

***Overview of pharmacy sales of medicinal products for the treatment of influenza based on the results of the first half of 2017***

The autumn with its inclement weather is the season of colds and influenza. Some people use vaccination as a protection, to prevent the disease. Others prefer traditional medicines that can be used for both prevention and treatment. Influenza infection spreads among people by airborne droplets, causing a wave of epidemics each year, which is primarily due to frequent changes in the antigenic structure of the virus. According to the estimates made by WHO, 250 to 500 thousand people worldwide die from all the variants of the influenza virus during seasonal epidemics. The flu is especially dangerous for children under 2 years of age, pregnant women and elderly people.

Still, we have good news: according to Federal Service for Supervision of Consumer Protection and Welfare (Rosпотребнадзор), the incidence of the influenza virus infections decreased by 37.8% in the period from January to June 2017 compared to the same period in 2016, which indicates timely prevention and effective treatment.

The volume of commercial retail market of anti-influenza drugs in the first half of 2017 amounted to 24.3 billion rubles (+ 0.4%) and 70.3 million packages (-2.7%). The competitive group included 79 brands that were distributed among the following EphMRA groups:

<b><i>EphMRA (code)</i></b>	<b><i>EphMRA (name)</i></b>
<b>L3A</b>	Immune system stimulators, not including interferons
<b>L3A9</b>	Other drugs with immune system stimulating effect, not including interferons
<b>L3B3</b>	Interferon gamma
<b>L3B1</b>	Interferon alpha
<b>R5A</b>	Anti-cold drugs without antimicrobial ingredients (a selection of drugs)
<b>J5B</b>	Antiviral drugs, not including drugs for the treatment of HIV disease
<b>J5B4</b>	Antiviral drugs for treating influenza
<b>J5B9</b>	Other antiviral drugs (a selection)

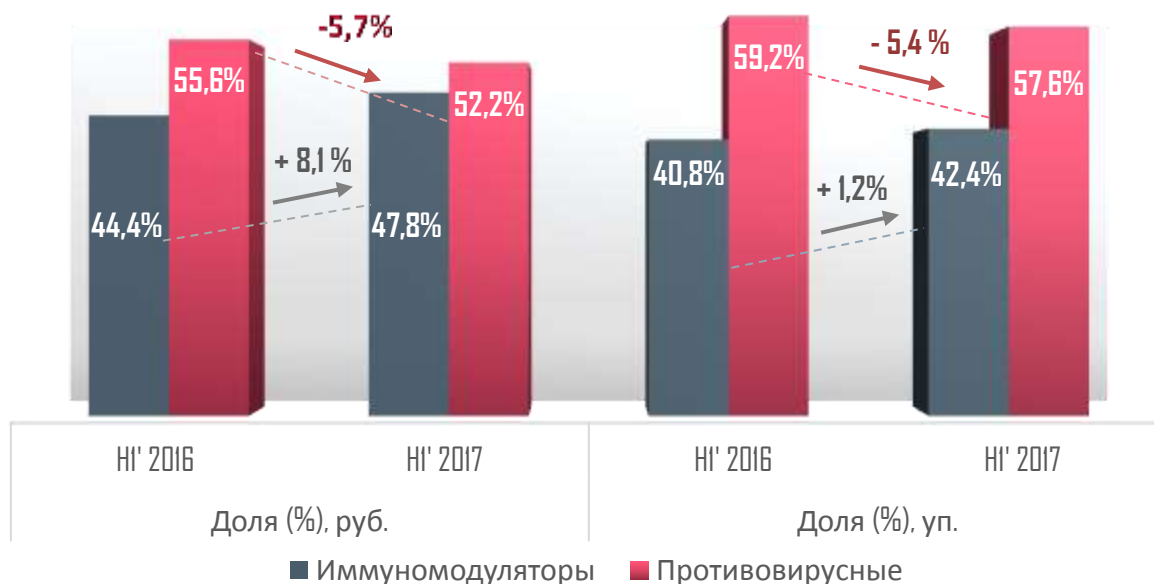
Drugs from other groups:

<b><i>EphMRA (code)</i></b>	<b><i>EphMRA (name)</i></b>	<b><i>Brand</i></b>
<b>A13A</b>	General purpose tonics	Trekresan
<b>D6D</b>	Local antibacterial and antiviral drugs	Viferon
<b>D11A</b>	Other drugs for the treatments of skin diseases	Derinat
<b>R7X</b>	Other drugs for the treatment of respiratory system	Irs 19
<b>S1D</b>	Drugs for the treatment of eye diseases	Poludan

Immune response modifiers are used for the prevention and treatment of influenza; they activate the body's own defenses and can produce a quick and pronounced effect. The second group of drugs, however, is usually administered when the disease has already developed; they fight the pathogens and eliminate the cause of disease. These are antiviral agents.

Immune response modifiers had the share of 47.8% in terms of value in rubles in the period under review. The market for the group of drugs aimed at strengthening immune system, showed an increase of + 8.1% by volume and of + 1.2% by volume (Figure 1).

*The trends in the market of drugs for influenza treatment, based on the results of H1' 2017*



We can conclude from the data above that special attention is given to the prevention of influenza and colds. Immune response modifiers are the most popular, as they have a multipurpose effect and high efficiency in fighting diverse viruses, as well as bacteria.

Let us consider the rating of TOP-5 Immune response modifiers in H1 '2017 by value in rubles (Table 1). The group included 56 brands, with the capacity of 5.2 billion rubles and 44.8% of the share in of the general market of immune response modifiers in value terms.

*Rating of the TOP-5 immune response modifying drugs in value terms, based on the results of H1 '2017*

Rating	Change in rating	Brand	Manufacturer	Total value, billion rubles	Share in the segment (%)	Market trends YTD'6 2016/ YTD'6 2017
1	2	<b>Viferon</b>	Feron	1.4	11.8	6%
2	-	<b>Anaferon</b>	Materia Medica	1.2	10.4	-20%
3	3	<b>Cycloferon</b>	NTEF POLYSAN	1.0	8.9	22%
4	-	<b>Ocilococcinum</b>	Laboratory BOIRON	0.8	7.1	-19%
5	4	<b>Cytovir-3</b>	Cytomed	0.8	6.8	-2%
<b>TOP-5</b>				<b>5.2</b>	<b>44.8</b>	

Source: AlphaRM – Monitoring of retail sales of drugs in RF

Table 1

The product “Viferon” manufactured by “Feron” rose by 2 lines, occupying the leading position in the rating, with a sales share of 11.8%. "Viferon" is available in 3 dosage forms: for external use as gel and ointment, and for internal use as suppositories. The active substance alpha-2b human recombinant interferon has immune response modulating, antiviral and antiproliferative properties. “Anaferon” (AB: antibodies to human gamma interferon) manufactured by “Materia Medica” is on the second line of the rating, with the share of 10.4%. The drug stimulates the humoral and cellular immune response. Since the beginning of 2017, a new dosage form of "Anaferon" for children in drops for oral administration has appeared on the market. The brand "Cycloferon" (NTFF POLYSAN), which is the inducer of endogenous mixed type early interferon is the last of the three leading products. "Cycloferon" showed the maximum increase in the rating of TOP-5 (+ 22%), with a share of 8.9% in the group.

The homeopathic drug "Ocillococcinum" produced by the Laboratory BOIRON was on the fourth position in the rating, with a share of 7.1%. “Cytovir-3” followed it closely (with a share of 6.8%).

The share of antiviral drugs for the treatment of influenza (having a different mechanism of action and directly affecting the virus) was 52.2% in the first half of 2017 (Figure 1). During the period under review, the group included 23 brands. The antiviral drugs for the treatment of influenza have a negative trend of sales in rubles (-5.7%) and in volume (-5.4%).

The capacity of the TOP-5 drugs included in the pharmacotherapeutic group "Antiviral agents" (Table 2) reached 10.0 billion rubles. In comparison with the first half of 2016, minor changes occurred in the rating. “Ingavirin” (Valenta Pharmaceuticals) became the leader with a 24.0% share, overtaking “Kagocel” manufactured by “Niarmedic Plus” (20.2%). The antiviral mechanism of the action of "Ingavirin" is associated with the suppression of virus reproduction at the nuclear phase, and delayed migration of the newly synthesized NP of the virus from the cytoplasm to the nucleus.

#### ***Rating of the TOP-5 antiviral drugs in value terms, based on the results of H1 '2017***

<b><i>Rating</i></b>	<b><i>Change in rating</i></b>	<b><i>Brand</i></b>	<b><i>Manufacturer</i></b>	<b><i>Total value, billion rubles</i></b>	<b><i>Share in the segment (%)</i></b>	<b><i>Market trends YTD'6 2016/ YTD'6 2017</i></b>
1	1	<b>Ingavirin</b>	Valenta Pharmaceuticals	3.0	24.0	4%
2	-1	<b>Kagocel</b>	Niarmedic Plus	2.6	20.2	-16%
3	-	<b>Ergoferon</b>	Materia Medica	2.0	15.4	-5%
4	-	<b>Arbidol</b>	Otisipharm	1.5	11.6	-16%
5	-	<b>Amixin</b>	Pharm-standard	0.9	7.3	-24%
<b><i>TOP-5</i></b>				<b>10.0</b>	<b>78.5</b>	

Source: AlphaRM – Monitoring of retail sales of drugs in RF

Table 2

i YTD (Year to Date) represents the total amount of sales from the beginning of the year to the selected month inclusive.

Kagocel that has a pronounced antiviral effect by stimulating the production of late interferon, demonstrated a drop by -16%. The brand “Ergoferon” manufactured by “Materia Medica” is on the third line of the rating with a 15.4% share. The domestic antiviral drugs "Arbidol" (11.6%) and "Amixin" (7.3%) have not changed their positions in the ranking.

As the conclusion of the overview, it should be noted that the market of drugs for the treatment of influenza features a positive trend in value and a negative one in volume, from January to June 2017, which primarily affects the price. The weighted average per unit price of anti-influenza products increased by 3% and reached 346 rubles. The drugs manufactured domestically demonstrated the highest sales.

Last year, two new trade names were registered with the active substance "Oseltamivir" in the form of capsules: "Nomides" manufactured by "Pharmasynthez" in March and "Oseltamivir Canon" manufactured by "Canonpharma Production" in September 2016. Both drugs are domestic counterparts of "Tamiflu" ("F. Hoffmann-La Roche Ltd:), which is a reflection of the policy of import substitution. The weighted average price of "Oseltamivir Canon" with the sales actively growing both in value and in volume, was 1.5 times lower than the weighted average price of "Tamiflu" during the period under review. In the same period, the drug underwent a rebranding: its packaging and trade name changed to "Influcein", which can also significantly affect the market trends of this group in the new season.