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, the Consumer Price Index was estimated as 100.2% in July of 2019 as compared to June, 102.7% against December of 2018. In July of 2019, Industrial Producer Price Index (for goods intended for sale on the domestic market) was 97.3%, whereas in the month-earlier period it had amounted to 99.4%. The index accounted for 98.0% against December of 2018.

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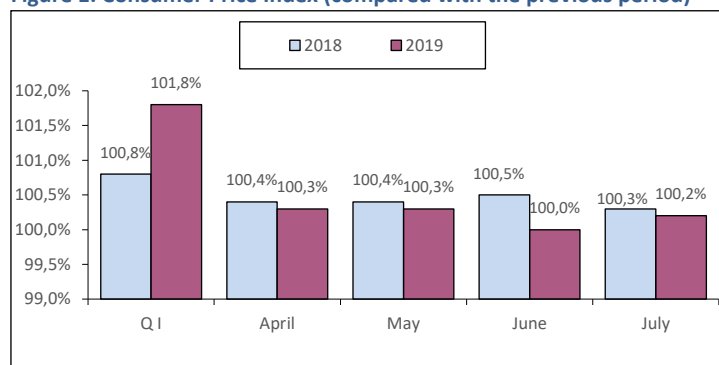
Living standard

According to Federal State Statistics Service's data, in July of 2019 a gross monthly average wage of corporate employees was RUB 45900 (USD 726.27). It accounted for 108.2% compared to the same period in the previous year, and 93% compared to the previous period. In July of 2019, the real gross wage accounted for 103.5% as compared to July of 2018, and 92.8% against the prior period. According to estimates[1], in the first half of 2019 real disposable cash incomes decreased by 1.3% compared to the same period of the previous year (Fig. 2).

Retail turnover

In July of 2019, the retail turnover was RUB 2792.9 bil. or 101.0% (at comparable prices) against the level of the same period of the previous year, RUB 18480.5 bil. or 101.6% in January-July of 2019 (Fig. 2).

Figure 2. Real wage and retail turnover in July 2019.
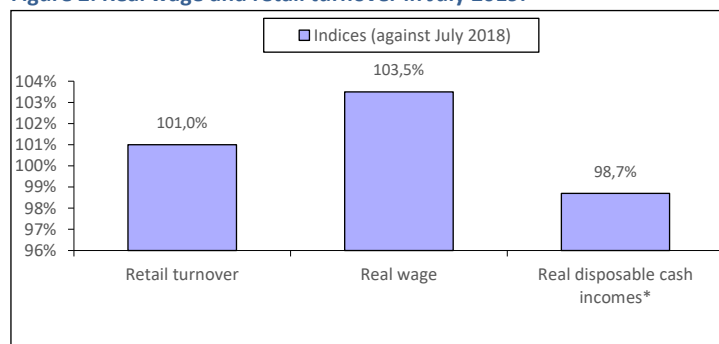
* First half of 2019 vs first half of 2018

Industrial Production

According to Federal State Statistics Service's data, in July 2019 Industrial Production Index accounted for 102.8% compared to the same period in the previous year, and 102.6% in January-July. According to Federal State Statistics Service's data, Industrial Production Index for drugs and medical products accounted for 118.9% in July 2019 compared to the same period of 2018, and 117% in January-July against January-July of 2018.

Domestic production

The top 10 domestic pharmaceutical manufacturers according to their volumes of sales in all segments of the market based on the results for July of 2019 is shown in Table 1.

Table 1. The top ten Russian chemical and pharmaceutical manufacturers by sales volume in July 2019

Rank	Manufacturer	RUB mil.
1	Biocad	2455.22
2	Microgen	1860.67
3	Generium	1676.71
4	Otcpharm	1666.69
5	Pharmasyntez	1366.14
6	Pharmstandart	1121.20
7	Stada	933.66
8	Veropharm	930.59
9	Akrikhin Pharma	831.49
10	Sotex	751.36

Source - Remedium according to IQVIA data

Table 2 provides pharmacy sales data from 10 regions of the Russian Federation. In June of 2019, the sales (in terms of roubles) continued to reduce in virtually all regions compared to the previous month. The most significant reduction was observed in Tatarstan (-9%), the less significant - in Perm (-0.3%). In Krasnodar Krai and Krasnoyarsk Krai, the sales increased by 5% and 6% respectively.

Table 2. Pharmacy sales in the regions, 2019

Region	Pharmacy sales, USD mil. (wholesale prices)			Growth gain, % (roubles)		
	April 2019	May 2019	June 2019	April/ March 19	May/ April 19	June/ May 19
Moscow	180.9	155.5	146.7	0.2%	-14%	-7%
St. Petersburg	65.1	57.7	56.3	-13%	-11%	-3%
Krasnodar Krai	33.4	29.8	31.4	-4%	-11%	5%
Krasnoyarsk Krai	29.7	26.3	28.0	-7%	-11%	6%
Tatarstan	19.9	16.6	15.3	-6%	-16%	-9%
Rostov Region	22.7	19.6	18.7	-2%	-13%	-6%
Novosibirsk Region	22.1	20.3	18.7	-6%	-8%	-8%
Voronezh Region	12.8	11.4	10.9	-11%	-10%	-6%
Perm	6.9	7.5	7.6	-13%	9%	-0.3%
Tyumen	6.8	6.4	6.0	-4%	-7%	-6%

Advertising

The largest advertisers and pharmaceutical brand names highly publicized in mass media (TV, radio, press, outdoor advertising) are shown in Tables 3 & 4.

Table 3. Top five advertisers in mass media in July 2019

Rank	Company*	Quantity of broadcasts
1	Otcpharm	12,798
2	Sandoz	11,359
3	Berlin-Chemie/Menarini	8,046
4	Sanofi	6,925
5	Johnson & Johnson	4,680

Source - Remedium according to Mediascope's data

Table 4. The top five brands in mass media in July 2019

Rank	Brand*	Quantity of broadcasts
1	Exoderil	5,907
2	Lioton 1000	2,823
3	Pentalgin	2,756
4	Zodac	2,568
5	Linex	2,530

Source - Remedium according to Mediascope's data

* Only products registered with the State Drug Registry 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 will be published once a quarter.

RUSSIAN PHARMACY FPP DRUG MARKET: 2019 FIRST SIX MONTHS RESULTS

According to the results of the Retail Audit of Finished Pharmaceutical Products (FPP) in Russian Federation™, in the first six months of 2019 the sales of drugs in physical terms in the country saw a 3% decrease to 2.152 bil. packs, compared to the same period in 2018. In money terms, the market saw a 5% increase in terms of roubles and a 5% decrease in terms of dollars. The volume of the market achieved RUB 386.579 bil. (USD 5.917 bil.) at wholesale prices (Fig. 1). The average cost of a pack decreased as compared to a year earlier (USD 3.42) and reached USD 3.36 at retail prices. Consumer spending for drugs in Russia averaged to USD 58.67 in January-June of 2019, whereas during the same period a year ago it averaged to USD 59.07.

Figure 1. Russian pharmacy market for 3 months of 2018 – 3 months 2019
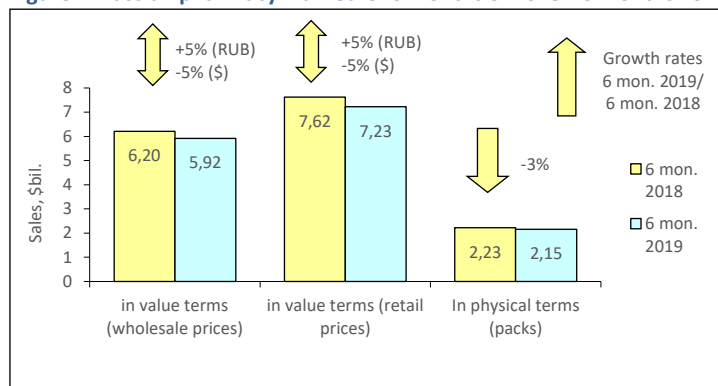
Based on the results for the first half of 2019, the leaders of the top ten drug manufacturers ranking in the Russian pharmacy market held their own (Table 1). The manufacturers BAYER and SANOFI (+1%[2] each), and TEVA (-2%) and SERVIER (+5%) continued to take a lead in the top ten manufacturers ranking, despite the reduction in the market share. ABBOTT (+8%) also held its previous rank seven. Two manufacturers from the top ten rose in the ranks. SANDOZ (+0.4%) moved up one rank, coming in at number five, and the only newcomer KRKA (+26%) moved up to rank six. At the same time, the manufacturers OTCPHARM (-6%), BERLIN-CHEMIE/MENARINI (+5%) and GLAXOSMITHKLINE (+8%) moved down to the bottom three ranks. In total, the top ten manufacturers accumulated 33.5% of the Russian market, whereas in the year-earlier period they accounted for 34%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
6 mon. 2019	6 mon. 2018		6 mon. 2019	6 mon. 2018
1	1	**BAYER**	4.9	5.1
2	2	**SANOFI**	4.3	4.5
3	3	**TEVA**	3.6	3.9
4	4	**SERVIER**	3.5	3.6
5	6	**SANDOZ**	2.9	3.1
6	12	**KRKA**	2.9	2.5
7	7	**ABBOTT**	2.9	2.8
8	5	OTCPHARM	2.9	3.2
9	8	**BERLIN-CHEMIE/MENARINI**	2.8	2.8
10	9	**GLAXOSMITHKLINE**	2.7	2.6
Total			33.5	34.0

*AIPM members are in bold

The top ten brands rating also held their own: XARELTO (+34%), DETRALEX (+4%), NUROFEN (+7%) and CONCOR (+2%) kept their previous top four ranks (Table 2). Another two brands held their own in the ranking, ACTOVEGIN (-3%) and CARDIOMAGNYL (-2%), which kept their previous ranks six and eight despite the negative growth rates. INGAVIRIN (-16%) showed more significant reduction in sales and moved down from rank five to ten. In contrast, the brands MEXIDOL (+3%), KAGOCEL (+4%) and MIRAMISTIN (+7%) moved up to the higher ranks, coming in at numbers five, seven and nine, respectively. On top of that, the latter became the only newcomer of the top 10 ranking. The total share did not practically change and amounted to 6.6%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
6 mon. 2019	6 mon. 2018		6 mon. 2019	6 mon. 2018
1	1	XARELTO	1.0	0.8
2	2	DETRALEX	0.7	0.8
3	3	NUROFEN	0.7	0.7
4	4	CONCOR	0.7	0.7
5	7	MEXIDOL	0.6	0.6
6	6	ACTOVEGIN	0.6	0.7
7	9	KAGOCEL	0.6	0.6
8	8	CARDIOMAGNYL	0.5	0.6
9	12	MIRAMISTIN	0.5	0.5
10	5	INGAVIRIN	0.5	0.7
Total			6.5	6.6

One newcomer broke into the top 10 INN and group names ranking as well: DICLOFENAC (+18%) moved up to rank nine from 11(Table 3). In addition, the composition DIOSMIN*HESPERIDIN (+5%) and INN RIVAROXABAN (+34%) also moved up to the higher ranks. In contrast, four brands fell in the ranks. IBUPROFEN (+4%) and ETHYLMETHYLHYDROXYPYRIDINE (-3%) moved down one rank, and the brand BISOPROLOL (+9%) and ROSUVASTATIN (-3%) lost two ranks each. The brand XYLOMETAZOLINE held its previous rank number one, despite a 2% reduction in sales. INNs PANCREATIN (+10%) and NIMESULIDE (+5%) held their previous ranks five and seven. The total share of the top 10 increased from 9.7% to 9.9%.

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

Rank		INNs/Grouping Names	Share in total pharmacy sales, %	
6 mon. 2019	6 mon. 2018		6 mon. 2019	6 mon. 2018
1	1	XYLOMETAZOLINE	1.5	1.6
2	3	DIOSMIN*HESPERIDIN	1.1	1.1
3	2	IBUPROFEN	1.1	1.1
4	8	RIVAROXABAN	1.0	0.8
5	5	PANCREATIN	1.0	1.0
6	4	BISOPROLOL	1.0	1.0
7	7	NIMESULIDE	0.9	0.9
8	6	ROSUVASTATIN	0.8	0.9
9	11	DICLOFENAC	0.7	0.7
10	9	ETHYLMETHYLHYDROXYPYRIDINE	0.7	0.7
Total			9.9	9.7

In contrast to the previous top 10s, the top ten ATC - groups ranking changed its leader. C09 Agents acting on the renin-angiotensin system (+18%), which showed the highest growth rates, moved up to rank one from two (Table 4). At the same time, the former leader of the top 10 M01 Anti-inflammatory and antirheumatic products (+6%) moved down one rank. G03 Sex hormones (+6%), which showed the same growth rates, continued to hold its previous rank three. Apart from the leader, the market of the group B1 Antithrombotic agents (+12%) developed at a fast pace, which allow it to move from rank six to four. C05 Vasoprotectors (+4%) placed at rank nine moved up one rank. At the same time, R01 Nasal preparations (+1%) and J01 Antibacterials for systemic use (+0.2%) that showed low growth rates, and R05 Cough and cold preparations (-3%) moved down to the lower ranks five, six and ten. The groups J05 Antivirals for systemic use and N02 Analgesics (-4% each) held their previous ranks seven and eight. In total, the top ten ATC groups accumulated 36%, whereas in the year-earlier period they accounted for 36.3%.

**Table 4. The top ten ATC Groups by pharmacy sales**

Rank		ATC code	ATC group	Share in total pharmacy sales, %	
6 mon. 2019	6 mon. 2018			6 mon. 2019	6 mon. 2018
1	2	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.1	4.6
2	1	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	4.9	4.8
3	3	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.7	3.7
4	6	B01	ANTITHROMBOTIC AGENTS	3.7	3.5
5	4	R01	NASAL PREPARATIONS	3.6	3.7
6	5	J01	ANTIBACTERIALS FOR SYST USE	3.4	3.6
7	7	J05	ANTIVIRALS FOR SYSTEMIC USE	3.0	3.3
8	8	N02	ANALGESICS	2.9	3.2
9	10	C05	VASOPROTECTIVES	2.9	3.0
10	9	R05	COUGH AND COLD PREPARATIONS	2.8	3.1
Total				36.0	36.3

Conclusion. Based on the results for the first half of 2019, the pharmacy retail market of the country brought in RUB 472.146 bil. (USD 7.228 bil.), which is 5% in terms of roubles and 5% in terms of dollars less than in 2018. In pack terms, the market reduced by 3% compared to the previous year and amounted to 2.152 bil. packs. Based on the results for the first six months of 2019, the average cost of an FPP pack in the national pharmacies was USD 3.36, whereas in the year-earlier period it was USD 3.42. The average expenses of the Russian Federation residents for purchase of OTC drugs in pharmacies reduced as compared to the previous year (USD 58.67 vs. USD 59.07).

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

RUSSIAN FEDERATION HOSPITAL MARKET: 2019 FIRST SIX MONTHS RESULTS

According to the results of the Budget Audit of FPPs in the Russian Federation (without DLO and regional benefit)™, the national hospital market increased by 3% in physical terms and amounted to 252.130 mil. packs based on the results for January- June 2019. In value terms, the market showed a 41% increase in terms of roubles and 31% in terms of dollars and reached RUB 89.910 bil. (USD 1.384 bil.) at wholesale prices. Based on the results for the first half of 2019, the average cost of an FPP pack in the hospital sector of the country was USD 5.49, whereas in the year-earlier period its cost was USD 4.32.

Figure 1. Russian hospital market for 6 months of 2018 – 6 months 2019
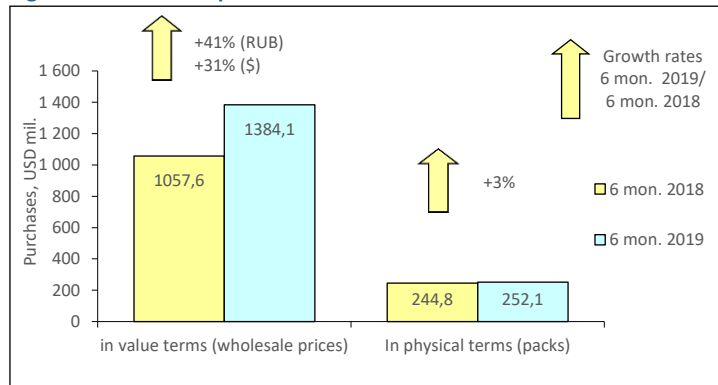
In the first half of 2019, most drug manufacturers from the top ten ranking, as the overall regional market, showed high growth rates (Table 1). The markets of the companies BIOCAD and MSD developed at a fast pace, the purchases of both companies increased by 2.1 times. ROCHE demonstrated the higher growth rates (4.2-fold growth in purchases), which allowed it to rise from rank 13 to four and became the only newcomer of the rating. Due to a two-fold increase in purchases, NOVARTIS moved to a higher rank eight. At the same time, they displaced the manufacturers PFIZER (+40%), ABBVIE (+33%), JOHNSON & JOHNSON (+42%) and BAYER (+64%) to rank three, five, seven and ten. PHARMASYNTEZ (-15%), which dropped from rank one to nine, was the only company that showed negative growth rates. SANOFI (+58%) continued to hold its previous rank six. The total share of the top ten manufacturers increased by over 6 p.p. and accounted for 41%.

Table 1. The top 10 drug manufacturers by hospital purchases

Rank in the top ten		Manufacturer*	Share in total hospital purchases, %	
6 mon. 2019	6 mon. 2018		6 mon. 2019	6 mon. 2018
1	4	BIOCAD RF	6.5	4.3
2	7	**MSD**	5.0	3.4
3	2	**PFIZER**	4.5	4.6
4	13	**ROCHE**	4.3	1.4
5	3	**ABBVIE**	4.2	4.5
6	6	**SANOFI**	3.8	3.4
7	5	**JOHNSON & JOHNSON**	3.7	3.7
8	10	**NOVARTIS**	3.4	2.3
9	1	PHARMASYNTEZ	2.9	4.9
10	9	**BAYER**	2.7	2.3
Total			41.0	34.8

*AIPM members are in bold

None of the top 10 brands ranking managed to keep their earlier ranks, but most of them rose in the ranks (Table 2). PREVENAR 13 (+36%) moved up to rank one from two, and HERTICAD (2.5-fold growth in purchases) moved up to rank two from four. At the same time, they displaced the former leader NATRIUM CHLORIDUM (+6%) down to rank three. The newcomers broke into the ranks of the top ten ranking, coming in at numbers four, and six through eight: AVEGRA (3.2-fold growth), OPDIVO (8.7-fold growth), KEYTRUDA (16-fold growth) and PERJETA (12-fold growth). At the same time, the brands KALETRA (+59%), INTELENCE (+81%) and PENTAXIM (+72%) moved down to rank five and two bottom ranks of the top ten ranking. The total share of the top 10 brands reduced from 11.5% to 17.7%.

Table 2. The top 10 brands by hospital purchases

Rank in the top ten		Brand	Share in total hospital purchases, %	
6 mon. 2019	6 mon. 2018		6 mon. 2019	6 mon. 2018
1	2	PREVENAR 13	2.3	2.4
2	4	HERTICAD	2.2	1.2
3	1	NATRIUM CHLORIDUM	2.0	2.7
4	12	AVEGRA BIOCAD	1.9	0.8
5	3	KALETRA	1.8	1.6
6	36	OPDIVO	1.8	0.3
7	44	KEYTRUDA	1.8	0.2
8	42	PERJETA	1.4	0.2
9	5	INTELENCE	1.3	1.0
10	7	PENTAXIM	1.2	1.0
Total			17.7	11.5

The leaders of the top-10 INN and group names rating also changed (Table 3). At half year-end, VACCINE, PNEUMOCOCCAL (+36%) and TRASTUZUMAB became the leaders, the purchases of the latter increased by 2.7 times. In addition, almost all newcomers of the top-10 demonstrated a manifold increase in purchases. BEVACIZUMAB (3.3-fold growth in purchases), NIVOLUMAB (8.7-fold growth), PEMBROLIZUMAB (16.2-fold growth) and PERTUZUMAB (12.1-fold growth) moved up to ranks four, and six through eight respectively. The less dynamic newcomer of the top ten VACCINE, ACEL.PERT.DIP.TET. POLIO & HIB broke into the ranks of the top ten, coming in at rank ten. Despite the high growth rates, the composition LOPINAVIR*RITONAVIR (+60%) and the brand ETRAVIRINE (+81%) moved down to ranks five and nine, respectively. The last year leader SODIUM (+6%) moved down to rank three. The total share accumulated by the top-ten INNs and grouping names increased from 12% to 18.6%.

Table 3. The top 10 INNs and grouping names by hospital purchases

Rank		INNs/Grouping Names	Share in total hospital purchases, %	
6 mon. 2019	6 mon. 2018		6 mon. 2019	6 mon. 2018
1	2	VACCINE, PNEUMOCOCCAL	2.6	2.7
2	4	TRASTUZUMAB	2.6	1.4
3	1	SODIUM	2.1	2.7
4	16	BEVACIZUMAB	2.0	0.9
5	3	LOPINAVIR*RITONAVIR	1.8	1.6
6	38	NIVOLUMAB	1.8	0.3
7	48	PEMBROLIZUMAB	1.8	0.2
8	46	PERTUZUMAB	1.4	0.2
9	7	ETRAVIRINE	1.3	1.0
10	11	VACCINE, ACEL.PERT.DIP.TET. POLIO & HIB	1.2	1.0
Total			18.6	12.0

The top 10 ATC groups turned out to be the most stable: half of its groups retained their previous positions (Table 4). The leader of the top ten ranking L01 Antineoplastic agents (2.7-fold growth in purchases-) and J05 Antivirals for systemic use (+36%), B05 Blood substitutes and perfusion solutions (+14%), B01 Antithrombotic agents (+17%) and L04 Immunodepressants (+24%) held their previous ranks five, six and eight. Three ATC groups of the top 10 rose in the ranks. J07 Vaccines (+36%) moved up one rank, coming in at number three, the more dynamic group J04 Antimycobacterials (+45%) moved up two ranks, to number seven. The only newcomer of the top 10, L02 Endocrine therapy (3-fold increase in purchases) moved up to the bottom rank of the top ten. The groups J01 Antibacterials for systemic use (+ 13%) and V08 Contrast media (+ 14%) showed relatively low growth rates, lost their rating positions and moved down to ranks four and nine, respectively. In total, the top ten ATC groups accumulated 73.3% of the hospital market, whereas in the year-earlier period - 63.7%.

Table 4. The top ten ATC groups by hospital purchases

Rank		ATC code	ATC group	Share in total hospital purchases, %	
6 mon. 2019	6 mon. 2018			6 mon. 2019	6 mon. 2018
1	1	L01	ANTINEOPLASTIC AGENTS	28.6	14.8
2	2	J05	ANTIVIRALS FOR SYSTEMIC USE	11.1	11.5
3	4	J07	VACCINES	7.8	8.1
4	3	J01	ANTIBACTERIALS FOR SYST USE	6.7	8.4
5	5	B05	PLASMA SUBSTITUTES AND PERFUSION SOLUTIONS	5.2	6.4
6	6	B01	ANTITHROMBOTIC AGENTS	4.1	4.9
7	9	J04	ANTIMYCOBACTERIALS	2.7	2.6
8	8	L04	IMMUNOSUPPRESSANTS	2.5	2.8
9	7	V08	CONTRAST MEDIA	2.4	3.0
10	23	L02	ENDOCRINE THERAPY	2.2	1.0
Total				73.3	63.7

Conclusion. At the end of January-June of 2019, the Russian hospital market showed high positive growth rates both in rouble terms (+41%) and in dollar terms (+31%) and brought in RUB 89.910 bil. (USD 1.384 mil.). In physical terms, the market expanded by 3% and amounted to 252.130 mil. packs. At the end of the first half of 2019, the average cost of a finished pharma product (FPP) pack in the national hospital sector amounted to USD 5.49 vs. USD 4.32 during the same period in 2018.

PHARMACEUTICAL MARKET OF THE CENTRAL FEDERAL DISTRICT (CFD) IN 1-2 QUARTER OF 2019 KEY PERFORMANCE INDICATORS

Macroeconomic indices

Table 1 The latest statistical data on socio-economic situation in Central Federal District

Value	June-January 2019	June-January 2019 (%) as % against June-January 2018
Industrial production index		107.4
Retail turnover, RUB bil.	5,489.7	102.3
Monthly average accrued wage per one worker (nominal), RUB	58,832	108.2
real		102.7

Note: CFD TOGS data

Figure 1. Dynamics of price index and price index for non-food products against December 2018
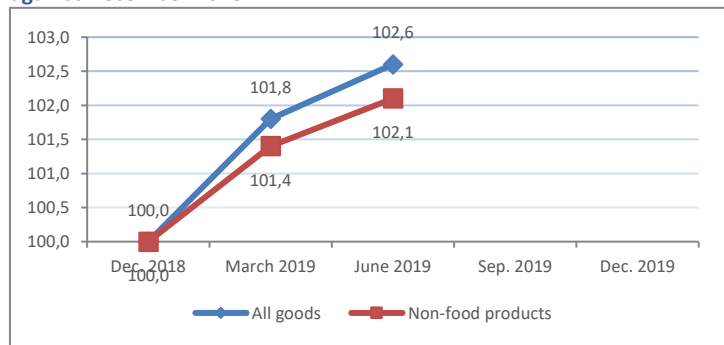
Indicators of price dynamics and retail margins

Figure 1. Dynamics of weighted average prices and retail margins in 1-2 Q 2018 – 1-2 Q 2019
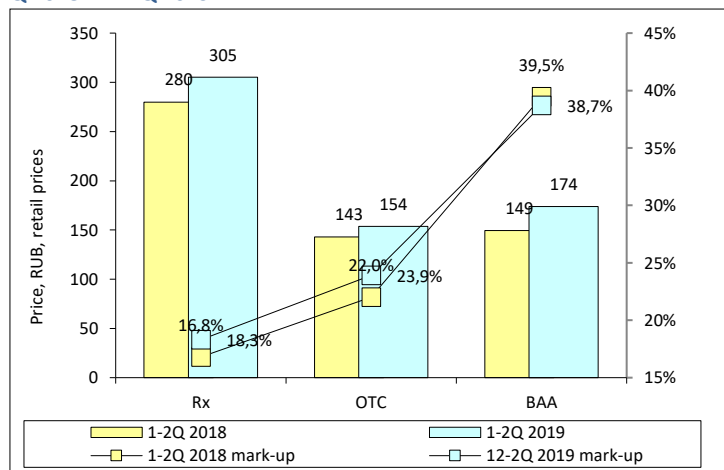
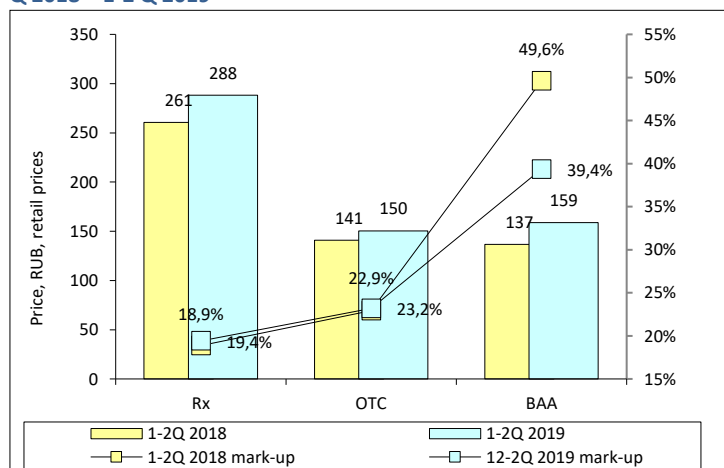**Figure 2. Dynamics of weighted average purchase prices in 1-2 Q, 2018 – 1-2 Q 2019**
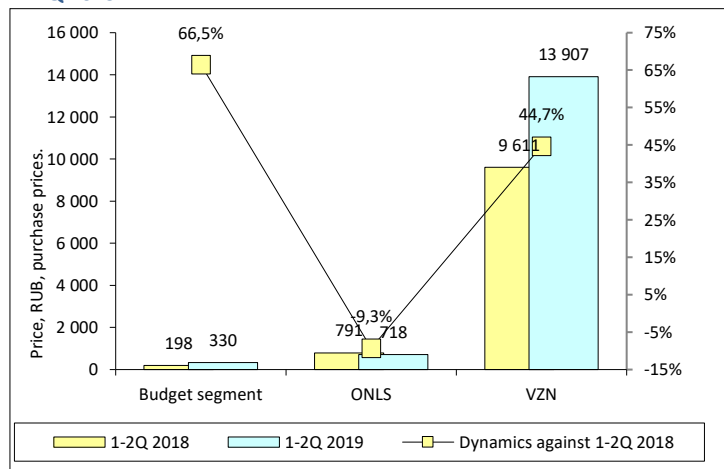
Indicators of the dynamics and structure of the market³

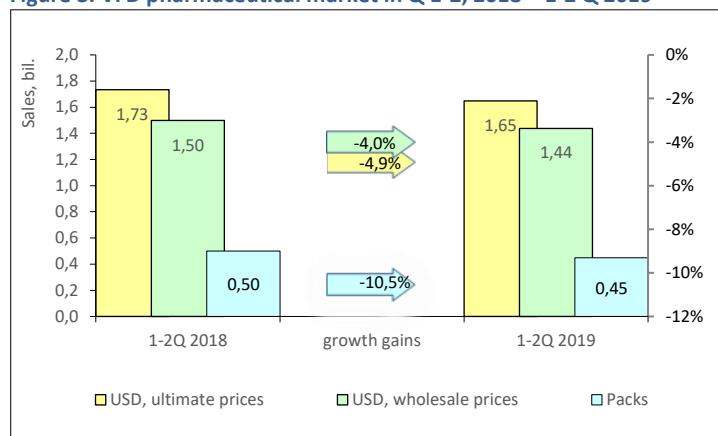**Figure 3. CFD pharmaceutical market in Q 1-2, 2018 – 1-2 Q 2019**
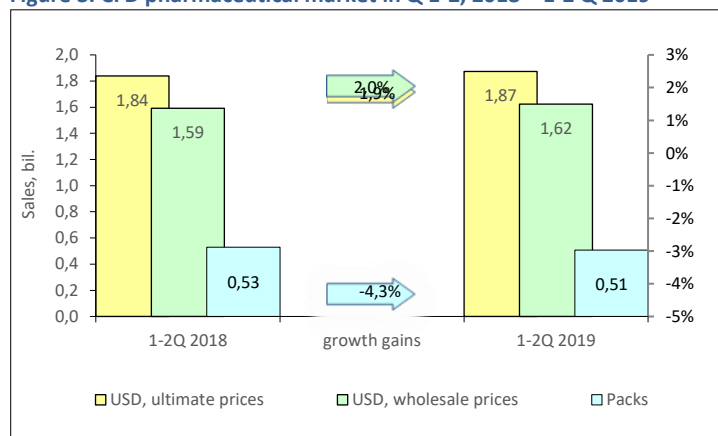
Figure 4. Structure of CFD pharmaceutical market by major segments in Q 1-2, 2018 – 1-2 Q 2019
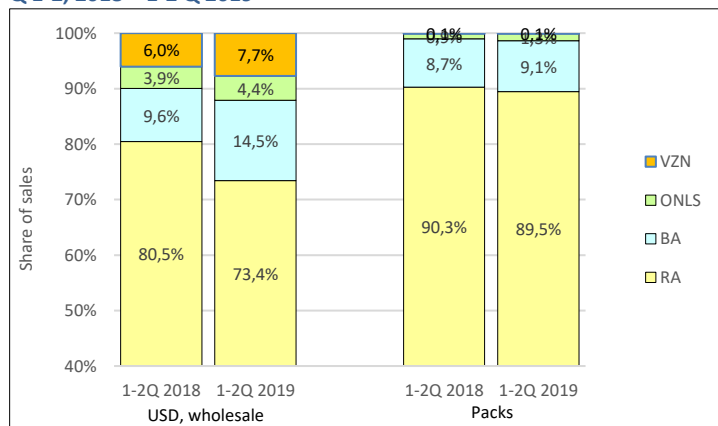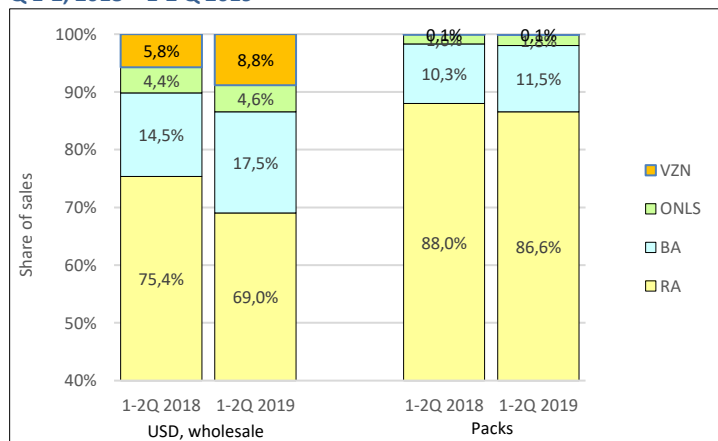

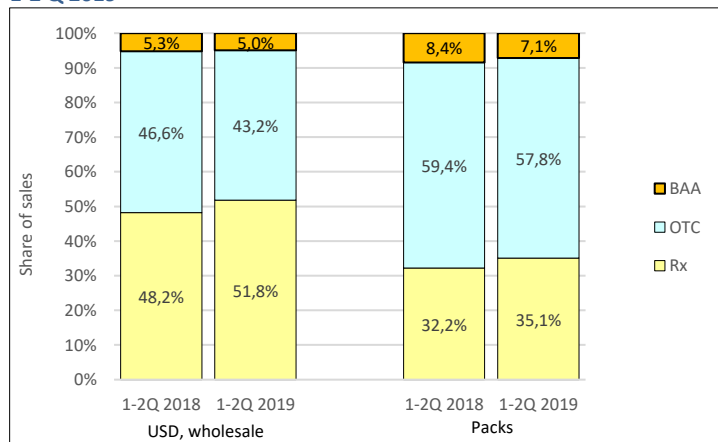**Figure 5. Structure of the retail segment of CFD market in Q 1-2, 2018 – 1-2 Q 2019**
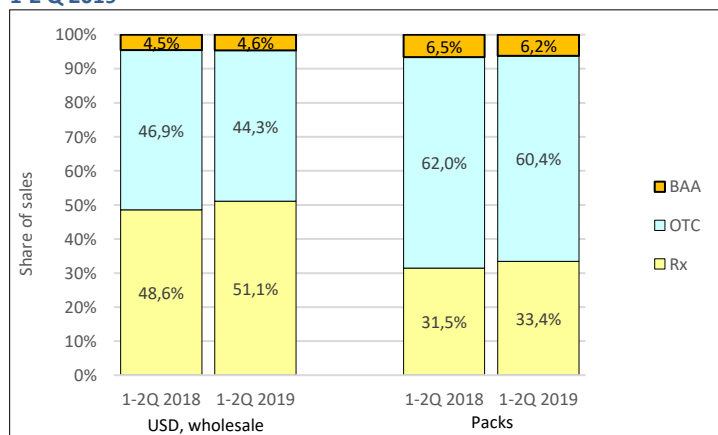
Figure 6. Dynamics of the Russian/ foreign drugs share in the structure of CFD pharmaceutical market in Q 1-2, 2018 – 1-2 Q 2019
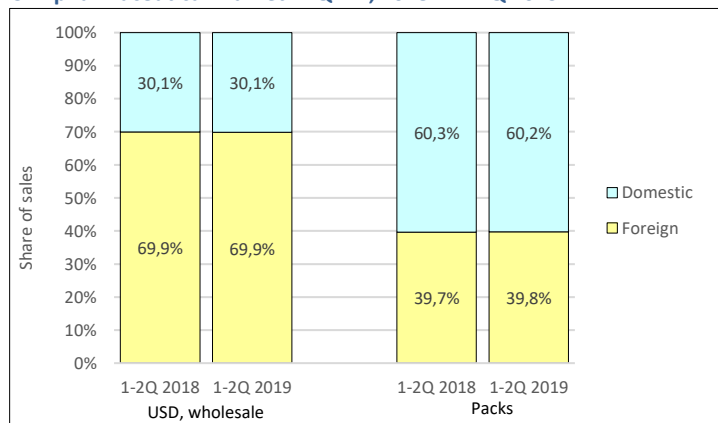

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³ Exclusive of Moscow

PHARMACEUTICAL MARKET OF THE NORTH-WESTERN FEDERAL DISTRICT (NWFD) IN 1-2 Q, 2019 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	June-January 2019	June-January 2019 (%) as % against June-January 2018
Industrial production index		101.8
Retail turnover, RUB bil.	1568.7	101.5
Monthly average accrued wage per one worker (nominal), RUB	51,438	104.8
real		99.9

Note: NWFD TOGS data

Figure 1. Dynamics of price index and price index for non-food products against December 2018
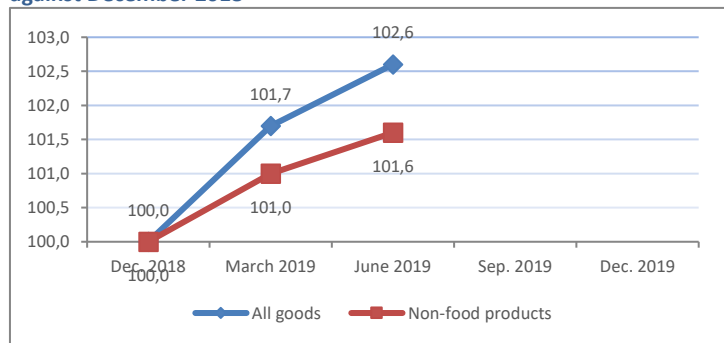
Indicators of price dynamics and retail margins

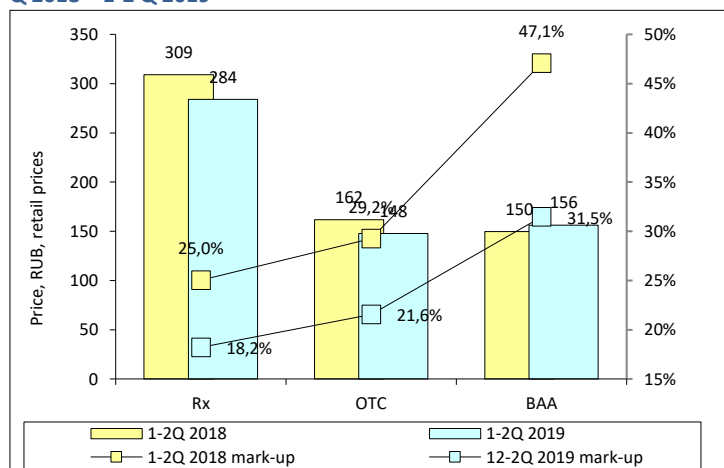### Figure 1. Dynamics of weighted average prices and retail margins in 1-2 Q 2018 – 1-2 Q 2019
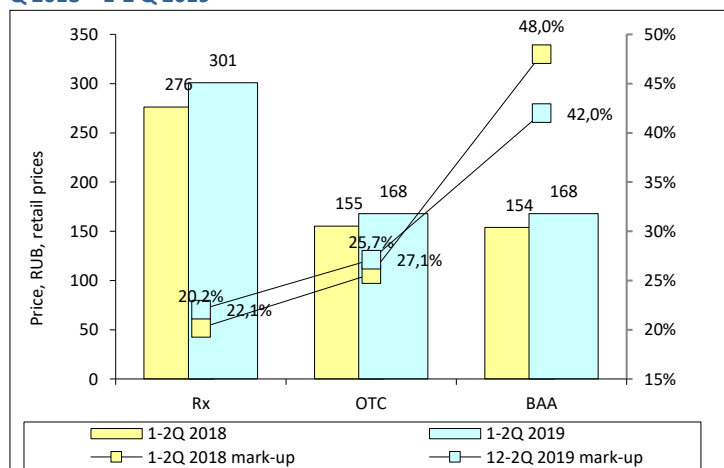
Figure 2. Dynamics of weighted average purchase prices in 1-2 Q, 2018 – 1-2 Q 2019
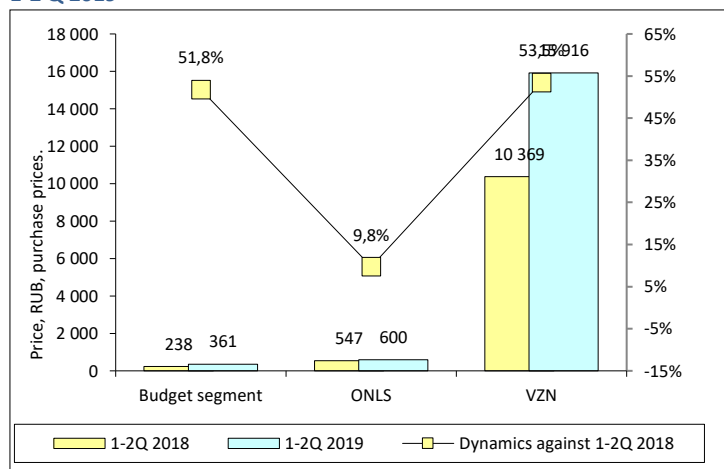
Indicators of the dynamics and structure of the market[4]

Figure 3. NWFD pharmaceutical market in Q 1-2, 2018 – 1-2 Q 2019
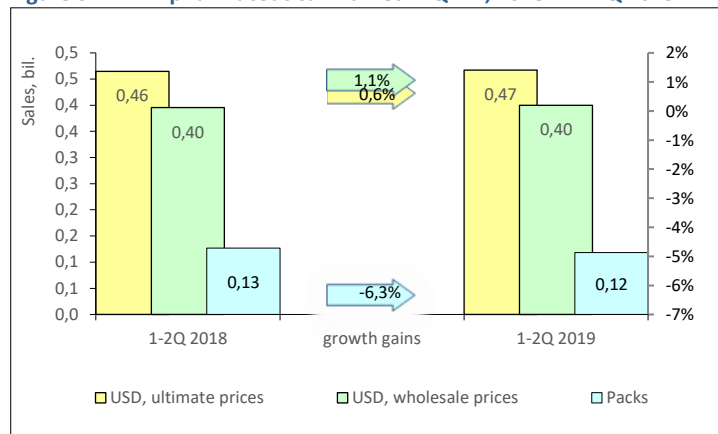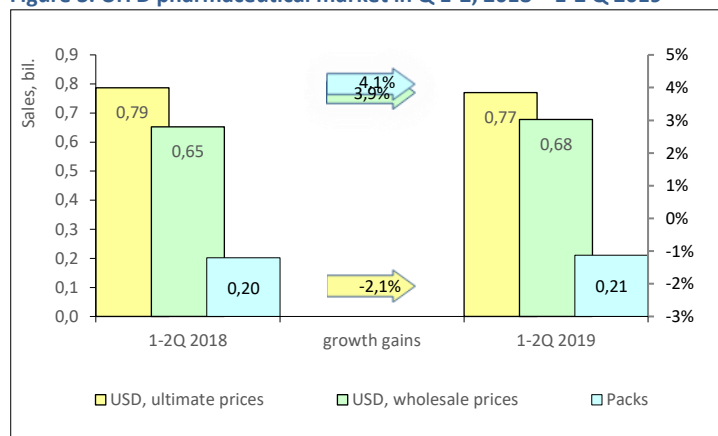

Figure 4. Structure of NWFD pharmaceutical market by major segments in Q 1-2, 2018 – 1-2 Q 2019
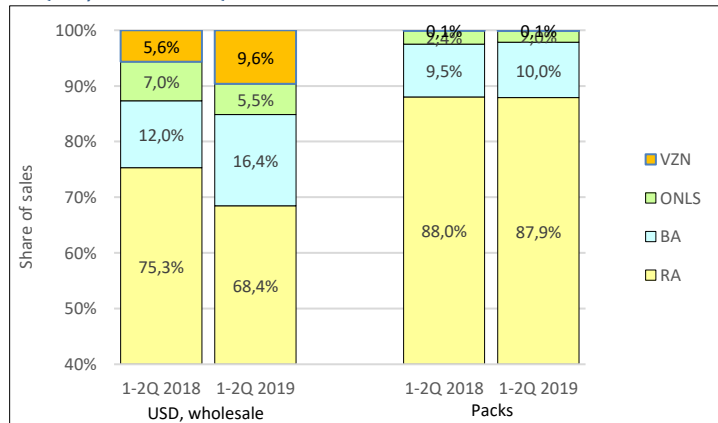
Figure 5. Structure of the retail segment of NWFD market in Q 1-2, 2018 – 1-2 Q 2019
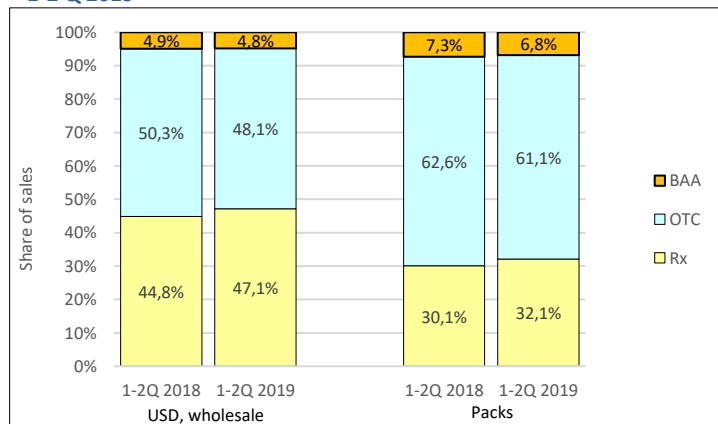
Figure 6. Dynamics of the Russian/ foreign drugs share in the structure of NWFD pharmaceutical market in Q 1-2, 2018 – 1-2 Q 2019

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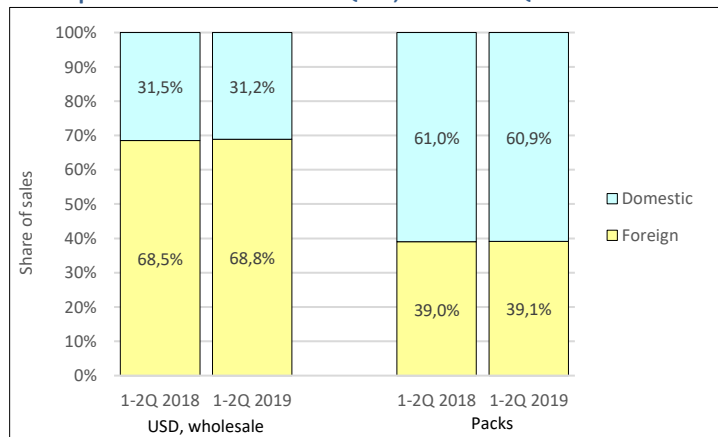
[4] Exclusive of St. Petersburg

PHARMACEUTICAL MARKET OF THE VOLGA FEDERAL DISTRICT (VFD) IN Q 1-2 OF 2019 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	June-January 2019	June-January 2019 (%) as % against June-January 2018
Industrial production index		102.9
Retail turnover, RUB bil.	2,733.8	101.8
Monthly average accrued wage per one worker (nominal), RUB	33,272	106.4
real		101.4

Note: VFD TOGS data

Figure 1. Dynamics of price index and price index for non-food products against December 2018
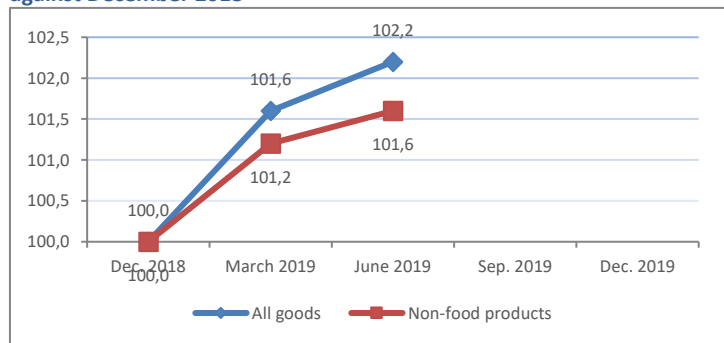
Indicators of price dynamics and retail margins

Figure 1. Dynamics of weighted average prices and retail margins in 1-2 Q 2018 – 1-2 Q 2019

Figure 2. Dynamics of weighted average purchase prices in 1-2 Q, 2018 – 1-2 Q 2019
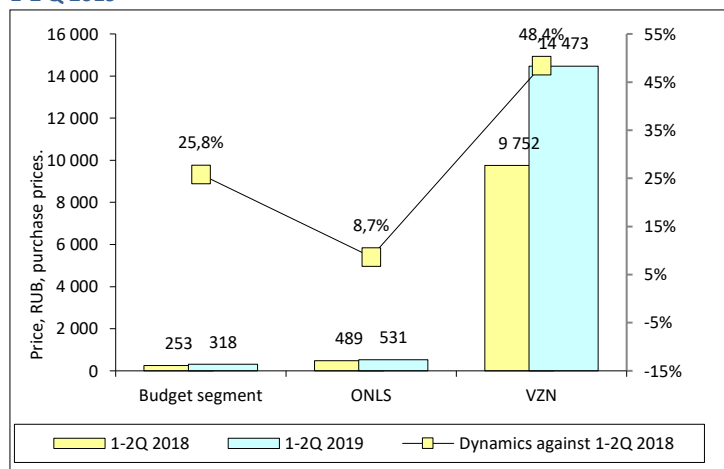
Indicators of the dynamics and structure of the market

Figure 3. VFD pharmaceutical market in Q 1-2, 2018 – 1-2 Q 2019

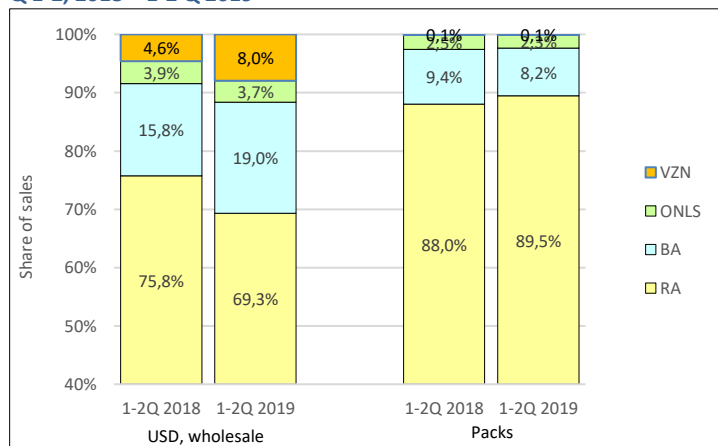### Figure 4. Structure of PFD pharmaceutical market by major segments in Q 1-2, 2018 – 1-2 Q 2019

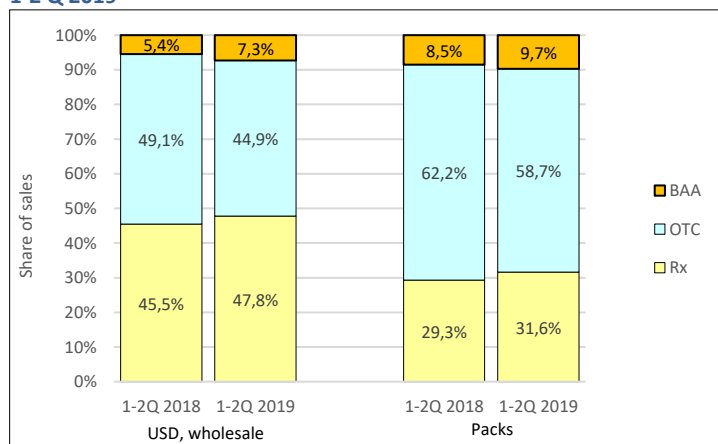### Figure 5. Structure of the retail segment of VFD market in Q 1-2, 2018 – 1-2 Q 2019

Figure 6. Dynamics of the Russian/foreign drugs share in the structure of VFD pharmaceutical market in Q 1-2, 2018 – 1-2 Q 2019

PHARMACEUTICAL MARKET OF THE URAL FEDERAL DISTRICT (UFD) IN 1-2 Q, 2019 KEY PERFORMANCE INDICATORS
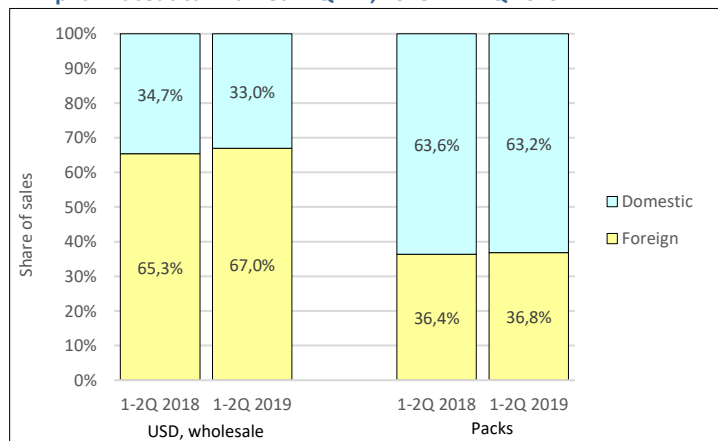
Macroeconomic indices

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

Value	June-January 2019	June-January 2019 (%) as % against June-January 2018
Industrial production index		104.4
Retail turnover, RUB bil.	1356.5	101.7
Monthly average accrued wage per one worker (nominal), RUB	47,134	103.7
real		99.7

Note: VFD TOGS data

Figure 1. Dynamics of price index and price index for non-food products against December 2018
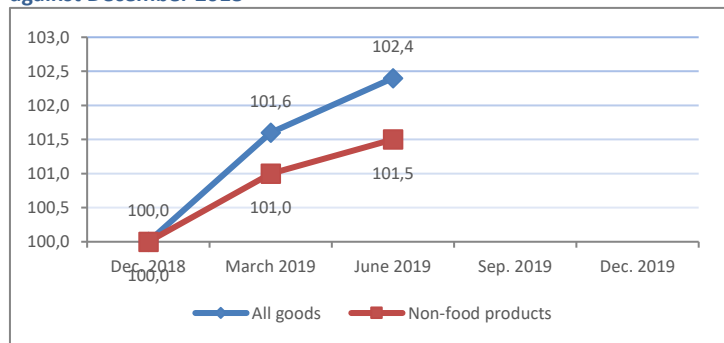
Indicators of price dynamics and retail margins

Figure 1. Dynamics of weighted average prices and retail margins in 1-2 Q 2018 – 1-2 Q 2019
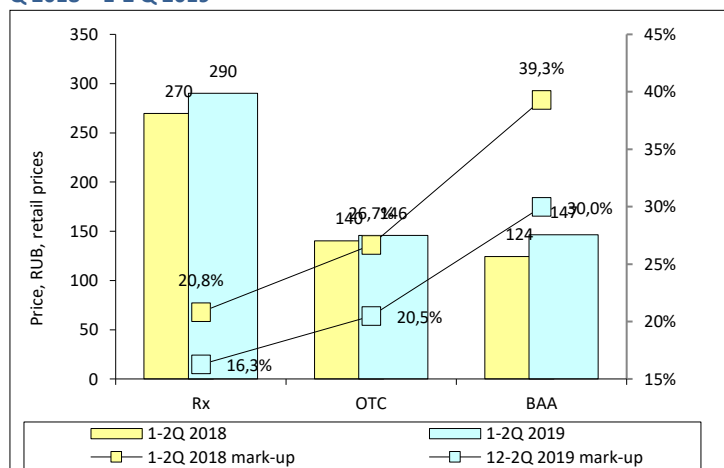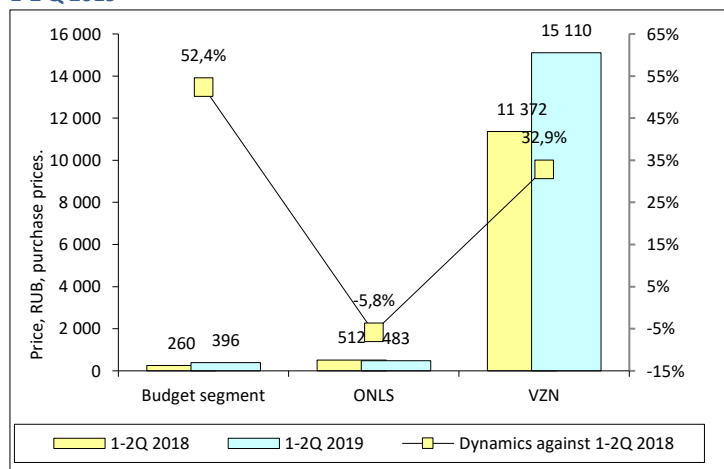

Figure 2. Dynamics of weighted average purchase prices in 1-2 Q, 2018 – 1-2 Q 2019
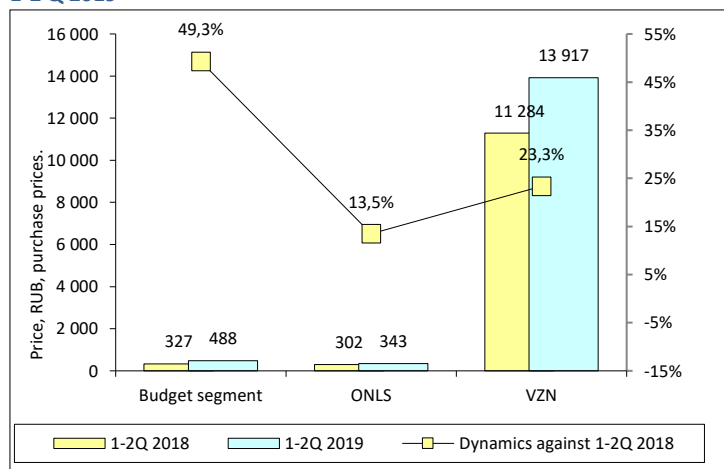
Indicators of the dynamics and structure of the market

Figure 3. UrFD pharmaceutical market in Q 1-2, 2018 – 1-2 Q 2019
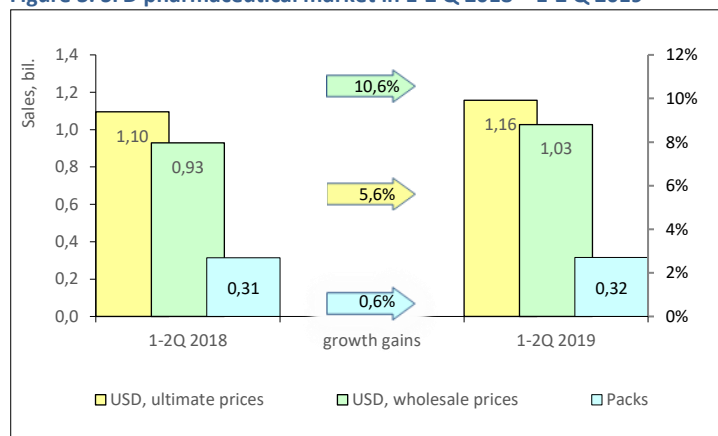

Figure 4. Structure of UrFD pharmaceutical market by major segments in Q 1-2, 2018 – 1-2 Q 2019
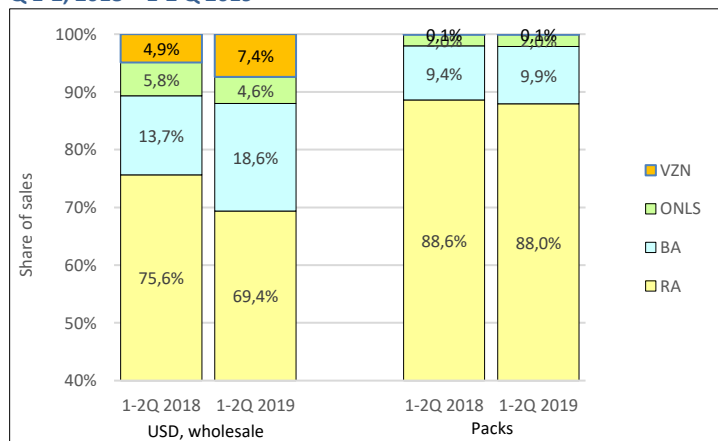

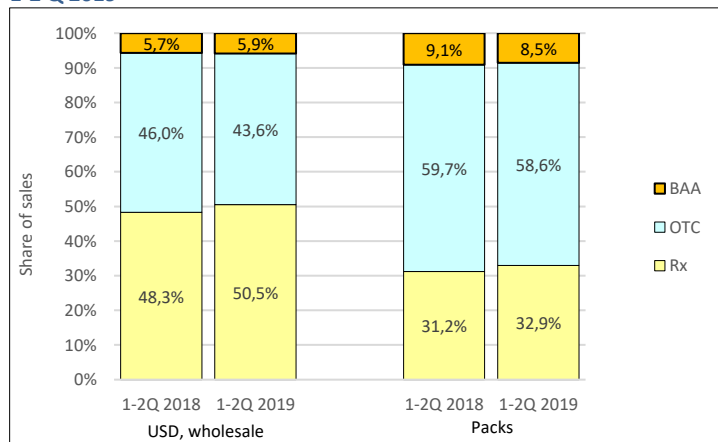**Figure 5. Structure of the retail segment of UrFD market in Q 1-2, 2018 – 1-2 Q 2019**

Figure 6. Dynamics of the Russian/ foreign drugs share in the structure of UrFD pharmaceutical market in Q 1-2, 2018 – 1-2 Q 2019

PHARMACEUTICAL MARKET OF THE SIBERIA FEDERAL DISTRICT (SFD) IN 1-2 Q OF 2019 KEY PERFORMANCE INDICATORS
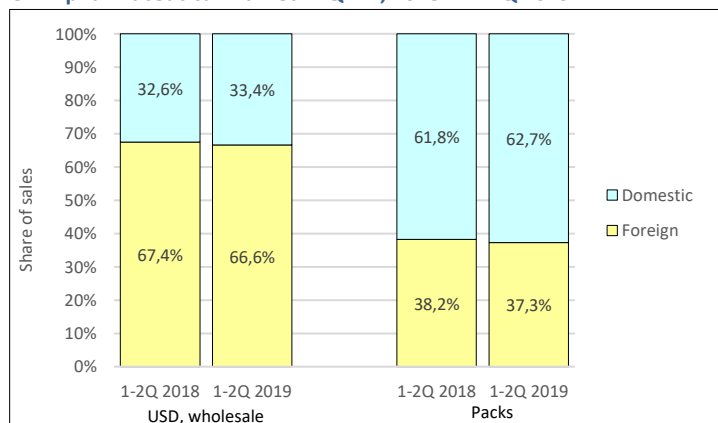
Macroeconomic indices

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

Value	June-January 2019	June-January 2019 (%) as % against June-January 2018
Industrial production index		101.3
Retail turnover, RUB bil.	1378.4	102.2
Monthly average accrued wage per one worker (nominal), RUB	40,008	107.7
real		102.2

Note: SiFD TOGS data

Figure 1. Dynamics of price index and price index for non-food products against December 2018
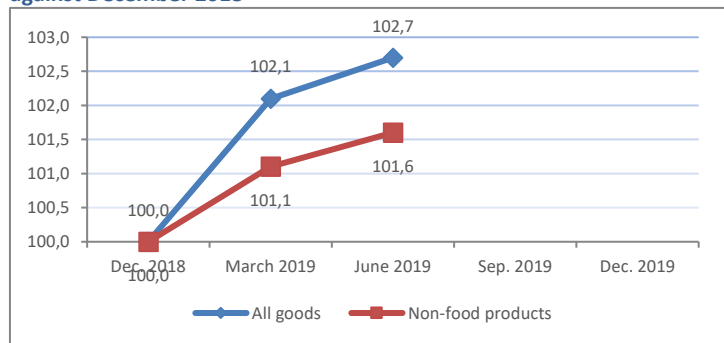
Indicators of price dynamics and retail margins

Figure 1. Dynamics of weighted average prices and retail margins in 1-2 Q 2018 – 1-2 Q 2019
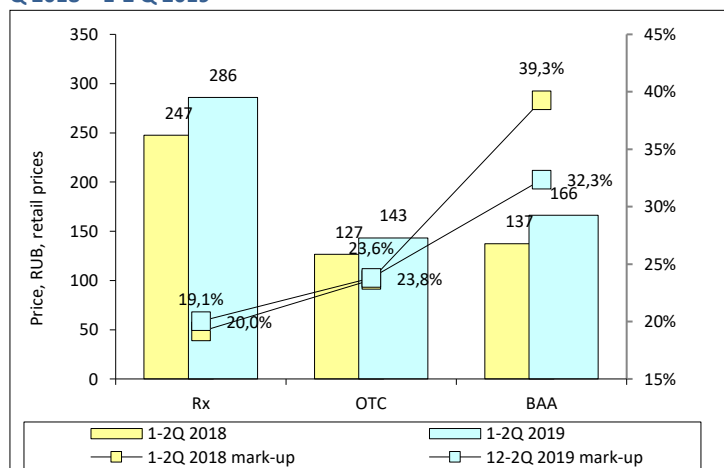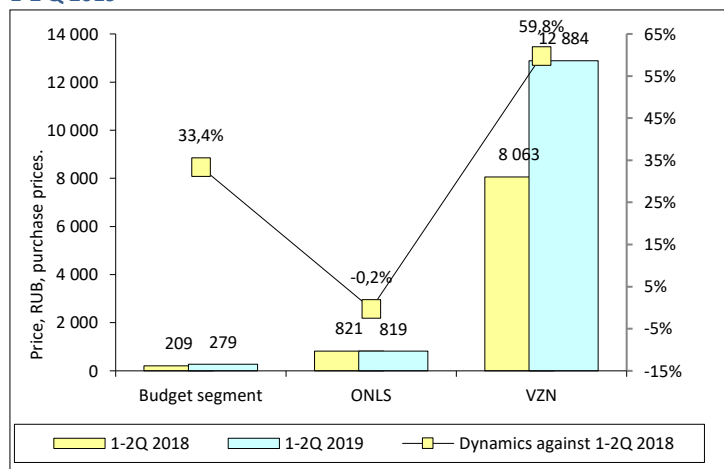

Figure 2. Dynamics of weighted average purchase prices in 1-2 Q, 2018 – 1-2 Q 2019

Indicators of the dynamics and structure of the market

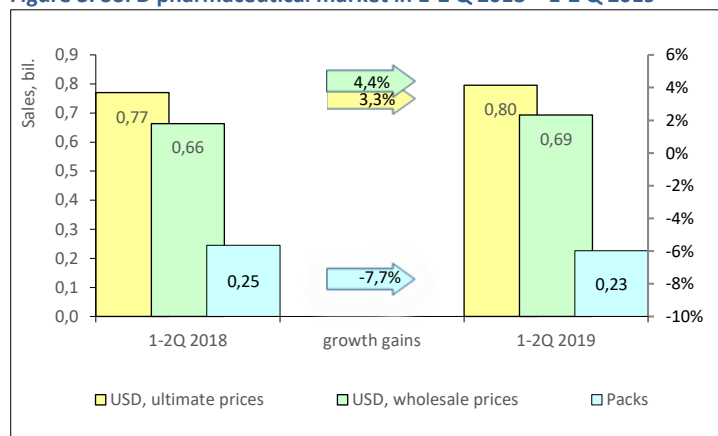### Figure 3. SFD pharmaceutical market in 1-2 Q 2018 – 1-2 Q 2019

Figure 4. Structure of SiFD pharmaceutical market by major segments in Q 1-2, 2018 – 1-2 Q 2019

Figure 5. Structure of the retail segment of SiFD market in 1-2 Q 2018 – 1-2 Q 2019

Figure 6. Dynamics of the Russian/ foreign drugs share in the structure of SiFD pharmaceutical market in 1-2 Q 2018 – 1-2 Q 2019

PHARMACEUTICAL MARKET OF THE SOUTHERN FEDERAL DISTRICT (SoFD) IN 1-2 Q OF 2019 KEY PERFORMANCE INDICATORS
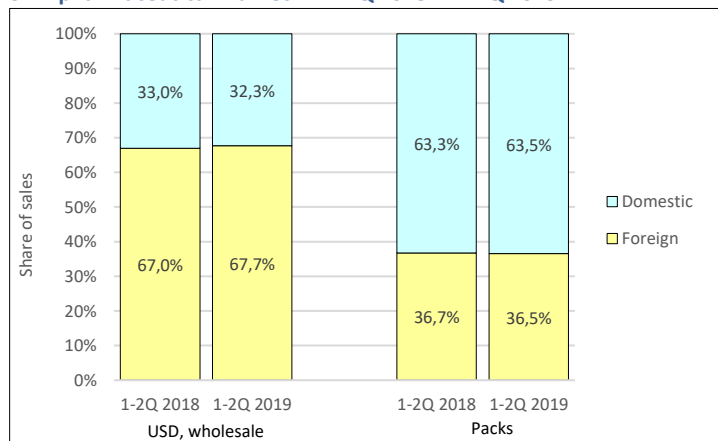
Macroeconomic indices

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

Value	June-January 2019	June-January 2019 (%) as % against June-January 2018
Industrial production index		103.9
Retail turnover, RUB bil.	1586.5	101.9
Monthly average accrued wage per one worker (nominal), RUB	33,093	107.1
real		101.8

Note: SoFD TOGS data

Figure 1. Dynamics of price index and price index for non-food products against December 2018
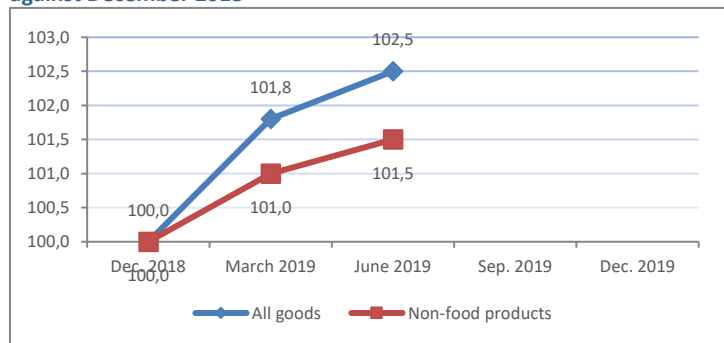
Indicators of price dynamics and retail margins

Figure 1. Dynamics of weighted average prices and retail margins in 1-2 Q 2018 – 1-2 Q 2019

Figure 2. Dynamics of weighted average purchase prices in 1-2 Q, 2018 – 1-2 Q 2019

Indicators of the dynamics and structure of the market

Figure 3. SoFD pharmaceutical market in 1-2 Q 2018 – 1-2 Q 2019

Figure 4. Structure of SoFD pharmaceutical market by major segments in 1-2 Q 2018 – 1-2 Q 2019
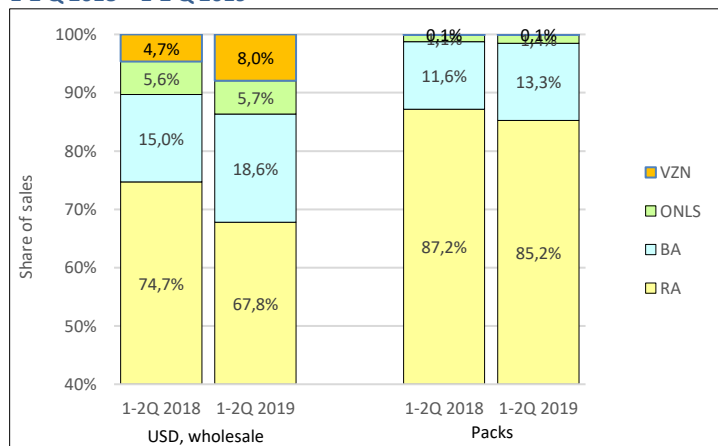

Figure 5. Structure of the retail segment of SoFD pharmaceutical market in 1-2 Q 2018 – 1-2 Q 2019
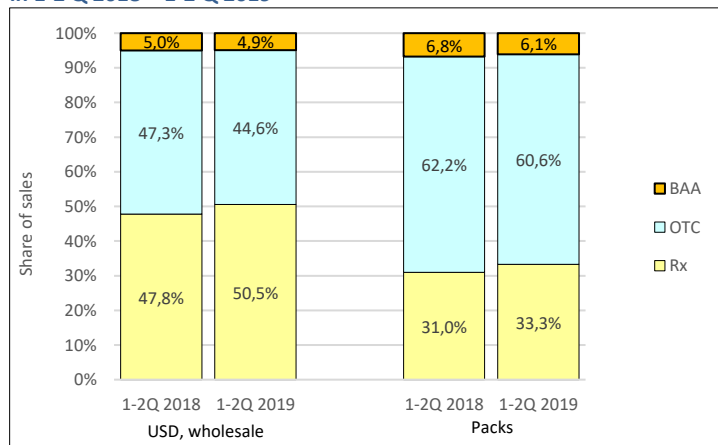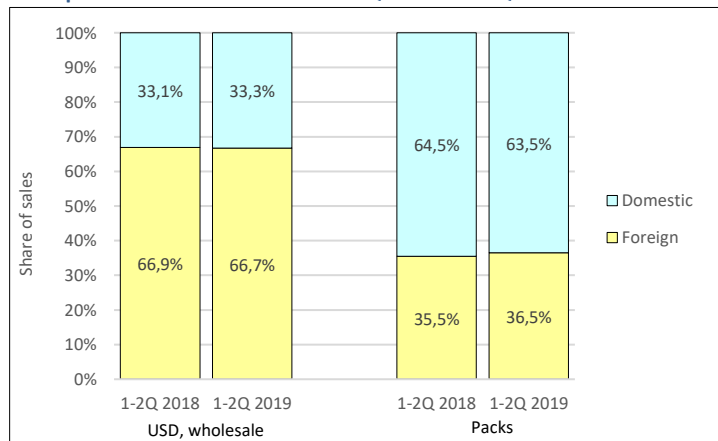

Figure 6. Dynamics of the Russian/ foreign drugs share in the structure of SoFD pharmaceutical market in 1-2 Q 2018 – 1-2 Q 2019

PHARMACEUTICAL MARKET OF THE FAR EASTERN FEDERAL DISTRICT (FEFD) IN 1-2 Q OF 2019 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	June-January 2019	June-January 2019 (%) as % against June-January 2018
Industrial production index		105.3
Retail turnover, RUB bil.	856.8	102.2
Monthly average accrued wage per one worker (nominal), RUB	54,274	107.8
real		102.8

Note: FEFD TOGS data

Figure 1. Dynamics of price index and price index for non-food products against December 2018
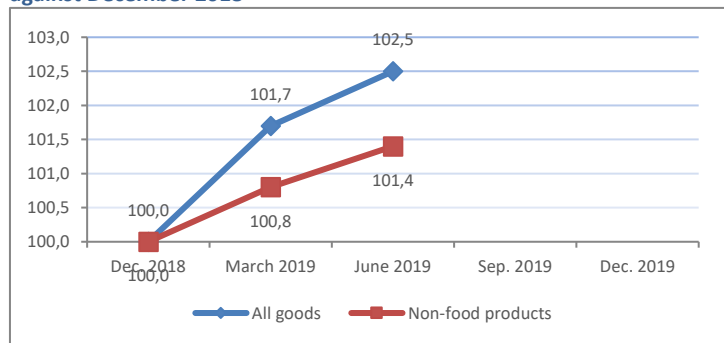
Indicators of price dynamics and retail margins

Figure 1. Dynamics of weighted average prices and retail margins in 1-2 Q 2018 – 1-2 Q 2019
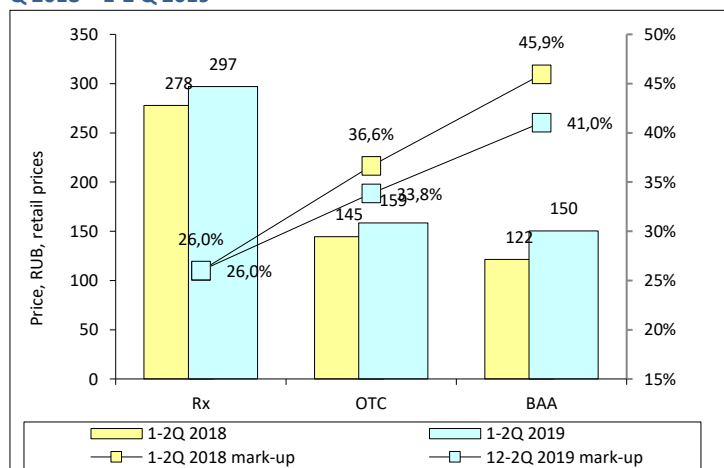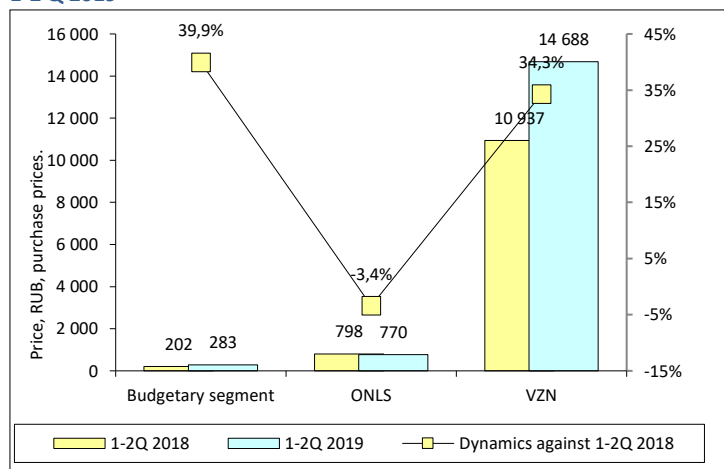

Figure 2. Dynamics of weighted average purchase prices in 1-2 Q, 2018 – 1-2 Q 2019

Indicators of the dynamics and structure of the market

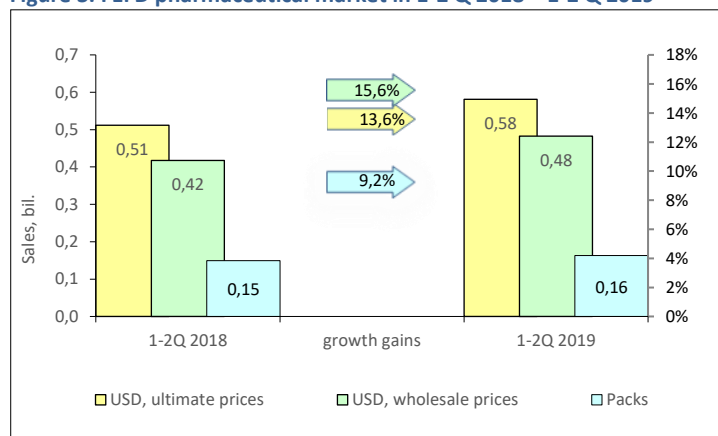### Figure 3. FEFD pharmaceutical market in 1-2 Q 2018 – 1-2 Q 2019

Figure 4. Structure of FEFD pharmaceutical market by major segments in 1-2 Q 2018 – 1-2 Q 2019
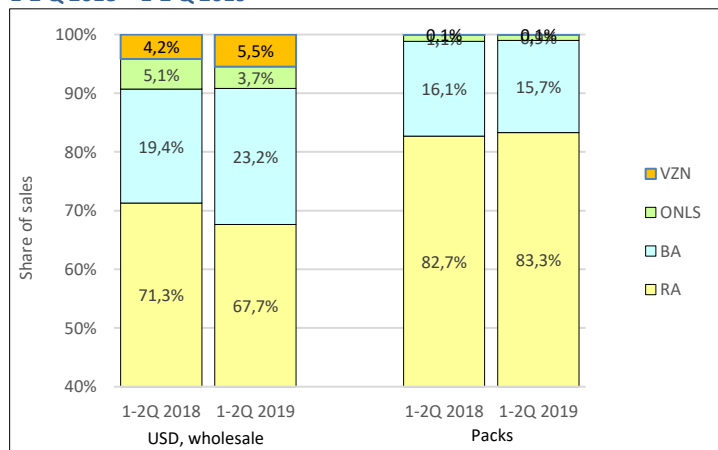

Figure 5. Structure of the retail segment of FEFD pharmaceutical market in 1-2 Q 2018 – 1-2 Q 2019
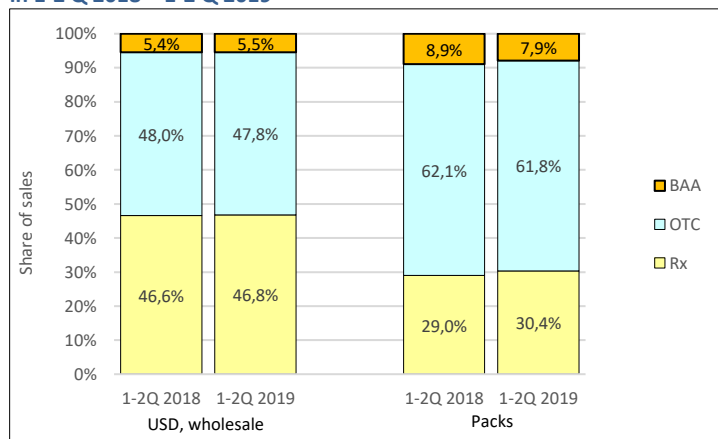

Figure 6. Dynamics of the Russian/ foreign drugs share in the structure of FEFD pharmaceutical market in 1-2 Q 2018 – 1-2 Q 2019