

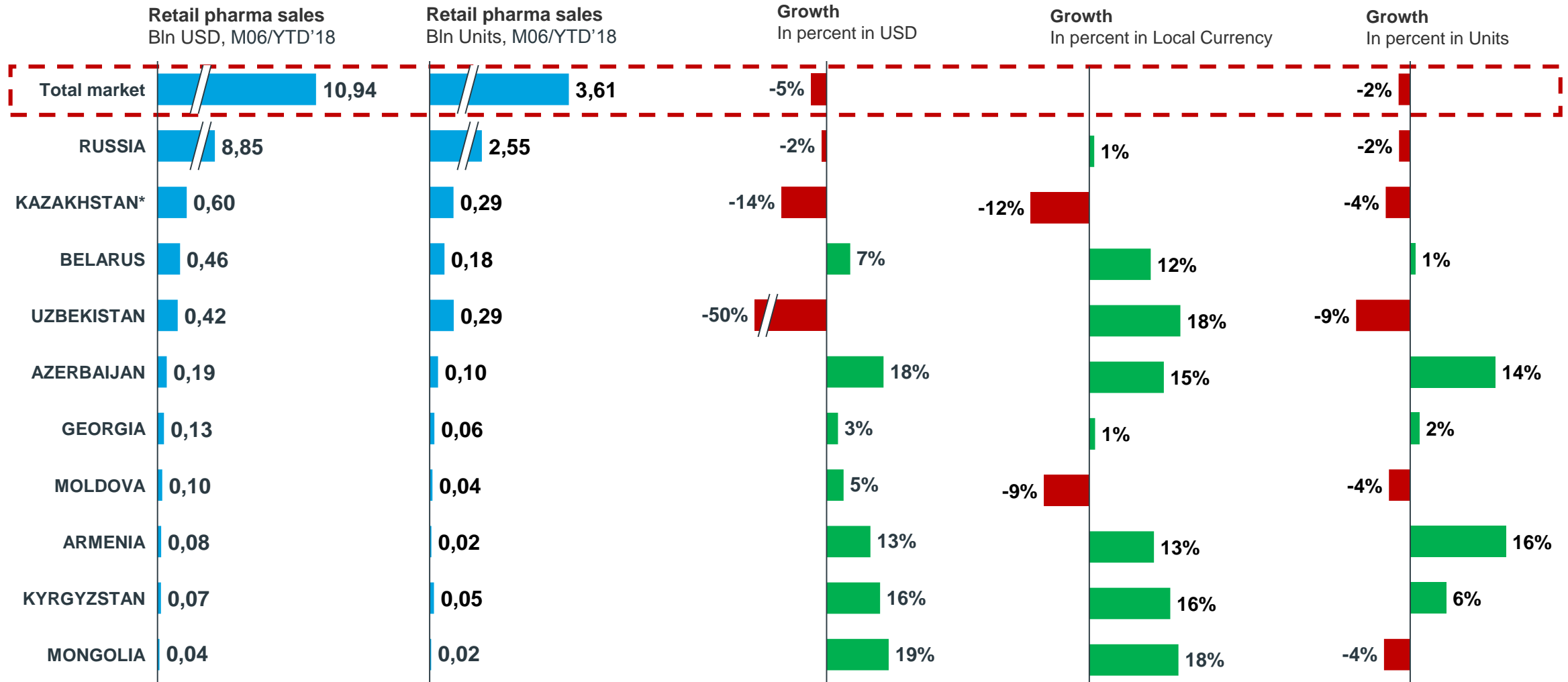


Facts from IQVIA

M06 2018

EAEU & CIS, Russia Countries ranking in January-June 2018, Total market, Value in Bln. USD and Units

Total Market grows by 17% in LC and decreases by -5% in USD and -2% in volume

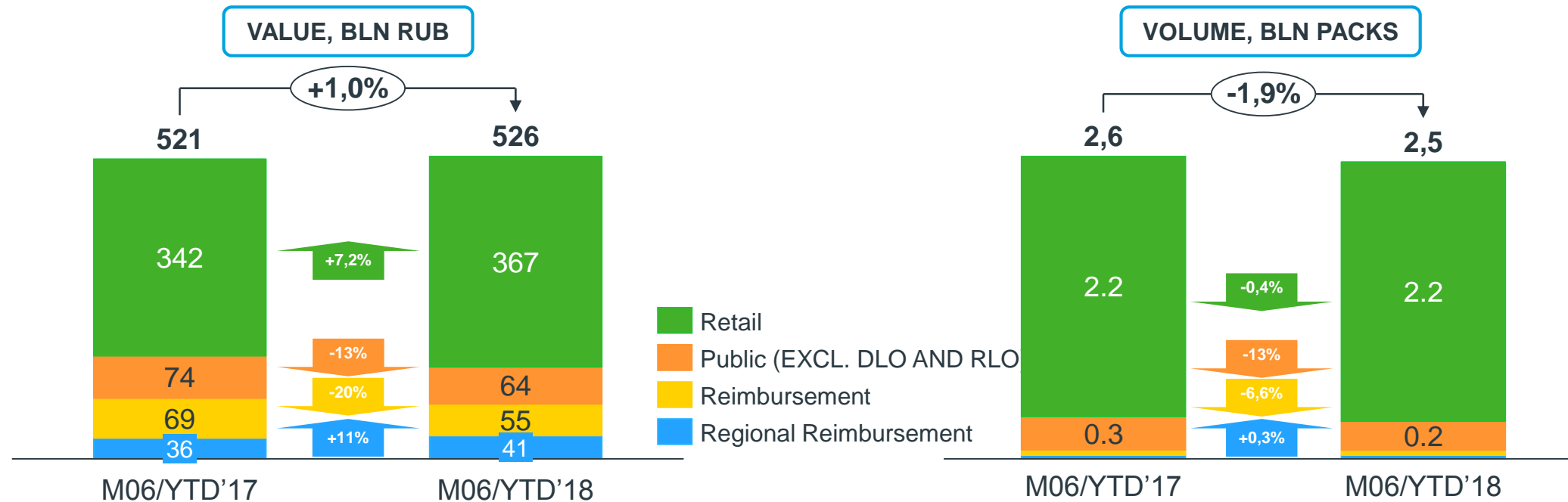


Source: IQVIA databases. Retail and Non-Retail (excluding food supplements and diagnostic agents), TRD Prices . Azerbaijan, Georgia and Armenia – retail only. Mongolia – Import
 *Kazakhstan figures will be increased by 5-10% after recalculation of public segment that will happen with M07 data release



Russia pharma market growth in January-June 2018

Market increased by +1,0% in value and decreases by -1,9% in volume

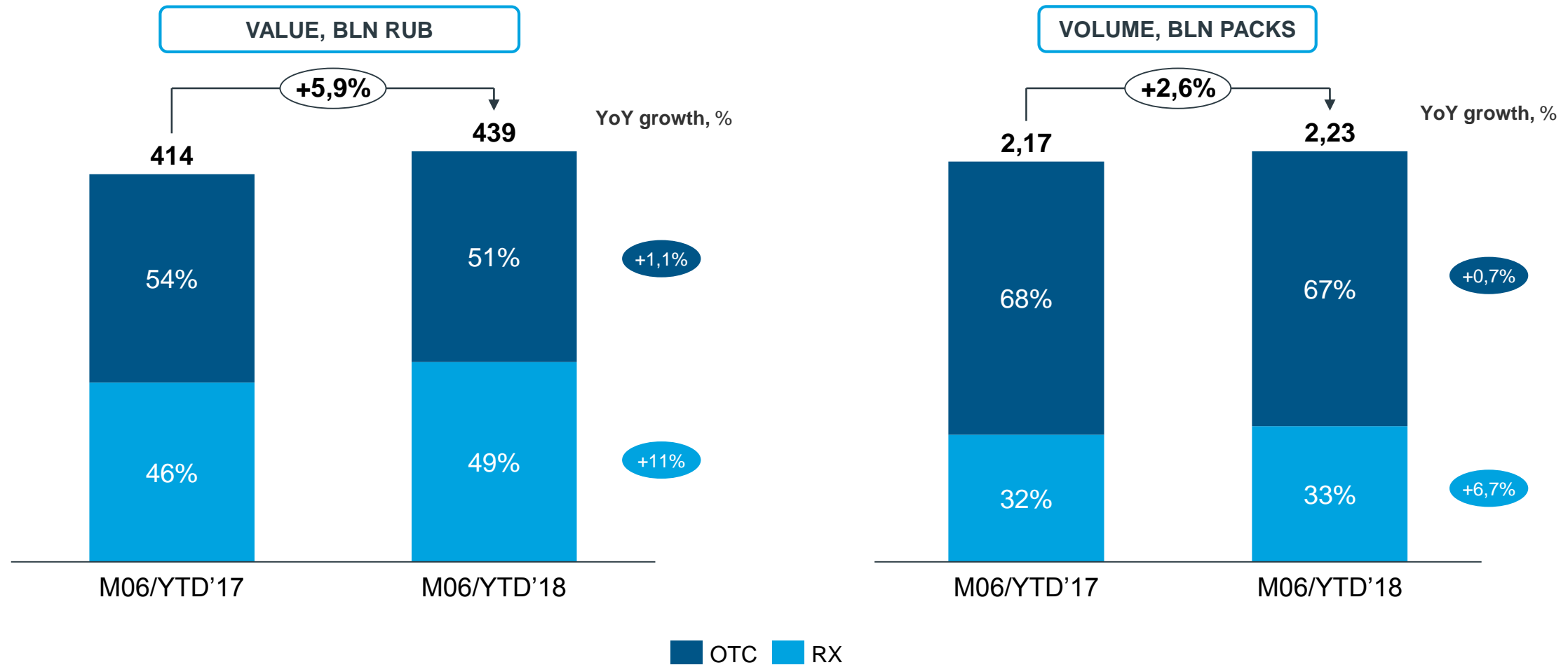


Indicator	RUB	USD	EUR	PACKS
Value M06/YTD 2018, Bln.	526	8,9	7,3	2,5
Growth M06/YTD,%	▲ +1,0%	▼ -1,6%	▼ -12%	▼ -1,9%



Russia pharma market growth in January-June 2018

Retail Sell-Out: Market grew by 5,9% in value and 2,6% in volume

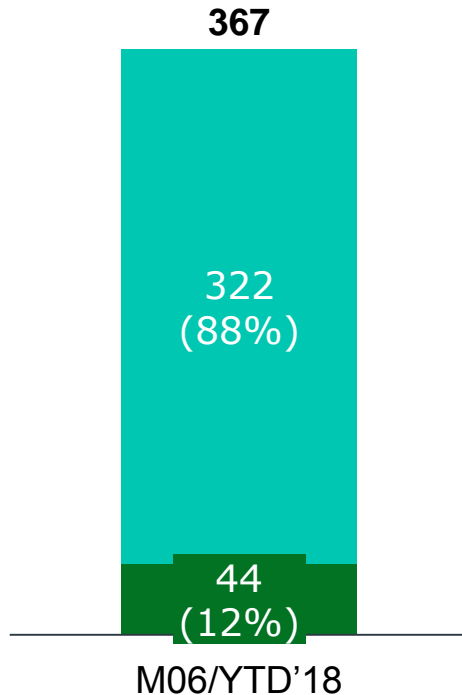




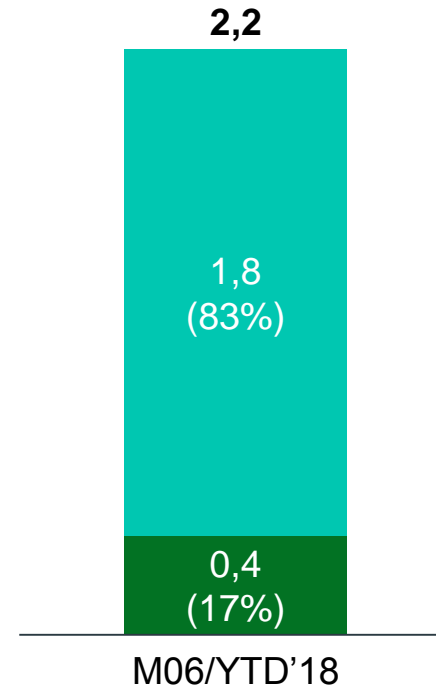
Russia retail market structure in January-June 2018

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

VALUE, BLN RUB



VOLUME, BLN PACKS

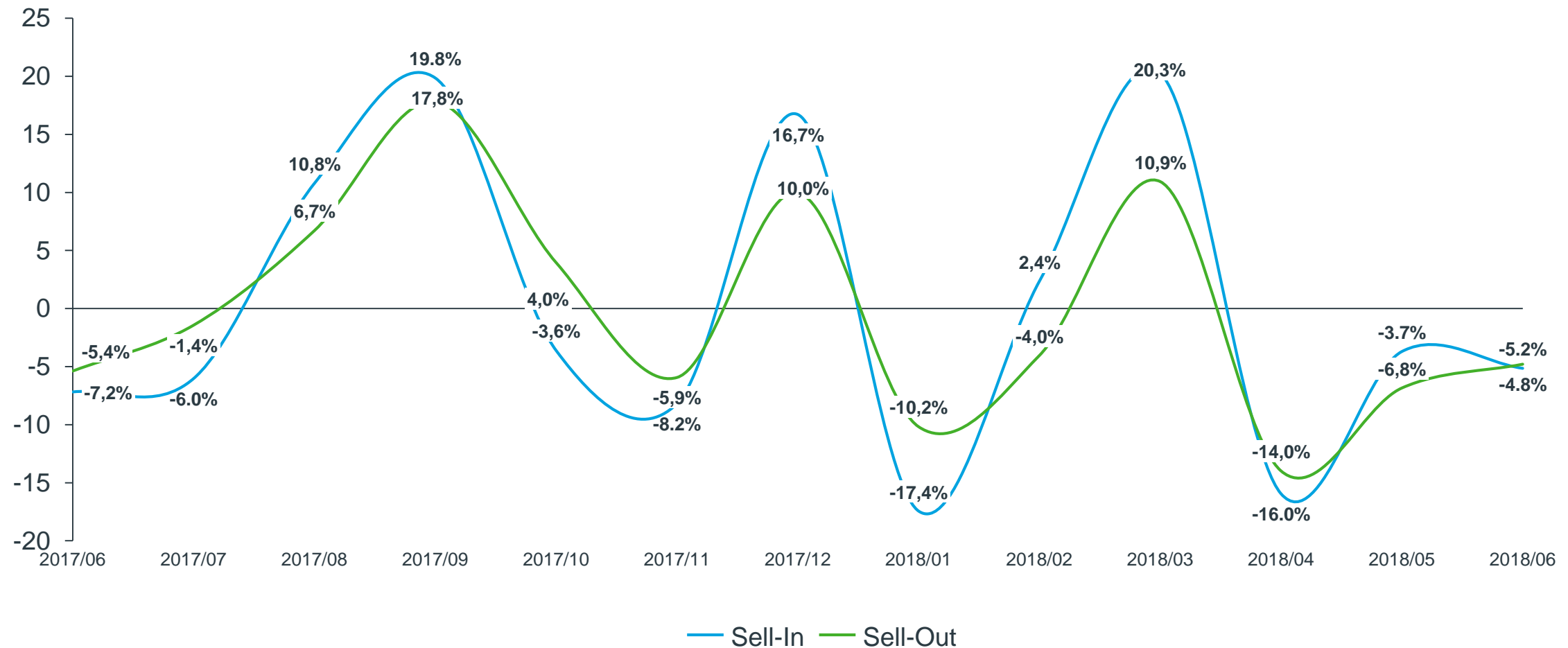


Pharmacy Chains
Individual pharmacies



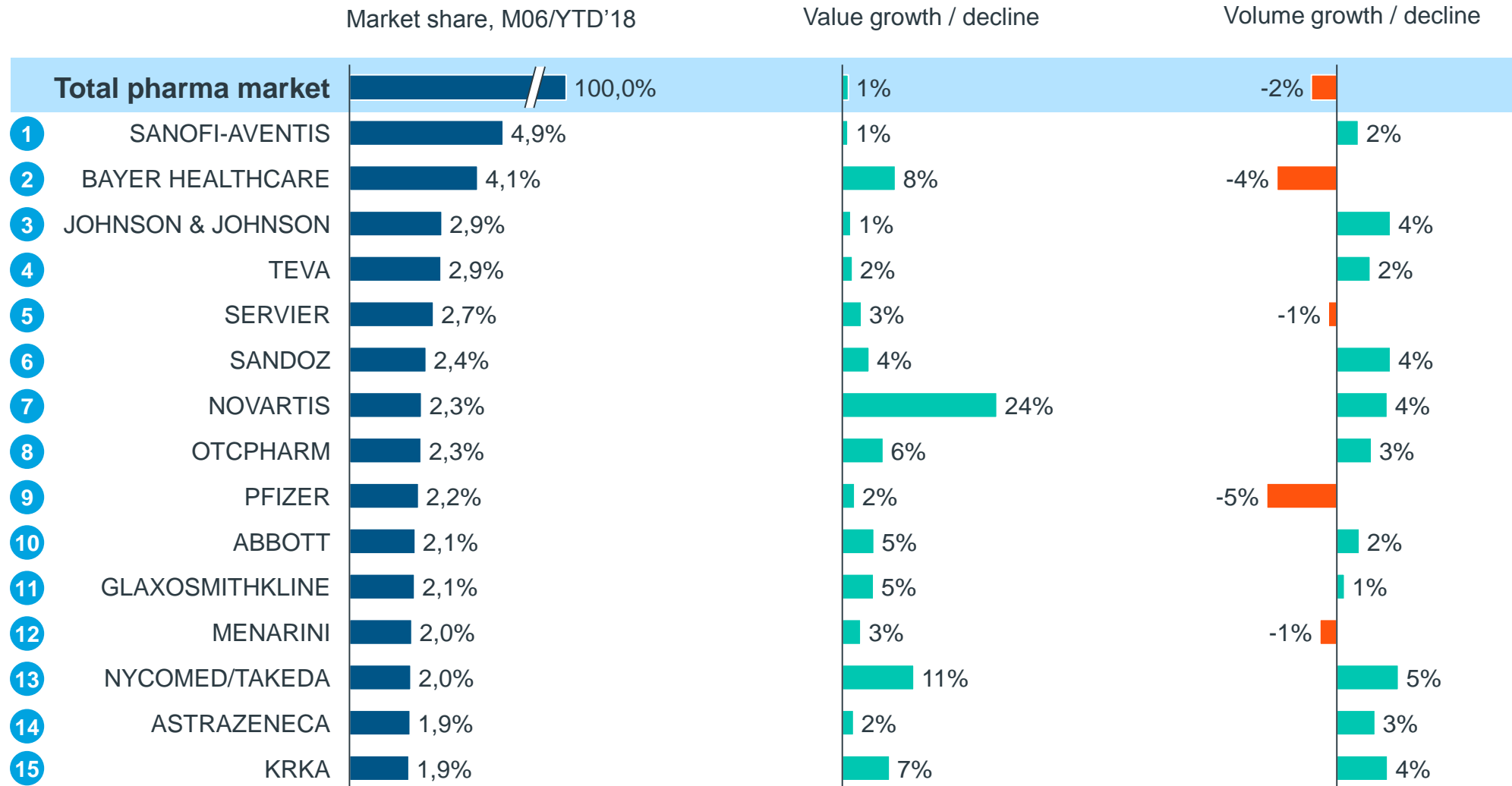
Sell-In vs Sell-Out, OTC registered drugs

Month-Over-Month Growth Rates, volume



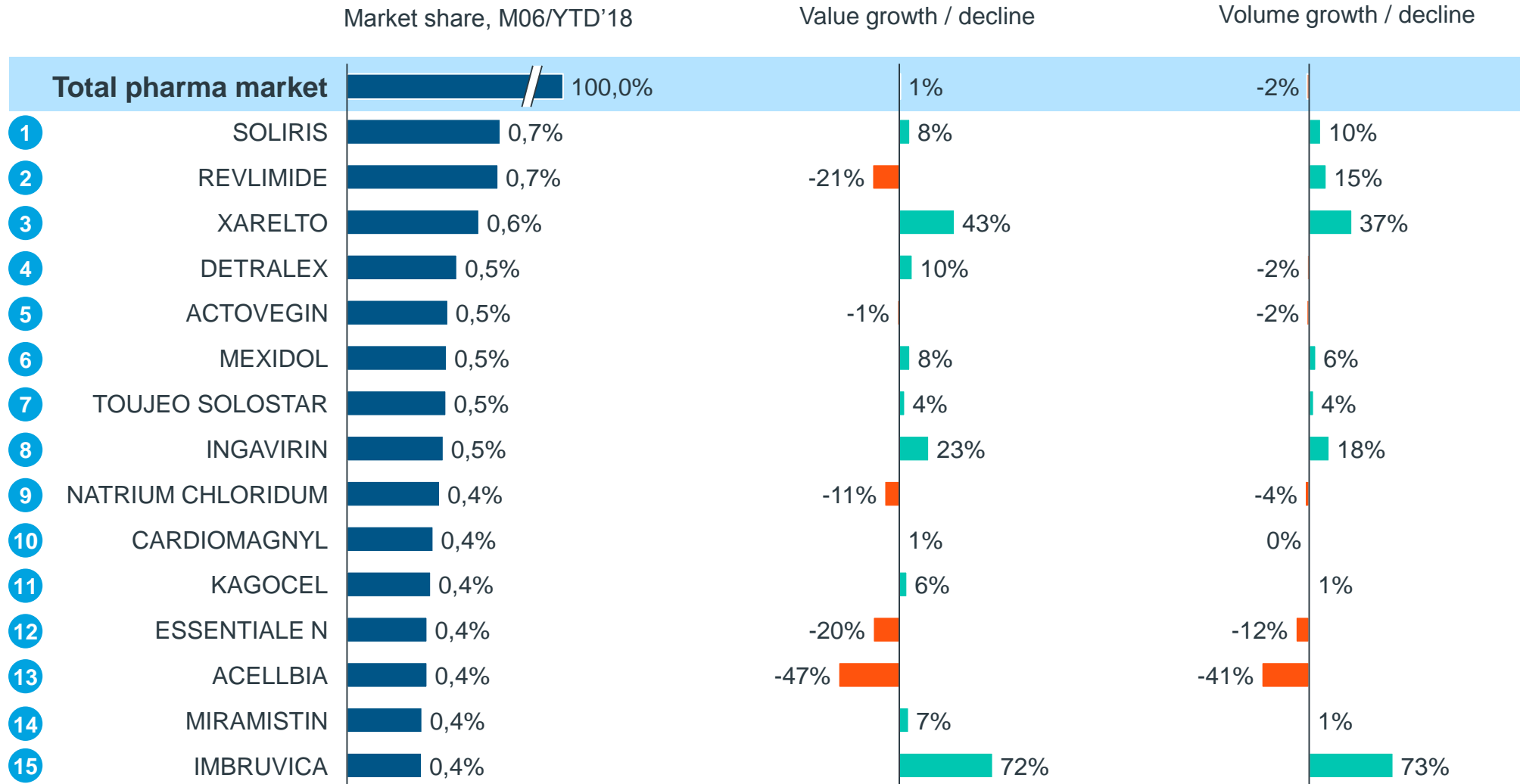


TOP-15 corporations on Russian market, January-June 2018



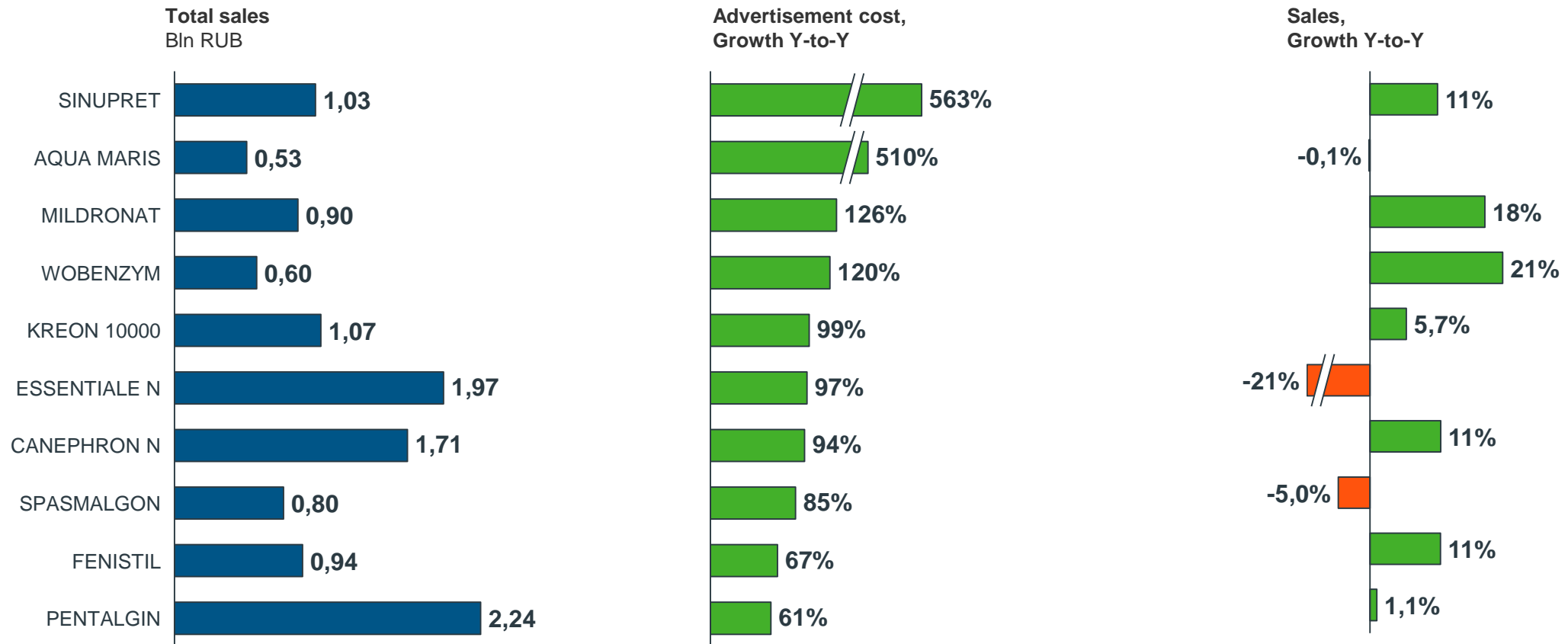


TOP-15 brands on Russian market, January-June 2018



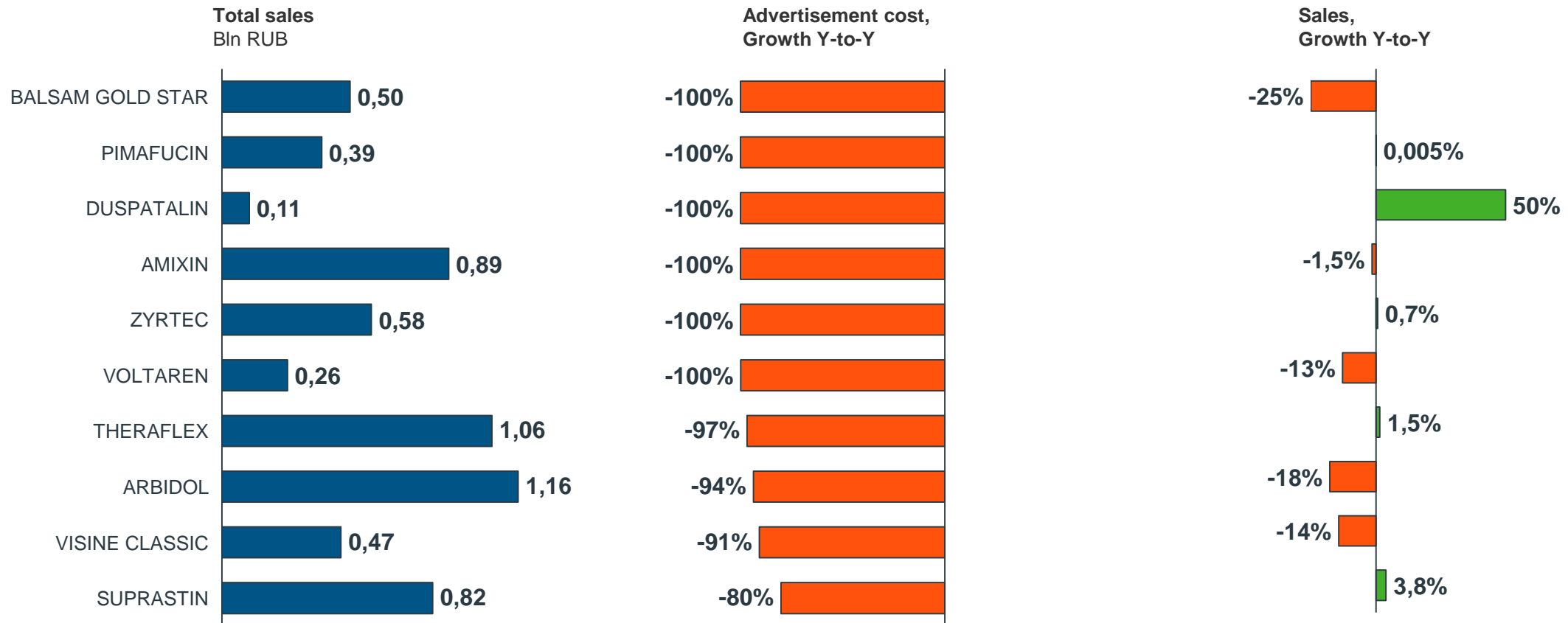
Source: IQVIA databases. Retail, Public, DLO, RLO (excluding food supplements and diagnostic agents), TRD Prices

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



The rank is calculated among TOP-200 Products 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-June 2018

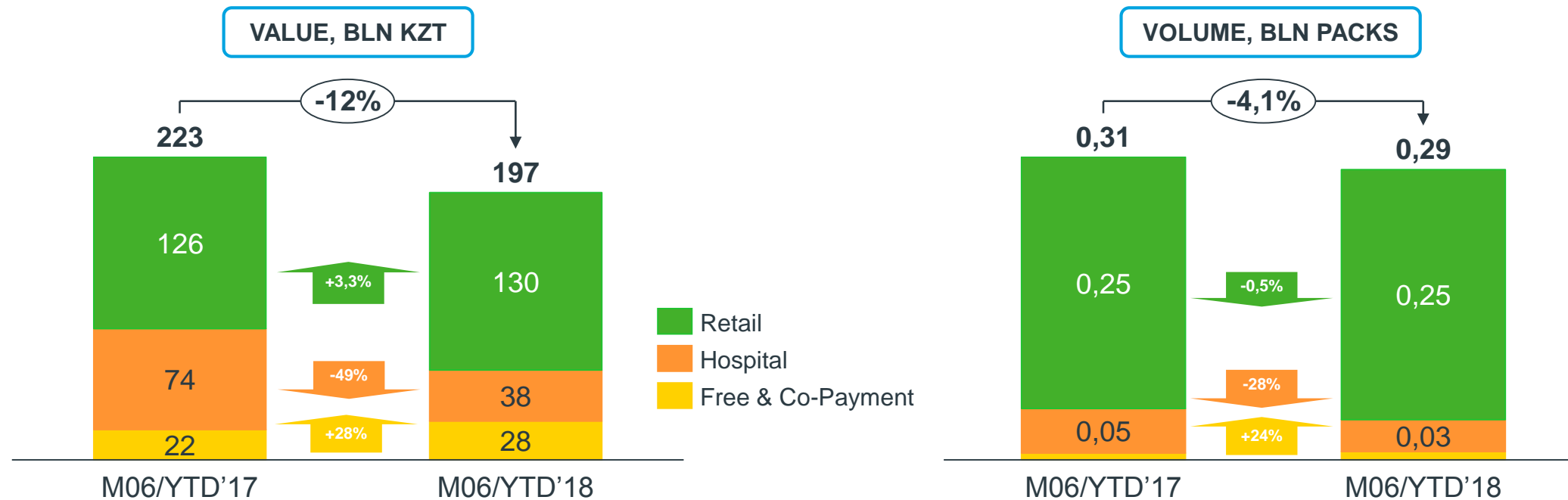


The rank is calculated among TOP-200 Products by sales with advertising cost greater than 50 mln RUB
 Source: IQVIA databases. Pharamtrend, Mediascope data, FIN Prices



Kazakhstan pharma market growth in January-June 2018

Market decreased* by -12% in value and -4,1% in volume

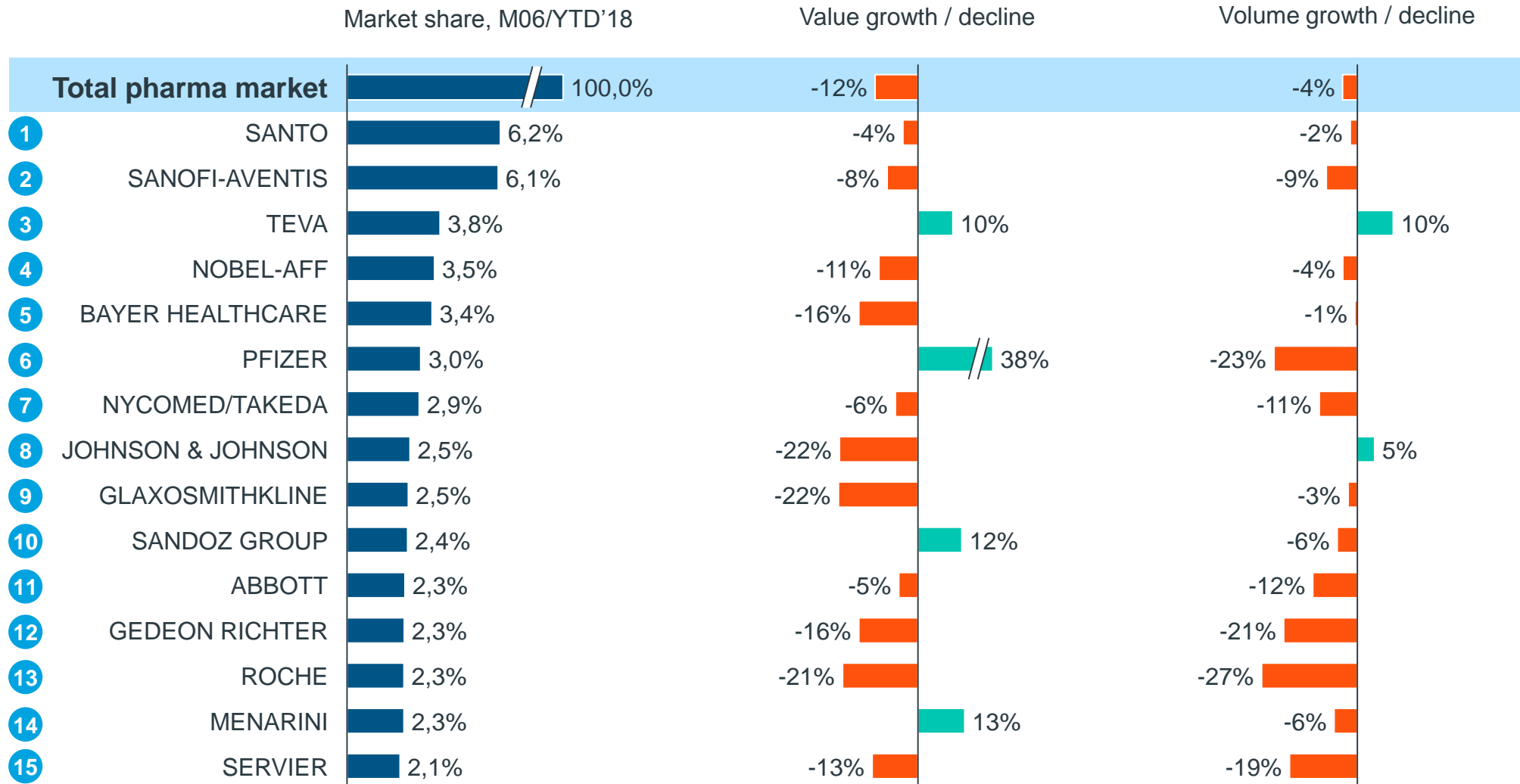


Indicator	KZT	USD	EUR	PACKS
Value M06/YTD 2018, Bln.	197	0,60	0,50	0,29
Growth M06/YTD,%	▼ -12%	▼ -14%	▼ -23%	▼ -4,1%

Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices
 *Kazakhstan figures will be increased by 5-10% after recalculation of public segment that will happen with M07 data release



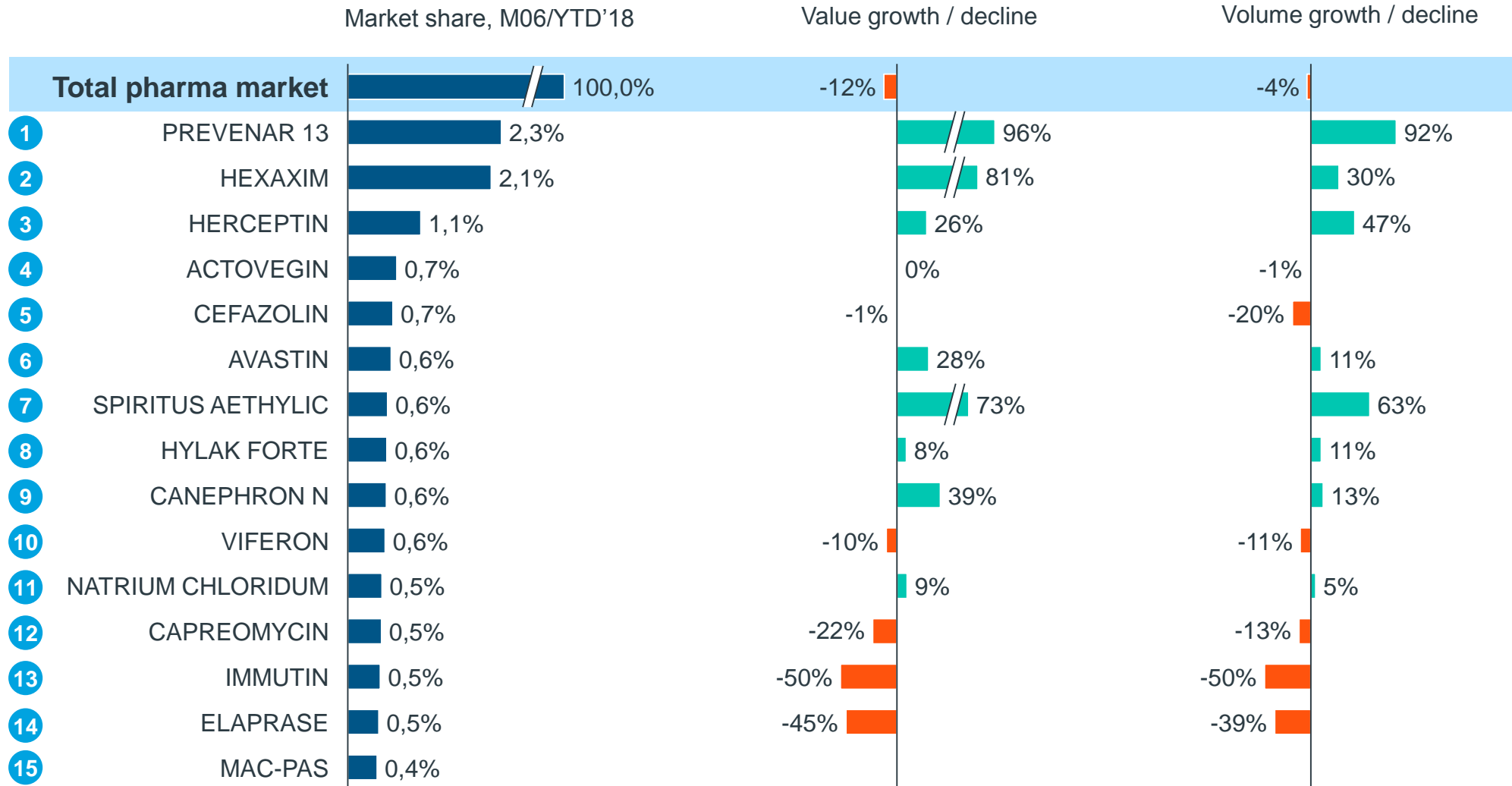
TOP-15 corporations on Kazakhstan market, January-June 2018



Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices
 *Kazakhstan figures will be increased by 5-10% after recalculation of public segment that will happen with M07 data release



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

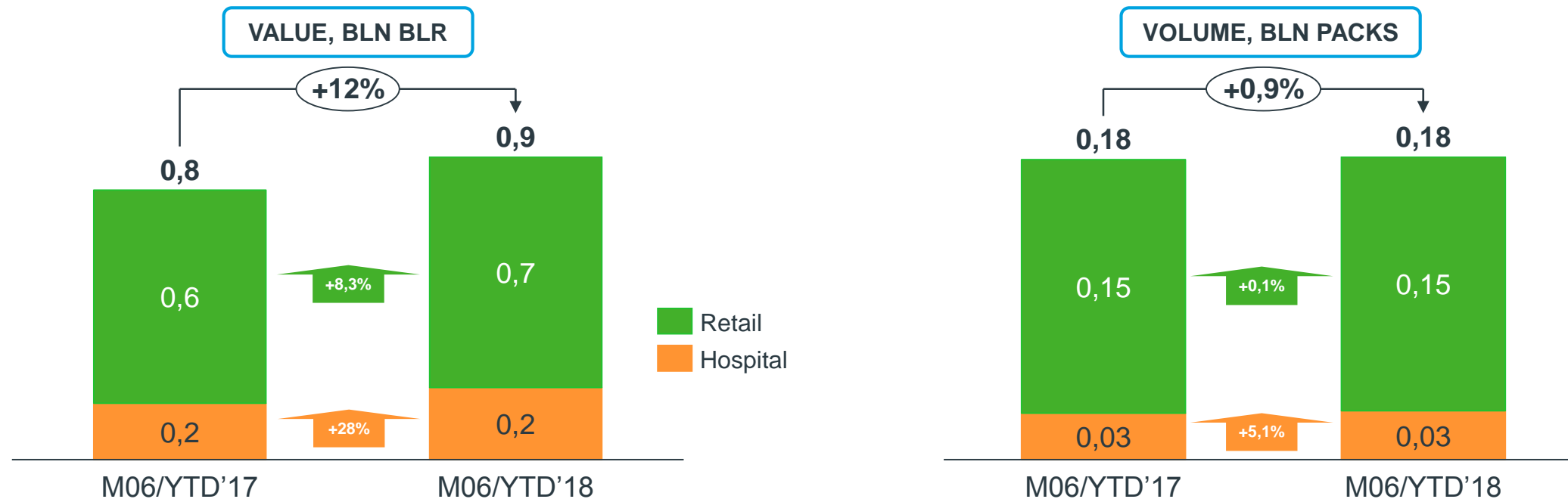


Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices
 *Kazakhstan figures will be increased by 5-10% after recalculation of public segment that will happen with M07 data release



Belarus pharma market growth in January-June 2018

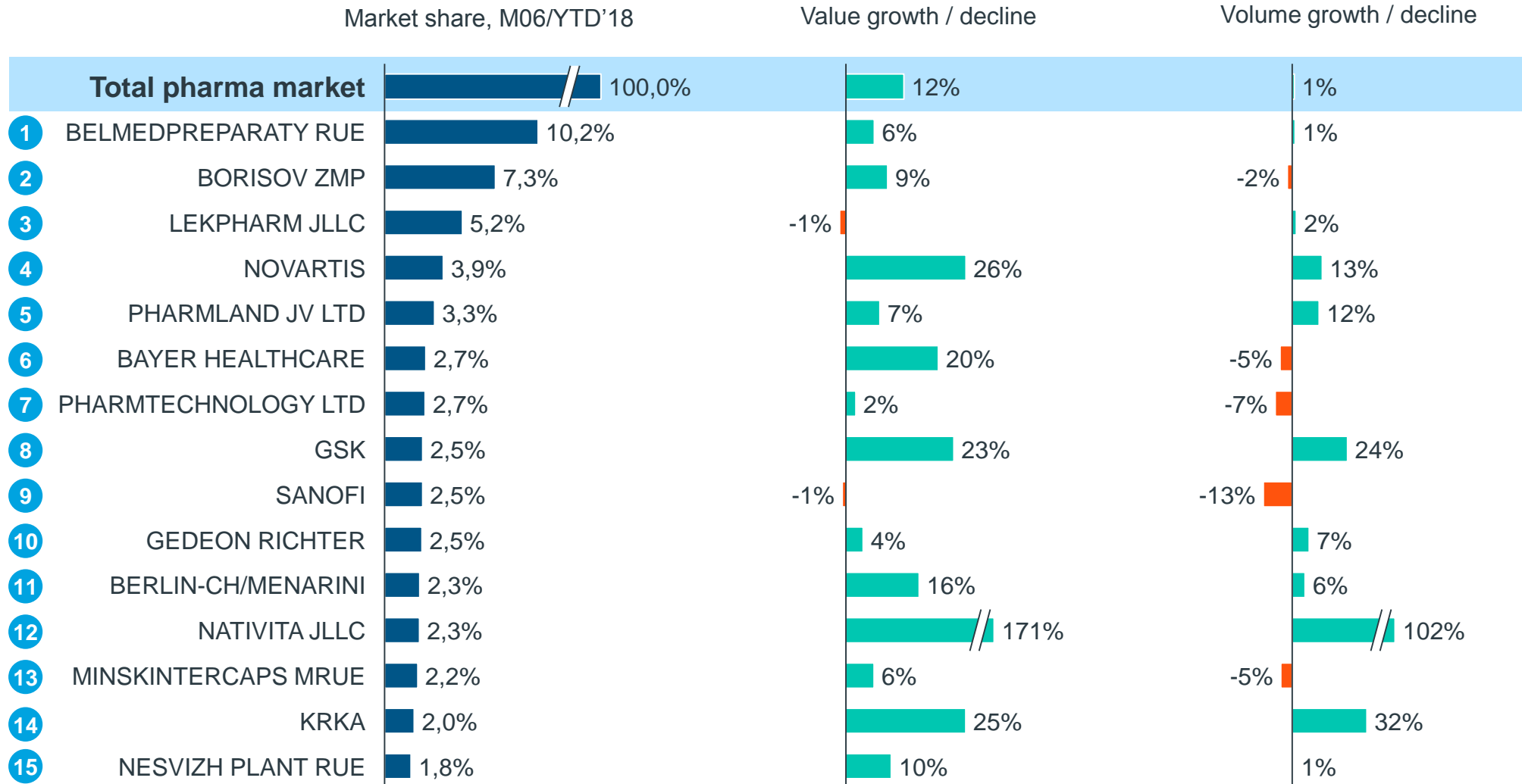
Market grew by +12% in value and +0,9% in volume



Indicator	BLR	USD	EUR	PACKS
Value M06/YTD 2018, Bln.	0,92	0,46	0,38	0,18
Growth M06/YTD,%	▲ +12%	▲ +7,3%	▼ -4,4%	▲ +0,9%

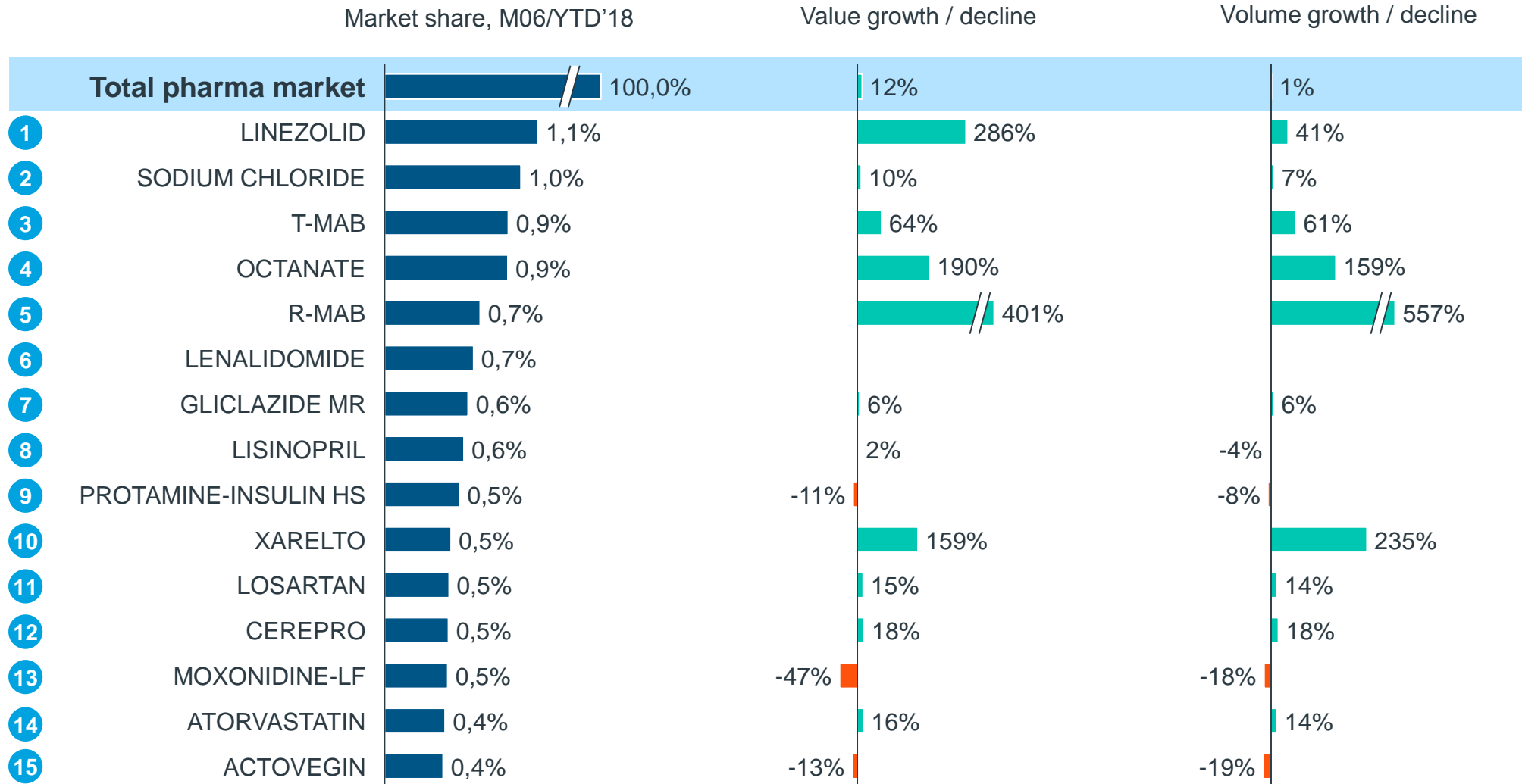


TOP-15 corporations on Belarus market, January-June 2018





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

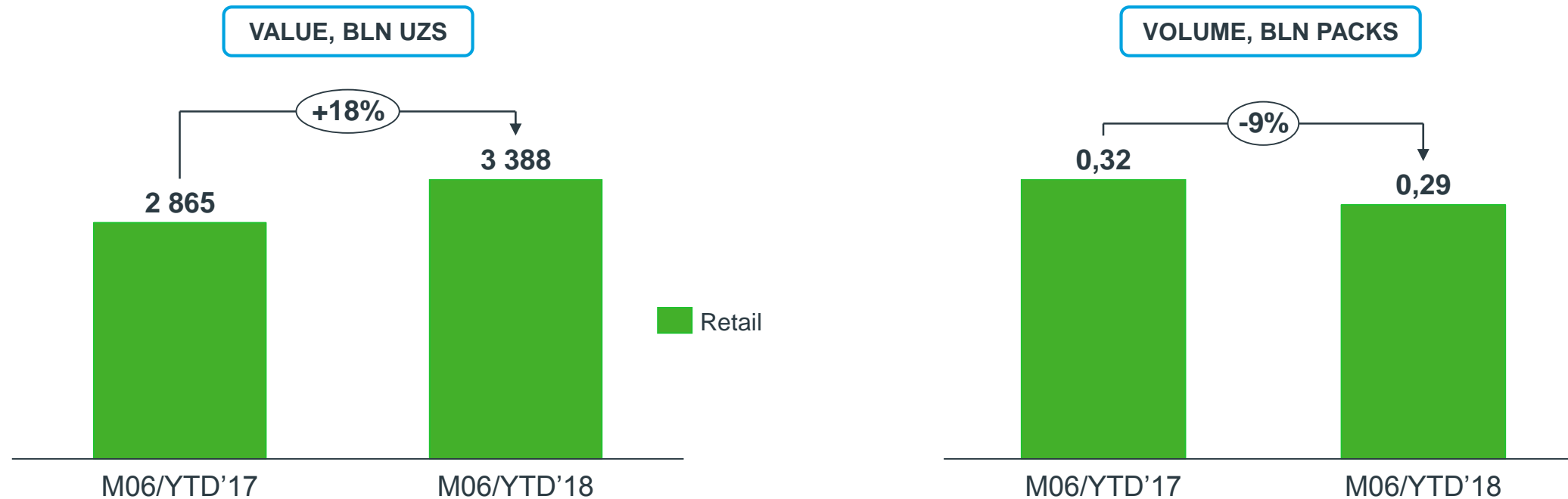


Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices



Uzbekistan pharma market growth in January-June 2018

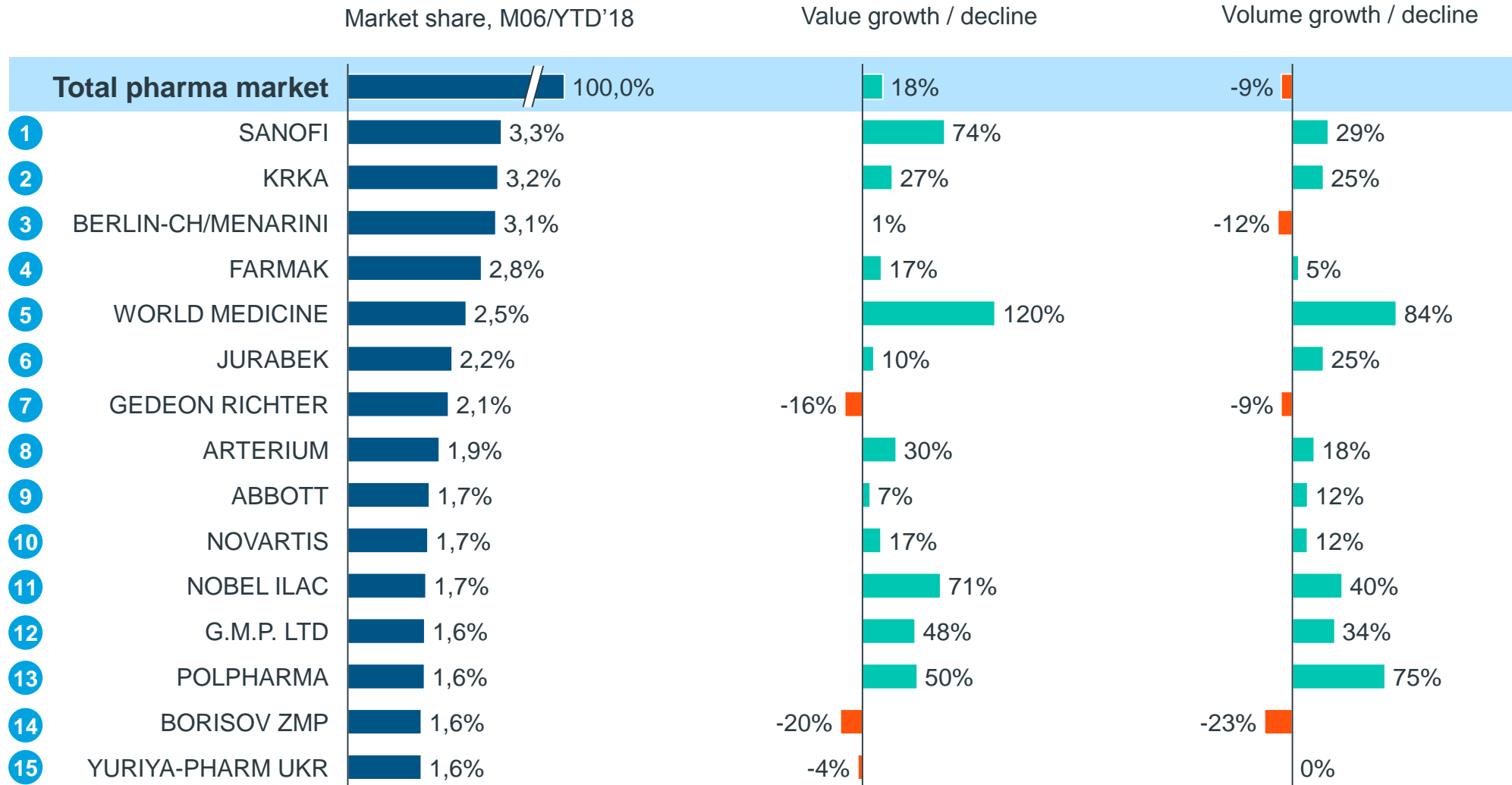
Market grew by +18% in value and decreases by -9% in volume



Indicator	UZS	USD	EUR	PACKS
Value M06/YTD 2018, Bln.	3 388	0,42	0,1	0,09
Growth M06/YTD,%	▲ +18%	▼ -50%	▼ -5,5%	▼ -9,1%



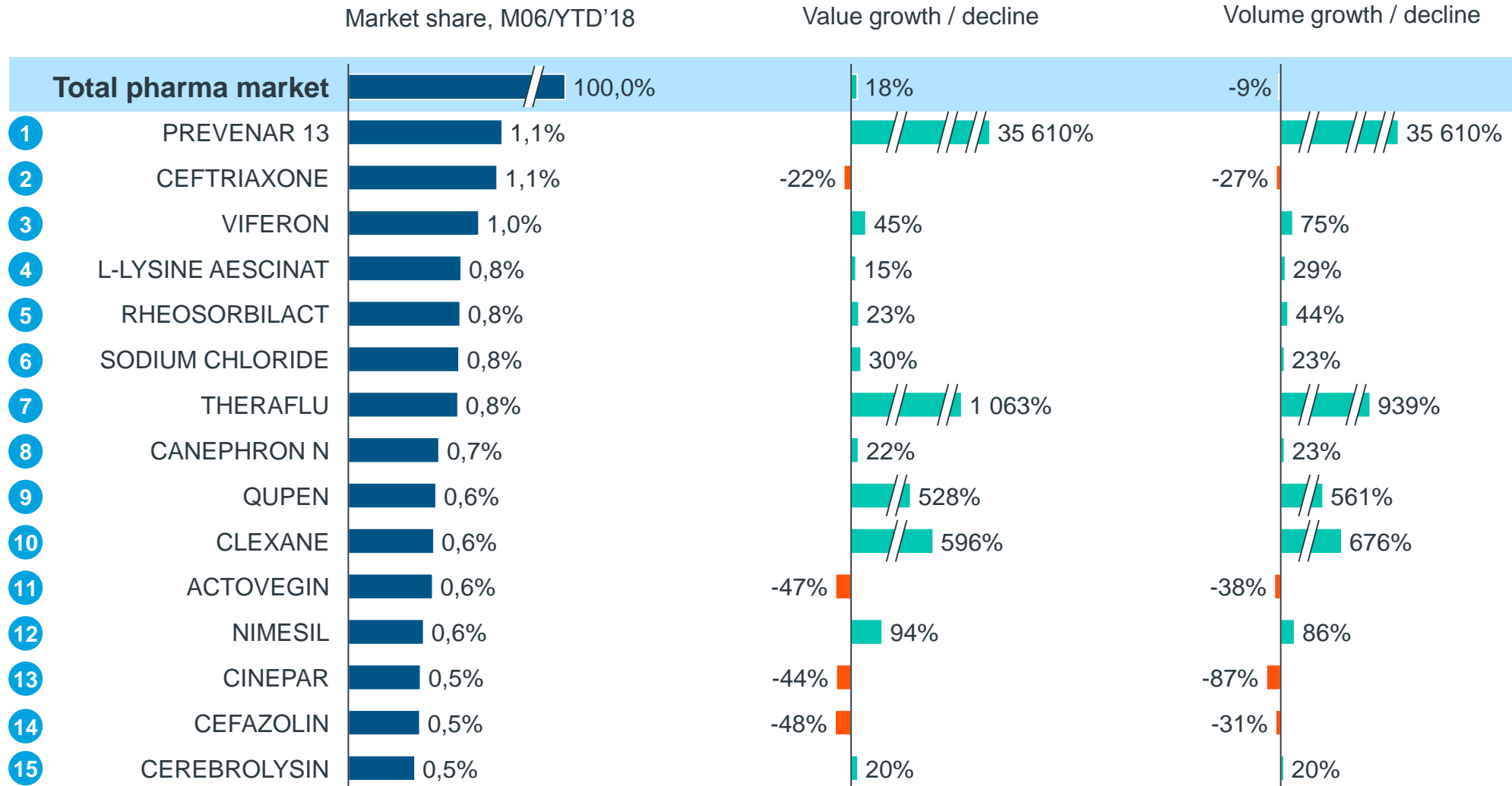
TOP-15 corporations on Uzbekistan market, January-June 2018



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



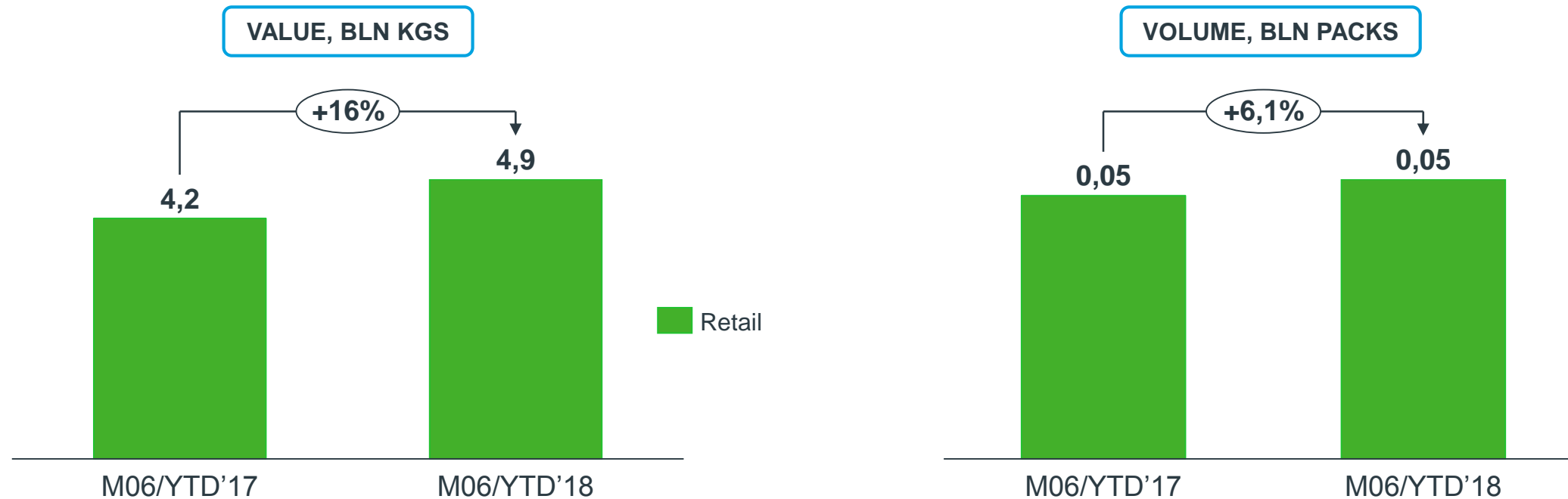
TOP-15 brands on Uzbekistan market, January-June 2018





Kyrgyzstan pharma market growth in January-June 2018

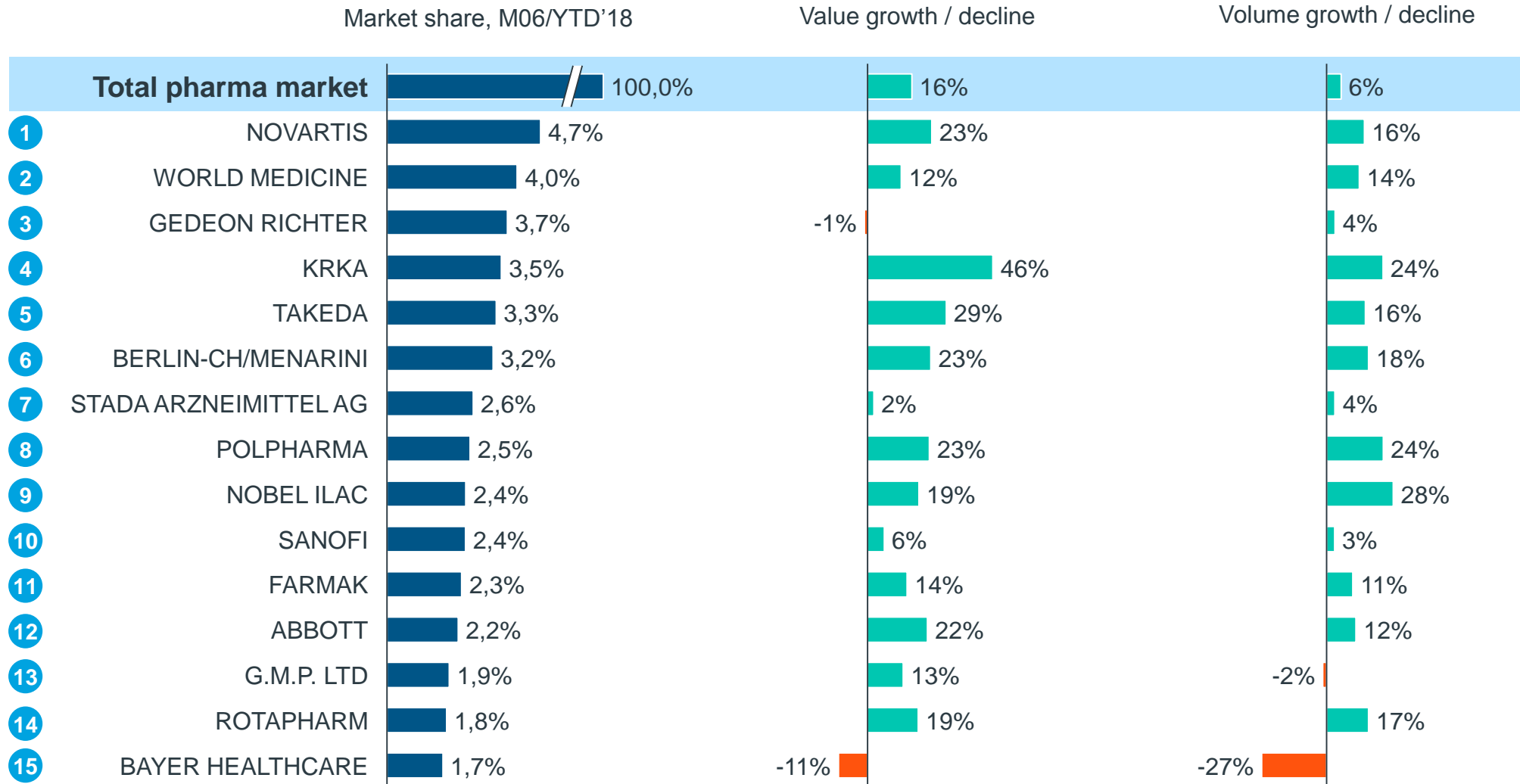
Market grew by +16% in value and +6,1% in volume



Indicator	KGS	USD	EUR	PACKS
Value M06/YTD 2018, Bln.	4,9	0,07	0,06	0,05
Growth M06/YTD,%	▲ +16%	▲ +16%	▲ +4,2%	▲ +6,1%

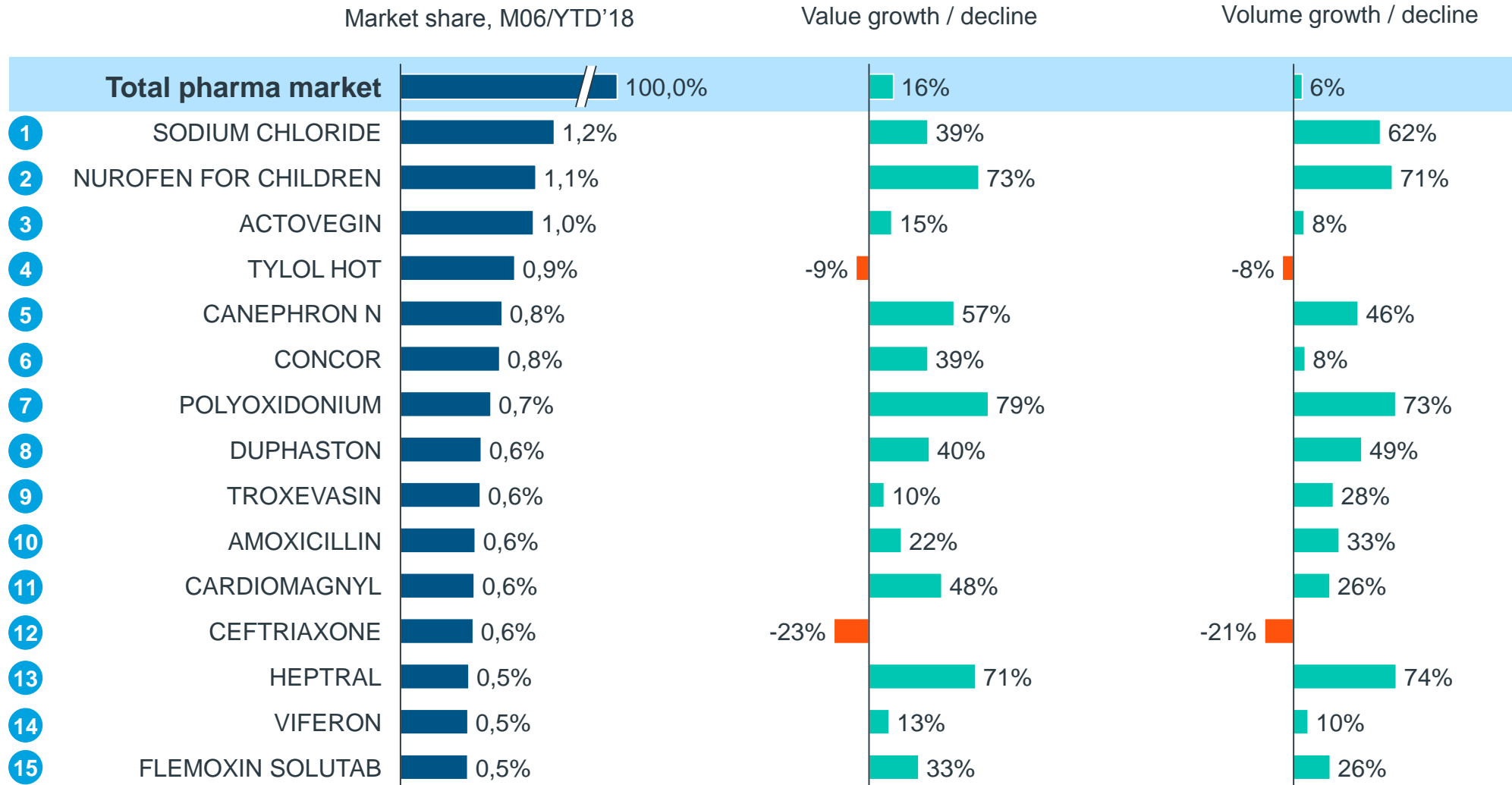


TOP-15 corporations on Kyrgyzstan market, January-June 2018





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

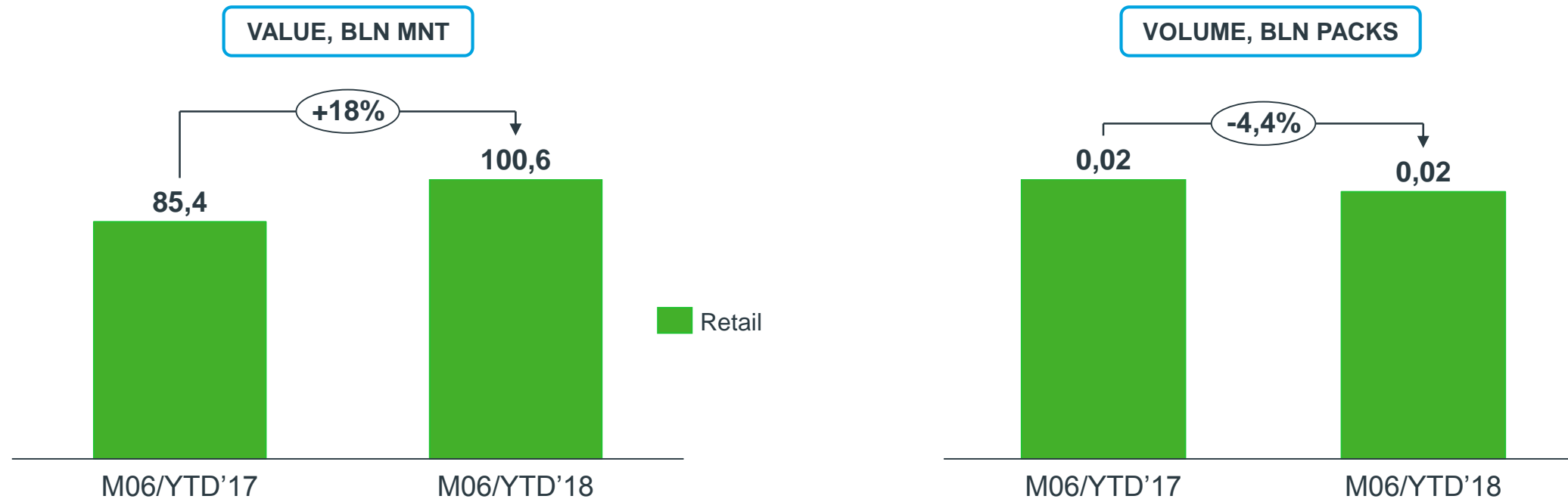


Source: IQVIA databases. Retail and Hospital Market (exclude food supplements and diagnostic agents), TRD Prices



Mongolian pharma market growth in January-June 2018

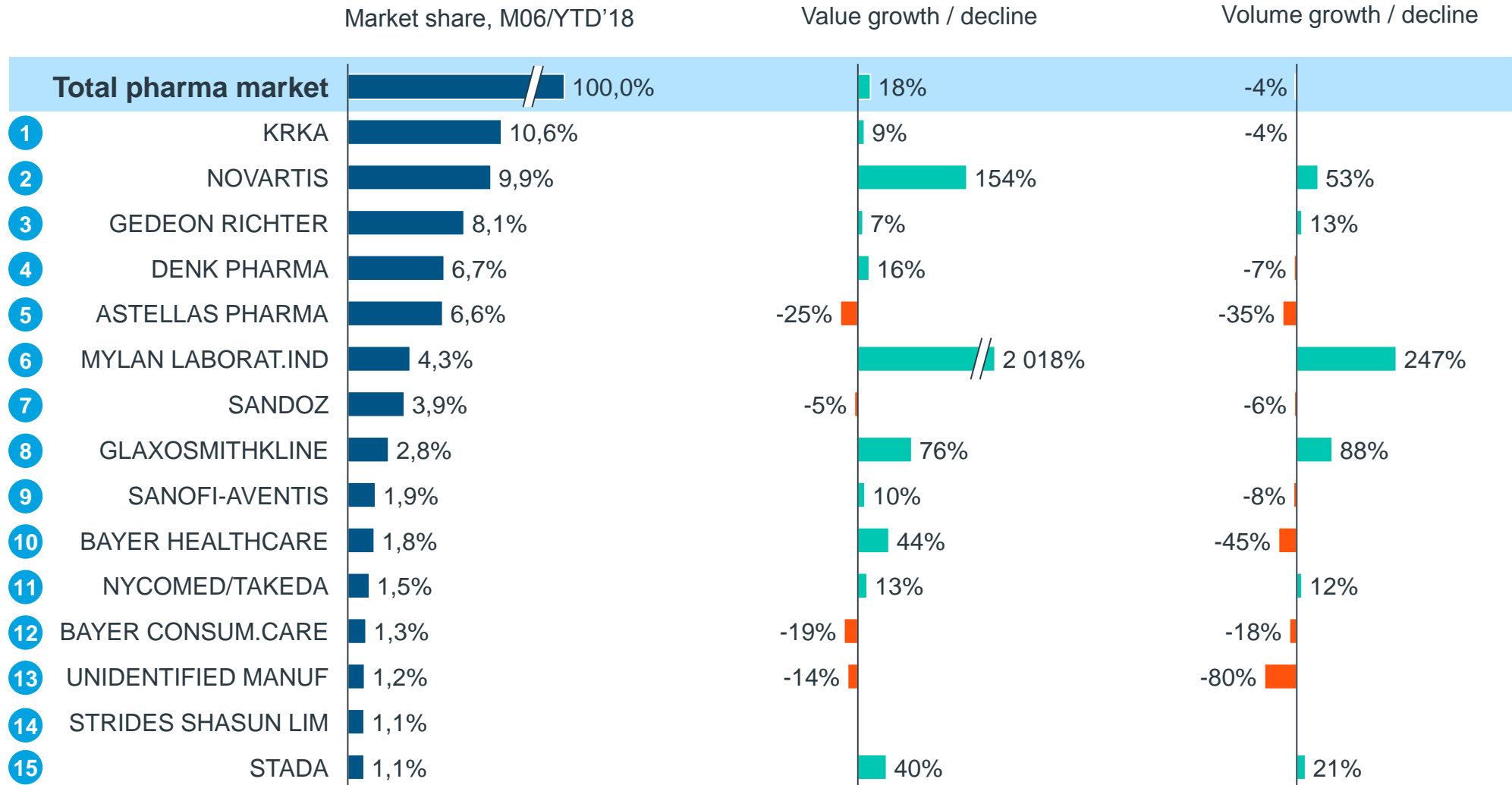
Market grew by +18% in value and decreases by -4,4% in volume



Indicator	MNT	USD	EUR	PACKS
Value M06/YTD 2018, Bln.	101	0,04	0,03	0,02
Growth M06/YTD,%	▲ +18%	▲ +19%	▲ +7,0%	▼ -4,4%



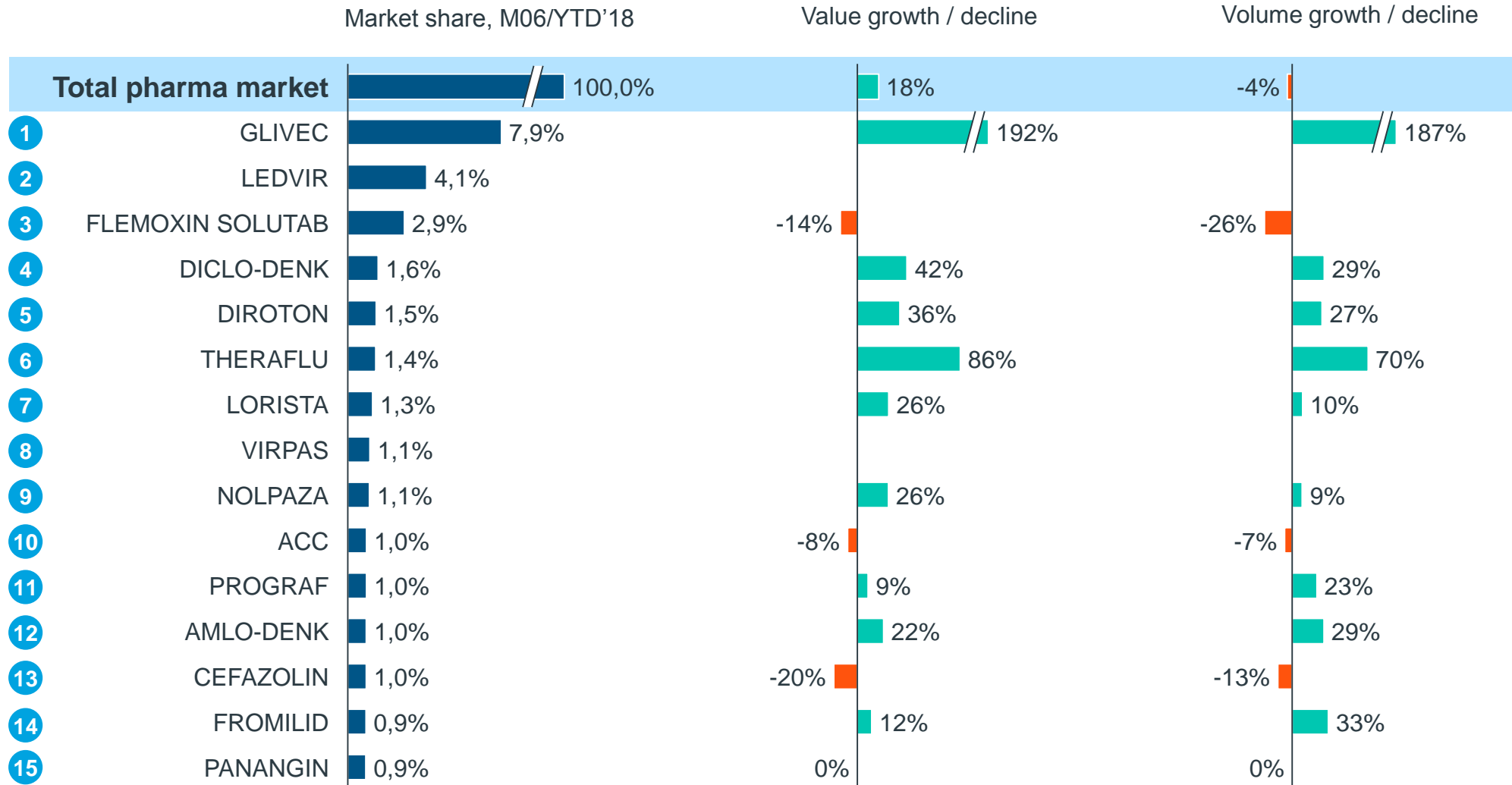
TOP-15 corporations on Mongolian market, January-June 2018



Source: IQVIA databases. Import statistics (exclude food supplements and diagnostic agents), TRD Prices



TOP-15 brands on Mongolian market, January-June 2018



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