

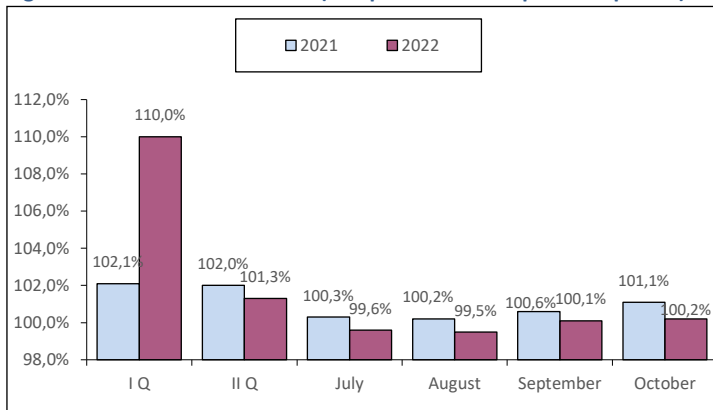
MACROECONOMIC INDICES

Inflation

According to Federal State Statistics Service's data, the Consumer Price Index was estimated as 100.2% in October 2022, compared to the previous month, 110.7% as compared to December in 2021.

In October 2022, the Producer Price Index for industrial production was 97.5% as compared to the previous month and 99.2% in the month-earlier period. The index accounted for 98.0% against December of 2021.

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



Living standard

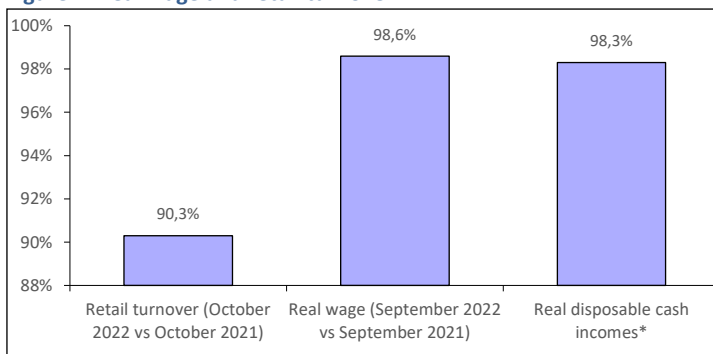
In September 2022, a gross monthly average wage of corporate employees reached RUB 61,879 (USD 1034.94). It accounted for 112.1% compared to September 2021, and 103.3% compared to the previous period. In September 2022, the real gross wage accounted for 98.6% as compared to September 2021, and 103.2% against the prior period.

According to estimates¹, real disposable cash incomes accounted for 98.3% in January-September of 2022 as compared to January-September of 2021 (Fig. 2).

Retail turnover

In October 2022, the retail turnover was equal to RUB 3584.3 bil. or 90.3% (in comparable prices) against the respective period of the previous year, and RUB 34783.1 bil. or 94.1% in January - October 2022 (Fig. 2).

Figure 2. Real wage and retail turnover



* January-September 2022 vs. January-September 2021.

Industrial Production

According to Federal State Statistics Service's data, in October 2022 Industrial Production Index accounted for 97.4% compared to the same period of the previous year, and 100.1% in January - October 2022.

According to Federal State Statistics Service's data, Industrial Production Index for drugs and medical products accounted for 91.5% in October 2022 compared to the same period of 2021, and 117.8% in January-October 2022 compared to January-October in 2021.

Domestic production

Table 1 provides the top 10 domestic pharmaceutical manufacturers according to their volumes of sales in all segments of the market based on the results for October 2022.

Table 1. Top ten Russian chemical and pharmaceutical manufacturers by sales volume in October 2022

Rank	Manufacturer	RUB mil.
1	Stada	3150.8
2	Otcpharm	2919.8
3	Biocad	2632.8
4	Binnopharm	2349.7
5	Pharmstandart	2108.1
6	Servier	1891.6
7	Grotex	1877.4
8	Microgen	1564.6
9	Valenta	1545.3
10	Vertex	1537.1

Source: IQVIA

Table 2 provides pharmacy sales data from 10 regions of the Russian Federation. In September 2022 compared to August 2022, growth in sales (in terms of roubles) was observed almost in all regions. The most pronounced growth in sales was observed in St. Petersburg (+36%), the least one in Krasnoyarsk Krai (+10%). The sales dropped by 3% in the Krasnodar Krai.

Table 2. Pharmacy sales in the regions, 2022

Region	Pharmacy sales, \$ mil. (Wholesale prices)			Growth gain, % (roubles)		
	July 2022	August 2022	September 2022	July/June 22	August/July 22	September/August 22
Moscow	177.5	200.2	259.3	-15%	17%	28%
St. Petersburg	77.7	86.7	119.3	-21%	16%	36%
Krasnodar Krai	72.8	83.7	81.6	6%	20%	-3%
Krasnoyarsk Krai	30.0	33.5	37.2	-7%	16%	10%
Tatarstan	30.4	32.2	39.2	-2%	10%	20%
Rostov Region	33.5	39.1	44.1	-3%	21%	12%
Novosibirsk Region	28.5	31.5	38.2	-14%	15%	20%
Voronezh Region	21.4	23.7	29.5	-6%	15%	23%
Perm	10.1	9.5	11.7	1%	-2%	22%
Iyumen	11.4	12.3	14.4	-4%	12%	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 October 2022

Rank	Company*	Amount of broadcasts
1	Materia Medica	13,217
2	Stada	8,607
3	Binnopharm Group	6,349
4	Polpharma	5,461
5	Evalar	4,581

Source - Remedium according to Mediascope's data

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

Rank	Brand*	Amount of broadcasts
1	Evalar	4,161
2	Rengalin	3,938
3	Renewal	3,386
4	Trekrezan	3,325
5	Ergoferon	3,150

Source - Remedium according to Mediascope's data

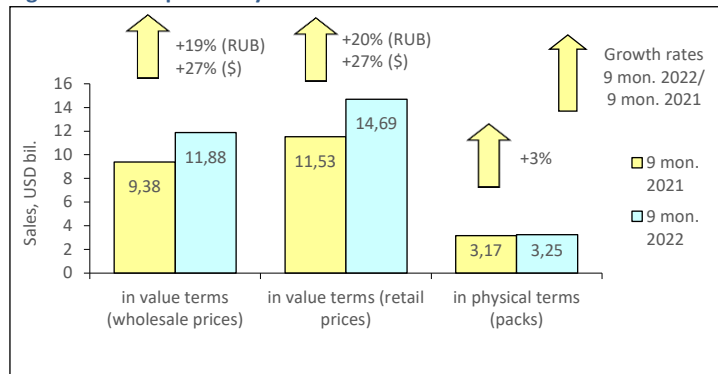
* Only drugs registered with National Medicine Register were considered.

¹ Due to switching of Federal State Statistics Service to the updated methodology for calculating real disposable cash incomes of the population, the data are published once a quarter.

RUSSIAN PHARMACY FPP DRUG MARKET: 2022 FIRST NINE MONTHS RESULTS

According to the results of the Retail Audit of FPP (Finished Pharmaceutical Products) in Russian Federation™, at the end of the first nine months of 2022 the sales of drugs in physical terms in the country saw a +3% continued to grow and reached 3.253 bil. packs as compared to the same period of 2021. In money terms, the market increased by 19% in terms of roubles and 27% in terms of dollars. The volume of the market amounted to RUB 828.241 bil. (USD 11.884 bil.) at wholesale prices (Fig. 1). The average cost of an OTC pack at retail prices proved to be higher than the previous year figure: USD 4.52 in January-September of 2022 vs USD 3.64 in 2021. Consumer spending for drugs in Russia averaged to USD 100.95 for 9 months of 2022, whereas during the same period a year ago it averaged to USD 78.89.

Figure 1. Russia pharmacy market for 9 months of 2021 – 9 months 2022.*



Based on the results for the first nine month of 2022, BAYER (+11%²) continued to show the highest sales on the Russian retail market among the drug manufacturers, though its market share reduced due to lagging behind the growth rates (Table 1). STADA (+35%), which showed the highest sales rates in the top ten ranking, was ranked second and moved one rank up. The market of SERVIER (+22%) developed by almost equally high growth rates, which allowed it to move from rank six to four. In addition to the above-mentioned manufacturers, GLAXOSMITHKLINE (+19%) and BERLIN-CHEMIE/MENARINI (+13%), which rounded out the top ten ranking, also rose in the ranks. Note that the latter became the only newcomer of the top-10 ranking. At the same time, OTCPHARM (+14%), SANOFI (+4%) and TEVA (+11%) lost one ranks each and moved down to ranks three, five and six, respectively. ABBOTT (+17%) and KRKA (+19%) held their previous ranks seven and eight. The total share of the top ten manufactures reduced by 1.2 p.p. compared to the same period of 2021 and accounted for 32.4%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten		Manufacturer*	Share in total pharmacy sales, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	BAYER	4.6	5.0
2	3	STADA	3.9	3.7
3	2	OTCPHARM	3.6	3.8
4	6	SERVIER	3.2	3.2
5	4	SANOFI	3.2	3.6
6	5	TEVA	2.9	3.2
7	7	ABBOTT	2.9	3.0
8	8	KRKA	2.9	2.9
9	10	GLAXOSMITHKLINE	2.7	2.7
10	11	BERLIN-CHEMIE/MENARINI	2.5	2.7
Total			32.4	33.6

*AIPM members are in bold

Three of the top-10 brands held their own in the ranking (Table 2). XARELTO (+1%) held its rank number one, and DETRALEX (+20%) and NUROFEN (+15%) kept their previous ranks five and six. Three brands with outstripping growth rates managed to improve their ranks. ARBIDOL (+25%) and INGAVIRIN (+27%) moved up to ranks two and six, and the newcomer THERAFLU (+45%) broke into the ranks of the top ten brands, rounding it out. At the same time, the former two displaced ELIQUIS (+15%), HEPTRAL (+6%), CONCOR (+8%) and MEXIDOL (+11%) down one rank. The total share of the top 10 brands decreased from 8.0% to 7.7%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten		Brand	Share in total pharmacy sales, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	XARELTO	1.2	1.5
2	3	ARBIDOL	1.1	1.0
3	2	ELIQUIS	1.1	1.1
4	4	DETRALEX	0.7	0.7
5	5	NUROFEN	0.7	0.7
6	9	INGAVIRIN	0.6	0.6

* Here and elsewhere, we shall use IQVIA's data

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

Rank in the top ten		Brand	Share in total pharmacy sales, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
7	6	HEPTRAL	0.6	0.7
8	7	CONCOR	0.6	0.6
9	8	MEXIDOL	0.6	0.6
10	15	THERAFLU	0.6	0.5
Total			7.7	8.0

The leader in the top 10 INN and generic names ranking changed: RIVAROXABAN (+1%) which used to top the ranking showed a low sales growth and moved down to rank four, giving way to the more dynamic INNs XYLOMETAZOLINE (+23%), UMIFENOVIR (+29%) and DIOSMIN*HESPERIDIN (+28%) (Table 3). Another three INNs developed their markets at a fast pace. IBUPROFEN (+25%) and NIMESULIDE (+31%) moved up to ranks five and six, and ROSUVASTATIN (+26%) also kept its previous rank ten. PANCREATIN (+12%) also held its previous rank nine. APIXABAN (+15%) and BISOPROLOL (+11%) moved down to ranks seven and eight, being displaced by the more dynamic manufacturers. The total share of the top 10 INNs and grouping names did not virtually change: 11,2% vs 11,1% in the year-earlier period.

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

Rank in the top ten		INN/Grouping name	Share in total public segment, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	2	XYLOMETAZOLINE	1.5	1.4
2	3	UMIFENOVIR	1.3	1.2
3	4	DIOSMIN*HESPERIDIN	1.2	1.2
4	1	RIVAROXABAN	1.2	1.5
5	6	IBUPROFEN	1.1	1.1
6	8	NIMESULIDE	1.1	1.0
7	5	APIXABAN	1.1	1.1
8	7	BISOPROLOL	0.9	1.0
9	9	PANCREATIN	0.9	1.0
10	10	ROSUVASTATIN	0.9	0.8
Total			11.2	11.1

The top ten ATC groups showed high stability - seven of its groups held their own in the ranking (Table 4). It should be noted that most of the top ten ATC groups demonstrated outperformance rates. C09 Agents acting on the rennin-angiotensin system (+20%) and M01 Anti-inflammatory and antirheumatic products (+25%) moved to the first ranks, whereas J05 Antivirals for systemic use and G03 Sex hormones (+29% each), R01 Nasal preparations (+24%) and C05 Vasoprotectives (+20%) moved to ranks four through six and nine. N02 Analgesics (+25%) and N06 Psychoanaleptics (+23%) moved up to ranks seven and eight. B01 Antithrombotic agents (+5%) and A07 Antidiarrheals (+14%) showed lagging behind growth rates, at the same time the former managed to keep its previous rank three, and the latter moved one rank up and broke into the ranks of the top ten ranking. In total, the top ten ATC groups accumulated 37.6%, whereas in the year-earlier period — 37.1%.

Table 4. The top ten ATC groups by pharmacy sales

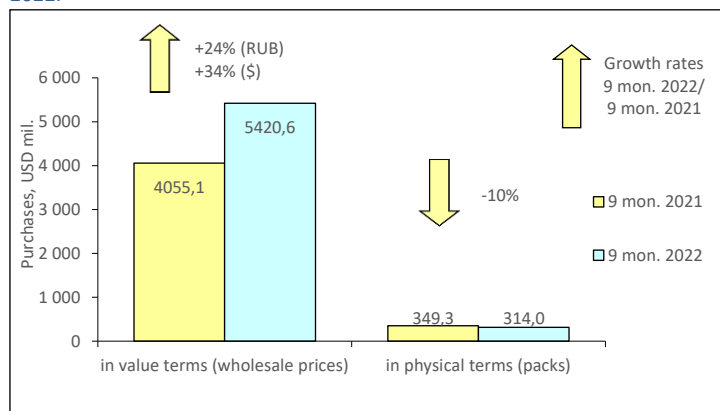
Rank in the top ten		ATC code	ATC group	Share in total pharmacy sales, %	
9 mon. 2022	9 mon. 2021			9 mon. 2022	9 mon. 2021
1	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.3	5.3
2	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.2	5.0
3	3	B01	ANTITHROMBOTIC AGENTS	4.2	4.7
4	4	J05	ANTIVIRALS FOR SYSTEMIC USE	3.9	3.6
5	5	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.8	3.5
6	6	R01	NASAL PREPARATIONS	3.5	3.3
7	8	N02	ANALGESICS	3.2	3.1
8	10	N06	PSYCHOANALEPTICS	2.9	2.9
9	9	C05	VASOPROTECTIVES	2.9	2.9
10	11	A07	ANTIDIARR.,INTEST. ANTIINFL./ANTIINFECT. AGENTS	2.7	2.8
Total				37.6	37.1

Conclusion. In January-September of 2022, the retail pharmacy market of the country reached RUB 1023.4 bil. (USD 14.694 bil.). As compared with the same period of 2022, the growth rates were positive both (+20%) in terms of roubles, and in terms of dollars (+27%). In pack terms, the market increased by 3% compared to the previous year and amounted to 3.253 bil. packs. In a period of 9 months of 2022, the average cost of an FPP pack in the national pharmacies was USD 4.52, whereas in the year-earlier period it was USD 3.64. The average expenses of the Russian Federation residents for purchase of drugs in the pharmacies based on the results for the analysed period of 2022 increased as compared to 2021 (USD 100.95 vs. USD 78.89).

RUSSIAN FEDERATION HOSPITAL MARKET: 2022 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 2022 the public procurement segment of the country in physical terms reduced by 10% as compared to the same period of the previous year and amounted to 314.028 mil. packs. In value terms, the market expanded by 24% in terms of roubles and 34% - in terms of dollars and reached RUB 370.508 bil. (USD 5.421 bil.) at wholesale prices. Based on the results for 9 months of 2022, the average cost of an FFP pack in the hospital sector was USD 17.26, whereas in the year-earlier period its cost was USD 11.61.

Figure 1. Russia's public procurement sector for 9 months of 2021 – 9 months 2022.*



In January-September 2022, most manufacturers from the top ten ranking in the public procurement segment continued to show positive growth rates (Table 1). At the same time, five of them had outstripping rates, which allowed them to improve their rating positions. MSD (+58%) topped the top ten ranking, whereas BIOCAD (+35%), NOVARTIS (+61%) and PHARMASYNTEZ (+75%), which moved up to ranks three through five respectively. ASTRAZENECA (2.2-fold growth in purchases) showed more than a twofold increase in purchases, which allowed it to broke into the top 10 ranking for the first time and move up to rank seven. At the same time, the less dynamic ROCHE (+31%) and BRISTOL MYERS (+11%), on the contrary, lost one rating point each. JOHNSON & JOHNSON (-36%), R-PHARM (-13%) and PFIZER (-21%), which reduced purchase volumes, moved down to the bottom of the top 10 ranking. In total, the top ten manufacturers accounted for 47.8% of the public procurement segment against 48.5% in the year-earlier period.

Table 1. The top 10 manufacturers by public segment volume

Rank in the top ten		Manufacturer*	Share in total public segment, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	3	MSD	7.8	6.1
2	1	ROCHE	7.4	8.0
3	4	BIOCAD RF	6.6	6.0
4	8	NOVARTIS	4.7	3.6
5	9	PHARMASYNTEZ	4.3	3.0
6	5	BRISTOL MYERS SQU	4.1	4.6
7	13	ASTRAZENECA	3.6	2.0
8	2	JOHNSON & JOHNSON	3.2	6.2
9	6	R-PHARM	3.2	4.5
10	7	PFIZER	2.8	4.4
Total			47.8	48.5

*AIPM members are in bold

KEYTRUDA (+61%) and the less dynamic OPDIVO (+10%) continue to remain the bestselling brands in the regional hospital market (Table 2). They were followed by two newcomers ILSIRA (+81%) and ZOLGENSMA (+87%) there in the top ten brands ranking. One more newcomer, ESPERAVIR, broke into the top ten brands, moving up to rank nine. In addition to the newcomers, another three INNs of the top ten ranking managed to rise in the ranks. TIVICAY (+33%), SANDOZ (+40%) and KADCYLA (+27%) moved up to ranks five, seven and eight. AVEGRA (+20%) held its previous rank six, and only EVRYSDI, which reduced its purchases by 1%, moved down to a lower rank and rounded out the top ten. The total share of the top 10 brands in the public segment expanded from 18.9% to 22.6%.

Table 2. The top 10 brands by public segment volume

Rank in the top ten		Brand	Share in total public segment, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	KEYTRUDA	4.8	3.7
2	2	OPDIVO	3.2	3.6
3	11	ILSIRA	2.2	1.5
4	12	ZOLGENSMA	2.2	1.5
5	8	TIVICAY	1.9	1.8
6	6	AVEGRA BIOCAD	1.8	1.9
7	9	PERJETA	1.8	1.6

* Here and elsewhere, we shall use IQVIA's data

Rank in the top ten		Brand	Share in total public segment, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
8	10	KADCYLA	1.6	1.6
9	N/A	ESPERAVIR	1.5	N/A
10	7	EVRYSDI	1.5	1.8
Total			22.6	18.9

Following the respective brands, PEMBROLIZUMAB (+61%) and NIVOLUMAB (+10%) retained their first ranks in the top ten INNs and grouping names ranking (Table 3). Shifts took place in the lower part of the top ten, whereas all remaining INNs from the top ten ranking rose in the ranks. FAVIPRAVIR (+19%) moved up to rank three from six, BEVACIZUMAB (+31%) and DOLUTEGRAVIR (+33%) moved up to ranks seven and eight from eight and ten. The newcomers LEVILIMAB (+81%), ONASEMNOGENE ABEPARVOVEC (+87%), MOLNUPIRAVIR, PERTUZUMAB (+40%) and TRASTUZUMAB EMTANSINE (+27%) broke into the top ten ranking, moving up to ranks four through six and two bottom ranks, respectively. The total share accumulated by the top-ten INNs and grouping names increased from 20.1% to 24.8%.

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

Rank in the top ten		INN/Grouping name	Share in total public segment, %	
9 mon. 2022	9 mon. 2021		9 mon. 2022	9 mon. 2021
1	1	PEMBROLIZUMAB	4.8	3.7
2	2	NIVOLUMAB	3.2	3.6
3	6	FAVIPRAVIR	2.7	2.8
4	13	LEVILIMAB	2.2	1.5
5	15	ONASEMNOGENE ABEPARVOVEC	2.2	1.5
6	N/A	MOLNUPIRAVIR	2.1	N/A
7	8	BEVACIZUMAB	2.1	2.0
8	10	DOLUTEGRAVIR	1.9	1.8
9	11	PERTUZUMAB	1.8	1.6
10	12	TRASTUZUMAB EMTANSINE	1.6	1.6
Total			24.8	20.1

Most of the top-10 ATC groups retained their positions unchanged (Table 4). L01 Antineoplastic agents (+31%), J05 Antivirals for systemic use (+73%) and L04 Immunosuppressants (-11%) held the first ranks in the top ten ranking, and B01 Antithrombotic agents (-9%), J01 Antibacterials for systemic use (-7%) and B05 Blood substitutes and perfusion solutions (+14%) kept their previous ranks six through eight, respectively. The groups M09 Other drugs for disorders of the musculoskeletal system (-3%) and J06 Immune sera and immunoglobulins, which increased their purchases by 3.3 times and became the only newcomer of the top ten ranking, were noted for the rating progress. At the same time, J07 Vaccines (-18%) and L02 Endocrine therapy (+18%) moved one rank down, coming in at numbers five and ten. In total, the top ten ATC groups accumulated 81.7% of purchases in the public procurement sector, 83.5% in the year-earlier period.

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

Rank in the top ten		ATC code	ATC group	Share in total public segment, %	
9 mon. 2022	9 mon. 2021			9 mon. 2022	9 mon. 2021
1	1	L01	ANTINEOPLASTIC AGENTS	30.6	28.8
2	2	J05	ANTIVIRALS FOR SYSTEMIC USE	18.1	12.9
3	3	L04	IMMUNOSUPPRESSANTS	5.9	8.2
4	5	M09	OTHER DRUGS FOR DISORD. OF THE MUSCULO-SKELET.SYST	5.5	7.0
5	4	J07	VACCINES	5.4	8.1
6	6	B01	ANTITHROMBOTIC AGENTS	4.7	6.4
7	7	J01	ANTIBACTERIALS FOR SYST USE	4.6	6.1
8	8	B05	PLASMA SUBSTITUTES AND PERFUSION SOLUTIONS	2.6	2.9
9	14	J06	IMMUNE SERA & IMMUNO-GLOBULIN	2.3	0.9
10	9	L02	ENDOCRINE THERAPY	2.0	2.1
Total				81.7	83.5

Conclusion. Based on the results for the first nine months of 2022, the public procurement sector of Russia expanded by 24% in rouble terms and by 34% in dollar terms, and stood at RUB 370.508 bil. (USD 5.421 bil.). In pack terms, the market reduced by 10% and amounted to 314.028 mil. packs. At the end of January-September 2022, the average cost of a finished pharma product (FFP) pack in the public procurement segment amounted to USD 17.26 vs. USD 11.61 in the year earlier period.

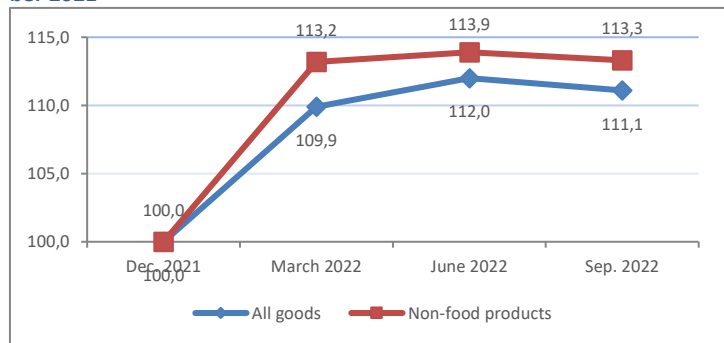
Macroeconomic indices

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

Value	December-September 2022	December-September 2022 (%) vs. December-September 2021
Industrial production index		103.7
Retail turnover, RUB bil.	10,643.3	92.1
Monthly average accrued wage per worker (nominal), RUB	78,254	111.8
Real		97.6

Note: CFD TOGS data

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



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 2021 – 1-3 Q 2022*

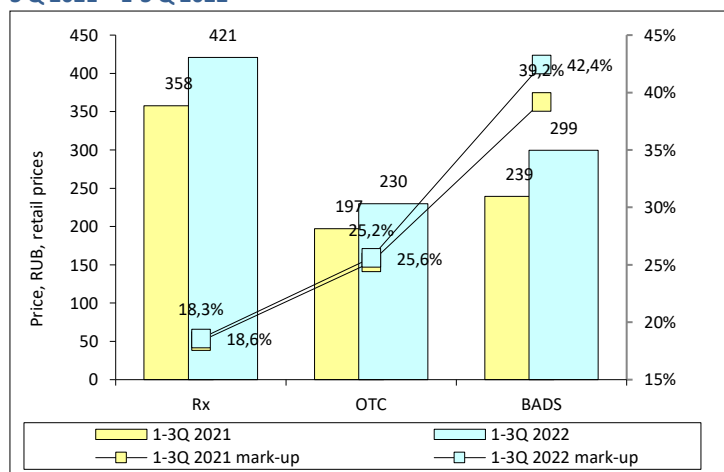
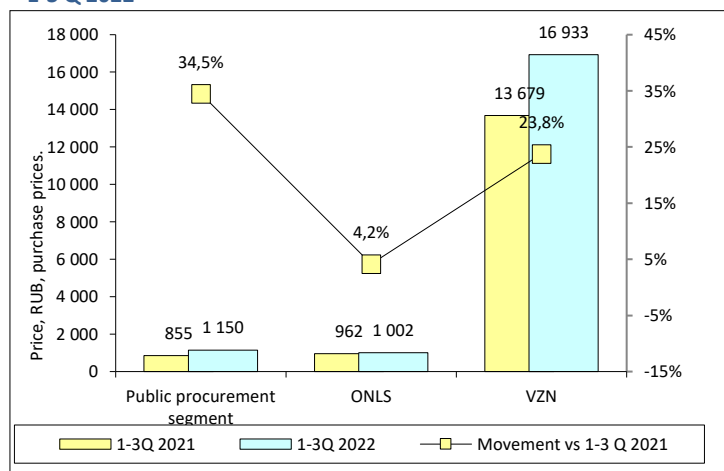


Figure 2. Movement of weighted average purchase prices in 1-3 Q 2021 – 1-3 Q 2022



Indicators of the market movement and profile³ (according to IQVIA data)

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

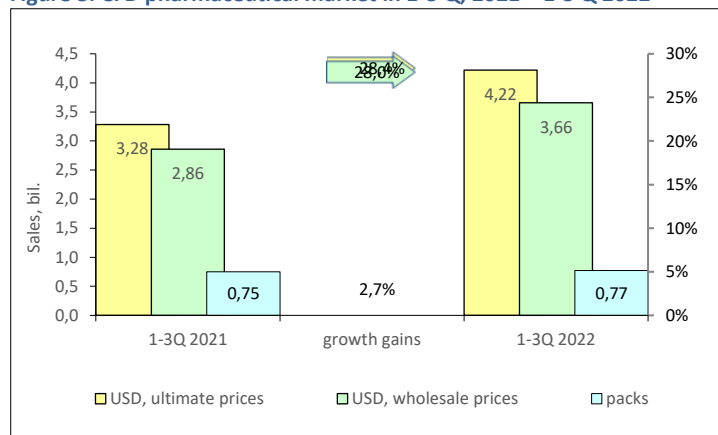


Figure 4. Major segment profile of CFD pharmaceutical market in 1-3 Q, 2021 – 1-3 Q 2022

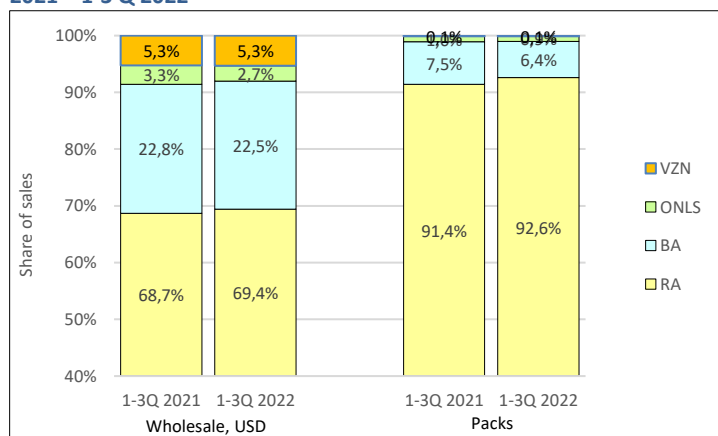


Figure 5. Retail segment profile of CFD market in 1-3 Q, 2021 – 1-3 Q 2022

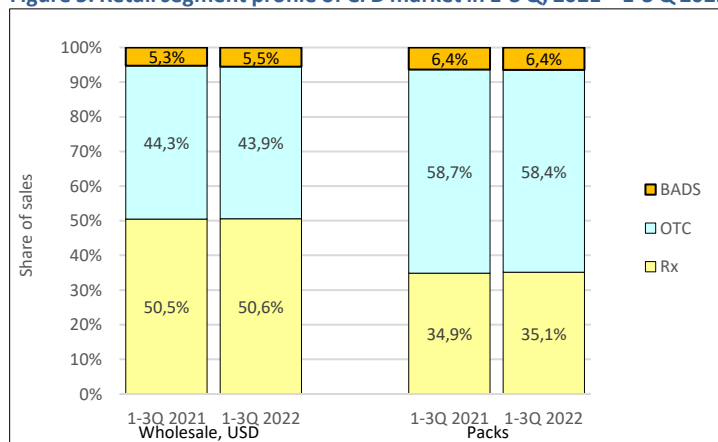
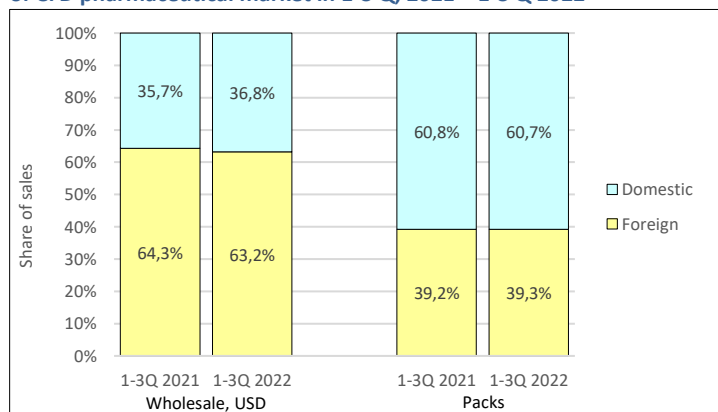


Figure 6. Movement of the Russian/foreign drugs share in the structure of CFD pharmaceutical market in 1-3 Q, 2021 – 1-3 Q 2022



* Here and elsewhere, IQVIA's data are used

³ Exclusive of Moscow

PHARMACEUTICAL MARKET OF THE NORTH-WESTERN FEDERAL DISTRICT (NWFD) IN 1-3 Q 2022. KEY PERFORMANCE INDICATORS

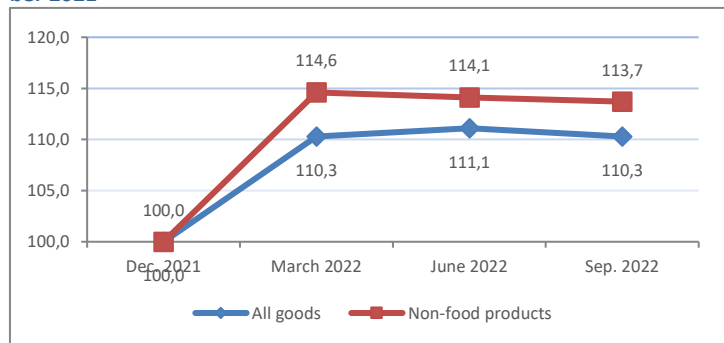
Macroeconomic indices

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

Value	December-September 2022	December-September 2022 (%) vs. December-September 2021
Industrial production index		99.7
Retail turnover, RUB bil.	3,203.1	93.6
Monthly average accrued wage per worker (nominal), RUB	68,822	112.0
Real		98.1

Note: NWFD TOGS data

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



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 2021 – 1-3 Q 2022*

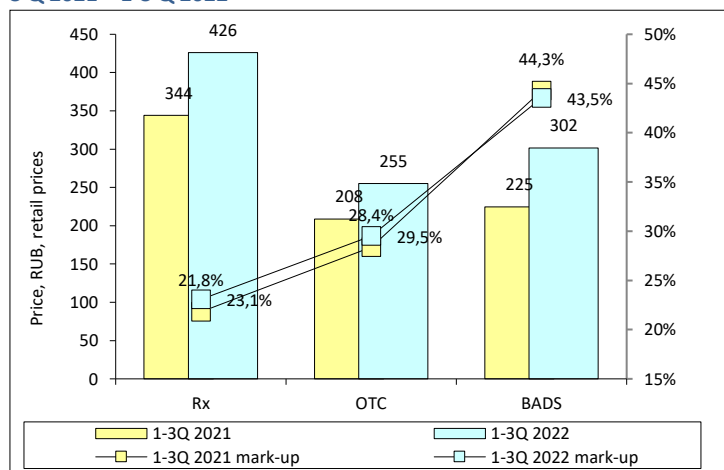
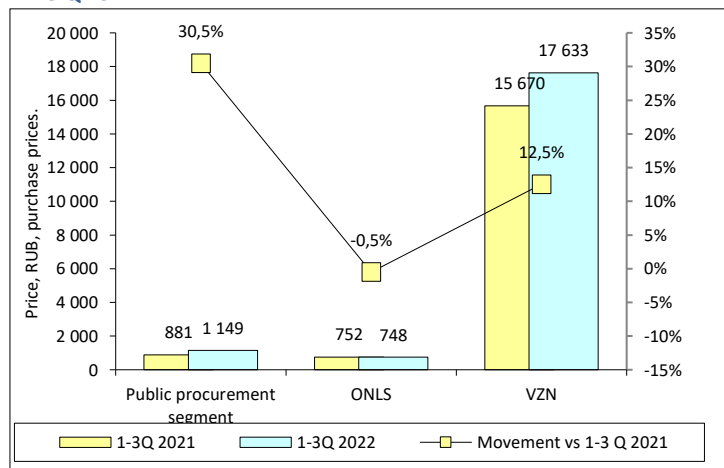


Figure 2. Movement of weighted average purchase prices in 1-3 Q 2021 – 1-3 Q 2022



Indicators of the market movement and profile⁴ (according to IQVIA data)

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

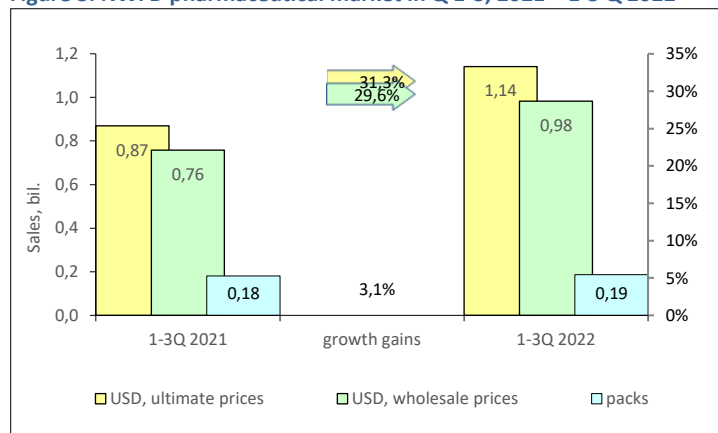


Figure 4. Major segment profile of NWFD pharmaceutical market in 1-3 Q, 2021 – 1-3 Q 2022

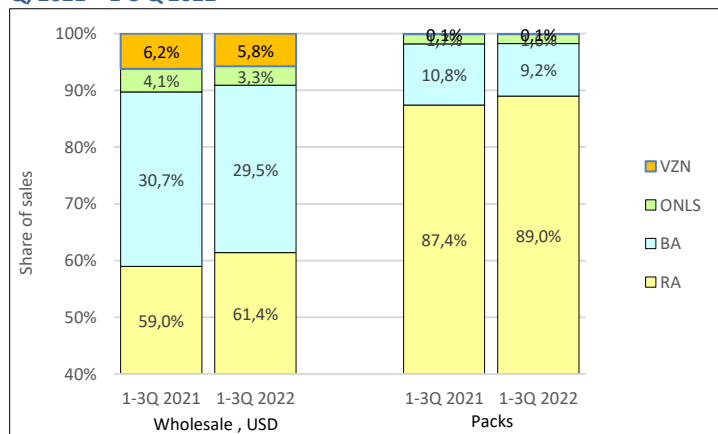


Figure 5. Retail segment profile of NWFD pharmaceutical market in 1-3 Q, 2021 – 1-3 Q 2022

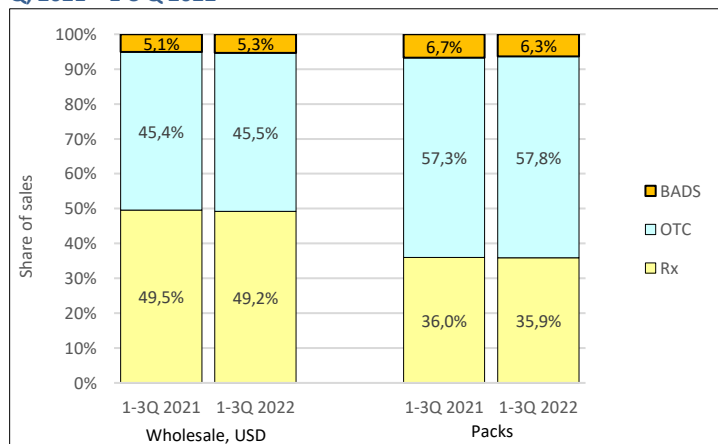
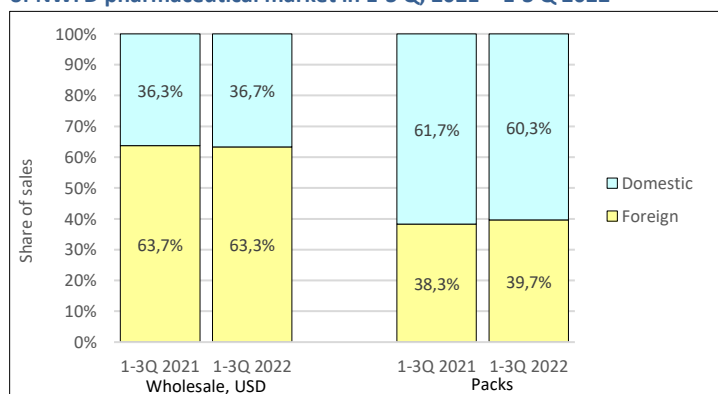


Figure 6. Movement of the Russian/ foreign drugs share in the structure of NWFD pharmaceutical market in 1-3 Q, 2021 – 1-3 Q 2022



* Here and elsewhere, IQVIA's data are used

⁴ Exclusive of St. Petersburg

PHARMACEUTICAL MARKET OF THE VOLGA FEDERAL DISTRICT (VFD) IN 1-3 Q 2022. KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	December-September 2022	December-September 2022 (%) vs. December-September 2021
Industrial production index		100.6
Retail turnover, RUB bil.	5,342.0	95.7
Monthly average accrued wage per worker (nominal), RUB	44,722	113.4
Real		98.7

Note: VFD TOGS data

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



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 2021 – 1-3 Q 2022*

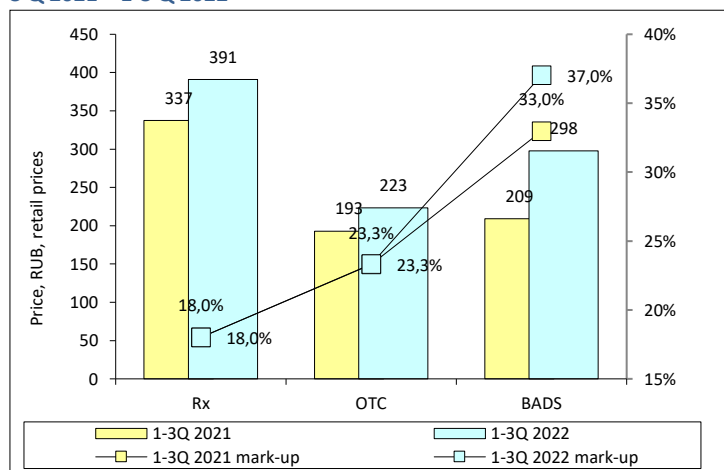
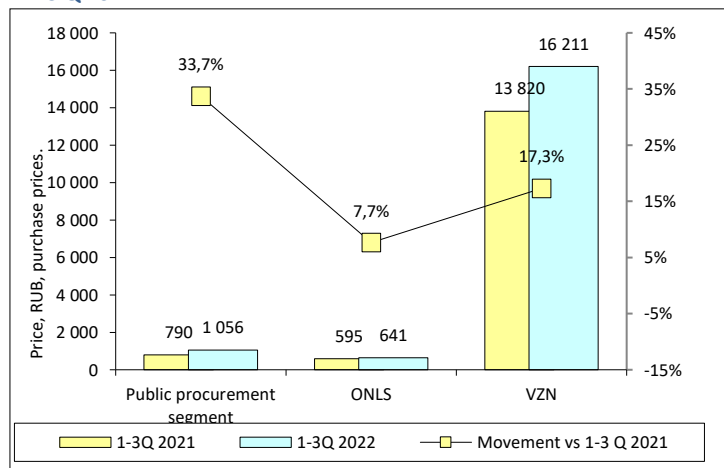


Figure 2. Movement of weighted average purchase prices in 1-3 Q 2021 – 1-3 Q 2022



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

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

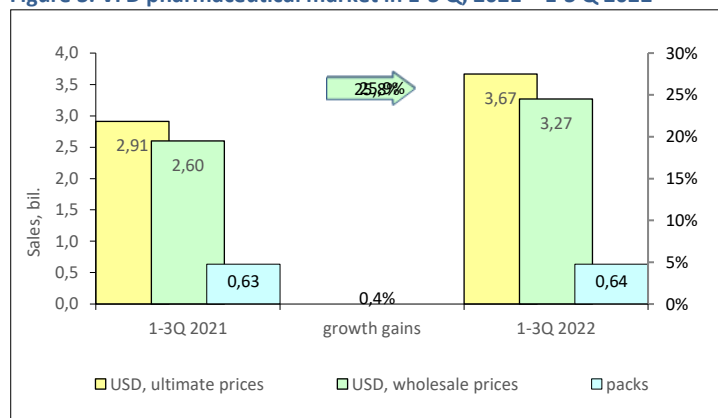


Figure 4. Major segment profile of VFD pharmaceutical market in 1-3 Q, 2021 – 1-3 Q 2022

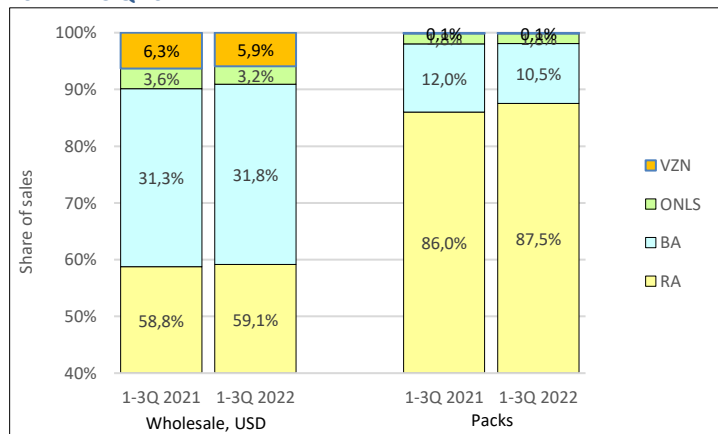


Figure 5. Retail segment profile of VFD market in 1-3 Q, 2021 – 1-3 Q 2022

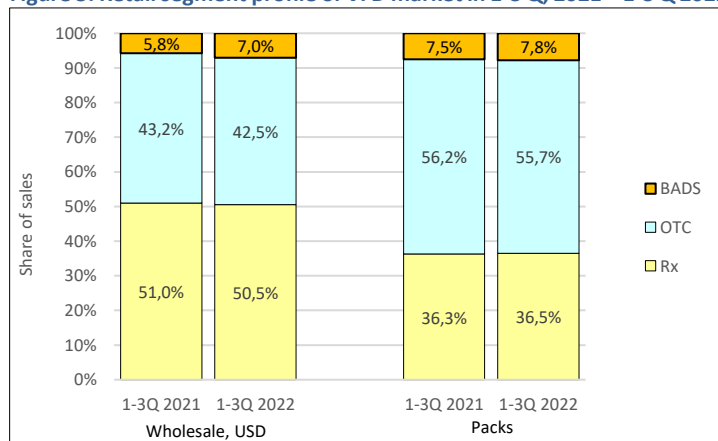
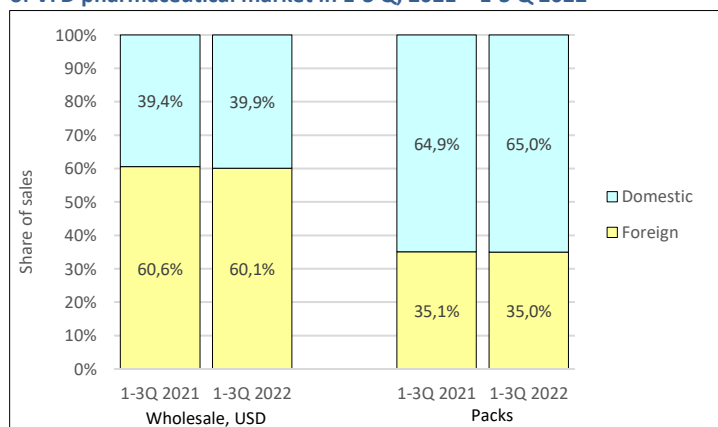


Figure 6. Movement of the Russian/foreign drugs share in the structure of VFD pharmaceutical market in 1-3 Q, 2021 – 1-3 Q 2022



* Here and elsewhere, IQVIA's data are used

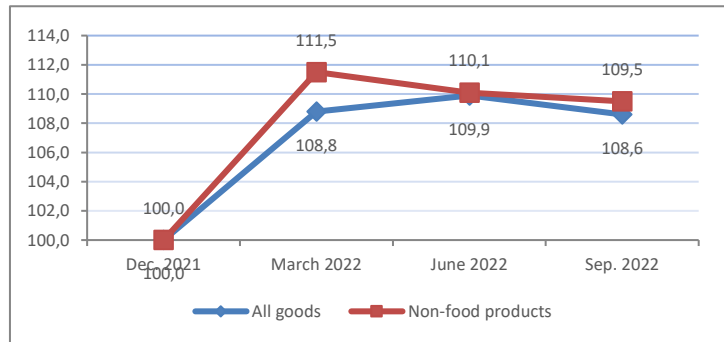
Macroeconomic indices

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

Value	December-September 2022	December-September 2022 (%) vs. December-September 2021
Industrial production index		100.5
Retail turnover, RUB bil.	2,468.2	95.2
Monthly average accrued wage per worker (nominal), RUB	65,847	112.9
Real		100.8

Note: VFD TOGS data

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



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 2021 – 1-3 Q 2022*

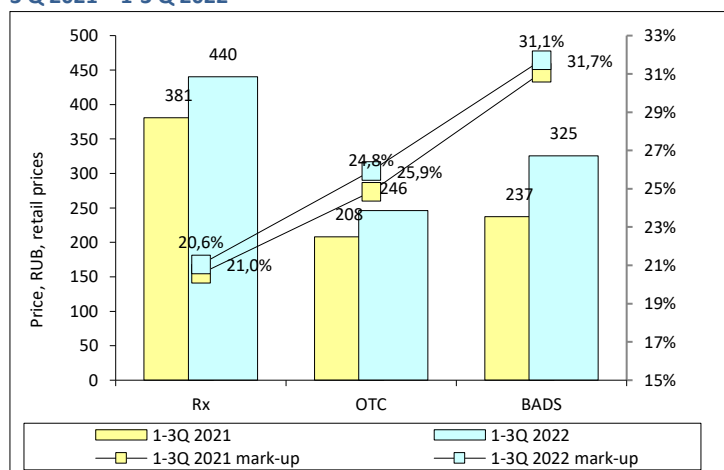
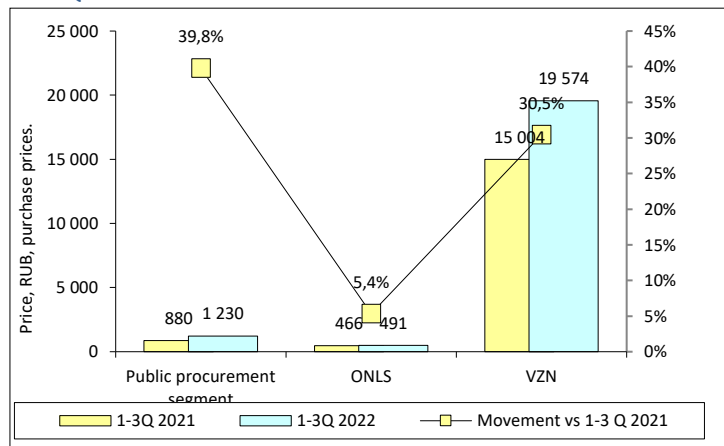


Figure 2. Movement of weighted average purchase prices in 1-3 Q 2021 – 1-3 Q 2022



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

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

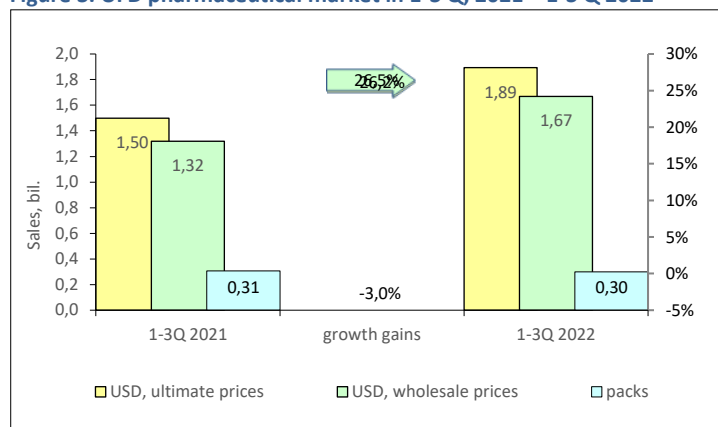


Figure 4. Major segment profile of UFD pharmaceutical market in 1-3 Q, 2021 – 1-3 Q 2022

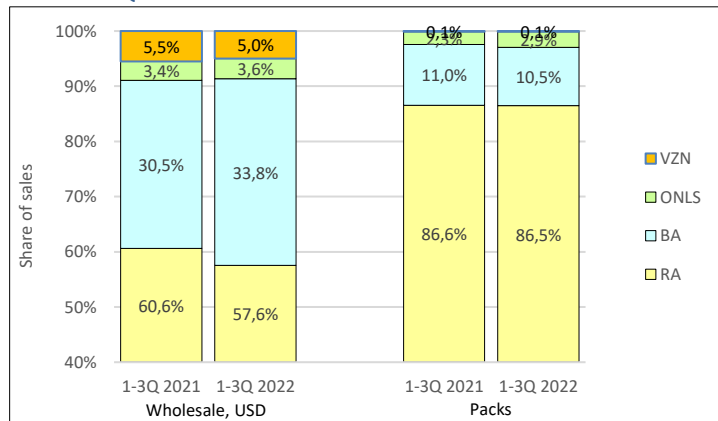


Figure 5. Retail segment profile of UFD pharmaceutical market in 1-3 Q, 2021 – 1-3 Q 2022

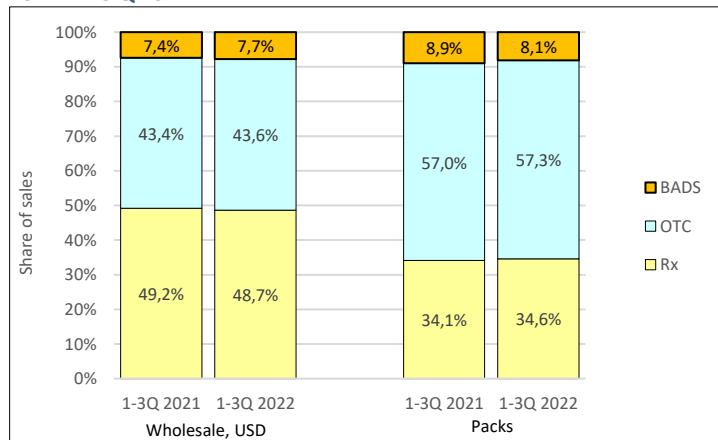
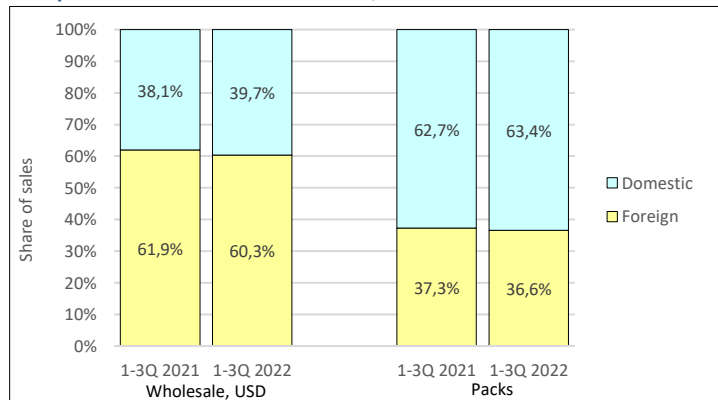


Figure 6. Movement of the Russian/foreign drugs share in the profile of UFD pharmaceutical market in 1-3 Q, 2021 – 1-3 Q 2022



* Here and elsewhere, IQVIA's data are used

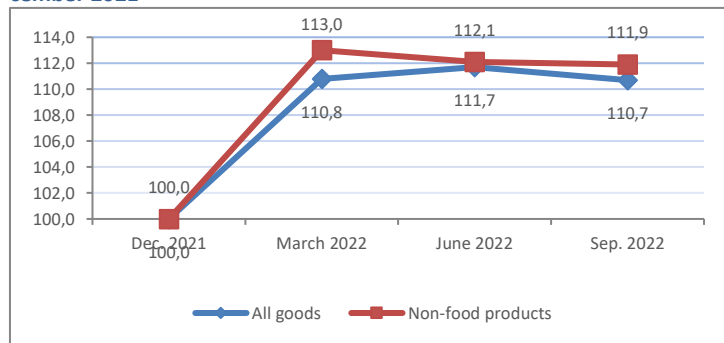
Macroeconomic indices

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

Value	December-September 2022	December-September 2022 (%) vs. December-September 2021
Industrial production index		101.4
Retail turnover, RUB bil.	2,841.5	98.5
Monthly average accrued wage per worker (nominal), RUB	54,005	114.9
Real		99.6

Note: SiFD TOGS data

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



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 2021 – 1-3 Q 2022*

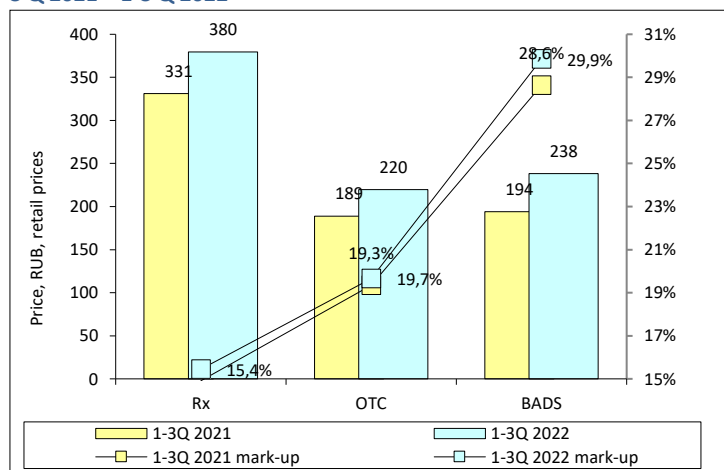
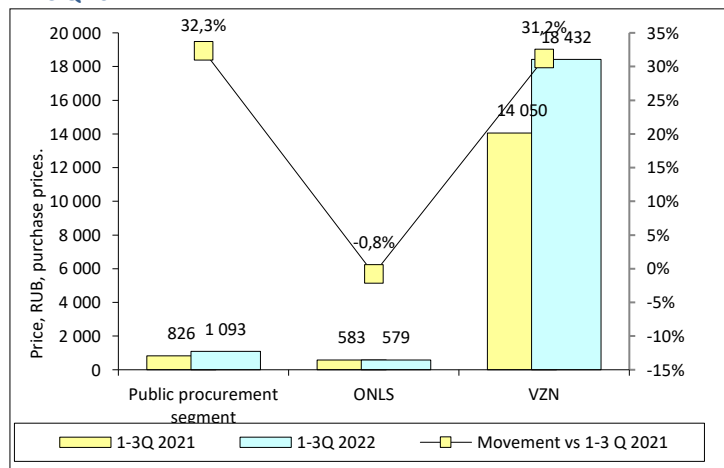


Figure 2. Movement of weighted average purchase prices in 1-3 Q 2021 – 1-3 Q 2022



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

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

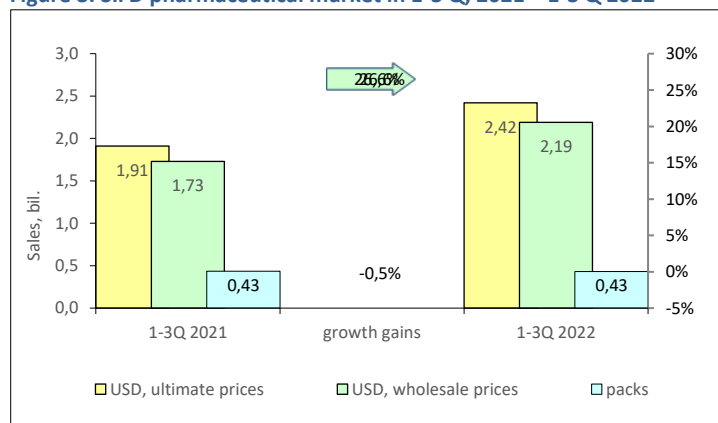


Figure 4. Major segment profile of SiFD pharmaceutical market in 1-3 Q, 2021 – 1-3 Q 2022

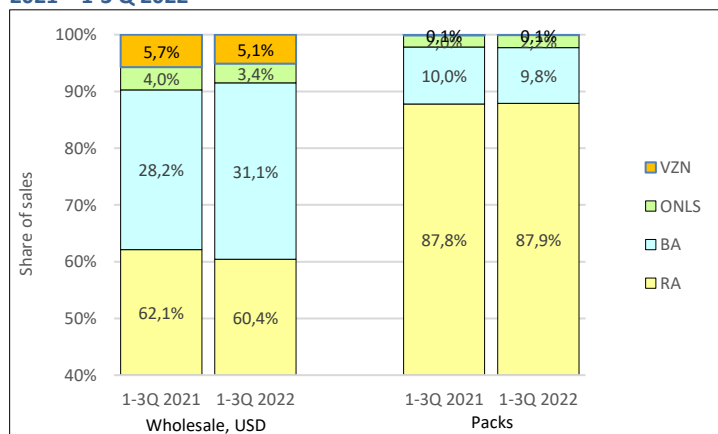


Figure 5. Retail segment profile of SiFD market in 1-3 Q, 2021 – 1-3 Q 2022

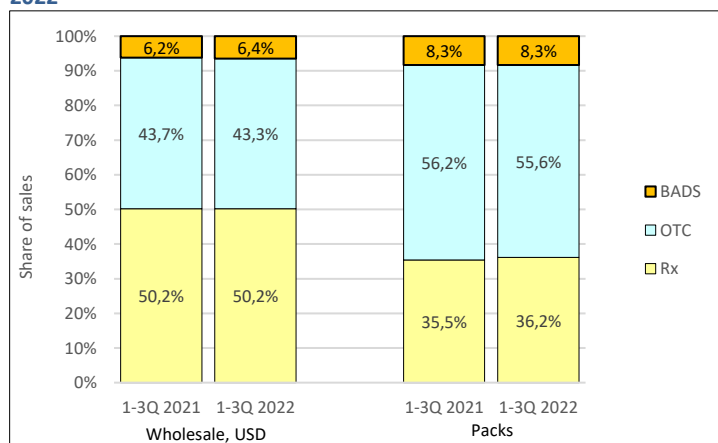
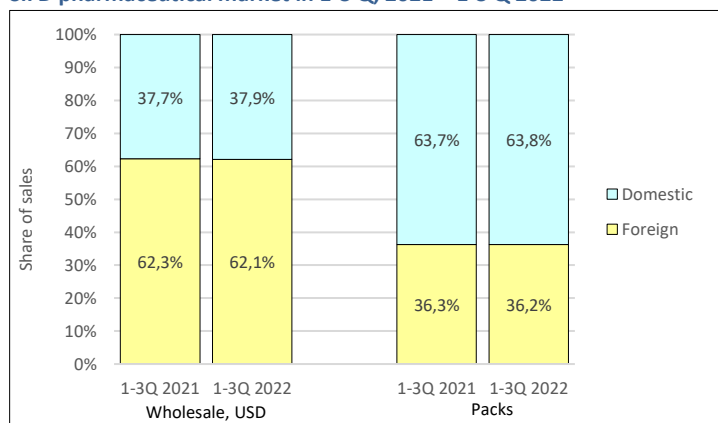


Figure 6. Movement of the Russian/foreign drugs share in the profile of SiFD pharmaceutical market in 1-3 Q, 2021 – 1-3 Q 2022



* Here and elsewhere, IQVIA's data are used

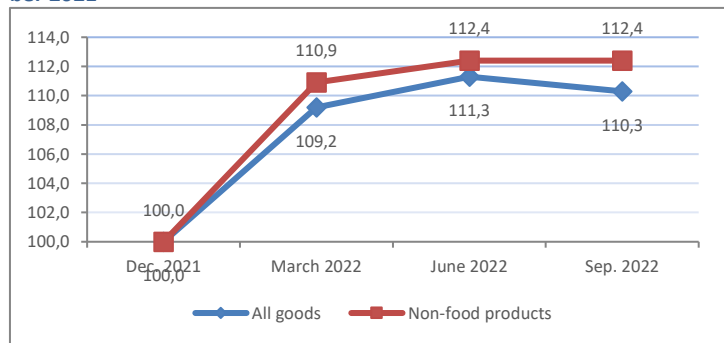
Macroeconomic indices

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

Value	December-September 2022	December-September 2022 (%) vs. December-September 2021
Industrial production index		100.4
Retail turnover, RUB bil.	3,502.8	96.3
Monthly average accrued wage per worker (nominal), RUB	43,424	112.0
Real		98.1

Note: SoFD TOGS data

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



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 2021 – 1-3 Q 2022*

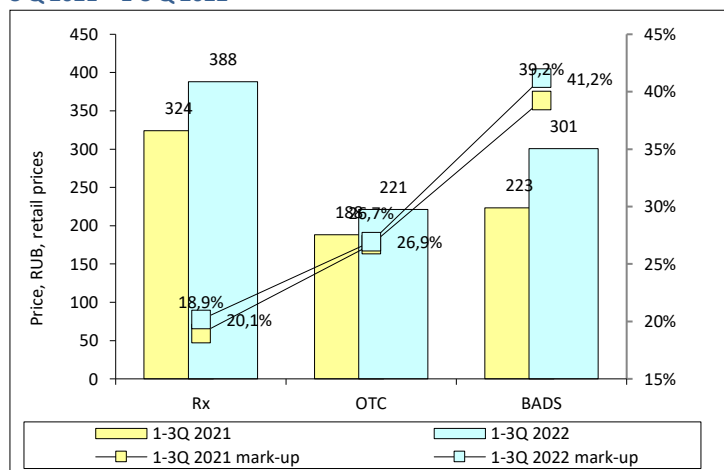
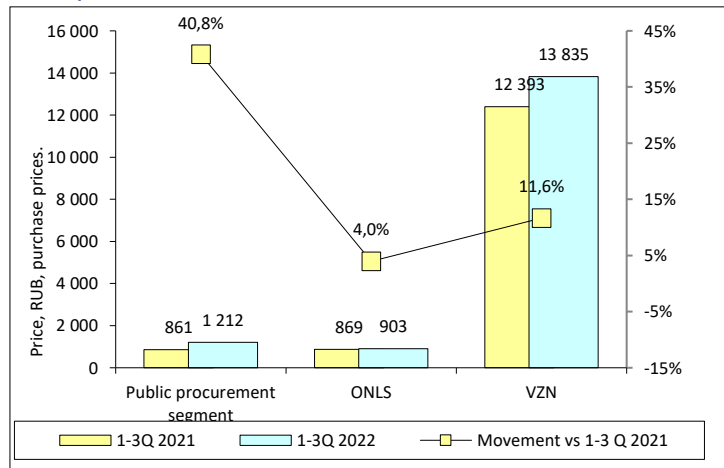


Figure 2. Movement of weighted average purchase prices in 1-3 Q 2021 – 1-3 Q 2022



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

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

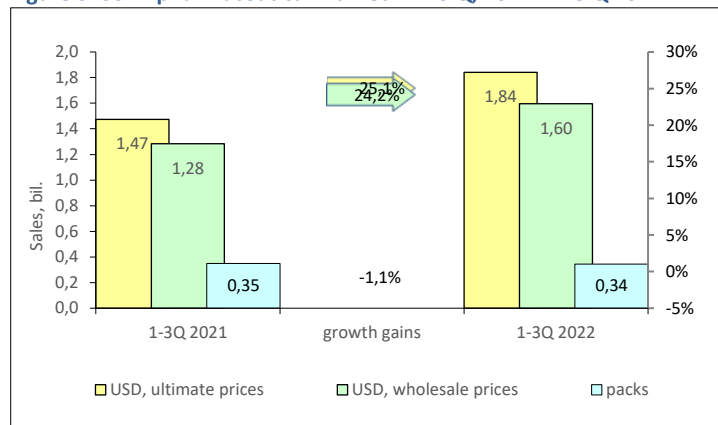


Figure 4. Major segment profile of SoFD pharmaceutical market in 1-3 Q, 2021 – 1-3 Q 2022

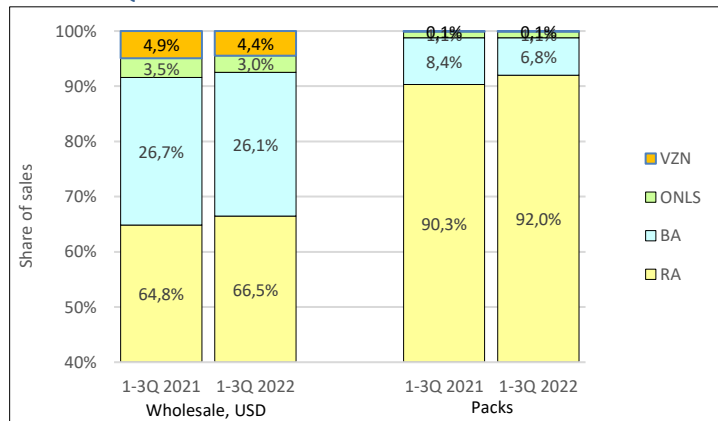


Figure 5. Retail segment profile of SoFD pharmaceutical market in 1-3 Q, 2021 – 1-3 Q 2022

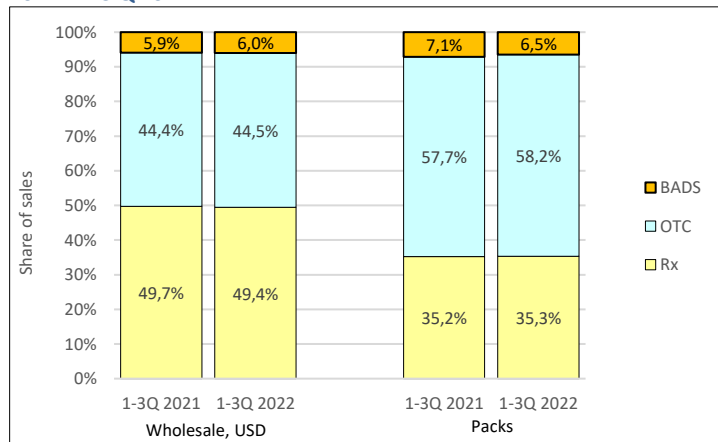
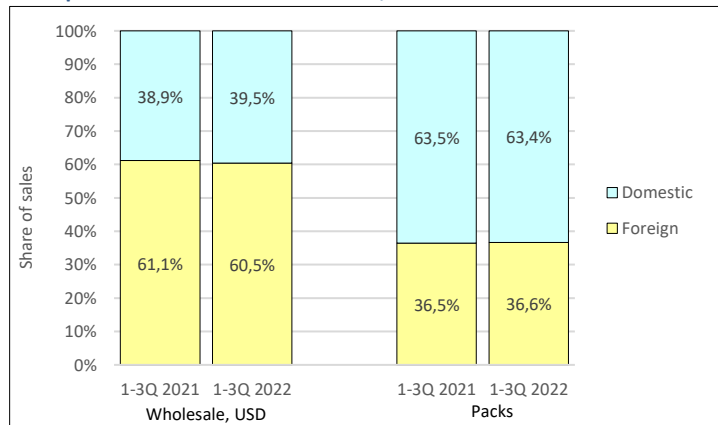


Figure 6. Movement of the Russian/foreign drugs share in the profile of SoFD pharmaceutical market in 1-3 Q, 2021 – 1-3 Q 2022



* Here and elsewhere IQVIA's data are used

PHARMACEUTICAL MARKET OF THE FAR EASTERN FEDERAL DISTRICT (FEFD) IN 1-3 Q 2022. KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	December-September 2022	December-September 2022 (%) vs. December-September 2021
Industrial production index		95.4
Retail turnover, RUB bil.	1,759.5	99.3
Monthly average accrued wage per worker (nominal), RUB	70,966	111.1
Real		98.5

Note: FEFD TOGS data

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



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 2021 – 1-3 Q 2022*

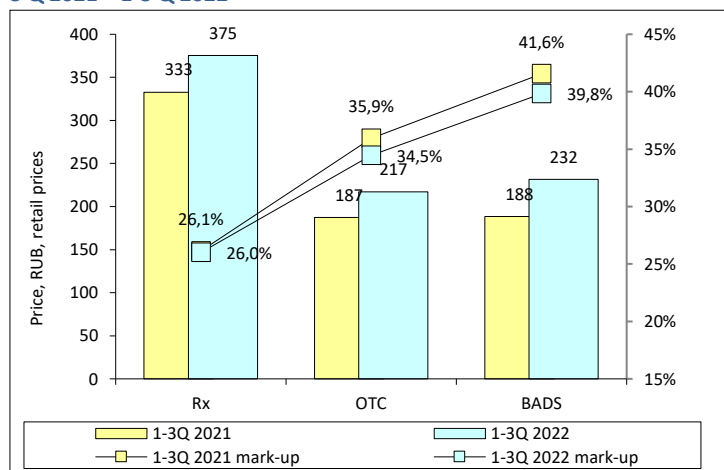
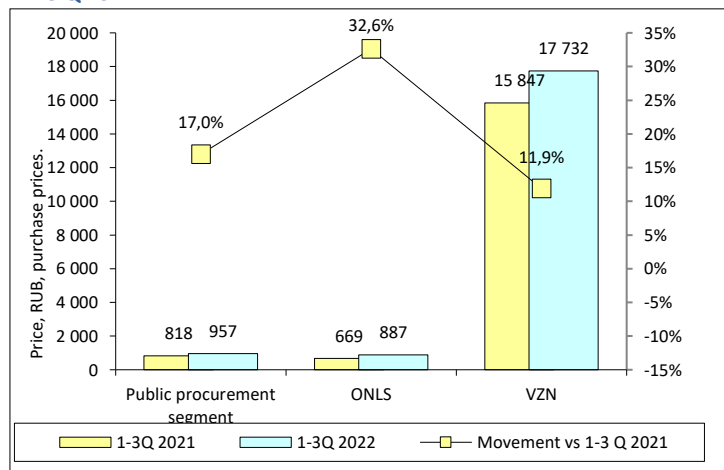


Figure 2. Movement of weighted average purchase prices in 1-3 Q 2021 – 1-3 Q 2022



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

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

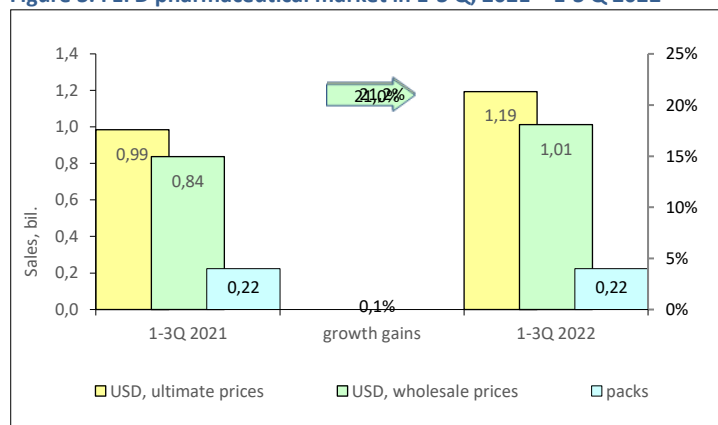


Figure 4. Major segment profile of FEFD pharmaceutical market in 1-3 Q, 2021 – 1-3 Q 2022

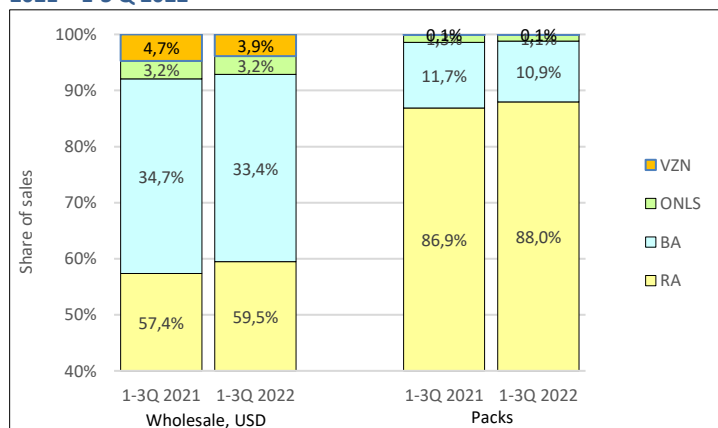


Figure 5. Retail segment profile of FEFD pharmaceutical market in 1-3 Q, 2021 – 1-3 Q 2022

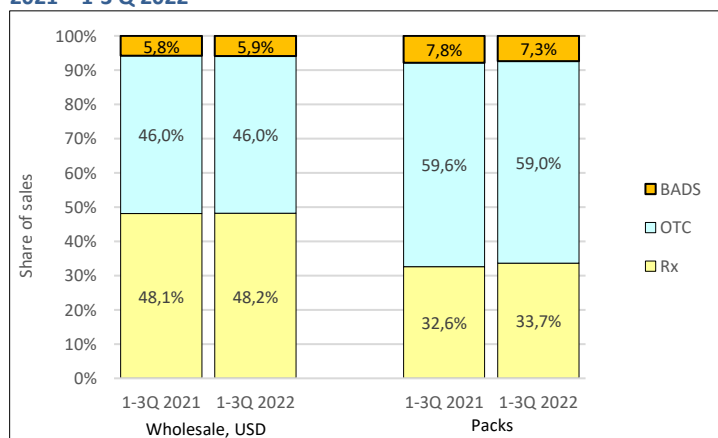
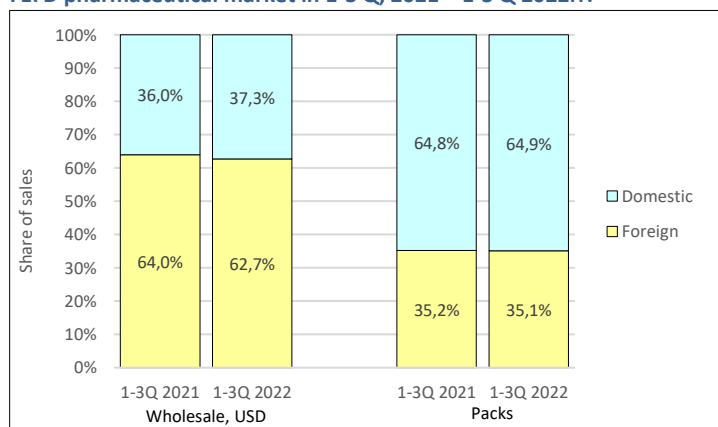


Figure 6. Movement of the Russian/foreign drugs share in the profile of FEFD pharmaceutical market in 1-3 Q, 2021 – 1-3 Q 2022rr.



* Here and elsewhere, IQVIA's data are used