

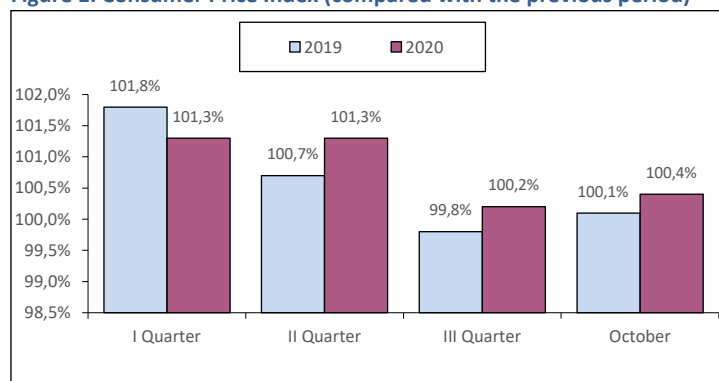
MACROECONOMIC INDICES

Inflation

According to Federal State Statistics Service's data, the Consumer Price Index was estimated as 100.4% in October 2020 compared to the previous month and 103.3% compared to December of the previous year.

In October 2020, Industrial Producer Price Index (for goods intended for sale on the domestic market) was 100.3%, whereas in the month-earlier period it had amounted to 100.7%. The index accounted for 101.1% against December of 2019.

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



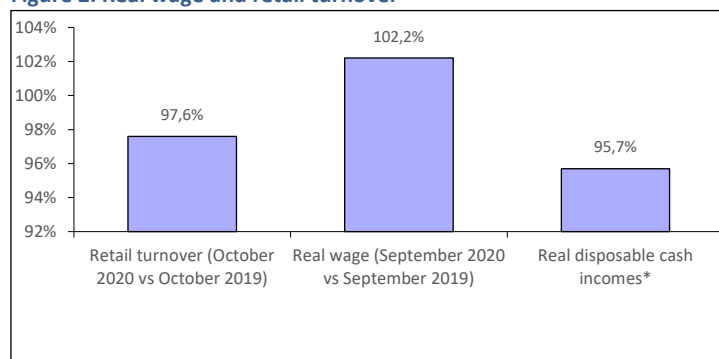
Living standard

In September 2020, a gross monthly average wage of corporate employees reached RUB 49259 (USD 651.14). It accounted for 106.0% compared to September 2019, and 103.3% compared to the previous period. In September 2020, the real gross wage accounted for 102.2% as compared to September 2019, and 103.4% against the prior period. According to estimates¹, real disposable cash incomes decreased by 4.3% in January-September 2020 compared to January-September 2019 (Fig. 2).

Retail turnover

In October 2020, the retail turnover was equal to RUB 2976.5 bil or 97.6% (in comparable prices) against the level of the same period of the previous year, and RUB 26902.0 bil. or 95.4% in January - October 2020 (Fig. 2).

Figure 2. Real wage and retail turnover



* January-September 2020 vs. January-September 2019.

Industrial Production

According to Federal State Statistics Service's data, Industrial Production Index accounted for 94.1% in October 2020 compared to the same period in the previous year, and 96.9% in January - October 2020

According to Federal State Statistics Service's data, Industrial Production Index of drugs and medical products in October 2020 accounted for 99.4% compared to the same period of 2019, – 91.5% compared to September 2020. In January-October vs. January-October 2019 – 121.1%.

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 October 2020.

Table 1. The top ten Russian chemical and pharmaceutical manufacturers by sales, October 2020

Rank	Manufacturer	RUB mil.
1	Otcpharm	4159.6
2	Valenta	2732.1
3	Biocad	2592.9
4	Stada	2529.3
5	Microgen	2359.7
6	Pharmstandart	1646.3
7	Marathon Pharma	1471.3
8	Atoll	1372.1
9	Grotex	1316.2
10	Sotex	1225.5

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 almost all regions in September 2020 compared to the previous month. The most pronounced growth in sales was observed in St. Petersburg (+45%), the least one in Tatarstan (+6%). A decrease in sales was observed in Krasnodar Krai (-9%).

Table 2. Pharmacy sales in the regions, 2020

Region	Pharmacy sales, \$ mil. (wholesale prices)			Growth gain, % (roubles)		
	July 20	August 2020	September 2020	July/June 20	August /July 20	September/ August 20
Moscow	125.6	130.9	177.3	-1%	8%	39%
St. Petersburg	57.1	60.7	85.8	-2%	10%	45%
Krasnodar Krai	37.0	49.5	43.8	22%	39%	-9%
Krasnoyarsk Krai	22.4	20.3	24.6	10%	-6%	24%
Tatarstan	22.8	24.4	25.2	15%	11%	6%
Rostov Region	21.9	24.7	27.8	11%	17%	15%
Novosibirsk Region	19.9	20.3	24.5	14%	6%	24%
Voronezh Region	13.2	13.6	14.5	-7%	6%	10%
Perm	5.8	7.1	8.1	-17%	25%	17%
Tyumen	7.1	7.7	8.6	28%	12%	14%

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 October 2020

Rank	Company*	Quantity of broad-casts
1	Otcpharm	14,121
2	Reckitt Benckiser	8,707
3	Johnson & Johnson	8,116
4	Sandoz	7,731
5	Berlin-Chemie Menarini Group	7,727

Source - Remedium according to Mediascope's data

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

Rank	Brand*	Quantity of broad-casts
1	Strepsils	3,968
2	Nurofen	3,824
3	ACC	2,584
4	Amixin	2,409
5	Rengalin	2,263

Source - Remedium according to Mediascope's data

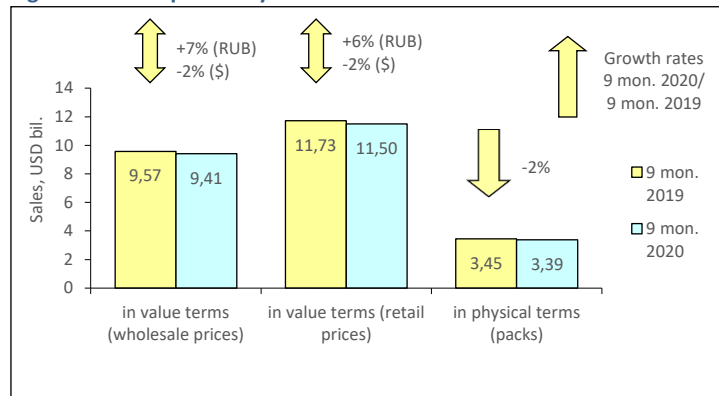
* Only products registered with State Register of Medicines were considered

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 NINE MONTHS RESULTS

According to the results of the Retail Audit of FPP (Finished Pharmaceutical Products) in Russian Federation™, at the end of the first nine months of 2020 the sales of drugs in natural terms in the country continued to decline, reducing by 2% to 3.390 bil. packs compared to the same period of 2019. In money terms, the market saw a 7% increase in terms of roubles and 2% decrease in terms of dollars. The volume of the market amounted to RUB 664.053 bil (USD 9.408 bil.) at wholesale prices (Fig. 1). The average cost of a pack in retail prices turned out to be almost equal to the last year's indicator: USD 3.39 vs. USD 3.40 in 2019. At the end of January-September in 2020, the residents' spending for drugs in Russia averaged to USD 78.35, whereas during the same period a year ago it averaged to USD 79.91.

Figure 1. Russia pharmacy market for 9 months of 2019 – 9 months 2020



According to the results for the first nine months of 2020, BAYER (+4%)² and SANOFI (+5%) hold the leading positions in terms of sales among manufacturers on the Russian pharmacy market, although the market shares of both slightly decreased due to the lagging growth rates (Table 1). The most dynamic among the leaders Russian OTC PHARM (+31%) moved up to rank three from six, displacing STADA (-2%) down one rank. SANDOZ (+19%), ABBOTT and BERLIN-CHEMIE / MENARINI (+8% for both) also showed outperformance growth rates. At the same time, the former move to rank six, while the other two retained their ranks nine and ten. SERVIER (+3%) also held its previous rank five. Two manufacturers, TEVA (+1%) and KRKA (+5%), fell in the ranks, moving down to ranks seven and eight, respectively. In total, the top ten manufacturers accumulated 34.8% of the Russian market, which is slightly higher than in the year-earlier period (34.6%).

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten	9 mon. 2020	9 mon. 2019	Manufacturer*	Share in total pharmacy sales, %	
				9 mon. 2020	9 mon. 2019
1	1	1	BAYER	4.7	4.8
2	2	2	SANOFI	4.1	4.2
3	6	3	OTC PHARM	3.8	3.1
4	3	4	STADA	3.6	3.9
5	5	5	SERVIER	3.4	3.5
6	8	6	SANDOZ	3.3	3.0
7	4	7	TEVA	3.3	3.5
8	7	8	KRKA	3.0	3.0
9	9	9	ABBOTT	2.8	2.8
10	10	10	BERLIN-CHEMIE/MENARINI	2.8	2.8
Total				34.8	34.6

*AIPM members are in bold

XARELTO (+10%) remains the best-selling brand on the Russian market (Table 2). Due to high growth rates, antivirals INGAVIRIN (+80%) and ARBIDOL (3.6-fold growth in sales) broke into the top 10 ranking for the first time, moving up to ranks two and three. One more newcomer ELIQUIS (+34%) moved up to rank nine. MIRAMISTIN (+23%) also managed to improve its position by three points, moved up to rank seven from ten. At the same time, DETRALEX (+3%), NUROFEN and CONCOR (+2% each), as well as PENTALGIN (+15%) lost one rating point each, while MEXIDOL (+4%) moved three ranks down. The total share of the top 10 increased from 6% to 7.1%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten	9 mon. 2020	9 mon. 2019	Brand	Share in total pharmacy sales, %	
				9 mon. 2020	9 mon. 2019
1	1	1	XARELTO	1.1	1.1
2	11	11	INGAVIRIN	0.8	0.5
3	48	48	ARBIDOL	0.8	0.2
4	2	2	DETRALEX	0.7	0.7
5	3	3	NUROFEN	0.7	0.7
6	4	4	CONCOR	0.6	0.7
7	10	10	MIRAMISTIN	0.6	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, %	
9 mon. 2020	9 mon. 2019		9 mon. 2020	9 mon. 2019
8	5	MEXIDOL	0.6	0.6
9	16	ELIQUIS	0.6	0.5
10	9	PENTALGIN	0.6	0.5
Total			7.1	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%) and DIOSMIN* HESPERIDIN (+5%), as well as BISOPROLOL (+4%), PAN-CREATIN (+5%) and NIMESULIDE (+12%) placed at ranks five through seven, respectively. The INNs RIVAROXABAN (+10%), as well as UMIFENOVIR (3.3-fold growth in sales), which entered the top ten for the first time, and IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID (+80%) managed to rise in the ranks. At the same time, despite the outperforming growth rates, they displaced DICLOFENAC INN (+12%) to the last position in the top 10 INNs rating. IBUPROFEN (+1%) also lost one ranking point. The total share of the top-ten INNs and grouping names increased from 9.2% to 10.1%.

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

Rank	9 mon. 2020	9 mon. 2019	INNs/Grouping Names	Share in total pharmacy sales, %	
				9 mon. 2020	9 mon. 2019
1	1	1	XYLOMETAZOLINE	1.4	1.5
2	2	2	DIOSMIN* HESPERIDIN	1.1	1.1
3	4	3	RIVAROXABAN	1.1	1.1
4	3	4	IBUPROFEN	1.0	1.1
5	5	5	BISOPROLOL	1.0	1.0
6	6	6	PANCREATIN	1.0	1.0
7	7	7	NIMESULIDE	1.0	0.9
8	48	48	UMIFENOVIR	0.9	0.3
9	30	30	IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID	0.8	0.5
10	9	9	DICLOFENAC	0.8	0.8
Total				10.1	9.2

C09 Drugs acting on the renin-angiotensin system (+13%) and M01 Anti-inflammatory and antirheumatic drugs (+6%) held the leading positions in the top 10 ATC groups ranking (Table 4). Some shifts took place in the lower part of the top ten ranking, due to which three ATC brands rose in the ranks. J05 Antivirals for systemic use (+53%) and J01 Antibacterials for systemic use (+14%) moved up to ranks three and five, and the newcomer R05 Cough and cold preparations (+5%), which broke into the top 10 ranking for the first time, moving up to rank ten. The remaining five groups, on the contrary, fell in the ranks. Thus, B1 Anticoagulants (+9%), N02 Analgesics (+11%) and C5 Vasoprotectives (+5%) moved down one rank. At the same time, G03 Sex hormones (-1%) and R01 Nasal preparations (-0.3%), which reduced their sales, lost two ranks each, moving down to ranks to seven and eight. In total, the top ten ATC groups accumulated 37.5%, whereas the year-earlier period they accounted for 36.1%.

Table 4. The top ten ATC Groups by pharmacy sales

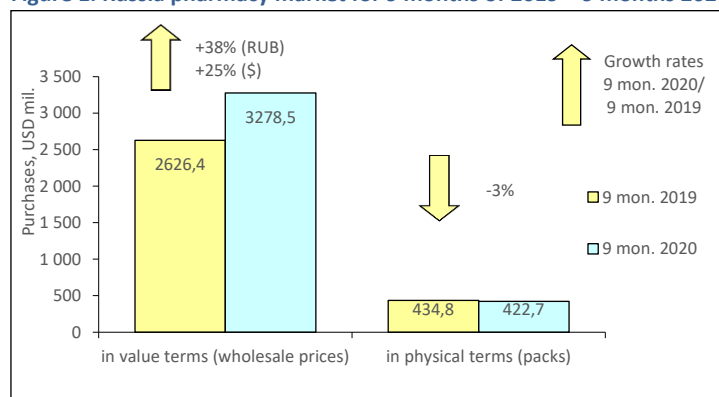
Rank	9 mon. 2020	9 mon. 2019	ATC code	ATC group	Share in total pharmacy sales, %	
					9 mon. 2020	9 mon. 2019
1	1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.6	5.2
2	2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.9	5.0
3	10	3	J05	ANTIVIRALS FOR SYSTEMIC USE	4.1	2.8
4	3	4	B01	ANTITHROMBOTIC AGENTS	3.8	3.8
5	6	5	J01	ANTIBACTERIALS FOR SYST USE	3.6	3.4
6	4	6	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.5	3.8
7	5	7	R01	NASAL PREPARATIONS	3.3	3.5
8	7	8	N02	ANALGESICS	3.2	3.1
9	8	9	C05	VASOPROTECTIVES	2.9	2.9
10	13	10	R05	COUGH AND COLD PREPARATIONS	2.7	2.7
Total					37.5	36.1

Conclusion. Based on the results for the first quarter of 2020, the pharmacy retail market of the country brought in RUB 811.640 bil. (USD 11.497 bil.). Compared to the same period in 2019, the growth was positive in terms of roubles (+6%), but negative (-2%) in terms of dollars. In pack terms, the market reduced by 2% compared to the previous year and amounted to 3.390 bil. packs. In January-September 2020, the average cost of an FPP pack in the national pharmacies was USD 3.39, whereas in the year-earlier period it was USD 3.40. The average expenses of the Russian Federation residents for purchase of OTC drugs in pharmacies reduced as compared to the previous year (USD 78.35 vs. USD 79.91).

RUSSIAN FEDERATION HOSPITAL MARKET: 2020 FIRST NINE MONTHS RESULTS

According to the results of the Budget Audit of FPPs in the Russian Federation (without DLO and regional benefit)TM, the national hospital market based on the results for January-September of 2020 reduced by 3% in physical terms and amounted to 422.660 mil. packs. In value terms, the market showed a 38% increase in terms of roubles and 25% in terms of dollars and reached RUB 234.427 bil. (USD 3.278 mil.) at wholesale prices. Based on the results for the first nine months of 2020, the average price per FPP pack in the hospital sector of the country was USD 7.76, whereas in the year-earlier period its price was USD 6.04.

Figure 1. Russia pharmacy market for 9 months of 2019 – 9 months 2020



At the end of January-September 2020, the leader changed in the top ten drug manufacturers rating in the hospital market of Russia: MSD moved up to rank one from two due to 73% growth in purchases (Table 1). ROCHE moved up to rank two from four (2.1-growth in purchases). BIOCAD (+34%), which had topped the rating earlier, but was not so dynamic rounded out the top three drug manufacturers ranking. One of the two new manufacturers, BRISTOL MYERS (2.3-fold growth), moved up to rank four. The second manufacturer to break into the top ten rating for the first time, GLAXOSMITHKLINE (2.1-fold growth), rounded out the top ten ranking. Among the remaining manufacturers, PHARMASYNTEZ (+40%), which maintained its positions, as well as SANOFI (+46%) and JOHNSON & JOHNSON (+65%), which moved up to ranks six and seven, developed their markets at a fast pace. At the same time, the less dynamic PFIZER (+4%) and MICROGEN (+27%), on the contrary, moved down to ranks eight and nine. The total share of the top ten brands increased by almost 6 p.p. and accounted for 46.4%.

Table 1. The top 10 drug manufacturers by hospital purchases

Rank in the top ten		Manufacturer*	Share in total hospital purchases, %	
9 mon. 2020	9 mon. 2019		9 mon. 2020	9 mon. 2019
1	2	MSD	7.2	5.7
2	4	ROCHE	6.7	4.4
3	1	BIOCAD RF	6.3	6.4
4	11	BRISTOL MYERS SQU	4.4	2.6
5	5	PHARMASYNTEZ	4.2	4.2
6	8	SANOFI	3.9	3.7
7	9	JOHNSON & JOHNSON	3.8	3.2
8	3	PFIZER	3.6	4.8
9	6	MICROGEN	3.4	3.7
10	14	GLAXOSMITHKLINE	2.9	2.0
Total			46.4	40.6

*AIPM members are in bold

The brands, which increased the purchases by two or more times, moved up to the first ranks of the top-10 brands ranking (Table 2). OPDIVO (2.3-fold increase in purchases) and KEYTRUDA (2.4-fold growth) moved up to the first ranks, and TIVICAY (2.4-fold growth) broke into the top ten for the first time, coming in at rank four. At the same time, they displaced SOVIGRIPP brand (+50%) down one rank, moving to rank three despite the outstripping growth rates. The markets of three more brands developed at a fast pace. One of them, AVEGRA (+64%), held its previous rank five, while PERJETA (+81%) and PENTAXIM (+53%) moved up to the higher ranks six and nine, respectively. At the same time, HERTICAD (+13%) and PREVENAR 13 (-20%), which showed low and negative growth rates, on the contrary, moved down to ranks seven and ten. ISENTRESS (+36%) held its previous rank eight. The total share of the top 10 brands in the hospital market expanded from 19.5% to 23.1%.

Table 2. The top 10 brands by hospital purchases

Rank in the top ten		Brand	Share in total hospital purchases, %	
9 mon. 2020	9 mon. 2019		9 mon. 2020	9 mon. 2019
1	4	OPDIVO	3.5	2.1
2	6	KEYTRUDA	3.4	2.0
3	2	SOVIGRIPP	2.7	2.5
4	11	TIVICAY	2.5	1.4
5	5	AVEGRA BIOCAD	2.4	2.0
6	9	PERJETA	1.9	1.5
7	3	HERTICAD	1.7	2.1
8	8	ISENTRESS	1.7	1.7

Rank in the top ten		Brand	Share in total hospital purchases, %	
9 mon. 2020	9 mon. 2019		9 mon. 2020	9 mon. 2019
9	10	PENTAXIM	1.6	1.5
10	1	PREVENAR 13	1.6	2.8
Total			23.1	19.5

In contrast to the above rankings, the leader of the top ten INNs and grouping names ranking did not change: INN VACCINE, INFLUENZA (+ 67%) retained and strengthened its positions due to high growth rates (Table 3). It should be noted that most of the INNs of this rating, just like the leader, demonstrated outstripping sales growth. NIVOLUMAB (2.30-fold growth in purchases), PEMBROLIZUMAB and DOLUTEGRAVIR (2.4-fold growth) showed more than two-fold growth, which allowed them to move up to ranks two, three and five, respectively. On top of that, the latter became one of two newcomers of the top 10 ranking. The second newcomer to break into it for the first time, VACCINE, ACCEL.PERT.DIP.TET. POLIO & HIB (+ 53%) rounds out the top ten ranking. Markets of BEVACIZUMAB (+57%) that held its previous rank four, as well as those of PERTUZUMAB (+81%) and RALTEGRAVIR (+36%) that moved to ranks seven and eight developed at a fast pace. The less dynamic TRASTUZUMAB (+24%) and LOPINAVIR*RITONAVIR (+10%) lost three ranks each and moved down to ranks six and nine. The total share accumulated by the top-ten INNs and grouping names increased from 20.5 to 25.4%.

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

Rank		INNs/Grouping Names	Share in total hospital purchases, %	
9 mon. 2020	9 mon. 2019		9 mon. 2020	9 mon. 2019
1	1	VACCINE, INFLUENZA	4.4	3.7
2	5	NIVOLUMAB	3.5	2.1
3	7	PEMBROLIZUMAB	3.4	2.0
4	4	BEVACIZUMAB	2.5	2.2
5	12	DOLUTEGRAVIR	2.5	1.4
6	3	TRASTUZUMAB	2.3	2.5
7	10	PERTUZUMAB	1.9	1.5
8	9	RALTEGRAVIR	1.7	1.7
9	6	LOPINAVIR*RITONAVIR	1.6	2.1
10	11	VACCINE, ACCEL.PERT.DIP.TET. POLIO & HIB	1.6	1.5
Total			25.4	20.5

The top ten INNs and grouping names continued to show high stability (Table 4). It has not changed in composition and six of its ATC groups held their previous ranks. These are the top-ranking L01 Antineoplastic drugs (+61%), J05 Antivirals for systemic use (+56%), J07 Vaccines (+27%), J01 Antibacterials for systemic use (+52%), B05 Plasma substitution and perfusion solutions (+16%) and B01 Antithrombotic agents (+32%). Some shifts took place in the lower part of the top-10 ranking. At the same time, L04 immunosuppressants (+79%) and L02 Endocrine therapy (+61%), which showed the outperformance growth rates, moved up to ranks seven and eight, displacing V08 Contrast media (+14%) and J04 Antimycobacterials down to the last ranks (-11%). In total, the top ten ATC groups accumulated 81.5% of the hospital market, whereas in the year-earlier period - 76.4%.

Table 4. The top ten ATC groups by hospital purchases

Rank		ATC code	ATC group	Share in total hospital purchases, %	
9 mon. 2020	9 mon. 2019			9 mon. 2020	9 mon. 2019
1	1	L01	ANTINEOPLASTIC AGENTS	33.6	28.7
2	2	J05	ANTIVIRALS FOR SYSTEMIC USE	14.3	12.6
3	3	J07	VACCINES	10.9	11.8
4	4	J01	ANTIBACTERIALS FOR SYST USE	6.7	6.1
5	5	B05	PLASMA SUBSTITUTES AND PERFUSION SOLUTIONS	3.8	4.6
6	6	B01	ANTITHROMBOTIC AGENTS	3.4	3.6
7	9	L04	IMMUNOSUPPRESSANTS	2.8	2.2
8	10	L02	ENDOCRINE THERAPY	2.4	2.1
9	8	V08	CONTRAST MEDIA	1.9	2.2
10	7	J04	ANTIMYCOBACTERIALS	1.6	2.4
Total				81.5	76.4

Conclusion. At the end of the first nine months of 2020, the Russian hospital market showed high positive growth rates both in rouble terms (+38%) and in dollar terms (+25%) and brought in RUB 234.427 bil. (USD 3.278 bil.). In physical terms, the market also showed positive growth rates, though not so high (-3%) and amounted to 422.660 mil. packs. At the end of January-September of 2020, the average cost of a finished pharmaceutical product (FPP) pack in the national hospital sector amounted to USD 7.76 vs. USD 6.04 in 2019.

PHARMACEUTICAL MARKET OF THE CENTRAL FEDERAL DISTRICT (CFD) IN 1-3 QUARTER OF 2020 KEY PERFORMANCE INDICATORS

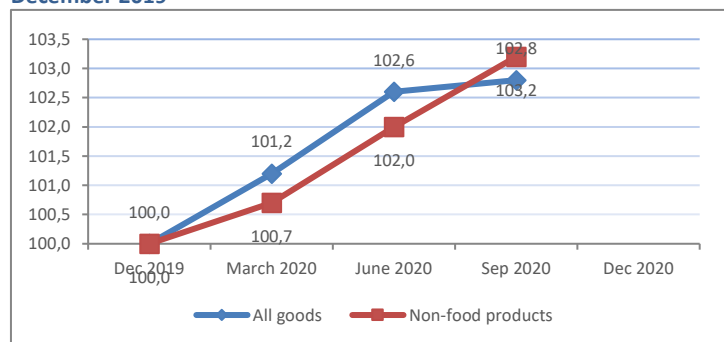
Macroeconomic indices

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

Value	September-January 2020	September-January 2020 (%) vs September-January 2019
Industrial production index		103.6
Retail turnover, RUB bil.	8,336.7	96.0
Monthly average accrued wage per worker (nominal), RUB	62,627	106.0
real		103.1

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. Movement of weighted average prices and retail margins in 1-3 Q 2019 - 1-3 Q, 2020

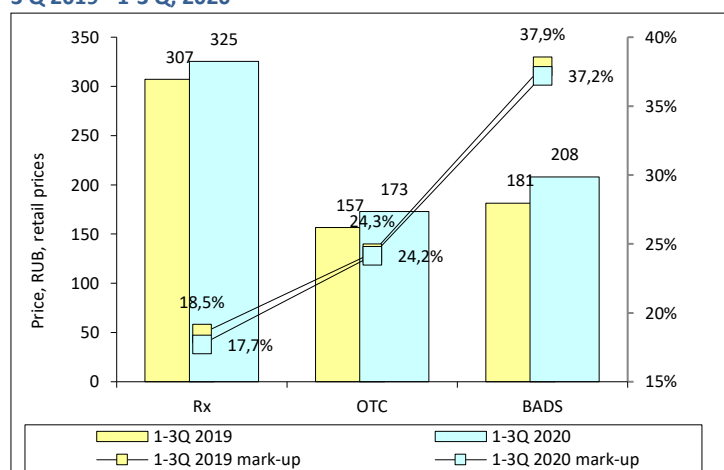
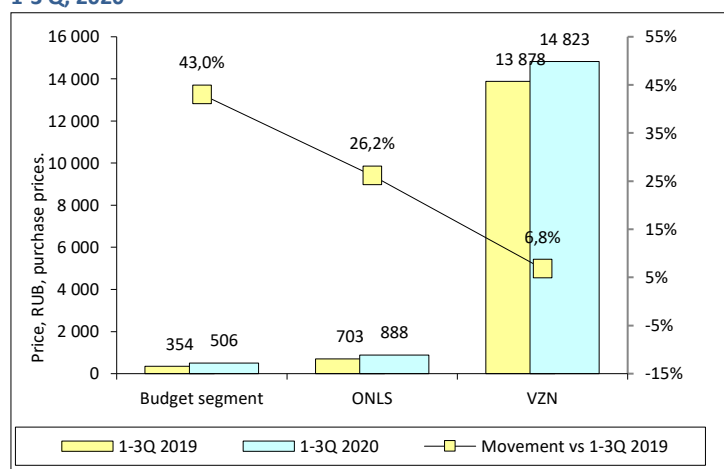


Figure 2. Movement of weighted average purchase prices in 1-3 Q 2019 - 1-3 Q, 2020



Indicators of the market behaviour and profile³

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

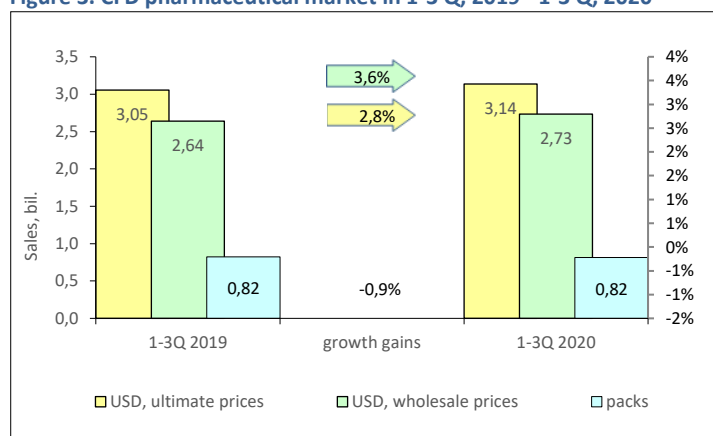


Figure 4. Structure of CFD pharmaceutical market by major segments in 1-3 Q, 2019 - 1-3 Q, 2020

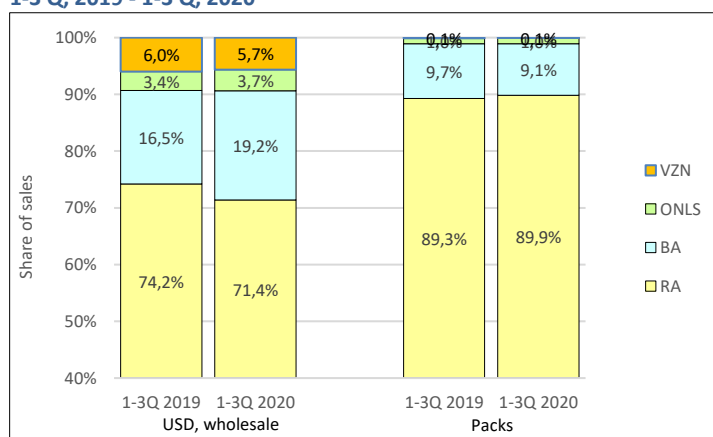


Figure 5. Structure of the retail segment of CFD market in 1-3 Q, 2019 - 1-3 Q, 2020

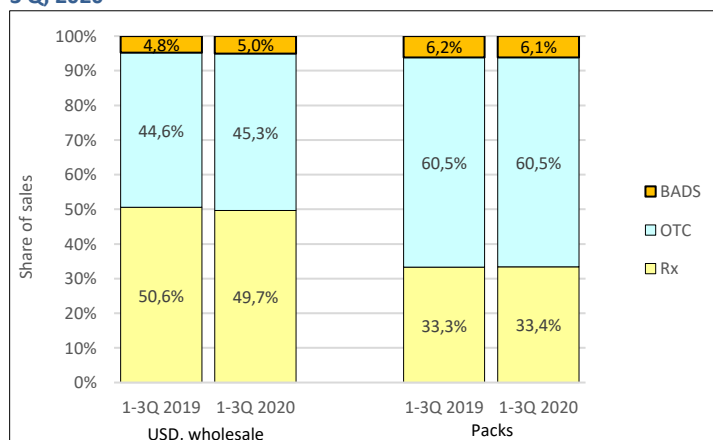
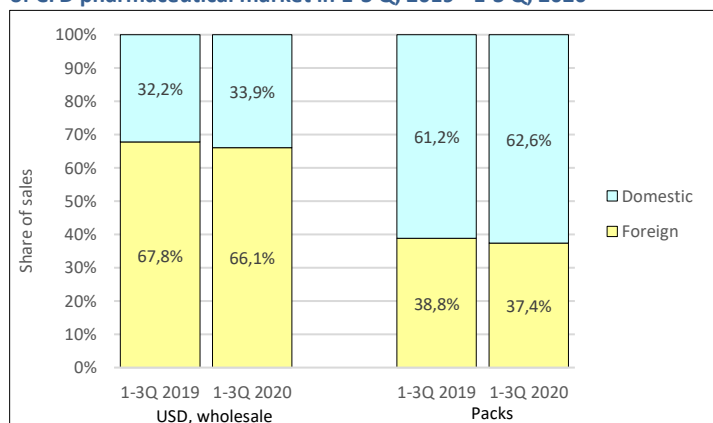


Figure 6. Movement of the Russian/foreign drugs share in the structure of CFD pharmaceutical market in 1-3 Q, 2019 - 1-3 Q, 2020



³ Exclusive of Moscow

PHARMACEUTICAL MARKET OF THE NORTH-- WESTERN FEDERAL DISTRICT (NWFD) IN 1-3 Q, 2020 KEY PERFORMANCE INDICATORS

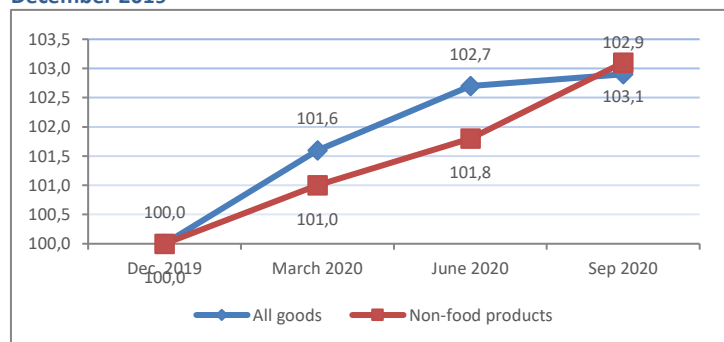
Macroeconomic indices

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

Value	September-January 2020	September-January 2020 (%) vs September-January 2019
Industrial production index		97.0
Retail turnover, RUB bil.	2,439.7	98.3
Monthly average accrued wage per worker (nominal), RUB	55,283	104.5
real		101.3

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. Movement of weighted average prices and retail margins in 1-3 Q 2019 - 1-3 Q 2020

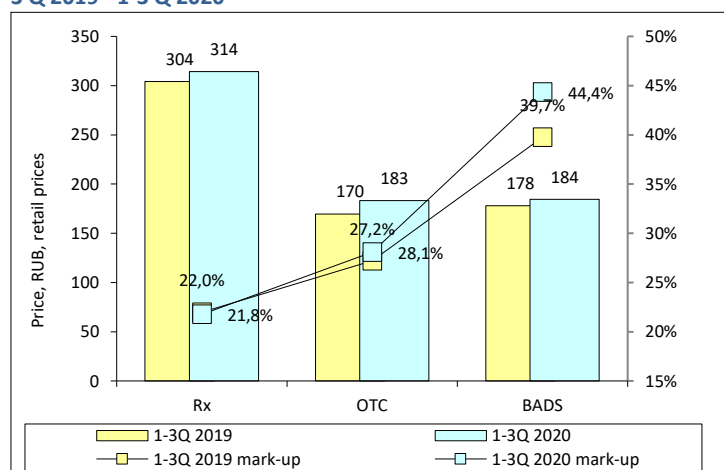
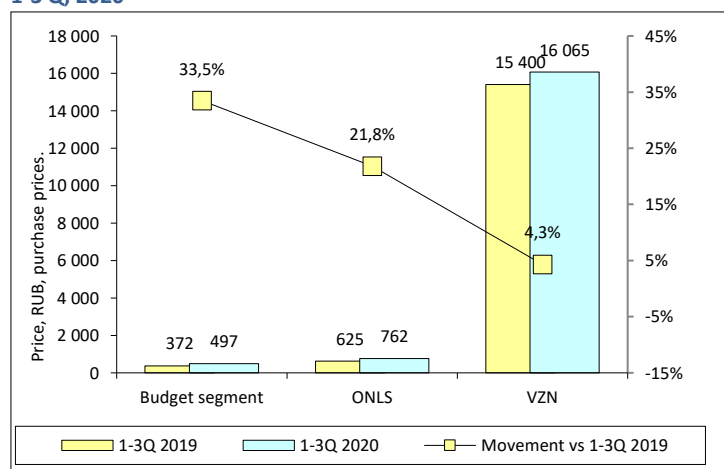


Figure 2. Movement of weighted average purchase prices in 1-3 Q 2019 - 1-3 Q, 2020



Indicators of the market behaviour and profile⁴

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

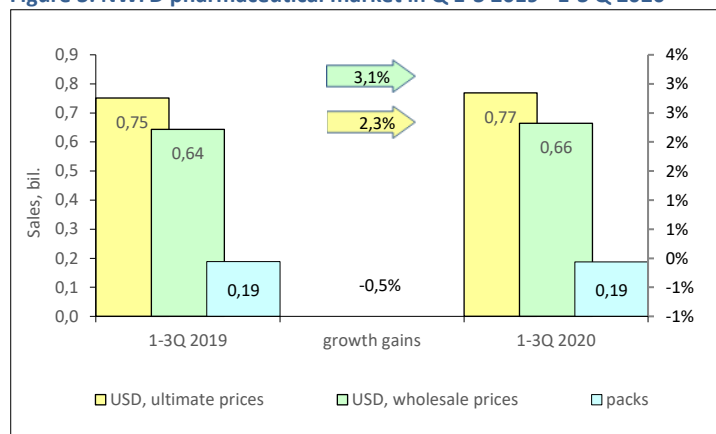


Figure 4. Structure of NWFD pharmaceutical market by major segments in 1-3 Q, 2019 - 1-3 Q, 2020

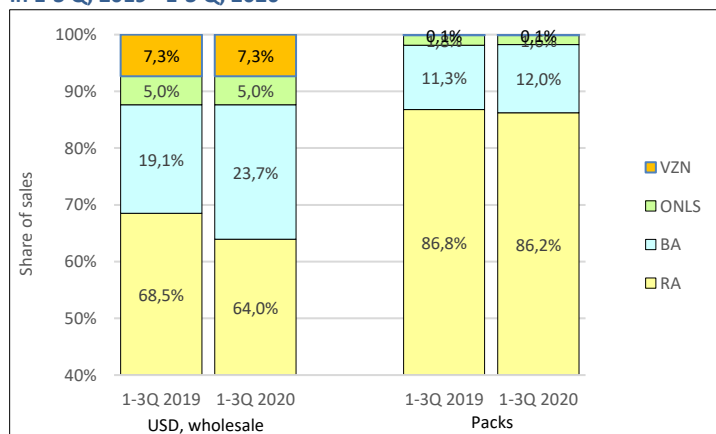


Figure 5. Structure of the retail segment of NWFD pharmaceutical market in 1-3 Q 2019 - 1-3 Q 2020

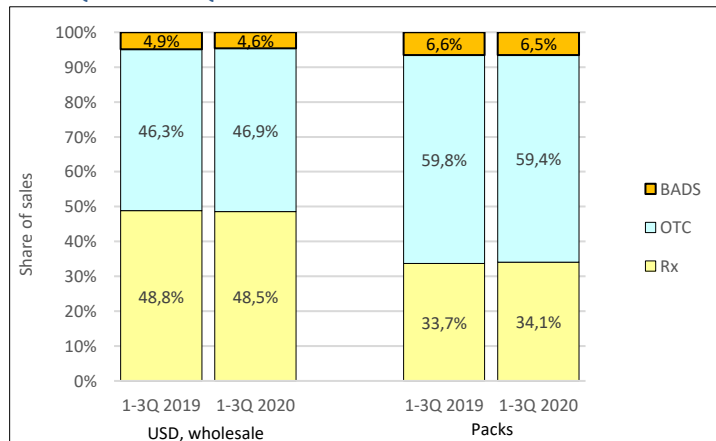
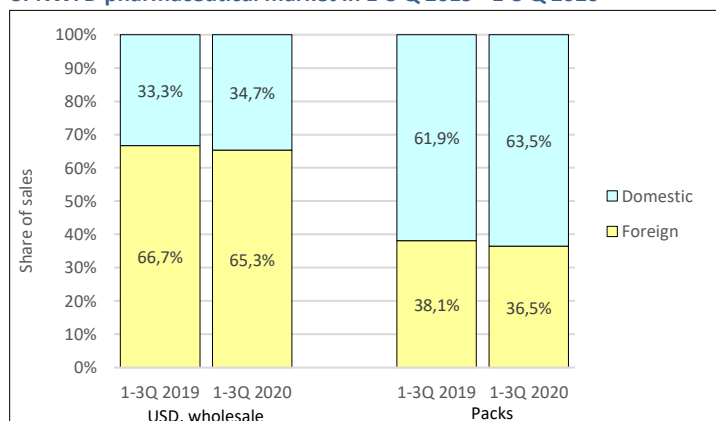


Figure 6. Movement of the Russian/ foreign drugs share in the structure of NWFD pharmaceutical market in 1-3 Q 2019 - 1-3 Q 2020



⁴ Exclusive of St. Petersburg

PHARMACEUTICAL MARKET OF THE VOLGA FEDERAL DISTRICT (VFD) IN 1-3 Q 2020 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	September-January 2020	September-January 2020 (%) vs September-January 2019
Industrial production index		96.2
Retail turnover, RUB bil.	4,136.8	94.8
Monthly average accrued wage per worker (nominal), RUB	35,717	105.4
real		102.3

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. Movement of weighted average prices and retail margins in 1-3 Q 2019 - 1-3 Q 2020

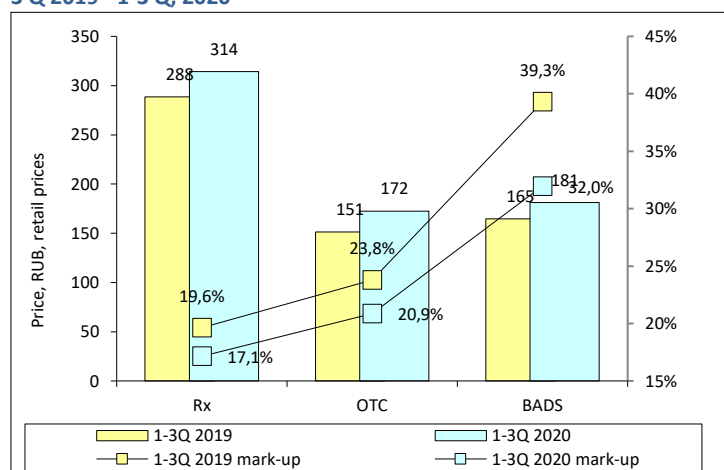
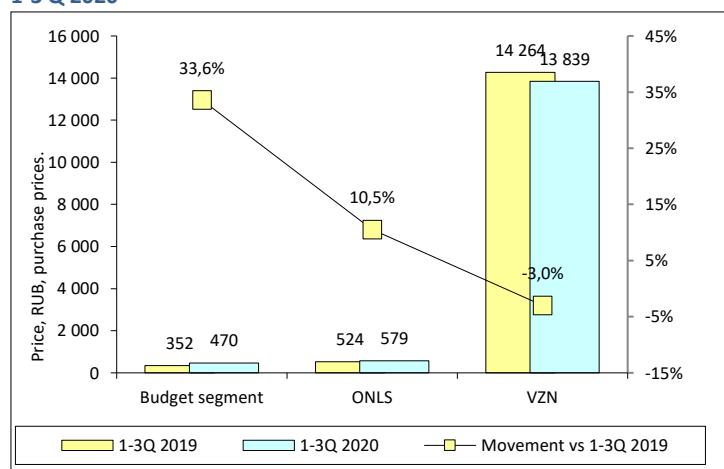


Figure 2. Movement of weighted average purchase prices in 1-3 Q 2019 - 1-3 Q 2020



Indicators of the movement and structure of the market

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

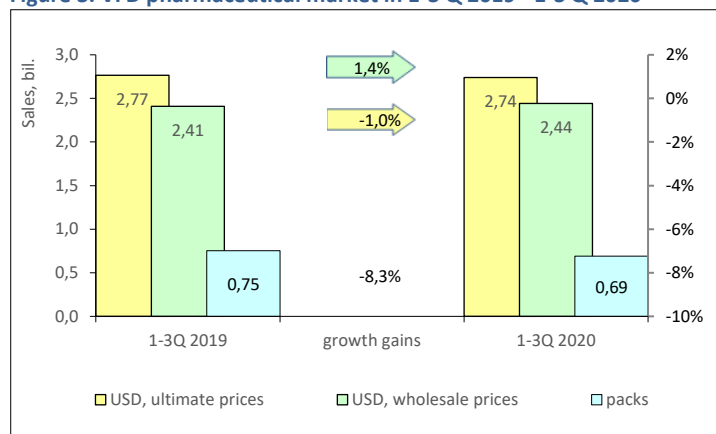


Figure 4. Structure of VFD pharmaceutical market by major segments in 1-3 Q 2019 - 1-3 Q 2020

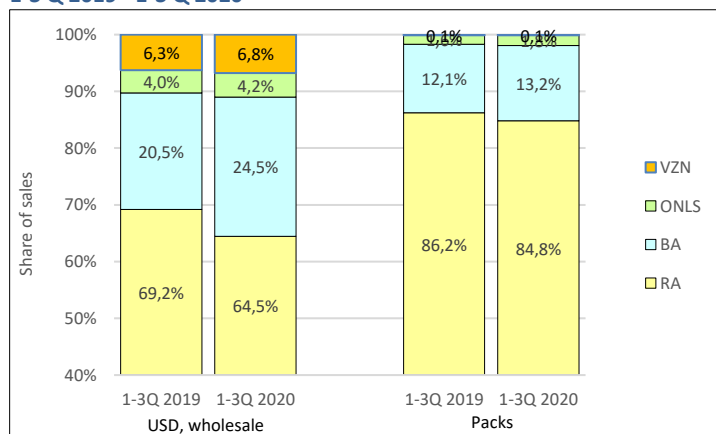


Figure 5. Structure of the retail segment of VFD market in 1-3 Q 2019 - 1-3 Q 2020

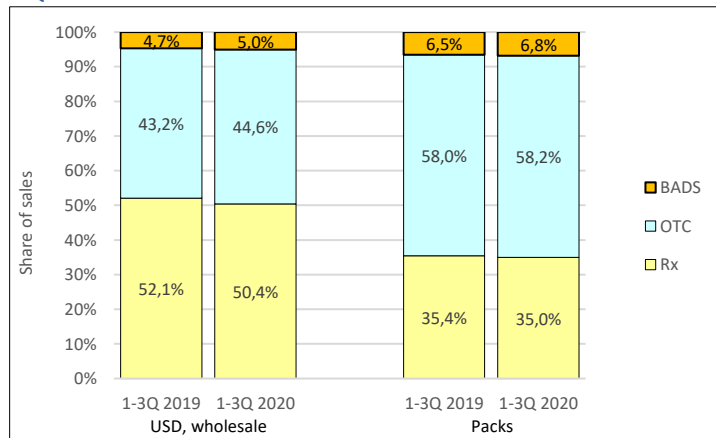
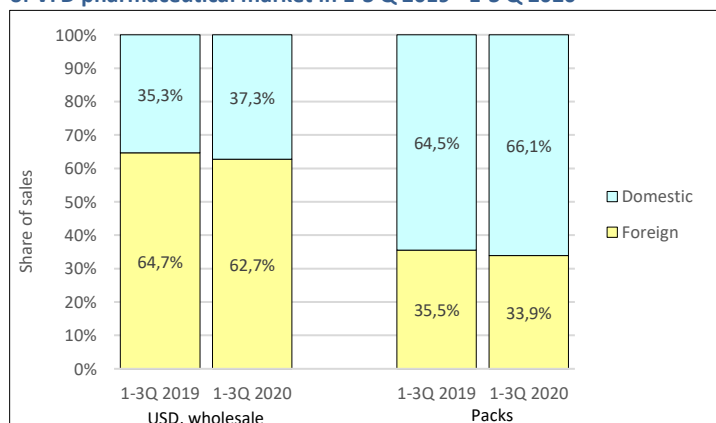


Figure 6. Movement of the Russian/foreign drugs share in the structure of VFD pharmaceutical market in 1-3 Q 2019 - 1-3 Q 2020



PHARMACEUTICAL MARKET OF THE URAL FEDERAL DISTRICT (UrFD) IN 1-3 Q, 2020 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	September-January 2020	September-January 2020 (%) vs September-January 2019
Industrial production index		98.3
Retail turnover, RUB bil.	2,053.6	96.3
Monthly average accrued wage per worker (nominal), RUB	53,036	105.6
real		102.7

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. Movement of weighted average prices and retail margins in 1-3 Q 2019 - 1-3 Q 2020

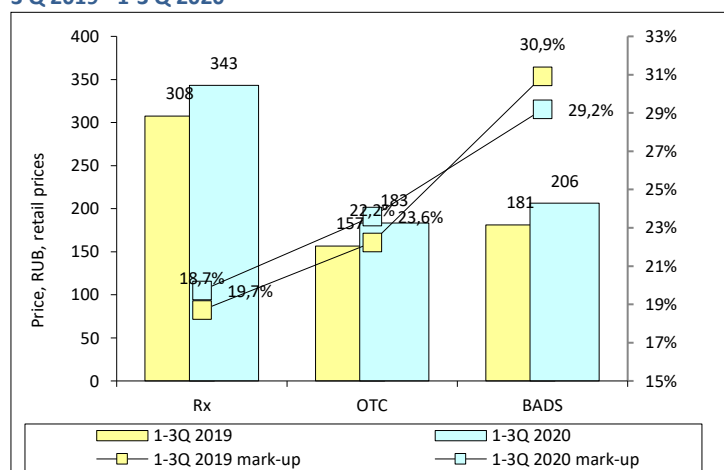
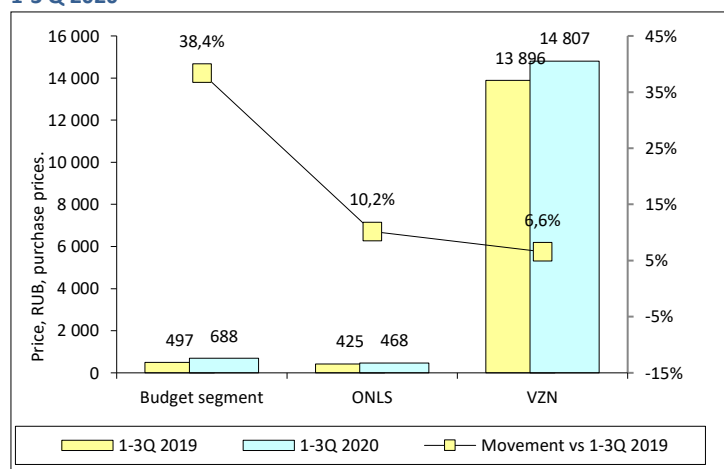


Figure 2. Movement of weighted average purchase prices in 1-3 Q 2019 - 1-3 Q 2020



Indicators of the market behaviour and profile

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

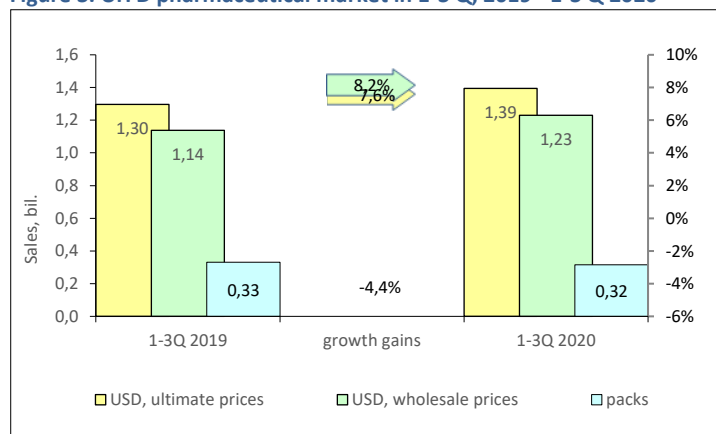


Figure 4. Major sector profile of UFD pharmaceutical market in 1-3 Q 2019 - 1-3 Q 2020

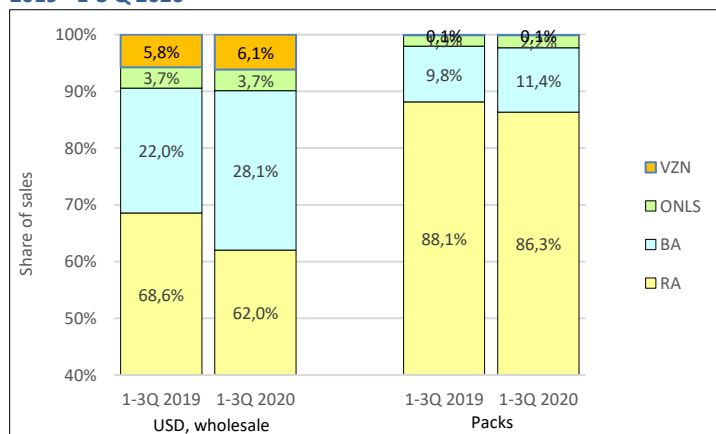


Figure 5. Retail sector profile of UrFD pharmaceutical market in 1-3 Q 2019 - 1-3 Q 2020

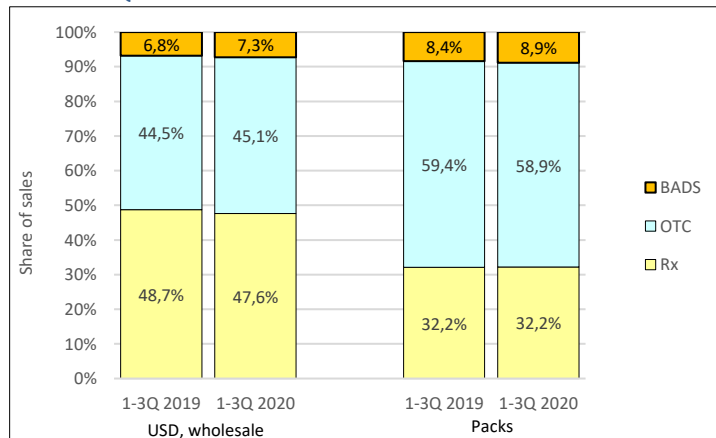
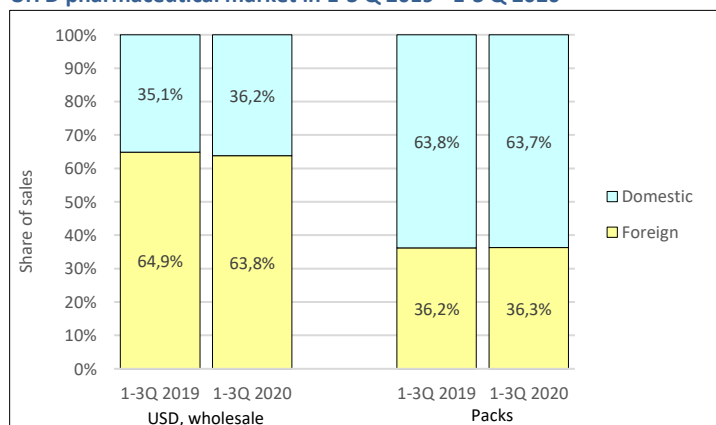


Figure 6. Movement of the Russian/ foreign drugs share in the profile of UrFD pharmaceutical market in 1-3 Q 2019 - 1-3 Q 2020



PHARMACEUTICAL MARKET OF THE SIBERIAN FEDERAL DISTRICT (SiFD) IN 1-3 Q 2020 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	September-January 2020	September-January 2020 (%) vs September-January 2019
Industrial production index		95.6
Retail turnover, RUB bil.	2,097.3	95.5
Monthly average accrued wage per worker (nominal), RUB	42,623	106.1
real		102.8

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. Movement of weighted average prices and retail margins in 1-3 Q 2019 – 1-3 Q 2020

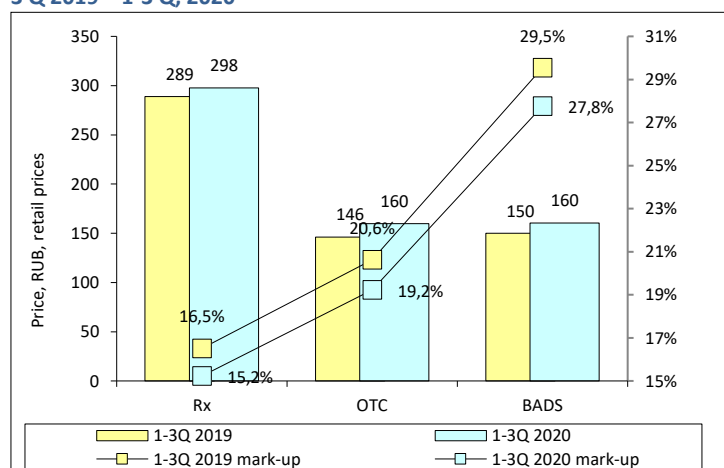
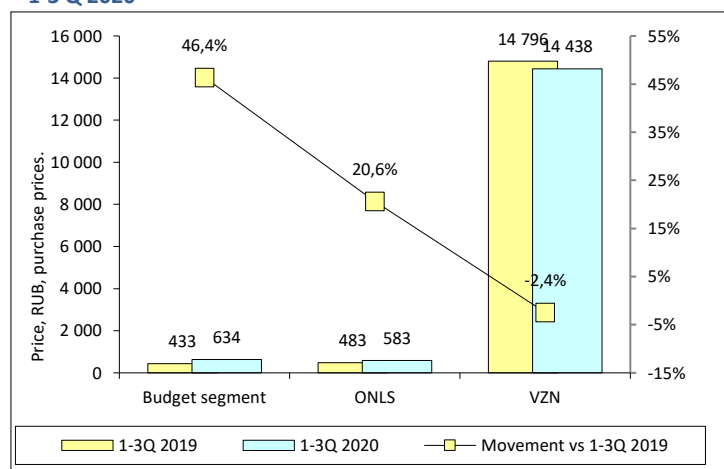


Figure 2. Movement of weighted average purchase prices in 1-3 Q 2019 – 1-3 Q 2020



Indicators of the market behaviour and profile

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

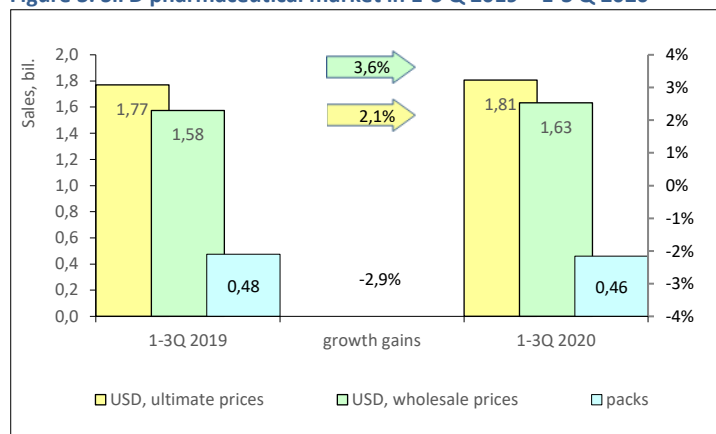


Figure 4. Major sector profile of SiFD pharmaceutical market in 1-3 Q 2019 - 1-3 Q 2020

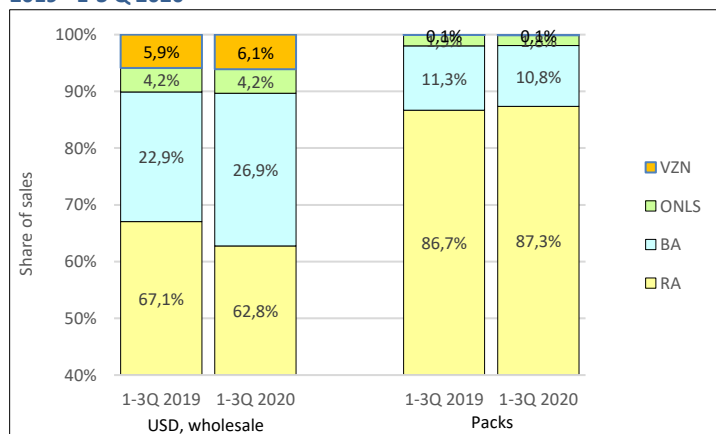


Figure 5. Retail sector profile of SiFD market in 1-3 Q 2019 - 1-3 Q 2020

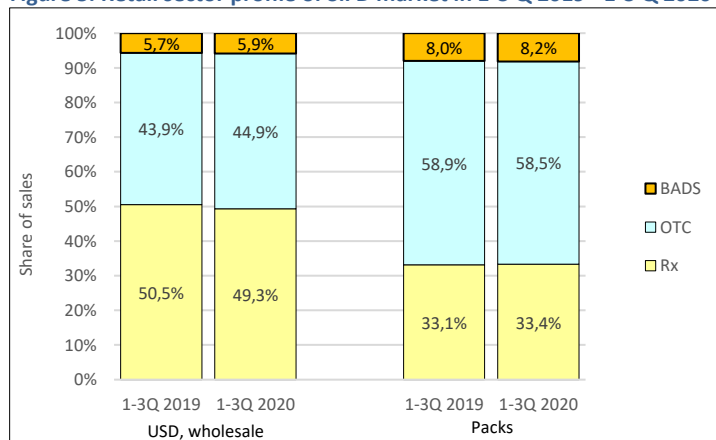
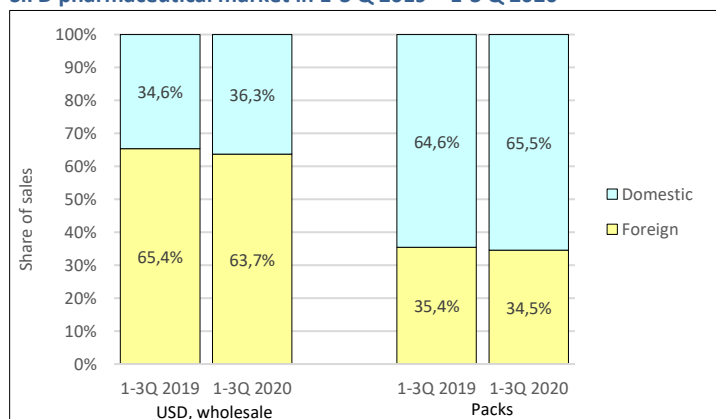


Figure 6. Movement of the Russian/foreign drugs share in the profile of SiFD pharmaceutical market in 1-3 Q 2019 – 1-3 Q 2020



PHARMACEUTICAL MARKET OF THE SOUTHERN FEDERAL DISTRICT (SoFD) IN 1-3 Q 2020 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	September-January 2020	September-January 2020 (%) vs September-January 2019
Industrial production index		98.6
Retail turnover, RUB bil.	2,466.4	94.2
Monthly average accrued wage per worker (nominal), RUB	35,062	104.1
real		101.3

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. Movement of weighted average prices and retail margins in 1-3 Q 2019 – 1-3 Q 2020

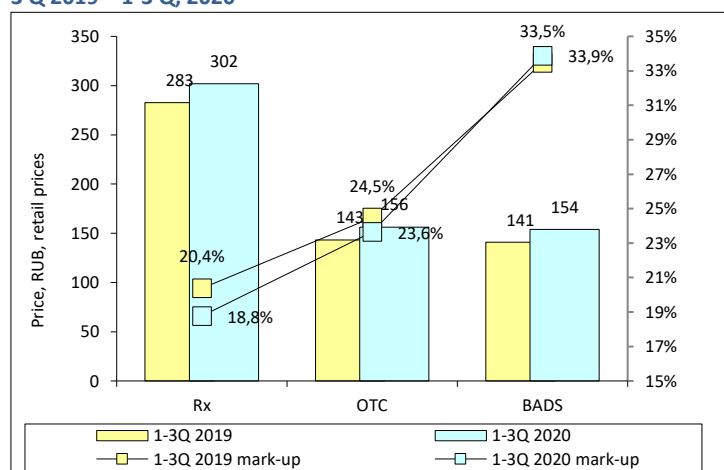
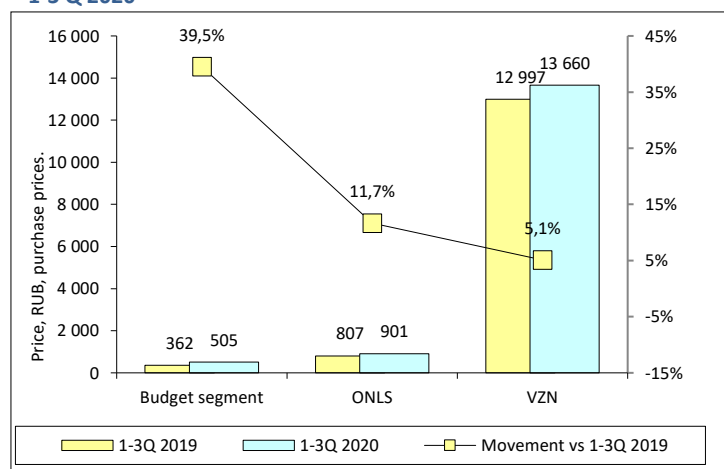


Figure 2. Movement of weighted average purchase prices in 1-3 Q 2019 – 1-3 Q 2020



Indicators of the market behaviour and profile

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

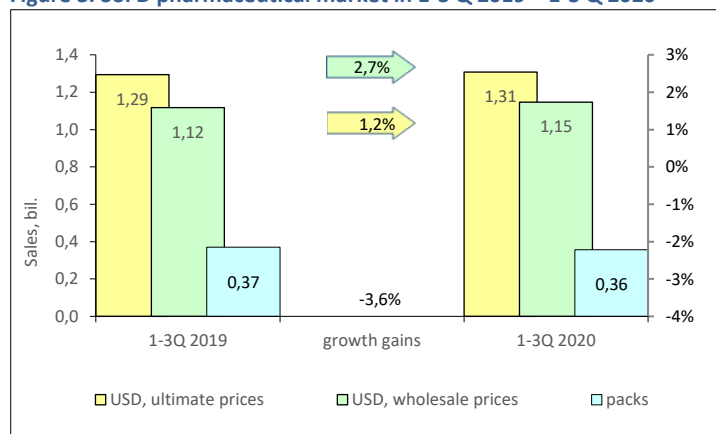


Figure 4. Major sector profile of SoFD pharmaceutical market in 1-3 Q 2019 – 1-3 Q 2020

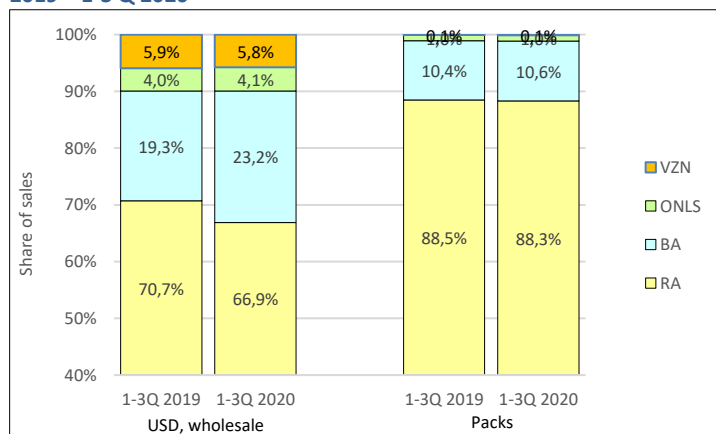


Figure 5. Retail sector profile of SoFD pharmaceutical market in 1-3 Q 2019 – 1-3 Q 2020

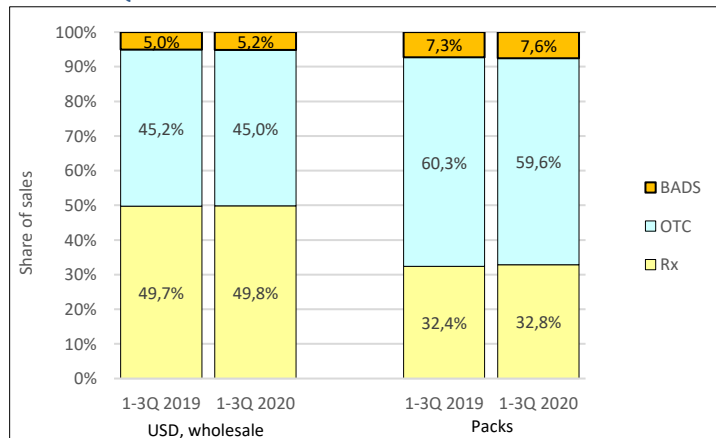
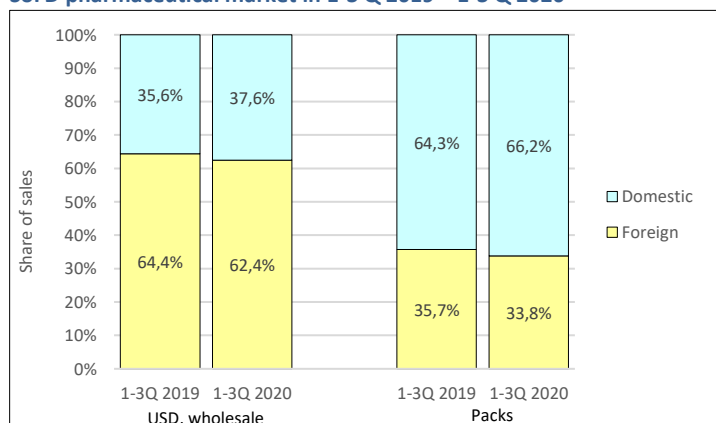


Figure 6. Movement of the Russian/foreign drugs share in the profile of SoFD pharmaceutical market in 1-3 Q 2019 – 1-3 Q 2020



PHARMACEUTICAL MARKET OF THE FAR EASTERN FEDERAL DISTRICT (FEFD) IN 1-3 Q 2020 KEY PERFORMANCE INDICATORS

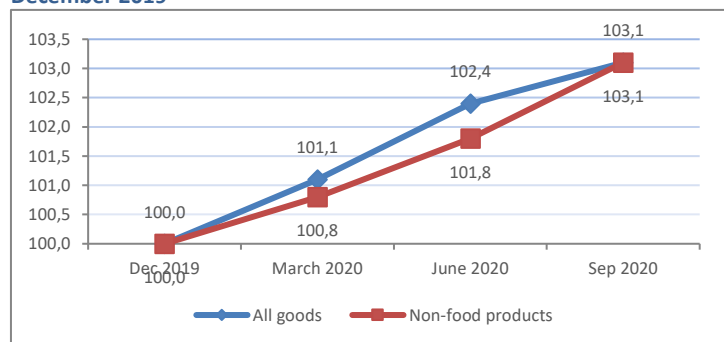
Macroeconomic indices

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

Value	September-January 2020	September-January 2020 (%) vs September-January 2019
Industrial production index		95.4
Retail turnover, RUB bil.	1,322.5	95.0
Monthly average accrued wage per worker (nominal), RUB	57,896	105.5
real		101.7

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 margins

Figure 1. Movement of weighted average prices and retail margins in 1-3 Q 2019 – 1-3 Q 2020

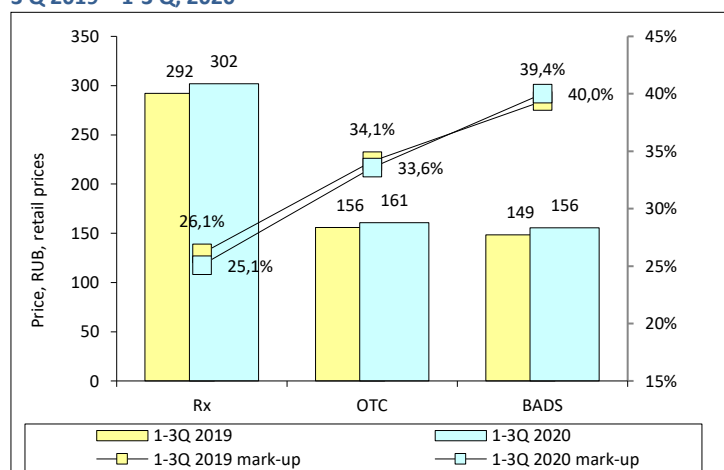
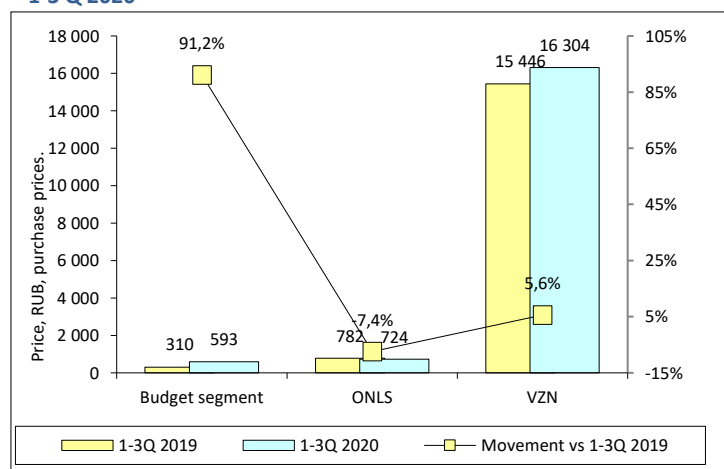


Figure 2. Movement of weighted average purchase prices in 1-3 Q 2019 – 1-3 Q 2020



Indicators of the market behaviour and profile

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

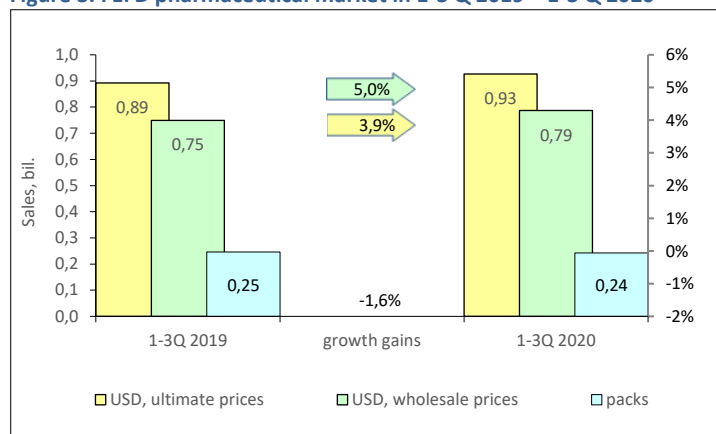


Figure 4. Major sector profile of FEFD pharmaceutical market in 1-3 Q 2019 – 1-3 Q 2020

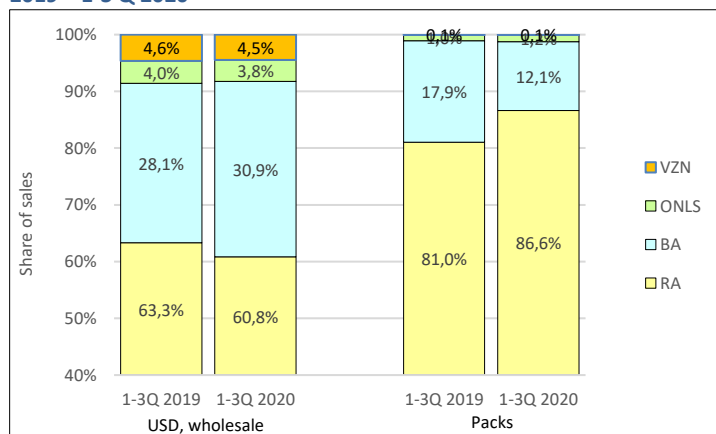


Figure 5. Retail sector profile of FEFD pharmaceutical market in 1-3 Q 2019 – 1-3 Q 2020

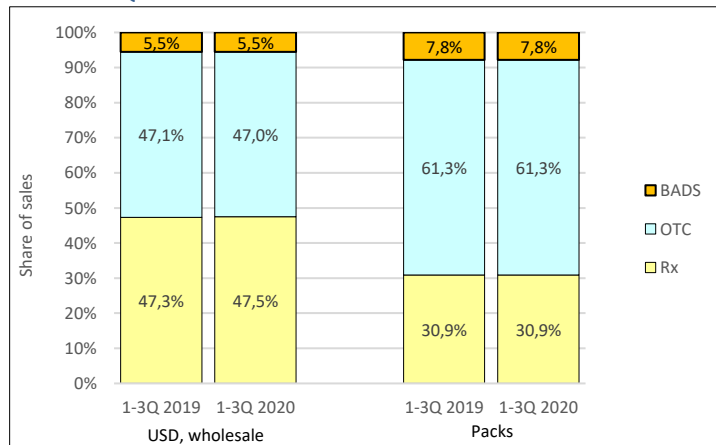


Figure 6. Movement of the Russian/foreign drugs share in the profile of FEFD pharmaceutical market in 1-3 Q 2019 – 1-3 Q 2020

