

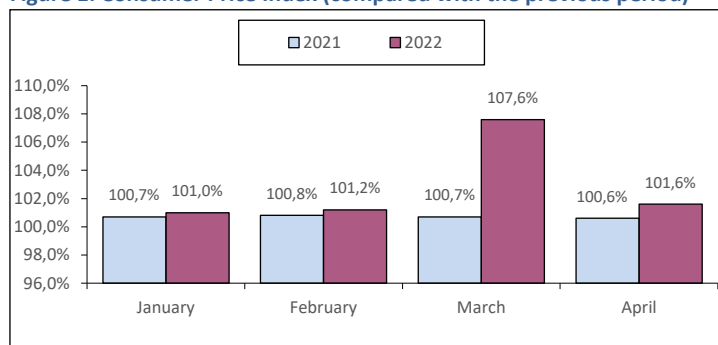
MACROECONOMIC INDICES

Inflation

According to Federal State Statistics Service's data, the Consumer Price Index was estimated at 101.6% in April 2022 as compared to the previous month, and 111.7% as against December 2021.

In April 2022, Industrial Producer Price Index was 106.3% as compared to the previous month, in the month-earlier period it had amounted to 106%. The index accounted for 117.1% as against December of 2021.

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



Living standard

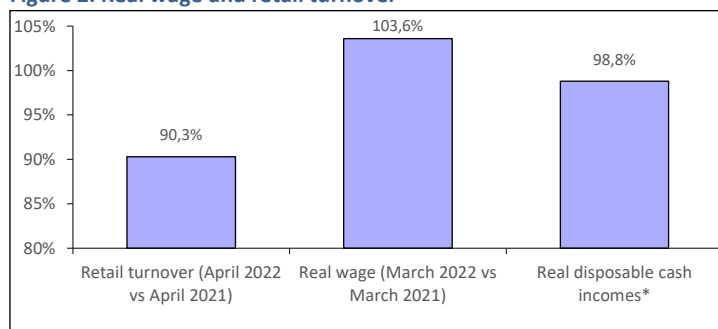
In March of 2022, a gross monthly average wage of corporate employees reached RUB 66757 (USD 643.88). It accounted for 120.9% as compared to March 2021, and 116.4% as compared to the previous period. In March of 2022, the real gross wage accounted for 103.6% as compared to March of 2021, and 108.2% against the prior period.

According to estimates¹, real disposable cash incomes decreased by 98.8% in the first half of 2022 as compared to the first half of 2021 (Fig. 2).

Retail turnover

In April 2022, the retail turnover was equal to RUB 3390.6 bil. or 90.3% (in comparable prices) against the respective period of the previous year, and RUB 13632.5 bil. or 100.1% in January - April 2022 (Fig. 2).

Figure 2. Real wage and retail turnover



* I Quarter 2022 vs I Quarter 2021

Industrial Production

According to Federal State Statistics Service's data, in April 2022 Industrial Production Index accounted for 98.4% compared to the same period of the previous year, and 103.9% in January-April 2022.

According to Federal State Statistics Service's data, Industrial Production Index for drugs and medical products in April 2022 accounted for 131.9% compared to the same period in 2021, and 128.2% in January-April 2022 as against January-April 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 April of 2022.

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

Rank	Manufacturer	RUB mil.
1	Biocad	3488.6
2	Promomed	3462.9
3	Pharmasyntez	2936.8
4	Stada	2234.4
5	Otcpharm	2234.1
6	Binnopharm	2019.5
7	Pharmstandart	1929.5
8	Sotex	1520.7
9	Generium	1475.2
10	Grotex	1430.3

Source - Remedium according to IQVIA's data

Table 2 provides pharmacy sales data from 10 regions of the Russian Federation. In March 2022 as compared to April 2022, growth in pharmacy sales (in terms of roubles) was reported in all analysed regions. The highest growth was observed in Moscow (+67%), the lowest one in Rostov Region (+20%).

Table 2. Pharmacy sales in the regions, 2022

Region	Pharmacy sales, \$ mil. (wholesale prices)			Growth gain, % (roubles)		
	January 2021	February 2022	March 2022	January 22/ December 21	February/January 22	March / February 22
Moscow	178.8	201.2	251.3	-22%	15%	67%
St. Petersburg	81.6	90.4	101.8	-21%	13%	51%
Krasnodar Krai	49.3	58.3	52.9	-17%	21%	22%
Krasnoyarsk Krai	25.7	28.2	26.4	-19%	12%	25%
Tatarstan	23.8	26.5	24.6	-20%	13%	25%
Rostov Region	28.8	33.1	29.7	-15%	17%	20%
Novosibirsk Region	25.2	28.0	26.5	-24%	13%	27%
Voronezh Region	16.5	20.0	20.0	-21%	23%	35%
Perm	9.7	10.3	10.4	-15%	8%	36%
Iyumen	8.5	9.9	10.2	-20%	19%	39%

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 2022

Rank	Company*	Quantity of broad-casts
1	Otcpharm	9,423
2	Dr. Reddy's Laboratories	9,039
3	Petrovax	5,833
4	Binnopharm	5,298
5	Stada	4,362

Source - Remedium according to Mediascope's data

Table 4. Top five brand names in mass media in April, 2022

Rank	Brand*	Quantity of broad-casts
1	Evalar	3,342
2	Pentalgin	2,586
3	Allerway	2,287
4	Cetrine	2,023
5	Afobazol	1,981

Source - Remedium according to Mediascope's data

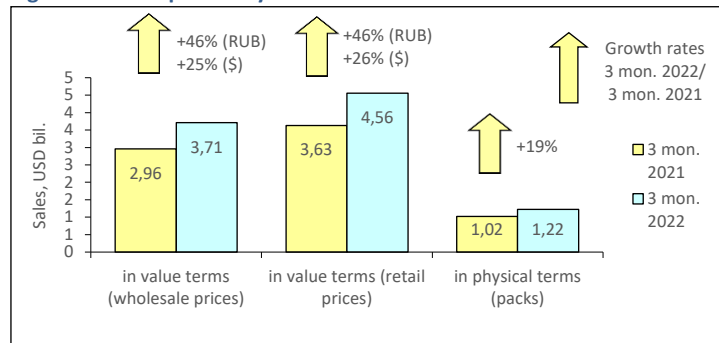
* Only drugs registered with National Medicine Register were considered.

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 THREE 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 three months of 2022 the sales of drugs in physical terms in the country saw a 19% increase to 1.219 bil. packs as compared to the same period of 2021. In money terms, the market increased by 46% in terms of roubles and 25% in terms of dollars. The volume of the market amounted to RUB 320.389 bil. (USD 3.710 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 3.74 in January-March of 2022 vs USD 3.55 in the first quarter of 2022. Consumer spending for drugs in Russia averaged to USD 31.33 in the first quarter of 2022, whereas during the same period a year ago it averaged to USD 24.85.

Figure 1. Russia pharmacy market for 3 months of 2021 – 3 months 2022*



Based on the results for the first three months of 2022, BAYER (+44%²) and SANOFI (+64%) continued to be the leading manufacturers in the Russian retail market according to the results for the first three months of 2022 (Table 1). In this respect, if the former reduced its market share a bit due to lagging rates, the latter, in contrast, expanded its market shares owing to the outstripping growth rates. The markets of another five manufacturers developed at a higher than market average pace. STADA (+52%), SERVIER (+60%), ABBOTT (+51%) and KRKA (+52%) moved up to ranks three, four, seven and eight, and the only newcomer GLAXOSMITHKLINE (+58%) broke into the top ten ranking, coming in at number eight. The less dynamic SANOFI (+32%), TEVA (+26%) and BERLIN-CHEMIE/MENARINI (+34%) moved down to ranks five and the last two ranks. The total share of the top ten manufacturers expanded by 0.3 p.p. compared to the same period of the previous year and accounted for 34.4%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten	3 mon. 2022	3 mon. 2021	Manufacturer*	Share in total pharmacy sales, %	
				3 mon. 2022	3 mon. 2021
1	1	1	BAYER	5.0	5.1
2	2	2	OTCPHARM	4.4	3.9
3	4	3	STADA	3.8	3.6
4	6	4	SERVIER	3.5	3.1
5	3	5	SANOFI	3.5	3.8
6	7	7	ABBOTT	3.1	3.0
7	8	8	KRKA	3.0	2.9
8	11	11	GLAXOSMITHKLINE	2.8	2.6
9	5	9	TEVA	2.7	3.2
10	9	10	BERLIN-CHEMIE/MENARINI	2.7	2.9
Total				34.4	34.1

*AIPM members are in bold

The antiviral drug ARBIDOL, which sales grew by 2.8 times in the analysed period, showed the largest sales and the highest growth rates among the leaders (Table 2). On top of that, it displaced the former leaders, antithrombotic agents XARELTO (+62%) and ELIQUIS (+96%), down one position despite their outstripping growth rates. Due to a 2.5-fold growth in purchases, one more antiviral drug INGAVIRIN moved up from rank nine to four. NUROFEN (+53%) moved up one position, coming in at number seven. The newcomers THERAFLU (2.1-fold growth) and CARDIOMAGNYL (+70%) that broke into the top 10 ranking demonstrated some growth, coming in at numbers six and ten respectively. At the same time, the brands DETRALEX (+64%), HEPTRAL (+36%) and CONCOR (+47%) moved down to the lower ranks five, eight and nine, respectively. The total share of the top 10 increased from 7.7% to 9.9%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten	3 mon. 2022	3 mon. 2021	Brand	Share in total pharmacy sales, %	
				3 mon. 2022	3 mon. 2021
1	3	3	ARBIDOL	2.0	1.0
2	1	1	XARELTO	1.6	1.5
3	2	2	ELIQUIS	1.4	1.0
4	9	9	INGAVIRIN	1.0	0.6
5	4	4	DETRALEX	0.8	0.7
6	14	14	THERAFLU	0.7	0.5

* Hereinafter IQVIA data

Rank in the top ten		Brand	Share in total pharmacy sales, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
7	8	NUROFEN	0.6	0.6
8	5	HEPTRAL	0.6	0.7
9	7	CONCOR	0.6	0.6
10	11	CARDIOMAGNYL	0.6	0.5
Total			9.9	7.7

The three leaders of the top ten INNs and grouping names ranking is consistent with that of the top ten ranking (Table 3). It includes UMIFENOVIR (2.9-fold growth in sales) and APIXABAN (+96%), which moved up to ranks one and three, as well as RIVAROXABAN (+62%), which held its previous rank two. The other three INNs from the top 10 INNs and grouping names ranking managed to rise in the ranks. IBUPROFEN (+50%), ROSUVASTATIN (+73%) and IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID (2.5-fold growth) moved up to ranks six through eight, respectively. On top of that, the latter became the only newcomer of the top 10 ranking. In contrast, INNs XYLOMETAZOLINE (+31%) and BISOPROLOL (+36%), as well as the composition DIOSMIN*HESPERIDIN (+51%) moved down to the lower ranks. And only NIMESULIDE (+45%) continued holding rank nine. The total share of the top-ten INNs and grouping names increased from 10.5% to 12.6%.

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

Rank in the top ten	3 mon. 2022	3 mon. 2021	INN/Grouping name	Share in total public segment, %	
				3 mon. 2022	3 mon. 2021
1	3	3	UMIFENOVIR	2.2	1.1
2	2	2	RIVAROXABAN	1.6	1.5
3	5	5	APIXABAN	1.4	1.0
4	1	1	XYLOMETAZOLINE	1.4	1.5
5	4	4	DIOSMIN*HESPERIDIN	1.1	1.1
6	8	8	IBUPROFEN	1.0	1.0
7	10	10	ROSUVASTATIN	1.0	0.8
8	20	20	IMIDAZOLYL ETHANAMIDE PENTANDIOIC ACID	1.0	0.6
9	9	9	NIMESULIDE	0.9	0.9
10	7	7	BISOPROLOL	0.9	1.0
Total				12.6	10.5

J05 Antivirals for systemic use (2.4-fold growth in sales) has become the best-selling and dynamic group in the top ATC groups ranking based on the results for 3 months of 2022 (Table 4). On top of that, it displaced the former leaders C09 Agents acting on the rennin-angiotensin system (+53%), B01 Antithrombotic agents (+57%) and M01 Anti-inflammatory and antirheumatic products (+41%) down one rank. The superior performance and growth rates were demonstrated by the groups G03 Sex hormones (+56%) and N02 Analgesic (+51%), which moved up one rank, coming in at numbers five and seven, as well as by the newcomers R05 Cough and cold preparations (+67%) and A10 Drugs used in diabetes (+83%) that broke into the top ten ranking for the first time. Due to considerable lagging rates, R01 Nasal preparations (+35%) moved down from rank four to six. The group N06 Psychoanaleptics (+45%) held its previous rank nine. In total, the top ten ATC groups accumulated 40.1%, whereas in the year-earlier period — 36.4%.

Table 4. The top ten ATC Groups by pharmacy sales

Rank in the top ten	3 mon. 2022	3 mon. 2021	ATC code	ATC group	Share in total pharmacy sales, %	
					3 mon. 2022	3 mon. 2021
1	5	5	J05	ANTIVIRALS FOR SYSTEMIC USE	5.8	3.6
2	1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.7	5.4
3	2	2	B01	ANTITHROMBOTIC AGENTS	5.1	4.8
4	3	3	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.5	4.7
5	6	6	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.7	3.5
6	4	4	R01	NASAL PREPARATIONS	3.4	3.6
7	8	8	N02	ANALGESICS	3.2	3.1
8	12	12	R05	COUGH AND COLD PREPARATIONS	3.1	2.7
9	9	9	N06	PSYCHOANALEPTICS	2.9	2.9
10	20	20	A10	DRUGS USED IN DIABETES	2.7	2.1
Total					40.1	36.4

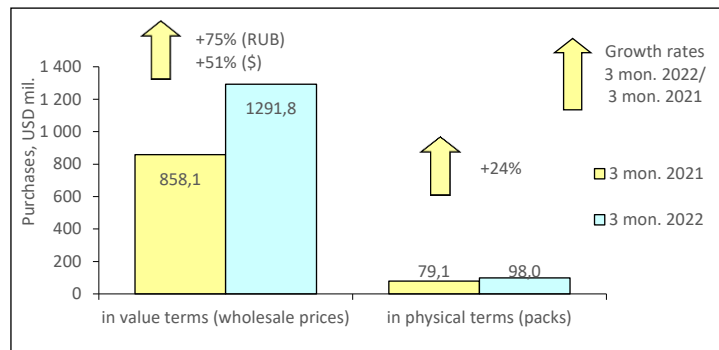
Conclusion. In January-March of 2022, the retail pharmacy market of the country stood at RUB 393.730 bil. (USD 4.560 bil.). As compared with the same period of 2021, the growth rates were positive and high both in terms of roubles (+46%), and in terms of dollars (+26%). In pack terms, the market increased by 19% compared to the previous year and amounted to 1.219 bil. packs. In the first quarter of 2022, the average cost of an FPP pack in the national pharmacies was USD 3.74, whereas in the year-earlier period it was USD 3.55. The average expenses of the Russian Federation residents for purchase of drugs in the pharmacies based on the results for the first three months of 2022 increased as compared to 2021 (USD 31.33 vs. USD 24.85).

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

RUSSIAN FEDERATION HOSPITAL MARKET: 2022 FIRST THREE MONTHS RESULTS

According to the results of the IQVIA Budget Audit of Finished Pharma Products (FFP) in the Russian Federation (without DLO and regional benefit)TM, in the first quarter of 2016 the public procurement segment of the country in physical terms increased as compared to the same period of the previous year (+24%) 24% and amounted to 97.959 mil. packs. In value terms, the market expanded by 75% in terms of roubles and 51% in terms of dollars and reached RUB 111.395 bil. (USD 1.292 bil.) at wholesale prices. Based on the results for January-March 2022, the average price per FFP pack in the hospital sector of the country was USD 13.19, whereas in the year-earlier period its price was USD 10.85.

Figure 1. Russia's public procurement sector for 3 months of 2021 – 3 months 2022*



In January-March of 2022, half of the top ten manufacturers showed a manifold growth in purchases in the public procurement sector (Table 1). The newcomers PHARMASYNTEZ (4.9-fold growth in purchases) and PROMOMED (4.7-fold growth) reported the largest growth rates, moving up to ranks five and six, respectively. The leaders of the top ten ranking BIOCAD (2.6-fold growth) and MSD (2.1-fold growth), as well as ASTRAZENCA (2.2-fold growth), which held its previous rank nine, has more than doubled the growth. R-PHARM and NOVARTIS, which showed a 71% growth in purchases, lost one rank each and moved down to ranks three and eight, respectively. BRISTOL MYERS (+26%) lost one rating point. The last year leader ROCHE (+19%) only moved to rank four. Despite the outstripping rates, BAYER (+78%) moved down to the bottom rank from eight. In total, the top ten manufacturers accounted for 51.3% of the public procurement segment against 44.9% in a year earlier period, according to the results for the first quarter of 2022.

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

Rank in the top ten		Manufacturer*	Share in total public segment, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	4	BIOCAD RF	9.4	6.2
2	5	MSD	7.1	5.8
3	2	R-PHARM ZAO RF	6.3	6.5
4	1	ROCHE	5.6	8.2
5	12	PHARMASYNTEZ	4.7	1.7
6	14	PROMOMED	4.2	1.6
7	6	BRISTOL MYERS	4.0	5.5
8	7	NOVARTIS	3.9	4.0
9	9	ASTRAZENECA	3.2	2.6
10	8	BAYER	2.9	2.9
Total			51.3	44.9

*AIPM members are in bold

Five newcomers broke into the ranks of the top ten ranking (Table 2). ILSIRA (9.6-fold growth in purchases) moved up to rank number one, as well as ESPERAVIR (30-fold growth), ARBIDOL (4.7-fold growth) and REMDEFORM (119-fold growth) moved up to ranks six through nine, respectively. CORONAVIR and ZOLGENSMA (2.2-fold growth) showed a more than two times growth in purchases, which allowed them to hold and reinforce their ranks four and ten, respectively. KEYTRUDA (+54%) held its previous rank two. At the same time, OPDIVO (+25%) and ARTLEGIA (+37%), which showed relatively low rates, lost two ranks each, moving down to ranks three and five. The total share of the top 10 brands in the public segment expanded from 18.5% to 29%.

Table 2. The top 10 brands by public segment volume

Rank in the top ten		Brand	Share in total public segment, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	17	ILSIRA	5.5	1.0
2	2	KEYTRUDA	3.8	4.3
3	1	OPDIVO	3.4	4.7
4	4	CORONAVIR	3.2	2.6
5	3	ARTLEGIA	2.8	3.6
6	N/A	ESPERAVIR	2.6	N/A
7	39	TIVICAY	2.1	0.1
8	20	ARBIDOL	2.0	0.8

* Hereinafter IQVIA data

Rank in the top ten		Brand	Share in total public segment, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
9	40	REMDEFORM	1.8	0.0
10	10	ZOLGENSMA	1.8	1.4
Total			29.0	18.5

The updates have been significant for the top ten INNs and grouping names ranking. Six newcomers broke into the ranks of the top ten ranking (Table 3). LEVILIMAB (9.6-fold growth in purchases), MOLNUPIRAVIR and UMIFENOVIR (4.7-fold growth) moved up to ranks two, four and six, respectively. Another three newcomers, DOLUTEGRAVIR (30-fold growth), REMDESIVIR (32-fold growth) and ONASEMNOGENE ABEPARVOVEC (2.2-fold growth) close the top ten ranking. FAVIPRAVIR, which increased the purchases by 2.7 times and moved up to rank two, became the leader of the top ten ranking. The former top 10 leader NIVOLUMAB (+25%) moved down to rank five. OLOKIZUMAB (+37%) moved down three ranks. INN PEMBROLIZUMAB (+54%) managed to hold its previous rank three. The total share accumulated by the top-ten INNs and grouping names increased from 20.7% to 34.3%.

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 segment, %	
3 mon. 2022	3 mon. 2021		3 mon. 2022	3 mon. 2021
1	2	FAVIPRAVIR	6.9	4.4
2	21	LEVILIMAB	5.5	1.0
3	3	PEMBROLIZUMAB	3.8	4.3
4	N/A	MOLNUPIRAVIR	3.4	N/A
5	1	NIVOLUMAB	3.4	4.7
6	19	UMIFENOVIR	2.8	1.0
7	4	OLOKIZUMAB	2.8	3.6
8	40	DOLUTEGRAVIR	2.1	0.1
9	41	REMDESIVIR	1.8	0.1
10	13	ONASEMNOGENE ABEPARVOVEC	1.8	1.4
Total			34.3	20.7

L01 Antineoplastic agents (+26%) held their previous rank number one in the top ten ATC groups ranking, despite its lagging rates and reduction of the market share (Table 4). J05 Antivirals for systemic use (5.5-fold growth in purchases) and L04 Immunosuppressants (2.4-fold growth) moved up to ranks two and three from five and four. In addition to them, M09 Other drugs for disorders of the musculo-skeletal system (2.2-fold growth) and J06 Immune sera and immunoglobulins (3.5-fold growth), which moved up to ranks six and eight, showed an exponential growth. On top of that, the latter became the only newcomer of the top ten ranking. At the same time, the less dynamic B01 Antithrombotic agents (+36%) and L02 Endocrine therapy (+14%), as well as J01 Antibacterials for systemic use (-8%) and J07 Vaccines (-14%) moved down to ranks four, ten, five and nine, respectively. B05 Blood substitutes and perfusion solutions (+40%) still holds rank seven. The total share of the top ten ATC groups increased by just over 1 p.p. and reached 84.6%.

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 segment, %	
3 mon. 2022	3 mon. 2021			3 mon. 2022	3 mon. 2021
1	1	L01	ANTINEOPLASTIC AGENTS	25.7	35.5
2	5	J05	ANTIVIRALS FOR SYSTEMIC USE	23.4	7.4
3	4	L04	IMMUNOSUPPRESSANTS	11.7	8.6
4	3	B01	ANTITHROMBOTIC AGENTS	6.7	8.7
5	2	J01	ANTIBACTERIALS FOR SYST USE	4.6	8.8
6	9	M09	OTHER DRUGS FOR DISORD. OF THE MUSCULO-SKELET.SYST	3.2	2.5
7	7	B05	PLASMA SUBSTITUTES AND PERFUSION SOLUTIONS	2.5	3.1
8	11	J06	IMMUNE SERA & IMMUNO-GLOBULIN	2.5	1.2
9	6	J07	VACCINES	2.4	4.9
10	8	L02	ENDOCRINE THERAPY	1.8	2.8
Total				84.6	83.5

Conclusion. Based on the results for the first three months of 2022, the public procurement sector of Russia expanded by 75% in rouble terms and by 51% in dollar terms and stood at RUB 111.395 bil. (USD 1.292 bil.). In pack terms, the market reduced by 24% and amounted to 97.959 mil. packs. At the end of the first quarter 2022, the average cost of a finished pharma product (FFP) pack in the national public procurement sector amounted to USD 13.19 vs. USD 10.85 in the year earlier period.

PHARMACEUTICAL MARKET OF THE CENTRAL FEDERAL DISTRICT (CFD) IN the first quarter of 2022 KEY PERFORMANCE INDICATORS

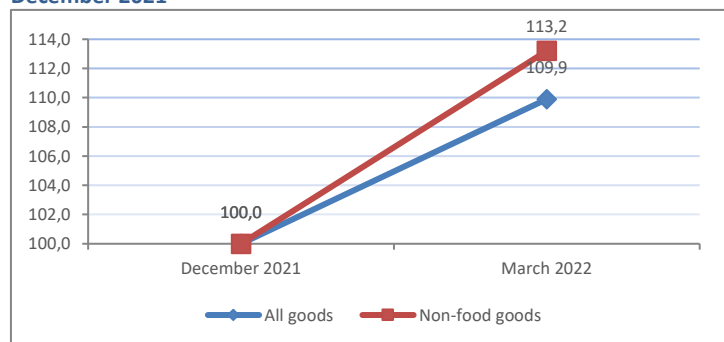
Macroeconomic indices

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

Value	December-March 2022	December-March 2022 (%) vs. December-March 2021
Industrial production index		114.0
Retail turnover, RUB bil.	3,601.3	103.0
Monthly average accrued wage per worker (nominal), RUB	78,718	117.5
real		105.4

Note: CFD Territorial Body of Federal State Service data

Figure 1. Movement of price index and non-food goods 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 prices and retail margins in 1 Q 2021 - Q 1 2022*

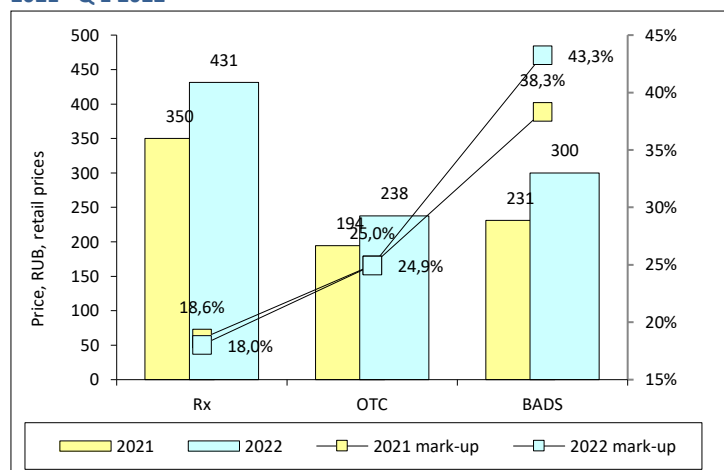
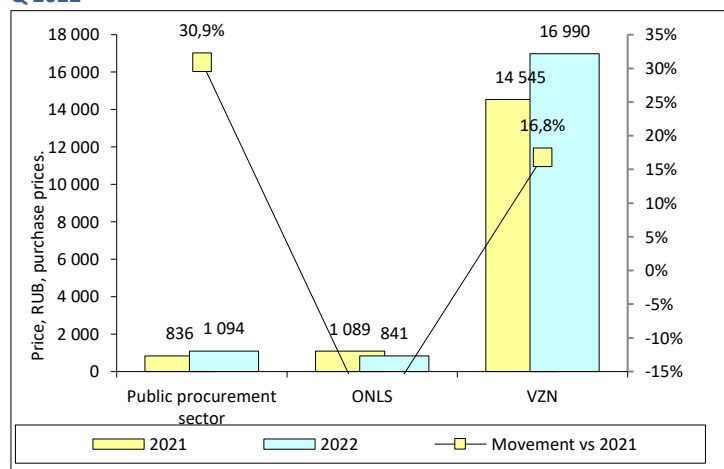


Figure 2. Movement of weighted average purchase prices in 1 Q 2021 - 1 Q 2022



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

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

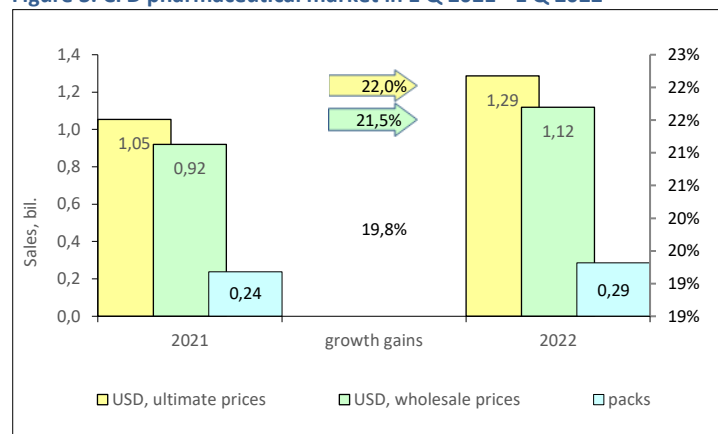


Figure 4. Structure of CFD pharmaceutical market by major segments in 1 Q 2021 - 1 Q 2022

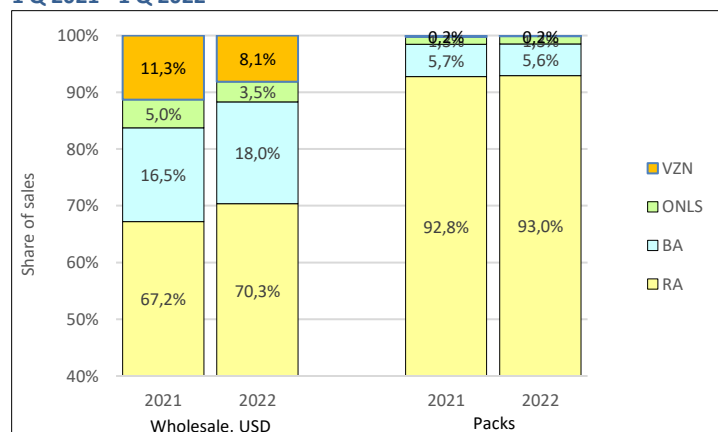


Figure 5. Structure of the retail segment of CFD market in 1 Q 2021 - 1 Q 2022

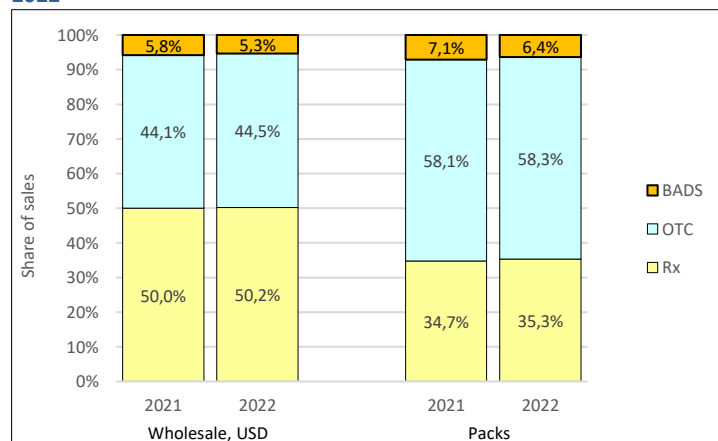
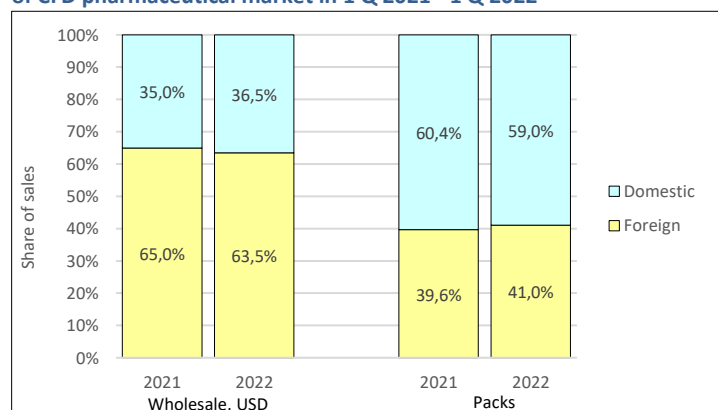


Figure 6. Movement of the Russian/foreign drugs share in the structure of CFD pharmaceutical market in 1 Q 2021 - 1 Q 2022



* Hereinafter IQVIA data

³ Exclusive of Moscow

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

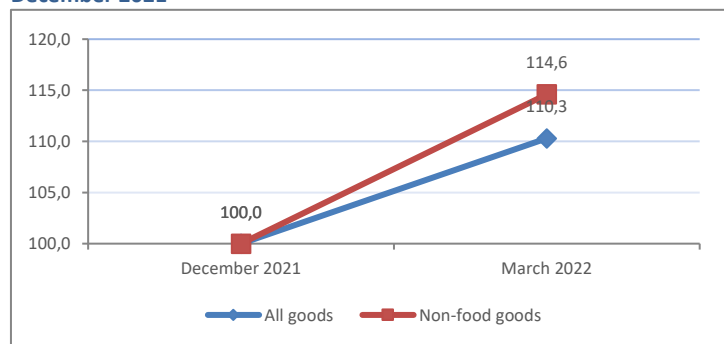
Macroeconomic indices

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

Value	December-March 2022	December-March 2022 (%) vs. December-March 2021
Industrial production index		105.9
Retail turnover, RUB bil.	1,081.5	105.7
Monthly average accrued wage per worker (nominal), RUB	67,422	114.1
real		102.1

Note: NWFD Territorial Body of Federal State Service data

Figure 1. Movement of price index and non-food goods 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 prices and retail margins in 1 Q 2021 - 1 Q 2022*

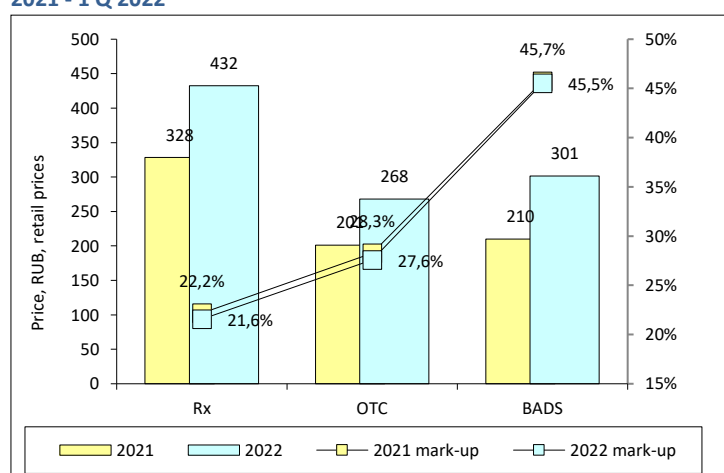
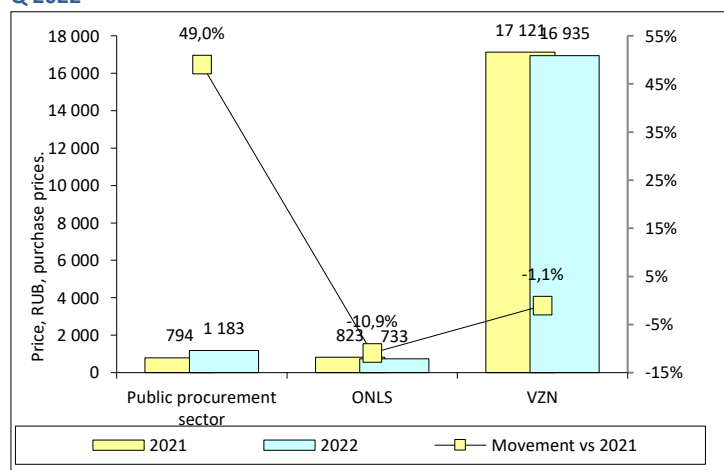


Figure 2. Movement of weighted average purchase prices in 1 Q 2021 - 1 Q 2022



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

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

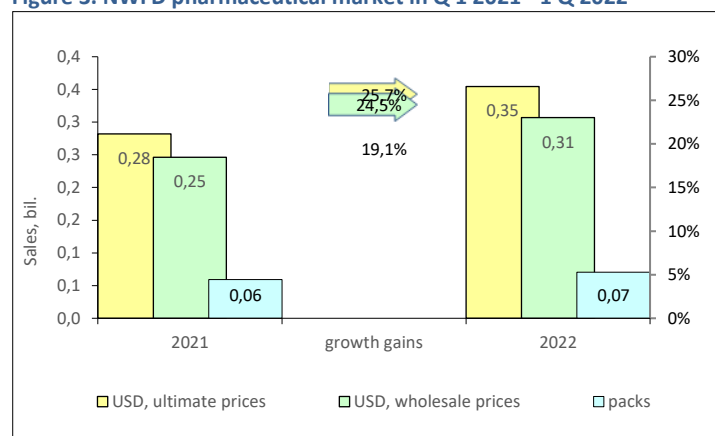


Figure 4. Structure of the NWFD pharmaceutical market by major segments in 1 Q, 2021 - 1 Q 2022

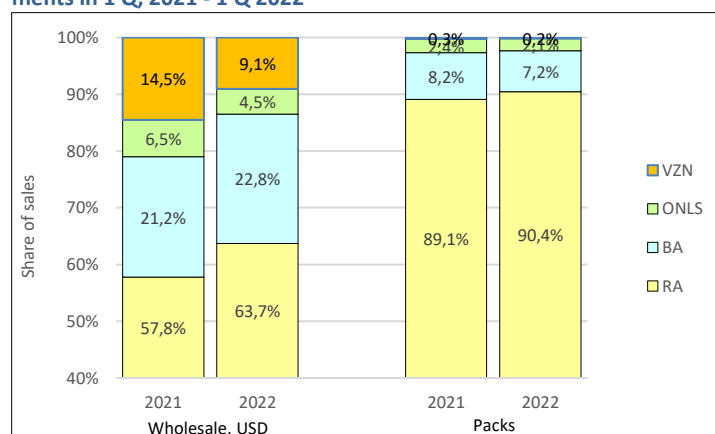


Figure 5. Structure of the retail segment of NWFD pharmaceutical market in 1 Q 2021 - 1 Q 2022

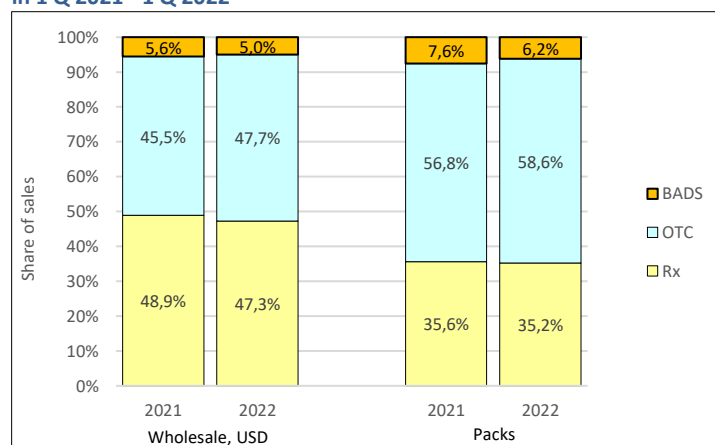
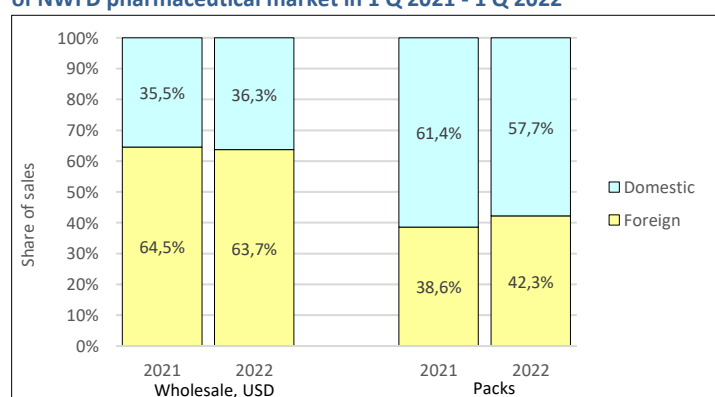


Figure 6. Movement of the Russian/ foreign drugs share in the structure of NWFD pharmaceutical market in 1 Q 2021 - 1 Q 2022



* Hereinafter IQVIA data

⁴ Exclusive of St. Petersburg

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

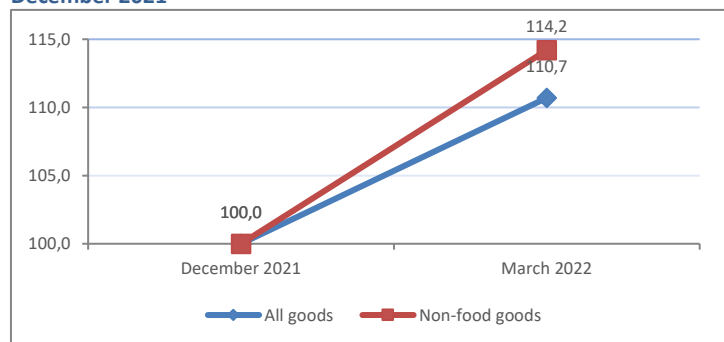
Macroeconomic indices

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

Value	December-March 2022	December-March 2022 (%) vs. December-March 2021
Industrial production index		106.4
Retail turnover, RUB bil.	1,722.5	103.1
Monthly average accrued wage per worker (nominal), RUB	42,228	113.1
real		100.8

Note: VFD Territorial Body of Federal State Service data

Figure 1. Movement of price index and non-food goods 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 prices and retail margins in 1 Q 2021 - 1 Q 2022*

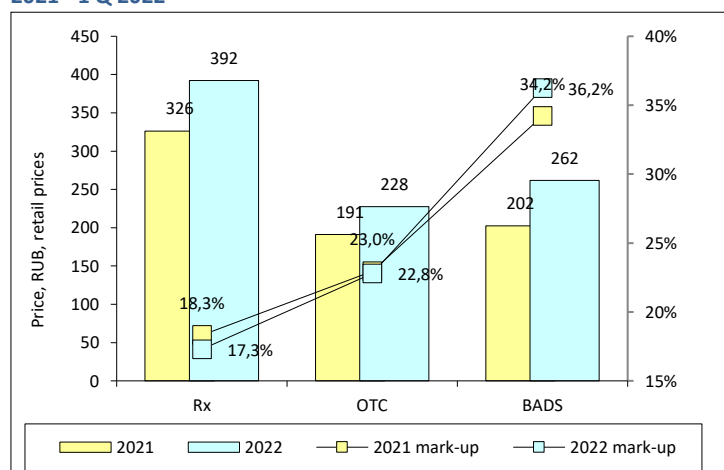
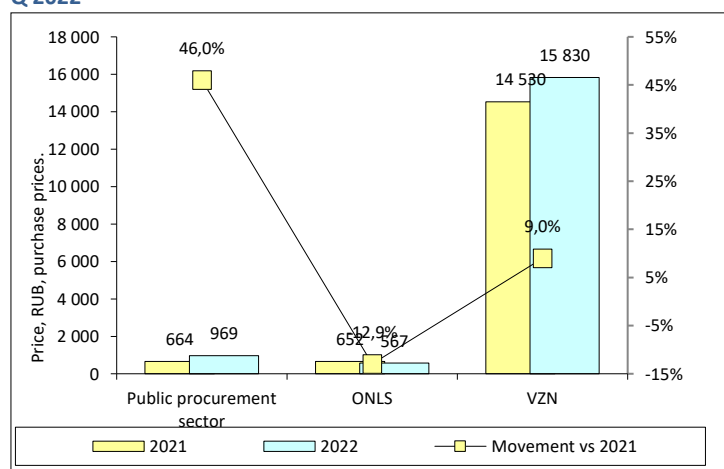


Figure 2. Movement of weighted average purchase prices in 1 Q 2021 - 1 Q 2022



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

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

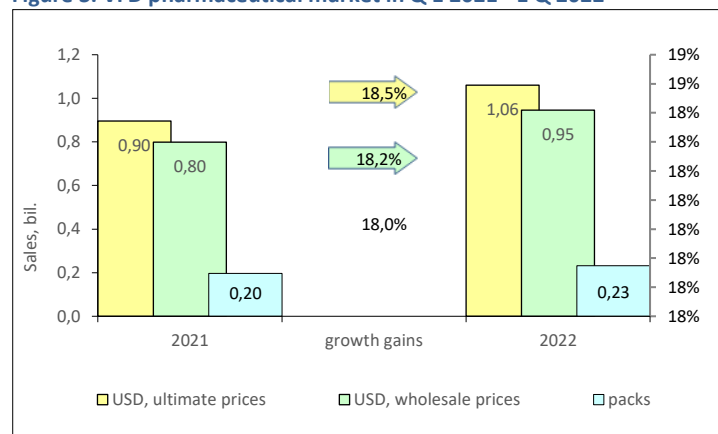


Figure 4. Structure of the VFD pharmaceutical market by major segments in Q 1 2021 - 1 Q 2022

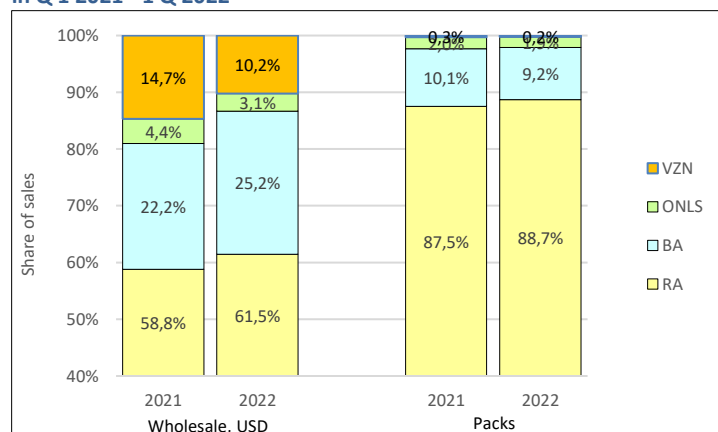


Figure 5. Structure of the retail segment of VFD pharmaceutical market in Q 1 2021 - 1 Q 2022

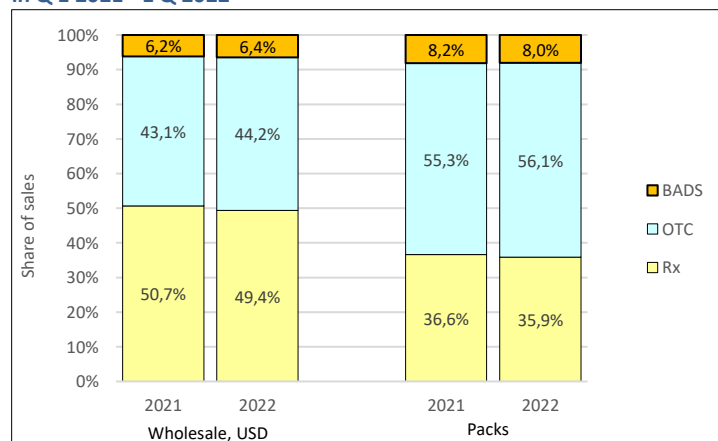
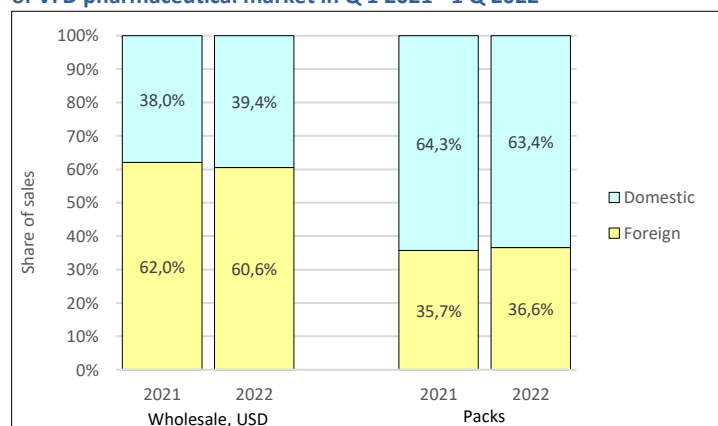


Figure 6. Movement of the Russian/ foreign drugs share in the structure of VFD pharmaceutical market in Q 1 2021 - 1 Q 2022



* Hereinafter IQVIA data

PHARMACEUTICAL MARKET OF THE URAL FEDERAL DISTRICT (UrFD) IN the first quarter of 2022 KEY PERFORMANCE INDICATORS

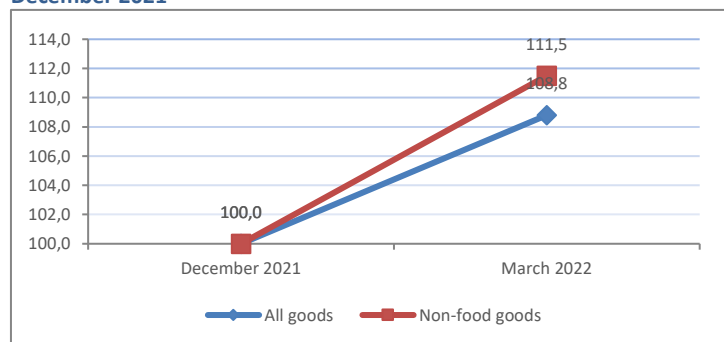
Macroeconomic indices

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

Value	December-March 2022	December-March 2022 (%) vs. December-March 2021
Industrial production index		105.7
Retail turnover, RUB bil.	817.9	103.8
Monthly average accrued wage per worker (nominal), RUB	61,793	112.3
real		102.6

Note: UrFD Territorial Body of Federal State Service data

Figure 1. Movement of price index and non-food goods 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 prices and retail margins in 1 Q 2021 - 1 Q 2022*

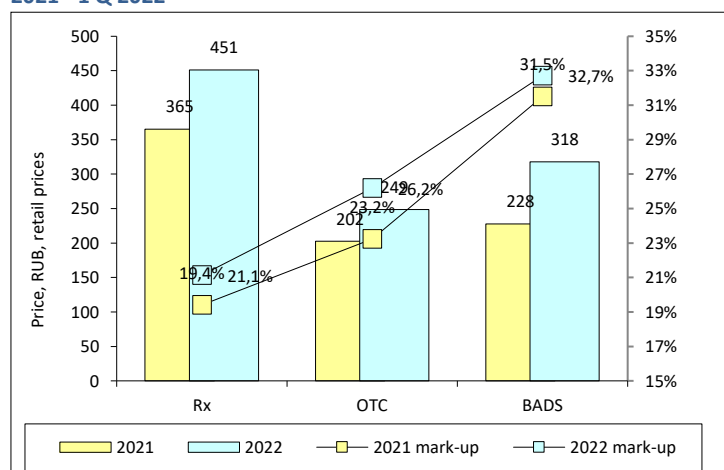
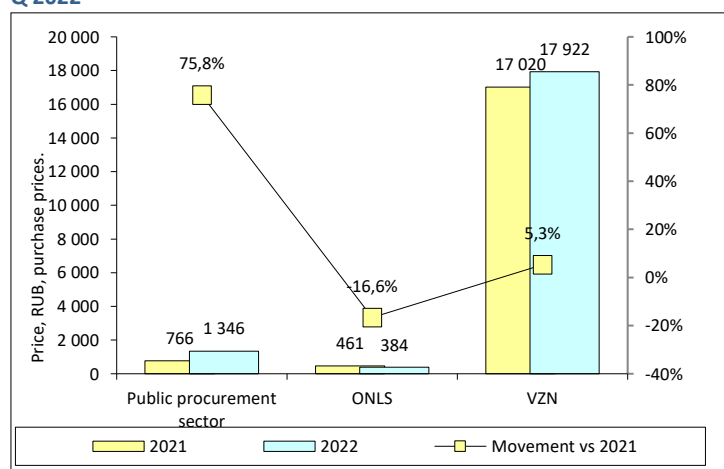


Figure 2. Movement of weighted average purchase prices in 1 Q 2021 - 1 Q 2022



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

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

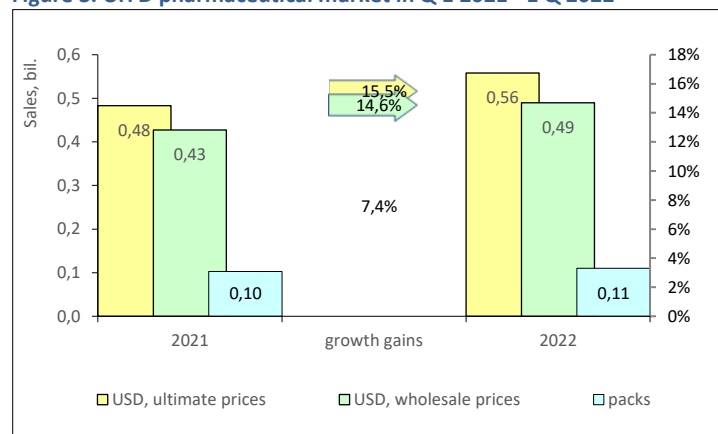


Figure 4. Structure of UFD pharmaceutical market by major segments in Q 1 2021 - 1 Q 2022

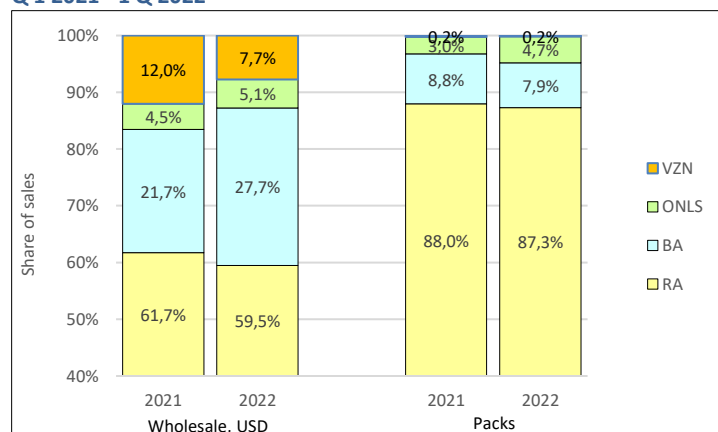


Figure 5. Structure of the retail segment of UrFD pharmaceutical market in Q 1 2021 - 1 Q 2022

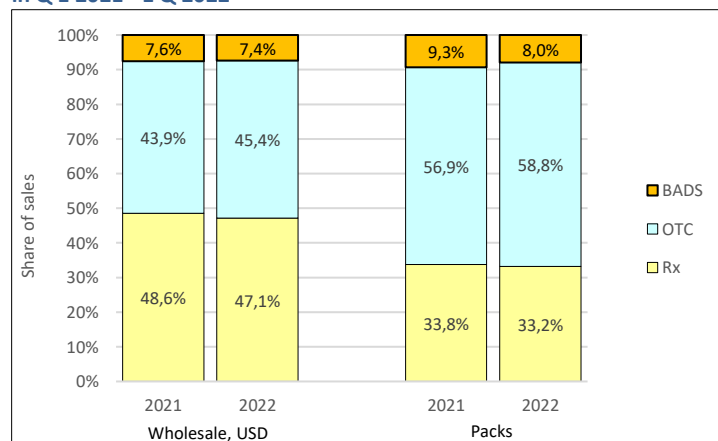
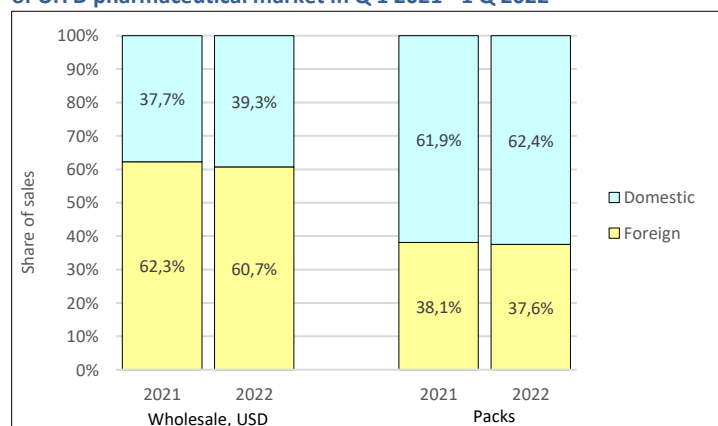


Figure 6. Movement of the Russian/ foreign drugs share in the structure of UrFD pharmaceutical market in Q 1 2021 - 1 Q 2022



* Hereinafter IQVIA data

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

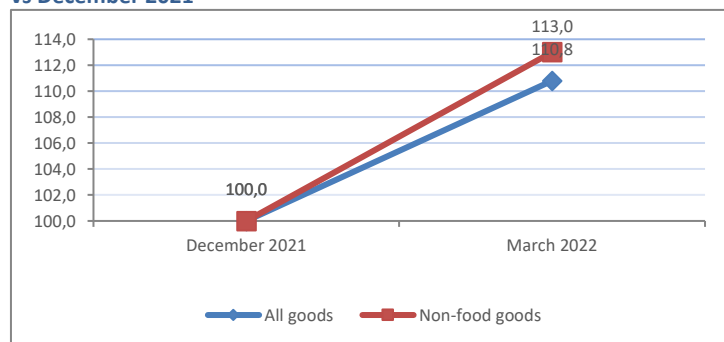
Macroeconomic indices

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

Value	December-March 2022	December-March 2022 (%) vs. December-March 2021
Industrial production index		106.4
Retail turnover, RUB bil.	925.7	107.7
Monthly average accrued wage per worker (nominal), RUB	51,539	115.9
real		102.7

Note: SiFD Territorial Body of Federal State Service data

Figure 1. Movement of the price index and non-food goods 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 prices and retail margins in 1 Q 2021 - 1 Q 2022*

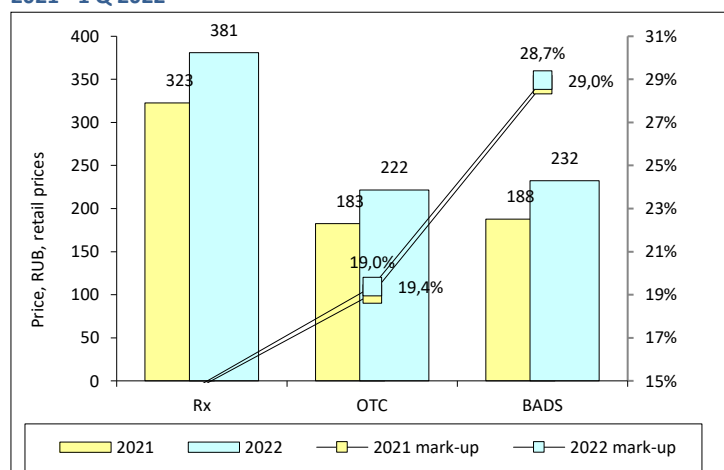
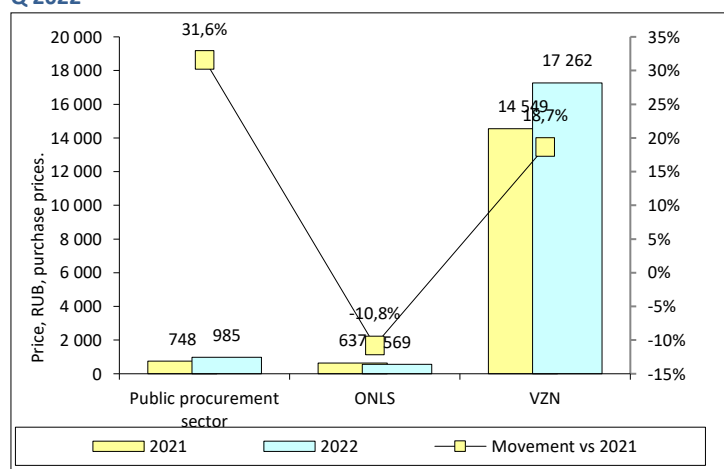


Figure 2. Movement of weighted average purchase prices in 1 Q 2021 - 1 Q 2022



* Hereinafter IQVIA data

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

Figure 3. SiFD pharmaceutical market in Q 1 2021 - 1 Q 2022

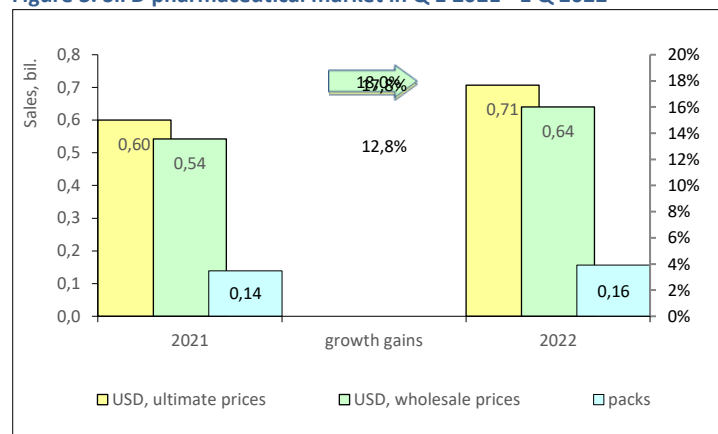


Figure 4. Structure of SiFD pharmaceutical market by major segments in 1 Q 2021 - 1 Q 2022

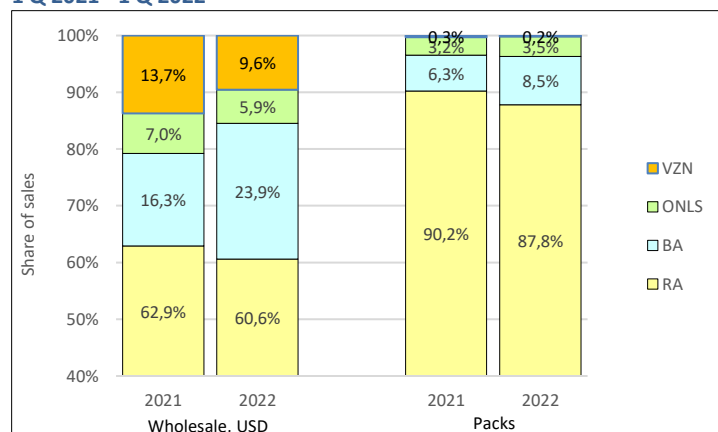


Figure 5. Structure of the retail segment of SiFD pharmaceutical market in 1 Q 2021 - 1 Q 2022

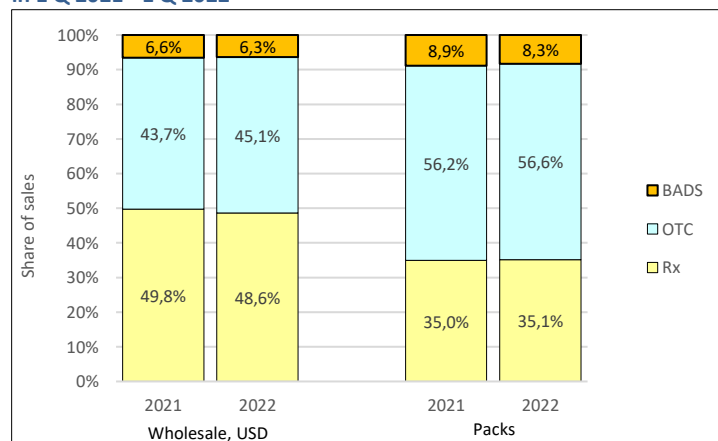
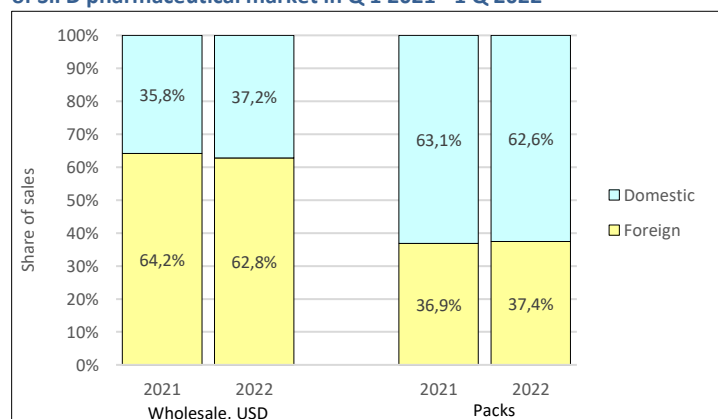


Figure 6. Movement of the Russian/ foreign drugs share in the structure of SiFD pharmaceutical market in Q 1 2021 - 1 Q 2022



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

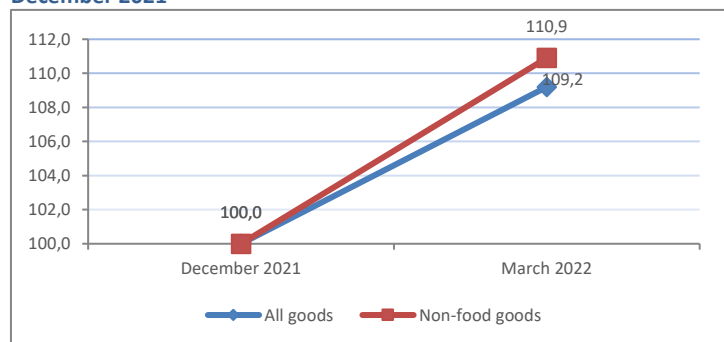
Macroeconomic indices

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

Value	December-March 2022	December-March 2022 (%) vs. December-March 2021
Industrial production index		104.6
Retail turnover, RUB bil.	1,087.0	103.8
Monthly average accrued wage per worker (nominal), RUB	40,860	111.1
real		99.7

Note: SoFD Territorial Body of Federal State Service data

Figure 1. Movement of price index and non-food goods 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 prices and retail margins in 1 Q 2021 - 1 Q 2022*

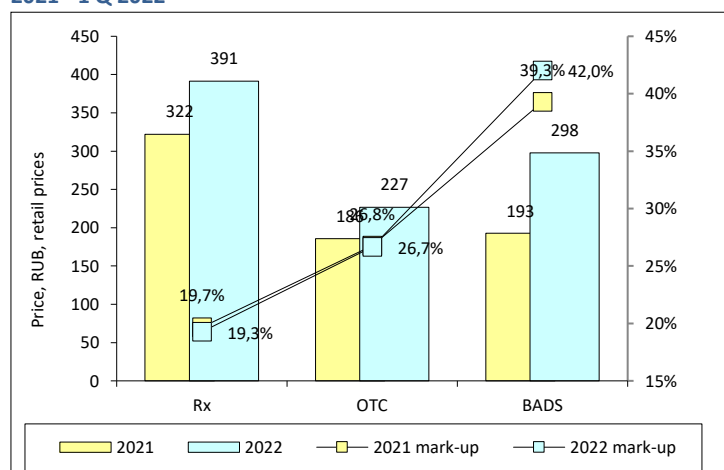
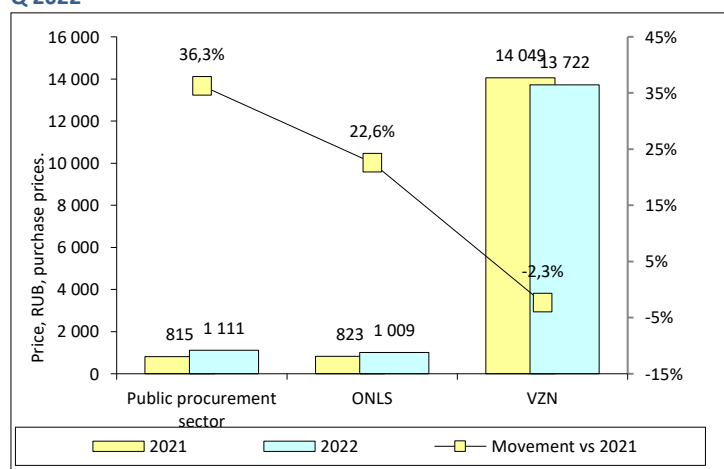


Figure 2. Movement of weighted average purchase prices in 1 Q 2021 - 1 Q 2022



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

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

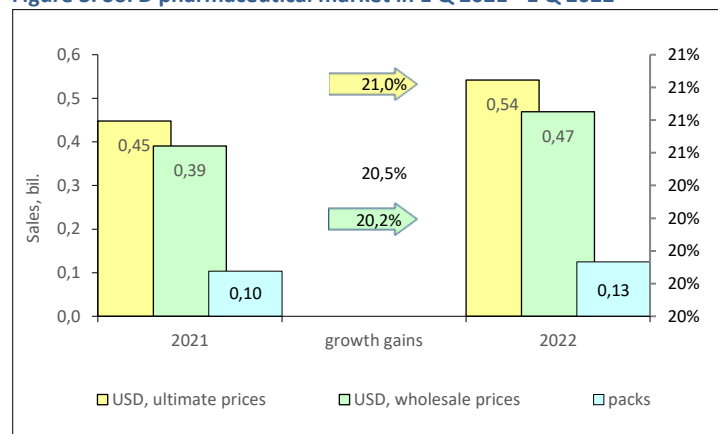


Figure 4. Structure of SoFD pharmaceutical market by major segments in Q 1 2021 - 1 Q 2022

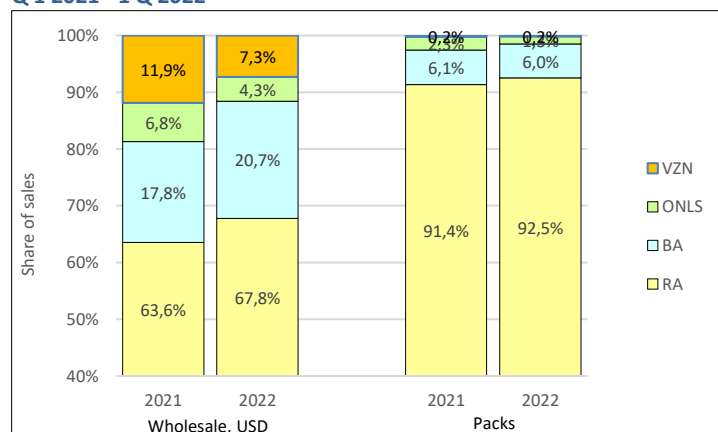


Figure 5. Structure of the retail segment of SoFD pharmaceutical market in Q 1 2021 - 1 Q 2022

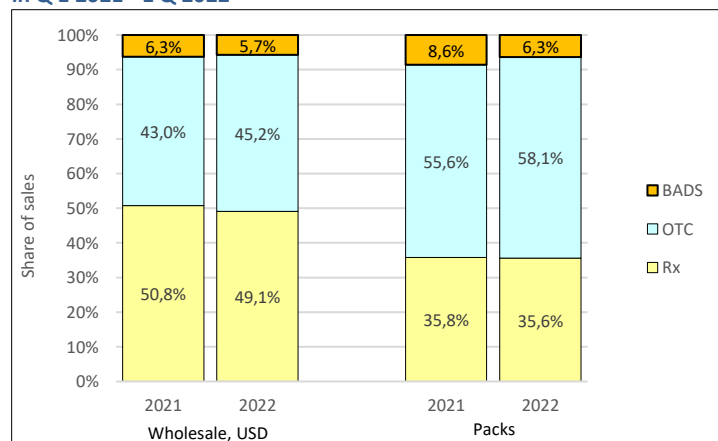
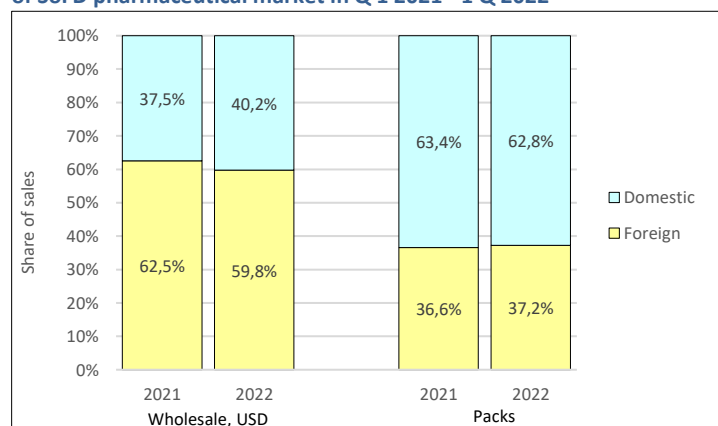


Figure 6. Movement of the Russian/ foreign drugs share in the structure of SoFD pharmaceutical market in Q 1 2021 - 1 Q 2022



* Hereinafter IQVIA data

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

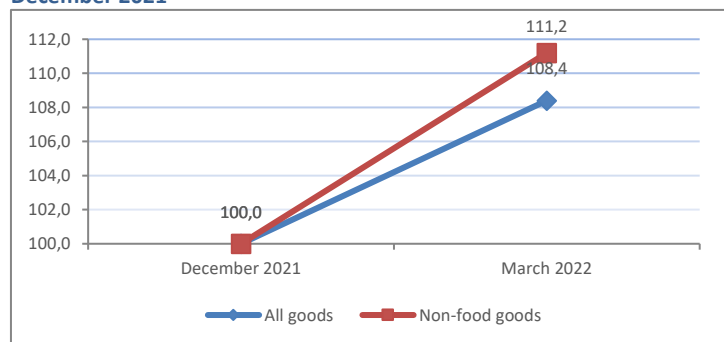
Macroeconomic indices

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

Value	December-March 2022	December-March 2022 (%) vs. December-March 2021
Industrial production index		105.0
Retail turnover, RUB bil.	554.4	101.0
Monthly average accrued wage per worker (nominal), RUB	67,032	110.6
real		100.5

Note: FEFD Territorial Body of Federal State Service data

Figure 1. Movement of price index and non-food goods 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 prices and retail margins in 1 Q 2021 - 1 Q 2022*

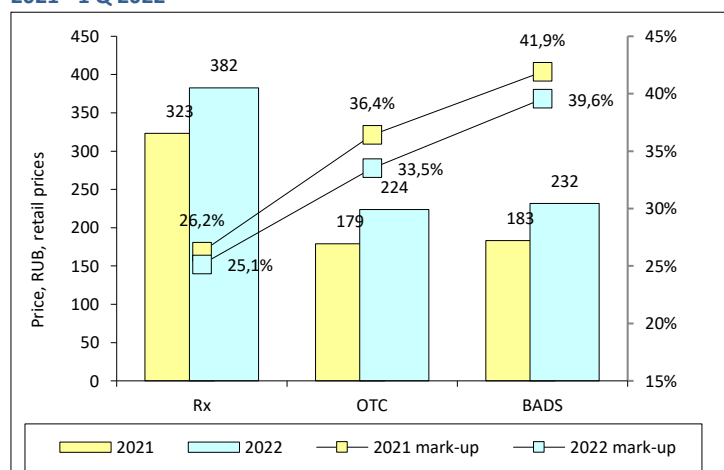
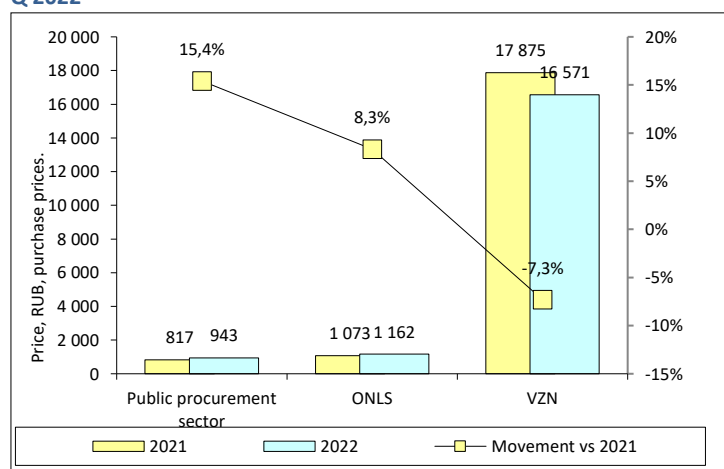


Figure 2. Movement of weighted average purchase prices in 1 Q 2021 - 1 Q 2022



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

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

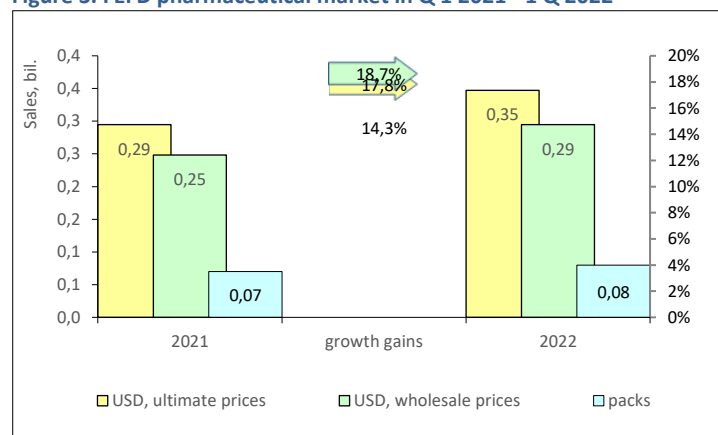


Figure 4. Structure of the FEFD pharmaceutical market by major segments in Q 1 2021 - 1 Q 2022

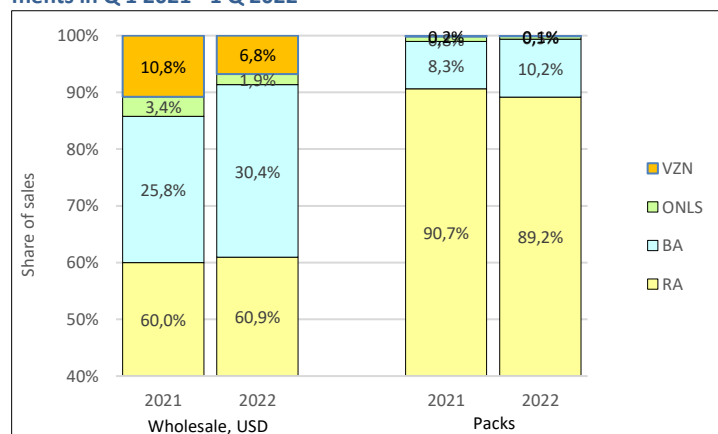


Figure 5. Structure of the retail segment of FEFD pharmaceutical market in Q 1 2021 - 1 Q 2022

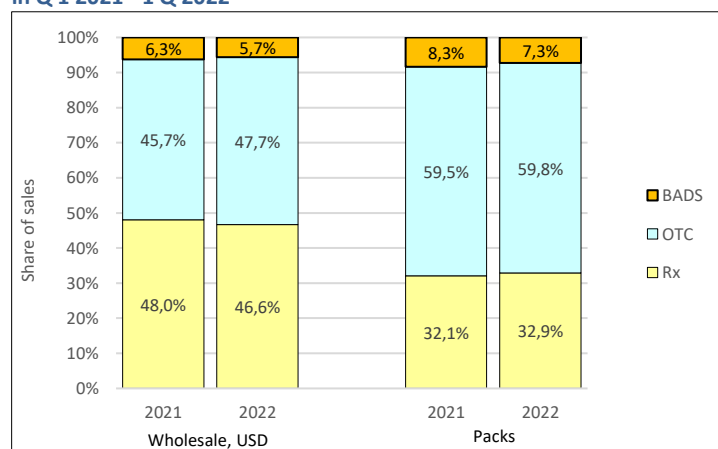
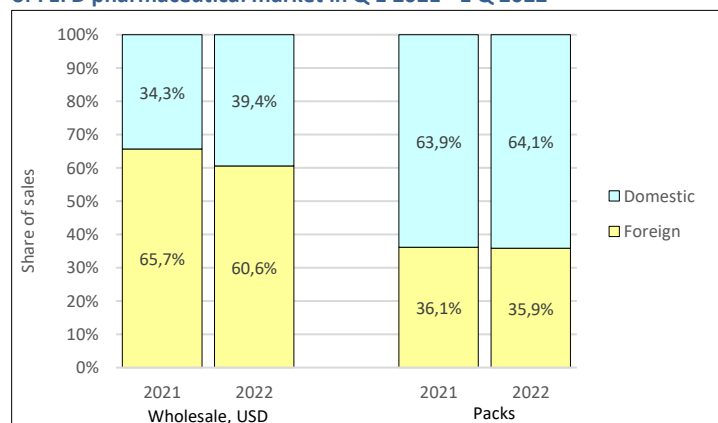


Figure 6. Movement of the Russian/ foreign drugs share in the structure of FEFD pharmaceutical market in Q 1 2021 - 1 Q 2022



* Hereinafter IQVIA data