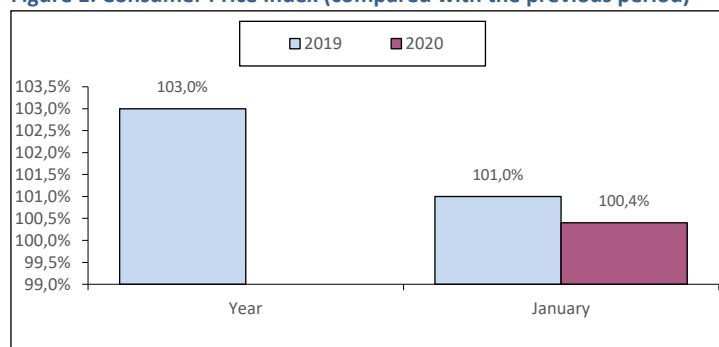


## MACROECONOMIC INDICES

### Inflation

According to Federal State Statistics Service's data, the Consumer Price Index was estimated at 100.4% in January 2020 as compared to the previous month. In January of 2020, Industrial Producer Price Index (for goods intended for sale on the domestic market) was 100.9%, whereas in the month-earlier period it had amounted to 99.6%.

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



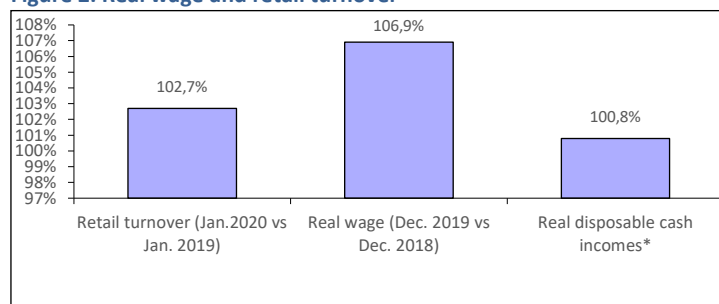
### Living standard

In December of 2019, a gross monthly average wage<sup>1</sup> of corporate employees reached RUB 62,239 (USD 988.86), RUB 47,468 in 2019. It accounted for 110.1% compared to December of 2018, and 134.5% compared to the previous period. In December 2019, the real gross wage accounted for 106.9% as compared to December of 2018, and 134.0% against the prior period, and 102.9% at year-end 2019. According to estimates<sup>2</sup>, in 2019 real disposable cash incomes increased by 0.8% compared to the same period of 2018 (Fig. 2).

### Retail turnover

In January 2020, the retail turnover was equal to RUR 2,632.7 bil. or 102.7% (at comparable prices) as compared to January of the previous year (Fig. 2).

**Figure 2. Real wage and retail turnover**



\* 2019 vs 2018

### Industrial Production

According to Federal State Statistics Service's data, Industrial Production Index accounted for 101.1% in January 2020 compared to the same period in the previous year, and 82.7% compared to December 2019.

According to Federal State Statistics Service's data, Industrial Production Index of drugs and medical products in January 2020 accounted for 101.1% compared to the relevant period of 2019, and 64.3% compared to December of 2019.

### Domestic production

Table 1 provides the top 10 domestic pharmaceutical manufacturers by their sale volumes in all segments of the market based on the results for January 2020.

**Table 1. The top ten Russian chemical and pharmaceutical manufacturers by sales volume in January 2020.**

Rank	Manufacturer	RUB mil.
1	Otcpharm	2011.3
2	Biocad	1566.1
3	Marathon Pharma	1474.2
4	Pharmstandart	1089.6
5	Valenta	1042.0
6	Stada	948.6
7	Generium	834.8
8	Akrihin	791.7
9	Vertex	733.8
10	Sotex	689.1

Source - Remedium according to IQVIA data

Table 2 provides pharmacy sales data from 10 regions of the Russian Federation. Sales (in terms of roubles) increased in almost all regions in December 2019 as compared to the previous month. The highest growth was observed in Tyumen (+26%), the lowest one in Novosibirsk Region (+6%). The sales only decreased in Perm by 4%.

**Table 2. Pharmacy sales in the regions, 2019**

Region	Pharmacy sales, \$ mil. (wholesale prices)			Growth gain, % (roubles)		
	October 2019	November 2019	December 2019	October/September 19	November/October 19	December/November 19
Moscow	185.2	184.3	228.5	-4%	-1%	22%
St. Petersburg	63.1	60.3	73.0	-2%	-5%	19%
Krasnodar Krai	36.7	33.0	40.2	4%	-11%	20%
Krasnoyarsk Krai	28.5	27.2	33.1	3%	-5%	20%
Tatarstan	19.4	16.8	18.8	5%	-14%	10%
Rostov Region	22.0	19.9	24.3	-1%	-10%	20%
Novosibirsk Region	20.1	17.2	18.6	1%	-15%	6%
Voronezh Region	12.6	11.8	14.1	1%	-7%	18%
Perm	7.2	5.9	5.7	-6%	-19%	-4%
Tyumen	6.6	5.1	6.5	6%	-24%	26%

### Advertising

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

**Table 3. Top five advertisers in mass media in January 2020**

Rank	Company*	Quantity of broadcasts
1	GSK Consumer Healthcare	14,088
2	Otcpharm	12,994
3	Sanofi	11,863
4	Berlin-Chemie/Menarini	11,532
5	Sandoz	10,988

Source - Remedium according to Mediascope's data

**Table 4. Top five trade names in mass media in January, 2020**

Rank	Brand*	Quantity of broadcasts
1	Lasolvan	4,396
2	Broncho-munal	3,735
3	Linex	3,249
4	Polyoxidoni	3,158
5	ACC	3,047

Source - Remedium according to Mediascope's data

\* Only products registered with State Register of Medicines were considered.

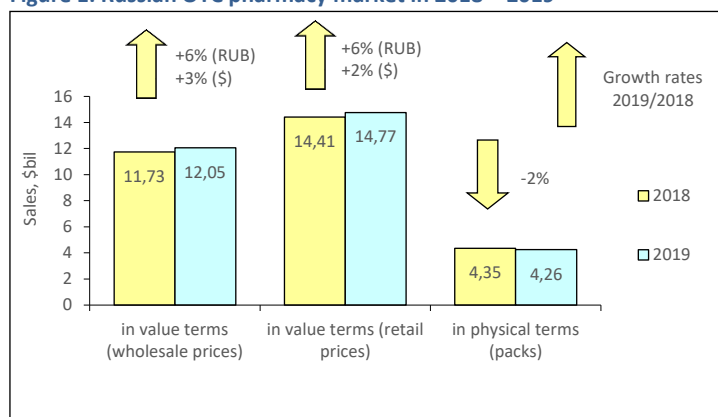
<sup>1</sup> Starting with the report "Information on the socio-economic situation of the Russian Federation" (January-September 2019), the indicators of nominal and real accrued wages of employees of organizations will be published only after receiving reporting data. Preliminary estimates will not be submitted.

<sup>2</sup> 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: RESULTS 2019

According to the results of the Retail Audit of Finished Pharmaceutical Products (FPP) in Russian Federation™, at year-end 2019 of drugs in physical terms in the country saw a 2% decrease to 4.256 bil. packs as compared to 2018. In money terms, the market saw a 6% increase in terms of roubles and 3% in terms of dollars. The volume of the market amounted to RUB 780.047 bil. (USD 12.055 bil.) at wholesale prices (Fig. 1). The average cost of a pack increased as compared to a year earlier (USD 3.31) and reached USD 3.47 at retail prices. At the end of 2019, consumer spending for drugs in Russia averaged to USD 100.62, whereas during the same period a year ago it averaged to USD 98.11.

Figure 1. Russian OTC pharmacy market in 2018 – 2019



At year-end 2019, the top ten manufacturers showed high stability on the Russian pharmacy market – six manufacturers from the top ten held their own in the ranking (Table 1). The manufacturers BAYER (+4%<sup>3</sup>), SANOFI (-1%), TEVA (-0.1%), SERVIER (+4%), OTCPHARM (+0.4%) and SANDOZ (+7%) held their previous top six ranks. One newcomer broke into the top-10 ranking, coming in at the bottom part of the ranking: The most dynamic KRKA (+24%) from the top 10 manufacturers ranking moved up to rank seven from 11. At the same time, three drug manufacturers ABBOTT (+5%), BERLIN-CHEMIE/MENARINI (+8%) и GLAXOSMITHKLINE (+10%) moved down a rank. In total, the top ten manufacturers accumulated 33.3% of the Russian market, whereas in the year– earlier period they accounted for 33.7%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten	2019	2018	Manufacturer*	Share in total pharmacy sales, %	
				2019	2018
1	1		<b>BAYER</b>	4.8	4.9
2	2		<b>SANOFI</b>	4.1	4.4
3	3		<b>TEVA</b>	3.5	3.7
4	4		<b>SERVIER</b>	3.4	3.5
5	5		<b>OTCPHARM</b>	3.1	3.3
6	6		<b>SANDOZ</b>	3.0	3.0
7	11		<b>KRKA</b>	3.0	2.6
8	7		<b>ABBOTT</b>	2.8	2.9
9	8		<b>BERLIN-CHEMIE/MENARINI</b>	2.8	2.8
10	9		<b>GLAXOSMITHKLINE</b>	2.8	2.7
Total				33.3	33.7

\*AIPM members are in bold

XARELTO (+30%) remained the leader among the brands by sales volume and growth rates (Table 2). The markets of the brands NUROFEN (+11%), MEXIDOL (+7%) and CARDIOMAGNYL (+8%) also developed by outstripping rates, which allowed them to move up to ranks two and five, and the latter one to break into the top-10, moving up to rank ten. The brand MIRAMISTIN (+4%) also managed to rise in the rank by two points. At the same time, DETRALEX (+5%) and ACTOVEGIN (-5%), in contrast, lost one rank each and moved down to ranks three and six, respectively. The brands CONCOR (+4%), KAGOCEL (-6%) and CARDIOMAGNYL (-3%) held their previous ranks four, seven and nine. The total share of the top-10 didn't change and accounted for 6.6%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten	2019	2018	Brand	Share in total pharmacy sales, %	
				2019	2018
1	1		XARELTO	1.1	0.9
2	3		NUROFEN	0.8	0.7
3	2		DETRALEX	0.7	0.7
4	4		CONCOR	0.7	0.7
5	6		MEXIDOL	0.6	0.6
6	5		ACTOVEGIN	0.6	0.7
7	7		KAGOCEL	0.5	0.6

<sup>3</sup>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, %	
2019	2018		2019	2018
8	10	MIRAMISTIN	0.5	0.6
9	9	CARDIOMAGNYL	0.5	0.6
10	12	PENTALGIN	0.5	0.5
Total			6.6	6.6

Six of the top ten INNs and group names held their own in the top ten INN and generic names ranking (Table 3). The leading INNs XYLOMETAZOLINE (+3%), IBUPROFEN (+5%) and DIOSMIN\*HESPERIDIN (+7%), as well as BISOPROLOL (+11%), ROSUVASTATIN (+2%) and ETHYLMETHYLHYDROXY-PYRIDINE (+6%) were as before placed at ranks five, eight and ten, respectively. Two INNs rose in the ranks. RIVAROXABAN (+30%) moved up from rank seven to four, and the newcomer DICLOFENAC (+18%) moved up to rank nine of the top ten. Two INNs, PANCREATIN (+9%) and NIMESULIDE (+8%), on the contrary, moved down to the lower ranks six and seven. The total share of the top-ten INNs and grouping names increased from 9.7% to 10%.

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

Rank	2019	2018	INNs/Grouping Names	Share in total pharmacy sales, %	
				2019	2018
1	1		XYLOMETAZOLINE	1.6	1.6
2	2		IBUPROFEN	1.1	1.1
3	3		DIOSMIN*HESPERIDIN	1.1	1.1
4	7		RIVAROXABAN	1.1	0.9
5	5		BISOPROLOL	1.0	1.0
6	4		PANCREATIN	1.0	1.0
7	6		NIMESULIDE	0.9	0.9
8	8		ROSUVASTATIN	0.8	0.8
9	11		DICLOFENAC	0.7	0.7
10	10		ETHYLMETHYLHYDROXYPYRIDINE	0.7	0.7
Total				10.0	9.7

In contrast to the above rankings, the top ten ATC-groups ranking changed its leader: The most dynamic group C09 Agents acting on the rennin-angiotensin system (+21%) moved up to rank one from two (Table 4). At the same time, it displaced the former leader M01 Anti-inflammatory and antirheumatic products (+9%) down a rank, despite the outstripping growth rates and expansion of the market share. B1 Antithrombotic agents (+13%) ranked 3rd by sales, moving up to that rank from number five. R05 Cough and cold preparations (+4%) also moved up two ranks, coming in at number eight. The only newcomer C05 Vasoprotectors (+5%) moved up to the last rank of the top ten ranking. On the contrary, the groups G03 Sex hormones (+4%) and J05 Antivirals for systemic use (-4%) fell in the ranks, moving down to numbers five and nine. R01 Nasal preparations and J01 Antibacterials for systemic use (+5% each), as well as N02 Analgesics (+3%) held their previous ranks four, six and seven. In total, the top ten ATC groups accumulated 36.4%, whereas the year-earlier period they accounted for 36.2%.

Table 4. The top ten ATC Groups by pharmacy sales

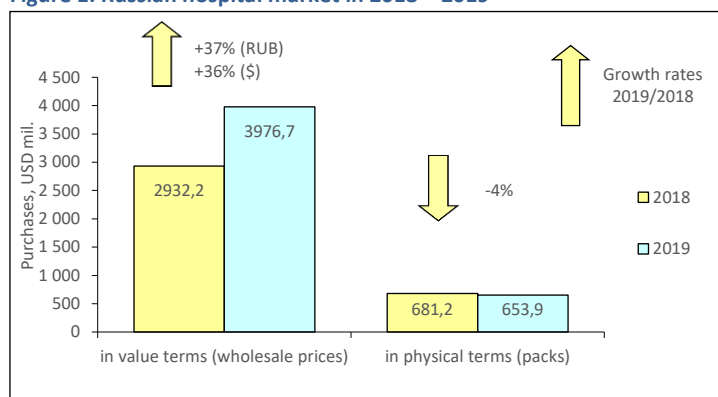
Rank	2019	2018	ATC code	ATC group	Share in total pharmacy sales, %	
					2019	2018
1	2		C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.2	4.6
2	1		M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.0	4.8
3	5		B01	ANTITHROMBOTIC AGENTS	3.8	3.5
4	4		R01	NASAL PREPARATIONS	3.7	3.7
5	3		G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.7	3.8
6	6		J01	ANTIBACTERIALS FOR SYST USE	3.4	3.5
7	7		N02	ANALGESICS	3.1	3.2
8	10		R05	COUGH AND COLD PREPARATIONS	2.9	3.0
9	8		J05	ANTIVIRALS FOR SYSTEMIC USE	2.9	3.2
10	11		C05	VASOPROTECTIVES	2.8	2.9
Total					36.4	36.2

**Conclusion.** Based on the results for 2019, the retail pharmacy market of the country brought in RUB 955.640 bil. (USD 14.769 bil.), which is 6% more in terms of rubles and 2% in terms of dollars compared to 2018 indicators. In pack terms, the market reduced by 2% compared to the previous year and amounted to 4.256 bil. packs. In 2019, the average cost of an FPP pack in the national pharmacies was USD 3.47, whereas in the year-earlier period it was USD 3.31. The average expenses of the Russian Federation residents for purchase of OTC drugs in pharmacies increased as compared to the previous year (USD 100.62 vs. USD 98.11).

## RUSSIAN FEDERATION HOSPITAL MARKET: RESULTS 2019

According to the results of the Budget Audit of FPPs in the Russian Federation (without DLO and regional subsidized drug list)<sup>TM</sup>, based on the results for 2019 the national hospital market reduced by 6% in physical terms and amounted to 653.914 mil. packs. In value terms, the market showed a 37% increase in terms of roubles and 36% in terms of dollars and reached RUB 256.235 bil. (USD 3.977 bil.) at wholesale prices. Based on the results for 2019, the average cost of an FPP pack in the hospital sector of the Russian Federation was USD 6.08, whereas in the year-earlier period its cost was USD 4.30.

**Figure 1. Russian hospital market in 2018 – 2019**



The Russia-based manufacturer BIOCAD, which purchases increased by 95%, became the leader of the Russian hospital market based on the results for 2019 (Table 1). The manufacturers MSD (2.2-fold growth) and ROCHE (3.7-fold growth) showed two-fold and almost four-fold growth in purchases, moving up to ranks two and three. Note that the latter became one of the two newcomers of the top ten rating. BRISTOL MYERS SQU (4.8-fold growth), which moved up to rank 28 from nine, became the second newcomer of the top ten ranking. The markets of the other two manufacturers developed at a fast pace. SANOFI (+72%) moved up two ranks, coming in at number six, and NOVARTIS (+84%) held its previous rank ten. The less dynamic PFIZER (+25%), PHARMASYNTEZ (+15%) and MICROGEN (+12%), as well as ABBVIE (-7%), which reduced its sales, moved down to the lower ranks four, five, seven and eight, respectively. The total share of the top ten INN and group names ranking increased by 7.5 p.p. and achieved 42.3%.

**Table 1. The top 10 drug manufacturers by hospital purchases**

Rank in the top ten		Manufacturer*	Share in total hospital purchases, %	
2019	2018		2019	2018
1	3	BIOCAD RF	6.6	4.7
2	6	MSD	5.7	3.6
3	13	ROCHE	4.8	1.8
4	1	PFIZER	4.4	4.8
5	4	PHARMASYNTEZ	3.9	4.6
6	8	SANOFI	3.7	2.9
7	5	MICROGEN	3.6	4.4
8	2	ABBVIE	3.3	4.8
9	28	BRISTOL MYERS SQU	3.1	0.9
10	10	NOVARTIS	3.1	2.3
Total			42.3	34.8

\*AIPM members are in bold

SOVIGRIPP (+16%) held its previous rank number one in the top ten brands ranking, though its market share reduced due to lagging behind growth rates (Table 2). However, it should be noted that most brands of the top ten, in contrast, showed high growth rates. Among them was the newcomer of the top ten OPDIVO (7.5-growth in purchases), KEYTRUDA (10-fold growth), PERJETA (6.6-fold growth) and PENTAXIM (2.6-fold growth), which moved up to ranks two, three, eight and nine, respectively. The brands AVEGRA (3-fold) and HERTICAD (2.3-fold growth) also showed manifold volume growth, which allowed the former to move two ranks up, coming in at number five, and the latter held its previous rank six. At the same time, the less dynamic brands PREVENAR 13 (+9%) and NATRIUM CHLORIDUM (+1%), and KALETRA (-21%), which showed negative growth rates, moved down to ranks four, seven and ten, respectively. The total share of the top 10 brands expanded by 5.5 p.p. to 20.5%.

**Table 2. The top 10 brands by hospital purchases**

Rank in the top ten		Brand	Share in total hospital purchases, %	
2019	2018		2019	2018
1	1	SOVIGRIPP	2.6	3.0
2	24	OPDIVO	2.5	0.5
3	36	KEYTRUDA	2.4	0.3
4	2	PREVENAR 13	2.3	2.8
5	8	AVEGRA BIOCAD	2.2	1.0
6	6	HERTICAD	2.1	1.3
7	4	NATRIUM CHLORIDUM	1.8	2.5

Rank in the top ten		Brand	Share in total hospital purchases, %	
2019	2018		2019	2018
8	35	PERJETA	1.6	0.3
9	11	PENTAXIM	1.5	0.8
10	3	KALETRA	1.5	2.5
Total			20.5	15.0

VACCINE, INFLUENZA (+49%) and VACCINE, PNEUMOCOCCAL (+16%) continued to take a lead in the top ten INNs and grouping names ranking (Table 3). Some shifts took place in the lower part of the top ten ranking, as a result of which six brands rose in the ranks. TRASTUZUMAB (2.3-fold growth in purchases) moved up to rank three from five, and BEVACIZUMAB moved up to rank six from seven (3.1-fold growth). The newcomers NIVOLUMAB (7.5-fold growth), PEMBROLIZUMAB (10.1-fold growth) PERTUZUMAB (6.6-fold growth) and VACCINE, ACEL.PERT.DIP.TET. POLIO & HIB (2.6-fold growth) broke into the top ten ranking, coming in at numbers four, five and two bottom ranks. And only the composition INNs LOPINAVIR\*RITONAVIR (-1%) and INN SODIUM (+1%) moved down to the lower ranks seven and eight, respectively. The total share accumulated by the top-ten INNs and grouping names increased from 16.7% to 23.7%.

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

Rank		INNs/Grouping Names	Share in total hospital purchases, %	
2019	2018		2019	2018
1	1	VACCINE, INFLUENZA	4.4	4.0
2	2	VACCINE, PNEUMOCOCCAL	2.6	3.1
3	5	TRASTUZUMAB	2.6	1.5
4	32	NIVOLUMAB	2.5	0.5
5	40	PEMBROLIZUMAB	2.4	0.3
6	7	BEVACIZUMAB	2.4	1.0
7	3	LOPINAVIR*RITONAVIR	1.9	2.6
8	4	SODIUM	1.8	2.5
9	39	PERTUZUMAB	1.6	0.3
10	17	VACCINE, ACEL.PERT.DIP.TET. POLIO & HIB	1.5	0.8
Total			23.7	16.7

Half of the top-10 ATC groups managed to retain their previous positions (Table 4). Among them is the leading group L01 Antineoplastic drugs, which enhanced its standing due to 2.6-fold growth in purchases. J01 Antibacterials for systemic use (+8%), B05 Blood substitutes and perfusion solutions (+5%), B01 Antithrombotic agents (+7%) and V08 Contrast media (+13%) held previous ranks from three through seven, respectively. Two from other ATC groups rose in the ranks. J07 Vaccines (+39%) moved up one rank, coming in at number two, whereas L02 Endocrine therapy, which increased their purchases by 2.9 times moved up from rank 22 to eight. At the same time, they displaced J05 Antivirals for systemic use (+19%), L04 Immunosuppressants (+9%) and J04 Antimycobacterials (+5%) down one rank. In total, the top ten ATC groups accumulated 76.5% of the hospital market, whereas in the year-earlier period - 67.3%.

**Table 4. The top ten ATC groups by hospital purchases**

Rank		ATC code	ATC group	Share in total hospital purchases, %	
2019	2018			2019	2018
1	1	L01	ANTINEOPLASTIC AGENTS	31.2	16.2
2	3	J07	VACCINES	11.7	11.5
3	2	J05	ANTIVIRALS FOR SYSTEMIC USE	11.0	12.6
4	4	J01	ANTIBACTERIALS FOR SYST USE	6.1	7.7
5	5	B05	PLASMA SUBSTITUTES AND PERFUSION SOLUTIONS	4.6	5.9
6	6	B01	ANTITHROMBOTIC AGENTS	3.5	4.5
7	7	V08	CONTRAST MEDIA	2.3	2.8
8	22	L02	ENDOCRINE THERAPY	2.3	1.1
9	8	L04	IMMUNOSUPPRESSANTS	2.1	2.6
10	9	J04	ANTIMYCOBACTERIALS	1.8	2.4
Total				76.5	67.3

**Conclusion.** At the end of 2019, the Russian hospital market showed high positive growth rates both in rouble terms (+37%) and in dollar terms (+36%) and brought in RUB 256.235 bil. (USD 3.977 bil.). In pack terms, the market reduced by 4% and amounted to 653.914 mil. packs. At the end of 2019, the average cost of a finished pharma product (FPP) pack in the national hospital sector amounted to USD 6.08 vs. USD 4.30 in 2018.

**PHARMACEUTICAL MARKET OF THE CENTRAL FEDERAL DISTRICT (CFD) IN 1-4 QUARTER OF 2019 KEY PERFORMANCE INDICATORS**

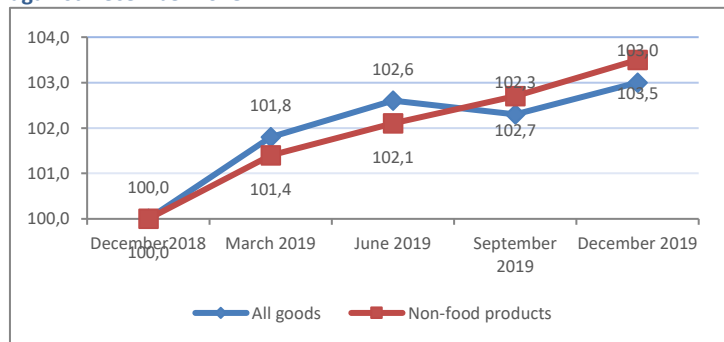
**Macroeconomic indices**

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

Value	December-January 2019	December-January 2019 (%) vs. December-January 2018
Industrial production index		107.5
Retail turnover, RUB bil.	11,669.9	102.2
Monthly average accrued wage per one worker (nominal), RUB	60,480	108.5
real		103.7

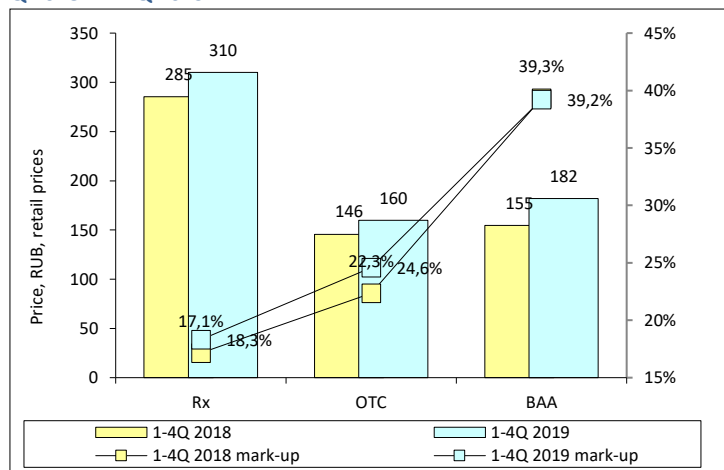
Note: CFD TOGS data

**Figure 1. Dynamics of price index and price index for non-food products against December 2018**

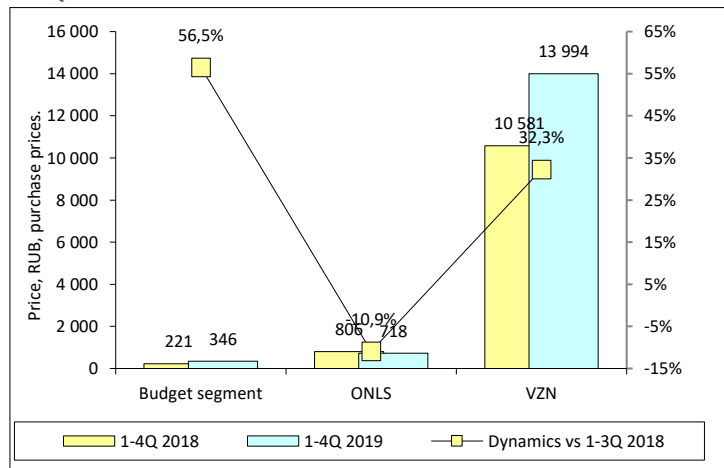


**Indicators of price dynamics and retail margins**

**Figure 1. Dynamics of weighted average prices and retail margins in 1-4 Q 2018 - 1-4 Q 2019**

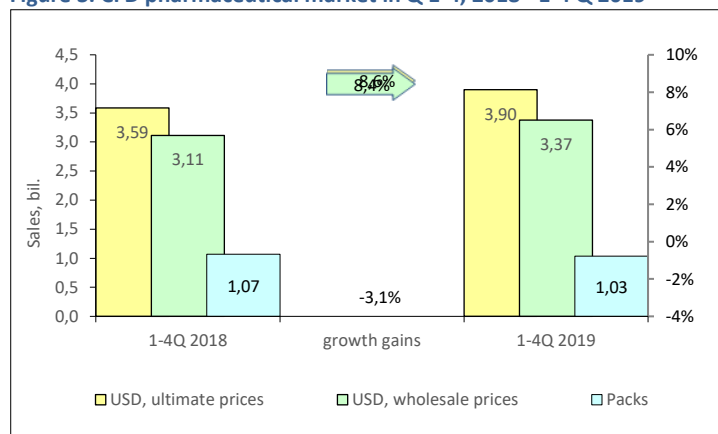


**Figure 2. Dynamics of weighted average purchase prices in 1-4 Q 2018 - 1-4 Q 2019**

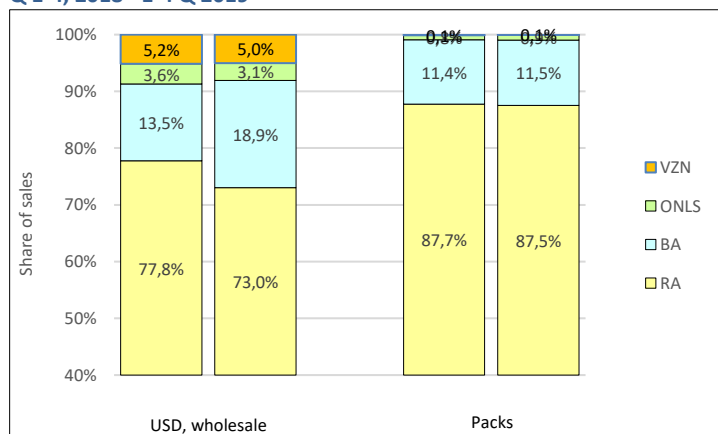


**Indicators of the dynamics and structure of the market<sup>4</sup>**

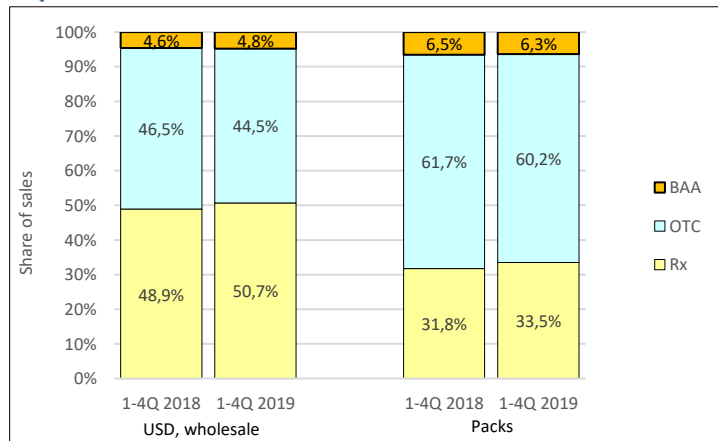
**Figure 3. CFD pharmaceutical market in Q 1-4, 2018 - 1-4 Q 2019**



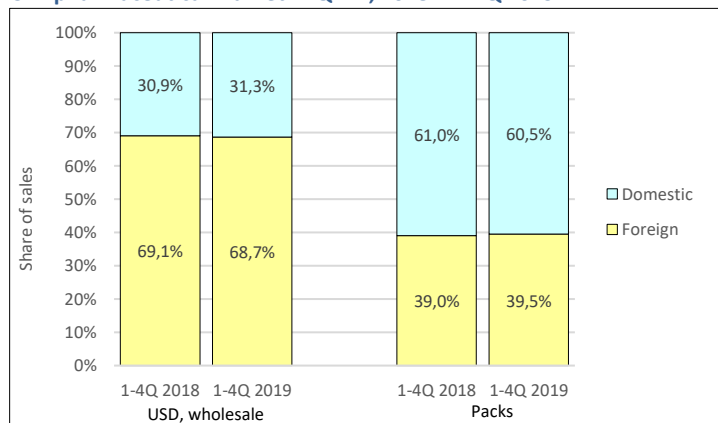
**Figure 4. Structure of CFD pharmaceutical market by major segments in Q 1-4, 2018 - 1-4 Q 2019**



**Figure 5. Structure of the retail segment of CFD market in Q 1-4, 2018 - 1-4 Q 2019**



**Figure 6. Dynamics of the Russian/ foreign drugs share in the structure of CFD pharmaceutical market in Q 1-4, 2018 - 1-4 Q 2019**



<sup>4</sup> Exclusive of Moscow



**PHARMACEUTICAL MARKET OF THE NORTH-WESTERN FEDERAL DISTRICT (NWFD) IN 1-4 Q, 2019 KEY PERFORMANCE INDICATORS**

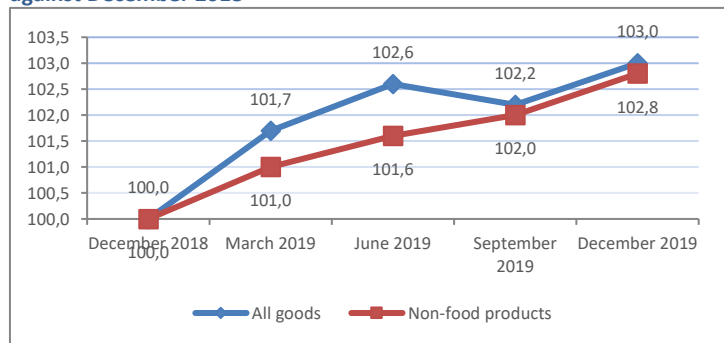
**Macroeconomic indices**

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

Value	December-January 2019	December-January 2019 (%) vs. December-January 2018
Industrial production index		105.9
Retail turnover, RUB bil.	3,280.7	101.3
Monthly average accrued wage per one worker (nominal), RUB	52,649	105.3
real		100.9

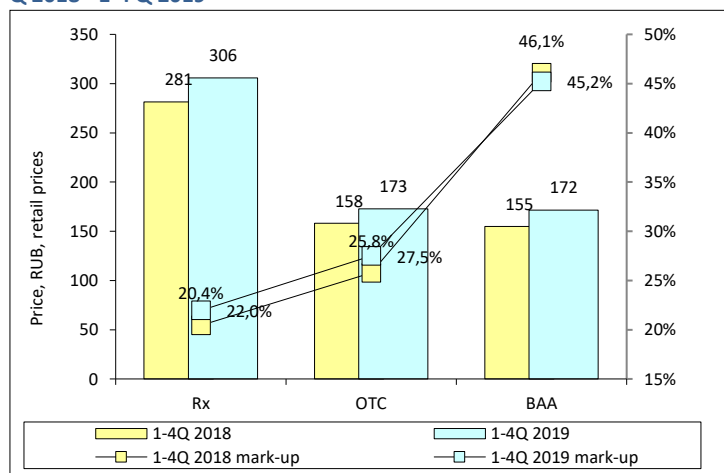
Note: NWFD TOGS data

**Figure 1. Dynamics of price index and price index for non-food products against December 2018**

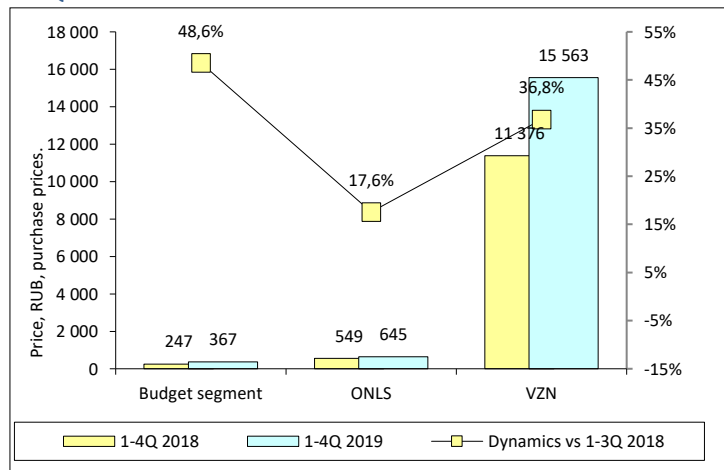


**Indicators of price dynamics and retail margins**

**Figure 1. Dynamics of weighted average prices and retail margins in 1-4 Q 2018 - 1-4 Q 2019**

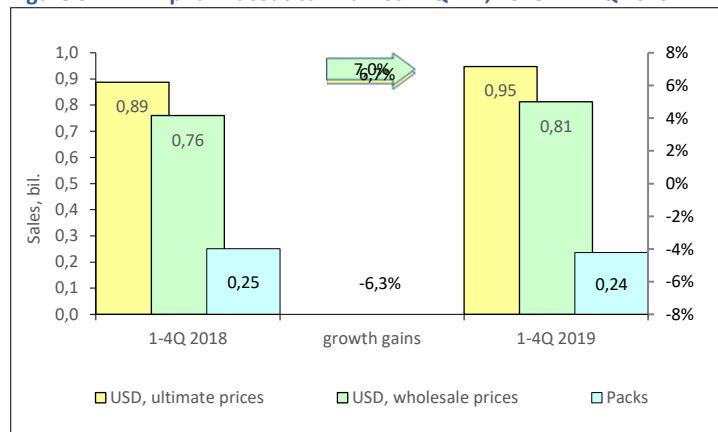


**Figure 2. Dynamics of weighted average purchase prices in 1-4 Q 2018 - 1-4 Q 2019**

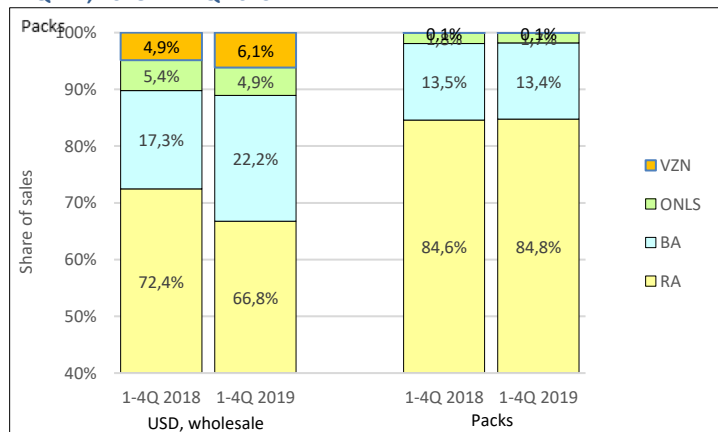


**Indicators of the dynamics and structure of the market<sup>5</sup>**

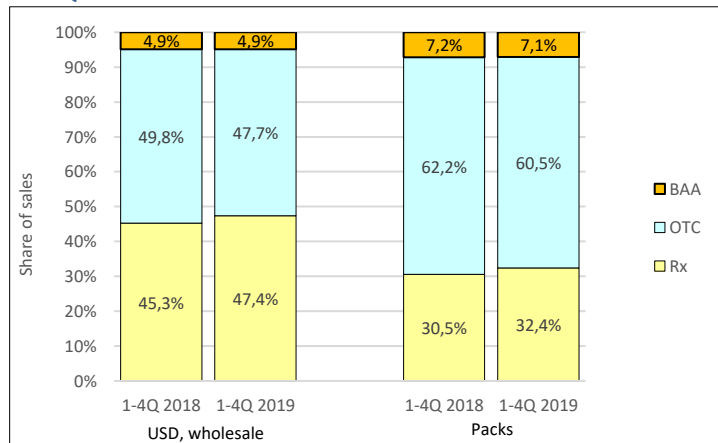
**Figure 3. NWFD pharmaceutical market in Q 1-4, 2018 - 1-4 Q 2019**



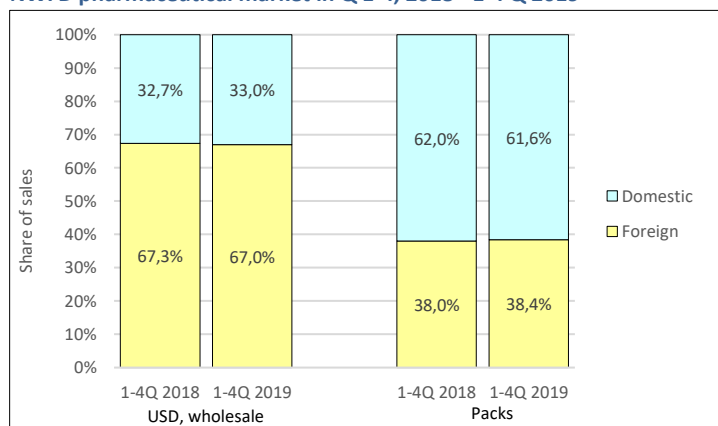
**Figure 4. Structure of NWFD pharmaceutical market by major segments in Q 1-4, 2018 - 1-4 Q 2019**



**Figure 5. Structure of the retail segment of NWFD market in Q 1-4, 2018 - 1-4 Q 2019**



**Figure 6. Dynamics of the Russian/ foreign drugs share in the structure of NWFD pharmaceutical market in Q 1-4, 2018 - 1-4 Q 2019**



<sup>5</sup> Exclusive of St. Petersburg

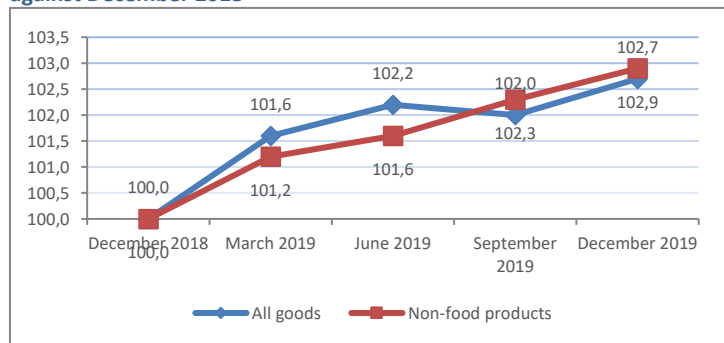
Macroeconomic indices

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

Value	December-January 2019	December-January 2019 (%) vs. December-January 2018
Industrial production index		103.0
Retail turnover, RUB bil.	5,836.5	101.1
Monthly average accrued wage per one worker (nominal), RUB	34,395	106.9
real		102.6

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 1-4 Q 2018 - 1-4 Q 2019

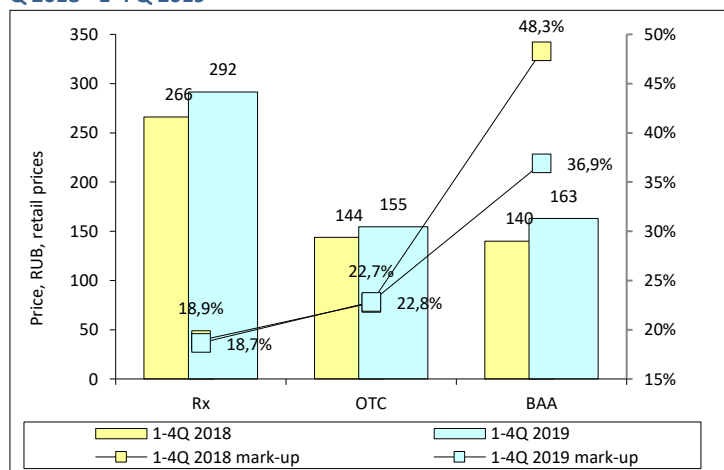
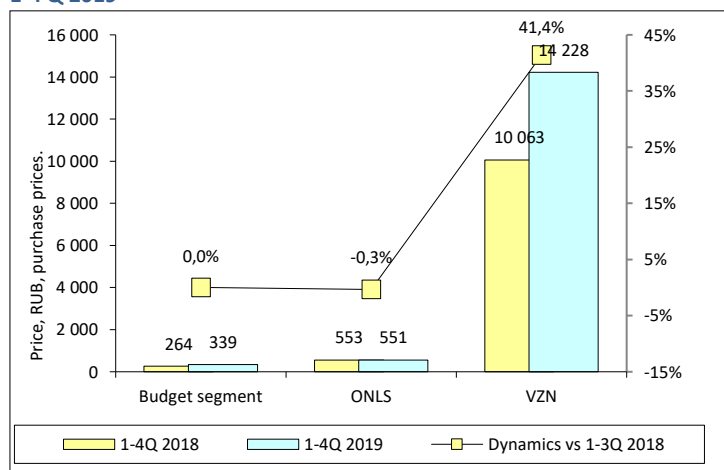


Figure 2. Dynamics of weighted average purchase prices in 1-4 Q 2018 - 1-4 Q 2019



Indicators of the dynamics and structure of the market

Figure 3. VFD pharmaceutical market in Q 1-4, 2018 - 1-4 Q 2019

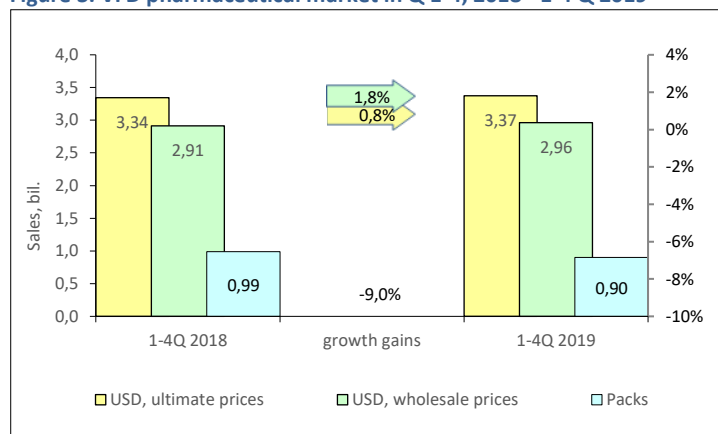


Figure 4. Structure of PFD pharmaceutical market by major segments in Q 1-4, 2018 - 1-4 Q 2019

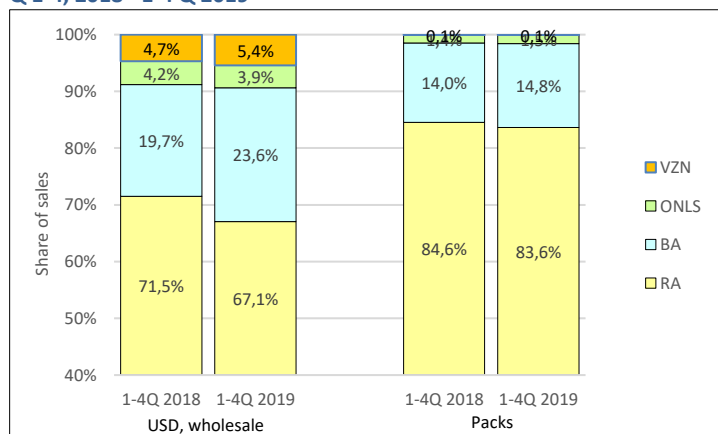


Figure 5. Structure of the retail segment of VFD market in Q 1-4, 2018 - 1-4 Q 2019

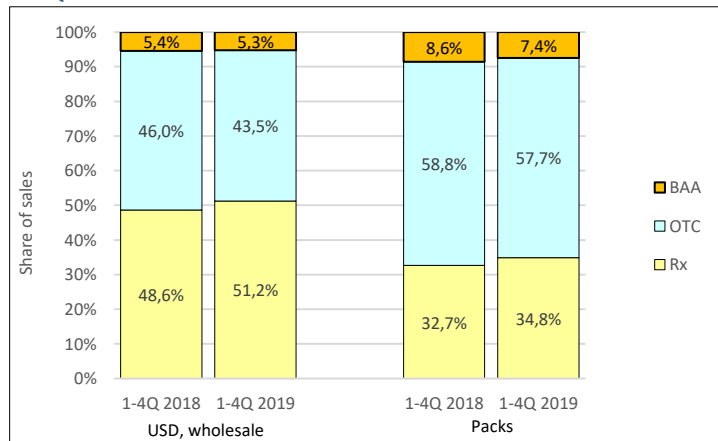
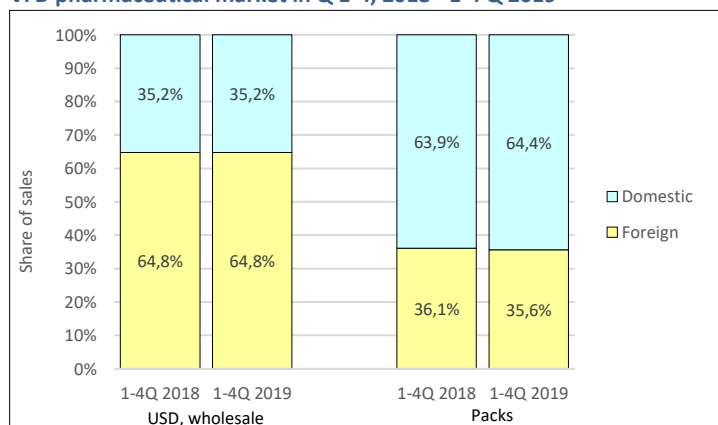


Figure 6. Dynamics of the Russian/foreign drugs share in the structure of VFD pharmaceutical market in Q 1-4, 2018 - 1-4 Q 2019



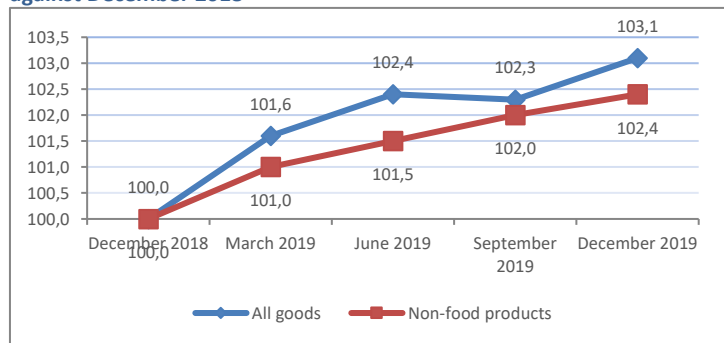
Macroeconomic indices

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

Value	December-January 2019	December-January 2019 (%) vs. December-January 2018
Industrial production index		104.2
Retail turnover, RUB bil.	2,841.5	101.2
Monthly average accrued wage per one worker (nominal), RUB	50,788	105.8
real		101.9

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 1-4 Q 2018 - 1-4 Q 2019

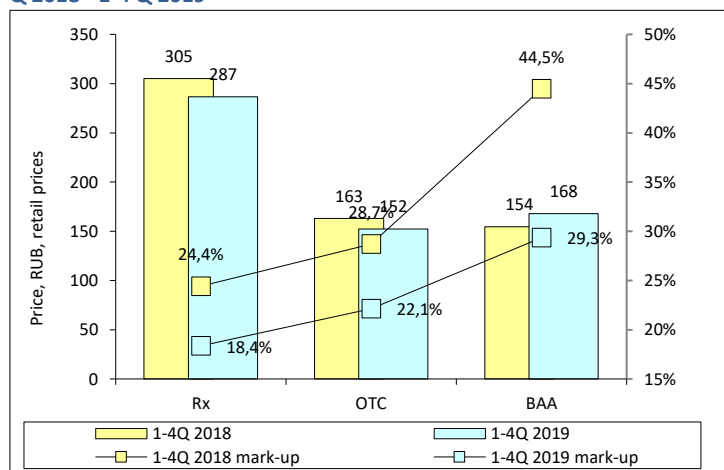
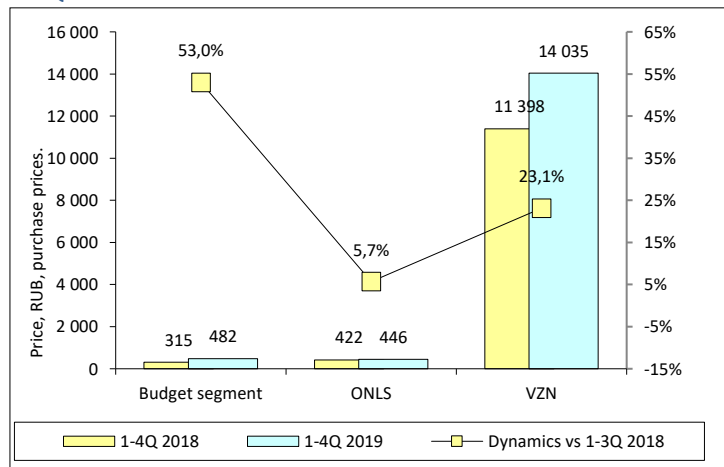


Figure 2. Dynamics of weighted average purchase prices in 1-4 Q 2018 - 1-4 Q 2019



Indicators of the dynamics and structure of the market

Figure 3. UrFD pharmaceutical market in Q 1-4, 2018 - 1-4 Q 2019

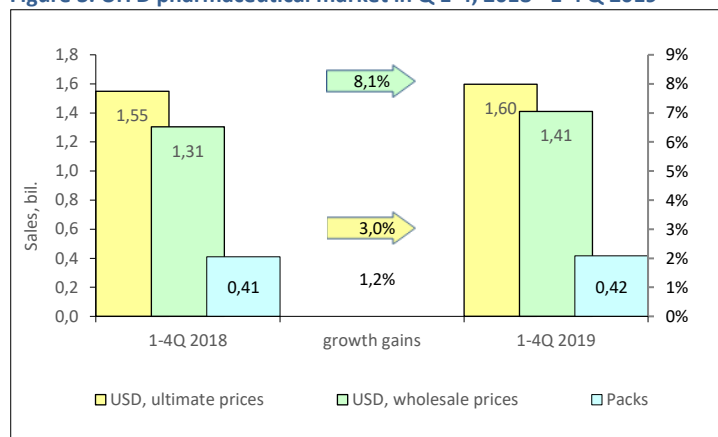


Figure 4. Structure of UrFD pharmaceutical market by major segments in Q 1-4, 2018 - 1-4 Q 2019

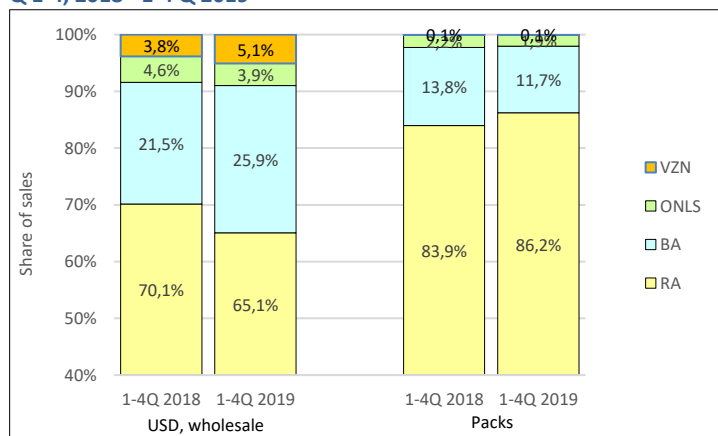


Figure 5. Structure of the retail segment of UrFD market in Q 1-4, 2018 - 1-4 Q 2019

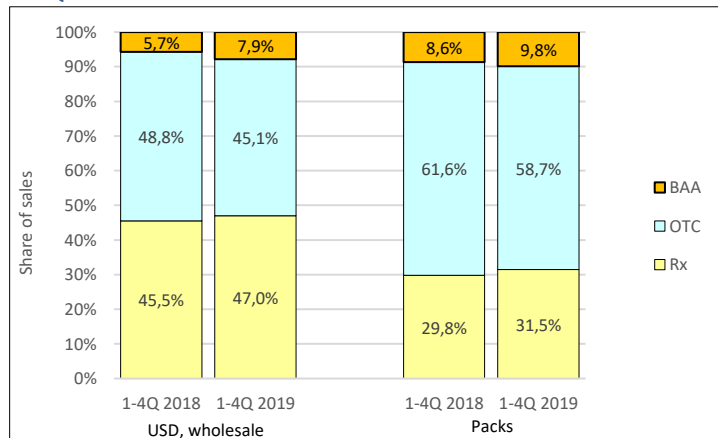
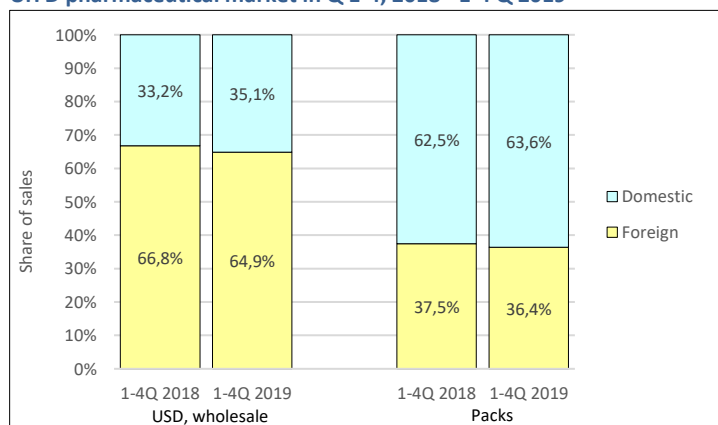


Figure 6. Dynamics of the Russian/ foreign drugs share in the structure of UrFD pharmaceutical market in Q 1-4, 2018 - 1-4 Q 2019



**PHARMACEUTICAL MARKET OF THE SIBERIA FEDERAL DISTRICT (SFD) IN 1-4 Q OF 2019 KEY PERFORMANCE INDICATORS**

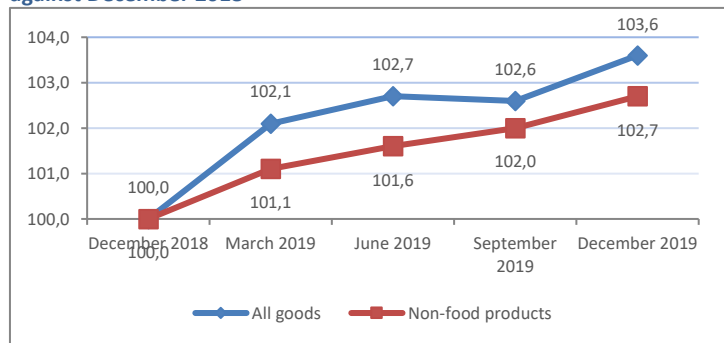
**Macroeconomic indices**

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

Value	December-January 2019	December-January 2019 (%) vs. December-January 2018
Industrial production index		101.4
Retail turnover, RUB bil.	2,927.1	102.2
Monthly average accrued wage per one worker (nominal), RUB	40,880	107.6
real		102.6

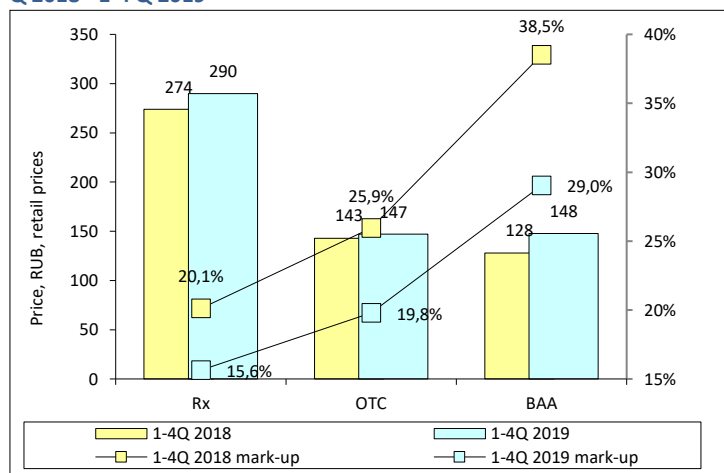
Note: SiFD TOGS data

**Figure 1. Dynamics of price index and price index for non-food products against December 2018**

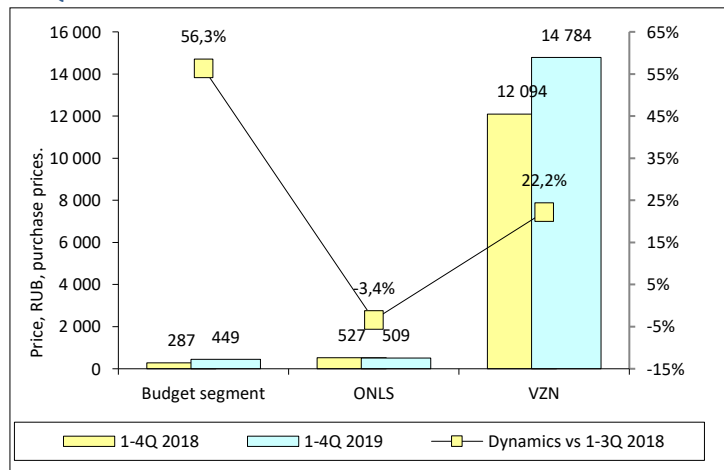


**Indicators of price dynamics and retail margins**

**Figure 1. Dynamics of weighted average prices and retail margins in 1-4 Q 2018 - 1-4 Q 2019**

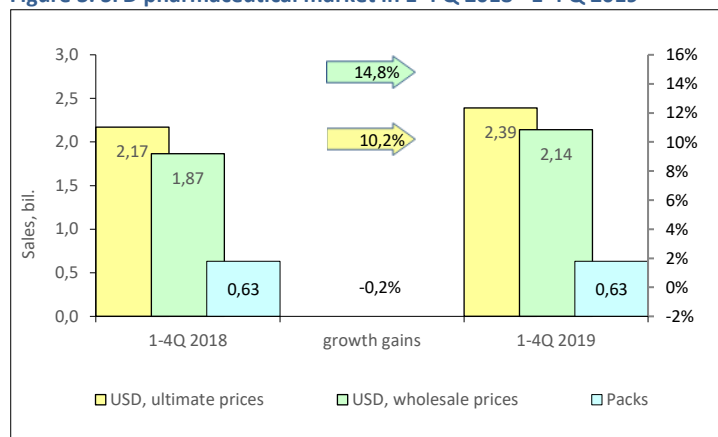


**Figure 2. Dynamics of weighted average purchase prices in 1-4 Q 2018 - 1-4 Q 2019**

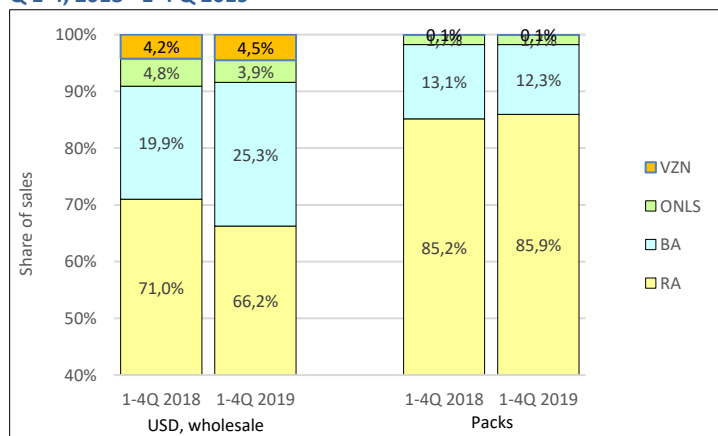


**Indicators of the dynamics and structure of the market**

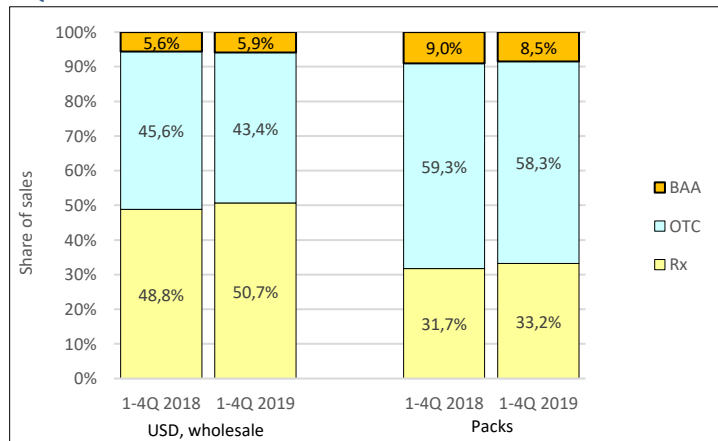
**Figure 3. SFD pharmaceutical market in 1-4 Q 2018 - 1-4 Q 2019**



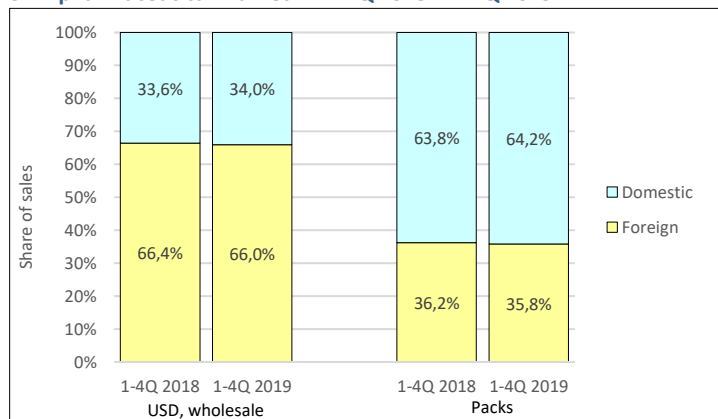
**Figure 4. Structure of SiFD pharmaceutical market by major segments in Q 1-4, 2018 - 1-4 Q 2019**



**Figure 5. Structure of the retail segment of SiFD market in 1-4 Q 2018 - 1-4 Q 2019**



**Figure 6. Dynamics of the Russian/ foreign drugs share in the structure of SiFD pharmaceutical market in 1-4 Q 2018 - 1-4 Q 2019**





**PHARMACEUTICAL MARKET OF THE SOUTHERN FEDERAL DISTRICT (SoFD) IN 1-4 Q OF 2019 KEY PERFORMANCE INDICATORS**

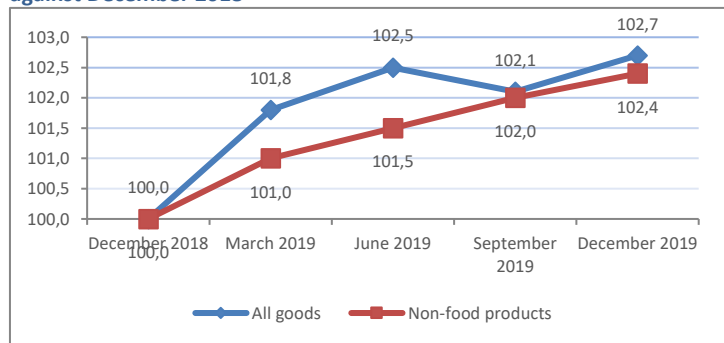
**Macroeconomic indices**

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

Value	December-January 2019	December-January 2019 (%) vs. December-January 2018
Industrial production index		102.9
Retail turnover, RUB bil.	3,486.5	101.7
Monthly average accrued wage per one worker (nominal), RUB	34,268	107.4
real		102.8

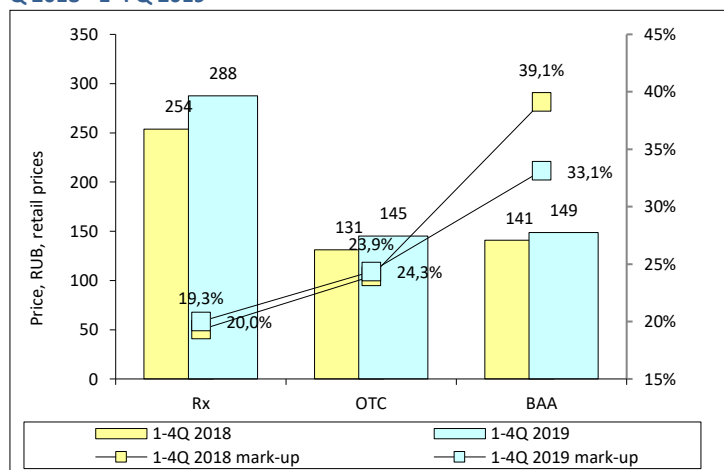
Note: SoFD TOGS data

**Figure 1. Dynamics of price index and price index for non-food products against December 2018**

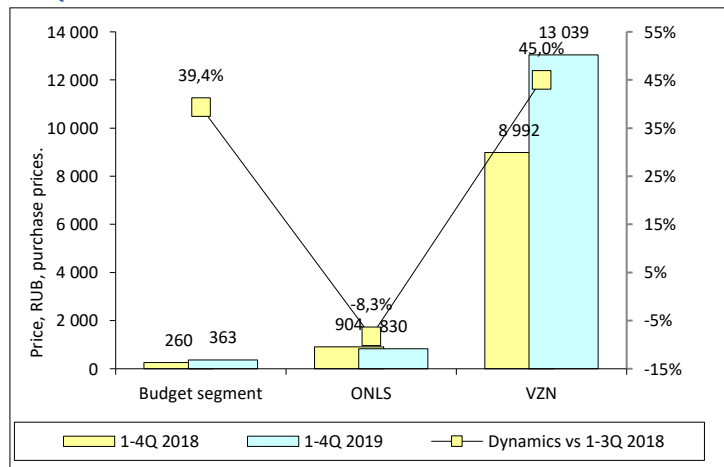


**Indicators of price dynamics and retail margins**

**Figure 1. Dynamics of weighted average prices and retail margins in 1-4 Q 2018 - 1-4 Q 2019**

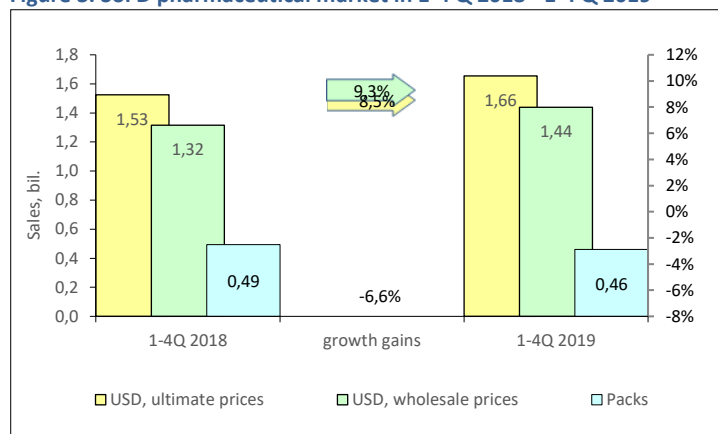


**Figure 2. Dynamics of weighted average purchase prices in 1-4 Q 2018 - 1-4 Q 2019**

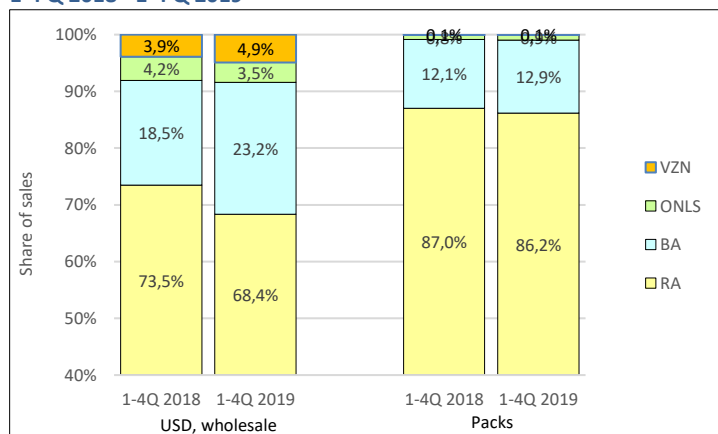


**Indicators of the dynamics and structure of the market**

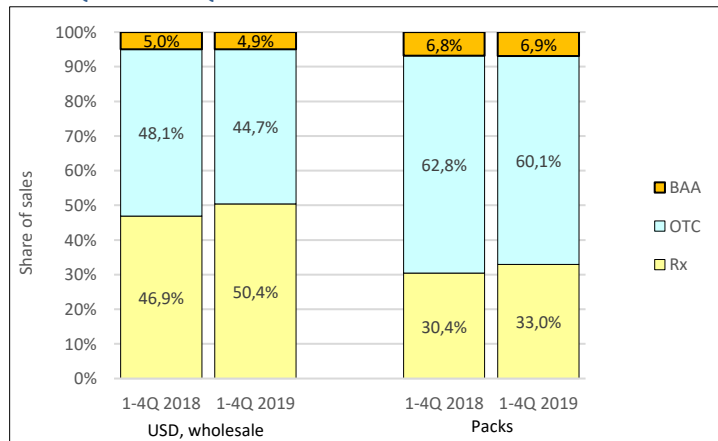
**Figure 3. SoFD pharmaceutical market in 1-4 Q 2018 - 1-4 Q 2019**



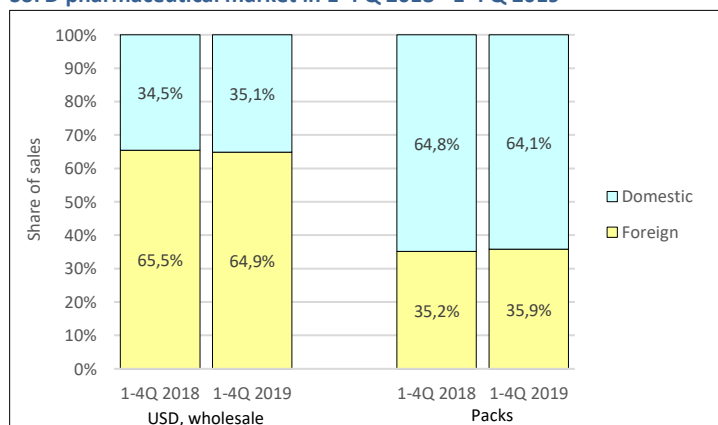
**Figure 4. Structure of SoFD pharmaceutical market by major segments in 1-4 Q 2018 - 1-4 Q 2019**



**Figure 5. Structure of the retail segment of SoFD pharmaceutical market in 1-4 Q 2018 - 1-4 Q 2019**



**Figure 6. Dynamics of the Russian/ foreign drugs share in the structure of SoFD pharmaceutical market in 1-4 Q 2018 - 1-4 Q 2019**



**PHARMACEUTICAL MARKET OF THE FAR EASTERN FEDERAL DISTRICT (FEFD) IN 1-4 Q OF 2019 KEY PERFORMANCE INDICATORS**

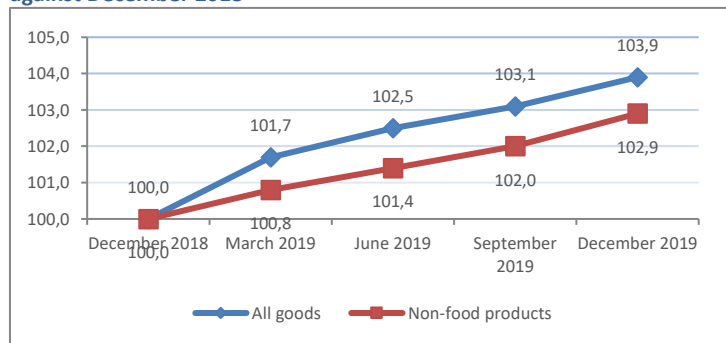
**Macroeconomic indices**

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

Value	December-January 2019	December-January 2019 (%) vs. December-January 2018
Industrial production index		106.0
Retail turnover, RUB bil.	1,865.9	102.6
Monthly average accrued wage per one worker (nominal), RUB	56,069	108.2
real		103.4

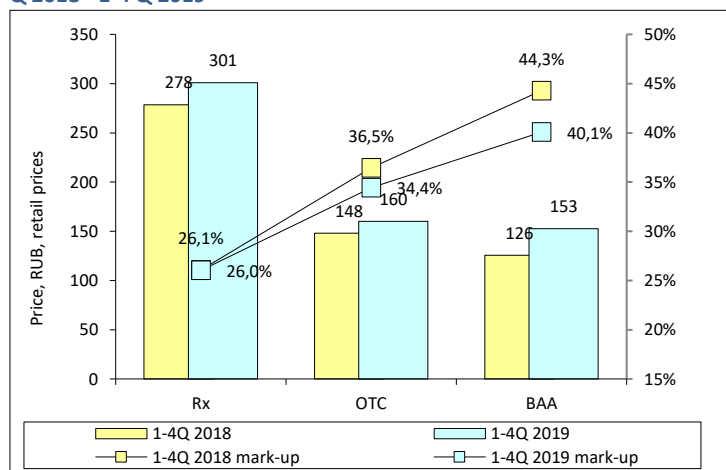
Note: FEFD TOGS data

**Figure 1. Dynamics of price index and price index for non-food products against December 2018**

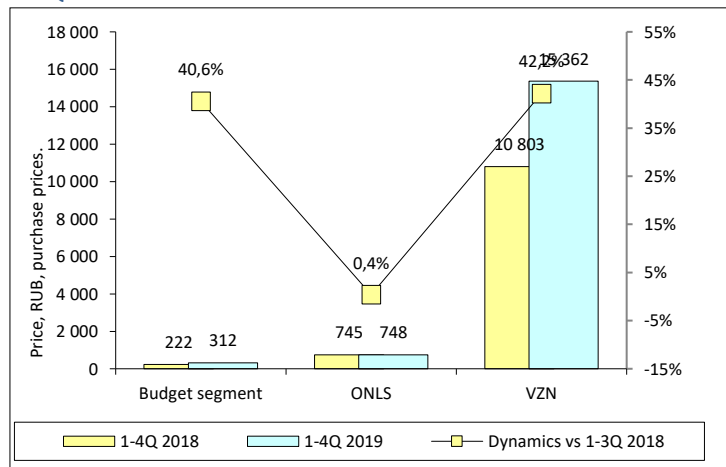


**Indicators of price dynamics and retail margins**

**Figure 1. Dynamics of weighted average prices and retail margins in 1-4 Q 2018 - 1-4 Q 2019**

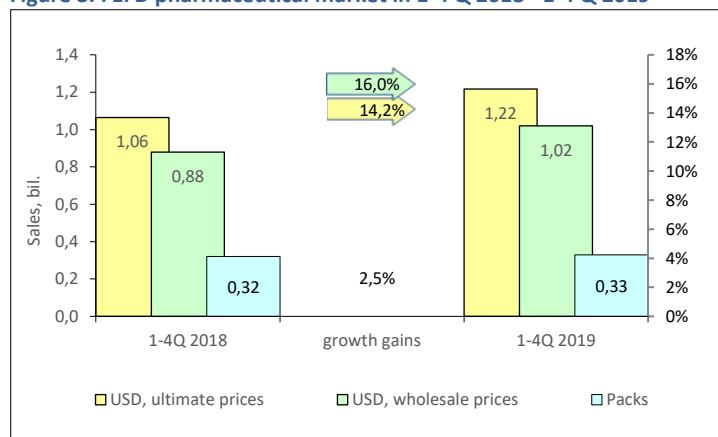


**Figure 2. Dynamics of weighted average purchase prices in 1-4 Q 2018 - 1-4 Q 2019**

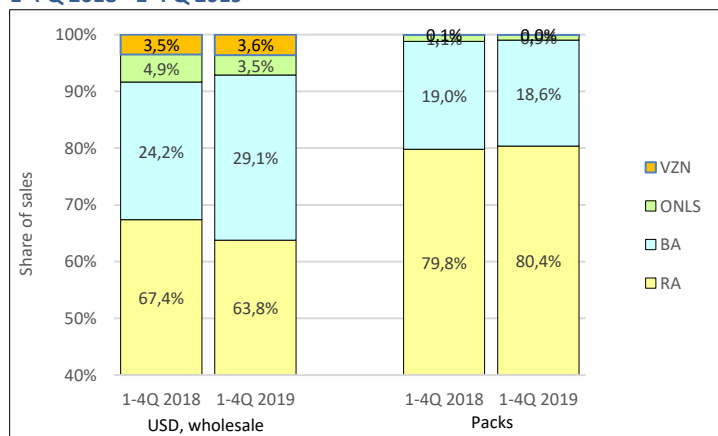


**Indicators of the dynamics and structure of the market**

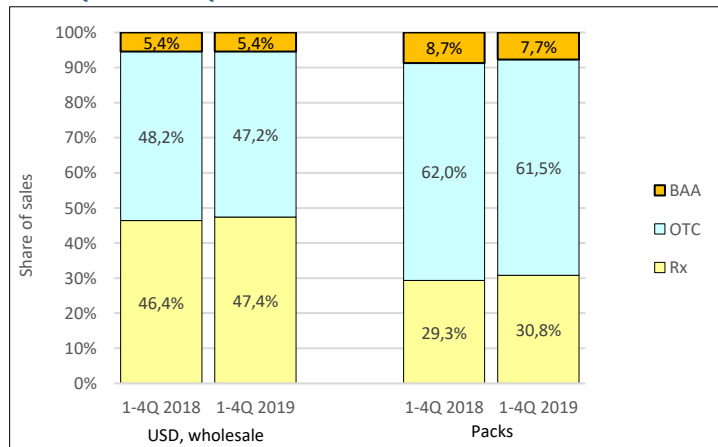
**Figure 3. FEFD pharmaceutical market in 1-4 Q 2018 - 1-4 Q 2019**



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



**Figure 5. Structure of the retail segment of FEFD pharmaceutical market in 1-4 Q 2018 - 1-4 Q 2019**



**Figure 6. Dynamics of the Russian/ foreign drugs share in the structure of FEFD pharmaceutical market in 1-4 Q 2018 - 1-4 Q 2019**

