## MACROECONOMIC INDICES

Inflation

According to Federal State Statistics Service's data, the Consumer Price Index was estimated as 100.6% in July 2023 compared to the previous month, and 103.4% against December 2022.

In July 2023, Industrial Producer Price Index was 101.4% as compared to the previous month, in the month-earlier period it had amounted to 100.0%. The index accounted for 110.5% as against December 2022.

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

Source: Rosstat
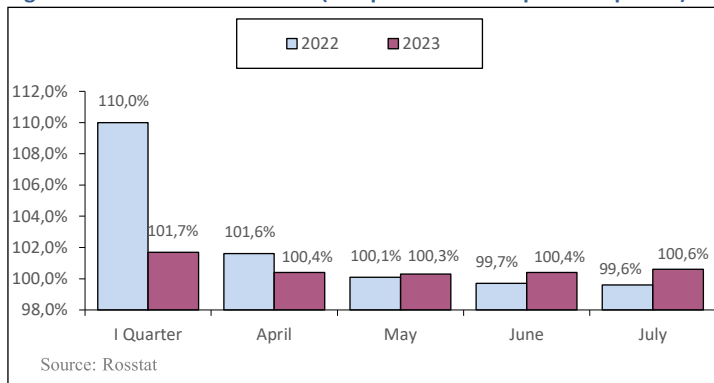
Living standard

In June 2023, a gross monthly average wage of corporate employees reached RUB 76604 (USD 847.20). It increased by 114.1% as compared to June 2022, and 105.2% as compared to the previous period. In June 2023, the real gross wage accounted for 110.5% as compared to June 2022, and 104.8% against the prior period.

According to estimates[1], real disposable cash incomes decreased by 104.7% in the first half of 2023 as compared to the first half of 2022 (Fig. 2).

Retail turnover

In July 2023, the retail turnover was equal to RUB 3999.0 bil. or 110.5% (in comparable prices) against the respective period of the previous year, and RUB 25692.5 bil. or 102.4% in January - July 2023 (Fig. 2).

Figure 2. Real wage and retail turnover

Source: Rosstat

* In January-June 2023 vs January-June 2022

Industrial Production

According to Federal State Statistics Service's data, in July 2023 Industrial Production Index accounted for 104.9% as compared to the same period in the previous year, and 102.6% in January-July 2023.

According to Federal State Statistics Service's data, Industrial Production Index of drugs and medical products in July 2023 accounted for 104.3% compared to the relevant period of 2022 and 89.1% in January-July 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 July of 2023.

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

Rank	Manufacturer	RUB mil.
1	Biocad	3159.4
2	Binnopharm	2751.7
3	Stada	2748.9
4	Pharmstandard	2075.7
5	Otcpharm	2066.0
6	Servier	1878.0
7	Microgen	1595.4
8	Vertex	1521.0
9	Atoll	1457.0
10	Grotex	1405.9

Source: IQVIA

Table 2 provides pharmacy sales data from 10 regions of the Russian Federation. The growth in sales was reported in half of the regions in June 2023 as compared to May (in terms of roubles). The most pronounced growth in sales was in St. Petersburg (+8%). The most significant decrease in sales was observed in Krasnoyarsk Krai (-8%).

Table 2. Pharmacy sales in the regions, 2023

Region	Pharmacy sales, $ mil. (Wholesale prices)			Growth gain, % (roubles)		
	April 2023	May 2023	June 2023	April/March 23	May/ April 23	June/ May 23
Moscow	157.5	165.3	162.5	-24%	2%	4%
St. Petersburg	72.4	77.7	79.5	-25%	5%	8%
Krasnodar Krai	56.6	60.4	52.8	-14%	4%	-8%
Krasnoyarsk Krai	26.8	27.2	24.7	-12%	-1%	-4%
Tatarstan	26.5	27.4	26.3	-13%	1%	1%
Rostov Region	30.3	33.9	30.9	-18%	9%	-4%
Novosibirsk Region	26.0	27.0	27.5	-16%	1%	7%
Voronezh Region	19.4	21.5	20.7	-25%	8%	1%
Perm	8.3	7.9	7.2	-13%	-7%	-4%
Tyumen	9.7	9.9	9.2	-12%	-0.4%	-1%

Advertising

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

Table 3. The Top 5 advertisers in mass media in July 2023

Rank	Company*	Amount of broadcasts
1	Otcpharm	6,689
2	PFK Renewal	6,118
3	Evalar	5,947
4	Dr. Reddy's Laboratories	2,835
5	Binnopharm Group	2,126

Source - Remedium according to Mediascope's data

Table 4. The Top 5 brands in mass media in July 2023

| Rank	Brand*	Amount of broadcasts
1	Renewal	6,118
2	Evalar	5,414
3	Pentalgin	3,180
4	Nalgesin	1,806
5	Dibicor	1,781

Source - Remedium according to Mediascope's data

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

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

RUSSIAN PHARMACY FPP DRUG MARKET: 2023 FIRST SIX MONTHS RESULTS

According to the results of the Retail Audit of FPP (Finished Pharmaceutical Products) in Russian Federation™, for the first six months of 2023 the national pharmacies sold 2,149 bil. drug packs, on top of that the market volume in physical terms reduced by 1% compared to the same period in 2022. In value terms, the market potential in January-June increased by 3% in rouble terms and by 2% in dollar terms and its volume amounted to RUB 575.638 bil. (USD 7.511 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 4.32 in the first half of 2023 vs USD 4.16 in 2022. Consumer spending for drugs in Russia averaged to USD 63.44 for 6 months of 2023, whereas during the same period a year ago it averaged to USD 62.19.

Figure 1. Russia pharmacy market for 3 months of 2022 – 6 months 2023*
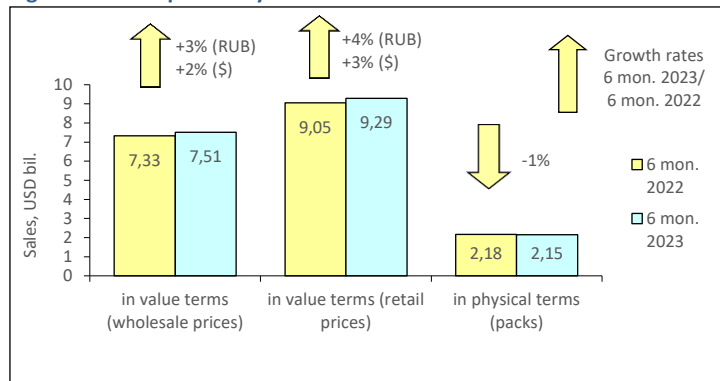
Based on the results for January-June 2023, BAYER (-9%[2]) и STADA (+4%) held their leading positions in the Top-10 manufacturers ranking in the Russian retail market despite the decline in sales and market share of the former (Table 1). The other manufacturers of the Top 10 ranking shifted their ranks; moreover, five of them rose in the ranks. SERVIER (+1%), KRKA (+8%) and TEVA (+6%) moved up to ranks three through five respectively, displacing SANOFI (-8%) and ABBOTT (+0.2%) one rank down. The newcomers BINNOPHARM (+31%) and GEDEON RICHTER (+8%) rounded out the Top 10 ranking. OTCPHARM reduced its sales by 23% and lost five rating points based on the results for half a year. The total share of the Top 10 reduced from 32% to 30.8%.

Table 1. The Top 10 drug manufacturers by pharmacy sales

Rank in the Top 10		Manufacturer*	Share in total pharmacy sales, %	
6 mon. 2023	6 mon. 2022		6 mon. 2023	6 mon. 2022
1	1	**BAYER**	4.2	4.8
2	2	**STADA**	3.9	3.9
3	4	**SERVIER**	3.2	3.3
4	7	**KRKA**	3.0	2.9
5	8	**TEVA**	2.9	2.9
6	5	**SANOFI**	2.9	3.3
7	6	**ABBOTT**	2.9	2.9
8	3	OTCPHARM	2.8	3.7
9	12	BINNOPHARM GROUP	2.5	2.0
10	11	GEDEON RICHTER	2.4	2.3
Total			30.8	32.0

*AIPM members are in bold

Three newcomers broke into the ranks of the Top 10 brands ranking (Table 2). EDARBI (+20%), PENTALGIN (+5%) and THERAFLU (-2%) moved up to ranks six, eight and nine. In addition to them, the other five brands of the Top 10 moved up to yet higher ranks. Four of them, ELIQUIS (-18%), DETRALEX (+0,5%), NUROFEN (-5%) and HEPTRAL (+3%) moved up to ranks two through five, respectively. MEXIDOL (-5%) moved two ranks up, coming in at number seven. XARELTO continued to remain the leader of the Top 10 rating, though its sales reduced by 18%. INGAVIRIN that showed the same growth rates moved four ranks down and rounded out the Top 10 ranking. In total, the Top 10 brands accounted for 6.6% of the sales, whereas in the year– earlier period they had accounted for 7.3%.

Table 2. The Top 10 brands by pharmacy sales

Rank in the Top 10		Brand	Share in total pharmacy sales, %	
6 mon. 2023	6 mon. 2022		6 mon. 2023	6 mon. 2022
1	1	XARELTO	1.1	1.3
2	3	ELIQUIS	0.9	1.2
3	4	DETRALEX	0.7	0.7
4	5	NUROFEN	0.7	0.7
5	7	HEPTRAL	0.6	0.6
6	14	EDARBI	0.6	0.5
7	9	MEXIDOL	0.5	0.6
8	12	PENTALGIN	0.5	0.5
9	11	THERAFLU	0.5	0.5
10	6	INGAVIRIN	0.5	0.6
Total			6.6	7.3

XYLOMETAZOLINE, which sales increased by 6%, held its previous rank number one in the Top 10 INNs and grouping names ranking (Table 3). They were followed by the more dynamic DIOSMIN*HESPERIDIN (+9%) and IBUPROFEN (+13%), which moved up to ranks two and three from four and six. INNs PANCREATIN (+7%) and HYALURONIC ACID (+28%) also showed positive growth rates and rose in the ranks, moving up to positions six and ten. NIMESULIDE (-1%) moved two ranks up, despite the reduction in sales. RIVAROXABAN and APIXABAN that reduced sales by 18%, in contrast, moved down to ranks four and seven, whereas BISOPROLOL (-6%) and ROSUVASTATIN (-5%) held their previous ranks eight and nine. The cumulative share of the Top 10 INNs under review decreased from 10.7% to 10.4%.

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

Rank		INN/Grouping name	Share in total pharmacy sales, %	
6 mon. 2023	6 mon. 2022		6 mon. 2023	6 mon. 2022
1	1	XYLOMETAZOLINE	1.5	1.5
2	4	DIOSMIN*HESPERIDIN	1.3	1.2
3	6	IBUPROFEN	1.2	1.1
4	3	RIVAROXABAN	1.1	1.3
5	7	NIMESULIDE	1.0	1.0
6	10	PANCREATIN	0.9	0.9
7	5	APIXABAN	0.9	1.2
8	8	BISOPROLOL	0.8	0.9
9	9	ROSUVASTATIN	0.8	0.9
10	13	HYALURONIC ACID	0.8	0.7
Total			10.4	10.7

In contrast to the above ratings, the Top 10 ATC - groups ranking changed its leader (Table 4). M01 Anti-inflammatory and antirheumatic products (+9%) moved up to rank one from two, displacing the less dynamic C09 Agents acting on the rennin-angiotensin system (+2%) one rank down. It should be noted that in addition to the leader, only six ATC groups from the Top 10 ranking managed to improve their positions. For example, G03 Sex hormones (+4%) and R01 Nasal preparations (+13%) moved two ranks up, coming in at numbers three and four. N02 Analgesics (+8%), N06 Psychoanaleptics (+9%) and C05 Vasoprotectives (+10%) moved one rank up, coming in at numbers six through eight respectively. The newcomer J01 Antibacterials for systemic use (+21%) broke into the Top 10 ranking, moving up to rank nine. At the same time, B01 Antithrombotic agents (-17%) and J05 Antivirals for systemic use (-26%) moved down to ranks five and ten of the ranking. Its consolidated share reduced from 38.1% to 37.5%.

Table 4. The Top 10 ATC groups by pharmacy sales

| Rank		ATC code	ATC group	Share in total pharmacy sales, %	
6 mon. 2023	6 mon. 2022			6 mon. 2023	6 mon. 2022
1	2	M01	ANTIINFLAMMATORY AND ANTIRHEUMATIC PRODUCTS	5.4	5.1
2	1	C09	AGENTS ACTING ON THE RENIN-ANGIOTENSIN SYSTEM	5.3	5.4
3	5	G03	SEX HORMONES AND MODULATORS OF THE GENITAL SYSTEM	3.9	3.8
4	6	R01	NASAL PREPARATIONS	3.9	3.5
5	3	B01	ANTITHROMBOTIC AGENTS	3.6	4.4
6	7	N02	ANALGESICS	3.5	3.3
7	8	N06	PSYCHOANALEPTICS	3.1	3.0
8	9	C05	VASOPROTECTIVES	3.0	2.9
9	11	J01	ANTIBACTERIALS FOR SYST USE	3.0	2.6
10	4	J05	ANTIVIRALS FOR SYSTEMIC USE	2.9	4.1
Total				37.5	38.1

Conclusion. In the first half of 2023, the retail pharmacy market of the country reached RUB 712.048 bil. (USD 9.290 bil). As compared with the same period of 2022, the growth rates were positive both (+4%) in terms of roubles, and in terms of dollars (+3%). In pack terms, the market reduced by 1% compared to the prior year and amounted to 2.149 bil. packs. In January-June 2023, the average cost of an FPP pack in the national pharmacies was USD 4.32, whereas in the year-earlier period it was USD 4.16. 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 slightly increased as compared to 2022 (USD 63.44 vs. USD 62.19).

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* Here and elsewhere IQVIA's data are used

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

RUSSIAN FEDERATION HOSPITAL MARKET: 2023 FIRST SIX 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-June of 2023 the public procurement segment of the country in physical terms reduced by 21% as compared to the same period of the previous year and amounted to 159.371 mil. packs. In money terms, the market also showed negative growth rates both in terms of roubles (-11%) and in terms of dollars (-14%) and reached RUB 217.696 bil. (USD 2.832 mil.) at wholesale prices. In the first half of 2023, the average cost of an FPP pack in the public procurement sector of the country was USD 17.77, whereas in the year-earlier period its cost was USD 16.33.

Figure 1. Russia public sector for 6 months of 2022 – 6 months 2023*
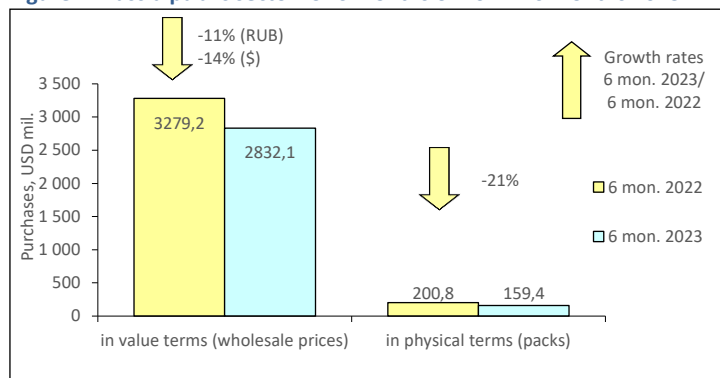
According to the results of the first six months of 2023, the top three manufacturers from the public procurement segment did not change in composition (Table 1). However, a shift took place in the Top 10 ranking: ROCHE (+19%) that showed positive growth rates moved up to rank number one from three, whereas MSD that hold that rank earlier reduced their purchases by 35% and moved down to rank three. BIOCAD (-24%) held its previous rank two. ASTRAZENECA (-23%) also kept its previous rank seven. Most of the remaining Top 10 manufacturers rose in the ranks. JOHNSON & JOHNSON (+65%) moved up to rank four from ten, whereas NOVARTIS (+9%) moved up to rank five from six. Three newcomers, MICROGEN (4.8-fold growth in purchases), PTC THERAPEUTICS (4.3-fold growth) and BAYER (-17%), moved up to ranks six and two bottom lines, respectively. At the same time, BRISTOL MYERS (-27%) moved three ranks down, coming in at number eight. In total, the Top 10 manufacturers accounted for 48.8% of the public procurement segment, which was almost 7 p.p. more than the year-earlier period figure.

Table 1. The Top 10 manufacturers by public segment volume

Rank in the Top 10		Manufacturer*	Share in total public segment, %	
6 mon. 2023	6 mon. 2022		6 mon. 2023	6 mon. 2022
1	3	**ROCHE**	9.4	7.1
2	2	BIOCAD RF	6.1	7.1
3	1	MSD	5.9	8.0
4	10	**JOHNSON & JOHNSON**	5.7	3.1
5	6	**NOVARTIS**	5.2	4.3
6	29	MICROGEN	3.8	0.7
7	7	**ASTRAZENECA**	3.7	4.2
8	5	BRISTOL MYERS SQU	3.6	4.3
9	32	PTC THERAPEUTICS	3.1	0.6
10	11	**BAYER**	2.4	2.6
Total			48.8	42.0

*AIPM members are in bold

The newcomers, SPINRAZA (3.8-fold growth in purchases) and TRANSLARNA (4.3-fold growth) that broke into the Top 10 for the first time, moved up to the top two lines from the second and third dozen and became the most demanded brands in the public procurement market of the country (Table 2). Another two newcomers SOVIGRIPP (1235-fold growth) and PEMBRORIA moved up to ranks four and nine, respectively. It should be noted that in addition to them, only one more brand managed to rise in the ranks: EVRYSDI (+78%) moved up to rank three from eight. At the same time, five brands of the Top 10 ranking, in contrast, moved down to the lower ranks. KEYTRUDA (-40%), OPDIVO (-29%), ZOLGENSMA (-5%) and PERJETA (-1%) that showed negative growth rates moved down to ranks five through eight, respectively. Despite positive growth rates, KADCYLA (+1%) lost three rating points. The total share of the Top 10 brands in the public procurement segment expanded by almost 10 p.p. from 16.0% to 25.6%.

Table 2. The Top 10 brands by public segment volume

Rank in the Top 10		Brand	Share in total public segment, %	
6 mon. 2023	6 mon. 2022		6 mon. 2023	6 mon. 2022
1	16	SPINRAZA	3.3	0.8
2	20	TRANSLARNA	3.1	0.6
3	8	EVRYSDI	3.0	1.5
4	47	SOVIGRIPP	3.0	0.0
5	1	KEYTRUDA	3.0	4.4
6	2	OPDIVO	2.8	3.5
7	3	ZOLGENSMA	2.1	1.9
8	6	PERJETA	1.9	1.7
9	N/A	PEMBRORIA	1.7	N/A
10	7	KADCYLA	1.7	1.5
Total			25.6	16.0

Three newcomers broke into the ranks of the Top 10 INN and grouping names ranking (Table 3). VACCINE, INFLUENZA (961-fold growth in purchases), NUSINERSEN (3.8-fold growth) and ATALUREN (4.3-fold growth) moved up to ranks two through four, respectively. They were followed by RISDIPLAM (+78%), which moved up to rank five and also improved its rating positions. INNs NIVOLUMAB (--29%), BEVACIZUMAB (+10%), ONASEMNOGENE ABEPARVOVEC (-5%), PERTUZUMAB (+1%) and TRASTUZUMAB EMTANSINE (+1%), in contrast, moved down to the bottom part of the Top 10 ranking from the higher positions. PEMBROLIZUMAB (-5%) kept its previous rank number one. The total share accumulated by the Top 10 INNs and grouping names accounted for 29.3%, whereas in the year-earlier period it was 18.0%.

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

Rank		INN/Grouping name	Share in total public segment, %	
6 mon. 2023	6 mon. 2022		6 mon. 2023	6 mon. 2022
1	1	PEMBROLIZUMAB	4.7	4.4
2	50	VACCINE, INFLUENZA	4.3	0.0
3	17	NUSINERSEN	3.3	0.8
4	22	ATALUREN	3.1	0.6
5	8	RISDIPLAM	3.0	1.5
6	2	NIVOLUMAB	2.8	3.5
7	3	BEVACIZUMAB	2.4	2.0
8	4	ONASEMNOGENE ABEPARVOVEC	2.1	1.9
9	6	PERTUZUMAB	1.9	1.7
10	7	TRASTUZUMAB EMTANSINE	1.7	1.5
Total			29.3	18.0

The leader of the Top 10 ATC-groups ranking also managed to hold its own in the ranking: L01 Antineoplastic agents (+3%) kept and reinforced its first position. The remaining ATC groups from the Top 10 ranking shifted their ranks; most of them rose in the ranks. Thus, M09 Other drugs for disorders of the musculo-skeletal system (2.1-fold growth) and J07 Vaccines (2.8-fold growth) increased their purchases by more than two times, moving up to ranks two and four, respectively. The less dynamic B05 Blood substitutes and perfusion solutions (+4%), L02 Endocrine therapy (+18%) and A16 Other alimentary tract and metabolism products (+29%) moved up to ranks six through eight, respectively. On top of that, the last group, A16, broke into the ranking for the first time. J01 Antibacterials for systemic use moved one rank up, to number five, despite 30% reduction in purchases. At the same time, three groups with strong negative growth rates, J05 Antivirals for systemic use (-58%), B01 Antithrombotic agents (-56%) and L04 Immunosuppressants (-74%) moved down to ranks three and two bottom ranks. The total share of the Top 10 ATC groups decreased by 1 p.p. to 80.9%.

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

Rank		ATC code	ATC group	Share in total public segment, %	
6 mon. 2023	6 mon. 2022			6 mon. 2023	6 mon. 2022
1	1	L01	ANTINEOPLASTIC AGENTS	33.6	29.0
2	5	M09	OTHER DRUGS FOR DISORDERS OF THE MUSCULO-SKELETAL SYSTEM	11.5	4.9
3	2	J05	ANTIVIRALS FOR SYSTEMIC USE	10.2	21.8
4	8	J07	VACCINES	9.3	3.0
5	6	J01	ANTIBACTERIALS FOR SYST USE	3.7	4.6
6	9	B05	BLOOD SUBSTITUTES AND PERFUSION SOLUTIONS	2.8	2.4
7	10	L02	ENDOCRINE THERAPY	2.6	2.0
8	11	A16	OTHER ALIMENTARY TRACT AND METABOLISM PRODUCTS	2.6	1.8
9	4	B01	ANTITHROMBOTIC AGENTS	2.5	5.1
10	3	L04	IMMUNOSUPPRESSANTS	2.1	7.2
Total				80.9	81.8

Conclusion. Based on the results for six months of 2023, the public procurement segment of Russia reduced by 11% in rouble terms and by 14% in dollar terms, and stood at RUB 217.696 bil. (USD 2.832 bil.). In natural terms, the public procurement segment decreased by 21% to 159.371 mil. packs. In the period under review, the average cost of a finished pharma product (FPP) pack in this sector of the country amounted to USD 17.77 vs. USD 16.33 in the year earlier period.


PHARMACEUTICAL MARKET OF THE CENTRAL FEDERAL DISTRICT (CFD) IN 1-2 Q 2023 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	January-June 2023	January-June (%) vs January-June 2022
Industrial production index		109.4
Retail turnover, RUB bil.	7,213.0	98.6
Monthly average accrued wage per worker (nominal), RUB	87,879	110.3
real		104.0

Note: CFD TOGS data

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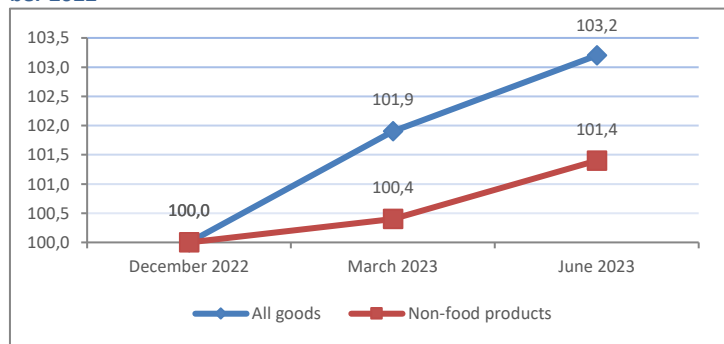
Indicators of movement of prices and retail margins (according to IQVIA data)

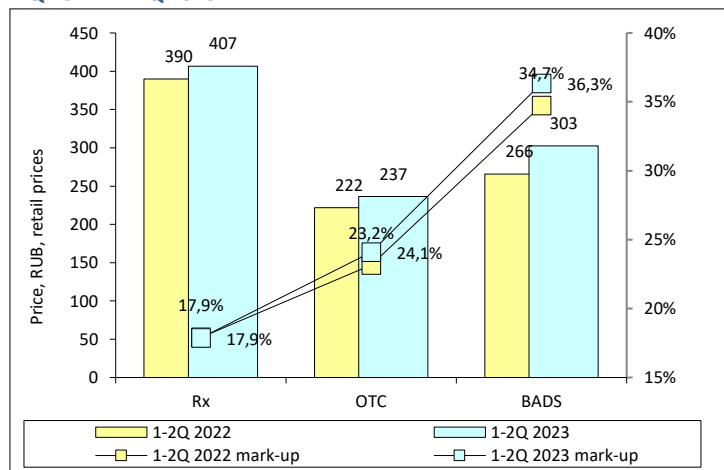**Figure 1. Movement of weighted average prices and retail margins in 1-2 Q 2022–1-2 Q 2023***
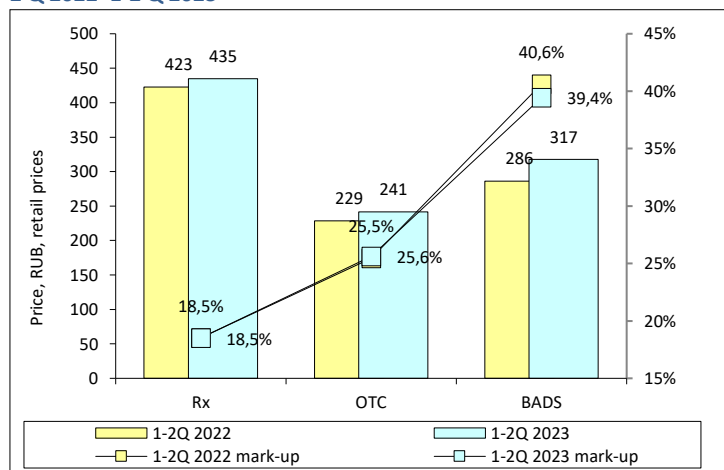
Figure 2. Movement of weighted average purchase prices in 1-2 Q 2022–1-2 Q 2023
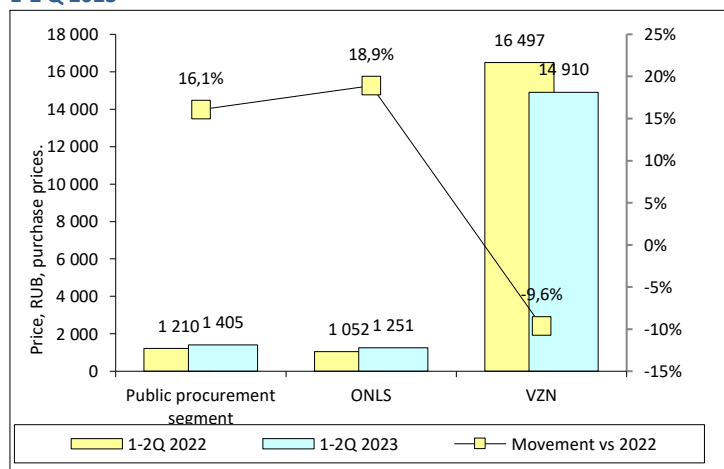
Indicators of the market movement and profile[3] (according to IQVIA data)

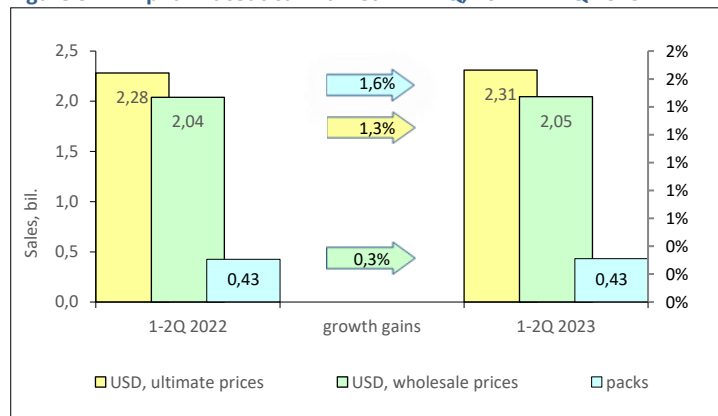**Figure 3. CFD pharmaceutical market in 1-2 Q, 2022–1-2 Q 2023**
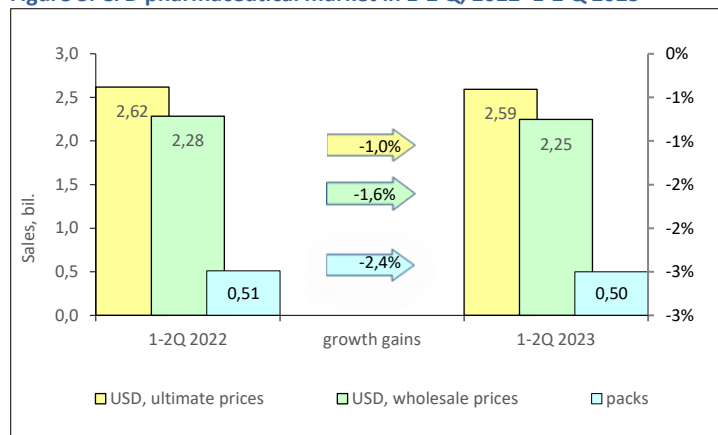
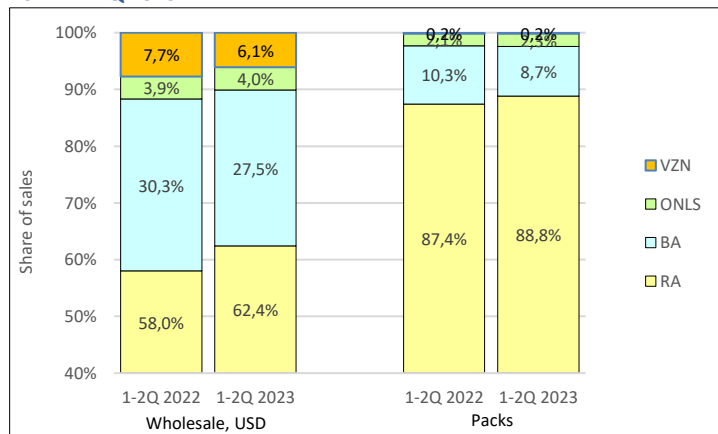**Figure 4. Major sector profile of CFD pharmaceutical market in 1-2 Q, 2022–1-2 Q 2023**
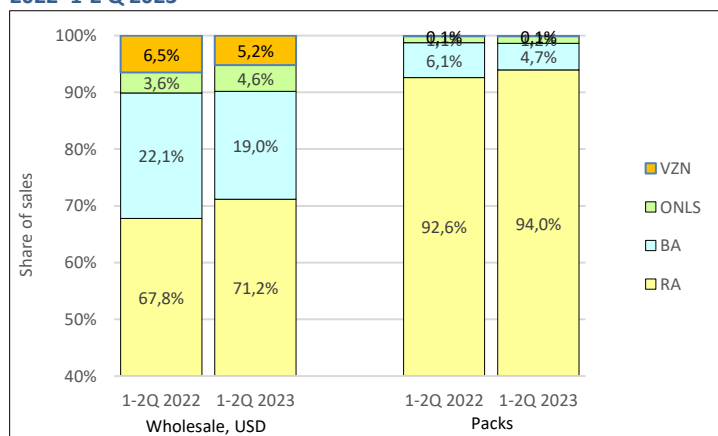
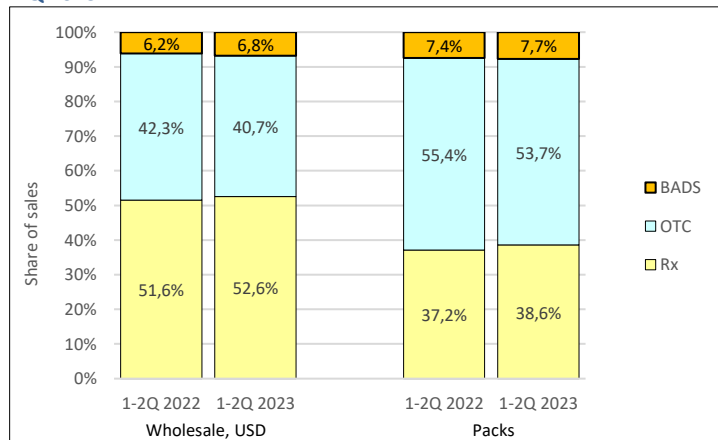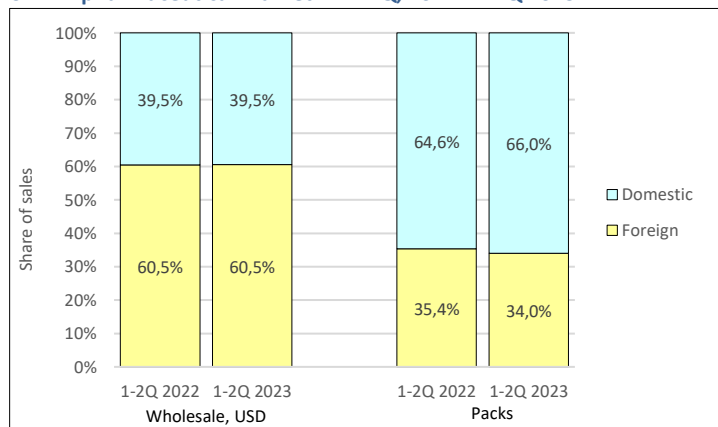**Figure 5. Structure of the retail segment of CFD market in 1-2 Q, 2022–1-2 Q 2023**
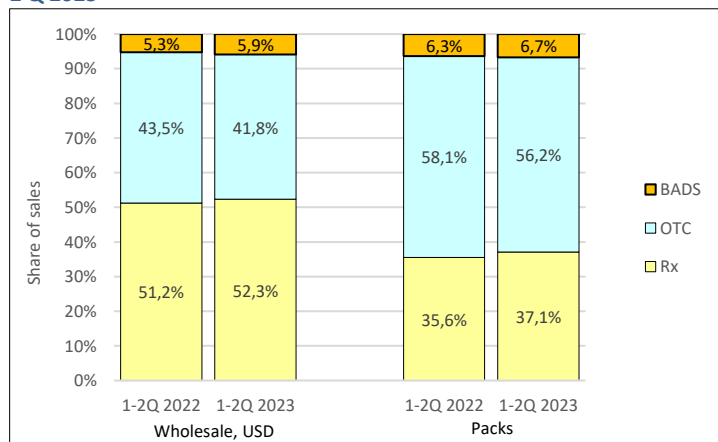
Figure 6. Movement of the Russian/foreign drugs share in the structure of CFD pharmaceutical market in 1-2 Q, 2022–1-2 Q 2023
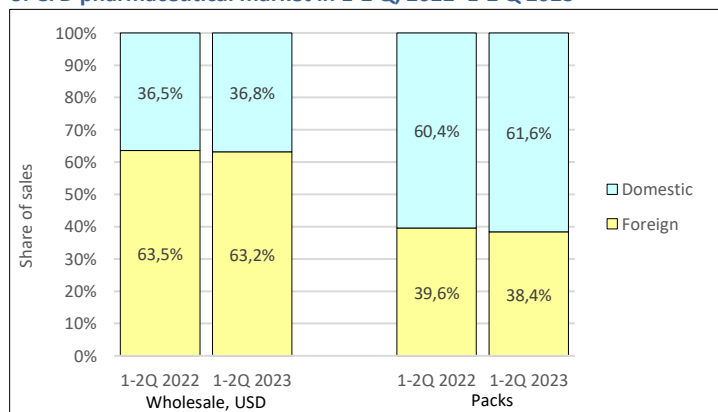
* Here and elsewhere IQVIA's data are used

[3] Exclusive of Moscow

PHARMACEUTICAL MARKET OF THE NORTH-WESTERN FEDERAL DISTRICT (NWFD) IN 1-2 Q 2023 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	January-June 2023	January-June (%) vs January-June 2022
Industrial production index		101.8
Retail turnover, RUB bil.	2,258.4	100.3
Monthly average accrued wage per worker (nominal), RUB	77,950	111.9
real		105.9

Note: NWFD TOGS data

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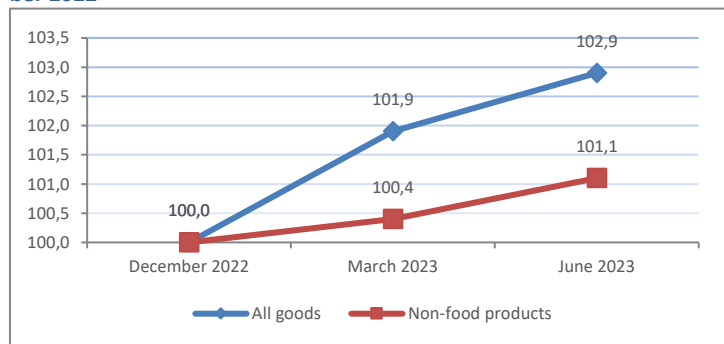
Indicators of movement of prices and retail margins (according to IQVIA data)

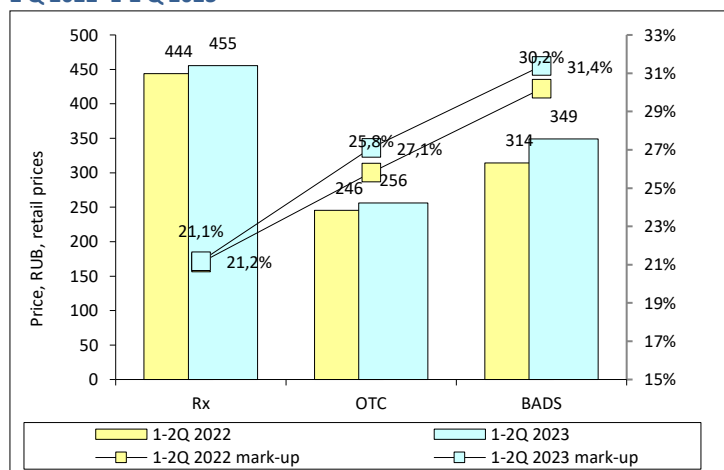### Figure 1. Movement of weighted average prices and retail margins in 1-2 Q 2022–1-2 Q 2023*
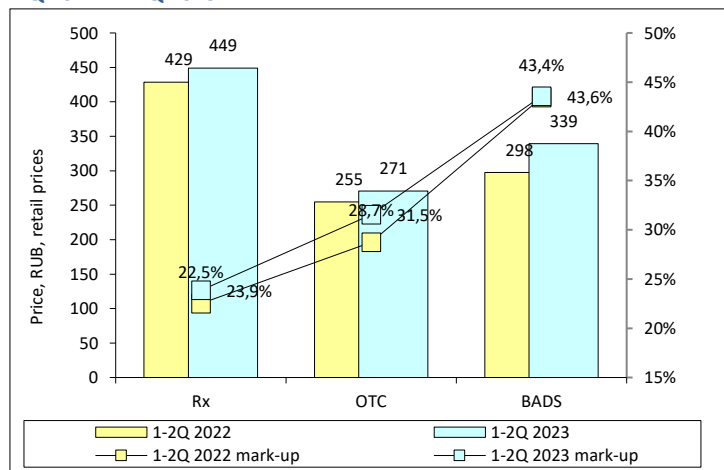
Figure 2. Movement of weighted average purchase prices in 1-2 Q 2022–1-2 Q 2023
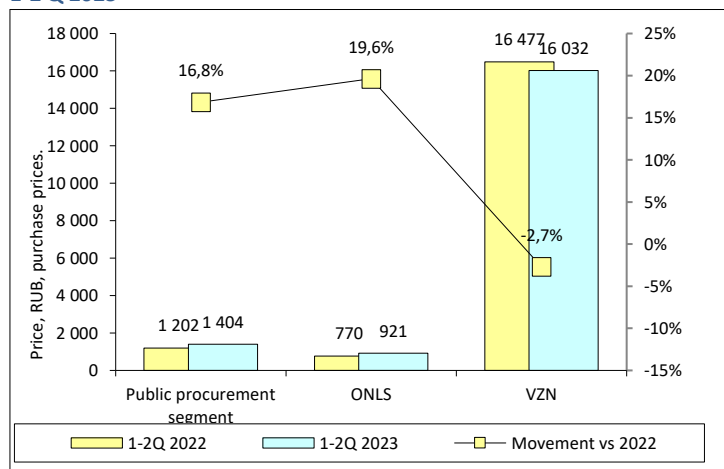
Indicators of the market movement and profile[4] (according to IQVIA data)

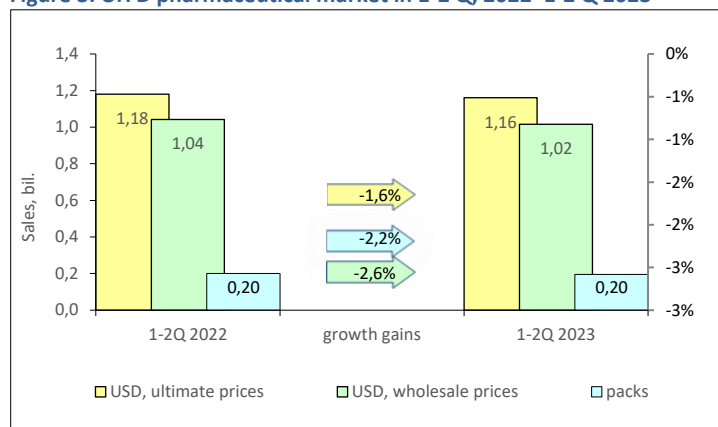### Figure 3. NWFD pharmaceutical market in Q 1-2, 2022–1-2 Q 2023
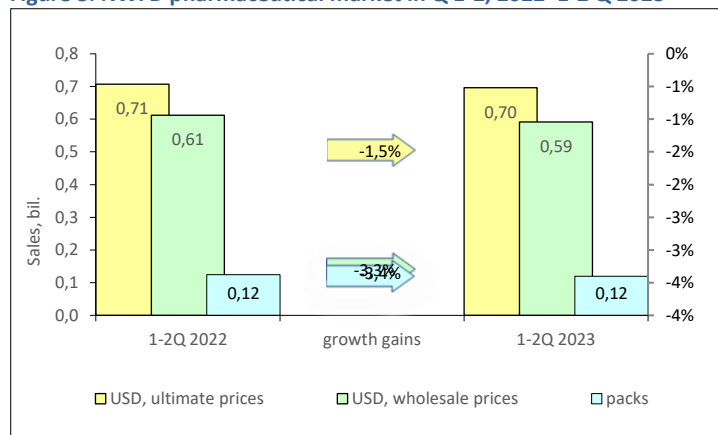
Figure 4. Major sector profile of NWFD pharmaceutical market in 1-2 Q, 2022–1-2 Q 2023
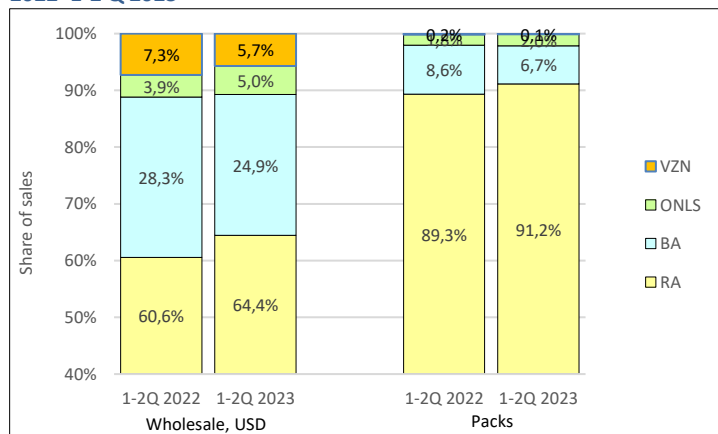
Figure 5. Structure of the retail segment of NWFD pharmaceutical market in 1-2 Q, 2022–1-2 Q 2023
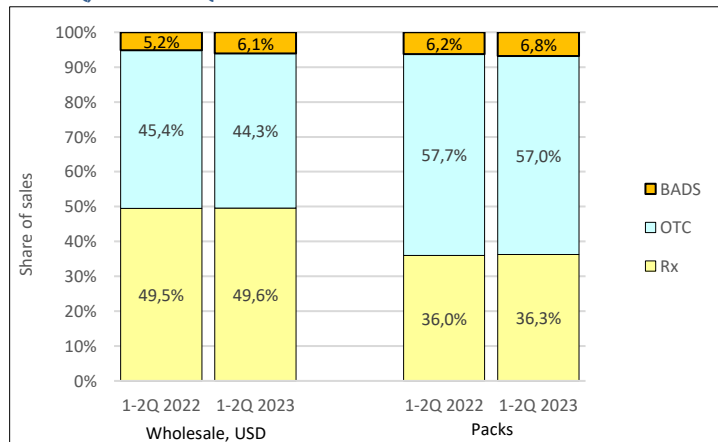
Figure 6. Movement of the Russian/ foreign drugs share in the structure of NWFD pharmaceutical market in 1-2 Q, 2022–1-2 Q 2023

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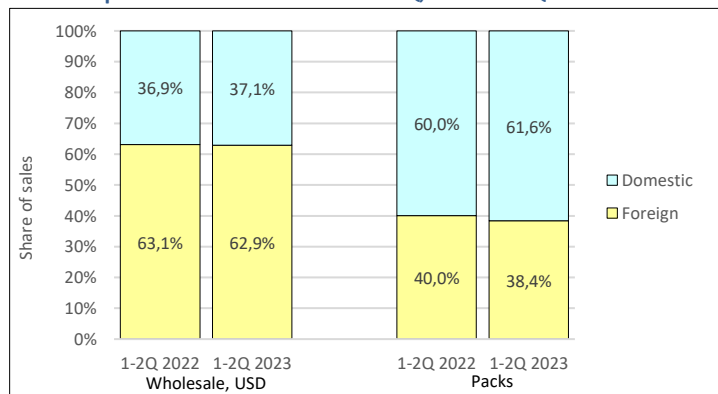
* Here and elsewhere IQVIA's data are used

[4] Exclusive of St. Petersburg

PHARMACEUTICAL MARKET OF THE VOLGA FEDERAL DISTRICT (VFD) IN 1-2 Q 2023 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	January-June 2023	January-June (%) vs January-June 2022
Industrial production index		105.4
Retail turnover, RUB bil.	3,790.9	105.0
Monthly average accrued wage per worker (nominal), RUB	51,814	116.2
real		110.7

Note: VFD TOGS data

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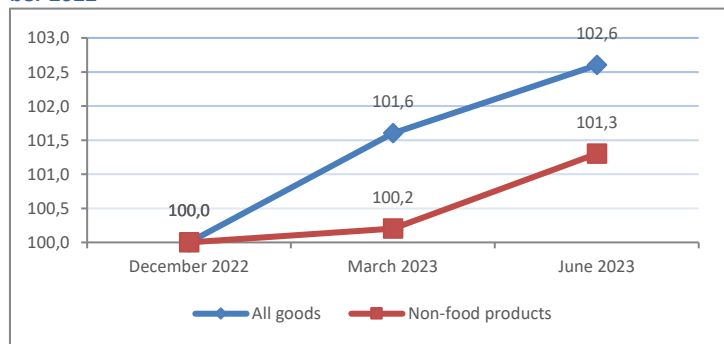
Indicators of movement of prices and retail margins (according to IQVIA data)

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

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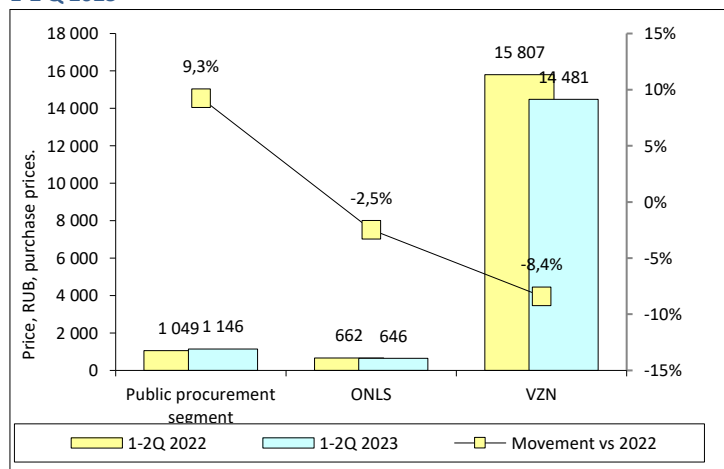
Indicators of the market movement and profile (according to IQVIA data)

Figure 3. VFD pharmaceutical market in 1-2 Q, 2022–1-2 Q 2023

Figure 4. Major sector profile of VFD pharmaceutical market in 1-2 Q, 2022–1-2 Q 2023
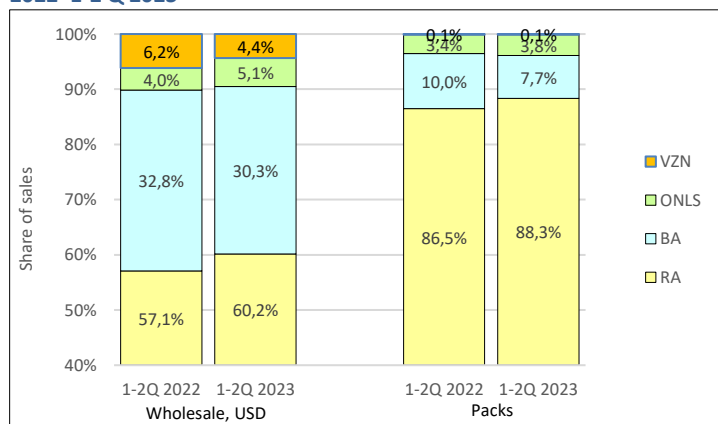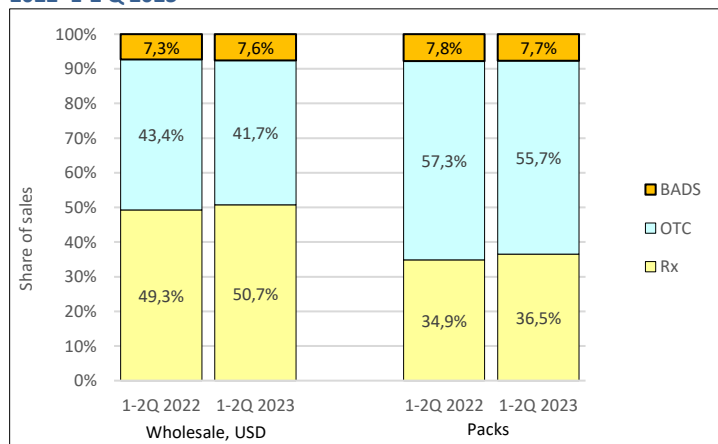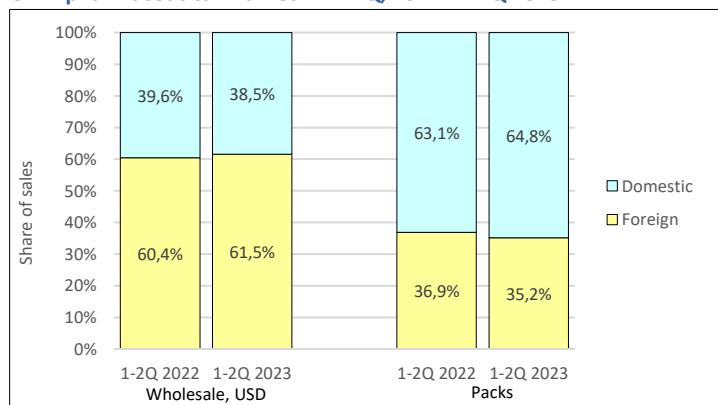

Figure 5. Structure of the retail segment of VFD market in 1-2 Q, 2022–1-2 Q 2023

Figure 6. Movement of the Russian/foreign drugs share in the structure of VFD pharmaceutical market in 1-2 Q, 2022–1-2 Q 2023

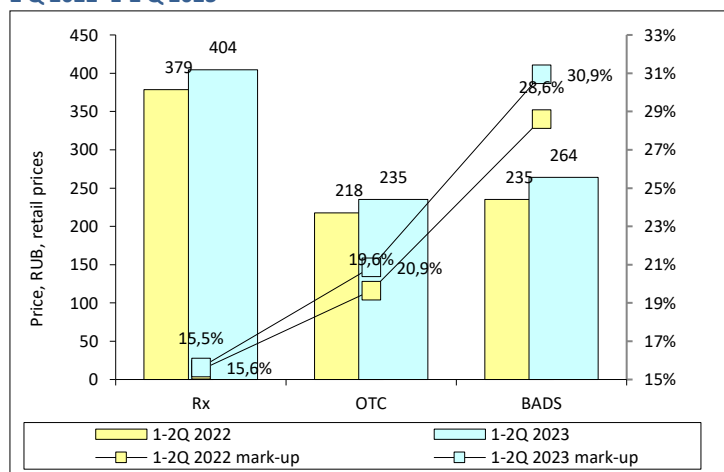
* Here and elsewhere IQVIA's data are used

PHARMACEUTICAL MARKET OF THE URAL FEDERAL DISTRICT (UFD) IN 1-2 Q 2023 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	January-June 2023	January-June (%) vs January-June 2022
Industrial production index		100.8
Retail turnover, RUB bil.	1,759.1	106.0
Monthly average accrued wage per worker (nominal), RUB	74,699	113.8
real		109.3

Note: VFD TOGS data

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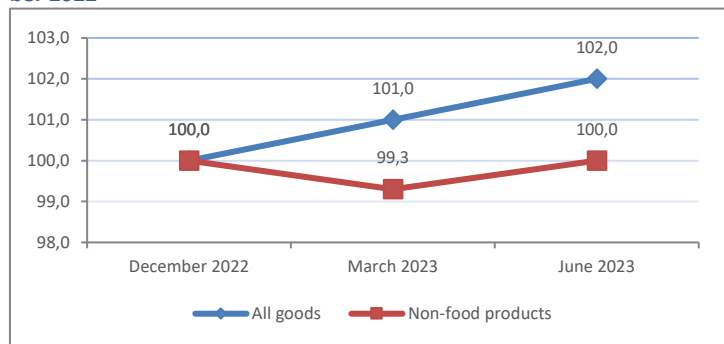
Indicators of movement of prices and retail margins (according to IQVIA data)

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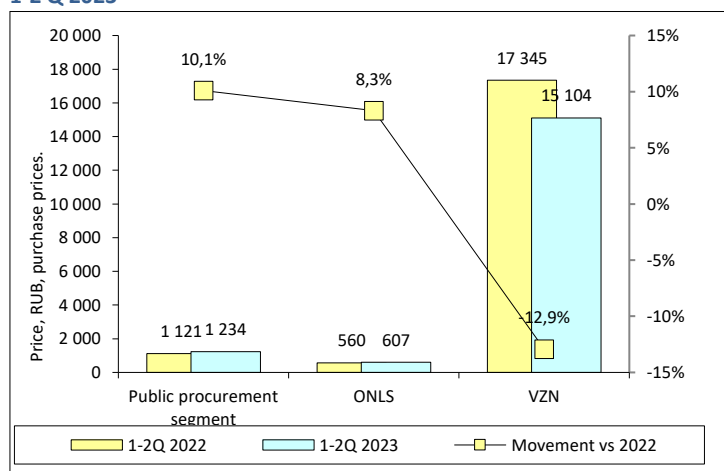

Figure 2. Movement of weighted average purchase prices in 1-2 Q 2022–1-2 Q 2023
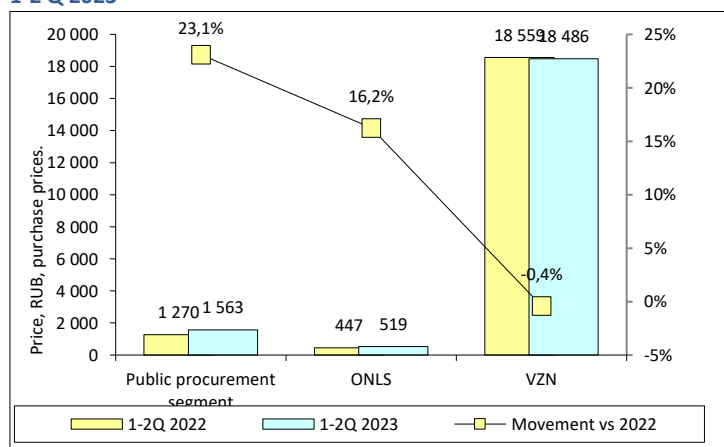
Indicators of the market movement and profile (according to IQVIA data)

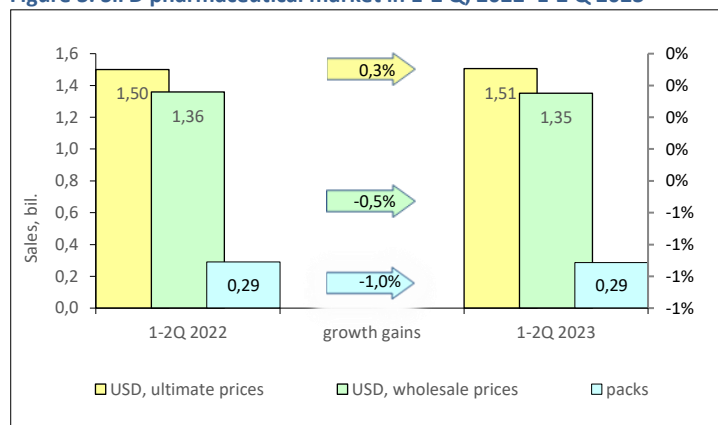## Figure 3. UrFD pharmaceutical market in 1-2 Q, 2022–1-2 Q 2023

Figure 4. Major sector profile of UFD pharmaceutical market in 1-2 Q, 2022–1-2 Q 2023
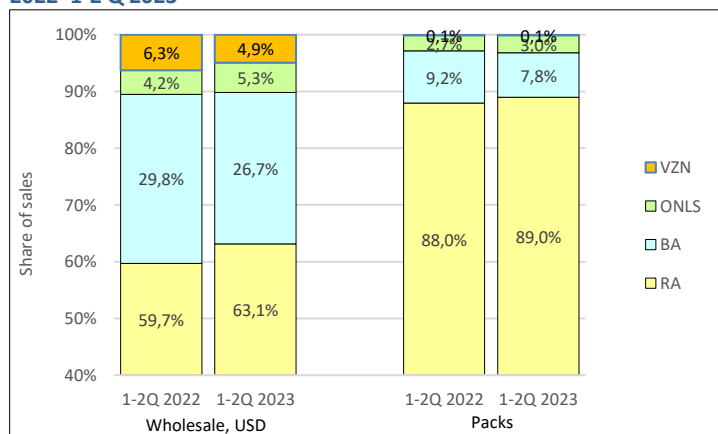

Figure 5. Retail sector profile of UrFD pharmaceutical market in 1-2 Q, 2022–1-2 Q 2023
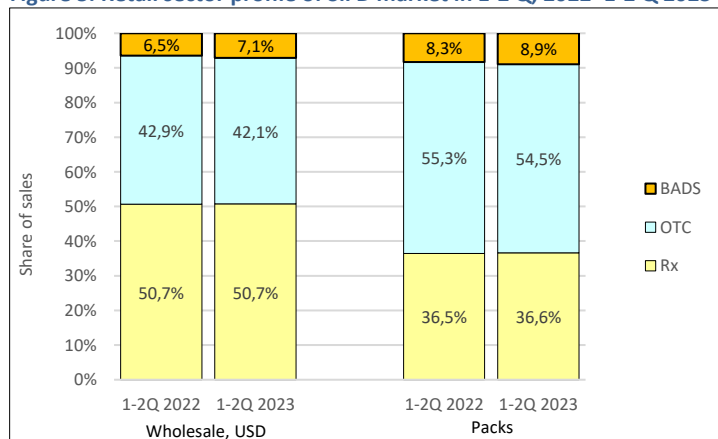

Figure 6. Movement of the Russian/foreign drugs share in the profile of UrFD pharmaceutical market in 1-2 Q, 2022–1-2 Q 2023

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*Here and elsewhere IQVIA's data are used

PHARMACEUTICAL MARKET OF THE SIBERIAN FEDERAL DISTRICT (SiFD) IN 1-2 Q 2023 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	January-June 2023	January-June (%) vs January-June 2022
Industrial production index		99.9
Retail turnover, RUB bil.	1,977.9	103.3
Monthly average accrued wage per worker (nominal), RUB	62,154	114.9
real		109.4

Note: SiFD TOGS data

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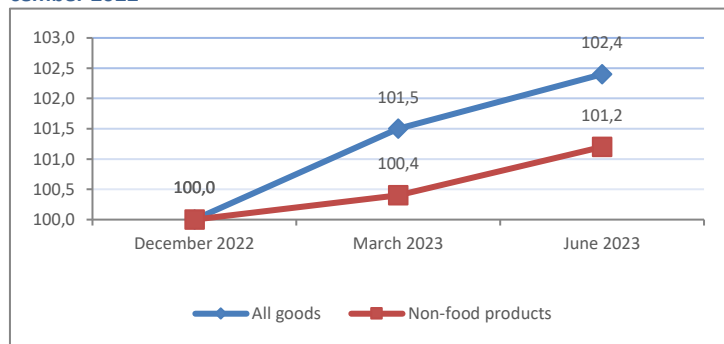
Indicators of movement of prices and retail margins (according to IQVIA data)

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

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

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

Figure 3. SiFD pharmaceutical market in 1-2 Q, 2022–1-2 Q 2023

Figure 4. Major sector profile of SiFD pharmaceutical market in 1-2 Q, 2022–1-2 Q 2023

Figure 5. Retail sector profile of SiFD market in 1-2 Q, 2022–1-2 Q 2023

Figure 6. Movement of the Russian/foreign drugs share in the profile of SiFD pharmaceutical market in 1-2 Q, 2022–1-2 Q 2023

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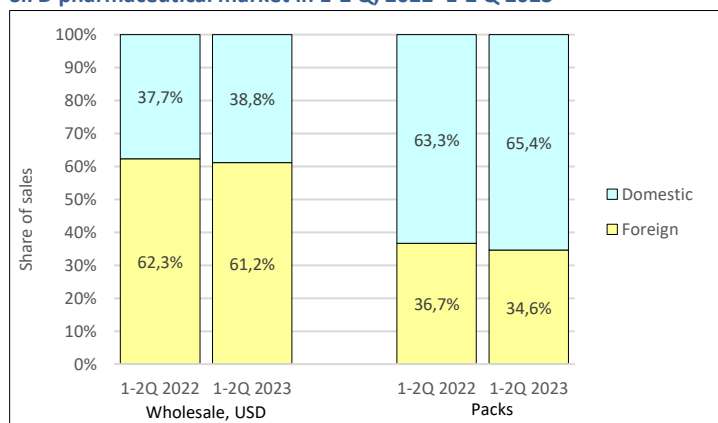
* Here and elsewhere IQVIA's data are used

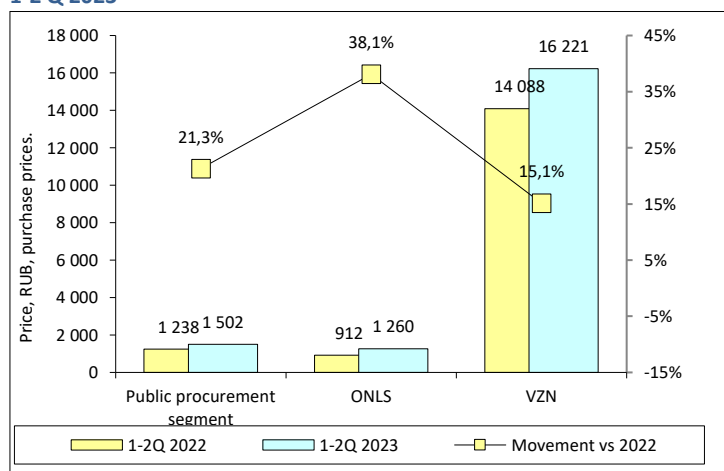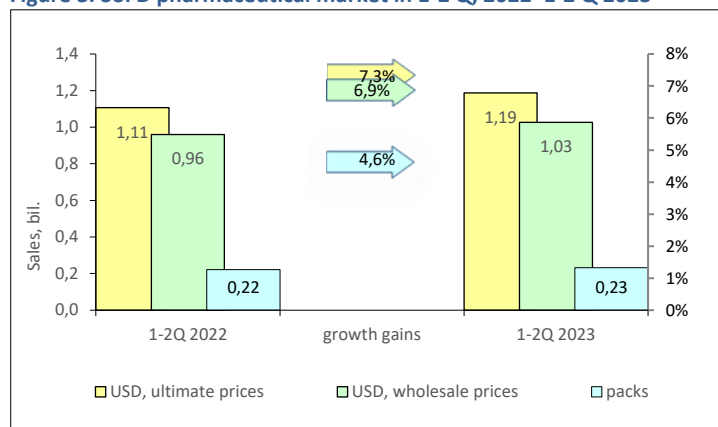# PHARMACEUTICAL MARKET OF THE SOUTHERN FEDERAL DISTRICT (SoFD) IN 1-2 Q 2023 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	January-June 2023	January-June (%) vs January-June 2022
Industrial production index		102.7
Retail turnover, RUB bil.	2,446.4	105.5
Monthly average accrued wage per worker (nominal), RUB	49,502	114.6
real		108.3

Note: SoFD TOGS data

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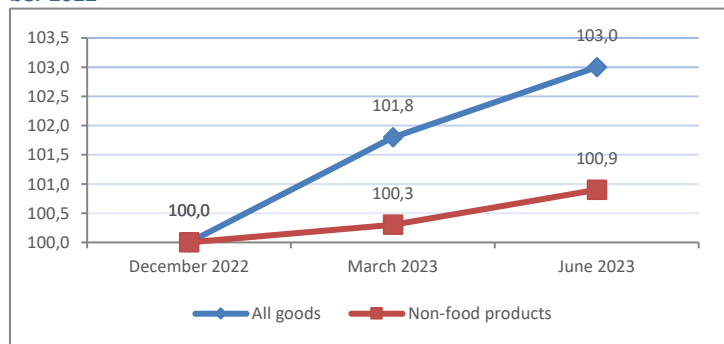
Indicators of movement of prices and retail margins (according to IQVIA data)

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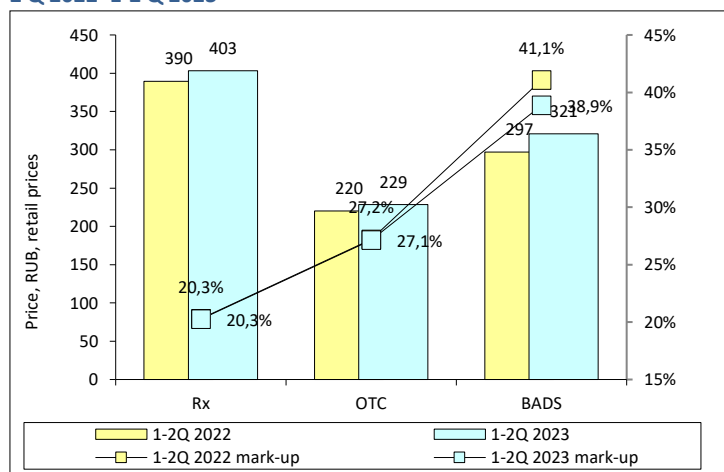
Figure 2. Movement of weighted average purchase prices in 1-2 Q 2022–1-2 Q 2023

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

Figure 3. SoFD pharmaceutical market in 1-2 Q, 2022–1-2 Q 2023

Figure 4. Major sector profile of SoFD pharmaceutical market in 1-2 Q, 2022–1-2 Q 2023
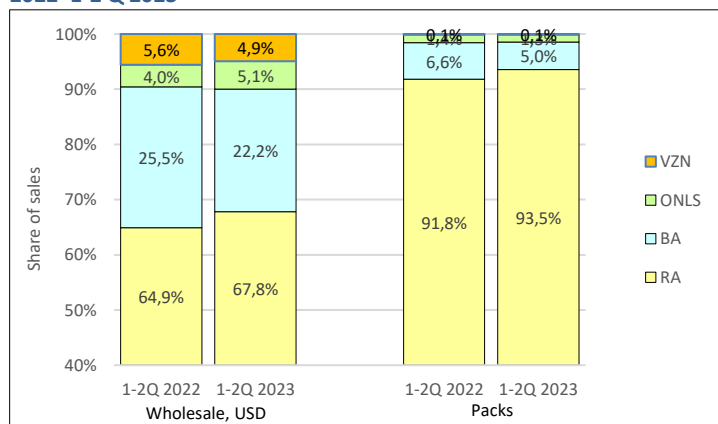

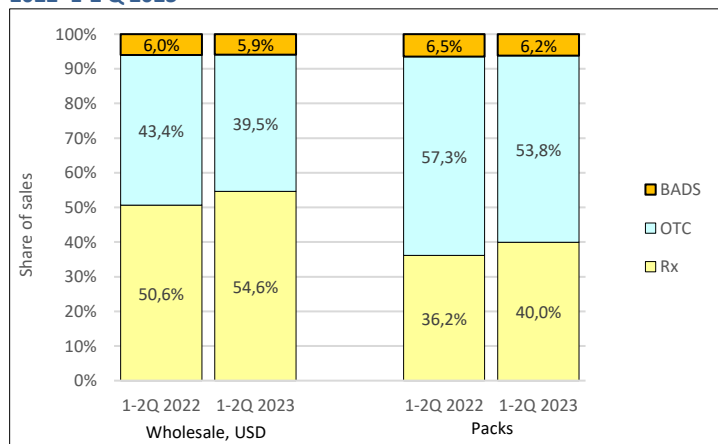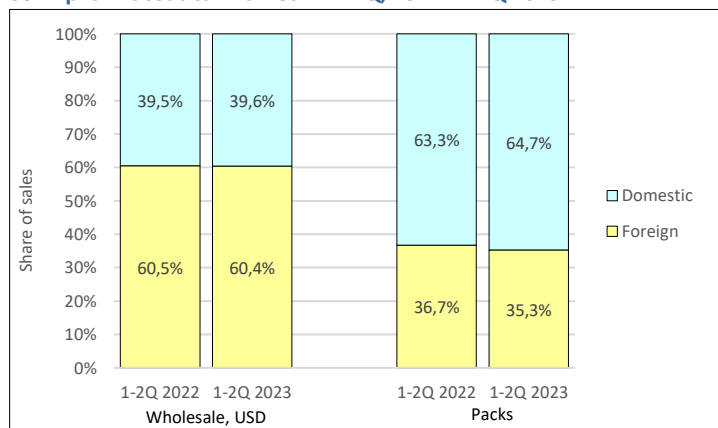### Figure 5. Retail sector profile of SoFD pharmaceutical market in 1-2 Q, 2022–1-2 Q 2023

Figure 6. Movement of the Russian/foreign drugs share in the profile of SoFD pharmaceutical market in 1-2 Q, 2022–1-2 Q 2023

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* Here and elsewhere IQVIA's data are used

PHARMACEUTICAL MARKET OF THE FAR EASTERN FEDERAL DISTRICT (FEFD) IN 1-2 Q 2023 KEY PERFORMANCE INDICATORS

Macroeconomic indices

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

Value	January-June 2023	January-June (%) vs January-June 2022
Industrial production index		99.9
Retail turnover, RUB bil.	1,213.2	100.7
Monthly average accrued wage per worker (nominal), RUB	79,631	111.4
real		104.9

Note: FEFD TOGS data

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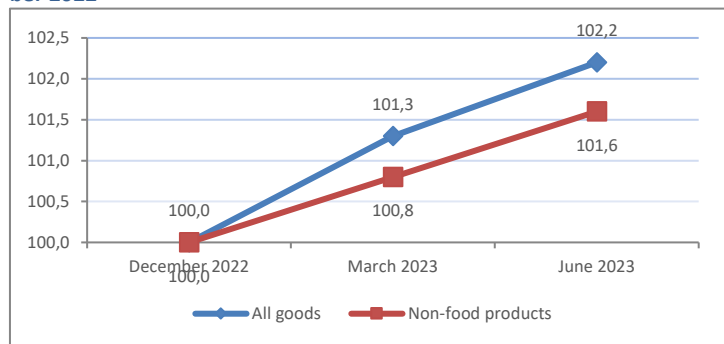
Indicators of movement of prices and retail margins (according to IQVIA data)

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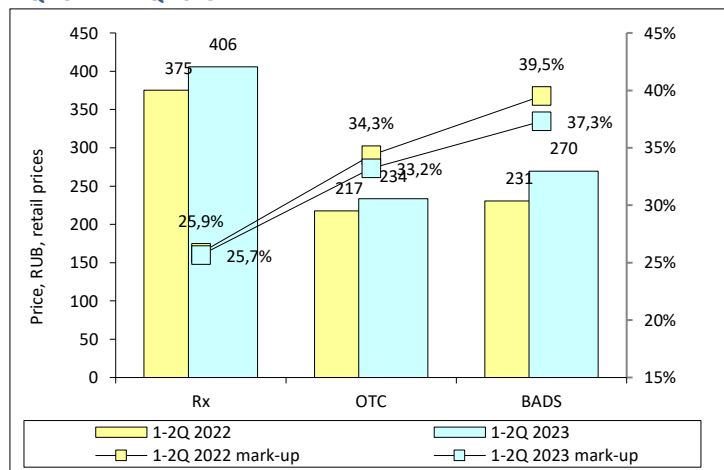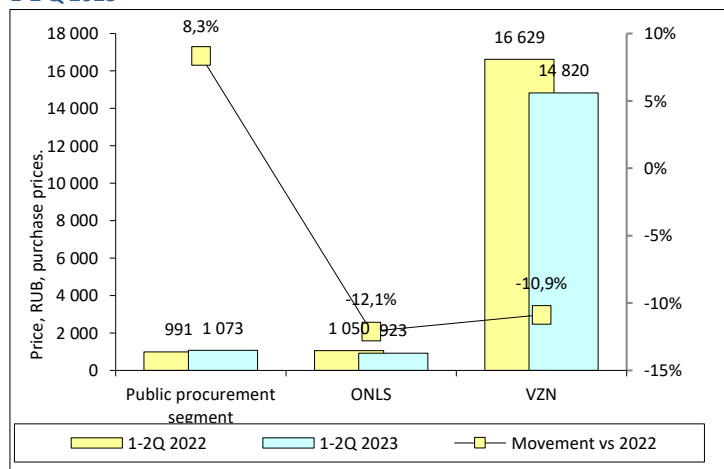

Figure 2. Movement of weighted average purchase prices in 1-2 Q 2022–1-2 Q 2023

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

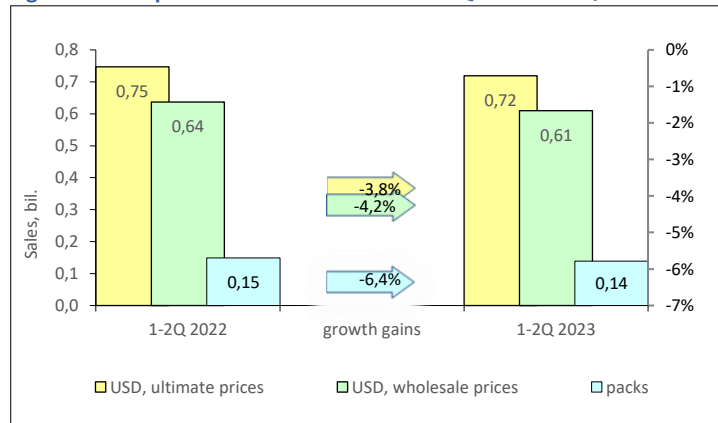### Figure 3. FEFD pharmaceutical market in 1-2 Q, 2022–1-2 Q 2023

Figure 4. Major sector profile of FEFD pharmaceutical market in 1-2 Q, 2022–1-2 Q 2023
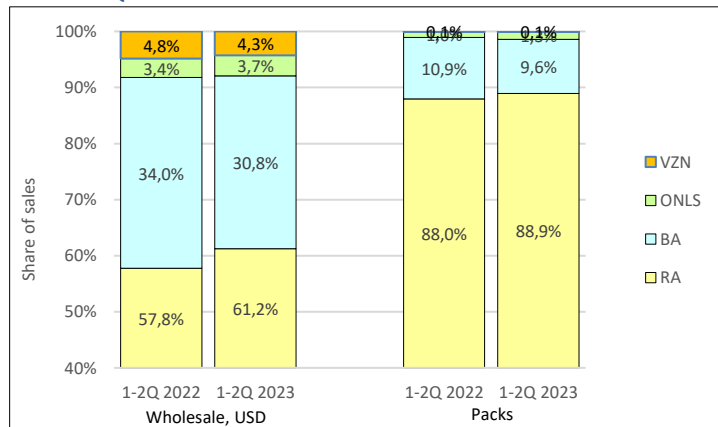

Figure 5. Retail sector profile of FEFD pharmaceutical market in 1-2 Q, 2022–1-2 Q 2023
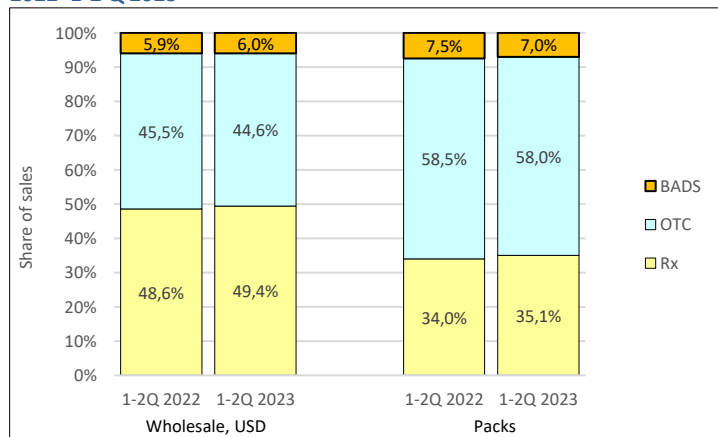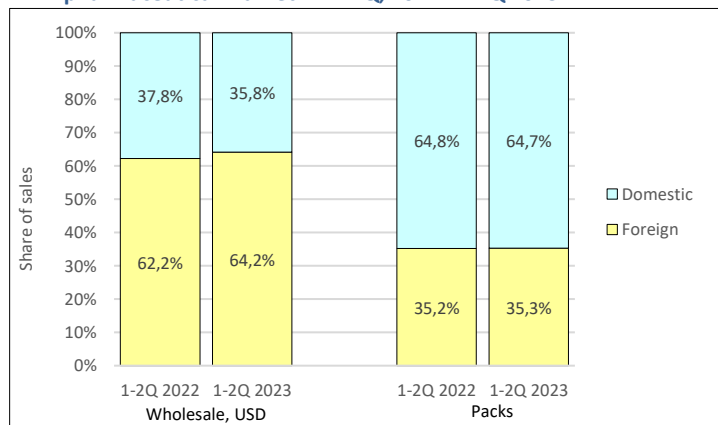

Figure 6. Movement of the Russian/foreign drugs share in the profile of FEFD pharmaceutical market in 1-2 Q, 2022–1-2 Q 2023

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* Here and elsewhere IQVIA's data are used