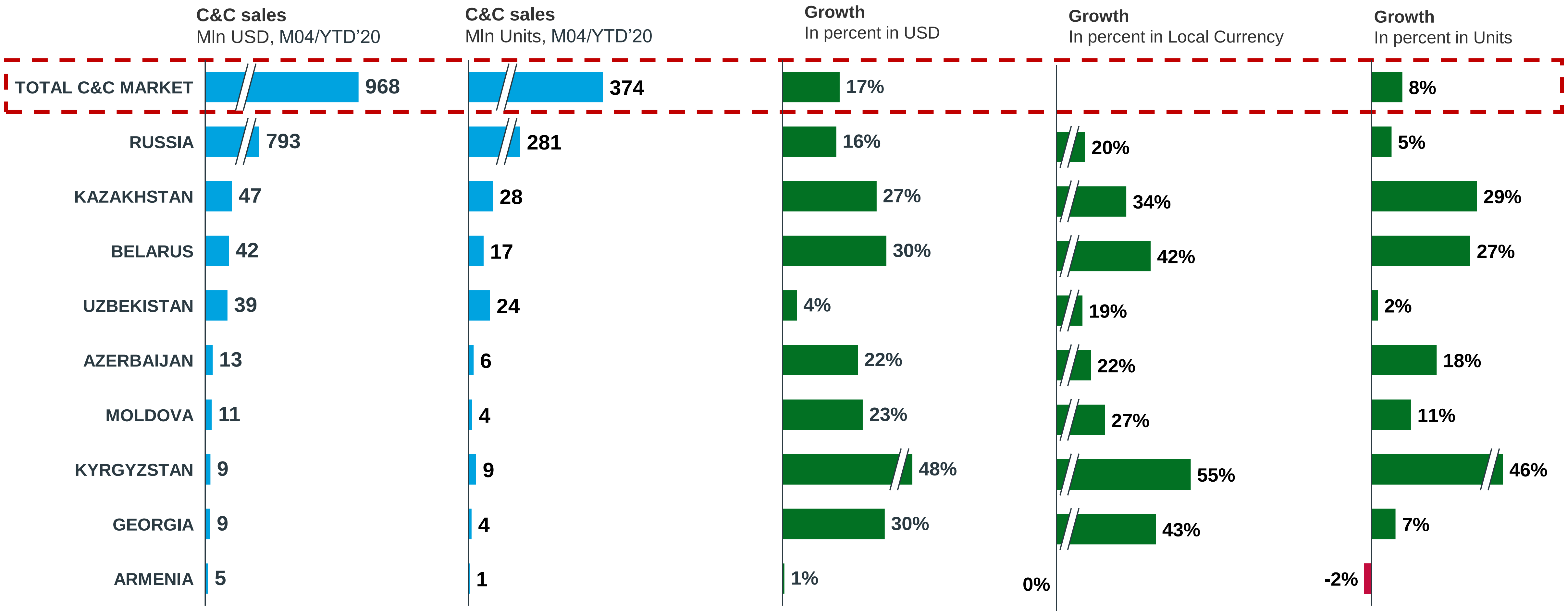
Facts from IQVIA

M04 2020

EAEU & CIS, Russia Cough&Cold category in January-April 2020, Value in Mln. USD and Units

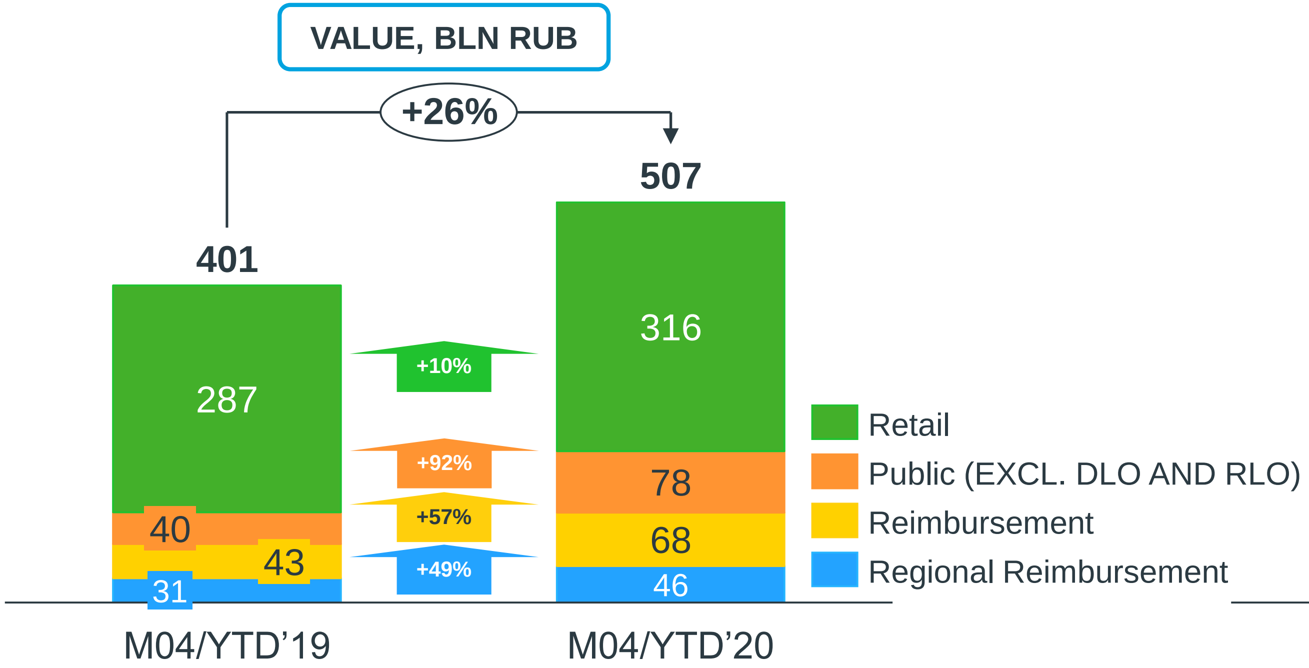
C&C increases by 17% in USD and decreased by 8% in volume

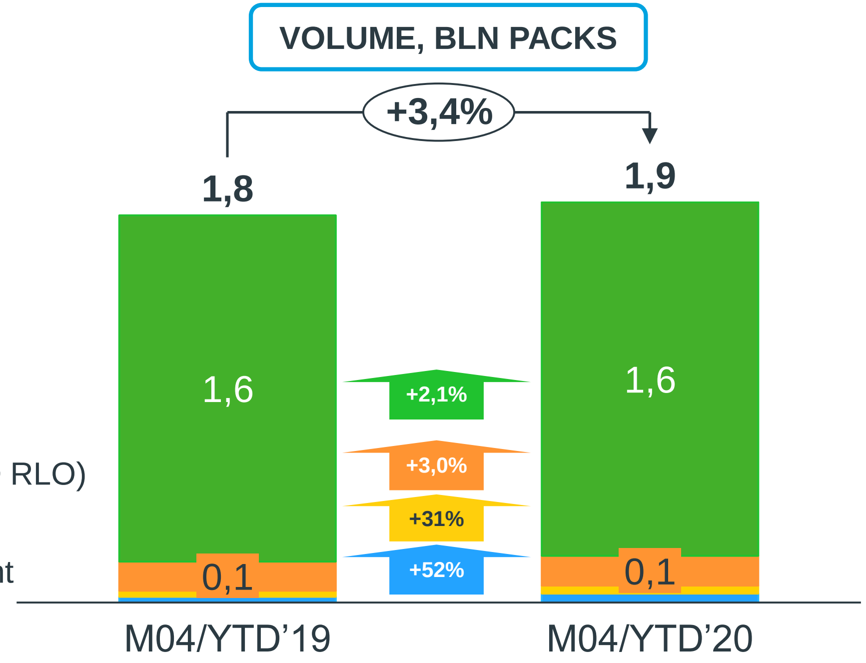


Source: IQVIA databases: Retail (TRD Prices)
Cough&Cold Market: EphMRA3: J05B,L03A,L03B,R01A,R02A,R05A,R05C,R05D

Russian pharma market growth in January-April 2020

Market grew by 26% in value and by 3,4% in volume



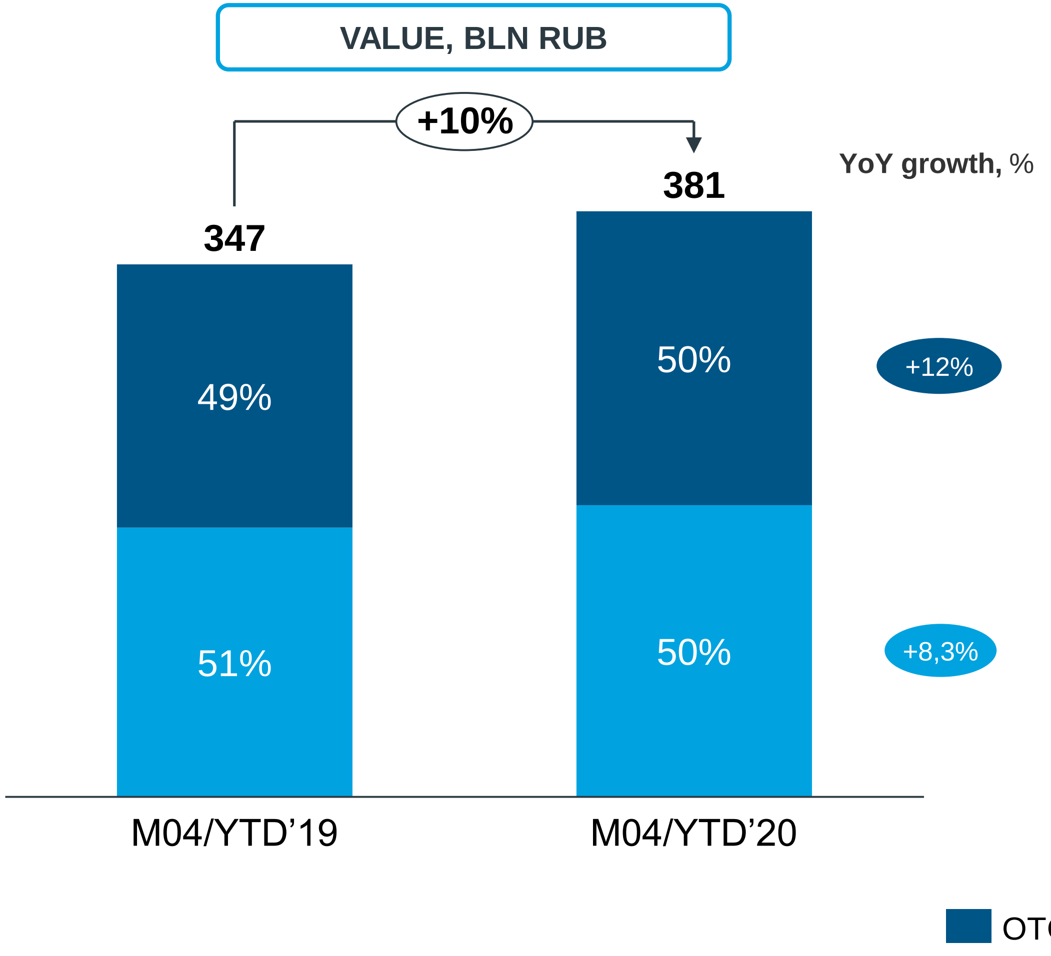


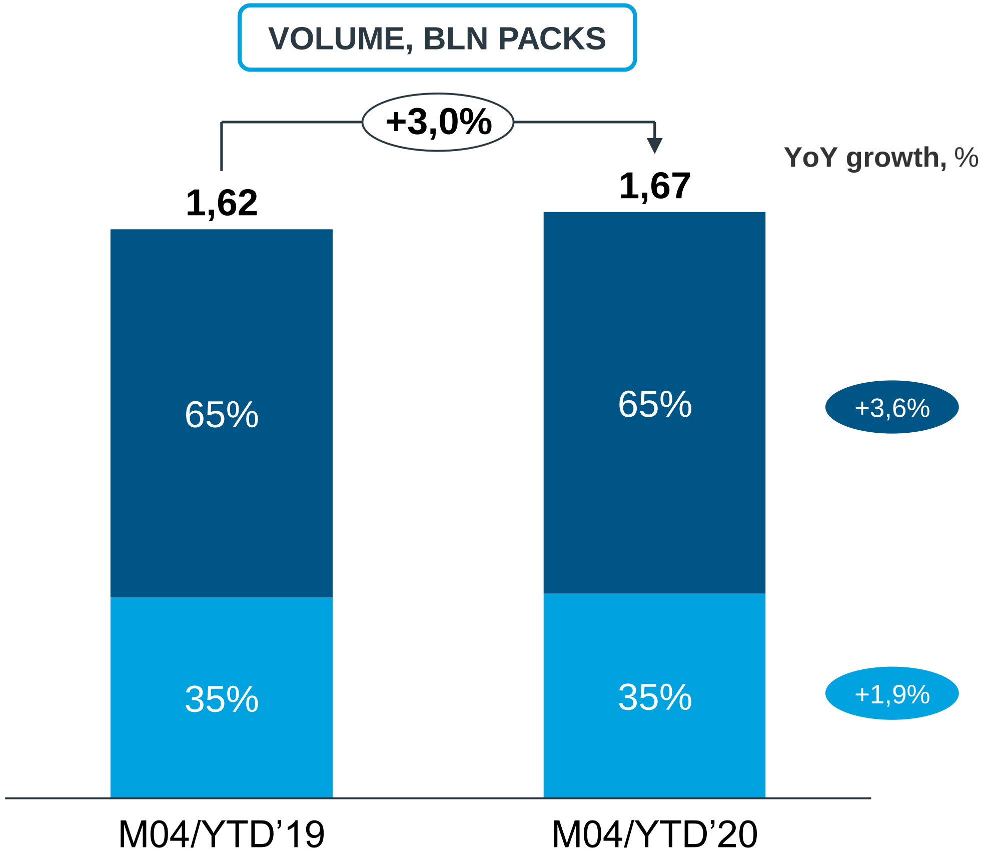
Indicator	RUB	USD	EUR	PACKS
Value M04/YTD'20, Bln.	507	7,4	6,7	1,9
Growth M04/YTD'20%	▲ 26%	▲ 21%	▲ 24%	▲ 3,4%

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

Russian pharma market growth in January-April 2020

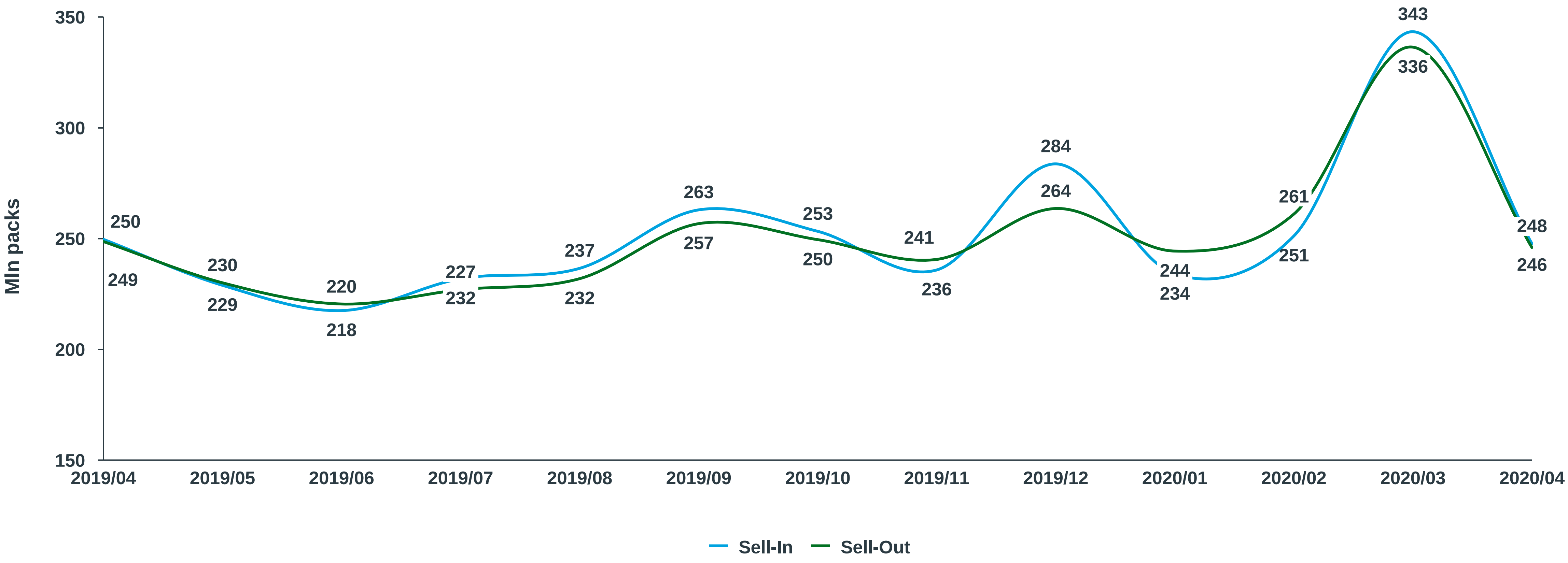
Retail Sell-Out: Market grew by 10% in value and by 3% in volume





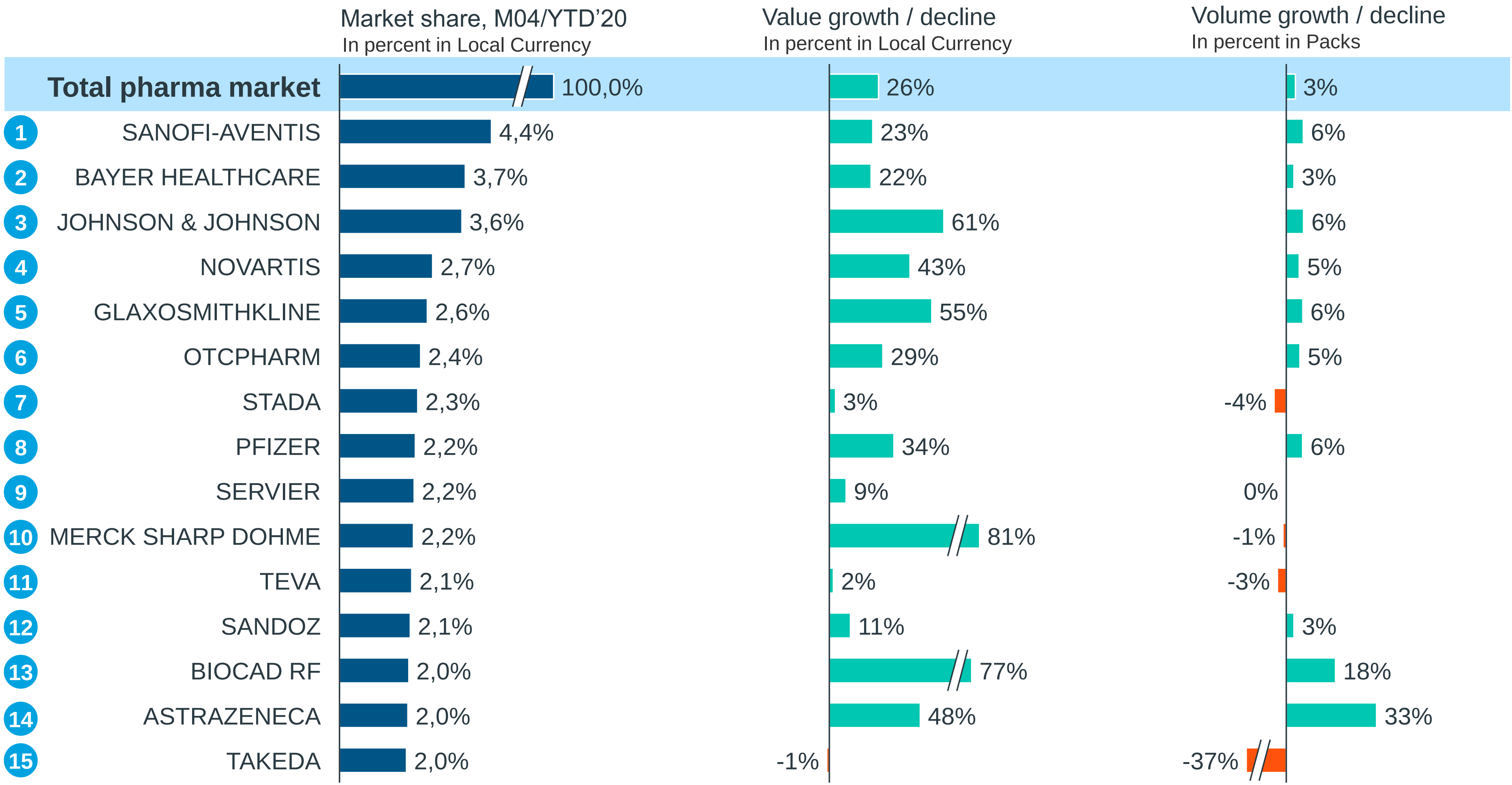
Source: Pharmatrend (excluding food supplements and diagnostic agents), FIN Prices

Sell-In vs Sell-Out, OTC registered drugs



Source: Retail Audit and Pharmatrend. OTC registered drugs

TOP-15 corporations on Russian market, January-April 2020



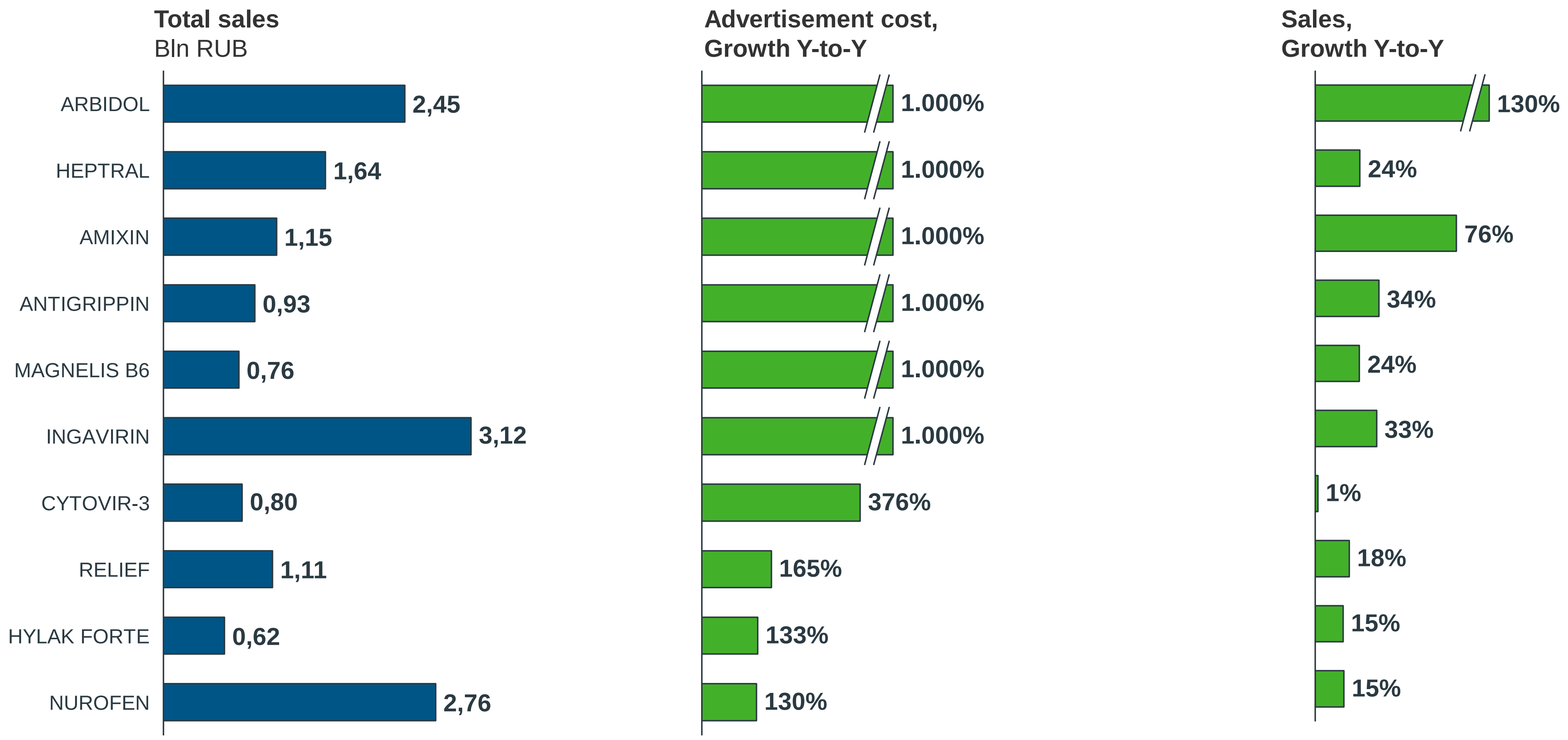
Source: IQVIA databases. Retail, Public, DLO, RLO (excluding food supplements and diagnostic agents), TRD Prices

TOP-15 brands on Russian market, January-April 2020

#	Brand	Market share, M04/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%	26%	3%
1	REVLIMIDE	1,1%	113%	112%
2	XARELTO	1,0%	58%	48%
3	TIVICAY	0,7%	1 177%	1 644%
4	TOUJEO SOLOSTAR	0,6%	40%	37%
5	ELIZARIA	0,6%	357%	356%
6	KEYTRUDA	0,6%	166%	164%
7	INGAVIRIN	0,6%	49%	8%
8	OPDIVO	0,6%	150%	148%
9	MIRAMISTIN	0,5%	60%	39%
10	DARZALEX	0,5%	2 977%	7 637%
11	AVEGRA BIOCAD	0,4%	164%	71%
12	ELIQUIS	0,4%	88%	95%
13	IMBRUVICA	0,4%	43%	43%
14	PRADAXA	0,4%	61%	55%
15	DETRALEX	0,4%	7%	-2%

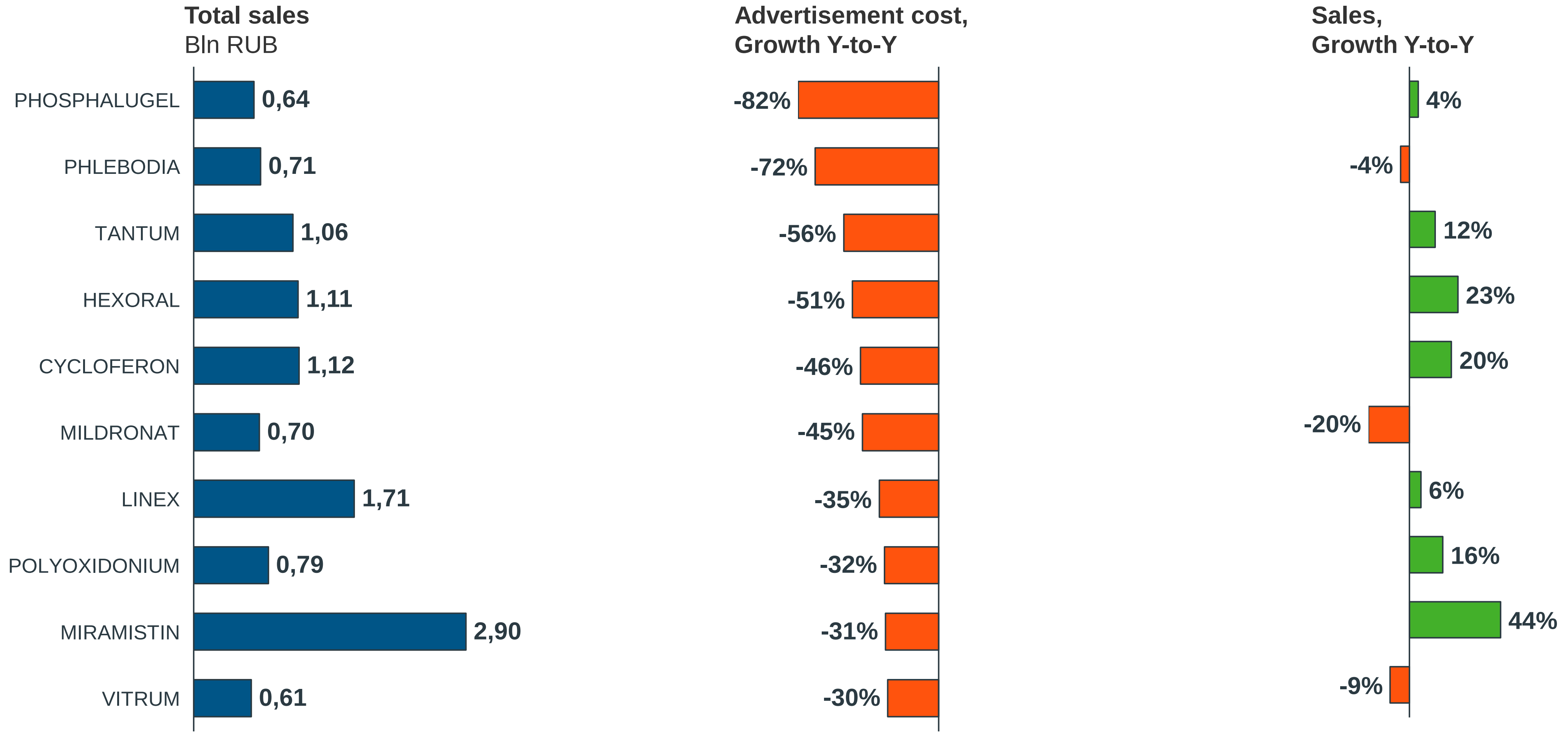
Source: IQVIA databases. Retail, Public, DLO, RLO (excluding food supplements and diagnostic agents), TRD Prices

TOP-10 products by growth in advertisement investments in January-April 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-April 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 pharmacy chains and pharmacy associations by sales of drugs (excluding reimbursement drugs supply) 1Q 2020

#	Category*	Regions	Pharmacy Chain / Pharmacy Association	Number of stores (1 April 2020)	Market share of pharmacy chain on the retail market, drugs only, 1Q 2020, %	Change in drug sales 1Q 2020 vs. 1Q 2019, %	The indicator of the relative sales of drugs, 1Q 2020 *(relative to the leading audited company)*	Average check, rub.	The rank of gross sales 1Q 2020 *(relative to the leading audited company)*
1	Fed.	83	ASNA	10 733	12,26%	15,4%	2,039	324	-
2	Fed.	54	Rigla[1]	2 905	6,0%	27,3%	1,000	560	1
3	Fed.	36	Erkafarm[2]	1 131	4,0%	6,5%	0,657	-	2
5	Intr.	10	Neo-farm	737	3,81%	39,0%	0,633	727	4
4	Fed.	8	Pharmacy chains 36,6**[4]	1 397	3,63%	11,1%	0,604	816	3
6	Fed.	36	Vita (Samara)	1 787	3,14%	16,4%	0,522	487	5
7	Fed.	46	Planeta zdorov'ya**	1 736	3,09%	9,9%	0,513	-	6
8	Fed.	47	April	1 411	3,01%	8,6%	0,501	524	8
9	Fed.	27	Iris[3]	1 675	3,0%	1,9%	0,497	-	7
10	Fed.	8	Farmland	1 282	2,17%	21,3%	0,360	513	9
Total:				**24 794**	**44,1%**	**15,7%**			

*Fed. = federal, Intr. = interregional, Reg. = regional
**Expert assessment
1 Including OZ, Zhivika and DOMfarma
2 Including Doktor Stoletov, Ozerki, Raduga, Pervaya pomoshch', Ladushka, Khoroshaya apteka, Vashe zdorov'ye, Farmvolga, Narodnaya apteka, Novaya apteka, MosApteka, Ozerki u doma, Samson-pharma
3 Including Fakmakopeyka, Farmakopeyka 24, Khelmi, Tvoy doktor, Zdes' apteka, Farmani, Aptechestvo, Stavropol'skiye gorodskiye apteki, Novuyu apteka and Minitsen
4 Including 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 reimbursement drugs supply) 1Q 2020

#	Pharmacy Chain	The indicator of the relative gross sales of drugs, 1Q 2020	Change in gross sales 1Q 2020 vs. 1Q 2019, %
1	Rigla[1]	1,000	26,6%
2	Erkafarm[2]	0,654	6,5%
3	Pharmacy chain 36,6*[4]	0,633	24,8%
4	Neo-farm	0,587	37,4%
5	Vita (Samara)	0,495	14,5%
6	Planeta zdorov'ya*	0,490	9,6%
7	Iris[3]	0,489	13,7%
8	April	0,484	7,4%
9	Farmland	0,356	22,3%
10	Melodiya zdorov’ya[5]	0,270	41,9%

*Expert assessment
1 Including OZ, Zhivika and DOMfarma
2 Including Doktor Stoletov, Ozerki, Raduga, Pervaya pomoshch', Ladushka, Khoroshaya apteka, Vashe zdorov'ye, Farmvolga, Narodnaya apteka, Novaya apteka, MosApteka, Ozerki u doma, Samson-pharma
3 Including Fakmakopeyka, Farmakopeyka 24, Khelmi, Tvoy doktor, Zdes' apteka, Farmani, Aptechestvo, Stavropol'skiye gorodskiye apteki, Novuyu apteka and Minitsen
4 Including AVE Group; Gorzdrav; A5 Group and Kalina-Pharm
5 Including 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) 1Q 2020

#	Pharmacy Association / Service Platform	Head Office	Number of stores (1 April 2020)	Market share of pharmacy association on the retail market, drugs only, 1Q 2020, %	Change of drug sales 1Q 2020 vs. 1Q 2019, %	The indicator of the relative sales of drugs, 1Q 2020
1	ASNA	Moscow	10 733	12,26%	15,4%	1,000
2	ProApteka	Moscow	5 810	7,28%	28,1%	0,505
3	MFU[1]	St. Petersburg	4 411	6,37%	101,0%	0,508
4	Sozvezdiye	Moscow	3 613	2,79%	112,3%	0,218
5	VESNA[2]	St. Petersburg	1 456	1,48%	30,7%	0,124
6	Zdravcity	Moscow	14 549	0,22%	118,7%	0,021

1 MedPharm Unity
2 All-Russian United Commonwealth of Independent Drugstores

Source: based on data from pharmacy associations and service platform participating in the rating

TOP-10 distributors on the market of gross sales, 1Q 2020

#	Distributor	Market share in gross sales, %		Change in gross sales 1Q 2020/1Q 2019, %
		1Q 2020	1Q 2019	
1	Pulse	13,0%	12,9%	26,9%
2	Protek	11,3%	12,7%	12,5%
3	Katren	10,8%	12,5%	8,8%
4	R-Pharm	5,0%	3,3%	93,9%
5	Pharmkomplekt	4,8%	4,7%	31,6%
6	FK Grand Kapital	4,1%	3,8%	37,7%
7	BSS	3,0%	3,4%	9,1%
8	Profitmed	2,47%	2,42%	29,2%
9	Asfadis*	2,01%	2,25%	13,1%
10	GDP	1,73%	2,10%	3,6%
Total		58,3%	60,1%	26,6%

*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

IQVIA

TOP-10 distributors on the budget market,1Q 2020

#	Distributor	Distributor Type	Head Office	Relative volume of budget sales, 1Q 2020	Share of budget sales from the gross sales volume, %
1	R-Pharm	National	Moscow	1,000	68%
2	Pharmstandard**	-	-	0,531	-
3	Irvin 2	Regional	Moscow	0,411	97%
4	BSS	National	S.Petersburg	0,366	42%
5	Protek	National	Moscow	0,247	7%
6	Farmimex*	-	-	0,199	-
7	Biotec*	-	-	0,123	-
8	GDP	Interregional	Moscow	0,118	24%
9	Severo-zapad	Interregional	S.Petersburg	0,116	85%
10	Pharmacevt	Interregional	Rostov-on-Don	0,072	51%

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

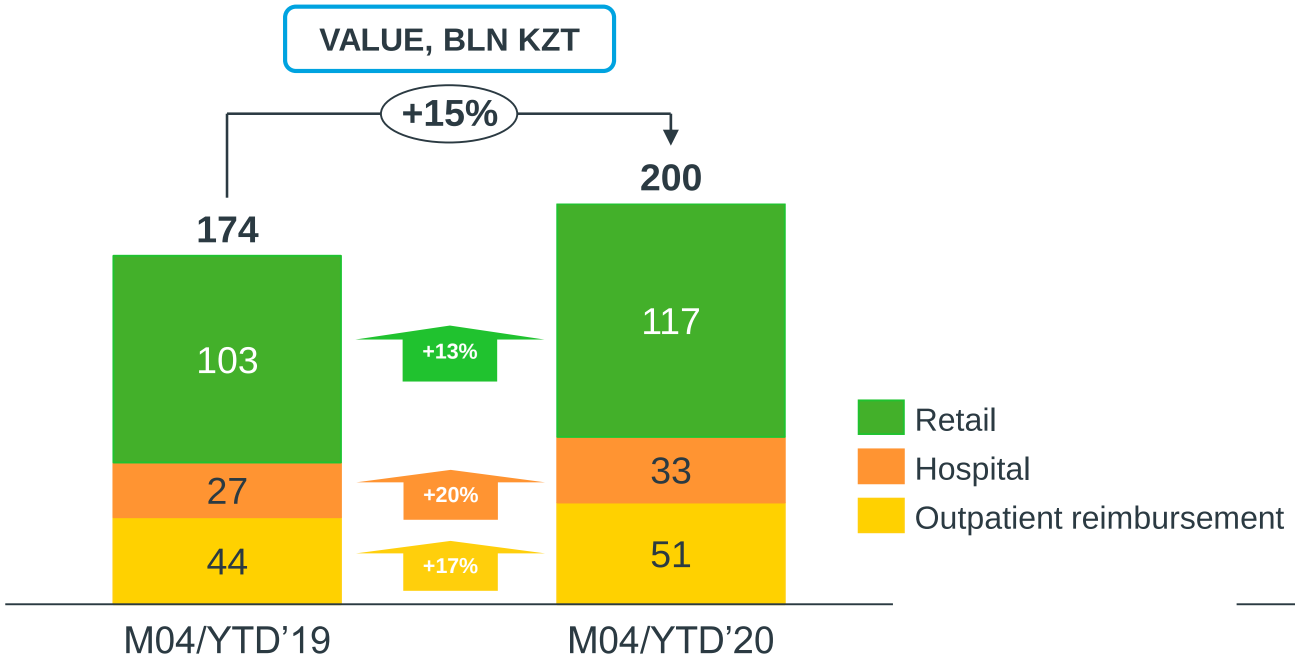
TOP-10 distributors on the market of secondary sales,1Q 2020

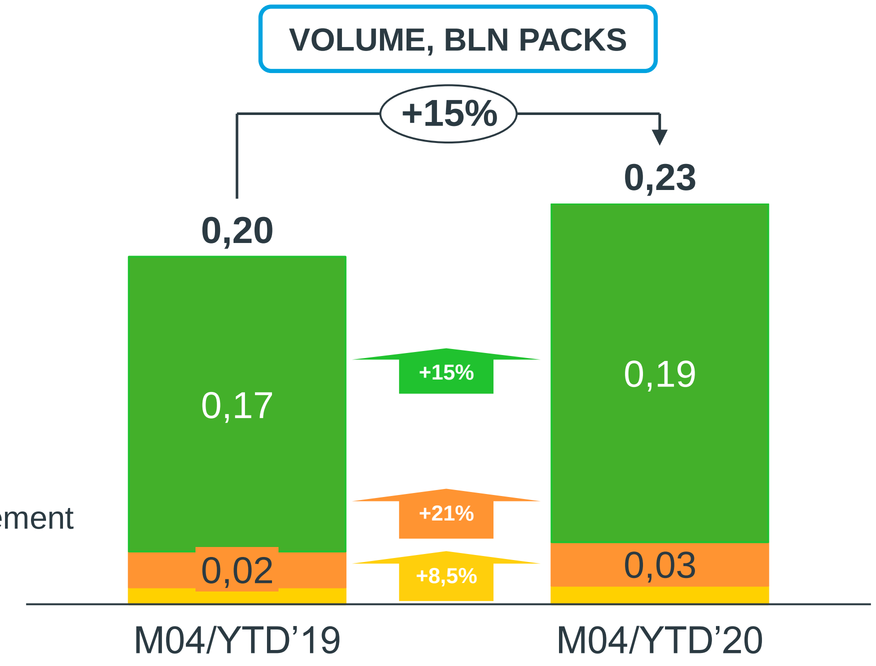
#	Distributor	Distributor Type	Head Office	Relative volume of secondary distribution, 1Q 2020	Share of secondary distribution sales from the gross sales volume, %
1	R-Pharm	National	Moscow	1,000	26%
2	Pharmkomplekt	National	N.Novgorod	0,748	20%
3	Firma Euroservice	Interregional	Moscow	0,655	83%
4	Asfadis*	Interregional	Moscow	0,443	29%
5	Pulse	National	Khimki	0,397	4%
6	Protek	National	Moscow	0,325	4%
7	Pharmservice	Regional	Krasnodar	0,279	80%
8	Katren	National	Novosibirsk	0,237	3%
9	BSS	National	S.Petersburg	0,232	10%
10	FK Grand Kapital	National	Moscow	0,191	6%

*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

Kazakhstan pharma market growth in January-April 2020

Market grew by 15% in value and in volume

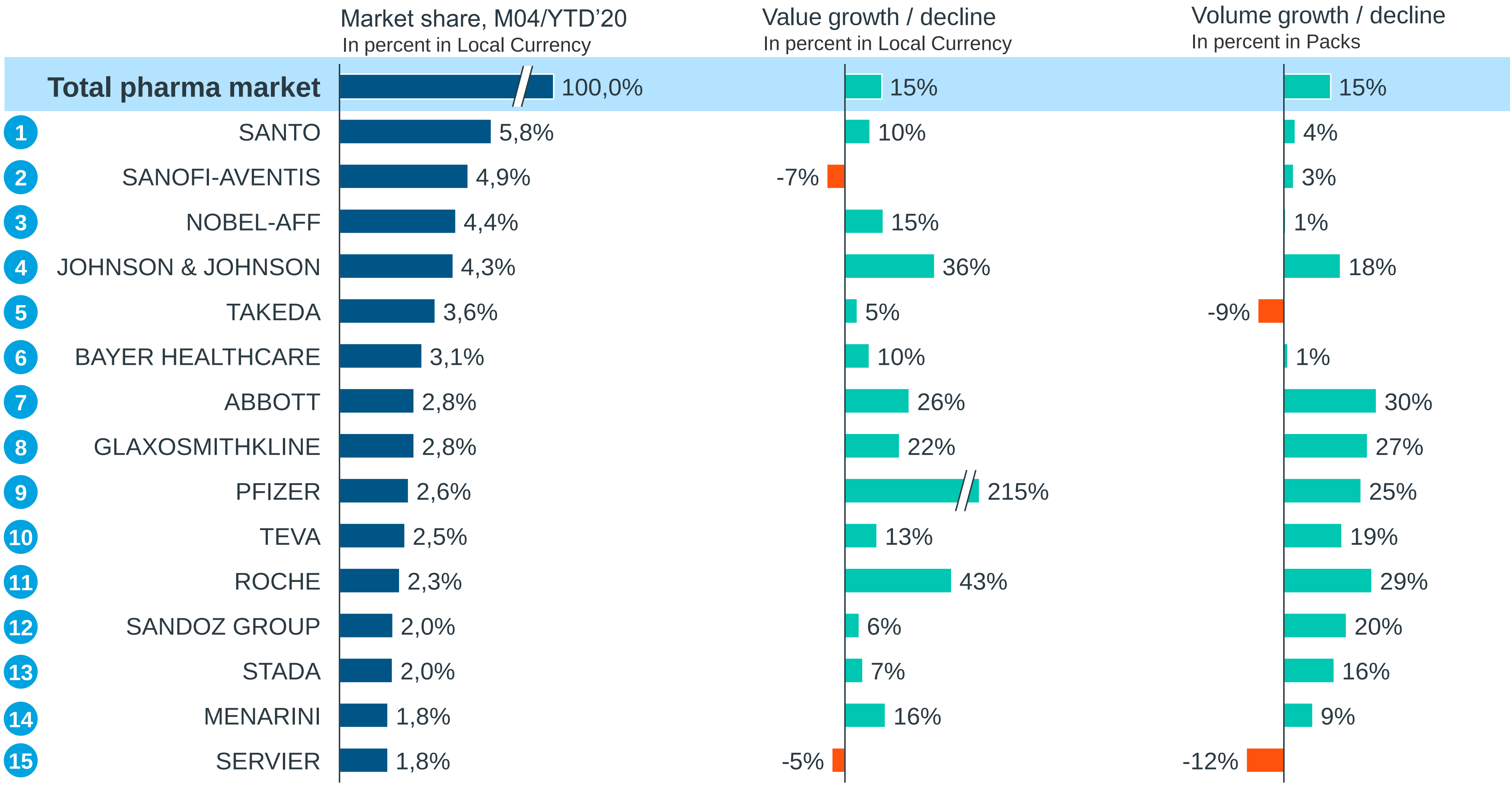




Indicator	KZT	USD	EUR	PACKS
Value M04/YTD'20, Bln.	200	0,50	0,45	0,23
Growth M04/YTD'20%	▲ 15%	▲ 8,5%	▲ 12%	▲ 15%

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

TOP-15 corporations on Kazakhstan market, January-April 2020



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

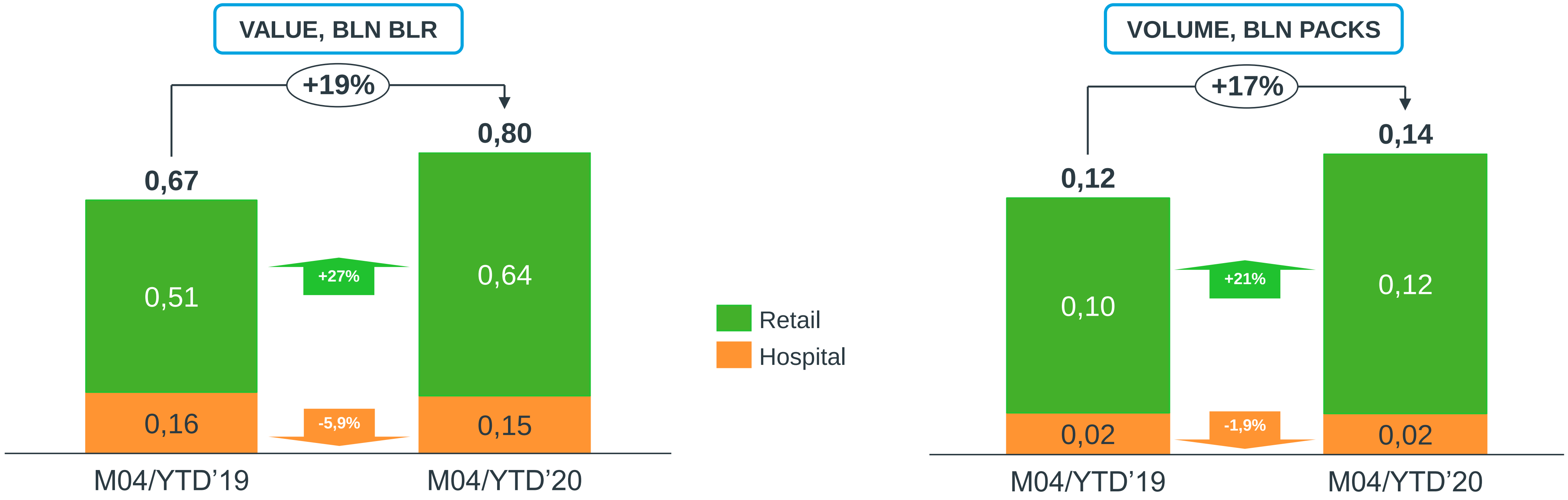
TOP-15 brands on Kazakhstan market, January-April 2020

#	Brand	Market share, M04/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%	15%	15%
1	PREVENAR 13	1,6%	143 737%	58 056%
2	HEXAXIM	1,3%	1%	1%
3	IMMUTIN	1,0%	16%	21%
4	NATRIUM CHLORIDUM	0,8%	110%	91%
5	HERCEPTIN	0,8%	82%	82%
6	SIMPONI	0,8%	40%	39%
7	IMMUNATE	0,8%	33%	20%
8	PHYSIOTENS	0,7%	61%	71%
9	SPIRITUS AETHYLIC	0,7%	55%	30%
10	SUTENT	0,6%	19%	20%
11	CANEPHRON N	0,6%	25%	22%
12	OCTANATE	0,6%	25%	6%
13	METOJECT	0,6%	-18%	-18%
14	ELAPRASE	0,5%	-2%	-3%
15	THERAFLU	0,5%	19%	32%

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

Belarus pharma market growth in January-April 2020

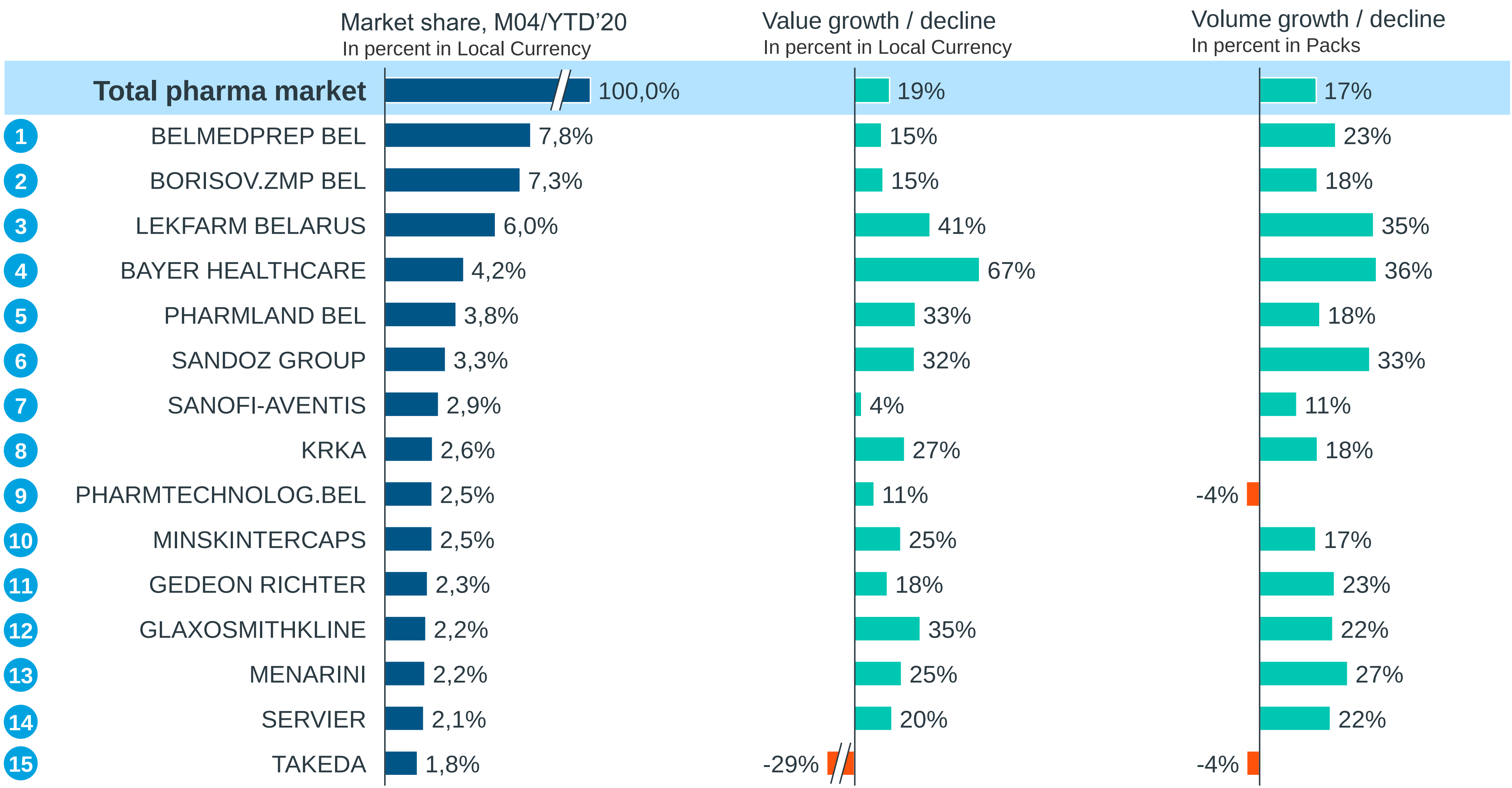
Market grew by 19% in value and by 17% in volume



Indicator	BLR	USD	EUR	PACKS
Value M04/YTD'20, Bln.	0,80	0,35	0,31	0,14
Growth M04/YTD'20%	▲ 19%	▲ 10%	▲ 13%	▲ 17%

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

TOP-15 corporations on Belarus market, January-April 2020



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

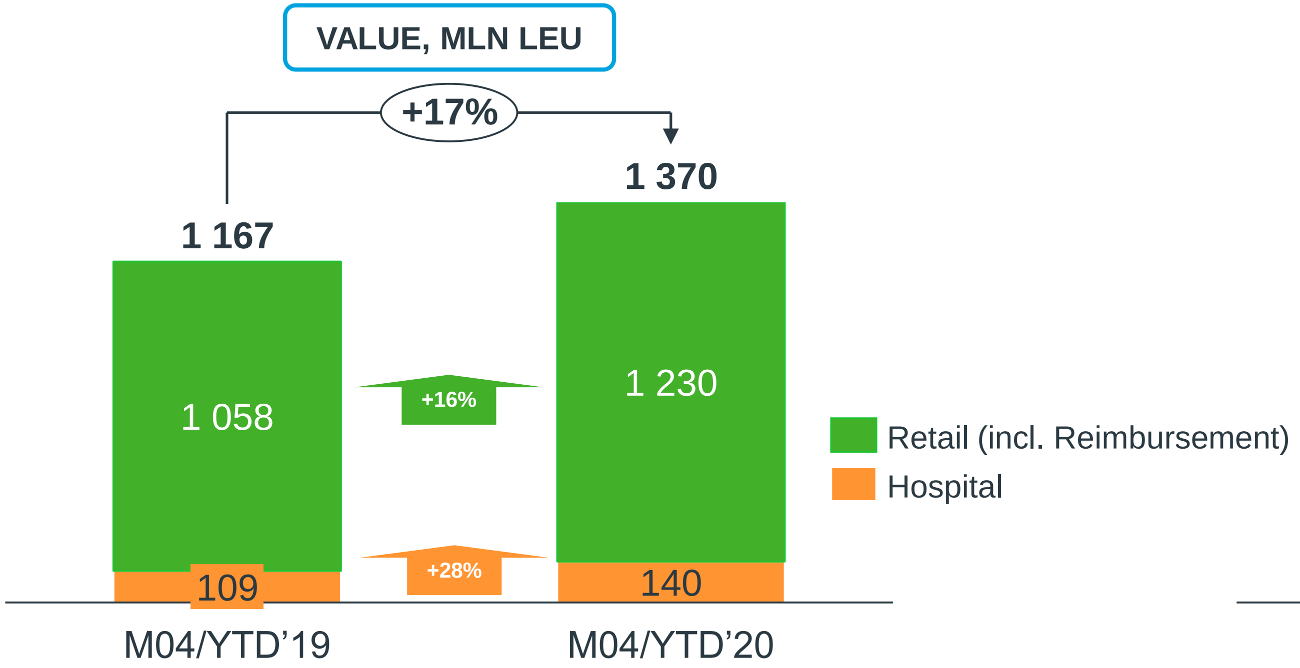
TOP-15 brands on Belarus market, January-April 2020

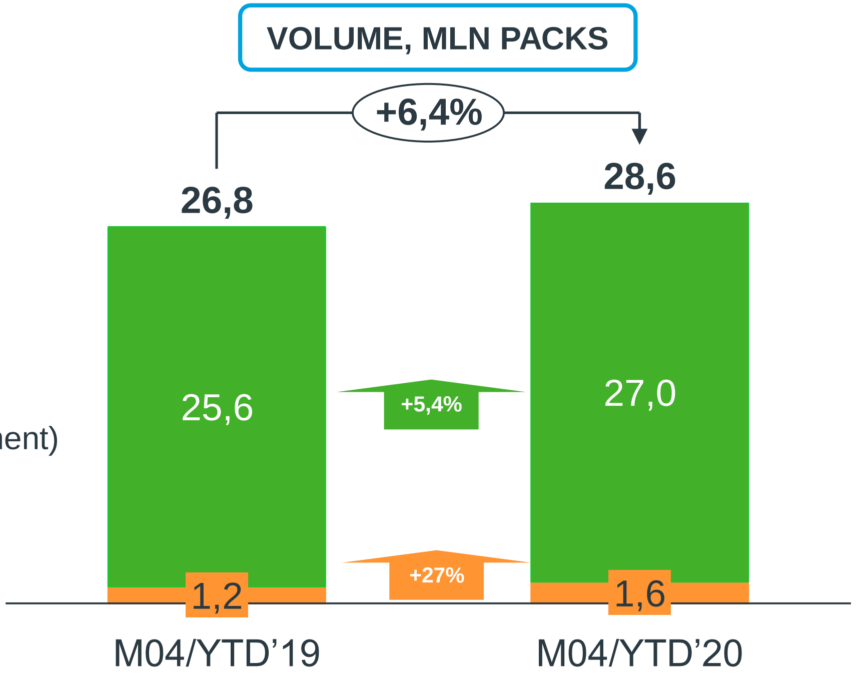
#	Brand	Market share, M04/YTD'20 (In percent in Local Currency)	Value growth / decline (In percent in Local Currency)	Volume growth / decline (In percent in Packs)
	Total pharma market	100,0%	19%	17%
1	XARELTO	2,0%	131%	112%
2	ARPETOL	0,9%	283%	269%
3	NATRIUM CHLORIDUM	0,8%	-5%	-8%
4	CEREPRO	0,8%	42%	38%
5	ADVAGRAF	0,6%	266%	333%
6	FLUSTOP	0,6%	115%	114%
7	GLICLAZIDE MR	0,6%	12%	-25%
8	AUGMENTIN	0,5%	50%	46%
9	GROPRINOSIN	0,5%	48%	59%
10	PARACETAMOL	0,4%	239%	340%
11	PHENYBUT	0,4%	38%	38%
12	ACTOVEGIN	0,4%	-3%	-9%
13	MEROPENEM-TPH	0,4%	27%	30%
14	OMEPRAZOL	0,4%	18%	18%
15	LINEZOLID	0,4%	-57%	19%

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

Moldova pharma market growth in January-April 2020

Market grew by 17% in value and decreased by 6,4% in volume





Indicator	LEU	USD	EUR	PACKS
Value M04/YTD'20, Mln.	1 370	77,5	70,4	28,6
Growth M04/YTD'20%	▲ 17%	▲ 15%	▲ 18%	▲ 6,4%

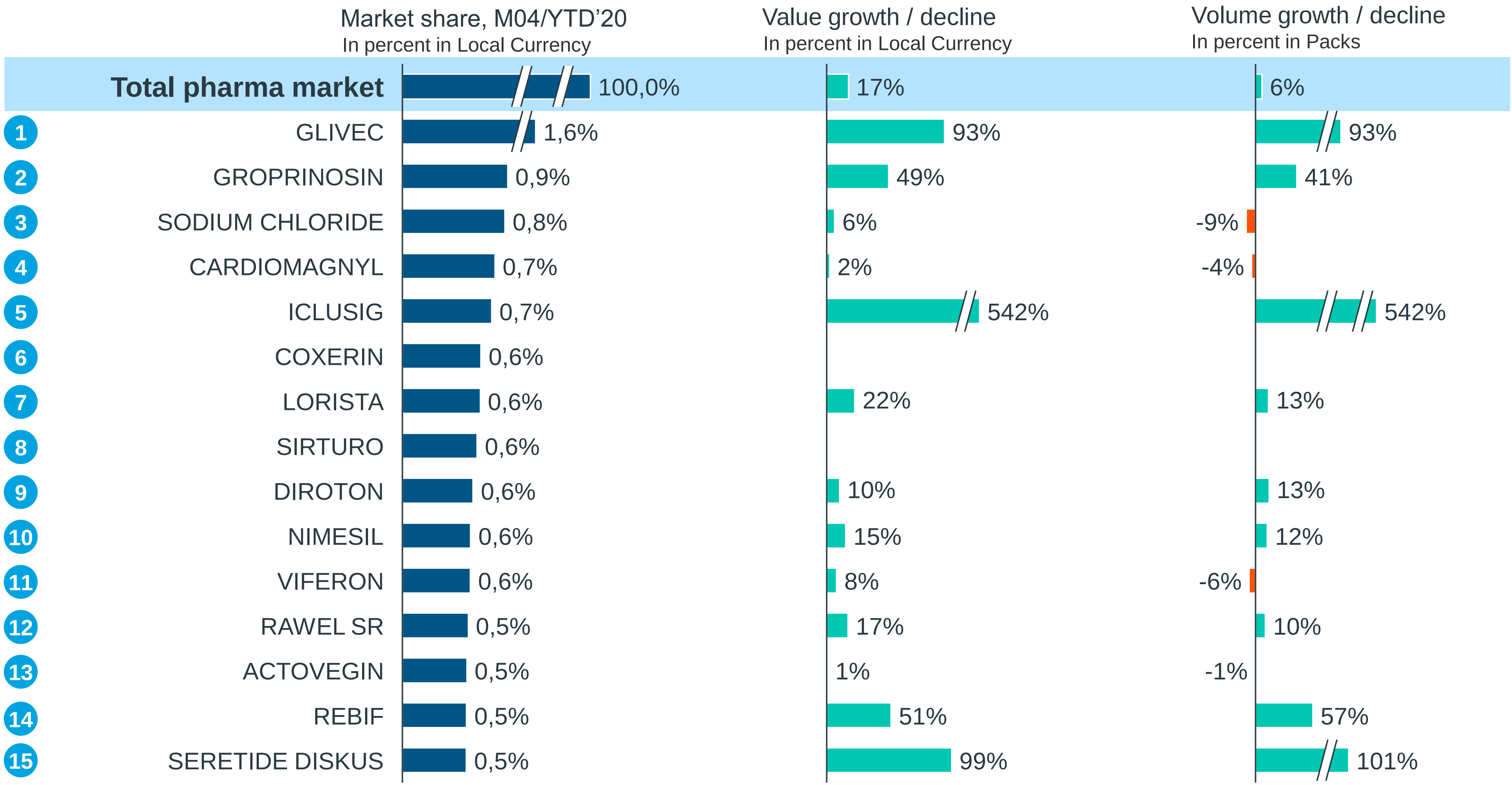
Source: IQVIA databases. Retail, Hospital, Reimbursement (excluding food supplements and diagnostic agents), TRD Prices

TOP-15 corporations on Moldova market, January-April 2020

#	Corporation	Market share, M04/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%	17%	6%
1	BALKAN PHARMA	7,0%	277%	137%
2	MENARINI	6,3%	13%	6%
3	KRKA	5,9%	8%	0%
4	GEDEON RICHTER	5,1%	3%	3%
5	NOVARTIS	3,7%	8%	-31%
6	GLAXOSMITHKLINE	3,4%	5%	-14%
7	SANOFI-AVENTIS	2,3%	6%	-1%
8	WORLD MEDICINE	2,2%	1%	-2%
9	TAKEDA	2,1%	-1%	-1%
10	NOBEL ILAC SAN TUR	2,1%	26%	11%
11	EGIS	1,6%	30%	17%
12	GRINDEX	1,4%	15%	24%
13	BAYER HEALTHCARE	1,4%	-4%	3%
14	RECKITT BENCKISER	1,4%	77%	58%
15	BILIM ILAC SANAYI	1,4%	-10%	-15%

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

TOP-15 brands on Moldova market, January-April 2020



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

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