## MACROECONOMIC INDICES

Inflation

According to Federal State Statistics Service's data, the Consumer Price Index was estimated as 100.8% in October 2023 compared to the previous month, and 105.5% as compared to December 2022.

In September 2023, the Producer Price Index for industrial production was 102.0% as compared to the previous month, in the month-earlier period it had amounted to 104.7%. The index accounted for 123.1% as against December 2022.

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

Source: Rosstat
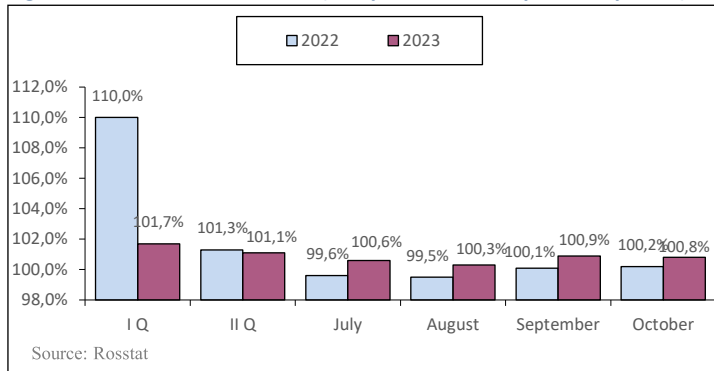
Living standard

In September 2023, a gross monthly average wage of corporate employees reached RUB 70922 (USD 733.80). It accounted for 113.6% compared to September 2022, and 102.1% compared to the previous period. In September 2023, the real gross wage accounted for 107.2% as compared to September 2022, and 101.2% against the prior period.

According to estimates[1], real disposable cash incomes accounted for 104.8% in January-September of 2023 as compared to January-September of 2022 (Fig. 2).

Retail turnover

In October 2023, the retail turnover was equal to RUB 4239.7 bil or 112.7% (in comparable prices) against the respective period of the previous year, and RUB 38270.9 bil. or 105.5% in January - October 2023 (Fig. 2).

Figure 2. Real wage and retail turnover

Source: Rosstat
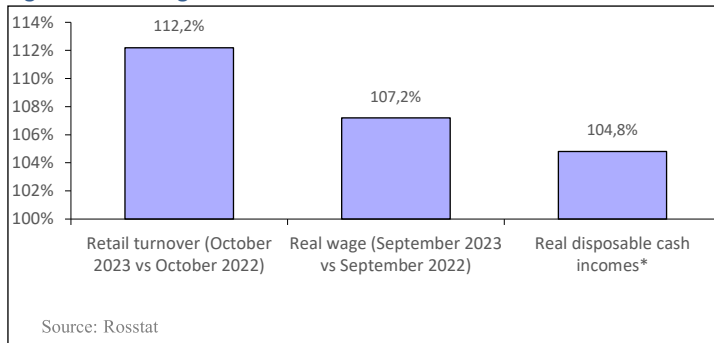
* January-September 2023 vs. January-September 2022.

Industrial Production

According to Federal State Statistics Service's data, in October 2023 Industrial Production Index accounted for 105.3% compared to the same period of the previous year, and 103.5% in January-October 2023.

According to Federal State Statistics Service's data, Industrial Production Index of drugs and medical products in October 2023 accounted for 115.2% compared to the relevant period of 2022 and 106.2% in January-October 2023. The volume of shipped drugs reached RUB 103.3 bil.

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 October 2023.

Table 1. The Top 10 Russian chemical and pharmaceutical manufacturers by sales volume in October 2023

Rank	Manufacturer	RUB mil.
1	Biocad	3759.8
2	Binnopharm Group	3411.7
3	Otcpharm	3405.9
4	Stada	3140.7
5	Pharmstandard	2672.6
6	Grotex	2211.0
7	Servier	2045.4
8	Valenta	1943.1
9	Vertex	1764.6
10	Atoll	1626.9

Source: IQVIA

Table 2 provides pharmacy sales data from 10 regions of the Russian Federation. Almost all regions showed an increase in sales in September 2023 as compared to August (in terms of roubles). The most pronounced growth in sales was observed in St. Petersburg (+27%), almost zero one in Perm (+0.1%). The sales only dropped by 3% in the Krasnodar Krai.

Table 2. Pharmacy sales in the regions, 2023

Region	Pharmacy sales, $ mil. (wholesale prices)			Growth gain, % (roubles)		
	July 2023	August 2023	September 2023	June/ July 23	August/July 23	September/ August 23
Moscow	119.8	137.0	170.5	-20%	20%	26%
St. Petersburg	56.1	64.3	80.3	-23%	21%	27%
Krasnodar Krai	50.8	63.7	60.9	5%	32%	-3%
Krasnoyarsk Krai	21.3	23.3	25.8	-6%	15%	12%
Tatarstan	22.8	23.8	26.6	-6%	10%	14%
Rostov Region	27.3	32.8	33.4	-4%	26%	3%
Novosibirsk Region	21.4	23.6	27.4	-15%	16%	18%
Voronezh Region	17.3	18.8	20.9	-9%	14%	13%
Perm	5.7	6.0	5.9	-13%	10%	0.1%
Tyumen	7.6	8.4	8.8	-10%	15%	7%

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. The Top 5 advertisers in mass media in October 2023

Rank	Company*	Amount of broadcasts
1	Materia Medica	11,333
2	Otcpharm	10,781
3	Evalar	10,356
4	Binnopharm Group	9,750
5	Nizhpharm	8,624

Source: Remedium according to Mediascope's data

Table 4. The Top 5 brand names in mass media in October, 2023

Rank	Brand*	Amount of broadcasts
1	Evalar	10,356
2	Renewal	8,283
3	Trekrezan	3,407
4	Anaferon*	3,022
5	Vitrum	2,933

Source: Remedium according to Mediascope's data

* Only drugs registered with the National Medicine Register were considered.

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[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: 2023 FIRST NINE MONTHS RESULTS

According to the results of the Retail Audit of FPP (Finished Pharmaceutical Products) in Russian Federation™, for the first nine months of 2023 the national pharmacies sold 3,229 bil. drug packs, on top of that the market volume in physical terms reduced by 1% compared to the same period in 2022. In value terms, the market potential in January-September increased by 6% in rouble terms, but decreased by 10% in dollar terms and its volume amounted to RUB 875.885 bil. (USD 10.694 bil.) in wholesale prices (Fig. 1). The average cost of an OTC pack at retail prices proved to be lower than the past year figure: USD 4.09 in January-September of 2023 vs USD 4.52 in 2022. Consumer spending for drugs in Russia averaged to USD 90.09 for 9 months of 2023, whereas during the same period a year ago it averaged to USD 100.91.

Figure 1. Russia pharmacy market for 3 months of 2022 – 9 months 2023*
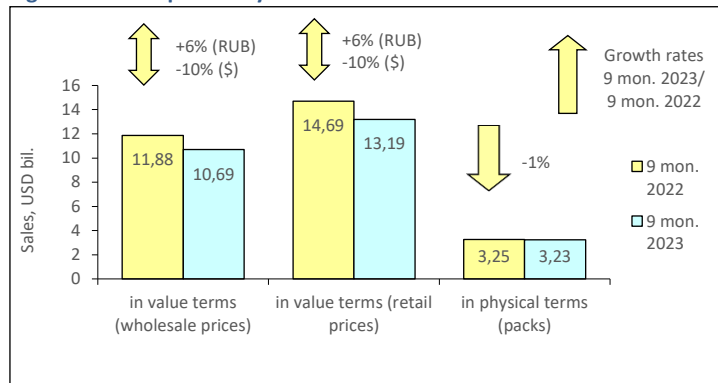
Based on the results for January-September 2023, BAYER (-3%[2]) и STADA (+9%) held their leading positions in the Top-10 manufacturers ranking in the Russian retail market despite the decline in sales and market share of the former (Table 1). Also, another four companies held their own in the ranking. SANOFI (-1%), TEVA (+8%) and ABBOTT (+4%) held their prior ranks five through seven, while GEDEON RICHTER (+7%) continued to maintain the last one. SERVIER (+6%), KRKA (+12%) and BINNOPHARM (+28%) were able to improve their ratings, moving up to ranks three, four and nine, respectively. Note that the latter broke into the Top 10 ranking for the first time. At the same time, OTCPHARM (-17%), which showed a pronounced decrease in sales, on the contrary, moved down from the top three to rank eight. The total share of the top-10 reduced from 31.7% to 31.1%.

Table 1. The Top 10 drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	1	**BAYER**	4.2	4.6
2	2	**STADA**	4.0	3.9
3	4	**SERVIER**	3.3	3.2
4	8	**KRKA**	3.0	2.9
5	5	**SANOFI**	3.0	3.2
6	6	**TEVA**	3.0	2.9
7	7	**ABBOTT**	2.8	2.9
8	3	OTCPHARM	2.8	3.6
9	12	BINNOPHARM GROUP	2.6	2.2
10	10	GEDEON RICHTER	2.4	2.3
Total			31.1	31.7

*AIPM members are in bold

Two newcomers broke into the ranks of the top ten brands ranking (table 2). EDARBI (+28%) and PENTALGIN (+8%) moved up to ranks six and seven of the Top 10. In addition to them, the other six brands of the Top 10 moved up to yet higher ranks. Four of them, ELIQUIS (-8%), DETRALEX (+4%), NUROFEN (+12%) and HEPTRAL (+5%) moved up to ranks two through five, respectively. The brands MEXIDOL and THERAFLU (-2% each) were able to move one rank up, to numbers nine and ten. INGAVIRIN (-15%) rounded out the Top 10, moving down from rank six, while XARELTO (-6%) continued to remain its leader. In total, the Top 10 brands accounted for 6.7% of the sales, whereas in the year–earlier period they had accounted for 7.1%.

Table 2. The Top 10 brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	1	XARELTO	1.1	1.2
2	3	ELIQUIS	0.9	1.1
3	4	DETRALEX	0.7	0.7
4	5	NUROFEN	0.7	0.7
5	7	HEPTRAL	0.6	0.6
6	16	EDARBI	0.6	0.5
7	11	PENTALGIN	0.6	0.5
8	9	MEXIDOL	0.5	0.6
9	10	THERAFLU	0.5	0.6
10	6	INGAVIRIN	0.5	0.6
Total			6.7	7.1

The Top INN and group names leader managed to hold its own in the ranking: XYLOMETAZOLINE (+6%) held its previous rank number one (Table 3). They were followed by the more dynamic DIOSMIN*HESPERIDIN (+10%) and IBUPROFEN (+14%), which moved up to ranks two and three from four and five. INNs PANCREATIN (+11%) and HYALURONIC ACID (+31%) also showed positive growth rates and rose in the ranks, moving up to positions six and nine, respectively. On top of that, the latter became the only newcomer of the top 10 ranking. NIMESULIDE was able to move one rank up, to rank five, despite a 1% decline in sales. RIVAROXABAN (-6%), APIXABAN (-8%) and BISOPROLOL (-0.5%) also showed negative growth rates. At the same time, the former one moved one rank down, to rank four, while the other two retained ranks seven and eight. ROSUVASTATIN (+5%) that rounded out the Top 10 also held its previous rank. The cumulative share of the Top 10 under consideration did not virtually change: 10,5% vs 10,6% in the year-earlier period.

Table 3. The Top 10 INNs and generic names by pharmacy sales

Rank		INN/Generic name	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	1	XYLOMETAZOLINE	1.5	1.5
2	4	DIOSMIN*HESPERIDIN	1.3	1.2
3	5	IBUPROFEN	1.2	1.1
4	3	RIVAROXABAN	1.1	1.2
5	6	NIMESULIDE	1.0	1.1
6	9	PANCREATIN	1.0	0.9
7	7	APIXABAN	0.9	1.1
8	8	BISOPROLOL	0.9	0.9
9	12	HYALURONIC ACID	0.9	0.7
10	10	ROSUVASTATIN	0.8	0.8
Total			10.5	10.6

In contrast to the above ratings, the Top 10 ATC - groups ranking changed its leader (Table 4). M01 Anti-inflammatory and antirheumatic products (+11%) moved up to rank one from two, displacing the less dynamic C09 Agents acting on the rennin-angiotensin system (+8%) one rank down. They were followed by G03 Sex hormones (+8%) which showed the same growth rates, moving up to rank three from five. The other four brands of the Top 10 moved up to yet higher ranks. R01 Nasal preparations (+11%), N06 Psychoanaleptics (+12%) and C05 Vasoprotectives (+10%) as well as the newcomer J01 Antibacterials for systemic use (+16%) moved up to ranks four, seven and eight. Slightly less dynamic N02 Analgesics (+9%) retained rank six. Two groups reduced sales and fell to lower positions. B01 Antithrombotic agents (-7%) and J05 Antivirals for systemic use (-23%) moved up to ranks five and ten of the ranking. Its consolidated share reduced from 37.9% to 37.6%.

Table 4. The Top 10 ATC groups by pharmacy sales

| Rank		ATC code	ATC group	Share in total pharmacy sales, %	
9 mon. 2023	9 mon. 2022			9 mon. 2023	9 mon. 2022
1	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.5	5.2
2	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.4	5.3
3	5	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.9	3.8
4	7	R01	NASAL PREPARATIONS	3.7	3.5
5	3	B01	ANTITHROMBOTIC AGENTS	3.7	4.2
6	6	N02	ANALGESICS	3.6	3.5
7	8	N06	PSYCHOANALEPTICS	3.1	2.9
8	9	C05	VASOPROTECTIVES	3.0	2.9
9	11	J01	ANTIBACTERIALS FOR SYST USE	2.9	2.6
10	4	J05	ANTIVIRALS FOR SYSTEMIC USE	2.8	3.9
Total				37.6	37.9

Conclusion. In January-September of 2023, the retail pharmacy market of the country reached RUB 1080 bil. (USD 13.194 bil.), as compared with the same period of 2022, the growth rates were positive both (+6%) in terms of roubles, but negative in terms of dollars (-10%). In pack terms, the market reduced by 1% compared to the prior year and amounted to 3.0229 bil. packs. In a period of 9 months of 2023, the average cost of an FPP pack in the national pharmacies was USD 4.09, whereas in the year-earlier period it was USD 4.52. The average expenses of the Russian Federation residents for purchase of drugs in the pharmacies based on the results for the first 9 months of 2023 decreased as compared to 2022 (USD 90.09 vs. USD 100.91).

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* Here and elsewhere IQVIA's data are used

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

RUSSIAN FEDERATION HOSPITAL MARKET: 2023 FIRST NINE MONTHS RESULTS

According to the results of the Budget Audit of Finished Pharma Products (FFP) in the Russian Federation (without DLO and regional benefit)™, in January-September of 2023 the public procurement segment of the country in physical terms reduced by 18% as compared to the same period of the previous year and amounted to 254.187 mil. packs. In money terms, the market also showed negative growth rates both in terms of roubles (-11%) and in terms of dollars (-25%) and reached RUB 333.142 bil. (USD 4.064 mil.) at wholesale prices. Based on the results for 9 months of 2022, the average cost of an FPP pack in the public procurement sector was USD 15.99, whereas in the year-earlier period its cost was USD 17.43.

Figure 1. Russia public sector for 9 months of 2022 – 9 months 2023*
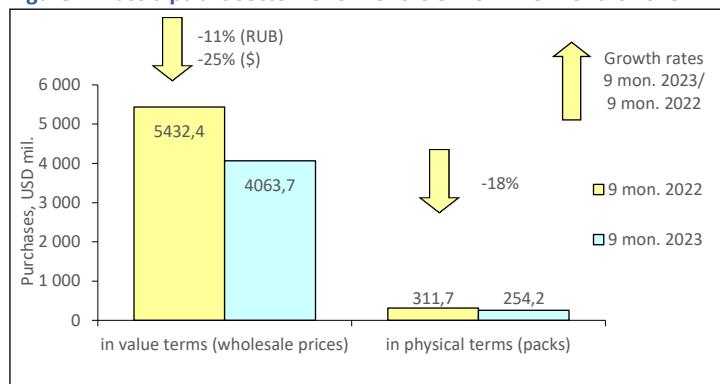
Based on the results for the first nine months of 2023, most public procurement manufacturers of the Top 10 showed negative growth rates (Table 1). MSD (-43%) showed the most pronounced sales growth, which due to this moved down from rank one to four. At the same time, ROCHE (+12%), BIOCAD (-6%) and NOVARTIS (-1%) moved one rank up, coming in at the top three positions. BAYER (-12%) moved two ranks up, to number ten, despite a decrease in purchase volumes, and at the same time became one of three newcomers. Two more newcomers that broke into the Top 10 for the first time, MICROGEN (2.1-fold growth in purchases) and SANOFI (+2%) moved up to ranks six and nine, respectively. On top of that, JOHNSON & JOHNSON (+32%) moved three ranks up, to number five. At the same time, BRISTOL MYERS (-17%) and ASTRAZENECA (-10%) had lower sales and moved one position down to ranks seven and eight. In total, the Top 10 manufacturers accounted for 47.6% of the public procurement segment, which was 3.6 p.p. more than the year-earlier period figure.

Table 1. The Top 10 manufacturers by public segment volume

Rank in the top ten		Manufacturer*	Share in total public segment, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	2	**ROCHE**	9.3	7.4
2	3	BIOCAD	6.9	6.5
3	4	**NOVARTIS**	5.2	4.7
4	1	MSD	5.1	7.9
5	8	**JOHNSON & JOHNSON**	4.9	3.3
6	15	MICROGEN	3.8	1.6
7	6	BRISTOL MYERS SQU	3.7	4.0
8	7	**ASTRAZENECA**	3.7	3.7
9	14	**SANOFI**	2.6	2.3
10	12	**BAYER**	2.5	2.5
Total			47.6	44.0

*AIPM members are in bold

Four brands broke into the Top 10 brands ranking in the country's public procurement segment (Table 2). Two of them, SOVIGRIPP (2.9-fold growth in purchases) and SPINRAZA (3.1-fold growth), moved up to ranks two and three, and TRANSLARNA (2.2-fold growth) and PEMBRORIA moved up to ranks six and seven, respectively. In addition to them, two more brand names from the Top 10 rating made advances: Despite negative growth rates OPDIVO (-17%) became its leader, and EVRYSDI (+48%) moved up to rank five from eight. At the same time, KEYTRUDA (-54%), PERJETA (+1%), ZOLGENSMA (-19%) and KADCYLA (+2%) moved down to lower ranks, fourth and three bottom ones. The total share of the Top 10 brands in the public procurement segment expanded by over 6 p.p. from 17.9% to 24.2%.

Table 2. The top 10 brands by public segment volume

Rank in the top ten		Brand	Share in total public segment, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	2	OPDIVO	3.0	3.2
2	16	SOVIGRIPP	2.9	0.9
3	17	SPINRAZA	2.8	0.8
4	1	KEYTRUDA	2.5	4.9
5	8	EVRYSDI	2.4	1.4
6	14	TRANSLARNA	2.4	1.0
7	N/A	PEMBRORIA	2.3	N/A
8	6	PERJETA	2.1	1.8
9	3	ZOLGENSMA	2.0	2.2
10	7	KADCYLA	1.8	1.6
Total			24.2	17.9

PEMBROLIZUMAB continued to be the leader of the Top 10 INN and grouping names ranking though its purchases reduced by 11% (Table 3). On the contrary, INN VACCINE, INFLUENZA, which showed one of the highest growth rates (2.9-fold growth in purchases), moved up to rank two from ten. NUSINERSEN (3.1-fold growth) and ATALUREN (2.2-growth), which broke into the Top 10 for the first time, also showed multiple growth in volumes, moving up to positions four and seven. At the same time, they displaced SANOFI (-17%) and BEVACIZUMAB (+5%) one rank down. PERTUZUMAB (+1%), ONASEMNOGENE ABEPARVOVEC (-19%) and TRASTUZUMAB EMTANSINE (+2%) that moved down to the lower positions rounded out the Top 10 ranking. The total share of the Top 10 increased from 20.4% to 28.2%.

Table 3. The Top 10 INNs and generic names by public segment volume

Rank		INN/Generic name	Share in total public segment, %	
9 mon. 2023	9 mon. 2022		9 mon. 2023	9 mon. 2022
1	1	PEMBROLIZUMAB	4.9	4.9
2	10	VACCINE, INFLUENZA	4.4	1.3
3	2	NIVOLUMAB	3.0	3.2
4	19	NUSINERSEN	2.8	0.8
5	4	BEVACIZUMAB	2.5	2.2
6	8	RISDIPLAM	2.4	1.4
7	16	ATALUREN	2.4	1.0
8	6	PERTUZUMAB	2.1	1.8
9	3	ONASEMNOGENE ABEPARVOVEC	2.0	2.2
10	7	TRASTUZUMAB EMTANSINE	1.8	1.6
Total			28.2	20.4

The leader of the Top 10 ATC-groups ranking also managed to hold its own in the ranking: L01 Antineoplastic agents (+4%) kept and reinforced its first position in the public procurement segment (Table 4). The remaining ATC groups from the Top 10 ranking shifted their ranks; most of them rose in the ranks. The groups M09 Other drugs for disorders of the musculo-skeletal system (+57%) and J07 Vaccines (+59%) moved up to the top three positions from four and five. J01 Antibacterials for systemic use (-23%), B05 Blood substitutes and perfusion solutions (+5%) and L02 Antineoplastic agents (+21%) moved up to ranks five through seven. The newcomer A16 Other alimentary tract and metabolism products (+15%) broke into the Top 10 ranking, coming in at number nine. At the same time, J05 Antivirals for systemic use (-58%), B01 Antithrombotic agents (-50%) and L04 Immunosuppressants (-67%) that showed strong negative growth rates moved down to ranks four, eight and ten. The total share of the Top 10 ATC groups shrank from 81.3% to 80.0%.

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

Rank		ATC code	ATC group	Share in total public procurement segment, %	
9 mon. 2023	9 mon. 2022			9 mon. 2023	9 mon. 2022
1	1	L01	ANTINEOPLASTIC AGENTS	35.4	30.6
2	4	M09	OTHER DRUGS FOR DISORDERS OF THE MUSCULO-SKELETAL SYSTEM	9.6	5.5
3	5	J07	VACCINES	9.5	5.3
4	2	J05	ANTIVIRALS FOR SYSTEMIC USE	8.6	18.4
5	7	J01	ANTIBACTERIALS FOR SYST USE	3.9	4.5
6	8	B05	BLOOD SUBSTITUTES AND PERFUSION SOLUTIONS	3.1	2.6
7	10	L02	ENDOCRINE THERAPY	2.8	2.0
8	6	B01	ANTITHROMBOTIC AGENTS	2.6	4.6
9	11	A16	OTHER ALIMENTARY TRACT AND METABOLISM PRODUCTS	2.5	2.0
10	3	L04	IMMUNOSUPPRESSANTS	2.1	5.7
Total				80.0	81.3

Conclusion. Based on the results for nine months of 2023, the public procurement segment of Russia reduced by 11% in rouble terms and by 25% in dollar terms, and stood at RUB 333.142 bil. (USD 4.064 bil.). In natural terms, the public procurement segment decreased by 18% to 254.187 mil. packs. In the period under review, the average cost of a finished pharma product (FPP) pack in the public sector of the country amounted to USD 15.99 vs. USD 17.43 in the year earlier period.

* Here and elsewhere IQVIA's data are used

Macroeconomic indices

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

| Value	January-September 2023	January-September as % of January-September 2022
Industrial production index		111.5
Retail turnover, RUB bil.	11,282.8	103.4
Monthly average accrued wage per worker (nominal), RUB	87,718	111.5
real		105.4

Note: CFD TOGS data

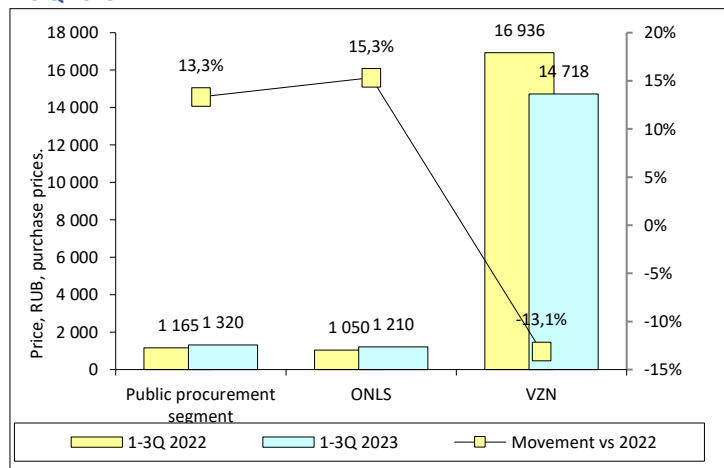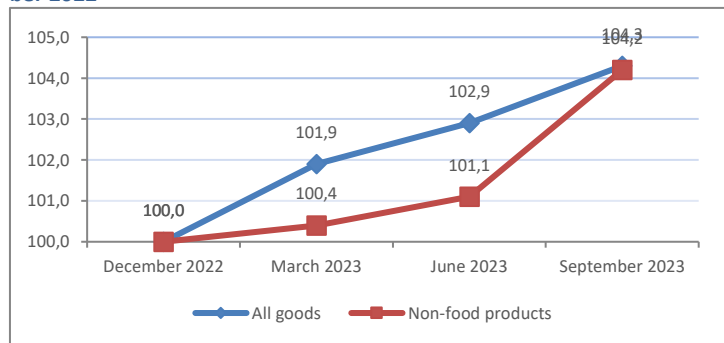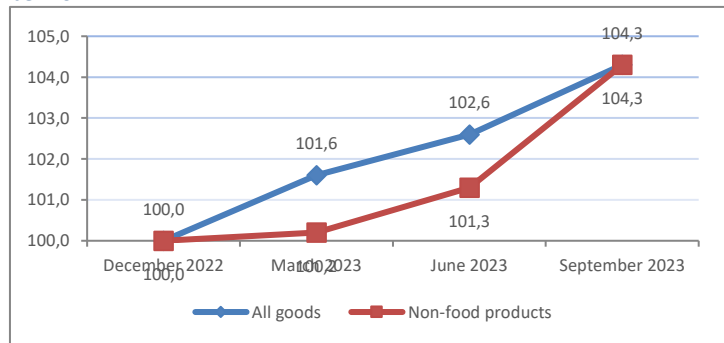**Figure 1. Movement of price index and non-foods price index vs December 2022**
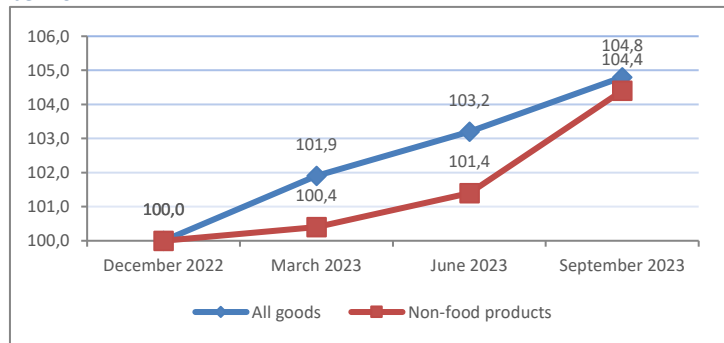
Indicators of movement of prices and retail margins (according to IQVIA data)

**Figure 1. Movement of weighted average prices and retail margins in 1-3 Q 2022–1-3 Q 2023***
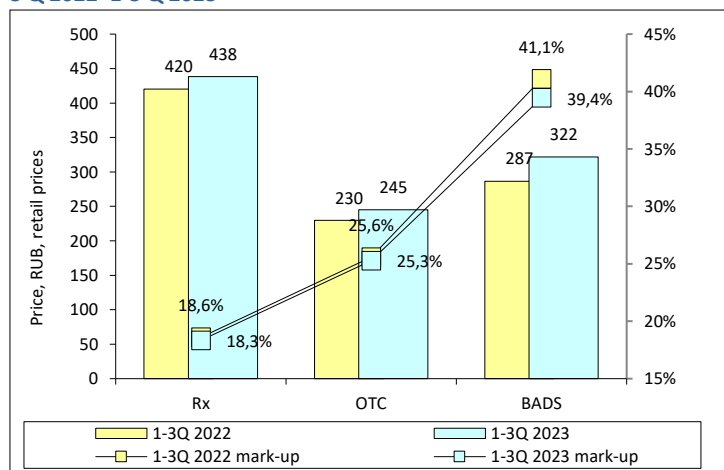
**Figure 2. Movement of weighted average purchase prices in 1-3 Q 2022–1-3 Q 2023**

Indicators of the market movement and profile[3] (according to IQVIA data)
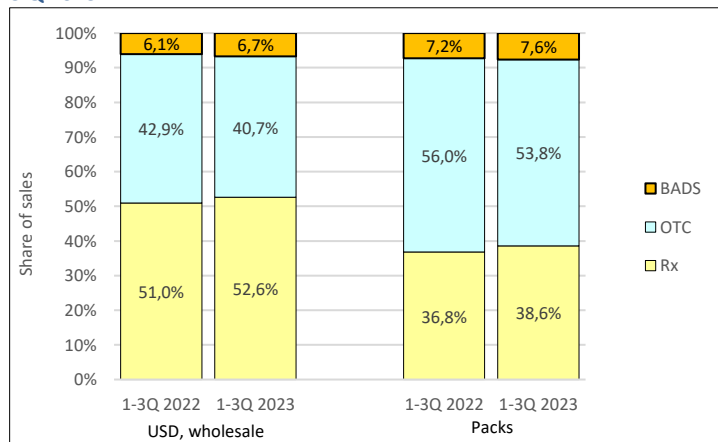
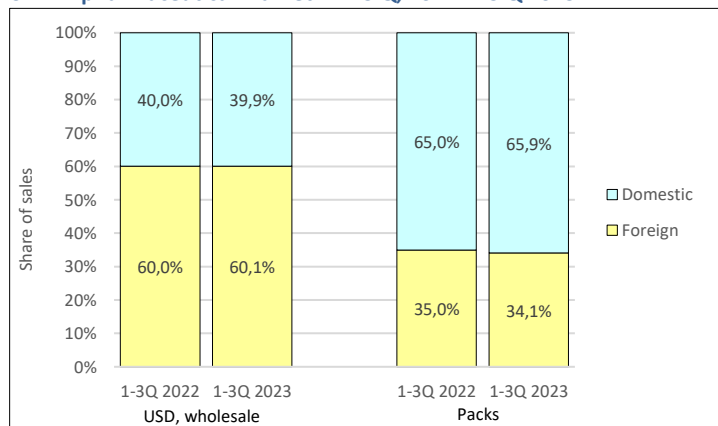**Figure 3. CFD pharmaceutical market in 1-3 Q, 2022–1-3 Q 2023**
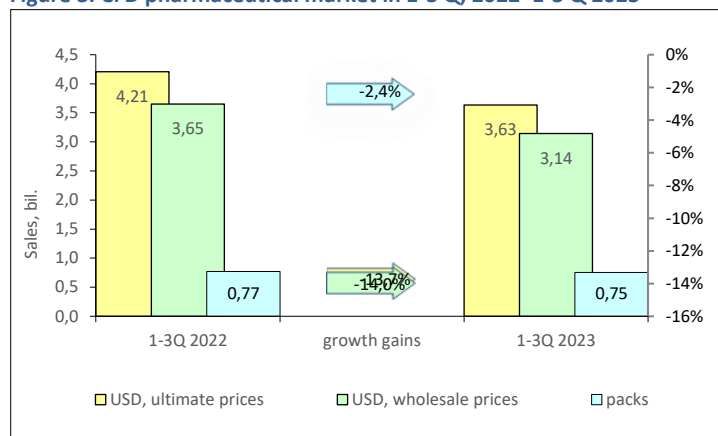
Figure 4. Major sector profile of CFD pharmaceutical market in 1-3 Q, 2022–1-3 Q 2023
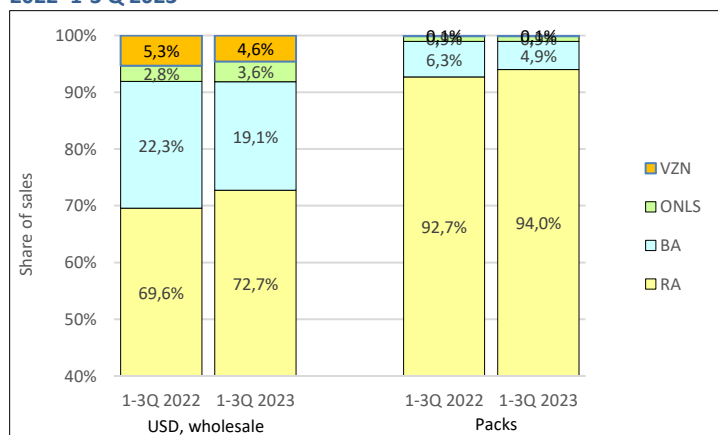
Figure 5. Structure of the retail segment of CFD market in 1-3 Q, 2022–1-3 Q 2023
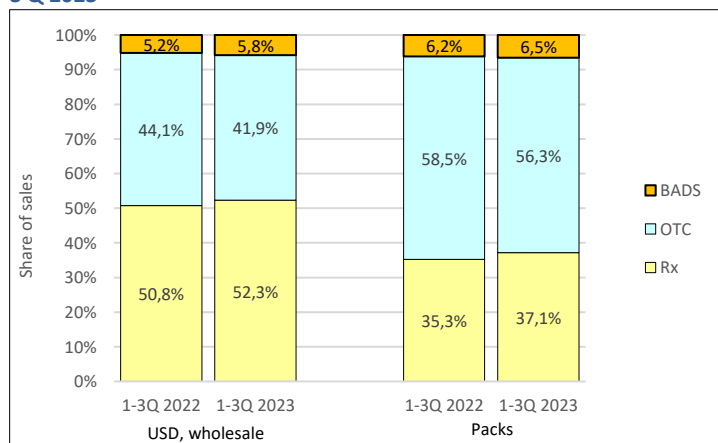
Figure 6. Movement of the Russian/foreign drugs share in the structure of CFD pharmaceutical market in 1-3 Q, 2022–1-3 Q 2023

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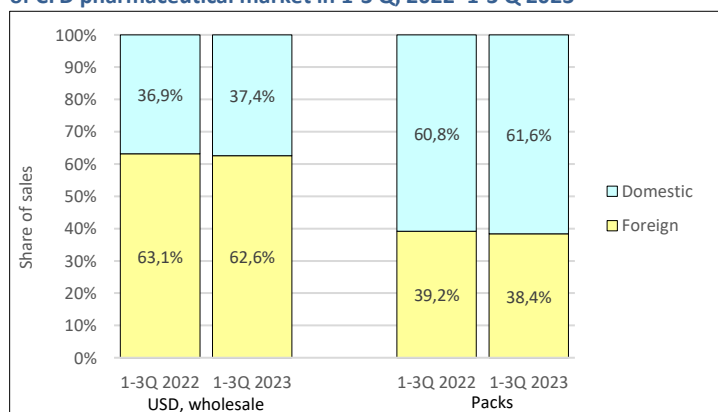
* Here and elsewhere IQVIA's data are used

[3] Exclusive of Moscow

PHARMACEUTICAL MARKET OF THE NORTH-WESTERN FEDERAL DISTRICT (NWFD) IN 1-3 Q 2023 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

| Value	January-September 2023	January-September as % of January-September 2022
Industrial production index		103.1
Retail turnover, RUB bil.	3,530.5	104.7
Monthly average accrued wage per worker (nominal), RUB	77,666	112.4
real		106.5

Note: NWFD TOGS data

### Figure 1. Movement of price index and non-foods price index vs December 2022

Indicators of movement of prices and retail margins (according to IQVIA data)

### Figure 1. Movement of weighted average prices and retail margins in 1-3 Q 2022–1-3 Q 2023*
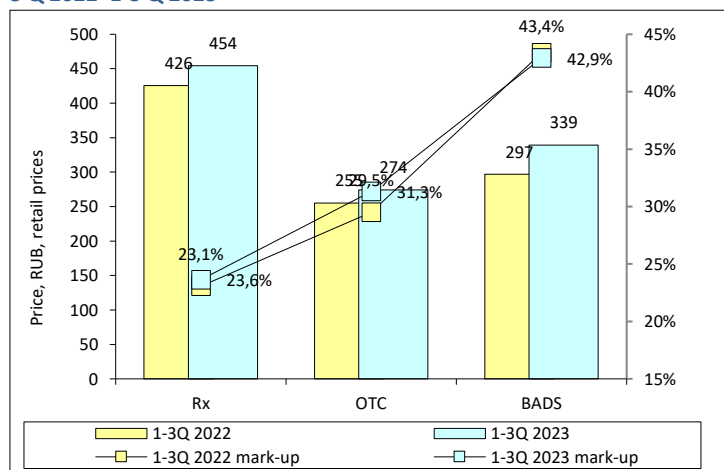
Figure 2. Movement of weighted average purchase prices in 1-3 Q 2022–1-3 Q 2023
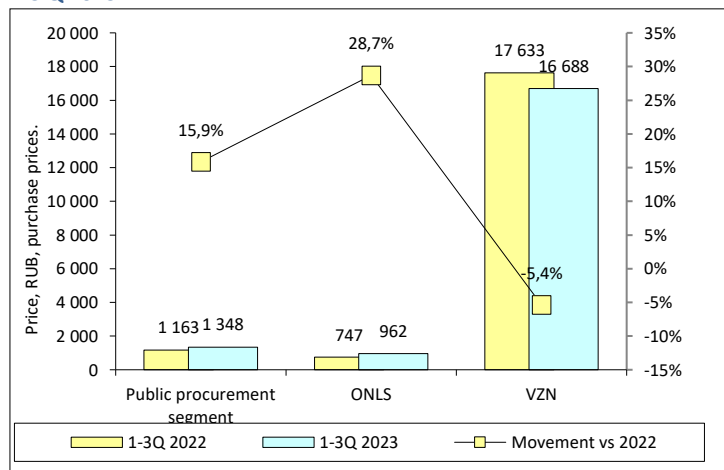
Indicators of the market movement and profile[4] (according to IQVIA data)

Figure 3. NWFD pharmaceutical market in Q 1-3, 2022–1-3 Q 2023
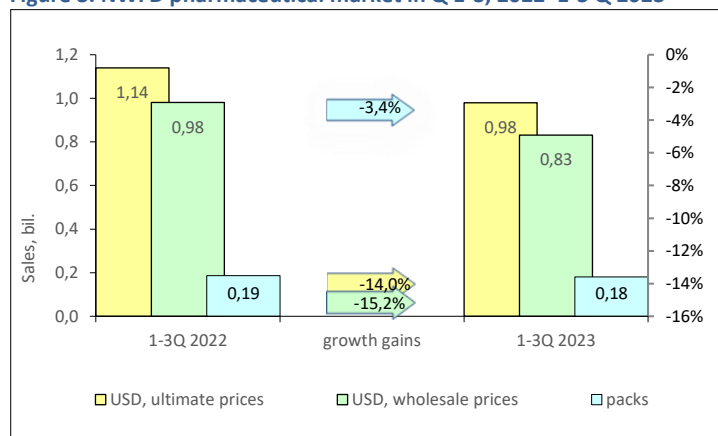
Figure 4. Major sector profile of NWFD pharmaceutical market in 1-3 Q, 2022–1-3 Q 2023
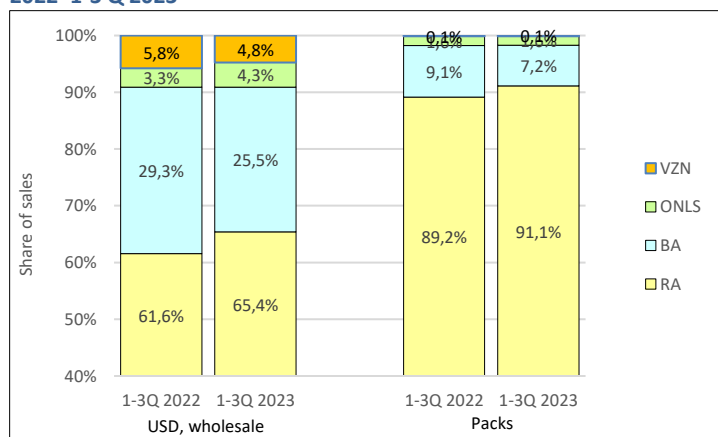
Figure 5. Structure of the retail segment of NWFD pharmaceutical market in 1-3 Q, 2022–1-3 Q 2023
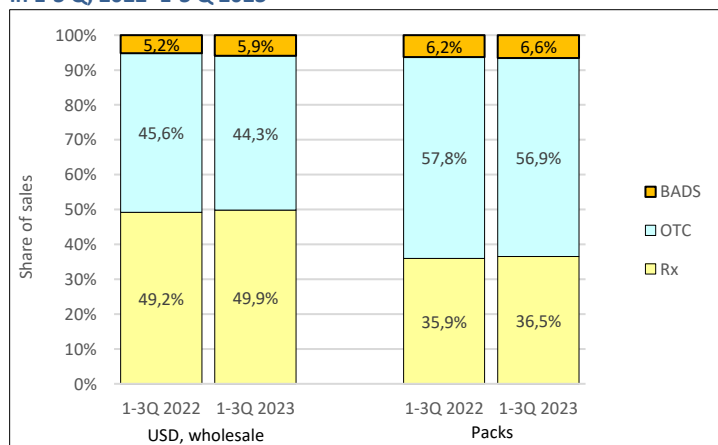
Figure 6. Movement of the Russian/ foreign drugs share in the structure of NWFD pharmaceutical market in 1-3 Q, 2022–1-3 Q 2023

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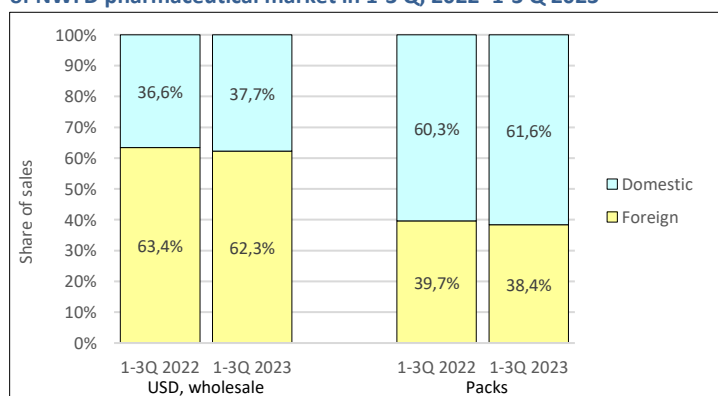
* Here and elsewhere IQVIA's data are used

4 Exclusive of St. Petersburg

PHARMACEUTICAL MARKET OF THE VOLGA FEDERAL DISTRICT (VFD) IN 1-3 Q 2023 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	January-September 2023	January-September as % of January-September 2022
Industrial production index		106.4
Retail turnover, RUB bil.	5,912.6	107.4
Monthly average accrued wage per worker (nominal), RUB	52,506	116.4
real		111.0

Note: VFD TOGS data

Figure 1. Movement of price index and non-foods price index vs December 2022

Indicators of movement of prices and retail margins (according to IQVIA data)

Figure 1. Movement of weighted average prices and retail margins in 1-3 Q 2022–1-3 Q 2023*
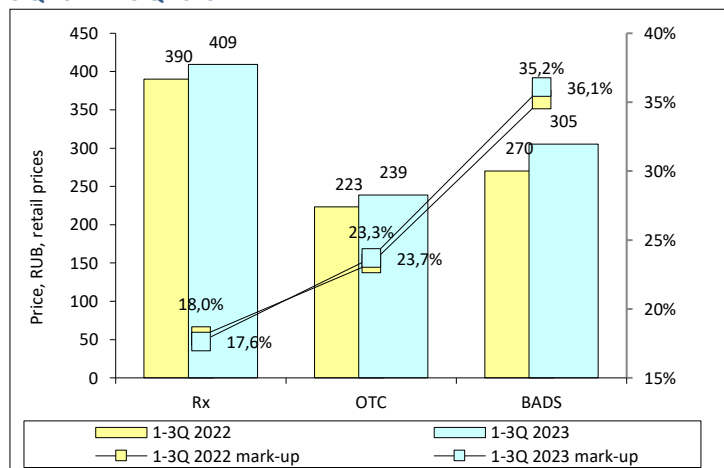
**Figure 2. Movement of weighted average purchase prices in 1-3 Q 2022–1-3 Q 2023**
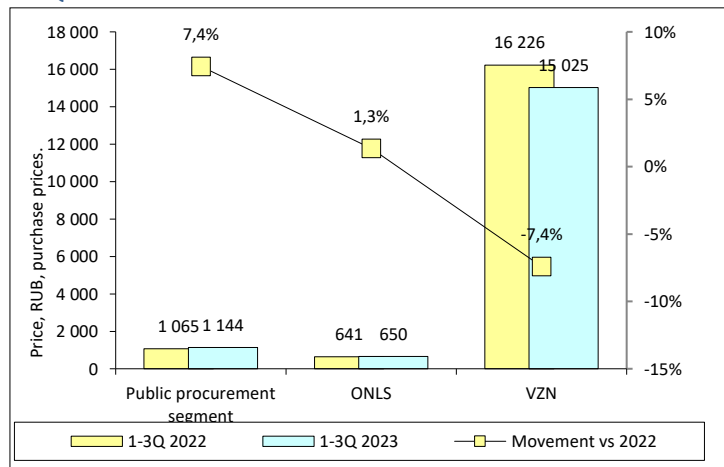
## Indicators of the market movement and profile (according to IQVIA data)

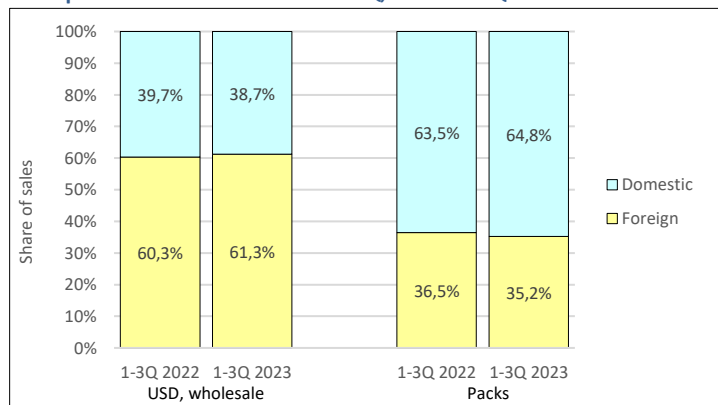**Figure 3. VFD pharmaceutical market in 1-3 Q, 2022–1-3 Q 2023**
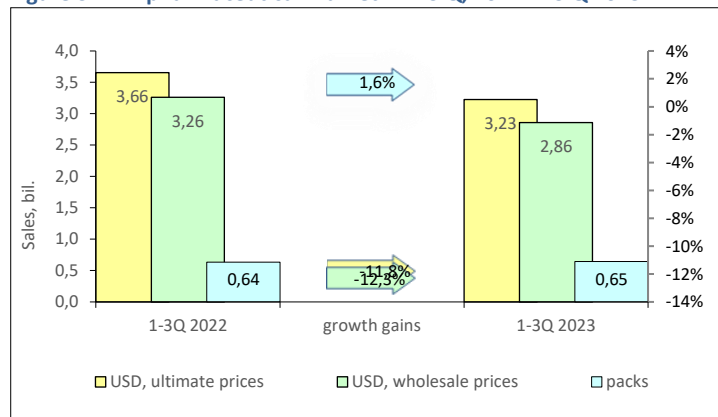
Figure 4. Major sector profile of VFD pharmaceutical market in 1-3 Q, 2022–1-3 Q 2023
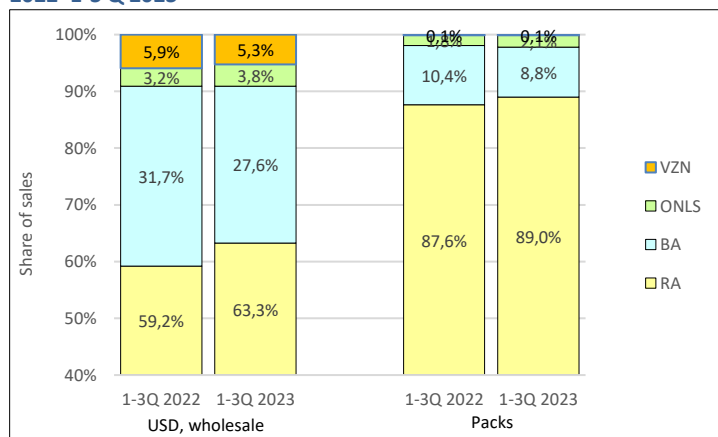
Figure 5. Structure of the retail segment of VFD market in 1-3 Q, 2022–1-3 Q 2023

Figure 6. Movement of the Russian/foreign drugs share in the structure of VFD pharmaceutical market in 1-3 Q, 2022–1-3 Q 2023

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* Here and elsewhere IQVIA's data are used

PHARMACEUTICAL MARKET OF THE URAL FEDERAL DISTRICT (UFD) IN 1-3Q 2023 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	January-September 2023	January-September as % of January-September 2022
Industrial production index		101.1
Retail turnover, RUB bil.	2,739.9	108.8
Monthly average accrued wage per worker (nominal), RUB	75,105	113.6
real		109.2

Note: VFD TOGS data

Figure 1. Movement of price index and non-foods price index vs December 2022
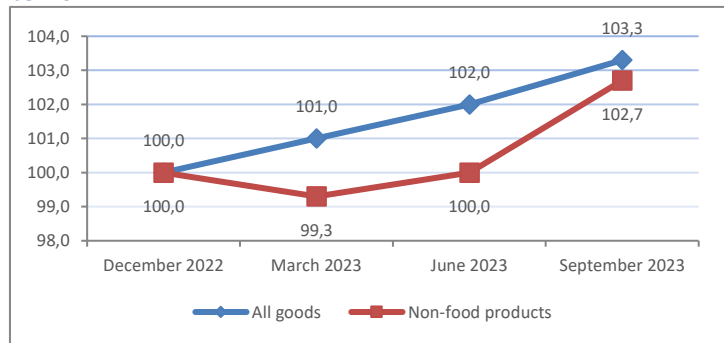
Indicators of movement of prices and retail margins (according to IQVIA data)

Figure 1. Movement of weighted average prices and retail margins in 1-3 Q 2022–1-3 Q 2023*
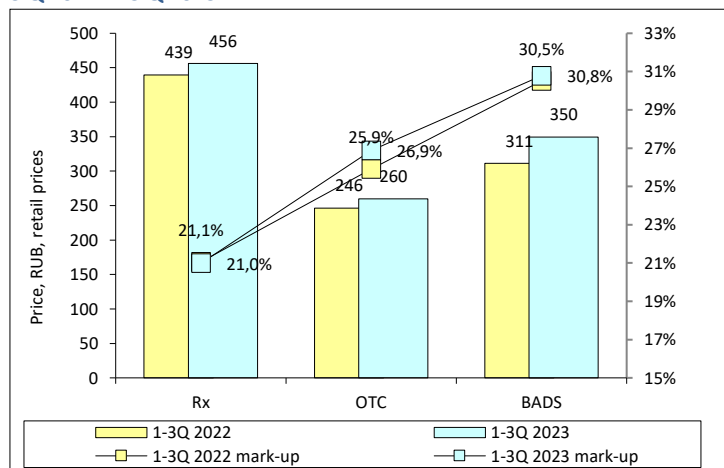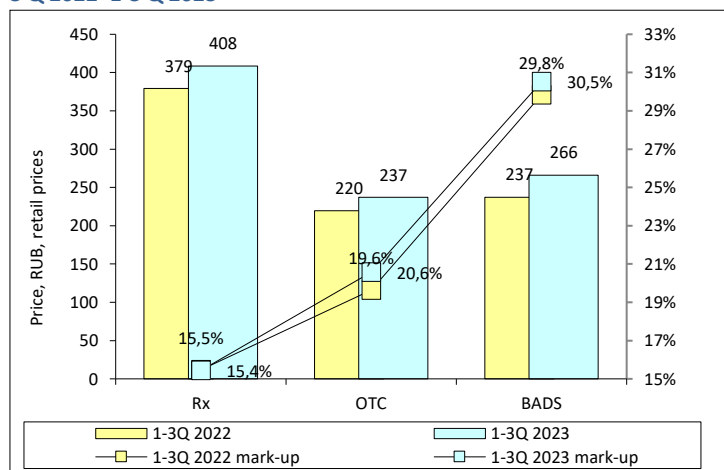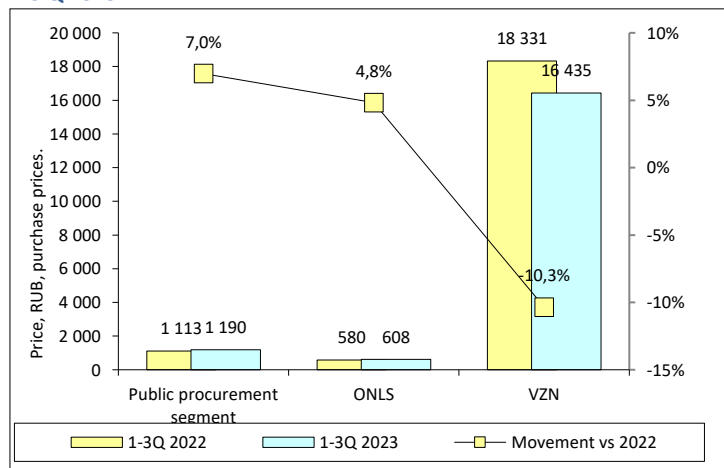

Figure 2. Movement of weighted average purchase prices in 1-3 Q 2022–1-3 Q 2023
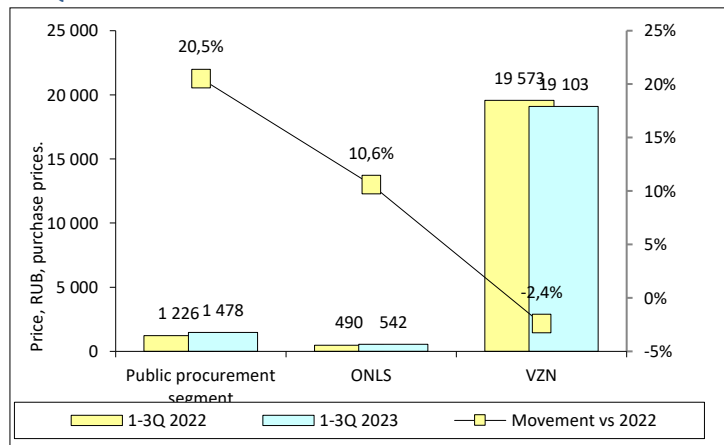
Indicators of the market movement and profile (according to IQVIA data)

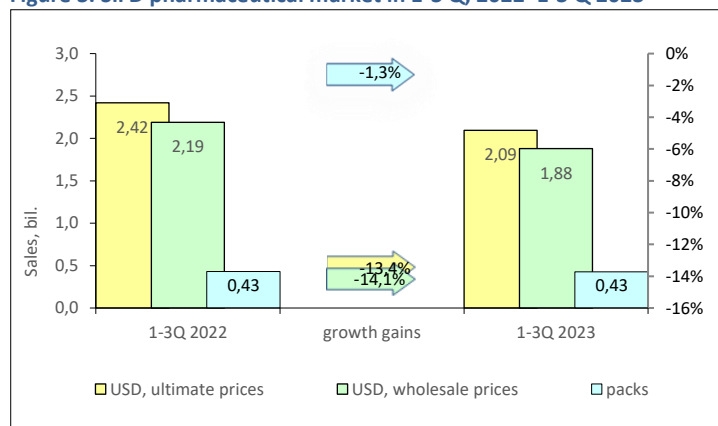### Figure 3. UrFD pharmaceutical market in 1-3 Q, 2022–1-3 Q 2023
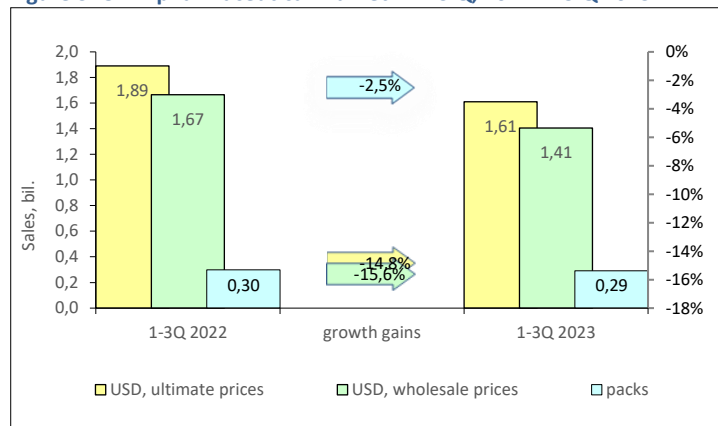
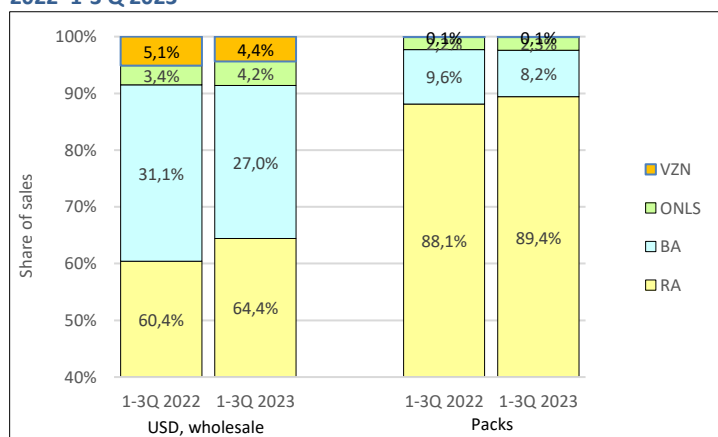### Figure 4. Major sector profile of UFD pharmaceutical market in 1-3 Q, 2022–1-3 Q 2023
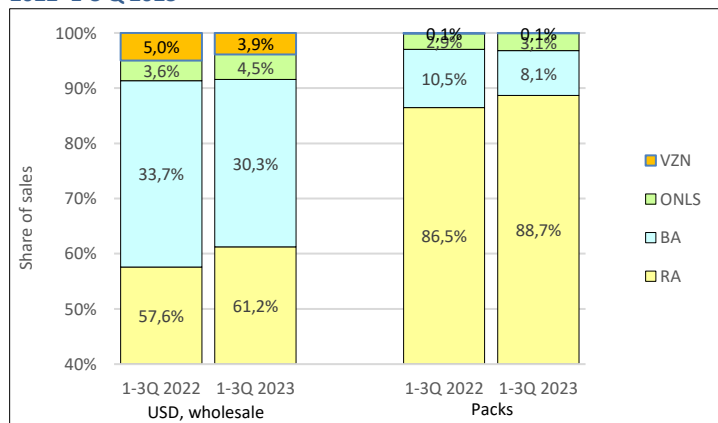
Figure 5. Retail sector profile of UrFD pharmaceutical market in 1-3 Q, 2022–1-3 Q 2023
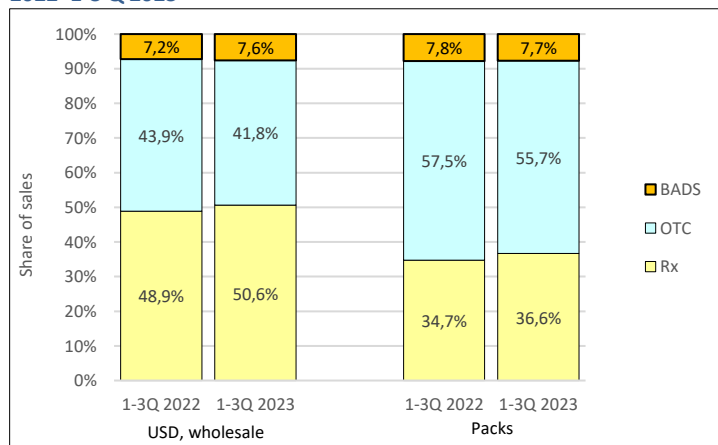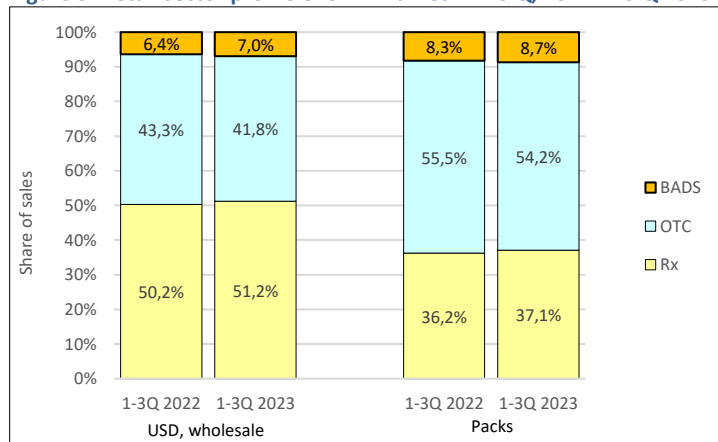

Figure 6. Movement of the Russian/ foreign drugs share in the profile of UrFD pharmaceutical market in 1-3 Q, 2022–1-3 Q 2023

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* Here and elsewhere IQVIA's data are used

# PHARMACEUTICAL MARKET OF THE SIBERIAN FEDERAL DISTRICT (SiFD) IN 1-3 Q 2023 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

| Value		January-September 2023	January-September as % of January-September 2022
Industrial production index			99.5
Retail turnover, RUB bil.		3,097	106.8
Monthly average accrued wage per worker (nominal), RUB		62,325	114.8
	real		109.3

Note: SiFD TOGS data

Figure 1. Movement of the price index and nonfoods price index vs December 2022
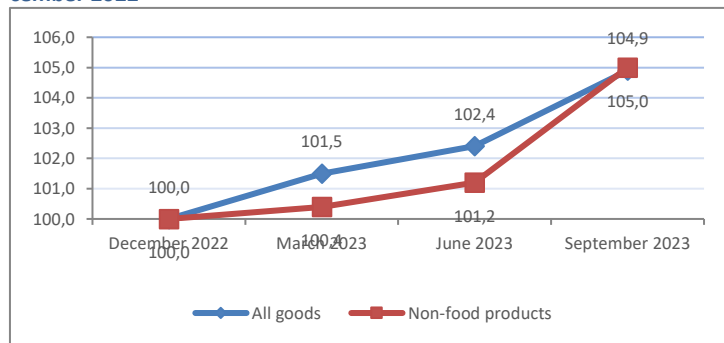
### Indicators of movement of prices and retail margins (according to IQVIA data)

Figure 1. Movement of weighted average prices and retail margins in 1-3 Q 2022–1-3 Q 2023*

### Figure 2. Movement of weighted average purchase prices in 1-3 Q 2022–1-3 Q 2023

Indicators of the market movement and profile (according to IQVIA data)

Figure 3. SiFD pharmaceutical market in 1-3 Q, 2022–1-3 Q 2023

Figure 4. Major sector profile of SiFD pharmaceutical market in 1-3 Q, 2022–1-3 Q 2023

Figure 5. Retail sector profile of SiFD market in 1-3 Q, 2022–1-3 Q 2023

Figure 6. Movement of the Russian/foreign drugs share in the profile of SiFD pharmaceutical market in 1-3 Q, 2022–1-3 Q 2023

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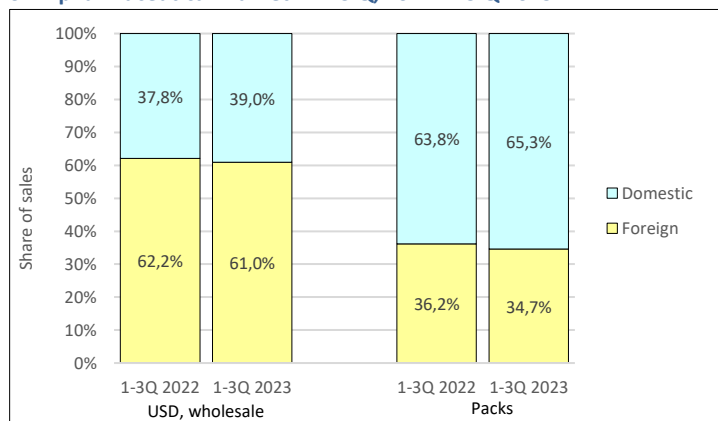
* Here and elsewhere IQVIA's data are used

PHARMACEUTICAL MARKET OF THE SOUTHERN FEDERAL DISTRICT (SoFD) IN 1-3 Q 2023 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	January-September 2023	January-September as % of January-September 2022
Industrial production index		104.3
Retail turnover, RUB bil.	3,903.2	106.9
Monthly average accrued wage per worker (nominal), RUB	50,082	114.6
real		108.4

Note: SoFD TOGS data

Figure 1. Movement of price index and non-foods price index vs December 2022
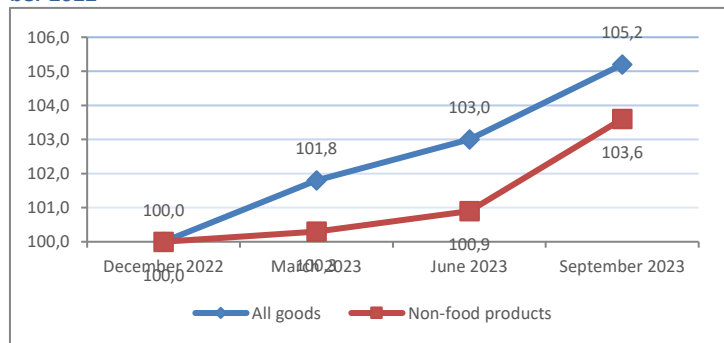
Indicators of movement of prices and retail margins (according to IQVIA data)

Figure 1. Movement of weighted average prices and retail margins in 1-3 Q 2022–1-3 Q 2023*
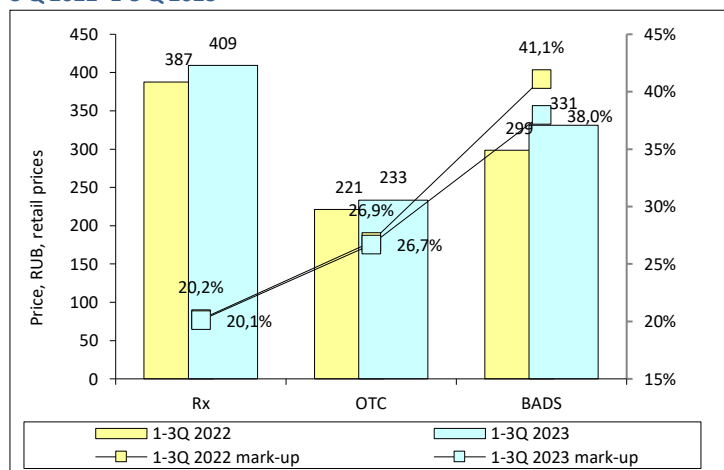
Figure 2. Movement of weighted average purchase prices in 1-3 Q 2022–1-3 Q 2023
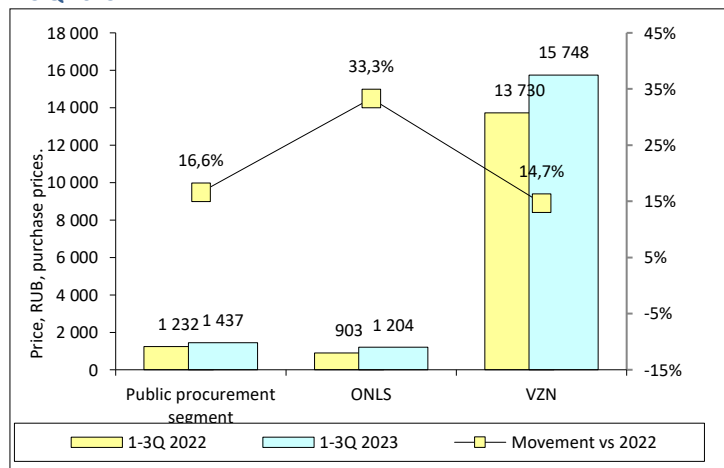
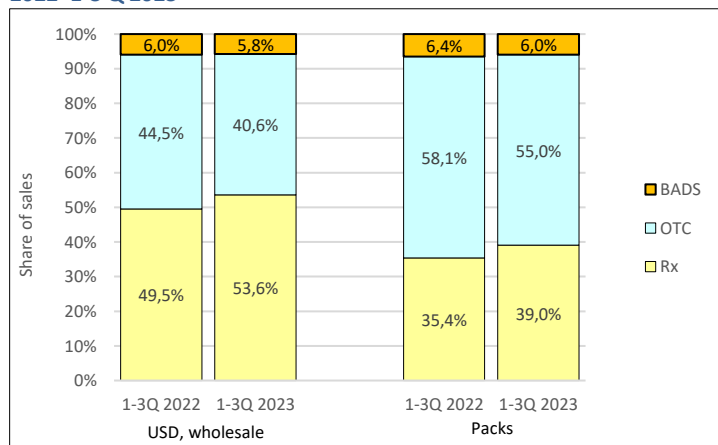## Indicators of the market movement and profile (according to IQVIA data)

Figure 3. SoFD pharmaceutical market in 1-3 Q, 2022–1-3 Q 2023
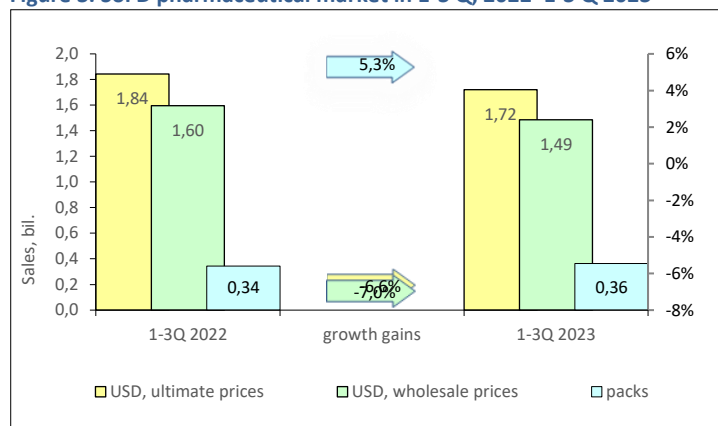
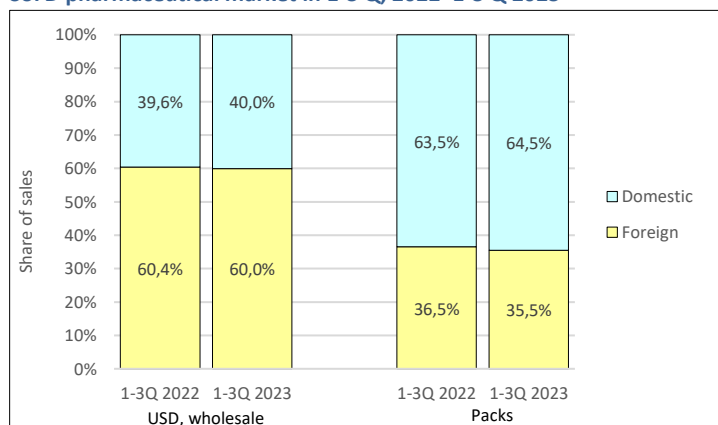### Figure 4. Major sector profile of SoFD pharmaceutical market in 1-3 Q, 2022–1-3 Q 2023
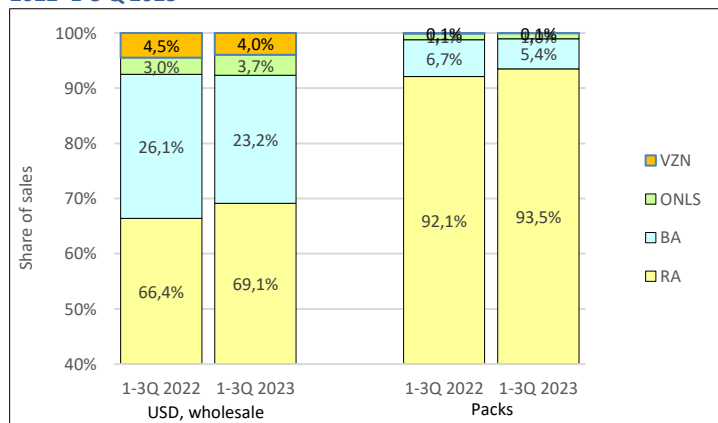
Figure 5. Retail sector profile of SoFD pharmaceutical market in 1-3 Q, 2022–1-3 Q 2023

Figure 6. Movement of the Russian/foreign drugs share in the profile of SoFD pharmaceutical market in 1-3 Q, 2022–1-3 Q 2023

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* Here and elsewhere IQVIA's data are used

# PHARMACEUTICAL MARKET OF THE FAR EASTERN FEDERAL DISTRICT (FEFD) IN 1-3 Q 2023 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	January-September 2023	January-September as % of January-September 2022
Industrial production index		104.9
Retail turnover, RUB bil.	1,904.1	102.9
Monthly average accrued wage per worker (nominal), RUB	79,819	111.8
real		105.5

Note: FEFD TOGS data

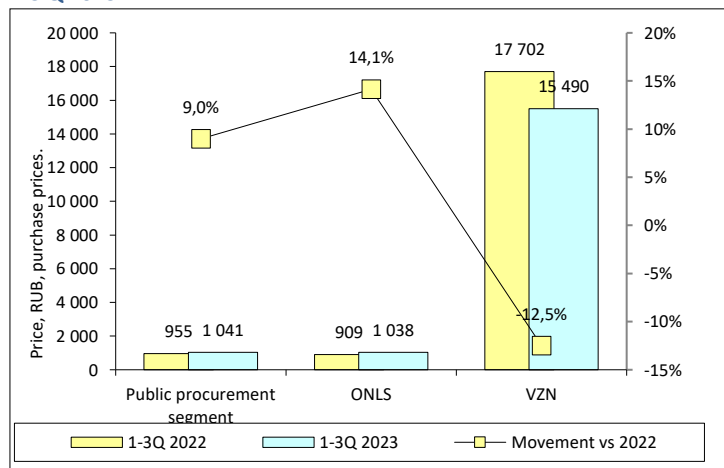### Figure 1. Movement of price index and non-foods price index vs December 2022
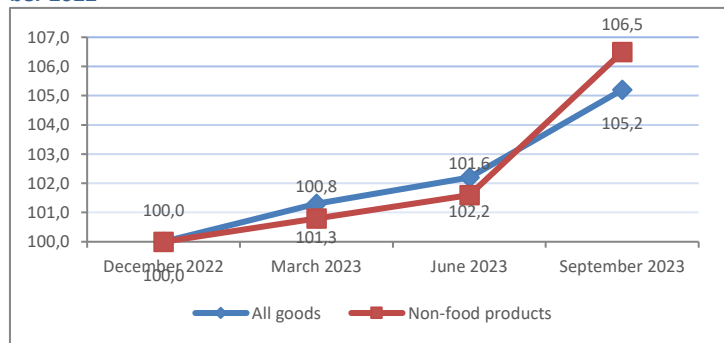
Indicators of movement of prices and retail margins (according to IQVIA data)

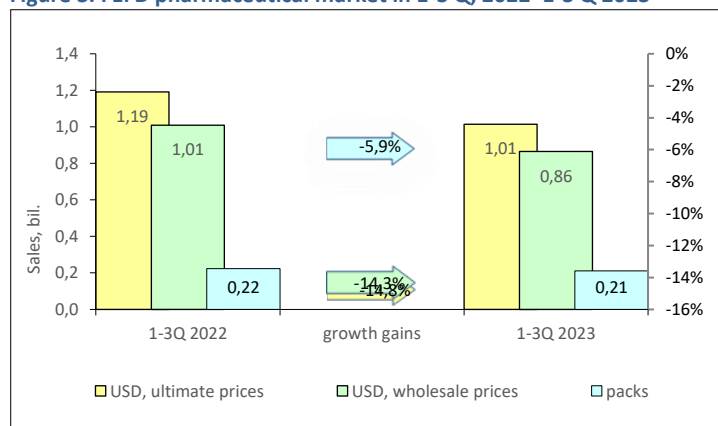### Figure 1. Movement of weighted average prices and retail margins in 1-3 Q 2022–1-3 Q 2023*
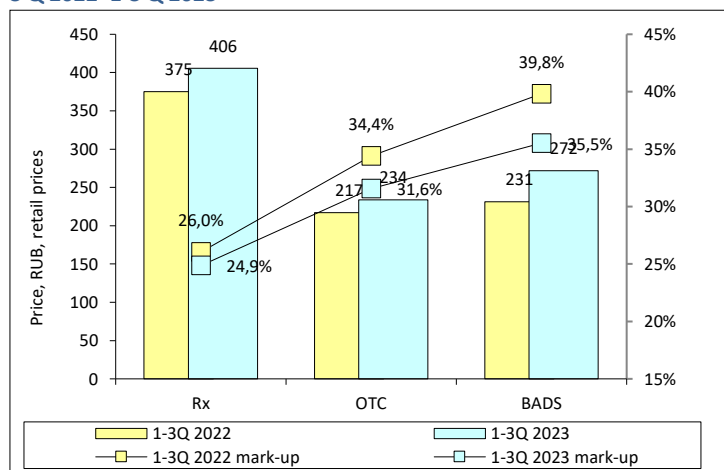
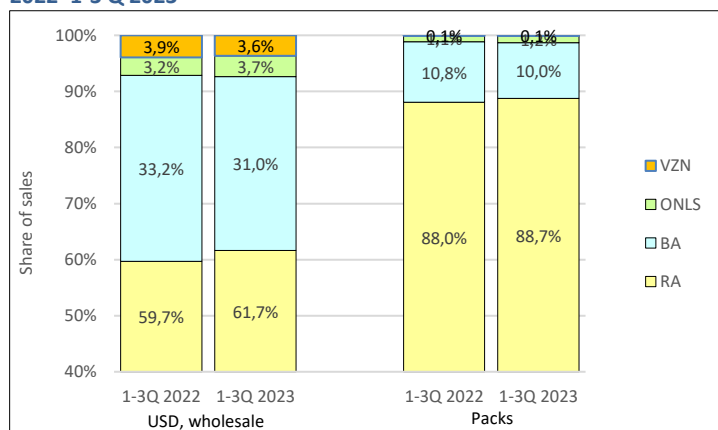### Figure 2. Movement of weighted average purchase prices in 1-3 Q 2022–1-3 Q 2023

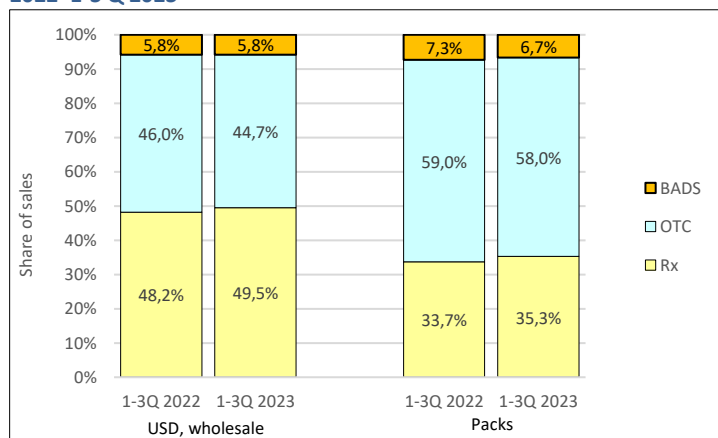## Indicators of the market movement and profile (according to IQVIA data)

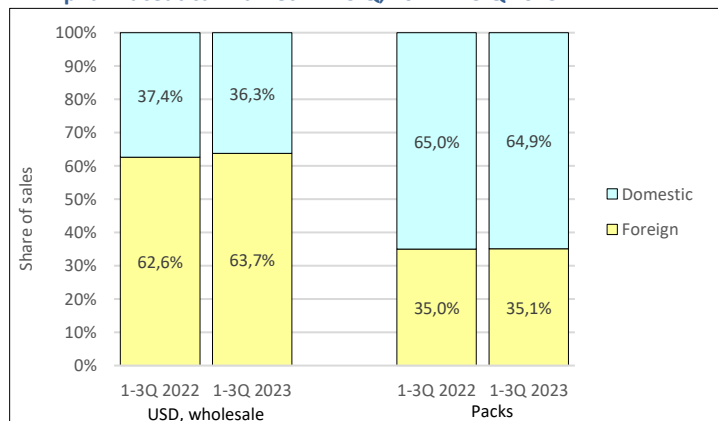### Figure 3. FEFD pharmaceutical market in 1-3 Q, 2022–1-3 Q 2023

Figure 4. Major sector profile of FEFD pharmaceutical market in 1-3 Q, 2022–1-3 Q 2023

Figure 5. Retail sector profile of FEFD pharmaceutical market in 1-3 Q, 2022–1-3 Q 2023

Figure 6. Movement of the Russian/foreign drugs share in the profile of FEFD pharmaceutical market in 1-3 Q, 2022–1-3 Q 2023

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* Here and elsewhere IQVIA's data are used