СОВМЕСТНАЯ ПУБЛИКАЦИЯ
АССОЦИАЦИИ МЕЖДУНАРОДНЫХ
ФАРМАЦЕВТИЧЕСКИХ
ПРОИЗВОДИТЕЛЕЙ
И ГК РЕМЕДИУМ

РЕМЕДИУМ
ГРУППА КОМПАНИЙ

AIPM®

Association of
International
Pharmaceutical
Manufacturers

Ассоциация
международных
фармацевтических
производителей

MACROECONOMIC INDICES

Inflation

According to Federal State Statistics Service's data, in January 2018 the Consumer Price Index was estimated at 100.3%, compared to the previous month.

In January this year, Industrial Producer Price Index (for goods intended for sale on the domestic market) was 100.1%, whereas in the month-earlier period it had amounted to 101.2%.

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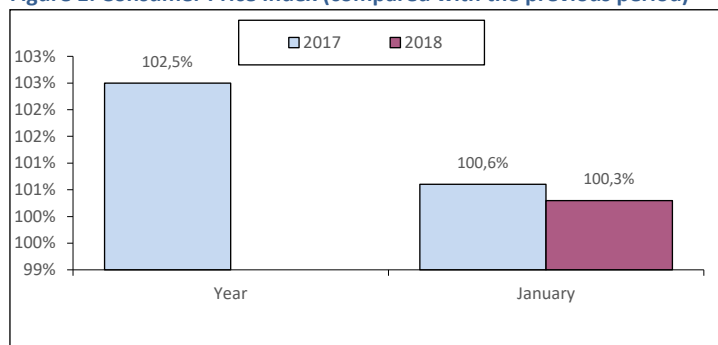

Living standard

According to preliminary Federal State Statistics Service's data, at month-end January 2017 a gross monthly average salary per worker reached RUB 38,400 (USD 676.29) which accounted for 75% as compared to the previous month and 108.5% as compared to January 2017. The real salary in January 2018 accounted for 106.2% as compared with January in 2017. In January 2018, the real value of disposable cash incomes accounted for 100 % as compared with the same period of 2017 (without taking into account a lump sum payment in the amount of 5 thousand roubles to pensioners in January 2017), and 50.3% as compared to December 2017 (Fig. 2).

Retail turnover

In January 2018, the retail turnover was equal to RUR 2321.2 bil, which in stock accounted for 102.8% as compared to January of the previous year (Fig. 2).

Figure 2. Real values of cash incomes, wages and retail turnover in January 2018
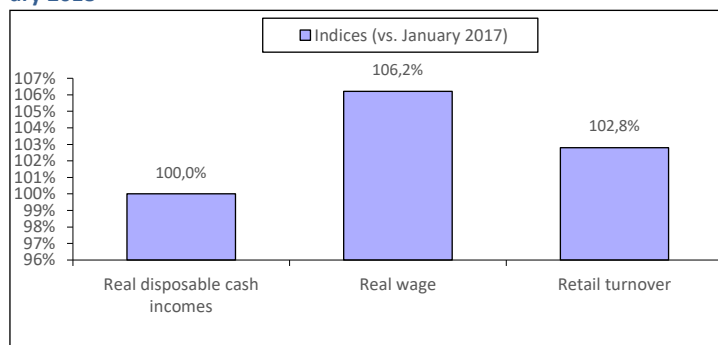
Industrial Production

According to Federal State Statistics Service's data, in January 2018 Industrial Production Index accounted for 102.9% compared to the same period a year ago, 79.6% compared to December 2017.

According to Federal State Statistics Service's data, Industrial Production Index of drugs and medical products in January 2018 accounted for 92.7% compared to the relevant period of the previous year, 72.7% compared to December 2017.

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 January 2018.

Table 1. Top ten Russian chemical and pharmaceutical manufacturers by sales volume January 2018

Rank	Manufacturer	RUB mil.
1	Otcpharm	1848.79
2	Stada	971.66
3	Valenta	956.96
4	Pharmstandart	923.99
5	Servier	619.07
6	Akrikhin Pharma	615.49
7	Sotex	583.48
8	Biocad	572.20
9	Veropharm	537.63
10	Materia Medica	504.24

Source - Remedium according to IMS Health's data

Table 2 provides pharmacy sales data from 10 regions of the Russian Federation. In December 2017 compared to the previous month, sales (in terms of roubles) increased in all regions. Novosibirsk Region showed the highest growth (+35%), Perm showed the lowest one (+6%).

Table 2. Pharmacy sales in the regions, 2017

Region	Pharmacy sales, $ mil. (wholesale prices)			Growth gain, % (roubles)		
	October 2017	November 2017	December 2017	October/September 17	November/October 17	December/November 17
Moscow	192.4	169.8	206.6	5%	-10%	21%
St. Petersburg	56.1	55.8	59.9	0.2%	1%	7%
Krasnodar Krai	36.5	32.9	37.1	-5%	-8%	12%
Krasnoyarsk Krai	28.8	28.6	32.2	4%	2%	12%
Tatarstan	26.4	22.4	26.5	7%	-14%	18%
Rostov Region	24.4	22.6	24.3	6%	-5%	7%
Novosibirsk Region	23.7	23.3	31.7	1%	0,3%	35%
Voronezh Region	14.9	13.2	15.6	-2%	-10%	18%
Perm	9.4	9.3	9.9	-3%	1%	6%
Tyumen	7.6	7.1	8.2	5%	-5%	15%

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 January 2018

Rank	Company*	Quantity of broadcasts
1	Otcpharm	23,772
2	Sandoz	14,952
3	Berlin-Chemie Menarini Group	13,475
4	GSK Consumer Healthcare	12,772
5	Johnson & Johnson	11,176

Source - Remedium according to Mediascope's data

Table 4. Top five brand names in mass media in January 2018

| Rank	Brand*	Quantity of broadcasts
1	Linex	5,150
2	ACC	3,668
3	Polyoxidoni	3,429
4	Complivit	3,302
5	Cycloferon	3,270

Source - Remedium according to Mediascope's data

* Only products registered with State Register of Medicines were considered

RUSSIAN PHARMACY RETAIL DRUG MARKET: 2017 RESULTS

According to the results of the Retail Audit of Finished Pharmaceutical Products (FPP) in Russian Federation™, at year-end 2017 the sales of drugs in physical terms in the country saw a 1% increase to 4.486 bil. packs. In money terms, the market saw a 5% increase in terms of roubles and 20% in terms of dollars. At the same time, the market volume reached RUB 698.638 bil. (USD 11.979 bil.) at wholesale prices (Fig.1). The average cost of a pack increased as compared to a year earlier (USD 2.78) and reached USD 3.33 at retail prices. Consumer spending for drugs in Russia averaged USD 101.74 for 12 months of 2017, whereas during the same period a year ago – USD 86.21.

Figure 1. Russian pharmacy market in 2016 – 2017
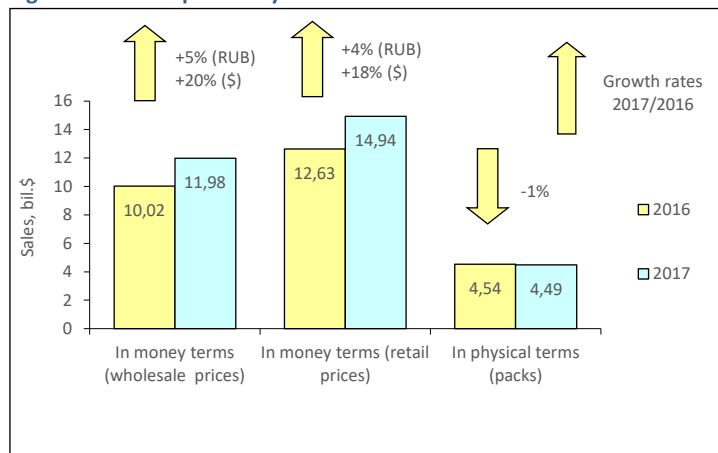
At the end of 2017, the top ten drug manufacturers on the Russian pharmacy market did not change in composition and half of them held their own in the ranking (table 1). However, the top ten ranking leader changed. Due to the highest among leaders sales growth, BAYER (+13%[1]) moved up to rank number one. SANOFI-AVENTIS that had previously topped the ranking reduced its sales by 4% and moved down one rank. As before, the manufacturers TEVA (0%), SERVIER (+5%), OTCPHARM (+4%) and SANDOZ (+3%) held their previous ranks from three through six, respectively. MENARINI (+3%) also held its previous rank eight. ABBOTT (+6%) that showed outperformance rates moved up from rank ten to seven. GLAXOSMITHKLINE (-2%) and STADA (+2%) moved down to the bottom two ranks. In total, based on the results for 12 months 2017, the top ten drug manufacturers accumulated 34.5% of the Russian market, which was 0.5 p.p. less than in 2016.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank		Manufacturer*	Share in total pharmacy sales, %	
2017	2016		2017	2016
1	2	**BAYER HEALTHCARE**	5.1	4.7
2	1	**SANOFI-AVENTIS**	4.7	5.1
3	3	**TEVA**	4.0	4.2
4	4	**SERVIER**	3.5	3.5
5	5	OTCPHARM	3.2	3.2
6	6	**SANDOZ**	3.1	3.2
7	10	ABBOTT	2.8	2.8
8	8	**MENARINI**	2.8	2.8
9	7	**GLAXOSMITHKLINE**	2.7	2.9
10	9	STADA	2.7	2.8
Total			34.5	35.0

*AIPM members are in bold

At the year-end, NUROFEN (+9%), DETRALEX (+25%) and CONCOR (+4%) became the best selling drugs in the national pharmacy market, moving up to the top three ranks of the top ten brands from the lower ranks (Table 2). The last year leaders KAGOCEL (-26%), INGAVIRIN (-25%) and ESSENTIALE (-10%) reduced their sales and fell in the ranks, moving down to ranks seven, ten and four, respectively. Despite outperformance rates, CARDIOMAGNYL (+10%) moved down one rank, coming in at number eight. MEXIDOL (+17%), which held its previous rank nine, and the newcomer brand of the top ten XARELTO (+42%) also showed high sales growth rates. The total share of the top 10 brands reduced from 6.8% to 6.6%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
2017	2016		2017	2016
1	4	NUROFEN	0.7	0.7
2	8	DETRALEX	0.7	0.6
3	5	CONCOR	0.7	0.7
4	3	ESSENTIALE	0.7	0.8
5	14	XARELTO	0.7	0.5
6	6	ACTOVEGIN	0.7	0.7
7	1	KAGOCEL	0.6	0.9
8	7	CARDIOMAGNYL	0.6	0.6
9	9	MEXIDOL	0.6	0.6
10	2	INGAVIRIN	0.6	0.8
Total			6.6	6.8

In contrast to the previous top rankings, XYLOMETAZOLINE (+8%) remained the leader of the top 10 INN and generic names ranking (Table 3). INN IBUPROFEN (+13%) and the composition DIOSMIN*HESPERIDIN (+28%) moved up to ranks two and three from three and six. At the same time, PANCREATIN (+5%) moved down 2 ranks, and INNs BISOPROLOL (+7%) and NIMESULIDE (-1%) lost one rank each. INN PHOSPHOLIPIDS (+1%) also moved down one rank. It was displaced by the top ten newcomer ROSUVASTATIN (+24%) which moved up to rank seven from 11. One more newcomer ETHYLMETHYLHYDROXYPYRIDINE (+17%) moved up to rank ten in the top ten ranking. BLOOD (+7%) that had held its ranks earlier moved up one rank, coming in at number nine. The total share of the top 10 increased from 9.3% to 9.7%.

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

Rank		INNs/Group Names	Share in total pharmacy sales, %	
2017	2016		2017	2016
1	1	XYLOMETAZOLINE	1.7	1.6
2	3	IBUPROFEN	1.1	1.0
3	8	DIOSMIN*HESPERIDIN	1.0	0.8
4	2	PANCREATIN	1.0	1.0
5	4	BISOPROLOL	1.0	0.9
6	5	NIMESULIDE	0.9	0.9
7	11	ROSUVASTATIN	0.9	0.7
8	7	PHOSPHOLIPIDS	0.8	0.9
9	10	BLOOD	0.7	0.7
10	15	ETHYLMETHYLHYDROXYPYRIDINE	0.7	0.6
Total			9.7	9.3

M01 Anti-inflammatory and antirheumatic products (+6%) and C09 Agents acting on the rennin-angiotensin system (+9%) continued to take the lead in the top ten ATC groups ranking in the Russian pharmacy market (Table 4). R01 Nasal preparations (+4%) and G03 Sex hormones (+9%) moved up to ranks three and four from five and seven. Apart from them, only newcomer of the top ten ATC groups B1 Antithrombotic agents (+19%) succeeded in raising in the ranks. At the same time, the groups J01 Antibacterials for systemic use (-3%), J05 Antivirals for systemic use (-20%) and R05 Cough and cold preparations (-5%) that reduced their sales, in contrast, moved down to ranks five, seven and nine, respectively. N02 Analgesics (+1%) and A07 Antidiarrheals, intestinal anti-inflammatory/antiinfective agents (+3%) held their previous ranks six and ten. In total, the top ten ATC groups accumulated 36.4% of the retail market, whereas in 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, %	
2017	2016			2017	2016
1	1	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.9	4.9
2	2	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	4.4	4.3
3	5	R01	NASAL PREPARATIONS	3.8	3.8
4	7	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.7	3.5
5	4	J01	ANTIBACTERIALS FOR SYST USE	3.6	3.9
6	6	N02	ANALGESICS	3.5	3.6
7	3	J05	ANTIVIRALS FOR SYSTEMIC USE	3.2	4.2
8	13	B01	ANTITHROMBOTIC AGENTS	3.2	2.8
9	8	R05	COUGH AND COLD PREPARATIONS	3.0	3.3
10	10	A07	ANTIDIARR.,INTEST. ANTI-INFL./ANTIINFECT. AGENTS	3.0	3.0
Total				36.4	37.4

Conclusion. On the basis of the results for 2017, the pharmacy market of the country brought in RUB 871.108 bil. (USD 14.936 bil.), It was 4% in terms of roubles and 18% in terms of dollars more than in 2016. In physical terms, the market reduced by 1% compared to the previous year and was equal to 4.486 bil. packs. Based on the results for 2017, the average cost of a FPP pack in the Russian pharmacies was USD 3.33, whereas in 2016 it was USD 2.78. The average expenses of the Russian Federation residents for purchase of OTC drugs in pharmacies also increased as compared to the previous year (USD 101.74 vs. USD 86.21).

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

RUSSIAN FEDERATION HOSPITAL MARKET: 2017 RESULTS

According to the results of the Budget Audit of FPPs in the Russian Federation (without DLO and regional benefit)™, based on the results for 2017 the national hospital market increased by 20% in physical terms and amounted to 748.595 mil. packs. In money terms, the market also showed positive growth rates both in terms of roubles (20%) and in terms of dollars (+35%) and reached RUB 186.156 bil. (USD 3.191 mil.) in wholesale prices. Based on the results for 2017, the average cost of an FPP pack in the hospital sector of the Russian Federation was USD 4.26, whereas in the year-earlier period its cost was USD 3.78.

Figure 1. Russian hospital market in 2016 – 2017
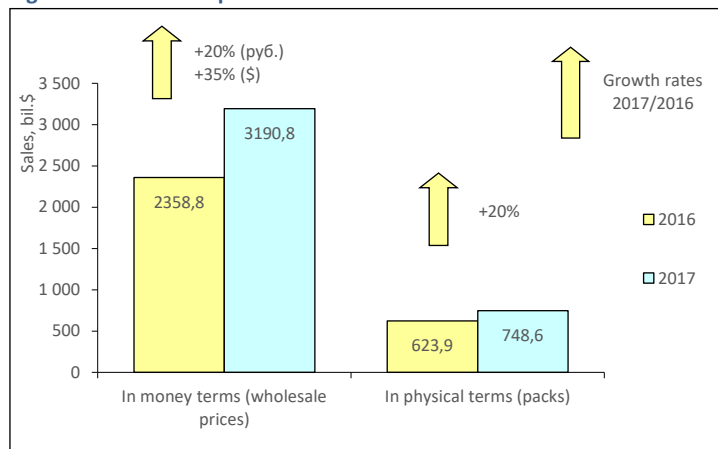
At the year-end 2017, PFIZER (+22%) became the leader of the top ten drug manufacturers on the hospital market of Russia (Table 1). In contrast, the former leader of the top ten ABBVIE (-2%) showed negative growth rates and moved down to rank two. The other manufacturers and the market as a whole showed positive growth rates, and all of them had outperformance sales rates. However, only four of them rose in the ranks. JOHNSON & JOHNSON (+63%) moved up from rank eight to three, displacing PHARMASYNTEZ (+22%) and SANOFI-AVENTIS (+27%) down one rank. Due to 61% growth in purchases, MICROGEN moved up to rank six from nine, displacing the less dynamic MERCK SHARP DOHME (+27%) and BIOCAD (+29%) two ranks down. The manufacturers VEROPHARM (+22%) and BAYER (+42%) placed at two bottom ranks also rose in the ranks. Note that the latter became the only newcomer of the top 10 ranking. The total share accumulated by the top 10 drug manufacturers increased by almost 2 p.p. and amounted to 34.8%.

Table 1. The top 10 drug manufacturers by hospital purchases

Rank in the top ten		Manufacturer*	Share in total hospital purchases, %	
2017	2016		2017	2016
1	2	**PFIZER**	5.0	4.9
2	1	ABBVIE	4.4	5.4
3	8	**JOHNSON & JOHNSON**	3.8	2.8
4	3	PHARMASYNTEZ	3.7	3.6
5	4	**SANOFI-AVENTIS**	3.5	3.4
6	9	MICROGEN	3.5	2.6
7	5	**MERCK SHARP DOHME**	3.3	3.1
8	6	BIOCAD RF	3.3	3.0
9	10	VEROPHARM	2.2	2.2
10	12	**BAYER HEALTHCARE**	2.1	1.8
Total			34.8	32.9

*AIPM members are in bold

PREVENAR 13 (+23%) became the most in-demand brand in the hospital market of Russia, moving up to rank number one from three (Table 2). The traditional hospital product NATRIUM CHLORIDUM (+13%) continued holding rank two, whereas the former leading brand KALETRA (-8%) moved down to rank three. SOVIGRIPP that increased its purchases 2.5 times moved up to rank four from seven, displacing ISENTRESS (+52%) down one rank. INTELENCE (+92%) and two newcomers of the top ten PENTAXIM (10-fold growth in purchases) and SEVORAN (+14%) also moved up to the higher ranks, coming in at ranks six, eight and ten, respectively. At the same time, REYATAZ (-11%) and CUROSURF (+4%) that showed negative and relatively low growth rates lost one rank each and moved down to ranks seven and nine. The total share of the top 10 trade names increased from 14.6% to 15.7%.

Table 2. The top 10 brands by hospital purchases

Rank in the top ten		Brand	Share in total hospital purchases, %	
2017	2016		2017	2016
1	3	PREVENAR 13	2.9	2.8
2	2	NATRIUM CHLORIDUM	2.8	3.0
3	1	KALETRA	2.4	3.2
4	7	SOVIGRIPP	2.0	1.0
5	4	ISENTRESS	1.4	1.1
6	10	INTELENCE	1.2	0.8
7	6	REYATAZ	0.8	1.1
8	48	PENTAXIM	0.8	0.1
9	8	CUROSURF	0.7	0.8

Rank in the top ten		Brand	Share in total hospital purchases, %	
2017	2016		2017	2016
10	14	SEVORAN	0.7	0.7
Total			15.7	14.6

Two newcomers broke into the top 10 INN and group names ranking as well (table 3). INNs ETRAVIRINE (+92%) and IMMUNOGLOBULIN BASE (+21%) moved up to ranks eight and ten, respectively. RALTEGRAVIR (+52%), ATAZANAVIR (+43%) and DARUNAVIR (+34%) also showed high growth rates and ratings-boosting, moving up to ranks five through seven, respectively. The composition LOPINAVIR*RITONAVIR that had previously topped the ranking reduced its purchases by 8% and moved down to rank four. At the same time, VACCINE, PNEUMOCOCCAL (+25%), SODIUM (+13%) and VACCINE, INFLUENZA (+66%) moved up one rank, coming in at numbers one through three, respectively. INN ENOXAPARIN SODIUM (+9%) moved down two ranks, to number nine. The total share of the top 10 increased by almost 1 p.p. and accounted for 18.3%.

Table 3. The top 10 INNs and Group Names by hospital purchases

Rank		INNs/Group Names	Share in total hospital purchases, %	
2017	2016		2017	2016
1	2	VACCINE, PNEUMOCOCCAL	3.2	3.1
2	3	SODIUM	2.8	3.0
3	4	VACCINE, INFLUENZA	2.6	1.9
4	1	LOPINAVIR*RITONAVIR	2.4	3.2
5	8	RALTEGRAVIR	1.4	1.1
6	10	ATAZANAVIR	1.3	1.1
7	9	DARUNAVIR	1.2	1.1
8	19	ETRAVIRINE	1.2	0.8
9	7	ENOXAPARIN SODIUM	1.1	1.2
10	12	IMMUNOGLOBULIN BASE	1.0	1.0
Total			18.3	17.4

The leader of the top-10 ATC groups ranking changed (table 4). J05 Antivirals for systemic use (+23%) moved up to rank number one from two, displacing L01 Antineoplastic agents (+10%) down to rank two. The same shift took place just below. The less dynamic J07 Vaccines (+29%) moved up from rank four to three; whereas the less dynamic J01 Antibacterials for systemic use (+12%) that had been placed at that rank earlier moved down to rank four. J04 Antimycobacterials (+42%) broke into the ranks of the top ten, moving up to rank eight. At the same time, N01Anaesthetics (+27%) and N05 Psycholeptics (+22%) moved down to two bottom ranks. The groups B05 Blood substitutes and perfusion solutions (+22%), B01 Antithrombotic agents (+16%) and V08 Contrast media (+23%) held their previous ranks from five through seven, respectively. In total, the top ten ATC groups accumulated 64.7% of the hospital market, whereas in the year-earlier period 65%.

Table 4. The top ten ATC groups by hospital purchases

Rank		ATC code	ATC group	Share in total hospital purchases, %	
2017	2016			2017	2016
1	2	J05	ANTIVIRALS FOR SYSTEMIC USE	13.3	13.0
2	1	L01	ANTINEOPLASTIC AGENTS	12.4	13.5
3	4	J07	VACCINES	9.5	8.8
4	3	J01	ANTIBACTERIALS FOR SYST USE	8.6	9.3
5	5		B05 - PLASMA SUBSTITUTES AND PERFUSION SOLUTIONS	6.4	6.3
6	6		B01 - ANTITHROMBOTIC AGENTS	4.7	4.9
7	7		V08 - CONTRAST MEDIA	2.7	2.6
8	11	J04	- ANTIMYCOBACTERIALS	2.4	2.0
9	8	N01	- ANESTHETICS	2.4	2.3
10	9	N05	- PSYCHOLEPTICS	2.3	2.3
Total				64.7	65.0

Conclusion. At the end of 2017, the Russian hospital market showed strong growth both in rouble terms (+20%) and in dollar terms (+35%) and brought in RUB 186.156 bil. (USD 3.191 bil.). In physical terms, the market expanded by 20% and amounted to 748.595 mil. packs. At the end of 2017, the average cost of a finished pharma product (FPP) pack in the Russian hospital sector amounted to USD 4.26 vs. USD 3.78 in the year earlier period.

PHARMACEUTICAL MARKET OF THE CENTRAL FEDERAL DISTRICT (CFD) IN 1-4 QUARTER OF 2017 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	December-January 2017	December-January 2017 (%) vs. December-January 2016
Industrial production index		100.9
Retail turnover, RUB bil.	10,154.5	102.4
Monthly average accrued wage per one worker (nominal), RUB	48,396	108.2
real		103.9

Note: CFD TOGS data

**Table 2. Inflation rates in the CFD, December 2017**

	December 2017 vs. December 2016
CPI	103.2
CPI for non-food products	103.2

Indicators of price dynamics and retail margins

**Table 3. Results of the VED price monitoring conducted by Roszdravnad-zor in CFD**

	Price dynamics in December 2017 vs. December 2016 (%)		
	Retail prices	Wholesale prices	Manufactur-ers' prices
VED total	-1.6	-1.3	1.2
Not more than RUB 50	-2.2		
From RUB 50 to 500	-1.6		
Over RUB 500	-0.8		

Figure 1. Dynamics of weighted average prices and retail margins in 1-4 Q 2016 – 1-4 Q 2017
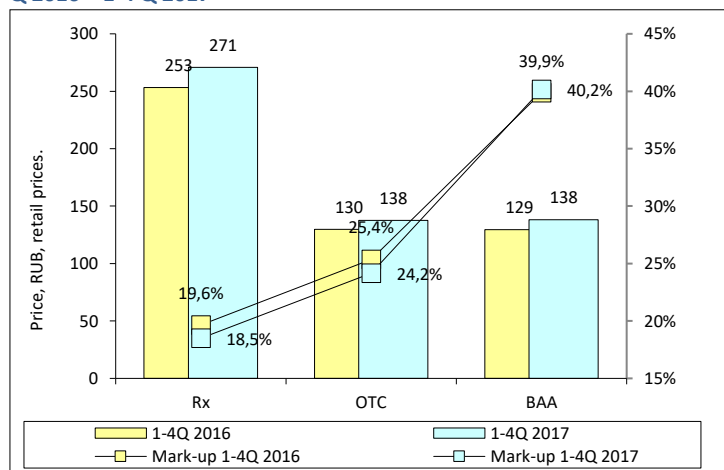

## *Indicators of the dynamics and structure of the market[2]*

**Figure 2. CFD pharmaceutical market in Q 1-4, 2016 – 1-4 Q 2017**
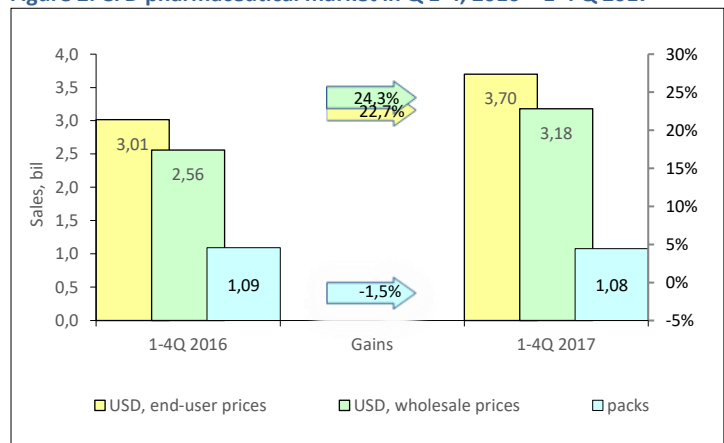
Figure 3. Structure of CFD pharmaceutical market by major segments in Q 1-4, 2016 – 1-4 Q 2017
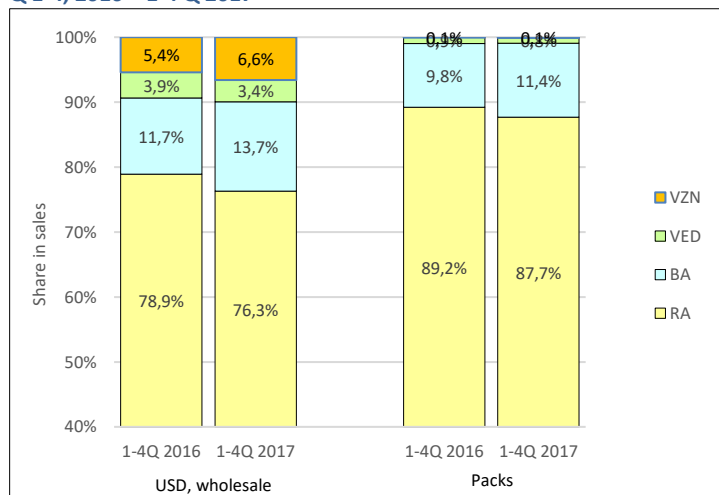
Figure 4. Structure of the retail segment of CFD market in Q 1-4, 2016 – 1-4 Q 2017
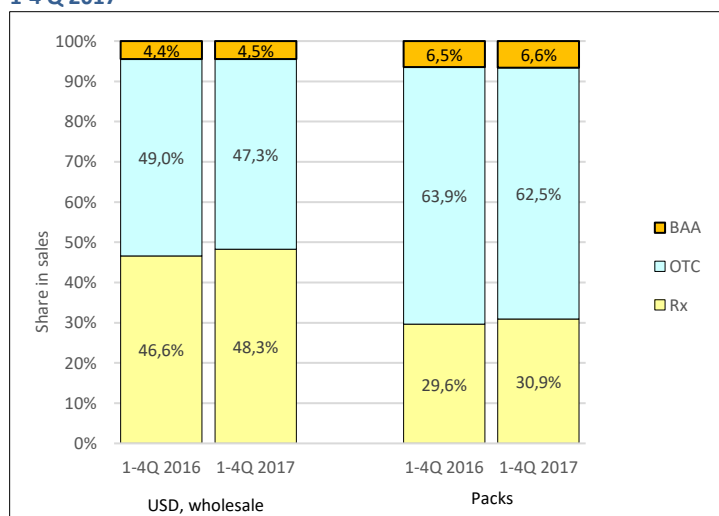
Figure 5. Dynamics of the Russian/ foreign drugs share in the structure of CFD pharmaceutical market in Q 1-4, 2016 – 1-4 Q 2017

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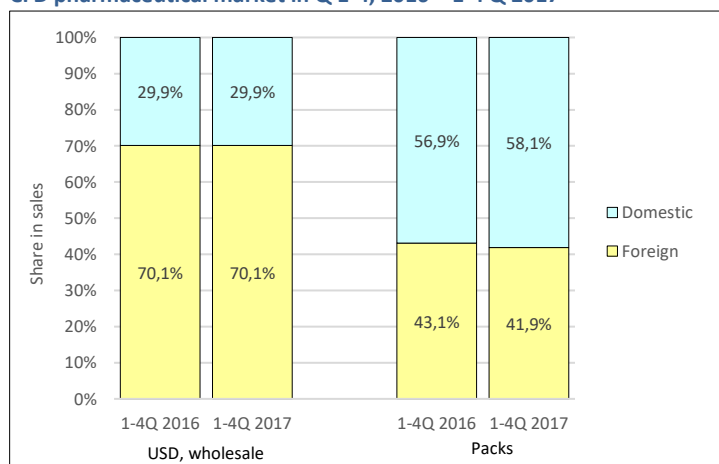
[2] Exclusive of Moscow

PHARMACEUTICAL MARKET OF THE NORTH-WESTERN FEDERAL DISTRICT (NWFD) IN 1-4 Q, 2017 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	December-January 2017	December-January 2017 (%) vs. December-January 2016
Industrial production index		101.8
Retail turnover, RUB bil.	2,895.8	101.8
Monthly average accrued wage per one worker (nominal), RUB	44,696	107.8
real		103.7

Note: NWFD TOGS data

Table 2. Inflation rates in the NWFD, December 2017

	December 2017 vs. December 2016
CPI	103.1
CPI for non-food products	102.9

Indicators of price dynamics and retail margins

**Table 3. Results of the VED price monitoring conducted by Roszdravnadzor in NWFD**

	Price dynamics in December 2017 vs. December 2016 (%)		
	Retail prices	Wholesale prices	Manufacturers' prices
VED total	-1.1	-0.6	0.1
Not more than RUB 50	-1.6		
From RUB 50 to 500	-1.3		
Over RUB 500	-0.8		

Figure 1. Dynamics of weighted average prices and retail margins in 1-4 Q 2016 – 1-4 Q 2017
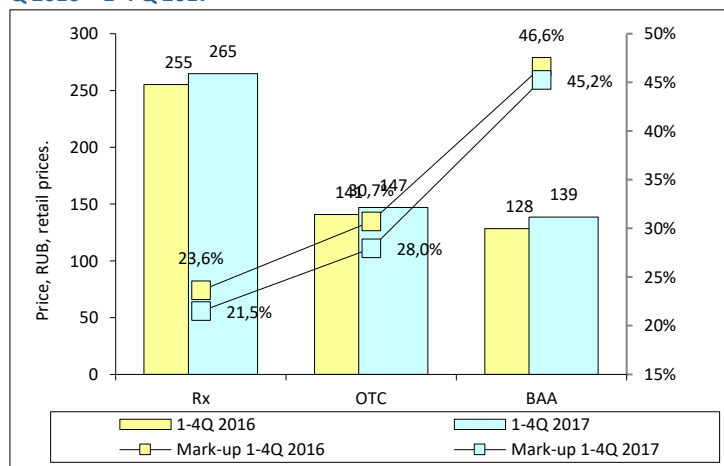
Indicators of the dynamics and structure of the market[3]

Figure 2. NWFD pharmaceutical market in Q 1-4, 2016 – 1-4 Q 2017
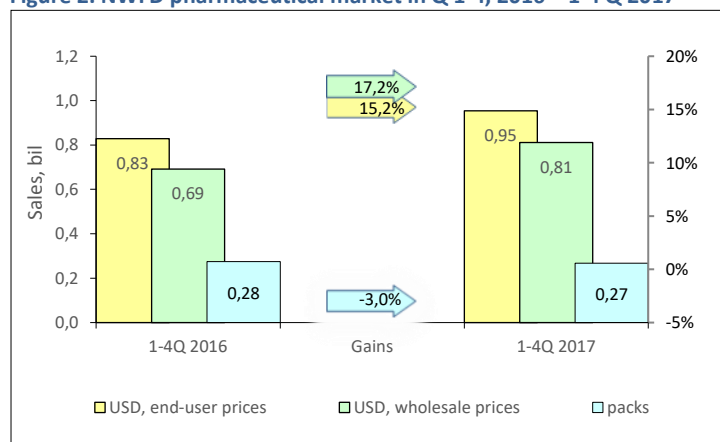
Figure 3. Structure of NWFD pharmaceutical market by major segments in Q 1-4, 2016 – 1-4 Q 2017
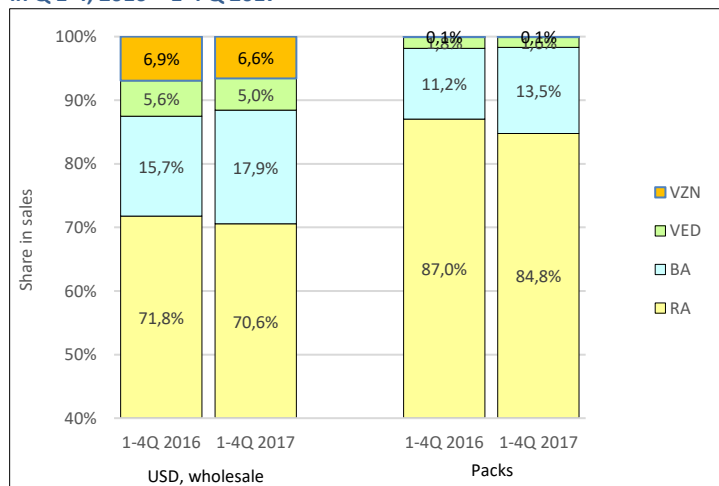
Figure 4. Structure of the retail segment of NWFD market in Q 1-4, 2016 – 1-4 Q 2017
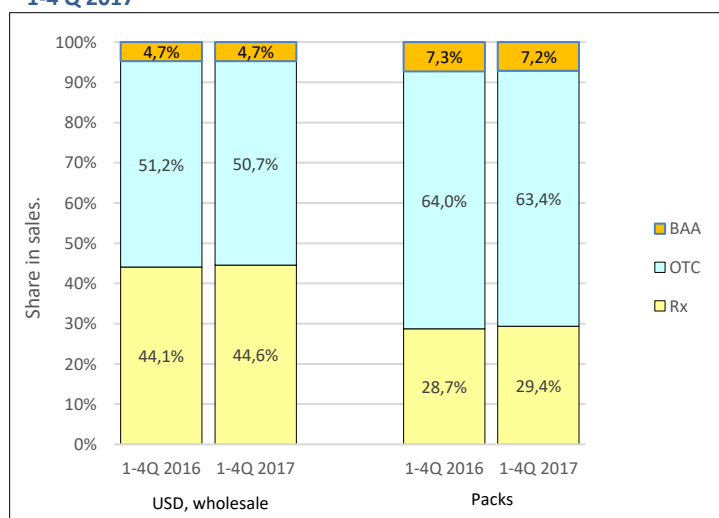
Figure 5. Dynamics of the Russian/ foreign drugs share in the structure of NWFD pharmaceutical market in Q 1-4, 2016 – 1-4 Q 2017

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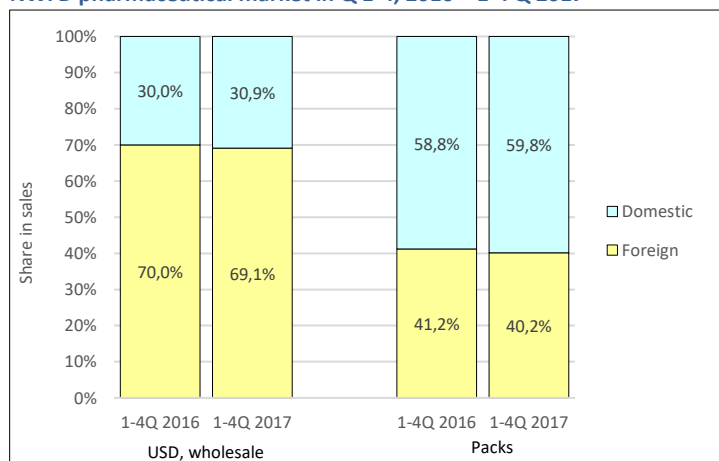
[3] Exclusive of St. Petersburg

PHARMACEUTICAL MARKET OF THE VOLGA FEDERAL DISTRICT (VFD) IN Q 1-4 OF 2017 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	December-January 2017	December-January 2017 (%) vs. December-January 2016
Industrial production index		101.0
Retail turnover, RUB bil.	5,222.8	101.8
Monthly average accrued wage per one worker (nominal), RUB	29,166	106.4
real		103.2

Note: VFD TOGS data

Table 2. Inflation rates in the VFD, December 2017

	December 2017 as against December 2016
CPI	101.9
CPI for non-food products	102.1

Indicators of price dynamics and retail margins

Table 3. Results of the VED price monitoring conducted by Roszdravnadzor in VFD

	Price dynamics in December 2017 vs. December 2016 (%)		
	Retail prices	Wholesale prices	Manufacturers' prices
VED total	-2.0	-1.7	0.1
Not more than RUB 50	-2.0		
RUB 50 to 500	-2.3		
Over RUB 500	-1.5		

Figure 1. Dynamics of weighted average prices and retail margins in 1-4 Q 2016 – 1-4 Q 2017
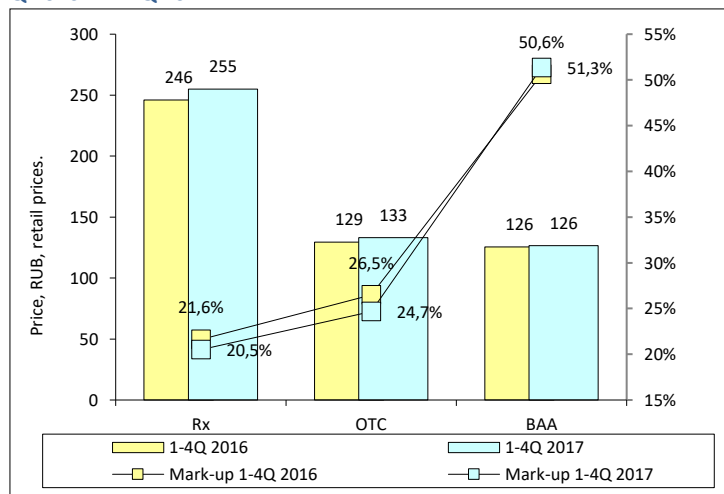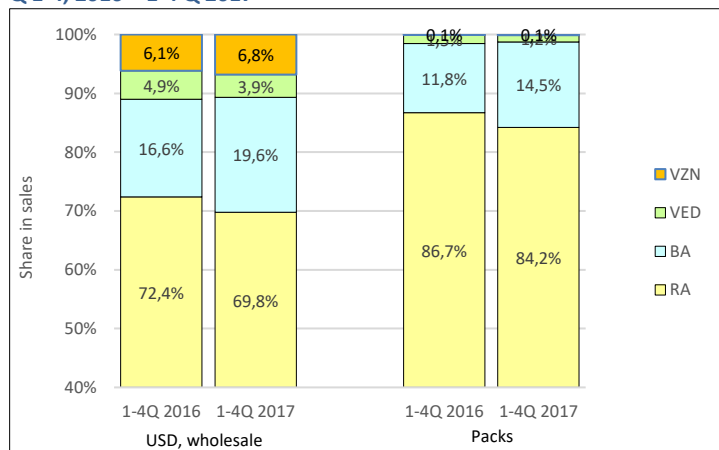

Indicators of the dynamics and structure of the market
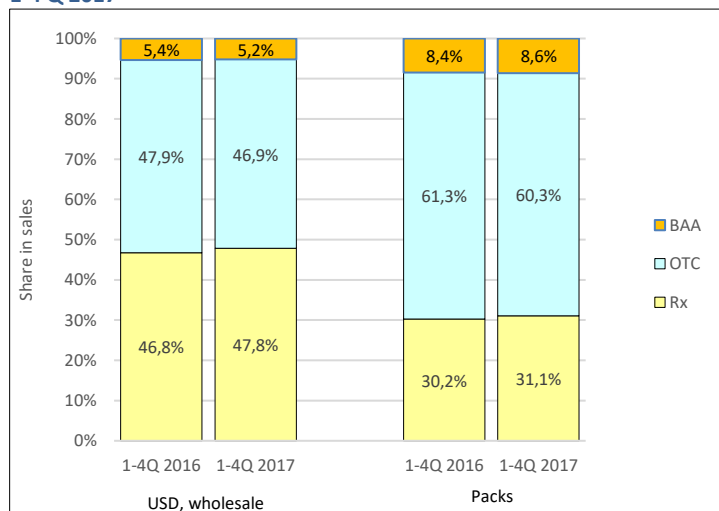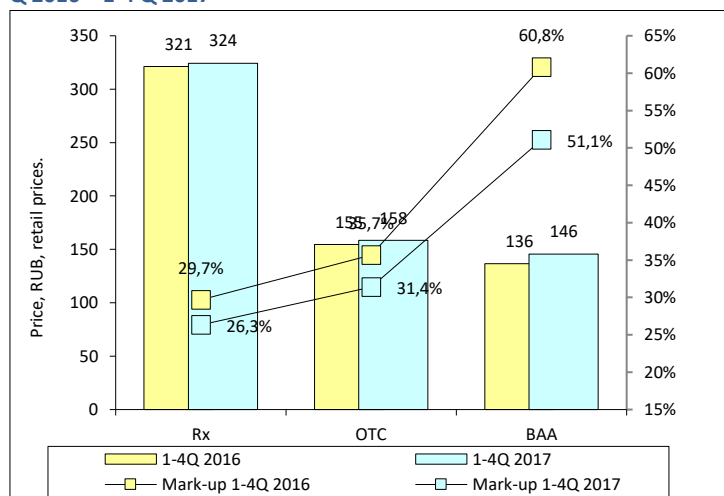
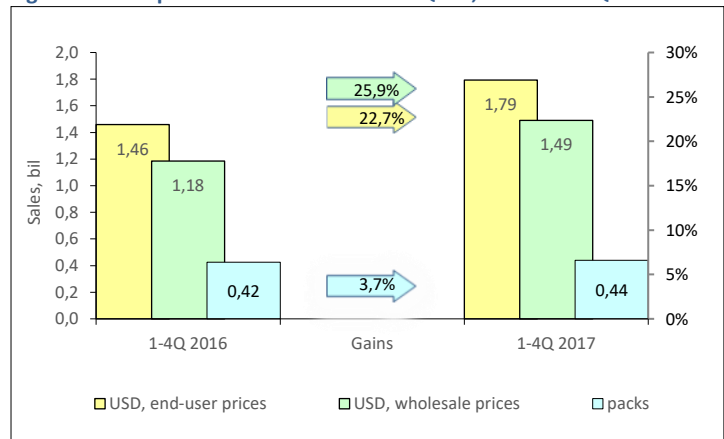### Figure 2. VFD pharmaceutical market in Q 1-4, 2016 – 1-4 Q 2017
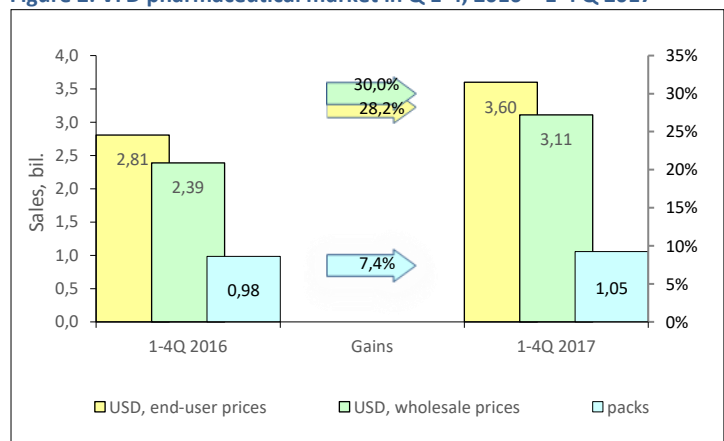
Figure 3. Structure of PFD pharmaceutical market by major segments in Q 1-4, 2016 – 1-4 Q 2017
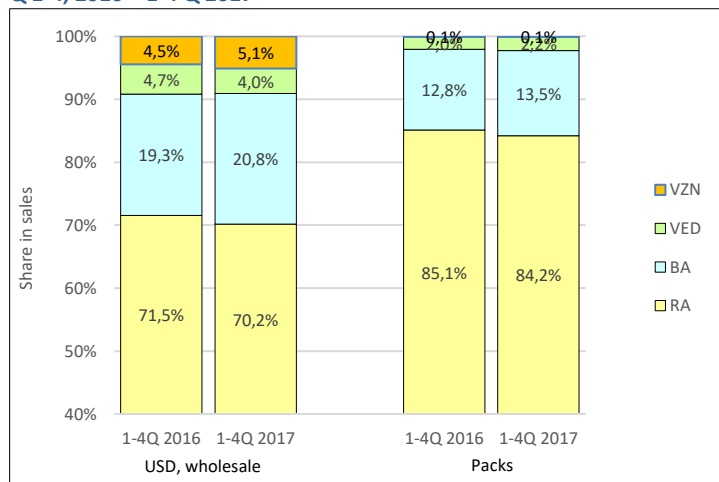

Figure 4. Structure of the retail segment of VFD market in Q 1-4, 2016 – 1-4 Q 2017

Figure 5. Dynamics of the Russian/foreign drugs share in the structure of VFD pharmaceutical market in Q 1-4, 2016 – 1-4 Q 2017

PHARMACEUTICAL MARKET OF THE URAL FEDERAL DISTRICT (URFD) IN Q 1-4, 2017 KEY PERFORMANCE INDICATORS
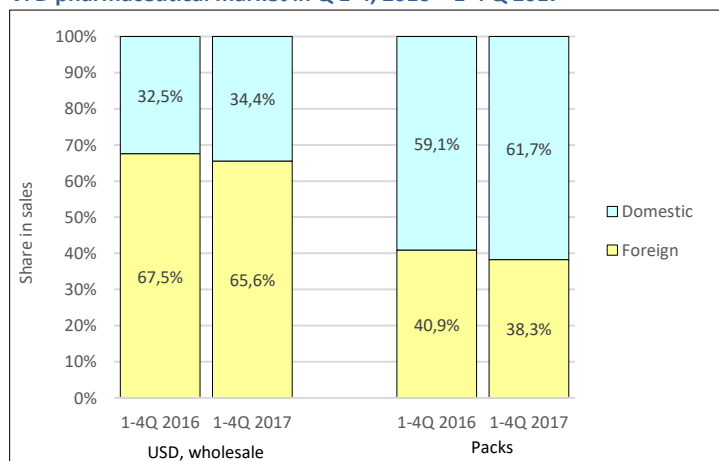
Macroeconomic indices

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

Value	December-January 2017	December-January 2017 (%) vs. December-January 2016
Industrial production index		102.0
Retail turnover, RUB bil.	2,554.6	99.5
Monthly average accrued wage per one worker (nominal), RUB	43,853	106.6
real		102.9

Note: VFD TOGS data

Table 2. Inflation rates in the UrFD, December 2017

	December 2017 as against December 2016
CPI	102.4
CPI for non-food products	103.4

Indicators of price dynamics and retail margins

Table 3. Results of the VED price monitoring conducted by Roszdravnadzor in UrFD

	Price dynamics in December 2017 as against December 2016 (%)		
	Retail prices	Wholesale prices	Manufacturers' prices
VED total	-2.7	-1.5	-0.1
Not more than RUB 50	-3.0		
RUB 50 to 500	-2.8		
Over RUB 500	-2.6		

Figure 1. Dynamics of weighted average prices and retail margins in 1-4 Q 2016 – 1-4 Q 2017

Indicators of the dynamics and structure of the market

Figure 2. UrFD pharmaceutical market in Q 1-4, 2016 – 1-4 Q 2017

Figure 3. Structure of UrFD pharmaceutical market by major segments in Q 1-4, 2016 – 1-4 Q 2017

Figure 4. Structure of the retail segment of UrFD market in Q 1-4, 2016 – 1-4 Q 2017
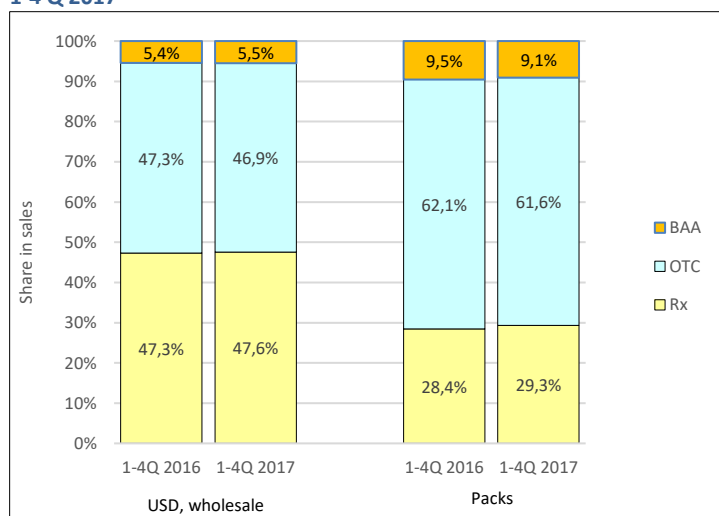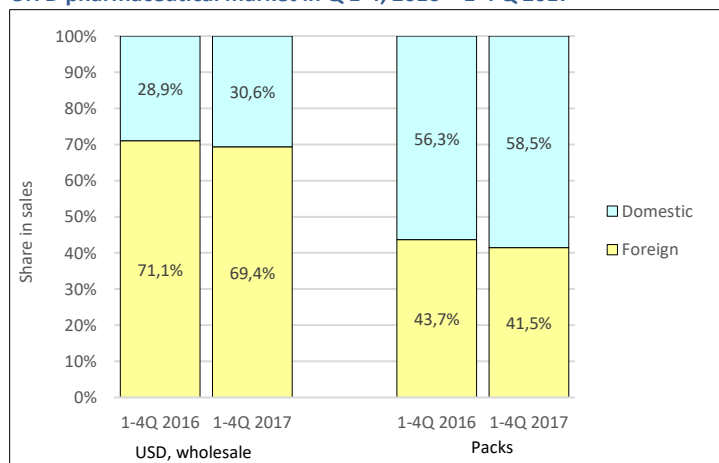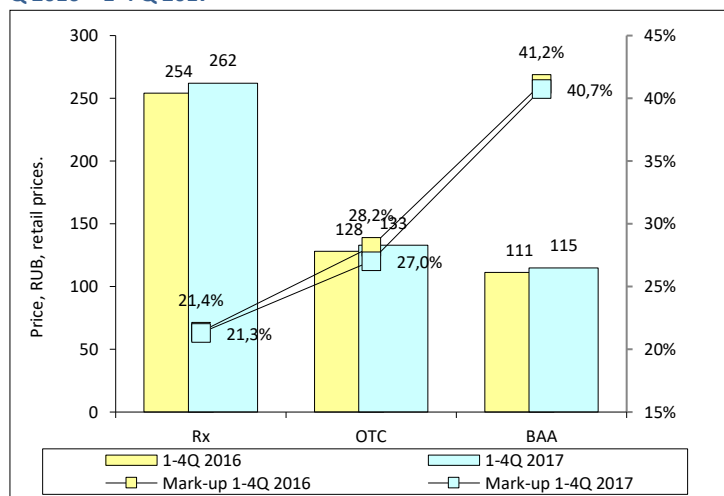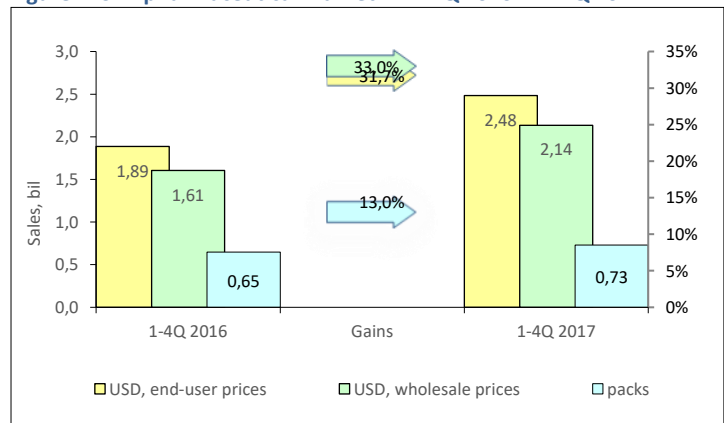

Figure 5. Dynamics of the Russian/ foreign drugs share in the structure of UrFD pharmaceutical market in Q 1-4, 2016 – 1-4 Q 2017

PHARMACEUTICAL MARKET OF THE SIBERIA FEDERAL DISTRICT (SFD) IN 1-4 Q OF 2017 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	December-January 2017	December-January 2017 (%) vs. December-January 2016
Industrial production index		101.8
Retail turnover, RUB bil.	2,906.9	101.0
Monthly average accrued wage per one worker (nominal), RUB	33,822	106.7
real		103.5

Note: SiFD TOGS data

Table 2. Inflation rates in the SiFD, December 2017

	December 2017 vs. December 2016
CPI	102.0
CPI for non-food products	102.4

Indicators of price dynamics and retail margins

Table 3. Results of the VED price monitoring conducted by Roszdravnadzor in SiFD

	Price dynamics in December 2017 vs. December 2016 (%)		
	Retail prices	Wholesale prices	Manufacturers' prices
VED total	-2.3	-2.7	-0.8
Not more than RUB 50	-2.8		
From RUB 50 to 500	-2.5		
Over RUB 500	-0.8		

Figure 1. Dynamics of weighted average prices and retail margins in 1-4 Q 2016 – 1-4 Q 2017
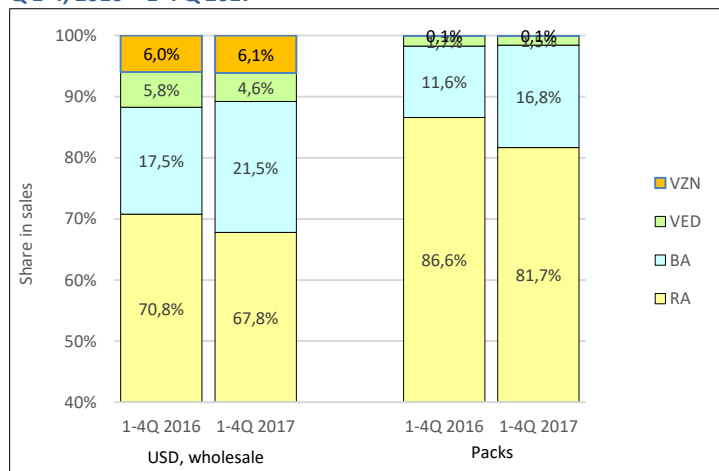

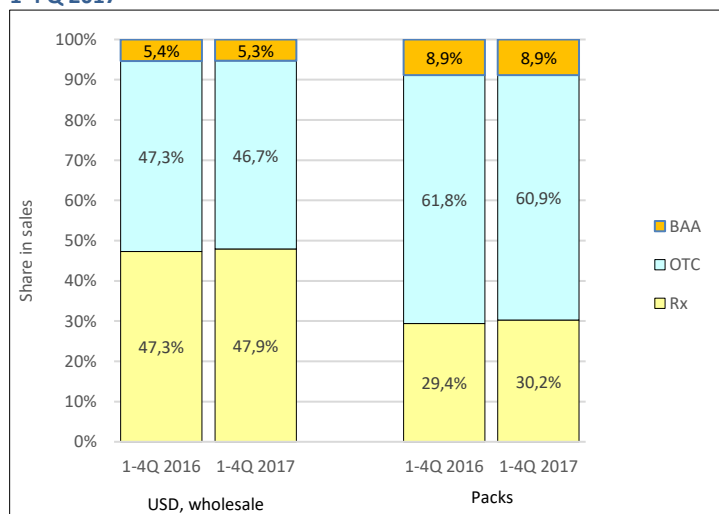## *Indicators of the dynamics and structure of the market*

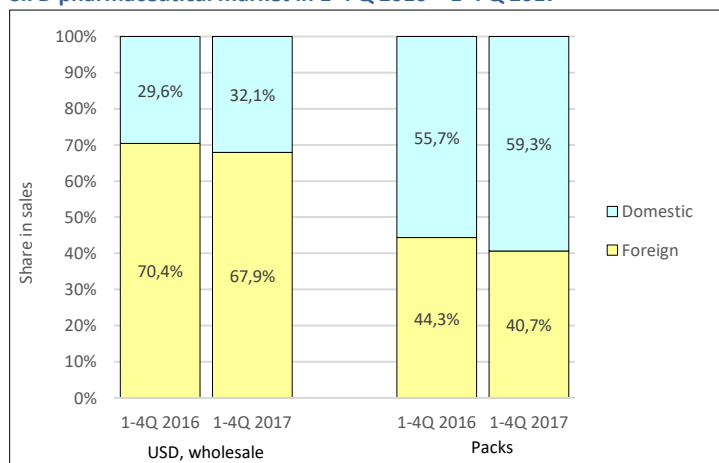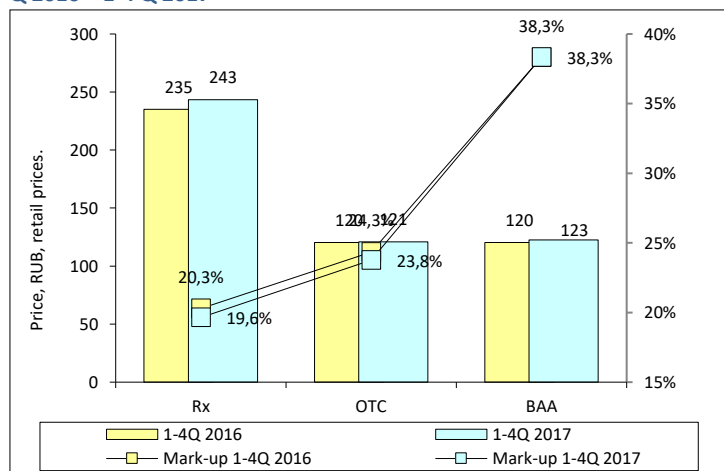**Figure 2. SFD pharmaceutical market in 1-4 Q 2016 – 1-4 Q 2017**

Figure 3. Structure of SiFD pharmaceutical market by major segments in Q 1-4, 2016 – 1-4 Q 2017

Figure 4. Structure of the retail segment of SiFD market in 1-4 Q 2016 – 1-4 Q 2017

Figure 5. Dynamics of the Russian/ foreign drugs share in the structure of SiFD pharmaceutical market in 1-4 Q 2016 – 1-4 Q 2017

PHARMACEUTICAL MARKET OF THE SOUTHERN FEDERAL DISTRICT (SoFD) IN 1-4 Q OF 2017 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	December-January 2017	December-January 2017 (%) vs. December-January 2016
Industrial production index		103.4
Retail turnover, RUB bil.	3,128.0	101.4
Monthly average accrued wage per one worker (nominal), RUB	28,653	105.7
real		101.9

Note: SoFD TOGS data

Table 2. Inflation rates in the SoFD, December 2017

	December 2017 vs. December 2016
CPI	102.1
CPI for non-food products	102.0

Indicators of price dynamics and retail margins

**Table 3. Results of the VED price monitoring conducted by Roszdravnadzor in SoFD**

	Price dynamics in December 2017 vs. December 2016 (%)		
	Retail prices	Wholesale prices	Manufacturers' prices
VED total	-2.1	-0.7	0.4
Not more than RUB 50	-2.5		
From RUB 50 to 500	-1.9		
Over RUB 500	-1.3		

Figure 1. Dynamics of weighted average prices and retail margins in 1-4 Q 2016 – 1-4 Q 2017
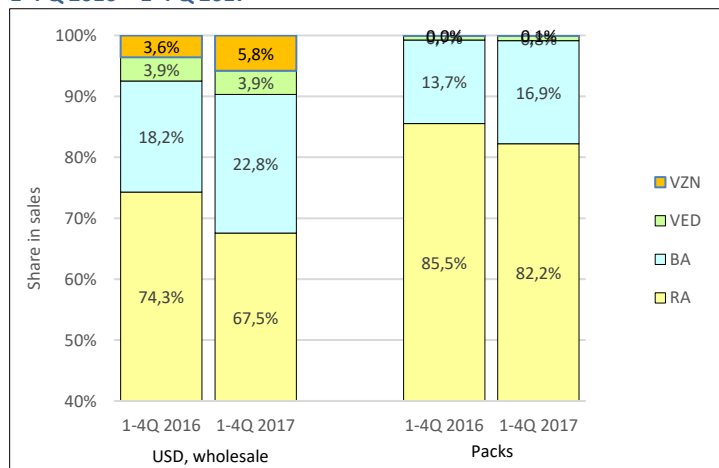

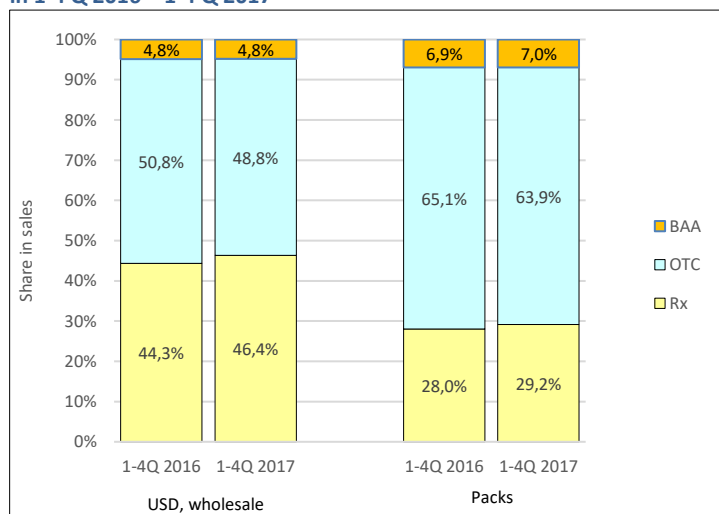## Indicators of the dynamics and structure of the market

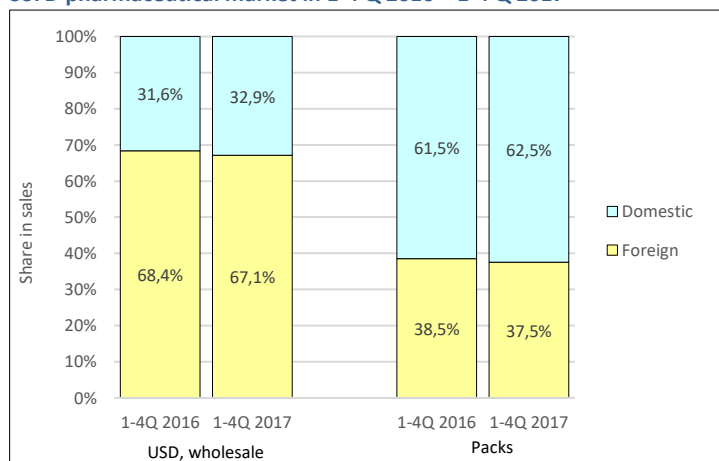**Figure 2. SoFD pharmaceutical market in 1-4 Q 2016 – 1-4 Q 2017**
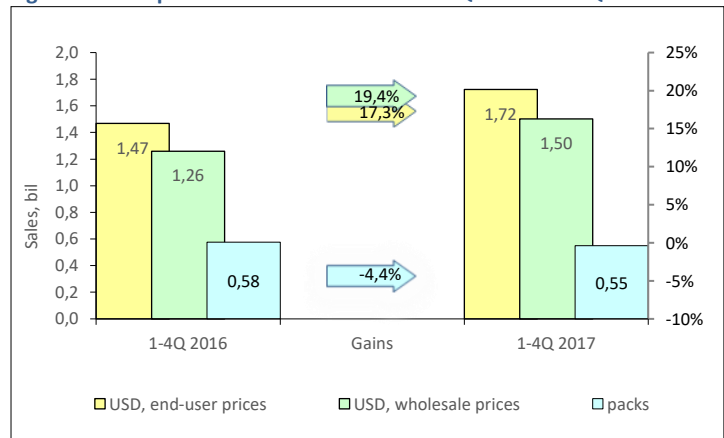
Figure 3. Structure of SoFD pharmaceutical market by major segments in 1-4 Q 2016 – 1-4 Q 2017

Figure 4. Structure of the retail segment of SoFD pharmaceutical market in 1-4 Q 2016 – 1-4 Q 2017

Figure 5. Dynamics of the Russian/ foreign drugs share in the structure of SoFD pharmaceutical market in 1-4 Q 2016 – 1-4 Q 2017

PHARMACEUTICAL MARKET OF THE FAR EASTERN FEDERAL DISTRICT (FEFD) IN 1-4 Q OF 2017 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	December-January 2017	December-January 2017 (%) vs. December-January 2016
Industrial production index		102.2
Retail turnover, RUB bil.	1,313.0	101.9
Monthly average accrued wage per one worker (nominal), RUB	49,022	106.3
real		102.9

Note: FEFD TOGS data

### Table 2. Inflation rates in the FEFD, December 2017

	December 2017 vs. December 2016
CPI	102.1
CPI for non-food products	102.5

Indicators of price dynamics and retail margins

### Table 3. Results of the VED price monitoring conducted by Roszdravnadzor in FEFD

	Price dynamics in December 2017 vs. December 2016 (%)		
	Retail prices	Wholesale prices	Manufacturers' prices
VED total	-1.1	-2.2	0.3
Not more than RUB 50	-1.5		
From RUB 50 to 500	-1.1		
Over RUB 500	1.7		

Figure 1. Dynamics of weighted average prices and retail margins in 1-4 Q 2016 – 1-4 Q 2017
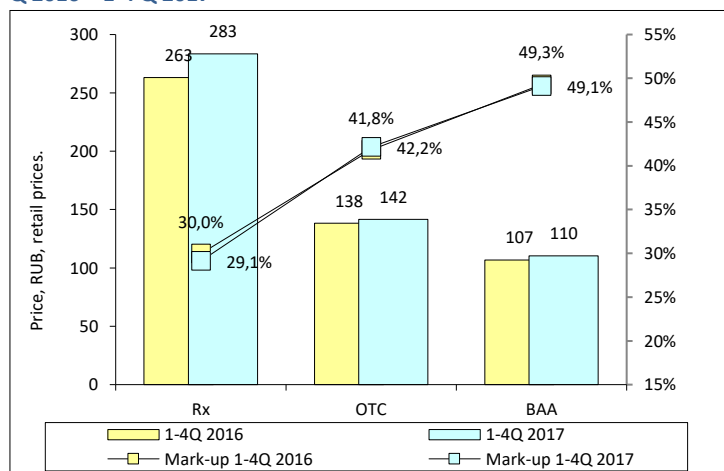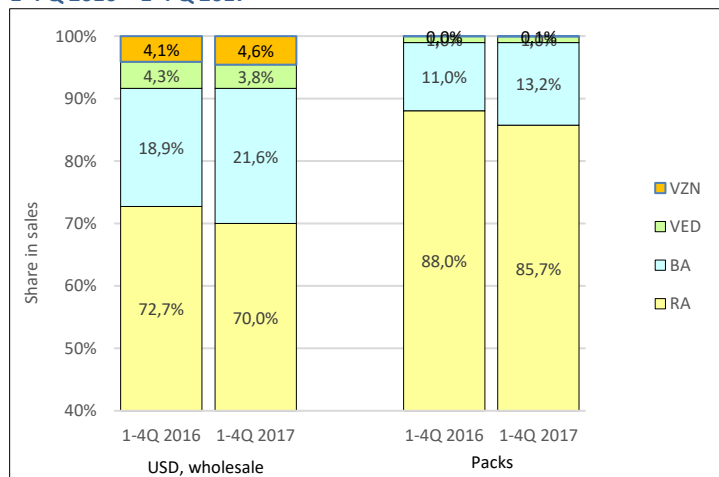
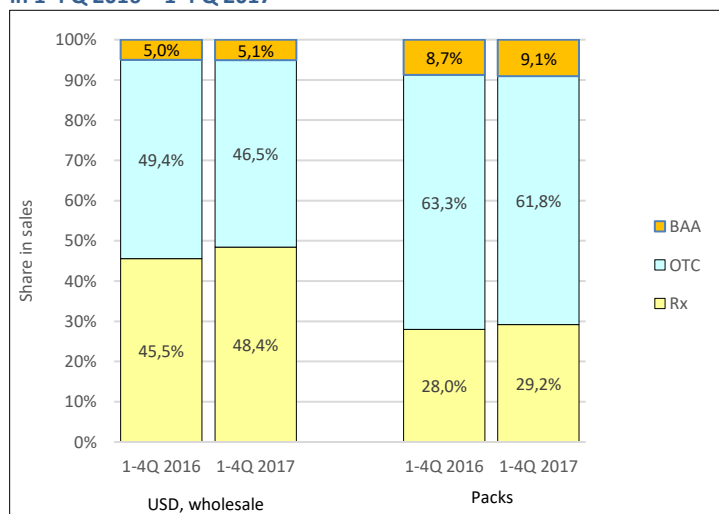

Indicators of the dynamics and structure of the market

Figure 2. FEFD pharmaceutical market in 1-4 Q 2016 – 1-4 Q 2017
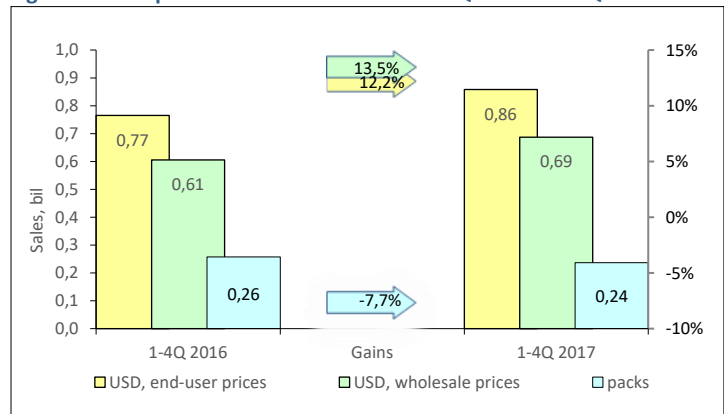
Figure 3. Structure of FEFD pharmaceutical market by major segments in 1-4 Q 2016 – 1-4 Q 2017

Figure 4. Structure of the retail segment of FEFD pharmaceutical market in 1-4 Q 2016 – 1-4 Q 2017

Figure 5. Dynamics of the Russian/ foreign drugs share in the structure of FEFD pharmaceutical market in 1-4 Q 2016 – 1-4 Q 2017