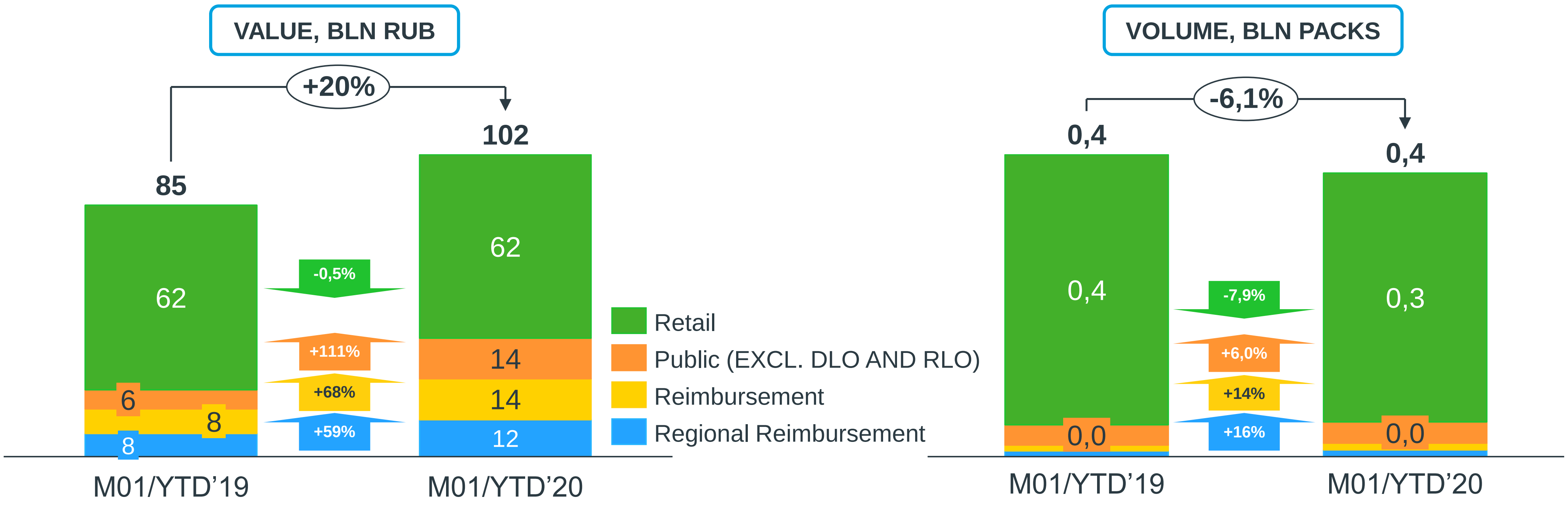
Facts from IQVIA

M01 2020

Russian pharma market growth in January 2020

Market grew by 20% in value and decreased by 6,1% in volume

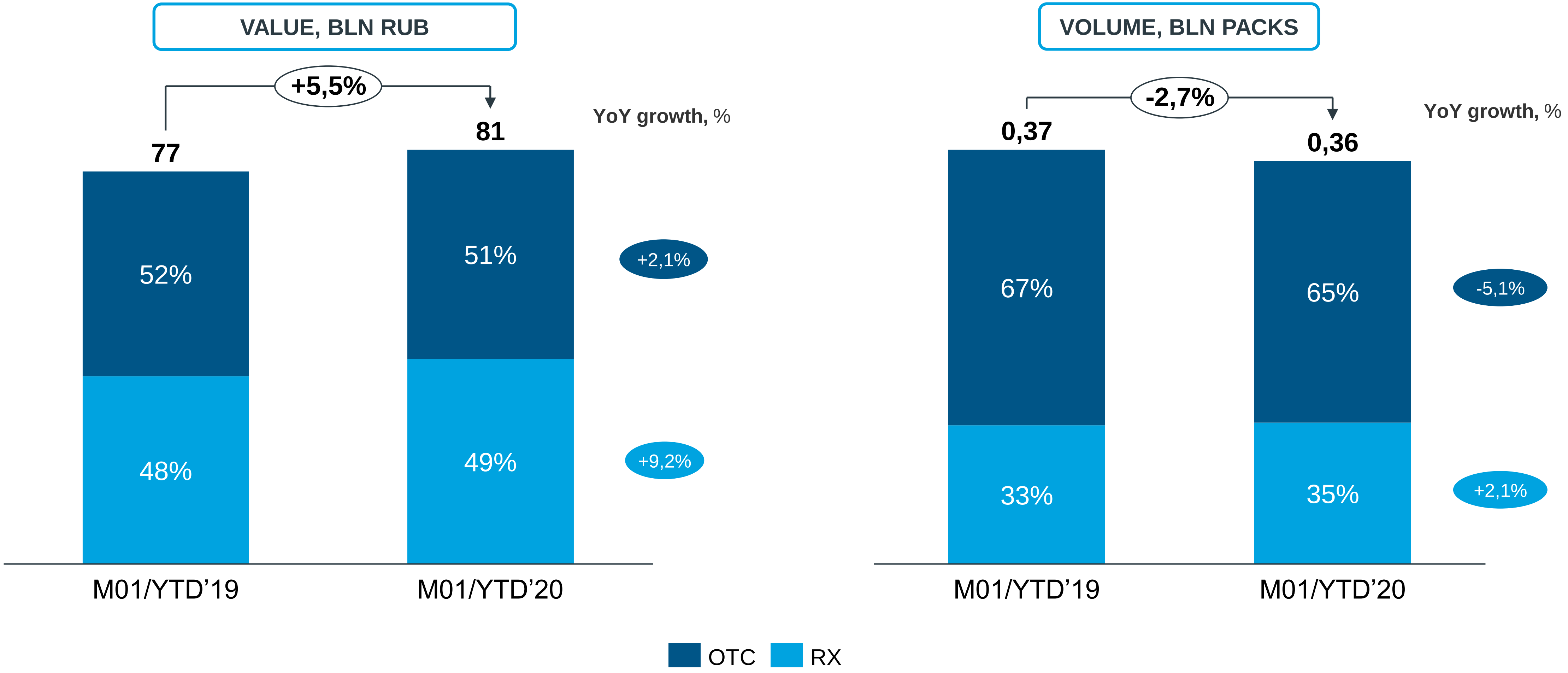


Indicator	RUB	USD	EUR	PACKS
Value M01/YTD'20, Bln.	102	1,7	1,5	0,4
Growth M01/YTD'20%	▲ 20%	▲ 31%	▲ 34%	▼ -6,1%

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

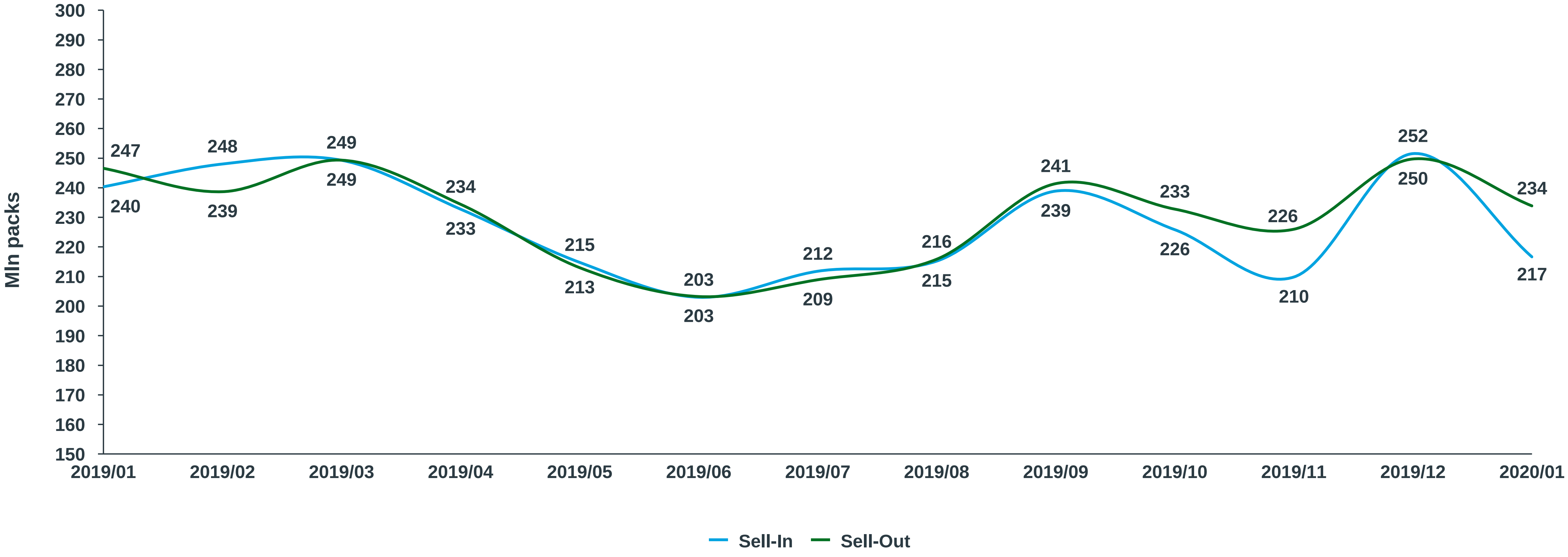
Russian pharma market growth in January 2020

Retail Sell-Out: Market grew by 5,5% in value and decreased by 2,7% in volume



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

Sell-In vs Sell-Out, OTC registered drugs



Source: Retail Audit and Pharmatrend. OTC registered drugs

TOP-15 corporations on Russian market, January 2020

		Market share, M01/YTD'20 In percent in Local Currency	Value growth / decline In percent in Local Currency	Volume growth / decline In percent in Packs
	Total pharma market	100,0%	20%	-6%
1	SANOFI-AVENTIS	4,6%	15%	-4%
2	BAYER HEALTHCARE	3,7%	12%	-5%
3	NOVARTIS	3,4%	54%	5%
4	TAKEDA	2,9%	6%	-7%
5	JOHNSON & JOHNSON	2,8%	30%	-16%
6	PFIZER	2,5%	59%	2%
7	ASTELLAS PHARMA	2,2%	68%	16%
8	TEVA	2,1%	-2%	-8%
9	SERVIER	2,1%	-5%	-11%
10	ROCHE	2,1%	134%	-2%
11	SANDOZ	2,0%	1%	-6%
12	OTCPHARM	2,0%	-1%	-10%
13	MERCK SHARP DOHME	1,9%	68%	-3%
14	ABBOTT	1,8%	4%	-2%
15	ASTRAZENECA	1,8%	26%	29%

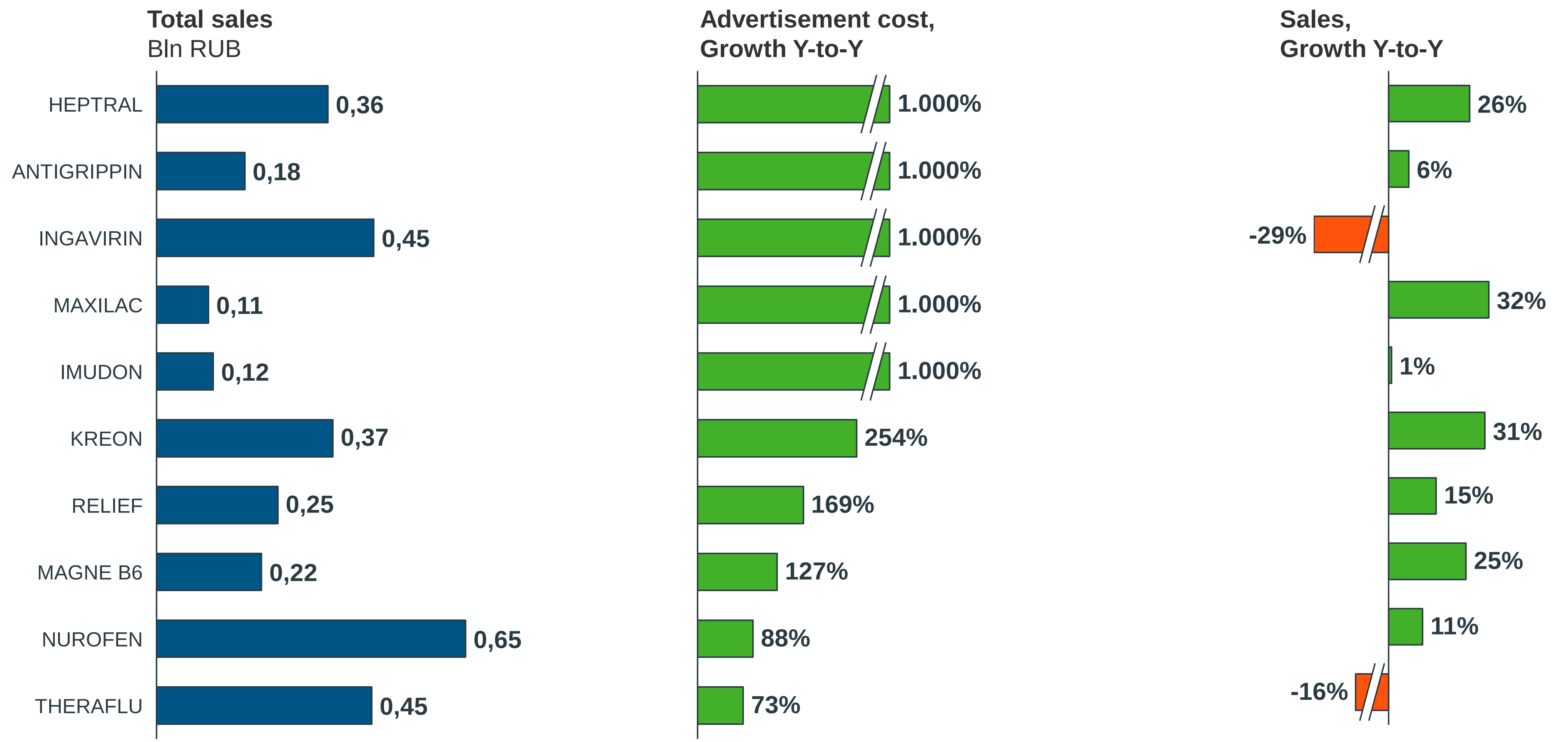
Source: IQVIA databases. Retail, Public, DLO, RLO (excluding food supplements and diagnostic agents), TRD Prices

TOP-15 brands on Russian market, January 2020

#	Brand	Market share, M01/YTD'20 In percent in Local Currency	Value growth / decline In percent in Local Currency	Volume growth / decline In percent in Packs
	Total pharma market	100,0%	20%	-6%
1	ULTRIX QUADRI	1,4%		
2	ELIZARIA	1,0%		
3	XARELTO	0,9%	41%	37%
4	TOUJEO SOLOSTAR	0,8%	15%	13%
5	KEYTRUDA	0,7%	266%	265%
6	IMBRUVICA	0,6%	214%	215%
7	ADVAGRAF	0,6%	2 373%	2 979%
8	HEMATE P	0,6%	8 747%	7 603%
9	SINNOVEX	0,6%	3 737%	3 744%
10	OCTANATE	0,5%	12%	47%
11	OPDIVO	0,5%	104%	91%
12	LEVEMIR FLEXPEN	0,5%	6%	5%
13	AVEGRA BIOCAD	0,5%	211%	-1%
14	NOVORAPID FLEXPEN	0,4%	30%	29%
15	INGAVIRIN	0,4%	-24%	-41%

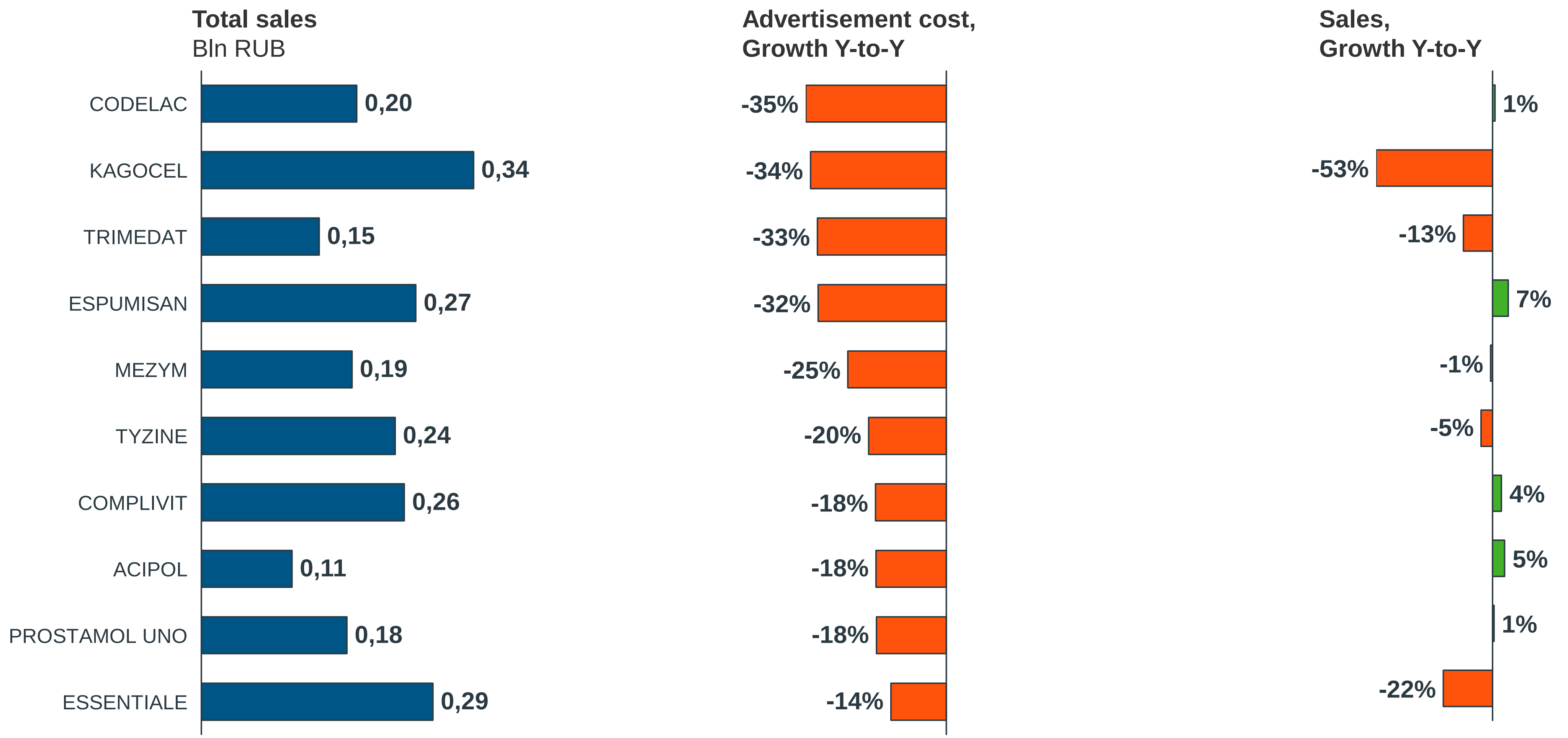
Source: IQVIA databases. Retail, Public, DLO, RLO (excluding food supplements and diagnostic agents), TRD Prices

TOP-10 products by growth in advertisement investments in January 2020



The rank in 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 2020



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

Rating of Russian distributors, 1-4Q 2019

TOP-10 distributors on the market of gross sales, 1-4Q 2019

#	Distributor	Market share in gross sales, %		Change in gross sales 1-4Q 2019/1-4Q 2018, %
		1-4Q 2019	1-4Q 2018	
1	Protek	13,8%	14,4%	2,0%
2	Pulse	13,3%	13,1%	8,2%
3	Katren	12,4%	13,9%	-4,6%
4	Pharmkomplekt	5,5%	5,1%	14,8%
5	FK Grand Kapital	4,3%	3,8%	21,2%
6	R-Pharm	4,0%	4,2%	1,5%
7	BSS	3,5%	3,4%	10,2%
8	Profitmed	2,94%	2,78%	12,6%
9	GDP*	2,62%	2,56%	9,4%
10	Asfadis**	2,50%	2,51%	6,3%
Total		**64,7%**	**65,7%**	**8,2%**

*Expert assessment
**In Q2 2019 «Asfadis» distributors association was established, which included 7 regional companies: Accentmed, Avikon FC, Lesan Pharma, Alenfarma, Asti Plus, Donsky Hospital, Asti.
Source: based on data from distributors participating in the rating

TOP-10 distributors on the budget market,1-4Q 2019

#	Distributor	Distributor Type	Head Office	Relative volume of budget sales, 1-4Q 2019	Share of budget sales from the gross sales volume, %
1	R-Pharm	National	Moscow	1,000	74%
2	Pharmstandard**	-	-	0,804	-
3	Irvin 2	Regional	Moscow	0,541	94%
4	BSS	National	S.Petersburg	0,519	44%
5	Protek	National	Moscow	0,353	8%
6	GC Euroservice	Interregional	Moscow	0,344	71%
7	Severo-zapad	Interregional	S.Petersburg	0,171	95%
8	Farmimex*	-	-	0,153	-
9	BIOTEC*	-	-	0,111	-
10	Pharmacevt	Interregional	Rostov-on-Don	0,098	39%

*Expert assessment
**Data based on analysis of IQVIA tender base
Source: IQVIA, based on data from distributors participating in the rating

TOP-10 distributors on the market of secondary sales,1-4Q 2019

#	Distributor	Distributor Type	Head Office	Relative volume of secondary distribution, 1-4Q 2019	Share of secondary distribution sales from the gross sales volume, %
1	Asfadis**	Interregional	Moscow	1,257	45%
2	Pharmkomplekt	National	N.Novgorod	1,000	16%
3	R-Pharm	National	Moscow	0,822	19%
4	Protek	National	Moscow	0,619	4%
5	Pulse	National	Khimki	0,587	4%
6	Pharmacevt	Interregional	Rostov-on-Don	0,476	59%
7	BSS	National	S.Petersburg	0,456	12%
8	FK Grand Kapital	National	Moscow	0,426	9%
9	Profitmed	Interregional	Moscow	0,395	12%
10	Katren	National	Novosibirsk	0,386	3%

**In Q2 2019 «Asfadis» distributors association was established, which included 7 regional companies: Accentmed, Avikon FC, Lesan Pharma, Alenfarma, Asti Plus, Donsky Hospital, Asti.
Source: based on data from distributors participating in the rating

Rating of Russian pharmacy chains 1-4Q 2019

TOP-10 pharmacy chains and pharmacy associations by sales of drugs (excluding reimbursement drugs supply), 1-4Q 2019

#	Category	Regions	Pharmacy Chain / Pharmacy Association	Number of stores (1 October 2019)	Market share of pharmacy chain on the retail market, drugs only, 1-4Q 2019, %	Change in drug sales 1-4Q 2019/1-4Q 2018, %	The indicator of the relative sales of drugs, 1-4Q 2019 *(relative to the leading audited company)*	Average check, rub.	The rank of gross sales, 1-4Q 2019 *(relative to the leading audited company)*
1	Fed.	81	ASNA	9 345	14,05%	10,6%	2,233	322	-
2	Fed.	53	Rigla[1]	2 846	6,3%	17,0%	1,000	533	1
3	Fed.	39	Erkafarm[2]	1 168	5,2%	0,2%	0,823	-	2
5	Fed.	8	Pharmacy chain 36,6*[4]	1 402	4,44%	2,9%	0,706	740	3
4	Intr.	27	Iris[3]	1 621	3,9%	7,2%	0,623	-	6
6	Fed.	10	Neo-farm	736	3,79%	26,9%	0,603	665	4
7	Fed.	35	Vita (Samara)	1 742	3,59%	36,3%	0,571	481	5
8	Fed.	44	April	1 479	3,17%	22,8%	0,504	453	7
9	Fed.	46	Planeta zdorov'ya*	1 745	2,94%	7,5%	0,468	-	8
10	Fed.	8	Farmland	1 265	2,40%	20,7%	0,382	496	9
Total:				**23 330**	**49,8%**	**15,2%**			

Fed. - federal; Intr. - interregional; Reg. -regional
*Expert assessment
1Including OZ, Zhivika and DOMfarma
2Including Including Doktor Stoletov, Ozerki, Raduga, Pervaya pomoshch', Ladushka, Khoroshaya apteka, Vashe zdorov'ye, Farmvolga, Narodnaya apteka, Novaya apteka, MosApteka, Ozerki u doma, Samson-pharma
3Including Fakmakopeyka, Farmakopeyka 24, Khelmi, Tvoy doktor, Zdes' apteka, Farmani, Aptechestvo, Stavropol'skiye gorodskiye apteki, Novuyu apteka and Minitsen
4Including AVE Group; Gorzdrav; A5 Group and Kalina-Pharm
Source: based on data from pharmacy chains and pharmacy associations participating in the rating

TOP-10 pharmacy chains by gross sales (excluding reimburseme drugs supply), 1-4Q 2019

#	Pharmacy Chain	The indicator of the relative gross sales of drugs, 1-4Q 2019	Change in gross sales 1-4Q 2019/ 1-4Q 2018, %
1	Rigla[1]	1,000	16,7%
2	Erkafarm[2]	0,802	0,1%
3	Pharmacy chain 36,6*[4]	0,642	2,9%
4	Neo-farm	0,550	9,9%
5	Vita (Samara)	0,546	26,9%
6	Iris[3]	0,527	31,6%
7	April	0,483	26,2%
8	Planeta zdorov'ya*	0,451	25,2%
9	Farmland	0,372	20,6%
10	Melodiya zdorov'ya[5]	0,257	61,6%

Fed. - federal; Intr. - interregional; Reg. -regional
*Expert assessment
1Including OZ, Zhivika and DOMfarma
2Including Including Doktor Stoletov, Ozerki, Raduga, Pervaya pomoshch', Ladushka, Khoroshaya apteka, Vashe zdorov'ye, Farmvolga, Narodnaya apteka, Novaya apteka, MosApteka, Ozerki u doma, Samson-pharma
3Including Fakmakopeyka, Farmakopeyka 24, Khelmi, Tvoy doktor, Zdes' apteka, Farmani, Aptechestvo, Stavropol'skiye gorodskiye apteki, Novuyu apteka and Minitsen
4Including AVE Group; Gorzdrav; A5 Group and Kalina-Pharm
5Including own pharmacies, excluding franchising and partners
Source: based on data from pharmacy chains and pharmacy associations participating in the rating

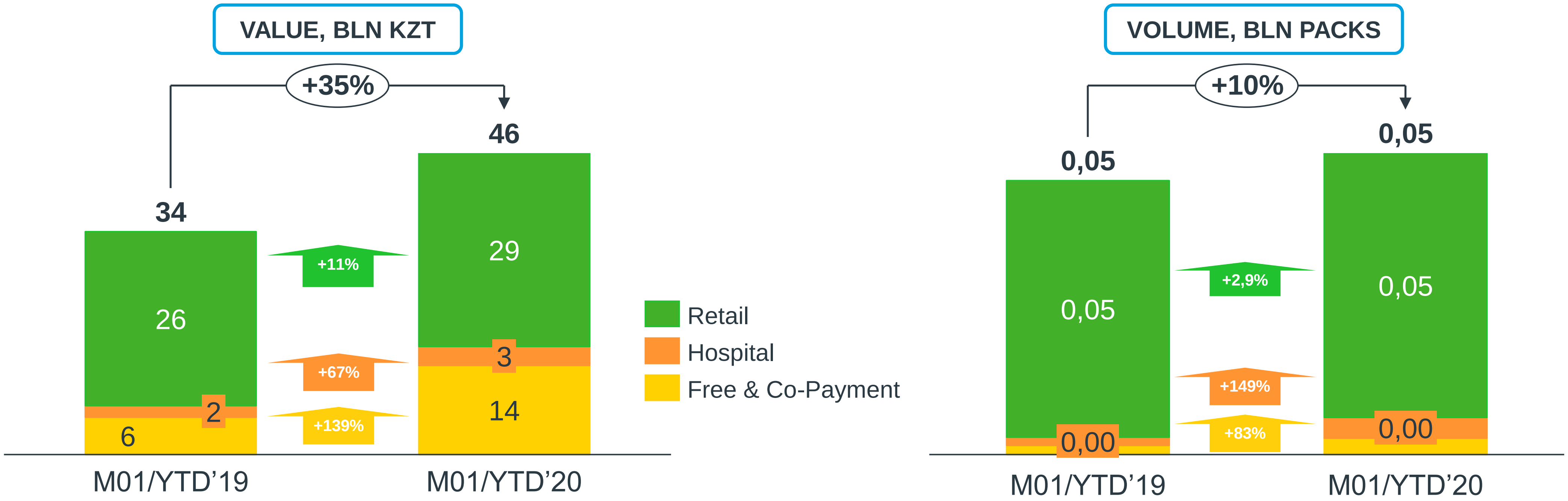
TOP-6 pharmacy associations and service platforms by sales of drugs (excluding reimbursement drugs supply), 1-4Q 2019

#	Pharmacy Association / Service Platform	Head Office	Number of stores (1 October 2019)	Market share of pharmacy association on the retail market, drugs only, 1-4Q 2019, %	Change of drug sales 1-4Q 2019/1-4Q 2018, %	The indicator of the relative sales of drugs, 1-4Q 2019
1	ASNA	Moscow	9 345	14,05%	10,6%	1,000
2	ProApteka	Moscow	5 794	7,38%	29,7%	0,455
3	MFU[1]	S.Petersburg	4 411	1,84%	74,6%	0,129
4	Sozvezdiye	Moscow	3 213	2,23%	62,1%	0,147
5	VESNA[2]	S.Petersburg	1 664	1,41%	18,8%	0,103
6	Zdravcity	Moscow	15 150	0,18%	334,1%	0,014

1MedPharm Unity
2All-Russian United Commonwealth of Independent Drugstores
Source: based on data from pharmacy associations and service platform participating in the rating

Kazakhstan pharma market growth in January 2020

Market grew by 35% in value and by 10% in volume



Indicator	**KZT**	**USD**	**EUR**	**PACKS**
Value M01/YTD'20, Bln.	45,84	0,12	0,11	0,05
Growth M01/YTD'20%	▲ 35%	▲ 35%	▲ 39%	▲ 10%

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

TOP-15 corporations on Kazakhstan market, January 2020

		Market share, M01/YTD'20 In percent in Local Currency	Value growth / decline In percent in Local Currency	Volume growth / decline In percent in Packs
	Total pharma market	100,0%	35%	10%
1	NOBEL-AFF	5,5%	46%	13%
2	SANTO	5,5%	23%	11%
3	TAKEDA	5,4%	111%	7%
4	SANOFI-AVENTIS	3,7%	27%	7%
5	BAYER HEALTHCARE	3,4%	25%	-1%
6	ABBOTT	2,9%	22%	41%
7	JOHNSON & JOHNSON	2,8%	118%	12%
8	TEVA	2,6%	5%	1%
9	GLAXOSMITHKLINE	2,5%	38%	29%
10	SANDOZ GROUP	2,3%	25%	35%
11	NOVO NORDISK	2,1%	1 107%	361%
12	ASTELLAS PHARMA	2,0%	34%	38%
13	WORLD MEDICINE	2,0%	18%	21%
14	MENARINI	1,9%	14%	7%
15	ROCHE	1,9%	74%	73%

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

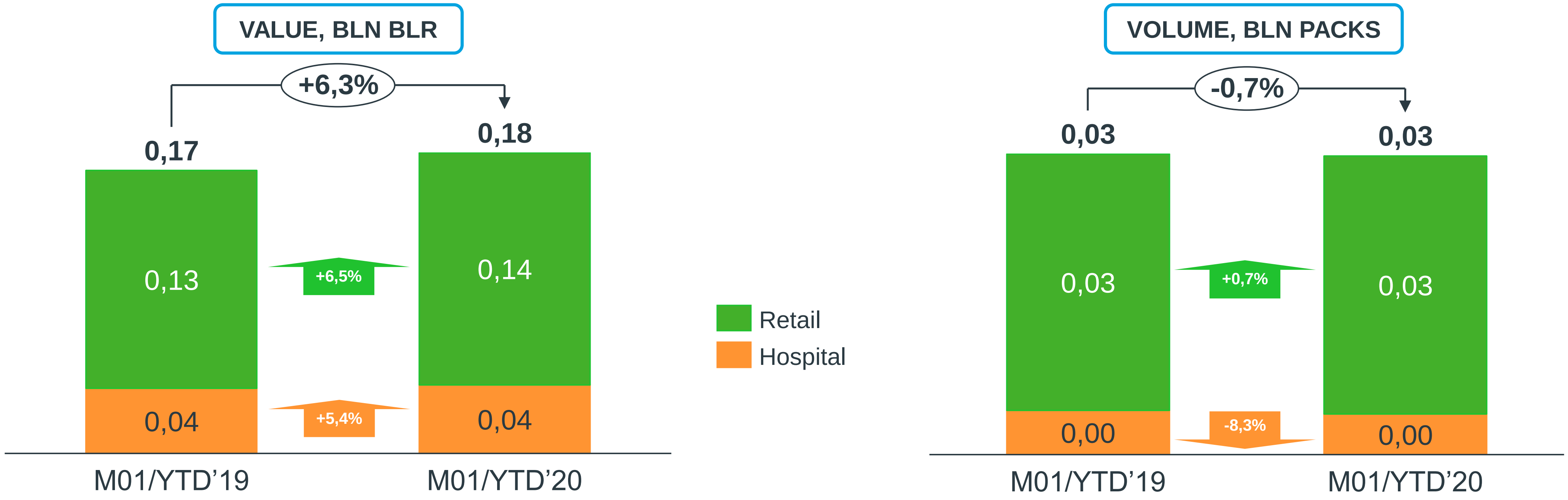
TOP-15 brands on Kazakhstan market, January 2020

#	Brand	Market share, M01/YTD'20 In percent in Local Currency	Value growth / decline In percent in Local Currency	Volume growth / decline In percent in Packs
	Total pharma market	100,0%	35%	10%
1	IMMUTIN	1,7%	66%	77%
2	OCTANATE	1,1%	162%	154%
3	IMMUNATE	1,1%	253%	212%
4	NEXAVAR	0,9%	223%	223%
5	PHYSIOTENS	0,9%	91%	137%
6	ELAPRASE	0,8%	940%	939%
7	FEIBA	0,8%	1 243%	618%
8	THERAFLU	0,8%	36%	39%
9	SIMPONI	0,8%	288%	288%
10	NATRIUM CHLORIDUM	0,7%	90%	89%
11	HERCEPTIN	0,7%	748%	749%
12	VIFERON	0,7%	30%	31%
13	CANEPHRON N	0,7%	57%	54%
14	SPIRIVA RESPIMAT	0,7%	978%	994%
15	FLEMOXIN SOLUTAB	0,6%	65%	74%

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

Belarus pharma market growth in January 2020

Market grew by 6,3% in value and decreased by 0,7% in volume



Indicator	BLR	USD	EUR	PACKS
Value M01/YTD'20, Bln.	0,18	0,09	0,08	0,03
Growth M01/YTD'20%	▲ 6,3%	▲ 8,3%	▲ 11%	▼ -0,7%

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

TOP-15 corporations on Belarus market, January 2020

#	Corporation	Market share, M01/YTD'20 (In percent in Local Currency)	Value growth / decline (In percent in Local Currency)	Volume growth / decline (In percent in Packs)
	Total pharma market	100,0%	6%	-1%
1	BORISOV.ZMP BEL	7,0%	0%	-5%
2	BELMEDPREP BEL	6,5%	-7%	2%
3	LEKFARM BELARUS	5,3%	12%	9%
4	SANOFI	4,0%	-9%	-16%
5	PHARMLAND BEL	3,9%	8%	4%
6	ASTELLAS PHARMA	3,7%	167%	44%
7	NOVARTIS	3,6%	9%	8%
8	BAYER HEALTHCARE	3,4%	10%	4%
9	PHARMTECHNOLOG.BEL	2,5%	-12%	-22%
10	MINSKINTERCAPS	2,5%	4%	-5%
11	BERLIN-CH/MENARINI	2,3%	23%	22%
12	GEDEON RICHTER	2,3%	7%	19%
13	KRKA DD	2,2%	6%	5%
14	GLAXOSMITHKLINE	2,1%	23%	4%
15	TAKEDA	1,9%	6%	9%

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

TOP-15 brands on Belarus market, January 2020

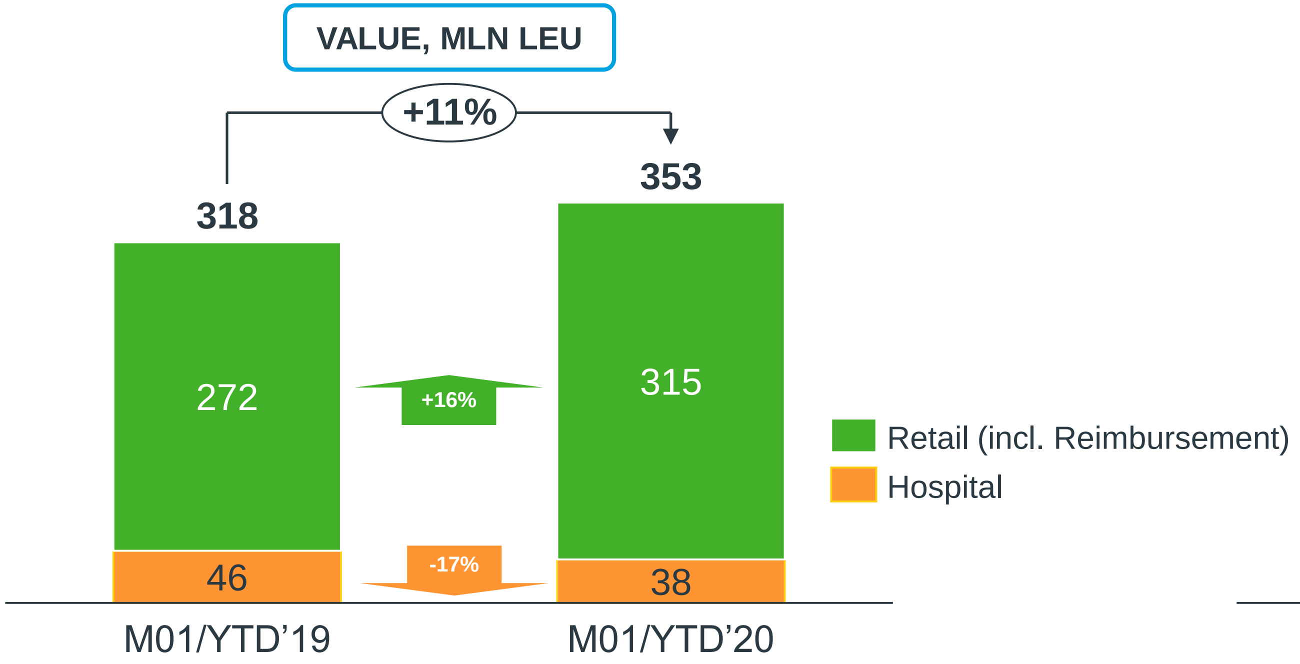
#	Brand	Market share, M01/YTD'20 (In percent in Local Currency)	Value growth / decline (In percent in Local Currency)	Volume growth / decline (In percent in Packs)
	Total pharma market	100,0%	6%	-1%
1	ADVAGRAF	2,8%	432%	544%
2	XARELTO	1,4%	13%	26%
3	VIMIZIM	1,3%		
4	SPECTRILA	1,2%		
5	SODIUM CHLORIDE	0,8%	-5%	-6%
6	CEREPRO	0,7%	14%	12%
7	METFORMIN	0,7%	10%	9%
8	OCTANATE	0,7%	774%	1 128%
9	HEXAXIM	0,6%	172%	296%
10	GLICLAZIDE MR	0,6%	1%	-33%
11	LISINOPRIL	0,6%	0%	-2%
12	ACTOVEGIN	0,5%	17%	12%
13	ALDURAZYME	0,5%	10%	13%
14	ALUVIA	0,5%	920%	875%
15	PHENYBUT	0,5%	36%	36%

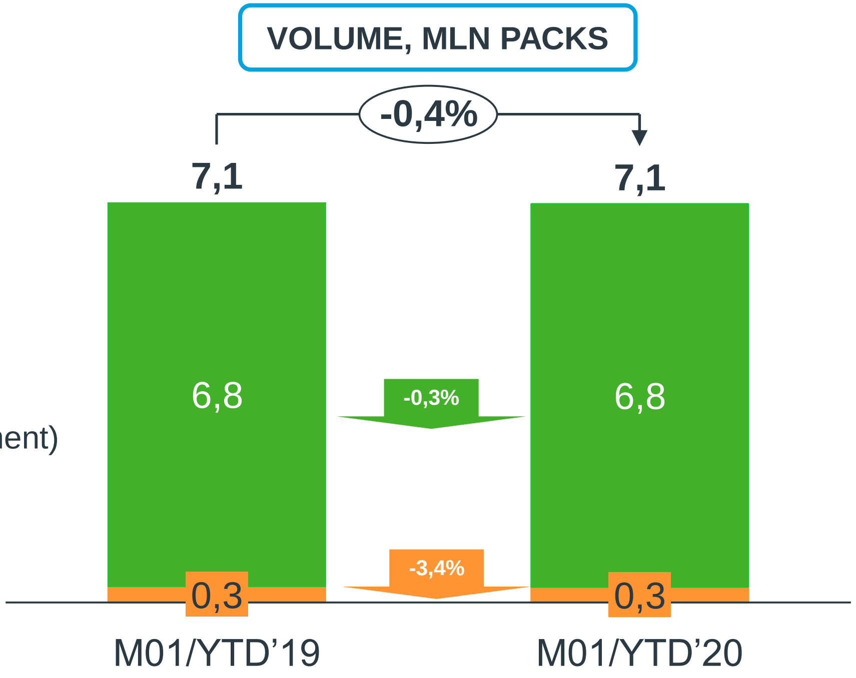
Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices

IQVIA

Moldova pharma market growth in January 2020

Market grew by 11% in value and decreased by 0,4% in volume





Indicator	LEU	USD	EUR	PACKS
Value M01/YTD'20, Mln.	353	20,3	18,2	7,1
Growth M01/YTD'20%	▲ 11%	▲ 9,2%	▲ 12%	▼ -0,4%

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

TOP-15 corporations on Moldova market, January 2020

#	Corporation	Market share, M01/YTD'20 In percent in Local Currency	Value growth / decline In percent in Local Currency	Volume growth / decline In percent in Packs
	Total pharma market	100,0%	11%	0%
1	NOVARTIS	9,2%	52%	-16%
2	BALKAN PHARMA	8,0%	382%	150%
3	MENARINI	6,0%	11%	-1%
4	KRKA	5,2%	3%	-3%
5	GEDEON RICHTER	5,0%	-3%	1%
6	GLAXOSMITHKLINE	3,1%	-10%	-30%
7	TAKEDA	2,6%	42%	23%
8	WORLD MEDICINE	2,4%	17%	7%
9	SANOFI-AVENTIS	2,0%	9%	4%
10	NOBEL ILAC SAN TUR	1,9%	24%	11%
11	BAYER HEALTHCARE	1,7%	23%	17%
12	GRINDEX	1,6%	30%	32%
13	EGIS	1,5%	31%	13%
14	BILIM ILAC SANAYI	1,4%	3%	-6%
15	POLPHARMA SA	1,3%	3%	-3%

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

TOP-15 brands on Moldova market, January 2020

#	Brand	Market share, M01/YTD'20 (In percent in Local Currency)	Value growth / decline (In percent in Local Currency)	Volume growth / decline (In percent in Packs)
	Total pharma market	100,0%	11%	0%
1	GLIVEC	6,2%	93%	93%
2	CARDIOMAGNYL	0,8%	22%	14%
3	TASIGNA	0,7%	128%	128%
4	METHYLPREDNISOLONE-BP	0,7%	17 185%	2 502%
5	SODIUM CHLORIDE	0,6%	-5%	-21%
6	ACTOVEGIN	0,6%	42%	41%
7	GLUCOPHAGE	0,6%	19%	16%
8	LORISTA	0,6%	45%	36%
9	GROPRINOSIN	0,6%	-31%	-32%
10	DIROTON	0,6%	14%	19%
11	NIMESIL	0,5%	-5%	-8%
12	CANEPHRON N	0,5%	37%	26%
13	VIFERON	0,5%	-22%	-31%
14	NUCLEOBUVIR	0,5%	3 227%	1 047%
15	ENANDROL	0,5%	17 907%	18 892%

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

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