



IMS Health & Quintiles are now



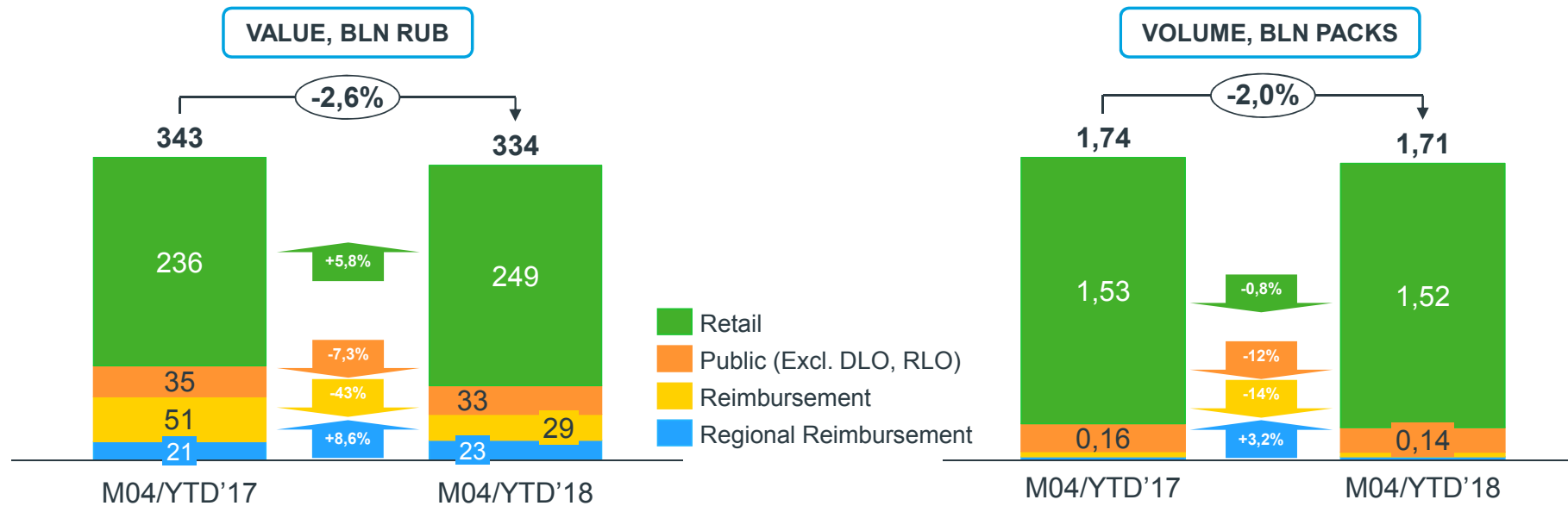
Facts from IQVIA

M04 2018



Russia pharma market growth in January-April 2018

Market decreases by -2,6% in value and -2,0% in volume



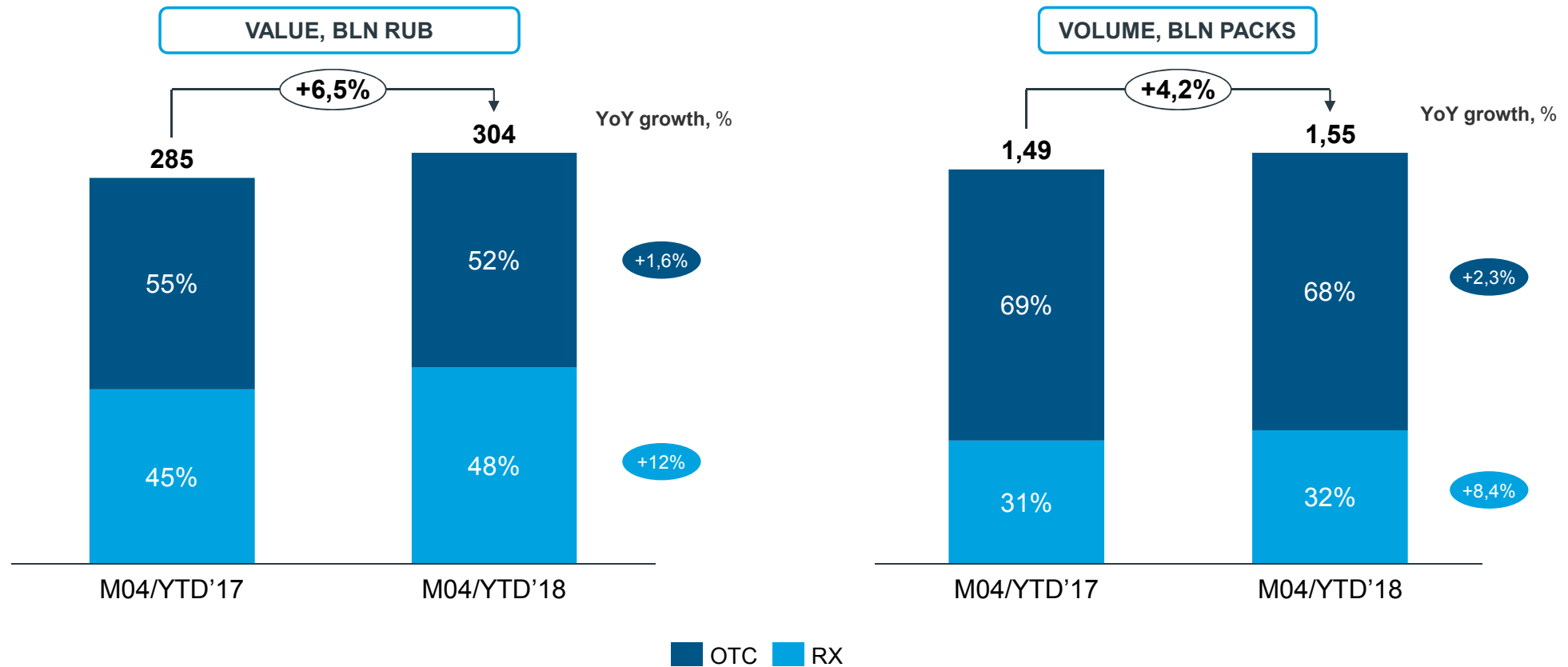
Indicator	RUB	USD	EUR	PACKS
Value M04/YTD 2018, Bln.	334	5,8	4,7	1,7
Growth M04/YTD,%	▼ -2,6%	▼ -2,0%	▼ -15%	▼ -2,0%

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



Russia pharma market growth in January-April 2018

Retail Sell-Out: Market grew by 6,5% in value and 4,2% in volume



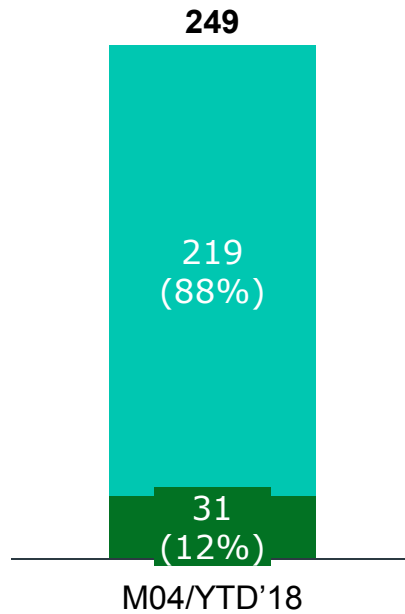
Source: Pharmatrend (excluding food supplements and diagnostic agents), FIN Prices



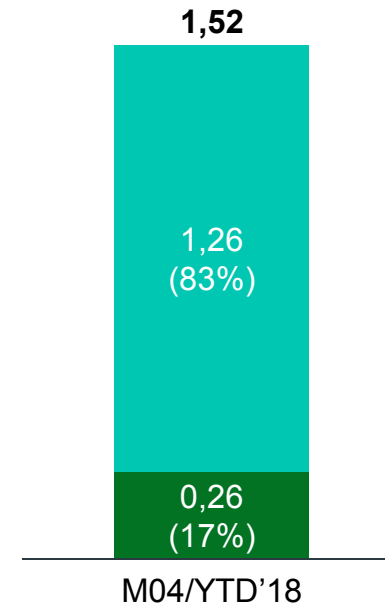
Russia retail market structure in January-April 2018

Retail Sell-In: Share of Pharmacy chains is 88% in value and 83% in volume

VALUE, BLN RUB



VOLUME, BLN PACKS



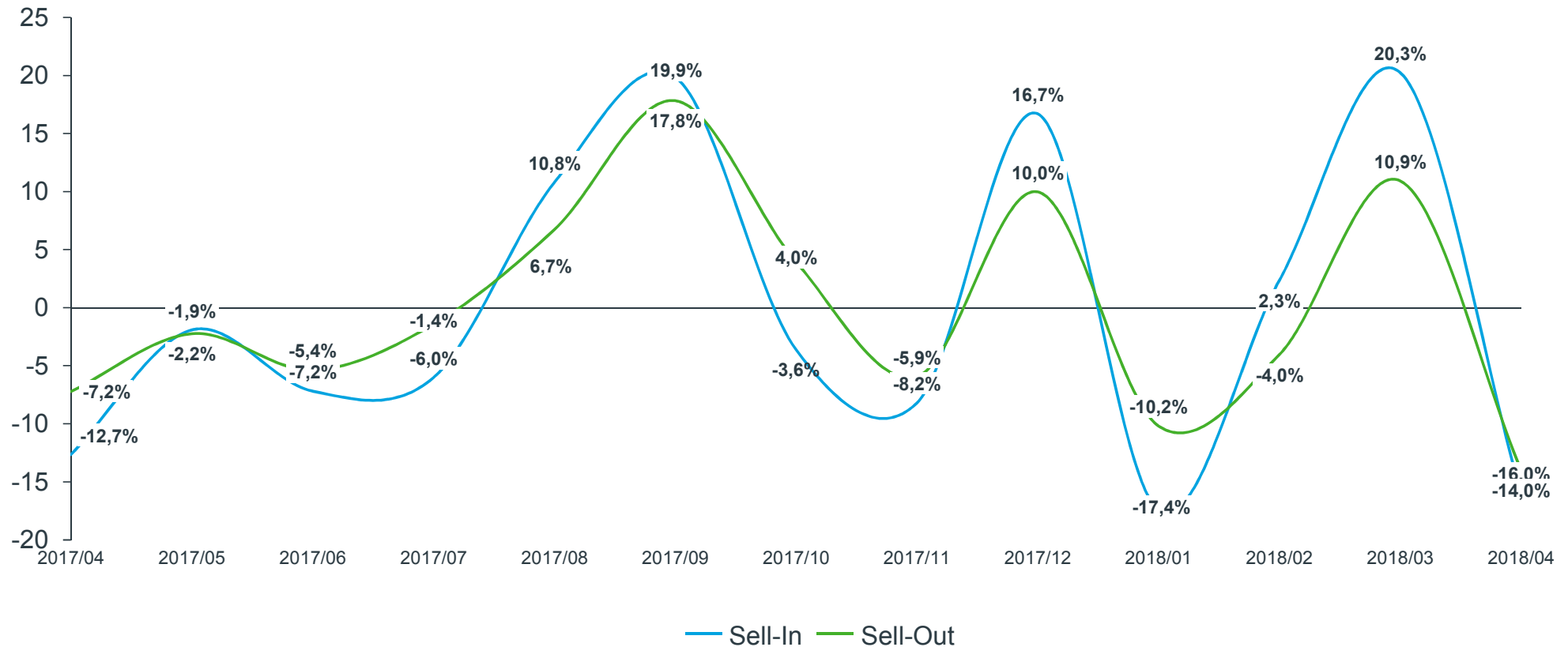
■ Pharmacy Chains
■ Individual pharmacies

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



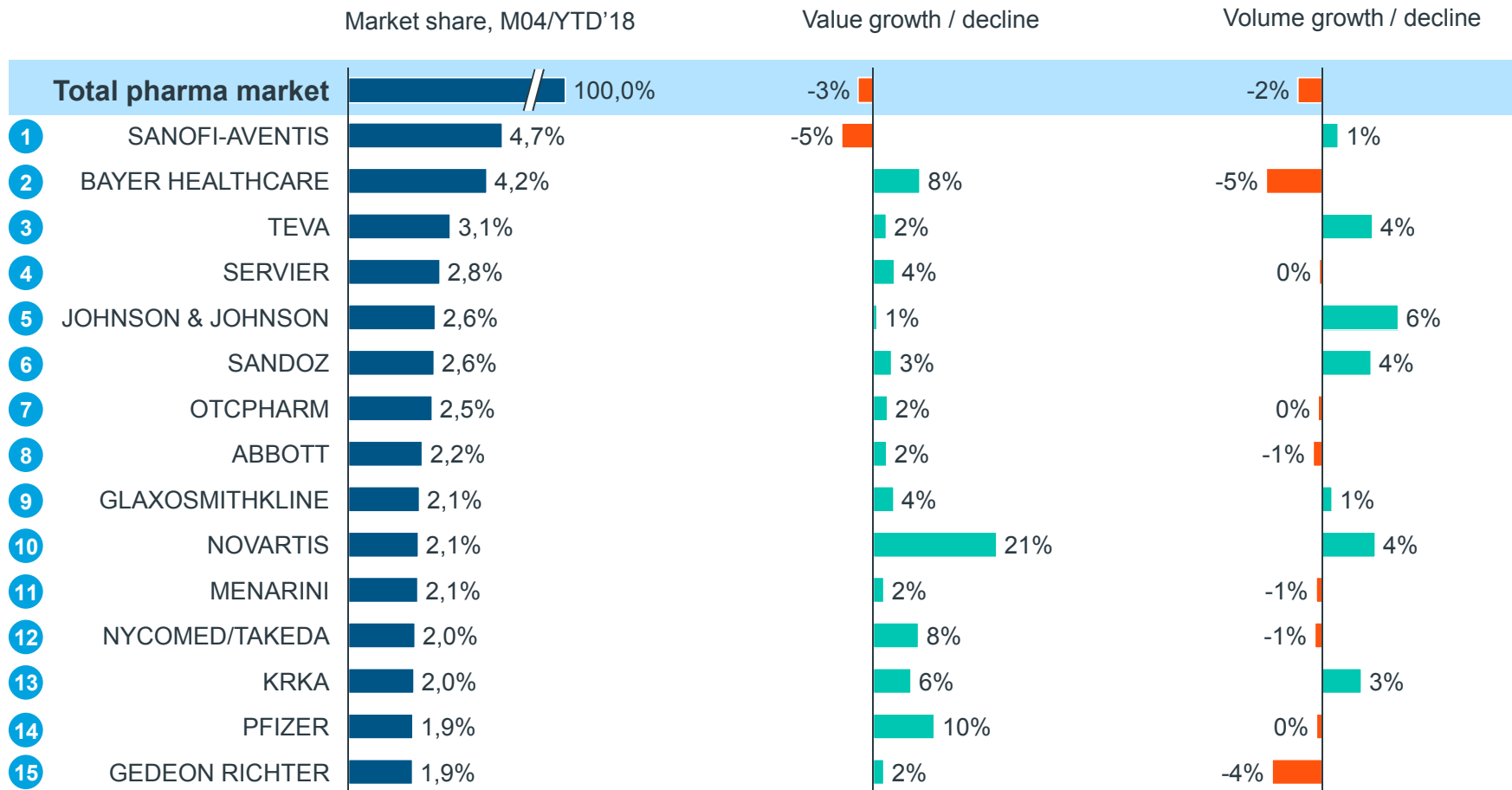
Sell-In vs Sell-Out, OTC registered drugs

Month-Over-Month Growth Rates, volume





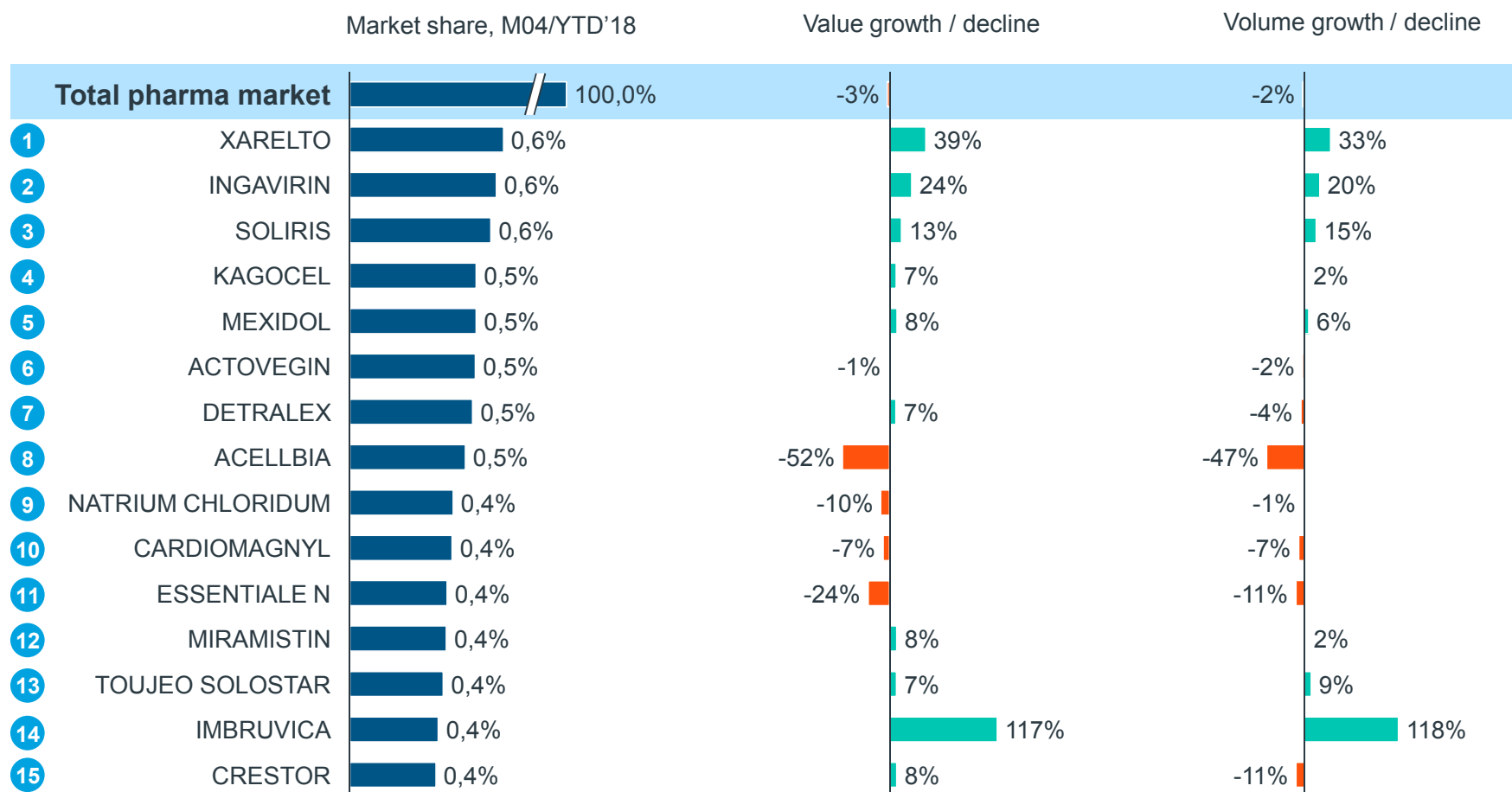
TOP-15 corporations on Russian market, January-April 2018



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

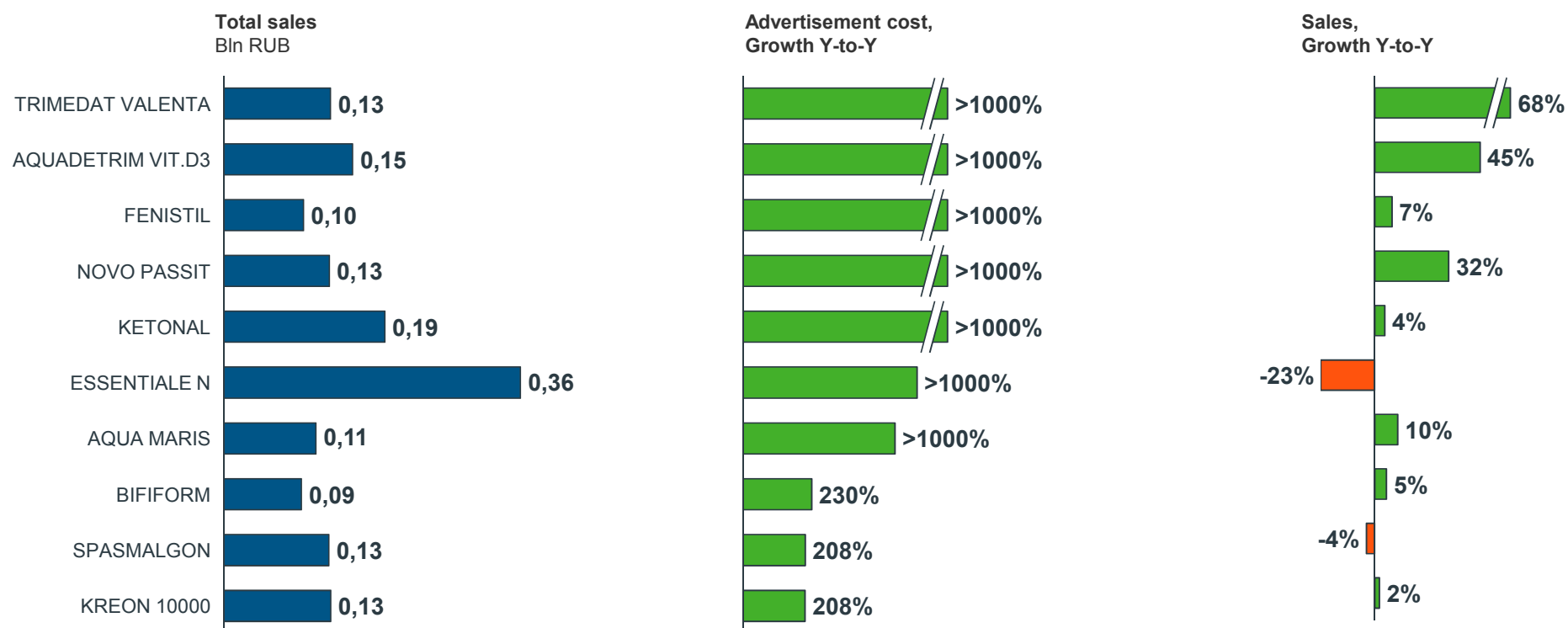


TOP-15 brands on Russian market, January-April 2018



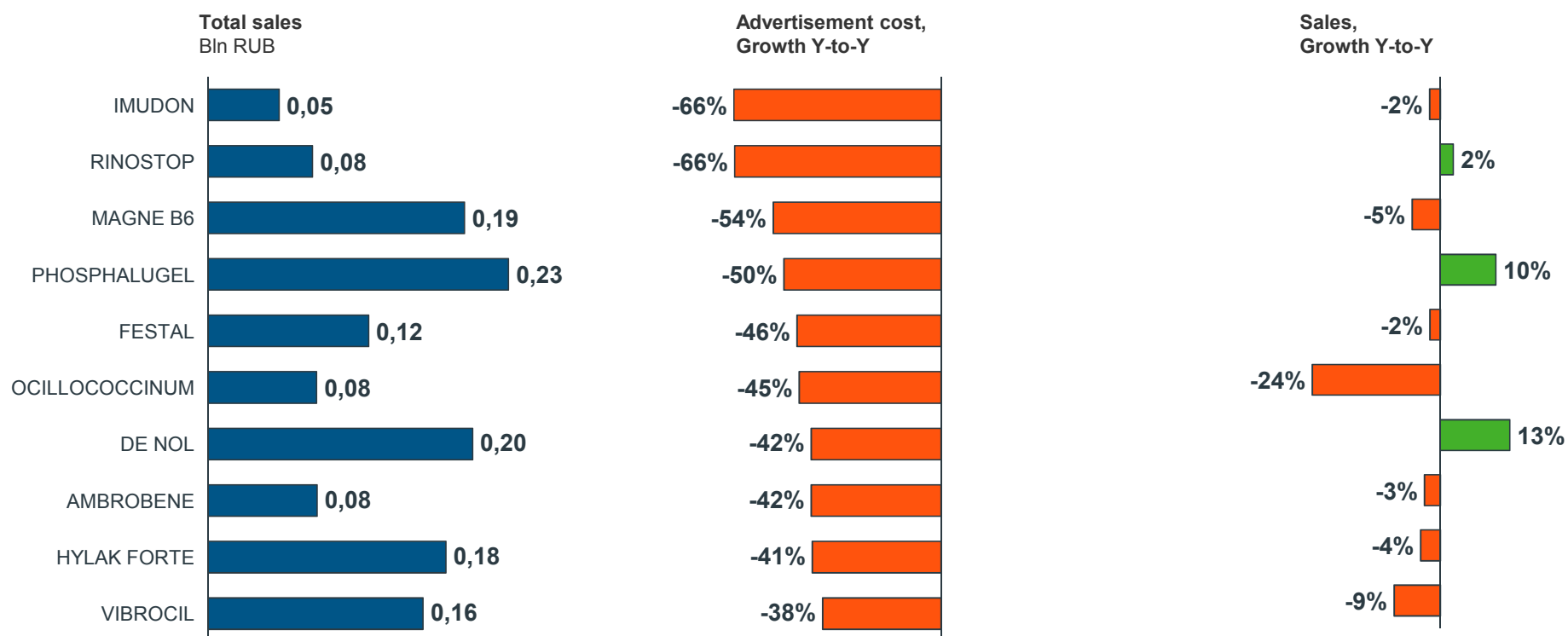
Source: IQVIA databases. Retail, Public, DLO, RLO (excluding food supplements and diagnostic agents), TRD Prices

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

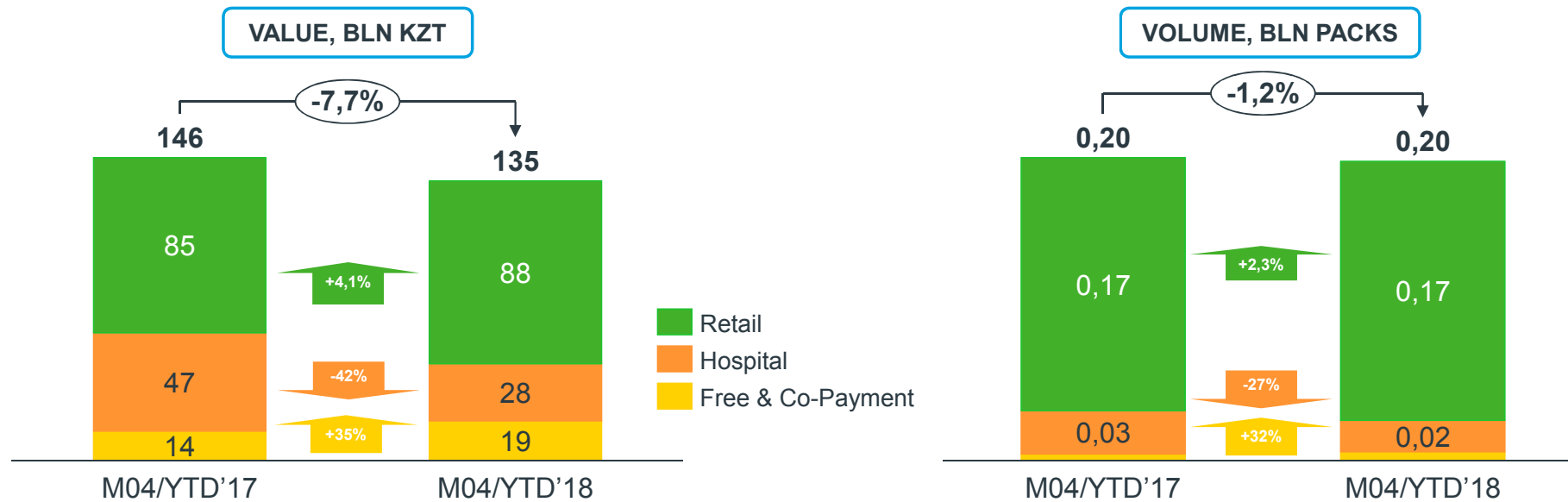


The rank is calculated among TOP-200 Products by sales with advertising cost greater than 50 mln RUB
 Source: IQVIA databases, Phmatrend, Mediascope data, FIN Prices



Kazakhstan pharma market growth in January-April 2018

Market decreases by -7,7% in value and -1,2% in volume

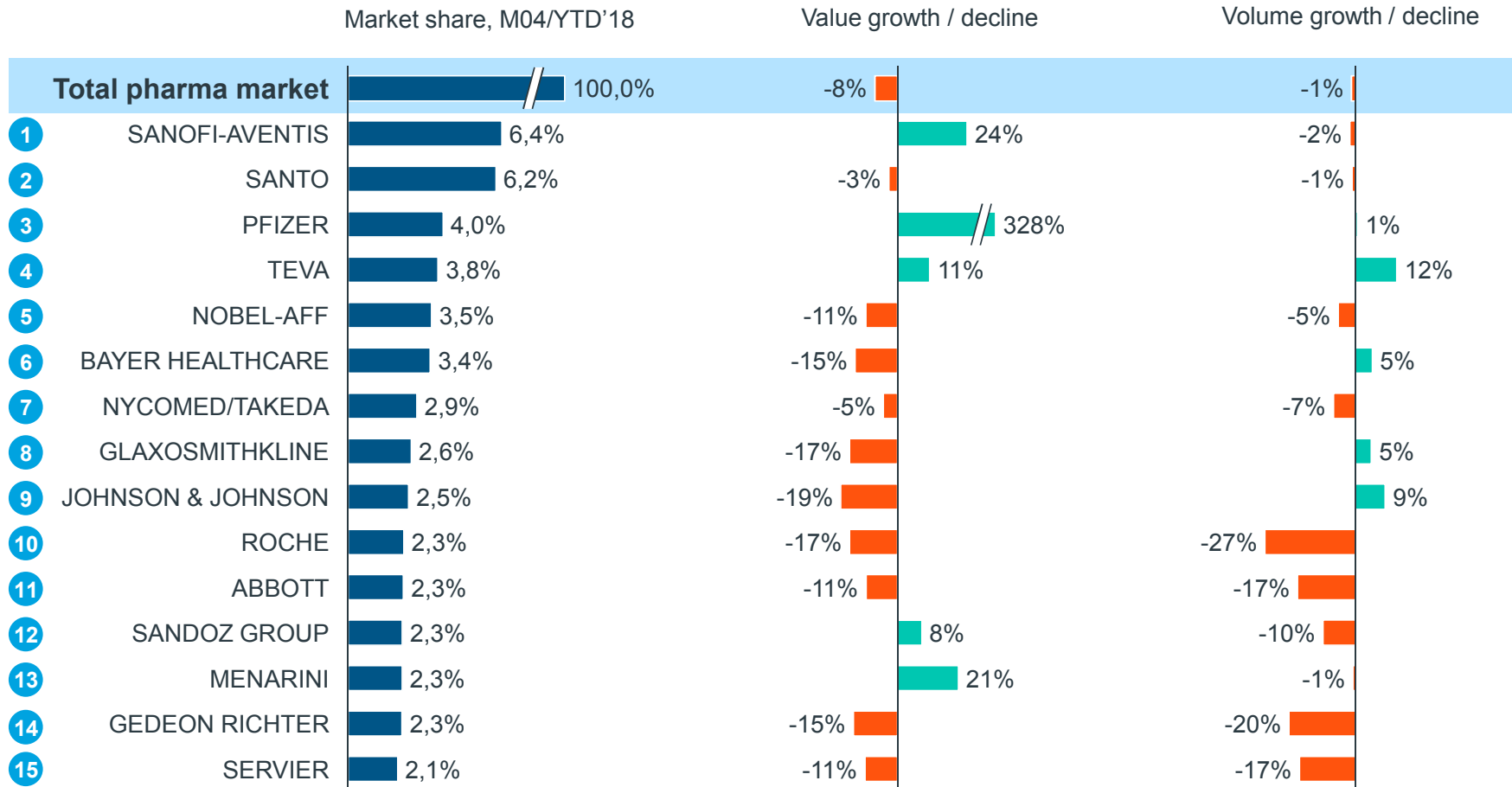


Indicator	KZT	USD	EUR	PACKS
Value M04/YTD 2018, Bln.	135	0,4	0,3	0,2
Growth M04/YTD,%	▼ -7,7%	▼ -9,0%	▼ -21%	▼ -1,2%

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



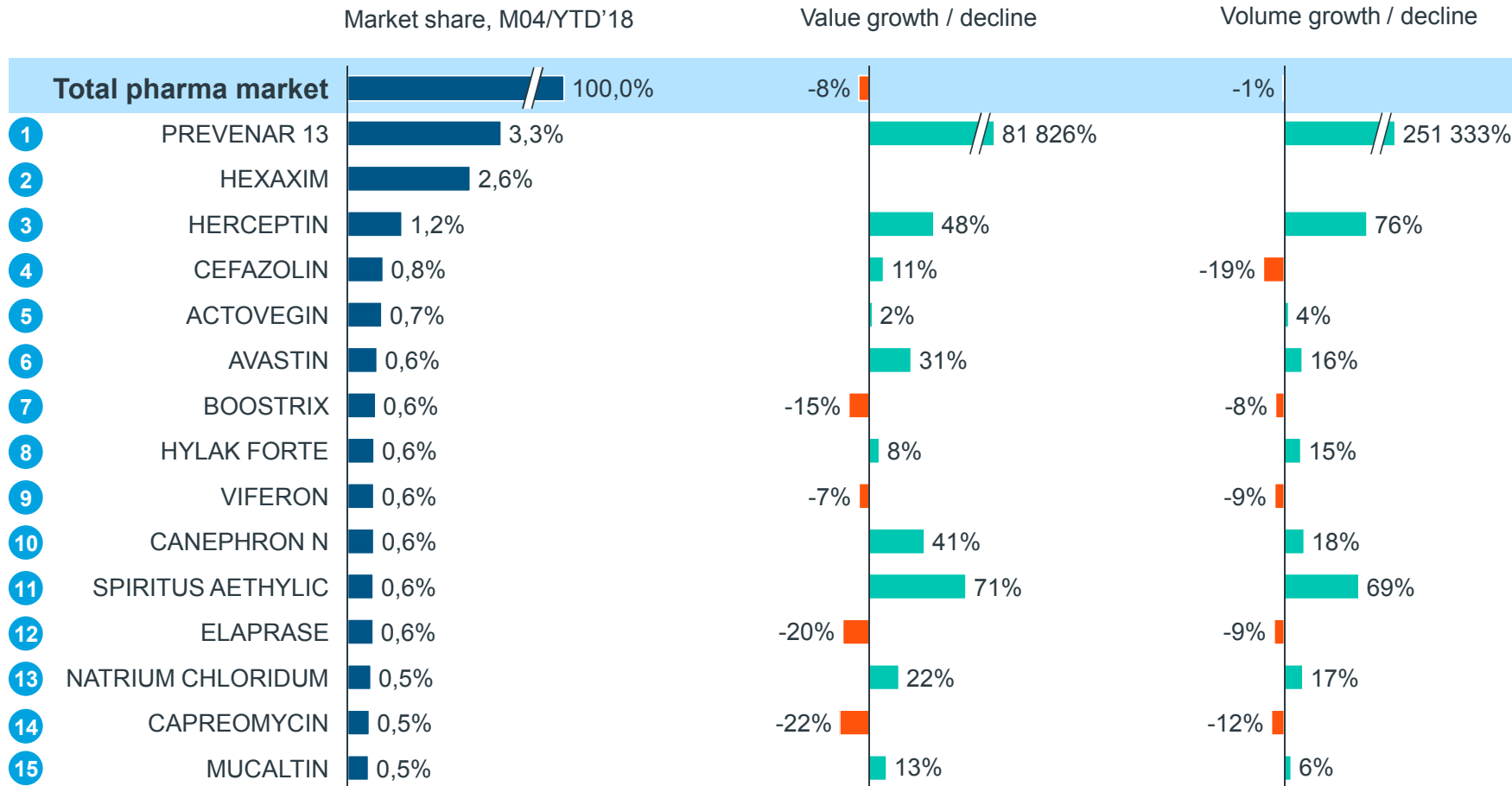
TOP-15 corporations on Kazakhstan market, January-April 2018



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



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

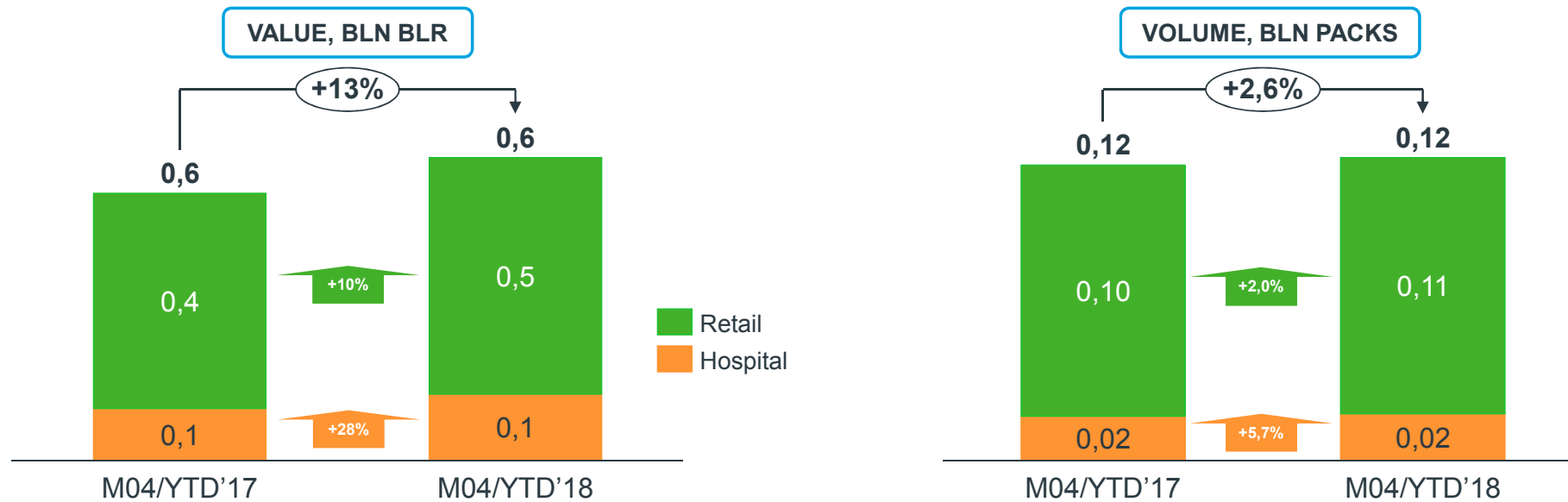


Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices



Belarus pharma market growth in January-April 2018

Market grows by +13% in value and +2,6% in volume

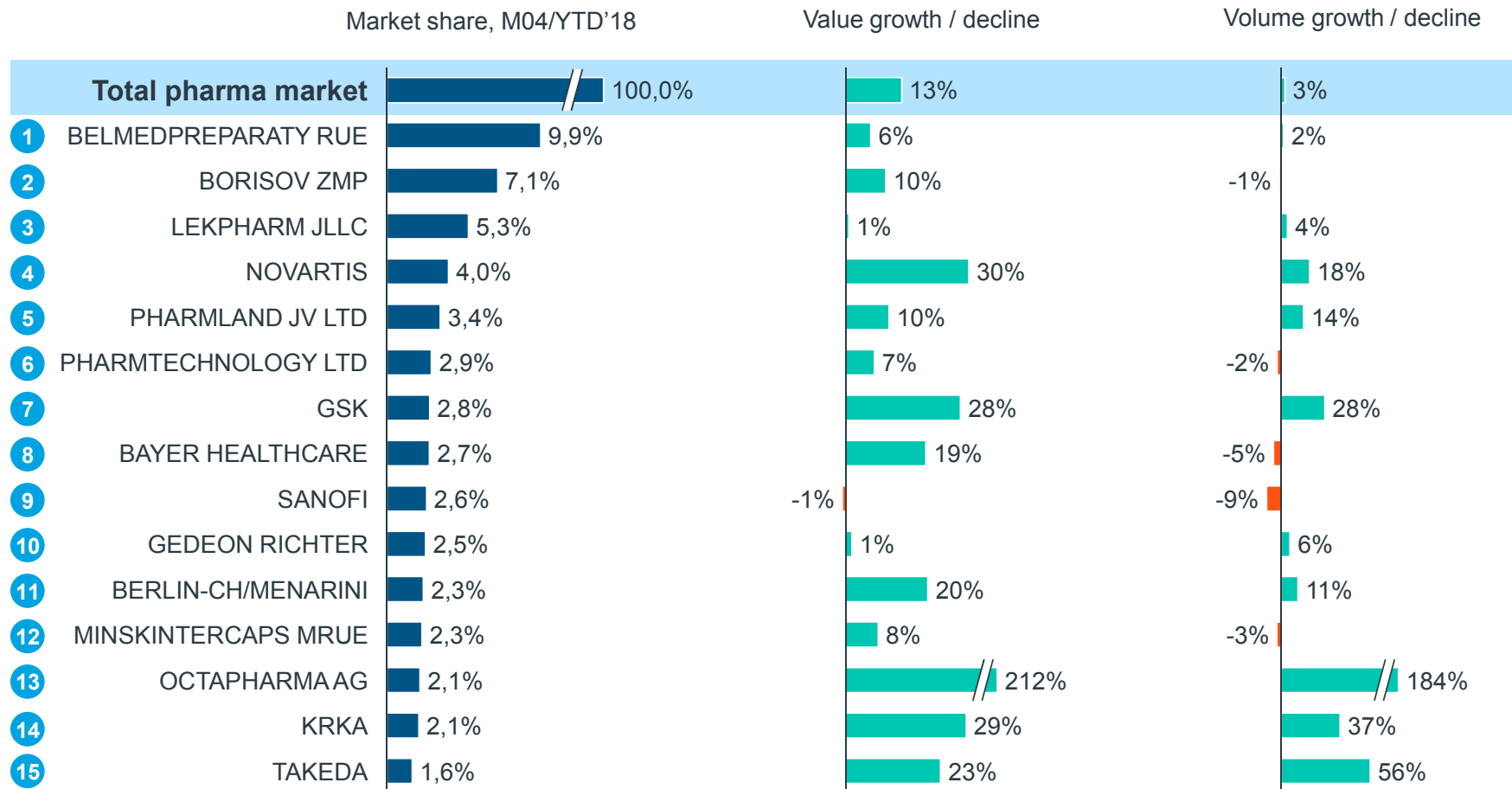


Indicator	BLR	USD	EUR	PACKS
Value M04/YTD 2018, Bln.	0,6	0,3	0,3	0,1
Growth M04/YTD,%	▲ 13%	▲ 9,2%	▼ -5,3%	▲ 2,6%

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



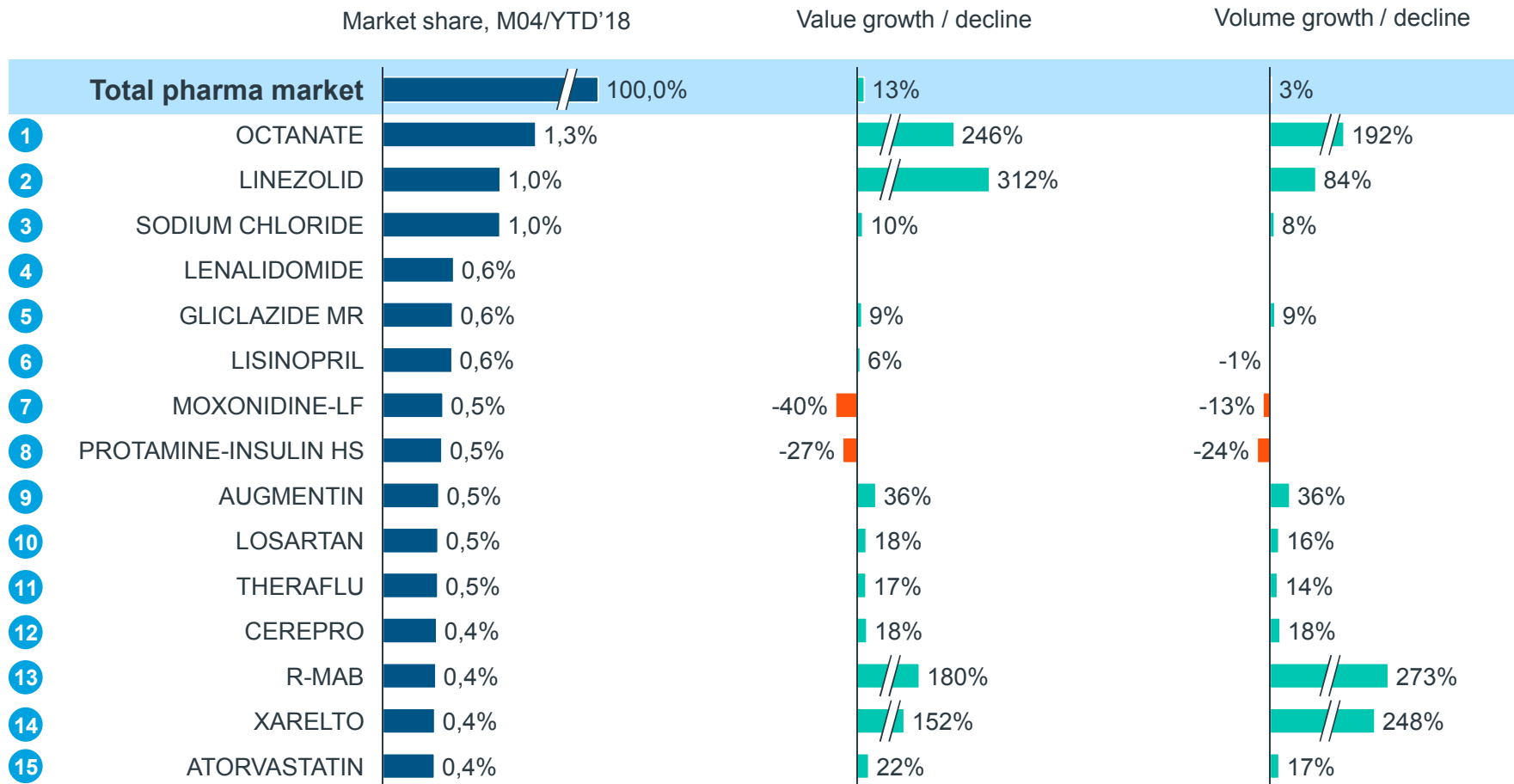
TOP-15 corporations on Belarus market, January-April 2018



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



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

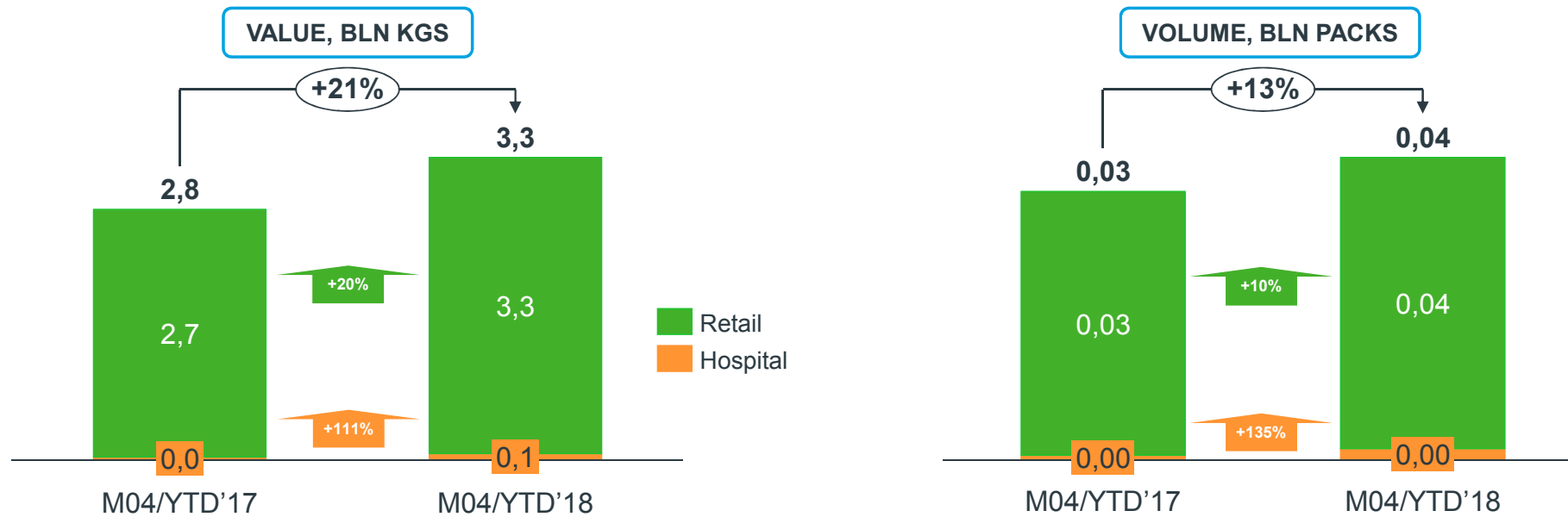


Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices



Kyrgyzstan pharma market growth in January-April 2018

Market grows by +21% in value and +13% in volume

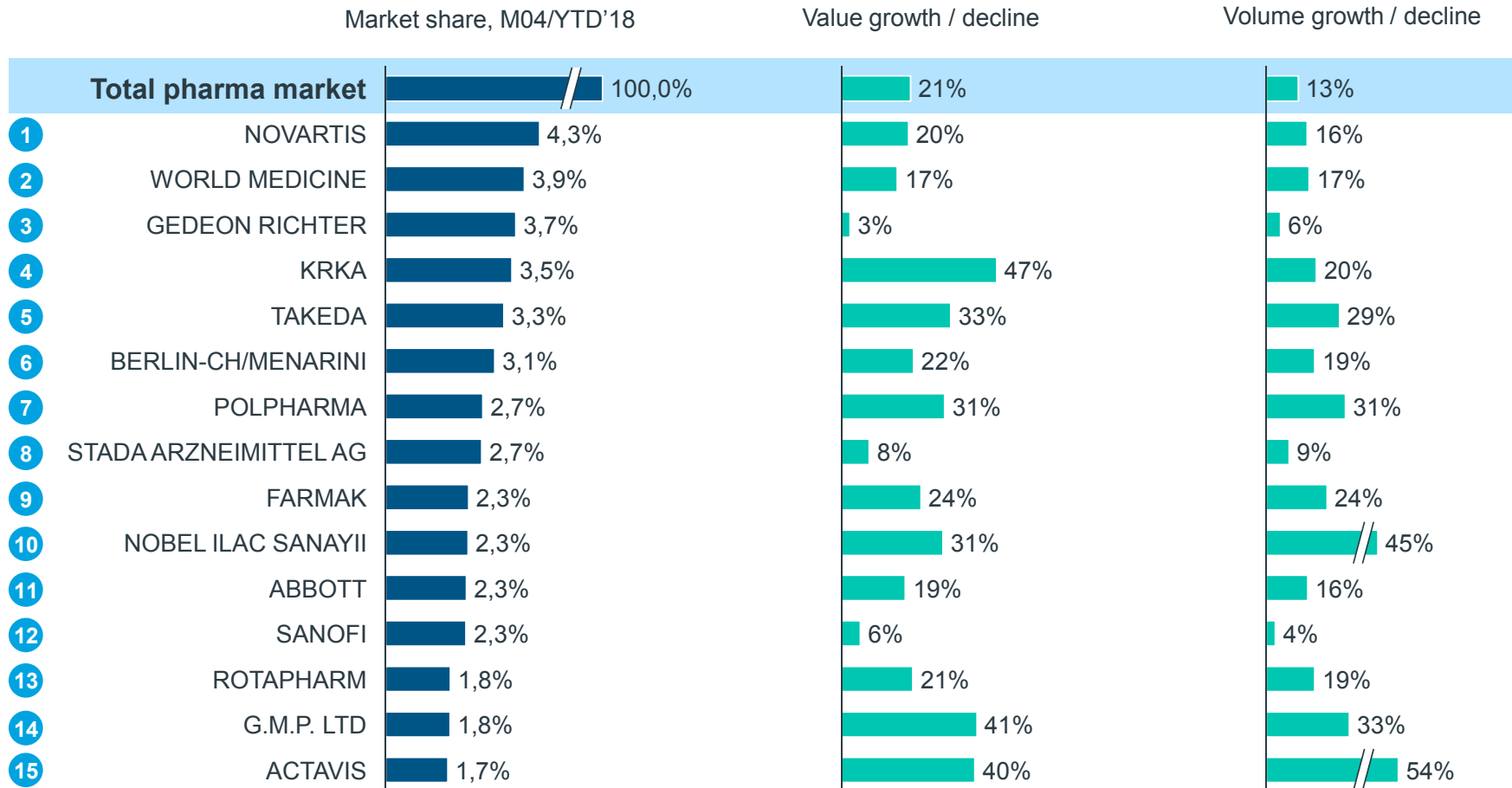


Indicator	KGS	USD	EUR	PACKS
Value M04/YTD 2018, Bln.	3,3	0,05	0,04	0,04
Growth M04/YTD,%	▲ 21%	▲ 21%	▲ 5,6%	▲ 13%

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



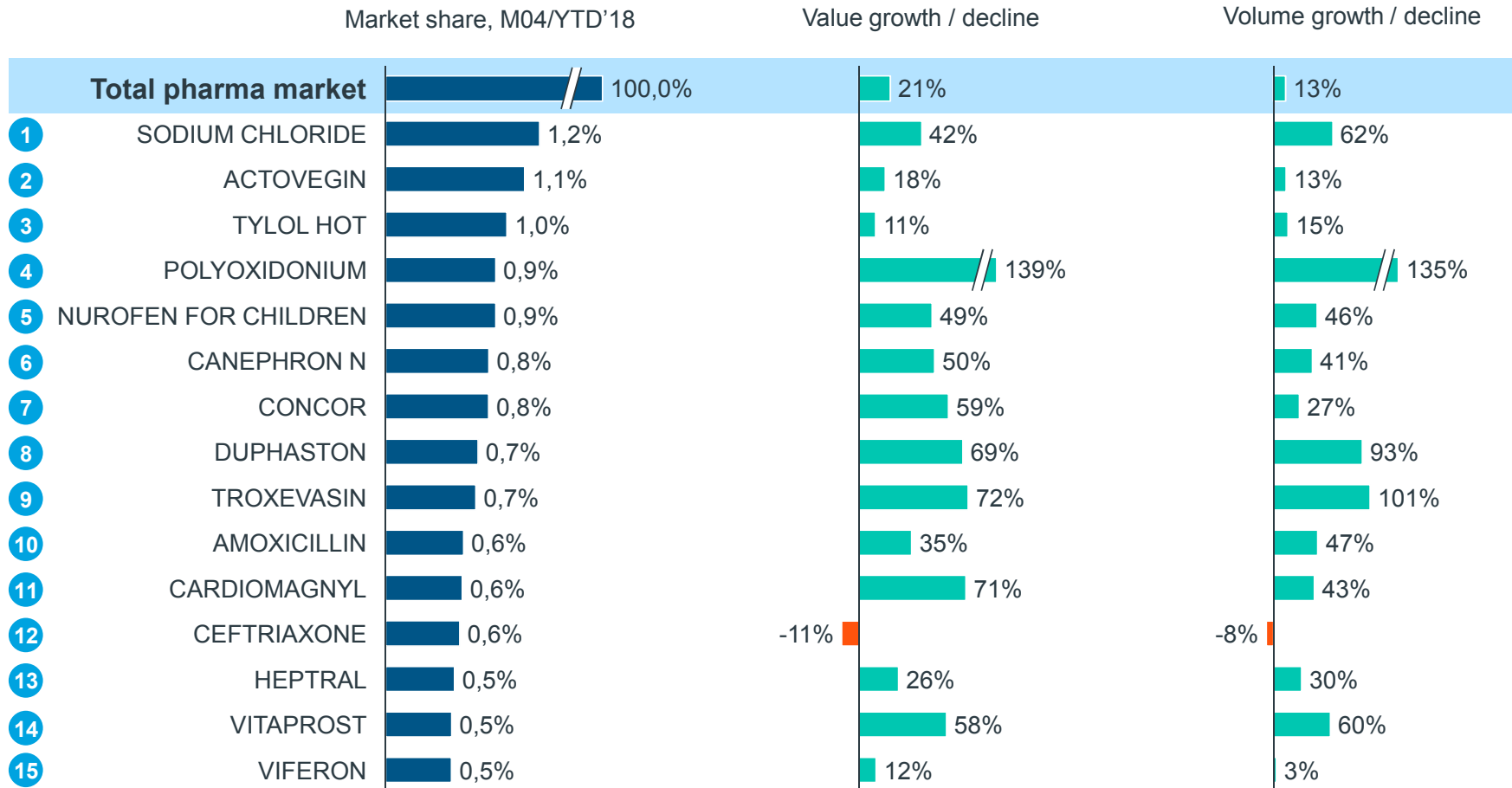
TOP-15 corporations on Kyrgyzstan market, January-April 2018



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



TOP-15 brands on Kyrgyzstan market, January-April 2018



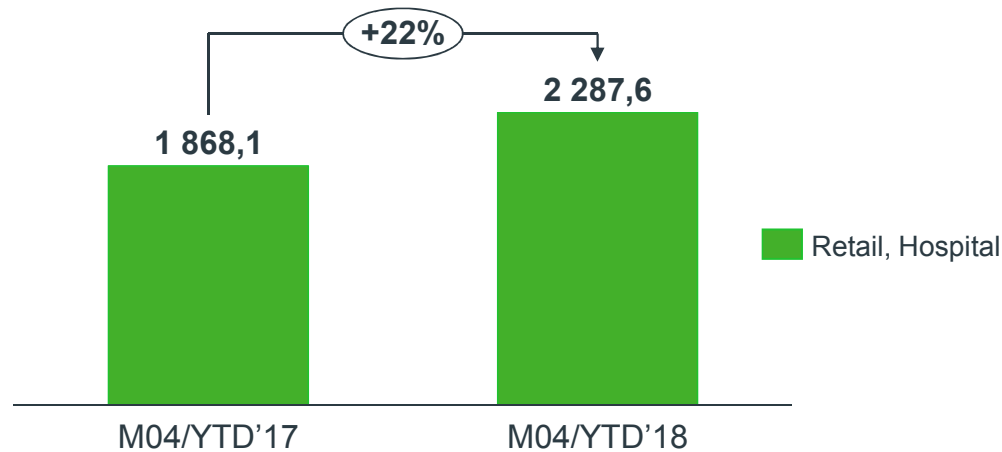
Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices



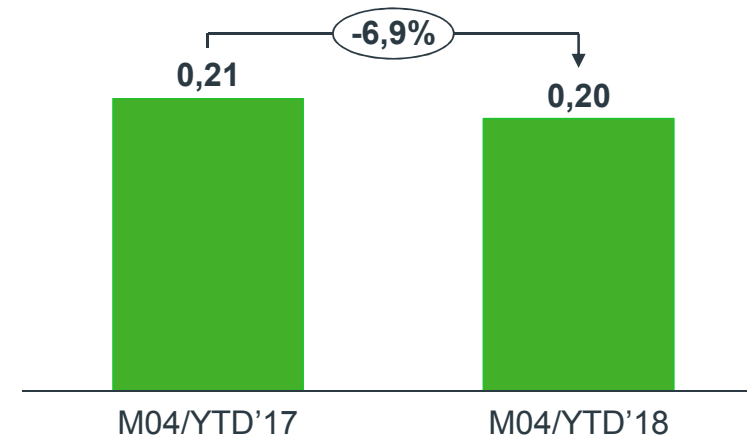
Uzbekistan pharma market growth in January-April 2018

Market grows by +22% in value and +6,9% in volume

VALUE, BLN UZS



VOLUME, BLN PACKS

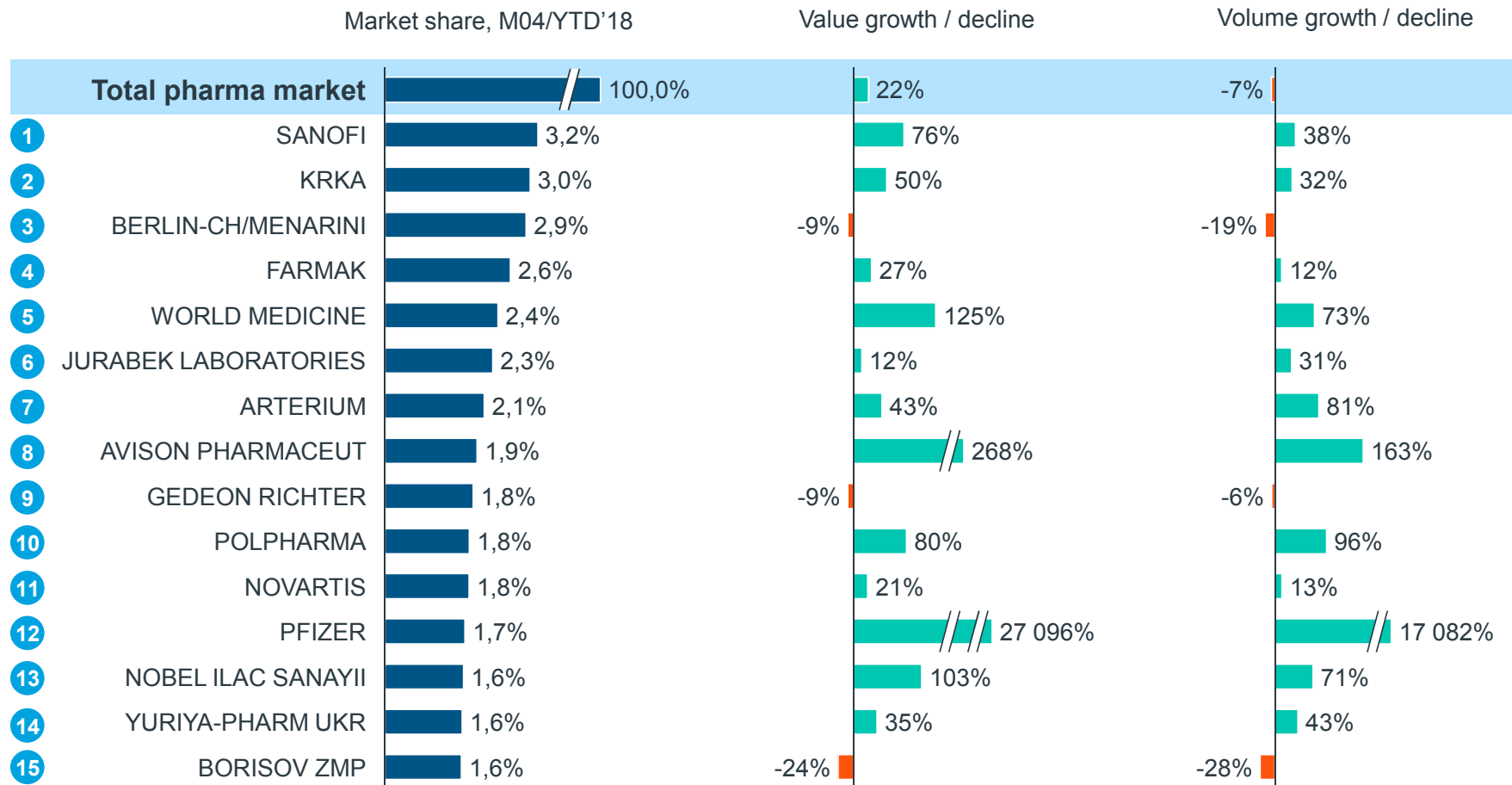


Indicator	UZS	USD	EUR	PACKS
Value M04/YTD 2018, Bln.	2 288	0,3	0,2	0,2
Growth M04/YTD,%	▲ 22%	▼ -50%	▼ -56%	▼ -6,9%

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



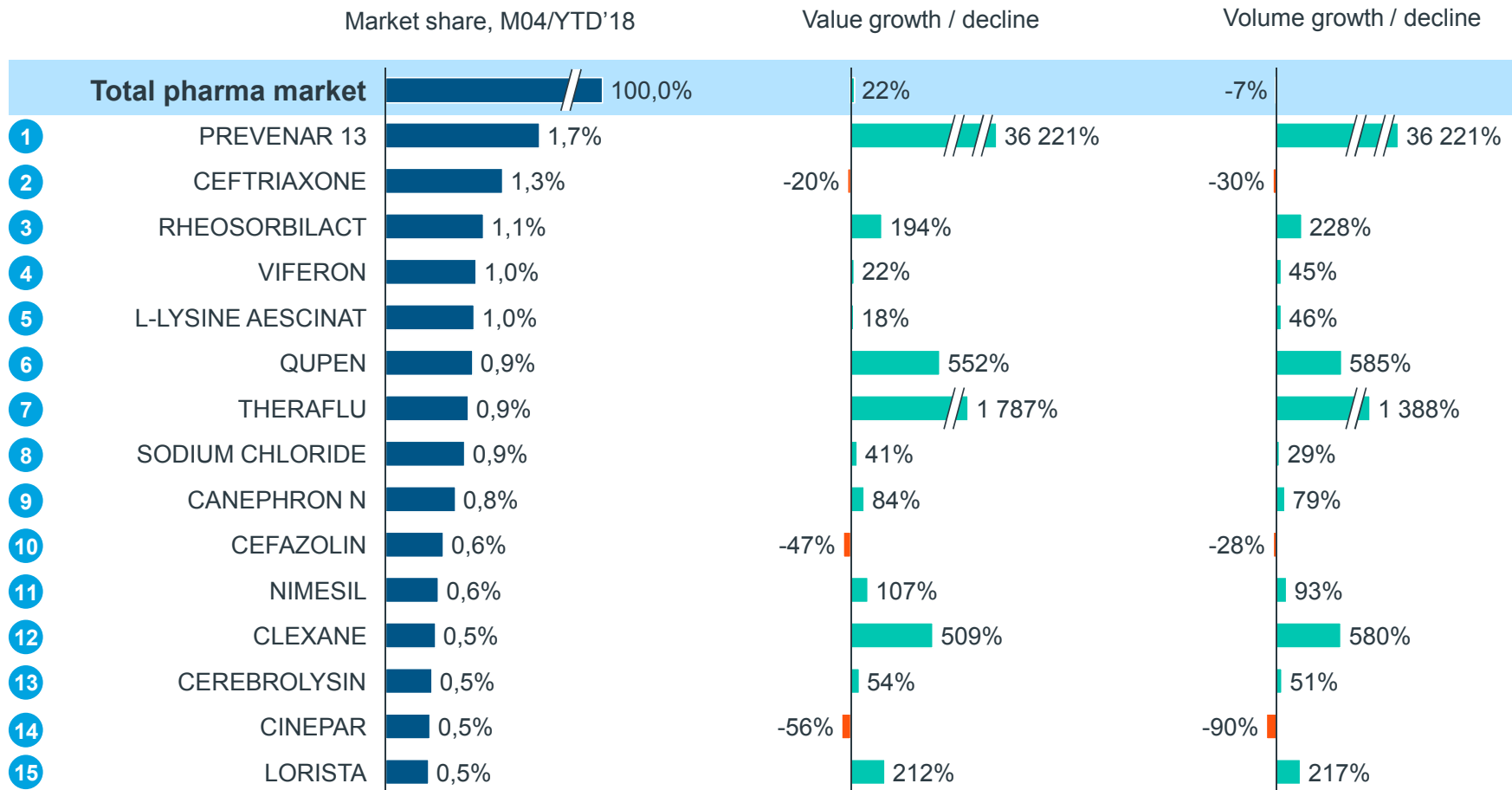
TOP-15 corporations on Uzbekistan market, January-April 2018



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



TOP-15 brands on Uzbekistan market, January-April 2018



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

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