

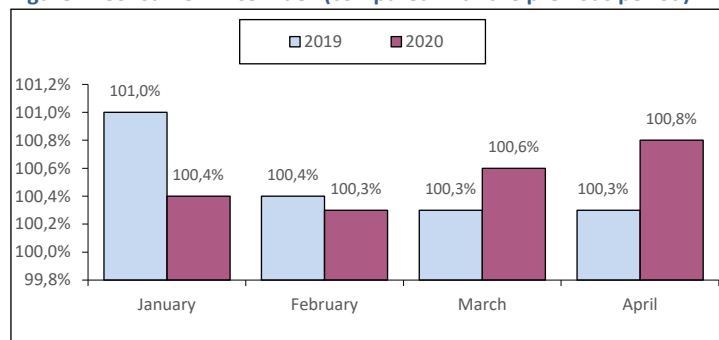
MACROECONOMIC INDICES

Inflation

According to Federal State Statistics Service's data, the Consumer Price Index was estimated as 100.8% in April 2020 compared to the previous month and 102.1% compared to December of the previous year.

In April of 2020, Industrial Producer Price Index (for goods intended for sale on the domestic market) was 92.8%, whereas in the month-earlier period it had amounted to 98.7%. The index accounted for 92% against December of 2019.

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



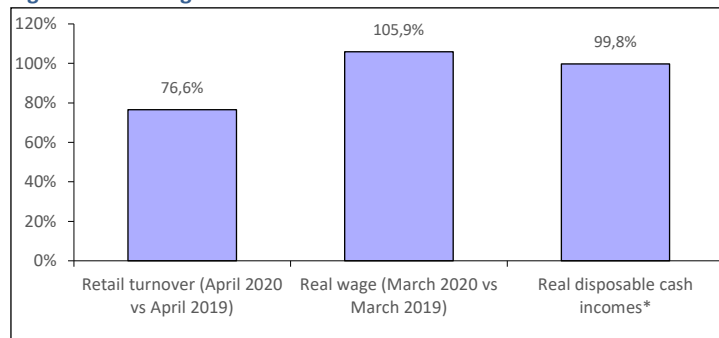
Living standard

In March of 2020, a gross monthly average wage of corporate employees reached RUB 50926 (USD 696.19). It accounted for 108.6% compared to March 2019, and 107.7% compared to the previous period. In March of 2020, the real gross wage accounted for 105.9% as compared to March of 2019, and 107.1% against the prior period. According to estimates¹, real disposable cash incomes decreased by 0.2% in the first quarter of 2020 compared to the first quarter of 2019 (Fig. 2).

Retail turnover

In April 2020, the retail turnover was equal to RUB 2104.2 bil or 76.6% (in comparable prices) against the level of the same period of the previous year, and RUB 10282.9 bil. or 97.2% in January - April 2020 (Fig. 2).

Figure 2. Real wage and retail turnover



* Quarter I 2020 vs Quarter I 2019

Industrial Production

According to Federal State Statistics Service's data, in April 2020 Industrial Production Index accounted for 93.4% compared to the same period in 2014, and 99.4% in January-April 2020. According to Federal State Statistics Service's data, Industrial Production Index for drugs and medical products in April 2020 accounted for 113.5% compared to the same period in 2019, and 112.3% in January-April vs. January-April 2019.

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 April 2020.

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

Rank	Manufacturer	RUB mil.
1	Otcpharm	2823.9
2	Biocad	2702.9
3	Pharmasyntez	2194.4
4	Pharmstandard	2042.2
5	Stada	1891.4
6	Generium	1517.2
7	Valenta	993.9
8	Akrihin	954.6
9	Vertex	917.2
10	Veropharm	824.8

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 March 2020 compared to the previous month, and most of them showed high increase. The most pronounced growth in sales was observed in Moscow (+69%), the least one in Perm (+8%).

Table 2. Pharmacy sales in the regions, 2020

Region	Pharmacy sales, \$ mil. (wholesale prices)			Growth gain, % (roubles)		
	January 2010	February 2020	March 2020	January 20/ December 19	February/January 20	March / February 20
Moscow	159.3	195.8	288.7	-32%	27%	69%
St. Petersburg	63.6	76.8	87.7	-15%	25%	31%
Krasnodar Krai	39.0	41.5	48.8	-5%	10%	35%
Krasnoyarsk Krai	29.5	27.6	30.2	-13%	-3%	26%
Tatarstan	16.5	26.8	27.0	-14%	68%	15%
Rostov Region	23.2	27.3	32.6	-6%	22%	37%
Novosibirsk Region	18.9	24.1	24.8	-0.1%	32%	18%
Voronezh Region	11.6	16.8	20.5	-19%	50%	39%
Perm	5.8	8.6	8.1	-1%	54%	8%
Tyumen	6.0	9.3	10.0	-9%	60%	22%

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 April 2020

Rank	Company*	Quantity of broadcasts
1	Otcpharm	12,658
2	Bayer AG	8,475
3	Teva	8,144
4	Sanofi	7,924
5	Sandoz	7,817

Source - Remedium according to Mediascope's data

Table 4. Top five brand names in mass media in April, 2020

Rank	Brand*	Quantity of broadcasts
1	Evalar	3,918
2	Ingavirin	2,846
3	Exoderil	2,766
4	Baneocin	2,429
5	Essentiale	2,270

Source - Remedium according to Mediascope's data

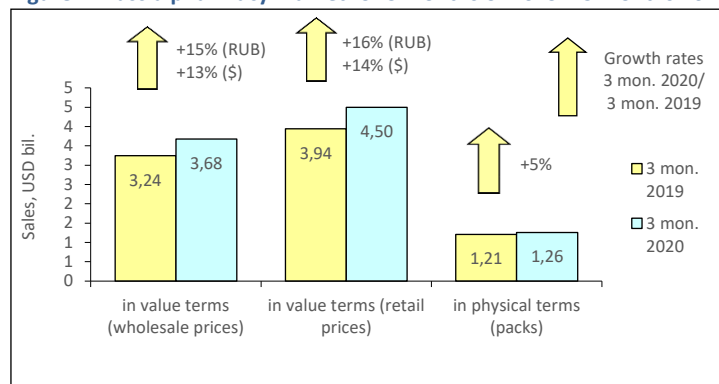
* Only products registered with State Register of Medicines were considered

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: FIRST THREE MONTHS RESULTS 2020

According to the results of the Retail Audit of FPP (Finished Pharmaceutical Products) in Russian Federation™, at the end of the first quarter of 2020 the sales of drugs in natural terms in the country saw a 5% increase to 1.261 bil. packs compared to the same period of 2019. In money terms, the market saw a 15% increase in terms of roubles and 13% in terms of dollars. The volume of the market amounted to RUB 245.753 bil. (USD 3.678 bil.) at wholesale prices (Fig. 1). The average cost of a pack increased as compared to a year earlier (USD 3.27) and reached USD 3.57 at retail prices. Consumer spending for drugs in Russia averaged to USD 30.65 for the first three months of 2020, whereas during the same period a year ago it averaged to USD 26.83.

Figure 1. Russia pharmacy market for 3 months of 2019 – 3 months 2020



According to the results of January-March 2020, BAYER (+ 10%² and SANOFI (+ 9%) remain the leaders among manufacturers in terms of sales in the Russian pharmacy market (Tab. 1). OTCPHARM (+26%), the most dynamic manufacturer of the top-10, moved up to rank three. Rating progress was demonstrated by SERVIER (+ 14%) and ABBOTT (+ 17%), which moved up to ranks five and eight, as well as GLAXOSMITHKLINE (+ 20%), which broke into the top ten rating for the first time. At the same time, the less dynamic STADA (+ 8%), TEVA (+ 5%) and KRKA (+ 13%), in contrast, moved down to the lower ranks four, six and ten. SANDOZ (+15%) continued to hold its previous rank seven. In total, the top ten manufacturers accumulated 33.9% of the Russian market, whereas in the year— earlier period they accounted for 34.3%.

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	4.4	4.5
2	2	SANOFI	4.0	4.2
3	5	OTCPHARM	3.7	3.4
4	3	STADA	3.6	3.8
5	6	SERVIER	3.3	3.3
6	4	TEVA	3.2	3.5
7	7	SANDOZ	3.1	3.1
8	9	ABBOTT	2.9	2.9
9	11	GLAXOSMITHKLINE	2.9	2.8
10	8	KRKA	2.9	2.9
Total			33.9	34.3

*AIPM members are in bold

INGAVIRIN (+39%) moved up to rank one from three of the top ten brands rating, displacing the last year leader XARELTO (+14%) one rank down (Table 2). The newcomer of the top ten MIRAMISTIN (+63%) moved up to rank three. Due to 2.1-fold growth in rates, another newcomer of the top ten ARBIDOL moved up to rank five from the third ten. Apart from the above, another brand managed to rise in the ranks. THERAFLU (+25%) moved up two ranks, to number seven. At the same time, the less dynamic DETRALEX (+20%), CONCOR (+15%) and MEXIDOL (+11%), as well as KAGOCCEL (-21%), which reduced its sales, in contrast, moved down to the lower rank six and the last three bottom ranks. And only NUROFEN (+11%) kept its previous rank four. The total share of the top-ten increased by 0.5 p.p. and achieved 7.1%.

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	3	INGAVIRIN	1.0	0.8
2	1	XARELTO	0.9	1.0
3	11	MIRAMISTIN	0.8	0.5
4	4	NUROFEN	0.8	0.7
5	27	ARBIDOL	0.7	0.4
6	5	DETRALEX	0.7	0.6
7	9	THERAFLU	0.6	0.6
8	6	CONCOR	0.6	0.6

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
9	7	MEXIDOL	0.6	0.6
10	2	KAGOCCEL	0.6	0.8
Total			7.1	6.6

The most INNs from the top ten INNs and group names held their own in the ranking (Table 3). Among them were the leaders of the top ten XYLOMETAZOLINE (+13%), IBUPROFEN (+5%) and PANCREATIN (+12%). On top of that, BISOPROLOL (+17%), NIMESULIDE (+23%) and ROSUVASTATIN (+19%) held their previous ranks six, eight and ten. INNs IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID (+39%) and MIRAMISTIN (+62%) that showed high sales growth rates moved up to ranks four and nine. Note that the latter became the only newcomer of the top 10 ranking. At the same time, INN RIVAROXABAN (+14%) moved one rank down, and the composition DIOSMIN*HESPERIDIN (+15%) lost two ranks. The total share of the top-ten INNs and grouping names 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	1.6	1.6
2	2	IBUPROFEN	1.0	1.1
3	3	PANCREATIN	1.0	1.0
4	9	IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID	1.0	0.8
5	4	RIVAROXABAN	0.9	1.0
6	6	BISOPROLOL	0.9	0.9
7	5	DIOSMIN*HESPERIDIN	0.9	0.9
8	8	NIMESULIDE	0.9	0.8
9	20	MIRAMISTIN	0.8	0.6
10	10	ROSUVASTATIN	0.8	0.8
Total			9.8	9.4

The dominant three groups held their own in the ten top ATC group rating (Table 4). Groups C09 Drugs acting on the renin-angiotensin system (+ 24%), M01 Anti-inflammatory and anti-rheumatic drugs (+ 15%) and J05 Antivirals for systemic use (32%) have maintained and strengthened their leading positions in the Russian market. R05 Cough and cold preparations (+13%) also held their previous rank seven in the ranking. The four INNs of the top ten rose in the ranks. R01 Nasal preparations (+18%) and N02 Analgesics (+17%) moved one rank up, coming in at numbers four and eight. Group B1 Anticoagulants (+ 16%) moved from rank eight to six, and its only newcomer L03 Immunostimulants (+ 22%) moved up to the last rank in the top 10 rating. On the contrary, due to lagging growth rates J01 Antibacterials for systemic use (+ 13%) and G03 Sex hormones (+ 7%) moved to the lower ranks. In total, the top ten ATC groups accumulated 38.4%, whereas the year-earlier period they accounted for 37.4%.

Table 4. The top ten ATC Groups by pharmacy sales

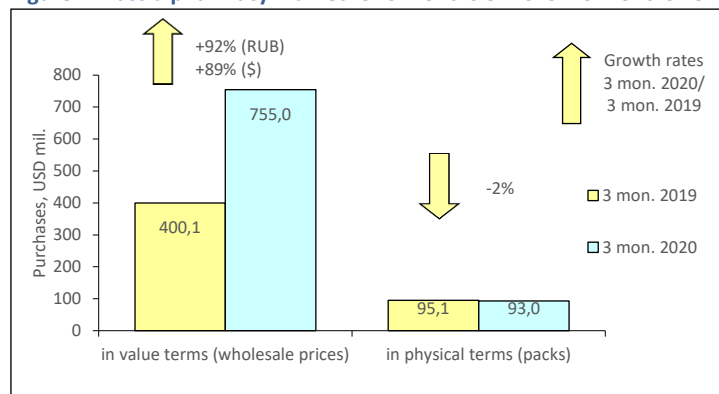
Rank		ATC code	ATC group	Share in total pharmacy sales, %	
3 mon. 2020	3 mon. 2019			3 mon. 2020	3 mon. 2019
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.3	4.9
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.7	4.7
3	3	J05	ANTIVIRALS FOR SYSTEMIC USE	4.7	4.0
4	5	R01	NASAL PREPARATIONS	3.8	3.7
5	4	J01	ANTIBACTERIALS FOR SYST USE	3.7	3.8
6	8	B01	ANTITHROMBOTIC AGENTS	3.5	3.5
7	7	R05	COUGH AND COLD PREPARATIONS	3.5	3.5
8	9	N02	ANALGESICS	3.3	3.2
9	6	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.3	3.5
10	14	L03	IMMUNOSTIMULANTS	2.7	2.5
Total				38.4	37.4

Conclusion. On the basis of the results for the first quarter 2020, the pharmacy retail market of the country brought in RUB 300.584 bil. (USD 4.497 bil.), which is 16% more in terms of roubles and 14% in terms of dollars as compared to the indicators of 2019. In pack terms, the market reduced by 5% compared to the previous year and amounted to 1.261 bil. packs. In January-March 2020, the average cost of an FPP pack in the national pharmacies was USD 3.57, whereas in the year-earlier period it was USD 3.27. The average expenses of the Russian Federation residents for purchase of OTC drugs in pharmacies also increased as compared to the previous year (USD 30.65 vs. USD 26.83).

RUSSIAN FEDERATION HOSPITAL MARKET: FIRST THREE MONTHS RESULTS 2020

According to the results of the Budget Audit of FPPs in the Russian Federation (without DLO and regional benefit)[™], based on the results for three months of 2019 the national hospital market reduced by 2% in physical terms and amounted to 93.004 mil. packs. In value terms, the market showed a 92% increase in terms of roubles and 89% in terms of dollars and reached RUB 50.666 bil. (USD 755.031 mil.) at wholesale prices. Based on the results for January-March 2020, the average price per FPP pack in the hospital sector of the country was USD 8.12, whereas in the year-earlier period its price was USD 4.21.

Figure 1. Russia pharmacy market for 3 months of 2019 – 3 months 2020



MSD became the leader among manufacturers in the hospital market of Russia in the first quarter of 2020, which increased the purchases by 3.6 times in the analysed period (Tab. 1). In addition to the leader, another six manufacturers showed a manifold growth and rose in the ranks. ROCHE (3.8-fold in growth of purchases) moved up to rank three from four, SANOFI (3-fold growth) moved up to rank four from seven, and the newcomers GLAXOSMITHKLINE (12.1-fold growth), BRISTOL MYERS (4.3-fold growth), PHARMASINTEZ (5-fold growth) and MARATHON PHARMA (1284-fold growth) broke into the ranks, coming in at numbers five through seven and ten respectively. Manufacturers BIOCAD (+77%), ABBVIE (+87%) and NOVARTIS (+67%) showed high, but below market level growth rates and moved down to the lower ranks two, eight and nine, respectively. The total share of the top ten manufacturers increased by over 19 p.p. and accounted for 48.4%.

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	7.1	3.7
2	1	BIOCAD RF	7.1	7.7
3	4	ROCHE	6.8	3.4
4	7	SANOFI	5.1	3.2
5	35	GLAXOSMITHKLINE	4.8	0.8
6	12	BRISTOL MYERS SQU	4.4	2.0
7	17	PHARMASINTEZ	4.0	1.6
8	5	ABBVIE	3.2	3.3
9	3	NOVARTIS	3.0	3.5
10	50	MARATHON PHARMA	2.9	0.0
Total			48.4	29.2

*AIPM members are in bold

Most brands of the top 10 brands rating showed high sales growth rates and rose in the ranks (Tab. 2). At the same time, the rating was renewed by half - five new brands broke into the top ten brands rating. One of them, TIVICAY, moved up to rank one from 43, due to 155-fold increase in purchases. Another four newcomers ULTRIX (1000-fold growth in purchases), PENTAXIM (10-fold growth), ISENTRESS (33-fold growth) and KADCYLA (3.5-fold growth) moved up to ranks four and the last two ranks, respectively. KEYTRUDA (4.8-fold growth), OPDIVO (4-fold growth) and PERJETA (3.6-fold growth) also rose to the higher ranks two, three and seven. The AVEGRA brand market also developed at a fast pace; its purchases increased 2.5 times. However, it lost one rank, displaced by the more dynamic brands. And only the previous leader HERTICAD (+59%) lagged the market growth rates, which led to a loss of seven ranks - the brand moved only to rank eight. The total share of the top 10 brands in the hospital market expanded by 16.2 p.p. to 26.2%.

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	43	TIVICAY	4.2	0.1
2	6	KEYTRUDA	3.4	1.4
3	4	OPDIVO	3.3	1.6
4	49	ULTRIX	2.9	0.0
5	3	AVEGRA BIOCAD	2.6	2.0
6	22	PENTAXIM	2.5	0.5
7	8	PERJETA	2.1	1.1
8	1	HERTICAD	2.1	2.5
9	41	ISENTRESS	1.6	0.1

Rank in the top ten		Brand	Share in total hospital purchases, %	
3 mon. 2020	3 mon. 2019		3 mon. 2020	3 mon. 2019
10	14	KADCYLA	1.5	0.8
Total			26.2	10.0

Following the respective brand, DOLUTEGRAVIR became the leader of the top ten INNs and generic name ranking, its purchases increased 155 times (Table 3). PEMBROLIZUMAB (4.8-fold growth) moved up to rank two from six, NIVOLUMAB (4-fold growth) moved up to rank three from four. One of the newcomers VACCINE, INFLUENZA (708-fold growth) broke into the top ten rating, moving up to rank four in the top ten rating. Another three newcomers, VACCINE, ACEL.PERT.DIP.TET. POLIO & HIB (10-fold growth), PERTUZUMAB (3.6-fold growth) and LOPINAVIR*RITONAVIR (307-fold growth) moved up to ranks seven through nine, respectively. At the same time, BEVACIZUMAB moved two ranks down, despite 2.5-fold growth in purchases. Due to lagging behind the growth rates, another two INNs TRASTUZUMAB (+80%) and SODIUM (+16%) moved down to the lower ranks. The total share accumulated by the top-ten INNs and grouping names increased from 12.4% to 27.6%.

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	46	DOLUTEGRAVIR	4.2	0.1
2	6	PEMBROLIZUMAB	3.4	1.4
3	4	NIVOLUMAB	3.3	1.6
4	50	VACCINE, INFLUENZA	3.0	0.0
5	3	BEVACIZUMAB	2.7	2.1
6	2	TRASTUZUMAB	2.7	2.9
7	35	VACCINE, ACEL.PERT.DIP.TET. POLIO & HIB	2.5	0.5
8	13	PERTUZUMAB	2.1	1.1
9	49	LOPINAVIR*RITONAVIR	2.0	0.0
10	1	SODIUM	1.7	2.9
Total			27.6	12.4

In contrast to the above rankings, the leader of the top ten ATC groups did not change - L01 Antineoplastic drugs maintained and strengthened its leading position in the top 10 ATC groups rating due to 2.5-fold growth in sales (Table 4). J05 Antivirals for systemic use (8.3-fold growth in purchases) and J07 Vaccines (3.7-fold growth) moved up to ranks two and three from six and five. Due to a 2.5-fold increase in purchases, the L02 Endocrine therapy group moved from rank 12 to seven, becoming the only newcomer of the rating. V08 Contrast media (+47%) moved up one rank, to number eight. At the same time, four groups moved two ranks down: J01 Antibacterials for systemic use (+18%), B05 Plasma and perfusion solutions (+14%), B01 Anticoagulants (+11%), L04 Immunosuppressants (+28%) and J06 Immune sera and immunoglobulins (+17%). In total, the top ten ATC groups accumulated 81.9% of the hospital market, whereas in the year-earlier period - 68.7%.

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	37.0	28.5
2	6	J05	ANTIVIRALS FOR SYSTEMIC USE	14.3	3.3
3	5	J07	VACCINES	9.2	4.8
4	2	J01	ANTIBACTERIALS FOR SYST USE	5.2	8.4
5	3	B05	PLASMA SUBSTITUTES AND PERFUSION SOLUTIONS	4.1	6.9
6	4	B01	ANTITHROMBOTIC AGENTS	3.2	5.6
7	12	L02	ENDOCRINE THERAPY	2.6	2.0
8	9	V08	CONTRAST MEDIA	2.2	2.9
9	7	L04	IMMUNOSUPPRESSANTS	2.2	3.2
10	8	J06	IMMUNE SERA & IMMUNOGLOBULIN	1.9	3.1
Total				81.9	68.7

Conclusion. At the end of January-March of 2020, the Russian hospital market showed high positive growth rates both in rouble terms (+92%) and in dollar terms (+89%) and brought in RUB 50.666 bil. (USD 755.031 bil.). In pack terms, the market reduced by 2% and amounted to 93.004 mil. packs compared to the same period of the last year. At the end of the first quarter 2020, the average cost of a finished pharma product (FPP) pack in the national hospital sector amounted to USD 8.12 vs. USD 4.21 in 2019.

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

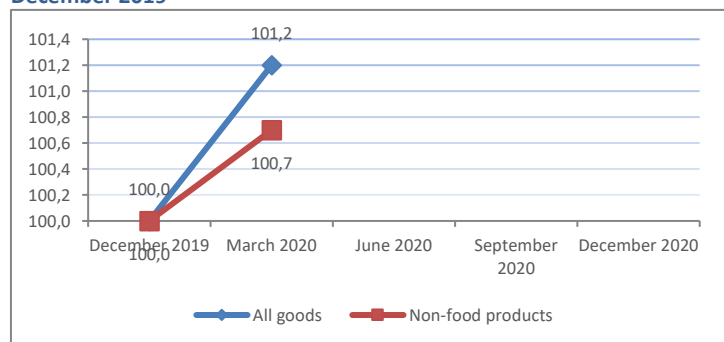
Macroeconomic indices

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

Value	March-January 2020	March-January 2020 (%) vs March-January 2019
Industrial production index		107.0
Retail turnover, RUB bil.	2,875.5	105.2
Monthly average accrued wage per worker (nominal), RUB	61,991	110.3
real		107.9

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 mark-ups

Figure 1. Movement of weighted average prices and retail mark-ups in Q 1, 2019 - Q 1, 2020

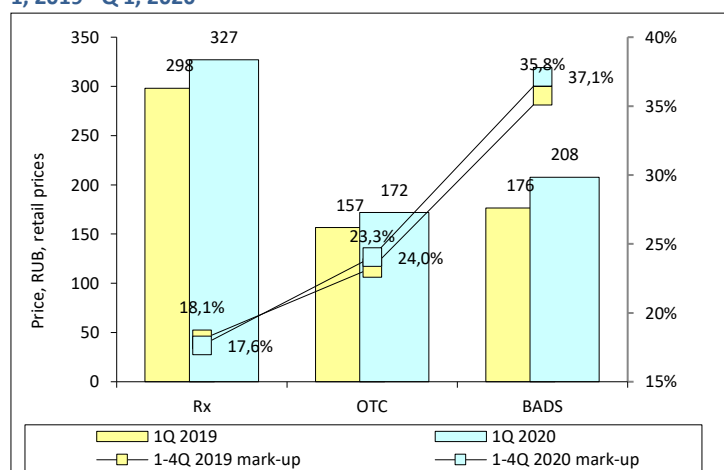
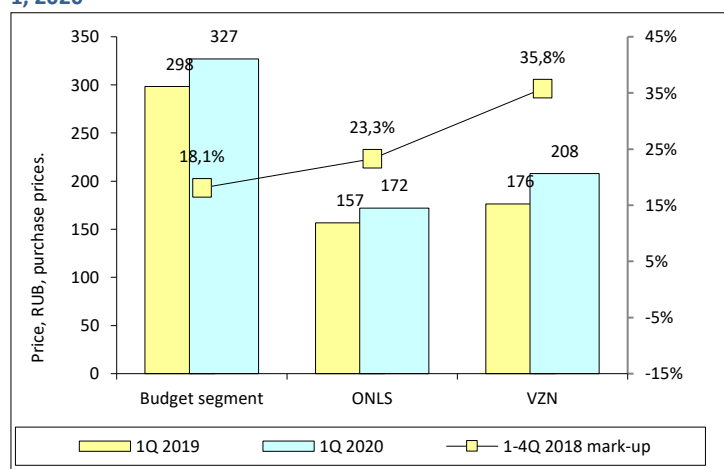


Figure 2. Movement of weighted average purchase prices in 1Q, 2019 - Q 1, 2020



Indicators of the dynamics and structure of the market³

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

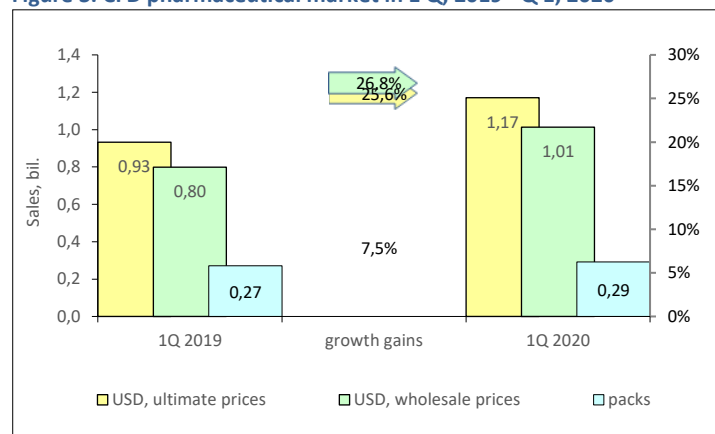


Figure 4. Structure of CFD pharmaceutical market by major segments in 1 Q, 2019 - 1 Q, 2020

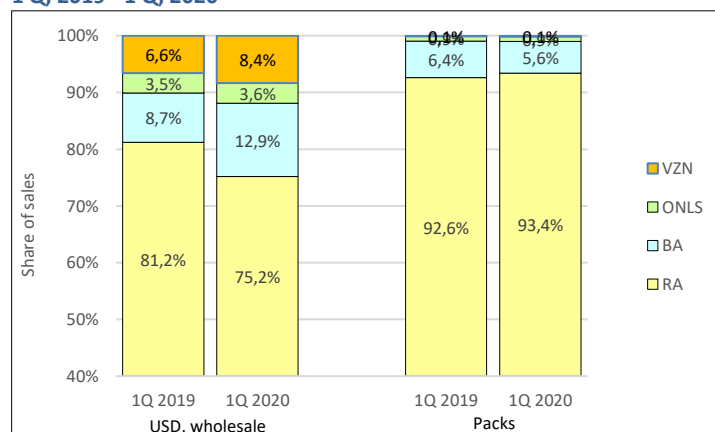


Figure 5. Structure of the retail segment of CFD market in 1 Q, 2019 - 1 Q, 2020

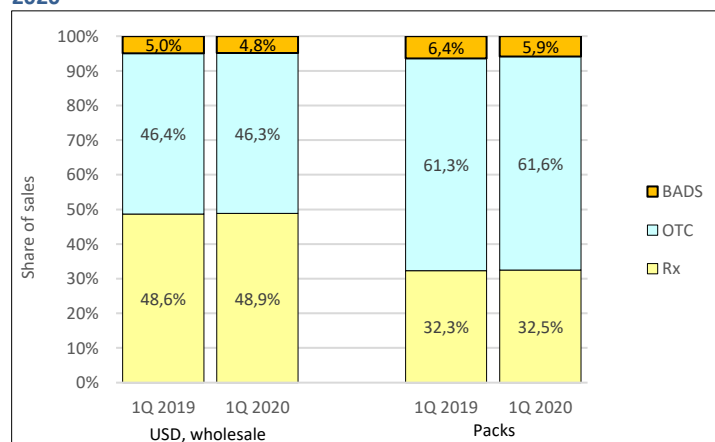
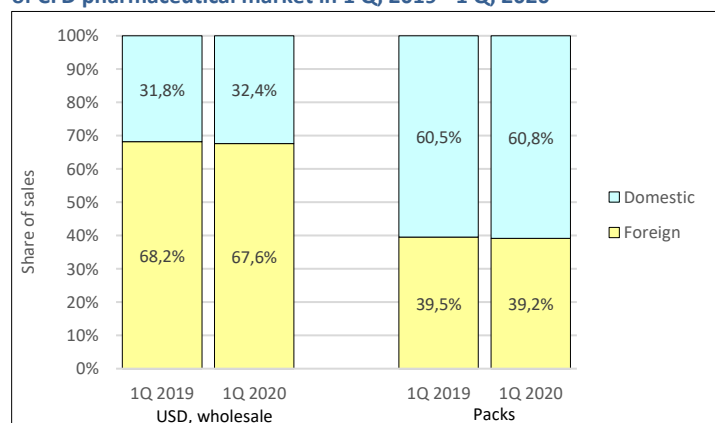


Figure 6. Movement of the Russian/foreign drugs share in the structure of CFD pharmaceutical market in 1 Q, 2019 - 1 Q, 2020



³ Exclusive of Moscow

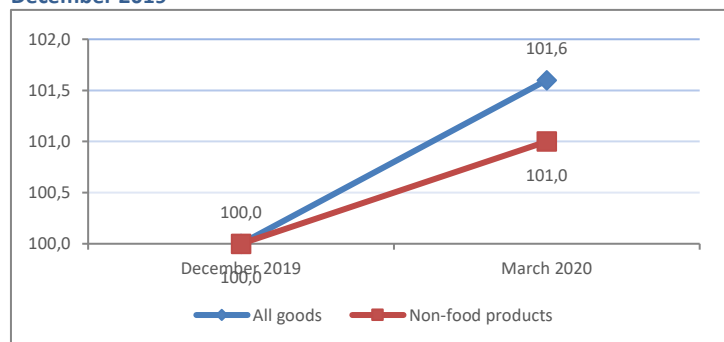
Macroeconomic indices

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

Value	March-January 2020	March-January 2020 (%) vs March-January 2019
Industrial production index		102.4
Retail turnover, RUB bil.	829.3	106.4
Monthly average accrued wage per worker (nominal), RUB	54,687	107.3
real		104.5

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 mark-ups

Figure 1. Movement of weighted average prices and retail mark-ups in Q 1, 2019 - 1 Q, 2020

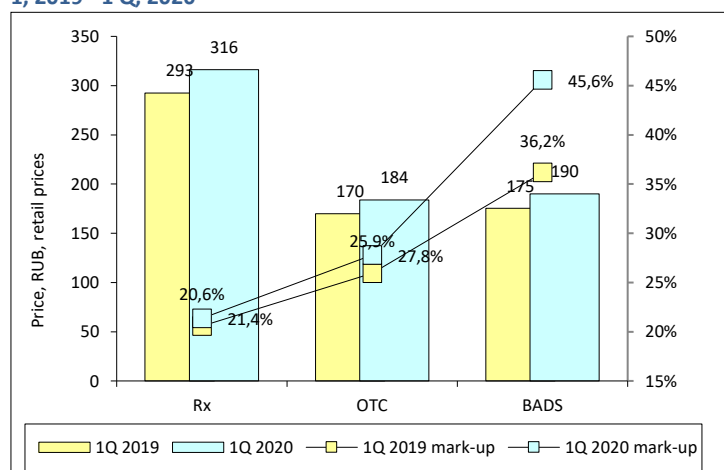
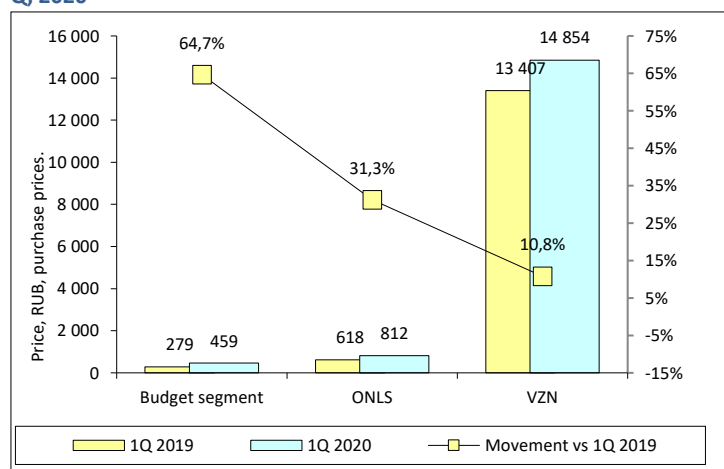


Figure 2. Movement of weighted average purchase prices in 1Q, 2019 - 1 Q, 2020



Indicators of the dynamics and structure of the market⁴

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

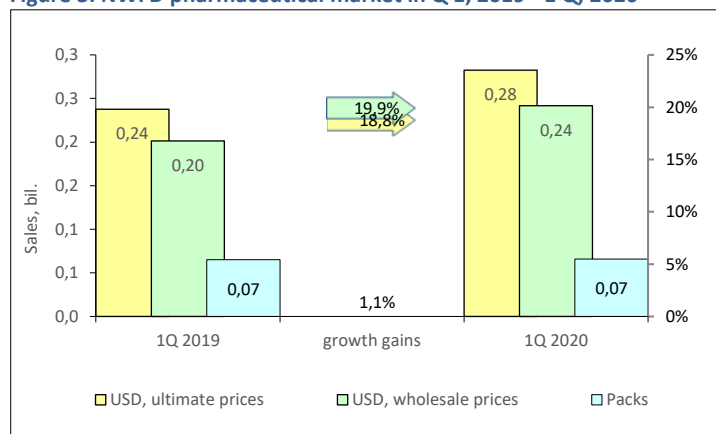


Figure 4. Structure of NWFD pharmaceutical market by major segments in 1 Q, 2019 - 1 Q, 2020

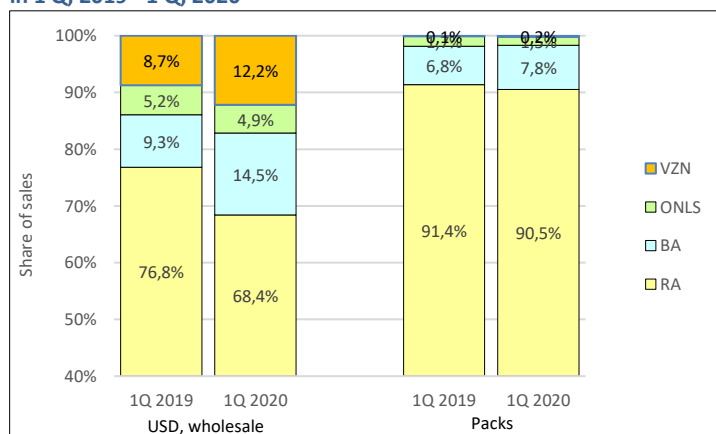


Figure 5. Structure of the retail segment of NWFD pharmaceutical market in 1 Q, 2019 - 1 Q, 2020

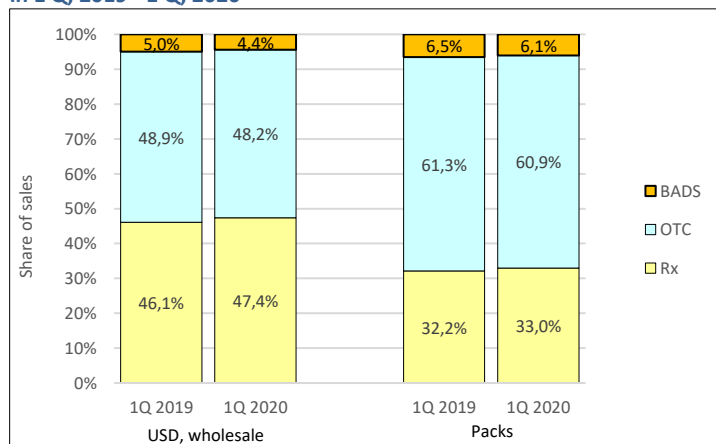
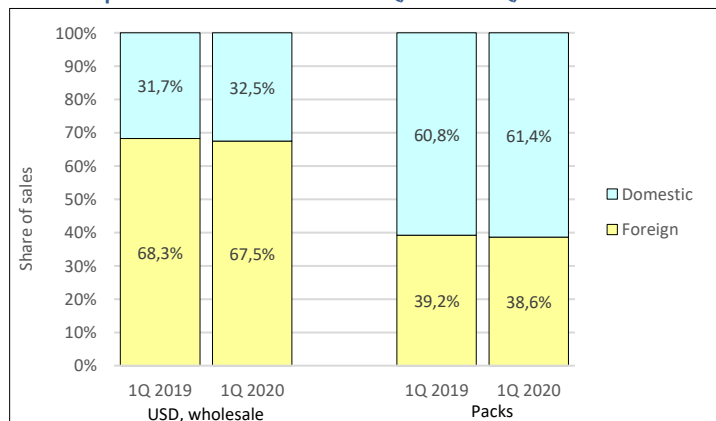


Figure 6. Movement of the Russian/ foreign drugs share in the structure of NWFD pharmaceutical market in 1 Q, 2019 - 1 Q, 2020



⁴ Exclusive of St. Petersburg

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

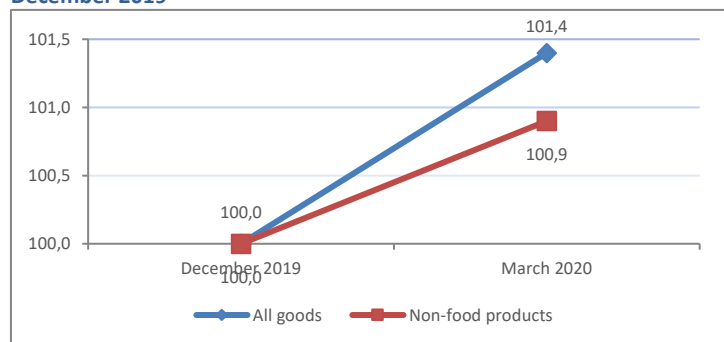
Macroeconomic indices

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

Value	March-January 2020	March-January 2020 (%) vs March-January 2019
Industrial production index		101.7
Retail turnover, RUB bil.	1,426.3	104.6
Monthly average accrued wage per worker (nominal), RUB	34,665	107.9
real		105.5

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 mark-ups

Figure 1. Movement of weighted average prices and retail mark-ups in Q 1, 2019 - 1 Q, 2020

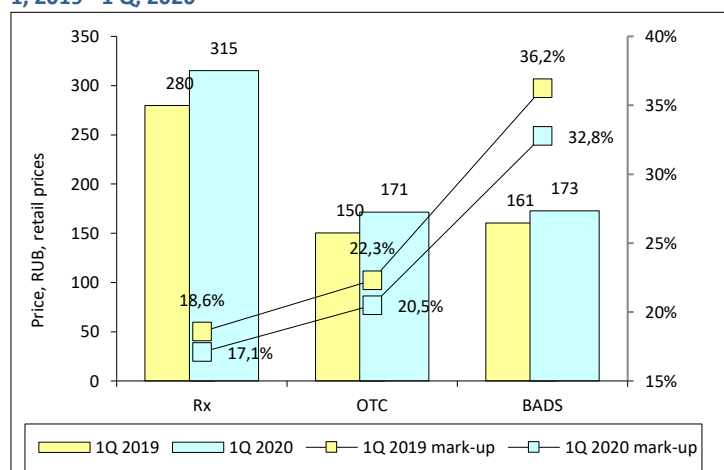
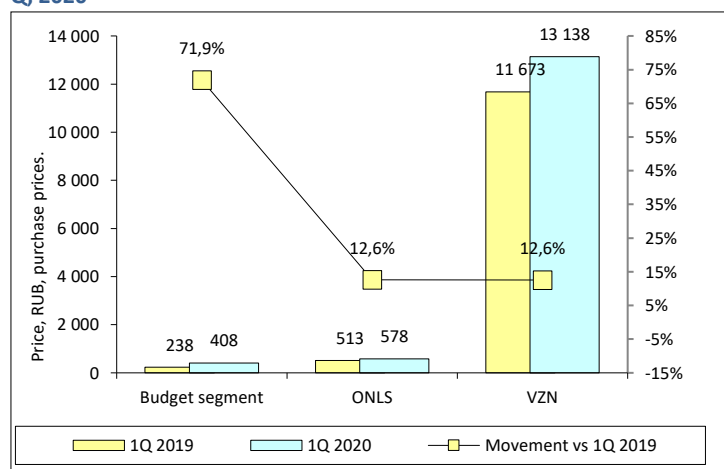


Figure 2. Movement of weighted average purchase prices in 1Q, 2019 - 1 Q, 2020



Indicators of the movement and structure of the market

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

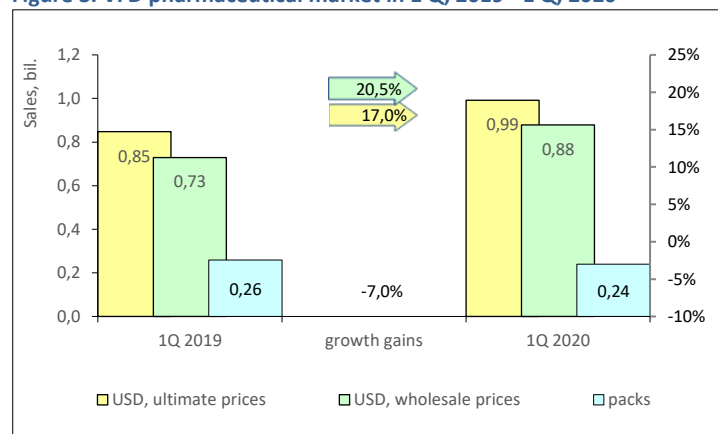


Figure 4. Structure of VFD pharmaceutical market by major segments in 1 Q 2019 - 1 Q, 2020

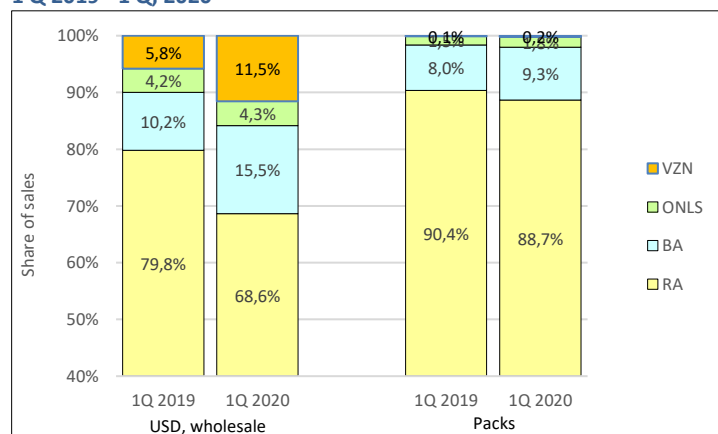


Figure 5. Structure of the retail segment of VFD pharmaceutical market in 1 Q, 2019 - 1 Q, 2020

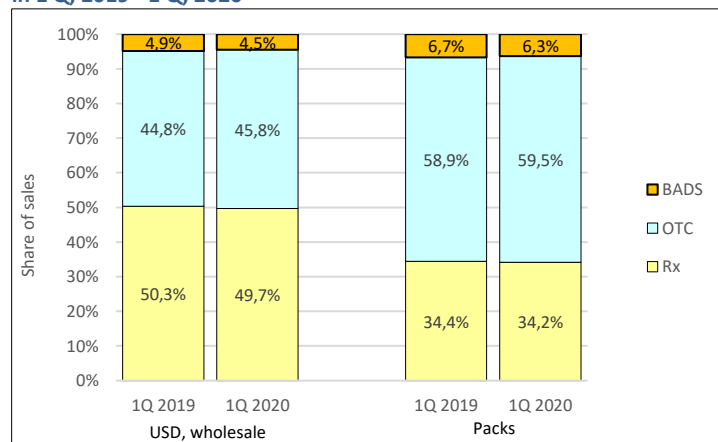
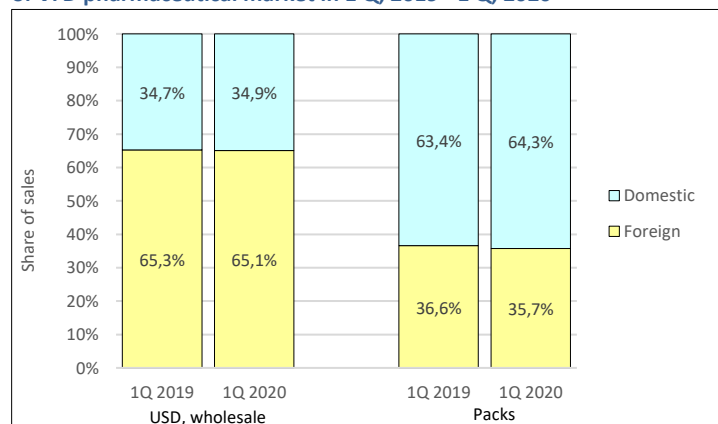


Figure 6. Movement of the Russian/ foreign drugs share in the structure of VFD pharmaceutical market in 1 Q, 2019 - 1 Q, 2020



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

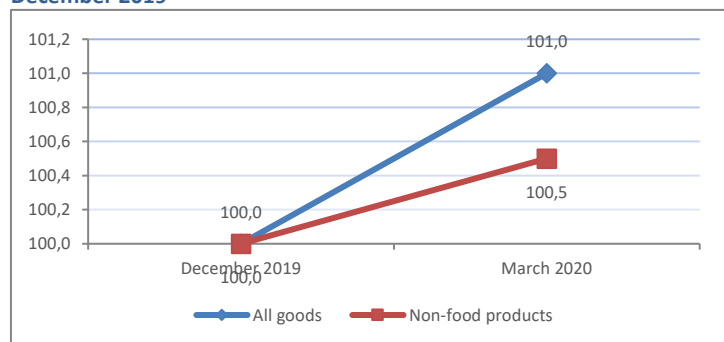
Macroeconomic indices

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

Value	March-January 2020	March-January 2020 (%) vs March-January 2019
Industrial production index		103.4
Retail turnover, RUB bil.	710.5	104.0
Monthly average accrued wage per worker (nominal), RUB	51,241	107.7
real		105.2

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 mark-ups

Figure 1. Movement of weighted average prices and retail mark-ups in Q 1, 2019 - 1 Q, 2020

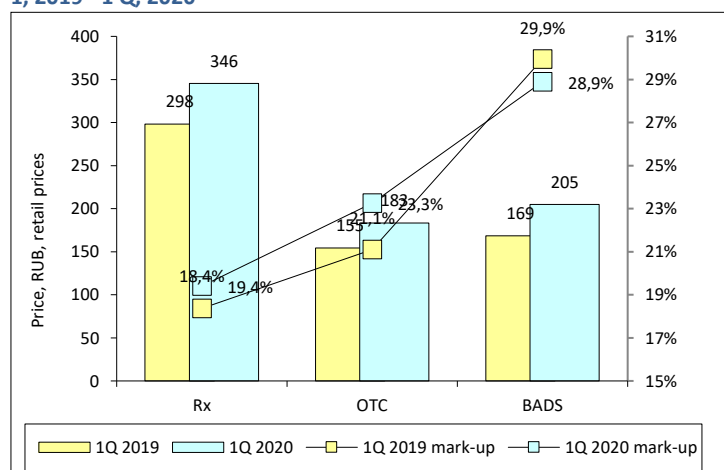
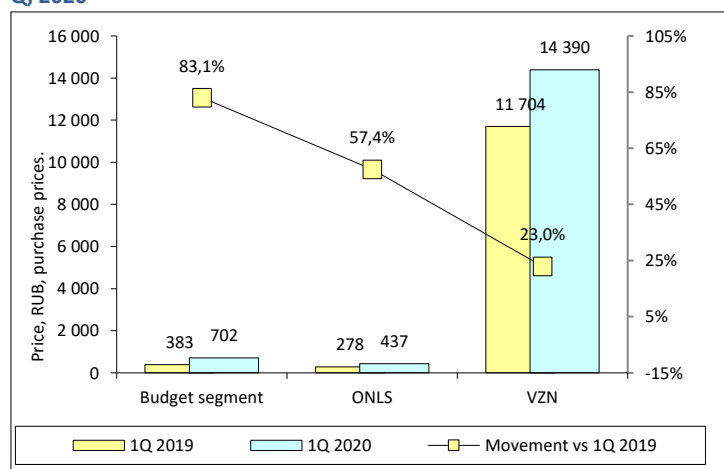


Figure 2. Movement of weighted average purchase prices in 1Q, 2019 - 1 Q, 2020



Indicators of the movement and structure of the market

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

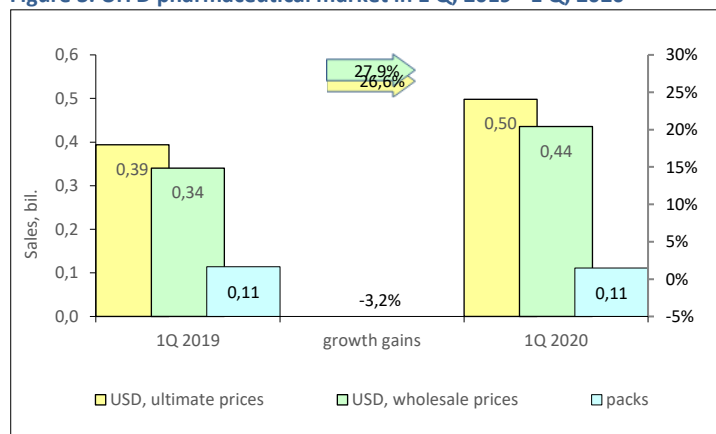


Figure 4. Structure of UFD pharmaceutical market by major segments in 1 Q, 2019 - 1 Q, 2020

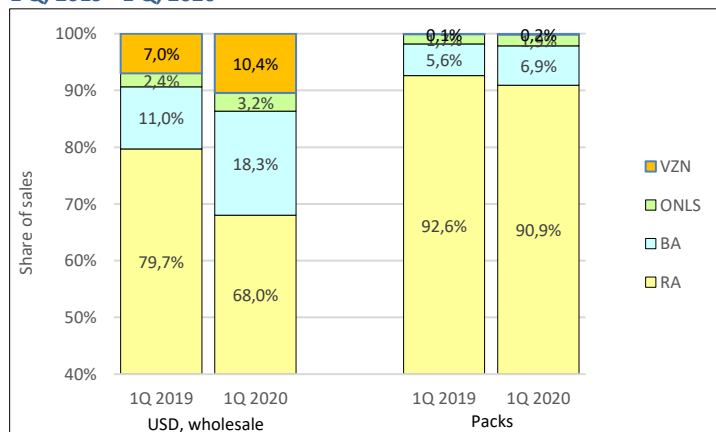


Figure 5. Structure of the retail segment of UrFD pharmaceutical market in 1 Q, 2019 - 1 Q, 2020

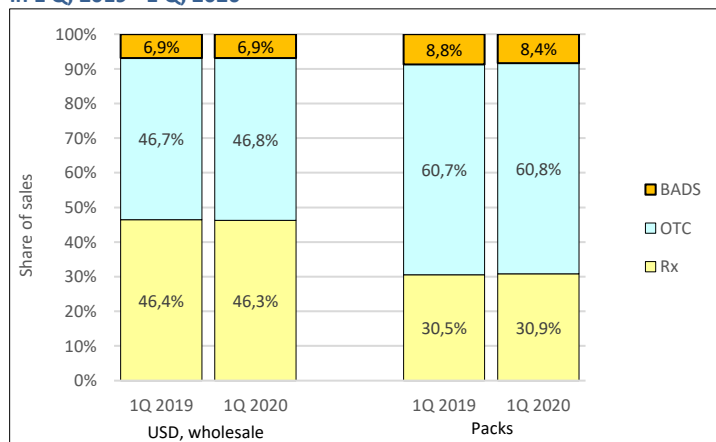
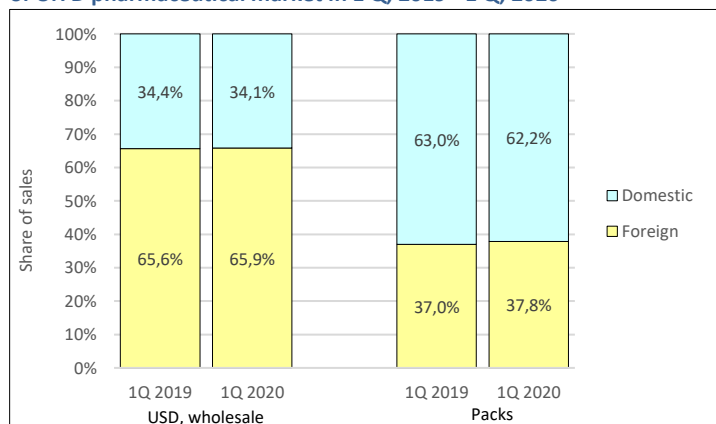


Figure 6. Movement of the Russian/ foreign drugs share in the structure of UrFD pharmaceutical market in 1 Q, 2019 - 1 Q, 2020



PHARMACEUTICAL MARKET OF THE SIBERIAN FEDERAL DISTRICT (SiFD) IN 1Q 2020 KEY PERFORMANCE INDICATORS

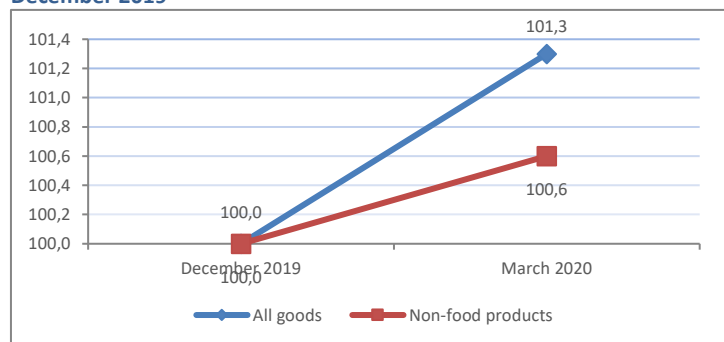
Macroeconomic indices

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

Value	March-January 2020	March-January 2020 (%) vs March-January 2019
Industrial production index		99.4
Retail turnover, RUB bil.	711.6	103.2
Monthly average accrued wage per worker (nominal), RUB	41,060	106.6
real		103.7

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 mark-ups

Figure 1. Movement of weighted average prices and retail mark-ups in Q 1, 2019 - 1 Q, 2020

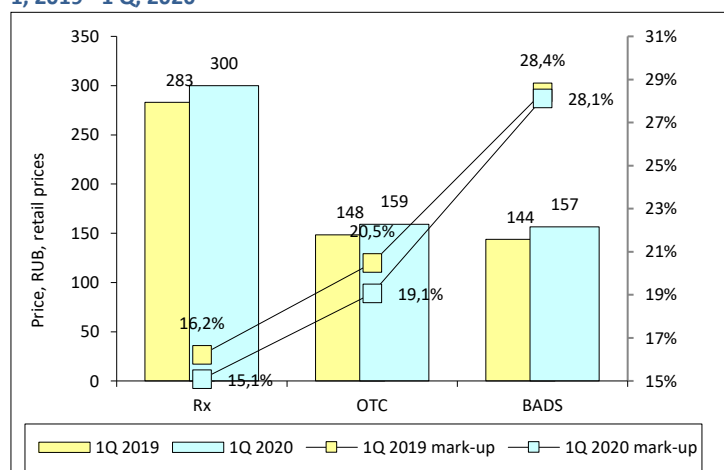
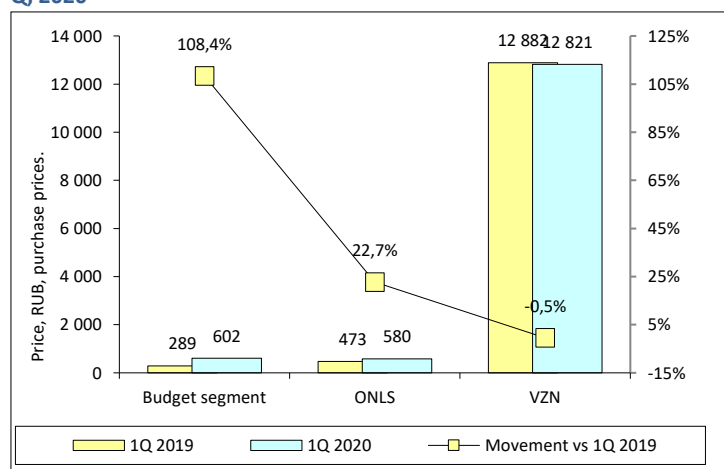


Figure 2. Movement of weighted average purchase prices in Q1, 2019 - 1 Q, 2020



Indicators of the movement and structure of the market

Figure 3. SiFD pharmaceutical market in 1 Q, 2019 - 1 Q, 2020

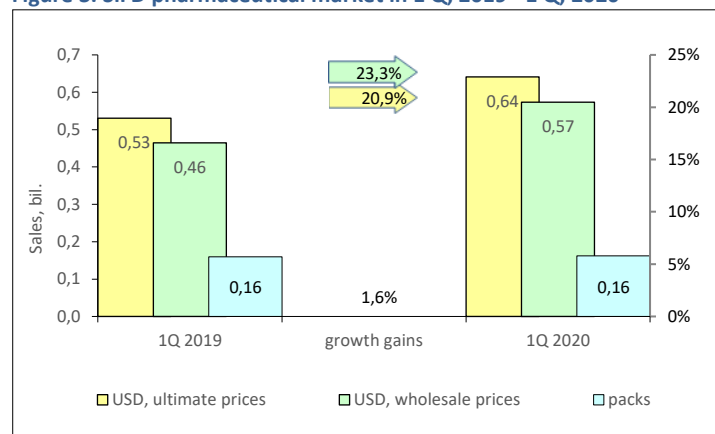


Figure 4. Structure of SiFD pharmaceutical market by major segments in 1 Q, 2019 - 1 Q, 2020

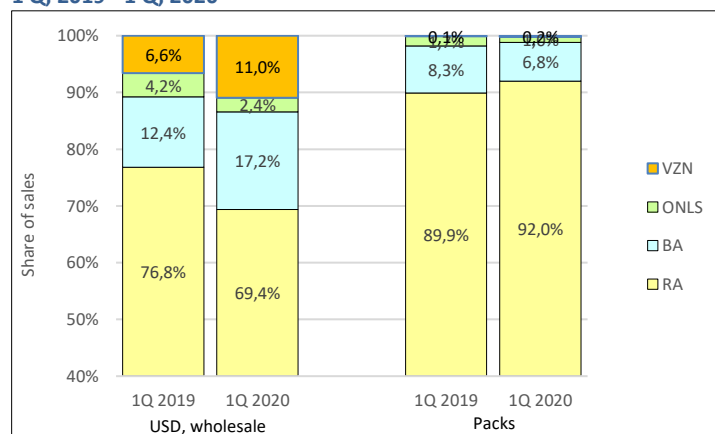


Figure 5. Structure of the retail segment of SiFD pharmaceutical market in 1 Q, 2019 - 1 Q, 2020

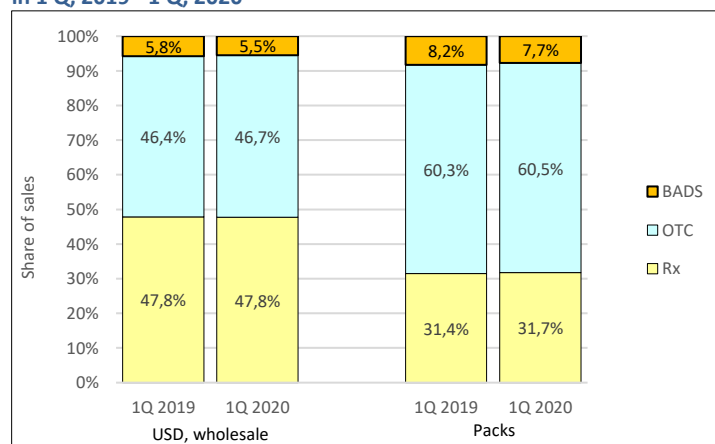
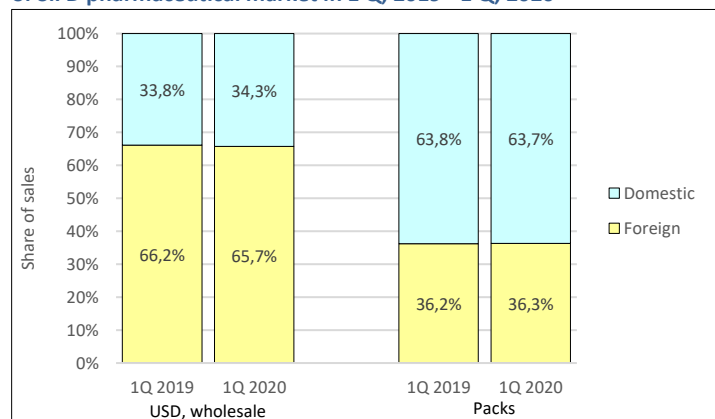


Figure 6. Movement of the Russian/ foreign drugs share in the structure of SiFD pharmaceutical market in 1 Q, 2019 - 1 Q, 2020



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

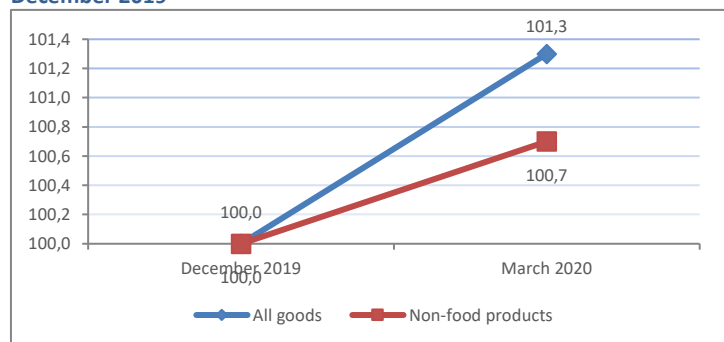
Macroeconomic indices

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

Value	March-January 2020	March-January 2020 (%) vs March-January 2019
Industrial production index		102.2
Retail turnover, RUB bil.	821.1	104.6
Monthly average accrued wage per worker (nominal), RUB	34,517	108.3
real		106.2

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 mark-ups

Figure 1. Movement of weighted average prices and retail mark-ups in Q 1, 2019 - 1 Q, 2020

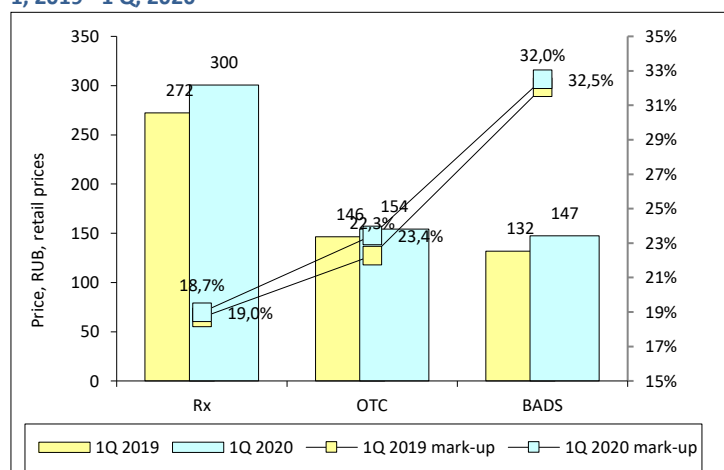
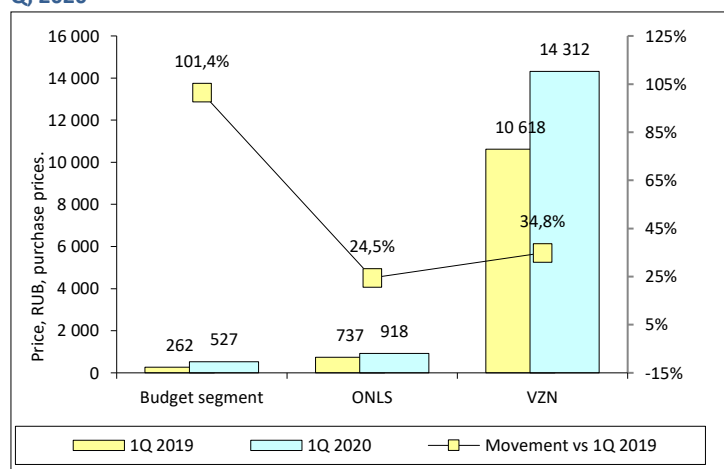


Figure 2. Movement of weighted average purchase prices in 1Q, 2019 - 1 Q, 2020



Indicators of the movement and structure of the market

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

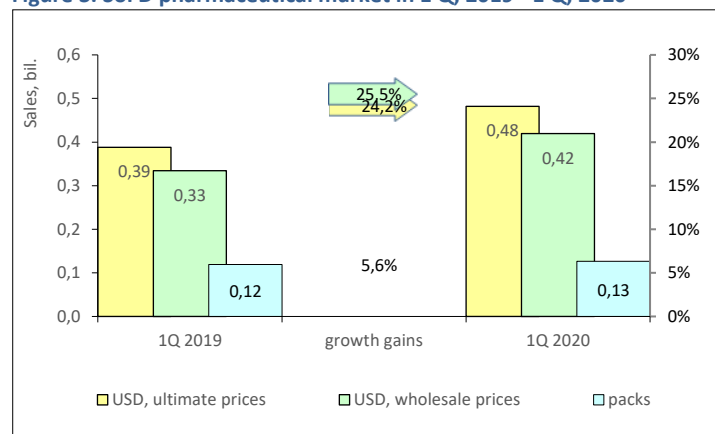


Figure 4. Structure of SoFD pharmaceutical market by major segments in Q 1, 2019 - 1 Q, 2020

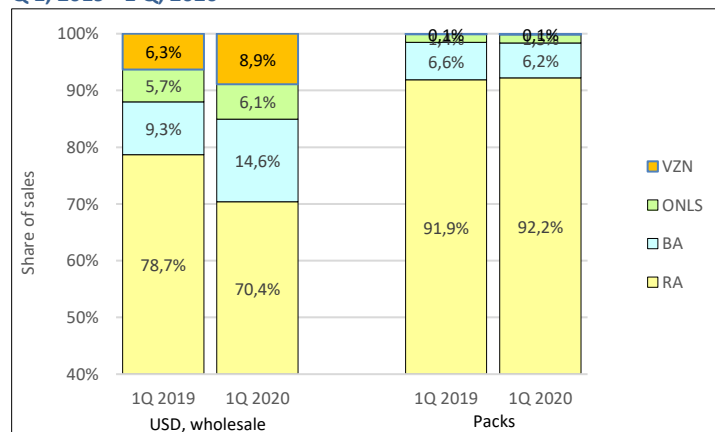


Figure 5. Structure of the retail segment of SoFD pharmaceutical market in 1 Q, 2019 - 1 Q, 2020

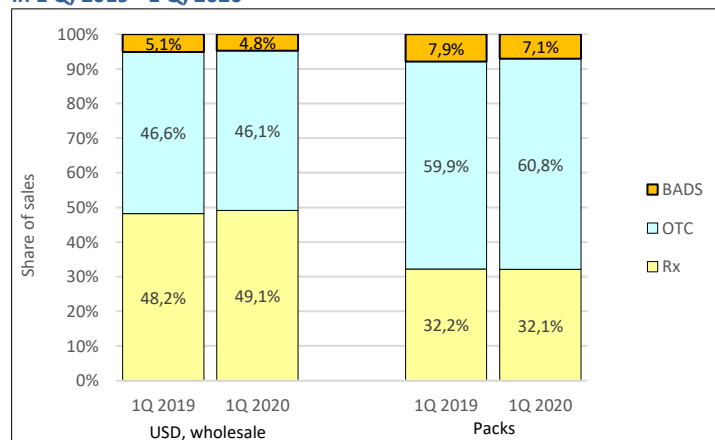
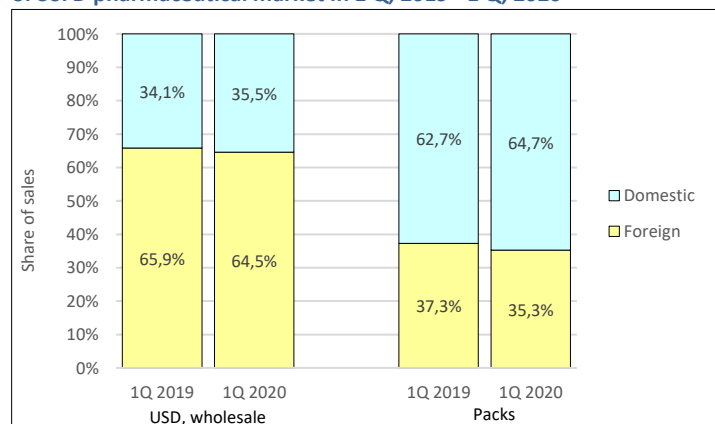


Figure 6. Movement of the Russian/ foreign drugs share in the structure of SoFD pharmaceutical market in 1 Q, 2019 - 1 Q, 2020



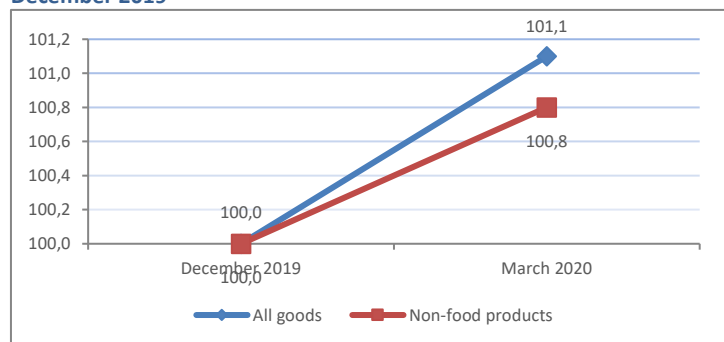
Macroeconomic indices

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

Value	March-January 2020	March-January 2020 (%) vs March-January 2019
Industrial production index		103.6
Retail turnover, RUB bil.	441.7	102.1
Monthly average accrued wage per worker (nominal), RUB	56,250	108.2
real		104.7

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 mark-ups

Figure 1. Movement of weighted average prices and retail mark-ups in Q 1, 2019 - 1 Q, 2020

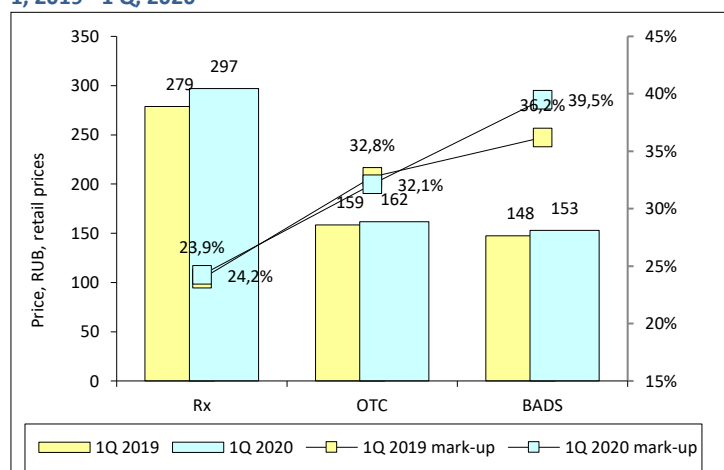
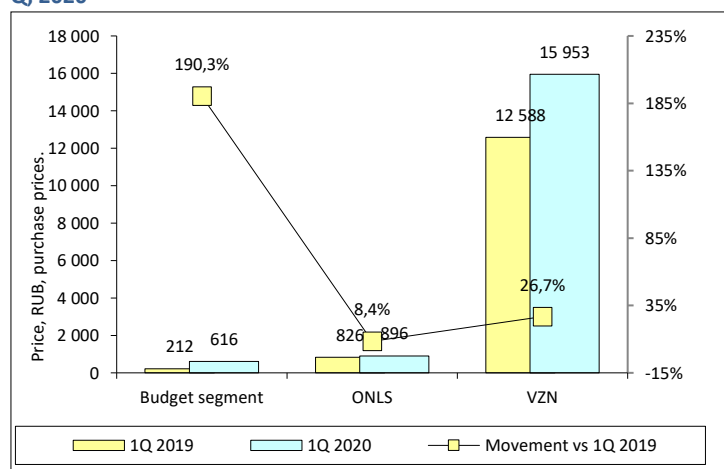


Figure 2. Movement of weighted average purchase prices in 1Q, 2019 - 1 Q, 2020



Indicators of the movement and structure of the market

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

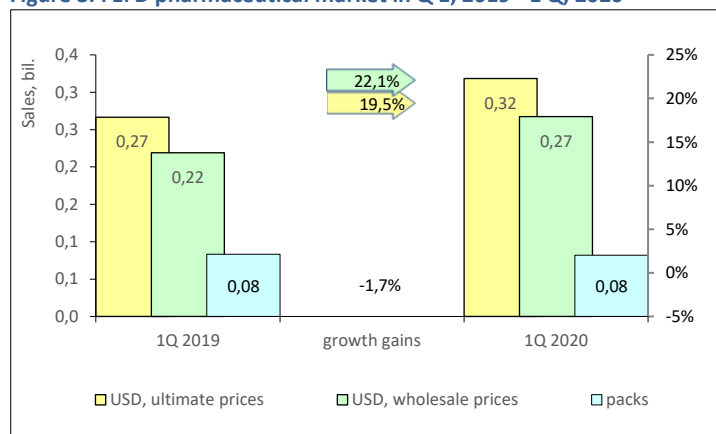


Figure 4. Structure of FEFD pharmaceutical market by major segments in 1 Q, 2019 - 1 Q, 2020

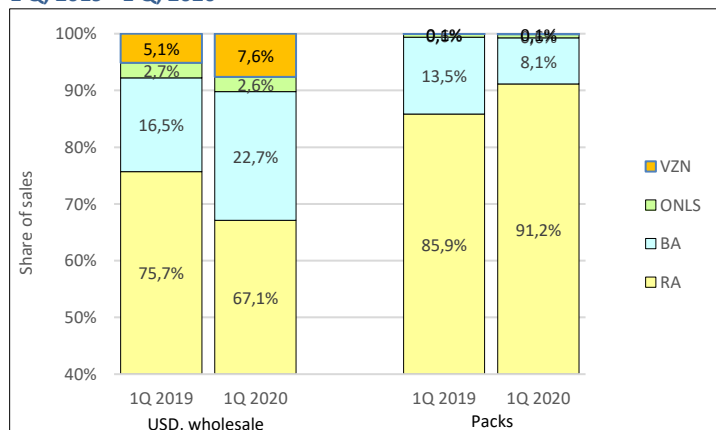


Figure 5. Structure of the retail segment of FEFD pharmaceutical market in 1 Q, 2019 - 1 Q, 2020

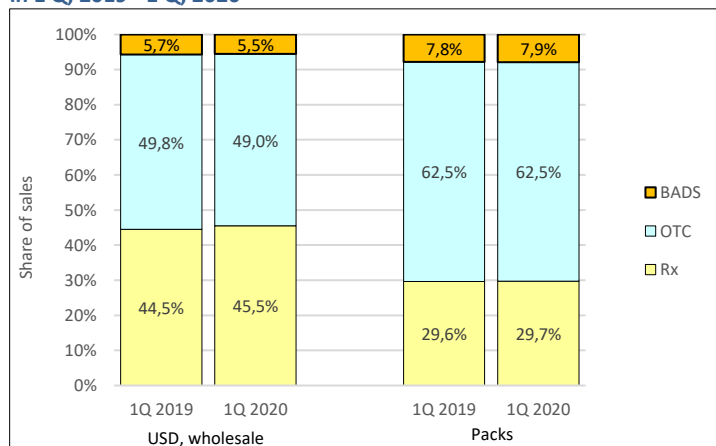


Figure 6. Movement of the Russian/ foreign drugs share in the structure of FEFD pharmaceutical market in 1 Q, 2019 - 1 Q, 2020

