

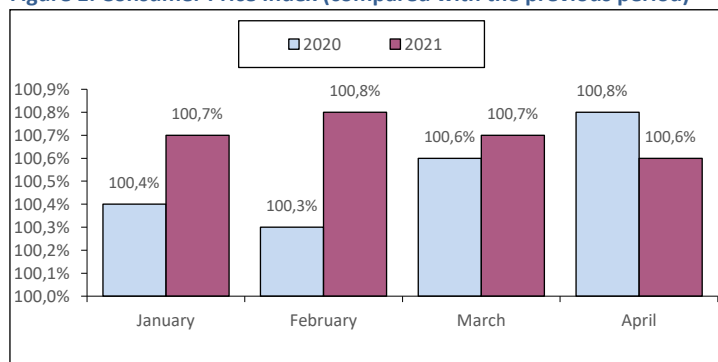
MACROECONOMIC INDICES

Inflation

According to the Federal State Statistics Service (Rosstat), the Consumer Price Index was estimated at 100.6% in April 2021, as compared to the previous month, 102.7% as compared to December 2020.

In April 2021, Industrial Producer Price Index was 102.7% as compared to the previous month, in the month-earlier period it had amounted to 103.5%. The index accounted for 113.8% against December 2020.

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



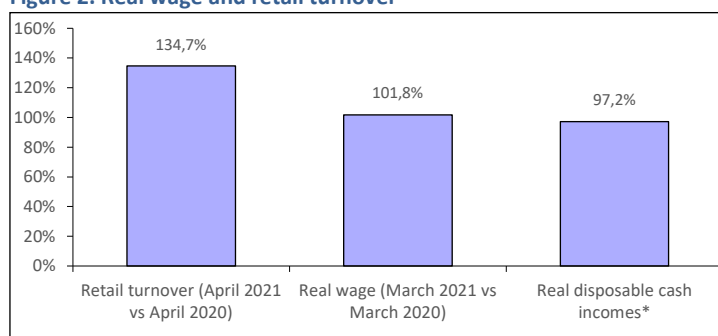
Living standard

In March of 2021, a gross monthly average wage of corporate employees reached RUB 55208 (USD 741.94). It accounted for 107.7% compared to March 2020, and 107.8% compared to the previous period. In March of 2021, the real gross wage accounted for 101.8% as compared to March of 2020, and 107.1% against the prior period. According to estimates¹, real disposable cash incomes decreased by 2.8% in the first half of 2021 as compared to the first half of 2020 (Fig. 2).

Retail turnover

In April 2021, the retail turnover was equal to RUB 3080.8 bil. or 134.7% (in comparable prices) against the respective period of the previous year, and RUB 11726.8 bil. or 105.9% in January - April 2021 (Fig. 2).

Figure 2. Real wage and retail turnover



* Quarter I 2021 vs Quarter I 2020

Industrial Production

According to Federal State Statistics Service's data, Industrial Production Index accounted for 107.2% in April of 2021 as compared to the same period in the previous year, and 101.1% in January-April of 2021.

According to Federal State Statistics Service's data, Industrial Production Index for drugs and medical products in April 2021 accounted for 100.6% compared to the same period in 2020, and 129.4% in January-April vs January-April 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 April of 2021.

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

Rank	Manufacturer	RUB mil.
1	Otcpharm	2417.4
2	Biocad	2382.7
3	Stada	2139.5
4	Pharmstandard	1844.2
5	Binnopharm	1477.4
6	Grotex	1197.3
7	Pharmasyntez	1139.0
8	Sotex	1120.0
9	Vertex	1053.6
10	Valenta	1051.0

Source - Remedium according to IQVIA data

Table 2 provides pharmacy sales data from 10 regions of the Russian Federation. In March 2021 compared to the previous month, sales (in roubles equivalent) increased in all regions. The most pronounced growth in sales was observed in St. Petersburg (+44%), the least one in Tatarstan and Perm (+12% each).

Table 2. Pharmacy sales in the regions, 2021

Region	Pharmacy sales, USD mil. (wholesale prices)			Growth gain, % (roubles)		
	January 2021	February 2021	March 2021	January 21/ December 20	February/January 21	March / February 21
Moscow	132.6	139.3	194.9	-38%	5%	40%
St. Petersburg	57.5	51.7	74.4	-39%	-10%	44%
Krasnodar Krai	36.3	34.8	48.2	-37%	-4%	39%
Krasnoyarsk Krai	20.7	21.6	26.7	-33%	4%	23%
Tatarstan	18.5	18.3	20.6	-27%	-1%	12%
Rostov Region	24.8	24.3	29.0	-29%	-2%	19%
Novosibirsk Region	20.3	20.2	23.4	-27%	-0.3%	16%
Voronezh Region	11.9	12.1	17.0	-31%	2%	40%
Perm	8.9	9.5	10.6	-19%	7%	12%
Iyumen	7.4	7.8	9.5	-26%	6%	23%

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 2021

Rank	Company*	Quantity of broad-casts
1	Otcpharm	12,069
2	Bayer	9,590
3	Sanofi	5,937
4	Berlin-Chemie/Menarini	5,707
5	Teva	5,370

Source - Remedium according to Mediascope's data

Table 4. Top five brand names in mass media in April, 2021

Rank	Brand*	Quantity of broad-casts
1	Nurofen	2,703
2	Pentalgin	2,502
3	Wobenzym	2,319
4	Acipol	1,985
5	Exoderil	1,931

Source - Remedium according to Mediascope's data

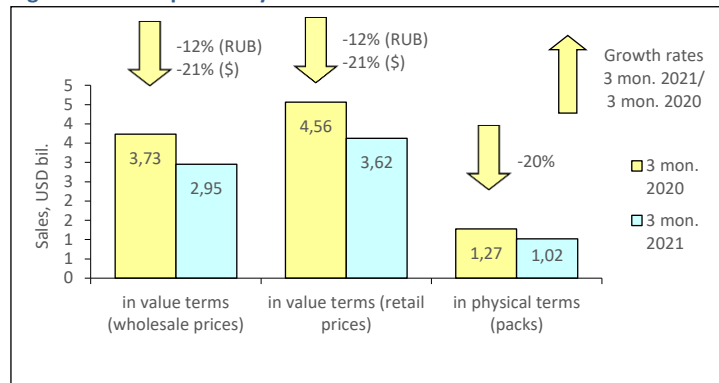
* Only drugs registered with National Medicine Register were considered.

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: FIRST THREE MONTHS RESULTS 2021

According to the results of the IQVIA Retail Audit of FPP (Finished Pharmaceutical Products) in Russian Federation™, at the end of the first three months of 2021 the sales of drugs in physical terms in the country saw a 20% decrease to 1.020 bil. packs as compared to the same period of 2020. In money terms, the market saw a 12% decrease in terms of roubles and 21% in terms of dollars. The volume of the market amounted to RUB 219.204 bil. (USD 2.950 bil.) at wholesale prices (Fig. 1). The average cost of an OTC pack at retail prices proved to be lower than the previous year figure: USD 3.55 in the first quarter of 2021 vs USD 3.58 in 2020. Consumer spending for drugs in Russia averaged to USD 24.78 in January-March of 2021, whereas during the same period a year ago it averaged to USD 31.10.

Figure 1. Russia pharmacy market for 3 months 2020 – 3 months 2021



According to the results for the first three months of 2021, almost all participants in the top 10 leading manufacturers reduced their sales (Table 1). BAYER, the leader of the ranking, which increased its sales by 1%² and expanded its market share, was the only exception. The remarkable thing is that in addition to it, OTCPHARM (-7%), ABBOTT and KRKA (-11% each), as well as BERLIN-CHEMIE/MENARINI (-9%) managed to increase their shares in the retail market. At the same time, they moved up to the second line and ranks seven through nine, and the latter became the only newcomer of the top 10 ranking. Despite a 13% decline in sales, TEVA also managed to move up to a higher rank five. STADA (-13%), which showed the same dynamics, held its previous rank four, while SANOFI (-17%) and SANDOZ (-28%) moved down to ranks three and ten. In total, the top ten ATC groups accumulated 34.3% of the Russian retail market, whereas in the year– earlier period it accounted for 34.1%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten	3 mon. 2021	3 mon. 2020	Manufacturer*	Share in total pharmacy sales, %	
				3 mon. 2021	3 mon. 2020
1	1		BAYER	5.1	4.4
2	3		OTCPHARM	3.9	3.7
3	2		SANOFI	3.8	4.0
4	4		STADA	3.6	3.7
5	7		TEVA	3.2	3.3
6	6		SERVIER	3.1	3.3
7	9		ABBOTT	3.0	2.9
8	10		KRKA	3.0	2.9
9	11		BERLIN-CHEMIE/MENARINI	2.9	2.8
10	5		SANDOZ	2.7	3.3
Total				34.3	34.1

*AIPM members are in bold

XARELTO (+31%) remained the best-selling brand in the regional market (Table 2). Another anticoagulant, ELIQUIS (+77%) moved up to rank two from twelve, while the antiviral drug ARBIDOL (+35%) moved up to rank three. Despite the decline in sales, DETRALEX (-5%) and MEXIDOL (-1%) were able to rise in the ranks from six to four and from nine to six. The newcomers HEPTRAL (+29%) and PENTALGIN (-5%) broke into the top ten rankings, moving up to the higher ranks, five and the last one. As before, CONCOR brand (-14%) held its previous rank seven. And only NUROFEN (-29%) and INGAVIRIN (-49%), which showed pronounced negative growth rates, moved down to the lower ranks eight and nine. The total share of the top 10 increased from 6.7% to 7.9%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten	3 mon. 2021	3 mon. 2020	Brand	Share in total pharmacy sales, %	
				3 mon. 2021	3 mon. 2020
1	1		XARELTO	1.5	1.0
2	12		ELIQUIS	1.0	0.5
3	5		ARBIDOL	1.0	0.7
4	6		DETRALEX	0.7	0.7
5	14		HEPTRAL	0.7	0.5
6	9		MEXIDOL	0.7	0.6
7	7		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. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
8	4	NUROFEN	0.6	0.8
9	2	INGAVIRIN	0.6	1.0
10	13	PENTALGIN	0.6	0.5
Total			7.9	6.7

The leader of the top ten INN and group names ranking also managed to hold its own in the ranking. XYLOMETAZOLINE that reduced its sales by 15% continued to hold its previous rank number one (Table 3). In addition to it, only ROSUVASTATIN (-8%) that rounded out the top ten held its own in the ranking. Some shifts took place between them in the top ten ranking, on top of that only four from the top ten ATC groups rose in the ranks. RIVAROXABAN (+31%), UMIFENOVIR (+28%), DIOSMIN*HESPERIDIN (+3%) and APIXABAN (+77%) moved up to ranks two through five, respectively. On top of that, the second and fourth brands broke into the ranks of the top-10 ranking for the first time. PANCHEATIN (-8%), BISOPROLOL (-10%), IBUPROFEN (-16%) and NIMESULIDE (-11%) that reduced their sales and fell in the ranks moved down to ranks six through nine. The total share of the top-ten INNs and grouping names increased from 9.4% to 11.0%.

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

Rank	3 mon. 2021	3 mon. 2020	INNs/Grouping Names	Share in total pharmacy sales, %	
				3 mon. 2021	3 mon. 2020
1	1		XYLOMETAZOLINE	1.5	1.6
2	4		RIVAROXABAN	1.5	1.0
3	11		UMIFENOVIR	1.1	0.8
4	7		DIOSMIN*HESPERIDIN	1.1	0.9
5	24		APIXABAN	1.0	0.5
6	3		PANCHEATIN	1.0	1.0
7	5		BISOPROLOL	1.0	1.0
8	2		IBUPROFEN	1.0	1.0
9	8		NIMESULIDE	0.9	0.9
10	10		ROSVASTATIN	0.8	0.8
Total				11.0	9.4

As in the rankings reviewed above, the leader of the top ten ATC groups held its own in the ranking: C09 Agents acting on the renin-angiotensin system (-10%) continued to lead the top ten ranking (Table 4). B01 Antithrombotic agents were ranked second in the list of leaders, increasing sales by 18%. It should be noted that only one more group, A11 Vitamins (+6%), which broke into the top ten ranking for the first time, moving up to the last rank, showed an increase in sales. Another newcomer, N06 Psychoanaleptics (-6%), moved one rank up, coming in at rank nine. Group G03 Sex hormones (-6%) also managed to rise in the ranks, moving up to rank six from nine. At the same time, they displaced M01 Anti-inflammatory and antirheumatic products (-13%), J05 Antivirals for systemic use (-32%) and J01 Antibacterials for systemic use (-19%) one rank down. R01 Nasal preparations (-19%) and N02 Analgesics (-17%) held their previous ranks four and eight. In total, the top ten ATC groups accumulated 37.7%, whereas the year– earlier period they accounted for 37.4%.

Table 4. The top ten ATC Groups by pharmacy sales

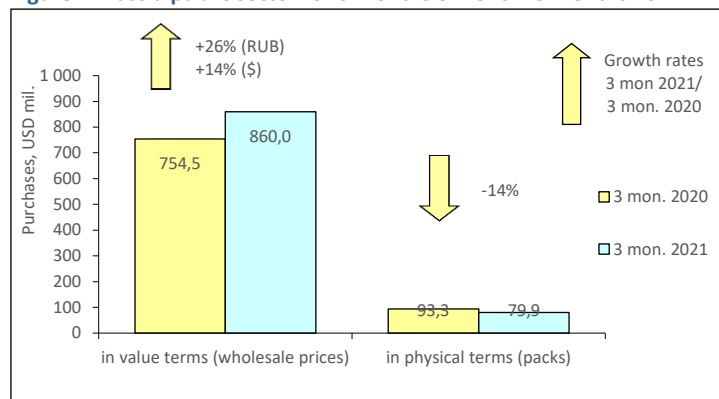
Rank		ATC code	ATC group	Share in total pharmacy sales, %	
3 mon. 2021	3 mon. 2020			3 mon. 2021	3 mon. 2020
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.4	5.3
2	6	B01	ANTITHROMBOTIC AGENTS	4.8	3.5
3	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.7	4.7
4	4	R01	NASAL PREPARATIONS	3.6	3.9
5	3	J05	ANTIVIRALS FOR SYSTEMIC USE	3.5	4.6
6	9	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.5	3.3
7	5	J01	ANTIBACTERIALS FOR SYST USE	3.4	3.7
8	8	N02	ANALGESICS	3.1	3.3
9	11	N06	PSYCHOANALEPTICS	2.9	2.7
10	15	A11	VITAMINS	2.8	2.4
Total				37.7	37.4

Conclusion. Based on the results for the first three months of 2021, the pharmacy retail market of Russia brought in RUB 269.158 bil. (USD 3.622 bil.). As compared with the same period of 2020, the dynamics was negative both (-12%) in terms of roubles, and in terms of dollars (-21%). In pack terms, the market also showed considerable decline (-20%) as compared to the previous year and amounted to 1.020 bil. packs. In January-March 2021, the average cost of an FPP pack in the national pharmacies was USD 3.55, in the year-earlier period it was USD 3.58. The average expenses of the Russian Federation residents for purchase of OTC drugs in pharmacies in the first quarter of 2021 reduced as compared to the previous year (USD 24.78 vs. USD 31.10).

RUSSIAN FEDERATION HOSPITAL MARKET: FIRST THREE MONTHS RESULTS 2021

According to the results of the 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 quarter of 2021 reduced by 14% in physical terms and amounted to 79,922 mil. packs. In value terms, the market showed a 26% increase in terms of roubles and 14% in terms of dollars and reached RUB 63.902 bil. (USD 859.992 mil.) at wholesale prices. Based on the results for the first three months of 2021, the average cost of an FPP pack in the hospital sector was USD 10.76, whereas in the year-earlier period its cost was USD 8.09.

Figure 1. Russia public sector for 3 months of 2020 – 3 months 2021



The top 10 manufacturers in the public segment of Russia have changed a lot at the end of the first quarter of 2021 as compared to the same period last year (Table 1). All of its manufacturers, with the exception of SANOFI (-46%), showed positive growth rates, most of which were high. This allowed six manufacturers to rise in the ranks. Thus, ROCHE moved up to rank one from three due to a 55% increase in purchases. R-PHARM (purchases increased 17.5 times) and PFIZER (3.2 times) moved up to ranks two and three from the fourth and second groups of top ten manufacturers. Another newcomer, ASTRAZENECA (+30%), rounded out the top ten ranking. The markets of BRISTOL MYERS (+61%), which held its previous rank six, as well as NOVARTIS (+66%) and BAYER (+46%), which moved up to ranks seven and eight, developed at a fast pace. On the contrary, BIOCAD (+12%) and MSD (+4%), which showed low growth rates, moved down to rank four and five, respectively. The total share of the top 10 manufacturers increased from 40.8% to 49.9%.

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

Rank in the top ten		Manufacturer*	Share in total public procurement segment, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	3	ROCHE	8.2	6.7
2	36	R-PHARM	6.5	0.5
3	11	PFIZER	6.3	2.5
4	2	BIOCAD RF	6.3	7.0
5	1	MSD	5.8	7.1
6	6	BRISTOL MYERS SQU	5.6	4.4
7	9	NOVARTIS	4.0	3.0
8	10	BAYER	2.9	2.5
9	4	SANOFI	2.1	5.0
10	13	ASTRAZENECA	2.1	2.0
Total			49.9	40.8

*AIPM members are in bold.

The overwhelming majority of the top-10 brands ranking showed high growth rates (Table 2). At the same time, five of them rose in the ranks. Thus, the OPDIVO brand (+79%) moved up to rank one from two, displacing KEYTRUDA (+57%), which showed the outperforming, but lower growth rates, one rank down. The newcomers ARTLEGIA, PREVENAR 13 (11-fold growth in purchases), CORONAVIR and HEPARIN (8-fold growth), which broke into the top ten ranking for the first time, significantly rose in the ranks, moving up to rank three through five and nine, respectively. Despite the above market growth rates, the brands KADCYLA (+75%) and TECENTRIQ (+36%) moved down to ranks seven and ten. Due to lagging behind the market rates, AVEGRA (+9%) and PERJETA (+20%) fell in the ranks, losing three and two points each, respectively. The total share of the top 10 brands in the public segment expanded from 14.9% to 27.6%.

Table 2. The top 10 brands by public procurement segment volume

Rank in the top ten		Brand	Share in total public procurement segment, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	2	OPDIVO	4.6	3.3
2	1	KEYTRUDA	4.3	3.5
3	N/A	ARTLEGIA	3.6	N/A
4	31	PREVENAR 13	3.2	0.4
5	N/A	CORONAVIR	2.7	N/A
6	3	AVEGRA BIOCAD	2.3	2.7
7	6	KADCYLA	2.0	1.5
8	4	PERJETA	2.0	2.1
9	34	HEPARIN	1.5	0.2

Rank in the top ten		Brand	Share in total public procurement segment, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
10	8	TECENTRIQ	1.5	1.3
Total			27.6	14.9

Following the respective brand, NIVOLUMAB (+79%) became the leader of the top ten INNs and grouping name ranking, moving up to rank one from two (Table 3). One of the four newcomers, FAVIPRAVIR, moved up to ranks two. Three more newcomers that broke into the top ten ranking for the first time, OLOKIZUMAB, VACCINE, PNEUMOCOCCAL CONJUGATE (11-fold growth) and ENOXAPARIN SODIUM (4.1-fold growth) moved up to ranks four, five and eight, respectively. TRASTUZUMAB EMTANSINE (+75%) retained its previous rank seven, while the remaining four INNs fell in the ranks. This is the former leader, but displaced by more dynamic INNs, INN PEMBROLIZUMAB (+57%), as well as INNs BEVACIZUMAB (+12%), PERTUZUMAB (+20%) and TRASTUZUMAB (-15%), which moved down to ranks six and two last ranks. The total share accumulated by the top-ten INNs and grouping names increased from 16.7% to 30.4%.

Table 3. The top 10 INNs and grouping names by public procurement segment volume

Rank		INNs/Grouping Names	Share in total public procurement segment, %	
3 mon. 2021	3 mon. 2020		3 mon. 2021	3 mon. 2020
1	2	NIVOLUMAB	4.6	3.3
2		FAVIPRAVIR	4.5	
3	1	PEMBROLIZUMAB	4.3	3.5
4		OLOKIZUMAB	3.6	
5	37	VACCINE, PNEUMOCOCCAL CONJUGATE	3.2	0.4
6	3	BEVACIZUMAB	2.5	2.8
7	7	TRASTUZUMAB EMTANSINE	2.0	1.5
8	22	ENOXAPARIN SODIUM	2.0	0.6
9	5	PERTUZUMAB	2.0	2.1
10	4	TRASTUZUMAB	1.8	2.6
Total			30.4	16.7

In contrast to above rankings, the leader of the top ten ATC groups did not change: L01 Antineoplastic agents (+23%) held their previous rank one (Table 4). Some shifts took place in the lower part of the top ten ranking with the result that four ATC-groups rose in the ranks. J01 Antibacterial drugs for systemic use (2.2-fold growth in purchases), B01 Antithrombotic agents (3.4 times) and L04 Immunosuppressants (4.8-fold growth) moved up to ranks two through four, respectively. One newcomer broke into the ranks of the top 10 ranking. M09 Other drugs for disorders of the musculoskeletal system moved up to rank nine from 31 (8.9-fold growth). Group J05 Antivirals for systemic use (-35%), J07 Vaccines (-34%), B05 Blood substitutes and perfusion solutions (-5%) and V08 Contrast media (-15%) moved down to ranks five to seven and the last rank, respectively. L02 Endocrine therapy (+31%) also lost one ranking point, despite a pronounced upward trend. In total, the top ten ATC groups accumulated 83.8% of the public segment, whereas in the year-earlier period they accounted for 80.4%.

Table 4. The top 10 brands by public procurement segment volume

Rank		ATC code	ATC group	Share in total public procurement segment, %	
3 mon. 2021	3 mon. 2020			3 mon. 2021	3 mon. 2020
1	1	L01	ANTINEOPLASTIC AGENTS	35.6	36.6
2	4	J01	ANTIBACTERIALS FOR SYST USE	8.8	5.2
3	6	B01	ANTITHROMBOTIC AGENTS	8.7	3.3
4	8	L04	IMMUNOSUPPRESSANTS	8.6	2.2
5	2	J05	ANTIVIRALS FOR SYSTEMIC USE	7.4	14.4
6	3	J07	VACCINES	4.9	9.3
7	5	B05	PLASMA SUBSTITUTES AND PERFUSION SOLUTIONS	3.1	4.1
8	7	L02	ENDOCRINE THERAPY	2.8	2.7
9	31	M09	OTHER DRUGS FOR DISORD. OF THE MUSCULO-SKELET.SYST	2.5	0.4
10	9	V08	CONTRAST MEDIA	1.5	2.2
Total				83.8	80.4

Conclusion. Based on the results for January-March of 2021, the Russian public segment continued to demonstrate high positive growth rates both in rouble terms (+26%) and in dollar terms (+14%). Its volume amounted to RUB 63.902 bil. (USD 859.992 bil.). In pack terms, the market reduced by 14% and amounted to 79,922 mil. packs. At the end of the first three months of 2021, the average cost of a finished pharma product (FPP) pack in the public segment amounted to USD 10.76 vs. USD 8.09 in the year earlier period.

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

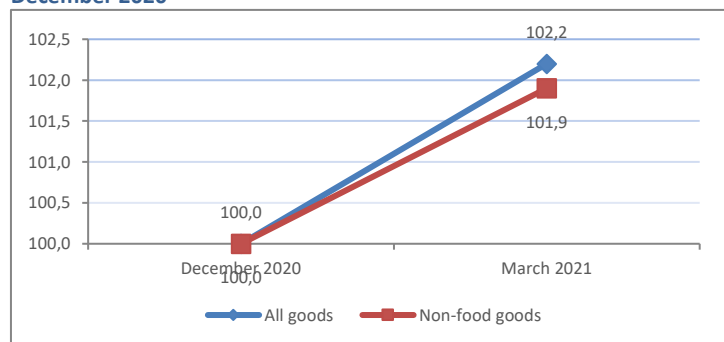
Macroeconomic indices

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

Value	March-January 2021	March-January 2021 (%) vs March-January 2020
Industrial production index		109.8
Retail turnover, RUB bil.	3085.3	100.5
Monthly average accrued wage per one worker (nominal), RUB	67,477	108.5
real		102.9

Note: CFD TOGS data

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



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

Figure 1. Movement of weighted average prices and retail margins in Q 1 2020 - Q 1 2021

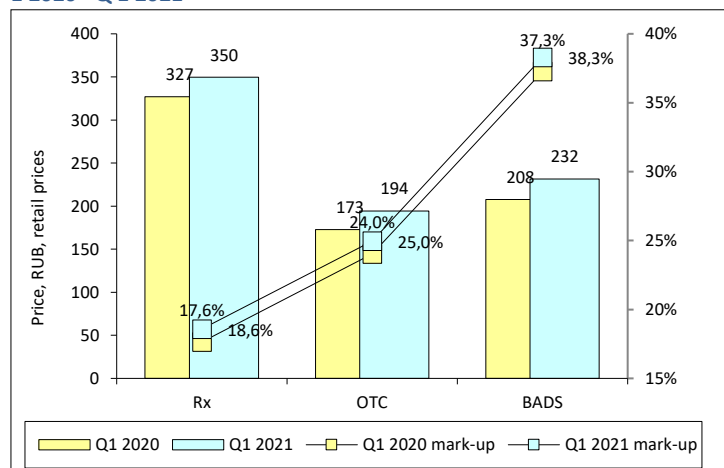
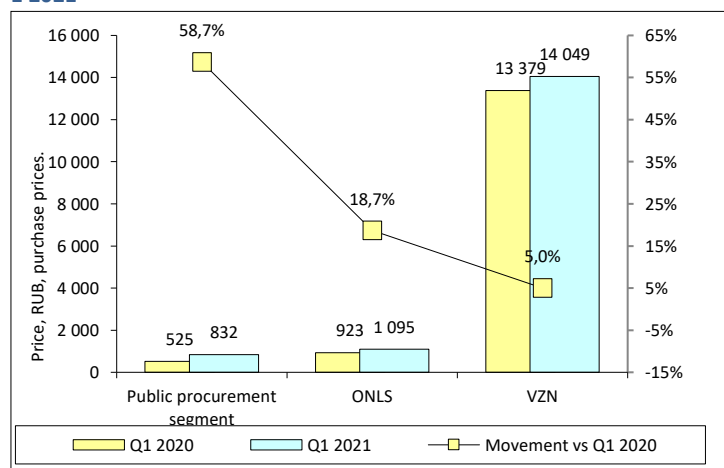


Figure 2. Movement of weighted average purchase prices in Q1 2020 - Q 1 2021



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

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

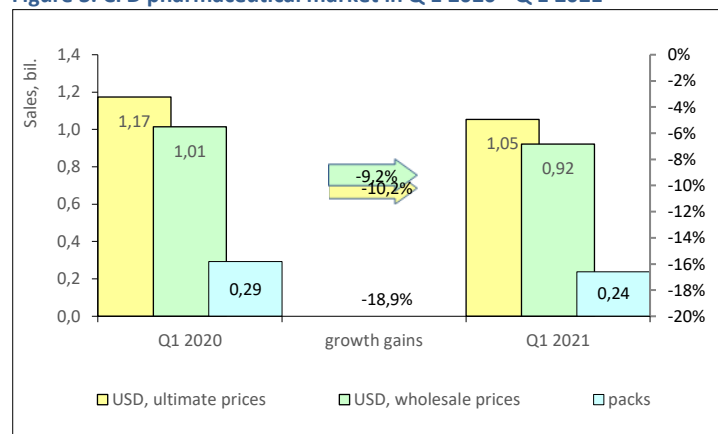


Figure 4. Structure of the CFD pharmaceutical market by major segments in Q 1 2020 - Q 1 2021

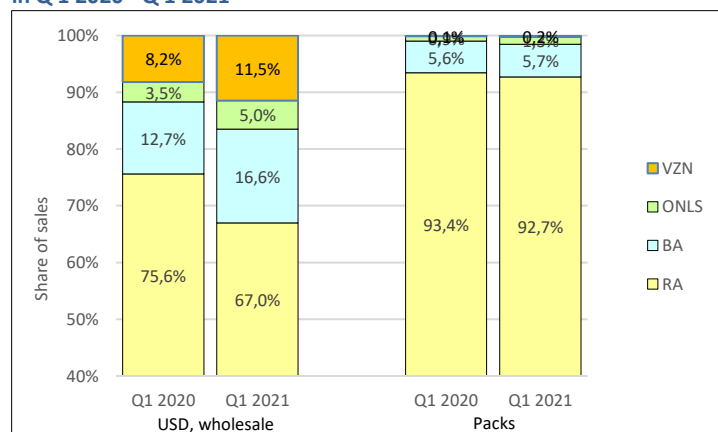


Figure 5. Structure of the retail segment of CFD market in Q 1 2020 - Q 1 2021

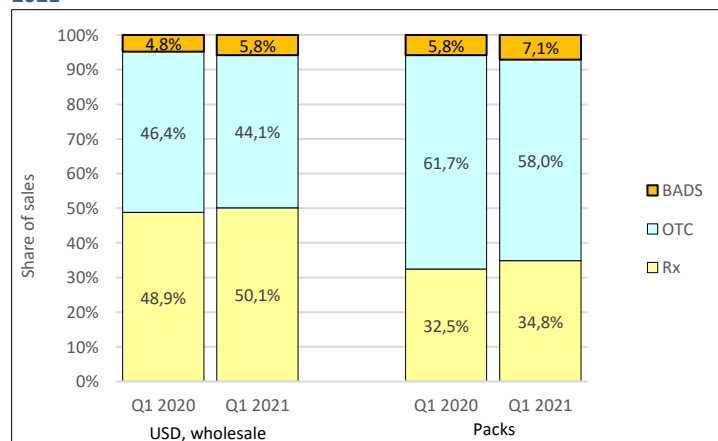
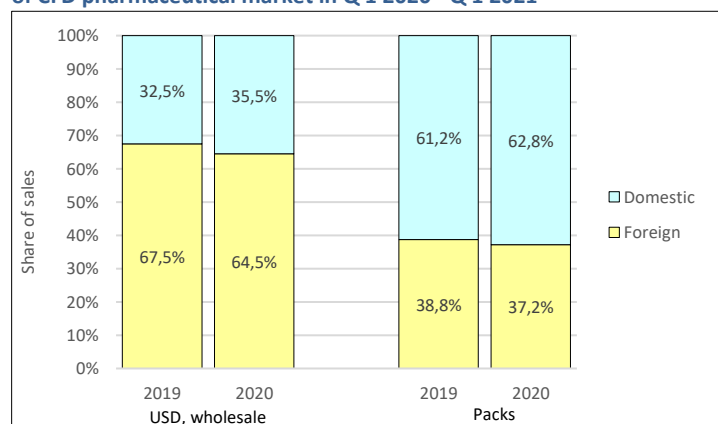


Figure 6. Movement of the Russian/foreign drugs share in the structure of CFD pharmaceutical market in Q 1 2020 - Q 1 2021



³ Exclusive of Moscow

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

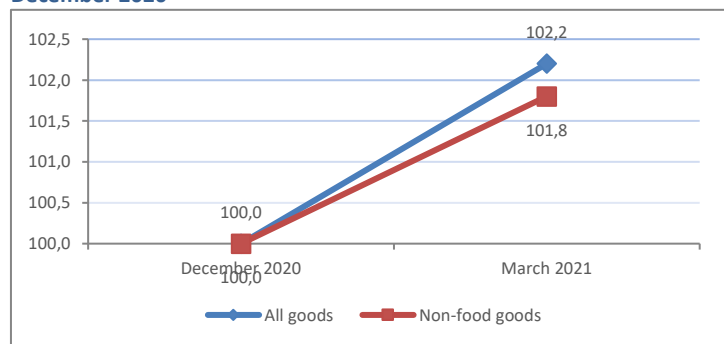
Macroeconomic indices

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

Value	March-January 2021	March-January 2021 (%) vs March-January 2020
Industrial production index		99.5
Retail turnover, RUB bil.	882.0	100.3
Monthly average accrued wage per one worker (nominal), RUB	58.493	106.1
real		100.8

Note: NWFD TOGS data

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



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

Figure 1. Movement of weighted average prices and retail margins in Q 1 2020 - Q 1 2021

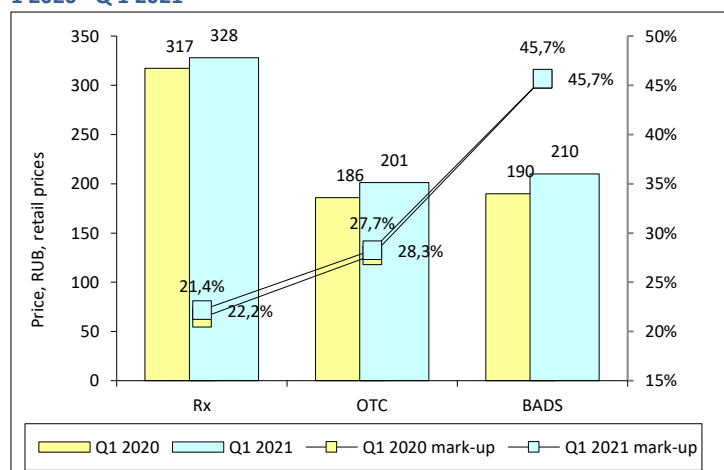
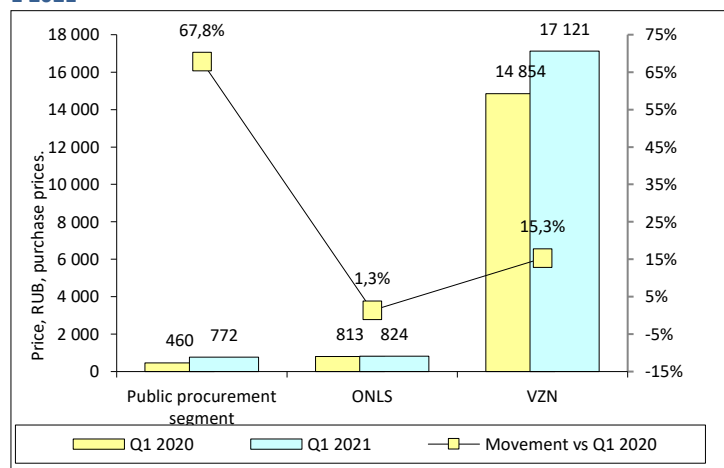


Figure 2. Movement of weighted average purchase prices in Q1 2020 - Q 1 2021



Indicators of movement and structure of the market⁴ (based on the results of IQVIA data)

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

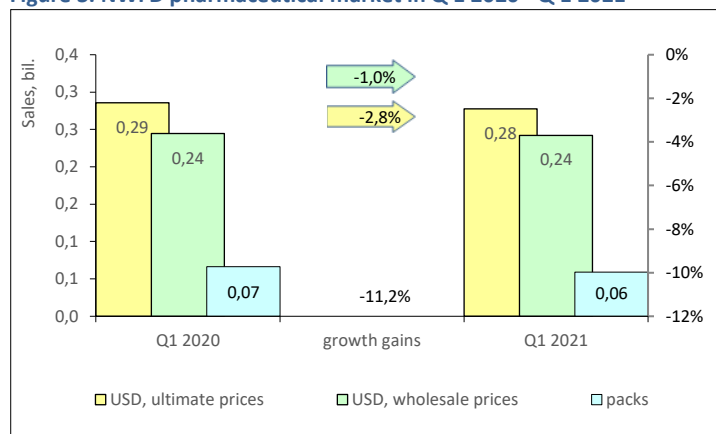


Figure 4. Structure of the NWFD pharmaceutical market by major segments in Q 1 2020 - Q 1 2021

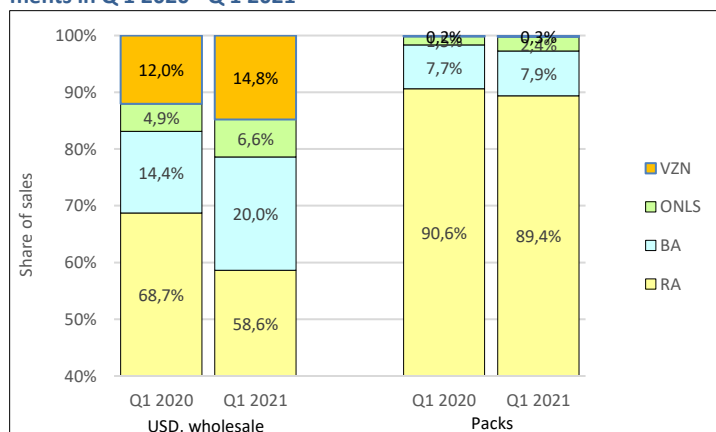


Figure 5. Structure of the retail segment of NWFD pharmaceutical market in Q 1 2020 - Q 1 2021

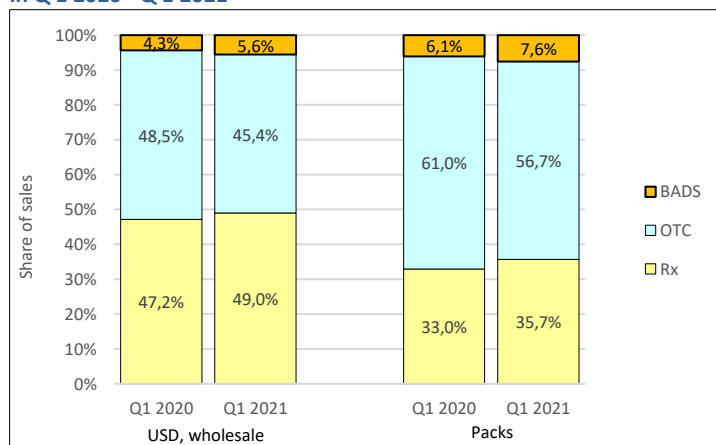
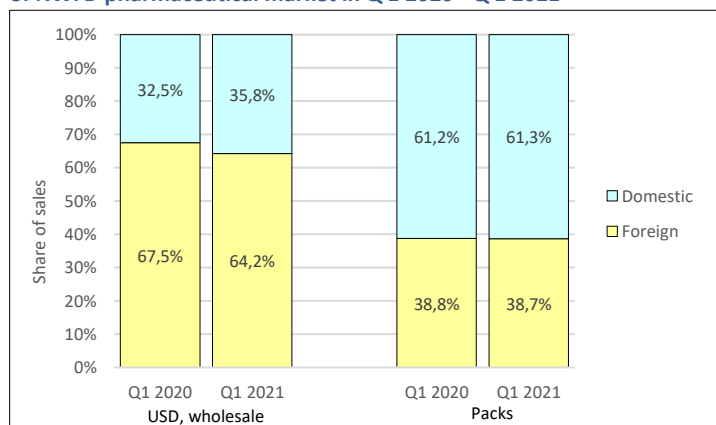


Figure 6. Movement of the Russian/ foreign drugs share in the structure of NWFD pharmaceutical market in Q 1 2020 - Q 1 2021



⁴ Exclusive of St. Petersburg

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

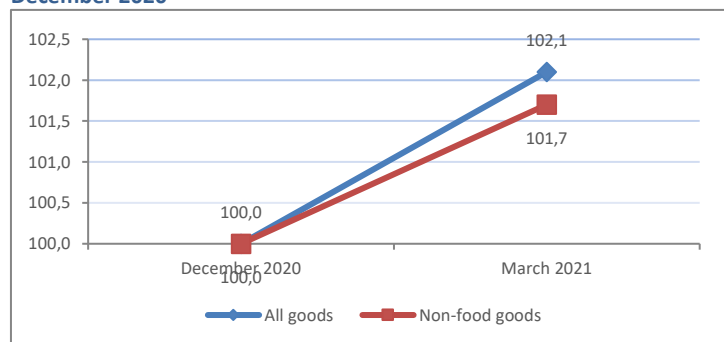
Macroeconomic indices

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

Value	March-January 2021	March-January 2021 (%) vs March-January 2020
Industrial production index		100.0
Retail turnover, RUB bil.	1,458.0	95.9
Monthly average accrued wage per one worker (nominal), RUB	37,141	106.5
real		100.6

Note: VFD TOGS data

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



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

Figure 1. Movement of weighted average prices and retail margins in Q 1 2020 - Q 1 2021

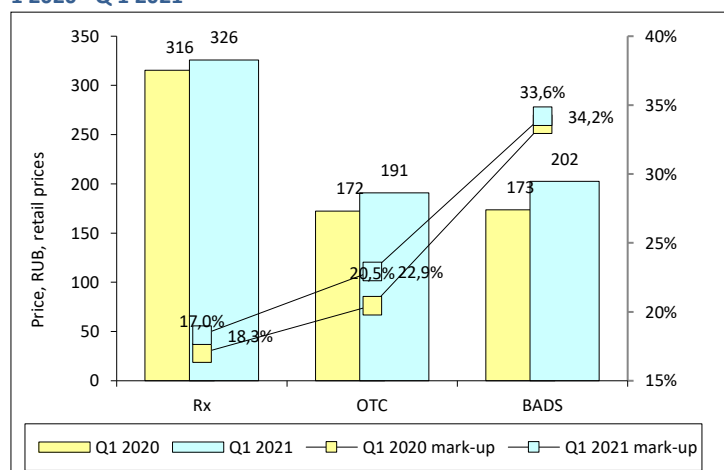
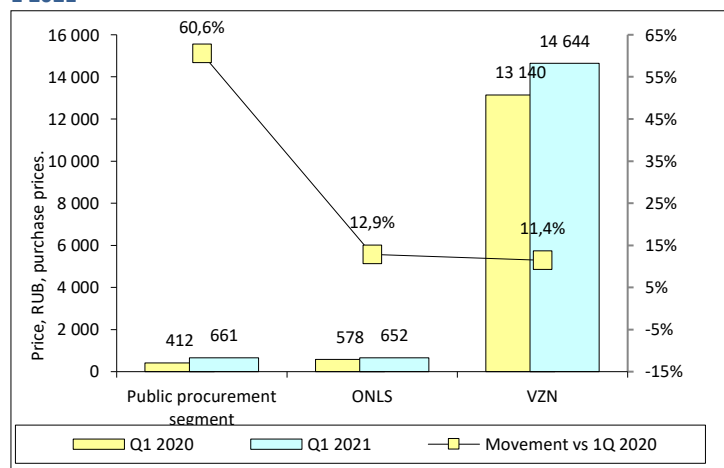


Figure 2. Movement of weighted average purchase prices in Q 1 2020 - Q 1 2021



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

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

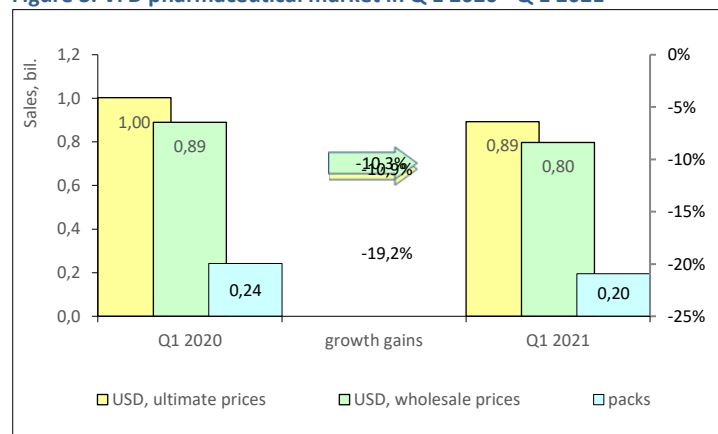


Figure 4. Structure of the VFD pharmaceutical market by major segments in Q 1 2020 - Q 1 2021

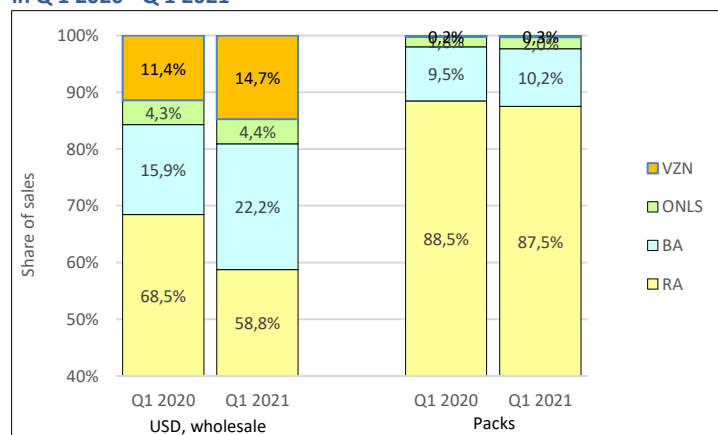


Figure 5. Structure of the retail segment of VFD pharmaceutical market in Q 1 2020 - Q 1 2021

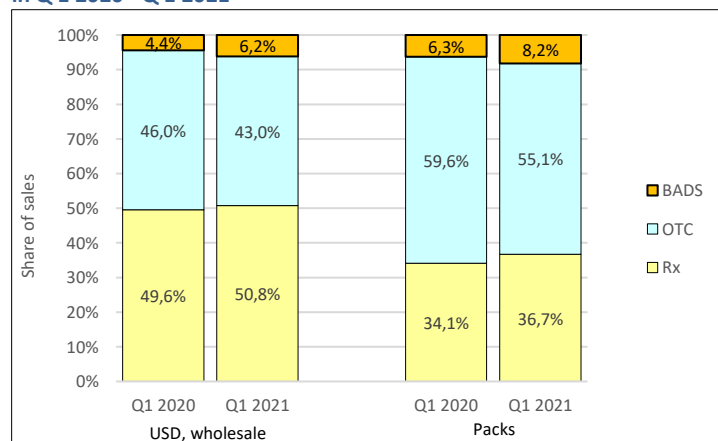
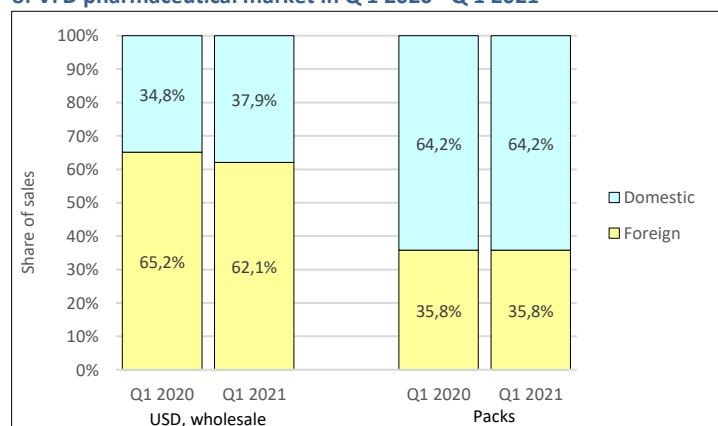


Figure 6. Movement of the Russian/ foreign drugs share in the structure of VFD pharmaceutical market in Q 1 2020 - Q 1 2021



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

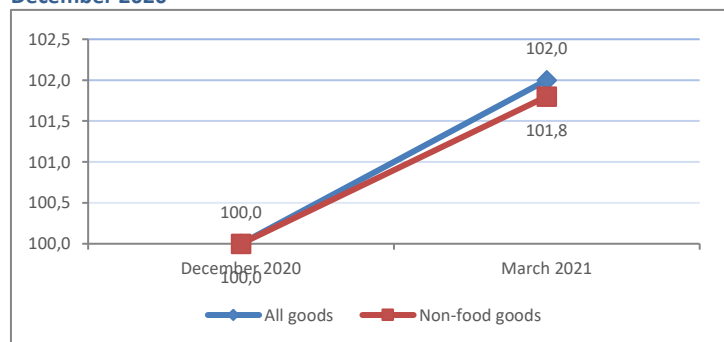
Macroeconomic indices

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

Value	March-January 2021	March-January 2021 (%) vs March-January 2020
Industrial production index		98.2
Retail turnover, RUB bil.	708.2	95.0
Monthly average accrued wage per one worker (nominal), RUB	54,601	105.3
real		100.3

Note: VFD TOGS data

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



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

Figure 1. Movement of weighted average prices and retail margins in Q 1 2020 - Q 1 2021

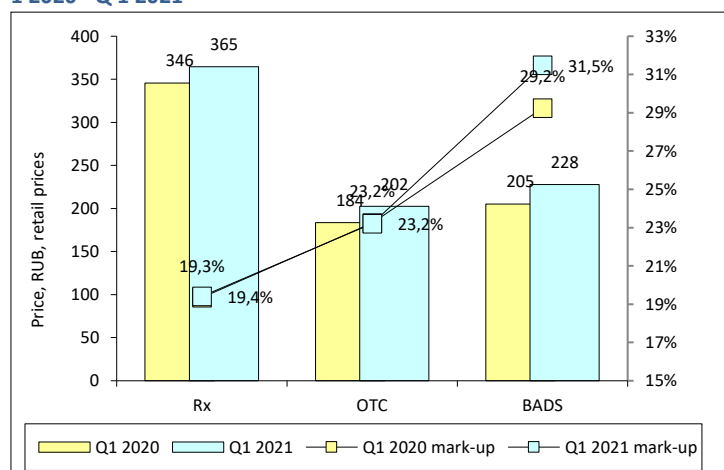
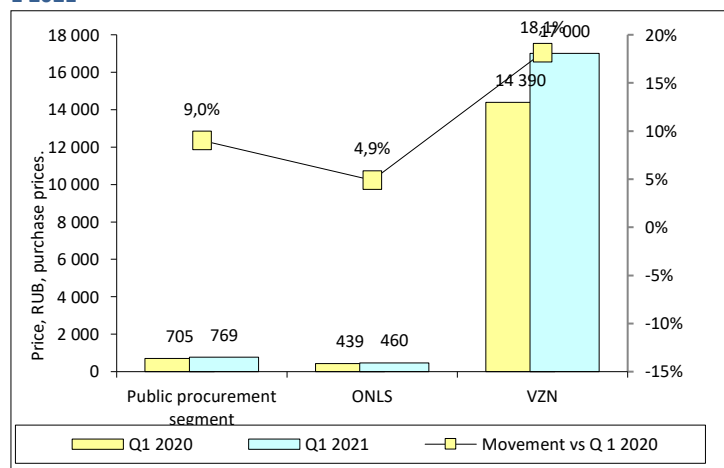


Figure 2. Movement of weighted average purchase prices in Q 1 2020 - Q 1 2021



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

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

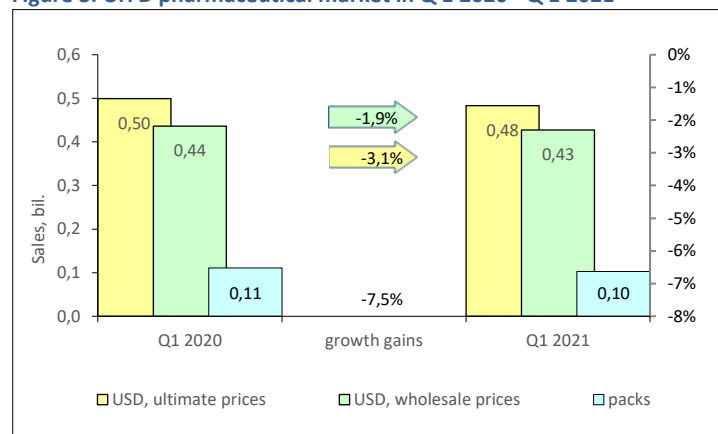


Figure 4. Structure of UFD pharmaceutical market by major segments in Q 1 2020 - Q 1 2021

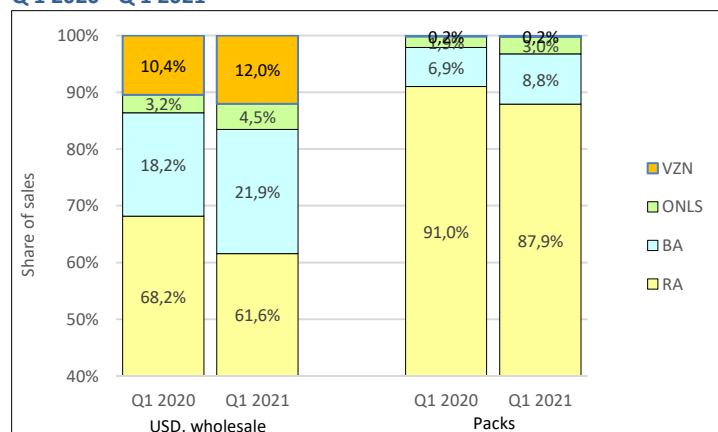


Figure 5. Structure of the retail segment of UrFD pharmaceutical market in Q 1 2020 - Q 1 2021

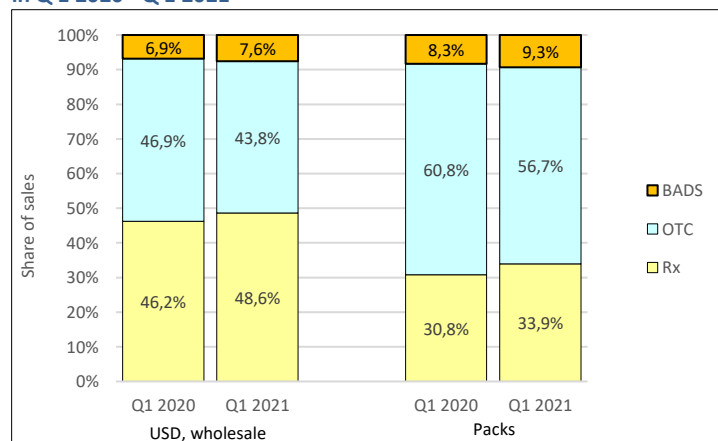
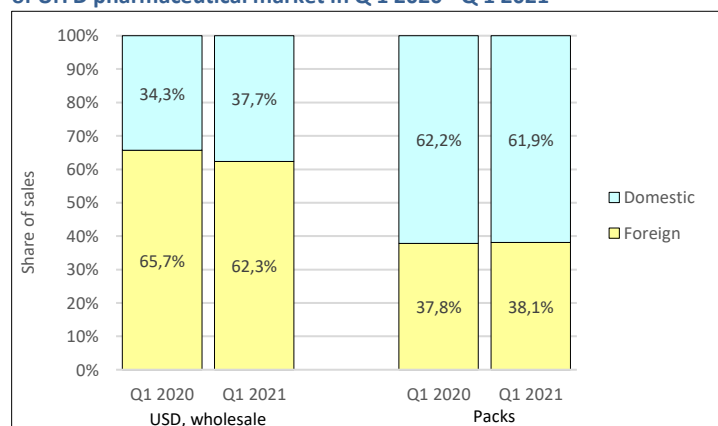


Figure 6. Movement of the Russian/ foreign drugs share in the structure of UrFD pharmaceutical market in Q 1 2020 - Q 1 2021



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

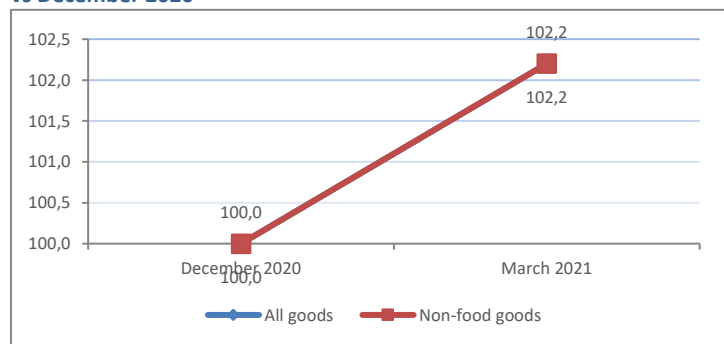
Macroeconomic indices

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

Value	March-January 2021	March-January 2021 (%) vs March-January 2020
Industrial production index		97.2
Retail turnover, RUB bil.	741.0	97.7
Monthly average accrued wage per one worker (nominal), RUB	44,117	106.8
real		101.3

Note: SiFD TOGS data

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



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

Figure 1. Movement of weighted average prices and retail margins in Q 1 2020 - Q 1 2021

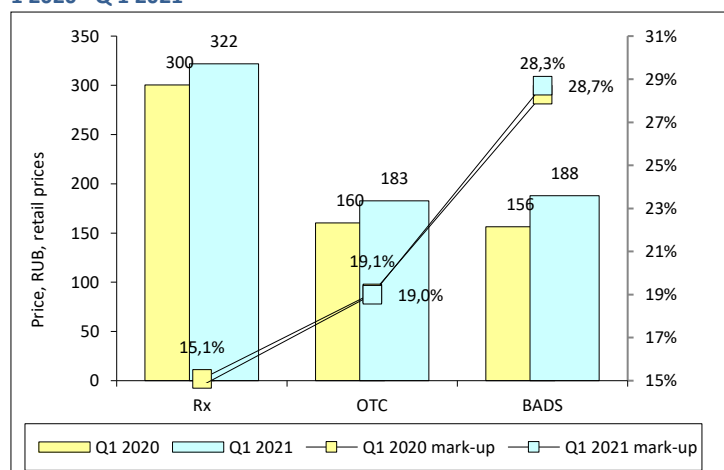
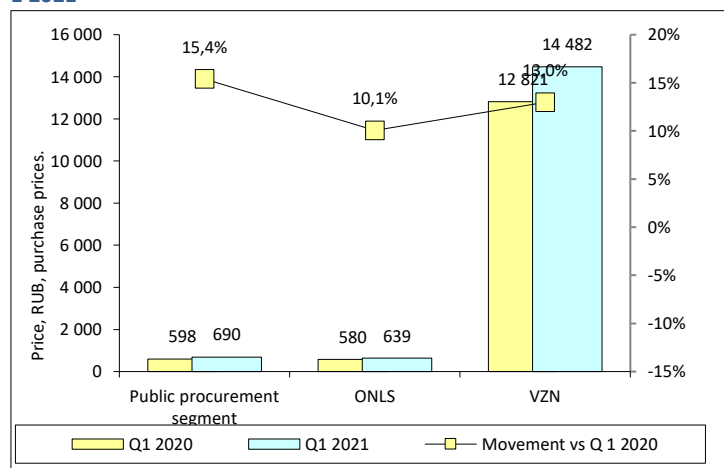


Figure 2. Movement of weighted average purchase prices in Q 1 2020 - Q 1 2021



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

Figure 3. SiFD pharmaceutical market in Q 1 2020 - Q 1 2021

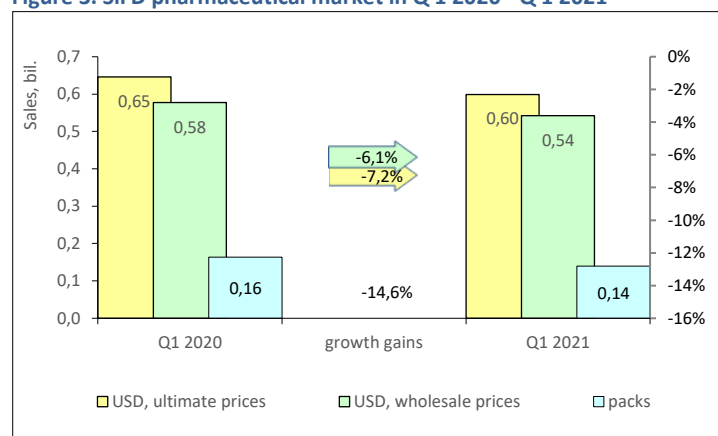


Figure 4. Structure of SiFD pharmaceutical market by major segments in Q 1 2020 - Q 1 2021

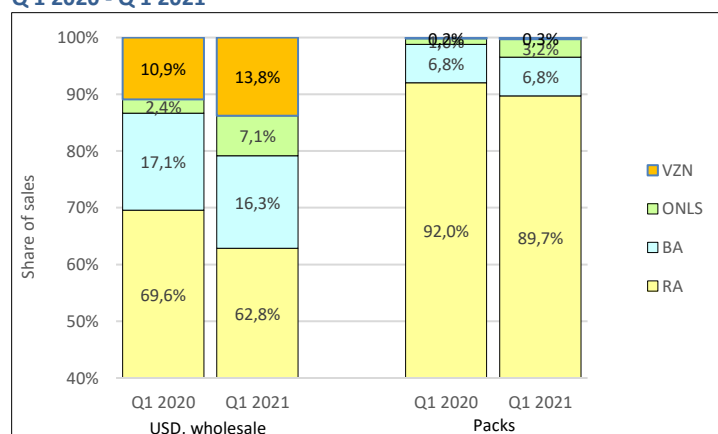


Figure 5. Structure of the retail segment of SiFD pharmaceutical market in Q 1 2020 - Q 1 2021

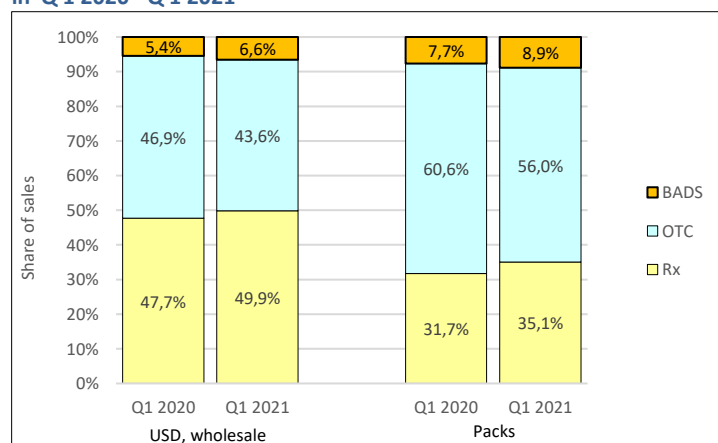
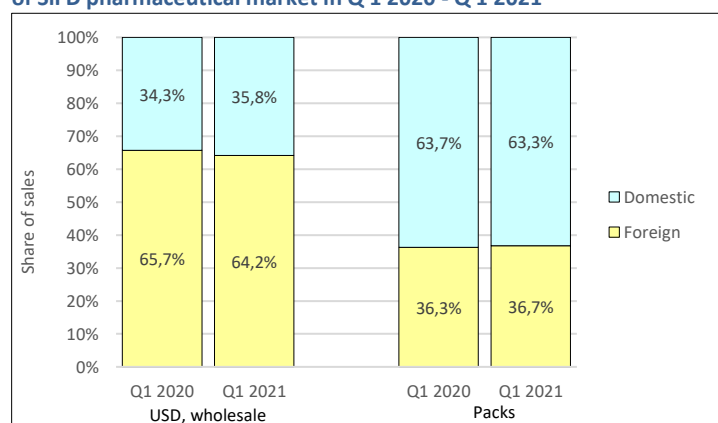


Figure 6. Movement of the Russian/ foreign drugs share in the structure of SiFD pharmaceutical market in Q 1 2020 - Q 1 2021



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

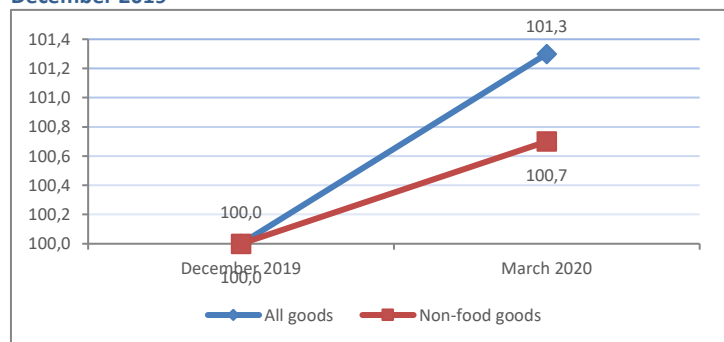
Macroeconomic indices

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

Value	March-January 2021	March-January 2021 (%) vs March-January 2020
Industrial production index		102.0
Retail turnover, RUB bil.	907.8	99.9
Monthly average accrued wage per one worker (nominal), RUB	36,569	105.2
real		100.7

Note: SoFD TOGS data

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



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

Figure 1. Movement of weighted average prices and retail margins in Q 1 2020 - Q 1 2021

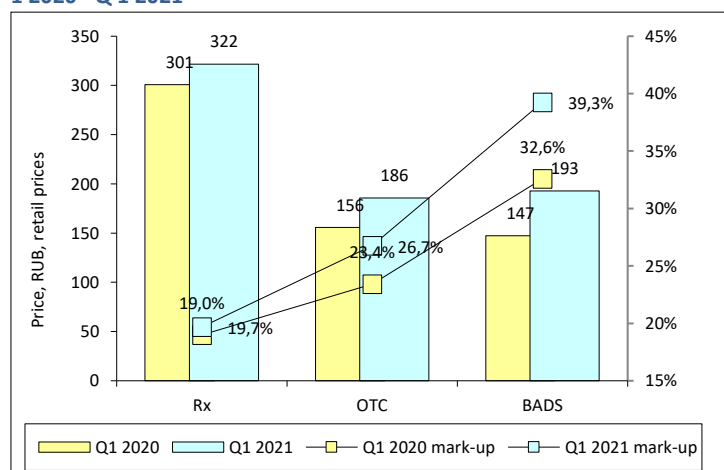
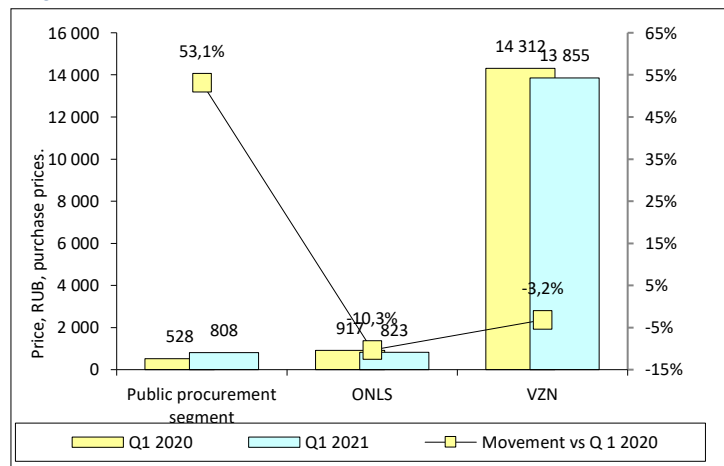


Figure 2. Movement of weighted average purchase prices in Q 1 2020 - Q 1 2021



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

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

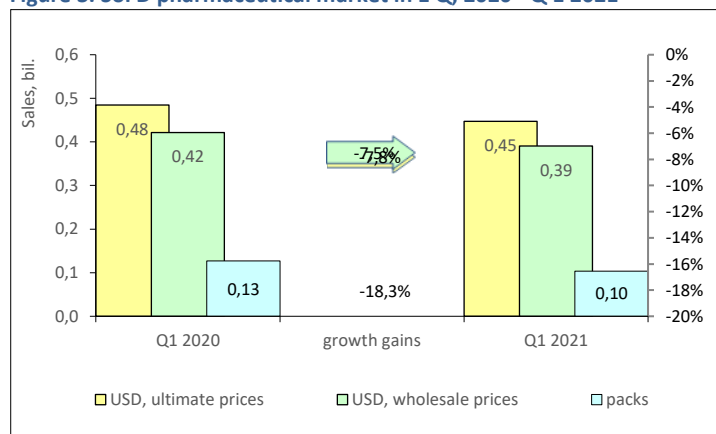


Figure 4. Structure of SoFD pharmaceutical market by major segments in Q 1 2020 - Q 1 2021

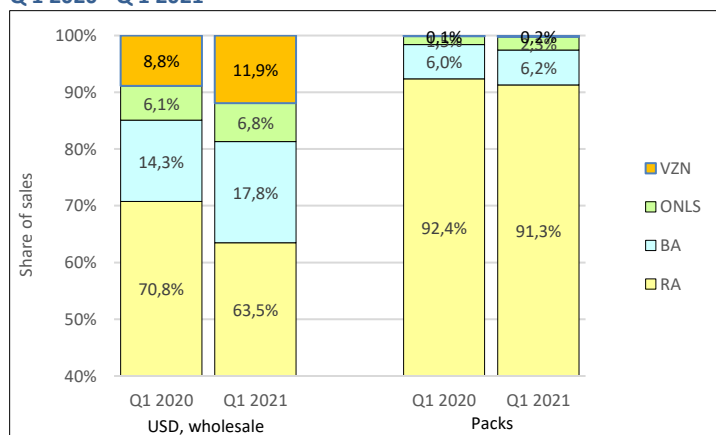


Figure 5. Structure of the retail segment of SoFD pharmaceutical market in Q 1 2020 - Q 1 2021

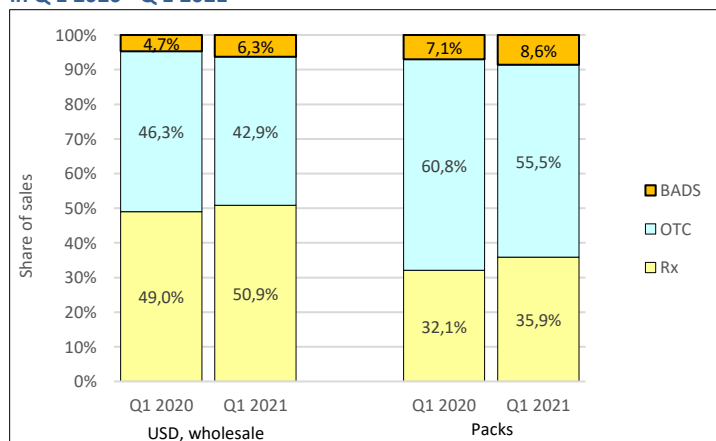
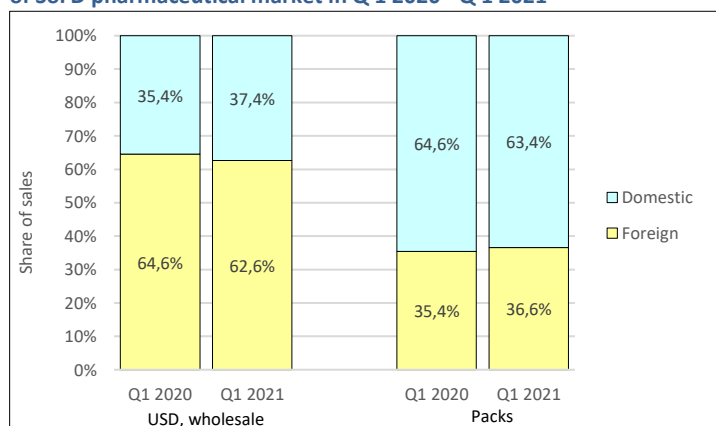


Figure 6. Movement of the Russian/ foreign drugs share in the structure of SoFD pharmaceutical market in Q 1 2020 - Q 1 2021



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

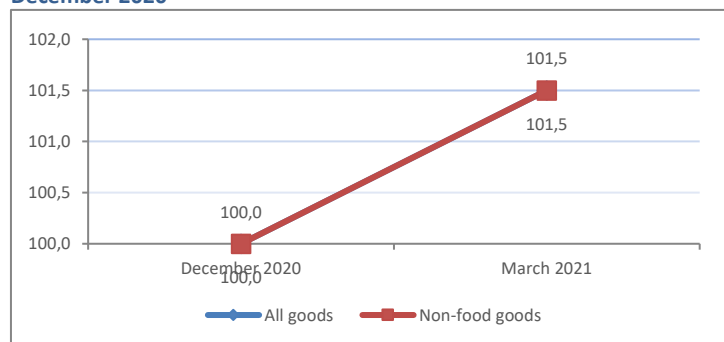
Macroeconomic indices

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

Value	March-January 2021	March-January 2021 (%) vs March-January 2020
Industrial production index		96.9
Retail turnover, RUB bil.	480.3	100.2
Monthly average accrued wage per one worker (nominal), RUB	60,040	107.0
real		101.8

Note: FEFD TOGS data

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



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

Figure 1. Movement of weighted average prices and retail margins in Q 1 2020 - Q 1 2021

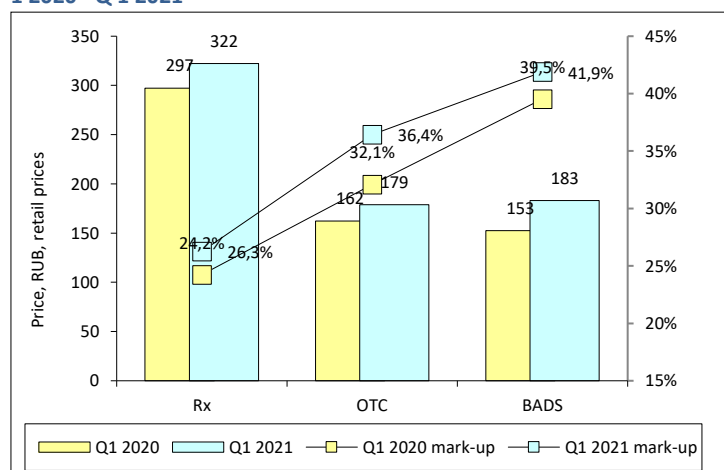
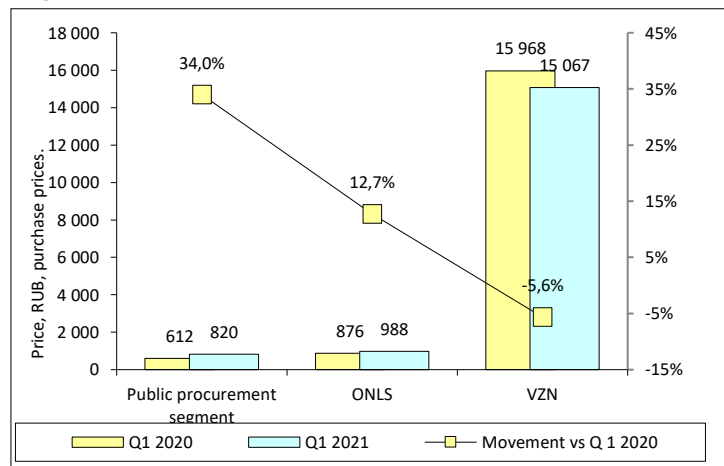


Figure 2. Movement of weighted average purchase prices in Q 1 2020 - Q 1 2021



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

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

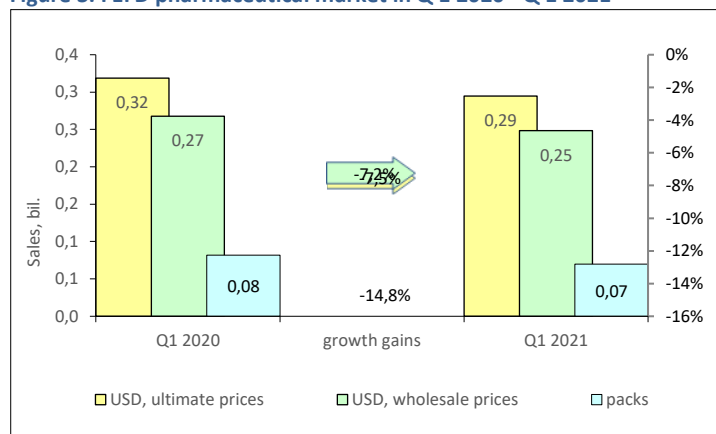


Figure 4. Structure of the FEFD pharmaceutical market by major segments in Q 1 2020 - Q 1 2021

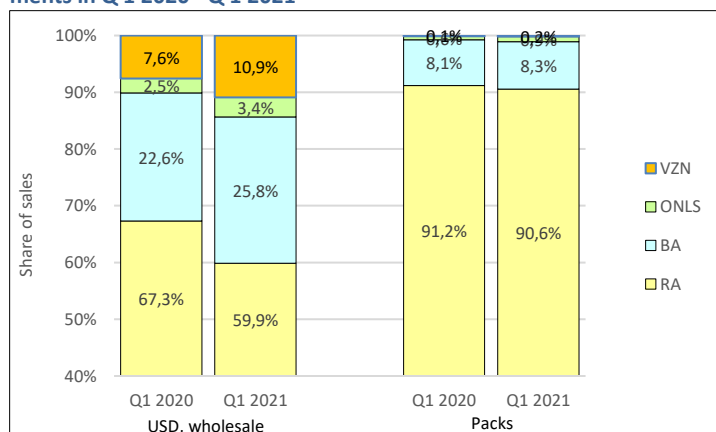


Figure 5. Structure of the retail segment of FEFD pharmaceutical market in Q 1 2020 - Q 1 2021

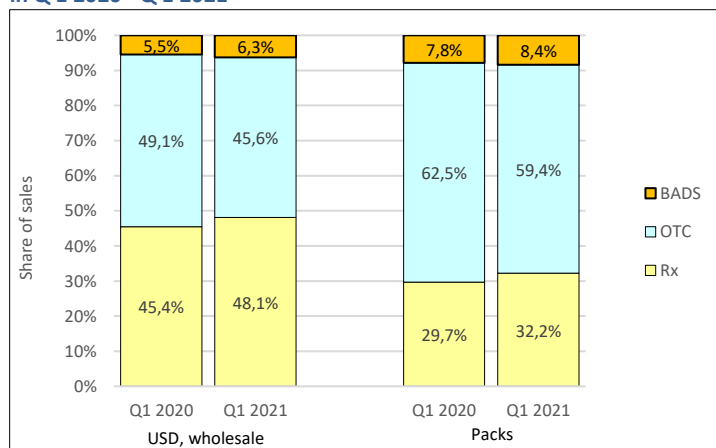


Figure 6. Movement of the Russian/ foreign drugs share in the structure of FEFD pharmaceutical market in Q 1 2020 - Q 1 2021

