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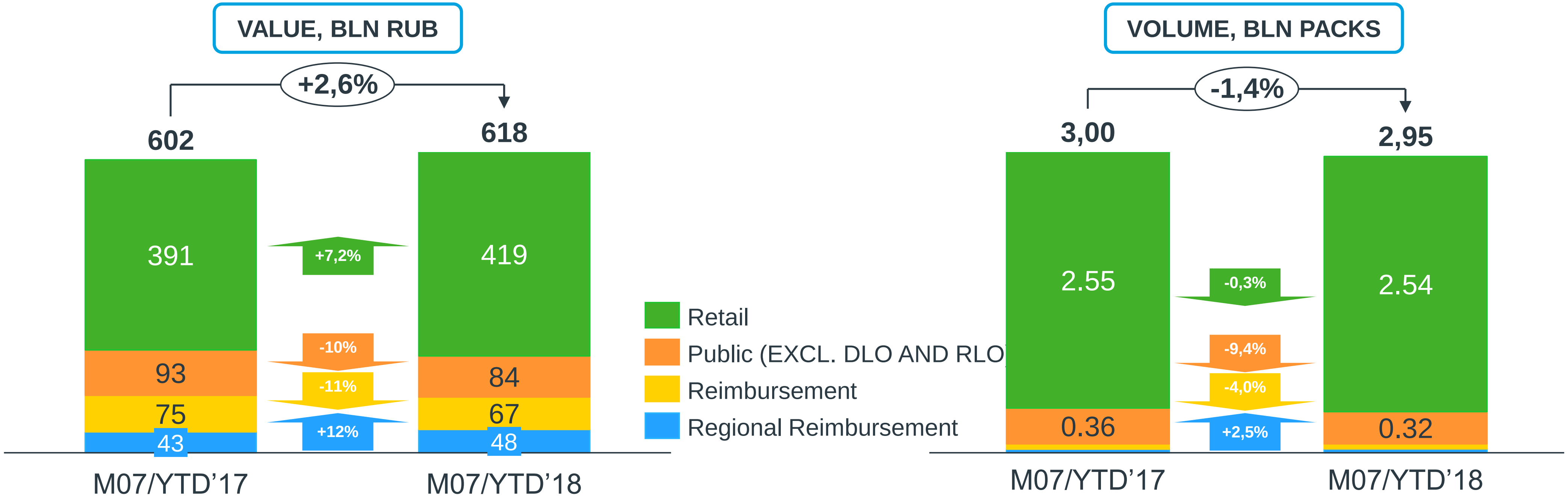
# Facts from IQVIA

M07 2018

# Russia pharma market growth in January-July 2018

*Market grew by 2,6% in value and decreased by 1,4% in volume*

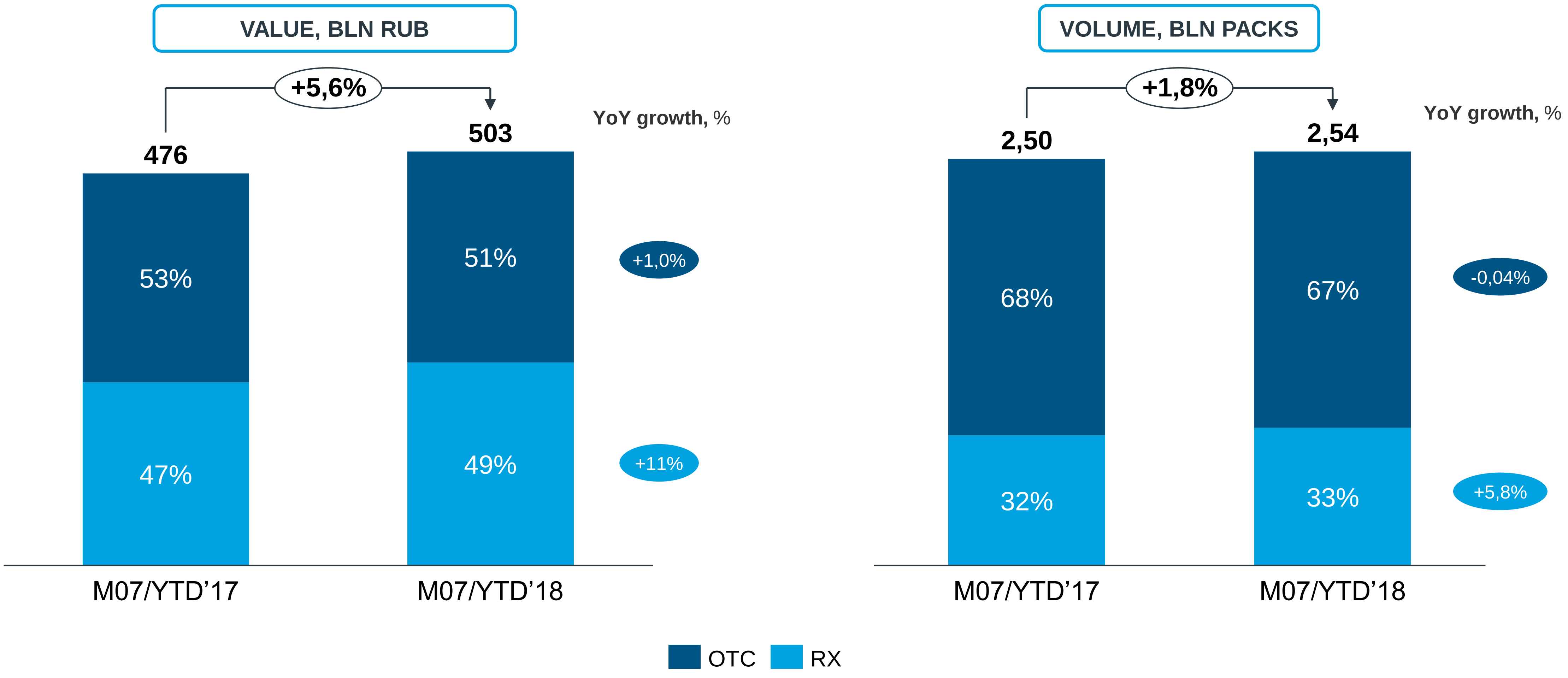



| Indicator | RUB | USD | EUR | PACKS |
|---|---|---|---|---|
| Value M07/YTD 2018, Bln. | 618 | 10,3 | 8,6 | 3,0 |
| Growth M07/YTD,% | ▲ +2,6% | ▼ -0,4% | ▼ -10% | ▼ -1,4% |

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

# Russia pharma market growth in January-July 2018

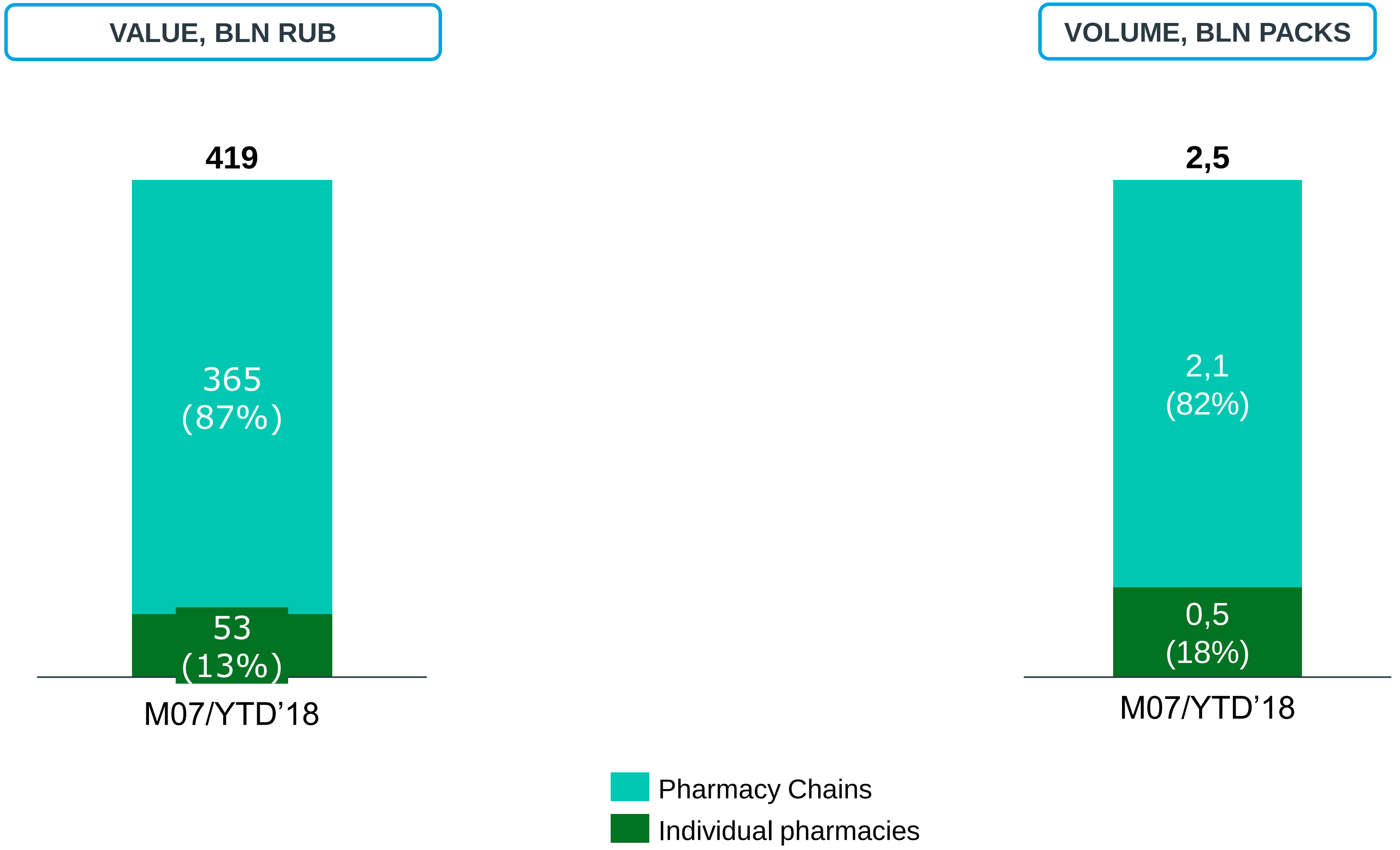
*Retail Sell-Out: Market grew by 5,6% in value and by 1,8% in volume*




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

# Russia retail market structure in January-July 2018

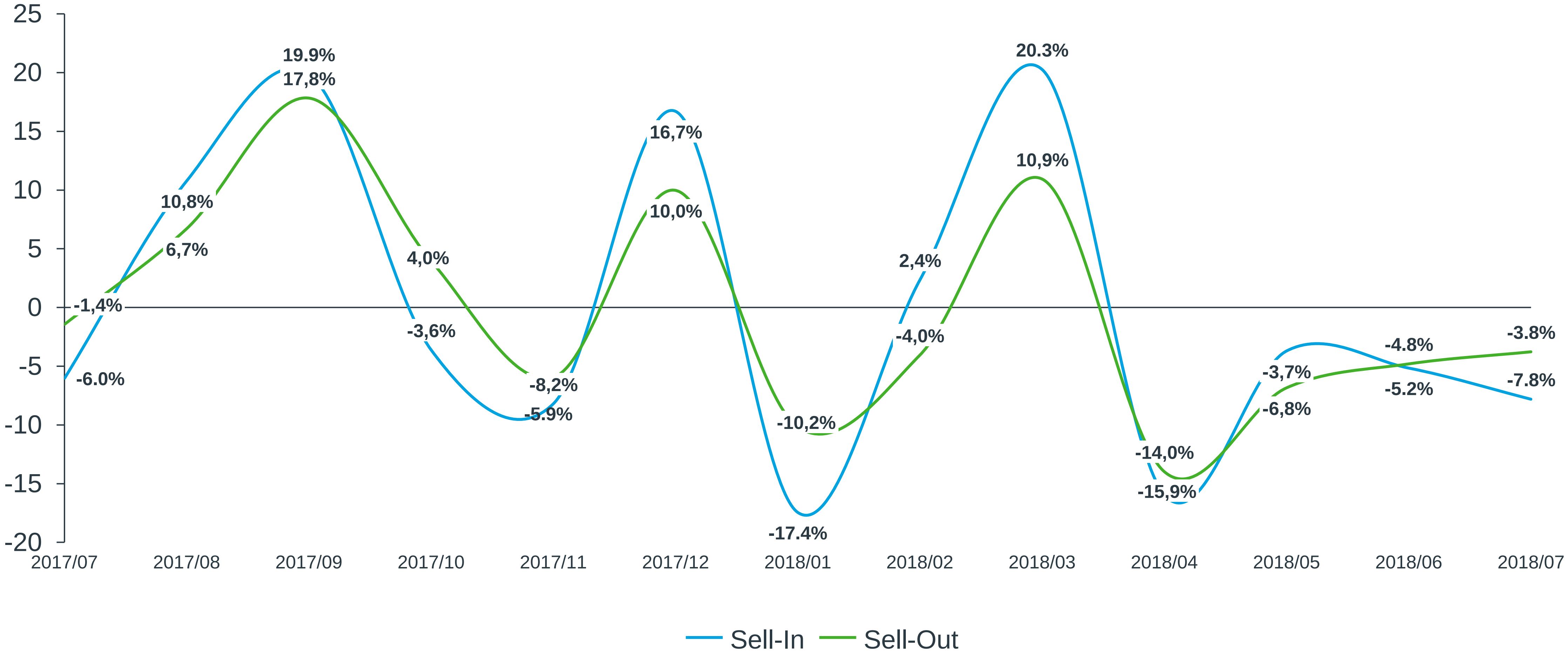
*Retail Sell-In: Share of Pharmacy chains is 87% in value and 82% in volume*




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

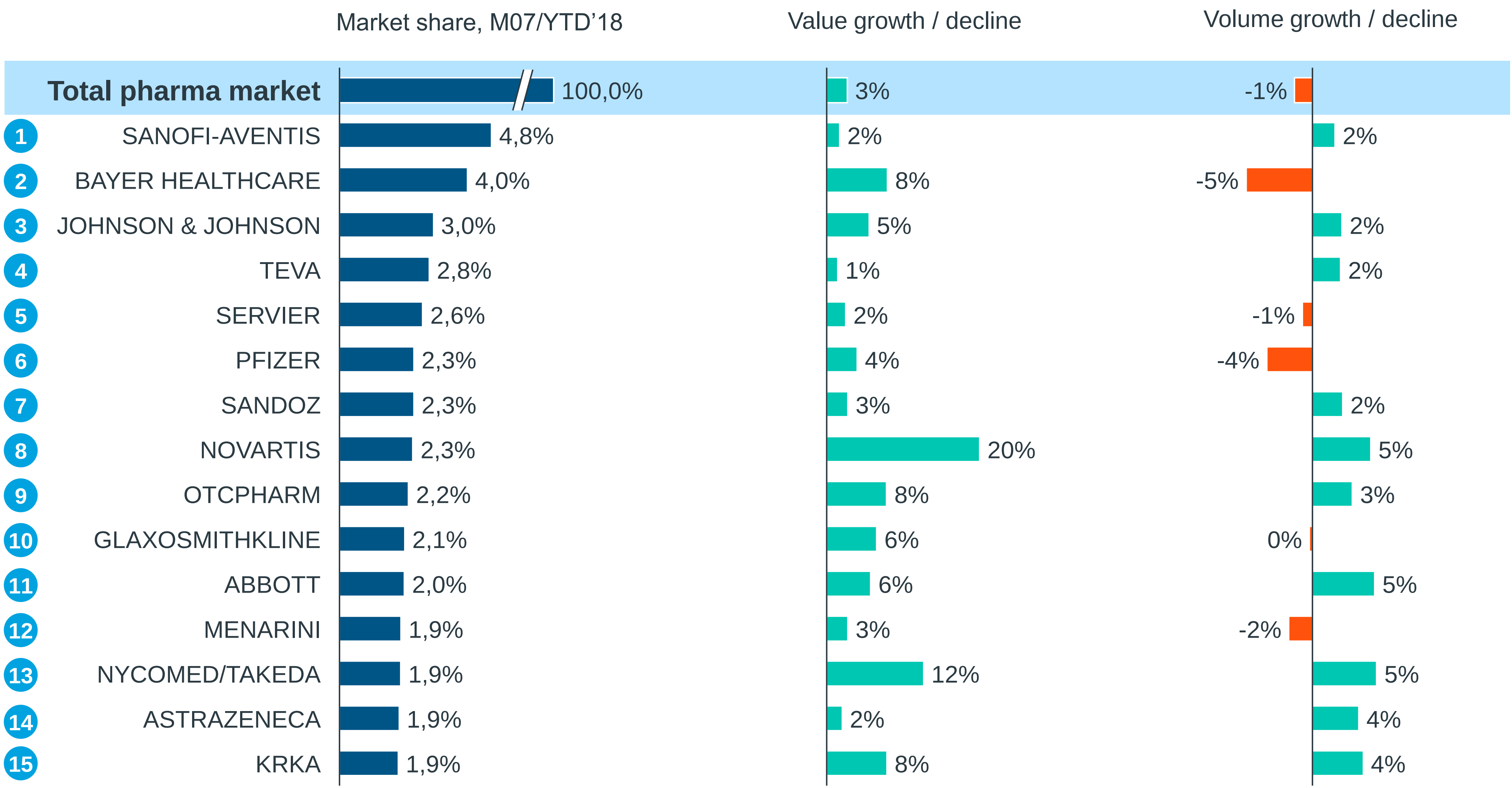
# Sell-In vs Sell-Out, OTC registered drugs

*Month-Over-Month Growth Rates, volume*




Source: Retail Audit and Pharmatrend. OTC registered drugs

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




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

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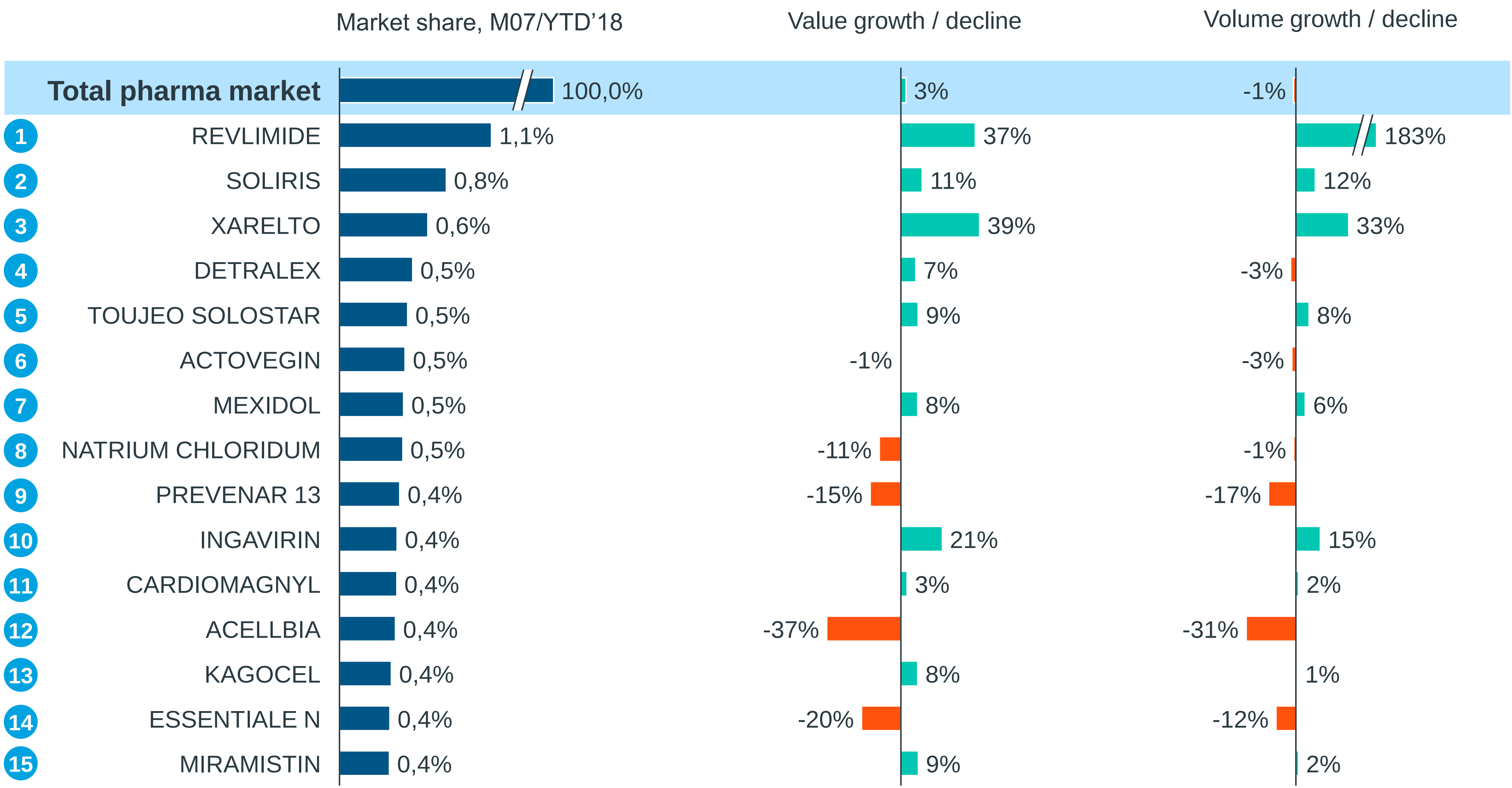
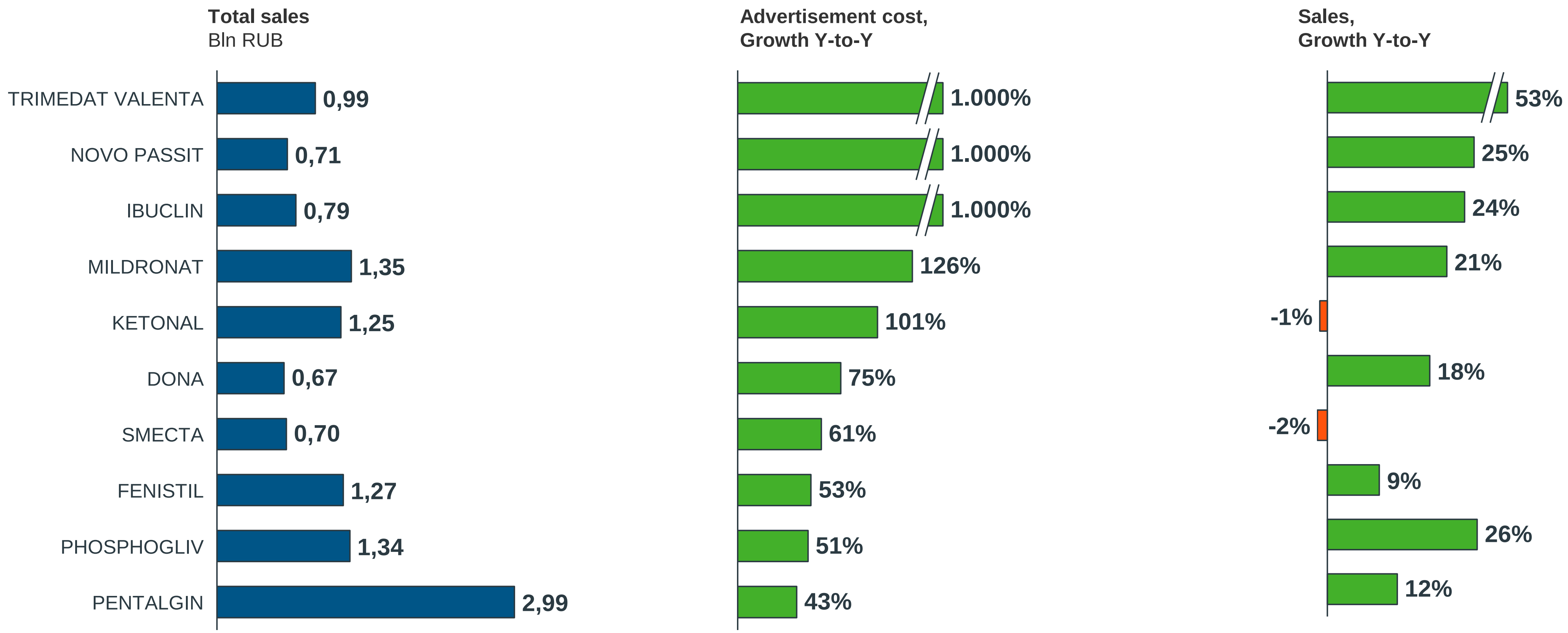
# TOP-15 brands on Russian market, January-July 2018



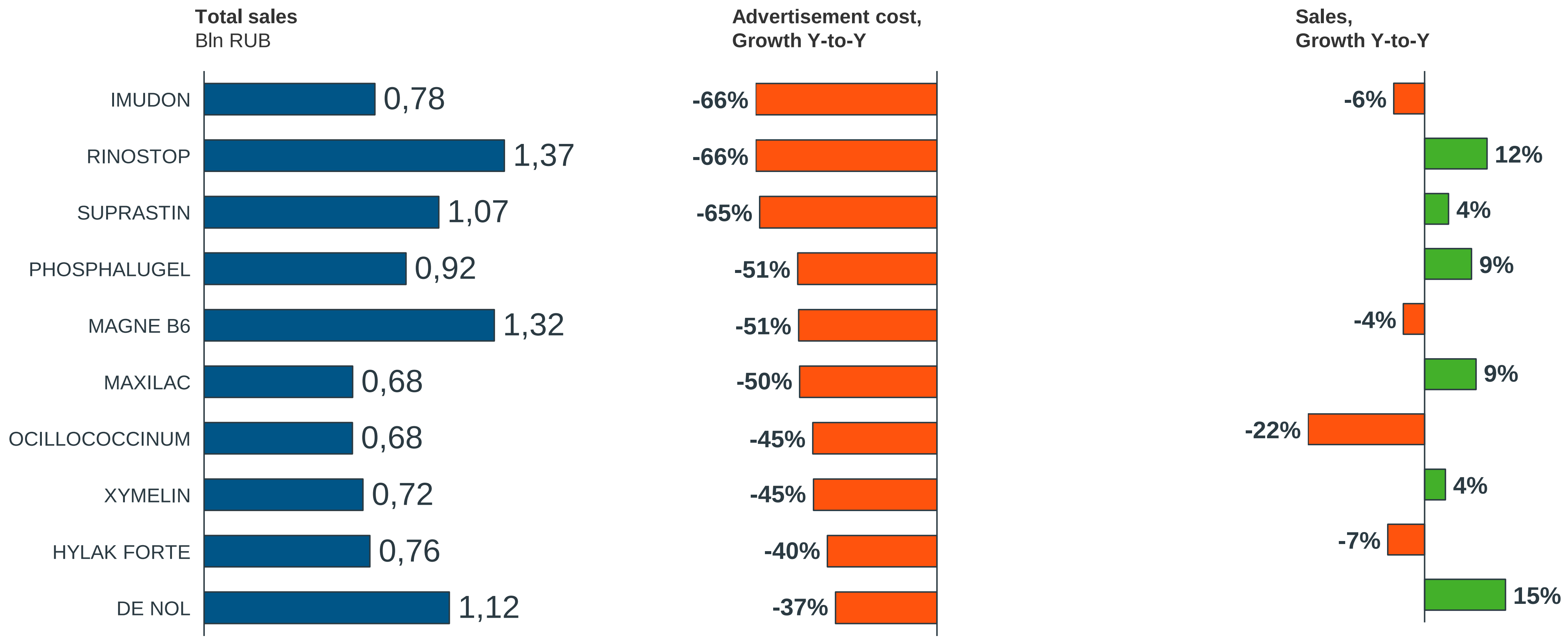

Source: IQVIA databases. Retail, Public, DLO, RLO (excluding food supplements and diagnostic agents), TRD Prices

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




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-July 2018




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

# Most of the largest pharmacy chains showed an increase in sales in H1 2018

*Top-10 of the largest pharmacy chains and associations based on drug sales in H1 2018*

| Company name | Market share of the pharmacy chain[7], % | Number of shops as of July 1, 2018, units. | Average spending by consumer, rub. | Relative sales value[8] | Sales growth[9] |
|---|---|---|---|---|---|
| ASNA | 13,3% | 8,461 | 314 | 2.4 | 50% |
| Rigla[1] | 5,6% | 2,201 | 508 | 1.0 | 27% |
| Erkapharm[2] | 5,3% | 1,222 | | 1.0 | 51% |
| Pharmacy chain 36,6[3] | 4,0% | 1,341 | | 0.7 | -18% |
| Planeta Zdorovya[4] | 3,1% | 1,560 | | 0.6 | 17% |
| Melodia Zdorovya[5] | 3,1% | 2,181 | 360 | 0.6 | 122% |
| Neo-Pharm | 3,0% | 522 | 651 | 0.5 | 31% |
| IRIS[6] | 2,5% | 1,344 | | 0.5 | 15% |
| April | 2,5% | 1,160 | 431 | 0.4 | 40% |
| Pharmland | 2,1% | 1,052 | 485 | 0.4 | 28% |

[1] - including O3, Givika и DOMpharma; [2] – including Ozerki, Doctor Stoletov, Raduga; [3] - including AVE Group; Gorzdrav; A5 Group; [4] - Expert review; [5] - including1511 partners' pharmacies; [6] - including Fakmakoleika, Fakmakoleika 24, Helmi, Tvoi Doctor, Zdes Apteka, Farmani, Aptechestvo, Stavorapolskie gorodskie apteki; [7] - share of the pharmacy network in the retail commercial market of drugs in the 1Q-2Q 2018; [8] – relative to the leading audited company; [9] – sales growth in the 1Q-2Q 2018/1Q 2017

Source: IQVIA analysis

# Most of the largest distributers showed an increase in direct sales in 1Q-2Q 2018

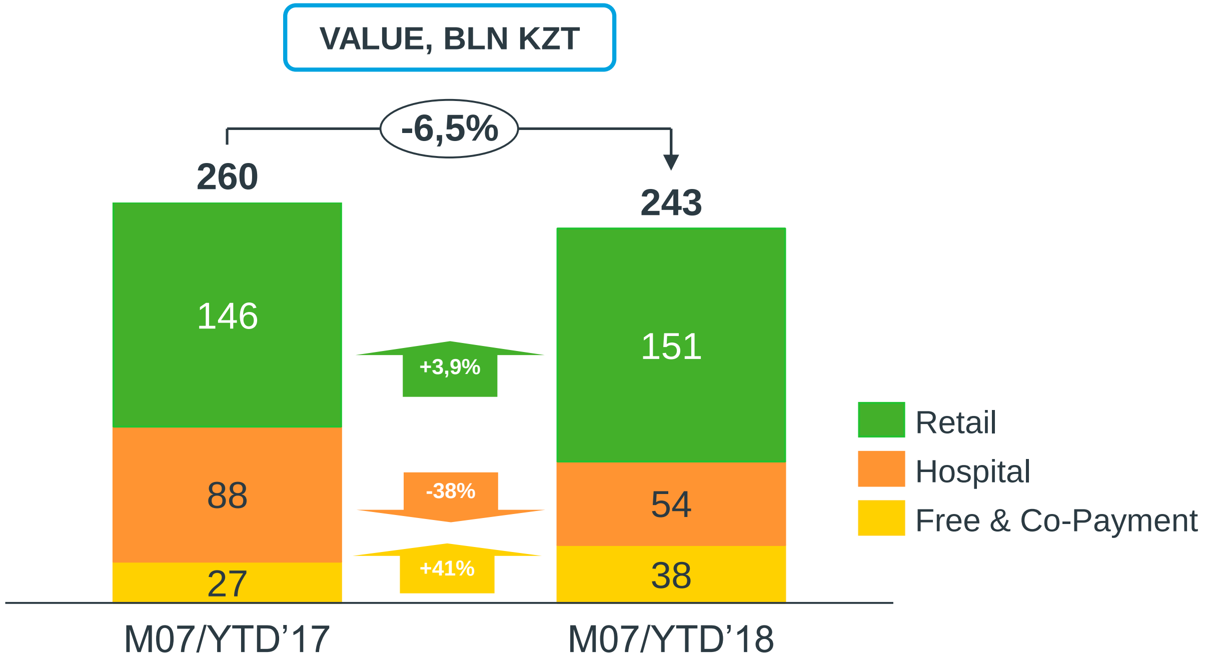
*Top-10 of the largest distributors in the market of direct drug sales in H1 2018*

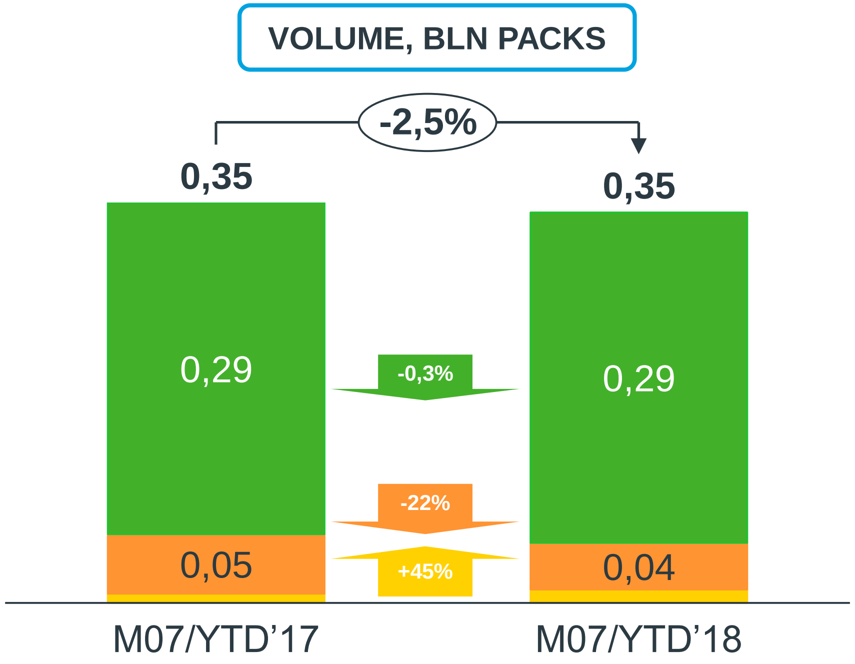
| Distributer | Share in the market of direct drug sales,% | Increase in direct sales of drugs, H1 2018/ H1 2017 | Presence of own pharmacy network | Geographical coverage (number of FD) |
|---|---|---|---|---|
| Protek | 16,9% | -4,9% | «Rigla» | 8 |
| Katren | 16,2% | -0,3% | «Melodia Zdorovya» | 8 |
| Puls | 15,8% | 17,4% | «Apteka Forte» | 8 |
| Pharmkomplect | 4,7% | 20,4% | «Farmani» | 6 |
| R-Pharm | 4,5% | -6,5% | | 6 |
| Grand Capital | 4,3% | 61,6% | «Serdse Rossii» | 6 |
| BSS | 4,0% | 16,3% | «Aloe» | 7 |
| Profitmed | 3,5% | 81,6% | | 2 |
| IRVIN 2 | 2,0% | 12,1% | | 1 |
| Avesta Pharmacy | 1,8% | 96,2% | | 2 |

Source: IQVIA analysis

# Kazakhstan pharma market growth in January-July 2018

*Market decreased by 6,5% in value and by 2,5% in volume*

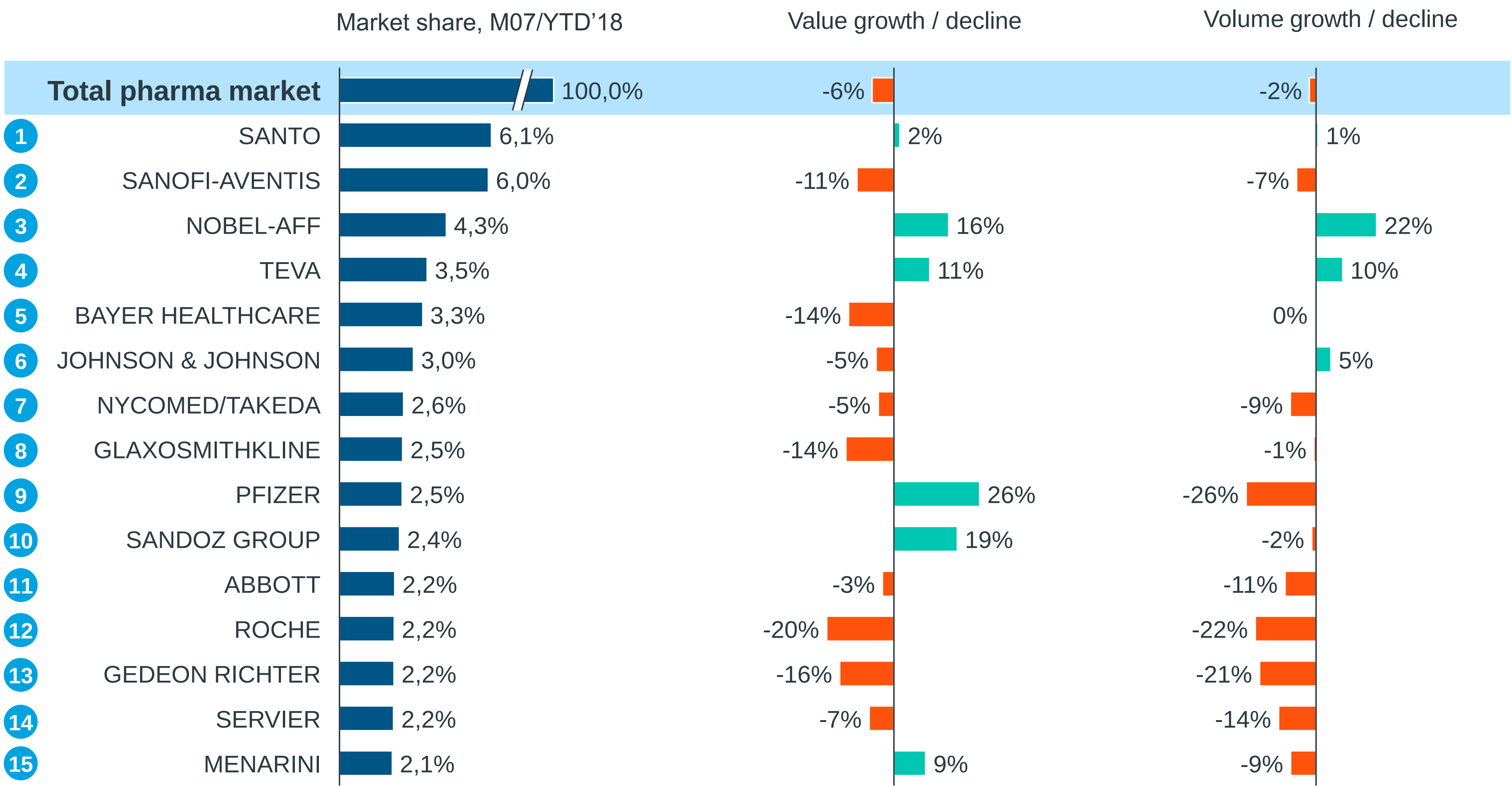



| Indicator | KZT | USD | EUR | PACKS |
|---|---|---|---|---|
| Value M07/YTD 2018, Bln. | 243 | 0,7 | 0,6 | 0,35 |
| Growth M07/YTD,% | -6,5% | -9,3% | -17% | -2,5% |

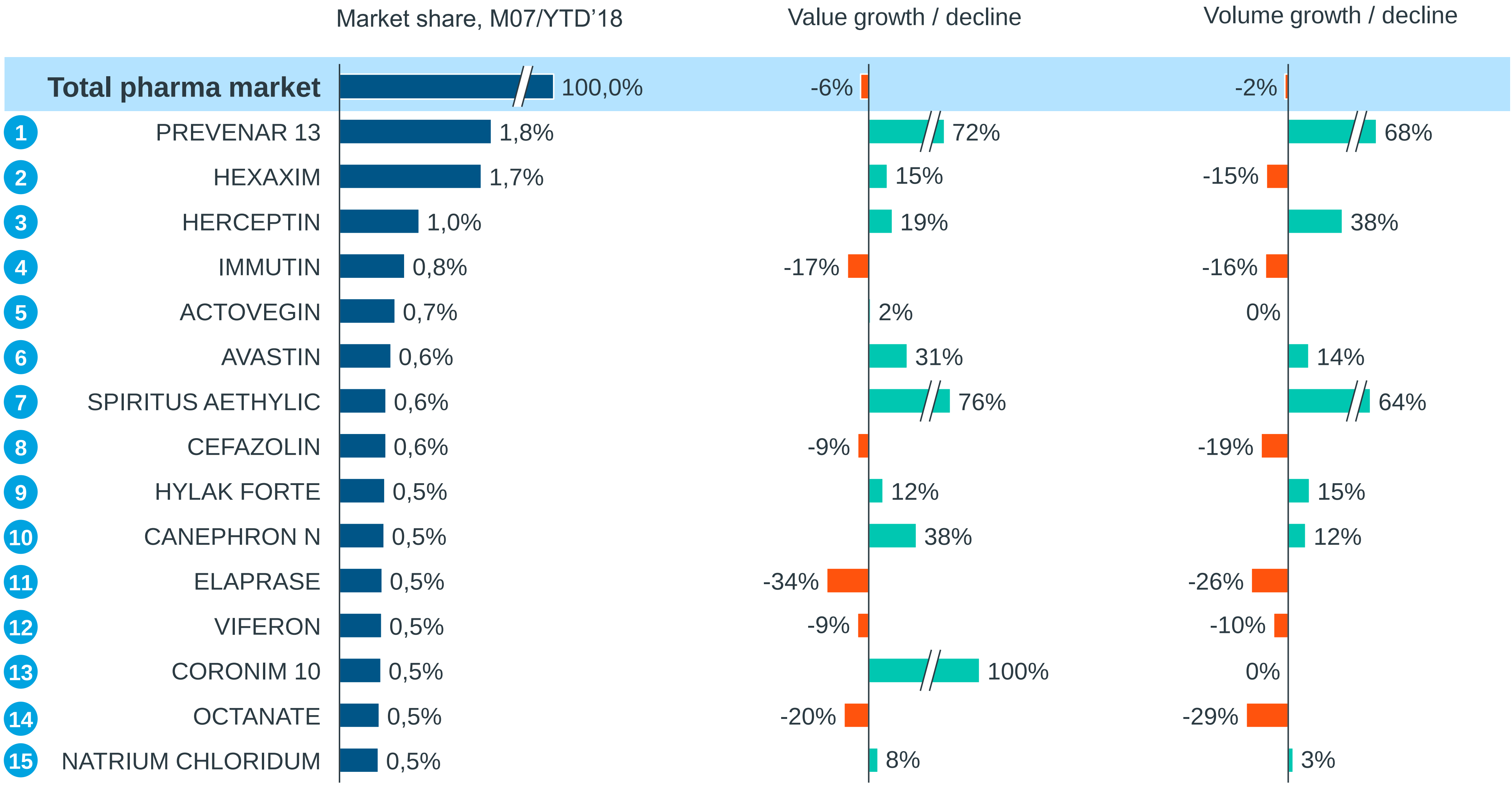
Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices

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




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

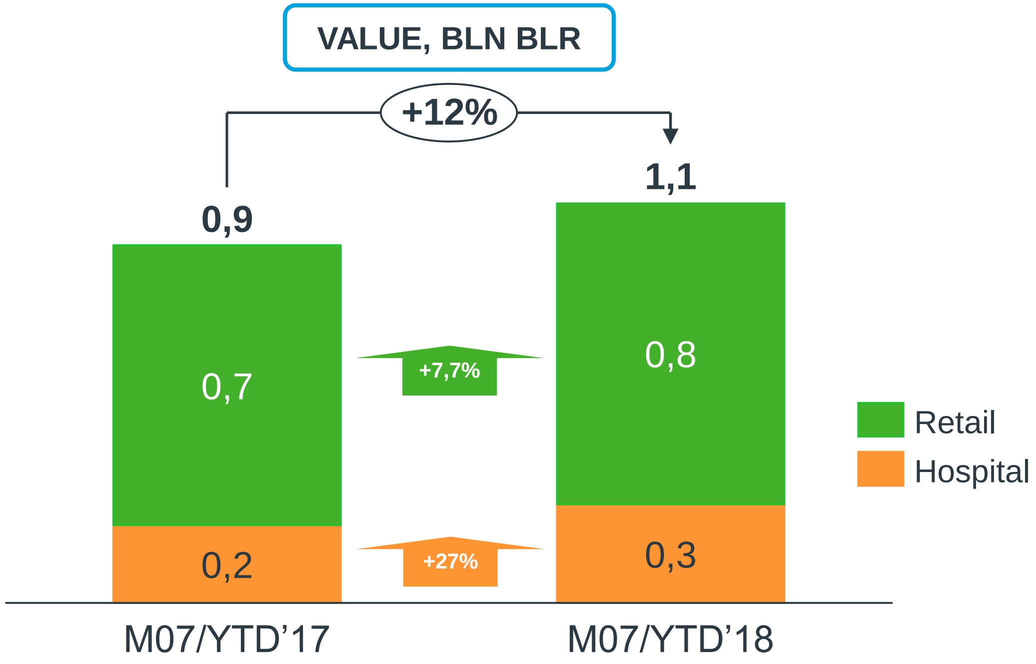
# TOP-15 brands on Kazakhstan market, January-July 2018

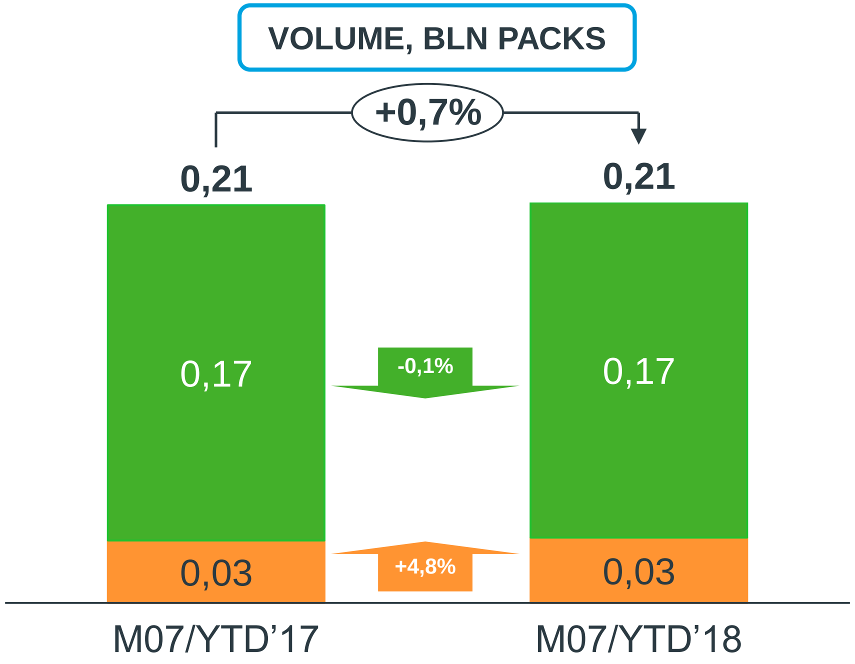



Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices

# Belarus pharma market growth in January-July 2018

*Market grew by 12% in value and by 0,7% in volume*




| Indicator | BLR | USD | EUR | PACKS |
|---|---|---|---|---|
| Value M07/YTD 2018, Bln. | 1,06 | 0,53 | 0,44 | 0,21 |
| Growth M07/YTD,% | ▲ +12% | ▲ +7,2% | ▼ -3,2% | ▲ +0,7% |

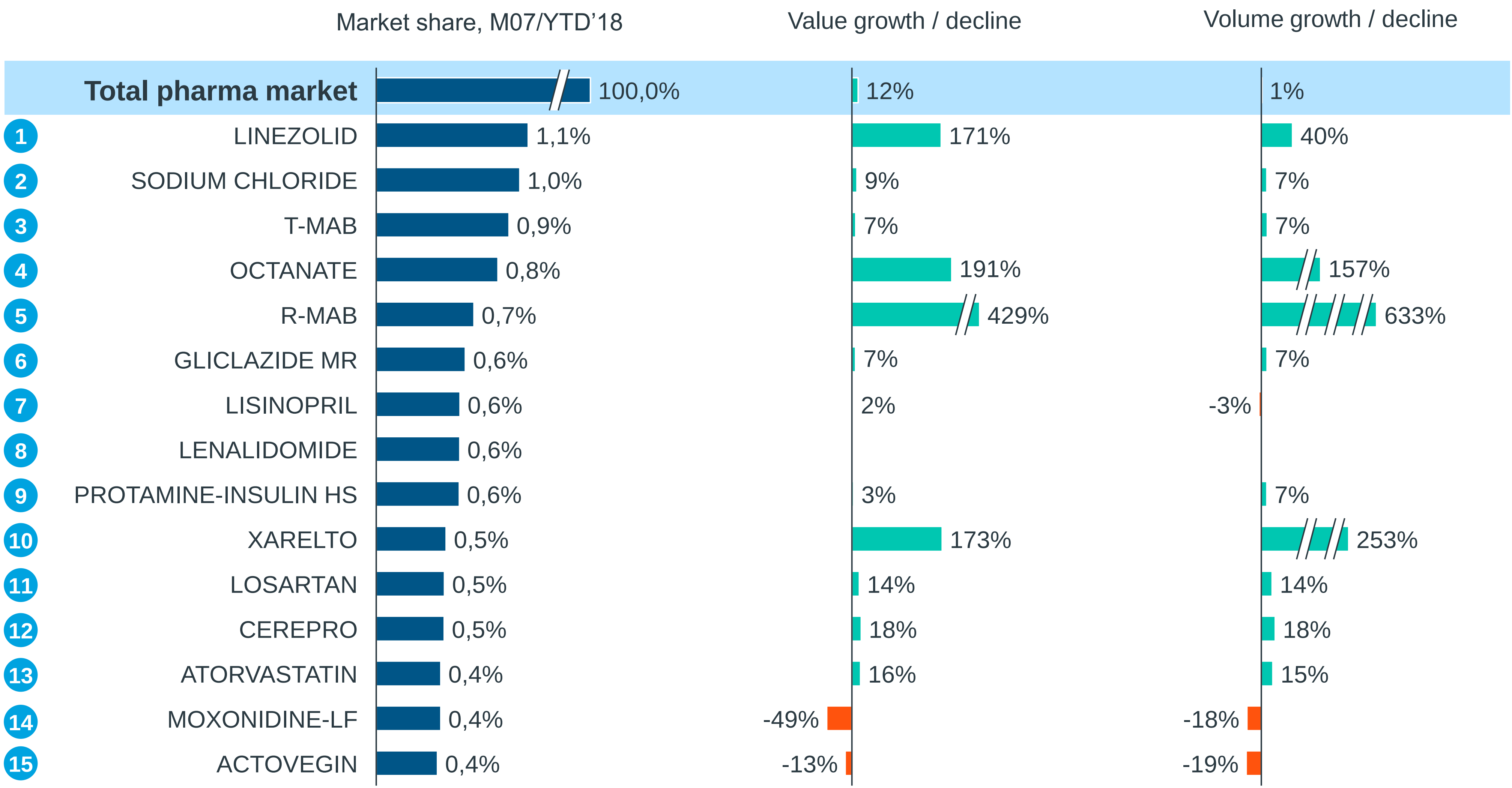
Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices

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

| # | Corporation | Market share, M07/YTD'18 | Value growth / decline | Volume growth / decline |
|---|---|---|---|---|
| | **Total pharma market** | 100,0% | 12% | 1% |
| 1 | BELMEDPREPARATY RUE | 10,2% | 7% | 1% |
| 2 | BORISOV ZMP | 7,4% | 9% | -2% |
| 3 | LEKPHARM JLLC | 5,1% | -1% | 3% |
| 4 | NOVARTIS | 4,1% | 28% | 12% |
| 5 | PHARMLAND JV LTD | 3,3% | 8% | 12% |
| 6 | BAYER HEALTHCARE | 2,7% | 21% | -5% |
| 7 | SANOFI | 2,6% | 4% | -12% |
| 8 | PHARMTECHNOLOGY LTD | 2,6% | 1% | -8% |
| 9 | GEDEON RICHTER | 2,5% | 3% | 6% |
| 10 | GSK | 2,4% | 20% | 23% |
| 11 | BERLIN-CH/MENARINI | 2,4% | 16% | 6% |
| 12 | NATIVITA JLLC | 2,3% | 97% | 76% |
| 13 | MINSKINTERCAPS MRUE | 2,2% | 6% | -5% |
| 14 | KRKA | 2,0% | 25% | 32% |
| 15 | NESVIZH PLANT RUE | 1,7% | 10% | 0% |

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

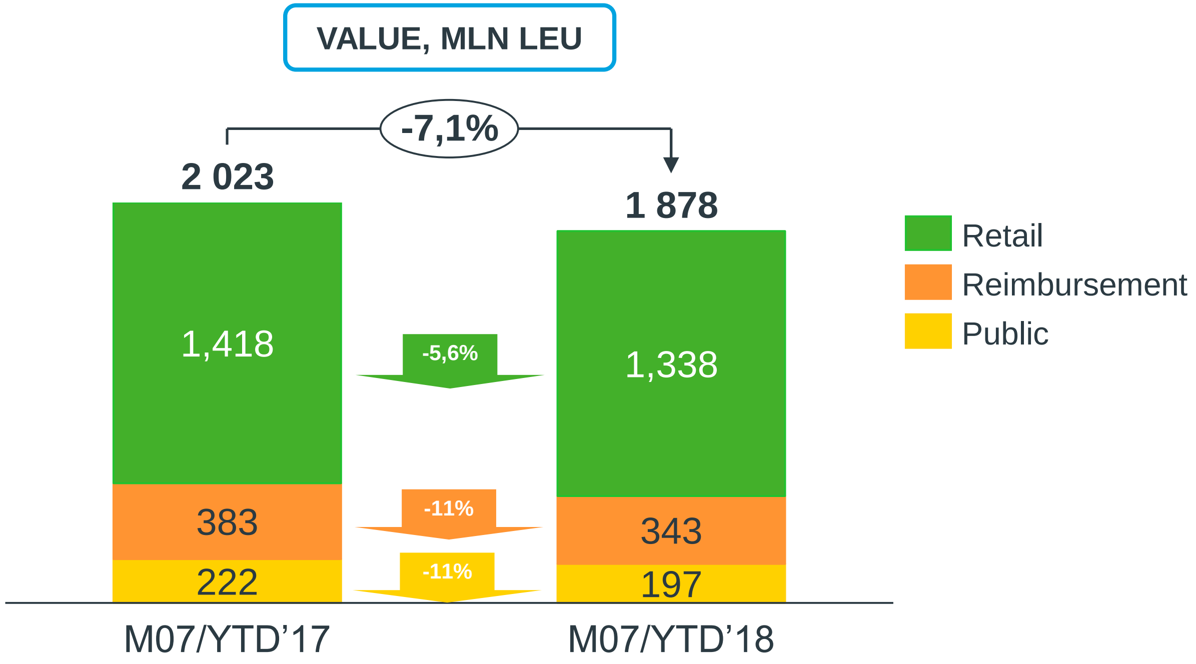
# TOP-15 brands on Belarus market, January-July 2018

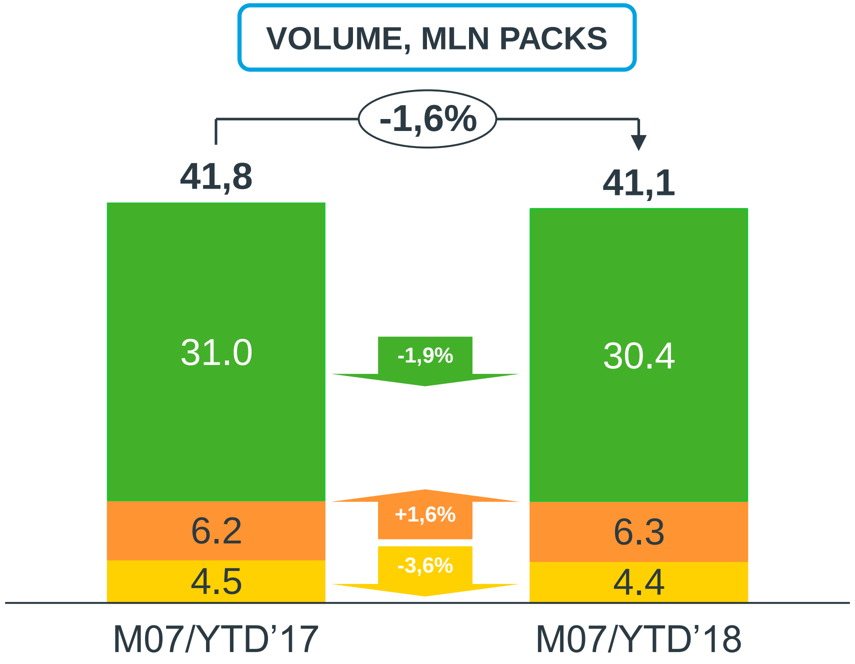



Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices

# Moldova pharma market growth in January-July 2018

*Market decreased by 7,1% in value and by 1,6% in volume*




| Indicator | LEU | USD | EUR | PACKS |
|---|---|---|---|---|
| Value M07/YTD 2018, Mln. | 1 878 | 112,7 | 93,2 | 41,1 |
| Growth M07/YTD,% | ▼ -7,1% | ▲ +6,8% | ▼ -4,0% | ▼ -1,6% |

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

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

| # | Corporation | Market share, M07/YTD'18 | Value growth / decline | Volume growth / decline |
|---|---|---|---|---|
| | **Total pharma market** | 100,0% | -7% | -2% |
| 1 | KRKA | 7,8% | -1% | 12% |
| 2 | GEDEON RICHTER | 7,7% | 0% | 14% |
| 3 | BERLIN-CH/MENARINI | 6,2% | -16% | -8% |
| 4 | GSK | 4,2% | 4% | 19% |
| 5 | NOVARTIS | 3,6% | -25% | -3% |
| 6 | TAKEDA | 2,9% | -1% | 33% |
| 7 | SANOFI | 2,6% | 3% | 12% |
| 8 | NOVO NORDISK | 2,5% | -9% | 4% |
| 9 | WORLD MEDICINE | 2,3% | -12% | 7% |
| 10 | EGIS | 2,2% | -10% | 13% |
| 11 | ACINO PHARMA AG | 2,0% | -10% | 9% |
| 12 | BALKAN PHARMA | 1,9% | 17% | 28% |
| 13 | GRINDEX | 1,8% | 4% | 8% |
| 14 | BILIM PHARMACEUTICALS | 1,8% | -29% | -6% |
| 15 | ABBVIE | 1,4% | 4 506% | 1 702% |

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

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

| # | Brand | Market share, M07/YTD'18 | Value growth / decline | Volume growth / decline |
|---|---|---|---|---|
| | **Total pharma market** | 100,0% | -7% | -2% |
| 1 | CARDIOMAGNYL | 1,5% | 28% | 36% |
| 2 | DIROTON | 1,4% | 0% | 11% |
| 3 | PROTAPHANE HM | 1,3% | -17% | -2% |
| 4 | AMPRIL | 1,2% | -5% | 3% |
| 5 | VYLVIO | 1,2% | | |
| 6 | RAWEL SR | 1,1% | -10% | 6% |
| 7 | LORISTA | 0,9% | 40% | 42% |
| 8 | SODIUM CHLORIDE | 0,9% | -21% | -2% |
| 9 | CONCOR | 0,9% | -14% | 5% |
| 10 | GLUCOPHAGE | 0,8% | -8% | 13% |
| 11 | IMIPENEM & CILASTATIN | 0,8% | | |
| 12 | SENTOR | 0,7% | -1% | 20% |
| 13 | REBIF | 0,7% | 8% | 26% |
| 14 | IMPAMID SR | 0,7% | 10% | 27% |
| 15 | ZINNAT | 0,7% | -7% | 12% |

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

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