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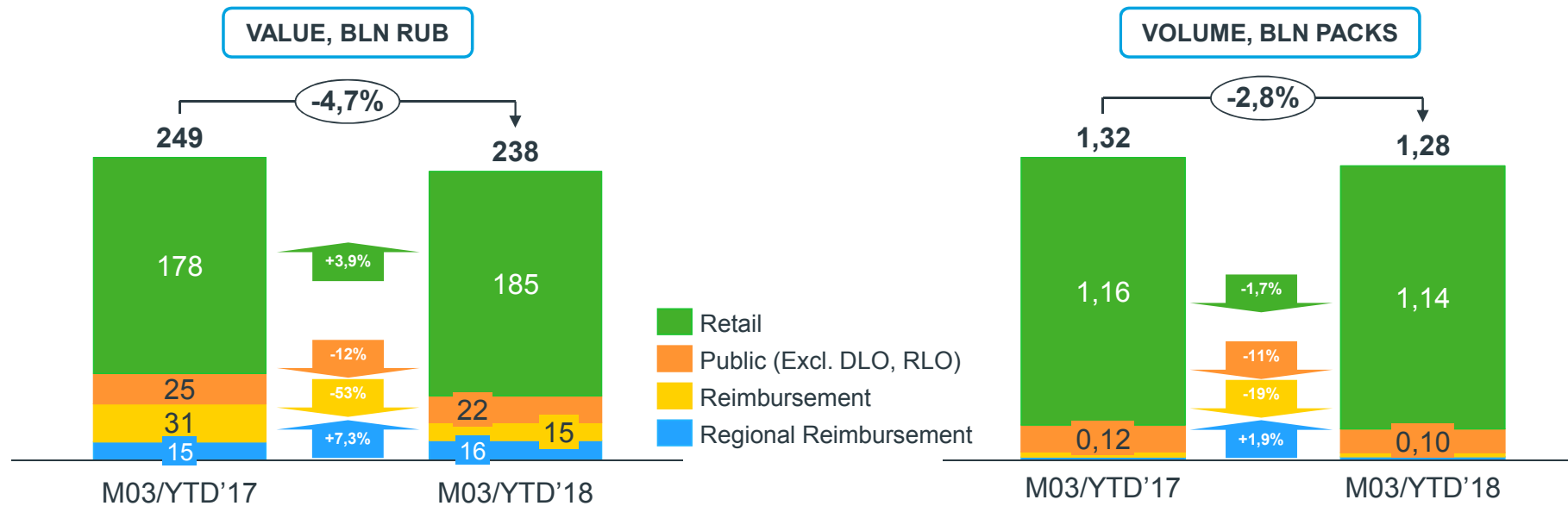
Facts from IQVIA

M03 2018



Russia pharma market growth in January-March 2018

Market decreases by -4,7% in value and -2,8% in volume



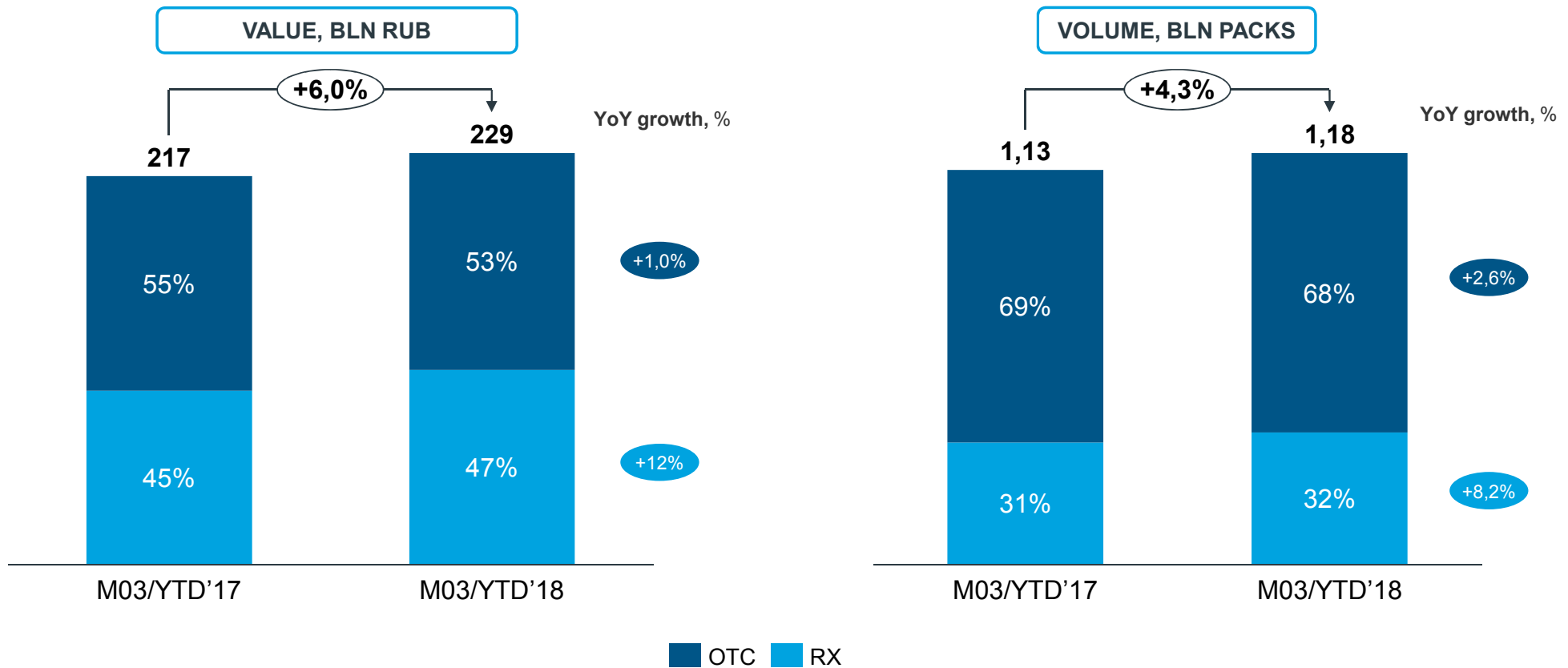
Indicator	RUB	USD	EUR	PACKS
Value M03/YTD 2018, Bln.	238	4,2	3,4	1,3
Growth M03/YTD,%	▼ -4,7%	▼ -1,3%	▼ -14%	▼ -2,8%

Source: IQVIA databases. Retail, Hospital, DLO, RLO (excluding food supplements and diagnostic agents), TRD Prices



Russia pharma market growth in January-March 2018

Retail Sell-Out: Market grew by 6,0% in value and 4,3% in volume



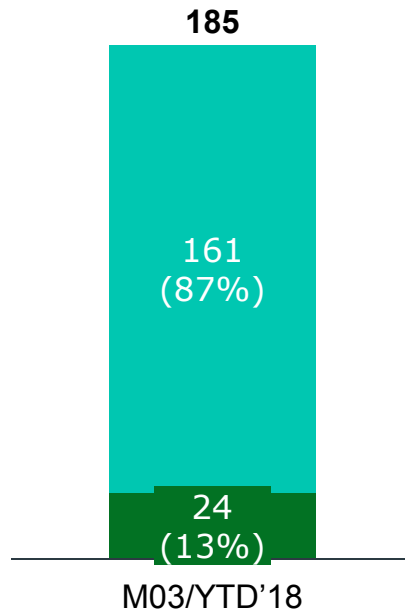
Source: Pharmatrend (excluding food supplements and diagnostic agents), FIN Prices



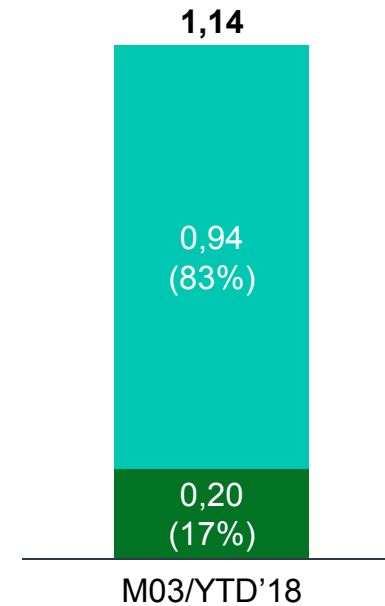
Russia retail market structure in January-March 2018

Retail Sell-In: Share of Pharmacy chains is 87% in value and 83% in volume

VALUE, BLN RUB



VOLUME, BLN PACKS



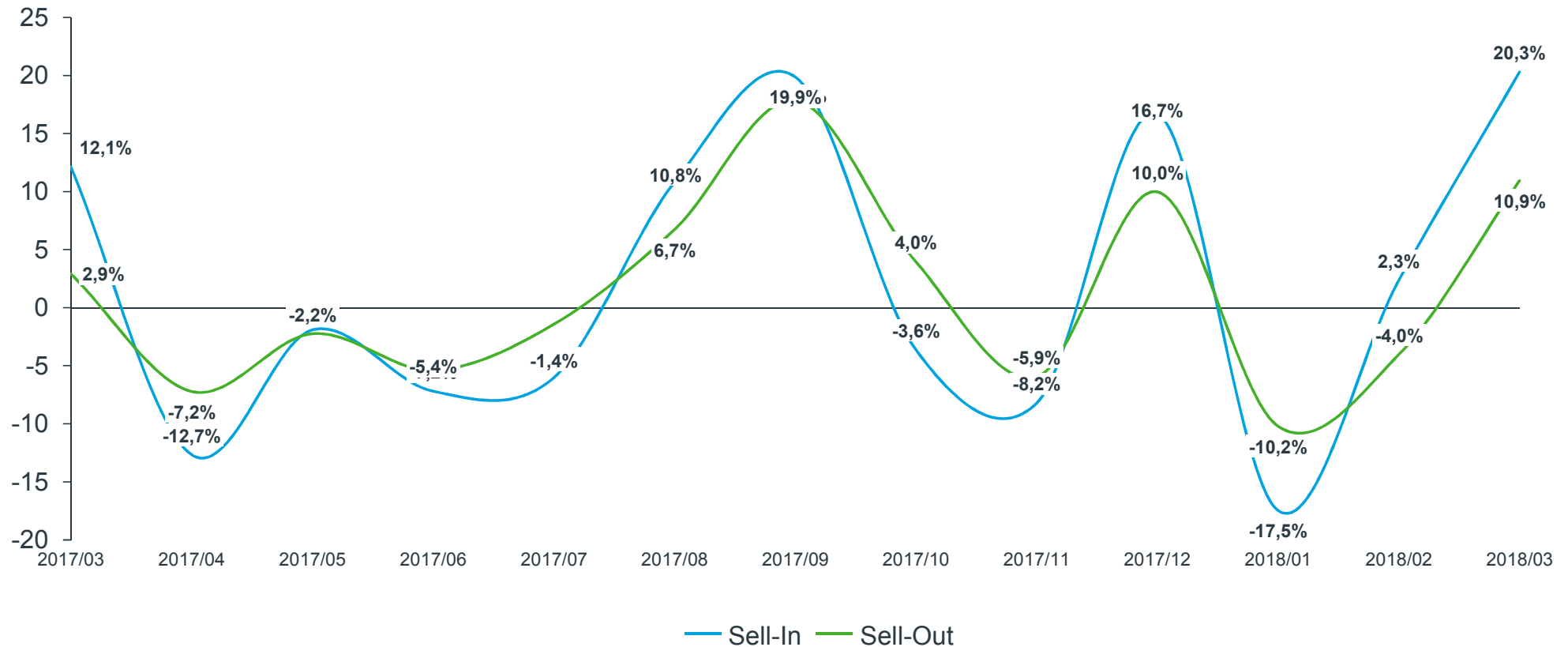
■ Pharmacy Chains
■ Individual pharmacies

Source: Retail Audit (excluding food supplements and diagnostic agents), TRD Prices
Pharmacy chain – 5 or more pharmacies operating under one brand or ownership



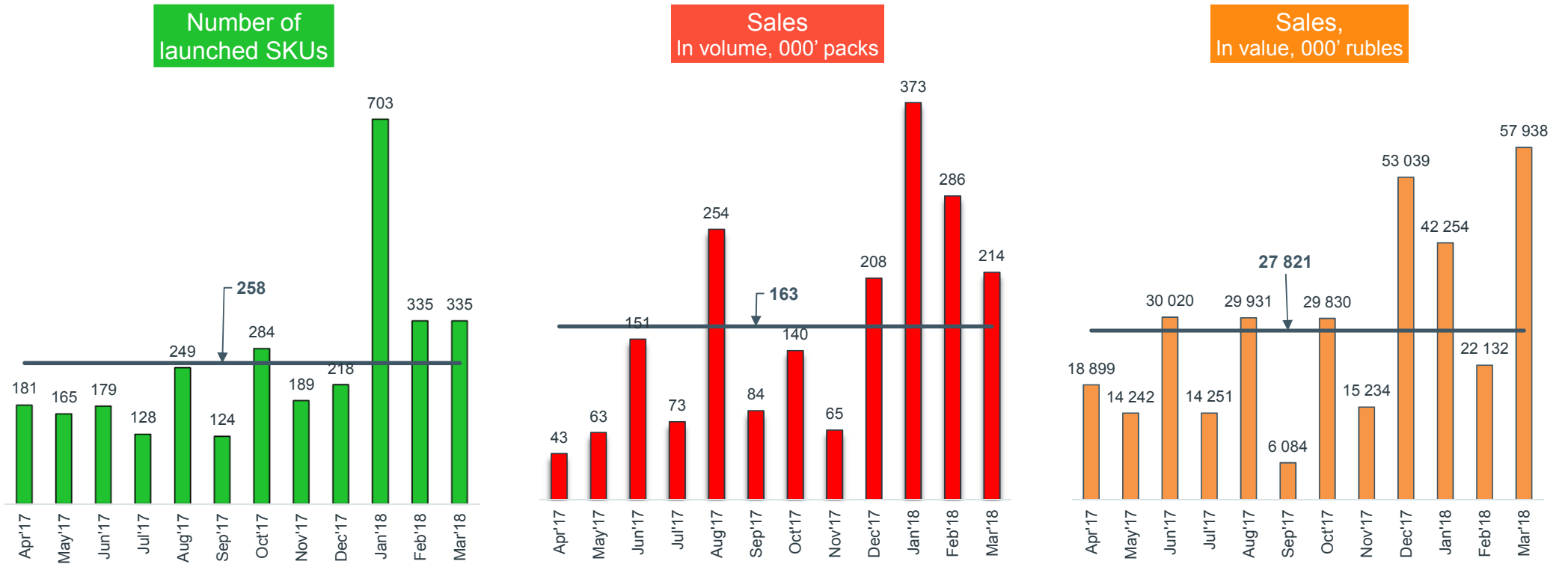
Sell-In vs Sell-Out, OTC registered drugs

Month-Over-Month Growth Rates, volume



Russia retail market, new launches

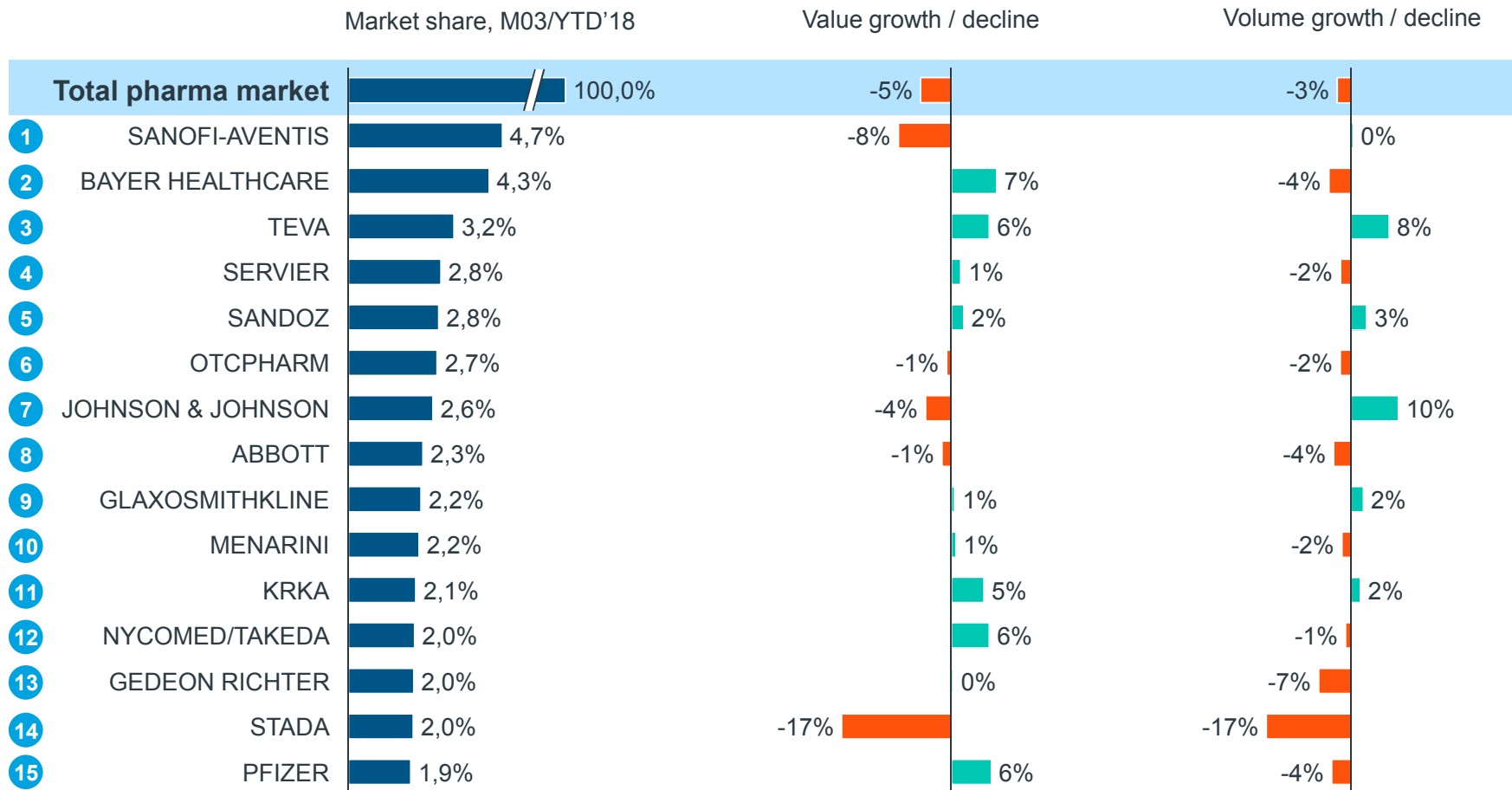
Retail Sell-Out: Number, value and volume of SKUs launched in past 12 months



Source: Pharmatrend. OTC, Rx and Food Supplements, FIN Prices



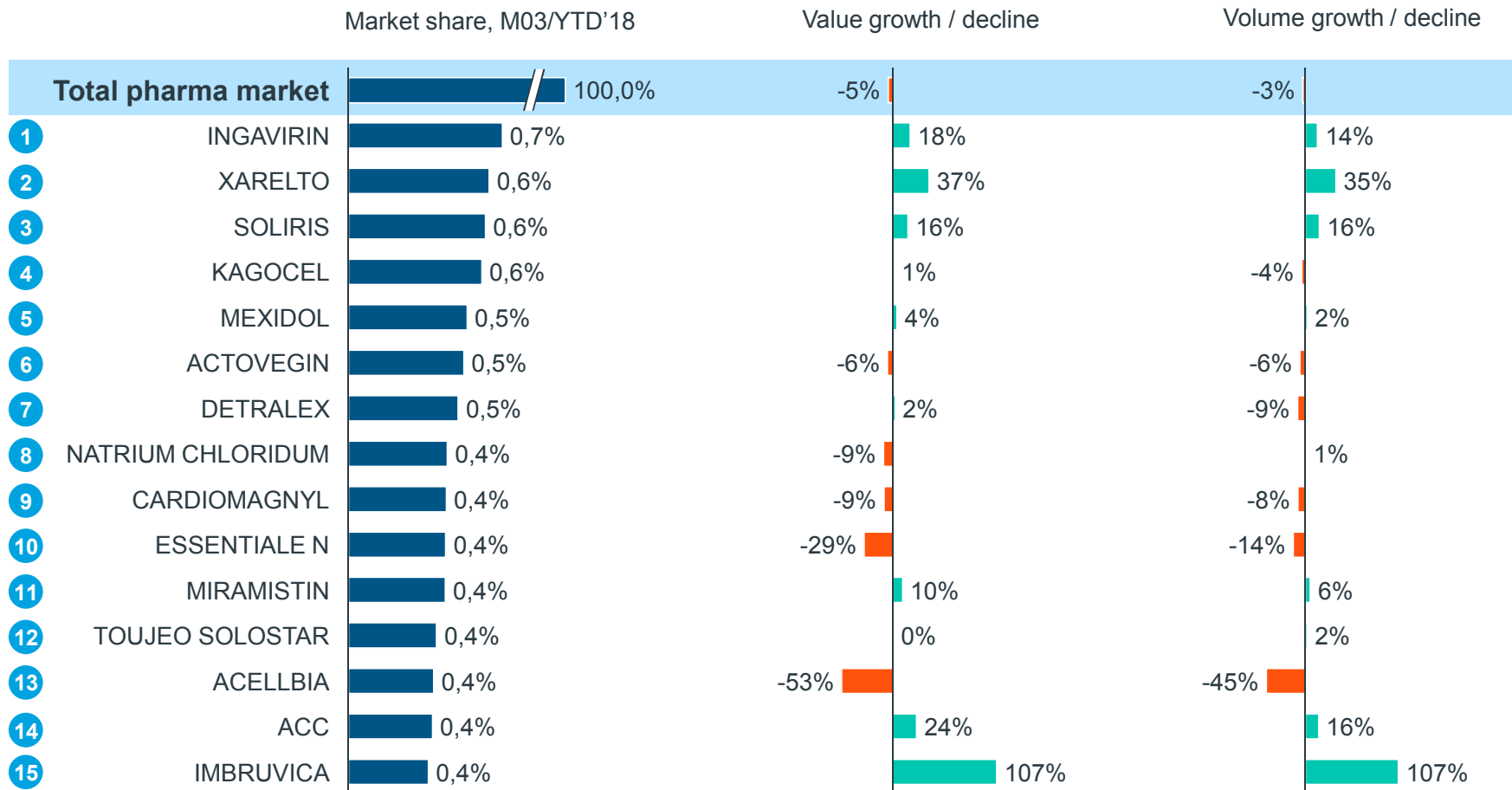
TOP-15 corporations on Russian market, January-March 2018



Source: IQVIA databases. Retail, Hospital, DLO, RLO (excluding food supplements and diagnostic agents), TRD Prices

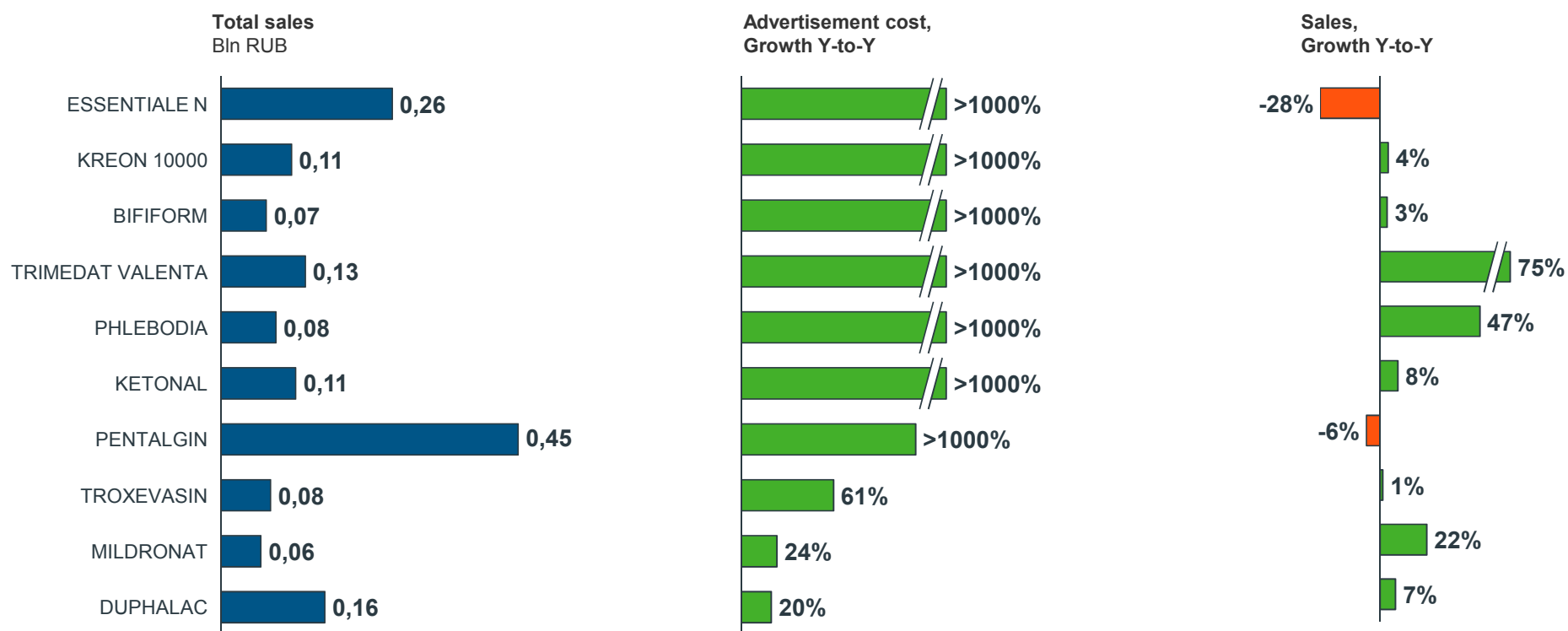


TOP-15 brands on Russian market, January-March 2018



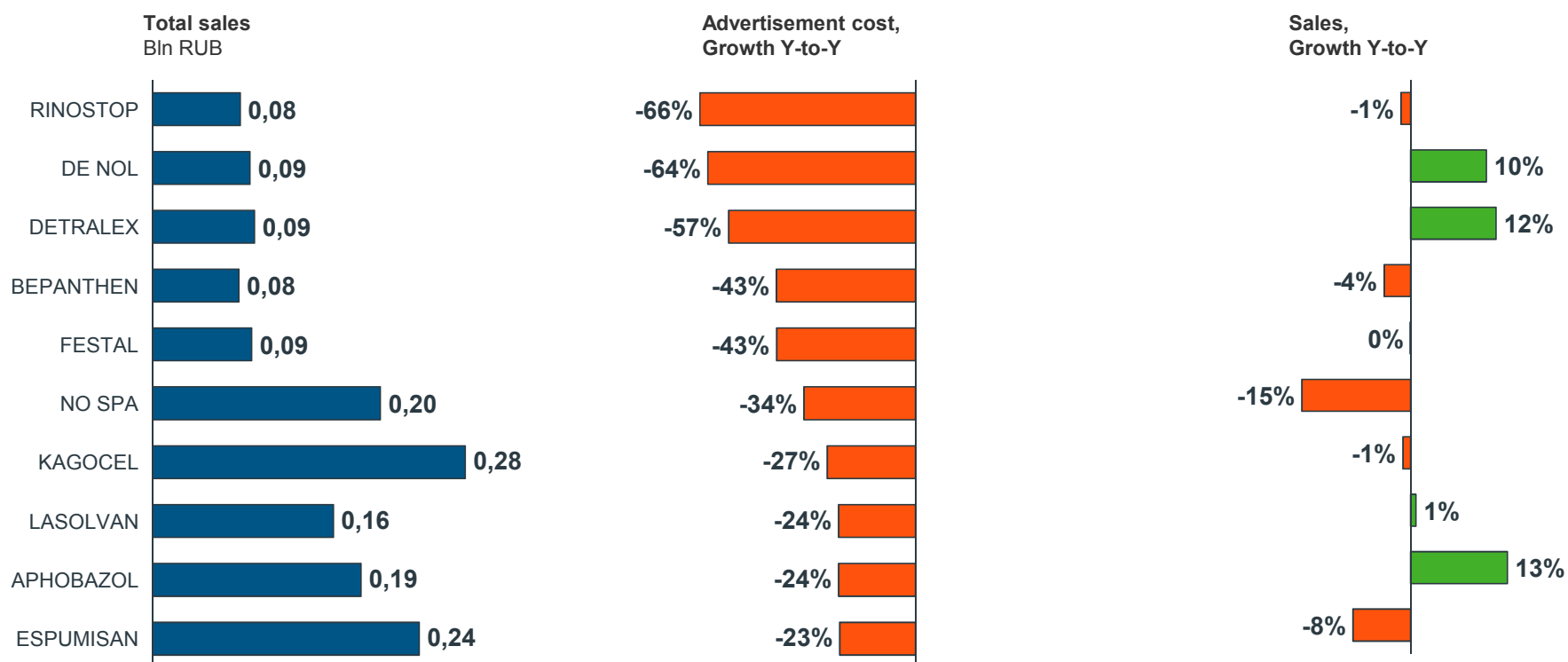
Source: IQVIA databases. Retail, Hospital, DLO, RLO (excluding food supplements and diagnostic agents), TRD Prices

TOP-10 products by growth in advertisement investments in January-March 2018



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

TOP-10 products by decline in advertisement investments in January-March 2018

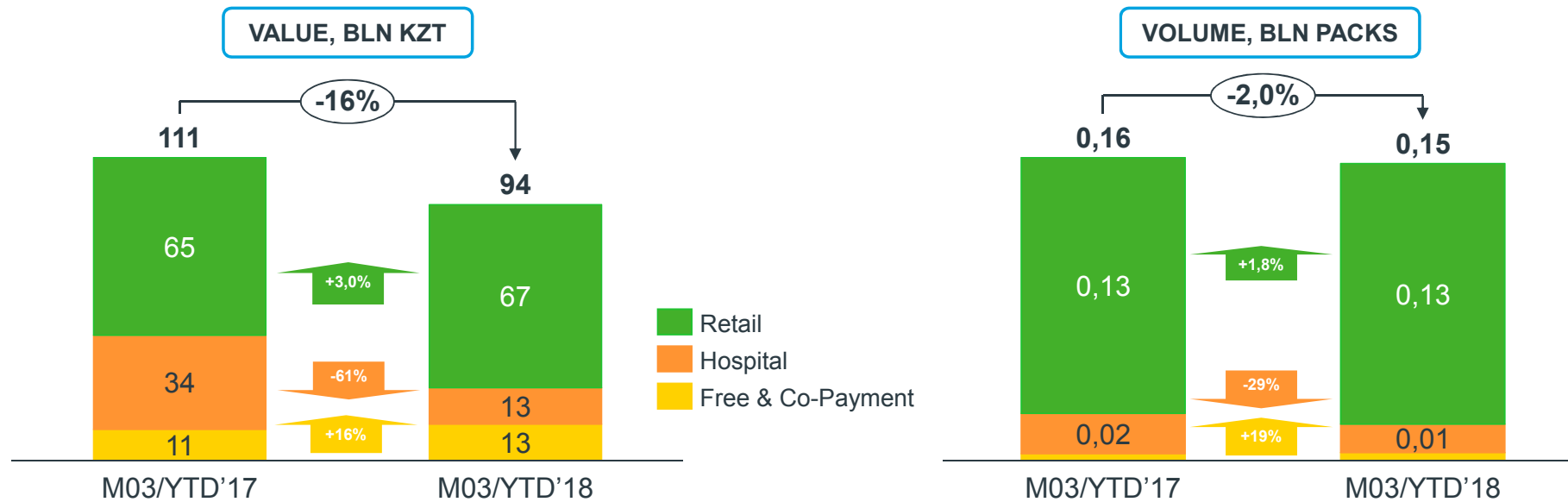


The rank is calculated among TOP-200 Products by sales with advertising cost greater than 50 mln RUB
 Source: IQVIA databases. Pharmatrend, Mediascope data, FIN Prices



Kazakhstan pharma market growth in January-March 2018

Market decreases by -16% in value and -2,0% in volume

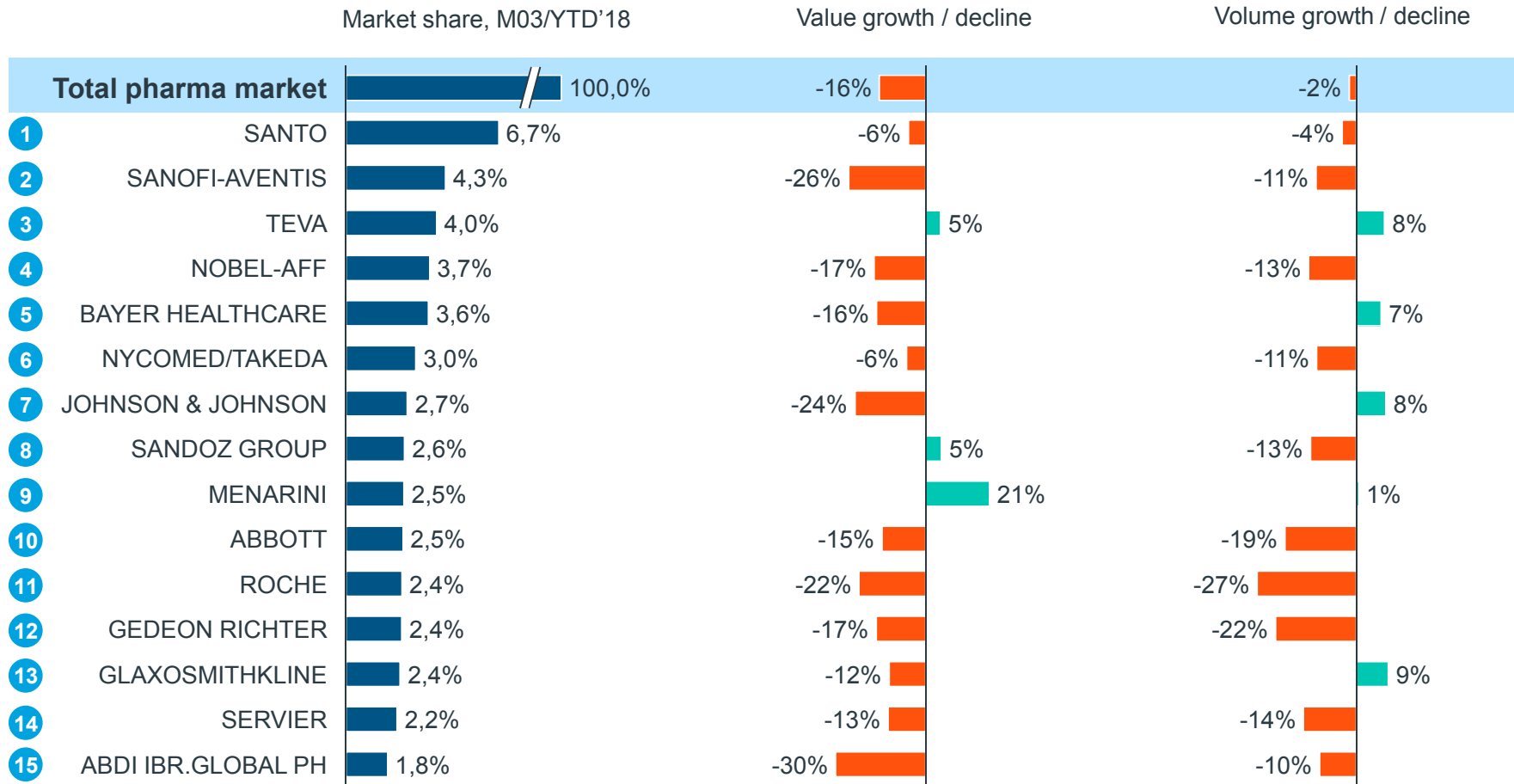


Indicator	KZT	USD	EUR	PACKS
Value M03/YTD 2018, Bln.	94	0,29	0,24	0,15
Growth M03/YTD,%	▼ -16%	▼ -16%	▼ -27%	▼ -2,0%

Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices



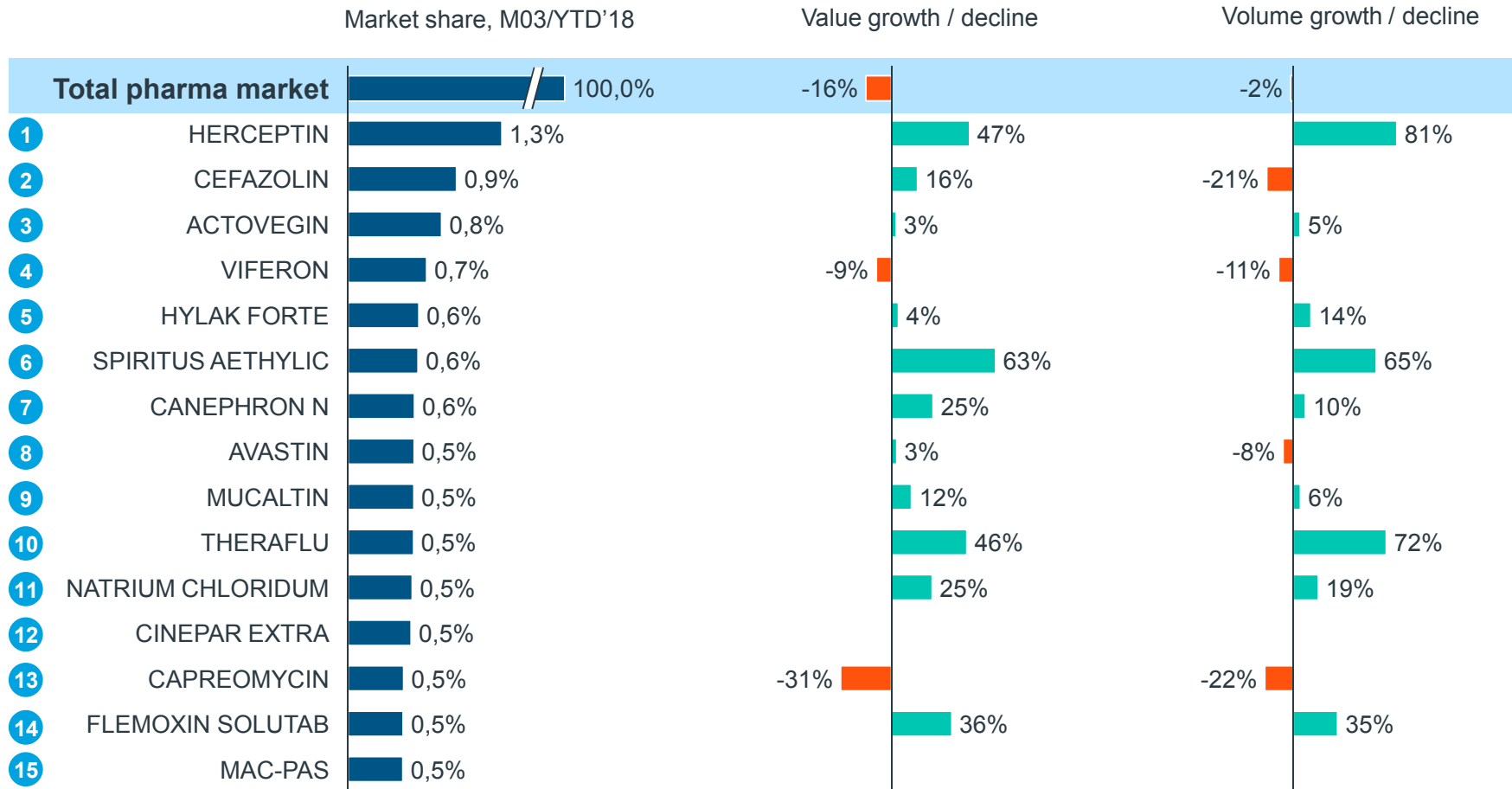
TOP-15 corporations on Kazakhstan market, January-March 2018



Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices



TOP-15 brands on Kazakhstan market, January-March 2018

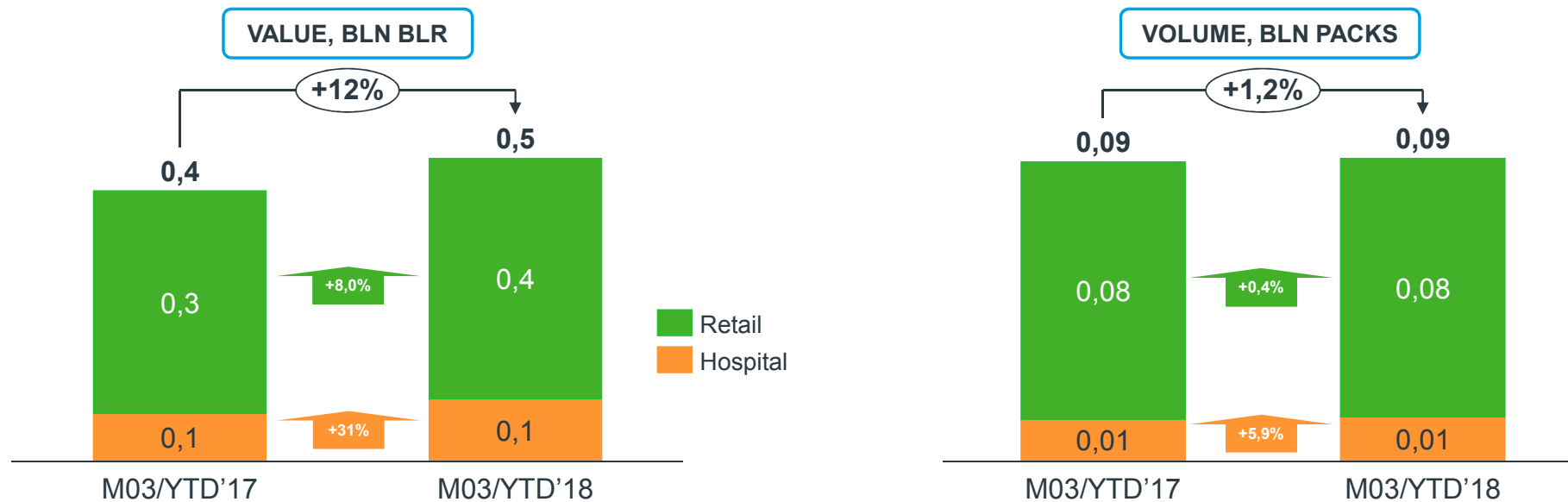


Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices



Belarus pharma market growth in January-March 2018

Market grows by +12% in value and +1,2% in volume

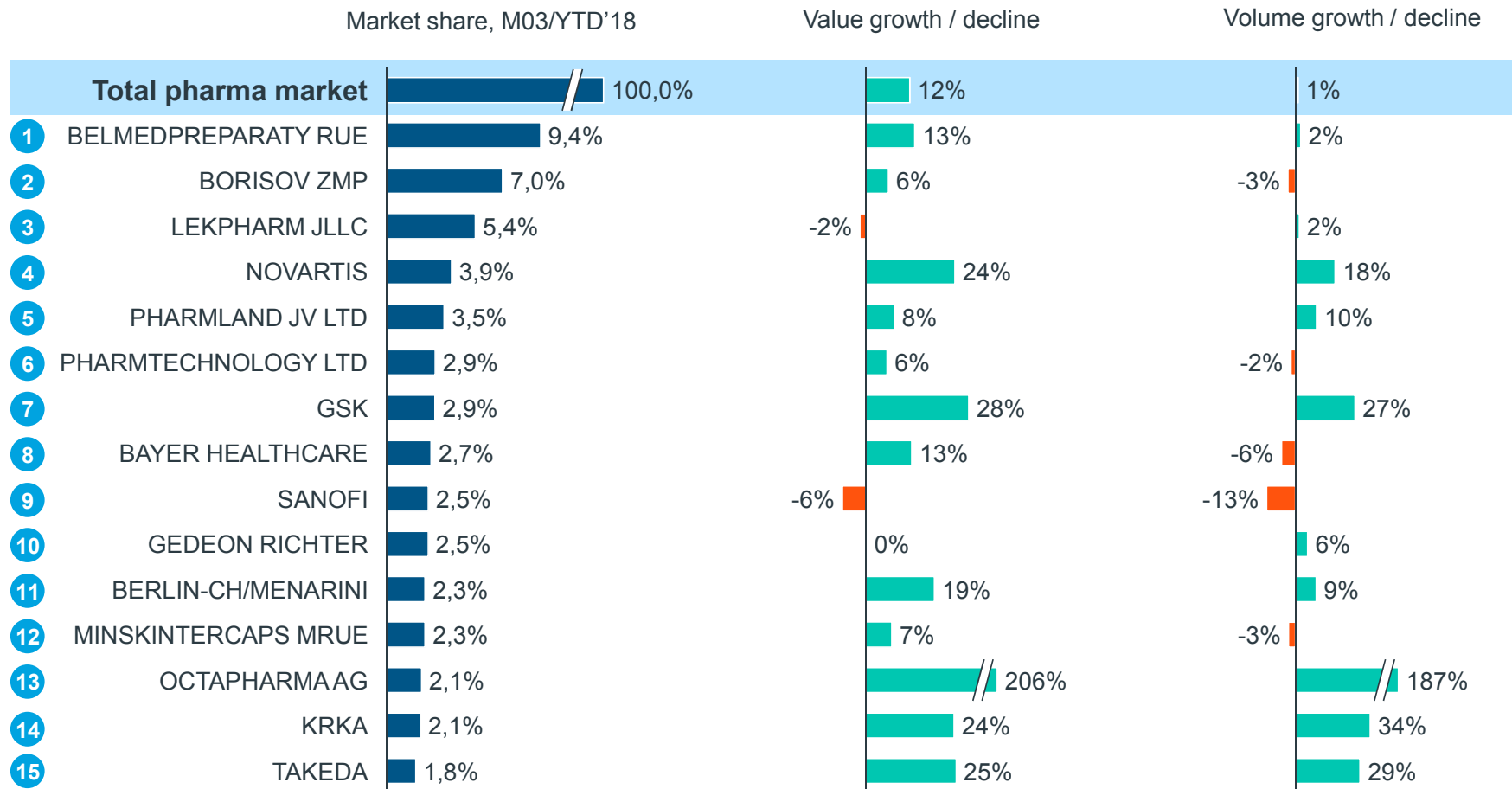


Indicator	BLR	USD	EUR	PACKS
Value M03/YTD 2018, Bln.	0,5	0,24	0,20	0,09
Growth M03/YTD,%	▲ +12%	▲ +9%	▼ -5,8%	▲ +1,2%

Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices



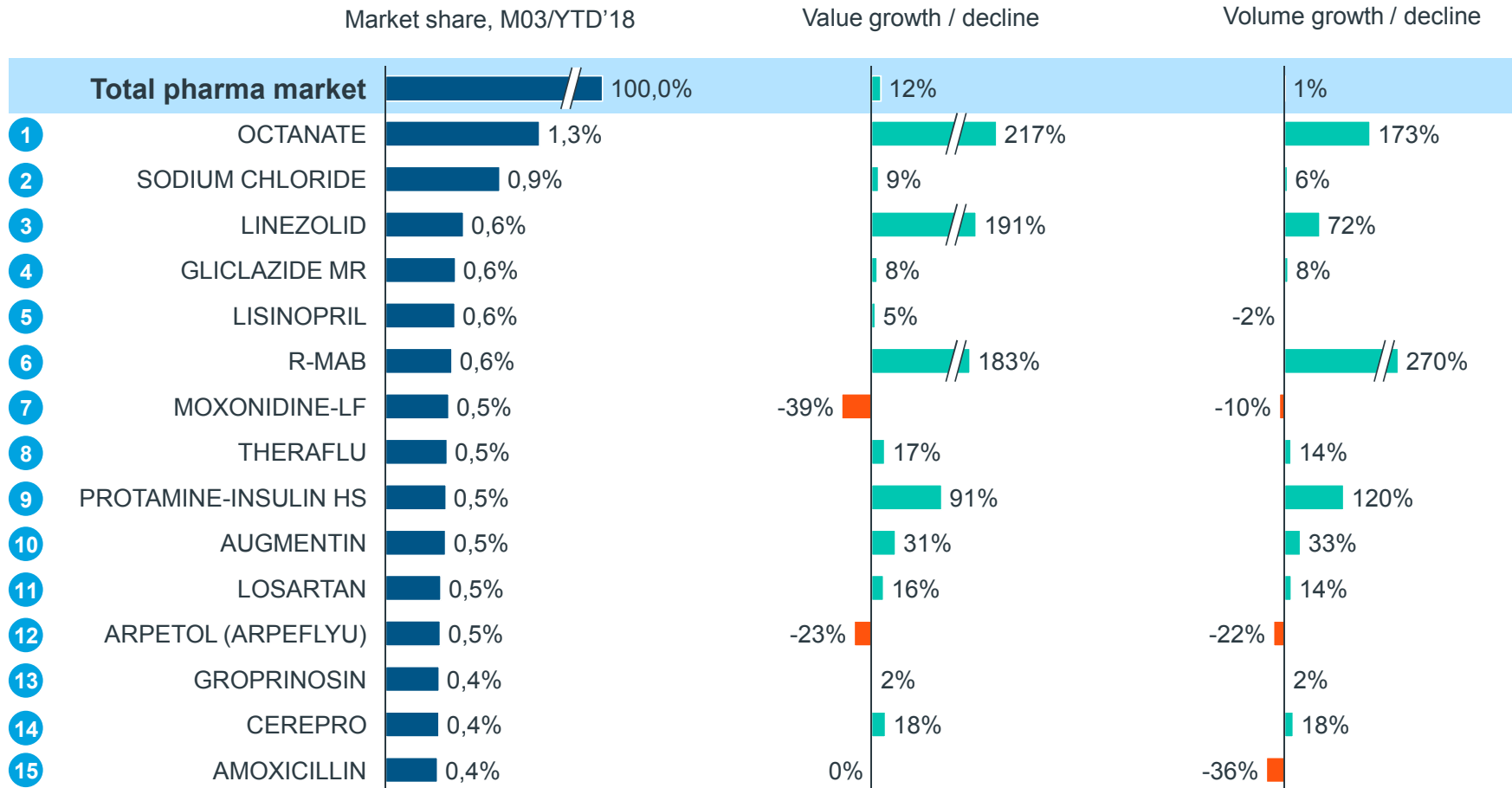
TOP-15 corporations on Belarus market, January-March 2018



Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices



TOP-15 brands on Belarus market, January-March 2018

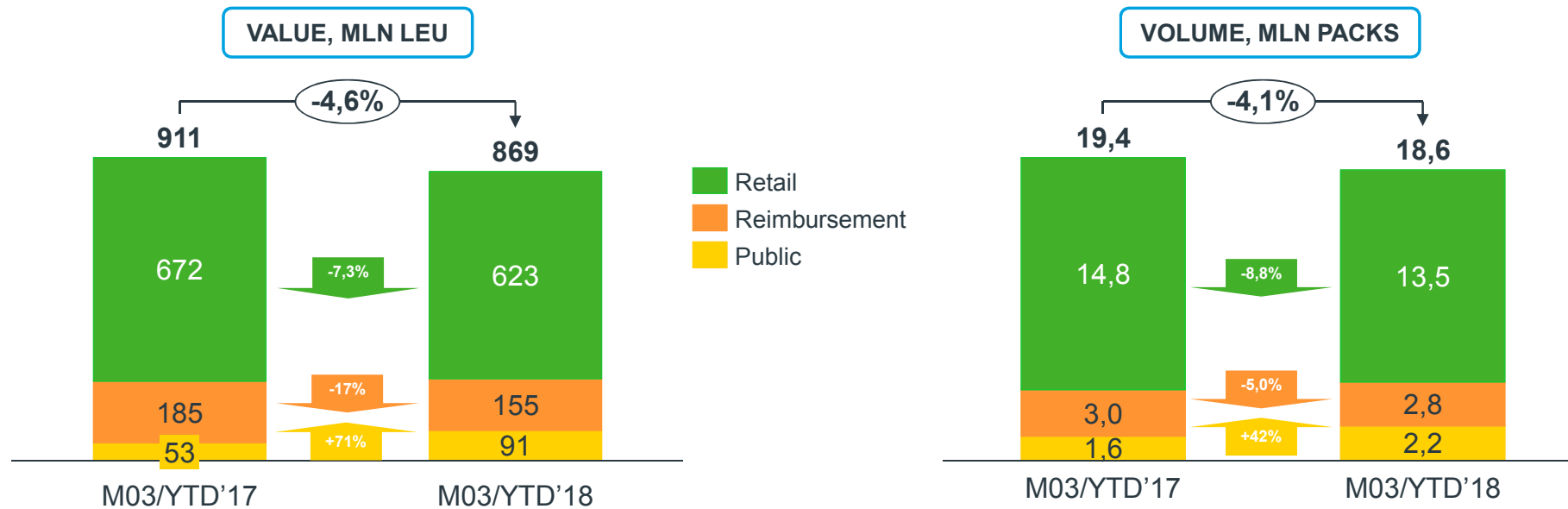


Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices



Moldova pharma market growth in January-March 2018

Market decreases by -4,6% in value and -4,1% in volume

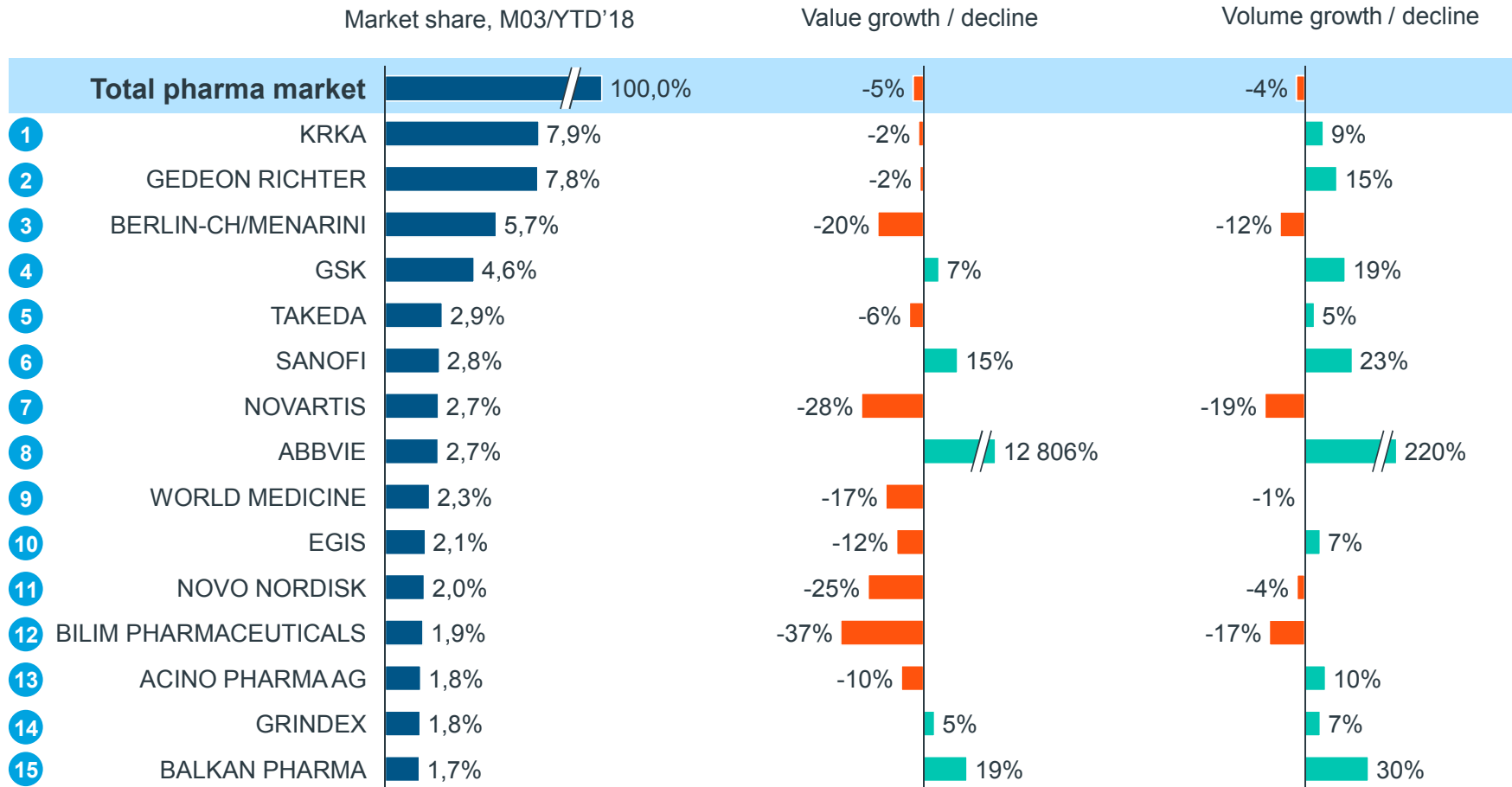


Indicator	LEU	USD	EUR	PACKS
Value M03/YTD 2018, Mln.	869	51,9	42,2	18,6
Growth M03/YTD,%	▼ -4,6%	▲ 14%	▼ -1,7%	▼ -4,1%

Source: IQVIA databases. Retail, Hospital, Reimbursement (excluding food supplements and diagnostic agents), TRD Prices



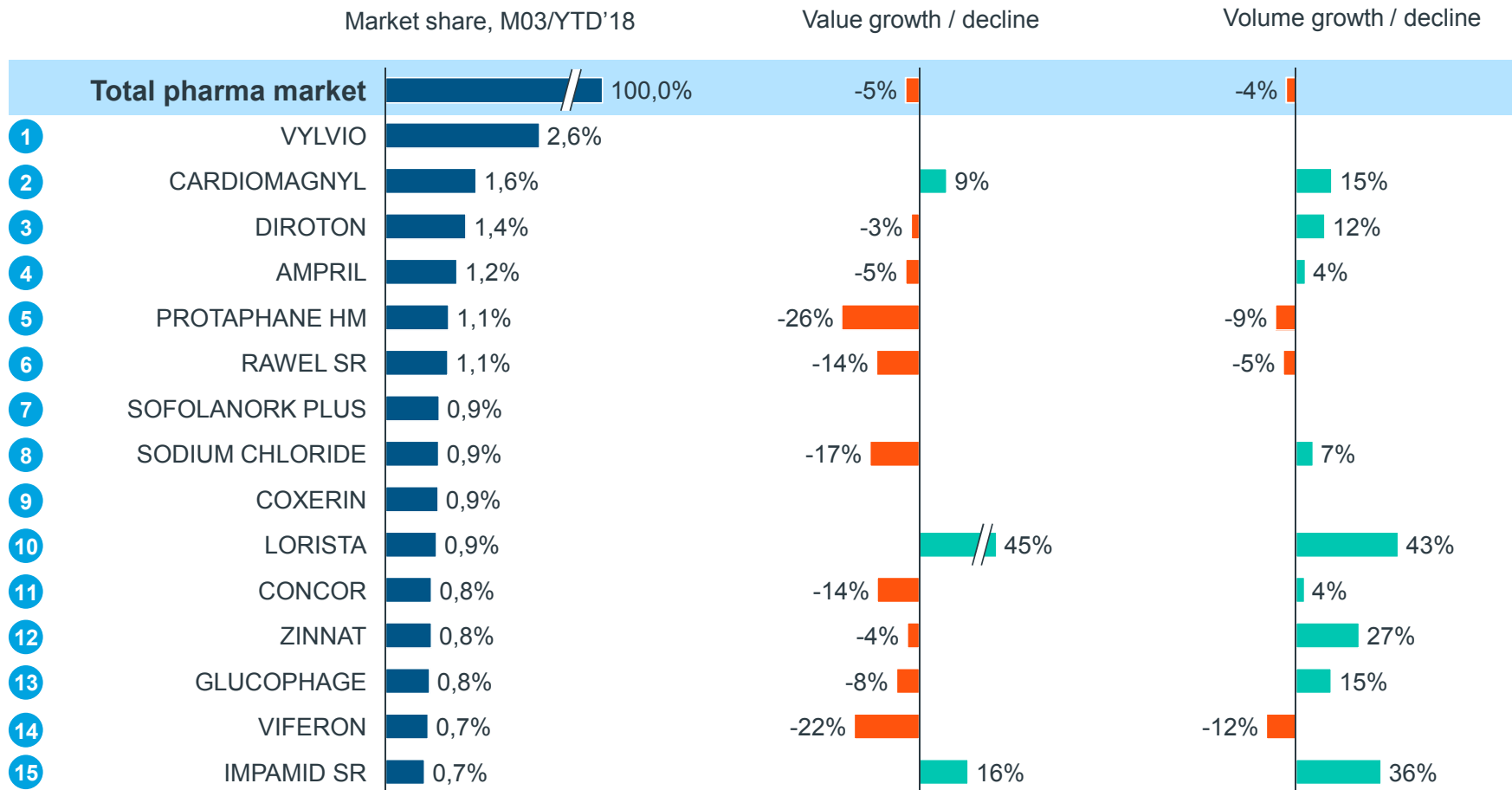
TOP-15 corporations on Moldova market, January-March 2018



Source: IQVIA databases. Retail, Hospital, Reimbursement (excluding food supplements and diagnostic agents), TRD Prices



TOP-15 brands on Moldova market, January-March 2018



Source: IQVIA databases. Retail, Hospital, Reimbursement (excluding food supplements and diagnostic agents), TRD Prices

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