

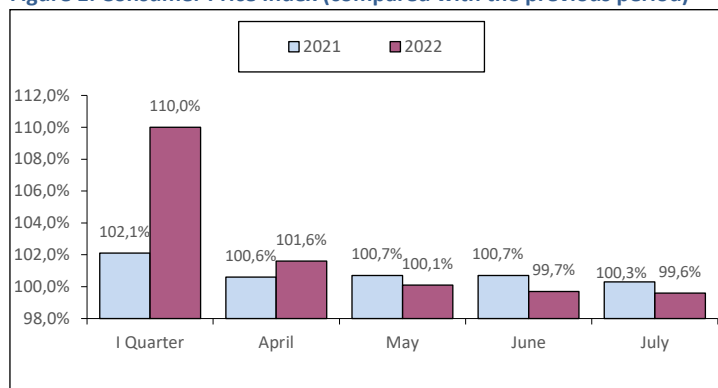
MACROECONOMIC INDICES

Inflation

According to Federal State Statistics Service's data, the Consumer Price Index was estimated at 99.6% in July 2022, and 111.0% as compared to December of 2021.

In July 2022, Industrial Producer Price Index was 97.8% as compared to the previous month, in the month-earlier period it had amounted to 95.9%. The index accounted for 102.3% against December of 2021.

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



Living standard

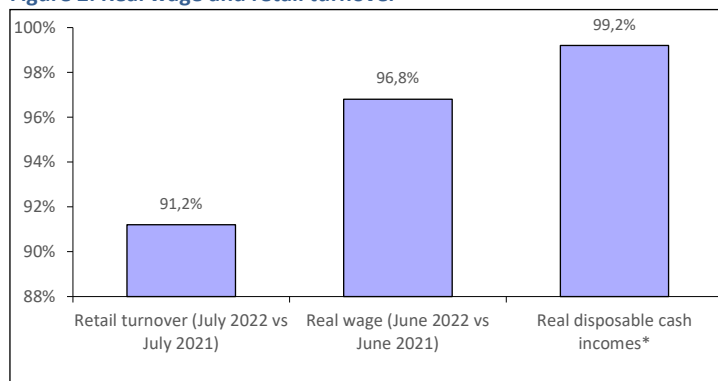
In June 2022, a gross monthly average wage of corporate employees reached RUB 66572 (USD 1164.25). It increased by 112.2% as compared to June 2021, and 106.5% as compared to the previous period. In June 2022, the real gross wage accounted for 96.8% as compared to June 2021, and 106.9% against the prior period.

According to estimates¹, real disposable cash incomes decreased by 99.2% in the first half of 2022 as compared to the first half of 2021 (Fig. 2).

Retail turnover

In July 2022, the retail turnover was equal to RUB 3541.0 bil. or 91.2% (in comparable prices) against the respective period of the previous year, and RUB 24010.5 bil. or 95.7% in January - July 2022 (Fig. 2).

Figure 2. Real wage and retail turnover



* First half of 2022 vs first half of 2021

Industrial Production

According to Federal State Statistics Service's data, in July 2022 Industrial Production Index accounted for 99.5% compared to the same period in the previous year, and 101.0% in January-July 2022.

According to Federal State Statistics Service's data, Industrial Production Index for drugs and medical products accounted for 117.5% in July 2022 compared to the same period of 2021, and 123.9% in January-July 2022 vs January-July of 2021.

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 2022.

Figure 1. The top ten Russian chemical and pharmaceutical manufacturers by sales volume in July 2022

Rank in the top ten	Manufacturer	RUB mil.
1	Biocad	2703.0
2	Binnopharm	2383.1
3	Stada	2255.3
4	Pharmasyntez	1994.5
5	Otcpharm	1893.8
6	Pharmstandart	1872.3
7	Servier	1792.3
8	Microgen	1599.4
9	Atoll	1362.4
10	Vertex	1314.2

Source: IQVIA

Table 2 provides pharmacy sales data from 10 regions of the Russian Federation. In June 2022 compared to May 2022, growth in sales (in terms of roubles) was observed almost in all regions. The highest performance was observed in Krasnodar Krai (+34%), the lowest one in Tatarstan (+3%). The sales in Perm decreased by 7%.

Table 2. Pharmacy sales in the regions, 2022

Region	Pharmacy sales, \$ mil. (wholesale prices)			Growth gain, % (roubles)		
	April 2022	May 2022	June 2022	April/June 22	May/April 22	June/ May 22
Moscow	151.1	168.7	212.3	-55%	-7%	11%
St. Petersburg	69.2	84.3	99.9	-49%	1%	5%
Krasnodar Krai	41.5	46.2	69.8	-41%	-8%	34%
Krasnoyarsk Krai	23.2	26.6	32.7	-34%	-5%	9%
Tatarstan	22.8	27.1	31.5	-31%	-1%	3%
Rostov Region	23.2	27.8	35.0	-42%	-0.2%	11%
Novosibirsk Region	23.0	26.0	33.6	-35%	-6%	14%
Voronezh Region	14.3	18.0	23.2	-46%	4%	14%
Perm	9.0	9.7	10.1	-35%	-11%	-7%
Tyumen	8.6	10.2	12.1	-37%	-2%	6%

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 2022

Rank	Company*	Quantity of broadcasts
1	Otcpharm	10,108
2	Petrovax	3,840
3	Binnopharm	3,680
4	Egis	3,056
5	Dr. Reddy's Laboratories	2,860

Source - Remedium according to Mediascope's data

Table 4. The top five brands in mass media in July 2022

Rank	Brand*	Quantity of broadcasts
1	Pentalgin	3,168
2	Renewal	2,839
3	Detralex	1,799
4	Suprastinex	1,740
5	Dibicor	1,695

Source - Remedium according to Mediascope's data

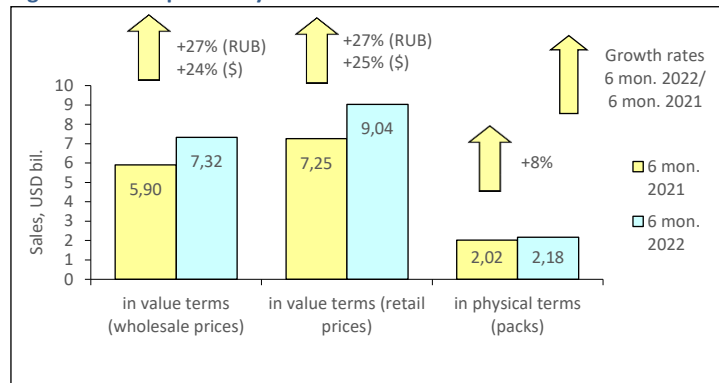
* Only drugs registered with National Medicine Register were considered.

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: 2022 FIRST SIX MONTHS RESULTS

According to the results of the Retail Audit of FPP (Finished Pharmaceutical Products) in Russian Federation™, at the end of the first six months of 2022 the sales of drugs in physical terms in the country saw a 8% increase to 2.176 bil. packs as compared to the same period of 2021. In money terms, the market increased by 27% in terms of roubles and 24% in terms of dollars. The volume of the market amounted to RUB 556.238 bil. (USD 7.323 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 4.15 in January-June of 2022 vs USD 3.59 in 2021. Consumer spending for drugs in Russia averaged to USD 62.09 for the first half of 2022, whereas during the same period a year ago it averaged to USD 49.63.

Figure 1. Russia pharmacy market for 6 months of 2021 – 6 months 2022.*



Based on the results for the first six month of 2022, BAYER (+19%)² continued to show the highest sales on the Russian retail market among the drug manufacturers (Table 1). However, due to lagging growth rates, its market share slightly decreased. On the contrary, STADA (+35%) and SANOFI (+34%), which showed the highest growth in the top 10, expanded their shares and moved up to ranks two and three. The markets of SERVIER (+29%), KRKA and GLAXOSMITHKLINE (+28% each) also developed at a fast pace, which allowed them to move up to ranks five, six and nine, respectively. On top of that, the latter appeared in the top 10 ranking for the first time. At the same time, the less dynamic SANOFI (+13%), STADA (+17%), TEVA (+2%) lost two ranks each and BERLIN-CHEMIE/MENARINI (+22%) lost one, moving down to ranks four, six and ten, respectively. ABBOTT (+25%) held its previous rank seven. The total share of the top ten manufacturers reduced by 0.6 p.p. compared to the same period of the previous year and accounted for 33.2%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
			6 mon. 2022	6 mon. 2021
1	1	BAYER	4.8	5.1
2	3	STADA	3.9	3.7
3	4	OTCPHARM	3.7	3.5
4	2	SANOFI	3.4	3.8
5	5	SERVIER	3.3	3.2
6	8	KRKA	2.9	2.9
7	7	ABBOTT	2.9	3.0
8	6	TEVA	2.9	3.1
9	11	GLAXOSMITHKLINE	2.7	2.7
10	9	BERLIN-CHEMIE/MENARINI	2.7	2.8
Total			33.2	33.8

*AIPM members are in bold

The leading four brands in the top-10 brands ranking remained unchanged in composition, however there was a rotation of the names placed at ranks two and three (Table 2). ARBIDOL (+95%) that showed the highest rates among the top brands moved up to rank two, displacing ELIQUIS (+47%) one rank down. XARELTO (+15%) and DETRALEX (+26%) continued to retain their previous ranks one and four. In addition to the said ARBIDOL, NUROFEN (+36%), INGAVIRIN (+60) and CARDIOMAGNYL (+33%) showed high sales growth rates. On top of that, the first moved up to rank five, the second one broke into the ranks of the top ten brands, coming in at number six, and the last one held its previous rank ten. At the same time, HEPTRAL (+12%), CONCOR (+15%) and MEXIDOL (+16%) moved down to ranks seven through nine, respectively. The total share of the top 10 brands increased from 7.6% to 8.1%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
			6 mon. 2022	6 mon. 2021
1	1	XARELTO	1.3	1.4
2	3	ARBIDOL	1.2	0.8
3	2	ELIQUIS	1.1	1.0
4	4	DETRALEX	0.8	0.8

* Here and elsewhere we shall use IQVIA's data

Rank in the top ten		Brand	Share in total pharmacy sales, %	
			6 mon. 2022	6 mon. 2021
5	7	NUROFEN	0.7	0.6
6	12	INGAVIRIN	0.6	0.5
7	5	HEPTRAL	0.6	0.7
8	6	CONCOR	0.6	0.7
9	8	MEXIDOL	0.6	0.6
10	10	CARDIOMAGNYL	0.6	0.5
Total			8.1	7.6

The top 10 INN and grouping names ranking changed its leader: XYLOMETAZOLINE (+31%) moved up to rank one from two (Table 3). UMIFENOVIR (+99%), which moved up from rank nine, was ranked second in the ranking. At the same time, they displaced the last year's leader RIVAROXABAN (+15%) and the composition DIOSMIN*HESPERIDIN (+34%) placed at rank three to ranks three and four. APIXABAN (+47%) managed to improve its positions, moving up from rank eight to five, displacing the less dynamic IBUPROFEN (+38%). Due to lagging growth rates, BISOPROLOL (+14%) and PANCREATIN (+18%) fell in the ranks, moving down to ranks eight and nine, respectively. NIMESULIDE (+35%) and ROSUVASTATIN (+39%) held their previous ranks seven and ten. The total share of the top-ten INNs and grouping names increased from 10.7% to 11.4%.

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

Rank in the top ten		INN/Grouping name	Share in total public segment, %	
			6 mon. 2022	6 mon. 2021
1	2	XYLOMETAZOLINE	1.5	1.4
2	9	UMIFENOVIR	1.4	0.9
3	1	RIVAROXABAN	1.3	1.4
4	3	DIOSMIN*HESPERIDIN	1.2	1.2
5	8	APIXABAN	1.1	1.0
6	5	IBUPROFEN	1.1	1.0
7	7	NIMESULIDE	1.0	1.0
8	4	BISOPROLOL	0.9	1.0
9	6	PANCREATIN	0.9	1.0
10	10	ROSUVASTATIN	0.9	0.8
Total			11.4	10.7

C09 Agents acting on the rennin-angiotensin system (+25%), M01 Anti-inflammatory and antirheumatic products (+41%) and B01 Antithrombotic agents (+22%) remained the bestselling groups based on the results for 6 months of 2022 (Table 4). J05 Antivirals for systemic use (+67%), the most dynamic among the top ten ATC groups, moved up to rank four. At the same time, despite outperforming growth rates, it moved G03 Sex hormones (+36%) and R01 Nasal preparations (+32%) down one rank. N02 Analgesics (+30%) and N06 Psychoanaleptics (+45%), which moved up to ranks seven and eight, as well as R05 Cough and cold preparations (+34%), which entered the top 10 for the first time and rounded it out, demonstrated progress in the ranking. Group C05 Vasoprotectives (+24%) moved down to rank nine from eight. In total, the top ten ATC groups accumulated 37.8%, whereas in the year-earlier period — 36.4%.

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. 2022	6 mon. 2021
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.4	5.5
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.1	4.9
3	3	B01	ANTITHROMBOTIC AGENTS	4.4	4.6
4	7	J05	ANTIVIRALS FOR SYSTEMIC USE	4.0	3.1
5	4	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.8	3.6
6	5	R01	NASAL PREPARATIONS	3.5	3.4
7	9	N02	ANALGESICS	3.0	3.0
8	10	N06	PSYCHOANALEPTICS	3.0	2.9
9	8	C05	VASOPROTECTIVES	2.9	3.0
10	15	R05	COUGH AND COLD PREPARATIONS	2.6	2.5
Total				37.8	36.4

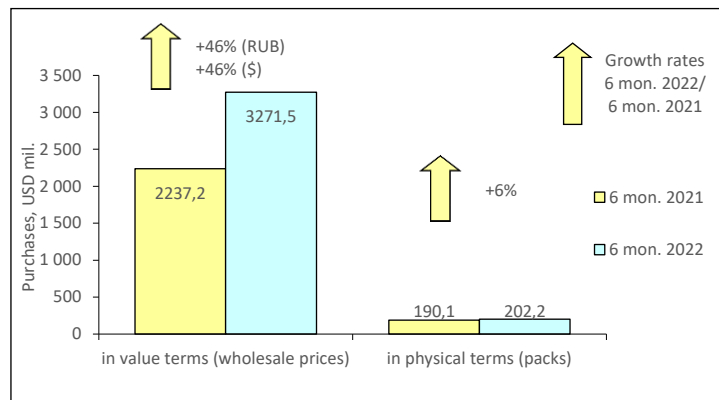
Conclusion. In January-June of 2022, the retail pharmacy market of the country reached RUB 685.953 bil. (USD 9.037 bil.). As compared with the same period of 2022, the growth rates were positive both (+27%) in terms of roubles, and in terms of dollars (+25%). In pack terms, the market increased by 8% compared to the previous year and amounted to 2.176 bil. packs. In the first half of 2022, the average cost of an FPP pack in the national pharmacies was USD 4.15, whereas in the year-earlier period it was USD 3.59. The average expenses of the Russian Federation residents for purchase of drugs in the pharmacies based on the results for the first six months of 2022 increased as compared to 2021 (USD 62.09 vs. USD 49.63).

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

RUSSIAN FEDERATION HOSPITAL MARKET: 2022 FIRST SIX MONTHS RESULTS

According to the results of the Budget Audit of Finished Pharma Products (FPP) in the Russian Federation (without DLO and regional benefit)[™], in the first half of 2022 the public procurement segment of the country in physical terms increased by 6% as compared to the same period of the previous year and amounted to 202.214 mil. packs. In value terms, the market expanded by 46% both in terms of roubles and in terms of dollars and reached RUB 242.878 bil. (USD 3.272 bil.) at wholesale prices. Based on the results for January-June of 2022, the average price per FPP pack in the hospital sector of the country was USD 16.18, whereas in the year-earlier period its price was USD – 11.77.

Figure 1. Russia's public procurement sector for 6 months of 2021 – 6 months 2022.*



In January-June 2022, most manufacturers from the top ten ranking in the public procurement segment showed outstripping growth rates and progress in the ranking (Table 1). Among them are the leaders of the top ten MSD (+73%) and BIOCAD (+81%). PHARMASYNTEZ (2.7-fold growth in purchases), ASTRAZENECA (2.8-fold growth) и PROMOMED (4.7-fold growth) demonstrated a more than two-fold increase in purchases, moving up to ranks four, seven and nine, respectively. On top of that, the latter two drug manufacturers broke into the ranks of the top-10 ranking for the first time. Due to outstripping growth rates, BRISTOL MYERS (+48%) and NOVARTIS (+88%) moved two ranks up, coming in at numbers five and six. In contrast, three drug manufacturers with relatively low and negative growth rates fell in the ranks. The last year leader ROCHE (+31%), as well as R-PHARM (+29%) and OHNSON & JOHNSON (-40%) moved down to ranks three, eight and the last one, respectively. In total, the top ten manufacturers accounted for 50.2% of the public procurement segment against 46% in a year earlier period, according to the results for the first half of 2022.

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

Rank in the top ten		Manufacturer*	Share in total public procurement segment, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	3	MSD	7.5	6.4
2	4	BIOCAD RF	7.3	5.9
3	1	ROCHE	7.1	8.0
4	10	PHARMASYNTEZ	4.9	2.7
5	7	BRISTOL MYERS SQU	4.5	4.5
6	8	NOVARTIS	4.3	3.3
7	11	ASTRAZENECA	4.2	2.2
8	6	R-PHARM ZAO RF	4.0	4.5
9	23	PROMOMED	3.4	1.0
10	2	JOHNSON & JOHNSON	3.1	7.6
Total			50.2	46.0

*AIPM members are in bold

Four newcomers broke into the ranks of the top ten brands (Table 2). ILSIRA (4.1-fold growth in purchases), ESPERAVIR, ZOLGENSMA (2.9-fold growth) and EVUSHELD moved up to ranks three through six, respectively. KEYTRUDA that showed a 67% growth in purchases and moved up from rank three became the leader of the ranking. The less dynamic TIVICAY (+76%) moved one rank up, to number seven. In contrast, the brands AVEGRA (+32%) and PERJETA (+51%) moved down to ranks eight and ten. The brands OPDIVO (+45%) and CORONAVIR (+80%) held their previous ranks two and nine. The total share of the top 10 brands in the public segment expanded from 16.4% to 24.6%.

Table 2. The top 10 brands by public segment volume

Rank in the top ten		Brand	Share in total public procurement segment, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	3	KEYTRUDA	4.3	3.8
2	2	OPDIVO	3.7	3.8
3	13	ILSIRA	3.1	1.1
4	N/A	ESPERAVIR	2.4	N/A
5	17	ZOLGENSMA	1.9	1.0
6	N/A	EVUSHELD	1.9	N/A

* Here and elsewhere we shall use IQVIA's data

Rank in the top ten		Brand	Share in total public procurement segment, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
7	8	TIVICAY	1.9	1.6
8	5	AVEGRA BIOCAD	1.8	2.0
9	9	CORONAVIR	1.8	1.4
10	7	PERJETA	1.7	1.7
Total			24.6	16.4

The top ten INN and grouping names ranking was updated by 50% - MOLNUPIRAVIR, LEVILIMAB (4.1-fold growth in purchases), ONASEMNOGENE ABEPARVOVEC (2,9-fold growth), CILGAVIMAB*TIXAGEVIMAB and REMDESIVIR (13-fold growth) broke into the top ten ranking for the first time (Table 3). The markets of PEMBROLIZUMAB (+67%), FAVIPRAVIR (2.2-fold growth) and DOLUTEGRAVIR (+76%) developed at a fast pace. On top of that, the former two moved up to ranks one and two respectively and the latter managed to retain and strengthen its previous rank nine. The less dynamic INNs NIVOLUMAB (+45%) and BEVACIZUMAB (+32%) lost one rank each, moving down to ranks three and seven. The total share accumulated by the top ten INNs and grouping names increased from 16.2% to 27.6%.

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

Rank in the top ten		INN/Grouping name	Share in total public procurement segment, %	
6 mon. 2022	6 mon. 2021		6 mon. 2022	6 mon. 2021
1	3	PEMBROLIZUMAB	4.3	3.8
2	5	FAVIPRAVIR	3.9	2.6
3	2	NIVOLUMAB	3.7	3.8
4	N/A	MOLNUPIRAVIR	3.1	N/A
5	16	LEVILIMAB	3.1	1.1
6	19	ONASEMNOGENE ABEPARVOVEC	1.9	1.0
7	6	BEVACIZUMAB	1.9	2.2
8	N/A	CILGAVIMAB*TIXAGEVIMAB	1.9	N/A
9	9	DOLUTEGRAVIR	1.9	1.6
10	45	REMDESIVIR	1.8	0.2
Total			27.6	16.2

L01 Antineoplastic agents (+40%) and J05 Antivirals for systemic use (2.4-fold growth in purchases) held their leading positions in the top 10 ATC groups ranking (Table 4). L04 Immunosuppressants (+51%) and B01 Antithrombotic agents (+18%) followed, moving up from the lower ranks. At the same time, they displaced M09 Other drugs for disorders of the musculoskeletal system (-2%) and J01 Antibacterials for systemic use (+3%) down to ranks five and six, respectively. Despite 23% reduction in purchases, J07 Vaccines held its previous rank seven. Next in the ranking was its only newcomer J06 Immune sera and immunoglobulins that increased its purchases by 4.1 times. At the same time, the less dynamic B05 Blood substitutes and perfusion solutions (+23%) and L02 Endocrine therapy (+21%) moved one rank down. In total, the top ten ATC groups accumulated 83.2% of purchases in the public procurement sector, 83.3% in the year-earlier period.

Table 4. The top 10 ATC groups by public procurement sector volume

Rank in the top ten		ATC code	ATC group	Share in total public procurement segment, %	
6 mon. 2022	6 mon. 2021			6 mon. 2022	6 mon. 2021
1	1	L01	ANTINEOPLASTIC AGENTS	29.3	30.6
2	2	J05	ANTIVIRALS FOR SYSTEMIC USE	21.2	12.9
3	4	L04	IMMUNOSUPPRESSANTS	7.5	7.3
4	6	B01	ANTITHROMBOTIC AGENTS	5.3	6.6
5	3	M09	OTHER DRUGS FOR DISORD. OF THE MUSCULO-SKELET.SYST	4.9	7.3
6	5	J01	ANTIBACTERIALS FOR SYST USE	4.7	6.7
7	7	J07	VACCINES	3.0	5.6
8	12	J06	IMMUNE SERA & IMMUNO-GLOBULIN	2.9	1.0
9	8	B05	PLASMA SUBSTITUTES AND PERFUSION SOLUTIONS	2.5	2.9
10	9	L02	ENDOCRINE THERAPY	2.0	2.4
Total				83.2	83.3

Conclusion. Based on the results for the first six months of 2022, the public procurement sector of Russia expanded by 46% in rouble and dollar terms and stood at RUB 242.878 bil. (USD 3.272 bil.). In pack terms, the market reduced by 6% and amounted to 202.214 mil. packs. At the end of the first quarter 2022, the average cost of a finished pharma product (FPP) pack in the national public procurement sector amounted to USD 16.18 vs. USD 11.77 in the year earlier period.

PHARMACEUTICAL MARKET OF THE CENTRAL FEDERAL DISTRICT (CFD) IN 1-2 Q 2022 KEY PERFORMANCE INDICATORS

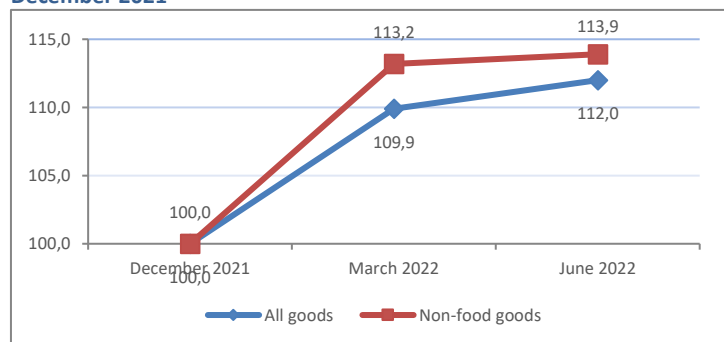
Macroeconomic indices

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

Value	December-June 2022	December-June 2022 (%) vs. December-June 2021
Industrial production index		103.2
Retail turnover, RUB bil.	7,061.2	94.6
Monthly average accrued wage per worker (nominal), RUB	79,252	113.0
real		98.8

Note: CFD Territorial Body of Federal State Service data

Figure 1. Movement of price index and non-food product price index vs December 2021



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

Figure 1. Movement of weighted average purchase prices and retail margins in 1-2 Q 2021 – 1-2 Q 2022*

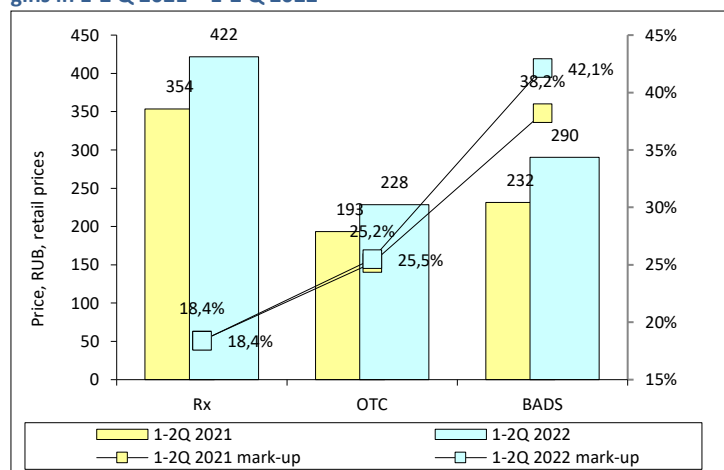
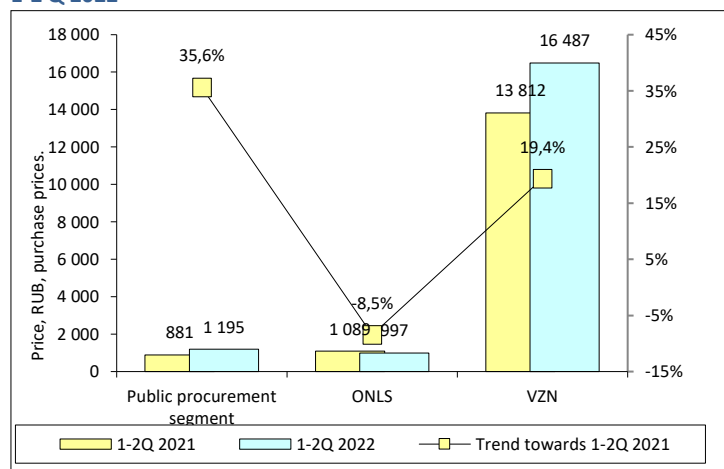


Figure 2. Movement of weighted average purchase prices, 1-2 Q 2021 – 1-2 Q 2022



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

Figure 3. CFD pharmaceutical market in 1-2 Q, 2021 – 1-2 Q 2022

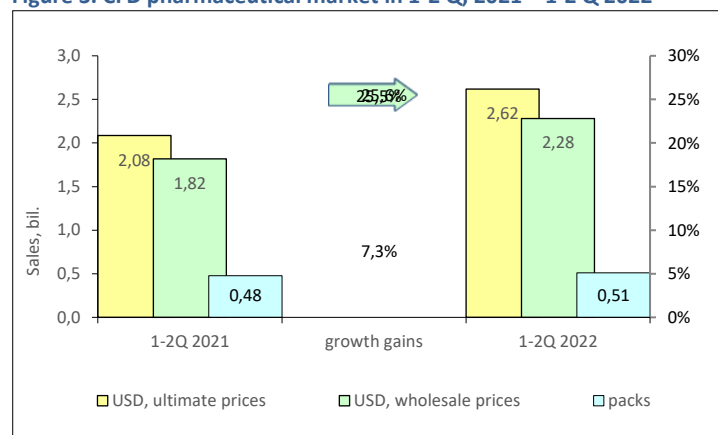


Figure 4. Structure of CFD pharmaceutical market by major segments in 1-2 Q 2021 – 1-2 Q 2022

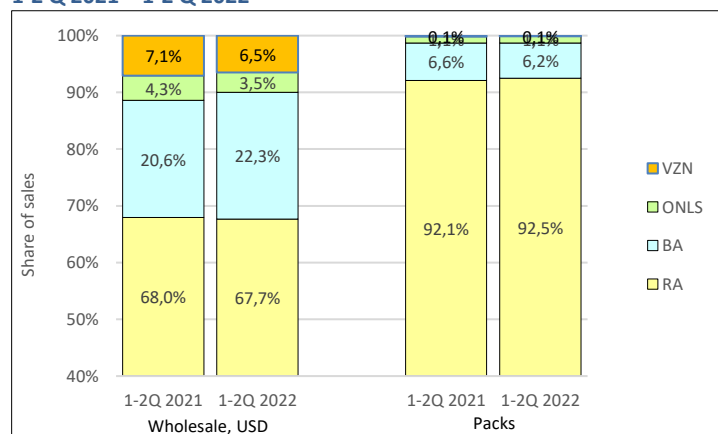


Figure 5. Structure of the retail segment of CFD pharmaceutical market in 1-2 Q 2021 – 1-2 Q 2022

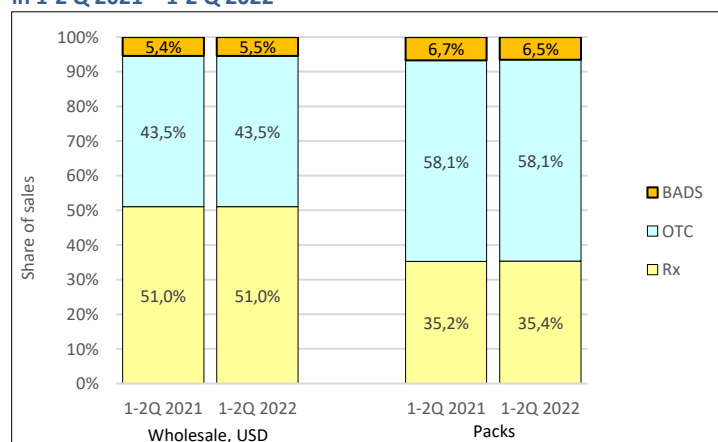
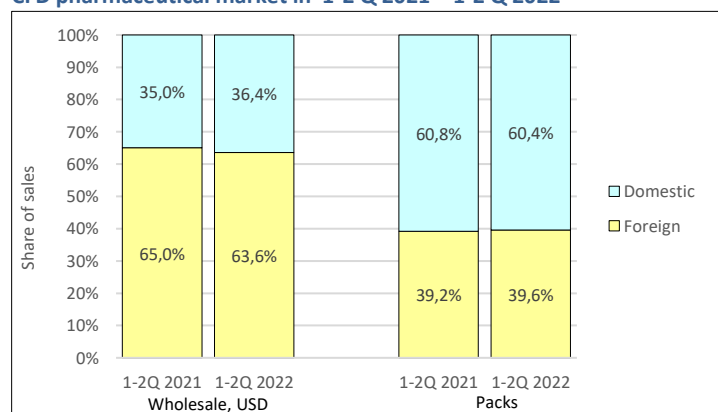


Figure 6. Changes in the Russian/ foreign drugs share in the structure of CFD pharmaceutical market in 1-2 Q 2021 – 1-2 Q 2022



* Here and elsewhere IQVIA's data are used

³ Exclusive of Moscow

PHARMACEUTICAL MARKET OF THE NORTH-WESTERN FEDERAL DISTRICT (NWFD) IN 1-2 Q 2022 KEY PERFORMANCE INDICATORS

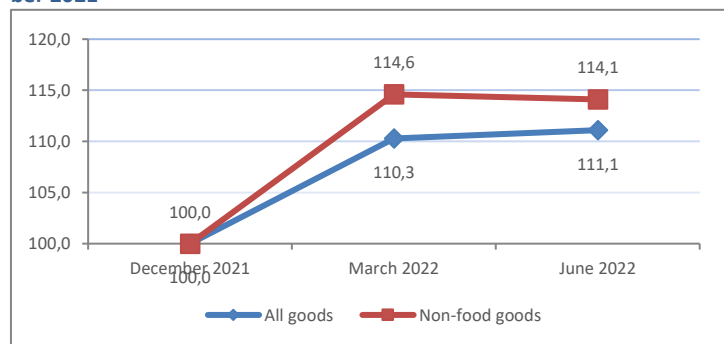
Macroeconomic indices

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

Value	December-June 2022	December-June 2022 (%) vs. December-June 2021
Industrial production index		102.4
Retail turnover, RUB bil.	2,130.9	96.5
Monthly average accrued wage per worker (nominal), RUB	69,331	112.4
real		98.4

Note: NWFD Territorial Body of Federal State Service data

Figure 1. Movement of price index and non-foods price index vs December 2021



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

Figure 1. Movement of weighted average purchase prices and retail margins in 1-2 Q 2021 – 1-2 Q 2022*

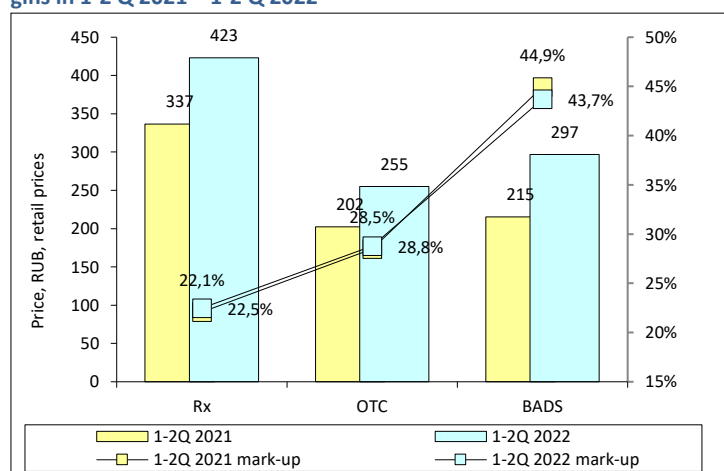
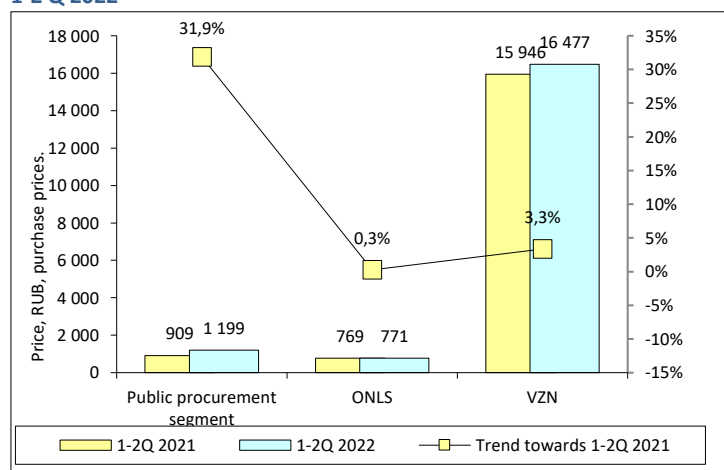


Figure 2. Movement of weighted average purchase prices, 1-2 Q 2021 – 1-2 Q 2022



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

Figure 3. NWFD pharmaceutical market in 1-2 Q 2021 – 1-2 Q 2022

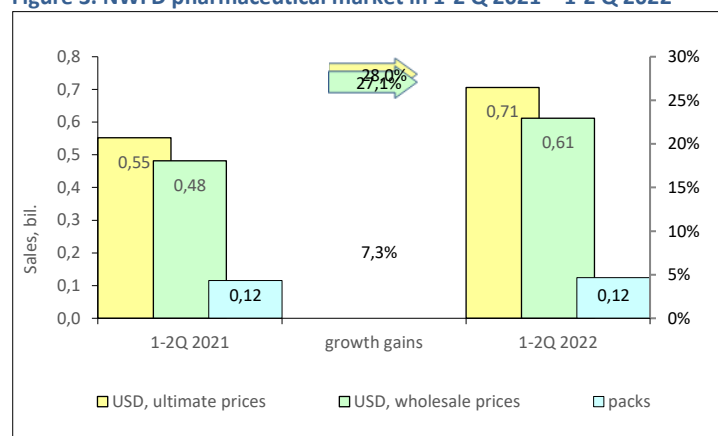


Figure 4. Structure of NWFD pharmaceutical market by major segments in 1-2 Q 2021 – 1-2 Q 2022

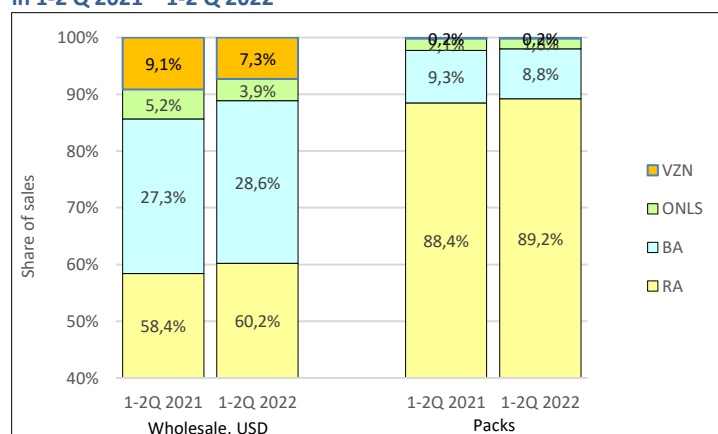


Figure 5. Structure of the retail segment of NWFD market in 1-2 Q 2021 – 1-2 Q 2022

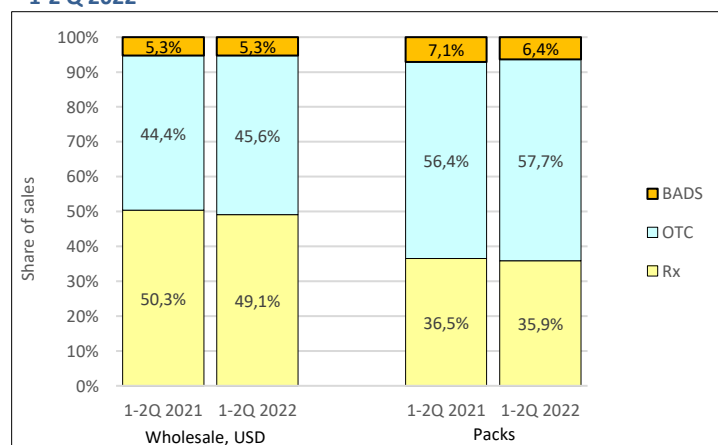
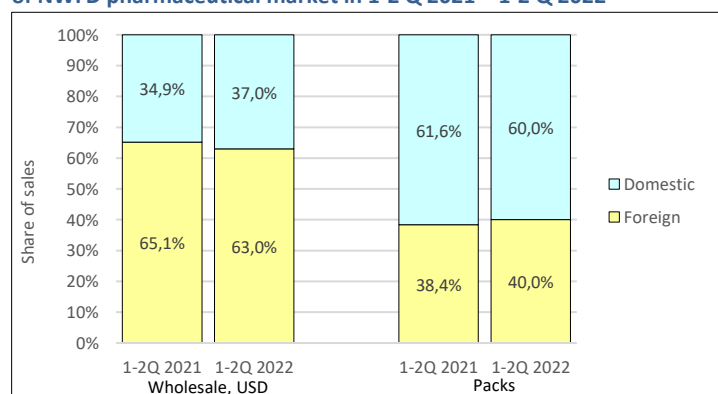


Figure 6. Movement of the Russian/ foreign drugs share in the structure of NWFD pharmaceutical market in 1-2 Q 2021 – 1-2 Q 2022



* Here and elsewhere IQVIA's data are used

⁴ Exclusive of St. Petersburg

PHARMACEUTICAL MARKET OF THE VOLGA FEDERAL DISTRICT (VFD) IN 1-2 Q 2022 KEY PERFORMANCE INDICATORS

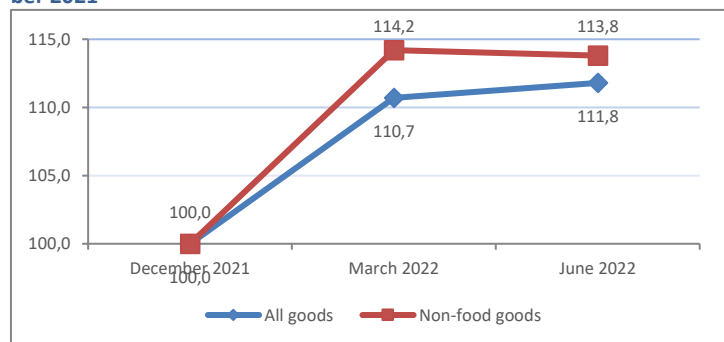
Macroeconomic indices

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

Value	December-June 2022	December-June 2022 (%) vs. December-June 2021
Industrial production index		100.7
Retail turnover, RUB bil.	3,501.8	97.2
Monthly average accrued wage per worker (nominal), RUB	44,281	112.8
real		98.1

Note: VFD Territorial Body of Federal State Service data

Figure 1. Movement of price index and non-foods price index vs December 2021



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

Figure 1. Movement of weighted average purchase prices and retail margins in 1-2 Q 2021 – 1-2 Q 2022*

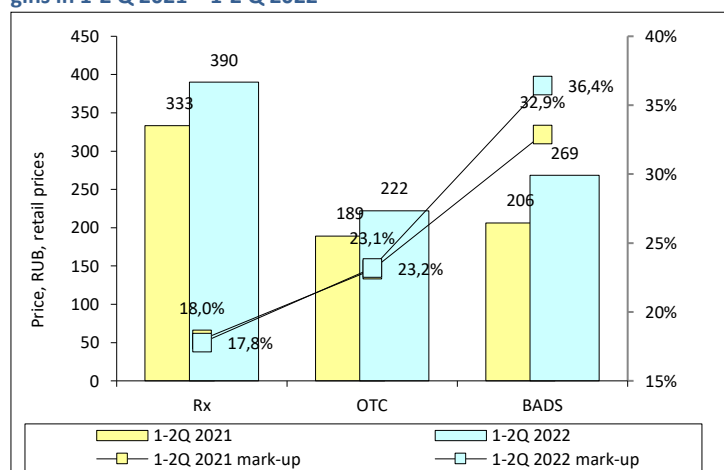
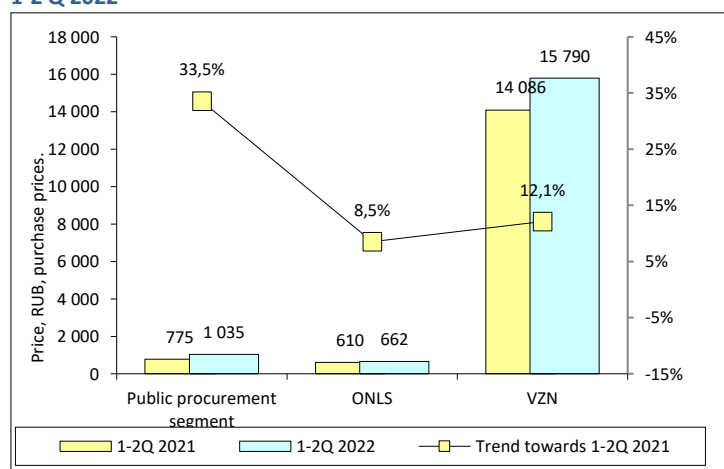


Figure 2. Movement of weighted average purchase prices, 1-2 Q 2021 – 1-2 Q 2022



* Here and elsewhere IQVIA's data are used

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

Figure 3. VFD pharmaceutical market in 1-2 Q 2021 – 1-2 Q 2022

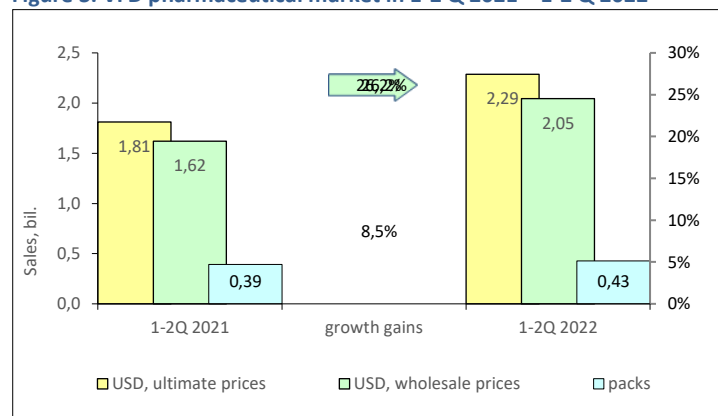


Figure 4. Structure of PFD pharmaceutical market by major segments in 1-2 Q 2021 – 1-2 Q 2022

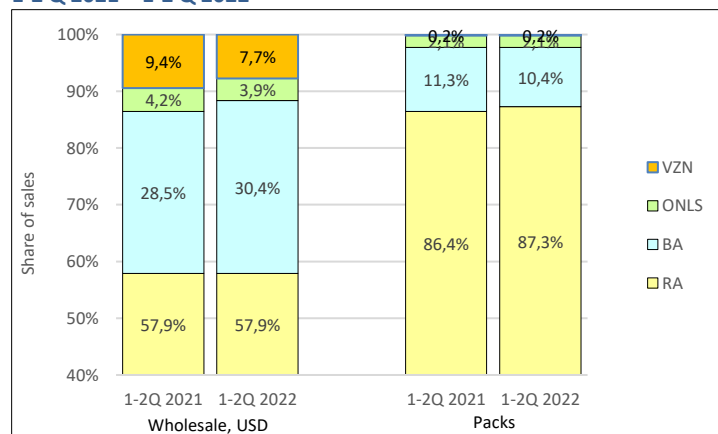


Figure 5. Structure of the retail segment of VFD pharmaceutical market in Q 1-2, 2021 – 1-2 Q 2022

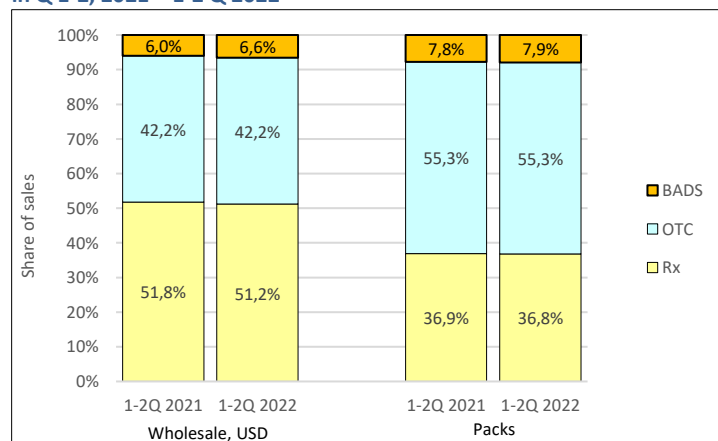
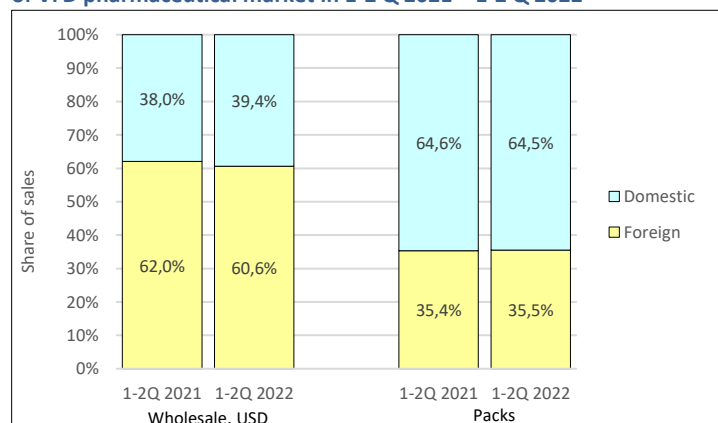


Figure 6. Movement of the Russian/foreign drugs share in the structure of VFD pharmaceutical market in 1-2 Q 2021 – 1-2 Q 2022



PHARMACEUTICAL MARKET OF THE URAL FEDERAL DISTRICT (UrFD) IN 1-2 Q 2022 KEY PERFORMANCE INDICATORS

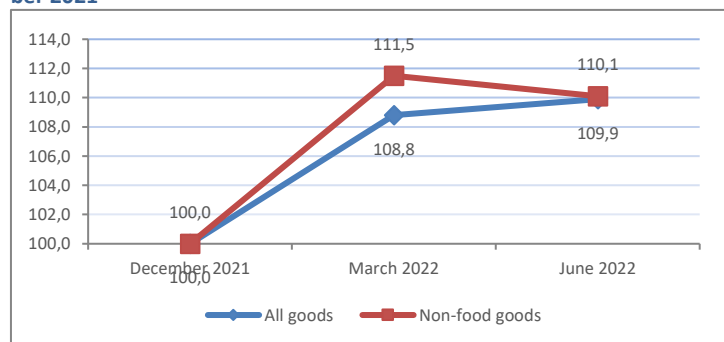
Macroeconomic indices

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

Value	December-June 2022	December-June 2022 (%) vs. December-June 2021
Industrial production index		101.3
Retail turnover, RUB bil.	1,624.0	96.1
Monthly average accrued wage per worker (nominal), RUB	65,367	111.1
real		99.2

Note: UrFD Territorial Body of Federal State Service data

Figure 1. Movement of price index and non-foods price index vs December 2021



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

Figure 1. Movement of weighted average purchase prices and retail margins in 1-2 Q 2021 – 1-2 Q 2022*

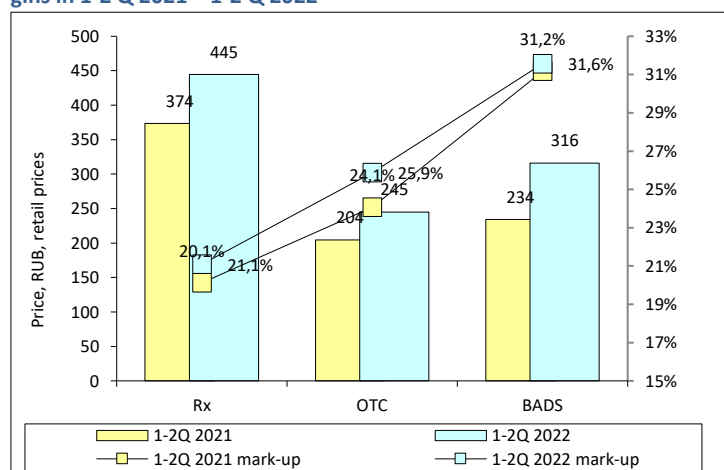
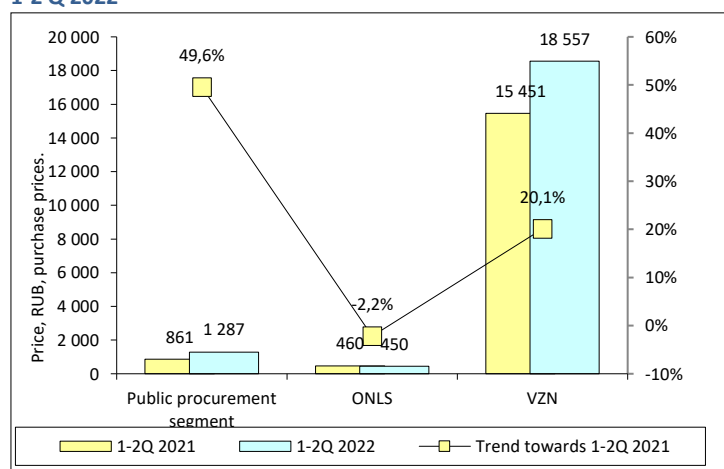


Figure 2. Movement of weighted average purchase prices, 1-2 Q 2021 – 1-2 Q 2022



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

Figure 3. UrFD pharmaceutical market in 1-2 Q 2021 – 1-2 Q 2022

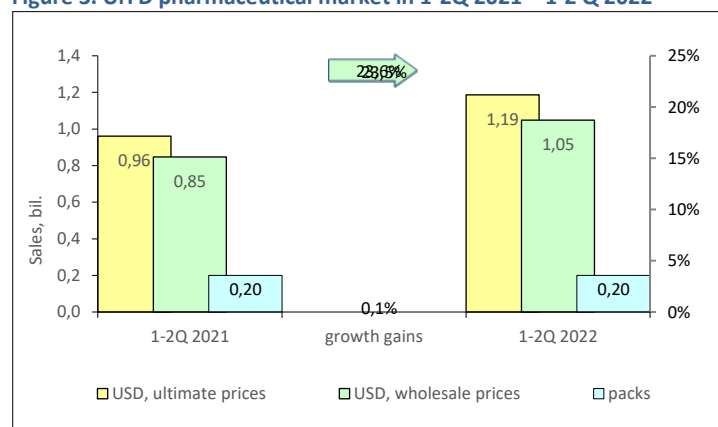


Figure 4. Structure of UrFD pharmaceutical market by major segments in 1-2 Q 2021 – 1-2 Q 2022

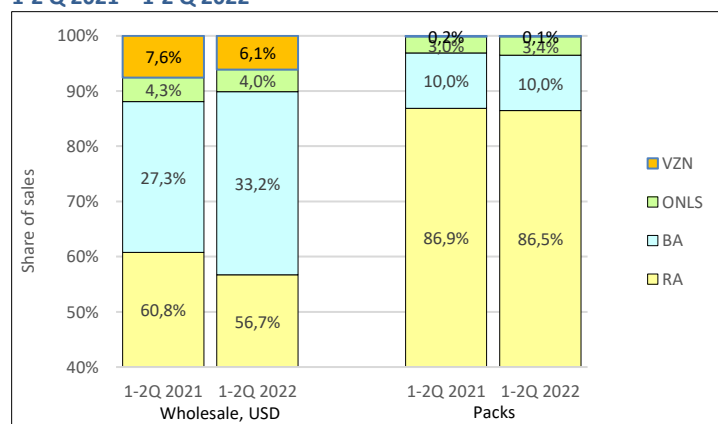


Figure 5. Structure of the retail segment of UrFD market in 1-2 Q 2021 – 1-2 Q 2022

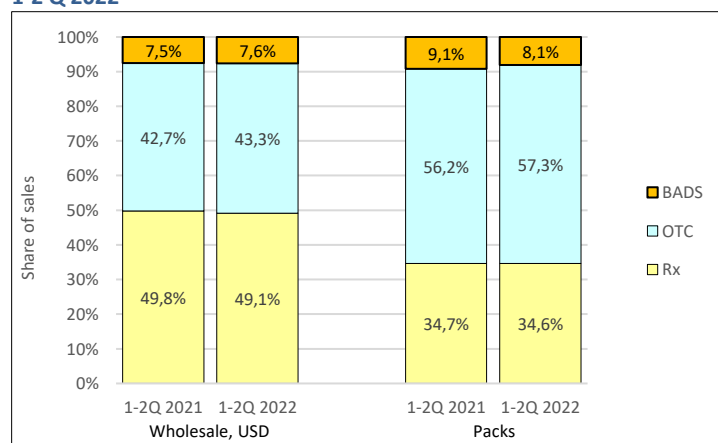
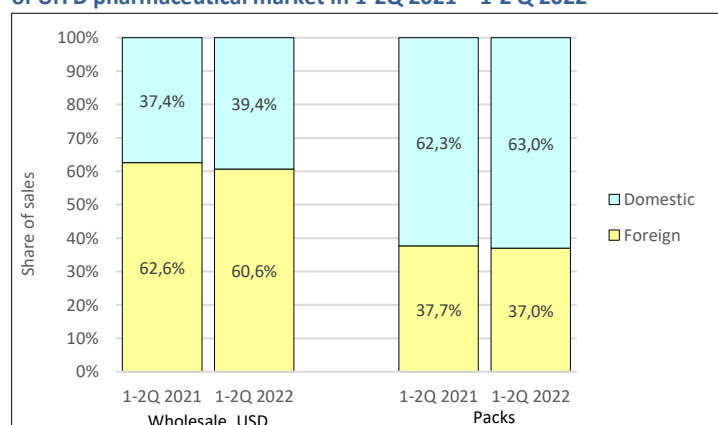


Figure 6. Movement of the Russian/ foreign drugs share in the structure of UrFD pharmaceutical market in 1-2 Q 2021 – 1-2 Q 2022



* Here and elsewhere IQVIA's data are used

PHARMACEUTICAL MARKET OF THE SIBERIAN FEDERAL DISTRICT (SiFD) IN 1-2 Q 2022 KEY PERFORMANCE INDICATORS

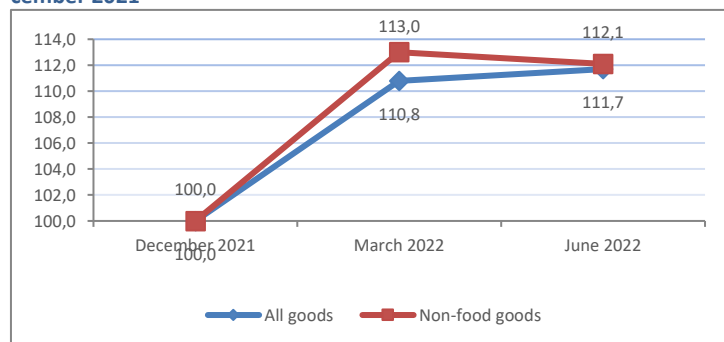
Macroeconomic indices

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

Value	December-June 2022	December-June 2022 (%) vs. December-June 2021
Industrial production index		102.8
Retail turnover, RUB bil.	1,866.4	101.4
Monthly average accrued wage per worker (nominal), RUB	53,824	114.1
real		98.8

Note: SiFD Territorial Body of Federal State Service data

Figure 1. Movement of the price index and non-foods price index vs December 2021



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

Figure 1. Movement of weighted average purchase prices and retail margins in 1-2 Q 2021 – 1-2 Q 2022*

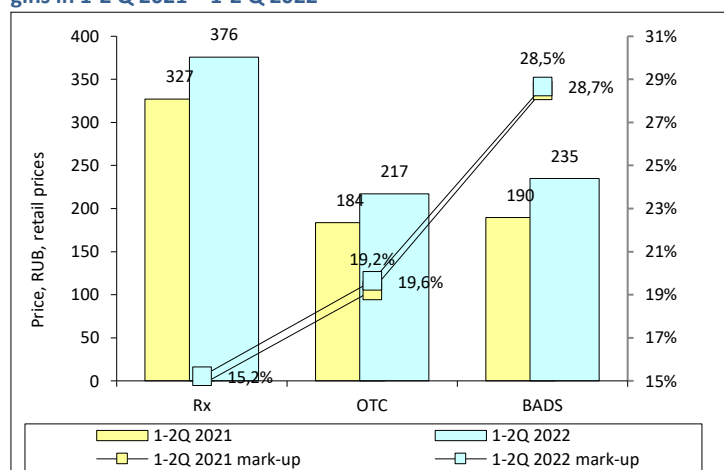
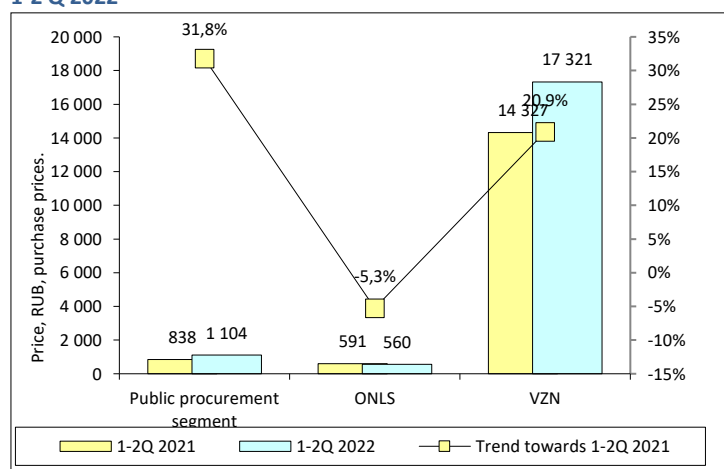


Figure 2. Movement of weighted average purchase prices, 1-2 Q 2021 – 1-2 Q 2022



* Here and elsewhere IQVIA's data are used

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

Figure 3. SFD pharmaceutical market in 1-2 Q 2021 – 1-2 Q 2022

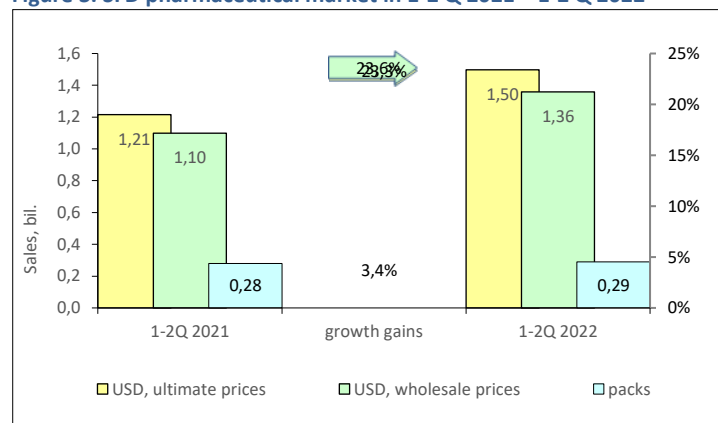


Figure 4. Structure of SiFD pharmaceutical market by major segments in 1-2 Q 2021 – 1-2 Q 2022

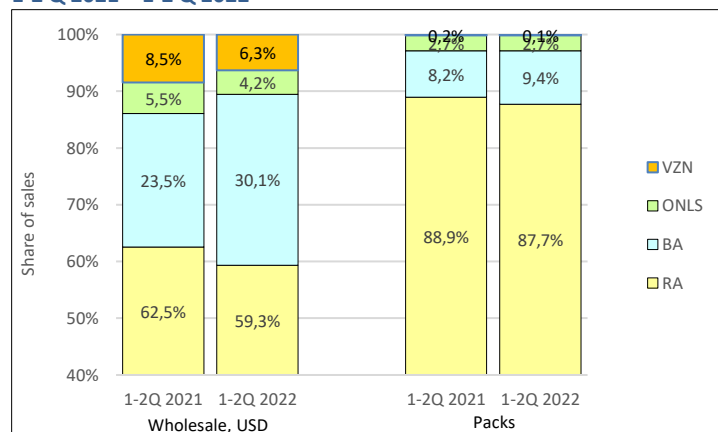


Figure 5. Structure of the retail segment of SiFD market in 1-2 Q 2021 – 1-2 Q 2022

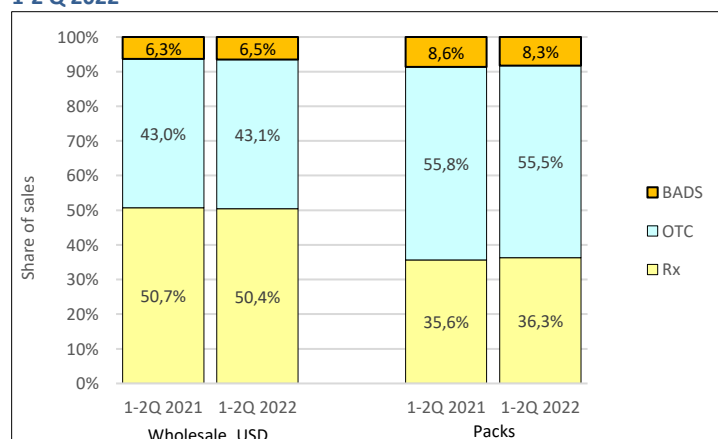
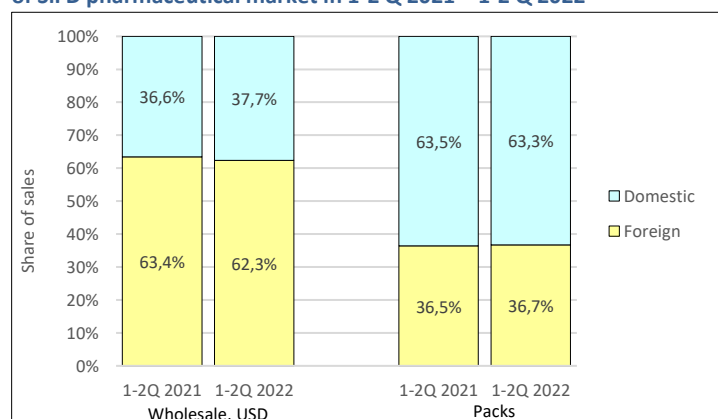


Figure 6. Movement of the Russian/ foreign drugs share in the structure of SiFD pharmaceutical market in 1-2 Q 2021 – 1-2 Q 2022



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

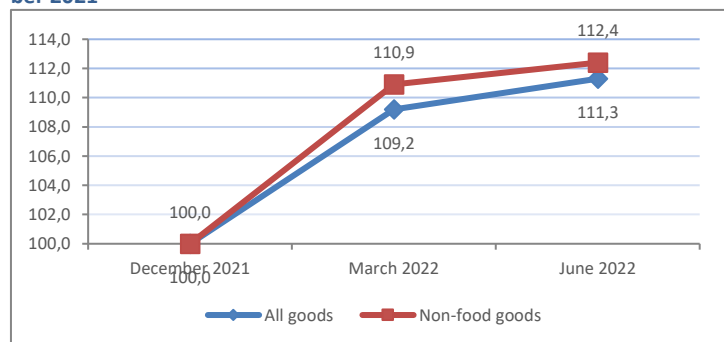
Macroeconomic indices

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

Value	December-June 2022	December-June 2022 (%) vs. December-June 2021
Industrial production index		100.5
Retail turnover, RUB bil.	2,207.2	97.3
Monthly average accrued wage per worker (nominal), RUB	42,883	111.2
real		97.4

Note: SoFD Territorial Body of Federal State Service data

Figure 1. Movement of price index and non-foods price index vs December 2021



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

Figure 1. Movement of weighted average purchase prices and retail margins in 1-2 Q 2021 – 1-2 Q 2022*

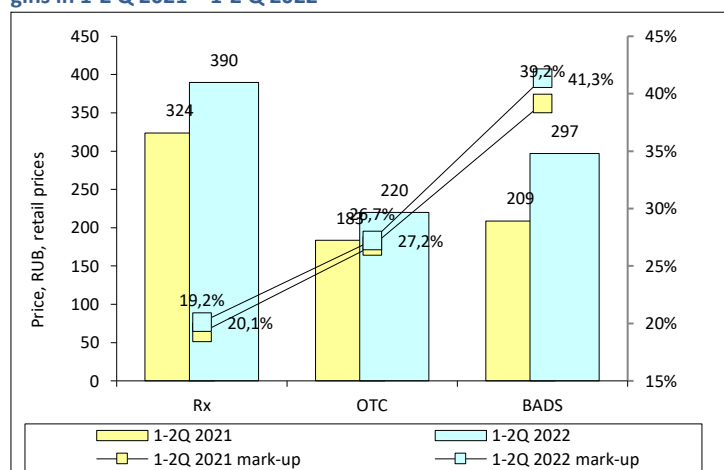
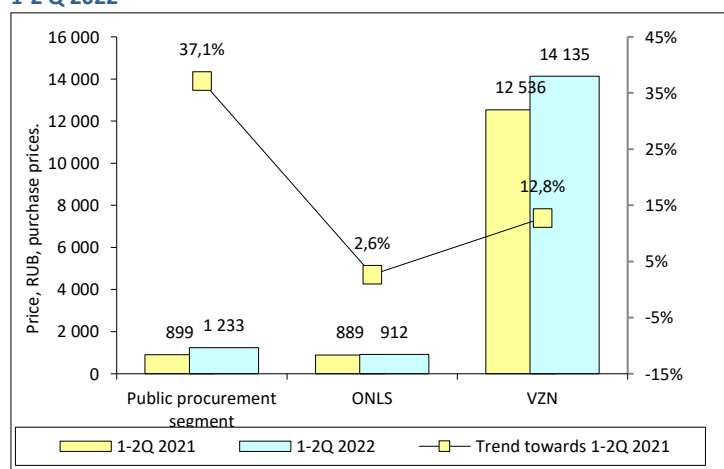


Figure 2. Movement of weighted average purchase prices, 1-2 Q 2021 – 1-2 Q 2022



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

Figure 3. SoFD pharmaceutical market in 1-2 Q 2021 – 1-2 Q 2022

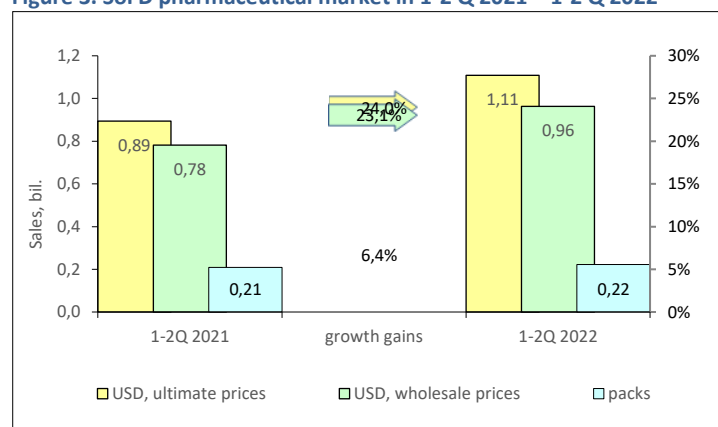


Figure 4. Structure of the SoFD pharmaceutical market by major segments in 1-2 Q 2021 – 1-2 Q 2022

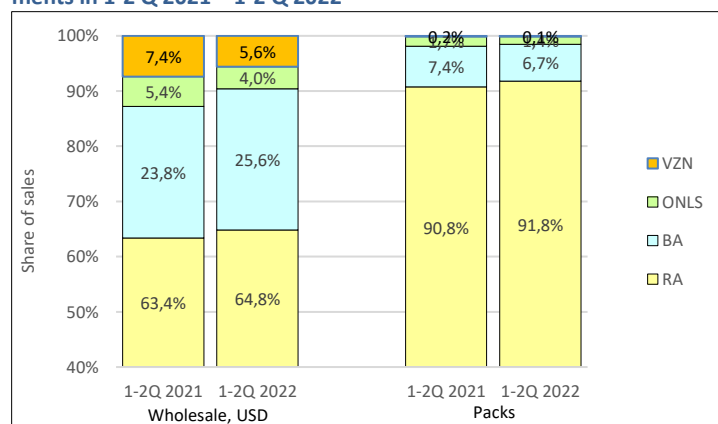


Figure 5. Structure of the retail segment of SoFD pharmaceutical market in 1-2 Q 2021 – 1-2 Q 2022

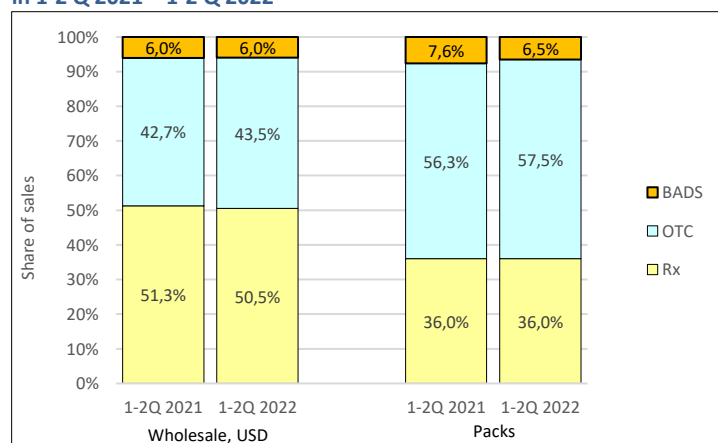
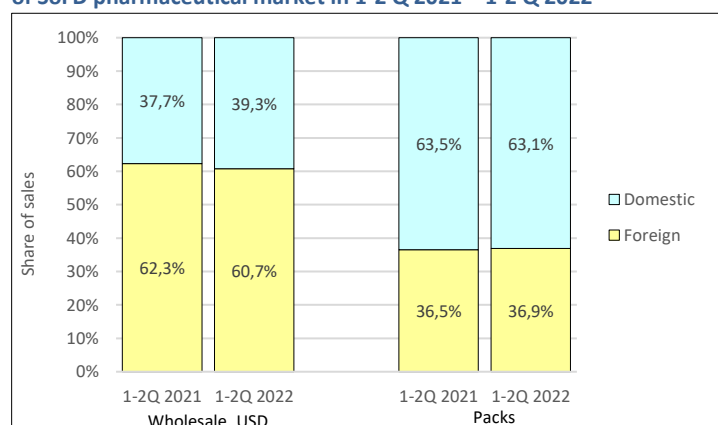


Figure 6. Movement of the Russian/foreign drugs share in the structure of SoFD pharmaceutical market in 1-2 Q 2021 – 1-2 Q 2022



* Here and elsewhere IQVIA's data are used

PHARMACEUTICAL MARKET OF THE FAR EASTERN FEDERAL DISTRICT (FEFD) IN 1-2 Q 2022. KEY PERFORMANCE INDICATORS

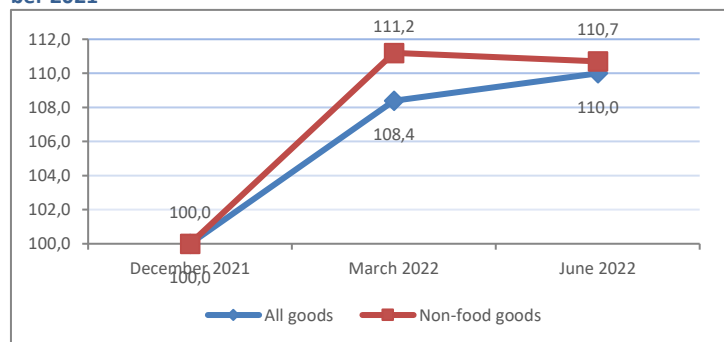
Macroeconomic indices

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

Value	December-June 2022	December-June 2022 (%) vs. December-June 2021
Industrial production index		99.0
Retail turnover, RUB bil.	1,147.3	99.6
Monthly average accrued wage per worker (nominal), RUB	71,131	111.1
real		98.7

Note: FEFD Territorial Body of Federal State Service data

Figure 1. Movement of price index and non-foods price index vs December 2021



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

Figure 1. Movement of weighted average purchase prices and retail margins in 1-2 Q 2021 – 1-2 Q 2022*

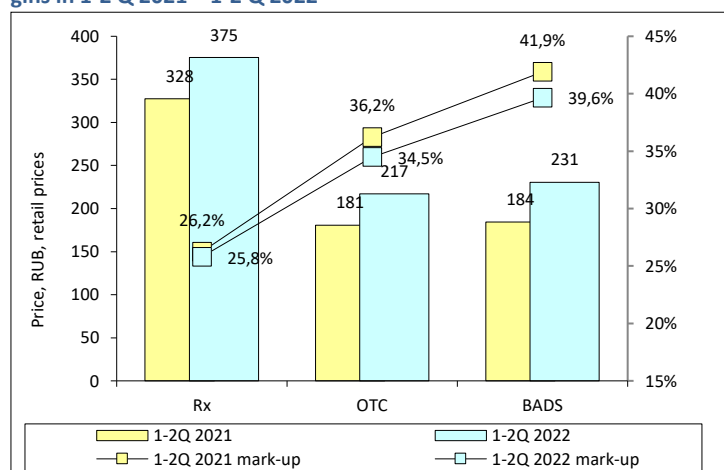
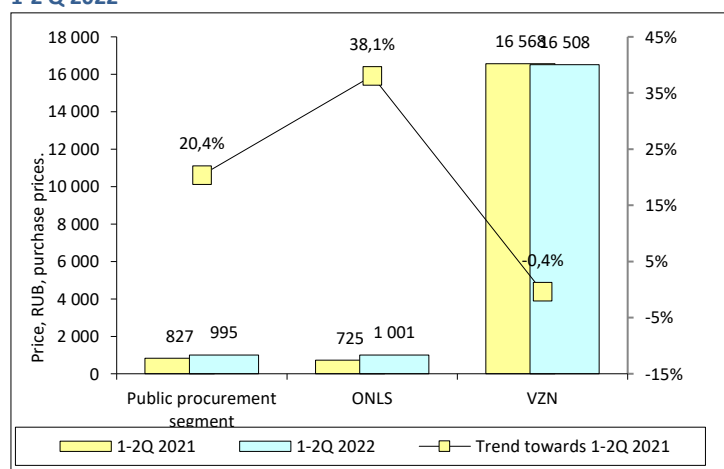


Figure 2. Movement of weighted average purchase prices, 1-2 Q 2021 – 1-2 Q 2022



* Here and elsewhere IQVIA's data are used

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

Figure 3. FEFD pharmaceutical market in 1-2 Q 2021 – 1-2 Q 2022

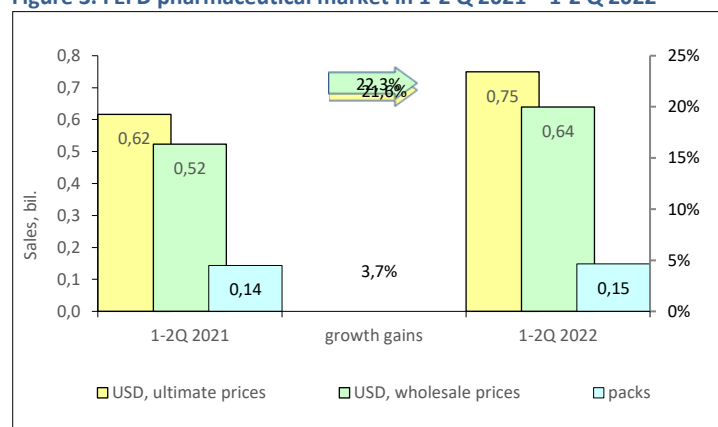


Figure 4. Structure of the FEFD pharmaceutical market by major segments in 1-2 Q 2021 – 1-2 Q 2022

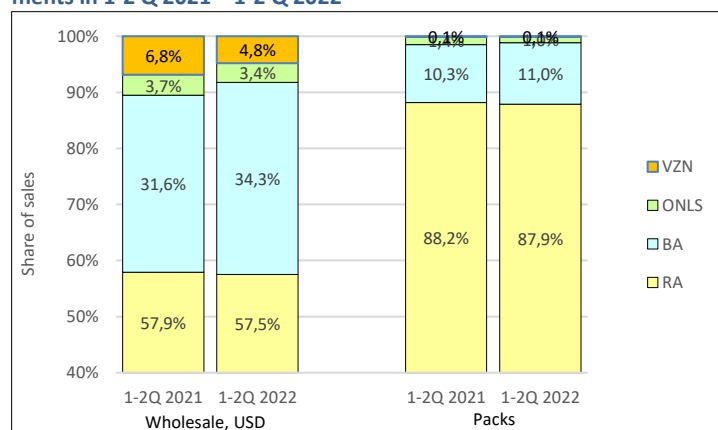


Figure 5. Structure of the retail segment of FEFD pharmaceutical market in 1-2 Q 2021 – 1-2 Q 2022

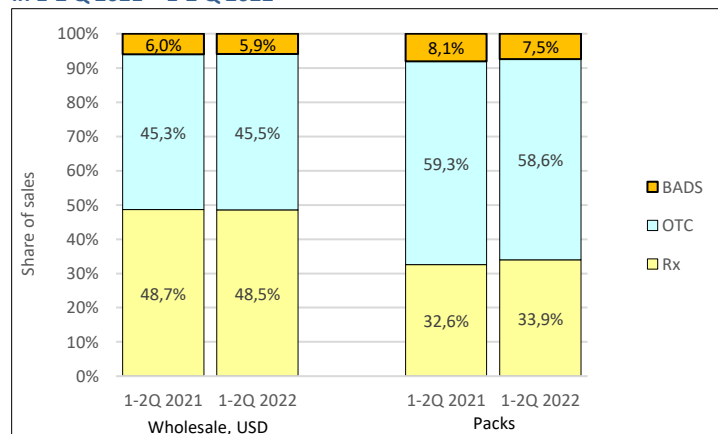


Figure 6. Movement of the Russian/foreign drugs share in the structure of FEFD pharmaceutical market in 1-2 Q 2021 – 1-2 Q 2022

