

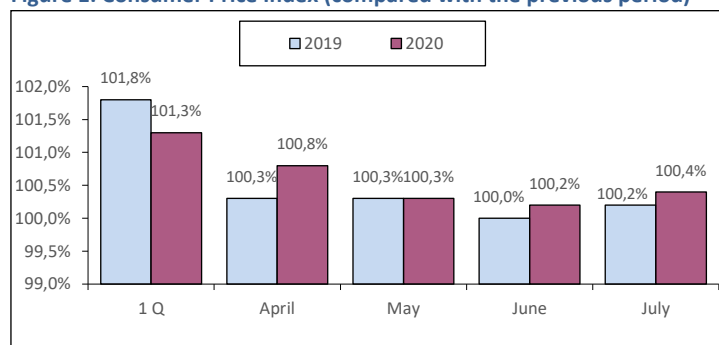
MACROECONOMIC INDICES

Inflation

According to Federal State Statistics Service's data, the Consumer Price Index was estimated as 100.4% in July 2020 compared to the previous month and 103.0% compared to December of the previous year.

In July 2020, Industrial Producer Price Index (for goods intended for sale on the domestic market) was 104.3%, whereas in the month-earlier period it had amounted to 106.1%. The index accounted for 99.1% against December of 2019.

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



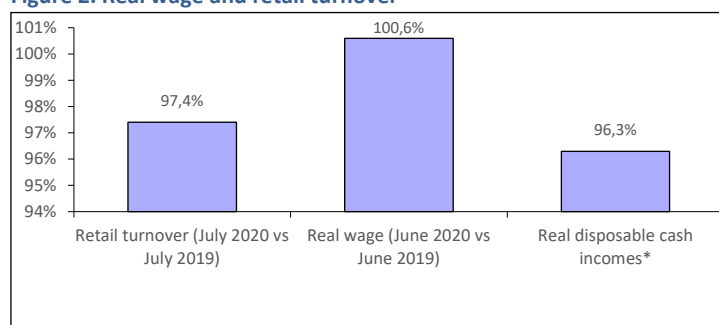
Living standard

In June 2020, a gross monthly average wage of corporate employees reached RUB 52,123 (USD 753.00). It accounted for 103.8% compared to June 2019, and 102.6% compared to the previous period. In June of 2019, the real gross wage accounted for 100.6% as compared to June of 2018, and 102.4% against the prior period. According to estimates¹, real disposable cash incomes decreased by 3.7% in the first half of 2020 compared to the first half of 2019 (Fig. 2).

Retail turnover

In July of 2020, the retail turnover was RUB 2843.2 bil. or 97.4% (at comparable prices) against the level of the same period of the previous year, RUB 18020.2 bil. or 94.2% in January-July of 2020 (Fig. 2).

Figure 2. Real wage and retail turnover



* First half of 2020 vs first half of 2019

Industrial Production

According to Federal State Statistics Service's data, in July 2020 Industrial Production Index accounted for 92.0% compared to the same period in the previous year, and 95.8% in January-July 2020.

According to Federal State Statistics Service's data, Industrial Production Index of drugs and medical products in July 2020 accounted for 107.6% compared to the relevant period of 2019, and 85.1% compared to June of 2020. In January-June 116.3% compared to January-June of 2019.

Domestic production

The top 10 domestic pharmaceutical manufacturers according to their volumes of sales in all segments of the market based on the results for July of 2020 is shown in Table 1.

Table 1. The top ten Russian chemical and pharmaceutical manufacturers by sales volume in July 2020

Rank	Manufacturer	RUB mil.
1	Biocad	2541.3
2	Otcpharm	2441.7
3	Microgen	2312.6
4	Stada	1895.7
5	Generium	1449.8
6	Pharmstandart	1418.3
7	Pharmasyntez	1033.1
8	Vertex	968.1
9	Akrihin	915.3
10	Sintez	909.5

Source - Remedium according to IQVIA data

Table 2 provides pharmacy sales data from 10 regions of the Russian Federation. Sales (in terms of roubles) increased in all regions in July 2020, compared to the previous month. The most pronounced growth in sales was observed in Voronezh region (+19%), the least one in Tatarstan (+0.5%). Decrease in sales was observed in Tumen (-5%).

Table 2. Pharmacy sales in the regions, 2020

Region	Pharmacy sales, \$ mil. (wholesale prices)			Growth gain, % (roubles)		
	April 2020	May 20	June 20	April/March 20	May/ April 20	June/ May 20
Moscow	158.2	119.2	131.2	-44%	-27%	5%
St. Petersburg	64.6	52.4	60.1	-24%	-22%	9%
Krasnodar Krai	28.6	25.7	31.2	-40%	-13%	16%
Krasnoyarsk Krai	19.7	17.0	20.9	-33%	-17%	18%
Tatarstan	16.9	19.5	20.5	-36%	11%	0.5%
Rostov Region	22.3	18.2	20.4	-30%	-21%	7%
Novosibirsk Region	18.2	15.9	18.0	-25%	-16%	8%
Voronezh Region	14.0	11.7	14.6	-30%	-19%	19%
Perm	5.1	6.0	7.3	-36%	15%	14%
Tyumen	6.6	5.8	5.8	-32%	-15%	-5%

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 July 2020

Rank	Company*	Quantity of broadcasts
1	Sandoz	6,561
2	Sanofi	6,287
3	Berlin-Chemie Menarini Group	4,520
4	Johnson & Johnson	4,272
5	Bayer	4,051

Source - Remedium according to Mediascope's data

Table 4. The top five brands in mass media in July 2020

Rank	Brand*	Quantity of broadcasts
1	Baneocin	2,134
2	Linex	2,000
3	Troxevasin	1,972
4	Aerius	1,963
5	Nicorette	1,934

Source - Remedium according to Mediascope's data

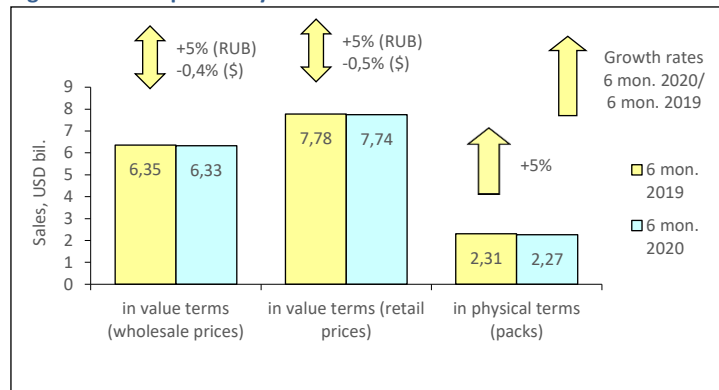
* Only products registered with State Register of Medicines were considered

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.

RUSSIAN PHARMACY FPP DRUG MARKET: 2020 FIRST SIX MONTHS RESULTS

According to the results of the Retail Audit of FPP (Finished Pharmaceutical Products) in Russian Federation™, at the end of the first half of 2020 the sales of drugs in natural terms in the country saw a 2% reduced to 2.266 bil. packs compared to the same period of 2019. In money terms, the market saw a 5% increase in terms of roubles and 0.4% decrease in terms of dollars. The volume of the market amounted to RUB 437.338 bil. (USD 6.326 bil.) at wholesale prices (Fig. 1). The average cost of an OTC pack proved higher than in the same period of the previous year (USD 3.37) and reached USD 3.42 in retail prices. Consumer spending for drugs in Russia averaged to USD 52.76 for the first six months of 2020, whereas during the same period a year ago it averaged to USD – 53.01.

Figure 1. Russia pharmacy market for 6 months of 2019 – 6 months 2020



According to the results for the first half of 2020, BAYER (+1%²) and SANOFI (+4%) hold the leading positions among manufacturers in the Russian pharmacy market in terms of sales, although due to the lagging dynamics, their market share slightly decreased (Tab. 1). The Russian OTCPHARM (+31%) that showed the highest growth rates moved up to rank three from six. At the same time, it displaced manufacturers STADA (-2%), SERVIER (+2%) and TEVA (-2%) one rank down. One more shift affected ranks seven and eight: the more dynamic manufacturer SANDOZ (+12%) moved up one rank, displacing KRKA (+5%) one rank down. ABBOTT (+5%) and BERLIN-CHEMIE/MENARINI (+3%) held their previous two ranks in the top ten ranking. In total, the top ten manufacturers accumulated 34.6% of the Russian market, as in the year-earlier period.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
3 mon. 2020	3 mon. 2019		3 mon. 2020	3 mon. 2019
1	1	BAYER	4.6	4.7
2	2	SANOFI	4.2	4.3
3	6	OTCPHARM	3.8	3.1
4	3	STADA	3.5	3.8
5	4	SERVIER	3.4	3.6
6	5	TEVA	3.3	3.6
7	8	SANDOZ	3.1	3.0
8	7	KRKA	3.0	3.0
9	9	ABBOTT	2.9	2.9
10	10	BERLIN-CHEMIE/MENARINI	2.7	2.8
Total			34.6	34.6

*AIPM members are in bold

Three newcomers broke into the ranks of the top ten brands ranking (Table 2). At the same time, ARBIDOL moved up to rank three from 47 due to a 3.2-fold increase in sales, while two others, PENTALGIN (+ 20%) and ELIQUIS (+ 36%), round out the top 10. The markets of the other two brands developed at a fast pace. INGAVIRIN (+59%) and MIRAMISTIN (+34%) moved up to ranks two and six. At the same time, DETRALEX (-2%) and NUROFEN (+ 5%) lost two ranking points each, while CONCOR (+ 1%) and MEXIDOL (-0.2%) moved three ranks down, to numbers seven and eight, respectively. XARELTO (+ 3%) holds rank number one. The total share of the top-ten increased by 1 p.p. and achieved 7.0%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
3 mon. 2020	3 mon. 2019		3 mon. 2020	3 mon. 2019
1	1	XARELTO	1.0	1.0
2	9	INGAVIRIN	0.8	0.5
3	47	ARBIDOL	0.8	0.2
4	2	DETRALEX	0.7	0.8
5	3	NUROFEN	0.7	0.7
6	10	MIRAMISTIN	0.7	0.5

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

Rank in the top ten		Brand	Share in total pharmacy sales, %	
3 mon. 2020	3 mon. 2019		3 mon. 2020	3 mon. 2019
7	4	CONCOR	0.6	0.7
8	5	MEXIDOL	0.6	0.6
9	11	PENTALGIN	0.6	0.5
10	16	ELIQUIS	0.6	0.4
Total			7.0	6.0

The most INNs from the top ten INNs and group names held their own in the ranking (Table 3). Among them are the top ten leaders XYLOMETAZOLINE (+ 2%), DIOSMIN * HESPERIDIN and IBUPROFEN (-1% each), as well as RIVAROXABAN (+ 3%), BISOPROLOL (+ 5%), PANCREATIN (+ 3%) and NIMESULIDE (+ 9%). On top of that, as before DICLOFENAC (+13%) held its previous rank nine. The only newcomer of the top ten, UMIFENOVIR, which purchases increased by three times, moved up to rank eight. ROSUVASTATIN (+3%), which had been placed at that rank earlier, moved down to rank ten. The total share of the top 10 increased from 9.4% to 9.8%.

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

Rank		INNs/Grouping Names	Share in total pharmacy sales, %	
3 mon. 2020	3 mon. 2019		3 mon. 2020	3 mon. 2019
1	1	XYLOMETAZOLINE	1.4	1.5
2	2	DIOSMIN*HESPERIDIN	1.0	1.1
3	3	IBUPROFEN	1.0	1.1
4	4	RIVAROXABAN	1.0	1.0
5	5	BISOPROLOL	1.0	1.0
6	6	PANCREATIN	1.0	1.0
7	7	NIMESULIDE	0.9	0.9
8	48	UMIFENOVIR	0.8	0.3
9	9	DICLOFENAC	0.8	0.7
10	8	ROSUVASTATIN	0.8	0.8
Total			9.8	9.4

C09 Agents acting on the rennin-angiotensin system (+16%) and M01 Anti-inflammatory and antirheumatic products (+4%) held their previous leading ranks in the top ten ATC groups ranking (Table 4). Group B1 Anticoagulants (+6%) held its previous rank four. Four pharmaceutical manufacturers of the top 10 rose in the ranks. J01 Antibacterials for systemic use (+10%) and N02 Analgesics (+15%) moved one rank up, coming in at numbers five and eight. The more dynamic J05 Antivirals for systemic use (+45%) moved up from rank seven to three. The only newcomer, R05 Cough and cold preparations (+ 5%), moved up to rank nine. At the same time, G03 Sex hormones and R01 Nasal preparations, which decreased sales by 1%, and C05 Vasoprotectors (-0.2%), which showed almost zero growth rates, on the contrary, moved down to lower ranks six, seven and ten, respectively. In total, the top ten ATC groups accumulated 37.3%, whereas the year-earlier period they accounted for 36%.

Table 4. The top ten ATC Groups by pharmacy sales

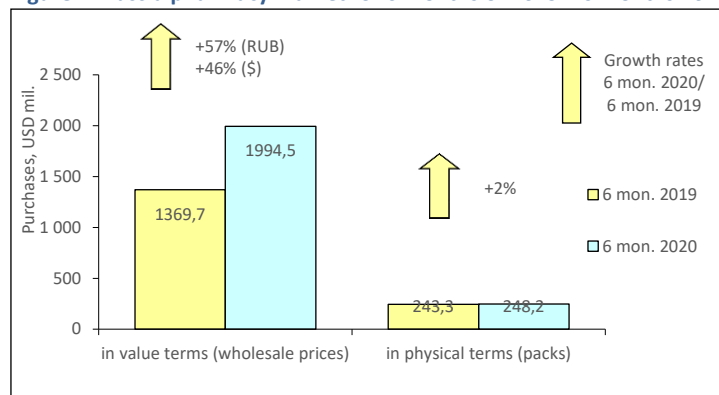
Rank		ATC code	ATC group	Share in total pharmacy sales, %	
3 mon. 2020	3 mon. 2019			3 mon. 2020	3 mon. 2019
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.6	5.1
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.8	4.8
3	7	J05	ANTIVIRALS FOR SYSTEMIC USE	4.1	3.0
4	4	B01	ANTITHROMBOTIC AGENTS	3.7	3.7
5	6	J01	ANTIBACTERIALS FOR SYST USE	3.6	3.4
6	3	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.5	3.7
7	5	R01	NASAL PREPARATIONS	3.3	3.5
8	9	N02	ANALGESICS	3.2	2.9
9	11	R05	COUGH AND COLD PREPARATIONS	2.8	2.8
10	8	C05	VASOPROTECTIVES	2.8	2.9
Total				37.3	36.0

Conclusion. Based on the results for the first half of 2020, the pharmacy retail market of the country brought in RUB 535.399 bil. (USD 7.742 bil.). The growth rates were positive in terms of roubles (+ 5%) and, albeit small, but negative (- 0.5%) in terms of dollars compared to the same period in 2019. In pack terms, the market reduced by 2% compared to the previous year and amounted to 2.266 bil. packs. In January-June 2020, the average cost of an FPP pack in the national pharmacies was USD 3.42, whereas in the year-earlier period it was USD 3.37. The average expenses of the Russian Federation residents for purchase of OTC drugs in pharmacies reduced as compared to the previous year (USD 52.76 vs. USD 53.01).

RUSSIAN FEDERATION HOSPITAL MARKET: 2020 FIRST SIX MONTHS RESULTS

According to the results of the Budget Audit of FPPs in the Russian Federation (without DLO and regional benefit)TM, based on the results for six months of 2020 the national hospital market extended by 2% in physical terms and amounted to 248.238 mil. packs. In value terms, the market showed a 57% increase in terms of roubles and 46% in terms of dollars and reached RUB 140.109 bil. (USD 1.994 bil.) at wholesale prices. Based on the results for January-June of 2020, the average price per FPP pack in the hospital sector of the country was USD 8.03, whereas in the year-earlier period its price was USD – 5.63.

Figure 1. Russia pharmacy market for 6 months of 2019 – 6 months 2020



Numerous shifts took place in top ten manufacturers ranking in the Russian hospital market based on the results for January-June 2020 (Table 1). The leader changed as well. MSD moved up to rank one from two, due to increase in sales by 2.4 times. ROCHE (2.3-fold increase in purchases) moved up to rank two from four. The last year leader BIOCAD (+50%) moved down to rank three. PHARMASINTEZ (2.8-fold growth), GLAXOSMITHKLINE (4-fold growth) and BRISTOL MYERS (2.9-fold growth) moved up to rank four through six respectively. Note that the two latter broke into the top 10 ranking for the first time. At the same time, the manufacturers SANOFI (+76%), PFIZER (+16%), JOHNSON & JOHNSON (+48%) and ABBVIE (+14%) moved down to the bottom part of the ranking. The total share of the top ten manufacturers increased by over 9 p.p. and accounted for 48.5%.

Table 1. The top 10 drug manufacturers by hospital purchases

Rank in the top ten		Manufacturer*	Share in total hospital purchases, %	
3 mon. 2020	3 mon. 2019		3 mon. 2020	3 mon. 2019
1	2	MSD	7.8	5.2
2	4	ROCHE	6.5	4.4
3	1	BIOCAD RF	6.2	6.5
4	9	PHARMASINTEZ	5.2	3.0
5	14	GLAXOSMITHKLINE	4.5	1.8
6	12	BRISTOL MYERS	4.2	2.3
7	6	SANOFI	4.2	3.8
8	3	PFIZER	3.4	4.5
9	7	JOHNSON & JOHNSON	3.3	3.6
10	5	ABBVIE	3.1	4.2
Total			48.5	39.3

*AIPM members are in bold

Most of the top 10 brands showed high growth rates and increased their purchases by two and more times, which allowed them to rise in the ranks (Tab. 2). However, four brands broke into the ranks of the top ten for the first time. One of them, TIVICAY moved up to rank one from 12 due to an increase in purchases by 5.4 times. Another three newcomers, PENTAXIM (2.3-fold growth), KADCYLA (2.1-fold growth) and KALIDAVIR (23-fold growth) moved up to rank seven and two bottom ranks, respectively. The markets of OPDIVO (2.8-fold growth), KEYTRUDA (2.7-fold growth), ISENTRESS (3-fold growth) and PERJETA (2.1-fold growth) developed at a fast pace, which allowed them to move up to the higher ranks two, three, five and six, respectively. At the same time, they displaced AVEGRA, whose purchases doubled, one point down, to rank four. And only HERTICAD (+23%) lagged behind the market growth, which led to a loss of six points. The total share of the top 10 brands in the hospital brands market expanded from 14% to 23.4%.

Table 2. The top 10 brands by hospital purchases

Rank in the top ten		Brand	Share in total hospital purchases, %	
3 mon. 2020	3 mon. 2019		3 mon. 2020	3 mon. 2019
1	12	TIVICAY	4.0	1.2
2	6	OPDIVO	3.2	1.8
3	4	KEYTRUDA	3.2	1.9
4	3	AVEGRA BIOCAD	2.4	1.9
5	10	ISENTRESS	2.3	1.2
6	7	PERJETA	1.9	1.5
7	11	PENTAXIM	1.8	1.2

Rank in the top ten		Brand	Share in total hospital purchases, %	
3 mon. 2020	3 mon. 2019		3 mon. 2020	3 mon. 2019
8	2	HERTICAD	1.7	2.2
9	14	KADCYLA	1.5	1.1
10	48	KALIDAVIR	1.4	0.0
Total			23.4	14.0

Following the respective brand, the newcomer DOLUTEGRAVIR became the leader of the top ten INNs and group names ranking, increasing its purchases by 5.4 times (Table 3). The second newcomer VACCINE, ACEL.PERT.DIP.TET. POLIO & HIB (2.3-fold growth) moved up to rank nine. In addition to them, another four INNs from the top ten ranking rose in the ranks. So, NIVOLUMAB moved up to rank two from seven (2.8-fold growth), and PEMBROLIZUMAB (2.7-fold growth) moved up to rank three from five, and RALTEGRAVIR (3-fold growth) moved up to rank six from ten. The combination LOPINAVIR*RITONAVIR (2-fold growth) improved its position by only one point, moving up to rank five. Note that apart from the leader, the markets of another two brand names of the top ten developed their markets at a fast pace. These are PERTUZUMAB (2.1-fold growth), which kept its previous rank 8, and BEVACIZUMAB (+91%), which lost one ranking point, being displaced by more dynamic names. TRASTUZUMAB (+36%) and SODIUM (+29%) moved down to the lower ranks, seven and the last one due to lagging rates. The total share accumulated by the top-ten INNs and grouping names increased from 17.3% to 25.2%.

Table 3. The top 10 INNs and grouping names by hospital purchases

Rank		INNs/Grouping Names	Share in total hospital purchases, %	
3 mon. 2020	3 mon. 2019		3 mon. 2020	3 mon. 2019
1	13	DOLUTEGRAVIR	4.0	1.2
2	7	NIVOLUMAB	3.2	1.8
3	5	PEMBROLIZUMAB	3.2	1.9
4	3	BEVACIZUMAB	2.5	2.0
5	6	LOPINAVIR*RITONAVIR	2.4	1.9
6	10	RALTEGRAVIR	2.3	1.2
7	1	TRASTUZUMAB	2.3	2.7
8	8	PERTUZUMAB	1.9	1.5
9	11	VACCINE, ACEL.PERT.DIP.TET. POLIO & HIB	1.8	1.2
10	4	SODIUM	1.6	2.0
Total			25.2	17.3

The top ten ATC groups ranking showed high stability (Table 4). It did not change in composition, and six of the top ten ATC groups held their own in the ranking. Among them are L01 Antineoplastic agents (+81%), J05 Antivirals for systemic use (2.6-fold growth in purchases), J07 Vaccines (+52%), J01 Antibacterials for systemic use (+58%), B05 Plasma and perfusion solutions and B01 Anticoagulants (+21% each) placed at the top ranks. Some moves took place in the bottom part of the top-10 ranking as well. The groups L04 Immunosuppressants (+53%) and L02 Endocrine therapy (+72%), which showed higher growth rates, moved up to ranks seven and eight, while the less dynamic J04 Antimycobacterials (+17%) and V08 Contrast media (+25%) moved down to the bottom ranks. In total, the top ten ATC groups accumulated 81.4% of the hospital market, whereas in the year-earlier period - 73.4%.

Table 4. The top ten ATC groups by hospital purchases

Rank		ATC code	ATC group	Share in total hospital purchases, %	
3 mon. 2020	3 mon. 2019			3 mon. 2020	3 mon. 2019
1	1	L01	ANTINEOPLASTIC AGENTS	33.4	29.0
2	2	J05	ANTIVIRALS FOR SYSTEMIC USE	18.3	11.3
3	3	J07	VACCINES	7.5	7.8
4	4	J01	ANTIBACTERIALS FOR SYST USE	6.6	6.5
5	5	B05	PLASMA SUBSTITUTES AND PERFUSION SOLUTIONS	3.9	5.1
6	6	B01	ANTITHROMBOTIC AGENTS	3.1	4.0
7	8	L04	IMMUNOSUPPRESSANTS	2.4	2.5
8	10	L02	ENDOCRINE THERAPY	2.4	2.2
9	7	J04	ANTIMYCOBACTERIALS	2.0	2.7
10	9	V08	CONTRAST MEDIA	1.9	2.4
Total				81.4	73.4

Conclusion. At the end of the first three months of 2020, the Russian hospital market showed high positive growth rates both in rouble terms (+57%) and in dollar terms (+46%) and brought in RUB 140.109 bil. (USD 1.994 bil.). In pack terms the market also showed positive growth rates though not so high (+2%) and achieved 248.238 mil. packs. At the end of the first half of 2020, the average cost of a finished pharma product (FPP) pack in the national hospital sector amounted to USD 8.03 vs. USD 5.63 in 2019.

PHARMACEUTICAL MARKET OF THE CENTRAL FEDERAL DISTRICT (CFD) IN 1-2 QUARTER OF 2020 KEY PERFORMANCE INDICATORS

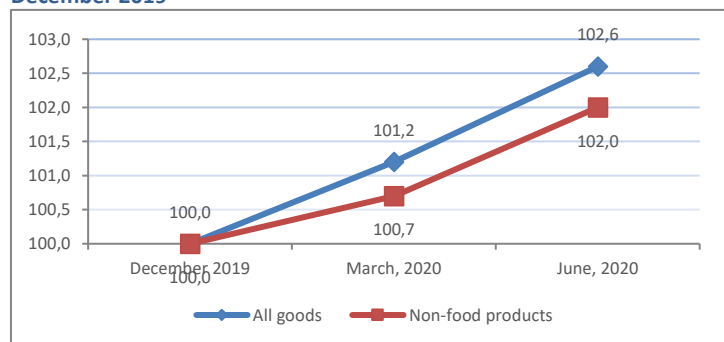
Macroeconomic indices

Table 1: Recent statistical data on socio-economic situation in CFD

Value	June-January 2020	June-January 2020 (%) as % against June-January 2019
Industrial production index		102.2
Retail turnover, RUB bil.	5,309.8	94.2
Monthly average accrued wage per one worker (nominal), RUB	62,866	105.9
real		103.2

Note: CFD TOGS data

Figure 1. Movement of price index and non-food product price index vs December 2019



Indicators of movement of price and retail margins

Figure 1. Dynamics of weighted average prices and retail margins in 1-2 Q 2019 – 1-2 Q 2020

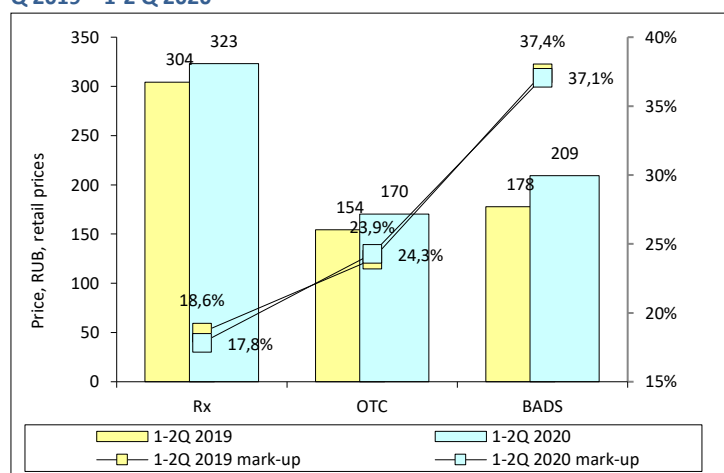
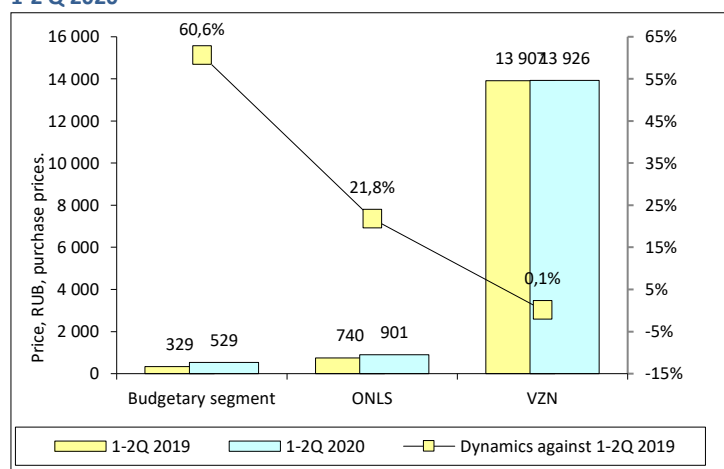


Figure 2. Dynamics of weighted average purchase prices in 1-2 Q, 2019 – 1-2 Q 2020



Indicators of the dynamics and structure of the market³

Figure 3. CFD pharmaceutical market in Q 1-2, 2019 – 1-2 Q 2020

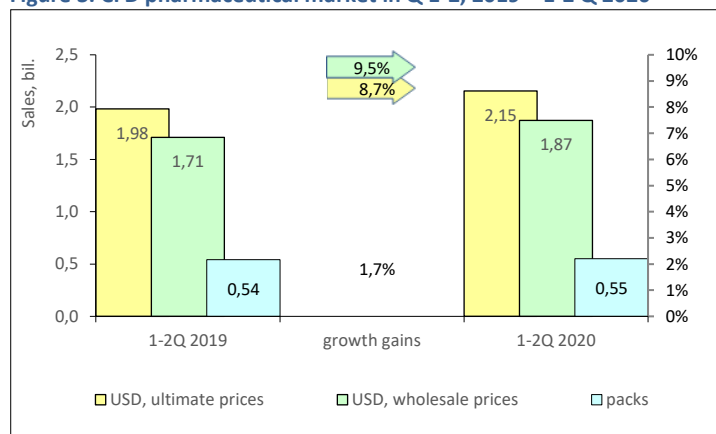


Figure 4. Structure of CFD pharmaceutical market by major segments in Q 1-2, 2019 – 1-2 Q 2020

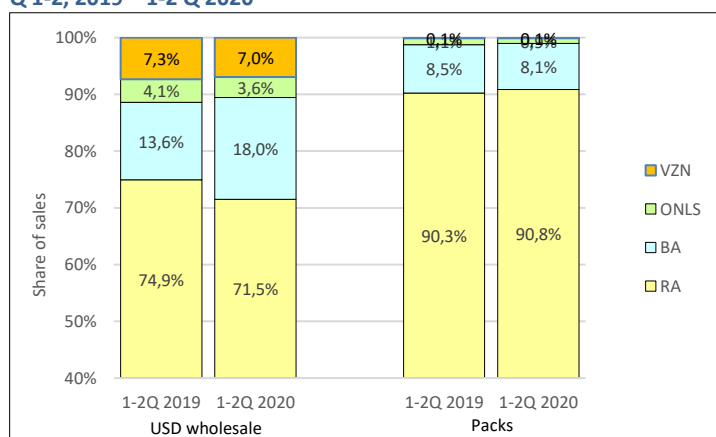


Figure 5. Structure of the retail segment of CFD market in Q 1-2, 2019 – 1-2 Q 2020

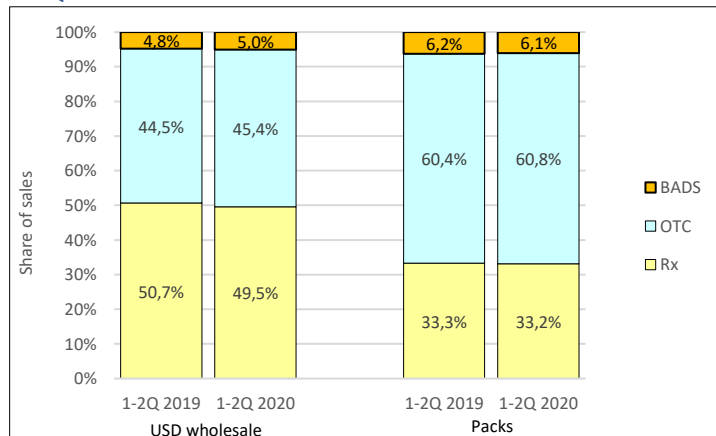
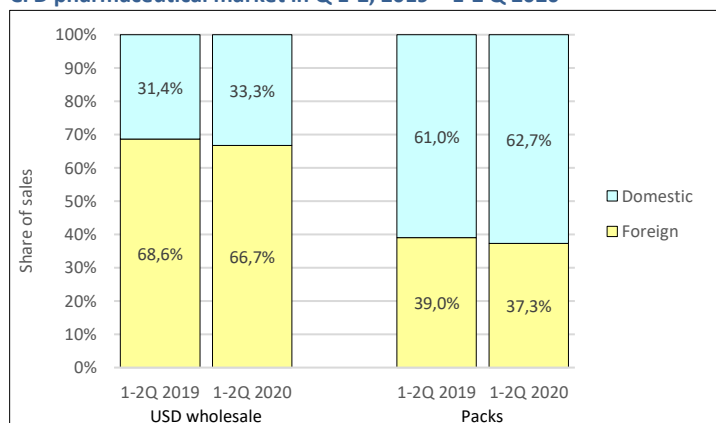


Figure 6. Dynamics of the Russian/ foreign drugs share in the structure of CFD pharmaceutical market in Q 1-2, 2019 – 1-2 Q 2020



³ Exclusive of Moscow

PHARMACEUTICAL MARKET OF THE NORTH-WESTERN FEDERAL DISTRICT (NWFD) IN 1-2 Q, 2020 KEY PERFORMANCE INDICATORS

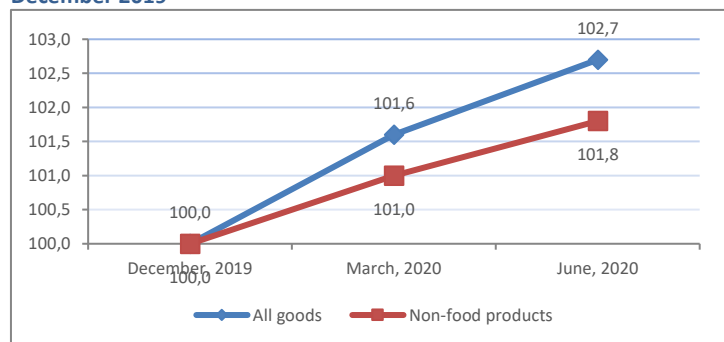
Macroeconomic indices

Table 1: Recent statistical data on socio-economic situation in NWFD

Value	June-January 2020	June-January 2020 (%) as % against June-January 2019
Industrial production index		96.6
Retail turnover, RUB bil.	1,553.8	95.7
Monthly average accrued wage per one worker (nominal), RUB	55,313	104.4
real		101.4

Note: NWFD TOGS data

Figure 1. Movement of price index and non-food product price index vs December 2019



Indicators of movement of price and retail margins

Figure 1. Dynamics of weighted average prices and retail margins in 1-2 Q 2019 – 1-2 Q 2020

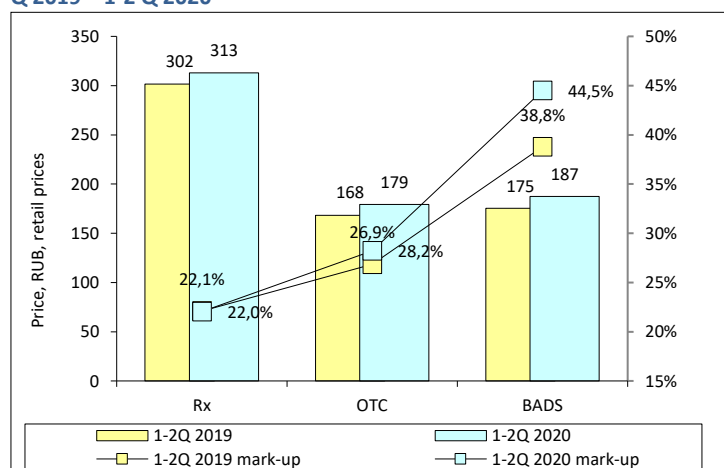
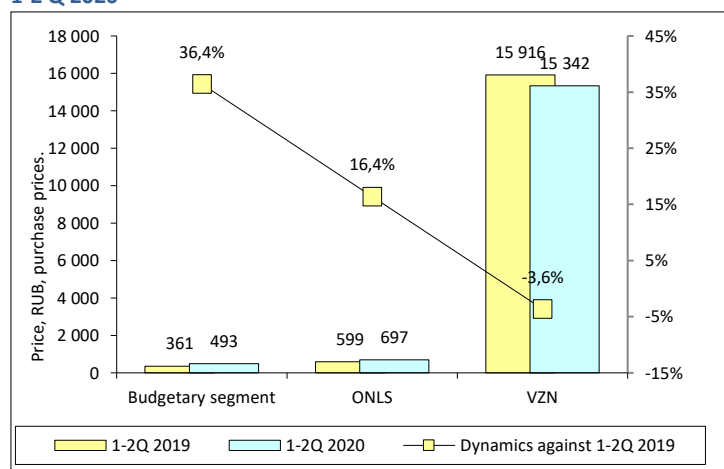


Figure 2. Dynamics of weighted average purchase prices in 1-2 Q, 2019 – 1-2 Q 2020



Indicators of the dynamics and structure of the market⁴

Figure 3. NWFD pharmaceutical market in Q 1-2, 2019 – 1-2 Q 2020

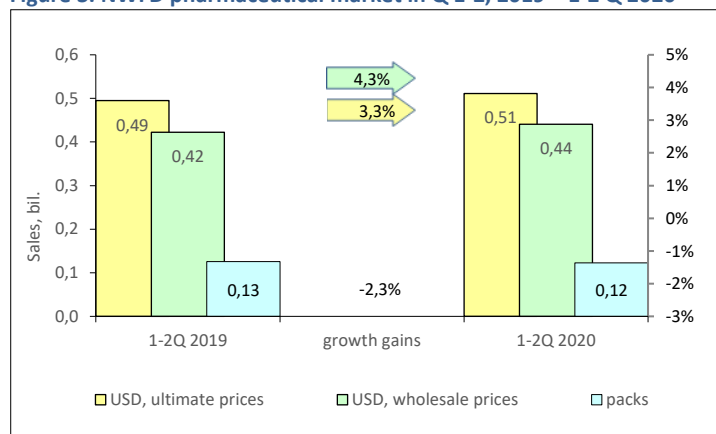


Figure 4. Structure of NWFD pharmaceutical market by major segments in Q 1-2, 2019 – 1-2 Q 2020

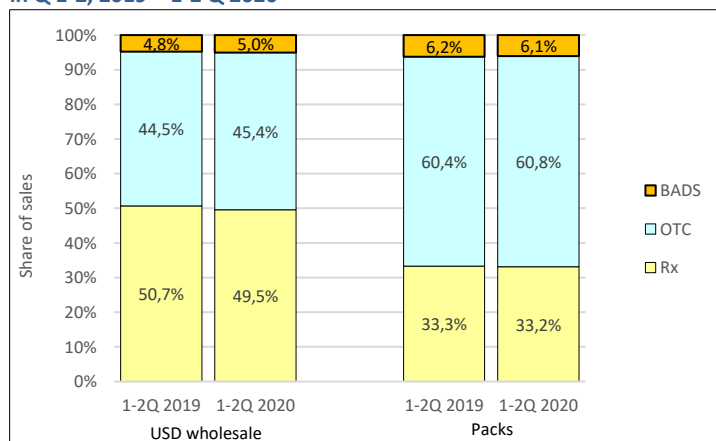


Figure 5. Structure of the retail segment of NWFD market in Q 1-2, 2019 – 1-2 Q 2020

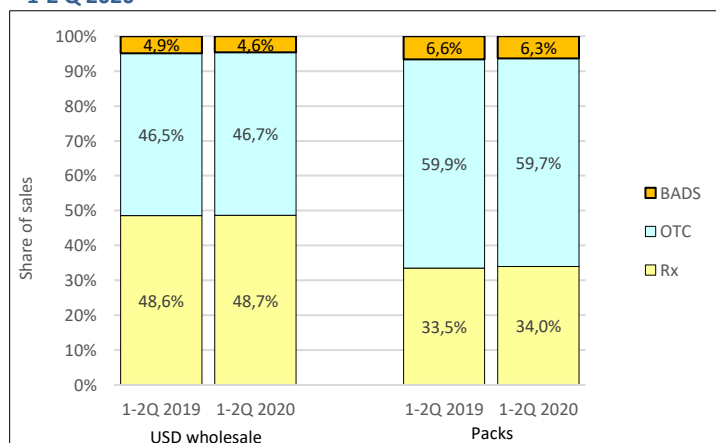
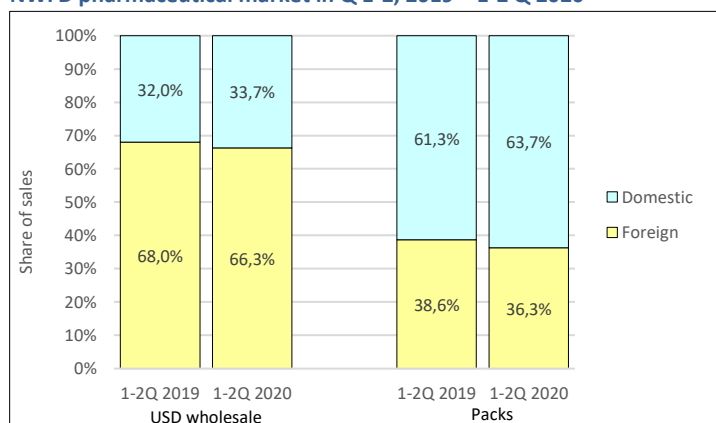


Figure 6. Dynamics of the Russian/ foreign drugs share in the structure of NWFD pharmaceutical market in Q 1-2, 2019 – 1-2 Q 2020



⁴ Exclusive of St. Petersburg

PHARMACEUTICAL MARKET OF THE VOLGA FEDERAL DISTRICT (VFD) IN Q 1-2 OF 2020 KEY PERFORMANCE INDICATORS

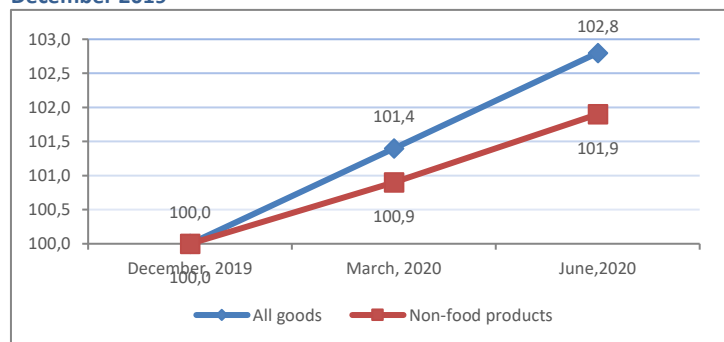
Macroeconomic indices

Table 1: Latest statistical data on socio - economic situation in VFD

Value	June-January 2020	June-January 2020 (%) as % against June-January 2019
Industrial production index		96.0
Retail turnover, RUB bil.	2,639.9	94.0
Monthly average accrued wage per one worker (nominal), RUB	35,589	105.4
real		102.6

Note: VFD TOGS data

Figure 1. Movement of price index and non-food product price index vs December 2019



Indicators of movement of price and retail margins

Figure 1. Dynamics of weighted average prices and retail margins in 1-2 Q 2019 – 1-2 Q 2020

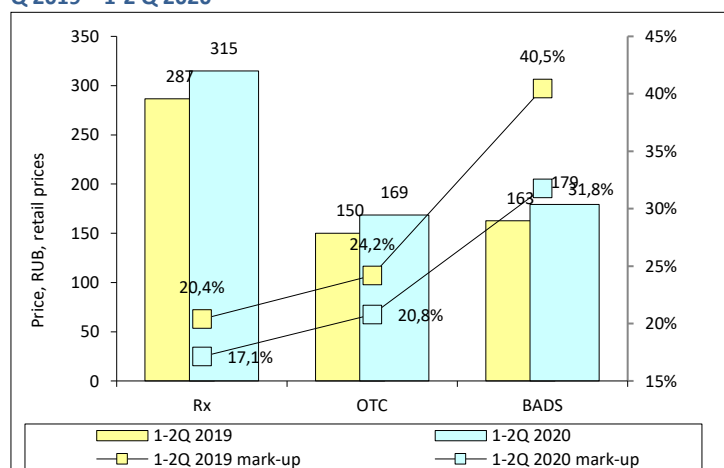
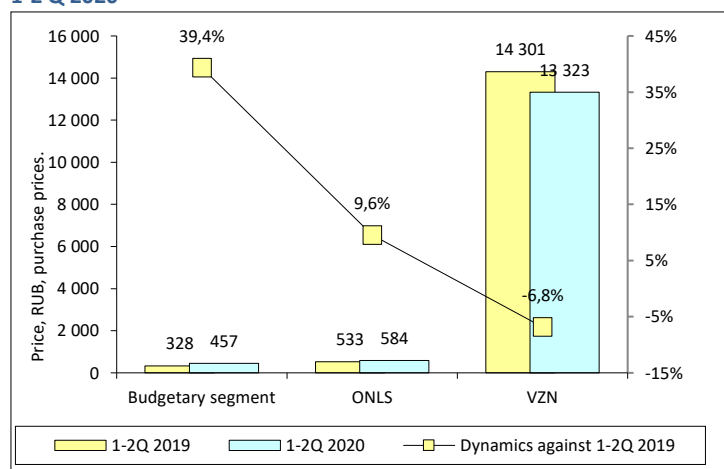


Figure 2. Dynamics of weighted average purchase prices in 1-2 Q, 2019 – 1-2 Q 2020



Indicators of the movement and structure of the market

Figure 3. VFD pharmaceutical market in Q 1-2, 2019 – 1-2 Q 2020

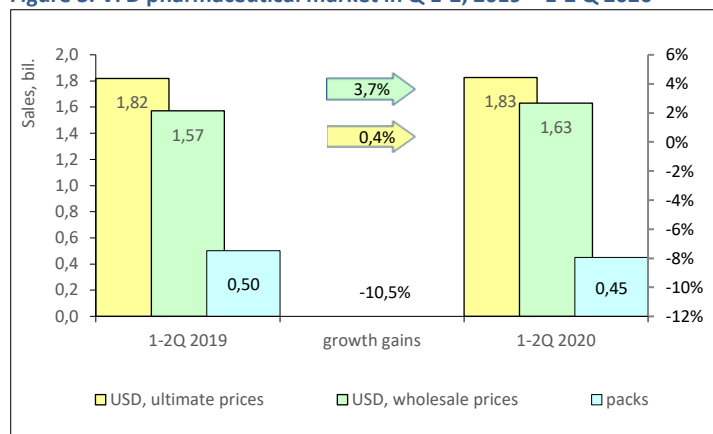


Figure 4. Structure of PFD pharmaceutical market by major segments in Q 1-2, 2019 – 1-2 Q 2020

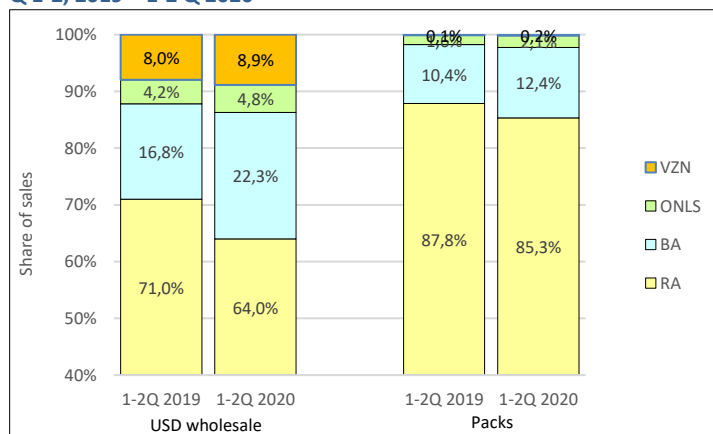


Figure 5. Structure of the retail segment of VFD market in Q 1-2, 2019 – 1-2 Q 2020

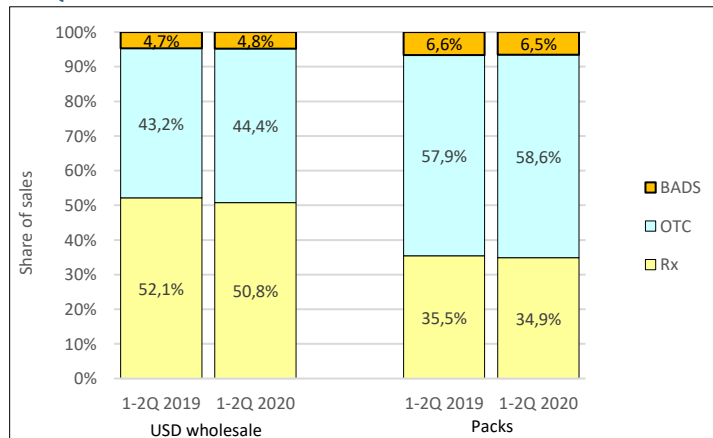
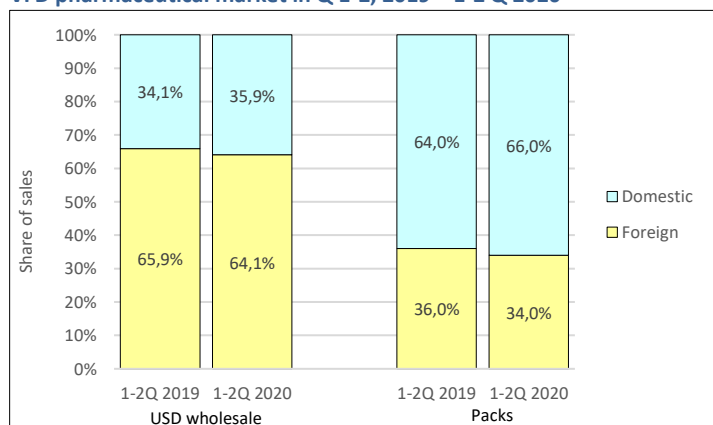


Figure 6. Dynamics of the Russian/foreign drugs share in the structure of VFD pharmaceutical market in Q 1-2, 2019 – 1-2 Q 2020



PHARMACEUTICAL MARKET OF THE URAL FEDERAL DISTRICT (UFD) IN 1-2 Q, 2020 KEY PERFORMANCE INDICATORS

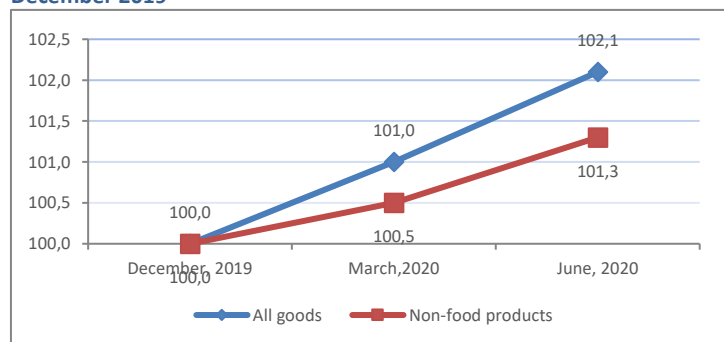
Macroeconomic indices

Table 1: Recent statistical data on socio-economic situation in UrFD

Value	June-January 2020	June-January 2020 (%) as % against June-January 2019
Industrial production index		99.0
Retail turnover, RUB bil.	1,344.3	96.1
Monthly average accrued wage per one worker (nominal), RUB	53,587	105.7
real		103.0

Note: VFD TOGS data

Figure 1. Movement of price index and non-food product price index vs December 2019



Indicators of movement of price and retail margins

Figure 1. Dynamics of weighted average prices and retail margins in 1-2 Q 2019 – 1-2 Q 2020

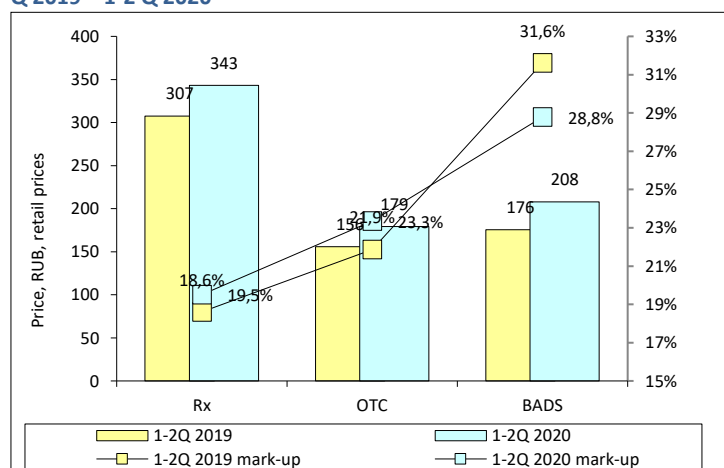
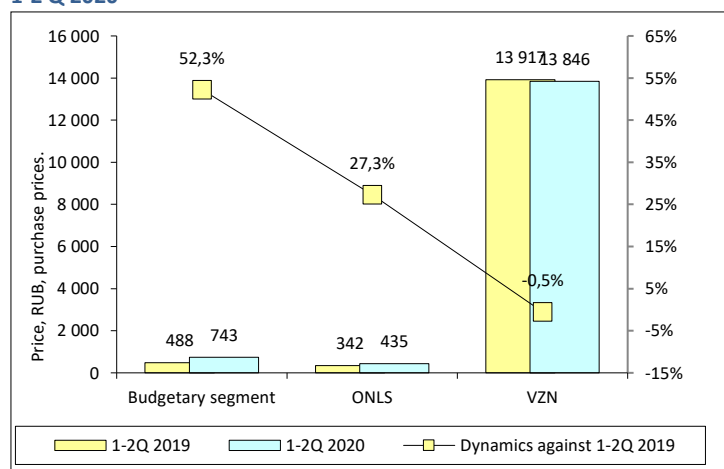


Figure 2. Dynamics of weighted average purchase prices in 1-2 Q 2019 – 1-2 Q 2020



Indicators of the movement and structure of the market

Figure 3. UrFD pharmaceutical market in 1-2 Q 2019 – 1-2 Q 2020

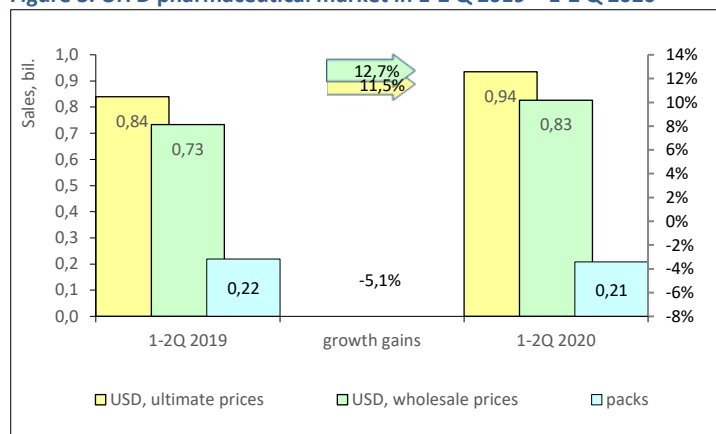


Figure 4. Structure of UrFD pharmaceutical market by major segments in 1-2 Q 2019 – 1-2 Q 2020

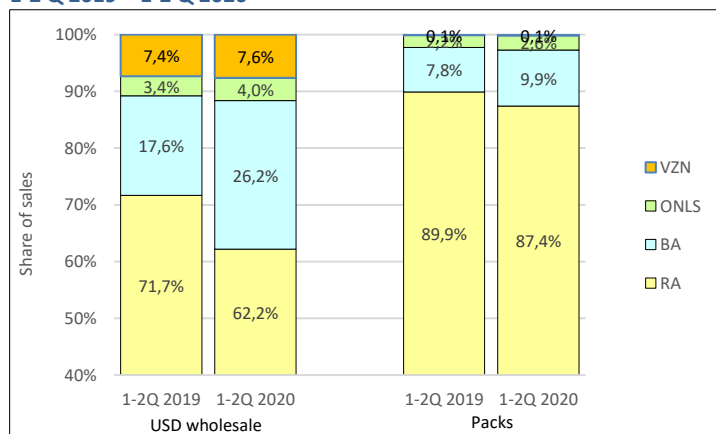


Figure 5. Structure of the retail segment of UrFD market in Q 1-2 2019 – 1-2 Q 2020

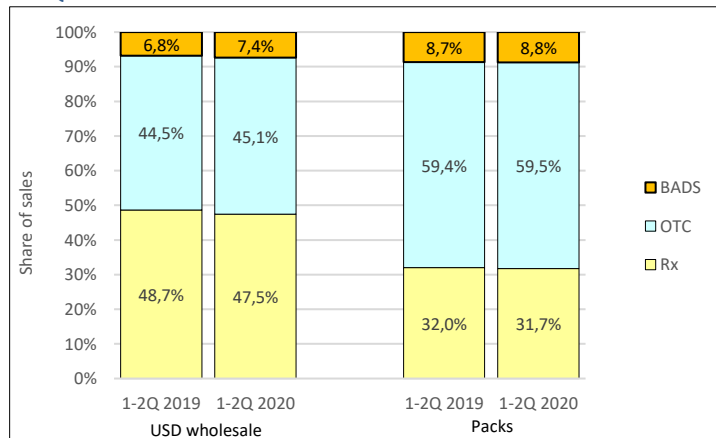
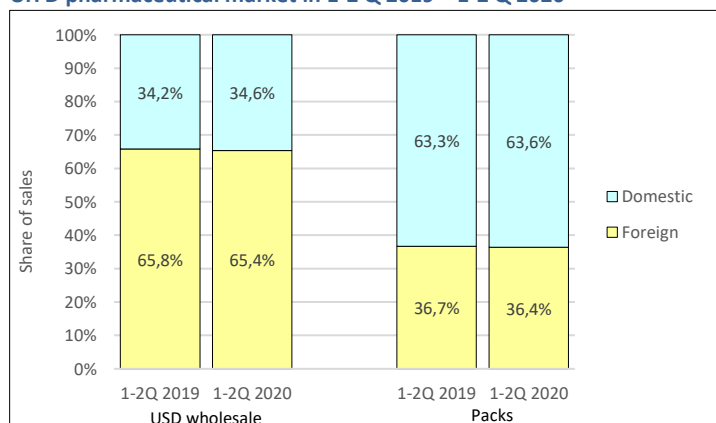


Figure 6. Dynamics of the Russian/ foreign drugs share in the structure of UrFD pharmaceutical market in 1-2 Q 2019 – 1-2 Q 2020



PHARMACEUTICAL MARKET OF THE SIBERIA FEDERAL DISTRICT (SFD) IN 1-2 Q OF 2020 KEY PERFORMANCE INDICATORS

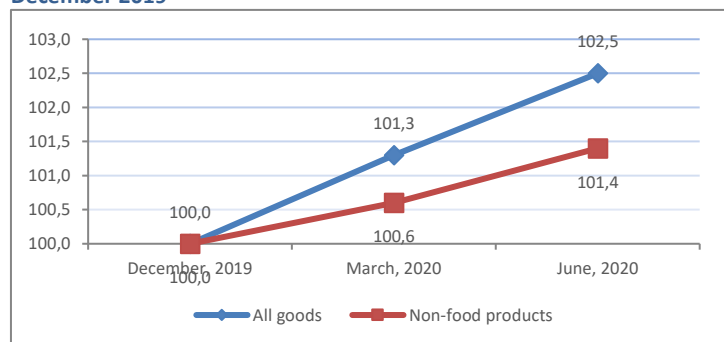
Macroeconomic indices

Table 1: Recent statistical data on socio-economic situation in SiFD

Value	June-January 2020	June-January 2020 (%) as % against June-January 2019
Industrial production index		95.9
Retail turnover, RUB bil.	1,351.6	94.9
Monthly average accrued wage per one worker (nominal), RUB	42,845	105.9
real		102.7

Note: SiFD TOGS data

Figure 1. Movement of price index and non-food product price index vs December 2019



Indicators of movement of price and retail margins

Figure 1. Dynamics of weighted average prices and retail margins in 1-2 Q 2019 – 1-2 Q 2020

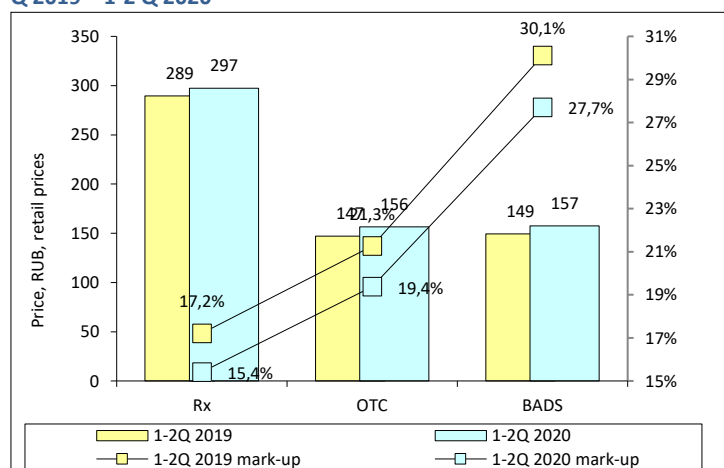
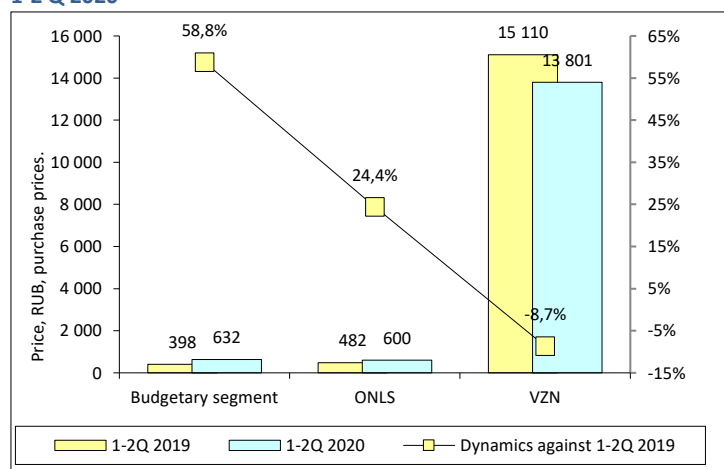


Figure 2. Dynamics of weighted average purchase prices in 1-2 Q 2019 – 1-2 Q 2020



Indicators of the movement and structure of the market

Figure 3. SFD pharmaceutical market in 1-2 Q 2019 – 1-2 Q 2020

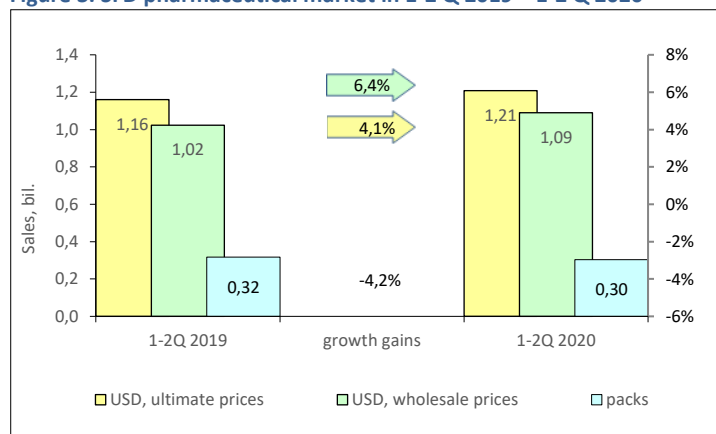


Figure 4. Structure of SiFD pharmaceutical market by major segments in 1-2 Q 2019 – 1-2 Q 2020

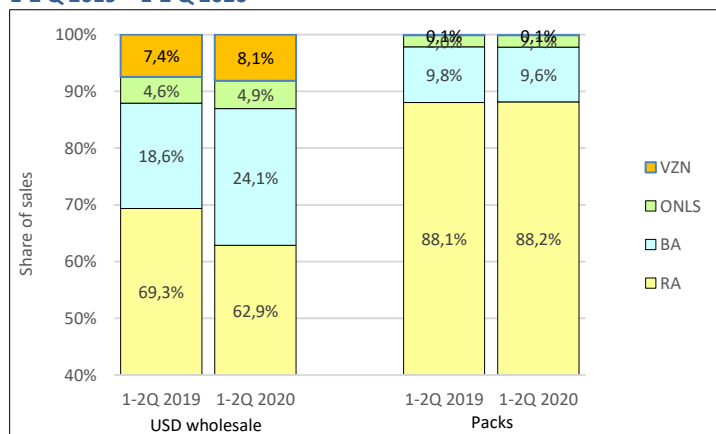


Figure 5. Structure of the retail segment of SiFD market in 1-2 Q 2019 – 1-2 Q 2020

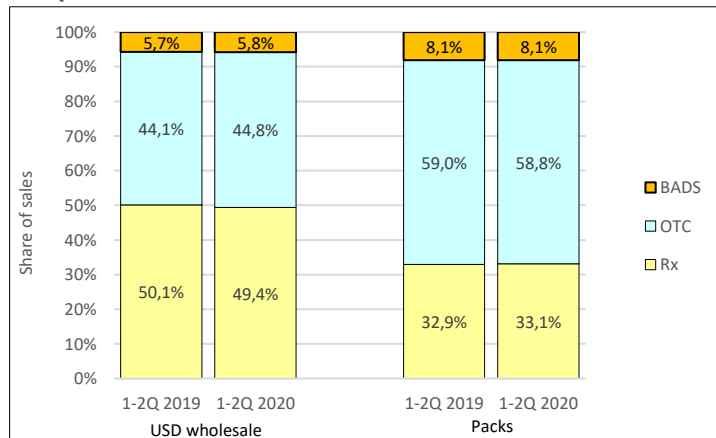
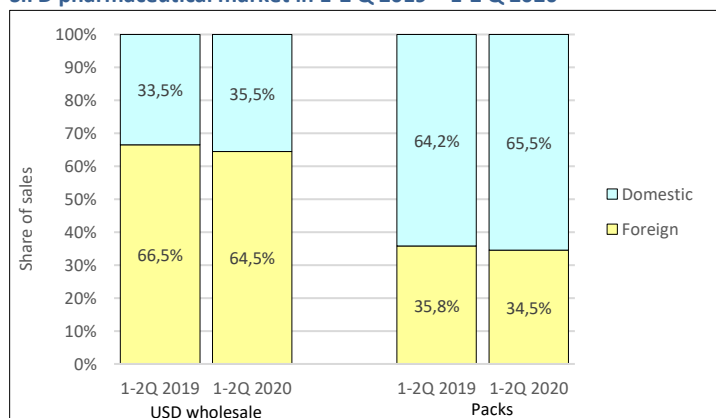


Figure 6. Dynamics of the Russian/ foreign drugs share in the structure of SiFD pharmaceutical market in 1-2 Q 2019 – 1-2 Q 2020



PHARMACEUTICAL MARKET OF THE SOUTHERN FEDERAL DISTRICT (SoFD) IN 1-2 Q OF 2020 KEY PERFORMANCE INDICATORS

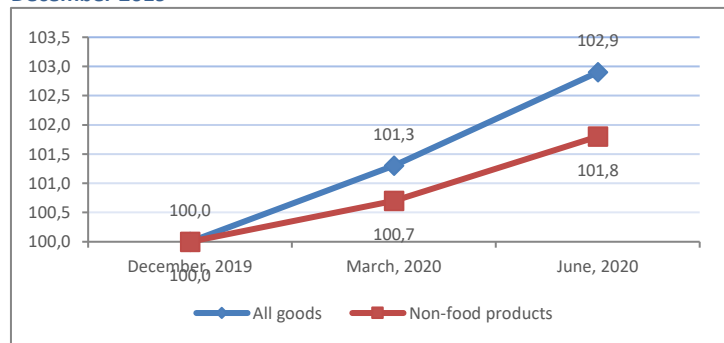
Macroeconomic indices

Table 1: Recent statistical data on socio-economic situation in SoFD

Value	June-January 2020	June-January 2020 (%) as % against June-January 2019
Industrial production index		98.2
Retail turnover, RUB bil.	1,491.7	91.4
Monthly average accrued wage per one worker (nominal), RUB	35,260	105.3
real		102.8

Note: SoFD TOGS data

Figure 1. Movement of price index and non-food product price index vs December 2019



Indicators of movement of price and retail margins

Figure 1. Dynamics of weighted average prices and retail margins in 1-2 Q 2019 – 1-2 Q 2020

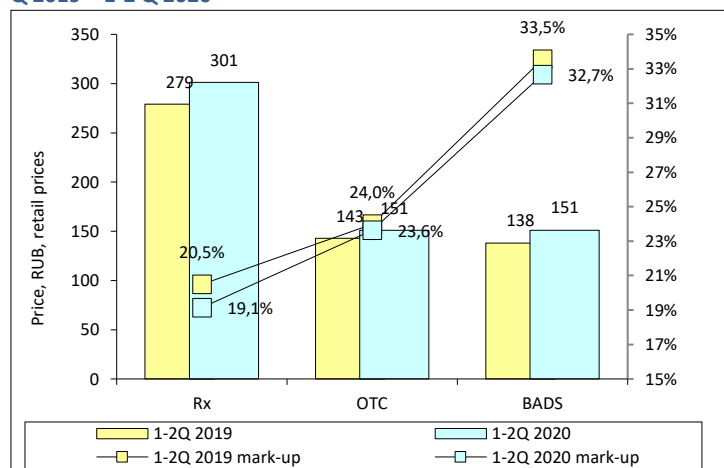
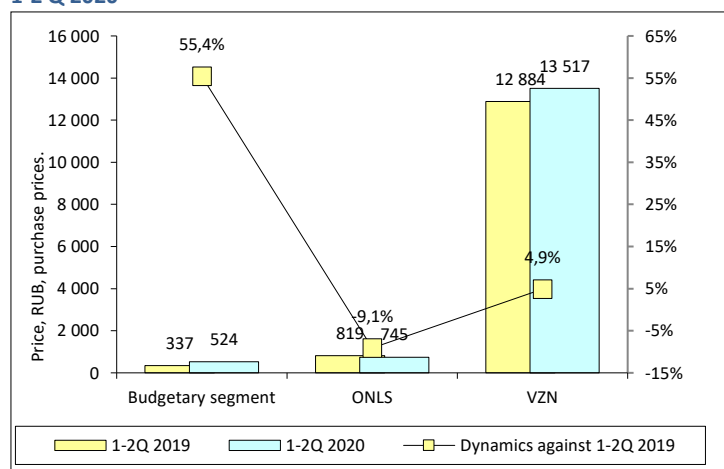


Figure 2. Dynamics of weighted average purchase prices in 1-2 Q 2019 – 1-2 Q 2020



Indicators of the movement and structure of the market

Figure 3. SoFD pharmaceutical market in 1-2 Q 2019 – 1-2 Q 2020

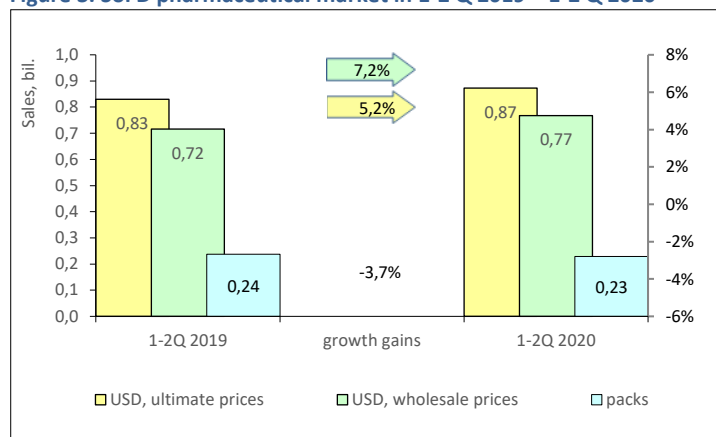


Figure 4. Structure of SoFD pharmaceutical market by major segments in 1-2 Q 2019 – 1-2 Q 2020

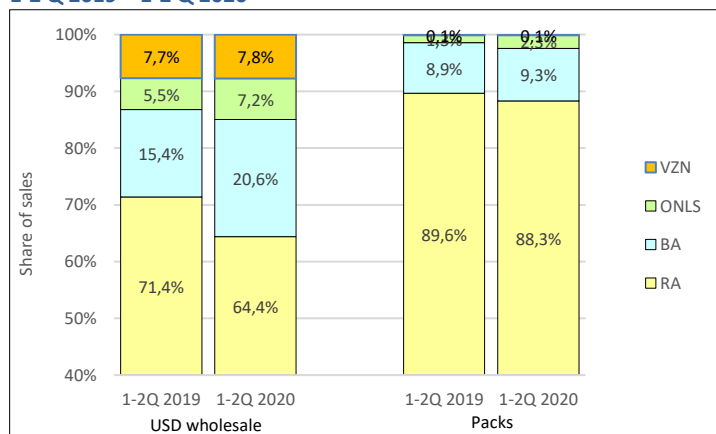


Figure 5. Structure of the retail segment of SoFD pharmaceutical market in 1-2 Q 2019 – 1-2 Q 2020

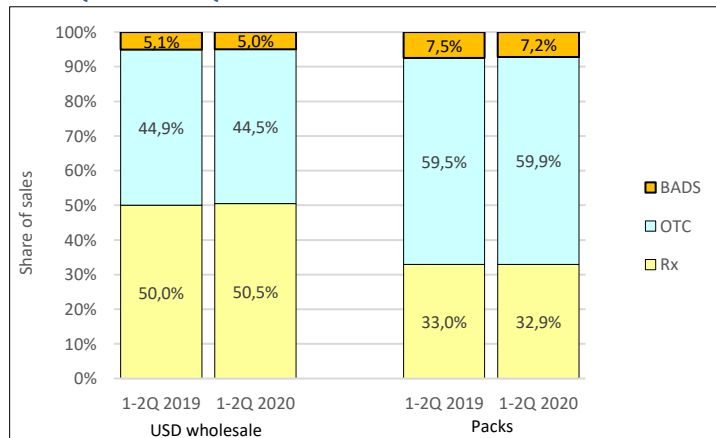
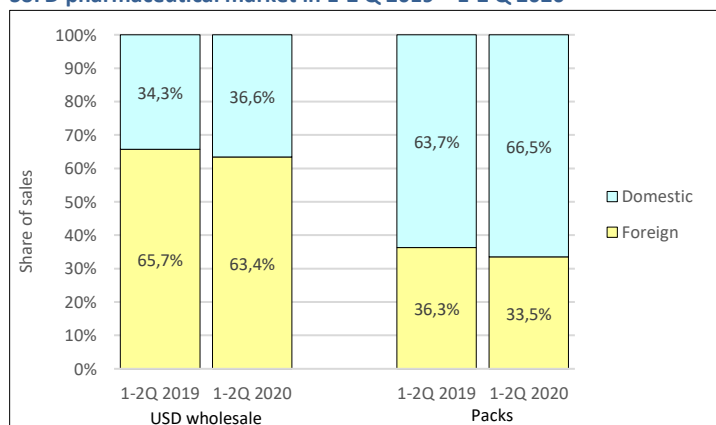


Figure 6. Dynamics of the Russian/ foreign drugs share in the structure of SoFD pharmaceutical market in 1-2 Q 2019 – 1-2 Q 2020



PHARMACEUTICAL MARKET OF THE FAR EASTERN FEDERAL DISTRICT (FEFD) IN 1-2 Q OF 2020 KEY PERFORMANCE INDICATORS

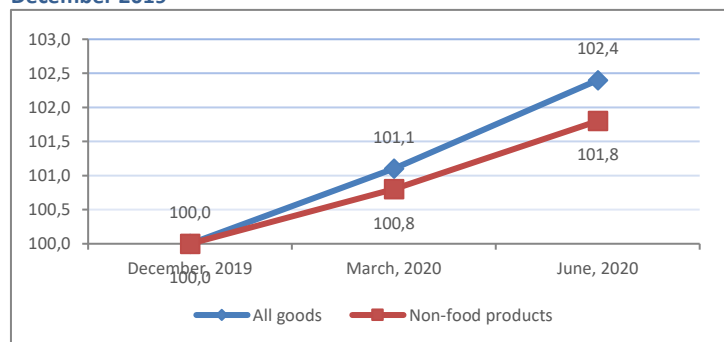
Macroeconomic indices

Table 1: Recent statistical data on socio - economic situation in FEFD

Value	June-January 2020	June-January 2020 (%) as % against June-January 2019
Industrial production index		98.0
Retail turnover, RUB bil.	840.2	94.0
Monthly average accrued wage per one worker (nominal), RUB	58,335	106.2
real		102.5

Note: FEFD TOGS data

Figure 1. Movement of price index and non-food product price index vs December 2019



Indicators of movement of price and retail margins

Figure 1. Dynamics of weighted average prices and retail margins in 1-2 Q 2019 – 1-2 Q 2020

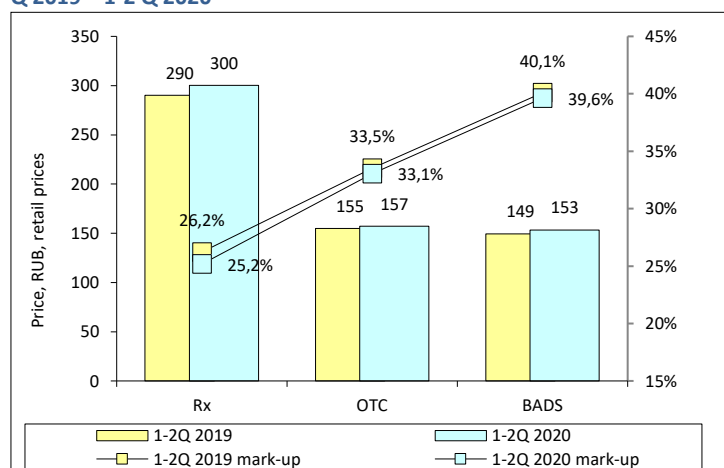
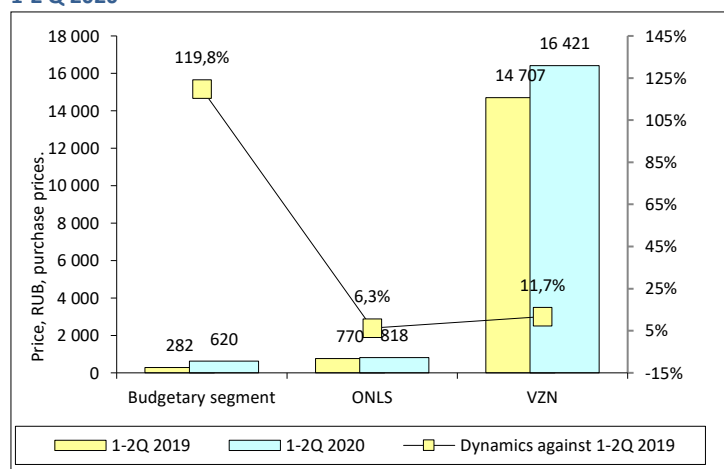


Figure 2. Dynamics of weighted average purchase prices in 1-2 Q 2019 – 1-2 Q 2020



Indicators of the movement and structure of the market

Figure 3. FEFD pharmaceutical market in 1-2 Q 2019 – 1-2 Q 2020

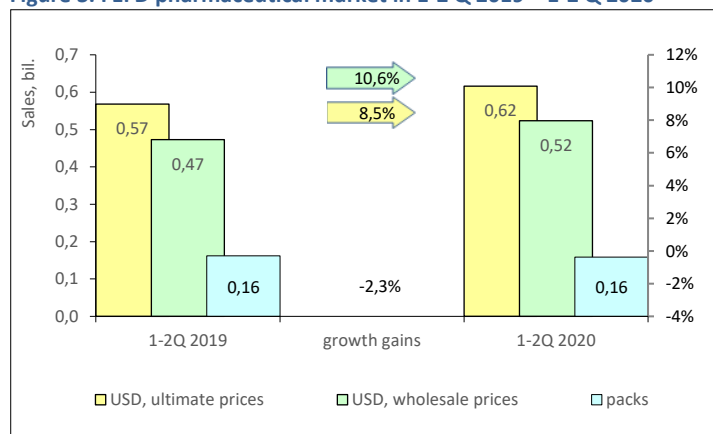


Figure 4. Structure of FEFD pharmaceutical market by major segments in 1-2 Q 2019 – 1-2 Q 2020

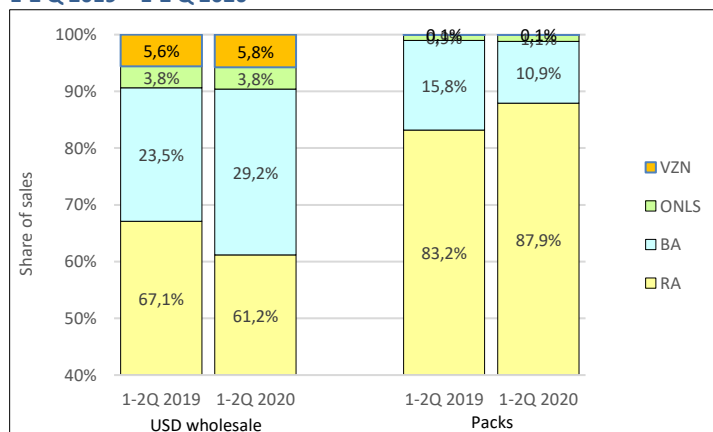


Figure 5. Structure of the retail segment of FEFD pharmaceutical market in 1-2 Q 2019 – 1-2 Q 2020

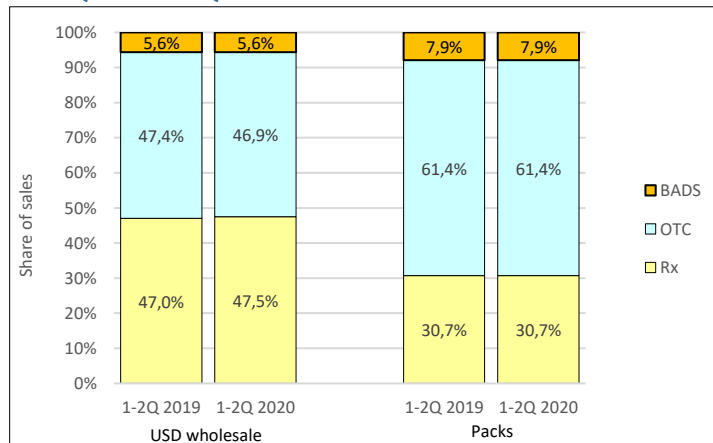


Figure 6. Dynamics of the Russian/ foreign drugs share in the structure of FEFD pharmaceutical market in 1-2 Q 2019 – 1-2 Q 2020

