig. 1). The purchases saw a 20.3% decrease in terms of national currency and a 27.4% increase in terms of dollars as compared to the same period of the previous year. In natural terms, the supplies increased by 6.1% to 4.8 mil. packs.

Figure 1. VZN Program supplies trend in 2022 vs 2021*



The groups of drugs to treat Gaucher's disease (+42%), multiple sclerosis (+33%) and systemic-onset juvenile arthritis (+31%) showed the largest increase in purchases in terms of roubles as compared to 2021. The groups of drugs used in transplantation (+0.3%) and for the treatment of multiple sclerosis (+11.5%) showed the least increase in purchases. At the year-end 2022, the group of drugs to treat haemophilia continued as the leader in the purchases ranking, the drugs to treat multiple sclerosis and oncohematological drugs moved to ranks two and three, respectively.

Table 1. Supplies pattern under the VZN Program

Nosologies	INN	Share in total VZN supplies (RUB), % 2022	2021
Haemophilia		**28.0**	**30.1**
	EMICIZUMAB	5.5	3.1
	OCTOCOG ALFA	4.5	5.5
	FACTOR VIII*FACTOR VON WILLEBRAND	3.9	6.0
	MOROCTOCOG ALFA	3.6	4.6
	FACTOR VIII INHIBITOR BYPASSING FRACTION	2.5	2.5
	EPTACOG ALFA (ACTIVATED)	2.1	2.4
	FACTOR VIII	2.0	3.5
	FACTOR IX	1.3	1.6
	SIMOCTOCOG ALFA	1.2	0.4
	EFMOROCTOCOG ALFA	0.8	0.0
	NONACOG ALFA	0.5	0.5
Sclerosis Multiplex		**25.8**	**23.4**
	OCRELIZUMAB	7.0	5.7
	INTERFERON BETA-1A	5.5	5.1
	NATALIZUMAB	3.1	3.8
	INTERFERON BETA-1B	2.9	2.6
	PEGINTERFERON BETA-1A	2.4	2.3
	TERIFLUNOMIDE	1.6	1.9
	CLADRIBINE	1.4	0.0
	GLATIRAMER ACETATE	1.2	1.3
	ALEMTUZUMAB	0.8	0.8
Oncohematology		**21.7**	**22.0**
	LENALIDOMIDE	10.3	11.2
	DARATUMUMAB	4.6	4.2
	RITUXIMAB	3.1	5.3
	POMALIDOMIDE	1.5	0.0
	IXAZOMIB	1.2	0.0
	BORTEZOMIB	0.6	0.8
	IMATINIB	0.3	0.3
	FLUDARABINE	0.1	0.2
Mucopolysaccharidosis type I, II and VI		**8.2**	**8.3**
	IDURSULFASE	5.2	4.5
	GALSULFASE	1.7	2.2
	LARONIDASE	0.8	1.0
	IDURSULFASE BETA	0.5	0.7
Hemolytic-uremic syndrome		**6.4**	**6.3**
	ECULIZUMAB	6.4	6.3
Systemic-onset juvenile arthritis.		**2.8**	**2.5**
	CANAKINUMAB	2.1	2.0
	TOCILIZUMAB	0.6	0.5
	ETANERCEPT	0.0	0.0
	ADALIMUMAB	0.0	0.0
Transplantation		**2.7**	**3.3**
	TACROLIMUS	1.6	2.0
	MYCOPHENOLIC ACID	0.6	0.7
	EVEROLIMUS	0.3	0.3
	CICLOSPORIN	0.2	0.2
	MYCOPHENOLATE MOFETIL	0.1	0.1
Gaucher disease		**2.2**	**1.9**
	IMIGLUCERASE	1.4	1.2
	VELAGLUCERASE ALFA	0.8	0.7
	TALIGLUCERASE ALFA	0.0	0.0
Mucoviscidosis		**1.8**	**2.0**
	DORNASE ALFA	1.8	2.0
Pituitary dwarfism		**0.2**	**0.2**
	SOMATROPIN	0.2	0.2

Just like in the previous two years, Generium held its previous rank number one in the top ten manufacturers ranking (Table 3). The total supplies of the company's drugs in value terms increased by 13%. Elizaria (Eculizumab) (+24%) for the treatment of atypical haemolytic uremic syndrome provided a 50% increase in supplies. Elizaria moved up to rank three in the top ten brand ranking (Table 2). The top ten also included Octofactor, a recombinant factor VIII, which, due to negative growth rates, moved from rank 5 to 9 in the ranking. Takeda corporation that has gained the lead since 2019 due to acquisition of Shire, a developer of many orphan brands, traditionally held rank two in the top ten manufacturers ranking. Purchases of Takeda drugs increased by 22%, while the share in the supply profile remained at the level of 16% (Table 3). A three-quarter increase in supplies was boosted by Elaprase (Idursulfase) for the treatment of mucopolysaccharidosis II (+40%), as well as purchases of Ninlaro (Ixazomib) for the treatment of multiple myeloma included for the first time in the program. In addition to Elaprase (rank 5), the top 10 brands also included the recombinant coagulation factor VIII Advate (Octocog alfa), which moved from rank 4 to 7 (Table 2). In 2022, Roche moved up to rank three in the manufacturers ranking (Table 3). Supply volumes increased by 69%, and a market share increased from 9.5% to over 13%. A 55% increase in company's sales was boosted by the immunomodulator Hemlibra (Emicizumab) for the treatment of haemophilia A, and a 42% increase - by Ocrevus (Ocrelizumab) for the treatment of multiple sclerosis. Both drugs were included in the program for the first time a year ago, and both have significantly improved their positions in the brands ranking (Table 2). Ocrevus (+48%) moved up to rank 2, and Hemlibra (+115%) to rank 4.

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

Rank in the top ten		Brand	Share in total VZN supplies, % 2022	2021
1	1	REVLIMIDE	9.2	11.2
2	3	OCREVUS	7.0	5.7
3	2	ELIZARIA	6.4	6.3
4	10	HEMLIBRA	5.5	3.1
5	6	ELAPRASE	5.2	4.5
6	7	DARZALEX	4.6	4.2
7	4	ADVATE	4.5	5.5
8	11	TEBERIF	3.6	2.7
9	5	OCTOFACTOR	3.6	4.6
10	8	TYSABRI	3.1	3.8
Total			52.8	52.3

J&J (+19%) held its previous rank 4 for the third consecutive year (Table 3). Supplies of Darzalex (Daratumumab) for the treatment of multiple myeloma increased by 31%. The drug accounted for 45% of all company sales and moved up from rank 7 to 6 in the top ten brands ranking (Table 2). Tysabri (Natalisumab) and Plegridy (Peginterferon beta-1a) for the treatment of multiple sclerosis (+27%) provided the rest of J&J's sales. Despite the fact that Tysabri showed no increase in supplies, this drug still remained in the top 10 ranking (Table 2). Celgene, which has been ranked 3rd in the ranking since 2019 (and before that headed it for a long time), ended up in rank 5 in 2022 (Table 2). Revlimid (Lenalidomide) topped the brand ranking while reducing the share from 11% to 9% (Table 3). Biocad (+15%) held its previous rank 6 in the top ten manufacturers ranking (Table 2). Teberif (Interferon beta-1a) for the treatment of multiple sclerosis with a 60% increase in its supplies, moved up in the brand ranking from rank 11 to 8 (Table 1). 2).

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

Rank in the top ten		Manufacturer*	Share in total VZN supplies, % 2022	2021
1	1	GENERIUM ZAO RF	17.6	18.7
2	2	**TAKEDA**	16.3	16.0
3	5	**ROCHE**	13.3	9.5
4	4	JOHNSON & JOHNSON	10.1	10.3
5	3	CELGENE	9.2	11.2
6	6	BIOCAD RF	8.1	8.5
7	7	OCTAPHARMA	3.9	4.8
8	9	**NOVARTIS**	2.5	2.3
9	13	CINNAGEN CO	1.8	1.6
10	8	**CSL BEHRING GMBH**	1.8	2.3
Total			84.5	85.8

*AIPM members are in bold

Conclusion: the share of Russian drugs in the VZN segment profile in physical terms continued to grow from 47% to almost 50%. In terms of roubles, it amounted to about 32%, showing only a slight increase. Most of them are full-cycle drugs (including APIs). The share of imported non-localized drugs in the foreign product supplies profile increased in 2022.

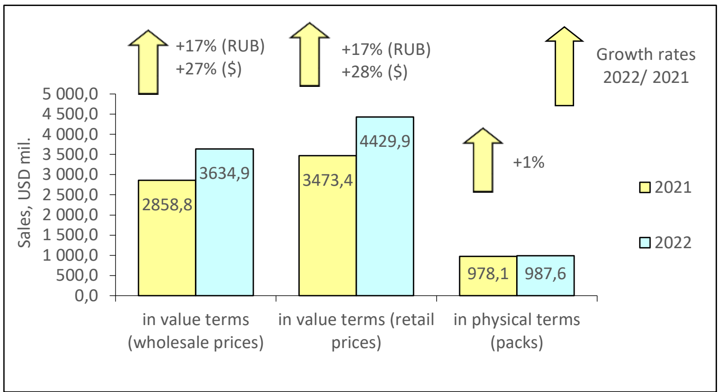
* Here and elsewhere IQVIA's data are used

CFD PHARMACY MARKET (WITHOUT MOSCOW): 2022 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, in 2022 the average wage in the CFD (inclusive of Moscow) was RUB 81381 (USD 1188.39), which was 27% higher than the average wage in Russia (RUB 64191).

According to the results of the Retail Audit of Finished Pharma Products (FPP) in Russian Federation™, at the end of 2022 the sales of drugs in physical terms in the CFD (without Moscow) saw a 1% increase to 987.601 mil. packs. In value terms, the market saw a 17% increase in terms of roubles and 27% in terms of dollars. At the same time, its volume reached RUB 245.244 bil. (USD 3.635 bil.) at wholesale prices (Fig.1). The region market share accounted for 19.6% of the Russian pharmacy retail sales. The average cost of a pack increased as compared to 2021 and was equal to USD 4.49 against USD 3.55 at retail prices. At year-end of 2022, the average amount spent by the residents of the region for FPPs in the pharmacies amounted to USD 167.36.

Figure 1. CFD (exc. of Moscow) pharmacy market in 2021 – 2022*



At year-end 2022 BAYER (+5%) continued to be the leader among the top ten manufacturers in the market of the Central Federal District (exclusive of Moscow), although its market share has noticeably decreased due to lagging behind the growth rates (Table 1). The most dynamic manufacturer of the top ten STADA (+23%) moved up to rank four, displacing OTCPHARM (+7%). Another three manufacturers developed their markets by outstripping rates: SERVIER (+19%) and KRKA (+22%) moved up to ranks four and six, and newcomer AKRIKHIN (+36%) broke into the top ten, rounding it out. At the same time, SANOFI (+3%) and SANDOZ (+7%), in contrast, moved down to ranks five and seven. BERLIN-CHEMIE/MENARINI (+10%) and ABBOTT (+9%) retained their ranks eight and nine. The cumulative share of the top ten reduced by 1.1 p.p. and accounted for 32.6%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
2022	2021		2022	2021
1	1	**BAYER**	4.6	5.1
2	3	**STADA**	4.1	3.9
3	2	OTCPHARM	3.6	3.9
4	6	**SERVIER**	3.3	3.2
5	4	**SANOFI**	3.2	3.7
6	7	**KRKA**	3.2	3.1
7	5	**TEVA**	3.0	3.2
8	8	**BERLIN-CHEMIE/MENARINI**	2.7	2.9
9	9	**ABBOTT**	2.6	2.8
10	13	BINNOPHARM GROUP	2.3	2.0
Total			32.6	33.7

*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). XARELTO (-8%), ELIQUIS (-2%), ARBIDOL (-4%), INGAVIRIN (+12%), DETRALEX (+11%) and MEXIDOL (+5%) held the first six ranks. Two shifts took place in the lower part of the top-10 ranking. NUROFEN (+6%) and PENTALGIN (+17%) moved up one rank, coming in at numbers seven and nine, displacing CONCOR (+5%) and CARDIOMAGNYL (+7%) one rank down. The total share of the top 10 brands reduced from 9.5% to 8.3%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
2022	2021		2022	2021
1	1	XARELTO	1.4	1.8
2	2	ELIQUIS	1.3	1.5
3	3	ARBIDOL	0.9	1.2
4	4	INGAVIRIN	0.8	0.8
5	5	DETRALEX	0.7	0.8
6	6	MEXIDOL	0.7	0.8
7	8	NUROFEN	0.7	0.7
8	7	CONCOR	0.6	0.7
9	10	PENTALGIN	0.6	0.6
10	9	CARDIOMAGNYL	0.6	0.7
Total			8.3	9.5

XYLOMETAZOLINE (+20%) showed the largest sales among the leading top ten INN and generic names ranking (Table 3). The former leader of the rating RIVAROXABAN reduced its sales by 8% and moved down to rank two. APIXABAN (-2%) and UMIFENOVIR (-1%) also showed negative growth rates based on the results for the year. At the same time, the first-mentioned INN continued to hold rank three, whereas the second-mentioned moved down to rank seven from four. BISOPROLOL (+5%) lost two ranks, moving down to rank eight. In contrast, DIOSMIN*HESPERIDIN (+19%), NIMESULIDE (+28%) and IBUPROFEN (+18%) moved up to the higher ranks from four to six, respectively. The only newcomer ROSUVASTATIN (+24%) also improved its rating by three points, moving up to rank ten. The total share of the top 10 reduced from 12.2% to 11.5%.

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, %	
2022	2021		2022	2021
1	2	XYLOMETAZOLINE	1.6	1.6
2	1	RIVAROXABAN	1.4	1.8
3	3	APIXABAN	1.3	1.5
4	5	DIOSMIN*HESPERIDIN	1.2	1.2
5	8	NIMESULIDE	1.2	1.1
6	7	IBUPROFEN	1.1	1.1
7	4	UMIFENOVIR	1.1	1.2
8	6	BISOPROLOL	1.0	1.1
9	9	PANCREATIN	0.9	0.9
10	13	ROSUVASTATIN	0.8	0.8
Total			11.5	12.2

The 2022 ATC group leader Antithrombotic agents reduced their sales by 3% and moved down to rank three (Table 4). At the same time, C09 Agents acting on the rennin-angiotensin system (+21%) and M01 Anti-inflammatory and antirheumatic products (+24% each) moved up to the first two ranks in the top ten ranking. The other three drug manufacturers also rose in the ranks. G03 Sex hormones (+31%), R05 Cough and cold preparations (+24%) and N06 Psychoanaleptics (+20%) moved up to ranks seven, eight and ten. J05 Antivirals for systemic use (+15%), R01 Nasal preparations (+23%), N02 Analgesics (+25%) and C05 Vasoprotectives (+13%) held their previous ranks four through six, and nine, respectively. In total, the top ten ATC groups accumulated 39.4% of the regional market, which was more than the year-earlier period indicator (38.8%).

Table 4. The top ten ATC groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
2022	2021			2022	2021
1	2	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.7	5.5
2	3	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.3	5.0
3	1	B01	ANTITHROMBOTIC AGENTS	4.6	5.5
4	4	J05	ANTIVIRALS FOR SYSTEMIC USE	4.0	4.0
5	5	R01	NASAL PREPARATIONS	3.8	3.6
6	6	N02	ANALGESICS	3.7	3.4
7	8	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.5	3.1
8	10	R05	COUGH AND COLD PREPARATIONS	3.1	2.9
9	9	C05	VASOPROTECTIVES	2.9	3.0
10	11	N06	PSYCHOANALEPTICS	2.8	2.8
Total				39.4	38.8

Conclusion. Based on the results for 2022, the retail sales of the Central Federal District (without Moscow) market reached RUB 298.739 bil. (USD 4.430 bil.), which was by 17% in terms of roubles and 28% in terms of dollars more than in 2021. In physical terms the market showed low positive growth rates (+1%) and amounted to 987.601 mil. packs. In 2022, the average cost of an FPP pack in the regional pharmacies was USD 4.49, which was higher than the last year figure (USD 3.55), and less than the national average (USD 4.68). The average medicine expenses of the region residents turned out to be higher than the national average expenses in Russia (USD 167.36 vs. USD 155.29).

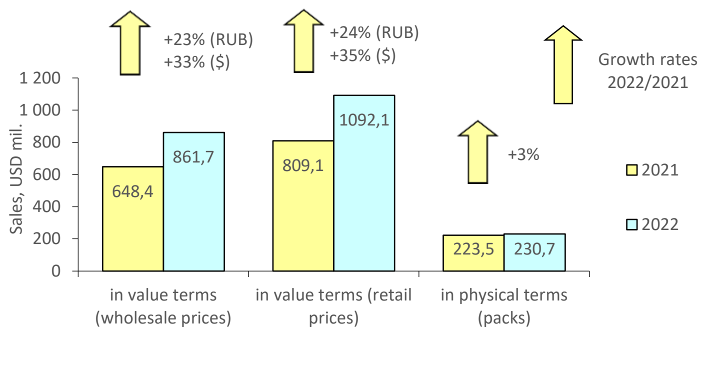
* Here and elsewhere IQVIA's data are used

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

According to Federal State Statistics Service, as of January 1, 2022 estimated population of the North-Western Federal District (NWFD) (exclus. 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 2022 the average wage in the NWFD (without St. Petersburg) was RUB 71213 (USD 1039.91), which was 11% higher than the average wage in Russia (RUB 64191).

According to the results of the Retail Audit of Finished Pharmaceutical Products (FPP) in the Russian Federationтм, the sales of drugs in physical terms in the NWFD (excl. of St. Petersburg) continued to show positive growth rates (+3%) and amounted to 230.653 mil. Packs based on the results for 2022. In money terms, the market increased by 23% in terms of roubles and 33% in terms of dollars. At the same time, the volume of the market amounted to RUB 58.466 bil. (USD 861.660 mil.) at wholesale prices (Fig. 1). The share of the region accounted for 4.8% of the Russian retail pharmacy sales. The average cost of an OTC pack in the pharmacies increased: USD 4.73 vs. USD 3.62 at retail prices in the year-earlier period. The average amount spent by the residents of the region for FPPs in the pharmacies for 12 months of 2022 amounted to USD 128.13.

Figure 1. NWFD (exc. of St. Petersburg) pharmacy market in 2021 – 2022.*



BAYER (+16%), OTCPHARM (+9%), STADA (+24%) and SERVIER (+23%) held the top four ranks in the top ten manufacturers ranking on the NWFD (exclusive of St. Petersburg) market based on the results for 2022 (Table 1). GEDEON RICHTER (+19%) also held its previous rank eight. Due to lagging behind the growth rates SANOFI (+10%) moved down to rank seven, giving way to KRKA (+21%) and TEVA (+18%). The newcomers BINNOPHARM (+43%) and BERLIN-CHEMIE/MENARINI (+25%) rounded out the top ten ranking. The total share of the top 10 drug manufacturers reduced by slightly less than 1 p.p. and accounted for 34.7%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
2022	2021		2022	2021
1	1	**BAYER**	4.9	5.2
2	2	OTCPHARM	3.9	4.4
3	3	**STADA**	3.9	3.9
4	4	**SERVIER**	3.9	3.8
5	6	**KRKA**	3.4	3.4
6	7	**TEVA**	3.3	3.4
7	5	**SANOFI**	3.2	3.5
8	8	GEDEON RICHTER	3.0	3.0
9	12	BINNOPHARM GROUP	2.7	2.3
10	11	**BERLIN-CHEMIE/MENARINI**	2.6	2.6
Total			34.7	35.6

*AIPM members are in bold

Two newcomers also broke into the ranks of the top ten ranking (Table 2). NOVARTIS (+75%) and TEVA (+89%) moved up to ranks five and eight. Apart from them, another three brands from the top ten showed high growth rates and rose in the ranks. XARELTO (+22%) and ELIQUIS (+33%) moved up to ranks one and two, and INGAVIRIN (+20%) moved up to rank four. The market of the brand DETRALEX (+24%) developed at a fast pace, however it lost one rank and moved down to rank seven. LORISTA (+16%) rounding out the top ten ranking moved one rank down. At the same time, ARBIDOL (-0,3%), NUROFEN (+11%) and CONCOR (+9%) lost two rating points each and moved down to ranks three, six and nine, respectively. The total share of the top 10 brands didn't change and accounted for 9.2%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
2022	2021		2022	2021
1	2	XARELTO	1.5	1.5
2	3	ELIQUIS	1.4	1.3
3	1	ARBIDOL	1.3	1.6
4	5	INGAVIRIN	0.8	0.8
5	11	THERAFLU	0.8	0.5
6	4	NUROFEN	0.8	0.8
7	6	DETRALEX	0.8	0.8
8	21	NIMESIL	0.7	0.4
9	7	CONCOR	0.7	0.7
10	9	LORISTA	0.6	0.6
Total			9.2	9.2

The top ten INN and grouping name ranking didn't change in composition, but only APIXABAN (+33%) held their own in the ranking (Table 3). Four ATC groups rose in the ranks, whereas five of them, in constant, fell in the ranks. RIVAROXABAN (+22%) and XYLOMETAZOLINE (+26%) moved up to ranks one and two, displacing the former leader UMIFENOVIR (+2%) down to rank three. ROSUVASTATIN (+31%) improved its position by one rank, coming in from rank ten to nine. UMIFENOVIR (+52%) that showed the highest growth rates among the leaders moved up to rank five from eight. At the same time, IBUPROFEN (+22%), DIOSMIN*HESPERIDIN (+26%), BISOPROLOL and ATORVASTATIN (+10% each) lost one rank each and moved down to ranks six through eight and ten, respectively. In total, ten INNs and generic names accounted for 12.4% of the regional sales, as 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, %	
2022	2021		2022	2021
1	2	RIVAROXABAN	1.5	1.5
2	3	XYLOMETAZOLINE	1.5	1.5
3	1	UMIFENOVIR	1.4	1.7
4	4	APIXABAN	1.4	1.3
5	8	NIMESULIDE	1.3	1.0
6	5	IBUPROFEN	1.2	1.2
7	6	DIOSMIN*HESPERIDIN	1.2	1.2
8	7	BISOPROLOL	1.0	1.2
9	10	ROSUVASTATIN	0.9	0.9
10	9	ATORVASTATIN	0.8	0.9
Total			12.4	12.4

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 (+37%), C05 Vasoprotectives (+20%) and A11 Vitamins (+15%) moved one rank up, coming in at numbers seven and two bottom ranks, respectively. On top of that, the latter became the only newcomer of the top ten ranking. Despite the outstripping growth rates, R05 Cough and cold preparations (+27%) lost one rating point and moved down to rank eight. The groups C09 Agents acting on the rennin-angiotensin system (+21%), M01 Anti-inflammatory and antirheumatic products (+31%), B01 Antithrombotic agents (+19%), J05 Antivirals for systemic use (+24%), G03 Sex hormones (+25%), and R01 Nasal preparations (+27%) held their previous top six ranks in the ranking. The top ten ATC groups accounted for 40.8% of the regional pharmacy sales, 40.1% 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, %	
2022	2021			2022	2021
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.9	6.0
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.6	5.2
3	3	B01	ANTITHROMBOTIC AGENTS	4.6	4.8
4	4	J05	ANTIVIRALS FOR SYSTEMIC USE	4.3	4.3
5	5	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.2	4.1
6	6	R01	NASAL PREPARATIONS	3.7	3.5
7	8	N02	ANALGESICS	3.6	3.2
8	7	R05	COUGH AND COLD PREPARATIONS	3.4	3.3
9	10	C05	VASOPROTECTIVES	2.9	2.9
10	11	A11	VITAMINS	2.6	2.8
Total				40.8	40.1

Conclusion. In 2022, the pharmacy market of the NWFD (exc. of St Petersburg) brought in RUB 73.995 bil. (USD 1.092 bil.), which was 24% in terms of roubles and 35% in terms of dollars more than in the same period of 2021. In pack terms, the market also showed positive growth rates (+3%) and achieved 230.653 mil. packs. According to the results for 2022, the average cost of an FPP pack in the regional pharmacies was USD 4.73, which was higher than the indicator of the same period of 2021 (USE 3.62) and average across the country (USD 4.68). However, the expenses of district residents for FPPs in the pharmacies were considerably lower than the national average (USD 128.13 vs. USD 155.29).

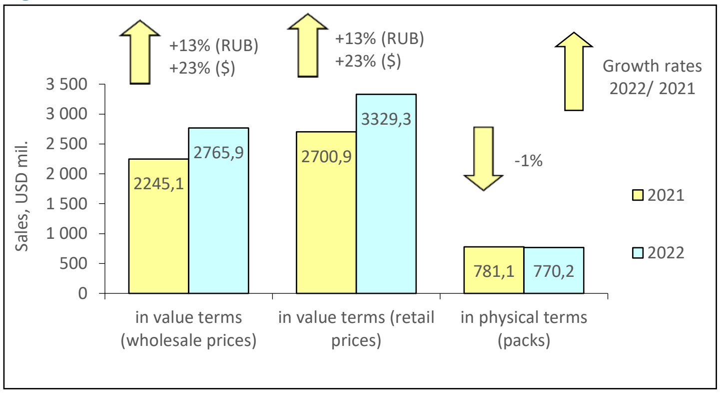
* Here and elsewhere IQVIA's data are used

VFD PHARMACY MARKET: 2022 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 2022 the average wage in the VFD was RUB 46483 (USD 678.78), which was 28% lower than the national average wage in Russia (RUB 64191).

According to the results of the Retail Audit of OTC drugs in Russian Federation™, the pharmacy market of VFD in pack terms reduced by 1% to 770.217 mil. packs for 12 months of 2020, as compared to 2021 (Figure 1). The sales in terms of wholesale prices increased by 13% in terms of roubles and 23% in terms of dollars and reached RUB 186.081 bil. (USD 2.766 bil.), A region's share in the total pharmacy sales in Russia accounted for 14.7%. Based on the results for 2022, the average cost of FPP in the VFD pharmacies increased compared with the year-earlier period (USD 3.46) and was equal to USD 4.32. The average per capita expenses for purchase of drugs in the pharmacies were estimated at USD 115.42.

Figure 1. VFD market in 2021– 2022*



At year-end 2022, in the retail market of the Volga Federal District, most manufacturers of the top 10 manufacturers ranking showed pronounced positive growth rates and rating progress (Table 1). STADA (+23%), KRKA (+16%) and ABBOTT (+10%) improved their ratings by one rank, moving up to ranks two, four and five. SERVIER (+19%), as well as its newcomers BINNOPHARM (+19%) and GEDEON RICHTER (+18%), which rounded out the top ten, moved up two ranks to number six. Two manufacturers BAYER (+0,2%) and TEVA (+0,1%), which showed almost zero growth rates, lost one rank each and moved down to ranks three and eight, respectively. As before, OTCPHARM that reduced sales by 2% headed the top ten, whereas SANOFI showing a 3% reduction moved three ranks down, coming in at number seven. The total share of the top 10 brands reduced from 31.4% to 30.2%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
2022	2021		2022	2021
1	1	OTCPHARM	4.1	4.7
2	3	**STADA**	3.8	3.5
3	2	**BAYER**	3.7	4.2
4	5	**KRKA**	3.0	3.0
5	6	**ABBOTT**	2.9	2.9
6	8	**SERVIER**	2.8	2.7
7	4	**SANOFI**	2.8	3.2
8	7	**TEVA**	2.5	2.9
9	11	BINNOPHARM GROUP	2.3	2.2
10	12	GEDEON RICHTER	2.3	2.1
Total			30.2	31.4

*AIPM members are in bold

The first three of the top 10 brands ranking was marked by reduction in sales (Table 2). At the same time, ARBIDOL (-16%) held its previous rank number one, and XARELTO (-10%) moved up to rank two, displacing ELIQUIS (-19%) one rank down. The other brands showed positive growth rates, three of them rose in the ranks. INGAVIRIN (+16%) moved up to rank five from six, whereas the newcomers DETRALEX (+16%) and EDARBI (+64%) broke into the top ten ranking, coming in at numbers eight and nine. At the same time, HEPTRAL и ACTOVEGIN, which increased their sales by 4%, moved down to ranks six and ten, respectively. The brands MEXIDOL (+8%) and PENTALGIN (+10%) kept their previous ranks four and seven. The total share of the top ten INN and group names ranking decreased by 1 p.p. to 7.4%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
2022	2021		2022	2021
1	1	ARBIDOL	1.1	1.5
2	3	XARELTO	1.0	1.3
3	2	ELIQUIS	0.9	1.3
4	4	MEXIDOL	0.7	0.7
5	6	INGAVIRIN	0.7	0.6
6	5	HEPTRAL	0.7	0.7
7	7	PENTALGIN	0.6	0.6
8	11	DETRALEX	0.6	0.6
9	23	EDARBI	0.6	0.4
10	8	ACTOVEGIN	0.5	0.6
Total			7.4	8.4

The leader of the top ten INN and generic names UMIFENOVIR (-10%) and BISOPROLOL (+8%) placed at rank seven held their own in the ranking (Table 3). XYLOMETAZOLINE (+21%), DIOSMIN* HESPERIDIN (+23%) and IBUPROFEN (+19%) moved to ranks two through four, respectively, displacing RIVAROXABAN (-10%) and PANCREATIN (+5%) down to ranks five and six. One more shift took place in the bottom part of the ranking. Due to 20% growth in sales, NIMESULIDE moved up to rank nine from 11, displacing ETHYLMETHYLHYDROXYPYRIDINE (+8%) one rank down. APIXABAN (-19%), which showed strong negative growth rates, moved down from rank two to eight. In total, the top ten INNs and generic names accounted for 10.6% of the regional market, in the year-earlier period – 11.5%.

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

Rank in the top ten		INN/Generic name	Share in total pharmacy sales, %	
2022	2021		2022	2021
1	1	UMIFENOVIR	1.6	2.0
2	4	XYLOMETAZOLINE	1.3	1.2
3	8	DIOSMIN*HESPERIDIN	1.1	1.0
4	6	IBUPROFEN	1.1	1.0
5	3	RIVAROXABAN	1.0	1.3
6	5	PANCREATIN	1.0	1.1
7	7	BISOPROLOL	0.9	1.0
8	2	APIXABAN	0.9	1.3
9	11	NIMESULIDE	0.9	0.8
10	9	ETHYLMETHYLHYDROXYPYRIDINE	0.9	0.9
Total			10.6	11.5

In contrast to the above rankings, the top ten ATC-group ranking did not change in composition (Table 4). In addition, half of the top ten ATC groups held their own in the ranking. Among them are C09 Drugs acting on the renin-angiotensin system (+17%), M01 Anti-inflammatory and antirheumatic drugs (+21%), J05 Antivirals for systemic use (+1%) and B01 Antithrombotic agents (-9%) as well as N06 Psychoanaleptics (+17%) rounding out the top ten ranking. Three groups showed progress in the rating: G03 Sex hormones (+23%), N02 Analgesics (+19%) and R01 Nasal preparations (+23%) moved up to ranks five through seven, respectively. At the same time, group R05 Cough and cold preparations (+16%) moved one rank down, while J01 Antibacterials for systemic use, which reduced sales by 6%, lost three ranks. In total, the top ten ATC groups accumulated 38.8% of the regional sales, which was lower than the last year indicator (39.3%).

Table 4. The top ten ATC groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
2022	2021			2022	2021
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.4	5.2
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.3	5.0
3	3	J05	ANTIVIRALS FOR SYSTEMIC USE	4.4	4.9
4	4	B01	ANTITHROMBOTIC AGENTS	3.9	4.8
5	6	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.6	3.3
6	7	N02	ANALGESICS	3.4	3.3
7	9	R01	NASAL PREPARATIONS	3.3	3.0
8	5	J01	ANTIBACTERIALS FOR SYST USE	3.2	3.8
9	8	R05	COUGH AND COLD PREPARATIONS	3.2	3.1
10	10	N06	PSYCHOANALEPTICS	3.0	2.9
Total				38.8	39.3

Conclusion. Based on the results for 2022, the pharmacy market in the VFD was estimated at RUB 223.905 bil. (USD 3.329 bil.) at retail prices. At the same time, the market behaviour was positive both in rouble (+13%) and dollar (+23%) terms. In physical terms, the sales reduced by 1% to 770.217 mil. packs. The average cost of an OTC pack based on the results for 2022 was USD 4.32, which is more than in the year-earlier period (USD 3.46), but lower than the national average (USD 4.68). Per capita expenses of the district residents for purchase of medicines in the pharmacies were also lower than the national average figures (USD 115.42 vs. USD 155.29).

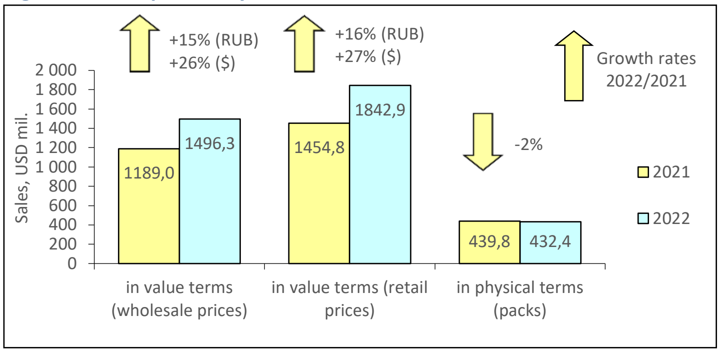
* Here and elsewhere IQVIA's data are used

SoFD PHARMACY MARKET: 2022 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 2022 the average wage in the Southern FD was RUB 45213 (USD 660.24), which was 30% lower than the national average wage in Russia (RUB 64191).

According to the results of the Retail Audit of FPP (Finished Pharmaceutical Products) in Russian Federation™, the sales of drugs in physical terms in the Southern Federal District saw a 2% decrease to 432.441 mil. packs based on the results for 2022. In value terms, the market showed strong positive growth rates both in rouble (+15%) terms, and in dollar terms (+26%) and reached RUB 100.379 bil. (USD 1.496 mil.) in wholesale prices (Fig. 1). The city market share accounted for 8.1% of the pharmacy sales in Russia. Based on the results for twelve months of 2022, the average cost of a finished pharma product (FPP) pack was USD 4.26 at retail prices vs. USD 3.31 in a year-earlier period. In the period under review, the average amount spent by residents of the SoFD for drugs amounted to USD 112.13.

Figure 1. SoFD pharmacy market in 2021 – 2022*



At year-end 2022, the top three from the top ten manufacturers on the pharmacy market of the Southern Federal District (SoFD) did not change in composition, but a shift took place in the top ten ranking (Table 1). Due to 6% reduction in sales, OTCPHARM moved down to rank three, giving way to BAYER (+8%) and STADA (+27%). In addition, the other three brands from the top ten moved up to the higher ranks. SERVIER (+18%) and BINNOPHARM (+43%) moved two ranks up, coming in at numbers four and eight, and the only newcomer GEDEON RICHTER (+26%) moved to rank ten. The less dynamic SANOFI (+5%) and ABBOTT (+2%), as well as BERLIN-CHEMIE/MENARINI that reduced its sales by 3%, in contrast, lost one rating point each. The manufacturer TEVA (+8%) managed to hold rank eight. In total, the top ten manufacturers accounted for 30.1% of the Russian market, whereas in the year– earlier period they had accounted for 31.3%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
2022	2021		2022	2021
1	2	**BAYER**	4.1	4.4
2	3	**STADA**	3.7	3.4
3	1	OTCPHARM	3.6	4.4
4	6	**SERVIER**	3.1	3.0
5	4	**SANOFI**	3.0	3.3
6	5	**ABBOTT**	2.8	3.2
7	7	**TEVA**	2.7	2.8
8	10	BINNOPHARM GROUP	2.6	2.1
9	8	**BERLIN-CHEMIE/MENARINI**	2.4	2.8
10	11	GEDEON RICHTER	2.1	2.0
Total			30.1	31.3

*AIPM members are in bold

Despite the negative growth rates, ARBIDOL (-9%), ELIQUIS (-17%) and XARELTO (-12%) held their top tree ranks in the top ten brands ranking (Table 2). Two more brands from the top ten brands saw reduction in sales. DETRALEX (-1%) and HEPTRAL (-9%) moved down to ranks seven and eight, respectively. In contrast, the markets of INGAVIRIN (+18%), THERAFLU (+47%) and GRAMMIDIN (+65%) developed at a fast pace, moving up to ranks four, five and nine, respectively. At the same time, two of them THERAFLU and GRAMMIDIN broke into the top ten ranking for the first time. NUROFEN and PENTALGIN that saw a 8% increase in sales also changed their ranks in the ranking. And if the first-mentioned moved one rank up to number six, the second-mentioned lost the rank, being displaced by the more dynamic brand to the lowest position in the top ten. In total, the top ten brands accumulated 7.9% of the regional market, whereas in the year-earlier period it was 9.0%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
2022	2021		2022	2021
1	1	ARBIDOL	1.3	1.7
2	2	ELIQUIS	1.2	1.6
3	3	XARELTO	0.9	1.2
4	5	INGAVIRIN	0.8	0.7
5	11	THERAFLU	0.7	0.5
6	7	NUROFEN	0.7	0.7
7	6	DETRALEX	0.6	0.7
8	4	HEPTRAL	0.6	0.8
9	23	GRAMMIDIN	0.5	0.4
10	9	PENTALGIN	0.5	0.6
Total			7.9	9.0

In contrast to the above rankings, the top ten INNs and generic names ranking did not change in composition (Table 3). However, only one of its INNs managed to maintain its previous position: the composition DIOSMIN* HESPERIDIN (+16%) continued to hold rank six. INNs XYLOMETAZOLINE (+27%), IBUPROFEN (+31%) and NIMESULIDE (+22%) demonstrated outperforming rates and ranking progress, moving up to ranks one, four and five, respectively. The less dynamic BISOPROLOL (+12%) improved its rating by one rank, coming in at rank nine. In contrast, the other ATC groups from the top 10 ranking moved down to the lower ranks. They included UMIFENOVIR (-2%), APIXABAN (-17%), PANCREATIN (-2%) and RIVAROXABAN (-12%) reducing their sales, and ADEMETIONINE (+9%) showing almost zero growth rates, which moved down to ranks two, three, seven, eight and ten, respectively. The total share of the top ten brands reduced by nearly 1 p.p. up to 11.4%.

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

Rank in the top ten		INN/Generic name	Share in total pharmacy sales, %	
2022	2021		2022	2021
1	3	XYLOMETAZOLINE	1.7	1.6
2	1	UMIFENOVIR	1.6	1.8
3	2	APIXABAN	1.2	1.6
4	8	IBUPROFEN	1.1	1.0
5	7	NIMESULIDE	1.1	1.0
6	6	DIOSMIN*HESPERIDIN	1.1	1.1
7	5	PANCREATIN	1.0	1.1
8	4	RIVAROXABAN	0.9	1.2
9	10	BISOPROLOL	0.8	0.9
10	9	ADEMETIONINE	0.8	0.9
Total			11.4	12.3

The markets of most of the top 10 ATC groups developed at rates higher than the market average (Table 4). Among them were M01 Anti-inflammatory and antirheumatic drugs (+22%), which moved up to rank one. Groups C09 Drugs acting on the renin-angiotensin system (+25%), N02 Analgesics (+19%) and N06 Psychoanaleptics (+15%) improved their ratings by two points, moving up to ranks three, four and ten. On top of that, the latter broke into the ranks of the top 10 ranking for the first time. R01 Nasal preparations (+31%) and G03 Sex hormones (+35%) moved one rank up, to numbers six and seven. Also, due to outstripping growth rates R05 Cough and cold preparations (+20%) held and secured its previous rank nine. J05 Antivirals for systemic use (+4%) that showed low growth rates, and B01 Antithrombotic agents (-10%) and J01 Antibacterials for systemic use (-12%) that reduced their sales moved down to ranks two, five and eight, respectively. The total share of the top ten reduced from 40% to 39.4%.

Table 4. The top ten ATC groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
2022	2021			2022	2021
1	3	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.2	4.9
2	1	J05	ANTIVIRALS FOR SYSTEMIC USE	4.9	5.4
3	5	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	4.6	4.2
4	6	N02	ANALGESICS	4.1	4.0
5	2	B01	ANTITHROMBOTIC AGENTS	4.0	5.0
6	7	R01	NASAL PREPARATIONS	3.9	3.4
7	8	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.5	3.0
8	4	J01	ANTIBACTERIALS FOR SYST USE	3.3	4.3
9	9	R05	COUGH AND COLD PREPARATIONS	3.1	2.9
10	12	N06	PSYCHOANALEPTICS	2.8	2.8
Total				39.4	40.0

Conclusion. On the basis of the results for 2022, the retail pharmacy market of the SoFD brought in RUB 123.668 bil. (USD 1.843 mil.) at retail prices. At the same time, the sales increased 16% in terms of roubles and 27% in terms of dollars. The regional pharmacies sold 432.441 mil. packs, which was 2% less than in 2021. The average retail cost of an FPP pack based on the results for 2022 amounted to USD 4.26, which was more than in the previous year (USD 3.31), but still lower than the national average (USD 4.68). The average expenses of the SoFD residents for FPPs in the pharmacies over this period were also lower than the national average (USD 112.13 vs. USD 155.29).

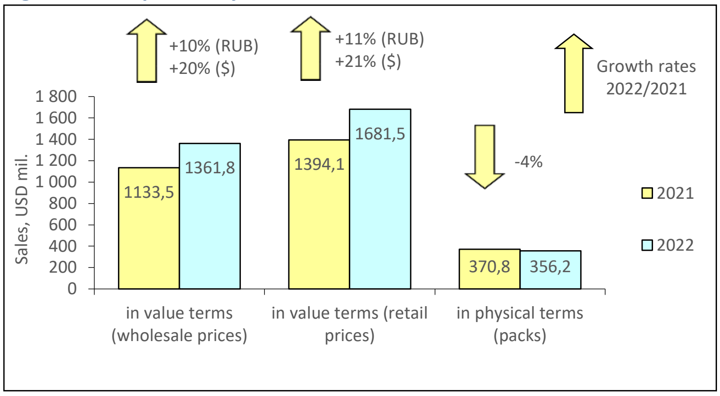
* Here and elsewhere IQVIA's data are used

UFD PHARMACY MARKET: 2022 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, the average wage in the Ural FD for 12 months of 2022 was RUB 67977 (USD 992.65), which was 6% higher than the average wage in Russia (RUB 64191).

According to the results of the Retail Audit of Over-the-Counter Drugs (OTC) in Russian Federation™, at year-end 2022 the sales of OTC drugs in physical terms in pharmacies of UFD saw a 4% decrease to 356.225 mil. packs. In value terms, the market showed positive growth rates: it increased by 10% in rouble terms and by 20% in dollar terms and reached RUB 91.825 bil. (USD 1.362 mil.) in wholesale prices (Fig. 1). The regional retail sales share accounted for 7.4% of all pharmacy sales in Russia. The average cost of an FPP pack in 2022 was USD 4.72 vs USD 3.76 in the year-earlier period. For 2022 as a whole, the average amount spent by residents of the UFD for drugs amounted to USD 136.76.

Figure 1. UFD pharmacy market in 2021 – 2022*



At year-end 2022 four of the top 10 manufacturers in the retail market of the Urals Federal District showed above-market growth rates (Table 1). Thus, sales of STADA and GEDEON RICHTER increased by 17%, those of SERVIER and BINNOPHARM grew by 14%, which allowed them to move up to ranks two, seven, five and ten, respectively. Note that the latter broke into the top 10 ranking for the first time. In addition to above-mentioned, KRKA (+6%) managed to move one rank up, to number nine. ABBOTT (+6%) that showed the same growth rates maintained its previous rank six, and a bit less dynamic OTCPHARM (+4%) held its rank number one. SANOFI (-6%) that reduced its sales also held its previous rank four. At the same time, BAYER (-0,1%) showing almost zero growth rates and TEVA (-4%) reducing its sales moved down to ranks three and eight, respectively. The total share attributable to the top 10 drug manufacturers reduced from 32.6% to 31.4%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
2022	2021		2022	2021
1	1	OTCPHARM	4.2	4.4
2	3	**STADA**	4.1	3.9
3	2	**BAYER**	4.0	4.4
4	4	**SANOFI**	3.0	3.5
5	7	**SERVIER**	2.9	2.8
6	6	**ABBOTT**	2.8	2.9
7	9	GEDEON RICHTER	2.8	2.7
8	5	**TEVA**	2.8	3.2
9	10	**KRKA**	2.5	2.6
10	12	BINNOPHARM GROUP	2.2	2.2
Total			31.4	32.6

*AIPM members are in bold

The first four of the top-10 brands ranking remained the same (Table 2). At the same time, ARBIDOL, XARELTO and ELIQUIS held leadership despite a 14% reduction in sales, whereas the market of the brand DETRALEX expanded by 10%. INGAVIRIN (+19%) and PENTALGIN (+16%), which moved up to ranks five and seven, as well as the newcomers FEMOSTON (+39%) and GRAMMIDIN (+48) broking into the top ten ranking and rounding it out showed positive growth rates. Sales of HEPTRAL and NUROFEN reduced by 2% and 5% respectively, which resulted in the loss of their rating positions. The total share of the top ten ranking was equal to 6.6%, and in a year-earlier period - to 7.2%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
2022	2021		2022	2021
1	1	ARBIDOL	1.1	1.4
2	2	XARELTO	0.9	1.1
3	3	ELIQUIS	0.7	0.9
4	4	DETRALEX	0.7	0.7
5	7	INGAVIRIN	0.6	0.6
6	5	HEPTRAL	0.6	0.7
7	8	PENTALGIN	0.5	0.5
8	6	NUROFEN	0.5	0.6
9	18	FEMOSTON	0.5	0.4
10	26	GRAMMIDIN	0.5	0.4
Total			6.6	7.2

The top INN and generic names ranking leader changed: XYLOMETAZOLINE (+15%) moved up to rank one from two, displacing UMIFENOVIR (-9%) down to rank two (Table 3). The composition DIOSMIN*HESPERIDIN (+22%) held and reinforced its rank three. It was followed by IBUPROFEN (+15%) and NIMESULIDE (+20%) which moved up to these positions from the lower ones. ROSUVASTATIN (+16%) improved its ranking by two points, and ADEMETIONINE (+3%) - by one point. At the same time, RIVAROXABAN and APIXABAN, which decreased their sales by 14%, moved down to rank eight and the last one. INN PANCREATIN (+4%) held its rank six. The cumulative share of the top 10 ranking decreased by 0.5 p.p. to 10.2%.

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

Rank in the top ten		INN/Generic name	Share in total pharmacy sales, %	
2022	2021		2022	2021
1	2	XYLOMETAZOLINE	1.4	1.3
2	1	UMIFENOVIR	1.4	1.6
3	3	DIOSMIN*HESPERIDIN	1.3	1.1
4	5	IBUPROFEN	1.1	1.0
5	8	NIMESULIDE	0.9	0.9
6	6	PANCREATIN	0.9	1.0
7	9	ROSUVASTATIN	0.9	0.9
8	4	RIVAROXABAN	0.9	1.1
9	10	ADEMETIONINE	0.8	0.8
10	7	APIXABAN	0.7	0.9
Total			10.2	10.7

M01 Anti-inflammatory and antirheumatic products (+17%) and C09 Agents acting on the rennin-angiotensin system (+9%) remained the bestselling ATC groups in the regional market (Table 4). G03 Sex hormones (+19%) moved up to rank three from five, displacing J05 Antivirals for systemic use (+3%) one rank down. In addition to them, N02 Analgesics (+20%) and newcomers N06 Psychoanaleptics (+15%) and C05 Vasoprotectives (+13%) breaking into the top 10 ranking also moved up to the higher positions. R01 Nasal preparations (+13%) and R05 Cough and cold preparations (+12%) held their ranks six and eight. B01 Antithrombotic agents (-8%) that moved down to rank seven from four became the only ATC group of the top ten that reduced its sales. In total, the top ten ATC groups accumulated 37.9% of the regional market, whereas in the year-earlier period they accounted for 37.6%.

Table 4. The top ten ATC groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
2022	2021			2022	2021
1	1	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.3	5.0
2	2	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	4.9	5.0
3	5	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.2	3.9
4	3	J05	ANTIVIRALS FOR SYSTEMIC USE	4.2	4.5
5	7	N02	ANALGESICS	3.6	3.3
6	6	R01	NASAL PREPARATIONS	3.5	3.5
7	4	B01	ANTITHROMBOTIC AGENTS	3.3	4.0
8	8	R05	COUGH AND COLD PREPARATIONS	3.2	3.1
9	11	N06	PSYCHOANALEPTICS	2.9	2.7
10	12	C05	VASOPROTECTIVES	2.8	2.7
Total				37.9	37.6

Conclusion. In January-December 2022, the pharmacy market of the Ural Federal District brought in RUB 91.825 bil. (USD 1.362 bil.) in retail prices. The regional sales increased by 11% in terms of roubles, and 21% in terms of dollars. In pack terms, the market reduced by 4% and amounted to 356.225 mil. packs. At year-end 2022, the average cost of an FPP pack in the regional pharmacies was USD 4.72, which was higher than the last year figures (USD 3.76), and the national average (USD 4.68). But the average expenses of the UFD residents for medications in the pharmacies were lower than the national average (USD 136.76 vs. USD 155.29).

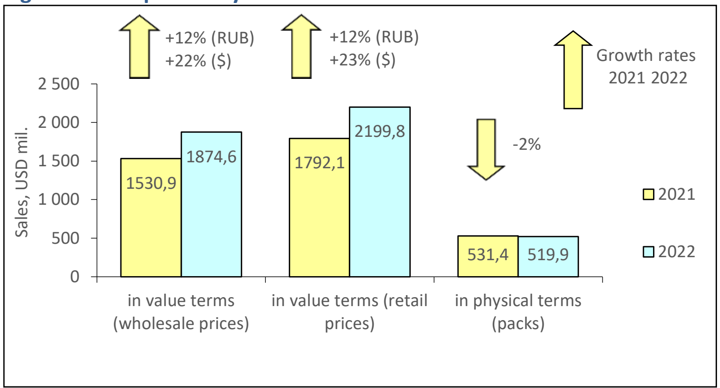
* Here and elsewhere IQVIA's data are used

SiFD PHARMACY MARKET: 2022 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 2022 the average wage in the Siberian FD was RUB 56146 (USD 819.89), which was 13% lower than the national average wage in Russia (RUB 64191).

According to the results of the Retail Audit of FPPs in Russian Federation™, in 2022 the SiFD pharmacy market volume in physical terms reduced by 2% to 519.939 mil. packs (Fig. 1). In wholesale prices, the sales grew by 12% in terms of roubles and by 22% in terms of dollars, reaching RUB 126.029 bil. (USD 1.875 bil.), The region's share accounted for 9.7% of the total pharmacy sales in the Russian pharmacy market pattern. Based on the results for twelve months of 2022, the average cost of a FPP pack in the SiFD pharmacies was USD 4.23, whereas in the year-earlier period its cost was USD 3.37. In the period under review, per capita expenses of the SiFD residents for purchase of FPPs in the pharmacies amounted to USD 130.25.

Figure 1. SiFD pharmacy market in 2021 – 2022*



According to the results for 2022, the most dynamic company STADA (+19%) became the leader in the top ten manufacturers ranking in the pharmacy market of the Siberian Federal District (Table 1). BAYER and OTCPHARM, which previously headed the top 10 ranking and showed a 3% increase in sales, moved one line down, to ranks two and three. In addition to the leaders, the other five brands of the top ten moved up to yet higher ranks. SERVIER (+12%), ABBOTT (+10%) and GEDEON RICHTER (+18%) improved their rating by one point, moving up to ranks five, eight and nine, respectively. KRKA (+16%) moved up to rank four from seven, and the newcomer AKRIKHIN (+15%) rounded out the top ten ranking. SANOFI, which reduced its sales by 5%, and TEVA (+1%), which showed low growth rates, on the contrary, moved down to ranks six and seven. The total share of the top ten manufacturers ranking decreased by 1 p.p. to 31.9%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
2022	2021		2022	2021
1	3	**STADA**	4.2	3.9
2	1	**BAYER**	4.1	4.5
3	2	OTCPHARM	3.9	4.3
4	7	**KRKA**	3.1	3.0
5	6	**SERVIER**	3.1	3.1
6	4	**SANOFI**	2.9	3.4
7	5	**TEVA**	2.8	3.1
8	9	**ABBOTT**	2.7	2.8
9	10	GEDEON RICHTER	2.5	2.4
10	12	AKRIKHIN-PHARMA	2.4	2.3
Total			31.9	32.9

*AIPM members are in bold

The top five of the top ten brands ranking remained the same (Table 2). Despite the decline in sales and market share, ARBIDOL (-16%), ELIQUIS (-1%) and XARELTO (-3%) hold ranks one through three, while DETRALEX (+11%) and LORISTA (+15%) continued to keep ranks four and five. The remaining five brands showed growth in sales. At the same time, PENTALGIN (+20%), THERAFLU (+27%) and FEMOSTON (+40%) moved up to ranks six, seven and ten, respectively. Note that THERAFLU and FEMOSTON broke into the top ten brands ranking for the first time. At the same time, the less dynamic INGAVIRIN (+8%) and CARDIOMAGNYL (+6%), on the contrary, moved down to ranks eight and nine. In total, the top ten brands accumulated 7.4% of the pharmacy sales, whereas in the year- earlier period - 7.9%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
2022	2021		2022	2021
1	1	ARBIDOL	1.1	1.5
2	2	ELIQUIS	1.0	1.1
3	3	XARELTO	0.9	1.0
4	4	DETRALEX	0.7	0.7
5	5	LORISTA	0.7	0.7
6	8	PENTALGIN	0.6	0.6
7	12	THERAFLU	0.6	0.5
8	7	INGAVIRIN	0.6	0.6
9	6	CARDIOMAGNYL	0.6	0.7
10	17	FEMOSTON	0.6	0.4
Total			7.4	7.9

The top INN and generic names ranking leader changed (Table 3). Its former leader UMIFENOVIR reduced sales by 12% and moved down to rank two, giving way to XYLOMETAZOLINE, which sales, in contrast, increased by 14%. The composition DIOSMIN* HESPERIDIN (+22%) and INNs IBUPROFEN (+11%) and NIMESULIDE (+22%) moved up to ranks three through five, respectively. The newcomer ROSUVASTATIN (+16%) that broke into the top ten ranking for the first time also improved its positions by two ranks. APIXABAN (-1%) and RIVAROXABAN (-3%), which moved down to ranks six and eight, respectively, saw a decrease in sales and rating positions. INNs BISOPROLOL (+8%) and PANCREATIN (+9%) continued to hold ranks seven and nine. The consolidated share of the 10 reduced from 10.8% to 10.4%.

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

Rank in the top ten		INN/Generic name	Share in total pharmacy sales, %	
2022	2021		2022	2021
1	2	XYLOMETAZOLINE	1.4	1.4
2	1	UMIFENOVIR	1.3	1.7
3	4	DIOSMIN*HESPERIDIN	1.2	1.1
4	5	IBUPROFEN	1.0	1.0
5	8	NIMESULIDE	1.0	0.9
6	3	APIXABAN	1.0	1.1
7	7	BISOPROLOL	1.0	1.0
8	6	RIVAROXABAN	0.9	1.0
9	9	PANCREATIN	0.8	0.8
10	12	ROSUVASTATIN	0.7	0.7
Total			10.4	10.8

Only one of the top 10 ATC groups R01 Nasal preparations (+17%) held its own in the ranking (Table 4). Most of the ATC-groups rose in the ranks. For example, M01 Anti-inflammatory and antirheumatic products (+18%) moved up to rank one from two, displacing C09 Agents acting on the rennin-angiotensin system (+15%) to rank two. R05 Cough and cold preparations (+10%) and C05 Vasoprotectives (+13%) also improved their rating position by one rank, while the more dynamic G03 Sex hormones (+19%), N02 Analgesics (+22%) and N06 Psychoanaleptics (+16%) moved two ranks up. Note that the last group broke into the top ten rating for the first time. At the same time, J05 Antivirals for systemic use (+4%), which showed low growth rates, and B01 Antithrombotic agents (-1%), which reduced sales, moved down to ranks five and six. The total share of the top ten ATC - groups increased from 37.8% to 38.3%.

Table 4. The top ten ATC groups by pharmacy sales

Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
2022	2021			2022	2021
1	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.4	5.1
2	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.3	5.2
3	5	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	4.2	4.0
4	6	N02	ANALGESICS	3.9	3.6
5	4	J05	ANTIVIRALS FOR SYSTEMIC USE	3.8	4.0
6	3	B01	ANTITHROMBOTIC AGENTS	3.6	4.1
7	7	R01	NASAL PREPARATIONS	3.5	3.4
8	9	R05	COUGH AND COLD PREPARATIONS	3.1	3.1
9	10	C05	VASOPROTECTIVES	2.8	2.8
10	12	N06	PSYCHOANALEPTICS	2.7	2.6
Total				38.3	37.8

Conclusion. At the year-end 2022, the pharmacy market in the Siberian Federal District was estimated at RUB 147.876 bil. (USD 2.200 bil.) in final consumer prices. At the same time, the market behaviour was positive both in rouble (+12%) and dollar (+23%) terms. In physical terms, the sales reduced by 2% and amounted to 519.939 mil. packs. The average cost of an FPP pack grew as compared to a year earlier (USD 4.23 vs. USD 3.37), but continued to be lower than the national FPP price average in Russia (USD 4.68). Per capita expenses of the district residents for purchase of medicines in the pharmacies were also lower than the national average figures (USD 130.25 vs. USD 155.29).

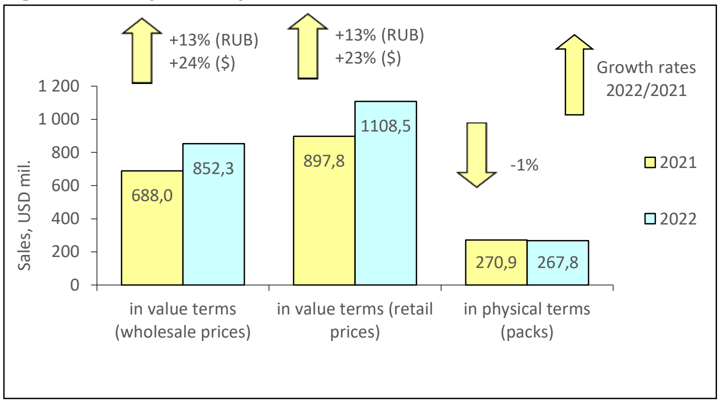
* Here and elsewhere IQVIA's data are used

FEFD PHARMACY MARKET: 2022 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 2022 the average wage in the Far Eastern FD was RUB 74041 (USD 1081.21), which was 15% higher than the average wage in Russia (RUB 64191).

According to the results of the Retail Audit of Finished Pharma Products in Russian Federation™, at year-end 2022 the sales of drugs in physical terms in the pharmacies of the FEFD saw a 1% decrease to 267.756 mil. packs. In money terms, the market expanded by 13% in terms of roubles, and 24% in terms of dollars. At the same time, the volume of the market amounted to RUB 57.285 bil. (USD 852.268 mil.) at wholesale prices (Fig. 1). The district's share accounted for 4.9% of the all-Russia sales in retail prices. The average cost of a pack increased as compared to a year earlier period (USD 3.31) and was equal to USD 4.14. Based on the results for 12 months of 2022, the average amount spent by the FEFD residents for drugs in the pharmacies amounted to USD 137.00.

Figure 1. FEFD pharmacy market in 2021 – 2022*



The top 10 manufacturers in the retail market of the Far Eastern Federal District in 2022 remained unchanged in composition (Table 1). At the same time, only KRKA and ABBOTT (+9% each), which were placed at rank four and the last one, held their own in the ranking. Three manufacturers of the top ten were able to improve their rating positions. Among them were STADA (+19%), which topped the rating, as well as SERVIER (+13%) and GEDEON RICHTER (+11%), which moved up to ranks five and seven. At the same time, BAYER (+2%), OTCPHARM (+3%), TEVA (+6%) and SANOFI (+3%), which showed low growth rates, lost one rating point each, while SANDOZ (-9%) that reduced sales moved two ranks down. The cumulative share of the top-ten reduced by 2 p.p. and achieved 32.6%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
2022	2021		2022	2021
1	3	**STADA**	4.3	4.1
2	1	**BAYER**	4.2	4.7
3	2	OTCPHARM	4.1	4.6
4	4	**KRKA**	3.2	3.3
5	8	**SERVIER**	3.1	3.1
6	5	**TEVA**	3.0	3.2
7	9	GEDEON RICHTER	2.9	3.0
8	7	**SANOFI**	2.8	3.1
9	6	**SANDOZ**	2.5	3.1
10	10	**ABBOTT**	2.5	2.5
Total			32.6	34.7

*AIPM members are in bold

ARBIDOL (-10%), XARELTO (+1%) and ELIQUIS (+3%) remained the bestselling brands on the regional market, though the sales of former two reduced (Table 2). LORISTA (-1%) also showed negative growth rates, losing three rating points and moving down to the last rank in the top 10 ranking. The remaining six brands showed positive sales rates, in most cases outstripping. Due to this, THERAFLU (+42%), INGAVIRIN (+34%) and MIRAMISTIN (+15%) moved up to ranks four, six and nine, respectively. At the same time, they displaced DETRALEX (+15%) two ranks down, despite the outstripping growth rates. NUROFEN (+11%) and CARDIOMAGNYL (+8%) also moved down to the lower positions. The total share of the top-10 reduced from 8.8% to 8.4%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
2022	2021		2022	2021
1	1	ARBIDOL	1.6	1.9
2	2	XARELTO	1.0	1.1
3	3	ELIQUIS	0.8	0.9
4	8	THERAFLU	0.8	0.7
5	4	NUROFEN	0.8	0.8
6	9	INGAVIRIN	0.8	0.6
7	5	DETRALEX	0.7	0.7
8	6	CARDIOMAGNYL	0.7	0.7
9	10	MIRAMISTIN	0.6	0.6
10	7	LORISTA	0.6	0.7
Total			8.4	8.8

The first three of the top 10 INNs and generic names did not change either: UMIFENOVIR (-6%), XYLOMETAZOLINE (+21%) and IBUPROFEN (+18%) held their first three positions (Table 3). Some shifts, including the appearance of newcomer took place in the lower part of the top-10 ranking. The most dynamic among the leaders IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID (+34%) closed the top ten ranking. DIOSMIN*HESPERIDIN (+15%), NIMESULIDE (+28%) и PANCREATIN (+16%) also moved to the higher ranks four, five and eight. At the same time, they displaced BISOPROLOL (+10%) one rank, and APIXABAN (+3%) two ranks down. RIVAROXABAN reduced sales by 1% and lost two rating points. The aggregate share of the top-10 reduced from 11.4% to 11.2%.

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

Rank in the top ten		INN/Generic name	Share in total pharmacy sales, %	
2022	2021		2022	2021
1	1	UMIFENOVIR	1.7	2.1
2	2	XYLOMETAZOLINE	1.7	1.6
3	3	IBUPROFEN	1.3	1.3
4	5	DIOSMIN*HESPERIDIN	1.0	1.0
5	8	NIMESULIDE	1.0	0.9
6	4	RIVAROXABAN	1.0	1.1
7	6	BISOPROLOL	0.9	1.0
8	9	PANCREATIN	0.9	0.9
9	7	APIXABAN	0.8	0.9
10	17	IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID	0.8	0.6
Total			11.2	11.4

M01 Anti-inflammatory and antirheumatic products (+20%), C09 Agents acting on the rennin-angiotensin system (+15%) and J05 Antivirals for systemic use (+10%) remained the market leaders among ATC groups in the regional market (Table 4). G03 Sex hormones (+18%) held their previous rank five, while the remaining ATC groups of the top 10 shifted their positions. R01 Nasal preparations (+22%) and N02 Analgesics (+26%) moved two ranks up, coming in at numbers four and six. R05 Cough and cold preparations (+27%) moved one rank up. The newcomer A10 Drugs used in diabetes (+20%) broke into the top ten ranking, coming in at number 10. B01 Antithrombotic agents (+1%) and J01 Antibacterials for systemic use (+4%), which showed low growth rates, moved down to ranks seven and nine, respectively. The total share of the analysed ranking accounted for 38.7% against 37.9% 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, %	
2022	2021			2022	2021
1	1	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.2	4.9
2	2	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	4.8	4.8
3	3	J05	ANTIVIRALS FOR SYSTEMIC USE	4.5	4.7
4	6	R01	NASAL PREPARATIONS	3.9	3.6
5	5	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.8	3.6
6	8	N02	ANALGESICS	3.7	3.4
7	4	B01	ANTITHROMBOTIC AGENTS	3.5	3.9
8	9	R05	COUGH AND COLD PREPARATIONS	3.4	3.1
9	7	J01	ANTIBACTERIALS FOR SYST USE	3.2	3.4
10	15	A10	DRUGS USED IN DIABETES	2.6	2.4
Total				38.7	37.9

Conclusion. In 2022, the retail market of the Far Eastern Federal District brought in RUB 74.489 bil. (USD 1.109 bil.), which was by 13% in terms of roubles and 23% in terms of dollars more than in 2021. In pack terms, the market reduced by 1% as compared to the previous year and amounted to 267.756 bil. packs. According to the results for 12 months of 2022, the average cost of a drug pack in the regional pharmacies was USD 4.14, which was higher than the 2021 figure (USE 3.31), but less than the average across the country (USD 4.68). The average medicine expenses of the district residents were also lower than the national average expenses in Russia (137.00 USD vs. 155.29 USD).

* Here and elsewhere IQVIA's data are used