



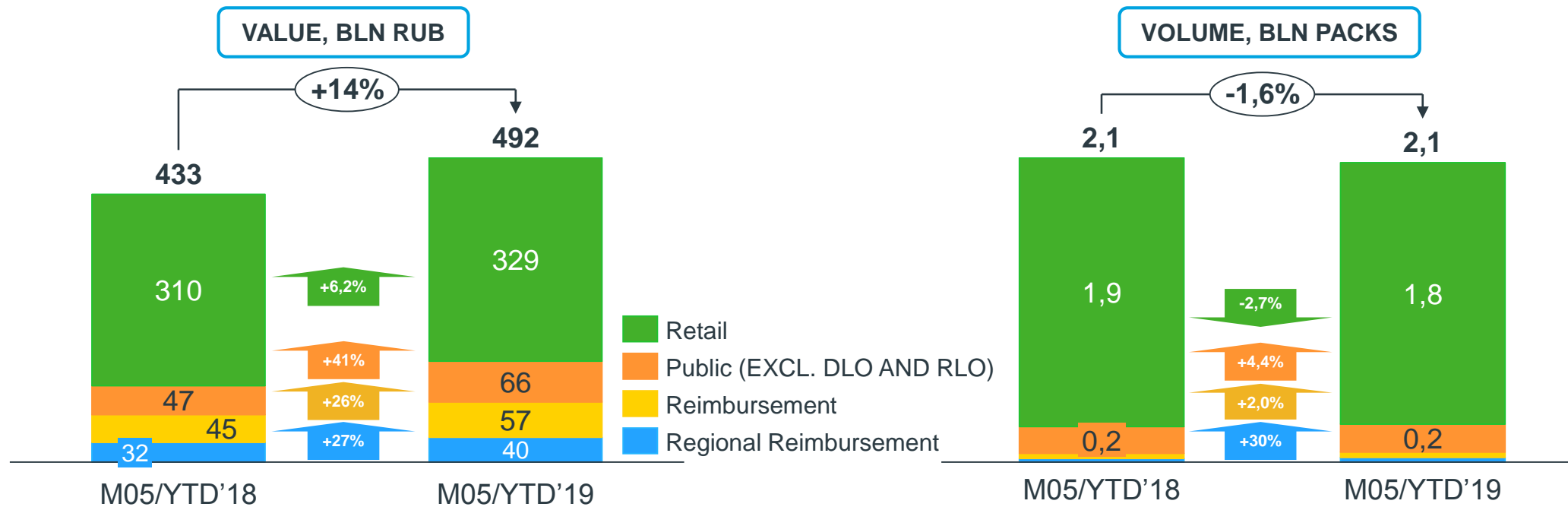
# Facts from IQVIA

M05 2019



# Russian pharma market growth in January-May 2019

Market grew by 14% in value and decreased by 1,6% in volume

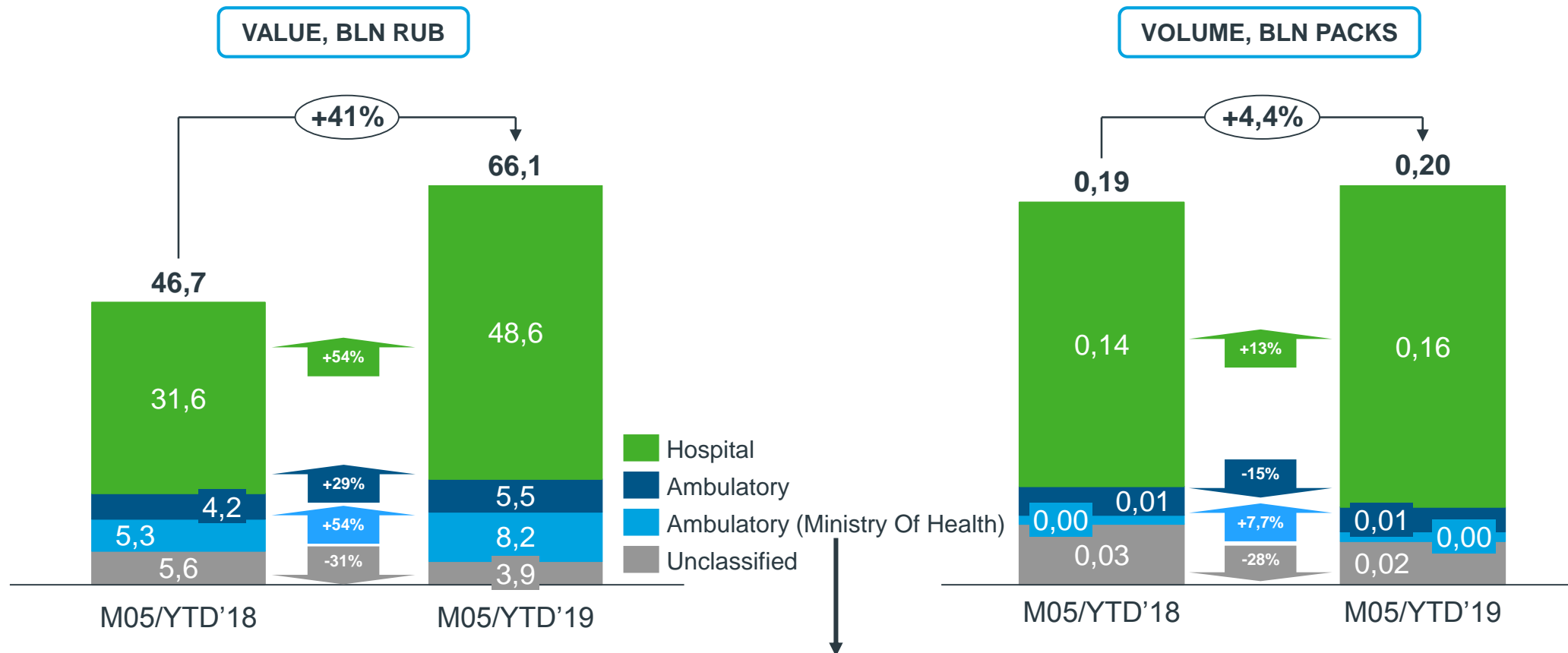


Indicator	RUB	USD	EUR	PACKS
Value M05/YTD'19, Bln.	492	7,5	6,7	2,1
Growth M05/YTD'19%	▲ 14%	▲ 2,0%	▲ 10%	▼ -1,6%



# Public channel by more detailed segments (new)

Growth is driven by hospital and ambulatory (MoH) purchases



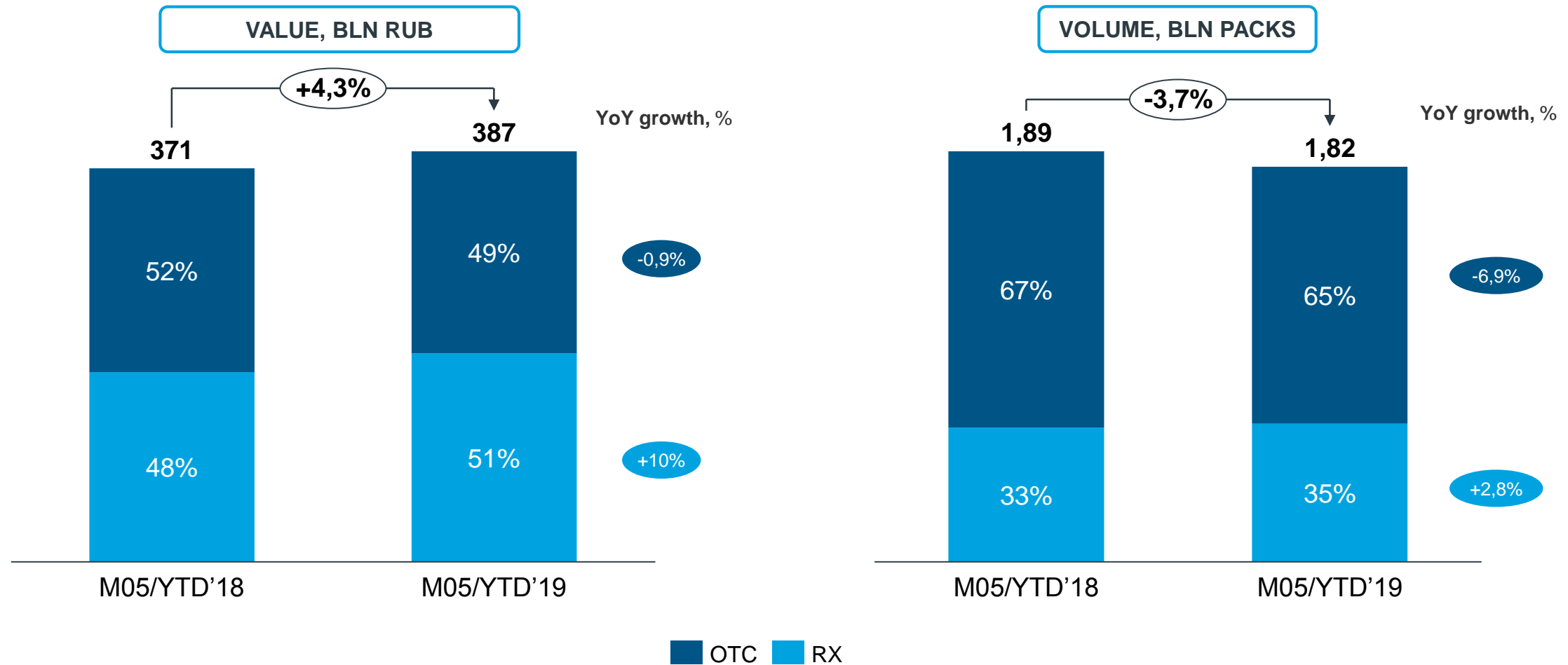
**Ambulatory (Ministry of Health) segment contains data on MoH centralized programs purchases, including:**

- Target program: Providing certain categories of citizens with drugs on an outpatient basis specified in PP №156 from March 11, 2011 (vaccination calendar);
- Target program: Prevention of socially significant infectious diseases specified in PP №1512 from December 28, 2016 (Hepatitis, HIV, tuberculosis etc)



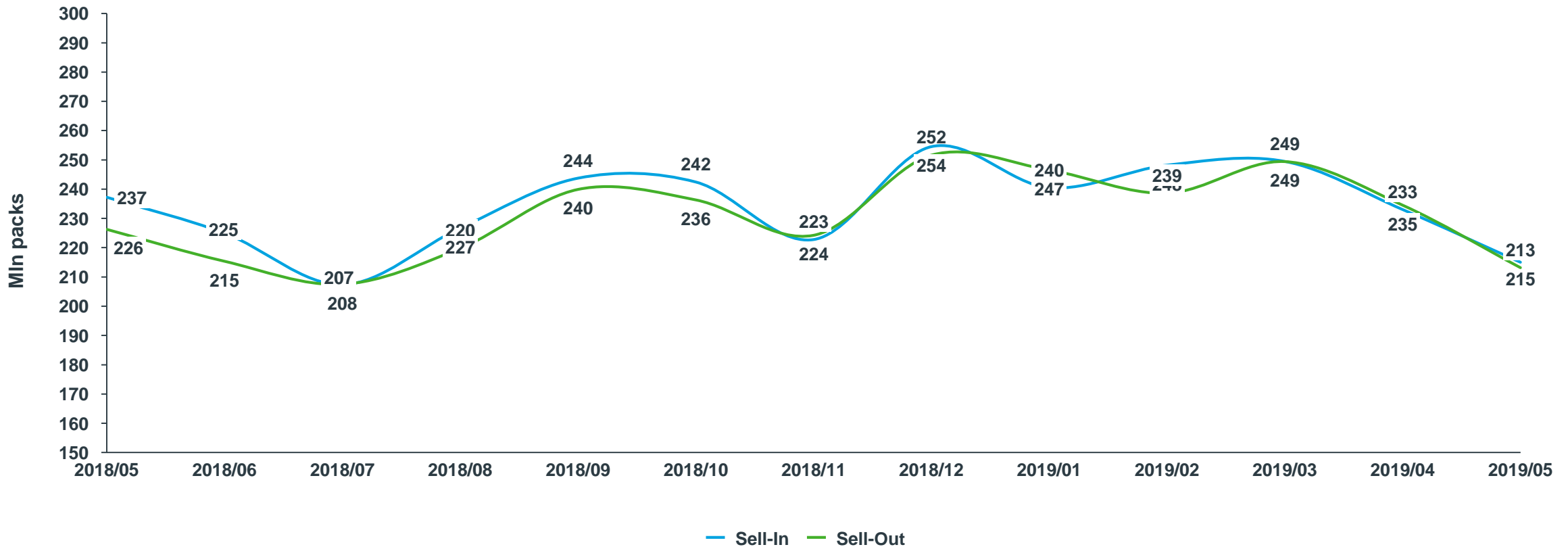
# Russian pharma market growth in January-May 2019

Retail Sell-Out: Market grew by 4,3% in value and decreased by 3,7% in volume



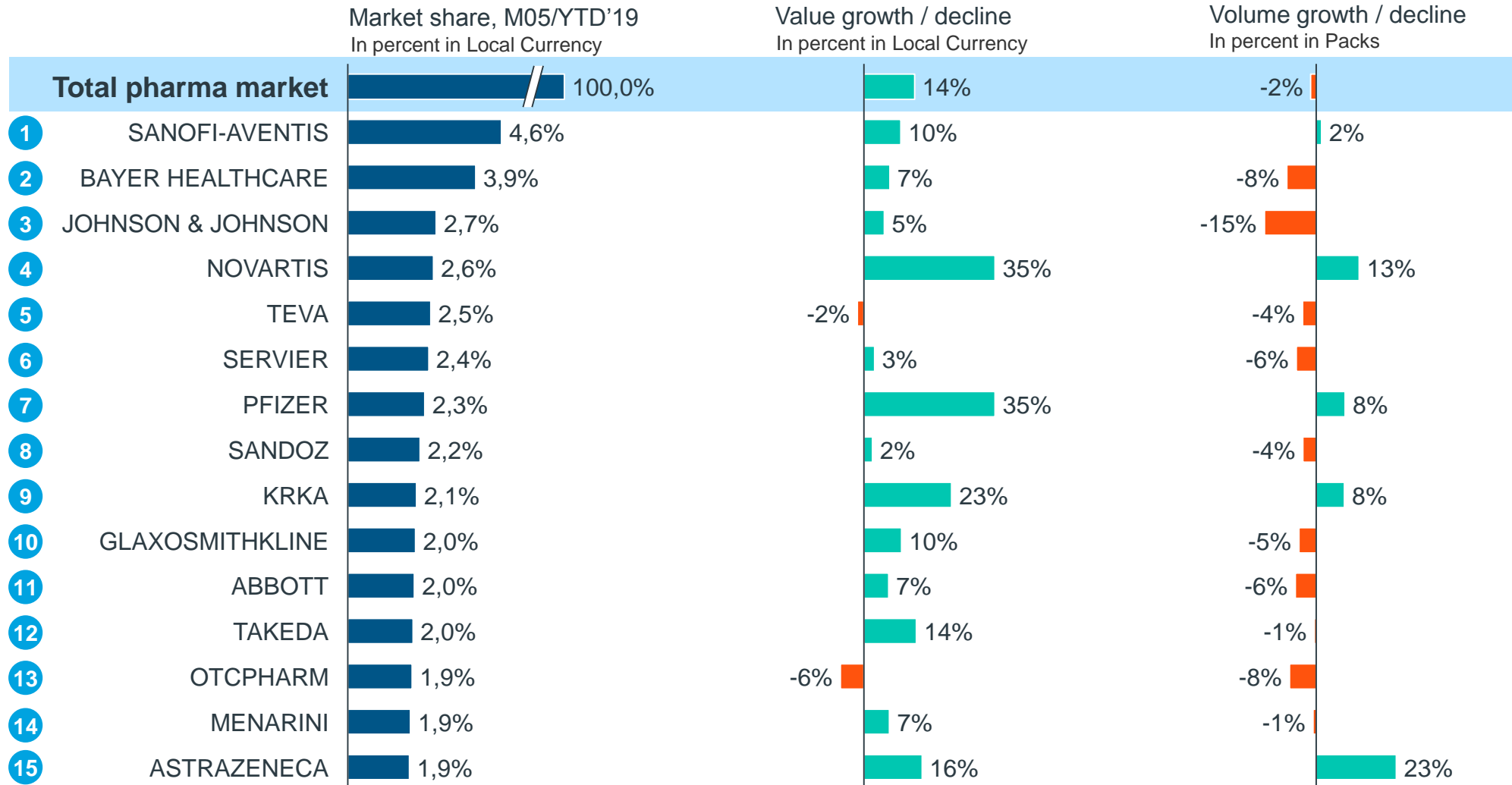


# Sell-In vs Sell-Out, OTC registered drugs



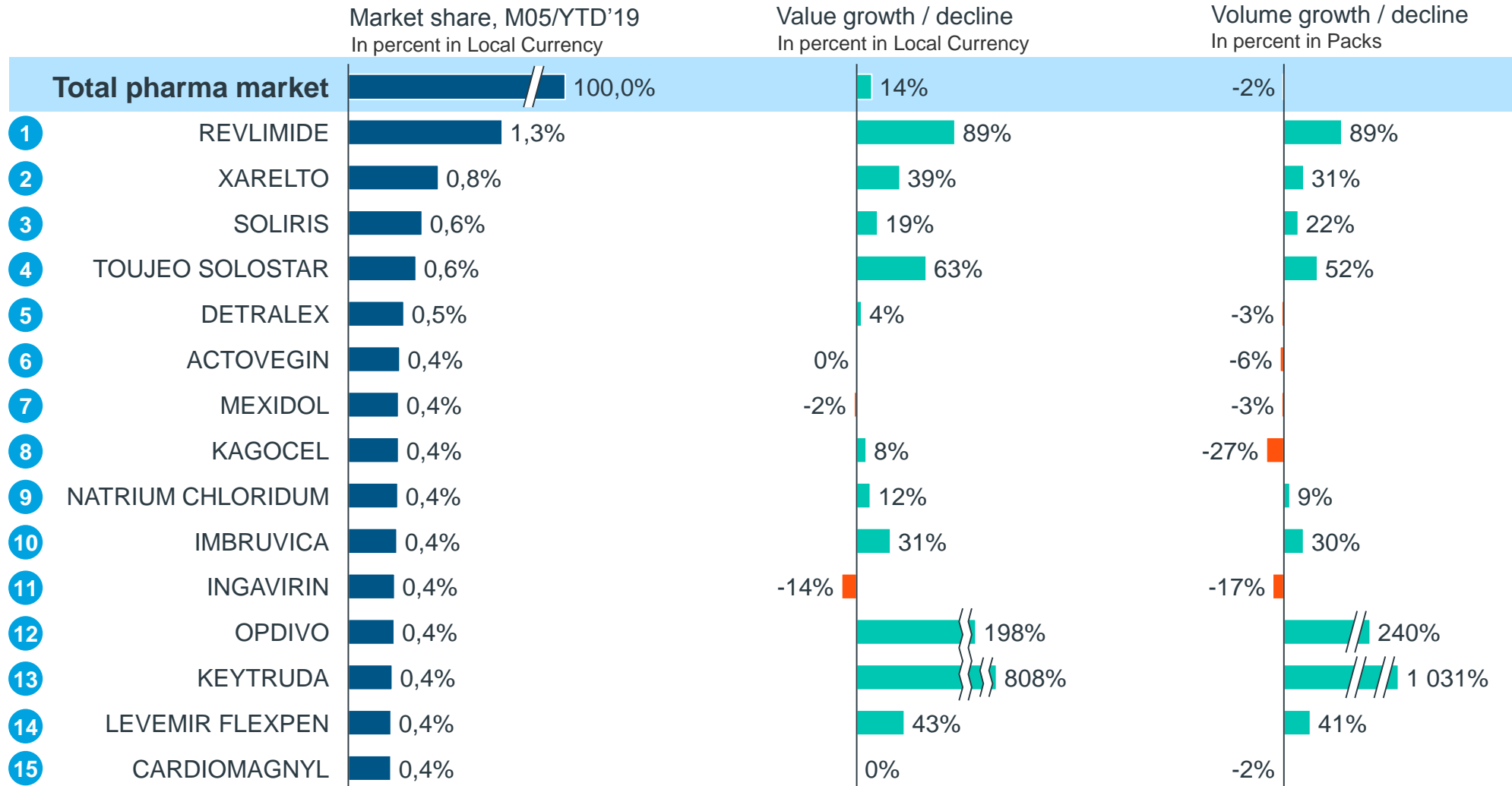


# TOP-15 corporations on Russian market, January-May 2019

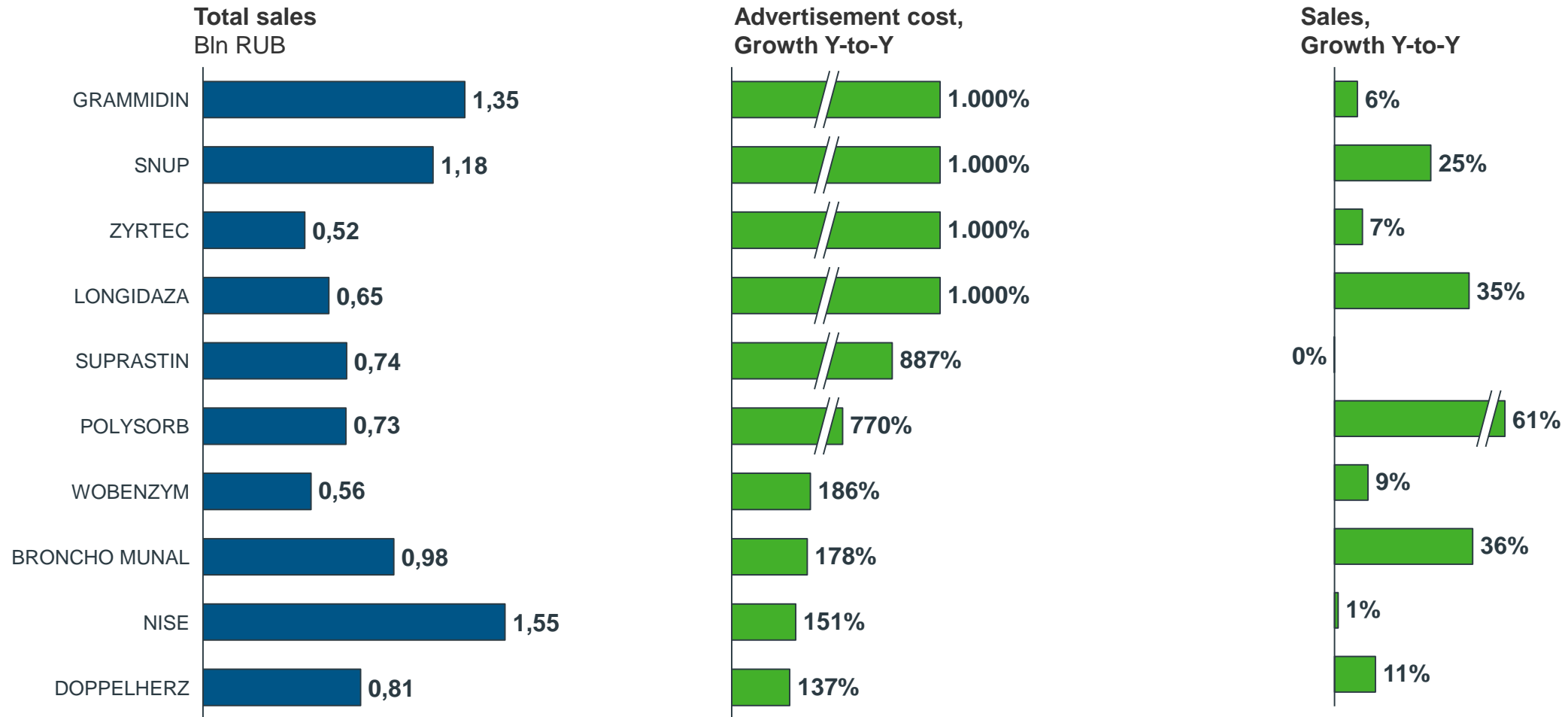




# TOP-15 brands on Russian market, January-May 2019



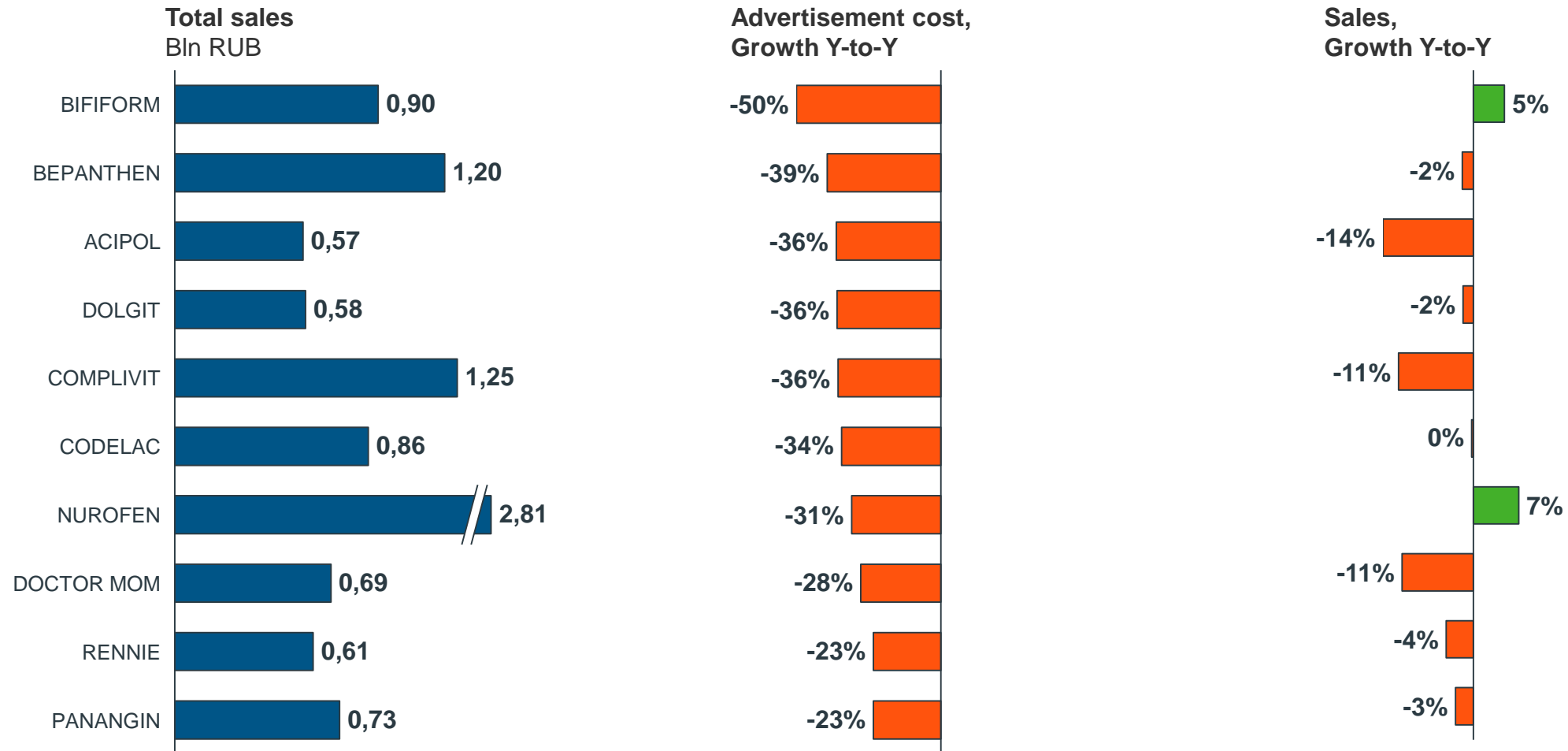
# TOP-10 products by growth in advertisement investments in January-May 2019



The rank is calculated among TOP-200 Brands by sales with advertising cost greater than 50 mln RUB  
 Source: IQVIA databases. Pharamtrend, Mediascope data, FIN Prices



# TOP-10 products by decline in advertisement investments in January-May 2019

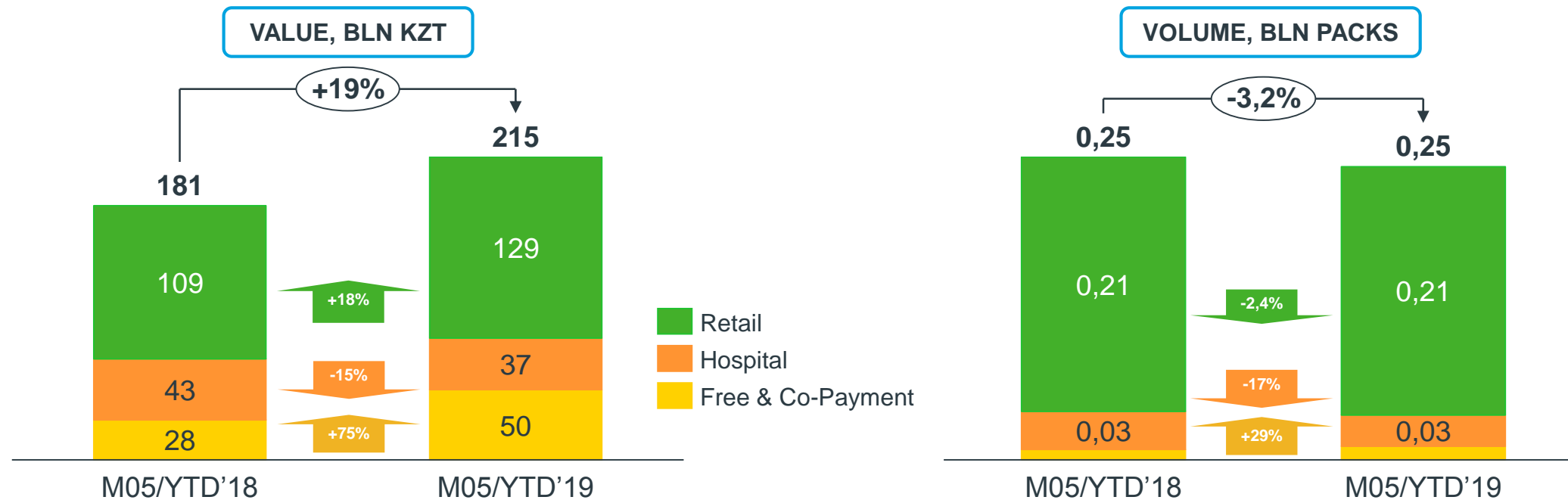


The rank is calculated among TOP-200 Brands by sales with advertising cost greater than 50 mln RUB  
 Source: IQVIA databases, Pharamtrend, Mediascope data, FIN Prices



# Kazakhstan pharma market growth in January-May 2019

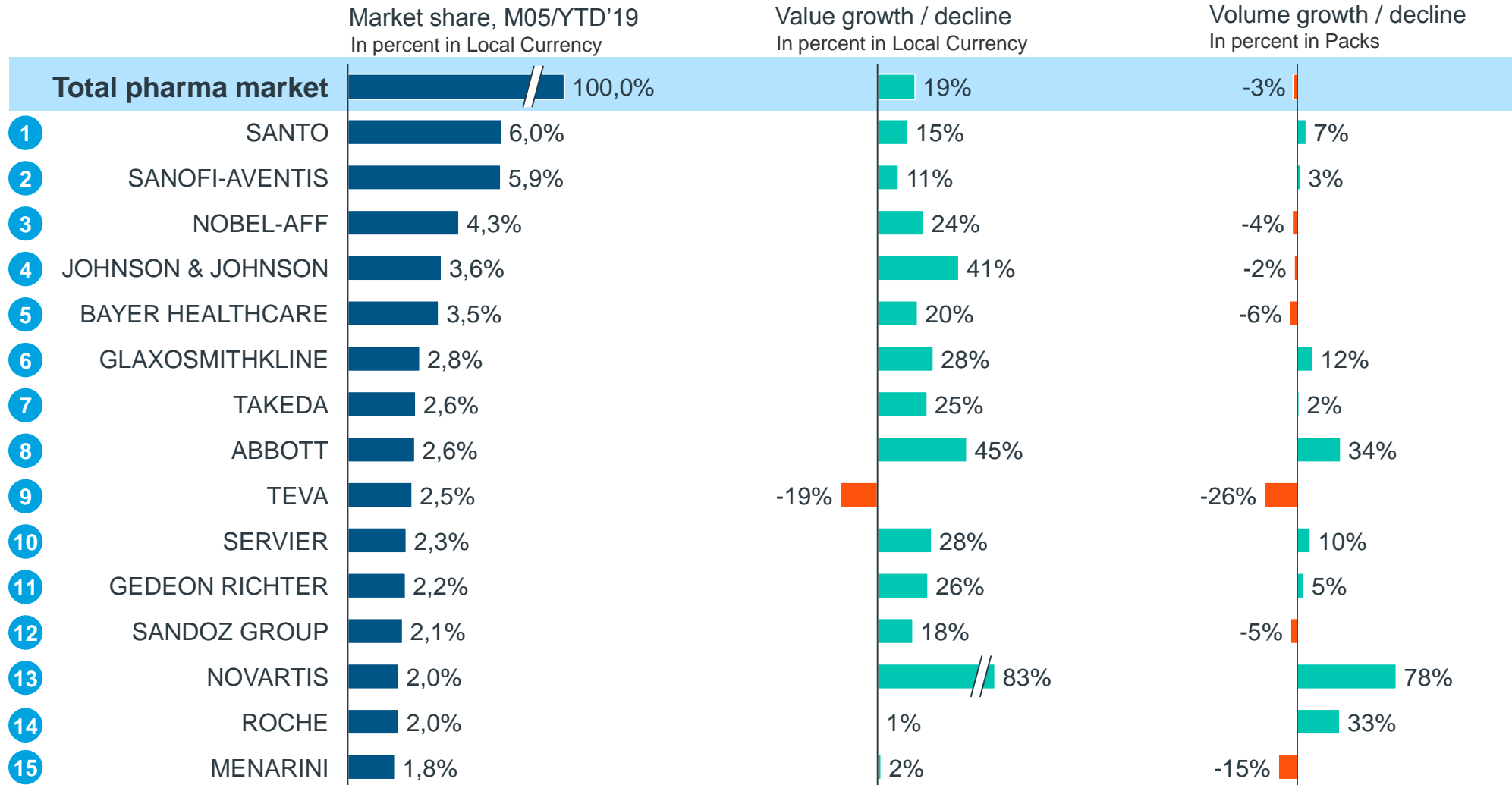
Market grew by 19% in value and decreased by 3,2% in volume



Indicator	KZT	USD	EUR	PACKS
Value M05/YTD'19, Bln.	215	0,57	0,50	0,25
Growth M05/YTD'19%	▲ 19%	▲ 1,9%	▲ 10%	▼ -3,2%

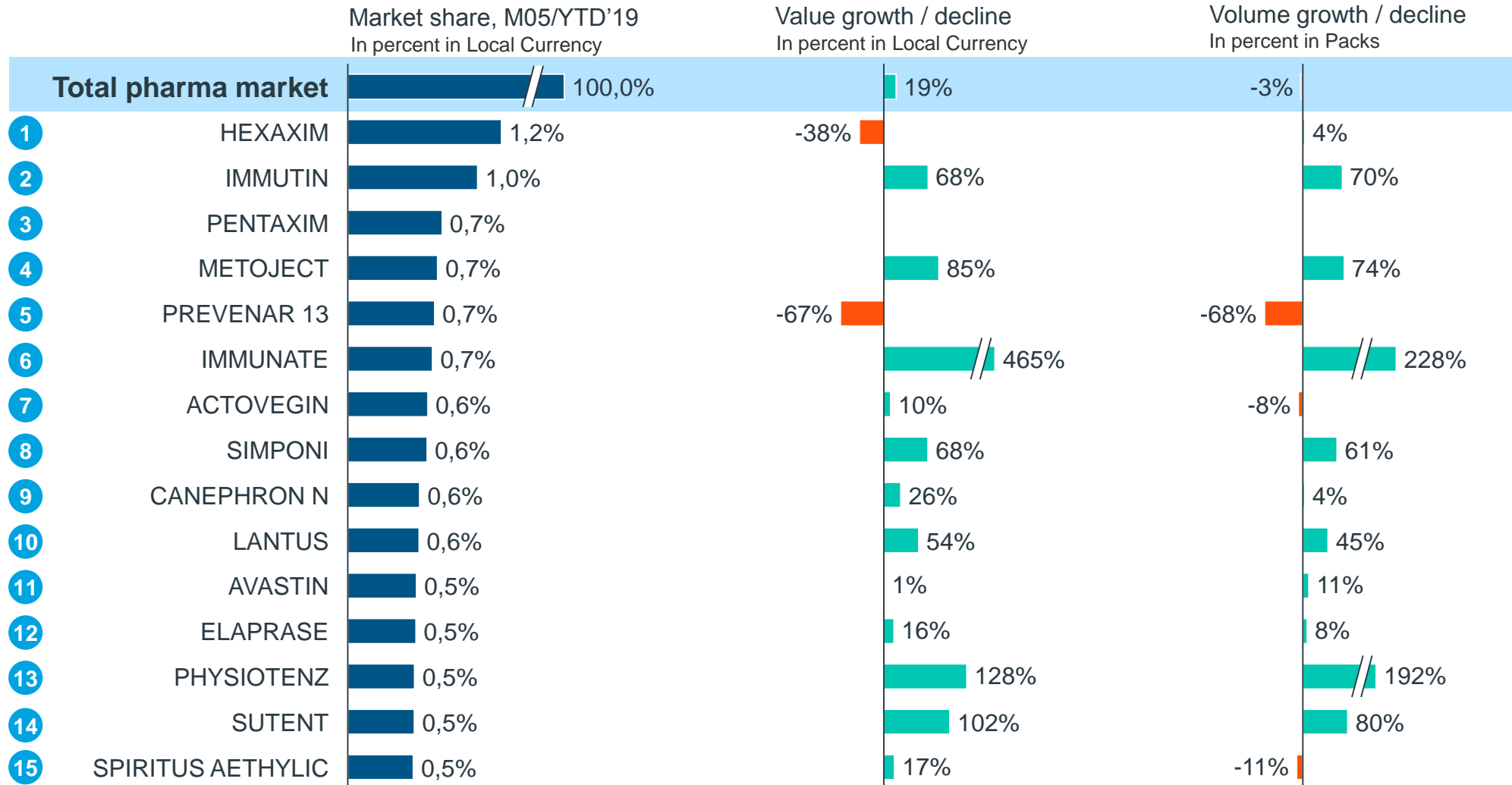


# TOP-15 corporations on Kazakhstan market, January-May 2019





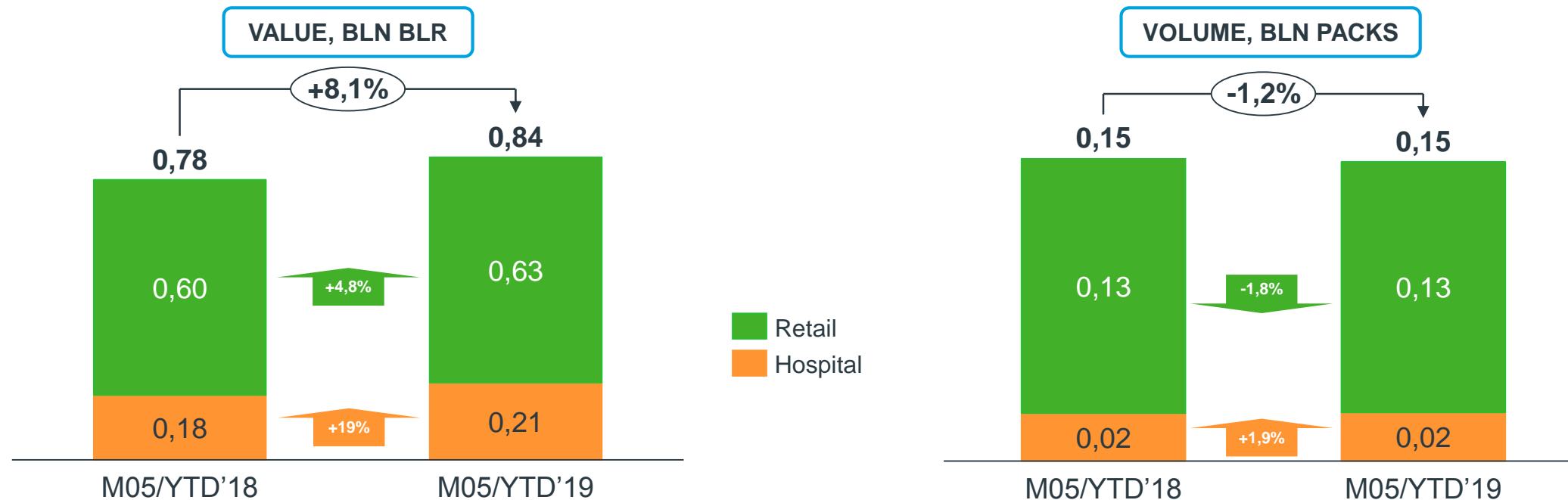
# TOP-15 brands on Kazakhstan market, January-May 2019





# Belarus pharma market growth in January-May 2019

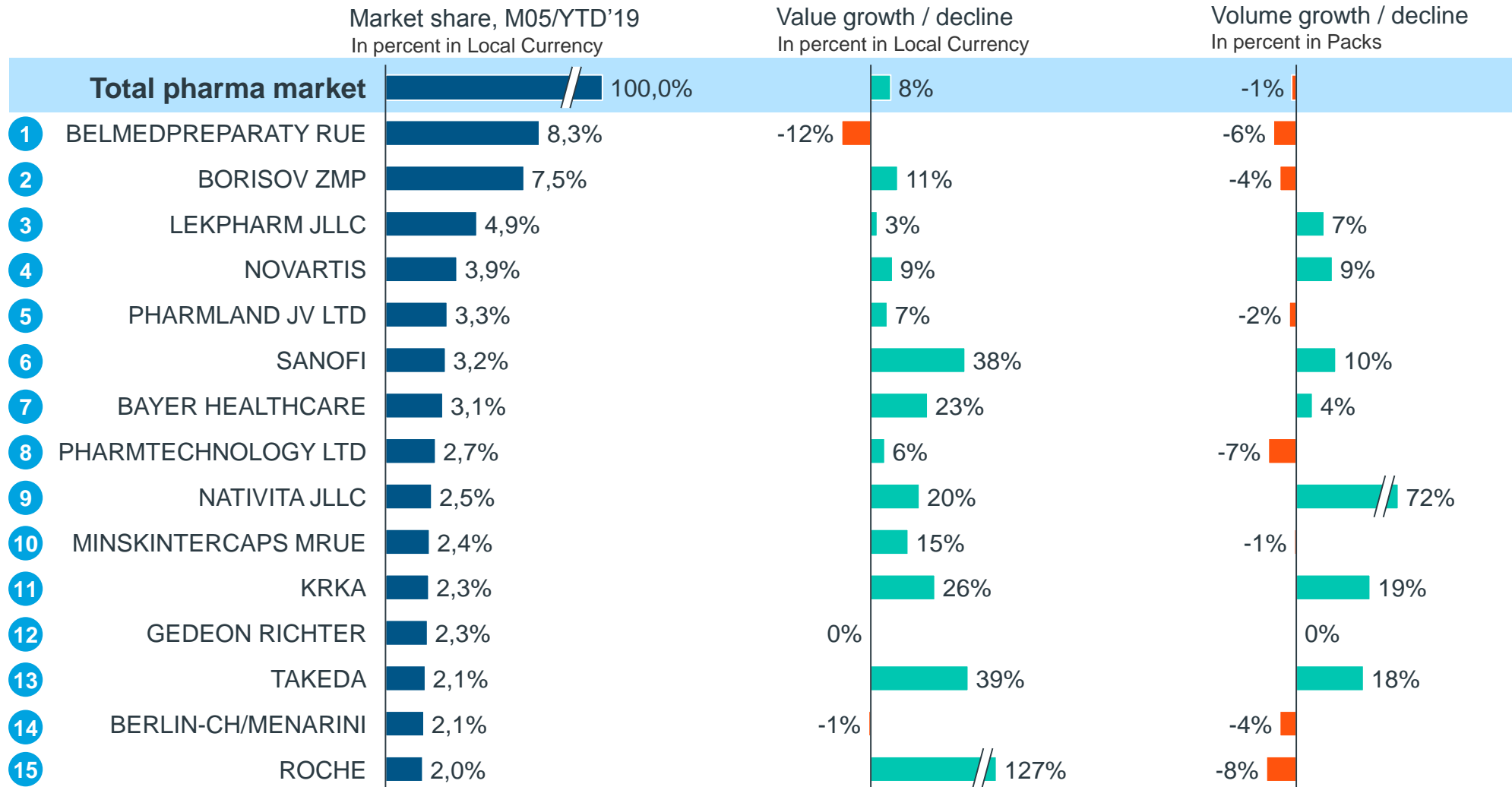
Market grew by 8,1% in value and decreased by 1,2% in volume



Indicator	BLR	USD	EUR	PACKS
Value M05/YTD'19, Bln.	0,84	0,40	0,35	0,15
Growth M05/YTD'19%	▲ 8,1%	▲ 0,7%	▲ 8,8%	▼ -1,2%

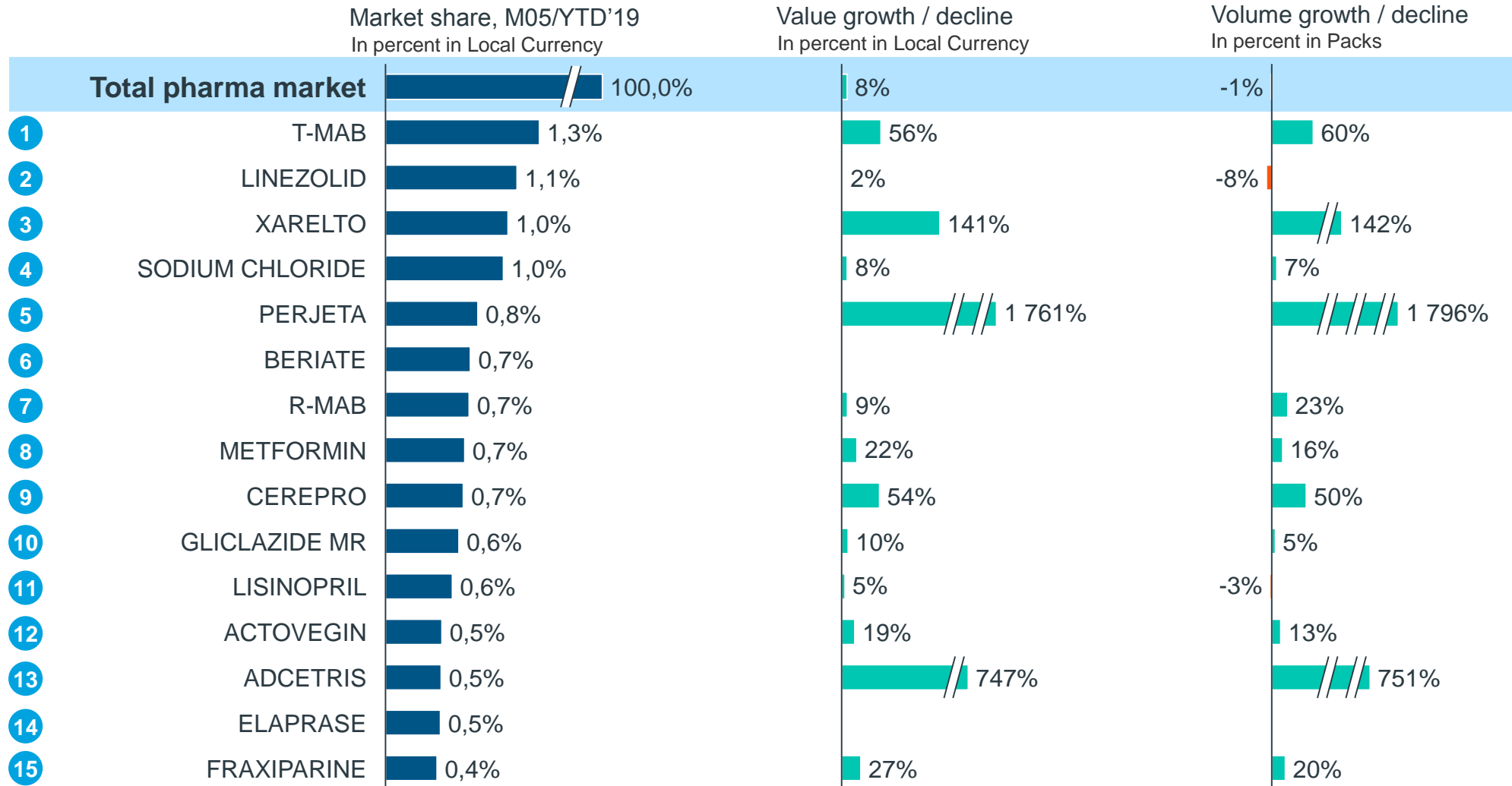


# TOP-15 corporations on Belarus market, January-May 2019





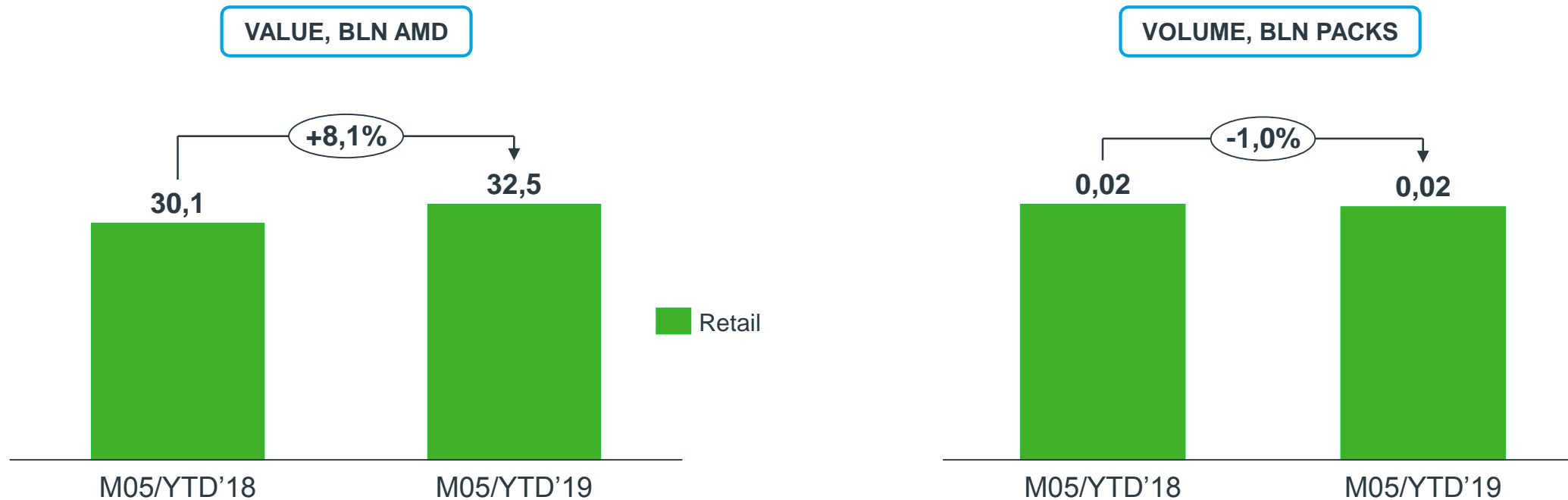
# TOP-15 brands on Belarus market, January-May 2019





# Armenia pharma market growth in January-May 2019

Market grew by 8,1% in value and decreased by 1,0% in volume

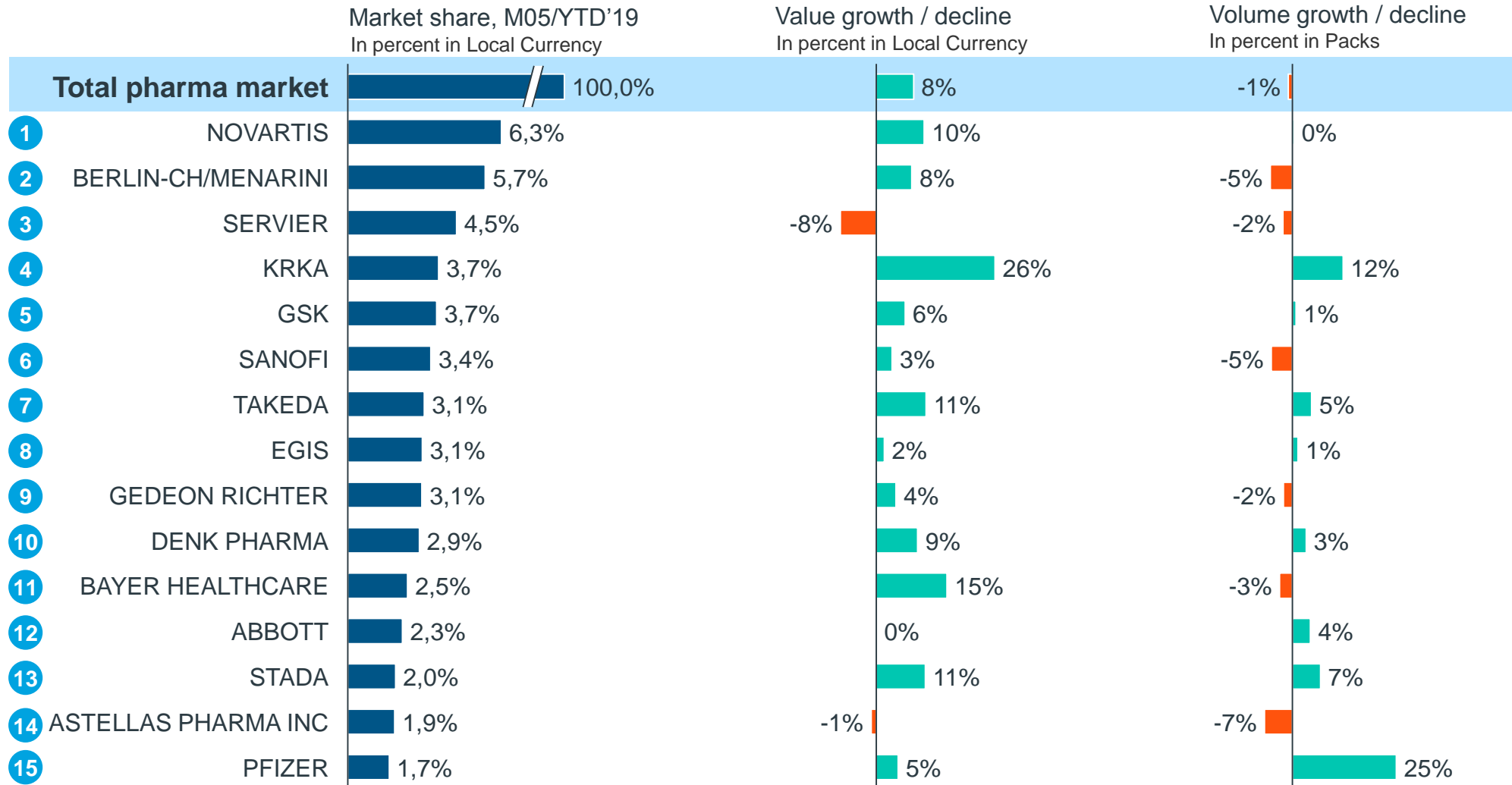


Indicator	AMD	USD	EUR	PACKS
Value M05/YTD'19, Bln.	32	0,1	0,1	0,02
Growth M05/YTD'19%	▲ 8,1%	▲ 7,4%	▲ 16%	▼ -1,0%



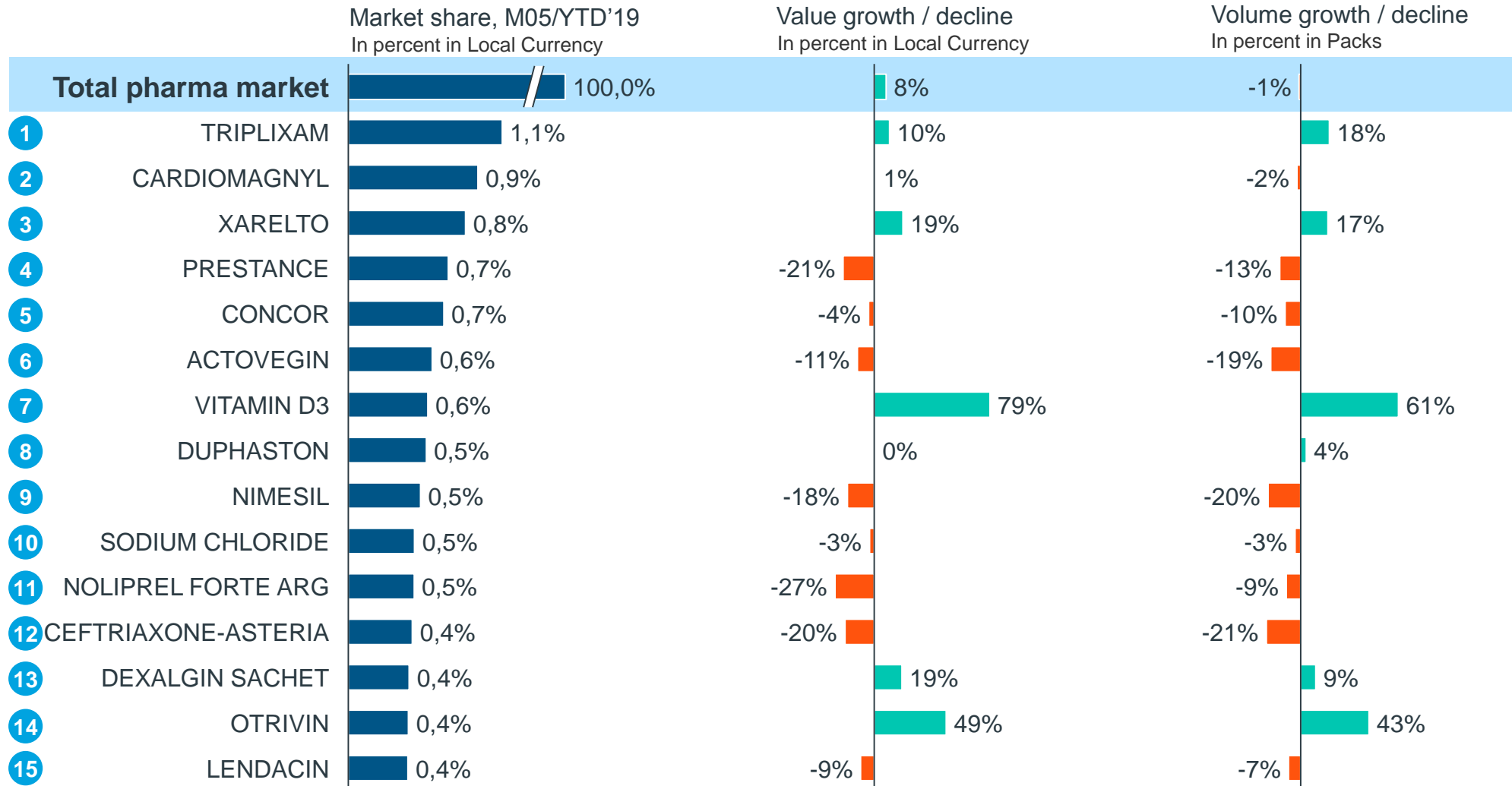


# TOP-15 corporations on Armenia market, January-May 2019





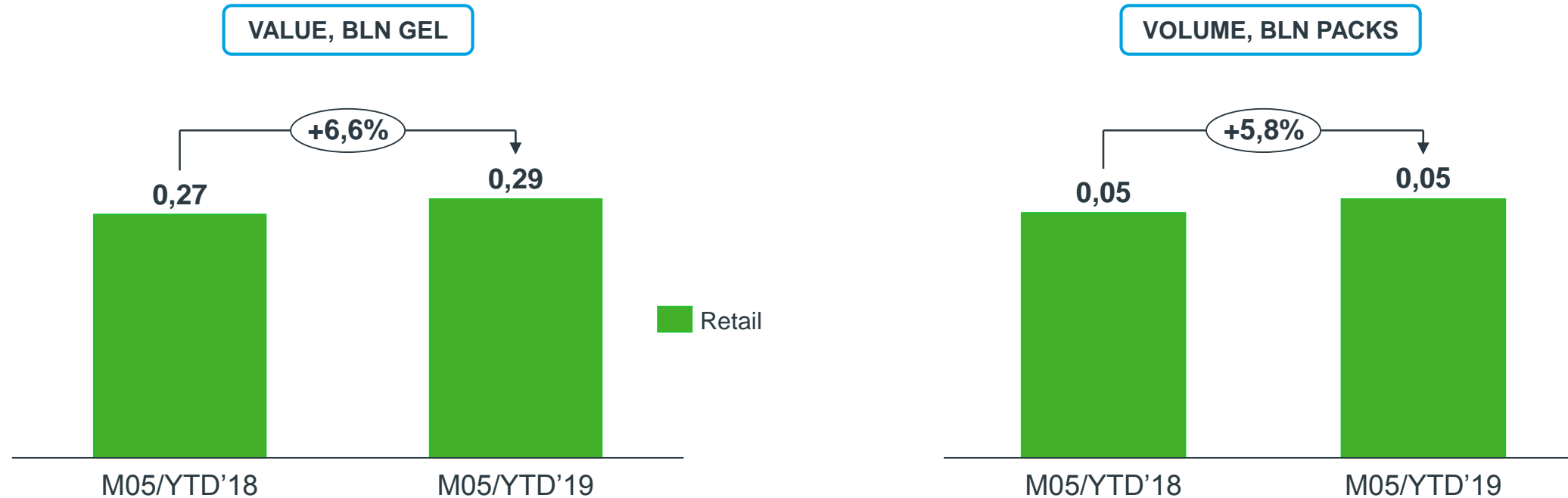
# TOP-15 brands on Armenia market, January-May 2019





# Georgia pharma market growth in January-May 2019

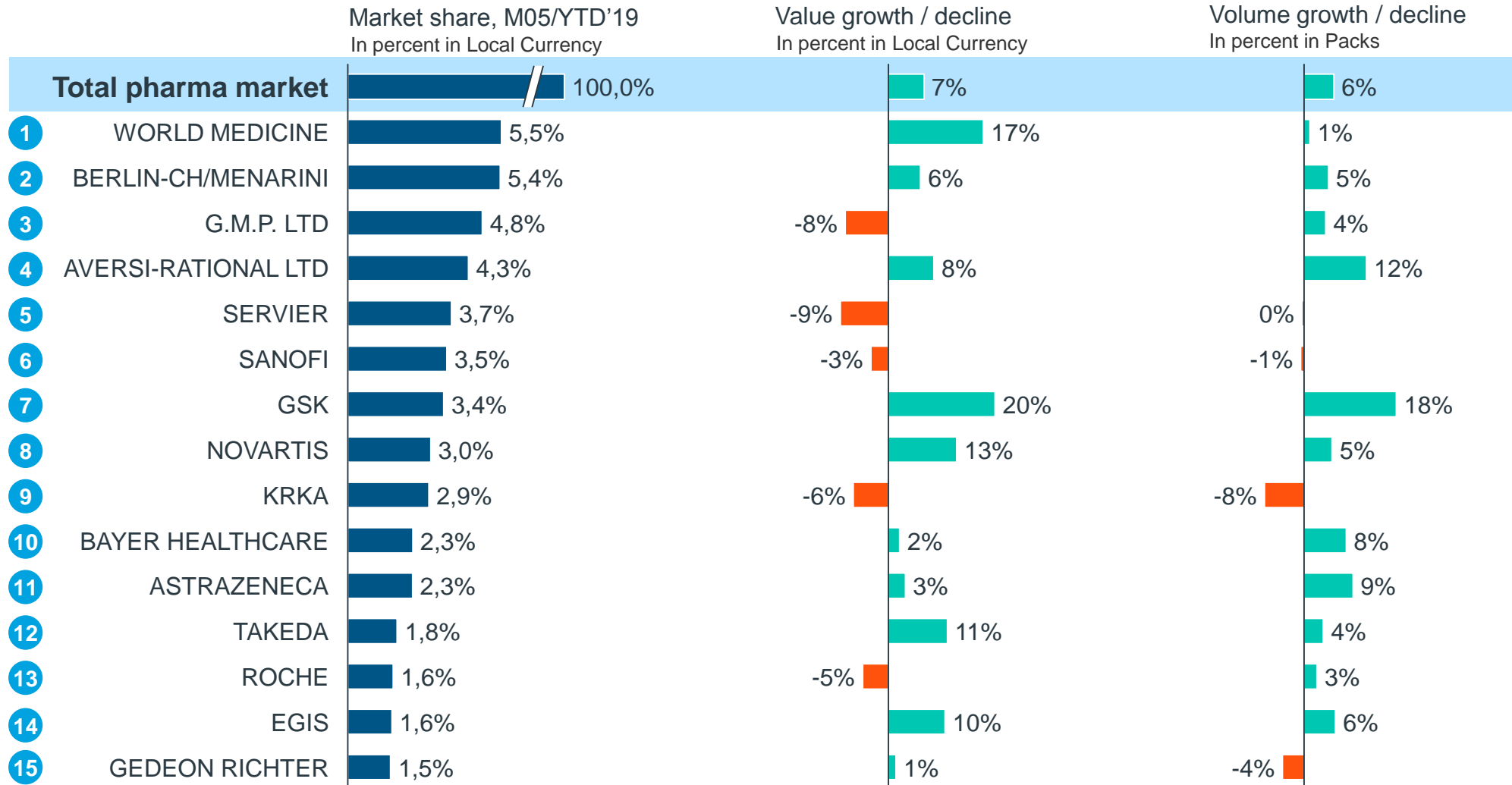
Market grew by 6,6% in value and by 5,8% in volume



Indicator	GEL	USD	EUR	PACKS
Value M05/YTD'19, Bln.	0,29	0,11	0,10	0,05
Growth M05/YTD'19%	▲ 6,6%	▼ -2,5%	▲ 5,6%	▲ 5,8%

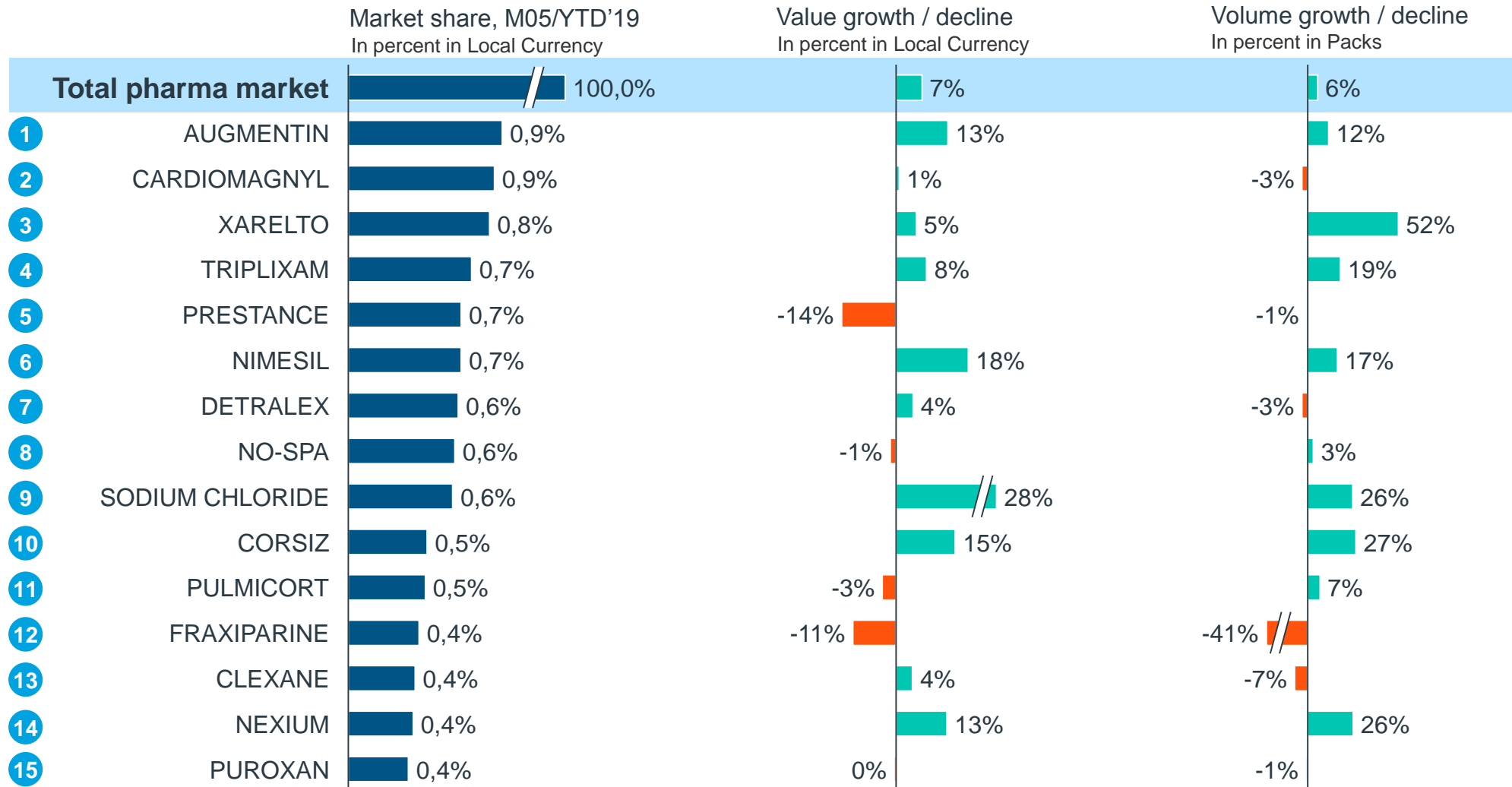


# TOP-15 corporations on Georgia market, January-May 2019





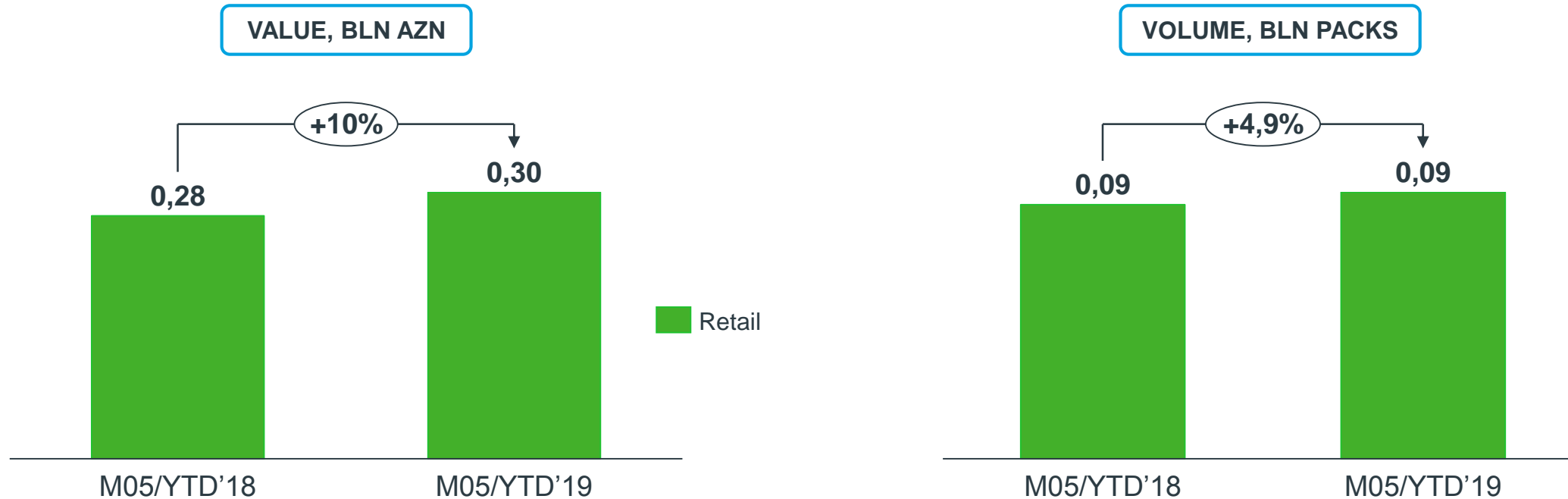
# TOP-15 brands on Georgia market, January-May 2019





# Azerbaijan pharma market growth in January-May 2019

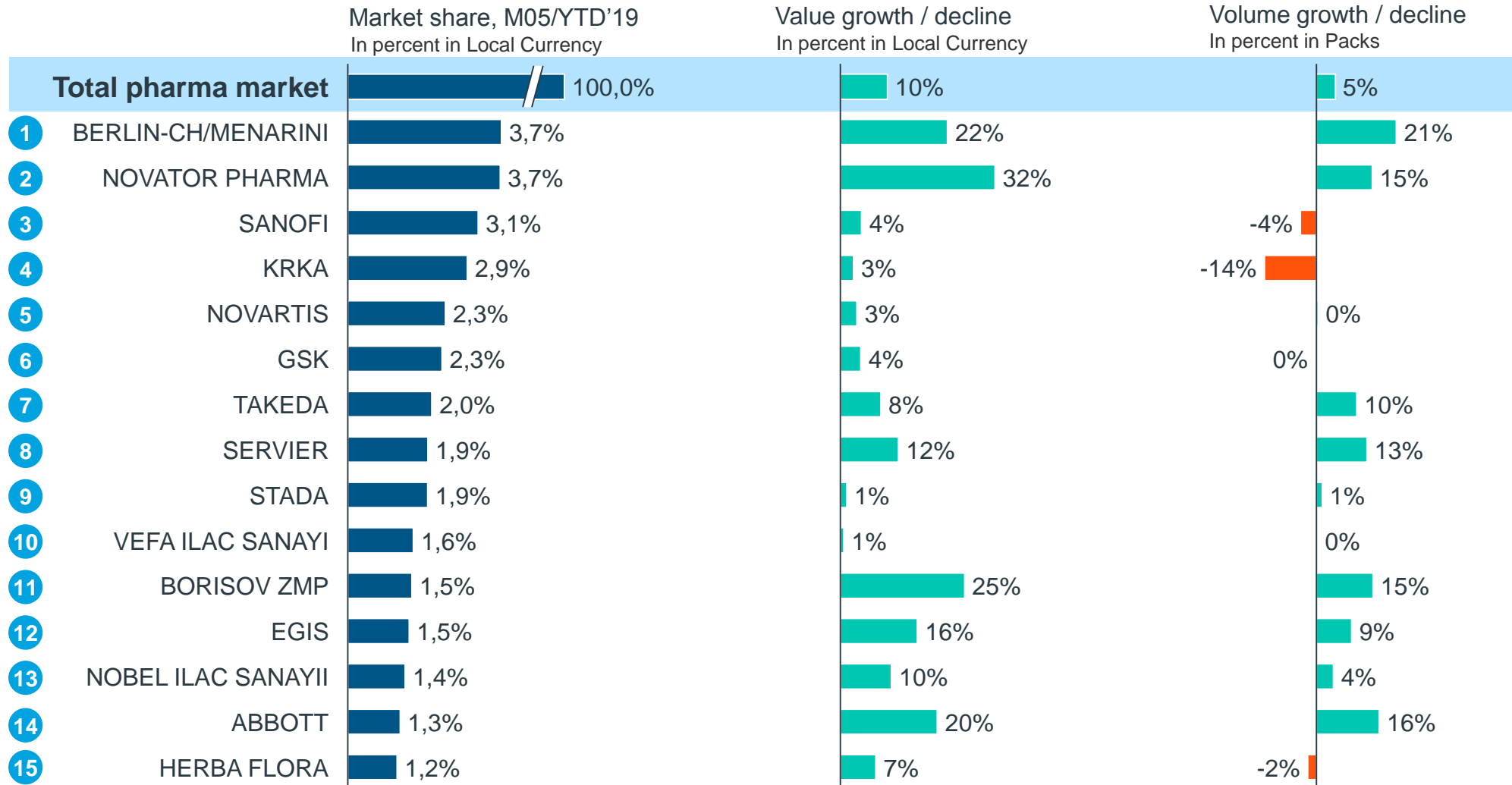
Market grew by 10% in value and by 4,9% in volume



Indicator	AZN	USD	EUR	PACKS
Value M05/YTD'19, Bln.	0,30	0,18	0,16	0,09
Growth M05/YTD'19, %	▲ 10%	▲ 10%	▲ 18%	▲ 4,9%

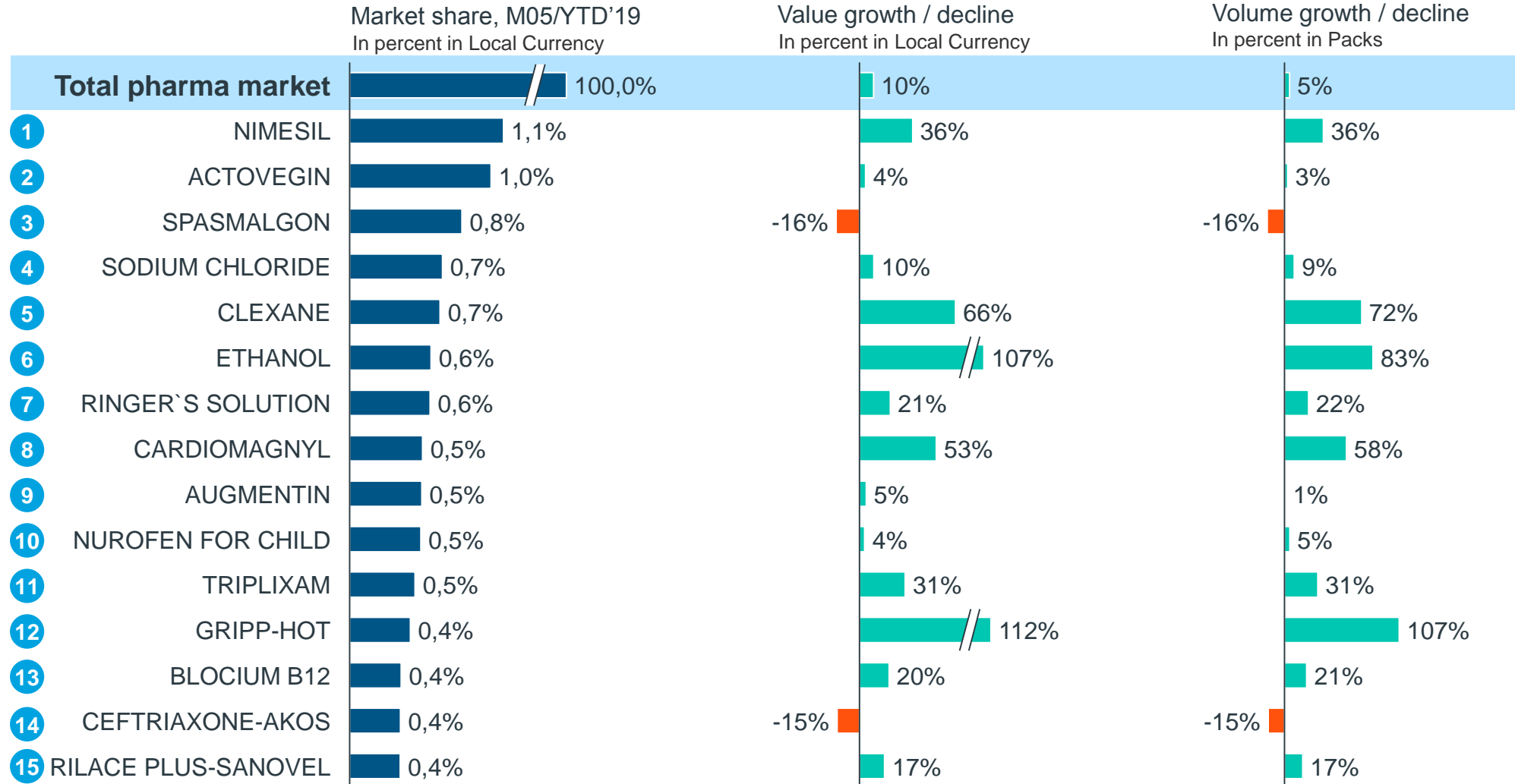


# TOP-15 corporations on Azerbaijan market, January-May 2019





# TOP-15 brands on Azerbaijan market, January-May 2019





# Please Contact Us for More Information



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