



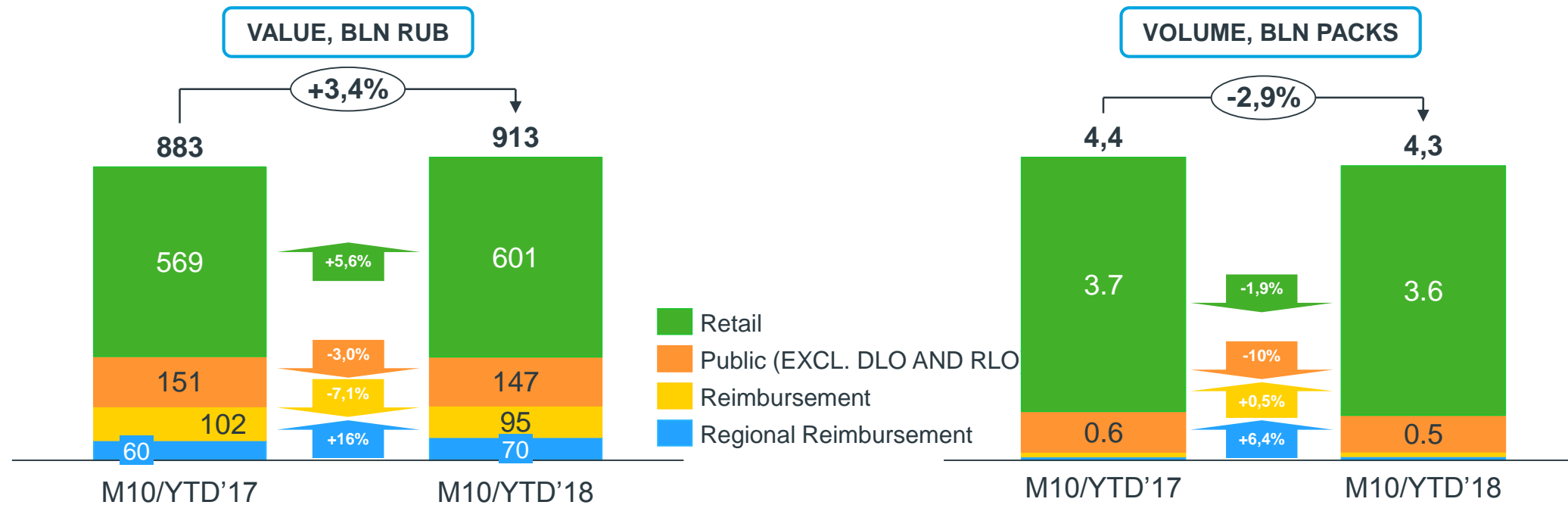
# Facts from IQVIA

M10 2018



# Russia pharma market growth in January-October 2018

Market grew by 3,4% in value and decreased by 2,9% in volume

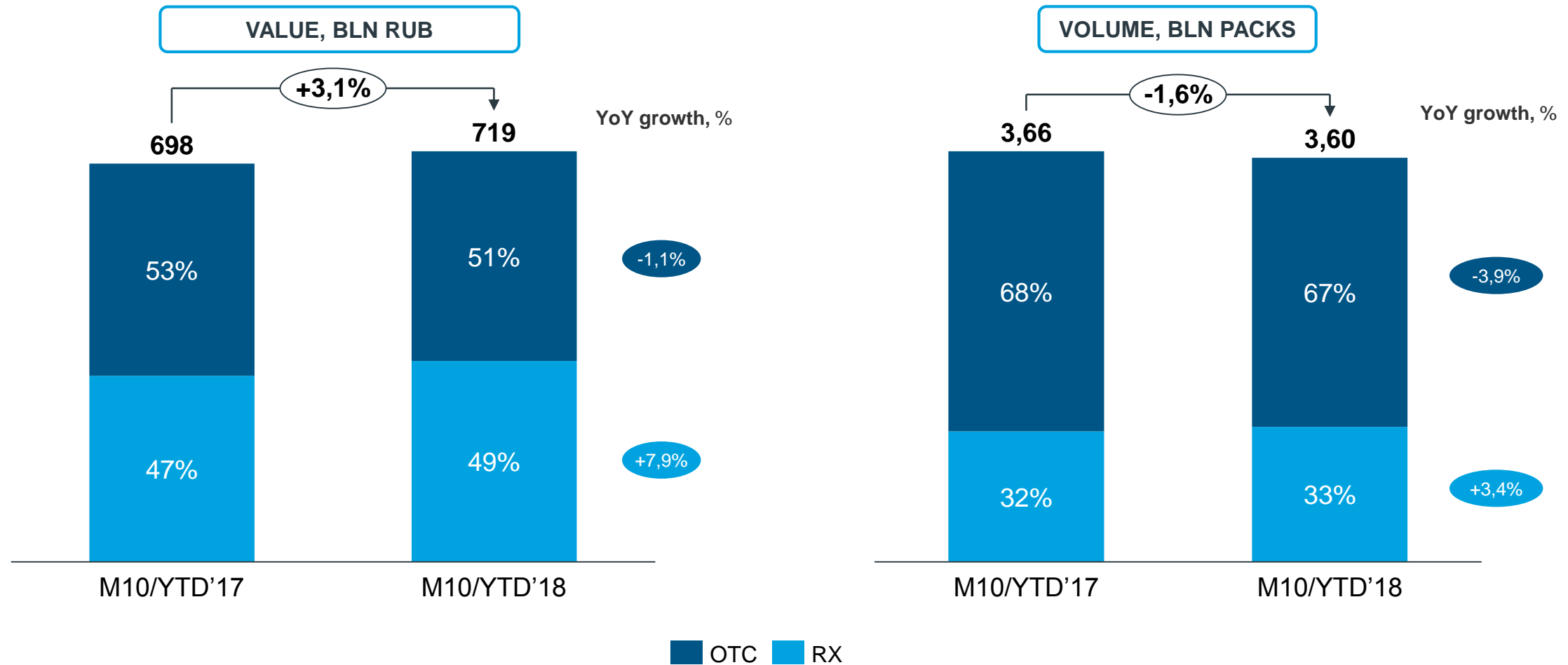


Indicator	RUB	USD	EUR	PACKS
Value M10/YTD 2018, Bln.	913	14,7	12,4	4,3
Growth M10/YTD,%	▲ 3,4%	▼ -2,8%	▼ -8,7%	▼ -2,9%



# Russia pharma market growth in January-October 2018

*Retail Sell-Out: Market grew by 3,1% in value and decreased by 1,6% in volume*

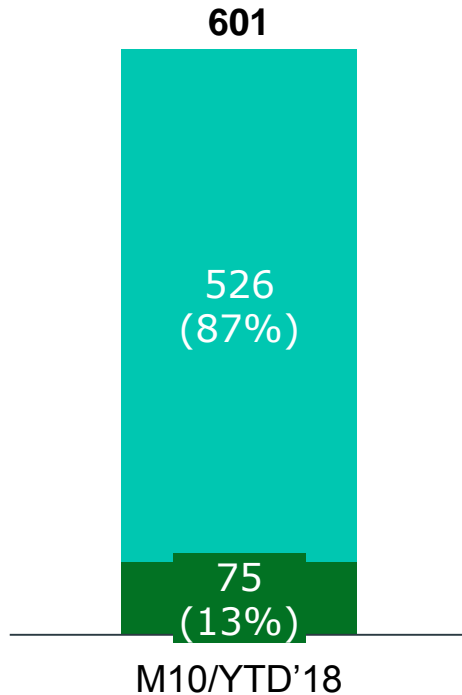




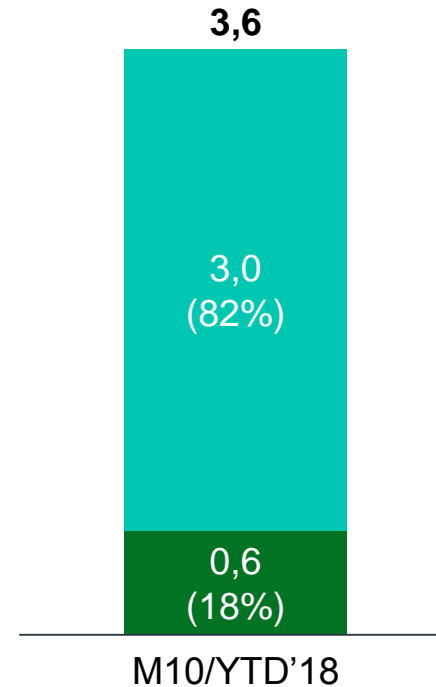
# Russia retail market structure in January-October 2018

*Retail Sell-In: Share of Pharmacy chains is 87% in value and 82% in volume*

VALUE, BLN RUB



VOLUME, BLN PACKS



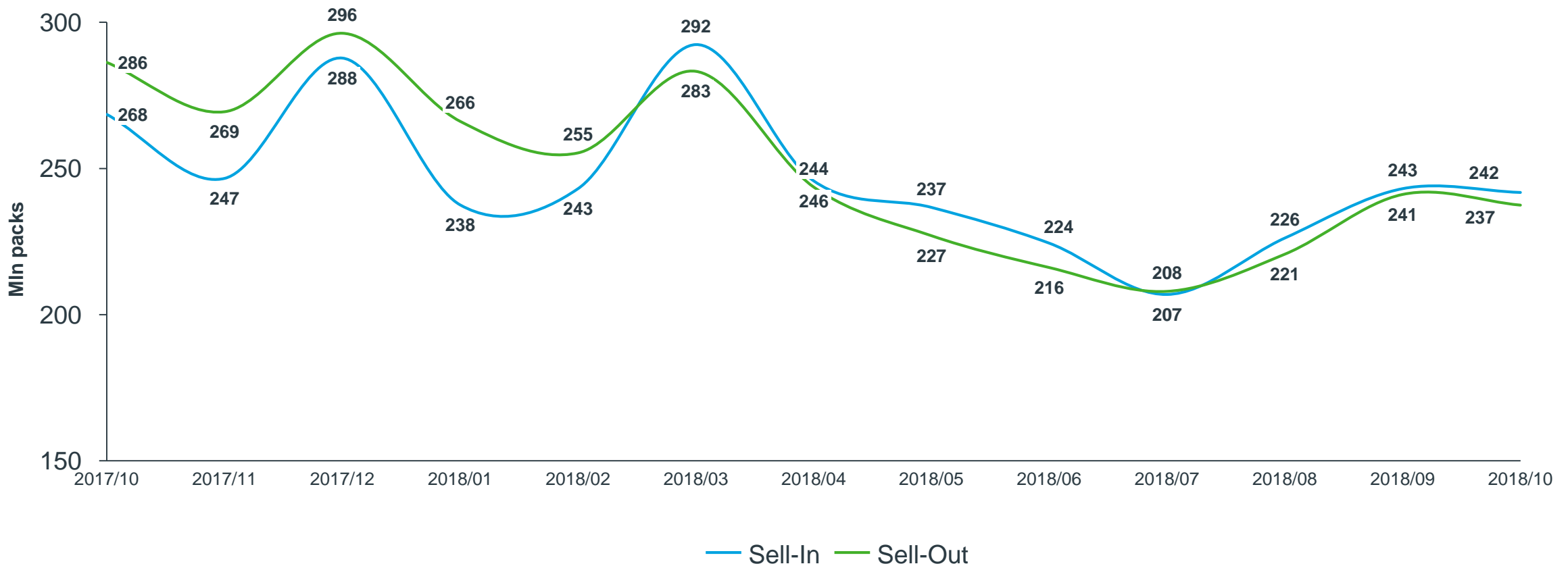
Pharmacy Chains  
Individual pharmacies

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



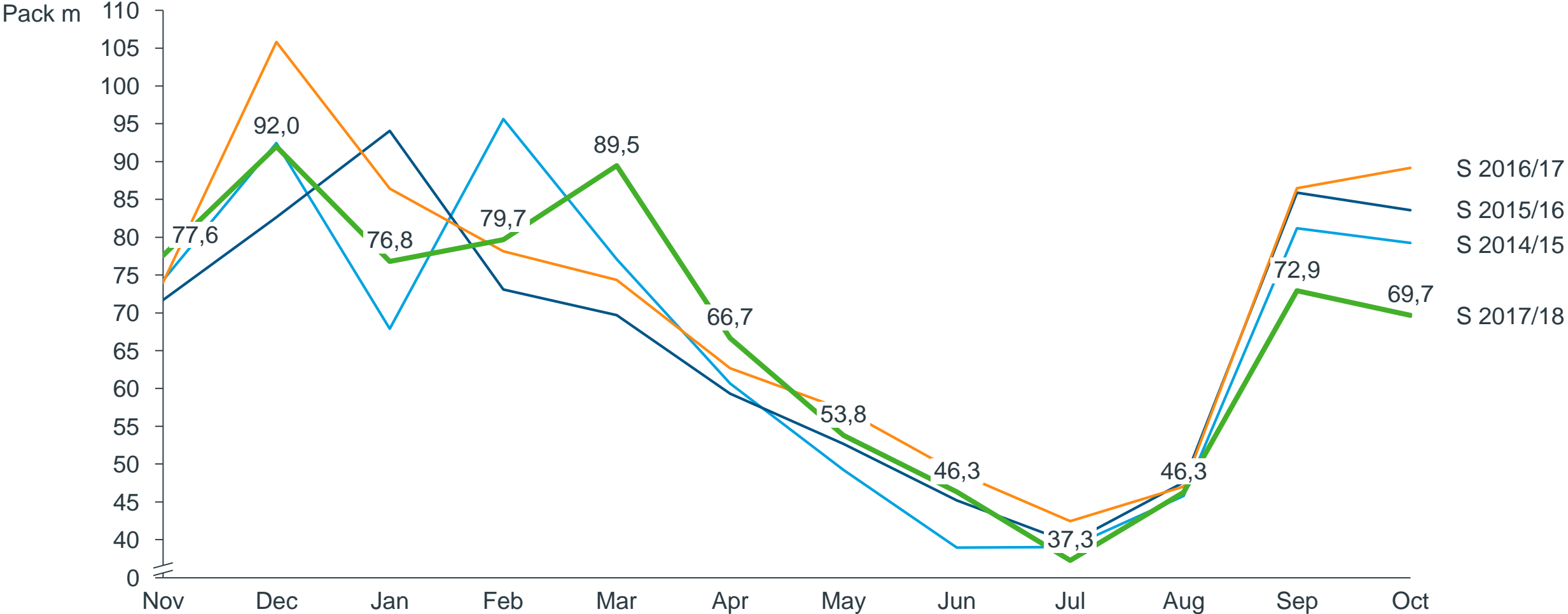
# Sell-In vs Sell-Out, OTC registered drugs

Volume, mln packs



# The 2017/18 cough & cold season was delayed with a peak in March, but this year's season start is the lowest in four years

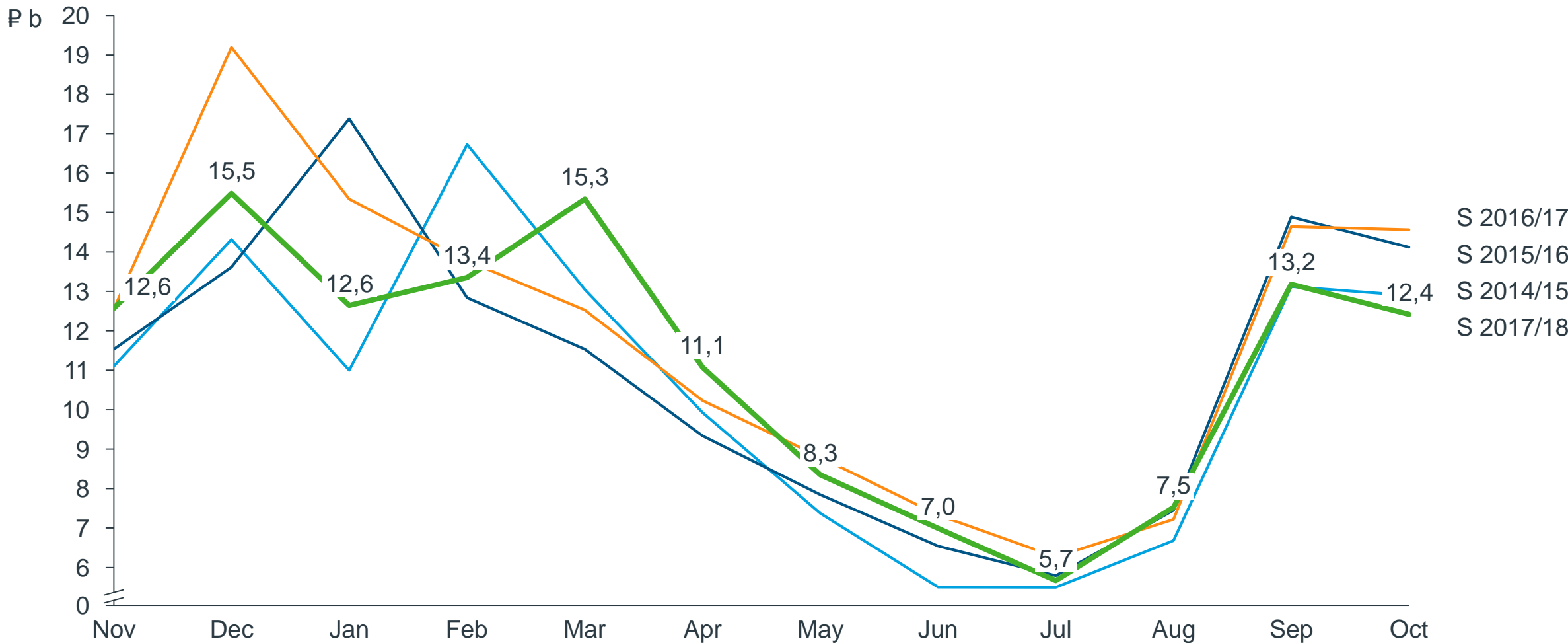
*Sales in million units pharmacy sell-out based on OTC categories 1A, 1B, 1C, 1F, 1V and 5F*



Source: IQVIA PharmaTrend monthly sell-out in million units  
© 2018 IQVIA – Facts October 2018

# Though overall selling at higher prices, the current season start is also in value (₽ at final consumer price) the worst in four years

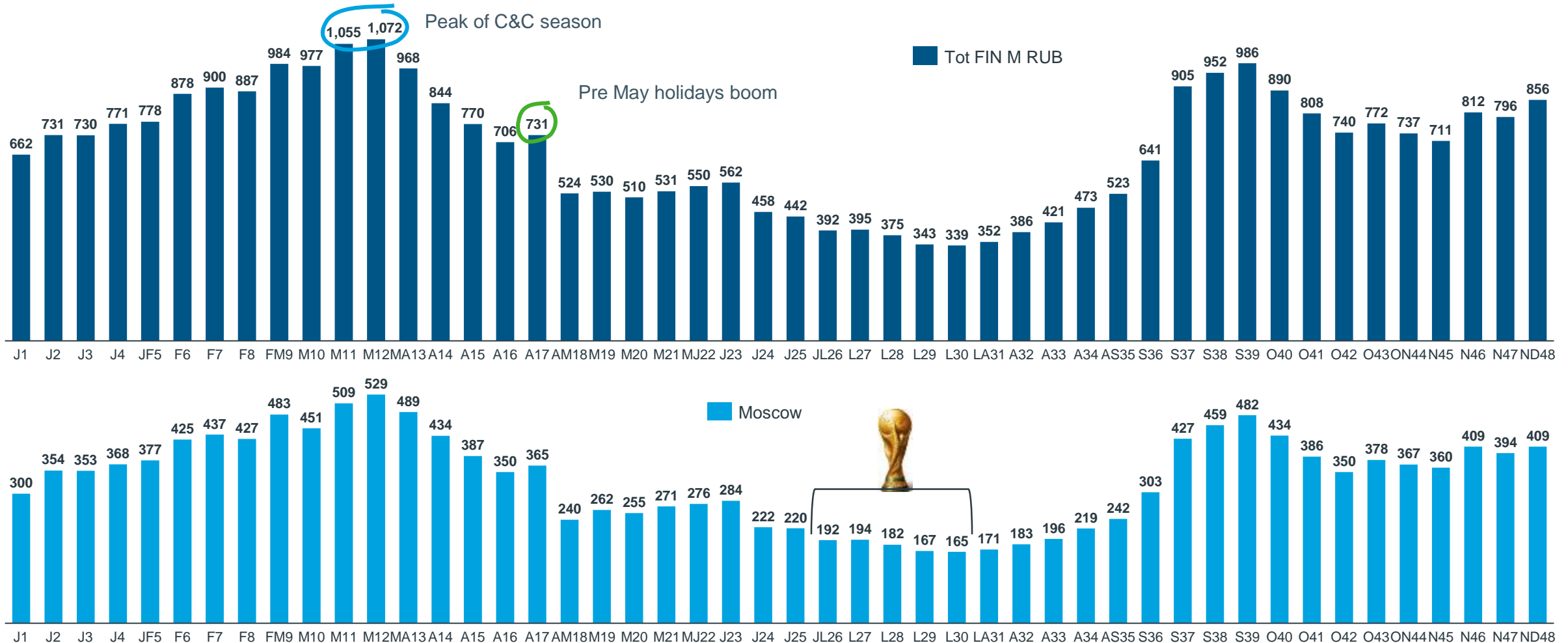
Sales in billion ₽ pharmacy sell-out based on OTC categories 1A, 1B, 1C, 1F, 1V and 5F



Source: IQVIA PharmaTrend monthly sell-out in billion RUB  
 © 2018 IQVIA – Facts October 2018

# When utilizing PharmaTrend weekly to look into November, the picture is hardly changing – so the competition will get tougher

Weekly development of the cough & cold market in Russia (covered regions) and Moscow in ₺ b



Source: IQVIA PharmaTrend weekly (sell-out at final consumer price)

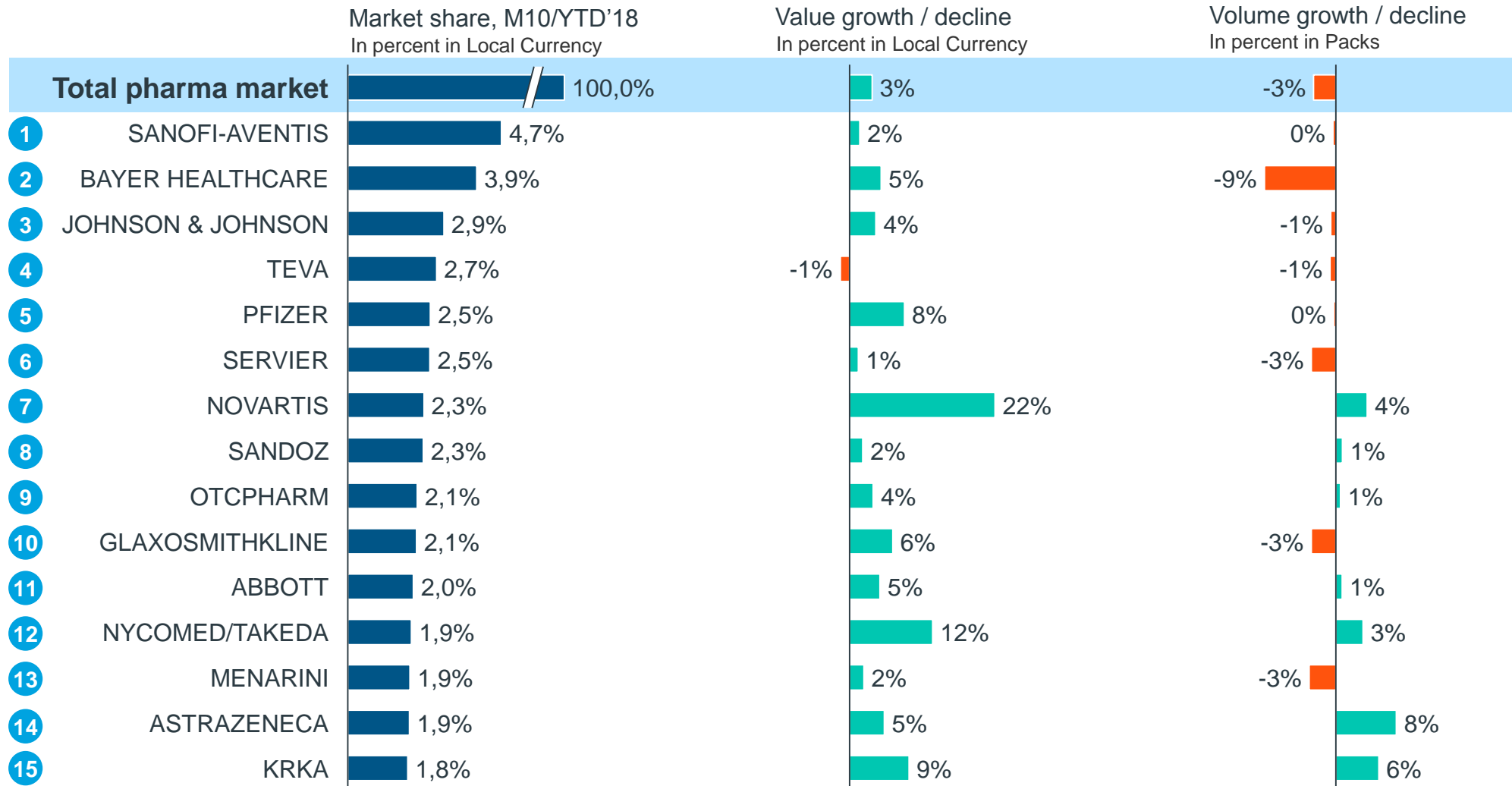
© 2018 IQVIA – Consumer Health Market Review Russia for Sanofi – 18 Dec 2018

Cough & Cold market definition: OTC categories 1A, 1B, 1C, 1F, 1V and 5F



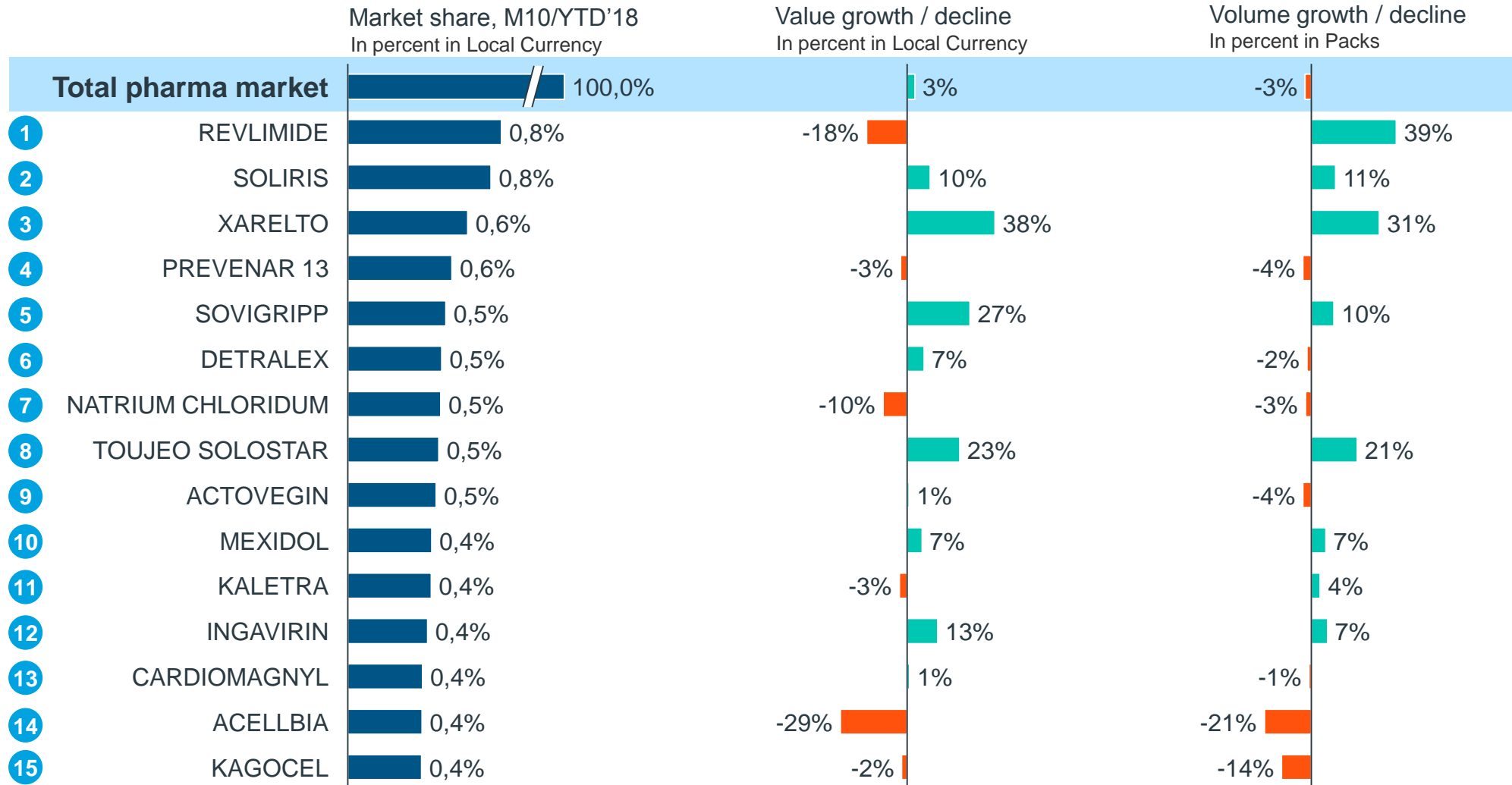


# TOP-15 corporations on Russian market, January-October 2018

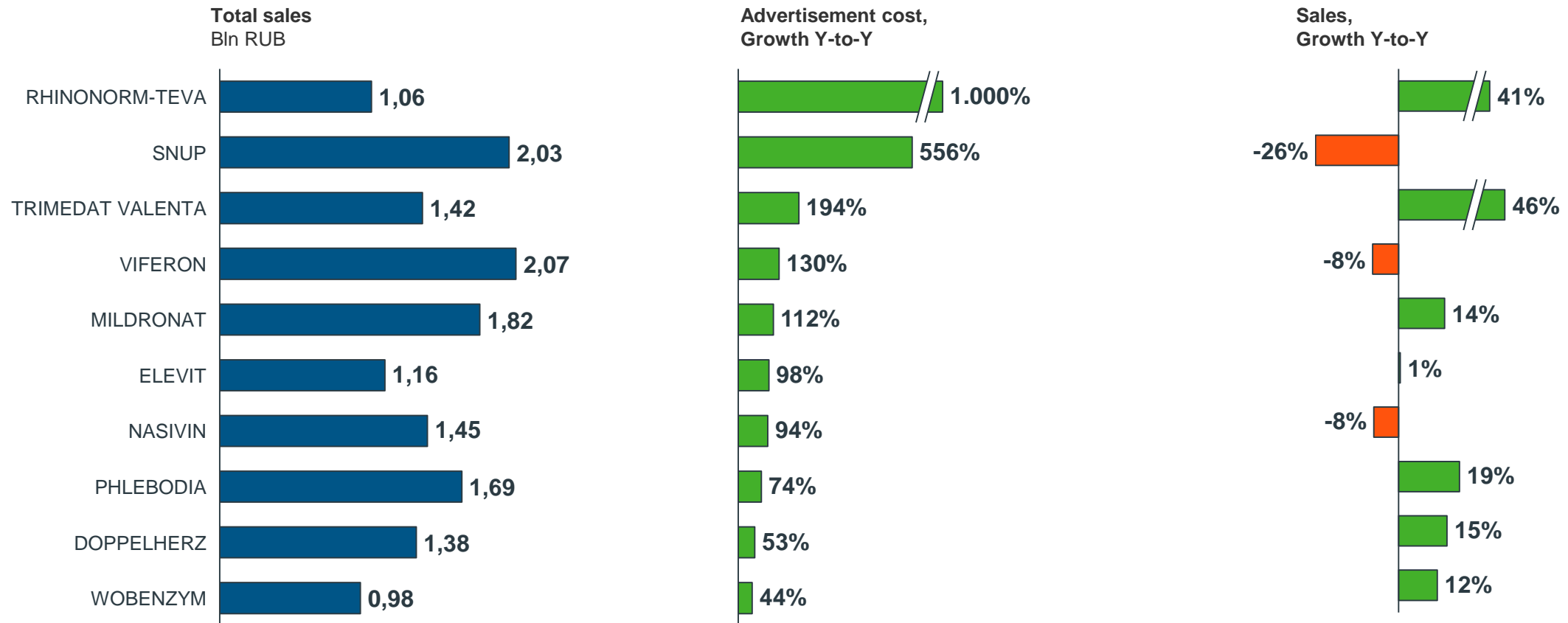




# TOP-15 brands on Russian market, January-October 2018

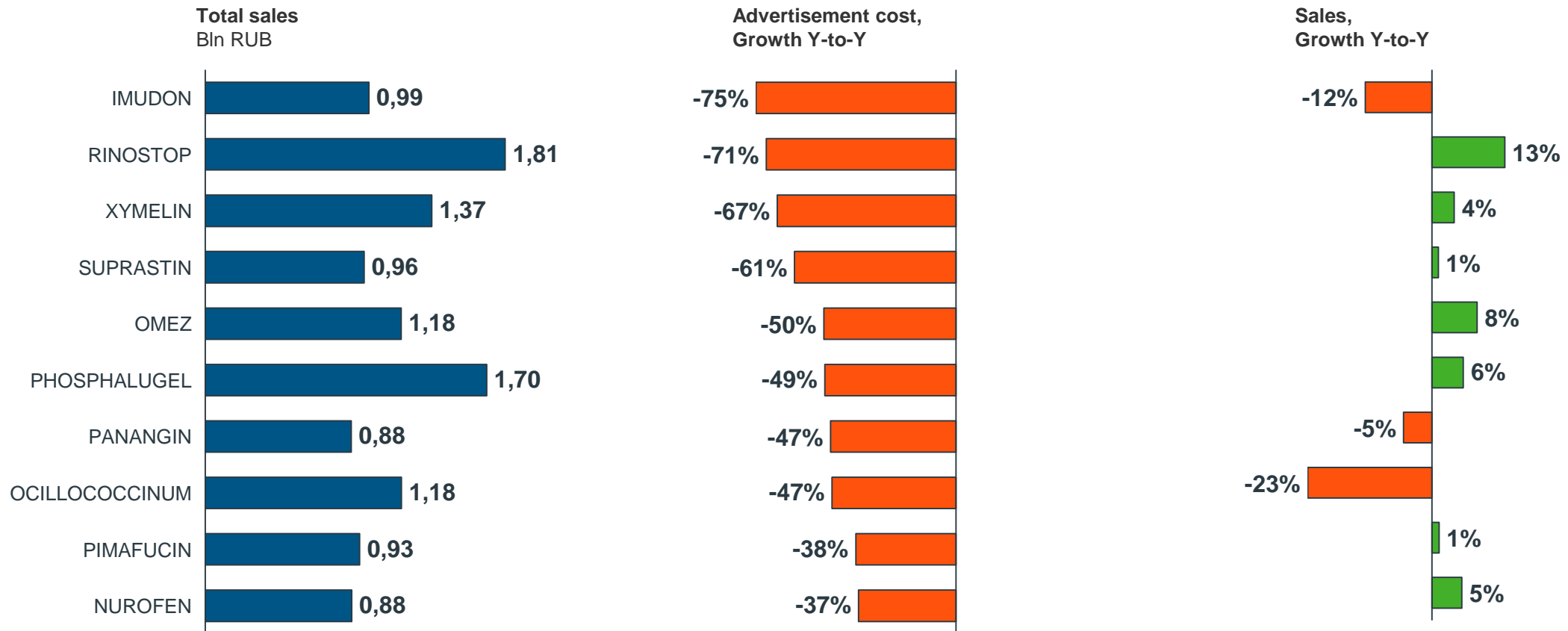


# TOP-10 products by growth in advertisement investments in January-October 2018



The rank is calculated among TOP-200 Brands 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-October 2018

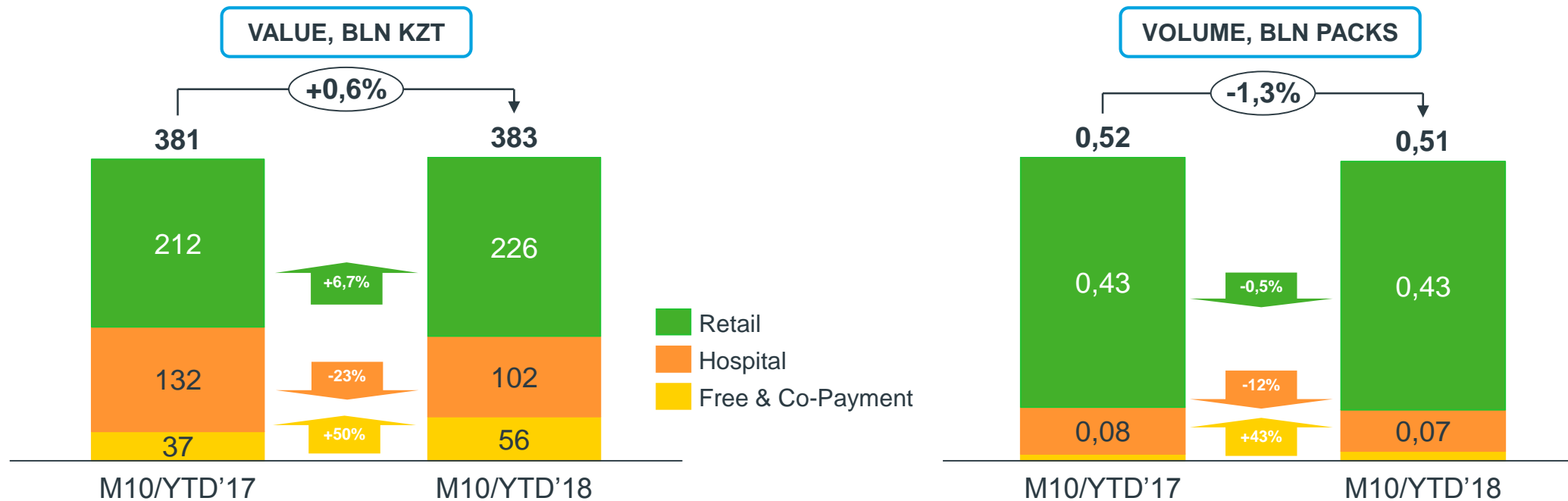


The rank is calculated among TOP-200 Brands by sales with advertising cost greater than 50 mln RUB  
 Source: IQVIA databases, Pharmatrend, Mediascope data, FIN Prices



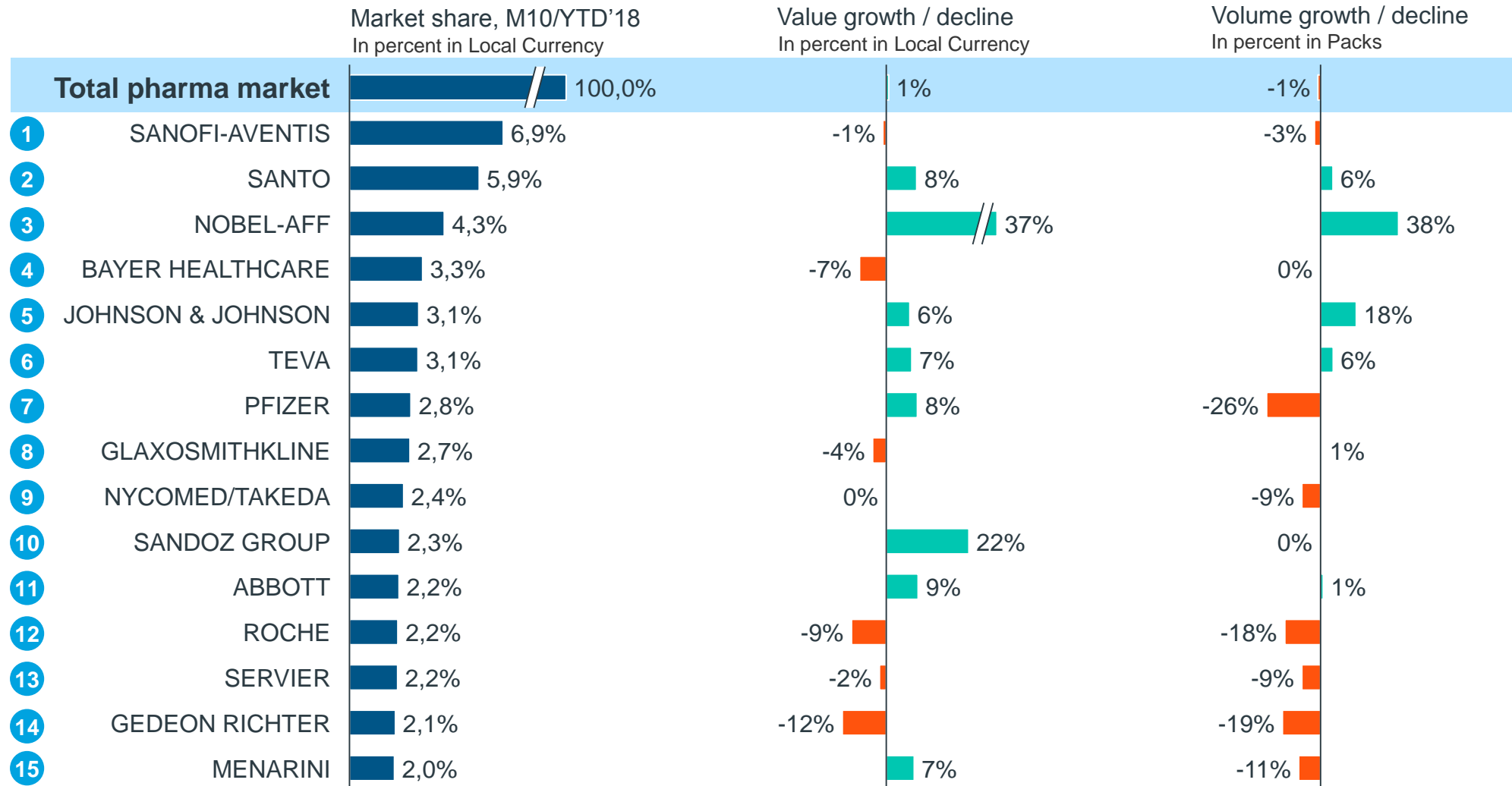
# Kazakhstan pharma market growth in January-October 2018

Market grew by 0,6% in value and decreased by 1,3% in volume



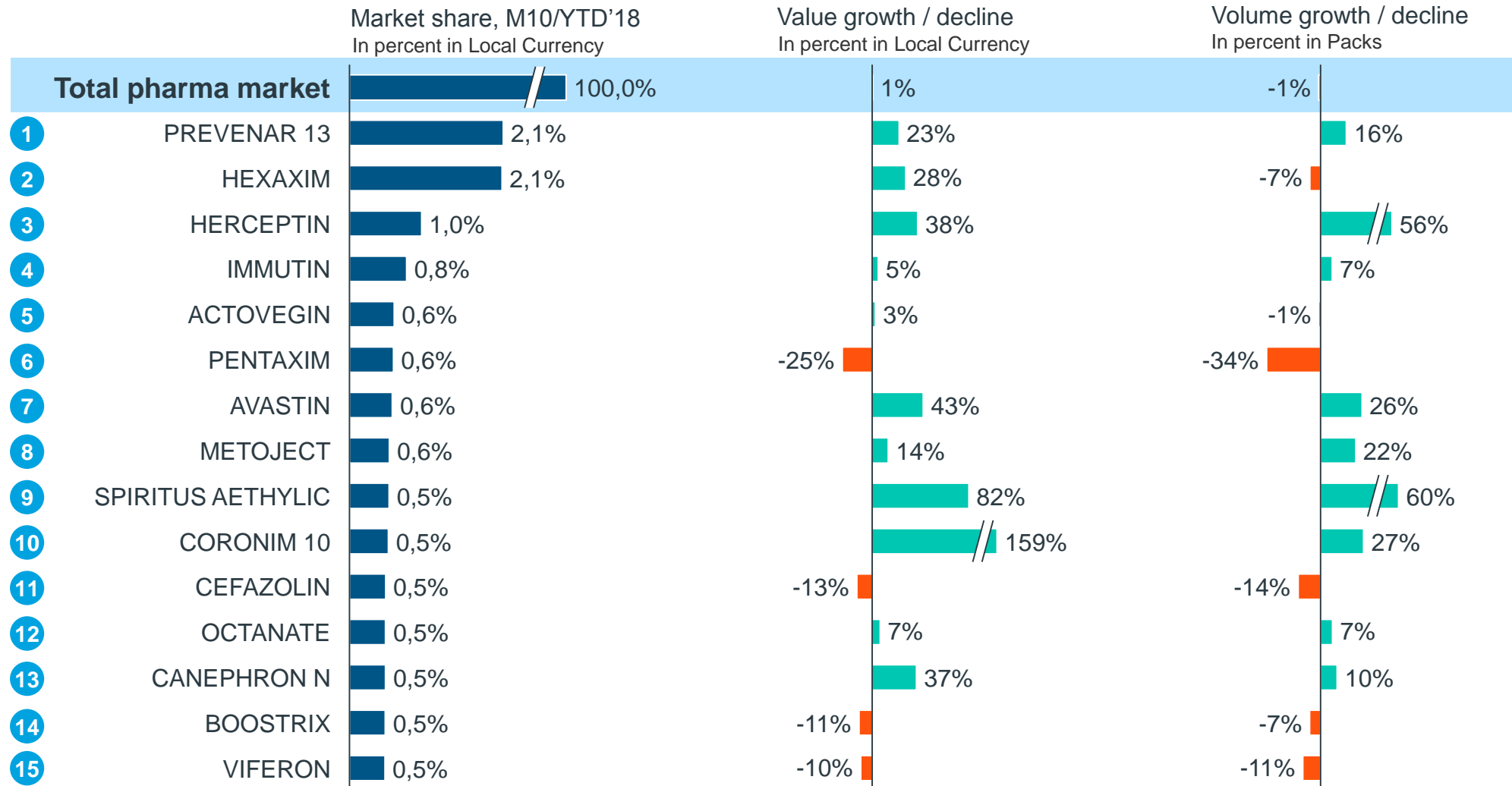
Indicator	KZT	USD	EUR	PACKS
Value M10/YTD 2018, Bln.	383	1,13	0,95	0,51
Growth M10/YTD,%	▲ 0,6%	▼ -4,1%	▼ -10%	▼ -1,3%

# TOP-15 corporations on Kazakhstan market, January-October 2018





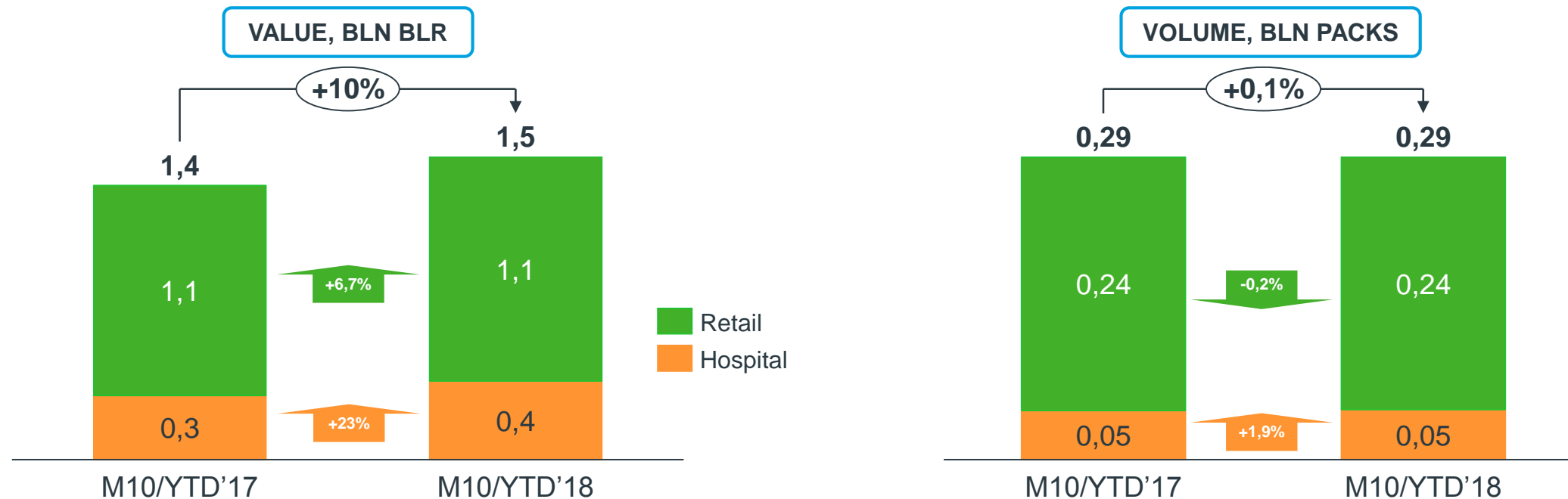
# TOP-15 brands on Kazakhstan market, January-October 2018





# Belarus pharma market growth in January-October 2018

Market grew by 10% in value and by 0,1% in volume

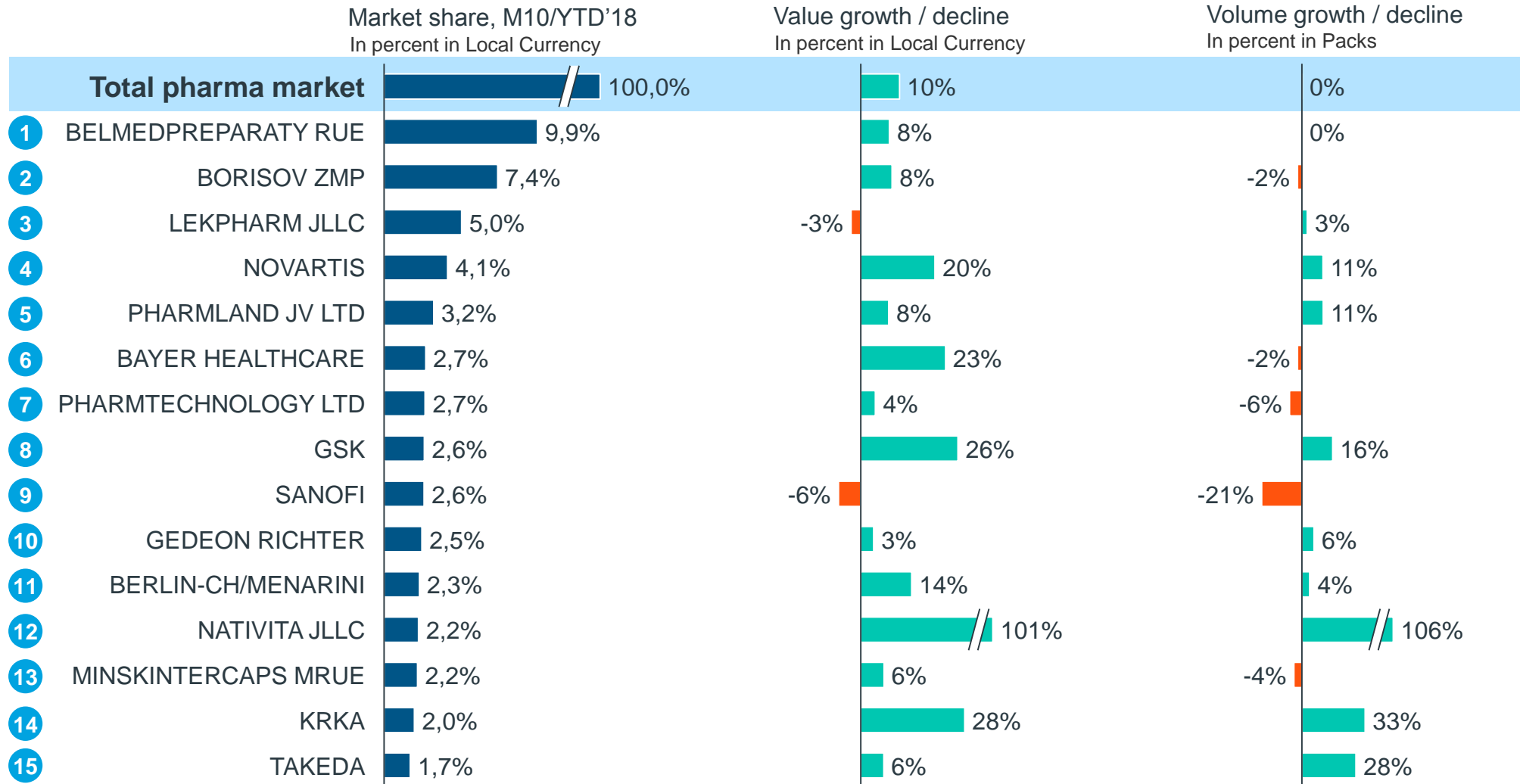


Indicator	BLR	USD	EUR	PACKS
Value M10/YTD 2018, Bln.	1,52	0,75	0,63	0,29
Growth M10/YTD,%	▲ 10%	▲ 4,9%	▼ -1,7%	▲ 0,1%



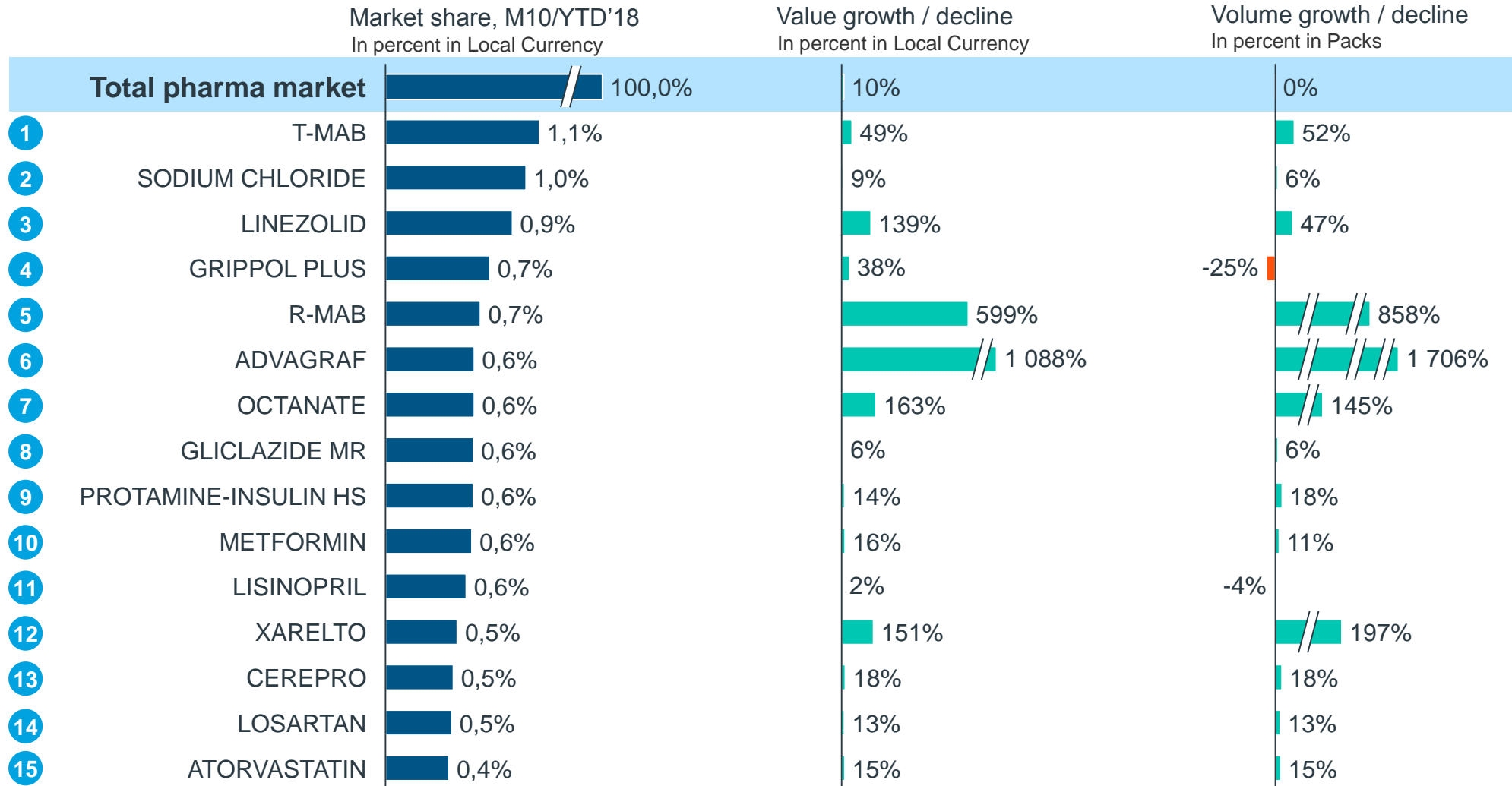


# TOP-15 corporations on Belarus market, January-October 2018





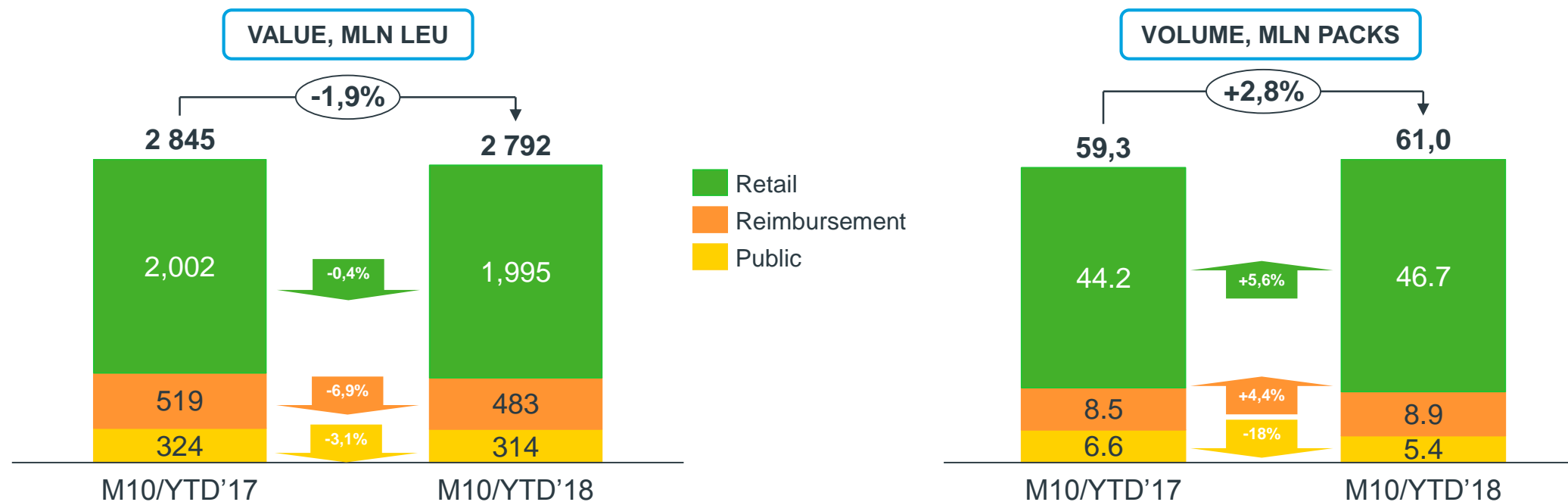
# TOP-15 brands on Belarus market, January-October 2018





# Moldova pharma market growth in January-October 2018

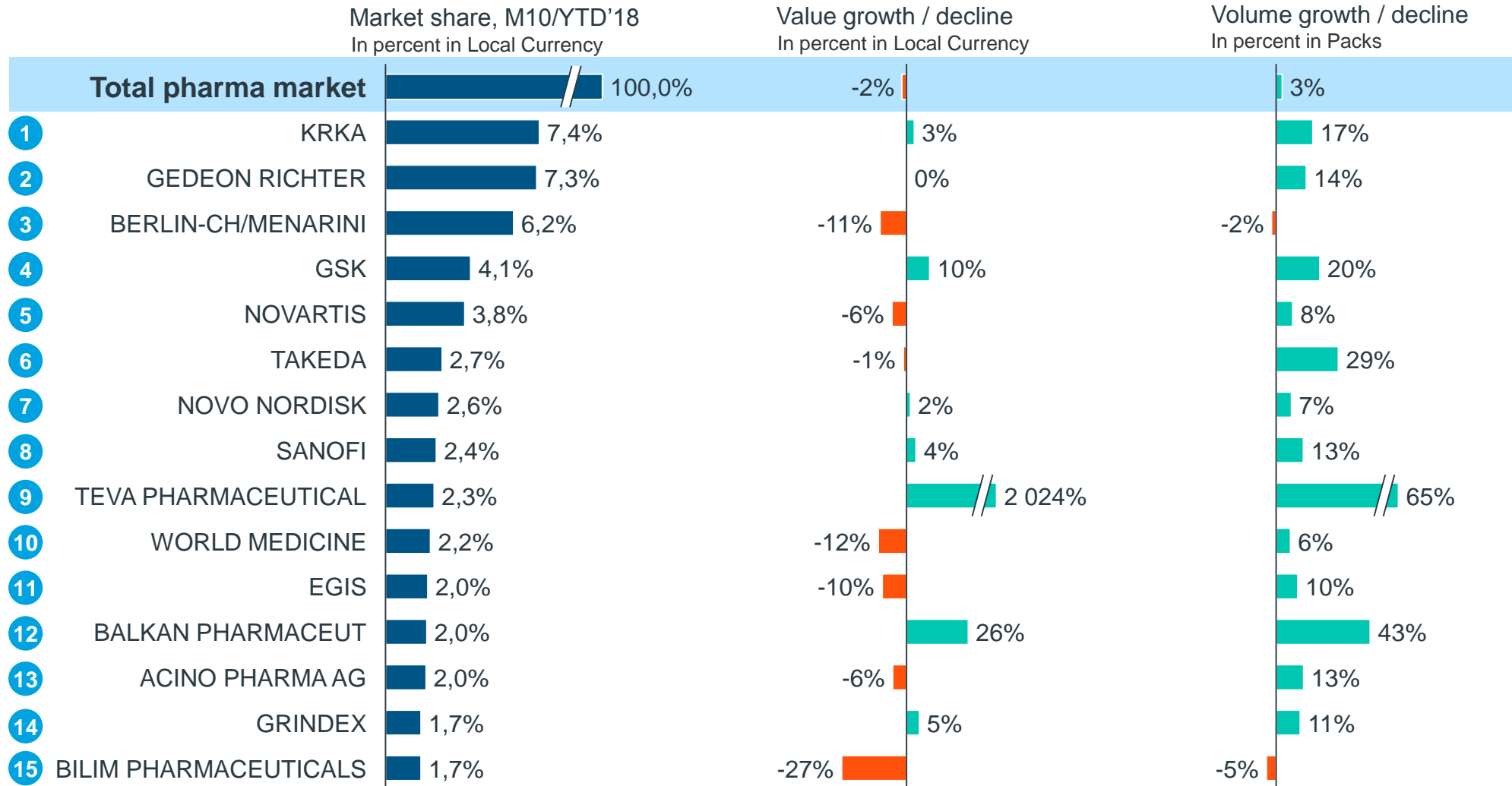
Market decreased by 1,9% in value and grew by 2,8% in volume



Indicator	LEU	USD	EUR	PACKS
Value M10/YTD 2018, Mln.	2 792	167	140	61
Growth M10/YTD,%	▼ -1,9%	▲ 10%	▲ 2,8%	▲ 2,8%

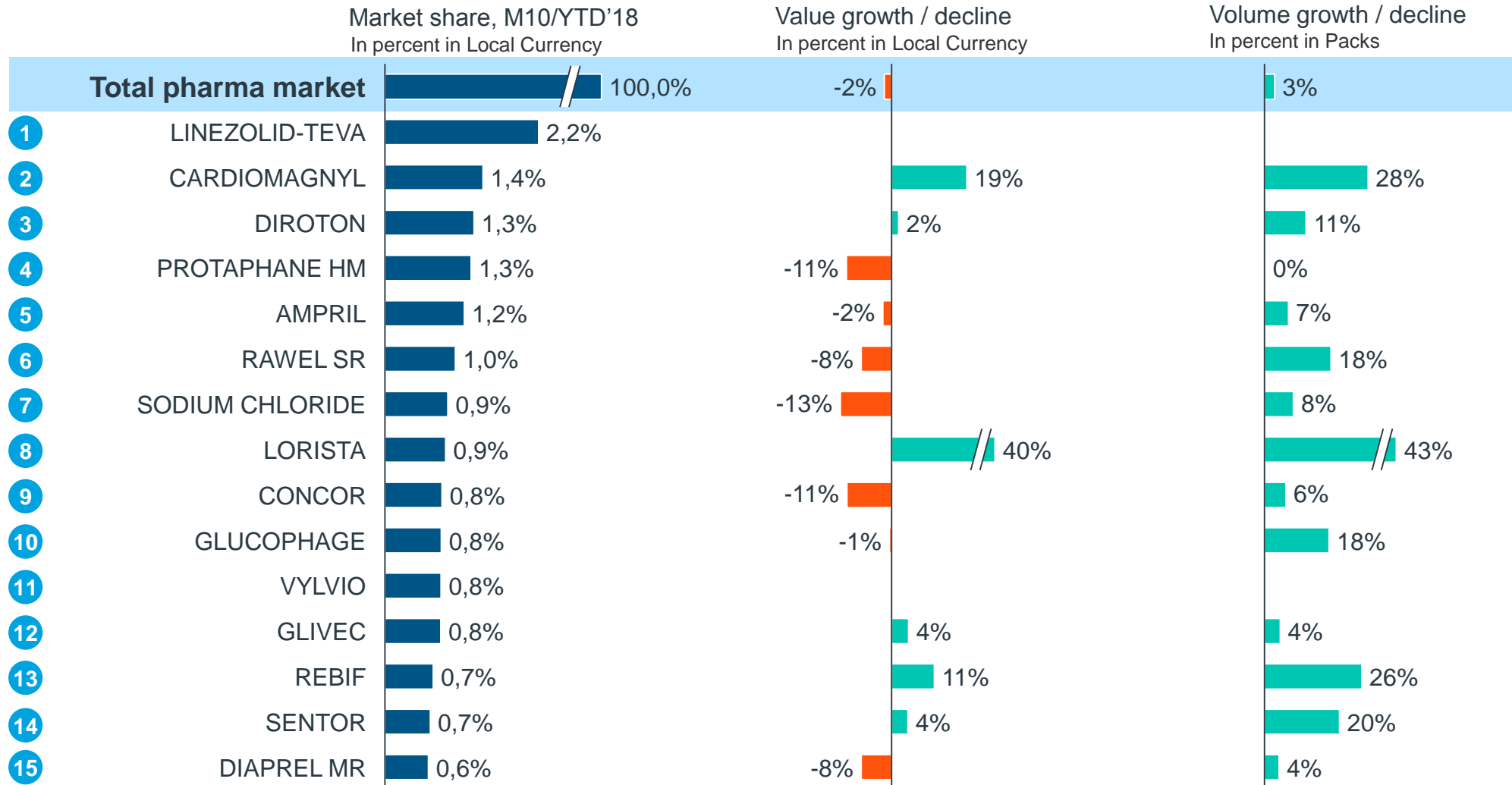


# TOP-15 corporations on Moldova market, January-October 2018





# TOP-15 brands on Moldova market, January-October 2018



# Please Contact Us for More Information



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