



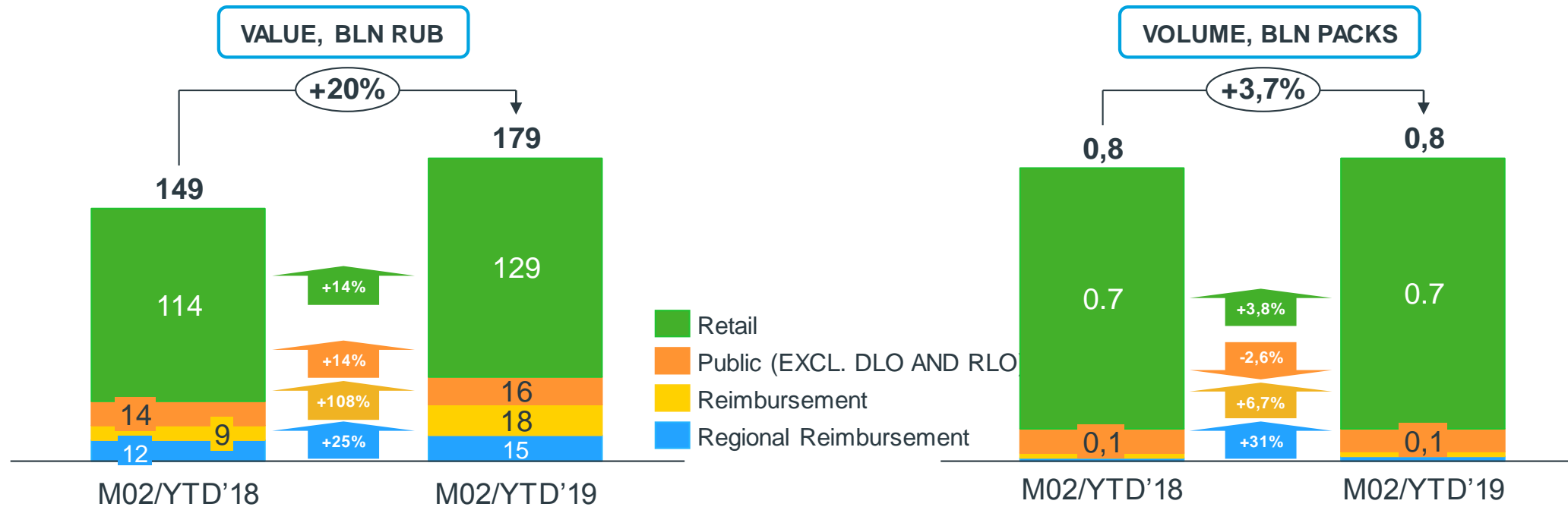
Facts from IQVIA

M02 2019



Russia pharma market growth in January-February 2019

Market grew by 20% in value and by 3,7% in volume

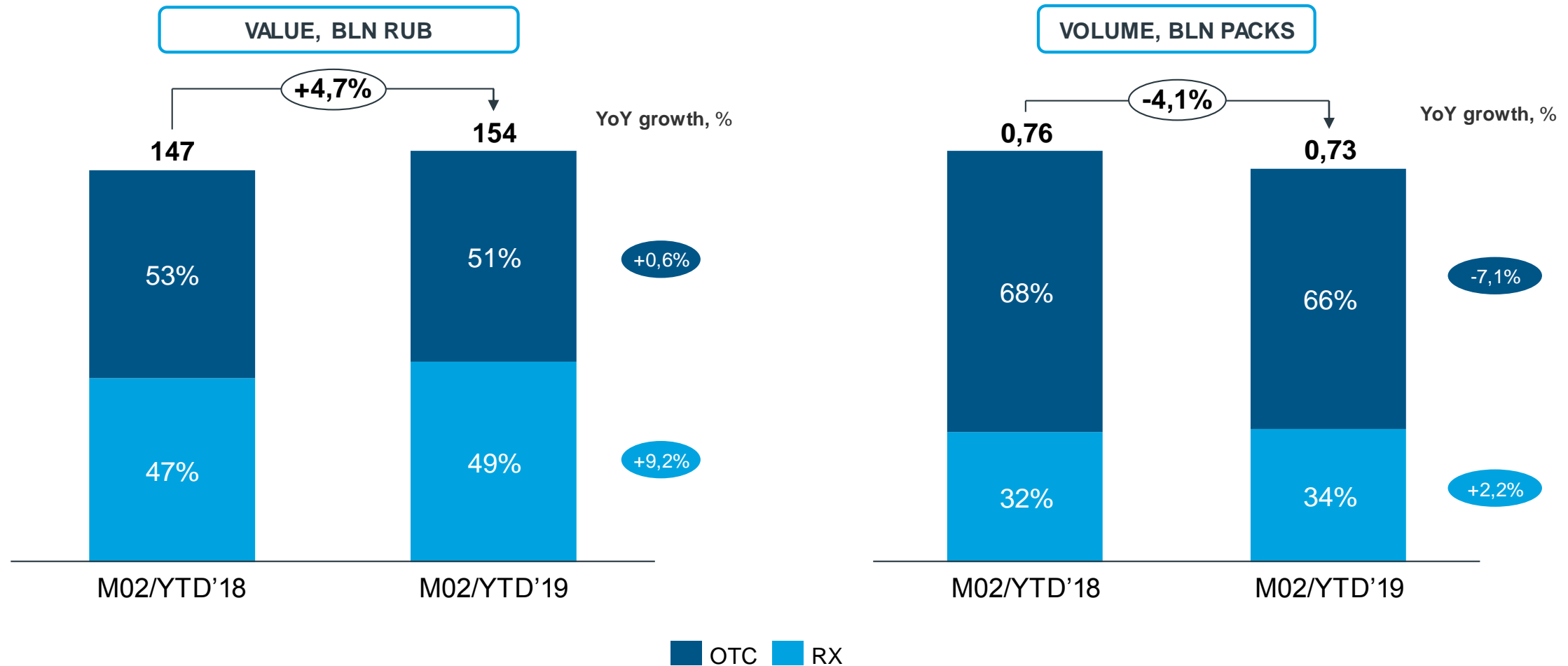


Indicator	RUB	USD	EUR	PACKS
Value M02/YTD'19, Bln.	179	2,7	2,4	0,8
Growth M02/YTD'19%	▲ 20%	▲ 2,5%	▲ 10%	▲ 3,7%



Russia pharma market growth in January-February 2019

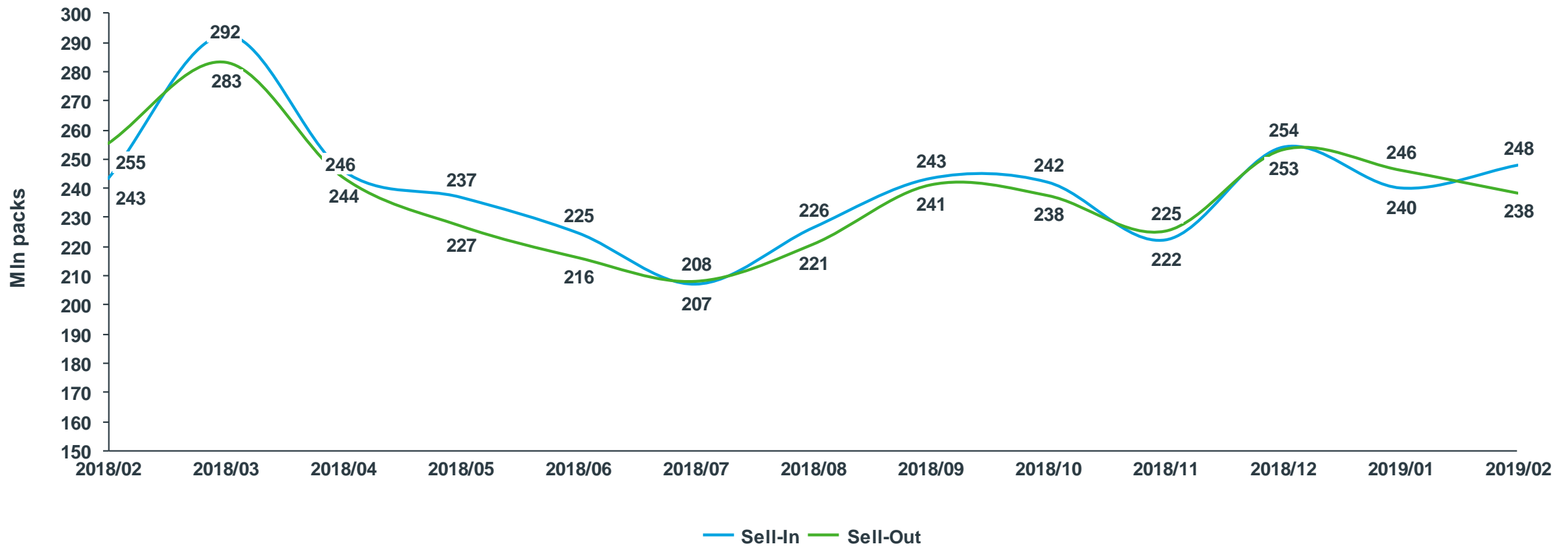
Retail Sell-Out: Market grew by 4,7% in value and decreased by 4,1% in volume





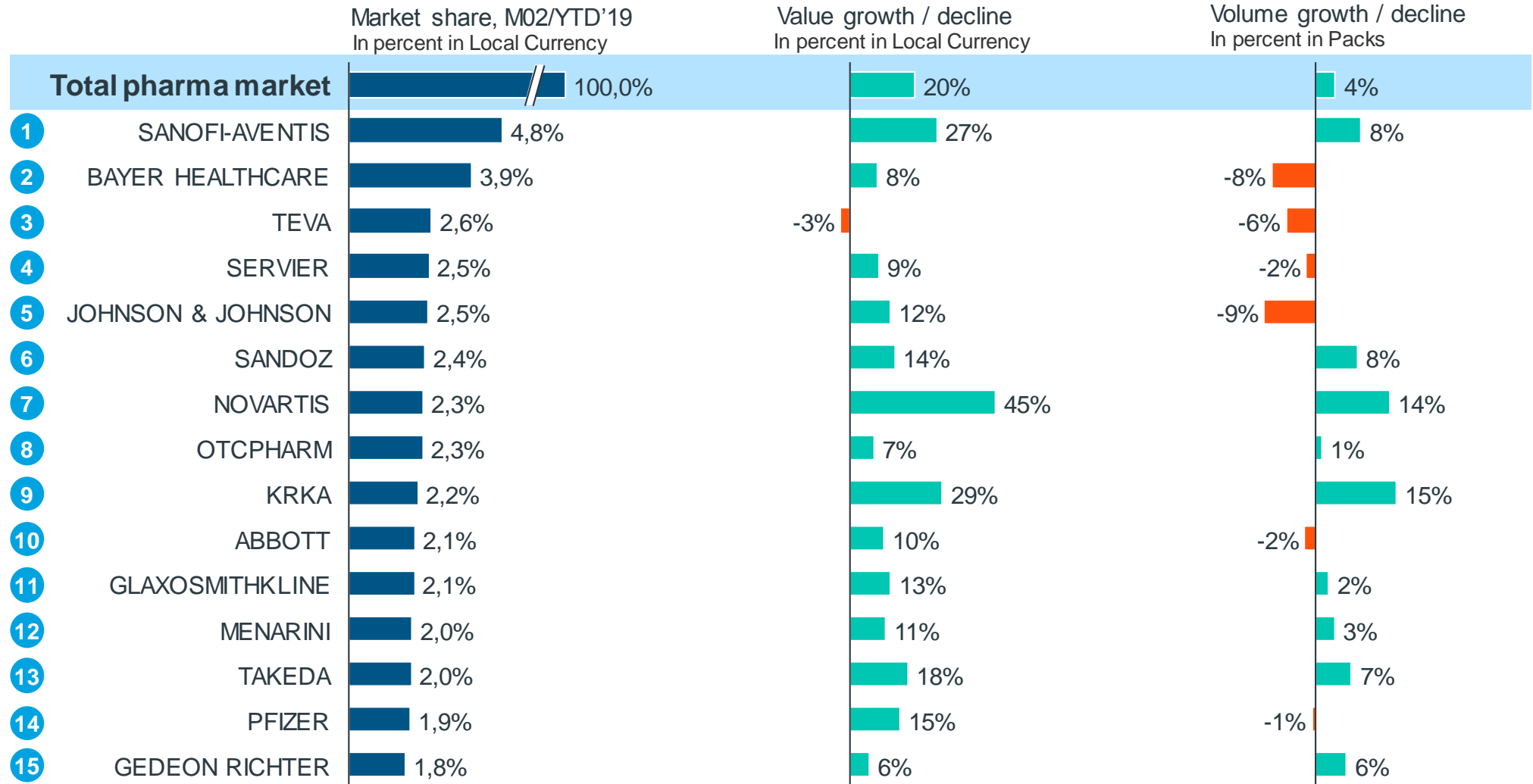
Sell-In vs Sell-Out, OTC registered drugs

Volume, mln packs





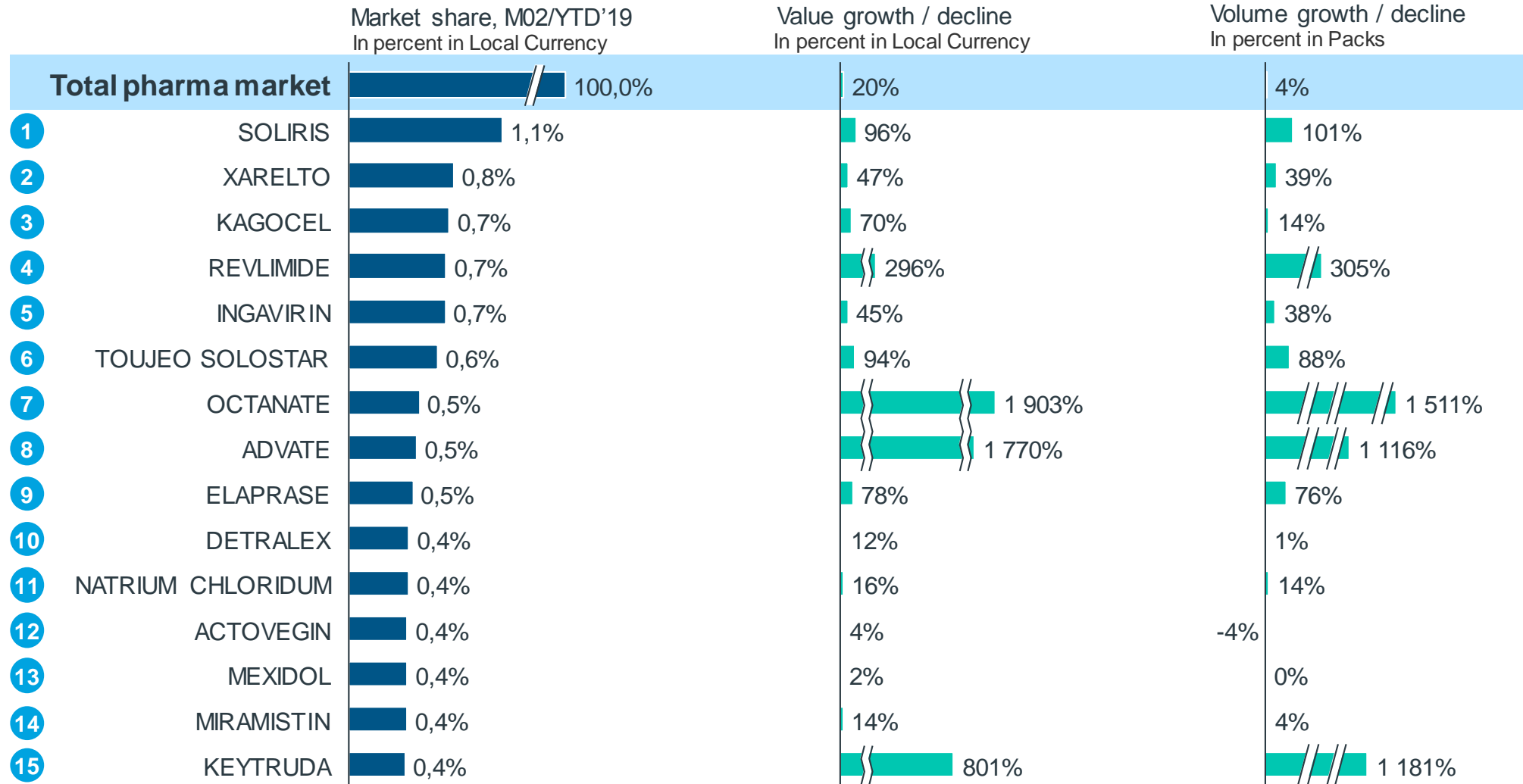
TOP-15 corporations on Russian market, January-February 2019



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



TOP-15 brands on Russian market, January-February 2019

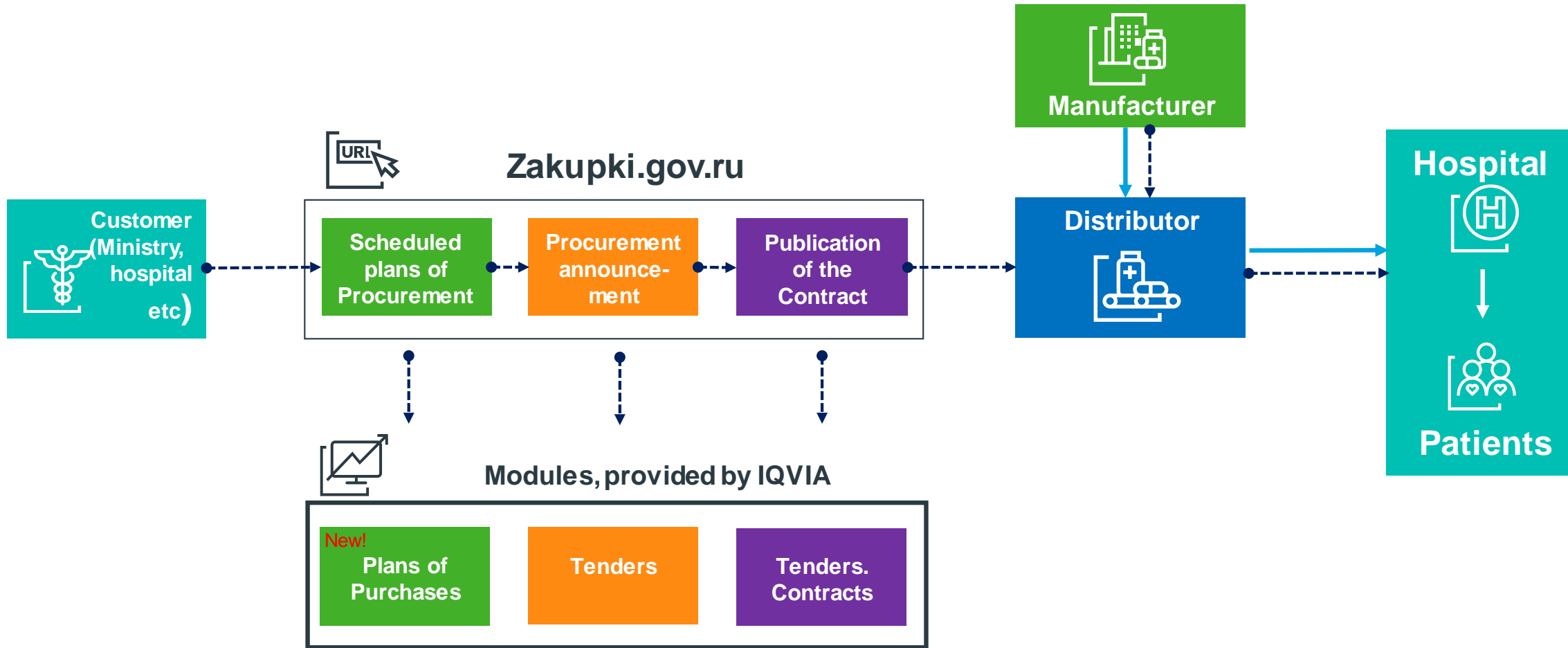


Source: IQVIA databases. Retail, Public, DLO, RLO (excluding food supplements and diagnostic agents), TRD Prices

Plans of purchases – new offering launched in Q2 2019



Customers must publish Plans of purchases, positions which are not included into Plans can not be bought



- - - - -> Documents
- Goods flow



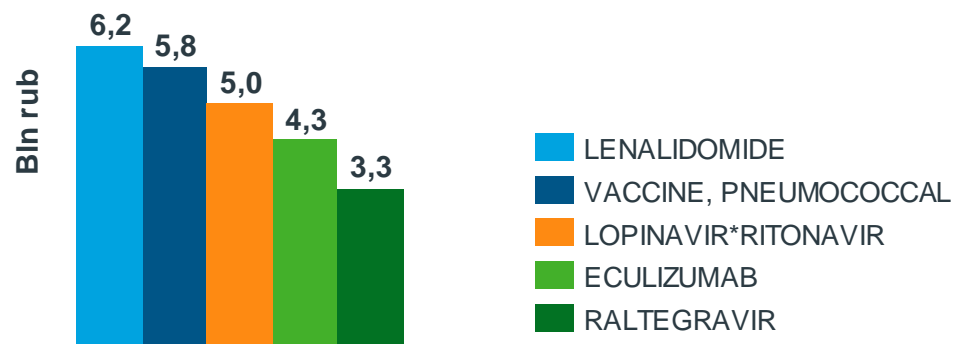
Plans of purchases, relevant facts

	Frequency	DAP	Granularity	Panel/Universe	Back Data
Key indicators	Weekly	2 days	National Regional Municipal	www.zakupki.gov.ru	2018
Market Definition	Published Plans of Drug Procurement. The data is based on information on published tenders at www.zakupki.gov.ru				
Methodology	Without extrapolation. Volumes are in primary published units. Classification by Customers, molecules and release forms.				
Granularity	National level + 83 regions + Account Level data				
Delivery tools	<ul style="list-style-type: none">▪ Online IQVIA Tool▪ Customized E-Mail newsletters				

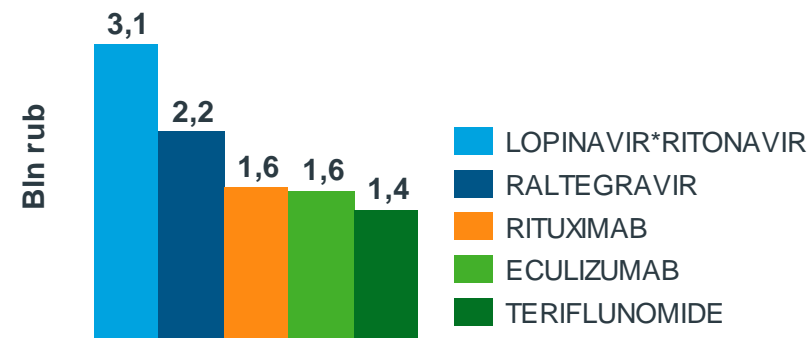
IQVIA is launching Plans of Purchases offering that could be applied for immediate monitoring and medium-term planning



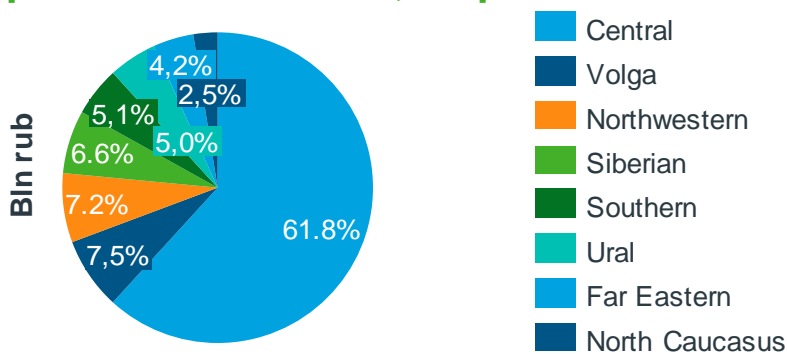
TOP5 molecules to be purchased in 2019 as per current versions of plans



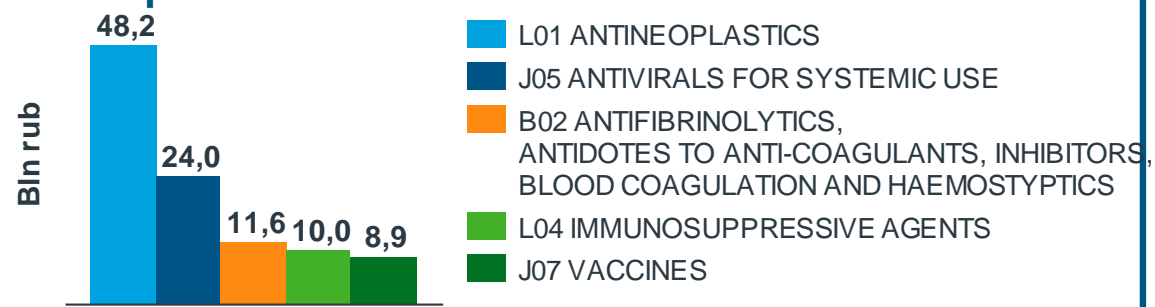
TOP5 molecules by volumes to be announced in 2Q'19 as per current versions of plans



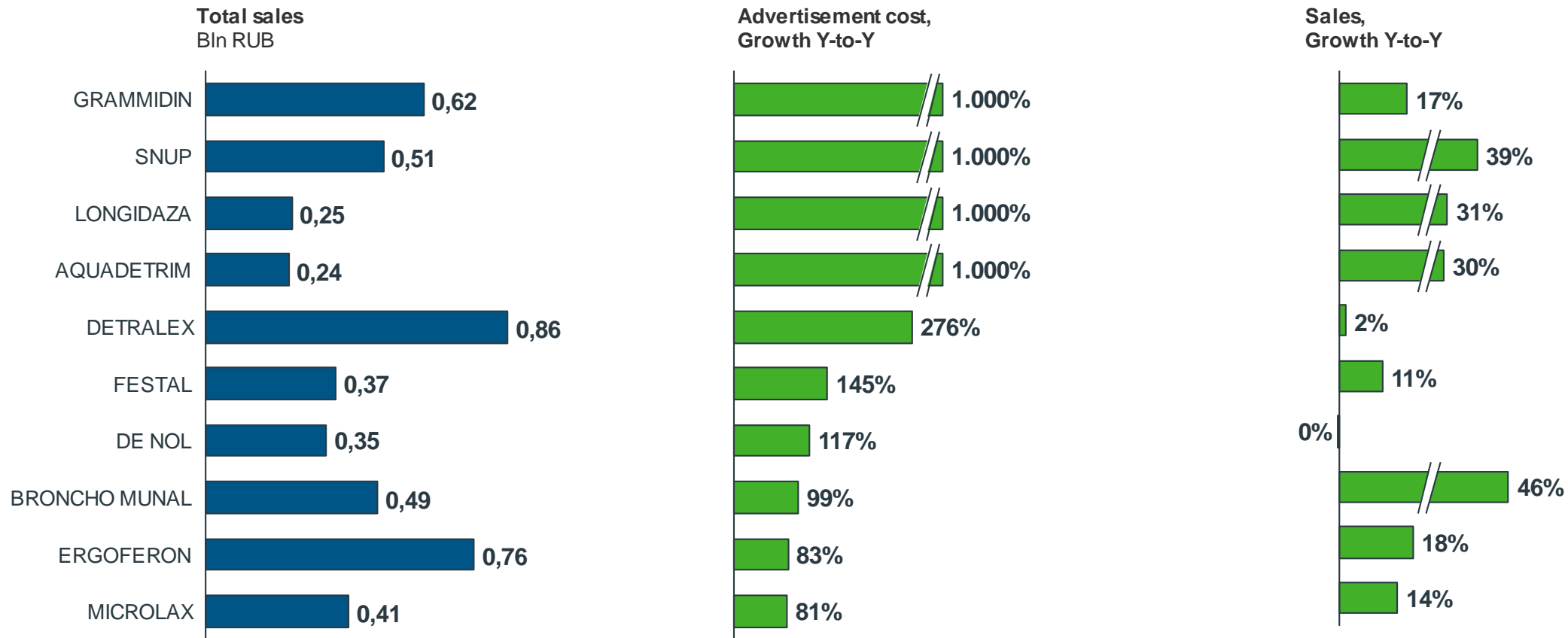
Rating of Federal Districts by published plans of purchases for 2019, as per current version of plans



TOP5 EphMRA-2 categoris by volumes to be announced in 2019 as per current versions of plans

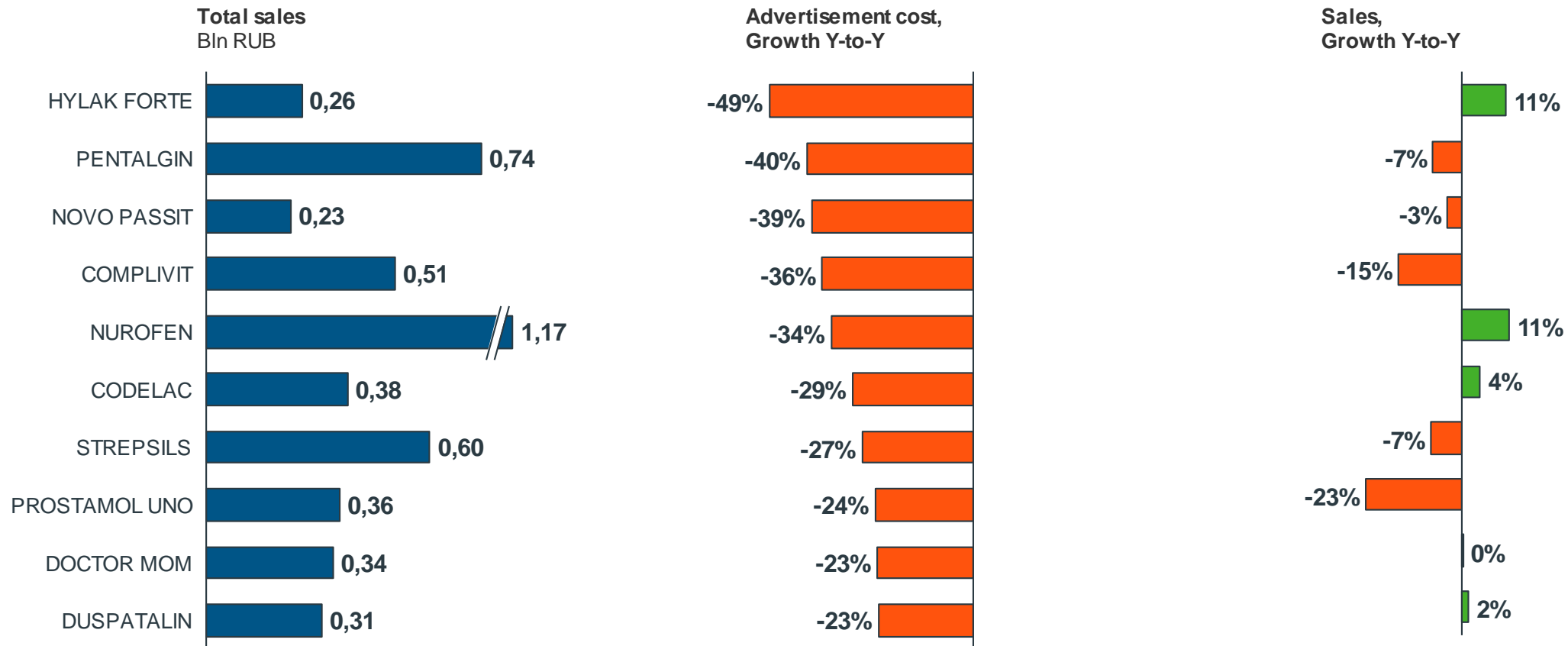


TOP-10 products by growth in advertisement investments in January-February 2019



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-February 2019

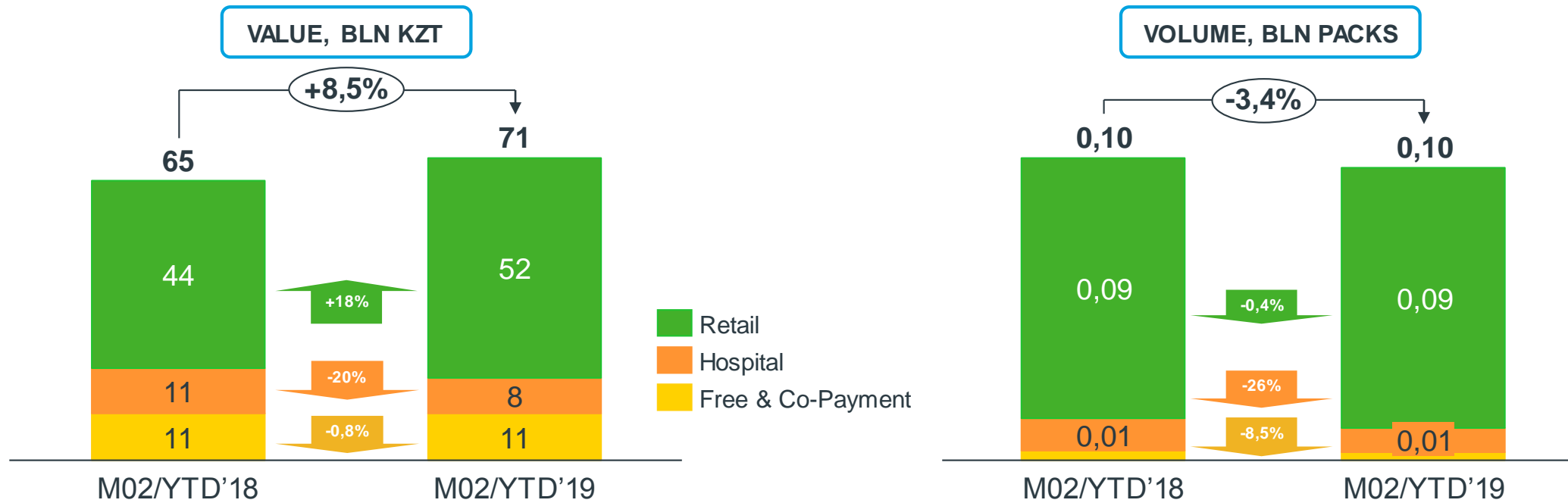


The rank is calculated among TOP-200 Brands by sales with advertising cost greater than 50 mln RUB
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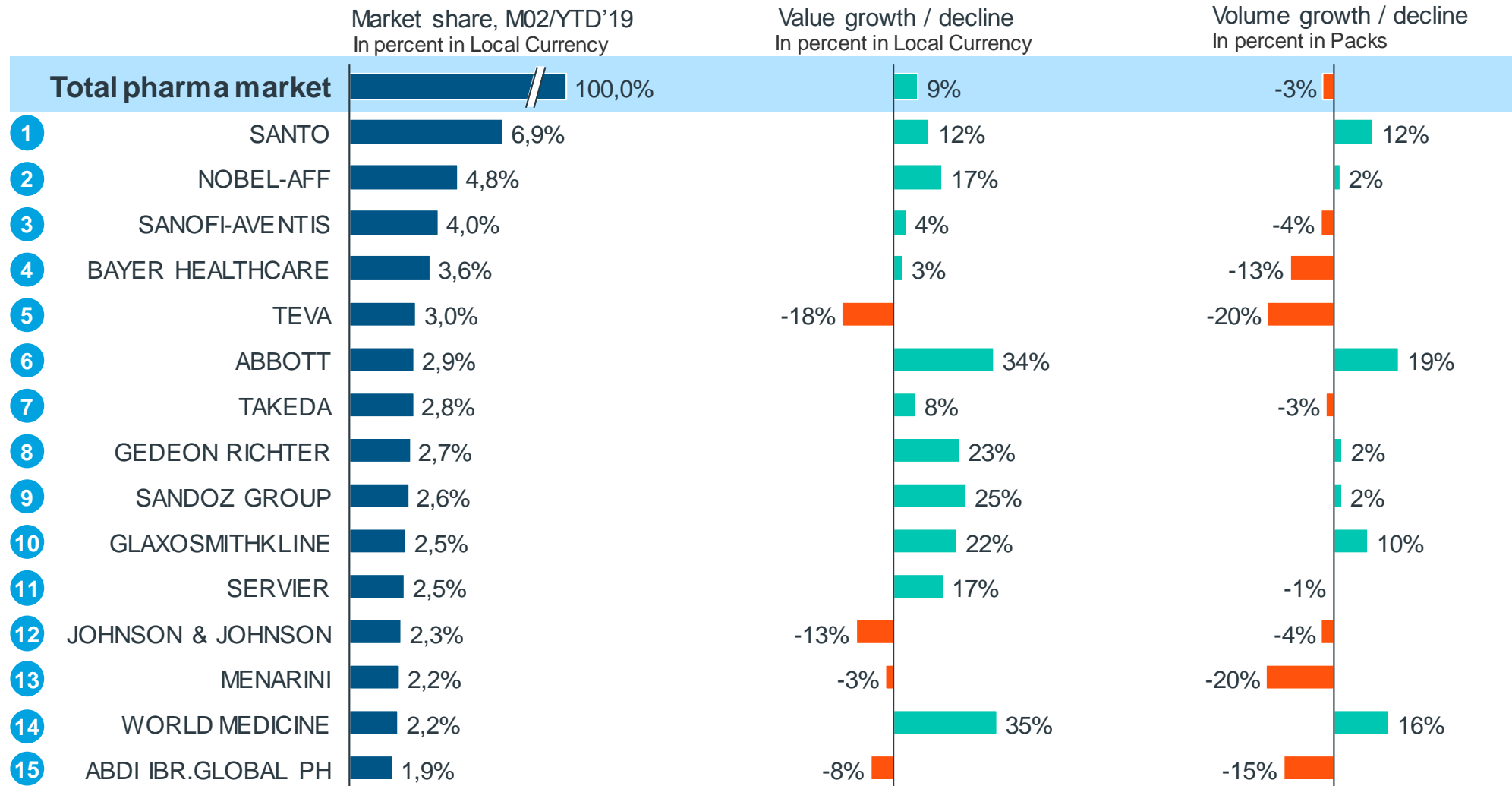
Kazakhstan pharma market growth in January-February 2019

Market grew by 8,5% in value and decreased by 3,4% in volume



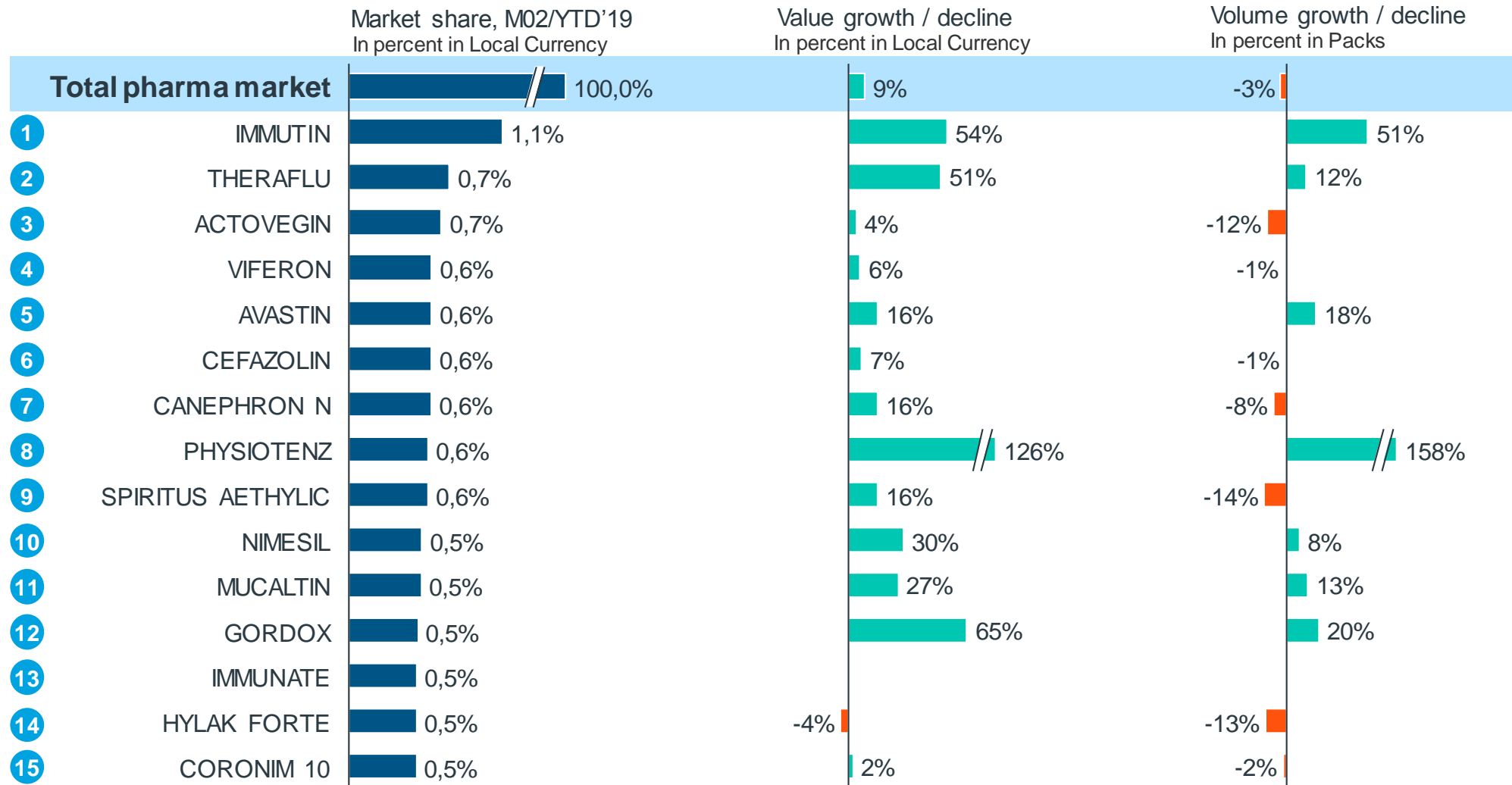
Indicator	KZT	USD	EUR	PACKS
Value M02/YTD'19, Bln.	71	0,19	0,16	0,10
Growth M02/YTD'19%	▲ 8,5%	▼ -7,3%	▲ 0,3%	▼ -3,4%

TOP-15 corporations on Kazakhstan market, January-February 2019





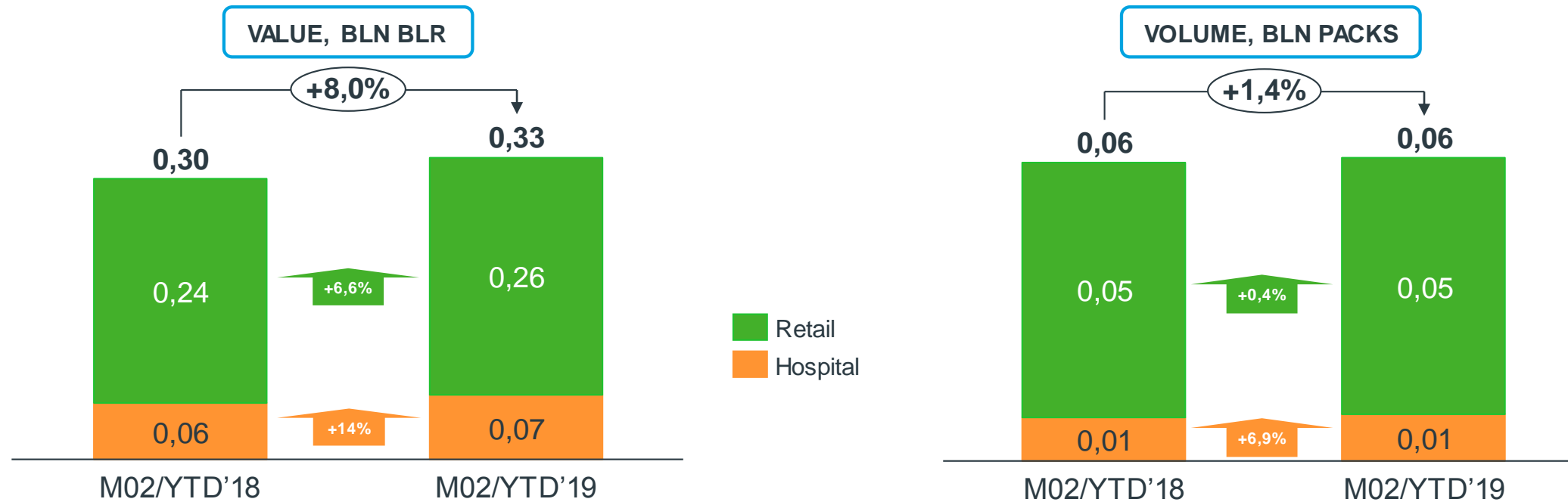
TOP-15 brands on Kazakhstan market, January-February 2019





Belarus pharma market growth in January-February 2019

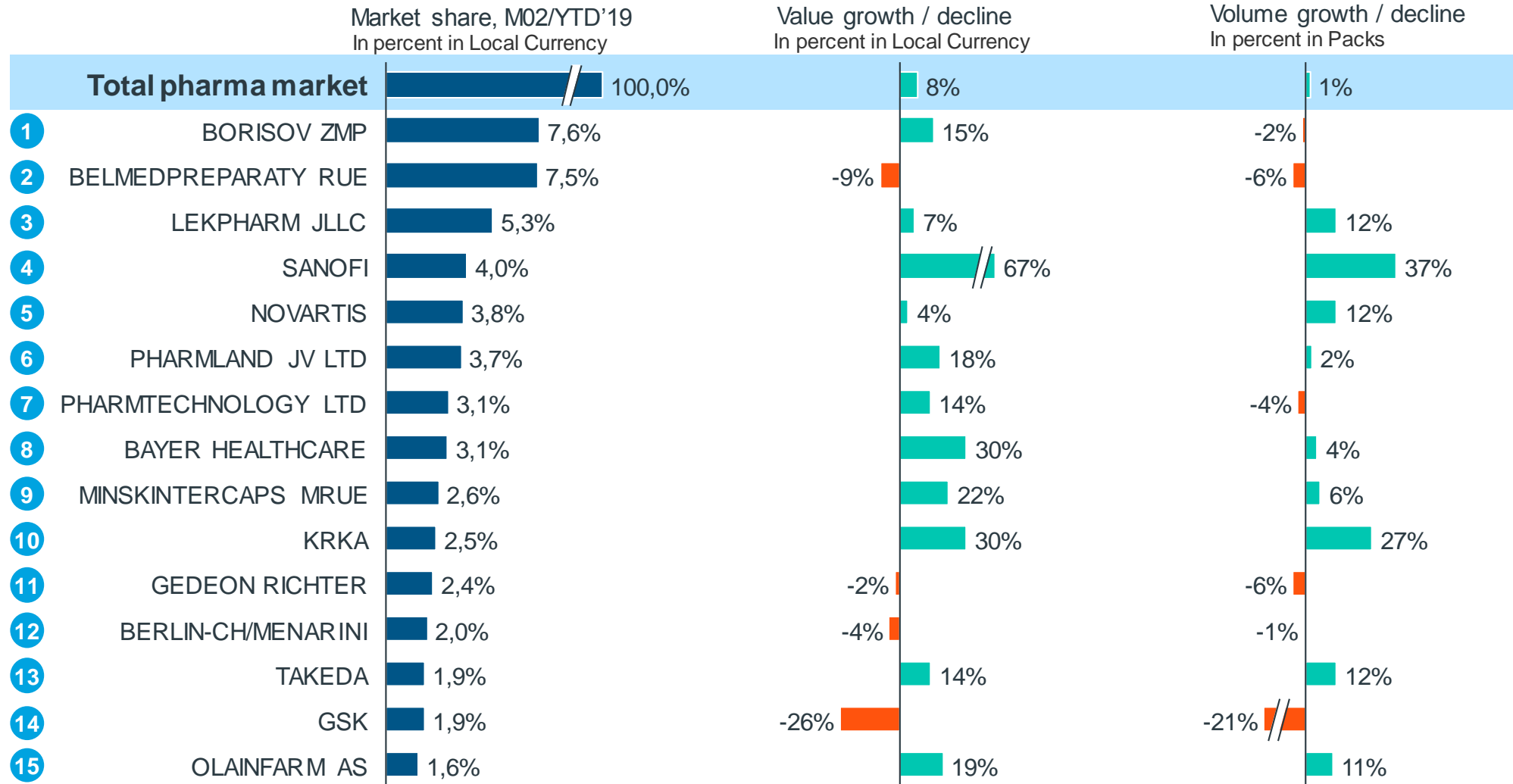
Market grew by 8% in value and by 1,4% in volume



Indicator	BLR	USD	EUR	PACKS
Value M02/YTD'19, Bln.	0,33	0,15	0,13	0,06
Growth M02/YTD'19%	▲ 8,0%	▼ -0,8%	▲ 6,8%	▲ 1,4%

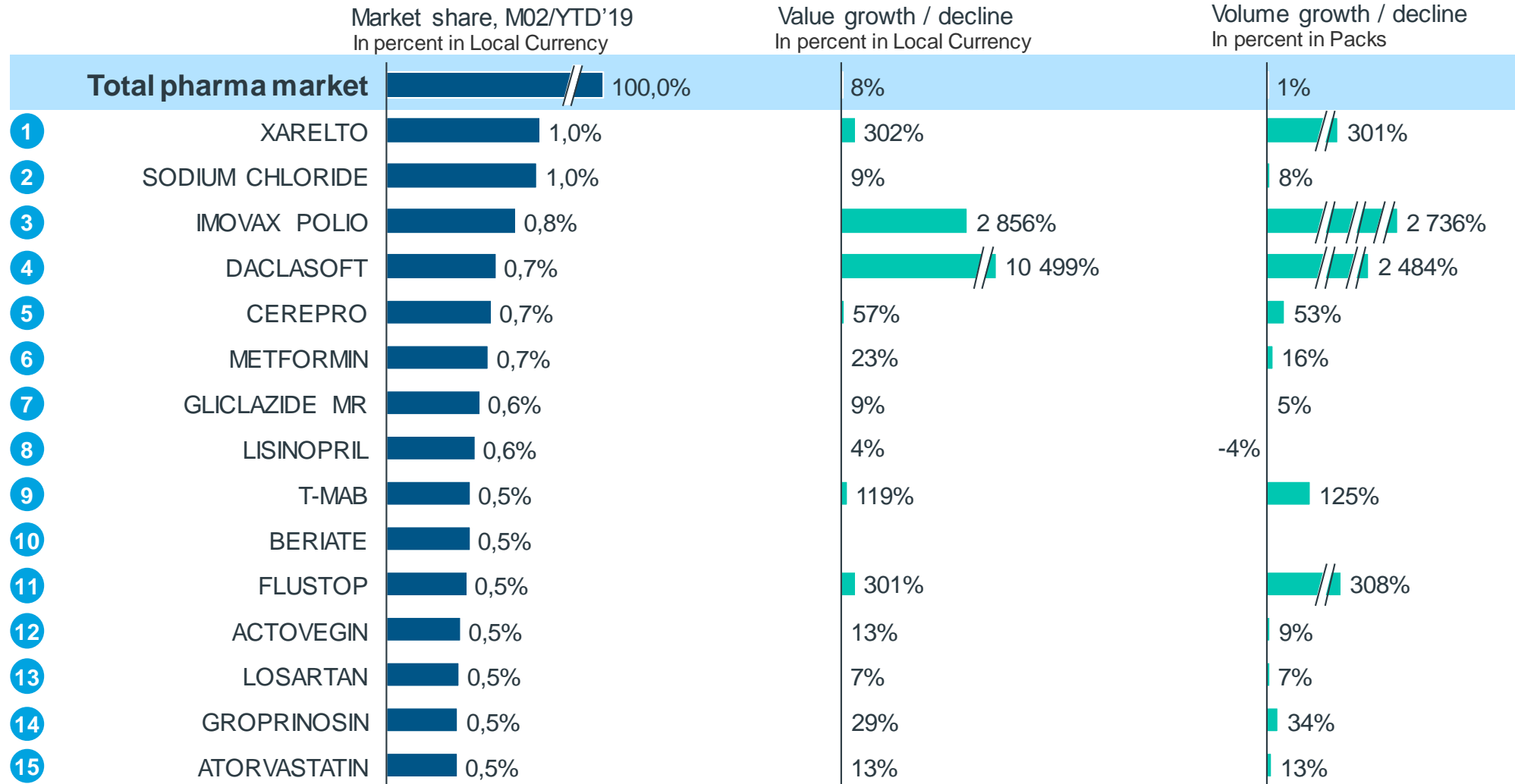


TOP-15 corporations on Belarus market, January-February 2019





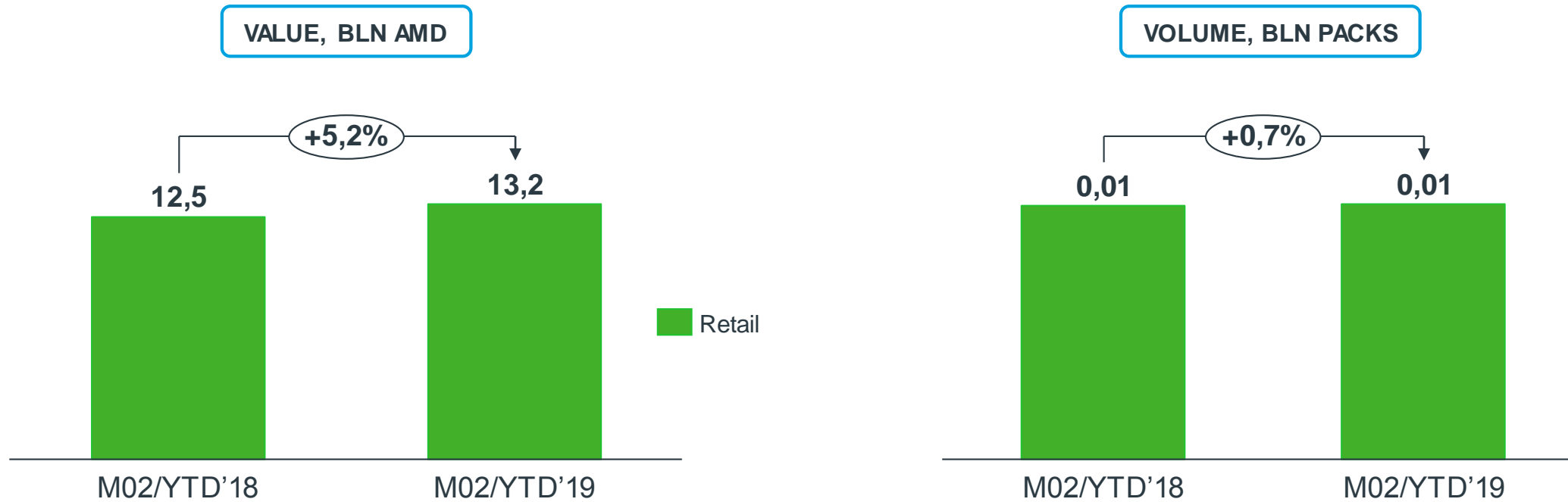
TOP-15 brands on Belarus market, January-February 2019





Armenia pharma market growth in January-February 2019

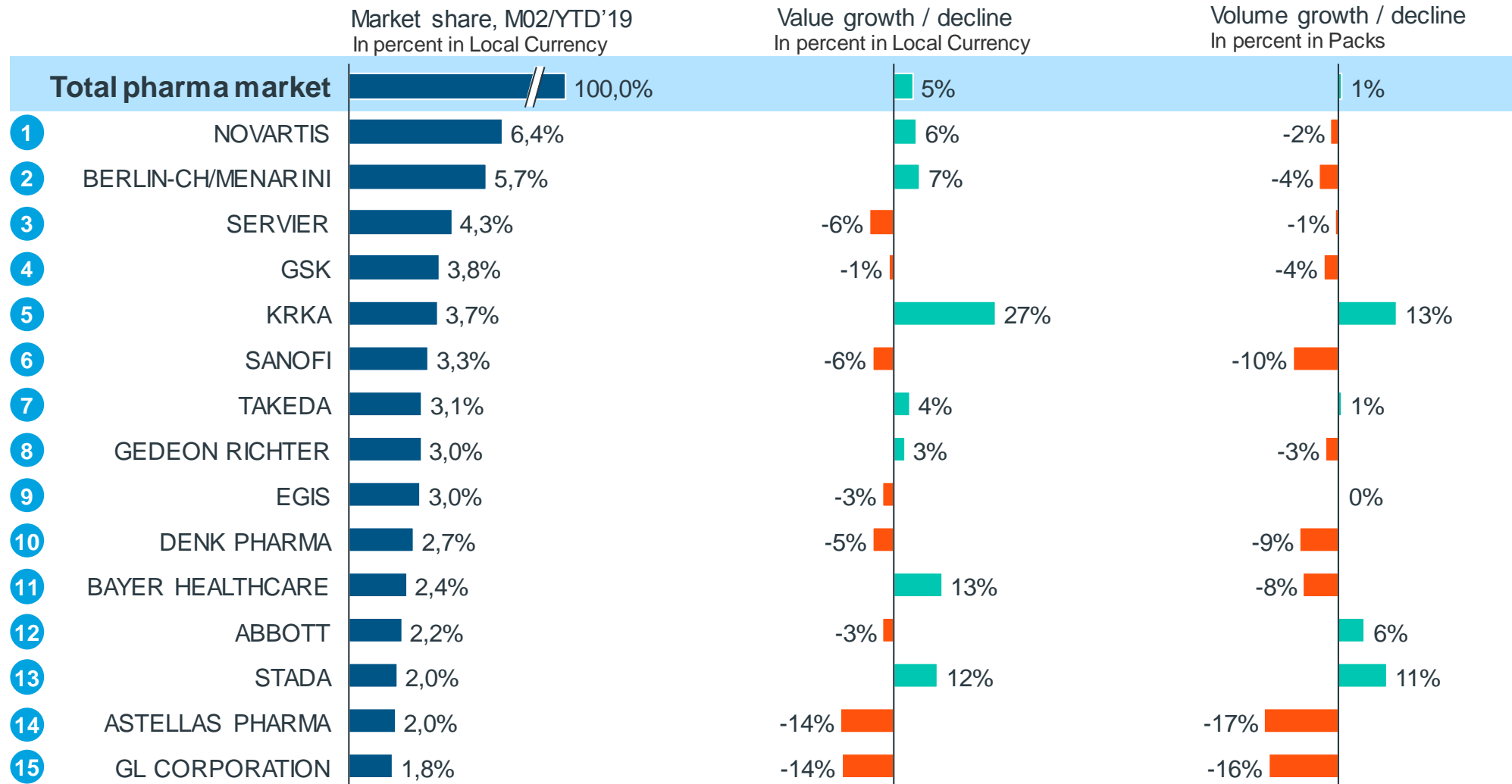
Market grew by 5,2% in value and by 0,7% in volume



Indicator	AMD	USD	EUR	PACKS
Value M02/YTD'19, Bln.	13,2	0,03	0,02	0,01
Growth M02/YTD'19%	▲ 5,2%	▲ 4,2%	▲ 12%	▲ 0,7%

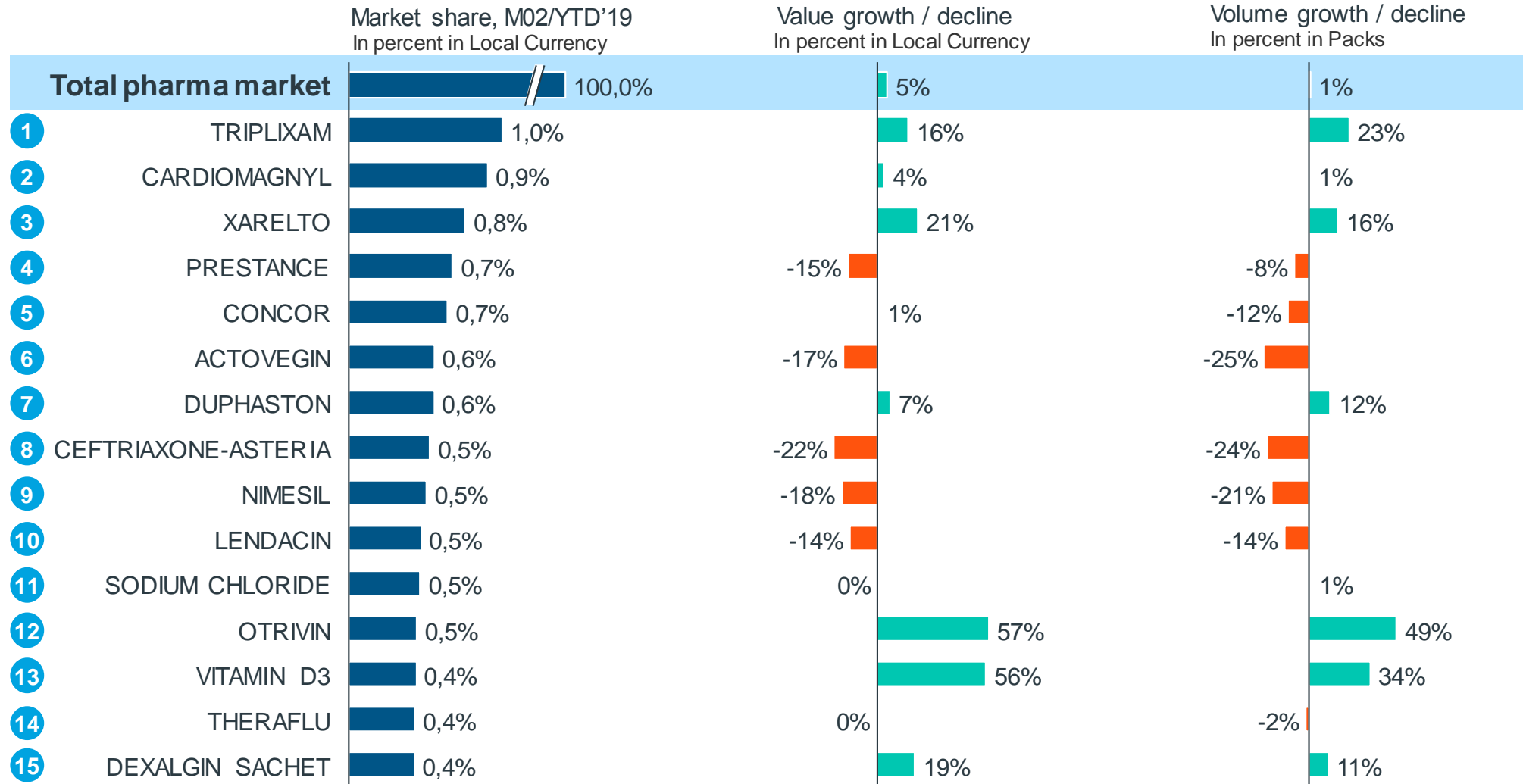


TOP-15 corporations on Armenia market, January-February 2019





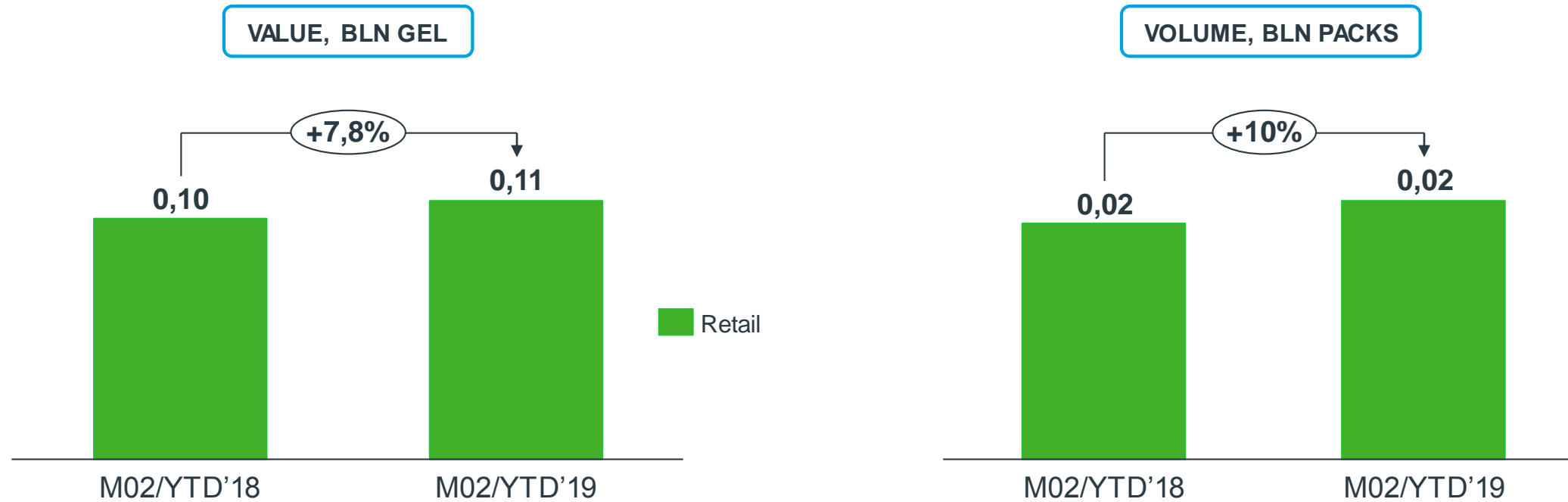
TOP-15 brands on Armenia market, January-February 2019





Georgia pharma market growth in January-February 2019

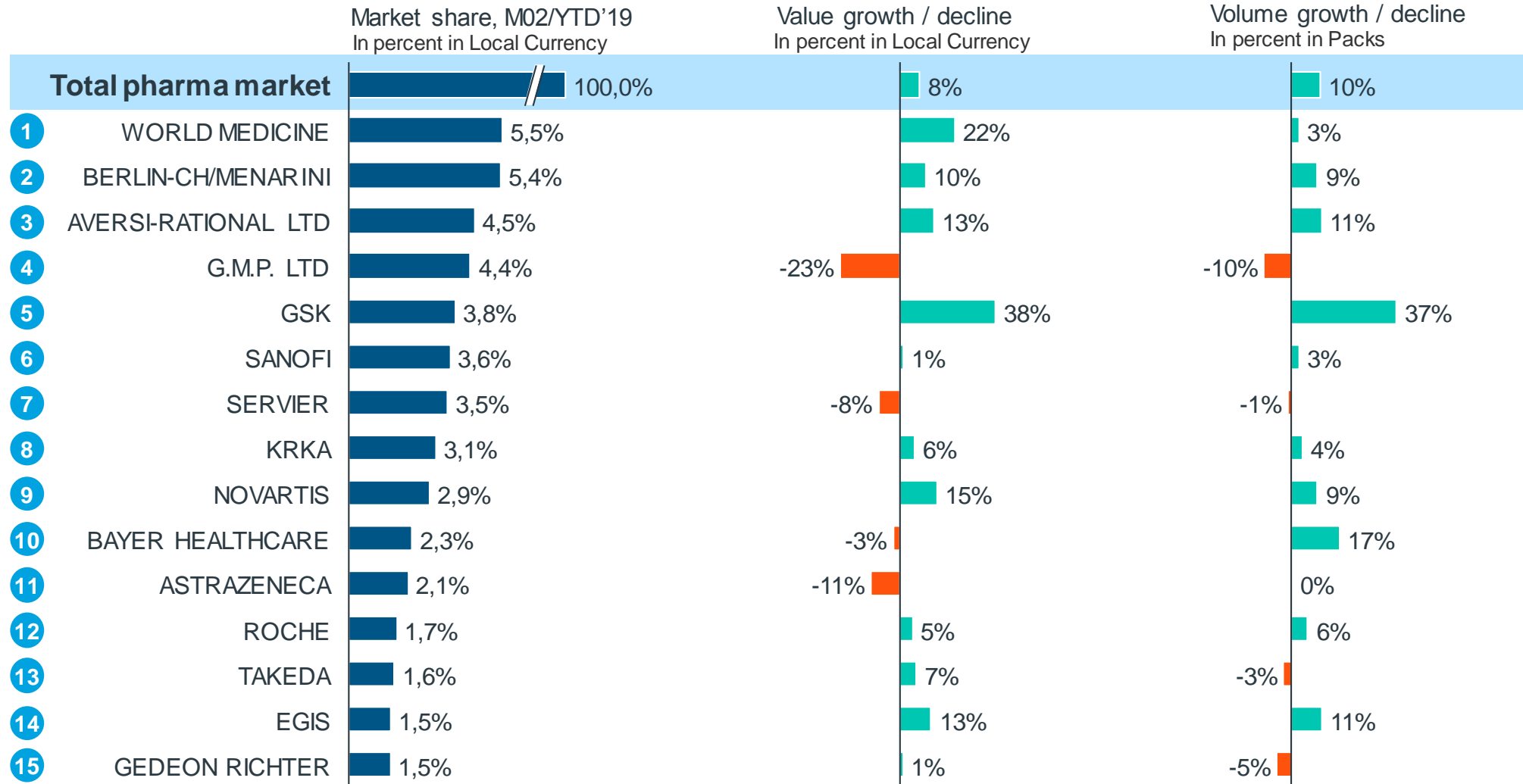
Market grew by 7,8% in value and by 10% in volume



Indicator	GEL	USD	EUR	PACKS
Value M02/YTD'19, Bln.	0,11	0,04	0,04	0,02
Growth M02/YTD'19%	▲ 7,8%	▲ 1,5%	▲ 10%	▲ 10%

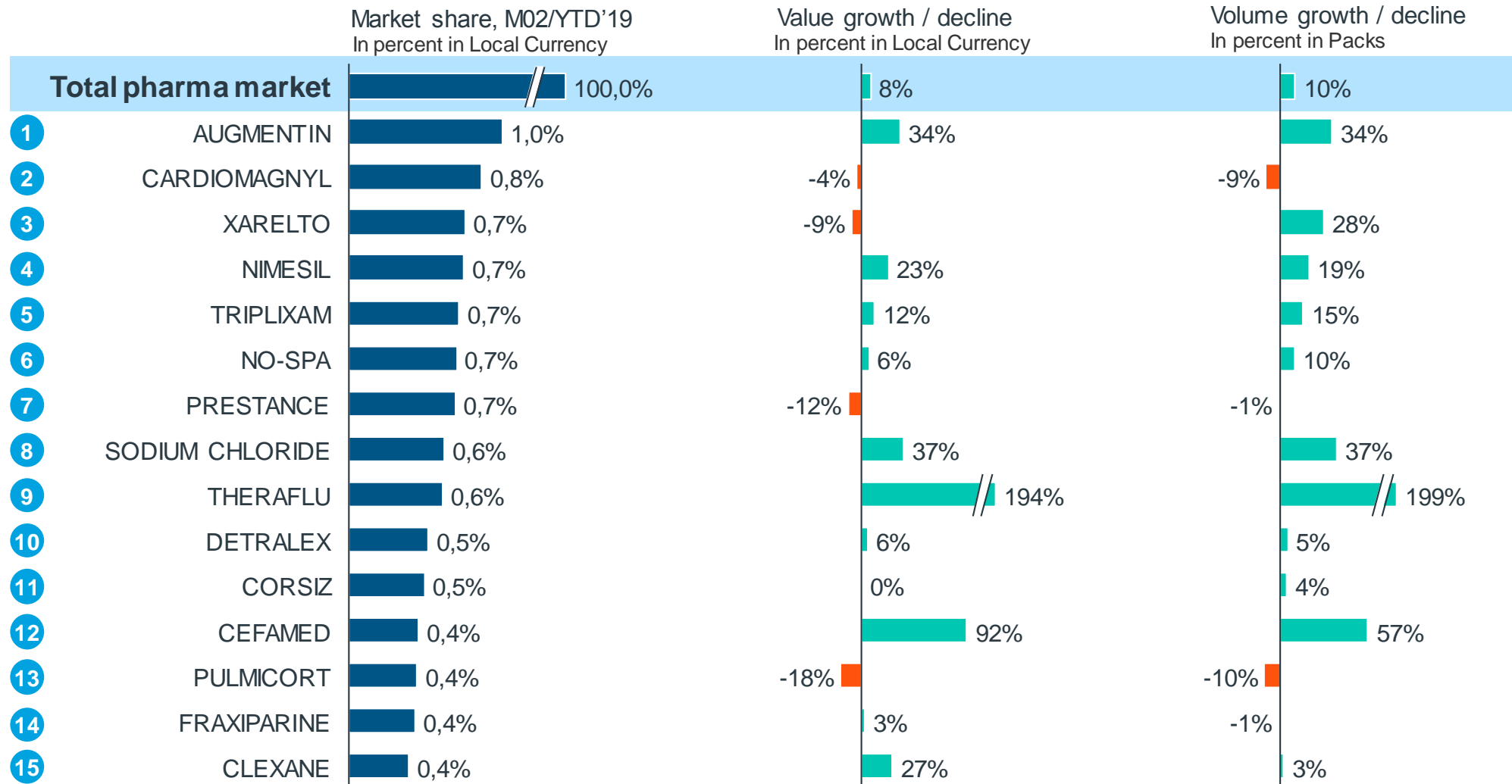


TOP-15 corporations on Georgia market, January-February 2019





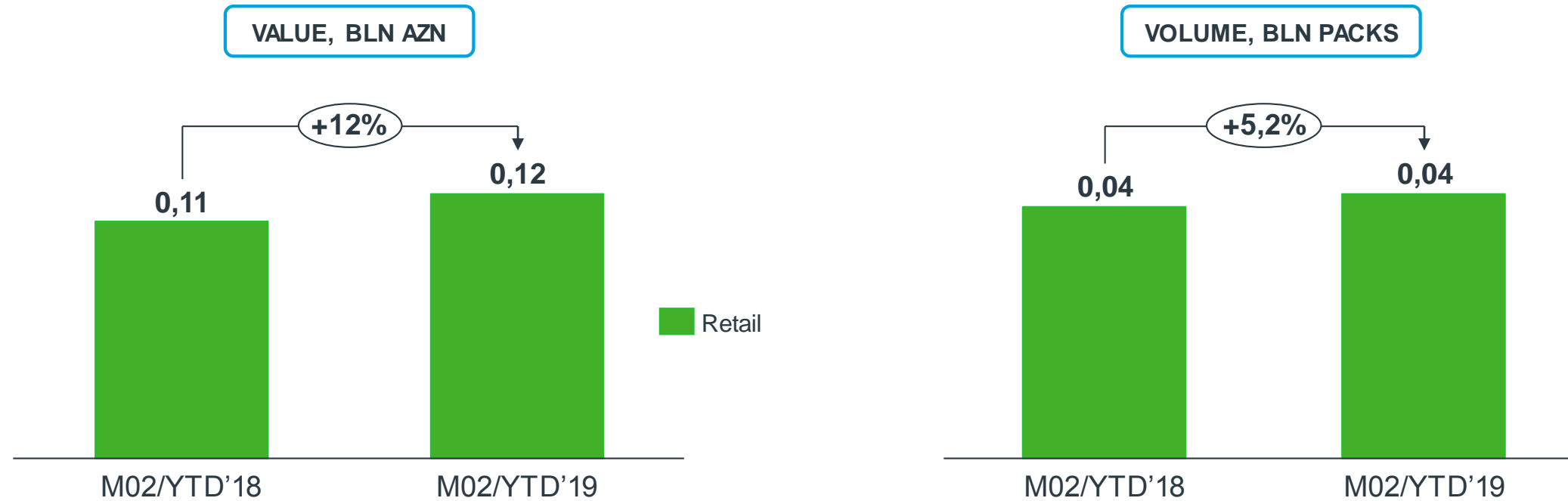
TOP-15 brands on Georgia market, January-February 2019





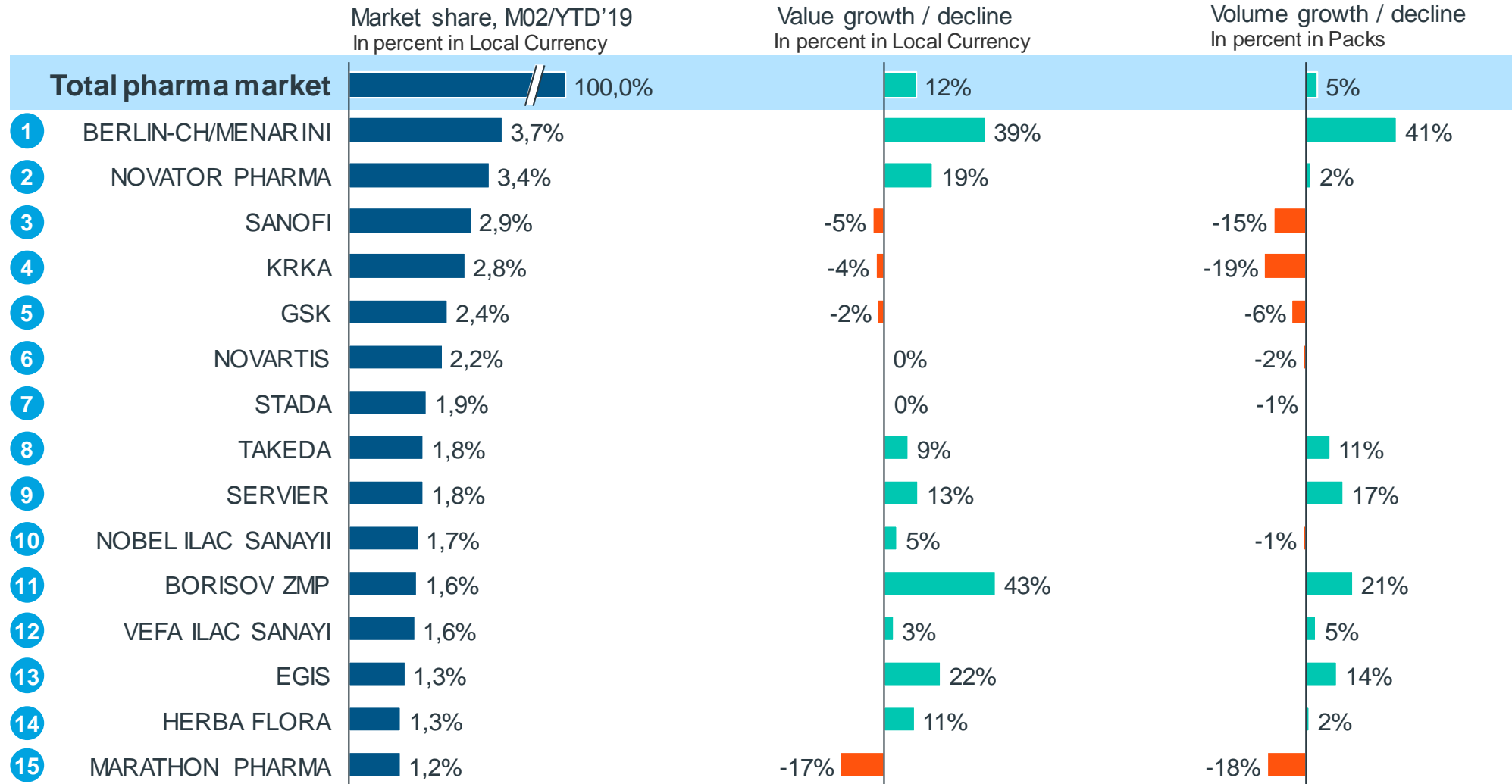
Azerbaijan pharma market growth in January-February 2019

Market grew by 12% in value and by 5,2% in volume



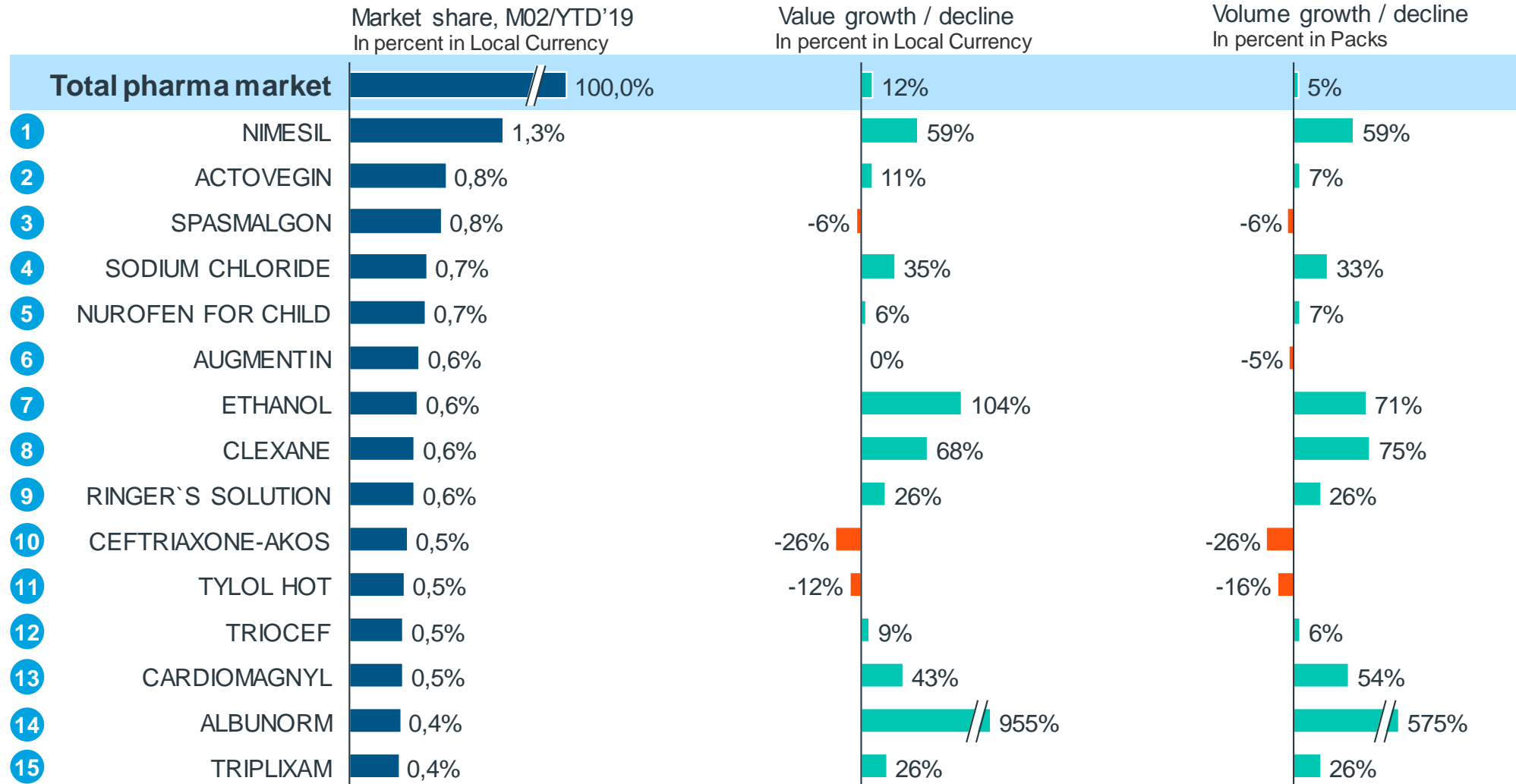
Indicator	AZN	USD	EUR	PACKS
Value M02/YTD'19, Bln.	0,12	0,07	0,06	0,04
Growth M02/YTD'19, %	▲ 12%	▲ 12%	▲ 21%	▲ 5,2%

TOP-15 corporations on Azerbaijan market, January-February 2019





TOP-15 brands on Azerbaijan market, January-February 2019



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