

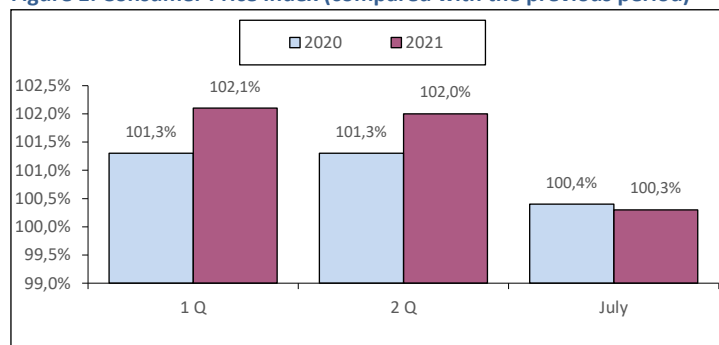
MACROECONOMIC INDICES

Inflation

According to Federal State Statistics Service's data, the Consumer Price Index was estimated at 100.3% in July 2021 as compared to the previous month, 104.5% against December of 2020.

In July 2021, the Industrial Producer Price Index was 102.6% as compared to the previous month, in the month-earlier period it had amounted to 102.9%. The index accounted for 123.0% against December of 2020.

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



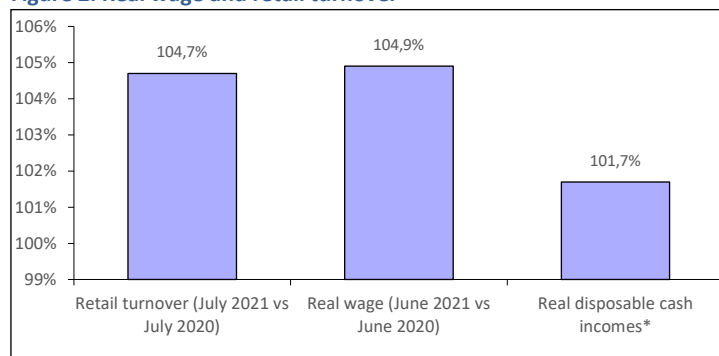
Living standard

In June 2021, a gross monthly average wage of corporate employees reached RUB 58782 (USD 810.67). It accounted for 111.7% compared to June 2020, and 104.3% compared to the previous period. In June of 2021, the real gross wage accounted for 104.9% as compared to June of 2020, and 103.6% against the prior period. According to estimates¹, real disposable cash incomes increased by 1.7% in the first half of 2021 as compared to the first half of 2020 (Fig. 2).

Retail turnover

In July 2021, the retail turnover was equal to RUB 3276.4 bil. or 104.7% (in comparable prices) against the respective period of the previous year, and RUB 21366.9 bil. or 109.3% in January - July 2021 (Fig. 2).

Figure 2. Real wage and retail turnover



* First half of 2021 vs first half of 2020

Industrial Production

According to Federal State Statistics Service's data, in July 2021 Industrial Production Index accounted for 106.8% compared to the same period in the previous year, and 104.4% in January-July 2021.

According to Federal State Statistics Service's data, Industrial Production Index for drugs and medical products accounted for 161.4% in July 2021 compared to the same period of 2020, and 138.0% in January-July vs January-July of 2020.

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 July of 2021.

Table 1. The top ten Russian chemical and pharmaceutical manufacturers by sales volume in July 2021

Rank	Manufacturer	RUB mil.
1	Biocad	2926.3
2	Otcpharm	2763.0
3	R-Pharm	2314.3
4	Stada	2127.8
5	Pharmstandart	1790.9
6	Binnopharm	1750.5
7	Pharmasyntez	1613.1
8	Microgen	1494.5
9	Grotex	1215.0
10	Atoll	1202.2

Source - Remedium according to IQVIA's data

Table 2 provides pharmacy sales data from 10 regions of the Russian Federation. In June 2021 compared to the previous month, sales (in terms of roubles) increased in all regions. Novosibirsk Region showed the highest growth (+41%), whereas Perm (+11%), Tatarstan and Tumen (+12% each) showed the lowest one.

Table 2. Pharmacy sales in the regions, 2021

Region	Pharmacy sales, USD mil. (wholesale prices)			Growth gain, % (roubles)		
	April 2021	May 2021	June 21	April/March 21	May/ April 21	June/ May 21
Moscow	150.5	136.2	167.3	-21%	-12%	20%
St. Petersburg	61.6	53.8	76.2	-15%	-15%	39%
Krasnodar Krai	40.7	38.0	46.3	-14%	-9%	19%
Krasnoyarsk Krai	23.2	21.2	25.8	-11%	-11%	19%
Tatarstan	19.7	17.9	20.4	-2%	-12%	12%
Rostov Region	24.1	22.6	26.1	-15%	-9%	13%
Novosibirsk Region	20.5	18.7	27.0	-11%	-11%	41%
Voronezh Region	13.8	12.9	15.3	-17%	-9%	17%
Perm	9.4	8.3	9.4	-10%	-13%	11%
Tyumen	8.3	7.7	8.8	-11%	-10%	12%

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 2021

Rank	Company*	Quantity of broadcasts
1	Otcpharm	7,872
2	Berlin-Chemie/Menarini	7,558
3	Johnson & Johnson	5,525
4	Sandoz	5,178
5	Teva	4,961

Source - Remedium according to Mediascope's data

Table 4. The top five brands in mass media in July 2021

Rank	Brand*	Quantity of broadcasts
1	Mig 400	2,163
2	Troxevasin	2,132
3	Evalar	2,082
4	Exoderil	1,956
5	Lioton 1000	1,954

Source - Remedium according to Mediascope's data

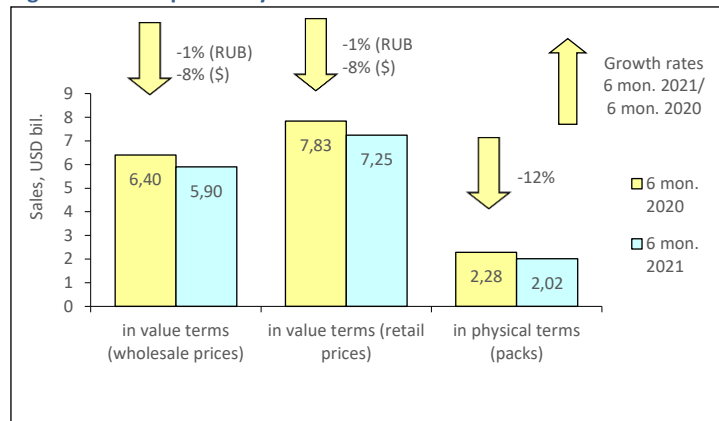
* Only drugs registered with National Medicine Register were considered.

¹ Due to switching of Federal State Statistics Service to the updated methodology for calculating real disposable cash incomes of the population, the data are published once a quarter.

RUSSIAN PHARMACY FPP DRUG MARKET: 2021 FIRST SIX MONTHS RESULTS

According to the results of the IQVIA Retail Audit of FPP (Finished Pharmaceutical Products) in Russian Federation™, at the end of the first six months of 2021 the drug market showed a tendency towards reduction of its sales in the country. The sales reduced by 12% to 2.019 bil. packs in physical terms as compared to the same period in 2020. In money terms, the market saw a 1% decrease in terms of roubles and 8% in terms of dollars. The volume of the market amounted to RUB 437.905 bil (USD 5.898 bil.) at wholesale prices (Fig. 1). The average cost of an OTC pack at retail prices proved to be higher than the previous year figure: USD 3.59 in the first half of 2021 vs USD 3.43 in 2020. Consumer spending for drugs in Russia averaged to USD 49.57 in January-June of 2021, whereas during the same period a year ago it averaged to USD 53.39.

Figure 1. Russia pharmacy market for 6 months of 2020 – 6 months 2021



According to the results for the first six months of 2021, most manufacturers from the top 10 manufacturers ranking reduced their sales (Table 1). They did not include the leader of the ranking BAYER (+8%), as well as STADA and ABBOTT (+2% each), which moved up to ranks three and seven. Despite the decrease in sales, the companies BERLIN-CHEMIE/MENARINI (-5%) and GLAXOSMITHKLINE (-4%) managed to improve their positions, moving up to ranks nine and ten, respectively. On top of that, the latter became the only newcomer of the top ten ranking. SANOFI (-12%), SERVIER and TEVA (-6% each), as well as KRKA (-3%) held their previous positions. And only OTCPHARM (-8%) lost one rank and moved down to rank four. In total, the top ten ATC groups accumulated 33.8% of the Russian retail market, whereas in the year-earlier period it accounted for 34.5%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	1	BAYER	5.1	4.6
2	2	SANOFI	3.8	4.3
3	4	STADA	3.7	3.6
4	3	OTCPHARM	3.5	3.8
5	5	SERVIER	3.2	3.4
6	6	TEVA	3.1	3.3
7	9	ABBOTT	3.0	2.9
8	8	KRKA	2.9	3.0
9	10	BERLIN-CHEMIE/MENARINI	2.8	2.9
10	11	GLAXOSMITHKLINE	2.7	2.8
Total			33.8	34.5

*AIPM members are in bold

XARELTO (+36%) remained the best-selling brand in the regional market (Table 2). In addition, another four brands of the top ten managed to hold their own. ARBIDOL (+6%), CONCOR (-1%), MEXIDOL (+8%) and PENTALGIN (+1%) maintained their previous ranks three, six, eight and nine, respectively. The other four manufacturers showed signs of growth. ELIQUIS (+68%) moved up to rank two from ten, DETRALEX (+8%) moved up to rank four from five. The newcomers HEPTRAL (+41%) and CARDIOMAGNYL (-1%) broke into the ranks of the top ten, moving up to numbers five and ten. NUROFEN reduced its sales by 11% and moved down from rank four to seven. The total share of the top 10 increased from 6.6% to 7.7%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	1	XARELTO	1.4	1.1
2	10	ELIQUIS	1.0	0.6
3	3	ARBIDOL	0.8	0.7
4	5	DETRALEX	0.8	0.7
5	16	HEPTRAL	0.7	0.5
6	6	CONCOR	0.7	0.7
7	4	NUROFEN	0.6	0.7

Rank in the top ten		Brand	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
8	8	MEXIDOL	0.6	0.6
9	9	PENTALGIN	0.6	0.6
10	11	CARDIOMAGNYL	0.5	0.5
Total			7.7	6.6

RIVAROXABAN (+36%) moved up to rank one from two in the top 10 INNs and group names ranking, while the former leader XYLOMETAZOLINE (-0.1%), on the contrary, moved down to rank two (Table 3). The composition DIOSMIN*HESPERIDIN (+11%) held its previous rank three. PANCREATIN (-0.1%) also held its previous rank six in the top ten. Three INNs from the remaining ones managed to rise in the ranks. BISOPROLOL (+0.3%) and ROSUVASTATIN (+5%) moved up one rank to numbers four and ten. On top of that, the latter broke into the ranks of the top 10 ranking for the first time. APIXABAN (+68%) became the second newcomer of the top ten, moving up to rank seven. INNs IBUPROFEN (-5%), NIMESULIDE (+2%) and UMIFENOVIR (+6%) lost one rank each, moving down to ranks five, eight and nine, respectively. The total share of the top-10 INN and generic names increased by 1 p.p. to 10.7%.

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

Rank in the top ten		INNs/Grouping Names	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	2	RIVAROXABAN	1.4	1.1
2	1	XYLOMETAZOLINE	1.4	1.4
3	3	DIOSMIN*HESPERIDIN	1.2	1.0
4	5	BISOPROLOL	1.0	1.0
5	4	IBUPROFEN	1.0	1.0
6	6	PANCREATIN	1.0	1.0
7	21	APIXABAN	1.0	0.6
8	7	NIMESULIDE	1.0	0.9
9	8	UMIFENOVIR	0.9	0.8
10	11	ROSUVASTATIN	0.8	0.8
Total			10.7	9.7

C09 Agents acting on the rennin-angiotensin system (-4%) and M01 Anti-inflammatory and antirheumatic products (+0.3%) held their previous leading positions in the top ten ATC groups ranking (Table 4). The groups B01 Antithrombotic agents (+20%), G03 Sex hormones (+4%) and R01 Nasal preparations (+1%) moved down to numbers three through five. C05 Vasoprotectives (+5%) and the newcomers N06 Psychoanaleptics (+7%) also managed to move to the higher ranks eight and ten. At the same time, J01 Antibacterials for systemic use (-14%), J05 Antivirals for systemic use (-26%) and N02 Analgesics (-7%), which showed a pronounced negative trend, moved down to ranks six, seven and nine, respectively. In total, the top ten ATC groups accumulated 37.0%, whereas the year-earlier period they accounted for 37.3%.

Table 4. The top ten ATC Groups by pharmacy sales

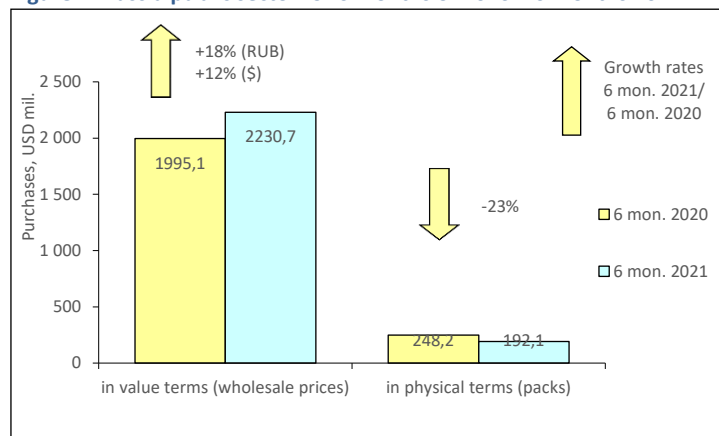
Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
6 mon. 2021	6 mon. 2020			6 mon. 2021	6 mon. 2020
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.5	5.6
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.9	4.8
3	4	B01	ANTITHROMBOTIC AGENTS	4.6	3.8
4	6	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.6	3.5
5	7	R01	NASAL PREPARATIONS	3.4	3.3
6	5	J01	ANTIBACTERIALS FOR SYST USE	3.1	3.6
7	3	J05	ANTIVIRALS FOR SYSTEMIC USE	3.0	4.1
8	10	C05	VASOPROTECTIVES	3.0	2.8
9	8	N02	ANALGESICS	3.0	3.2
10	11	N06	PSYCHOANALEPTICS	2.9	2.7
Total				37.0	37.3

Conclusion. Based on the results for the first six months of 2021, the pharmacy retail market of Russia brought in RUB 538.025 bil. (USD 7.246 bil.). As compared with the same period of 2020, the dynamics was negative both (-1%) in terms of roubles, and in terms of dollars (-8%). In pack terms, the market also showed decline (-12%) as compared to the previous year and amounted to 2.019 bil. packs. In January-June 2021, the average cost of an FPP pack in the national pharmacies was USD 3.59, in the year-earlier period it was USD 3.43. The average expenses of the Russian Federation residents for purchase of OTC drugs in pharmacies in the first half of 2021 reduced as compared to the previous year (USD 49.57 vs. USD 53.39).

RUSSIAN FEDERATION HOSPITAL MARKET: 2021 FIRST SIX MONTHS RESULTS

According to the results of the IQVIA Budget Audit of FPPs in the Russian Federation (without DLO and regional benefit)TM, the national budgetary segment based on the results for the first half of 2021 reduced by 23% in physical terms and amounted to 192.110 mil. packs. In value terms, the market showed a 18% increase in terms of roubles and 12% in terms of dollars and reached RUB 165.602 bil. (USD 2.231 mil.) at wholesale prices. Based on the results for the first six months of 2021, the average cost of an FPP pack in the hospital sector was USD 11.61, whereas in the year-earlier period its cost was USD 8.04.

Figure 1. Russia public sector for 6 months of 2020 – 6 months 2021



According to the results for the first half of 2021, most of the top 10 manufacturers in the public segment of Russia showed outperformance rates and rose in the ranks (Table 1). Among them are ROCHE (+48%) and JOHNSON & JOHNSON, which topped the top ten ranking (2.7-fold growth in purchases). Due to a 2% decrease in purchases, the former leader MSD moved down to rank three, also displacing BIOCAD (+12%) down one rank. PFIZER (+79%) moved up to rank five from nine, and the newcomers R-PHARM (12.6-fold growth in purchases), NOVARTIS (+28%) and BAYER (+46%) broke into the top ten ranking, coming in at numbers seven through nine respectively. PHARMASYNTEZ (-39%), which moved down from rank four, rounded out the top ten ranking. And only BRISTOL MYERS (+29%) held its previous rank six. In total, the top ten manufacturers accounted for 50.4% of the public segment against 41.9% in a year earlier period, according to the results for January-June 2021.

Table 1. The top 10 brands by public procurement segment volume

Rank in the top ten		Manufacturer*	Share in total public segment, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	2	ROCHE	8.0	6.4
2	8	JOHNSON & JOHNSON	7.6	3.4
3	1	MSD	6.5	7.8
4	3	BIOCAD RF	5.9	6.2
5	9	PFIZER	5.0	3.3
6	6	BRISTOL MYERS SQU	4.6	4.2
7	41	R-PHARM ZAO RF	4.5	0.4
8	11	NOVARTIS	2.9	2.7
9	12	BAYER	2.7	2.2
10	4	PHARMASYNTEZ	2.7	5.2
Total			50.4	41.9

*AIPM members are in bold

In the top 10 brands ranking, the position of KADCYLA (+38%), which still held its previous rank eighth, remained unchanged (Table 2). Five INNs from the top ten ranking rose in the ranks. Thus, SPINRAZA, which showed a 13-fold increase in purchases and broke into the top ten for the first time, moved up to rank one from 30, and KEYTRUDA (+41%) moved up to rank two from three. Another two newcomers ARTLEGIA (107-fold growth) and CORONAVIR moved up to ranks four and ten. PREVENAR 13 (2.5-fold growth in purchases) moved up from rank ten to five. At the same time, OPDIVO (+36%) and PERJETA (+5%) lost one rank each, AVEGRA brand (+2%) moved down from rank four to six, and TIVICAY (-53%), which showed negative growth rates, moved down to rank nine from one. The total share of the top 10 brands in the public segment expanded from 17.9% to 26.3%.

Table 2. The top 10 brands by public segment volume

Rank in the top ten		Brand	Share in total public segment, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	30	SPINRAZA	5.0	0.5
2	3	KEYTRUDA	3.8	3.2
3	2	OPDIVO	3.7	3.2
4	43	ARTLEGIA	2.7	0.0
5	10	PREVENAR 13	2.5	1.2
6	4	AVEGRA BIOCAD	2.1	2.4
7	6	PERJETA	1.7	1.9
8	8	KADCYLA	1.7	1.5

Rank in the top ten		Brand	Share in total public segment, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
9	1	TIVICAY	1.6	4.0
10	N/A	CORONAVIR	1.5	N/A
Total			26.3	17.9

Following the respective brand, NUSINERSEN took the lead in the top ten INNs and grouping names ranking (13-fold growth in purchases), becoming one of four newcomers (Table 3). Another three newcomers OLOKIZUMAB (107-fold growth in purchases), FAVIPRAVIR (51-fold growth) and VACCINE, PNEUMOCOCCAL CONJUGATE (2.4-fold growth) broke into the top ten ranking, moving up to ranks four through six, respectively. Apart from the leader, another three INNs developed their markets by outstripping rates. PEMBROLIZUMAB (+57%) and NIVOLUMAB (+36%) swapped their places: the former moved up to rank two, displacing NIVOLUMAB to rank three. TRASTUZUMAB (+38%) moved up one rank, to number nine. BEVACIZUMAB (+4%) and DOLUTEGRAVIR (-53%), which showed moderate and negative growth rates, moved down to rank seven and ten, while PERTUZUMAB (+5%) continued to hold rank eight. The total share accumulated by the top-ten INNs and grouping names increased from 18% to 27.6%.

Table 3. The top ten INNs and grouping names by public segment volume

Rank in the top ten		INNs/Grouping Names	Share in total public segment, %	
6 mon. 2021	6 mon. 2020		6 mon. 2021	6 mon. 2020
1	35	NUSINERSEN	5.0	0.5
2	3	PEMBROLIZUMAB	3.8	3.2
3	2	NIVOLUMAB	3.7	3.2
4	46	OLOKIZUMAB	2.7	0.0
5	45	FAVIPRAVIR	2.7	0.1
6	11	VACCINE, PNEUMOCOCCAL CONJUGATE	2.5	1.2
7	4	BEVACIZUMAB	2.2	2.5
8	8	PERTUZUMAB	1.7	1.9
9	10	TRASTUZUMAB EMTANSINE	1.7	1.5
10	1	DOLUTEGRAVIR	1.6	4.0
Total			27.6	18.0

Three ATC groups held their own in the top ten ATC groups ranking (Table 4). Among them were the ATC groups in the upper part of the top ten L01 Antineoplastic agents (+10%) and J05 Antivirals for systemic use (-17%). B01 Antithrombotic agents held and reinforced its previous rank six due to 2.5-fold growth in purchases. The markets of the groups L04 Immunosuppressants (3.4-fold growth in purchases) and M09 Other drugs for disorders of the musculoskeletal system (16-fold growth) also developed at a fast pace, which allowed them to move up to ranks three and four, respectively. On top of that, the latter became the only newcomer of the top 10 ranking. The remaining five groups, on the contrary, fell in the ranks. Despite the outperforming growth rates, J01 Antibacterials for systemic use (+21%) and L02 Endocrine therapy (+19%), as well as J04 Antimycobacterials, which reduced purchases by 16%, lost one rank each. J07 Vaccines (-13%) and B05 Blood substitutes and perfusion solutions (-11%) moved down to ranks seven and eight from three and five. In total, the top ten ATC groups accumulated 83.6% of the public segment, whereas in the year-earlier period they accounted for 80.1%.

Table 4. The top 10 ATC groups by public segment volume

Rank in the top ten		ATC code	ATC group	Share in total public segment, %	
6 mon. 2021	6 mon. 2020			6 mon. 2021	6 mon. 2020
1	1	L01	ANTINEOPLASTIC AGENTS	31.0	33.2
2	2	J05	ANTIVIRALS FOR SYSTEMIC USE	12.9	18.3
3	7	L04	IMMUNOSUPPRESSANTS	7.2	2.5
4	22	M09	OTHER DRUGS FOR DISORD. OF THE MUSCULO-SKELET. SYST	6.8	0.5
5	4	J01	ANTIBACTERIALS FOR SYST USE	6.7	6.6
6	6	B01	ANTITHROMBOTIC AGENTS	6.6	3.1
7	3	J07	VACCINES	5.6	7.6
8	5	B05	PLASMA SUBSTITUTES AND PERFUSION SOLUTIONS	2.9	3.9
9	8	L02	ENDOCRINE THERAPY	2.4	2.4
10	9	J04	ANTIMYCOBACTERIALS	1.5	2.0
Total				83.6	80.1

Conclusion. Based on the results for January-June of 2021, the Russian public segment continued to demonstrate positive growth rates both in rouble terms (+18%) and in dollar terms (+12%). Its volume amounted to RUB 165.602 bil. (USD 2.231 bil.). In pack terms, the market reduced by 23% and amounted to 192.110 mil. packs. At the end of the first six months of 2021, the average cost of a finished pharma product (FPP) pack in the public segment amounted to USD 11.61 vs. USD 8.04 in the year earlier period.

PHARMACEUTICAL MARKET OF THE CENTRAL FEDERAL DISTRICT (CFD) IN 1-2 Q 2021 KEY PERFORMANCE INDICATORS

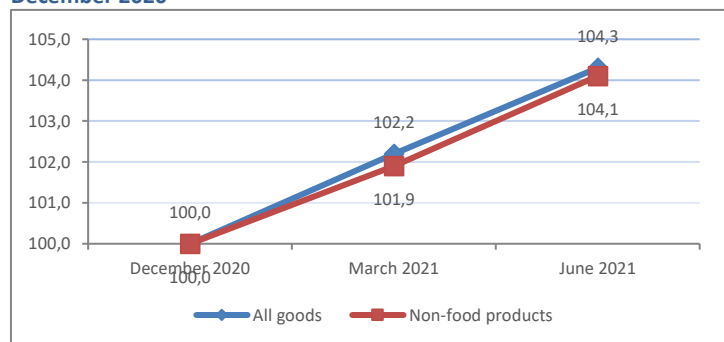
Macroeconomic indices

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

Value	June-January 2021	June-January 2021 (%) as % against June-January 2020
Industrial production index		118.0
Retail turnover, RUB bil.	6,445.1	112.8
Monthly average accrued wage per worker (nominal), RUB	69,731	110.4
real		104.4

Note: CFD TOGS data

Figure 1. Movement of price index and non-food product price index vs December 2020



Indicators of movement of prices and retail margins (based on the results of IQVIA data)

Figure 1. Dynamics of weighted average prices and retail margins in 1-2 Q 2020 – 1-2 Q 2021

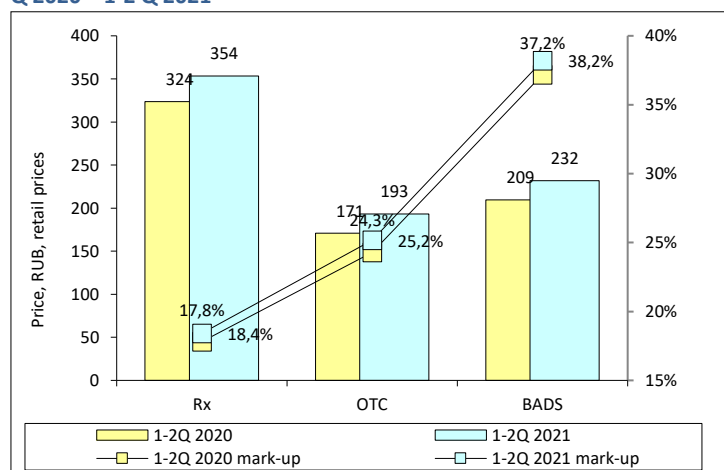
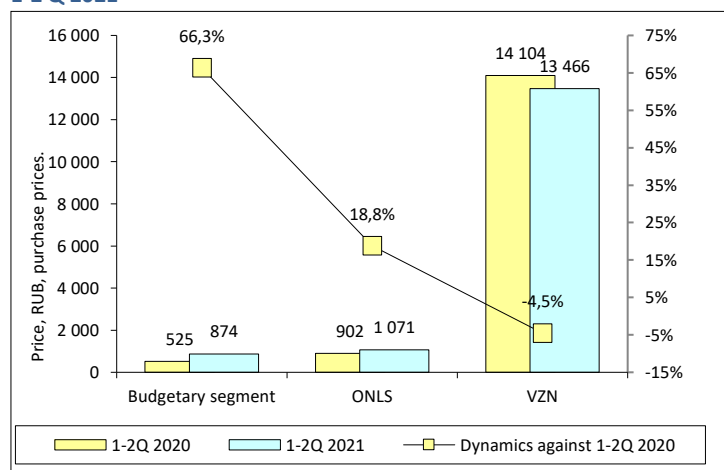


Figure 2. Dynamics of weighted average purchase prices in 1-2 Q 2020 – 1-2 Q 2021



Indicators of movement and structure of the market² (based on the results of IQVIA data)

Figure 3. CFD pharmaceutical market in Q 1-2, 2020 – 1-2 Q 2021

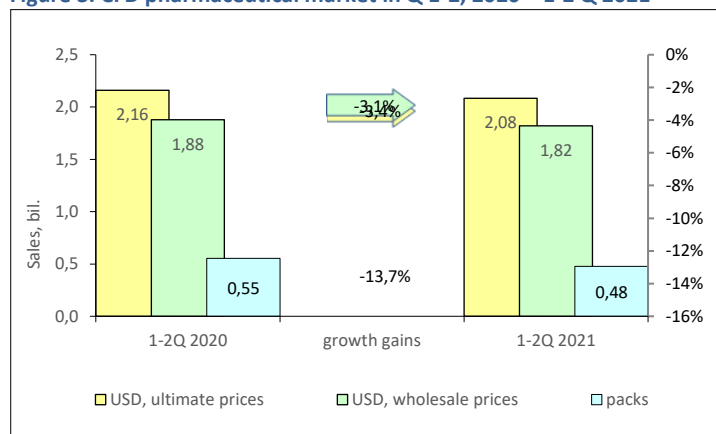


Figure 4. Structure of CFD pharmaceutical market by major segments in Q 1-2 2020 – 1-2 Q 2021

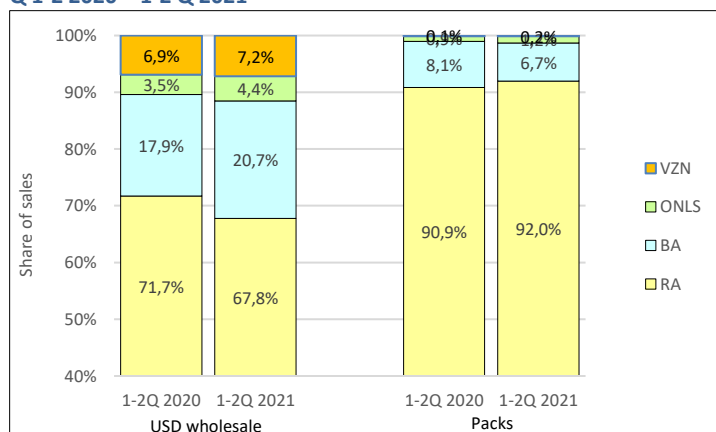


Figure 5. Structure of the retail segment of CFD market in Q 1-2 2020 – 1-2 Q 2021

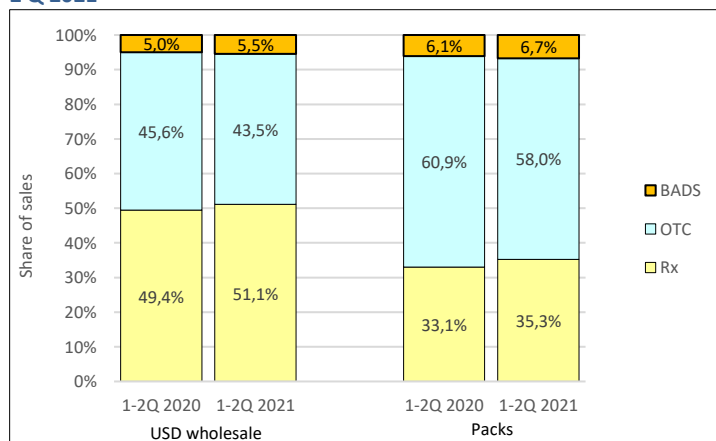
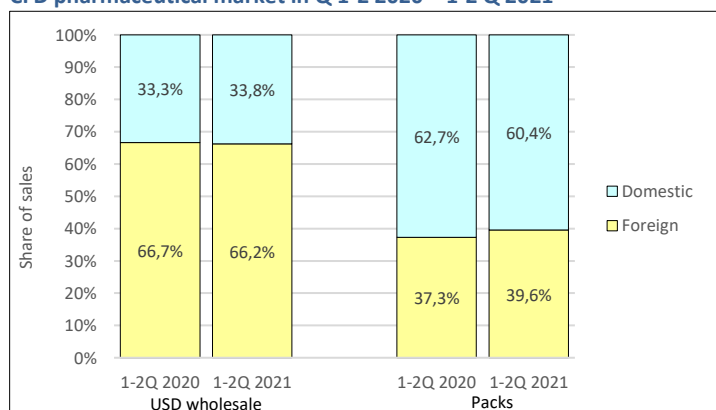


Figure 6. Dynamics of the Russian/ foreign drugs share in the structure of CFD pharmaceutical market in Q 1-2 2020 – 1-2 Q 2021



² Exclusive of Moscow

PHARMACEUTICAL MARKET OF THE NORTH-WESTERN FEDERAL DISTRICT (NWFD) IN 1-2 Q 2021 KEY PERFORMANCE INDICATORS

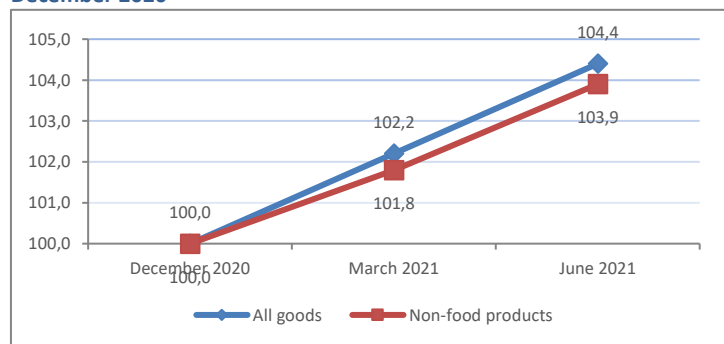
Macroeconomic indices

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

Value	June-January 2021	June-January 2021 (%) as % against June-January 2020
Industrial production index		103.5
Retail turnover, RUB bil.	1,869.0	111.9
Monthly average accrued wage per worker (nominal), RUB	61,092	109.6
real		103.8

Note: NWFD TOGS data

Figure 1. Movement of price index and non-food product price index vs December 2020



Indicators of movement of prices and retail margins (based on the results of IQVIA data)

Figure 1. Dynamics of weighted average prices and retail margins in 1-2 Q 2020 – 1-2 Q 2021

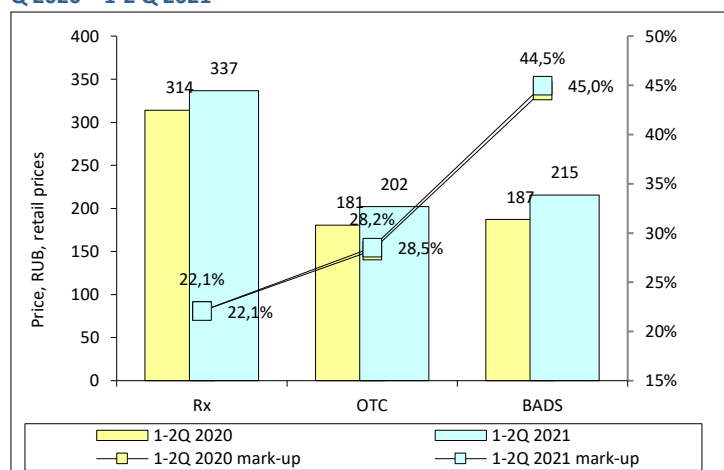
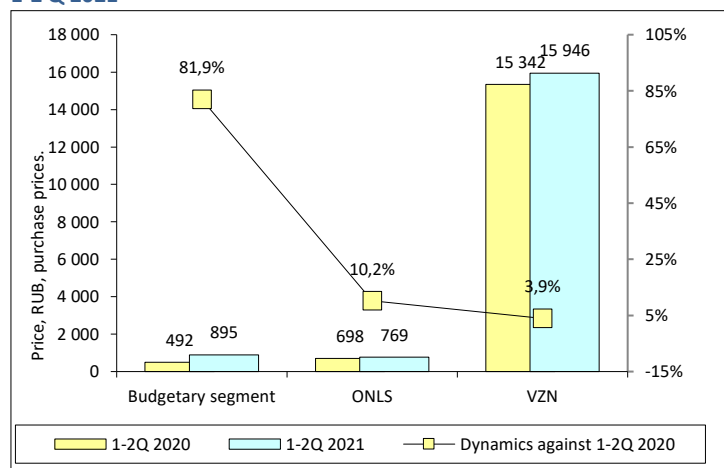


Figure 2. Dynamics of weighted average purchase prices in 1-2 Q 2020 – 1-2 Q 2021



Indicators of movement and structure of the market³ (based on the results of IQVIA data)

Figure 3. NWFD pharmaceutical market in Q 1-2, 2020 – 1-2 Q 2021

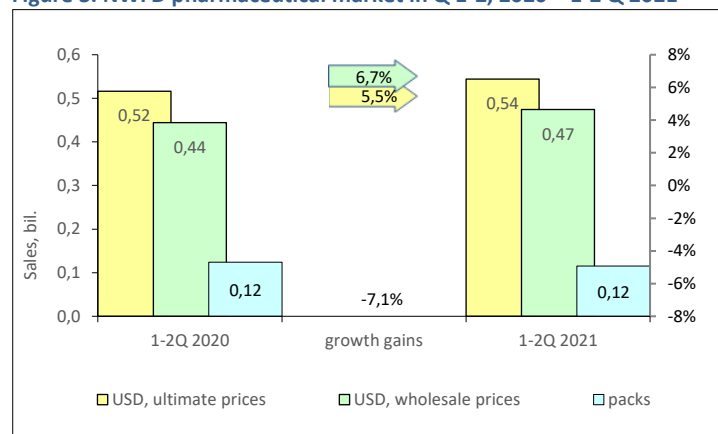


Figure 4. Structure of NWFD pharmaceutical market by major segments in Q 1-2, 2020 – 1-2 Q 2021

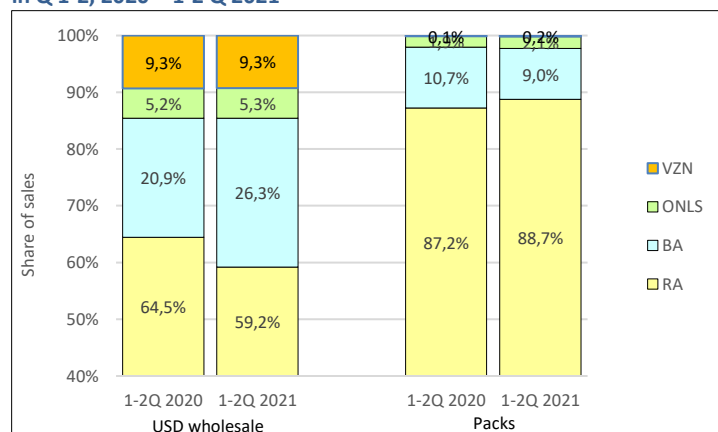


Figure 5. Structure of the retail segment of NWFD market in Q 1-2, 2020 – 1-2 Q 2021

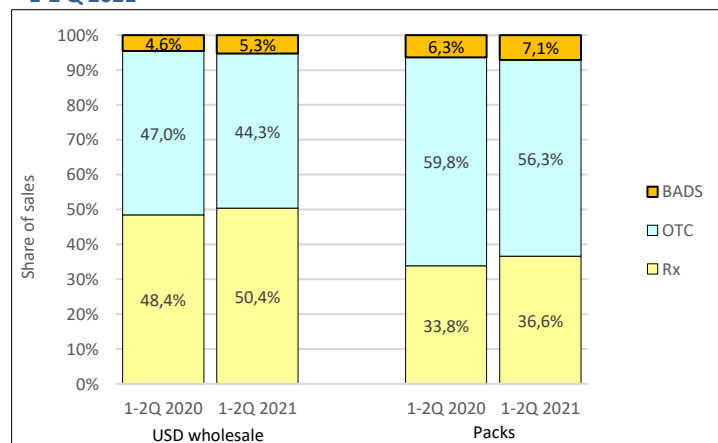
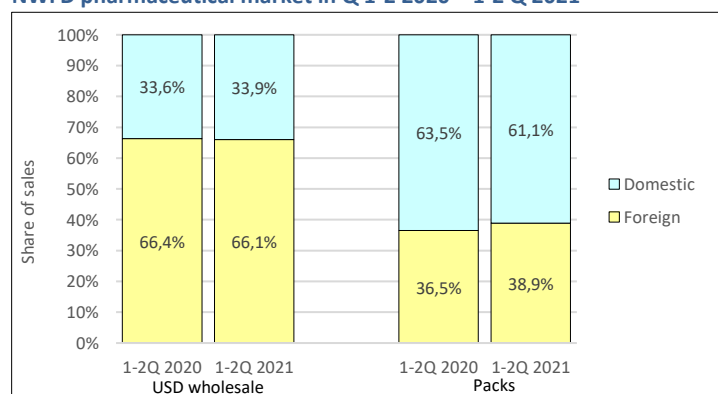


Figure 6. Dynamics of the Russian/ foreign drugs share in the structure of NWFD pharmaceutical market in Q 1-2 2020 – 1-2 Q 2021



³ Exclusive of St. Petersburg

PHARMACEUTICAL MARKET OF THE VOLGA FEDERAL DISTRICT (VFD) IN 1-2 Q 2021 KEY PERFORMANCE INDICATORS

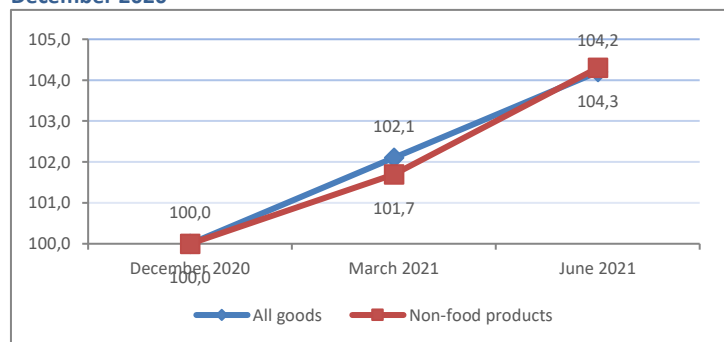
Macroeconomic indices

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

Value	June-January 2021	June-January 2021 (%) as % against June-January 2020
Industrial production index		105.9
Retail turnover, RUB bil.	3,059.6	107.5
Monthly average accrued wage per worker (nominal), RUB	39,010	108.9
real		102.7

Note: VFD TOGS data

Figure 1. Movement of price index and non-food product price index vs December 2020



Indicators of movement of prices and retail margins (based on the results of IQVIA data)

Figure 1. Dynamics of weighted average prices and retail margins in 1-2 Q 2020 – 1-2 Q 2021

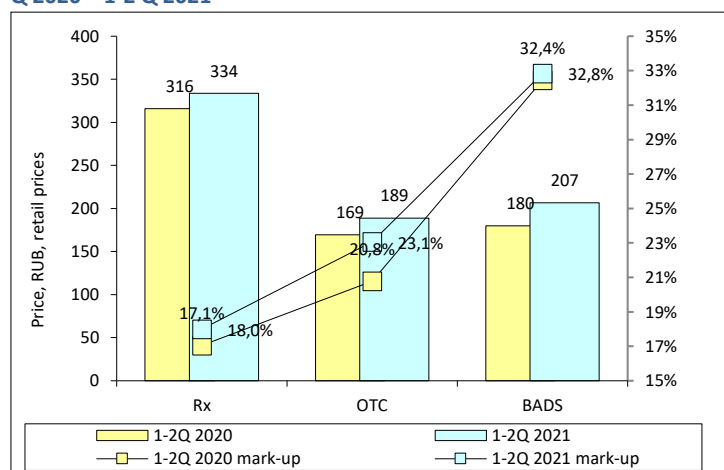
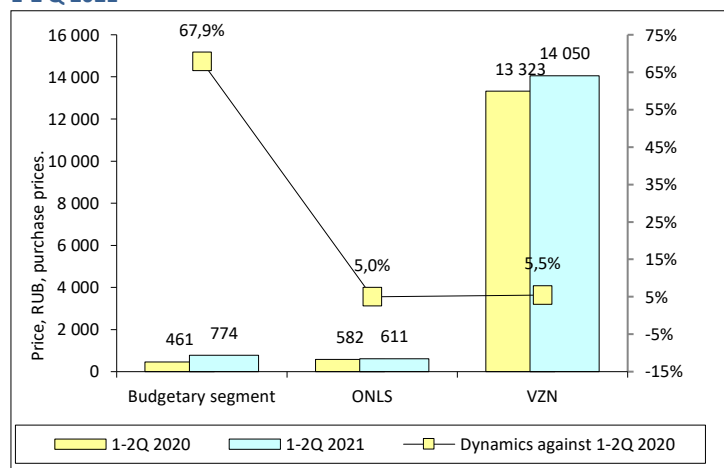


Figure 2. Dynamics of weighted average purchase prices in 1-2 Q 2020 – 1-2 Q 2021



Indicators of movement and structure of the market (based on the IQVIA data)

Figure 3. VFD pharmaceutical market in Q 1-2, 2020 – 1-2 Q 2021

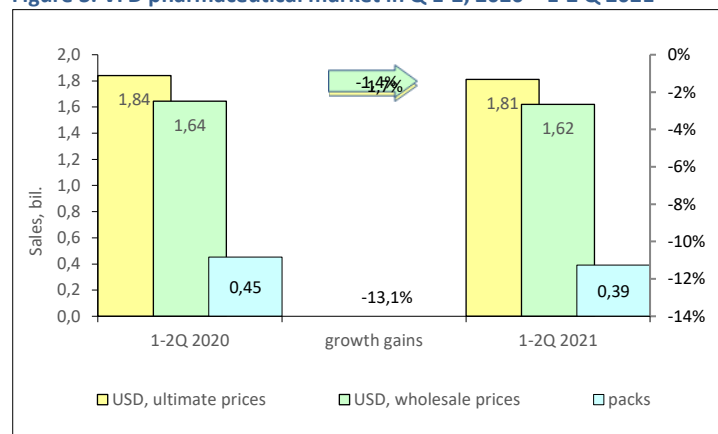


Figure 4. Structure of PFD pharmaceutical market by major segments in Q 1-2, 2020 – 1-2 Q 2021

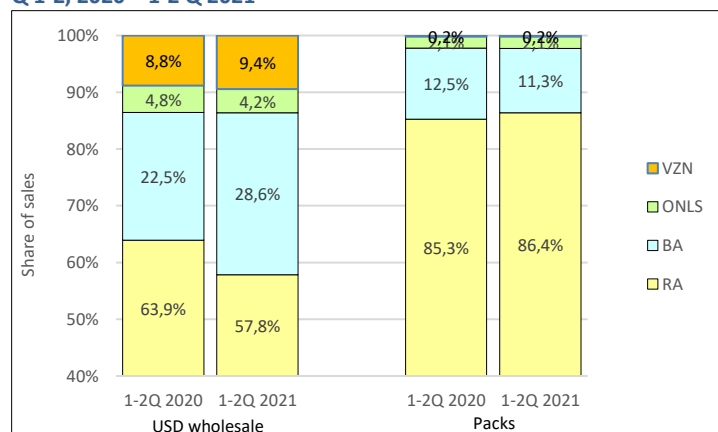


Figure 5. Structure of the retail segment of VFD market in Q 1-2, 2020 – 1-2 Q 2021

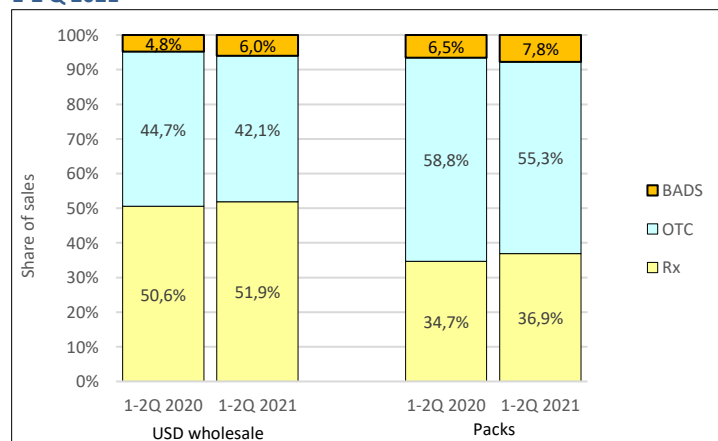
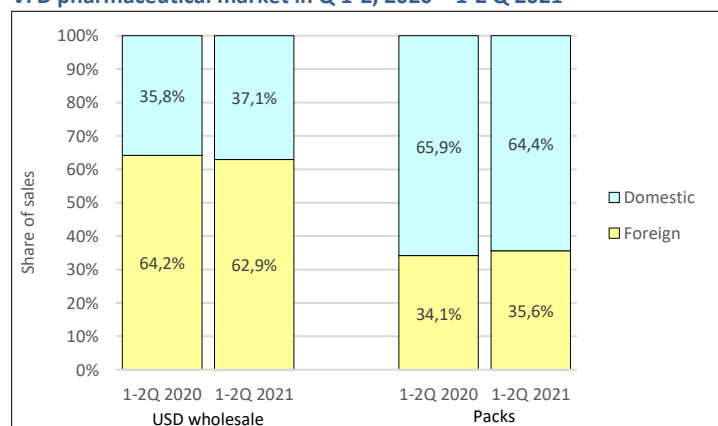


Figure 6. Dynamics of the Russian/foreign drugs share in the structure of VFD pharmaceutical market in Q 1-2, 2020 – 1-2 Q 2021



PHARMACEUTICAL MARKET OF THE URAL FEDERAL DISTRICT (UFD) IN 1-2 2021 KEY PERFORMANCE INDICATORS

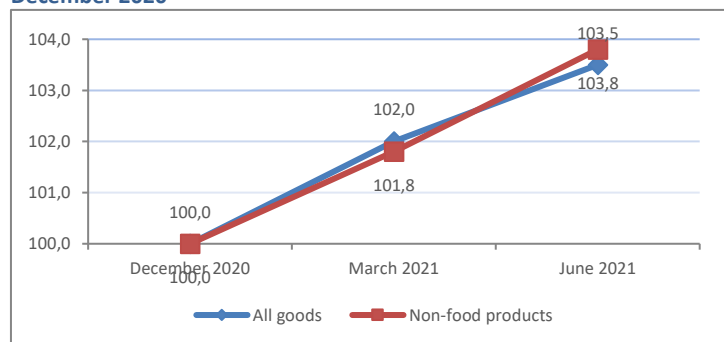
Macroeconomic indices

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

Value	June-January 2021	June-January 2021 (%) as % against June-January 2020
Industrial production index		104.3
Retail turnover, RUB bil.	1,484.6	104.6
Monthly average accrued wage per worker (nominal), RUB	58,578	107.5
real		102.2

Note: VFD TOGS data

Figure 1. Movement of price index and non-food product price index vs December 2020



Indicators of movement of prices and retail margins (based on the results of IQVIA data)

Figure 1. Dynamics of weighted average prices and retail margins in 1-2 Q 2020 – 1-2 Q 2021

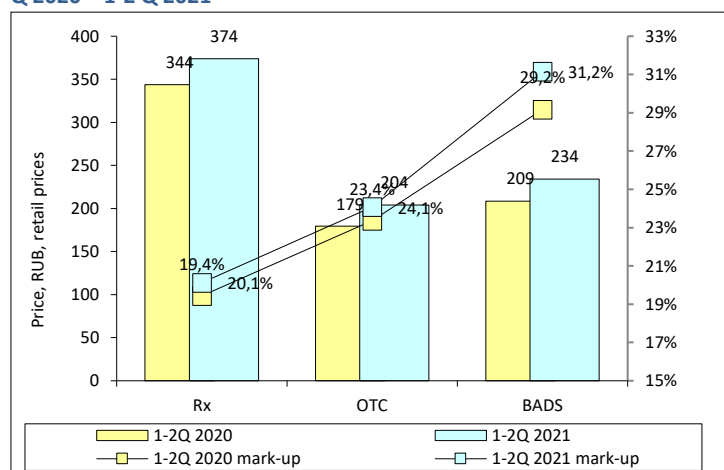
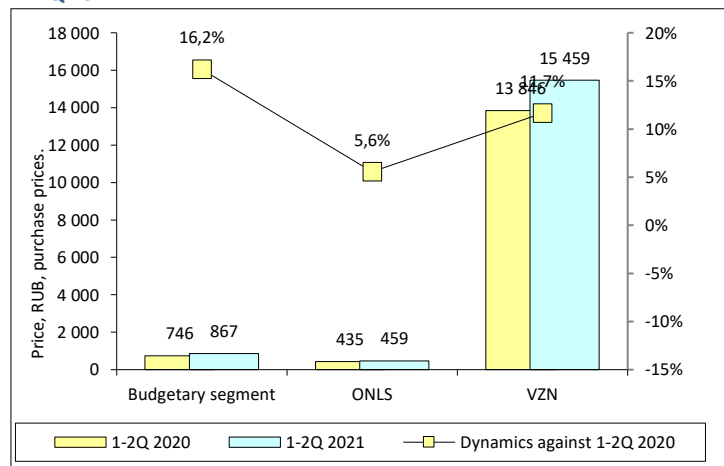


Figure 2. Dynamics of weighted average purchase prices in 1-2 Q 2020 – 1-2 Q 2021



Indicators of movement and structure of the market (based on the IQVIA data)

Figure 3. UrFD pharmaceutical market in Q 1-2, 2020 – 1-2 Q 2021

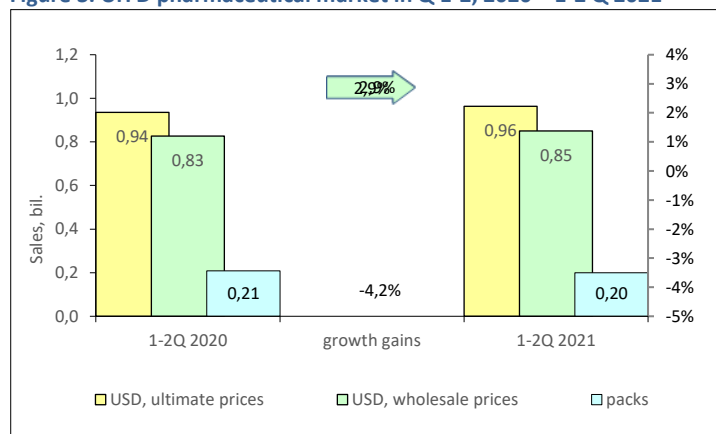


Figure 4. Structure of UrFD pharmaceutical market by major segments in Q 1-2, 2020 – 1-2 Q 2021

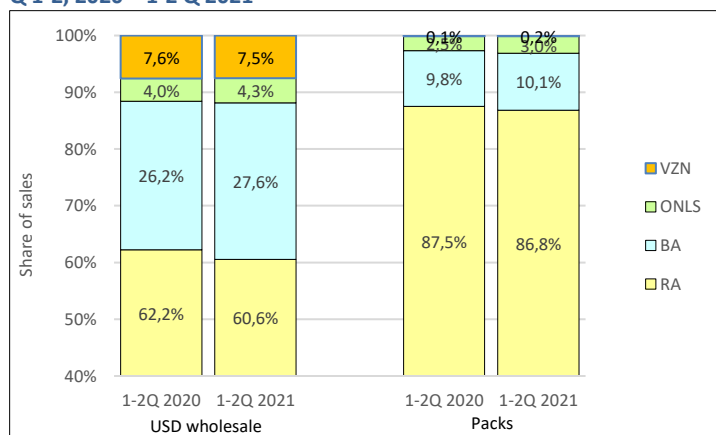


Figure 5. Structure of the retail segment of UrFD market in Q 1-2 2020 – 1-2 Q 2021

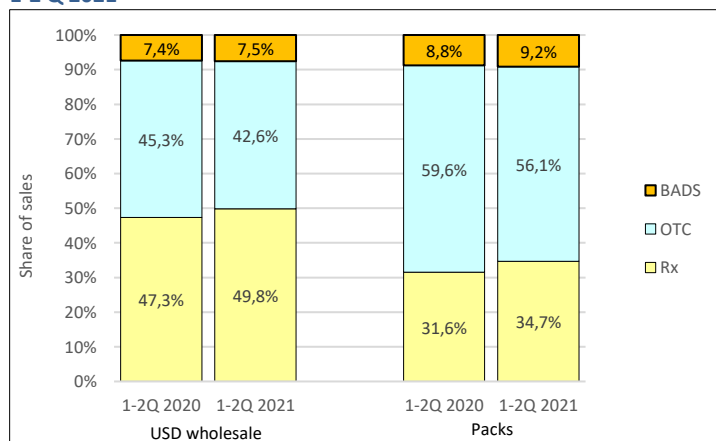
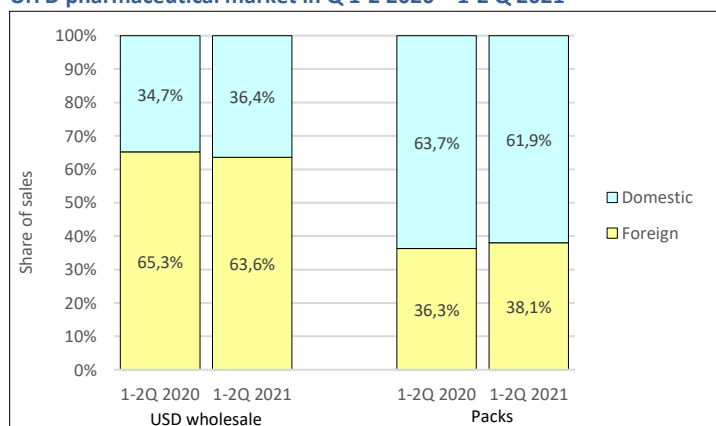


Figure 6. Dynamics of the Russian/ foreign drugs share in the structure of UrFD pharmaceutical market in Q 1-2 2020 – 1-2 Q 2021



PHARMACEUTICAL MARKET OF THE SIBERIAN FEDERAL DISTRICT (SFD) IN 1-2 2021 KEY PERFORMANCE INDICATORS

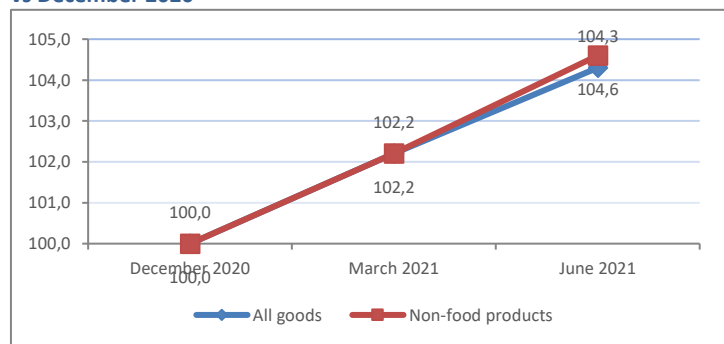
Macroeconomic indices

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

Value	June-January 2021	June-January 2021 (%) as % against June-January 2020
Industrial production index		99.4
Retail turnover, RUB bil.	1,549.4	105.4
Monthly average accrued wage per worker (nominal), RUB	46,848	108.5
real		102.6

Note: SiFD TOGS data

Figure 1. Movement of the price index and non-food product price index vs December 2020



Indicators of movement of prices and retail margins (based on the results of IQVIA data)

Figure 1. Dynamics of weighted average prices and retail margins in 1-2 Q 2020 – 1-2 Q 2021

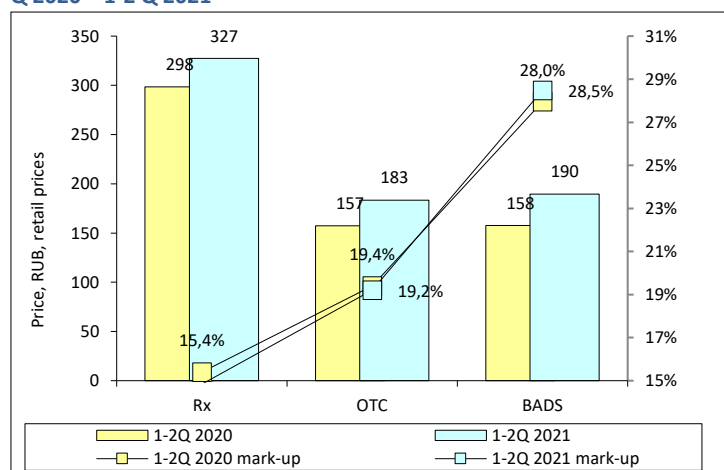
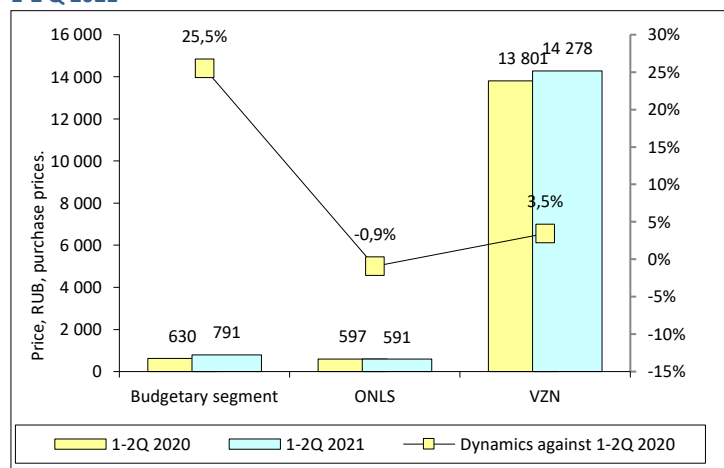


Figure 2. Dynamics of weighted average purchase prices in 1-2 Q 2020 – 1-2 Q 2021



Indicators of movement and structure of the market (based on the IQVIA data)

Figure 3. SFD pharmaceutical market in 1-2 Q 2020 – 1-2 Q 2021

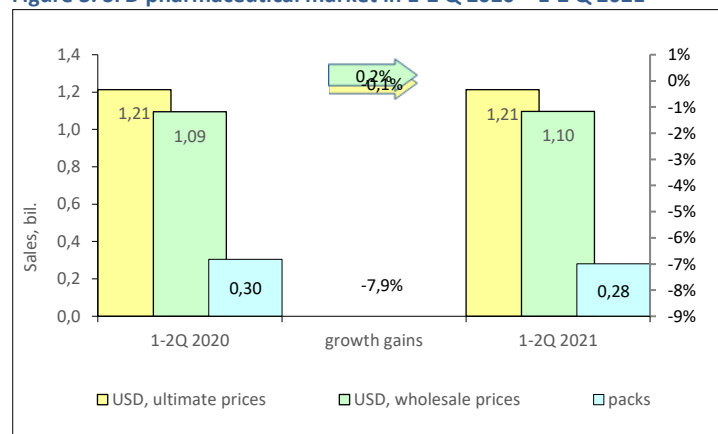


Figure 4. Structure of SiFD pharmaceutical market by major segments in Q 1-2, 2020 – 1-2 Q 2021

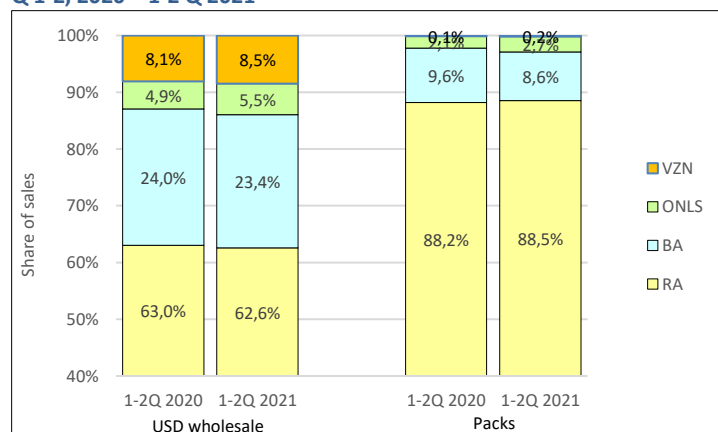


Figure 5. Structure of the retail segment of SiFD market in 1-2 Q 2020 – 1-2 Q 2021

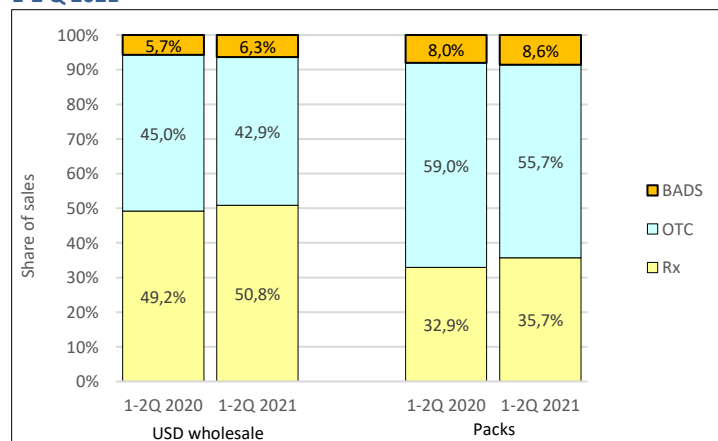
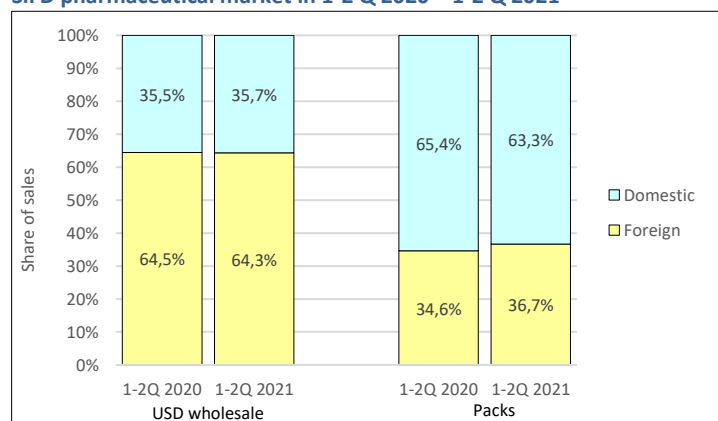


Figure 6. Dynamics of the Russian/ foreign drugs share in the structure of SiFD pharmaceutical market in 1-2 Q 2020 – 1-2 Q 2021



PHARMACEUTICAL MARKET OF THE SOUTHERN FEDERAL DISTRICT (SoFD) IN 1-2 Q 2021 KEY PERFORMANCE INDICATORS

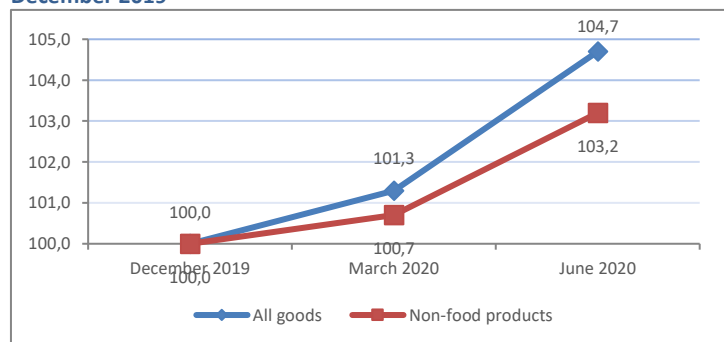
Macroeconomic indices

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

Value	June-January 2021	June-January 2021 (%) as % against June-January 2020
Industrial production index		105.4
Retail turnover, RUB bil.	1,893.8	16.3
Monthly average accrued wage per worker (nominal), RUB	38,386	108.5
real		102.2

Note: SoFD TOGS data

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



Indicators of movement of prices and retail margins (based on the results of IQVIA data)

Figure 1. Dynamics of weighted average prices and retail margins in 1-2 Q 2020 – 1-2 Q 2021

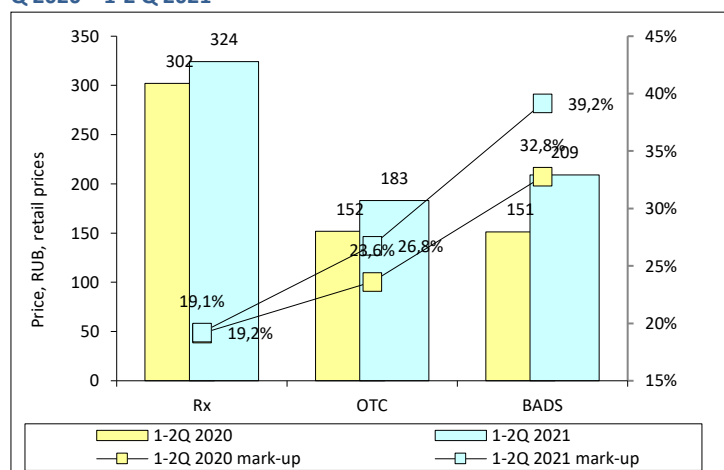
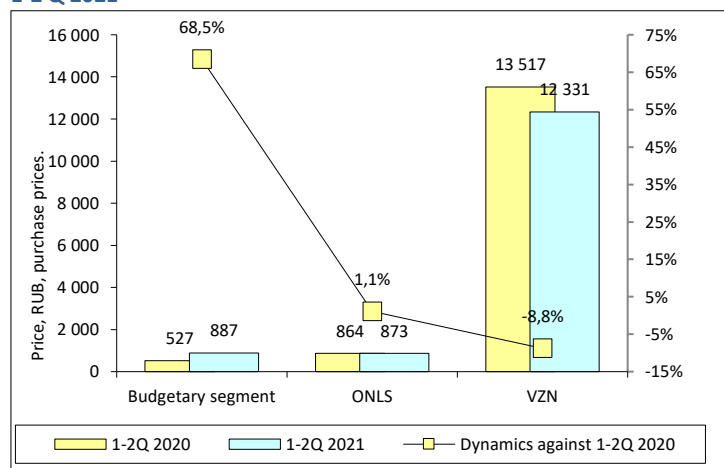


Figure 2. Dynamics of weighted average purchase prices in 1-2 Q 2020 – 1-2 Q 2021



Indicators of movement and structure of the market (based on the IQVIA data)

Figure 3. SoFD pharmaceutical market in 1-2 Q 2020 – 1-2 Q 2021

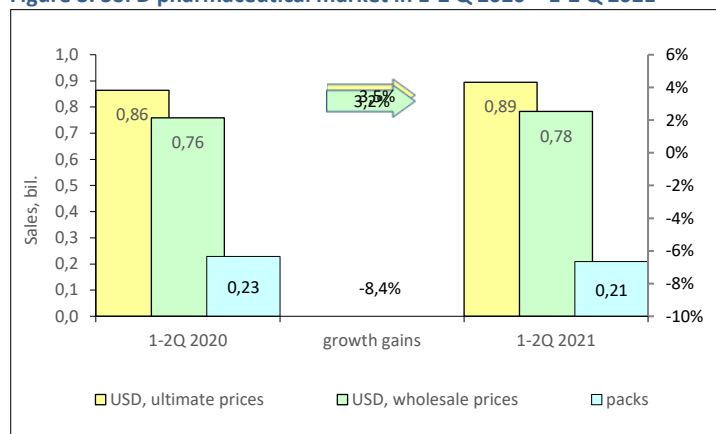


Figure 4. Structure of SoFD pharmaceutical market by major segments in 1-2 Q 2020 – 1-2 Q 2021

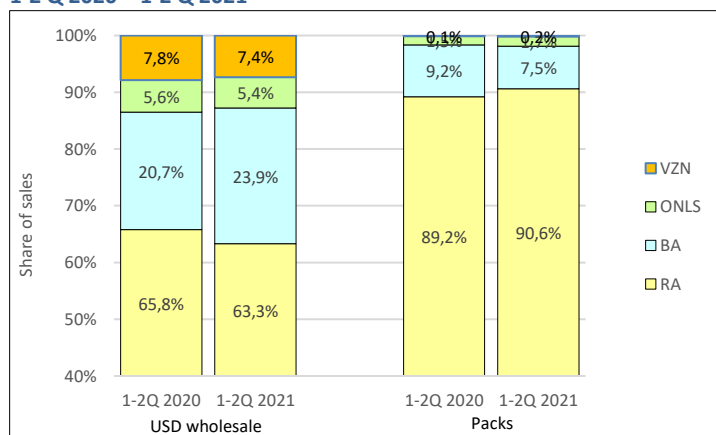


Figure 5. Structure of the retail segment of SoFD pharmaceutical market in 1-2 Q 2020 – 1-2 Q 2021

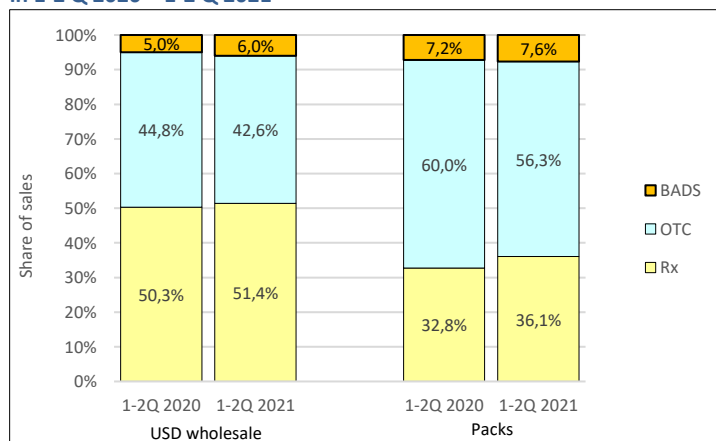
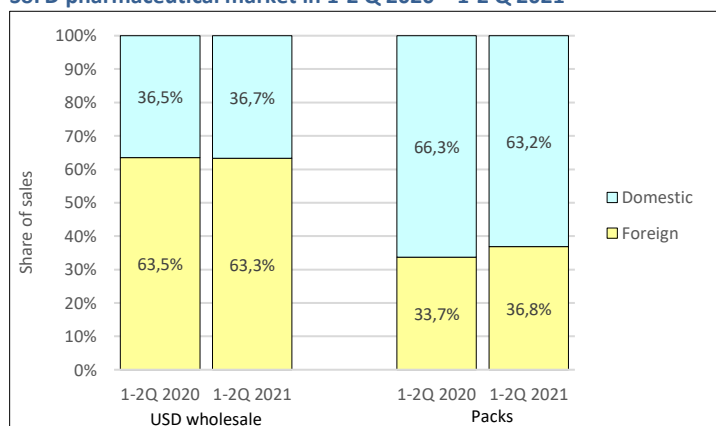


Figure 6. Dynamics of the Russian/ foreign drugs share in the structure of SoFD pharmaceutical market in 1-2 Q 2020 – 1-2 Q 2021



PHARMACEUTICAL MARKET OF THE FAR EASTERN FEDERAL DISTRICT (FEFD) IN 1-2 Q 2021 KEY PERFORMANCE INDICATORS

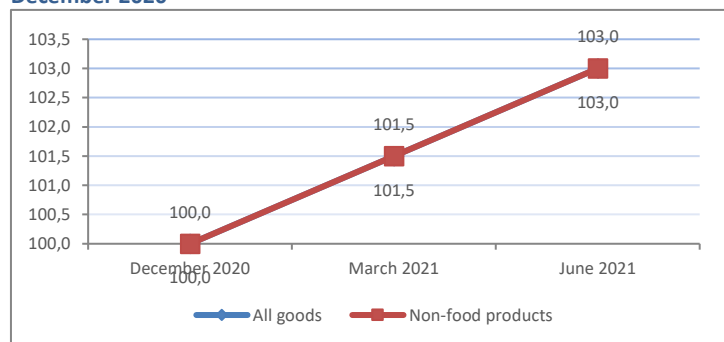
Macroeconomic indices

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

Value	June-January 2021	June-January 2021 (%) as % against June-January 2020
Industrial production index		103.9
Retail turnover, RUB bil.	997.8	109.9
Monthly average accrued wage per worker (nominal), RUB	63,330	108.0
real		102.6

Note: FEFD TOGS data

Figure 1. Movement of price index and non-food product price index vs December 2020



Indicators of movement of prices and retail margins (based on the results of IQVIA data)

Figure 1. Dynamics of weighted average prices and retail margins in 1-2 Q 2020 – 1-2 Q 2021

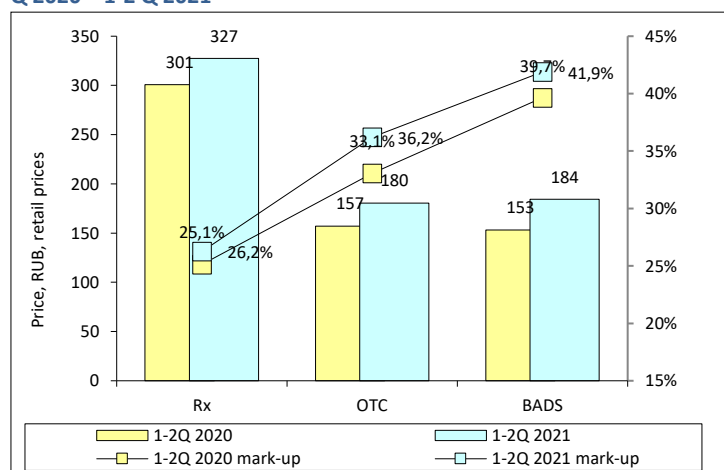
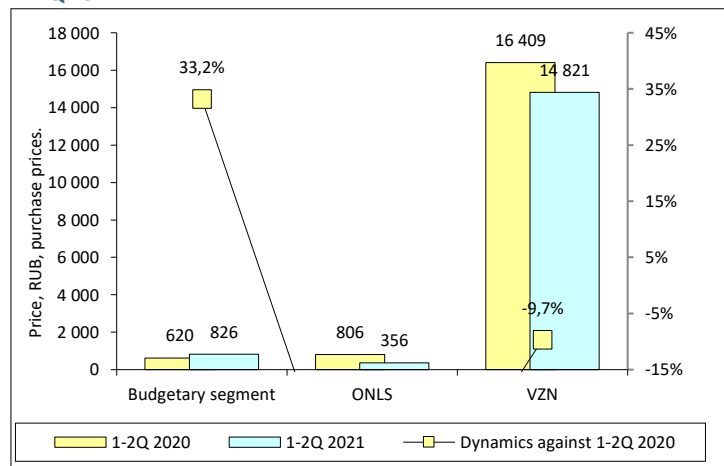


Figure 2. Dynamics of weighted average purchase prices in 1-2 Q 2020 – 1-2 Q 2021



Indicators of movement and structure of the market (based on the IQVIA data)

Figure 3. FEFD pharmaceutical market in 1-2 Q 2020 – 1-2 Q 2021

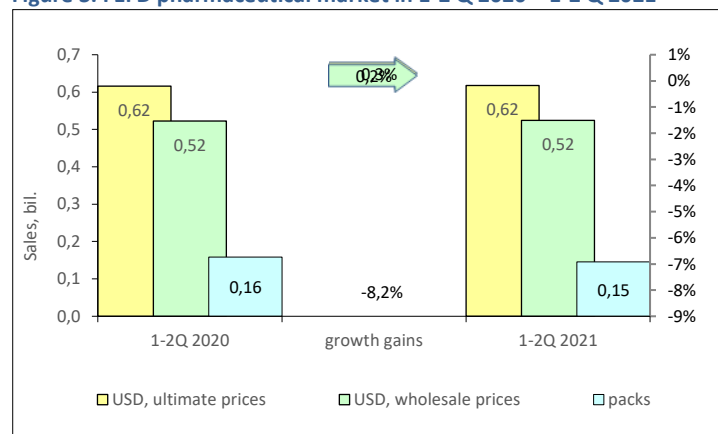


Figure 4. Structure of FEFD pharmaceutical market by major segments in 1-2 Q 2020 – 1-2 Q 2021

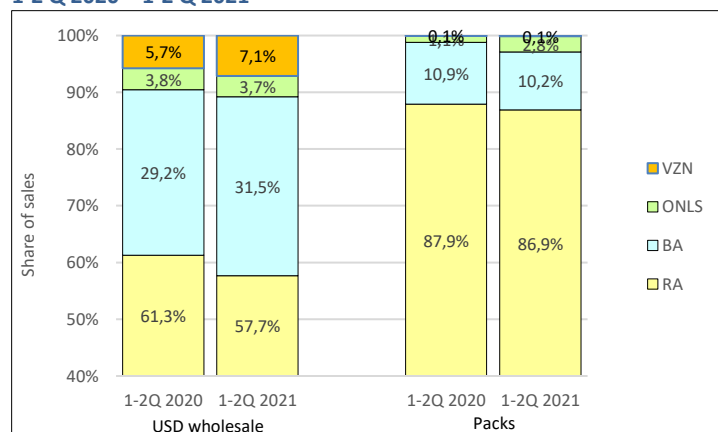


Figure 5. Structure of the retail segment of FEFD pharmaceutical market in 1-2 Q 2020 – 1-2 Q 2021

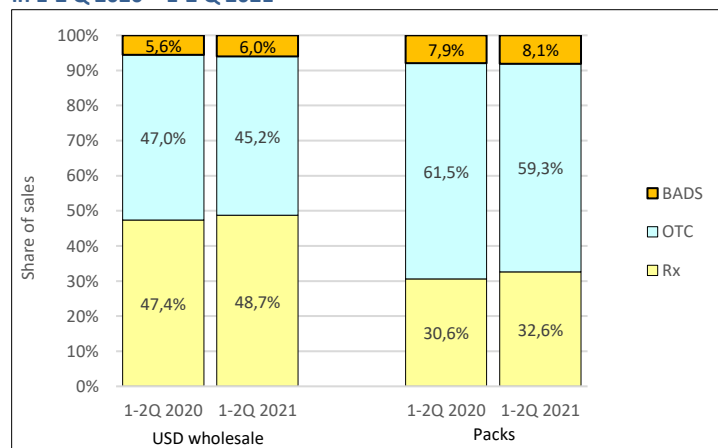


Figure 6. Dynamics of the Russian/ foreign drugs share in the structure of FEFD pharmaceutical market in 1-2 Q 2020 – 1-2 Q 2021

