



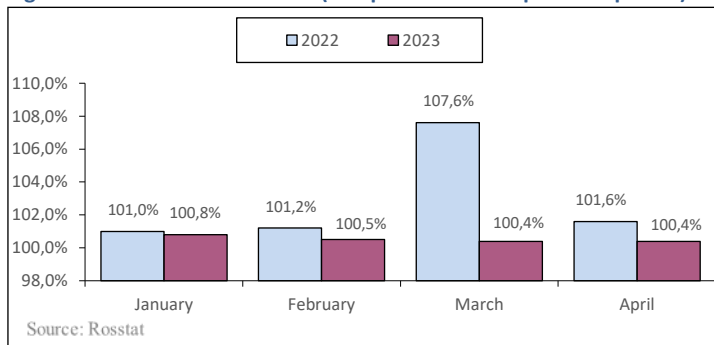
MACROECONOMIC INDICES

Inflation

According to Federal State Statistics Service's data, the Consumer Price Index was estimated as 100.4% in April 2023 compared to the previous month, and 102.1% compared to December 2022.

In April 2023, Industrial Producer Price Index was 102.4% as compared to the previous month, in the month-earlier period it had amounted to 102.6%. The index accounted for 105.0% as against December 2022.

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



Living standard

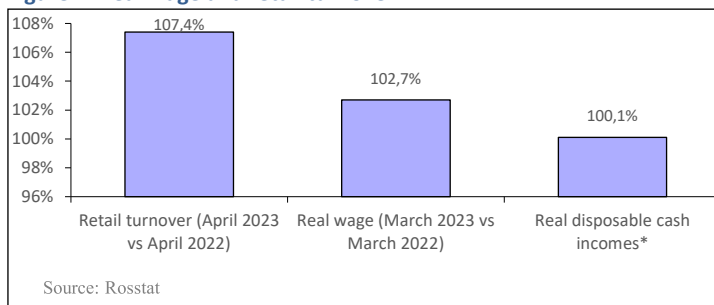
In March of 2023, a gross monthly average wage of corporate employees reached RUB 71,334 (USD 937.62). It accounted for 106.3% compared to March 2022, and 109.5% compared to the previous period. In March of 2023, the real gross wage accounted for 102.7% as compared to March of 2022, and 109.1% against the prior period.

According to estimates¹, real disposable cash incomes decreased by 100.1% in the first quarter of 2023 as compared to the first half of 2022 (Fig. 2).

Retail turnover

In April 2023, the retail turnover was equal to RUB 3668.5 bil. or 107.4% (in comparable prices) against the respective period of the previous year, and RUB 14,040.9 bil. or 96.4% in January - April 2023 (Fig. 2).

Figure 2. Real wage and retail turnover



* In January-March 2023 vs January-March 2022

Industrial Production

According to Federal State Statistics Service's data, in April 2023 Industrial Production Index accounted for 105.2% compared to the same period of the previous year, and 100.6% in January-April of 2023.

According to Federal State Statistics Service's data, Industrial Production Index of drugs and medical products in April 2023 accounted for 91.0% compared to the relevant period of 2022 and 87.6% in January-April of 2023.

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 April of 2023.

Table 1. The top ten Russian chemical and pharmaceutical manufacturers by sales volume in April 2023

Rank	Manufacturer	RUB mil.
1	Stada	2812.8
2	Binnopharm	2676.5
3	Biocad	2620.7
4	Otcpharm	2134.2
5	Pharmstandard	2099.8
6	Servier	1962.1
7	Vertex	1699.1
8	Grotex	1693.3
9	Microgen	1598.4
10	Atoll	1538.9

Source: IQVIA

Table 2 provides pharmacy sales data from 10 regions of the Russian Federation. In March 2023 compared to February, growth in sales (in terms of roubles) was observed in all regions. The most pronounced growth in sales was in Krasnodar Krai (+31%), the least one— in Krasnoyarsk Krai and Tatarstan (+0.1% each).

Table 2. Pharmacy sales in the regions, 2023

Region	Pharmacy sales, \$ mil. (Wholesale prices)			Growth gain, % (roubles)		
	January 2023	February 2023	March 2023	January 23/ December 22	February/January 23	March / February 23
Moscow	178.9	182.5	220.9	-37%	8%	26%
St. Petersburg	87.0	82.1	102.2	-31%	-0.4%	30%
Krasnodar Krai	59.4	55.8	70.1	-15%	-1%	31%
Krasnoyarsk Krai	30.9	30.1	32.2	-25%	3%	11%
Tatarstan	30.5	30.3	32.3	-21%	5%	11%
Rostov Region	35.1	33.3	39.0	-22%	-0.1%	22%
Novosibirsk Region	27.2	27.9	32.9	-32%	8%	23%
Voronezh Region	22.1	23.0	27.3	-28%	10%	24%
Perm	10.4	8.8	10.1	-12%	-11%	20%
Tyumen	10.6	10.7	11.7	-28%	7%	14%

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 April 2023

Rank	Company*	Amount of broadcasts
1	Otcpharm	8,990
2	Dr. Reddy's Laboratories	7,684
3	Materia Medica	6,452
4	Evalar	4,701
5	Transatlantik	2,701

Source - Remedium according to Mediascope's data

Table 4. Top five brand names in mass media in April, 2023

Rank	Brand*	Amount of broadcasts
1	Evalar	4,842
2	Rengalin	2,783
3	Renewal	2,693
4	Pentalgin	2,274
5	Nise	2,246

Source - Remedium according to Mediascope's data

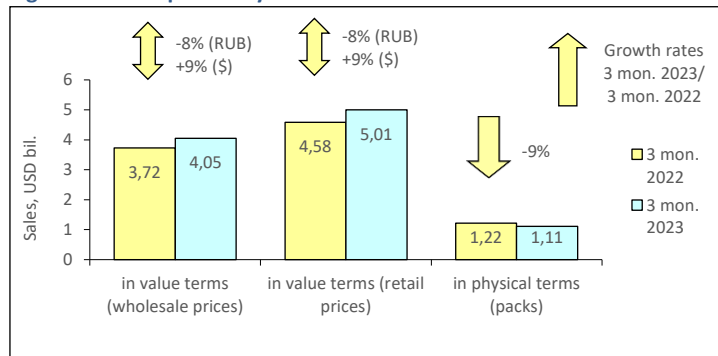
* Only drugs registered with the National Medicine Register were considered.

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: 2023 FIRST THREE MONTHS RESULTS

According to the results of the Retail Audit of FPP (Finished Pharmaceutical Products) in Russian Federation™, for the first three months of 2023 the national pharmacies sold 1,108 bil. drug packs, on top of that the market volume in physical terms reduced by 9% compared to the same period in 2022. In value terms, the market potential in January-March reduced by 8% in rouble terms and by 9% in dollar terms and its volume amounted to RUB 295.553 bil. (USD 4.052 bil.) in 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 the first quarter of 2023 vs USD 3.75 in 2022. Consumer spending for drugs in Russia averaged to USD 34.18 for 3 months of 2023, whereas during the same period a year ago it averaged to USD 31.47.

Figure 1. Russia pharmacy market for 3 months of 2022 – 3 months 2023*



According to the results of January-March 2023, almost all participants in the top 10 manufacturers in the Russian retail market reduced their sales volumes compared to the same period in the previous year (Table 1). However, the leadership among them was retained by BAYER, which reduced sales by 26%, and its market share by 1 p.p. OTCPHARM (-35%) moved down to rank three due to more pronounced negative growth rates, giving way to STADA (-6%). KRKA (-6%) that showed the same growth rates moved up from rank seven to four, displacing SERVIER (-19%) and SANOFI (-20%) down one rank. TEVA (-1%) and GEDEON RICHTER (-0.3%) moved up one rank, to numbers eight and ten. Note that the latter became one of two newcomers of the top 10 ranking. BINNOPHARM (+26%), the only one out of ten that showed a positive trend, also broke into the top ten ranking for the first time. ABBOTT reduced its sales by 18% and moved down to rank eight. The total share of the top-10 decreased by more than 2 p.p. and accounted for 30.5%.

Table 1. The top ten drug manufacturers by pharmacy sales

Rank in the top ten	3 mon. 2023	3 mon. 2022	Manufacturer*	Share in total pharmacy sales, %	
				3 mon. 2023	3 mon. 2022
1	1	1	BAYER	4.1	5.1
2	3	3	STADA	3.9	3.8
3	2	2	OTCPHARM	3.1	4.4
4	7	7	KRKA	3.0	3.0
5	4	4	SERVIER	3.0	3.4
6	5	5	SANOFI	3.0	3.4
7	8	8	TEVA	2.9	2.7
8	6	6	ABBOTT	2.8	3.1
9	15	15	BINNOPHARM GROUP	2.4	1.7
10	11	11	GEDEON RICHTER	2.3	2.1
Total				30.5	32.7

*AIPM members are in bold

The leader of the top 10 brand changed (Table 2). ARBIDOL which used to take rank number one cut its sales by 75% and moved down to the last rank. At the same time, XARELTO (-45%), ELIQUIS (-49%), INGAVIRIN (-33%) and DETRALEX (-21%) moved up one rank, coming in at the top four ranks despite a pronounced negative trend. On top of that, another four brands out of the top ten ranking rose in the ranks. HEPTRAL (-17%) moved up one rank, to number seven, NUROFEN (-7%) moved up two ranks, to number five. Two brands with positive growth rates, GRAMMIDIN (+9%) and PENTALGIN (+8%), broke into the top 10 for the first time, moving to ranks eight and nine. THERAFLU (-19%) kept its previous rank six. The total share of the top 10 brands decreased from 9.7% to 6.6%.

Table 2. The top ten brands by pharmacy sales

Rank in the top ten	3 mon. 2023	3 mon. 2022	Brand	Share in total pharmacy sales, %	
				3 mon. 2023	3 mon. 2022
1	2	2	XARELTO	1.0	1.7
2	3	3	ELIQUIS	0.8	1.5
3	4	4	INGAVIRIN	0.7	1.0
4	5	5	DETRALEX	0.7	0.8
5	7	7	NUROFEN	0.7	0.6
6	6	6	THERAFLU	0.6	0.7

* Here and elsewhere IQVIA's data are used

Rank in the top ten		Brand	Share in total pharmacy sales, %	
3 mon. 2023	3 mon. 2022		3 mon. 2023	3 mon. 2022
7	8	HEPTRAL	0.6	0.6
8	19	GRAMMIDIN	0.5	0.5
9	18	PENTALGIN	0.5	0.5
10	1	ARBIDOL	0.5	2.0
Total			6.6	9.7

XYLOMETAZOLINE, which sales increased by 7%, moved up to rank number one in the top 10 INNs and grouping names ranking (Table 3). IBUPROFEN (+5%), which also showed positive growth rates, was ranked second, moving up to rank two from six. The remaining INNs of the top 10 reduced their sales in varying degrees. The composition DIOSMIN*HESPERIDIN (-9%), as well as INNS NIMESULIDE (-4%) and PANCREATIN (-7%) showed low negative growth rates, moving up to ranks three, five and six, respectively. Note that the latter became the only newcomer of the top-10 ranking. ROSUVASTATIN and BISOPROLOL (-21% each) moved up to the higher ranks seven and nine. RIVAROXABAN (-45%), APIXABAN (-49%) and UMIFENOVIR (-70%), which were previously in the top three, moved down to ranks four, eight and ten due to a strong decline in sales. The total share of the top-10 INN and generic names decreased by 2.6 p.p. to 9.9%.

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

Rank in the top ten	3 mon. 2023	3 mon. 2022	INN/Grouping name	Share in total pharmacy sales, %	
				3 mon. 2023	3 mon. 2022
1	4	4	XYLOMETAZOLINE	1.6	1.4
2	6	6	IBUPROFEN	1.1	1.0
3	5	5	DIOSMIN*HESPERIDIN	1.1	1.1
4	2	2	RIVAROXABAN	1.0	1.7
5	9	9	NIMESULIDE	1.0	0.9
6	11	11	PANCREATIN	0.9	0.9
7	8	8	ROSUVASTATIN	0.8	1.0
8	3	3	APIXABAN	0.8	1.5
9	10	10	BISOPROLOL	0.8	0.9
10	1	1	UMIFENOVIR	0.7	2.2
Total				9.9	12.5

In January-March 2023, C09 Agents acting on the renin-angiotensin system (-18%), which moved up to the leaders from rank two, became the best-selling group in the retail market (Table 4). The groups with positive growth rates M01 Anti-inflammatory and antirheumatic products (+5%) and R01 Nasal preparations (+14%) moved up to ranks two and three. J01 Antibacterials for systemic use (+20%) that broke into the rating for the first time, moving up to rank eight, also showed growth in sales. The remaining brands reduced their sales. J05 Systemic antiviral drugs and B01 Anticoagulants reduced sales most notably by 40%, moving down from ranks one and three to four and seven. G03 Sex hormones and R05 Cough and cold preparations that showed a 12% decline in sales moved down to ranks six and ten. N02 Analgesics and N06 Psychoanaleptics sales decreased by 1%. On top of that, the former moved up to rank five from six and the latter managed to retain its previous rank nine. In total, the top ten ATC groups accumulated 38.2%, whereas in the year-earlier period — 40.3%.

Table 4. The top ten ATC groups by pharmacy sales

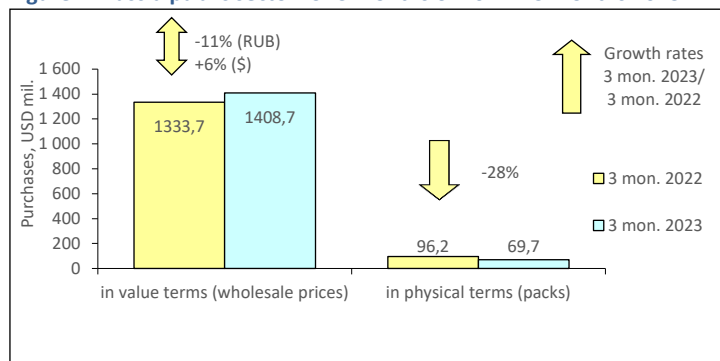
Rank in the top ten	3 mon. 2023	3 mon. 2022	ATC code	ATC group	Share in total pharmacy sales, %	
					3 mon. 2023	3 mon. 2022
1	2	2	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.1	5.7
2	4	4	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.1	4.5
3	7	7	R01	NASAL PREPARATIONS	4.1	3.3
4	1	1	J05	ANTIVIRALS FOR SYSTEMIC USE	3.8	5.8
5	6	6	N02	ANALGESICS	3.7	3.4
6	5	5	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.6	3.7
7	3	3	B01	ANTITHROMBOTIC AGENTS	3.4	5.2
8	13	13	J01	ANTIBACTERIALS FOR SYST USE	3.3	2.5
9	9	9	N06	PSYCHOANALEPTICS	3.1	2.9
10	8	8	R05	COUGH AND COLD PREPARATIONS	3.0	3.1
Total					38.2	40.3

Conclusion. In the first quarter of 2023, the retail pharmacy market of the country stood at RUB 365.1 bil. (USD 5.005 bil). As compared with the same period of 2022, the growth rates were negative (-8%) in terms of roubles, and positive (+9%) in terms of dollars. In pack terms, the market reduced by 9% compared to the prior year and amounted to 1.108 bil. packs. In January-March 2023, the average cost of an FPP pack in the national pharmacies was USD 4.52, whereas in the year-earlier period it was USD 3.75. The average expenses of the Russian Federation residents for purchase of drugs in the pharmacies based on the results for the first 3 months of 2023 increased as compared to 2022 (USD 34.18 vs. USD 31.47).

RUSSIAN FEDERATION HOSPITAL MARKET: 2023 FIRST THREE MONTHS RESULTS

According to the results of the Budget Audit of Finished Pharma Products (FFP) in the Russian Federation (without DLO and regional benefit)TM, in January-March of 2023 the public procurement segment of the country in physical terms reduced by 28% as compared to the same period of the previous year and amounted to 69.665 mil. packs. In value terms, the market showed negative growth rates (-11%) in terms of roubles and positive (+6%) in terms of dollars and it reached RUB 12.731 bil. (USD 1.409 bil.) at wholesale prices. In the first quarter of 2023, the average cost of an FFP pack in the public procurement sector of the country was USD 20.22, whereas in the year-earlier period its cost was USD 13.86.

Figure 1. Russia public sector for 3 months of 2022 – 3 months 2023*



Based on the results for the first three months of 2023, four manufacturers from the top 10 budget segment demonstrated negative growth rates (Table 1). BIOCAD (-49%) that cut its purchase volumes by almost half moved down from rank one to six, MSD (-37%) – from rank two to three, and BRISTOL MYERS (-29%) from rank seven to nine. Although GLAXOSMITHKLINE (-21%) showed a pronounced negative trend, it moved up to the higher rank ten, becoming one of the four newcomers to the top 10 ranking. In addition to it, JOHNSON & JOHNSON, PTC THERAPEUTICS and MICROGEN broke into the top ten for the first time, increasing their purchase volumes by 2.3 times, 6.9 times and 6 times, respectively. ROCHE (+70%) and NOVARTIS (+21%) demonstrated high positive growth rates, moving up to ranks one and five. ASTRAZENECA (+7%) that was less dynamic in sales moved two ranks up, to number seven. In total, the top ten manufacturers accounted for 51.6% of the public procurement segment, which was 11 p.p. more than than the year-earlier period figure.

Table 1. The top 10 manufacturers by public segment volume

Rank in the top ten		Manufacturer*	Share in total public segment, %	
3 mon. 2023	3 mon. 2022		3 mon. 2023	3 mon. 2022
1	4	ROCHE	10.2	5.4
2	13	JOHNSON & JOHNSON	6.5	2.5
3	2	MSD	5.8	8.2
4	27	PTC THERAPEUTICS	5.3	0.7
5	8	NOVARTIS	5.2	3.8
6	1	BIOCAD RF	5.1	8.9
7	9	ASTRAZENECA	4.0	3.3
8	33	MICROGEN	3.9	0.6
9	7	BRISTOL MYERS SQU	3.2	4.0
10	12	GLAXOSMITHKLINE	2.4	2.7
Total			51.6	40.2

*AIPM members are in bold

The newcomers TRANSLARNA (6.9-fold growth in purchases), EVRYSDI (7.8-fold growth) and SPINRAZA (16-fold growth), which broke into the top 10 for the first time, moving up to the top lines from the second, third and fourth dozen, became the most demanded brands in the hospital market of the country (Table 2). Another two newcomers, SOVIGRIPP (1254-fold growth) and ORKAMBI (2.2-fold growth), moved up to ranks five and eight, respectively. The last year's leaders KEYTRUDA (-30%), OPDIVO (-31%), TIVICAY (-0.5%) and ZOLGENSMA (-2%) reduced their purchase volumes to different extent and moved down to position four and ranks six through eight, respectively. PERJETA (+1%) moved down from rank six to the last one. The total share of the top 10 brands in the public segment expanded by 2 times from 15.0% to 29.9%.

Table 2. The top 10 brands by public segment volume

Rank in the top ten		Brand	Share in total public segment, %	
3 mon. 2023	3 mon. 2022		3 mon. 2023	3 mon. 2022
1	17	TRANSLARNA	5.3	0.7
2	22	EVRYSDI	4.1	0.5
3	39	SPINRAZA	3.7	0.2
4	1	KEYTRUDA	3.4	4.3
5	46	SOVIGRIPP	3.2	0.0
6	2	OPDIVO	2.5	3.3
7	3	TIVICAY	2.2	2.0
8	4	ZOLGENSMA	1.9	1.7

* Here and elsewhere IQVIA's data are used

Rank in the top ten		Brand	Share in total public segment, %	
3 mon. 2023	3 mon. 2022		3 mon. 2023	3 mon. 2022
9	16	ORKAMBI	1.9	0.7
10	6	PERJETA	1.8	1.6
Total			29.9	15.0

Four newcomers broke into the ranks of the top ten INN and group names ranking (Table 3). ATALUREN (6.9-fold growth in purchases) headed the top ten ranking and VACCINE, INFLUENZA (1059-fold growth), as well as RISDIPLAM (7.8-fold growth) and NUSINERSEN (16-fold growth) moved up to ranks four and five. The remaining top 10 INNs moved down to the lower ranks. The former leader PEMBROLIZUMAB (-9%) moved two ranks down. Although INN BEVACIZUMAB (+16%) and PANCREATIN (+1%) showed positive growth rates, they moved down to ranks seven and ten, respectively. NIVOLUMAB (-31%), DOLUTEGRAVIR (-0.5%) and ONASEMNOGENE ABEPARVOVEC (-2%) showed negative growth rates and fell in the ranks, moving down to ranks six, eight and nine. The total share accumulated by the top-ten INNs and grouping names accounted for 32.8%, whereas in the year-earlier period it was 16.0%.

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, %	
3 mon. 2023	3 mon. 2022		3 mon. 2023	3 mon. 2022
1	17	ATALUREN	5.3	0.7
2	50	VACCINE, INFLUENZA	4.6	0.0
3	1	PEMBROLIZUMAB	4.4	4.3
4	23	RISDIPLAM	4.1	0.5
5	46	NUSINERSEN	3.7	0.2
6	2	NIVOLUMAB	2.5	3.3
7	4	BEVACIZUMAB	2.2	1.7
8	3	DOLUTEGRAVIR	2.2	2.0
9	5	ONASEMNOGENE ABEPARVOVEC	1.9	1.7
10	6	PERTUZUMAB	1.8	1.6
Total			32.8	16.0

The leader of the top ten ATC groups ranking did not change: L01 Antineoplastic agents (+11%) held and reinforced its previous rank number one (Table 4). M09 Other drugs for disorders of the musculo-skeletal system, the most dynamic among the top ten groups, was ranked second by public procurement volume (4.3-fold growth in purchases). In addition to them, another four of the top ten ATC groups ranking showed high positive growth in sales. The group J07 Vaccines increased its purchases by 3.5 times and moved from rank nine to four. L02 Endocrine therapy (+22%) moved one rank up to number nine. The newcomers A16 Other alimentary tract and metabolism products (+66%) and R07 Other respiratory system products (+86%) broke into the ranks of the top ten ranking for the first time, moving up to ranks six and ten, respectively. The markets of another four ATC groups developed at a negative pace: At the same time, group B05 Blood substitutes and perfusion solutions (-3%) moved up one rank, to number seven, while J01 Antibacterials for systemic use (-30%) retained its previous rank five. Only J05 Antivirals for systemic use (-62%) and B01 Anticoagulants (-65%) moved down to ranks three and eight. In total, the top ten ATC groups accumulated 82.5% of purchases in the public procurement sector, 73.4% 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, %	
3 mon. 2023	3 mon. 2022			3 mon. 2023	3 mon. 2022
1	1	L01	ANTINEOPLASTIC AGENTS	32.1	25.7
2	6	M09	OTHER DRUGS FOR DISORDERS OF THE MUSCULO-SKELETAL SYSTEM	15.0	3.1
3	2	J05	ANTIVIRALS FOR SYSTEMIC USE	10.5	24.8
4	9	J07	VACCINES	9.1	2.3
5	5	J01	ANTIBACTERIALS FOR SYST USE	3.5	4.5
6	11	A16	OTHER ALIMENTARY TRACT AND METABOLISM PRODUCTS	2.6	1.4
7	8	B05	BLOOD SUBSTITUTES AND PERFUSION SOLUTIONS	2.6	2.4
8	4	B01	ANTITHROMBOTIC AGENTS	2.5	6.4
9	10	L02	ENDOCRINE THERAPY	2.4	1.8
10	13	R07	OTHER RESPIRATORY SYSTEM PRODUCTS	2.3	1.1
Total				82.5	73.4

Conclusion. Based on the results for three months of 2023, the public procurement segment of Russia reduced by 3% in rouble terms and expanded by 14% in dollar terms, and stood at RUB 102.731 bil. (USD 1.409 bil.). In natural terms, the market reduced by 28% and amounted to 69.665 mil. packs based on the results for the first quarter. In the period under review, the average cost of a finished pharma product (FPP) pack in the public sector of the country amounted to USD 20.22 vs. USD 13.86 in the year earlier period.

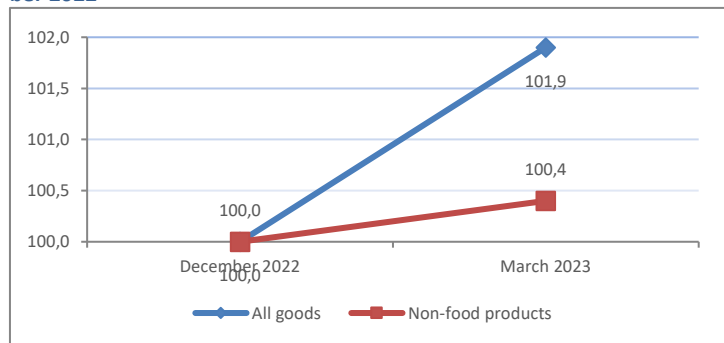
Macroeconomic indices

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

Value	January-March 2023	January-March (%) vs January-March 2022
Industrial production index		104.7
Retail turnover, RUB bil.	3,415.0	88.0
Monthly average accrued wage per one worker (nominal), RUB	84,195	106.9
real		97.9

Note: CFD TOGS data

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



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

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

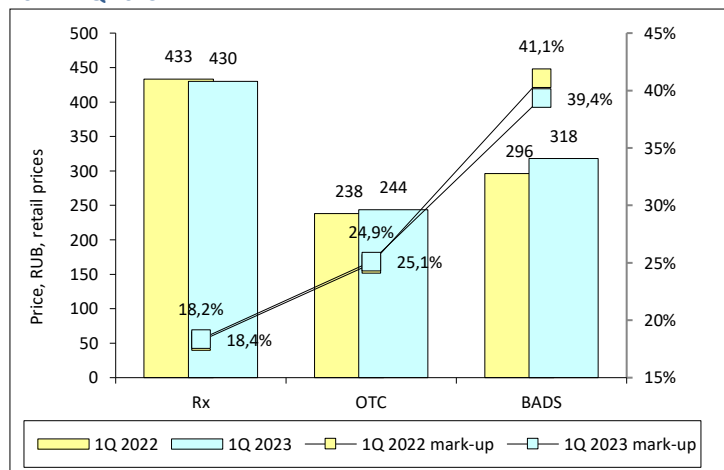
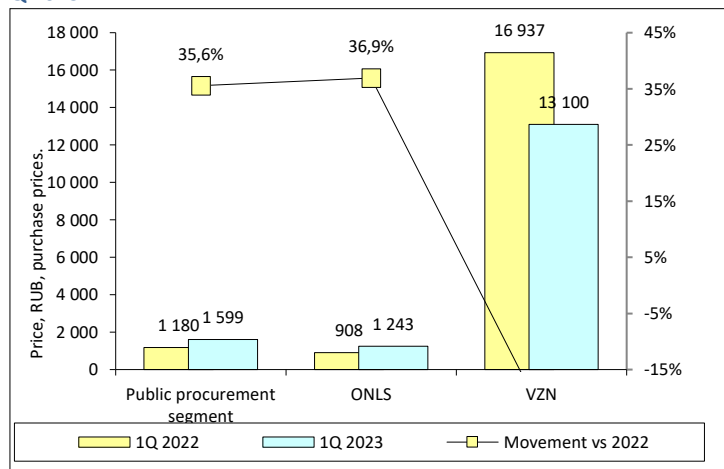


Figure 2. Movement of weighted average purchase prices in 1 Q 2022–1 Q 2023



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

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

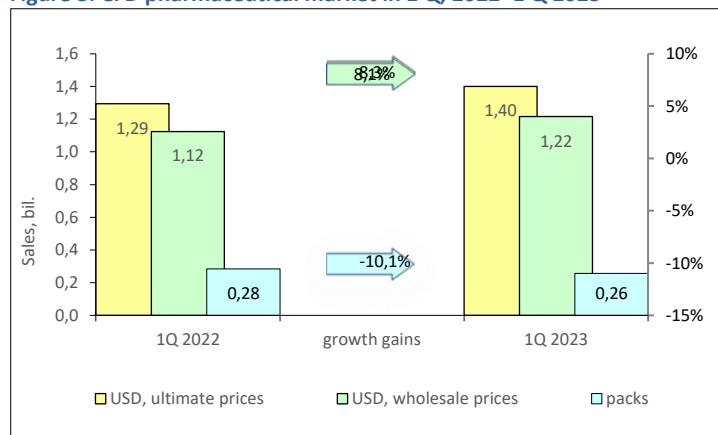


Figure 4. Structure of CFD pharmaceutical market by major segments in 1 Q, 2022–1 Q 2023

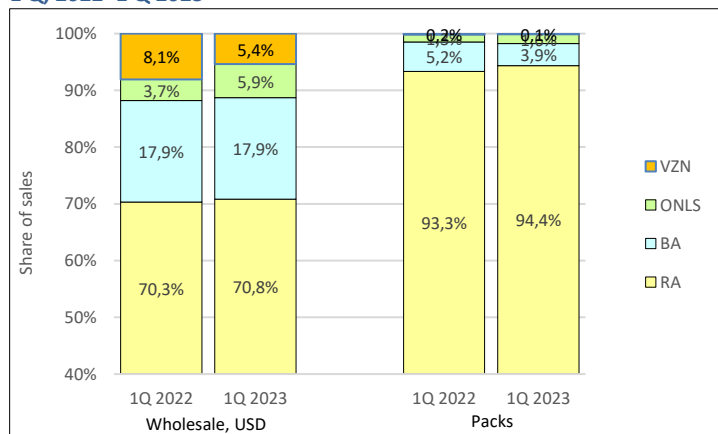


Figure 5. Structure of the retail segment of CFD market in 1 Q, 2022–1 Q 2023

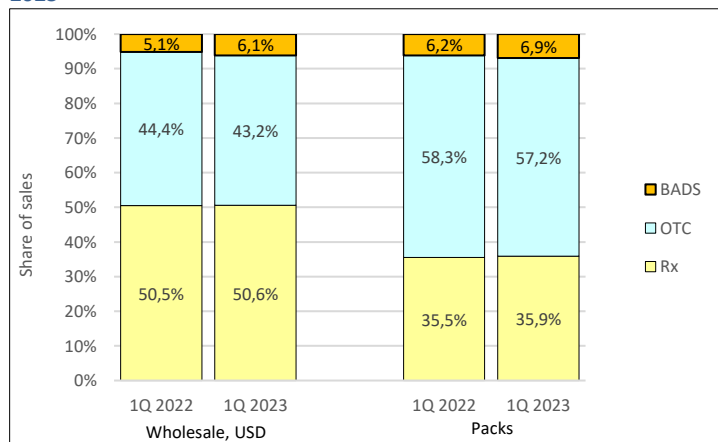
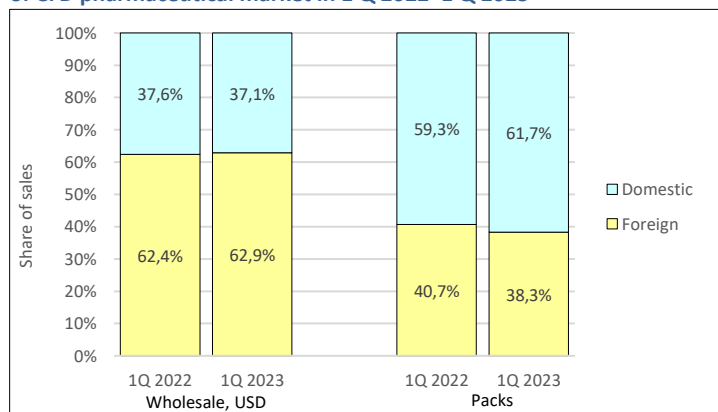


Figure 6. Movement of the Russian/foreign drugs share in the structure of CFD pharmaceutical market in 1 Q 2022–1 Q 2023



* Here and elsewhere IQVIA's data are used

³ Exclusive of Moscow

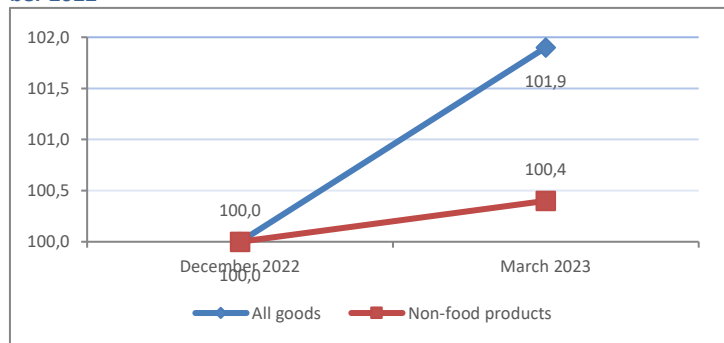
Macroeconomic indices

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

Value	January-March 2023	January-March (%) vs January-March 2022
Industrial production index		98.5
Retail turnover, RUB bil.	1,064.0	90.3
Monthly average accrued wage per one worker (nominal), RUB	74,334	110.0
real		101.3

Note: NWFD TOGS data

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



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

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

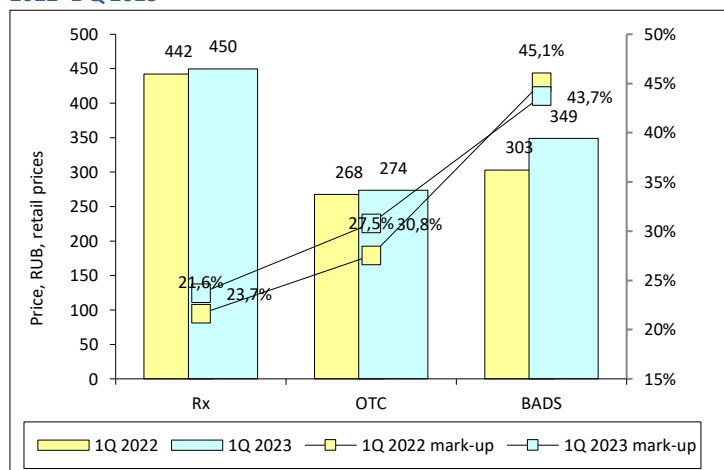
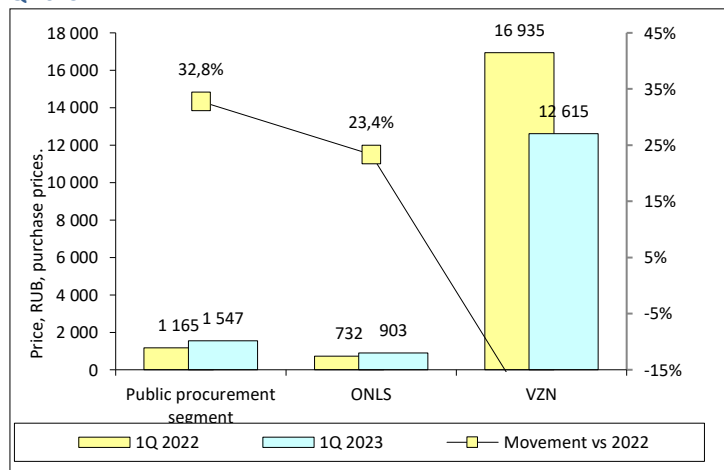


Figure 2. Movement of weighted average purchase prices in 1 Q 2022–1 Q 2023



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

Figure 3. NWFD pharmaceutical market in Q 1 2022–1 Q 2023

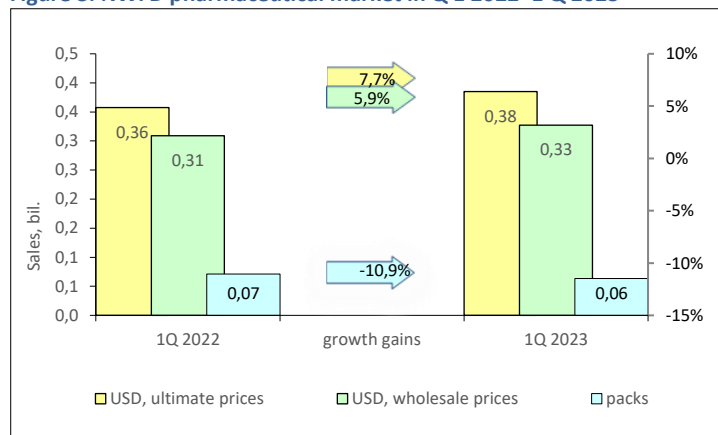


Figure 4. Structure of NWFD pharmaceutical market by major segments in 1 Q 2022–1 Q 2023

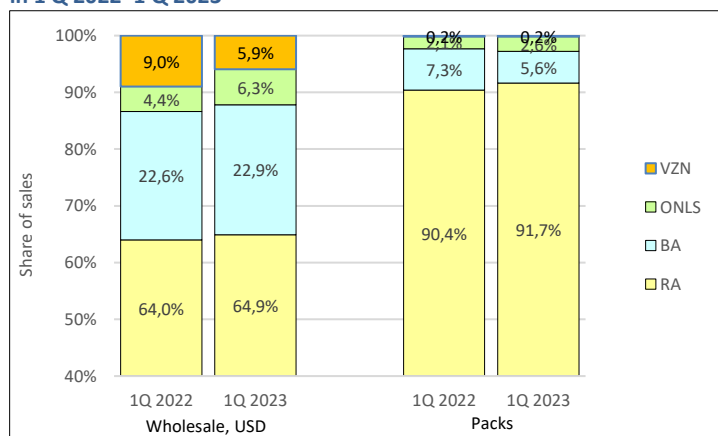


Figure 5. Structure of the retail segment of NWFD pharmaceutical market in 1 Q 2022–1 Q 2023

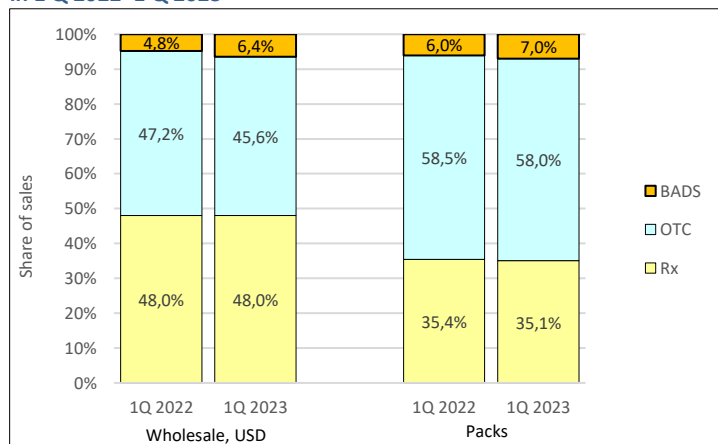
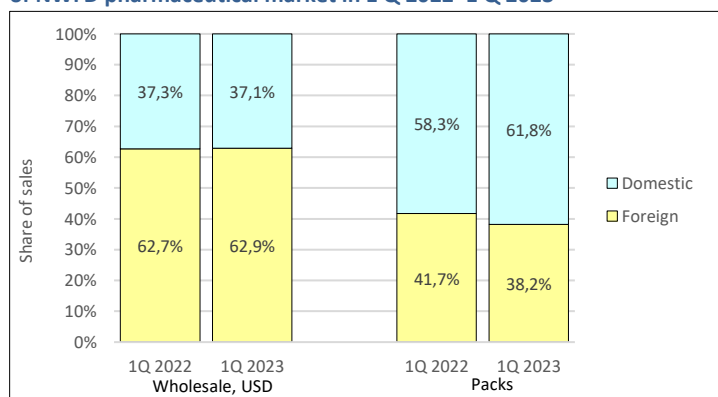


Figure 6. Movement of the Russian/ foreign drugs share in the structure of NWFD pharmaceutical market in 1 Q 2022–1 Q 2023



* Here and elsewhere IQVIA's data are used

⁴ Exclusive of St. Petersburg

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

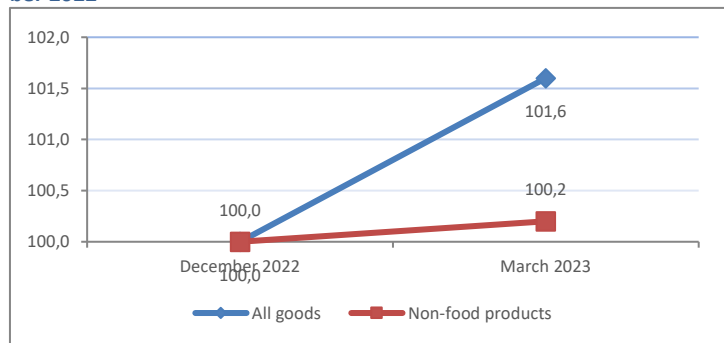
Macroeconomic indices

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

Value	January-March 2023	January-March (%) vs January-March 2022
Industrial production index		101.3
Retail turnover, RUB bil.	1,827.5	98.6
Monthly average accrued wage per one worker (nominal), RUB	46,483	115.6
real		106.4

Note: VFD TOGS data

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



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

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

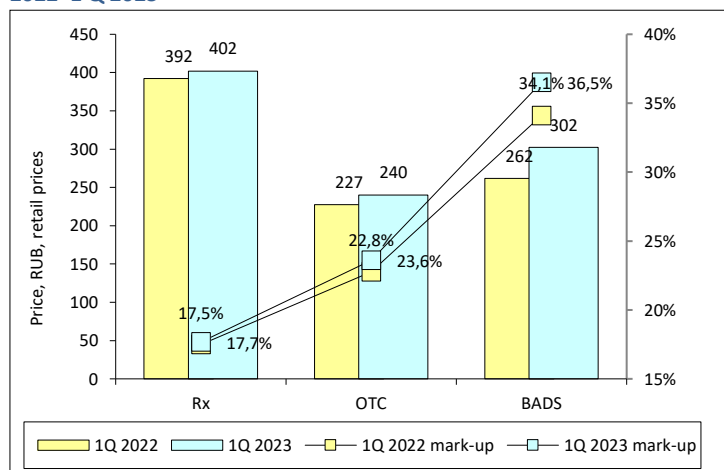
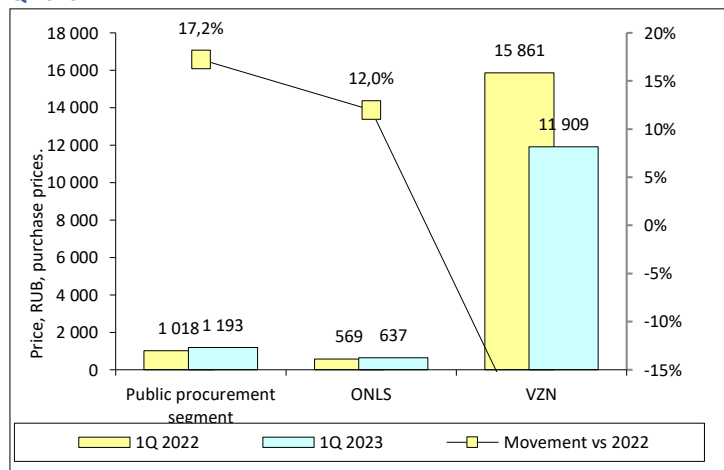


Figure 2. Movement of weighted average purchase prices in 1 Q 2022–1 Q 2023



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

Figure 3. VFD pharmaceutical market in 1 Q 2022–1 Q 2023

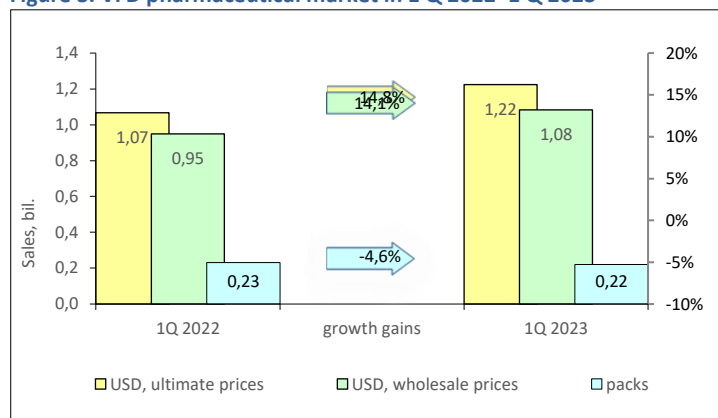


Figure 4. Structure of VFD pharmaceutical market by major segments in 1 Q 2022–1 Q 2023

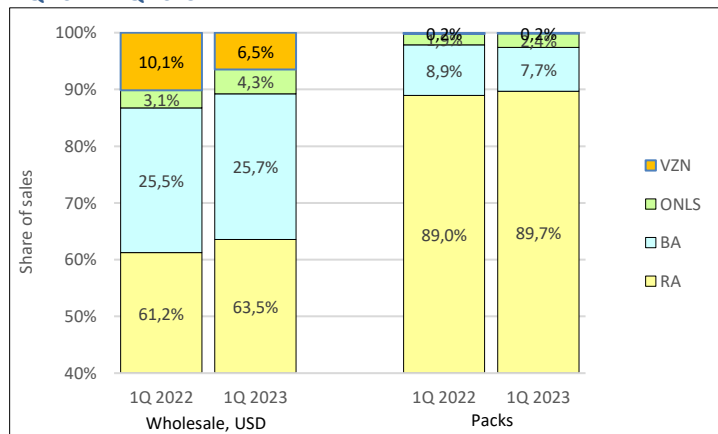


Figure 5. Structure of the retail segment of VFD pharmaceutical market in 1 Q 2022–1 Q 2023

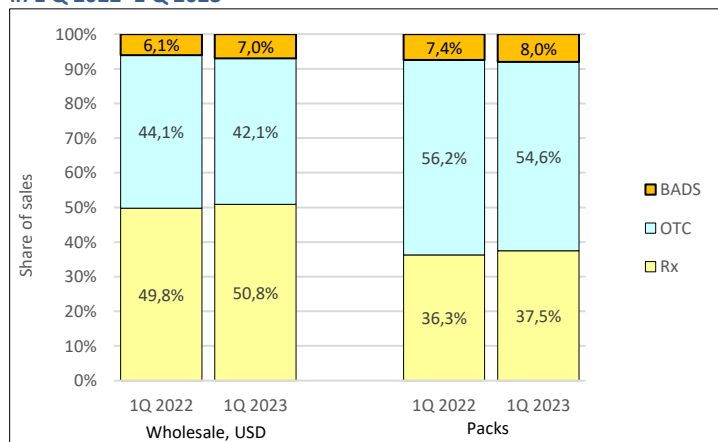
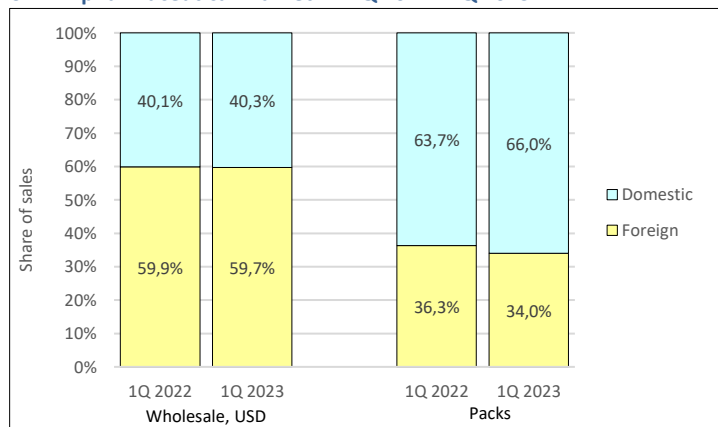


Figure 6. Movement of the Russian/ foreign drugs share in the structure of VFD pharmaceutical market in 1 Q 2022–1 Q 2023



* Here and elsewhere IQVIA's data are used

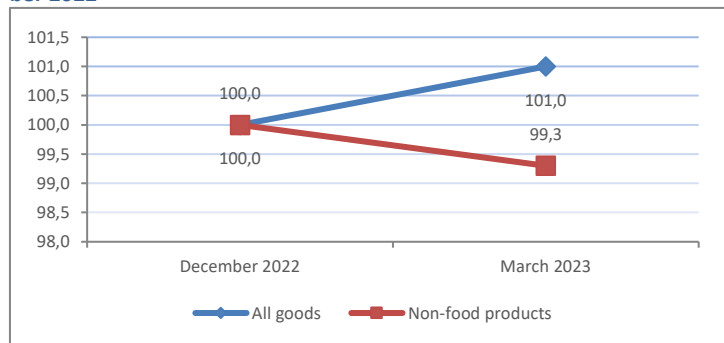
Macroeconomic indices

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

Value	January-March 2023	January-March (%) vs January-March 2022
Industrial production index		98.5
Retail turnover, RUB bil.	855.8	99.3
Monthly average accrued wage per one worker (nominal), RUB	70,126	112.8
real		105.6

Note: VFD TOGS data

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



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

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

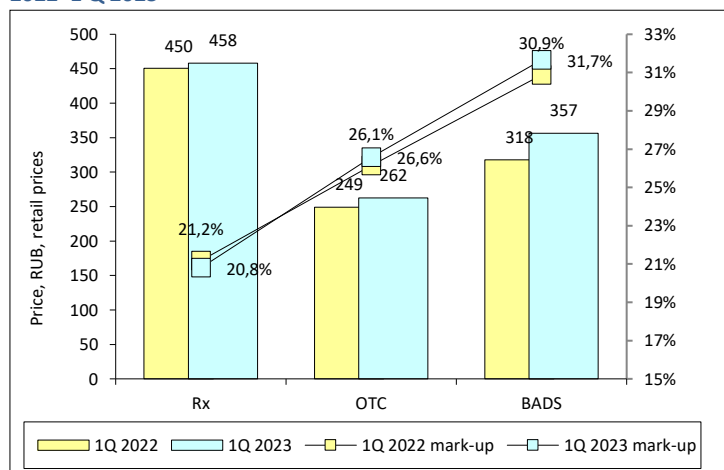
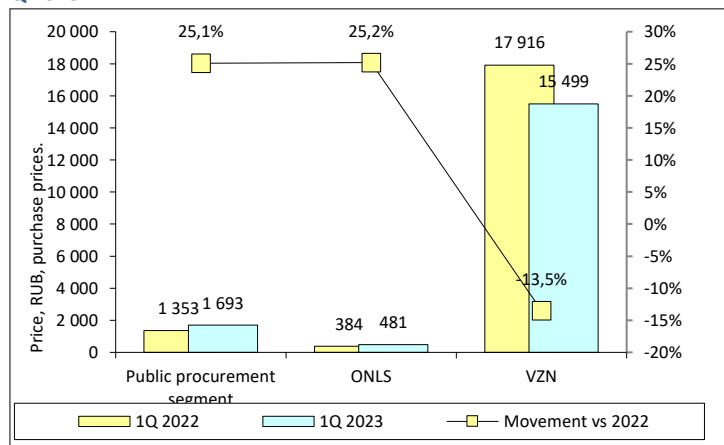


Figure 2. Movement of weighted average purchase prices in 1 Q 2022–1 Q 2023



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

Figure 3. UrFD pharmaceutical market in 1 Q 2022–1 Q 2023

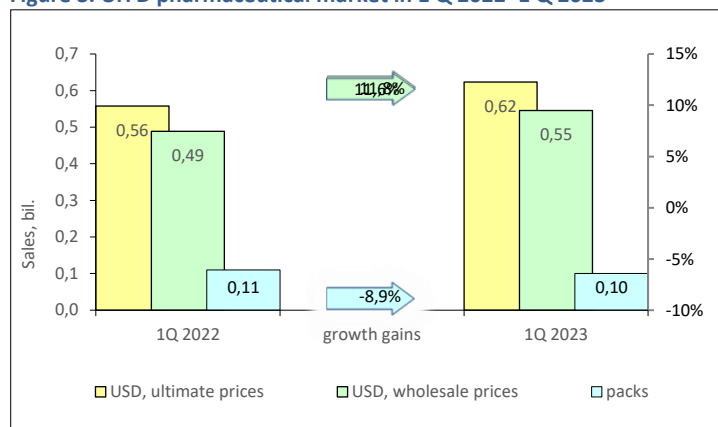


Figure 4. Structure of UFD pharmaceutical market by major segments in 1 Q 2022–1 Q 2023

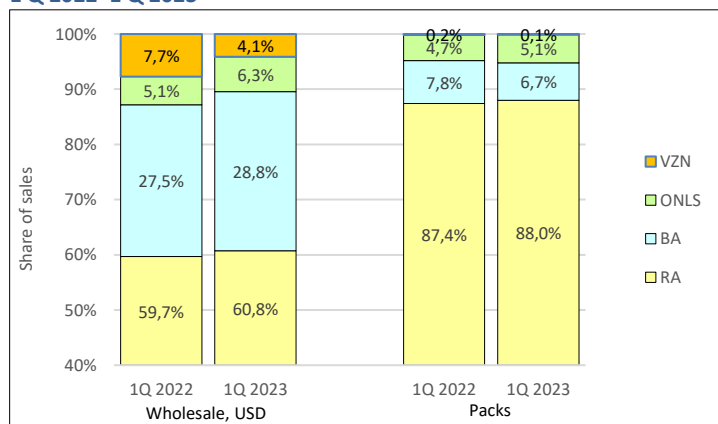


Figure 5. Structure of the retail segment of UrFD pharmaceutical market in 1 Q 2022–1 Q 2023

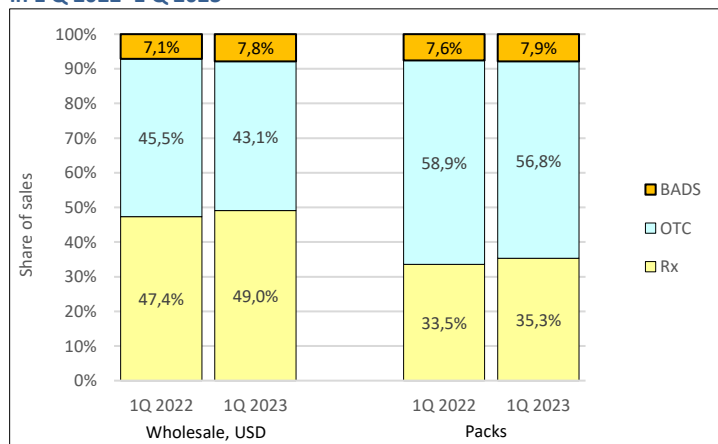
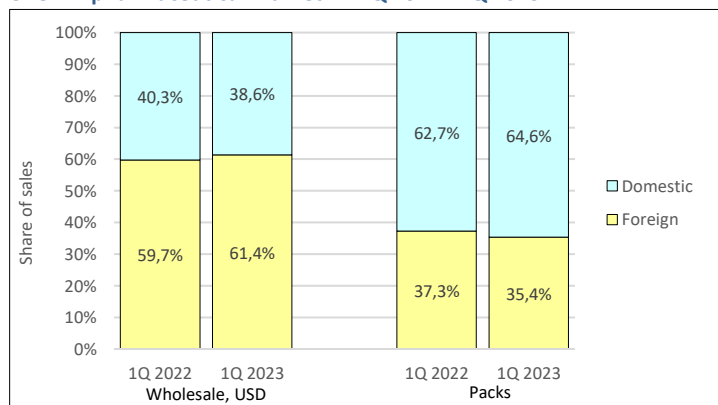


Figure 6. Movement of the Russian/ foreign drugs share in the structure of UrFD pharmaceutical market in 1 Q 2022–1 Q 2023



* Here and elsewhere IQVIA's data are used

Macroeconomic indices

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

Value	January-March 2023	January-March (%) vs January-March 2022
Industrial production index		98.2
Retail turnover, RUB bil.	948.0	95.8
Monthly average accrued wage per one worker (nominal), RUB	59,045	113.9
real		105.3

Note: SiFD TOGS data

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



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

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

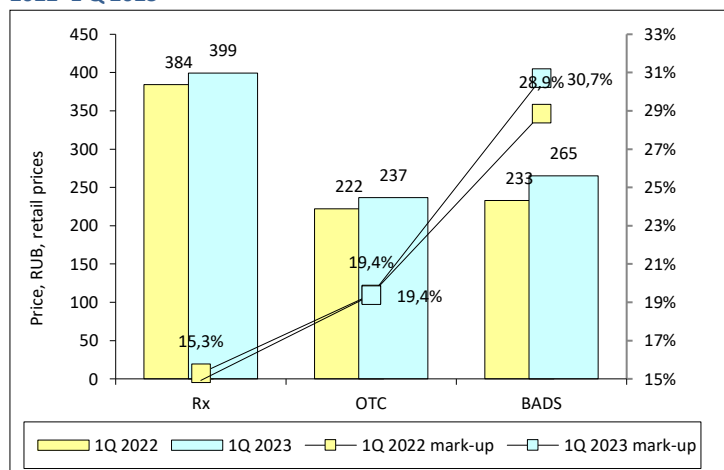
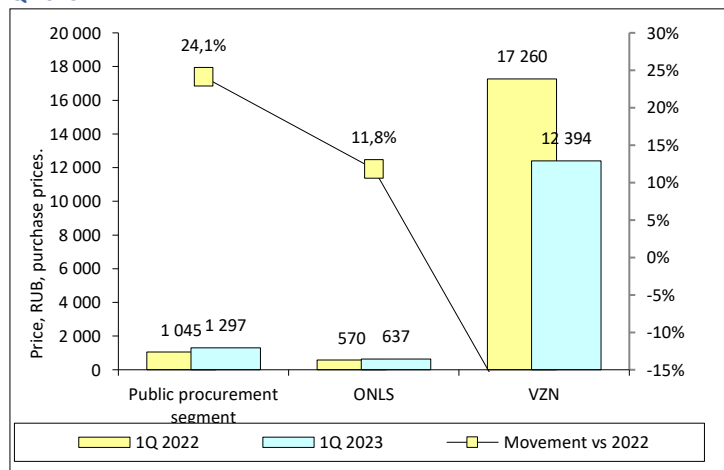


Figure 2. Movement of weighted average purchase prices in 1 Q 2022–1 Q 2023



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

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

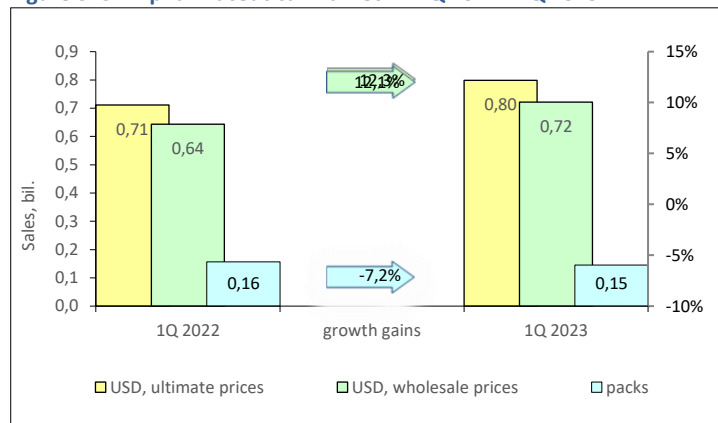


Figure 4. Structure of SiFD pharmaceutical market by major segments in 1 Q 2022–1 Q 2023

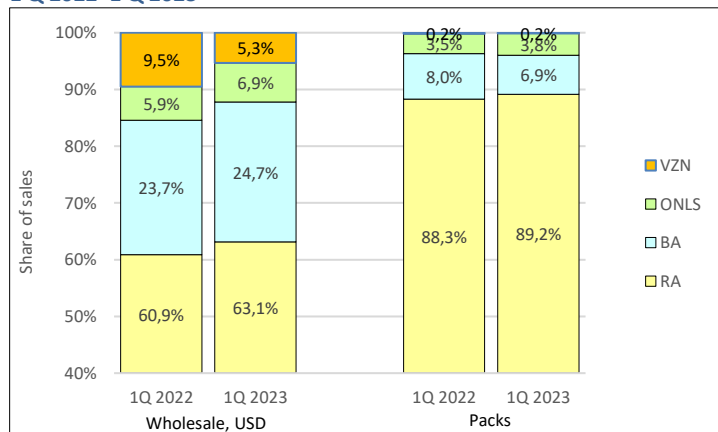


Figure 5. Structure of the retail segment of SiFD pharmaceutical market in 1 Q 2022–1 Q 2023

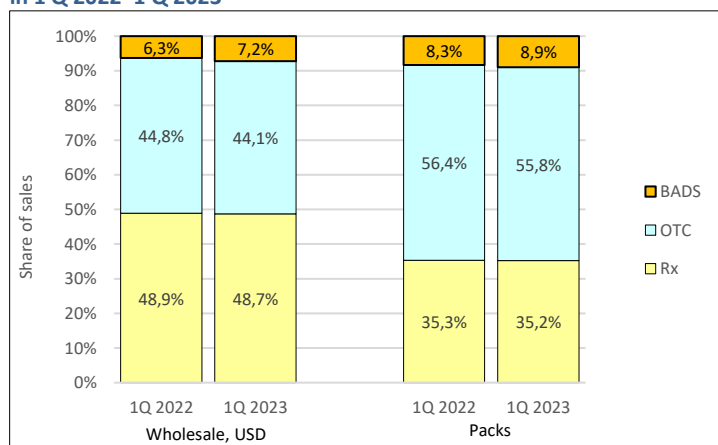
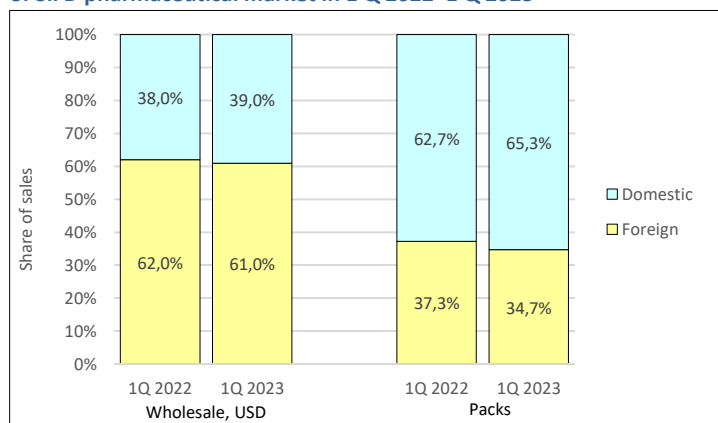


Figure 6. Movement of the Russian/ foreign drugs share in the structure of SiFD pharmaceutical market in 1 Q 2022–1 Q 2023



* Here and elsewhere IQVIA's data are used

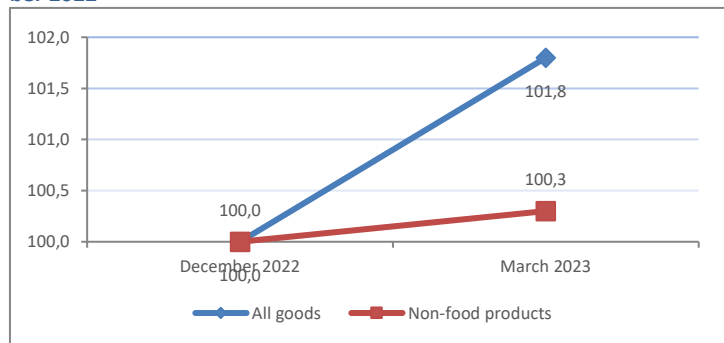
Macroeconomic indices

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

Value	January-March 2023	January-March (%) vs January-March 2022
Industrial production index		100.6
Retail turnover, RUB bil.	1,184.3	99.5
Monthly average accrued wage per one worker (nominal), RUB	47,157	114.9
real		105.5

Note: SoFD TOGS data

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



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

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

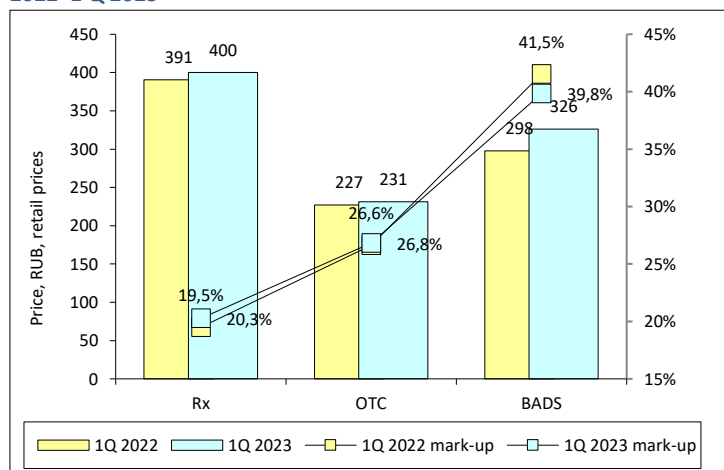
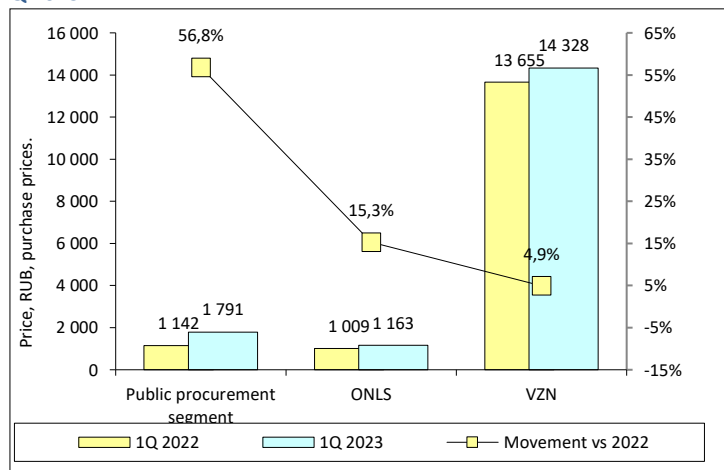


Figure 2. Movement of weighted average purchase prices in 1 Q 2022–1 Q 2023



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

Figure 3. SoFD pharmaceutical market in 1 Q 2022–1 Q 2023

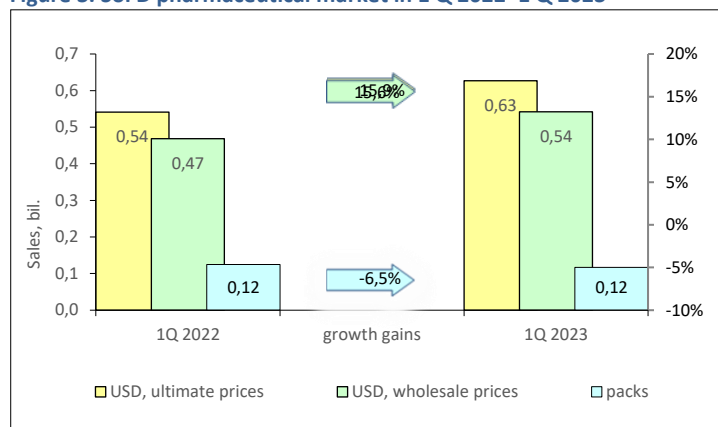


Figure 4. Structure of SoFD pharmaceutical market by major segments in Q 1 2022–1 Q 2023

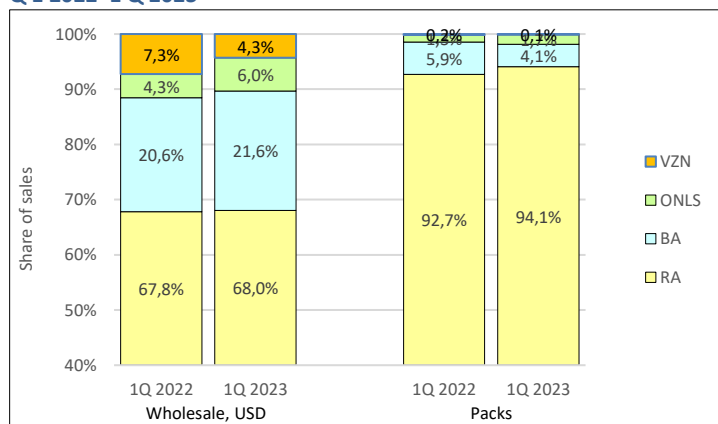


Figure 5. Structure of the retail segment of SoFD pharmaceutical market in 1 Q 2022–1 Q 2023

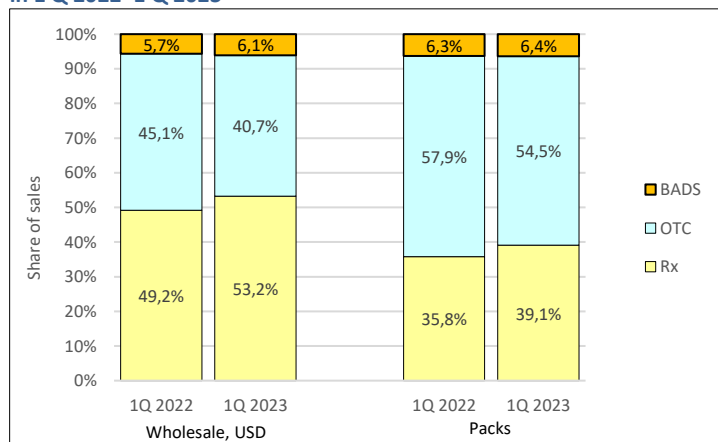
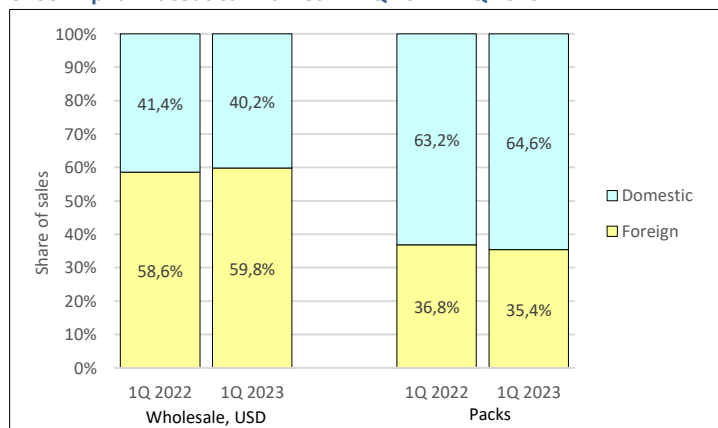


Figure 6. Movement of the Russian/ foreign drugs share in the structure of SoFD pharmaceutical market in 1 Q 2022–1 Q 2023



* Here and elsewhere IQVIA's data are used

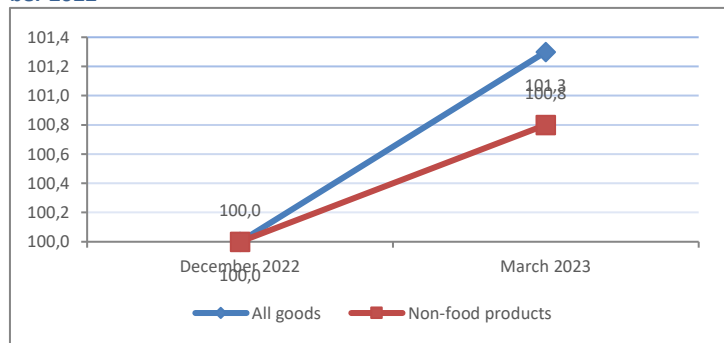
Macroeconomic indices

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

Value	January-March 2023	January-March (%) vs January-March 2022
Industrial production index		97.0
Retail turnover, RUB bil.	585.8	96.8
Monthly average accrued wage per one worker (nominal), RUB	75,450	112.0
real		102.8

Note: FEFD TOGS data

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



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

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

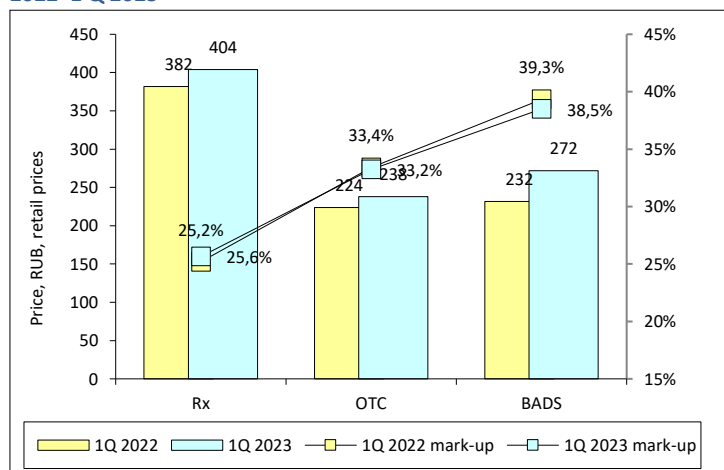
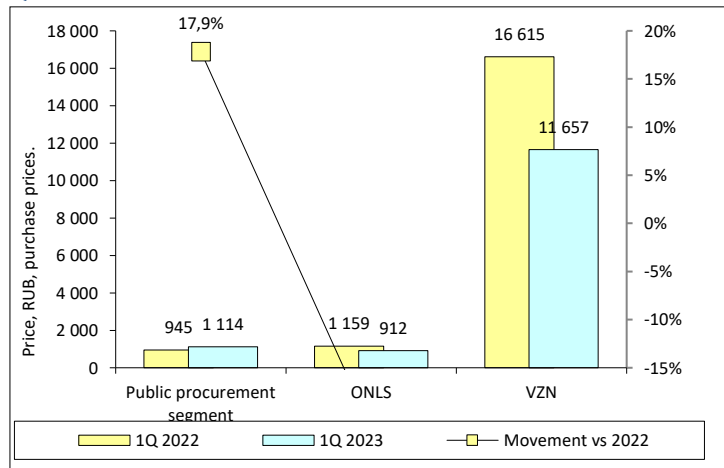


Figure 2. Movement of weighted average purchase prices in 1 Q 2022–1 Q 2023



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

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

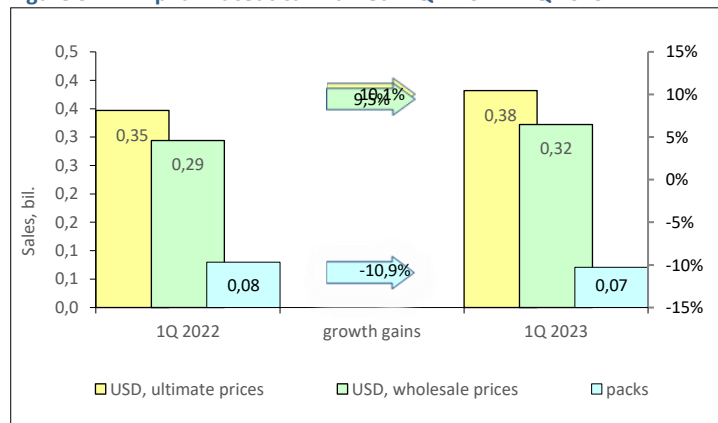


Figure 4. Structure of FEFD pharmaceutical market by major segments in 1 Q 2022–1 Q 2023

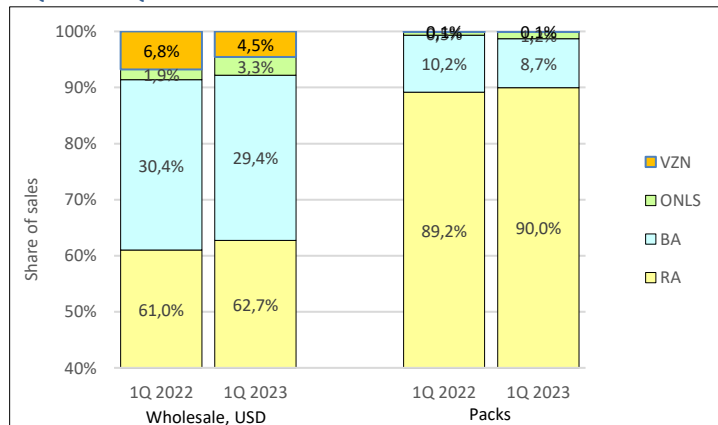


Figure 5. Structure of the retail segment of FEFD pharmaceutical market in 1 Q 2022–1 Q 2023

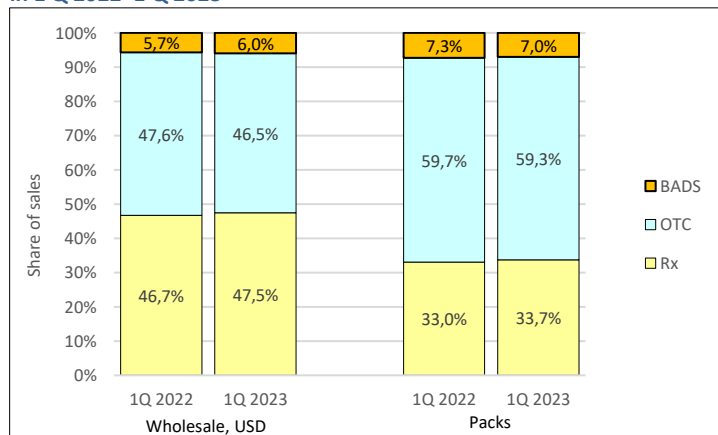
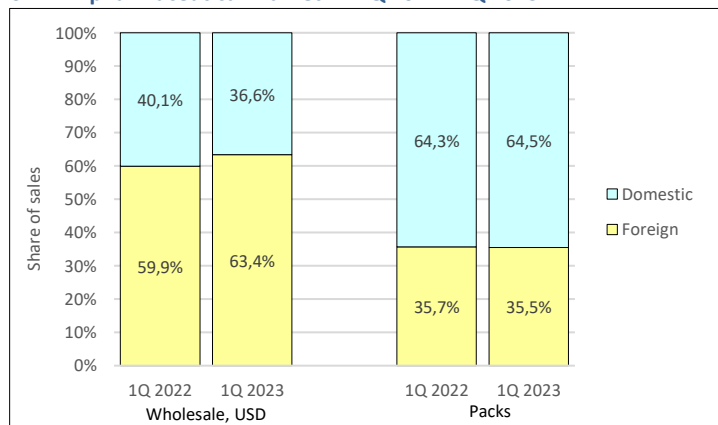


Figure 6. Movement of the Russian/ foreign drugs share in the structure of FEFD pharmaceutical market in 1 Q 2022–1 Q 2023



* Here and elsewhere IQVIA's data are used