IQDATA FOCUS

IQDATA Focus

Analytics. Innovation. Accuracy.

January 2026



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Content

- Macro-economic indicators
- Total pharma market
- Retail segment
- State-funded segment

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The following definitions are used in the existing IQDATA report

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TIME PERIOD

Analyzed period of this report:

- February 2025 – January 2026

We apply MAT (Moving Annual Total) for comparison analysis

YoY: year over year growth

CAGR: compound annual growth rate

VALUES

VALUE – Rubles

VOLUME – Packs

Trade price (sell-in to pharmacies and hospitals)

MARKET

Total pharma market (all product categories including Z98 food supplements)

Source (IQDATA audits):

- Retail audit of drugs in RF
- Public audit of drugs in RF (excluding DLO and RLO)
- RLO and DLO (excluding sales of ATC2 EphMRA2 groups T02, T03)

CHANNELS

Retail channel (out-of-pocket market)

State-funded channel (all products are reimbursed) covers Public (excluding DLO/RLO), RLO, DLO

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Macro-economic indicators



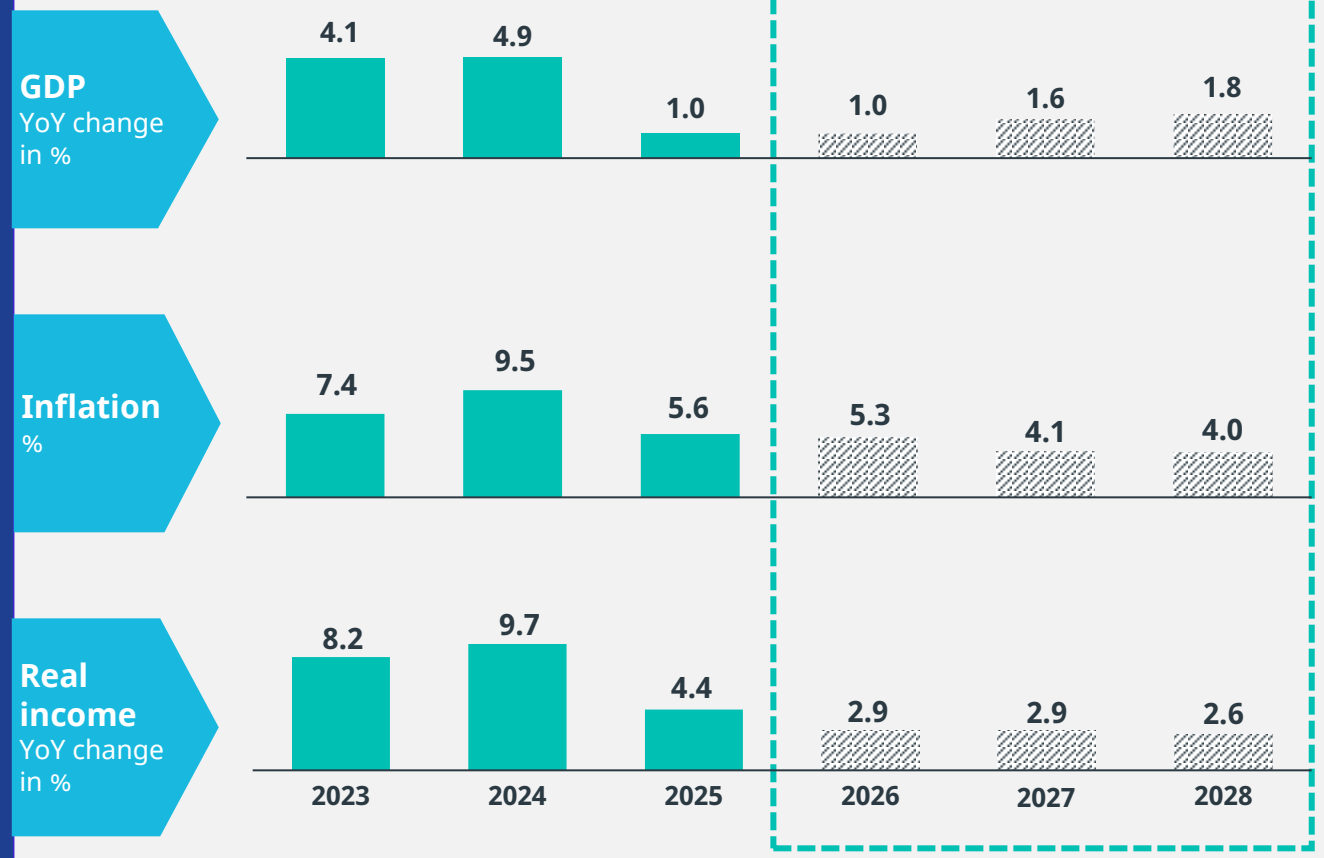
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Updated quarterly

In 2025 Russia's GDP growth rate fell sharply to 1%, in 2026-2028 economic growth is not expected to accelerate

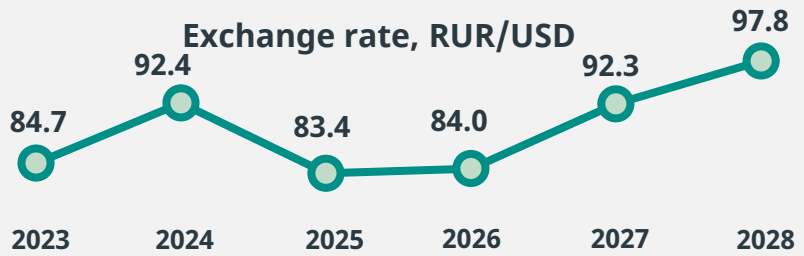
Key economic indicators

Economic indicators



Comments

- The **GDP forecast** for 2026 is **1%**. **Real income** is expected to grow by **2.9%** in 2026
- The **inflation rates** in 2026 and subsequent periods **are projected at 4–5.3%**
- **Uncertainty remains** around several developments: **inflation** resilience and **monetary tightening**, **demand** dynamics and **global supply chain strains**, food and energy market volatility, large stocks of debt and **geopolitical tensions**



Economy

Source: IQDATA analysis, Макроэкономический опрос Банка России | Банк России (March 2026 update)

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Total pharma market

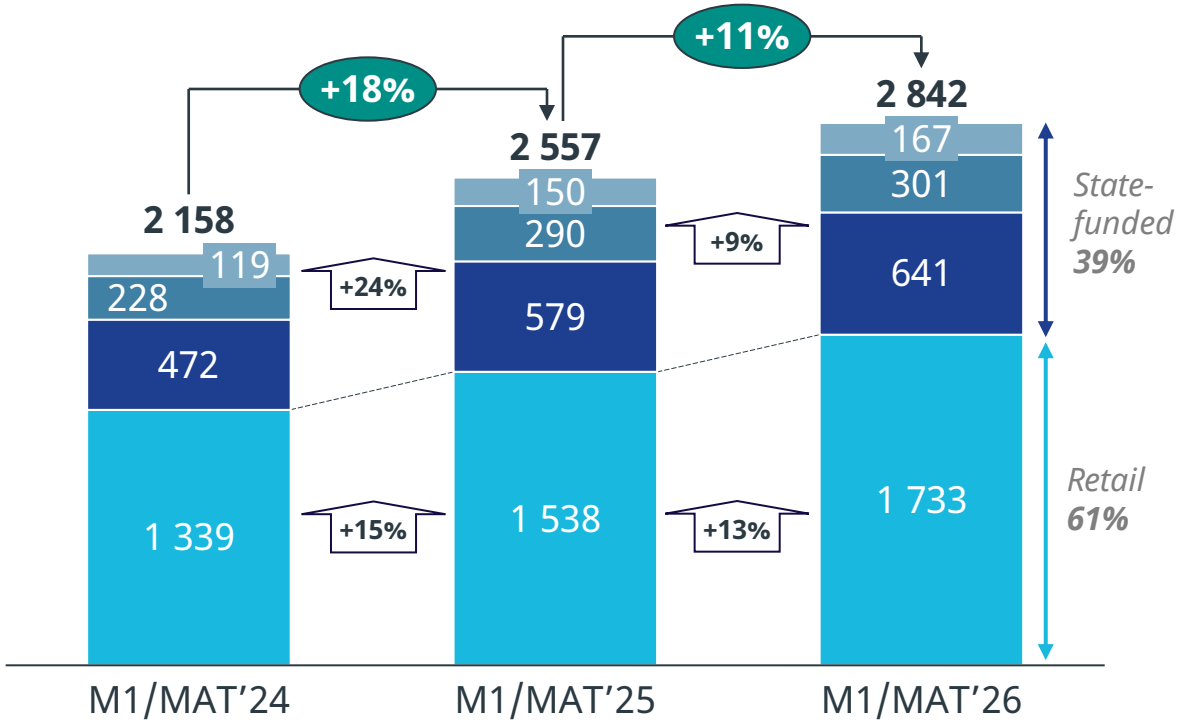


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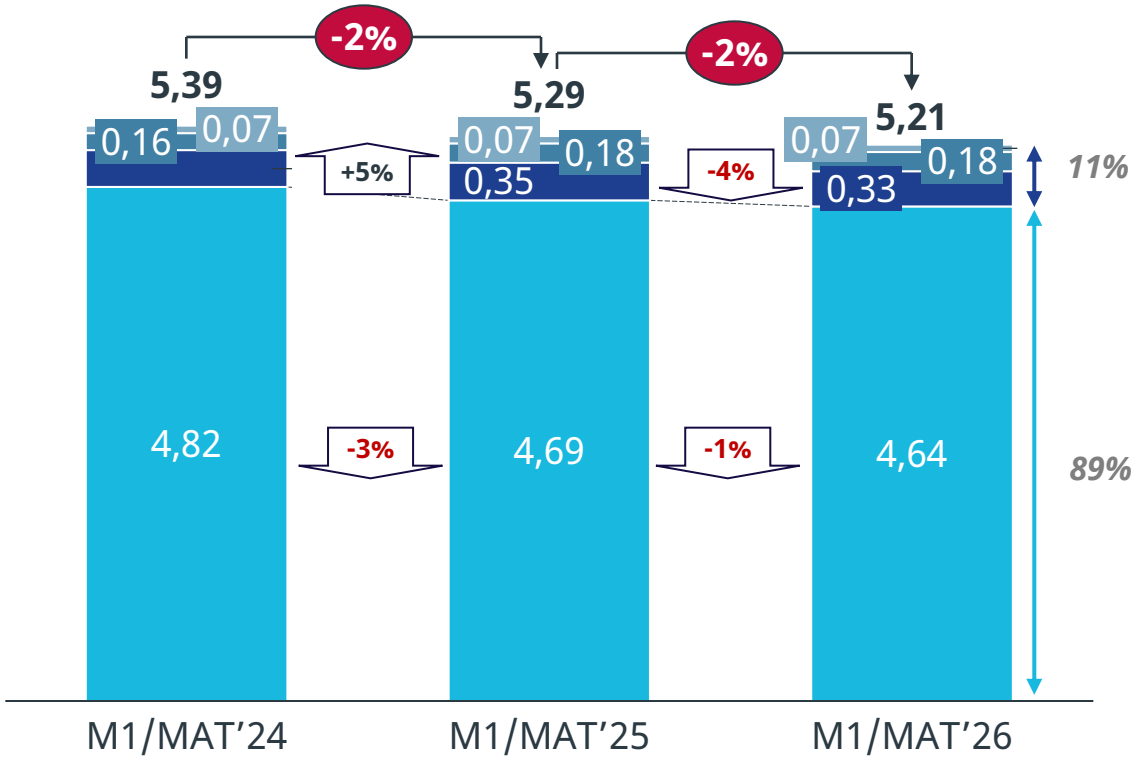
The growth of Russian pharmaceutical market is slowing down in value both in retail and state-funded segments

Total pharma market by channels

Total Sales by Value
Bln RUB



Total Sales by Volume
Bln Packs



Retail Public Federal Reimbursement Regional Reimbursement

Indicator	RUB	USD	EURO	Packs	SU
Value MAT'1'26, Bln	**2 842,3**	**34,9**	**30,5**	**5,2**	**220**
Growth 26/25, %	**11%**	**28%**	**21%**	**-2%**	**0%**

Source: IQDATA database (Retail, Public, DLO, RLO); Trade price

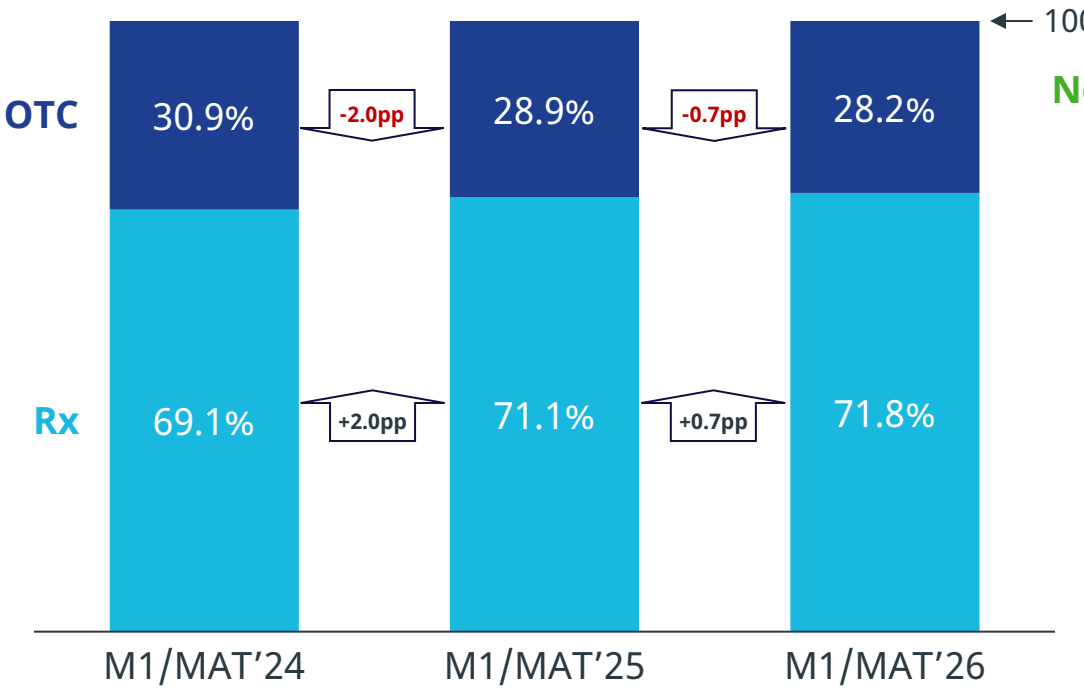
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The market is dominated by Rx drugs; Share of generics is growing slightly compared to previous period

Total pharma market by structure

Prescription status

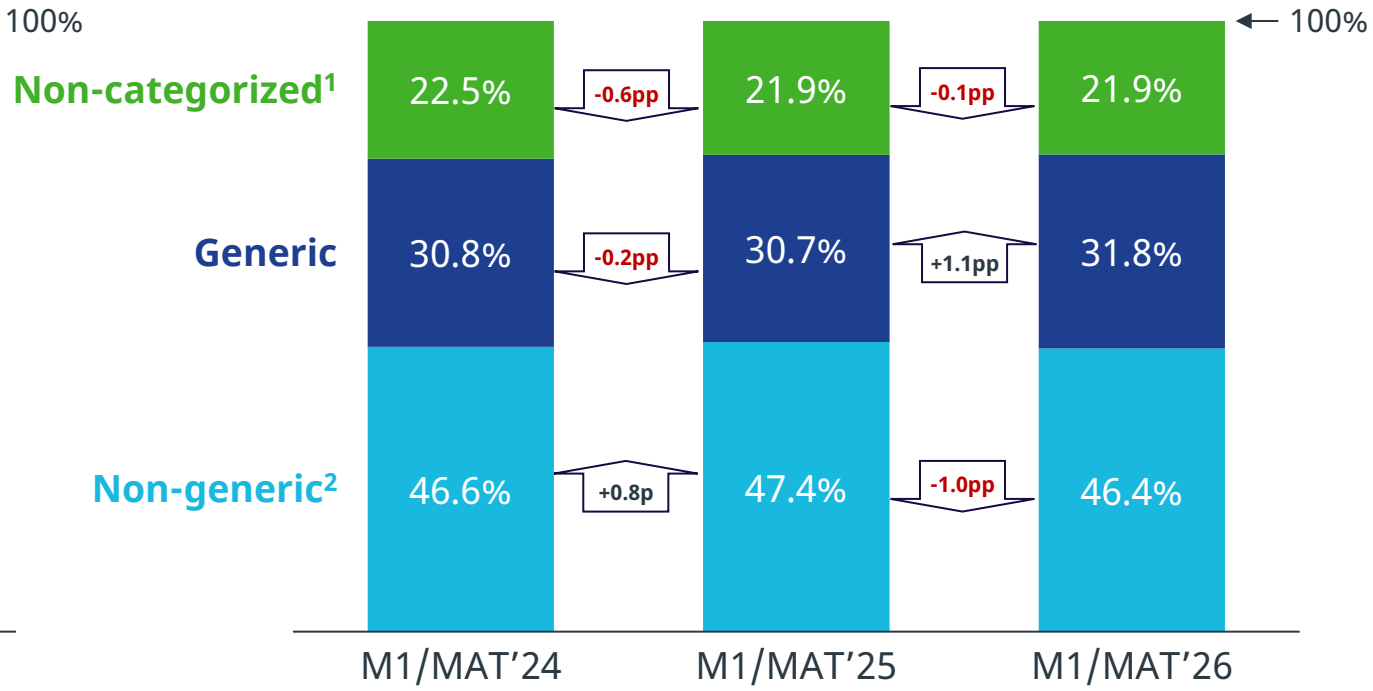
RUB



	Rx / OTC, %		
Retail	51 / 49	53 / 47	54 / 46
State	99 / 1	99 / 1	99 / 1

Non-generic vs generic drugs

RUB



	Non-generic² / Generic / Non-categorized¹, %		
Retail	31 / 40 / 29	31 / 40 / 29	32 / 40 / 28
State	73 / 15 / 12	72 / 17 / 11	69 / 19 / 12

Source: IQDATA database (Retail, Public, DLO, RLO); Trade price

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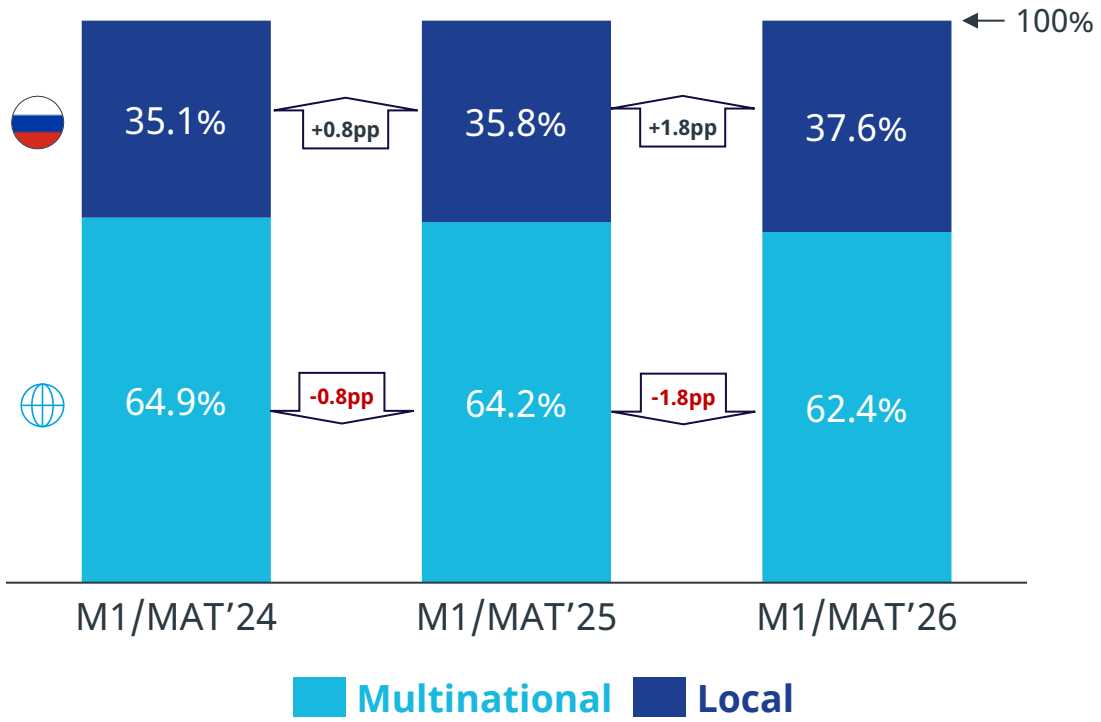
Notes: (1) Vaccines, probiotics, base solutions (e.g. NaCl); (2) Original and first-in-INN products, biosimilars

Share of local companies is increasing in value, while multinational companies are showing volume growth compared to previous period

Total pharma market by corporation nationality

Total Sales value

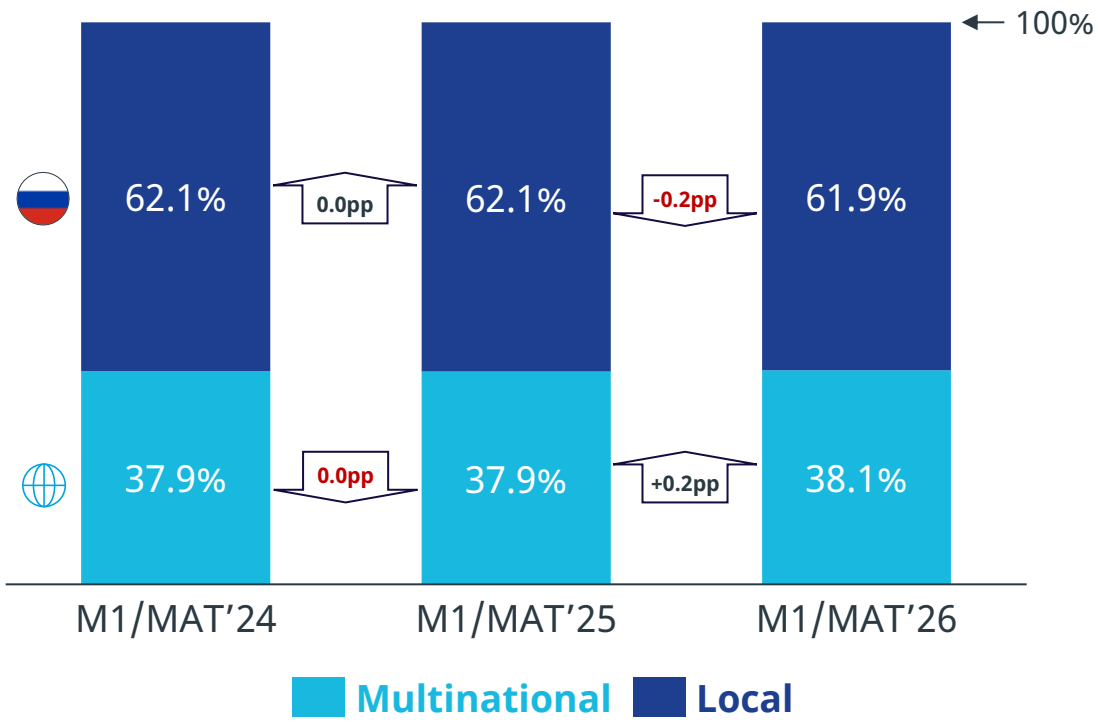
RUB



	Multinational / Local, %		
Retail	63 / 37	62 / 38	61 / 39
State	68 / 32	67 / 33	65 / 35

Total Sales volume

Packs



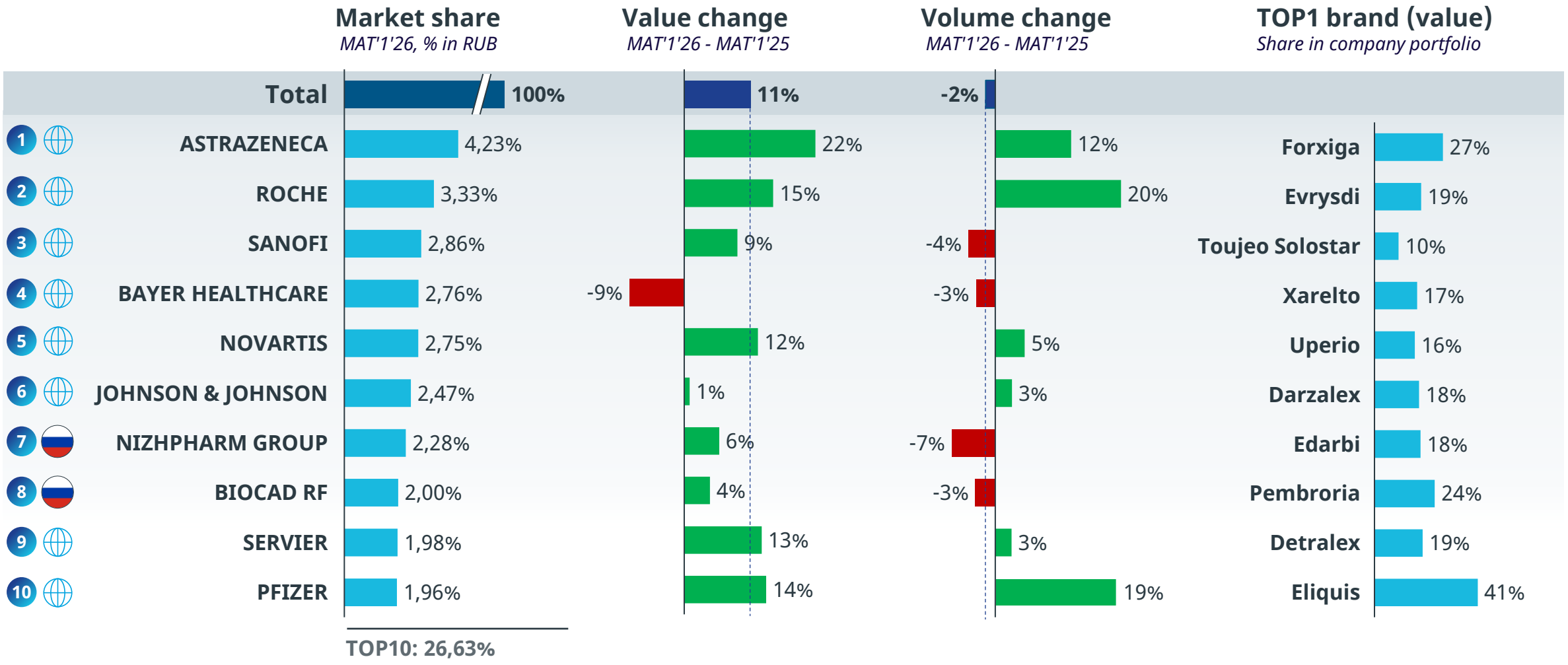
	Multinational / Local, %		
Retail	40 / 60	40 / 60	40/ 60
State	20 / 80	20 / 80	19 / 81

Source: IQDATA database (Retail, Public, DLO, RLO); Trade price

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All TOP10 companies, except for Bayer, have shown value growth compared to the previous period

TOP10 overall ranking of companies by sales

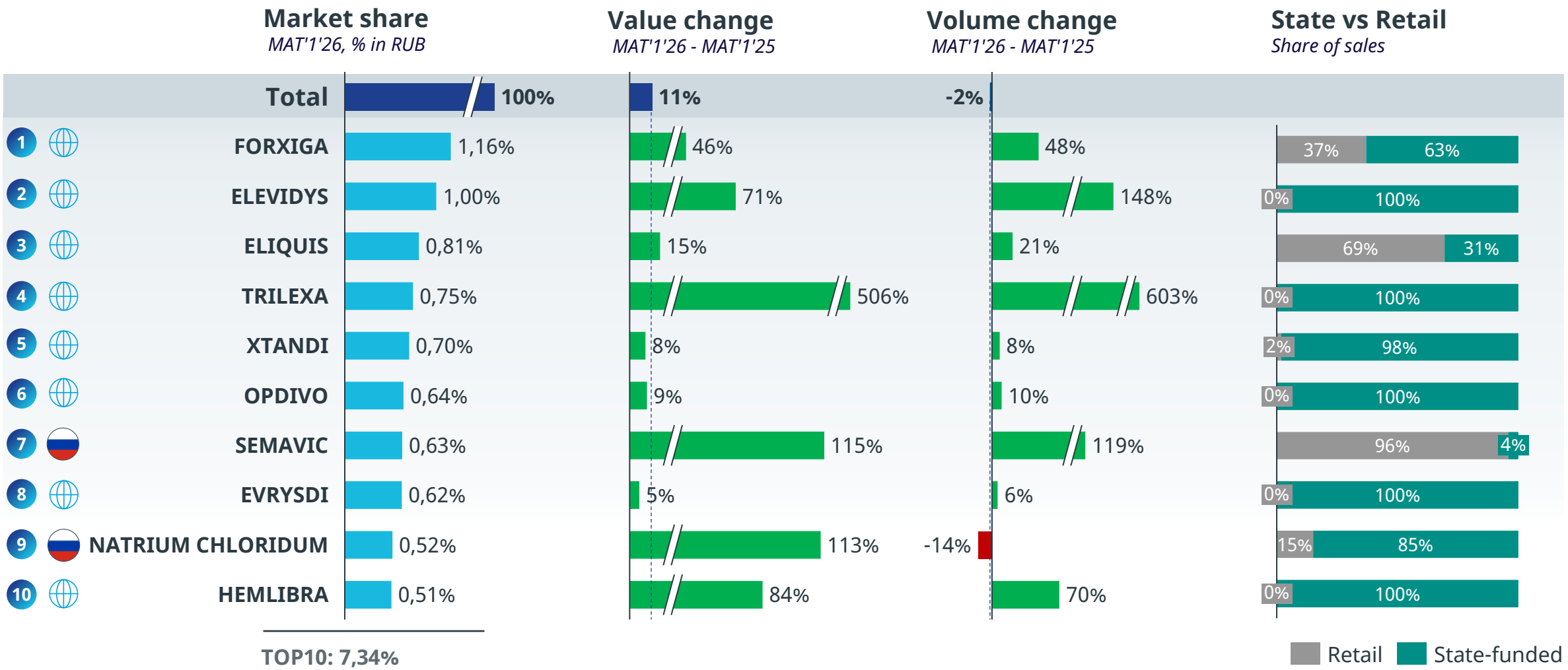


Source: IQDATA database (Retail, Public, DLO, RLO); Trade price

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Most of TOP10 brands generate their sales primarily in the state-funded segment; Two of TOP10 brands are local

TOP10 overall ranking of brands by sales



Source: IQDATA database (Retail, Public, DLO, RLO); Trade price

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Retail segment

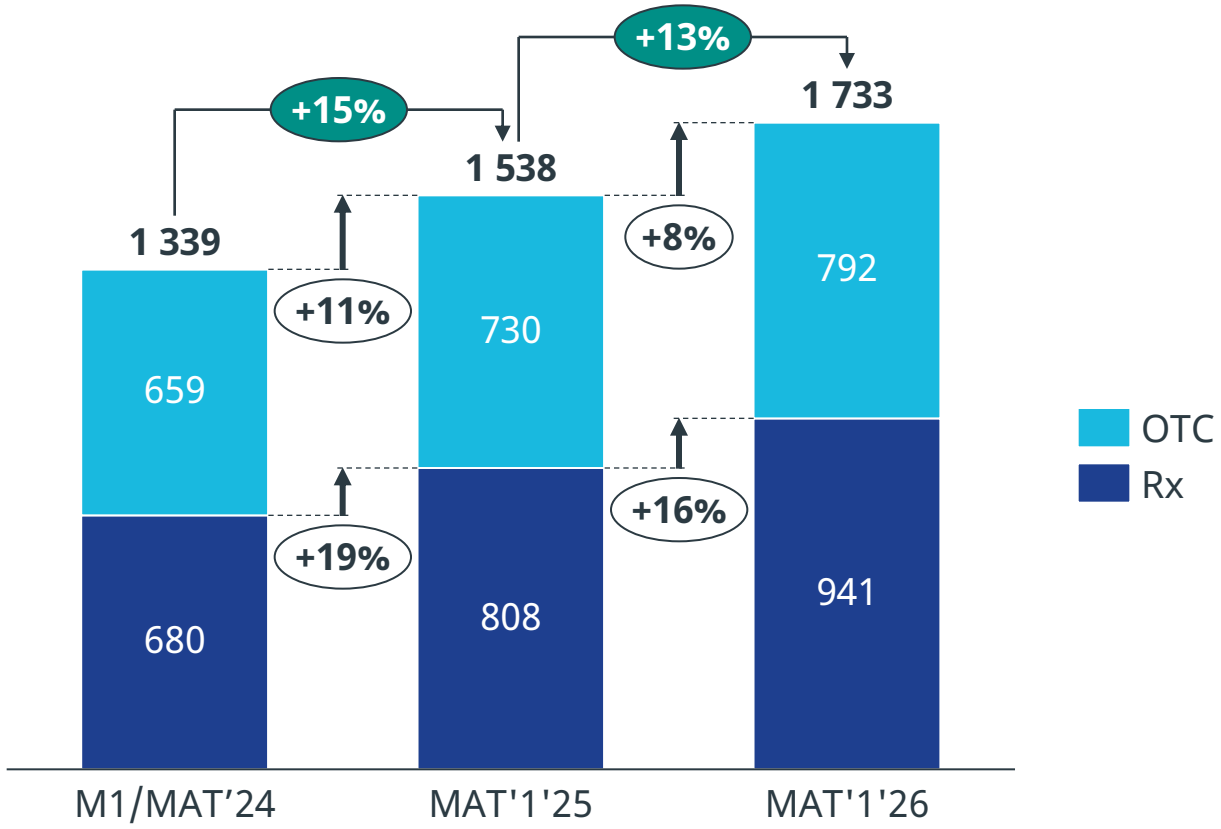


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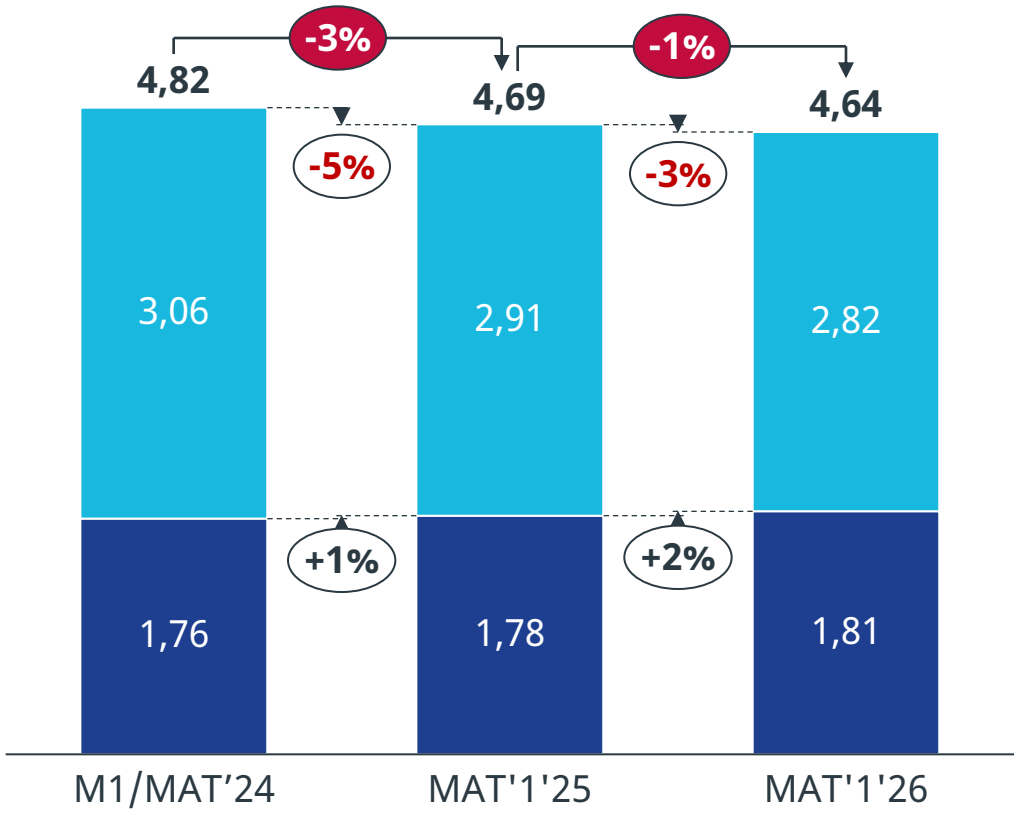
Both Rx and OTC segments of the retail market are slowing down their growth rates in value

Total Retail segment dynamics by OTC/Rx

Total Retail Sales by Value
Bln RUB



Total Retail Sales by Volume
Bln Packs

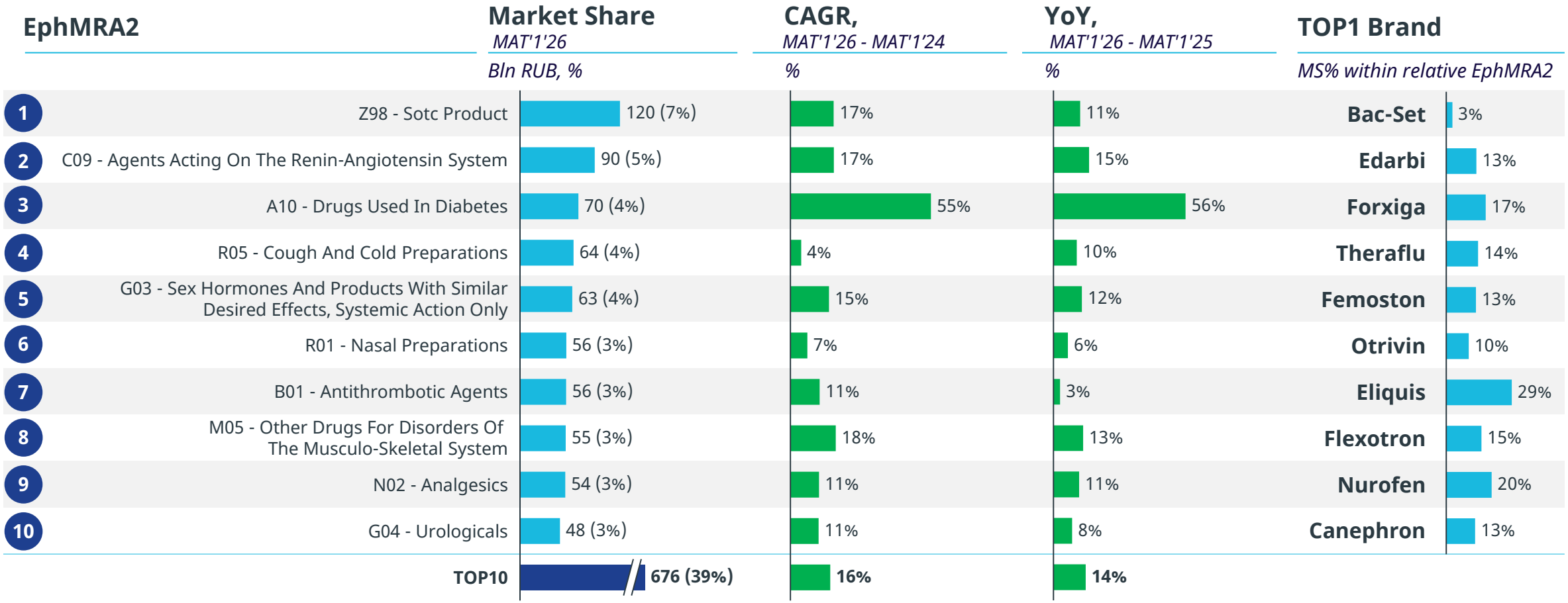


Source: IQDATA database (Retail); Trade price

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All TOP10 categories show positive value dynamics compared to previous period

Retail segment EphMRA2 TOP10 performance



Retail segment

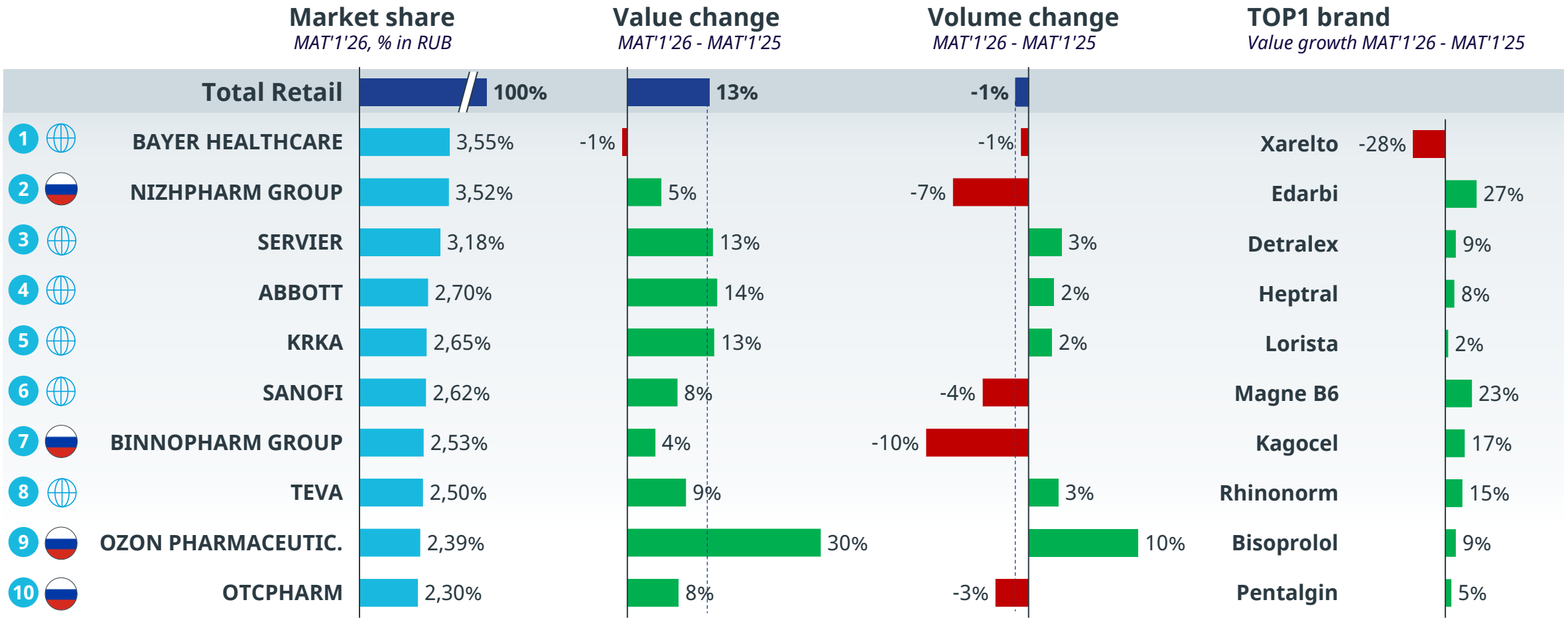
Source: IQDATA database (Retail); Trade price

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Updated monthly

Almost all TOP10 companies, except for Bayer, have shown positive sales dynamics in value terms compared to previous period

TOP10 retail segment ranking of companies by sales



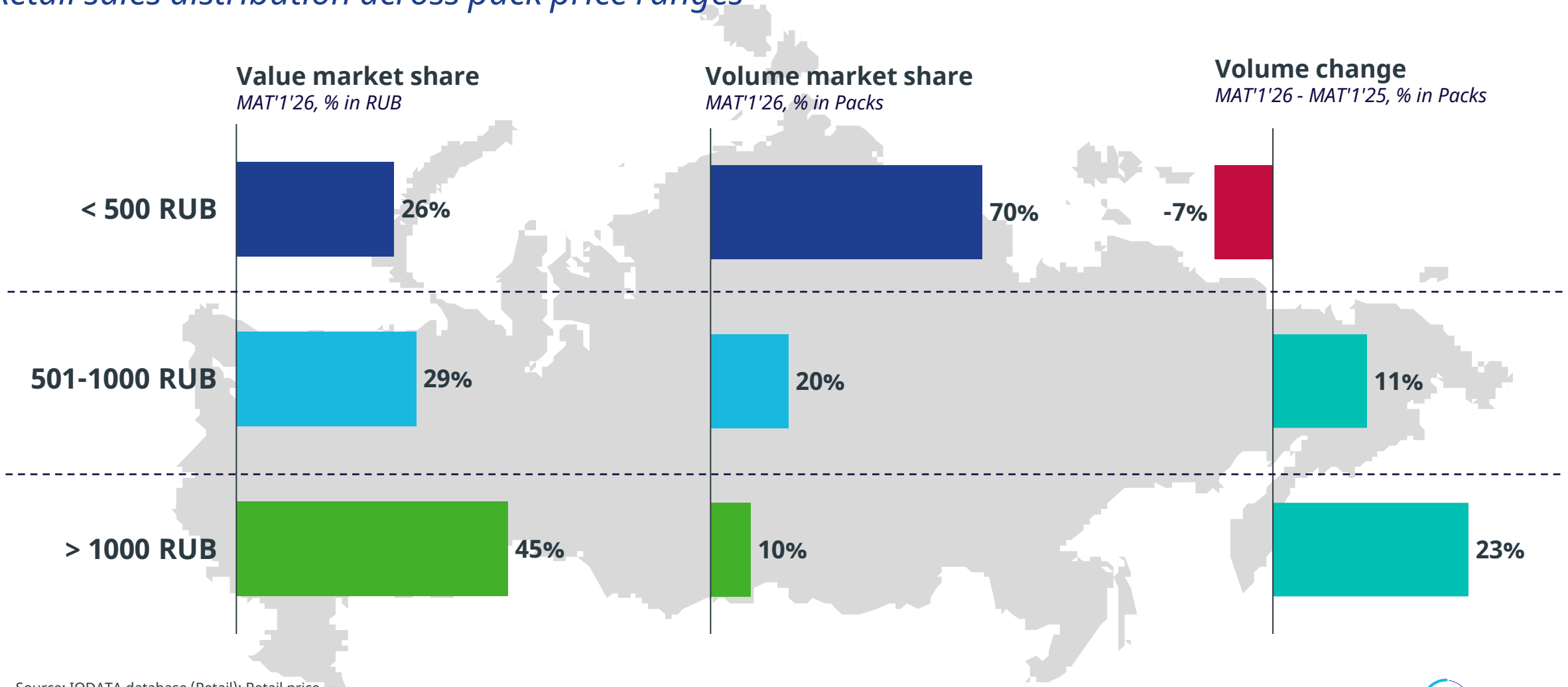
Retail segment

Source: IQDATA database (Retail); Trade price

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Drugs priced under 500 Rubles per pack account for 70% of the volume sales in retail segment; More expensive segments have positive volume dynamics vs previous period

Retail sales distribution across pack price ranges



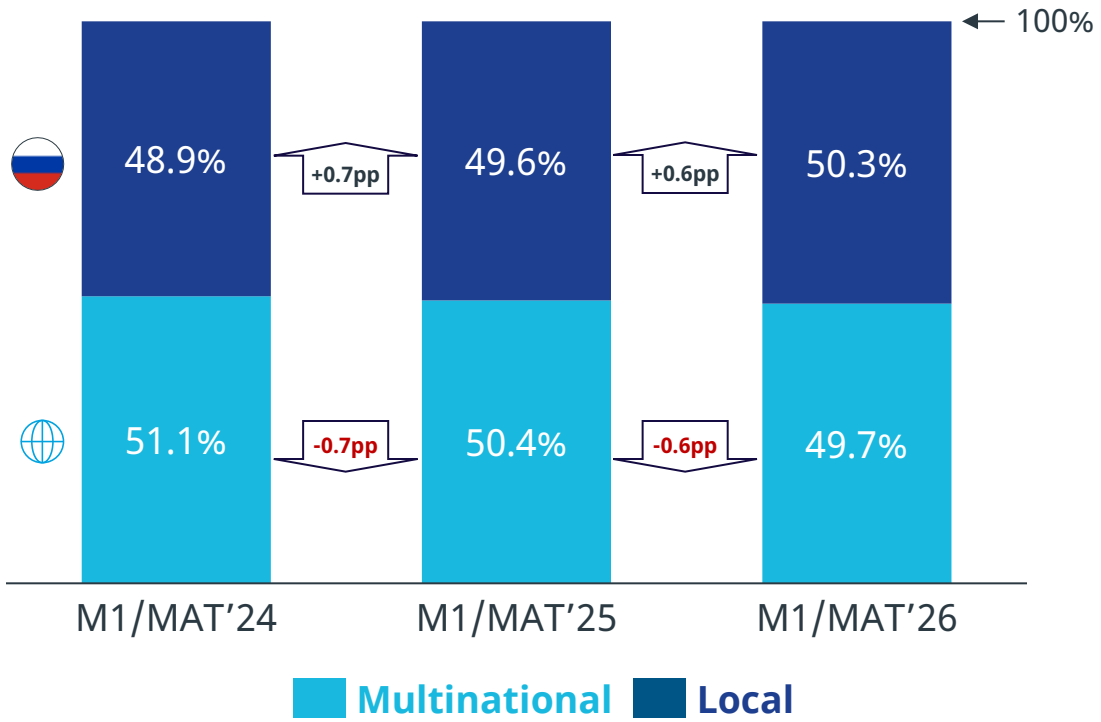
Source: IQDATA database (Retail); Retail price

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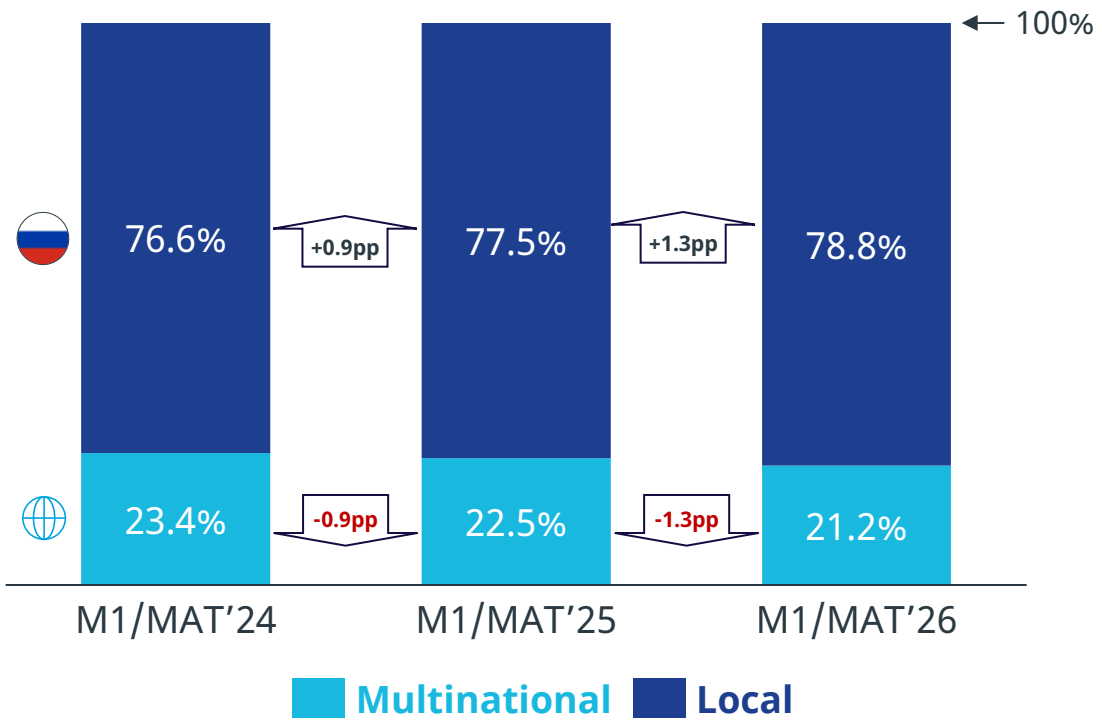
Share of local companies in food/dietary supplements segment has increased both in value and volume vs previous period

Food/Dietary supplements segment by corporation nationality

Total Sales value
RUB



Total Sales volume
Packs



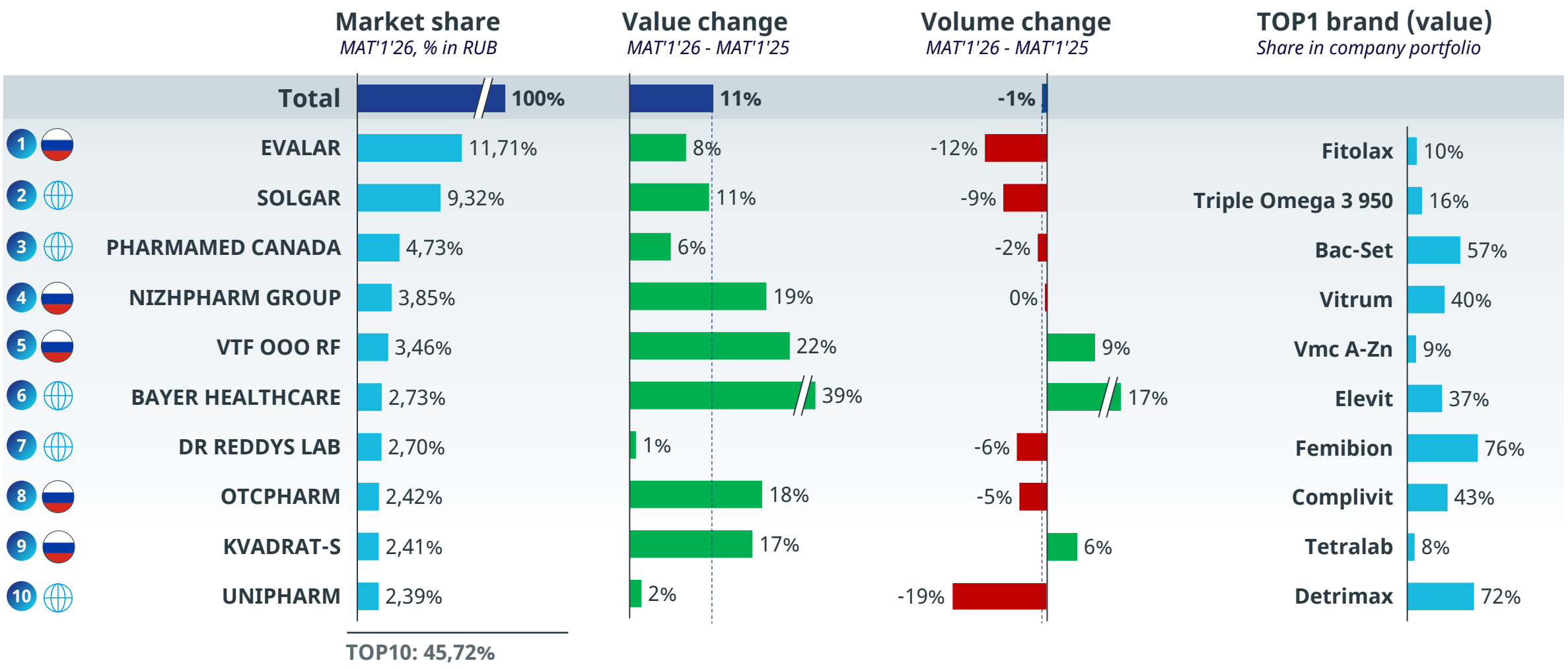
Source: IQDATA database (Retail, Public, DLO, RLO); Trade price

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All TOP10 companies in FS/DS segment are demonstrating positive value growth vs previous period

FS/DS segment

TOP10 overall ranking of companies by sales in food/dietary supplements segment



Source: IQDATA database (Retail, Public, DLO, RLO); Trade price

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In FS/DS segment all OTC2 categories in TOP10 show value growth compared to previous period

FS/DS segment

Food/Dietary supplements segment OTC2 TOP10 performance

	OTC2	Market Share MAT'1'26 Bln RUB, %	Value change MAT'1'26 - MAT'1'25 %	Volume change MAT'1'26 - MAT'1'25 %	TOP1 Brand MS% within relative EphMRA2
1	04F - Mineral Supplements	13 (11%)	18%	-4%	Magnesium Citrate 9%
2	04A - Multivitamins With Minerals	11 (9%)	9%	1%	Femibion 22%
3	03F - Probiotics For Digestive Health	9 (8%)	4%	3%	Maxilac 22%
4	04G - Omega-3 Fatty Acids	7 (6%)	16%	-3%	Triple Omega 3 950 33%
5	02G - Joint Care Products	7 (5%)	28%	17%	Artra 21%
6	12D - Gynaecological Preparations	6 (5%)	19%	1%	Mense 7%
7	04H - Other Dietary Supplements	6 (5%)	7%	-4%	Glycin Forte Evala 6%
8	04E - Other Specific Vitamins	5 (4%)	10%	-5%	Detrimax 43%
9	03D - Antidiarrhoeals	4 (3%)	5%	-10%	Bac-Set 74%
10	04D - Vitamin C Products	4 (3%)	11%	1%	Vitamin C 41%
	TOP10	**71 (59%)**	**13%**	**-2%**	

Total pharmaceutical market overview

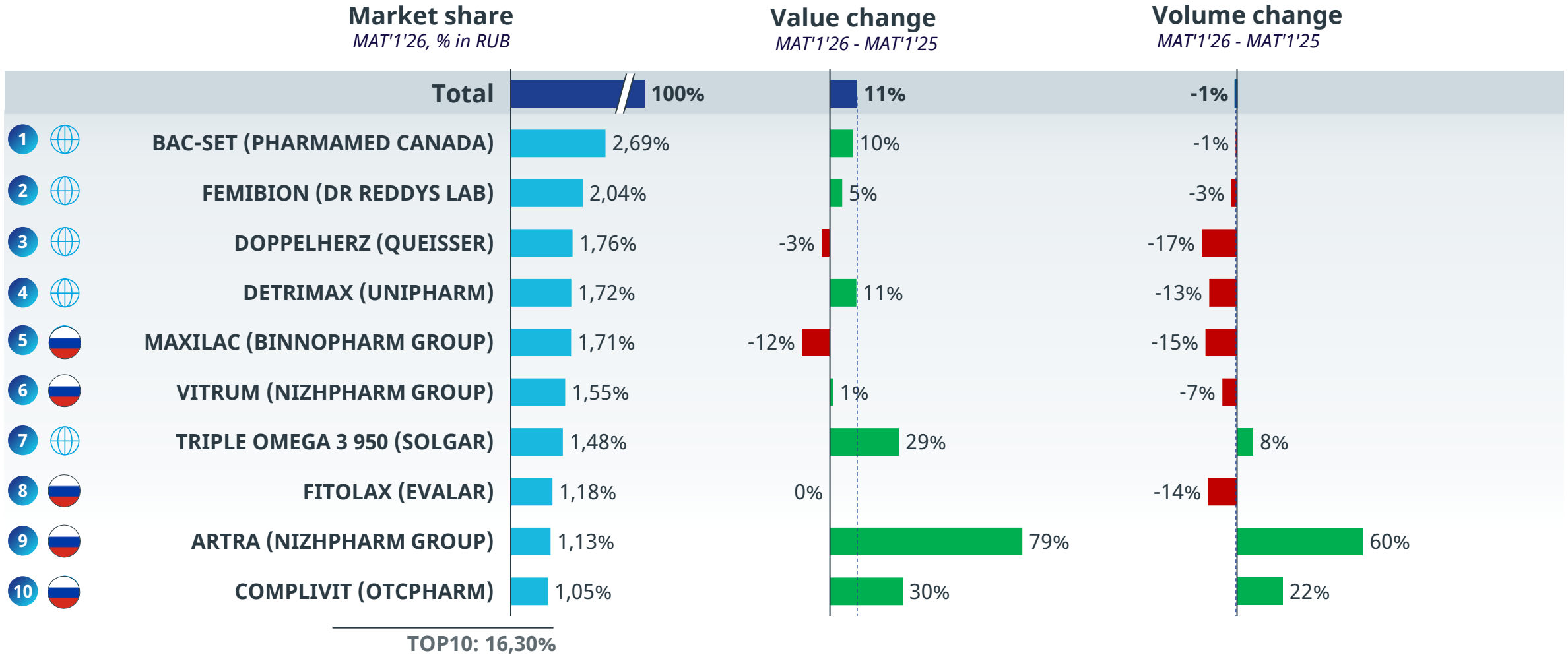
Source: IQDATA database (Retail); Trade price

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ARTRA (NIZHPHARM GROUP) is the fastest-growing brand among the TOP10 showing the highest value and volume growth vs previous period

FS/DS segment

TOP10 overall ranking of brands by sales in food/dietary supplements segment



Source: IQDATA database (Retail, Public, DLO, RLO); Trade price

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TOP10 brands by sales across pack price ranges in the food/dietary supplements segment

FS/DS segment

<500 RUR

TOP10 brands
Sales, MS MAT'1'26

Bln. Trd. RUR

1	Ferrohaematogen (Pharmstandart)	0,7 (2,9%)
2	Lactacyd (Sopharma)	0,4 (1,7%)
3	Glycin Forte Evala (Evalar)	0,3 (1,5%)
4	Fitolax (Evalar)	0,3 (1,3%)
5	Vmc A-Zn (Vtf Ooo Rf)	0,3 (1,3%)
6	Naturetto (Natur Product)	0,3 (1,2%)
7	Lollipop+C (Guslitsa Ooo)	0,3 (1,2%)
8	Naturino (Natur Product)	0,3 (1,1%)
9	Complivit (Otcpharm)	0,3 (1,1%)
10	Neotravisil (Sun Pharma)	0,2 (1,1%)
	TOP10	**3,3 (14,4%)**

500-1500 RUR

TOP10 brands
Sales, MS MAT'1'26

Bln. Trd. RUR

	Bac-Set (Pharmamed Canada)	3,2 (6,1%)
	Maxilac (Binnopharm Group)	2,1 (3,8%)
	Detrimax (Unipharm)	2,0 (3,8%)
	Doppelherz (Queisser)	1,5 (2,7%)
	Vitrum (Nizhpharm Group)	1,3 (2,4%)
	Fitolax (Evalar)	1,1 (2,1%)
	Complivit (Otcpharm)	1,0 (1,9%)
	Omega-3 (Polyaris)	0,8 (1,5%)
	Vitamin C (Evalar)	0,8 (1,4%)
	Supradyn (Bayer Healthcare)	0,7 (1,3%)
	TOP10	**14,4 (27,0%)**

>1500 RUR

TOP10 brands
Sales, MS MAT'1'26

Bln. Trd. RUR

	Triple Omega 3 950 (Solgar)	1,8 (4,0%)
	Femibion (Dr Reddys Lab)	1,8 (4,0%)
	Artra (Nizhpharm Group)	1,4 (3,1%)
	Magnesium Citrate (Solgar)	1,2 (2,6%)
	Theraflex (Bayer Healthcare)	0,9 (2,1%)
	Elevit (Bayer Healthcare)	0,9 (2,1%)
	Sideral (Pharmanutra S.P.A.)	0,9 (2,1%)
	Artneo (Petrovax)	0,7 (1,5%)
	Doppelherz (Queisser)	0,6 (1,5%)
	Dikirogen (Pizeta Pharma)	0,6 (1,4%)
	TOP10	**10,8 (24,4%)**

Source: IQDATA database (Retail, Public, DLO, RLO); Trade price

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TOP10 categories in E-commerce (OTC/Rx)

OTC segment

	TOP10 EphMRA2 *Sales, MS% MAT'1'26* *Bln. RUR, %*		Sales split E-com/offline *%, MAT'1'26*	
1	Z98A - Sotc Product	37,4 (27,3%)	24%	76%
2	R02A - Throat Preparations	5,2 (3,8%)	11%	89%
3	R01A - Topical Nasal Preparations	4,7 (3,4%)	9%	91%
4	C05C - Varicose Therapy, Systemic	4,6 (3,3%)	18%	82%
5	N02B - Non-Narcotics And Anti-Pyretics	3,8 (2,8%)	8%	92%
6	A05B - Liver Disorder Products, Hepatic Protectors And Lipotropics	3,3 (2,4%)	16%	84%
7	R05C - Expectorants	2,9 (2,1%)	10%	90%
8	A07F - Antidiarrhoeal Micro-Organisms	2,7 (1,9%)	16%	84%
9	L03A - Immunostimulating Agents Excluding Interferons	2,6 (1,9%)	13%	87%
10	A09A - Digestives Including Enzymes	2,5 (1,9%)	12%	88%

TOP10 MS%: 51%

Avg. E-com segment MS%: 14%

E-com Offline

Rx segment

	TOP10 EphMRA2 *Sales, MS% MAT'1'26* *Bln. RUR, %*		Sales split E-com/offline *%, MAT'1'26*	
1	M05X - All Other Musculoskeletal Products	15,7 (6,6%)	35%	65%
2	A10S - Glp-1 Agonist Antidiabetics	14,8 (6,2%)	52%	48%
3	G03A - Hormonal Contraceptives, Systemic	12,1 (5,1%)	33%	67%
4	A08A - Antiobesity Preparations, Excluding Dietetics	9,0 (3,8%)	50%	50%
5	N06A - Anti-Depressants And Mood Stabilisers	7,0 (2,9%)	33%	67%
6	B01F - Direct Factor Xa Inhibitors	6,9 (2,9%)	21%	79%
7	C10A - Lipid-Regulating Products	6,3 (2,6%)	20%	80%
8	C09D - Angiotensin-Ii Antagonists, Combinations	6,1 (2,6%)	19%	81%
9	M01A - Anti-Rheumatics, Non-Steroidal	5,2 (2,2%)	10%	90%
10	C09B - Ace Inhibitors, Combinations	5,0 (2,1%)	17%	83%

TOP10 MS%: 37%

Avg. E-com segment MS%: 29%

E-com Offline

Retail segment

Source: IQDATA bases: Pharmatrend Russia, Pharmatrend Russia: E-commerce; without EphMRA2: T02,T03; Retail prices

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TOP10 companies in E-commerce (OTC/Rx)

OTC segment

	TOP10 companies *Sales, MS% MAT'1'26* *Bln. RUR, %*	Sales split E-com/offline *%, MAT'1'26*
1	Nizhpharm Group 6,0 (4,4%)	13% 87%
2	Evalar 5,5 (4,0%)	24% 76%
3	Solgar 5,3 (3,9%)	42% 58%
4	Bayer Healthcare 5,2 (3,8%)	17% 83%
5	Sanofi 4,5 (3,3%)	13% 87%
6	Otcpharm 4,5 (3,3%)	10% 90%
7	Haleon 3,6 (2,6%)	11% 89%
8	Servier 3,4 (2,5%)	18% 82%
9	Binnopharm Group 3,2 (2,4%)	10% 90%
10	Johnson & Johnson 3,2 (2,4%)	12% 88%

TOP10 MS%: 33%

E-com Offline

Avg. E-com segment MS%: **17%**

Rx segment

	TOP10 companies *Sales, MS% MAT'1'26* *Bln. RUR, %*	Sales split E-com/offline *%, MAT'1'26*
1	Bayer Healthcare 12,5 (5,3%)	31% 69%
2	Geropharm 12,3 (5,2%)	46% 54%
3	Promomed 12,1 (5,1%)	47% 53%
4	Servier 8,1 (3,4%)	19% 81%
5	Astrazeneca 8,0 (3,4%)	23% 77%
6	Abbott 7,9 (3,3%)	25% 75%
7	Krka 7,5 (3,2%)	18% 82%
8	Gedeon Richter 6,8 (2,9%)	22% 78%
9	Novartis 4,8 (2,0%)	24% 76%
10	Ozon Pharmaceutic. 4,5 (1,9%)	13% 87%

TOP10 MS%: 36%

E-com Offline

Avg. E-com segment MS%: **27%**

Retail segment

Source: IQDATA bases: Pharmatrend Russia, Pharmatrend Russia: E-commerce; without EphMRA2: T02,T03; Retail prices

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State-funded segment

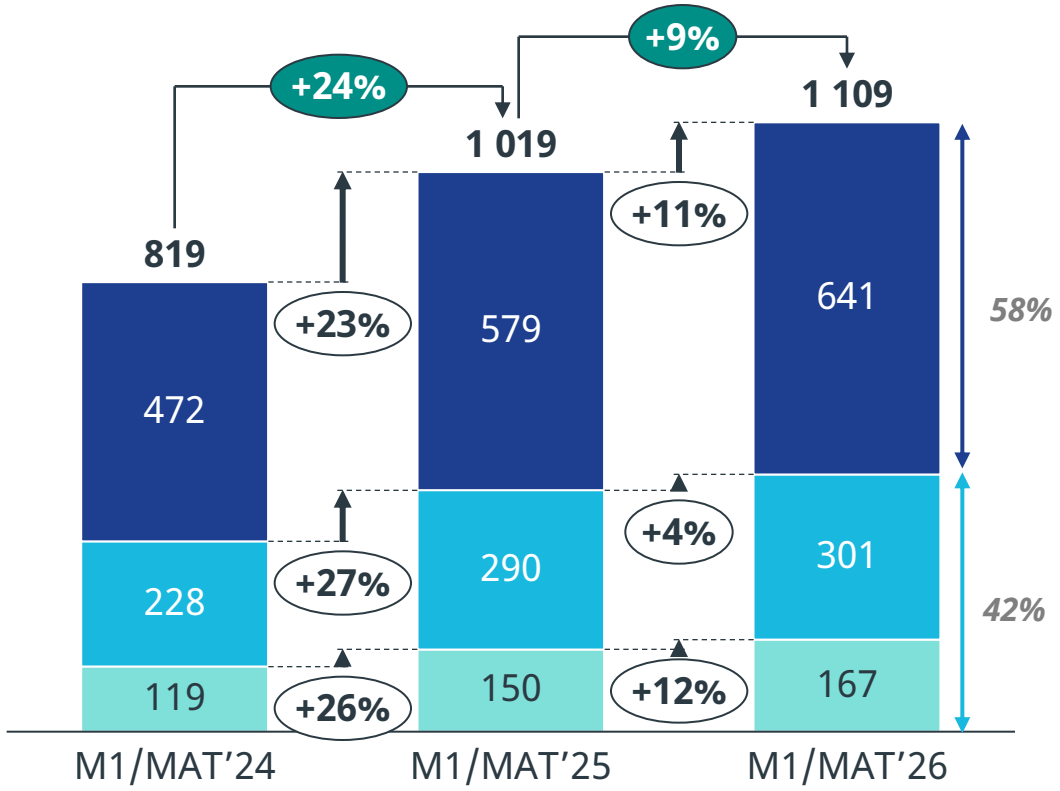


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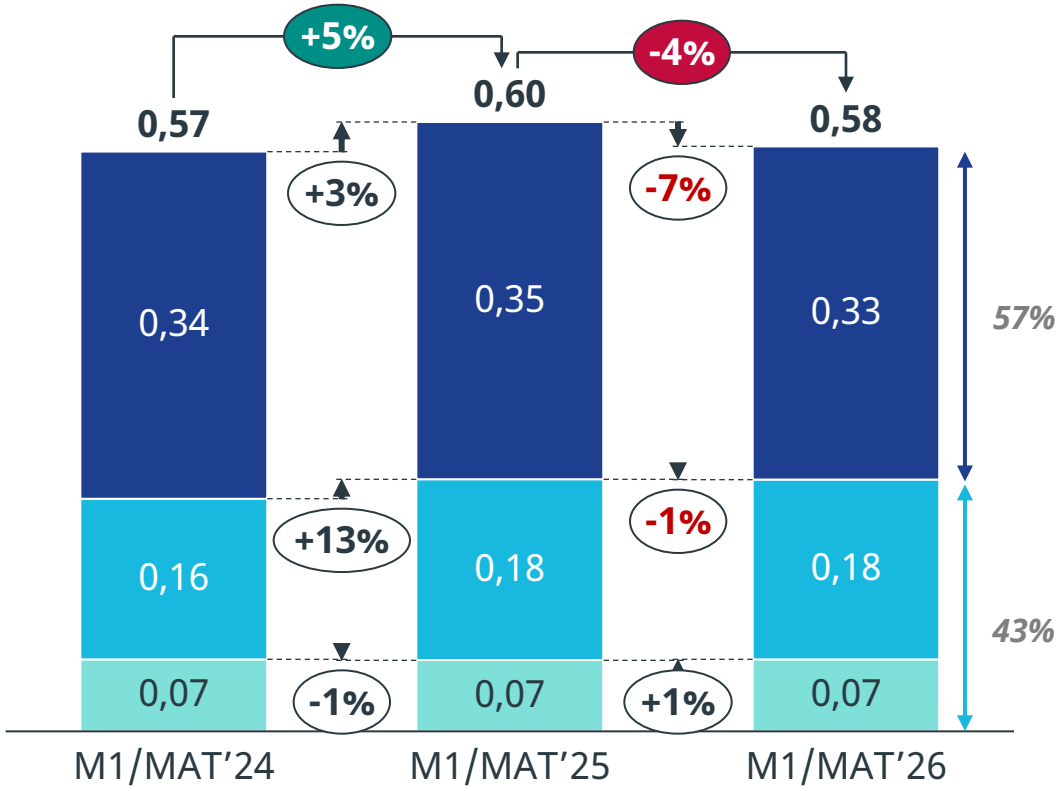
All the state funded segments are showing a slowdown in growth rates in value terms compared to previous period

Total State funded segment

Total State funded Sales by Value
Bln RUB



Total State funded Sales by Volume
Bln Packs



Public | Regional Reimbursement | Federal Reimbursement

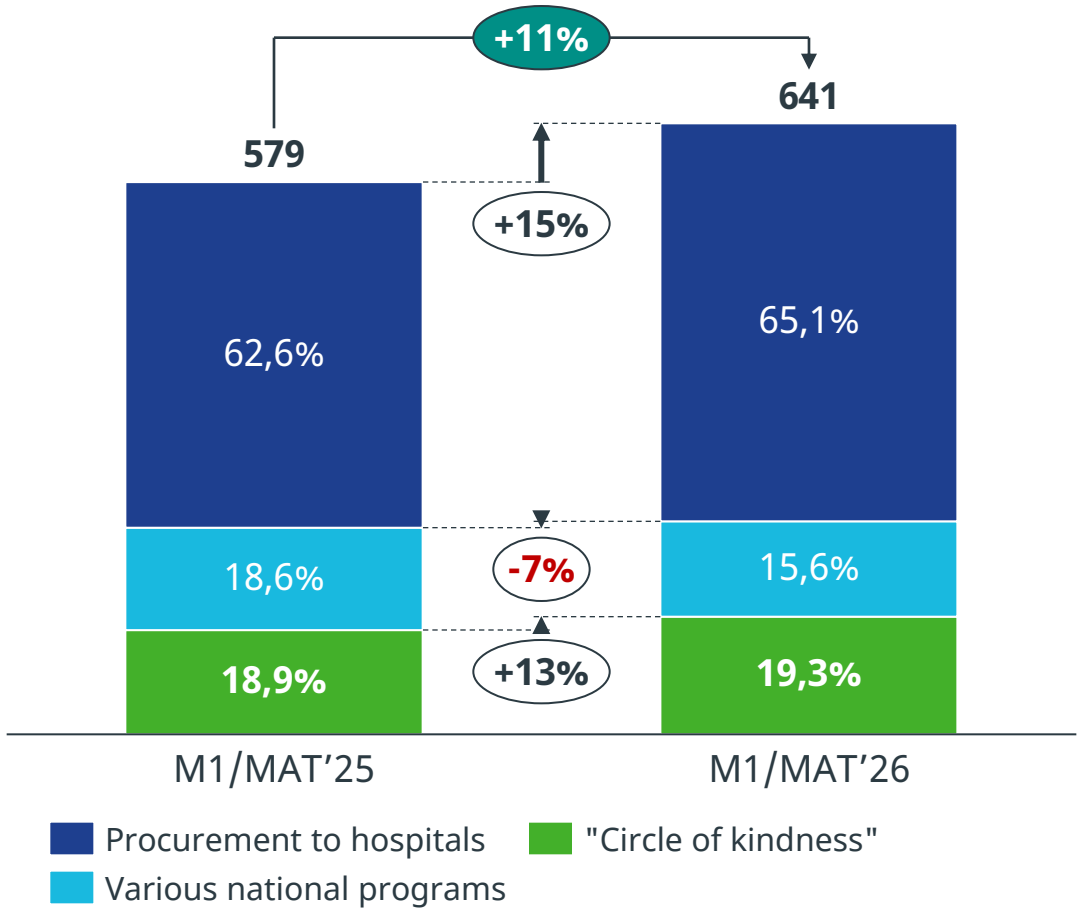
Source: IQDATA database (Public, DLO, RLO); Trade price

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In public segment there is a decrease in funding in various national programs

Public (hospital) segment

Public Sales by Market Type
Bln RUB



TOP10 Brands in «Circle of kindness»

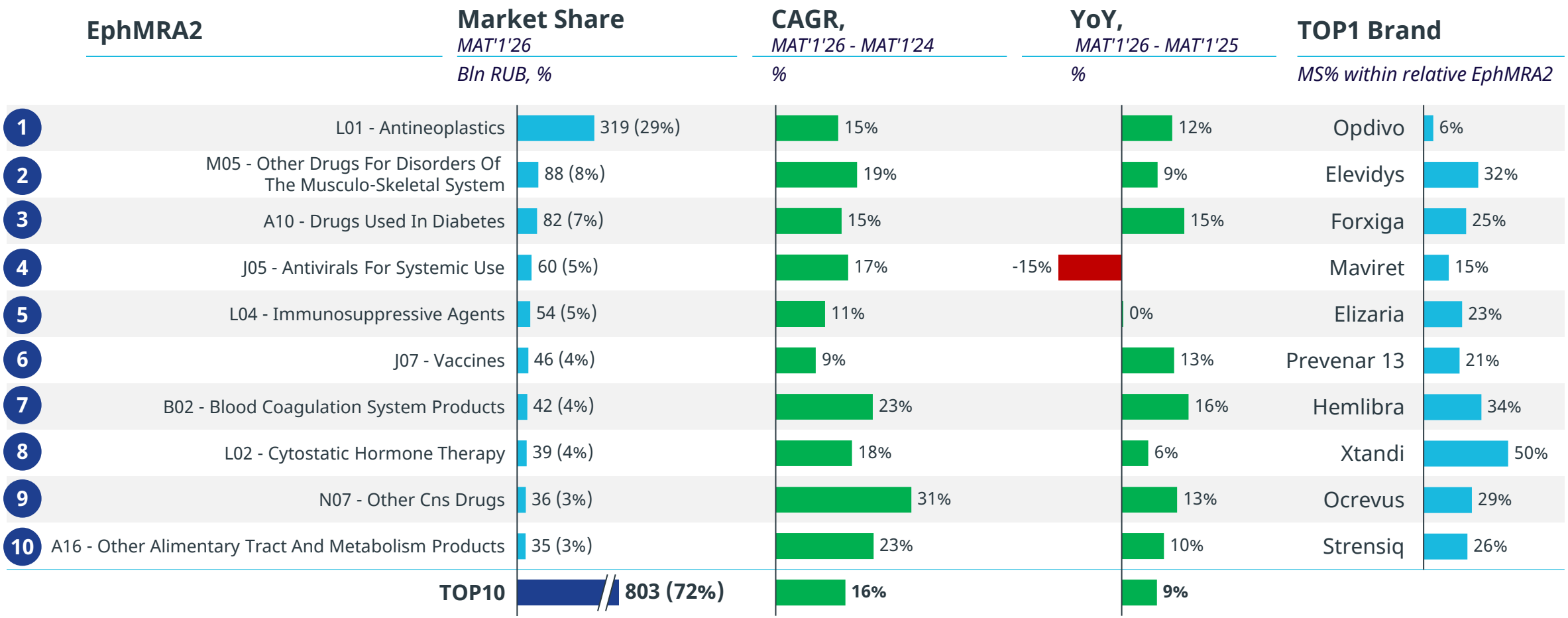
	Sales *MAT'1'26, % in Bln. RUB*	Growth *MAT'1'26 vs MAT'1'25, % in RUB*
Elevidys (Sarepta Therapeut.)	28,18	69,4%
Trilexa (Laboratorio Tuteur)	18,33	436,6%
Evrysdi (Roche)	10,51	-1,2%
Zolgensma (Novartis)	10,38	29,1%
Strensiq (Astrazeneca)	8,12	220,8%
Koselugo (Astrazeneca)	7,49	-9,4%
Translarna (Ptc Therapeutics)	6,79	-48,7%
Crysvita (Kyowa Kirin)	5,13	-5,8%
Vyjuvek (Krystal Biotech)	3,85	84,7%
Vimizaim (Biomarin Ireland)	3,78	2,5%

State funded segment

Source: IQDATA database (Public); Trade price
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L01 is the largest category taking 29% of market share; Category N07 shows the strongest CAGR growth

State funded segment EphMRA2 TOP10 performance



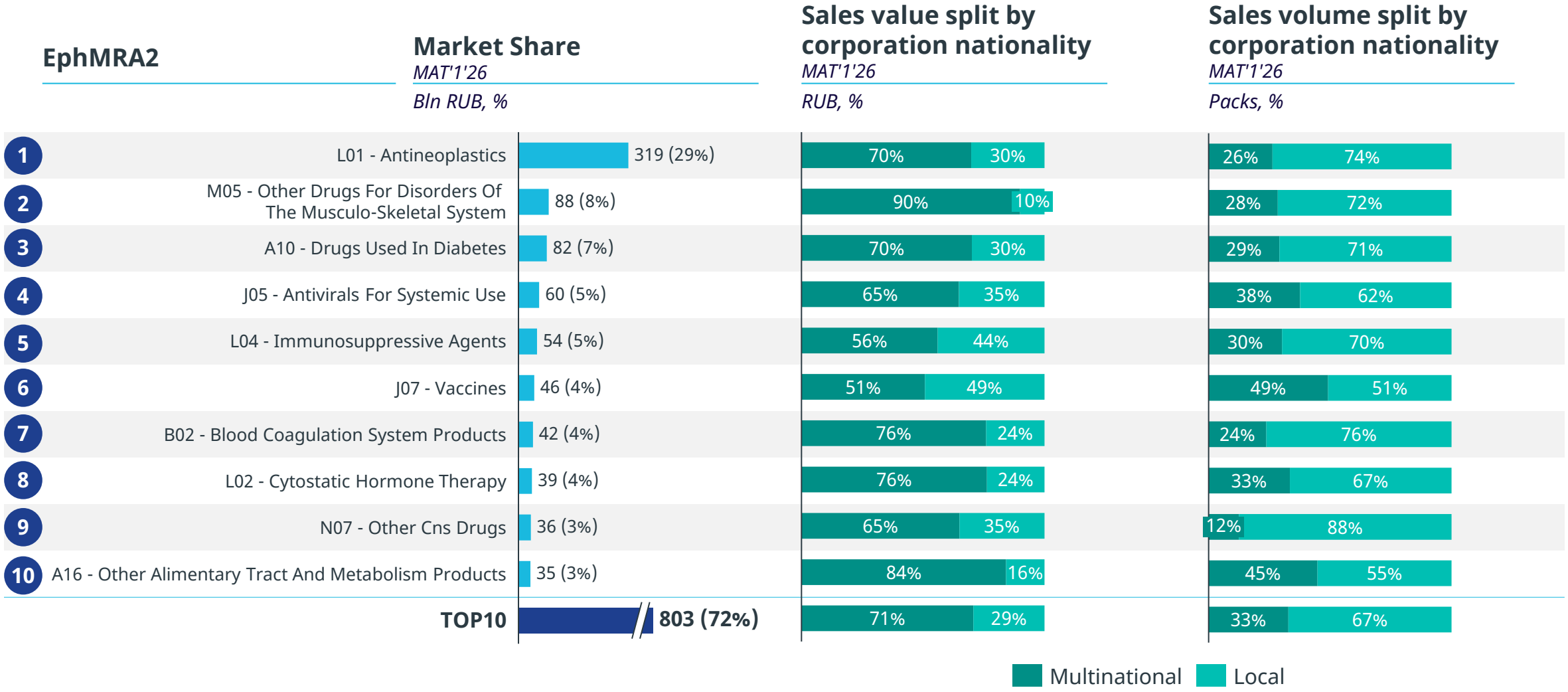
State funded segment

Source: IQDATA database (Public, DLO, RLO); Trade price

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Multinational corporations' products in the TOP10 EphMRA2 account for 71% of the market value and 33% of the market volume sales

State funded segment EphMRA2 TOP10 performance



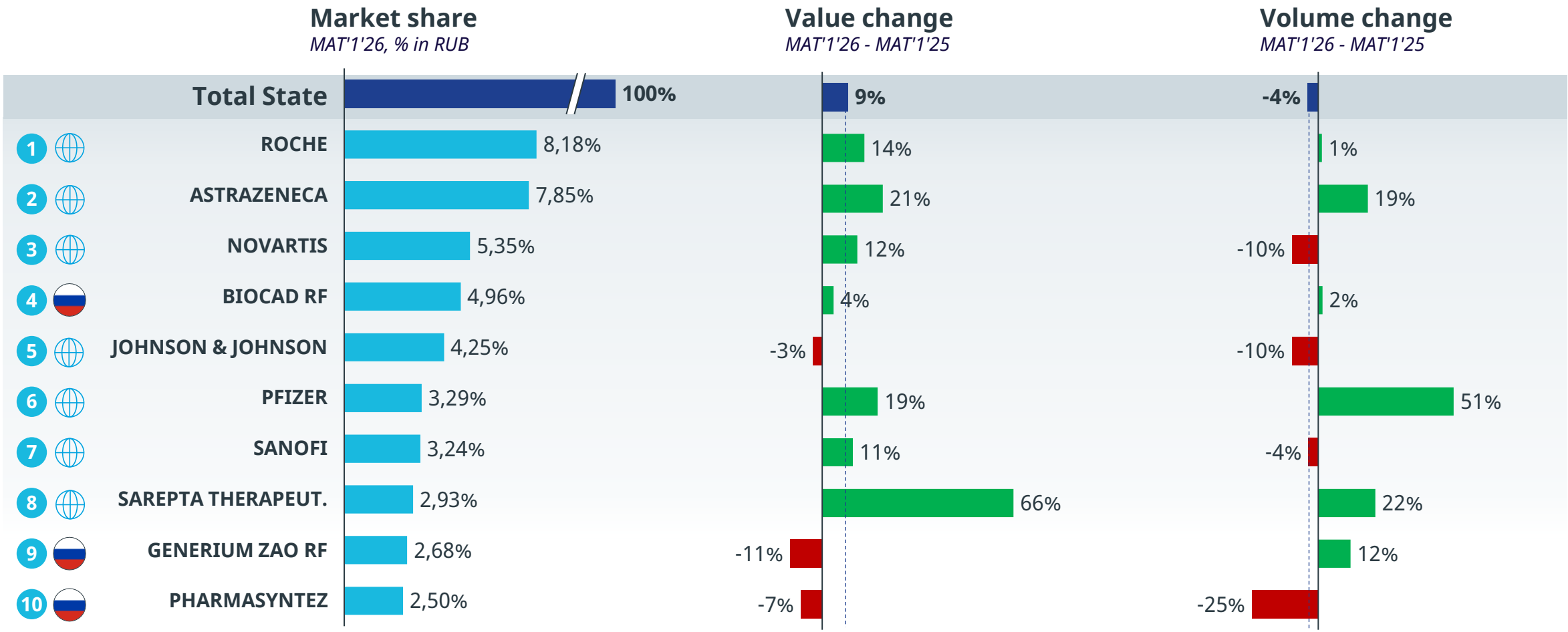
State funded segment

Source: IQDATA database (Public, DLO, RLO); Trade price

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Sarepta Therapeutics shows the largest value growth compared to previous period

TOP10 state funded segment ranking of companies by sales



State funded segment

Source: IQDATA database (Public, DLO, RLO); Trade price

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