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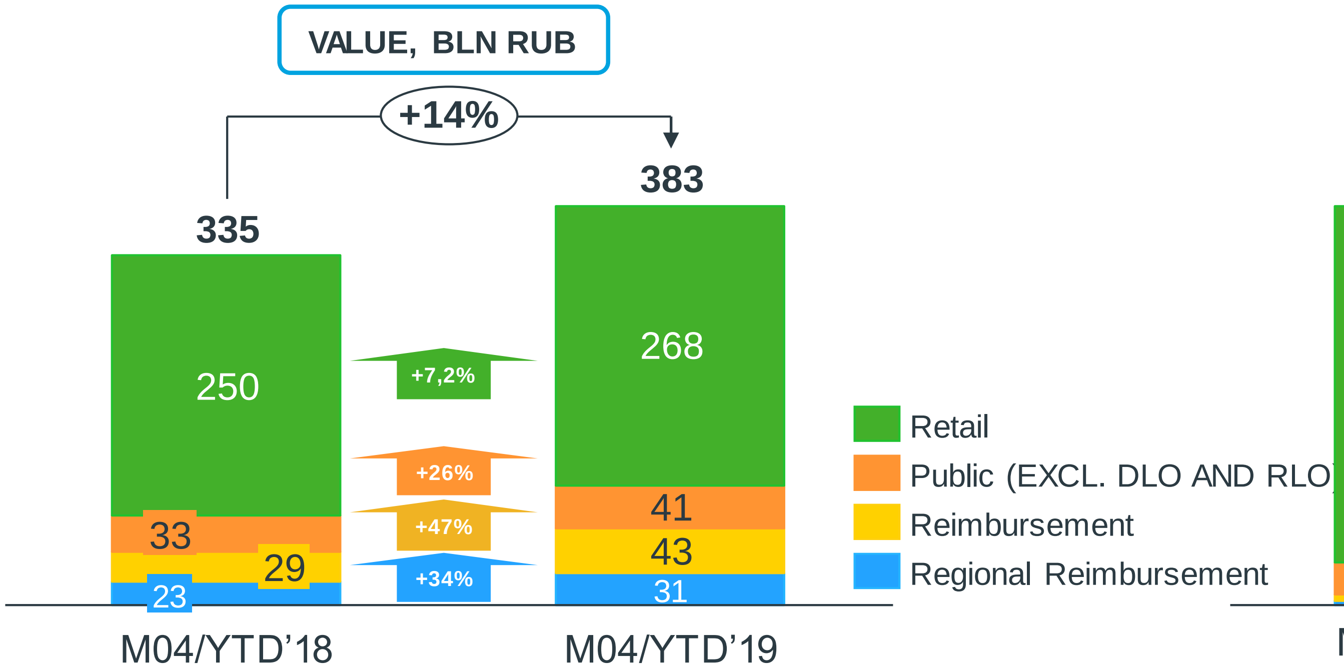
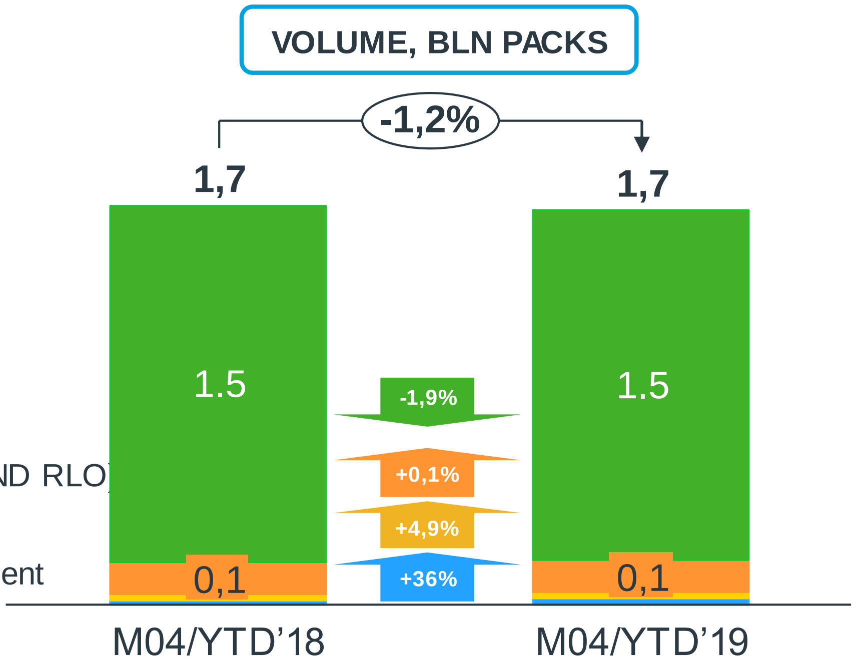
Facts from IQVIA

M04 2019

Russian pharma market growth in January-April 2019

Market grew by 14% in value and decreased by 1,2% in volume



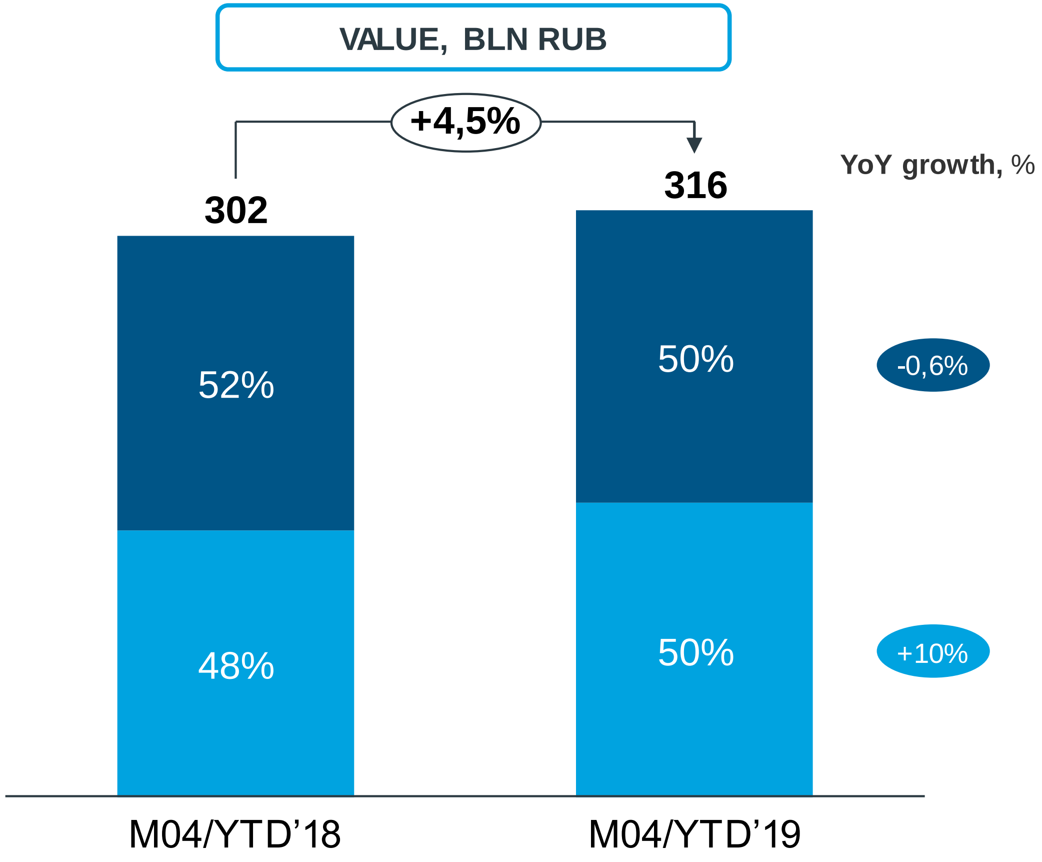


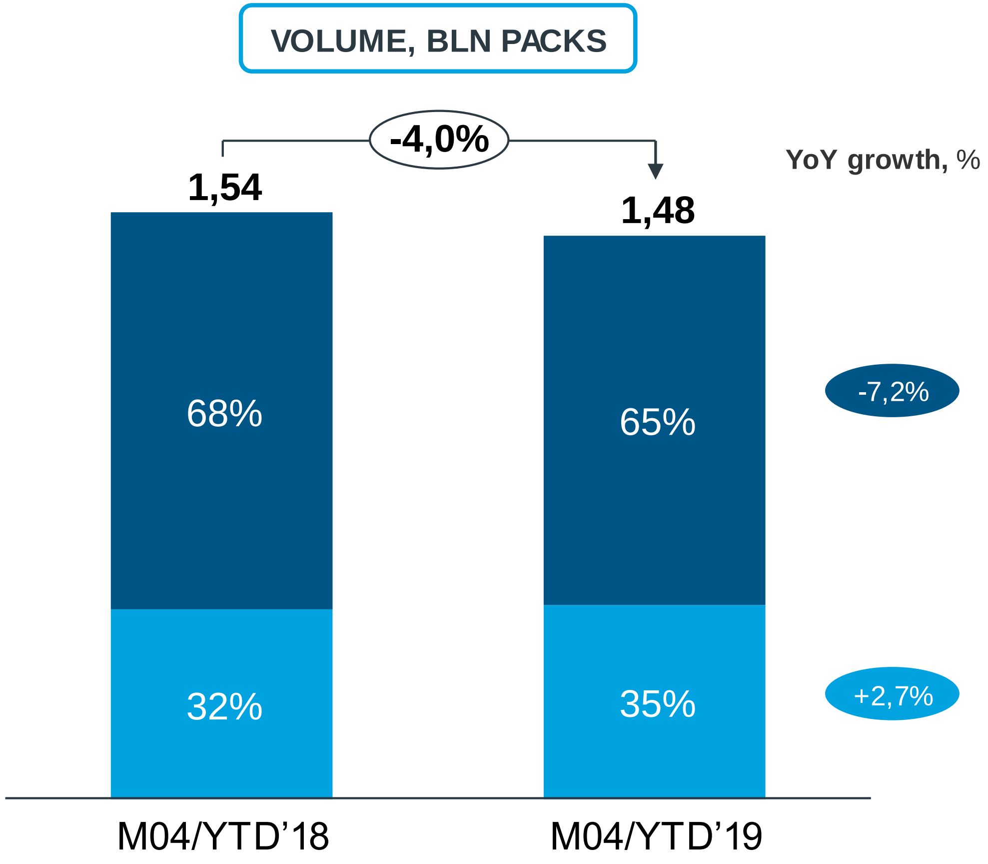
Indicator	RUB	USD	EUR	PACKS
Value M04/YTD'19, Bln.	383	5,8	5,2	1,7
Growth M04/YTD'19%	▲ 14%	▲ 0,8%	▲ 9,4%	▼ -1,2%

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

Russian pharma market growth in January-April 2019

Retail Sell-Out: Market grew by 4,5% in value and decreased by 4,0% in volume



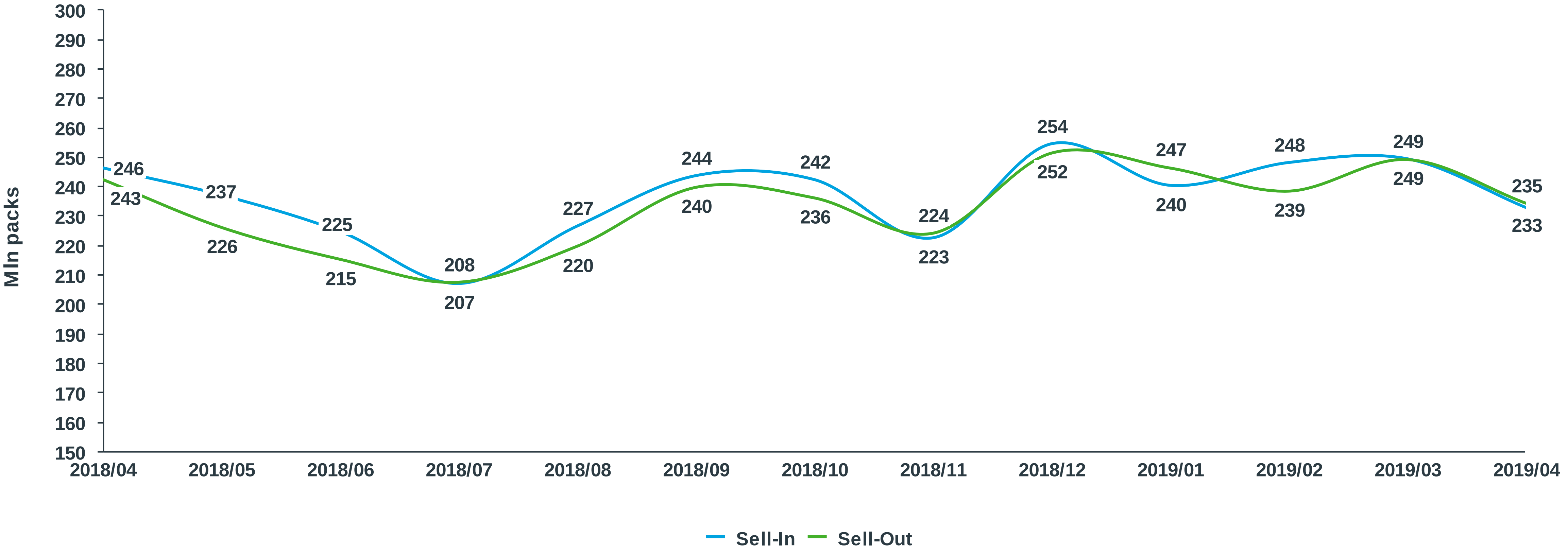


OTC RX

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

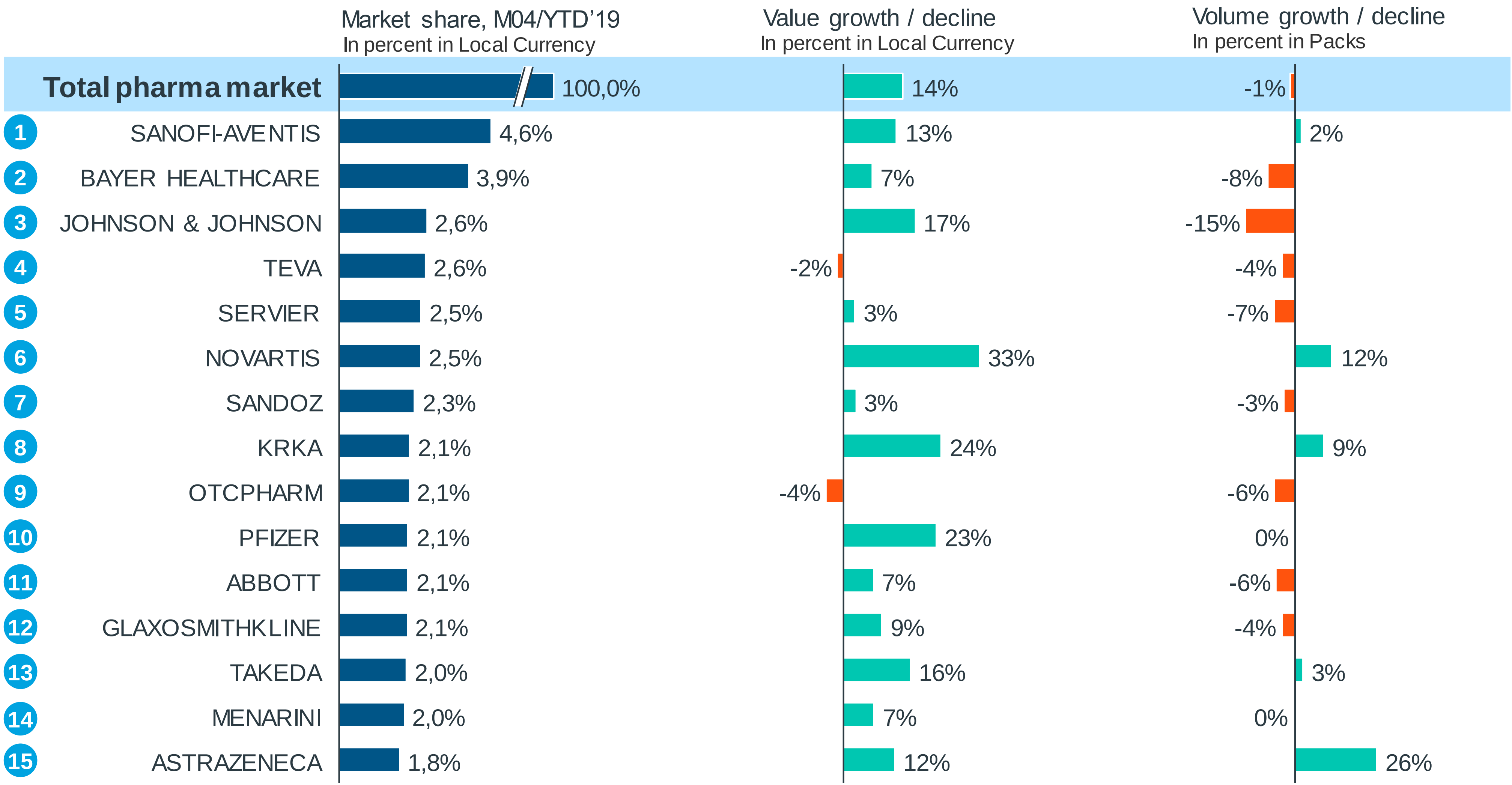
Sell-In vs Sell-Out, OTC registered drugs

Volume, mln packs



Source: Retail Audit and Pharmatrend. OTC registered drugs

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



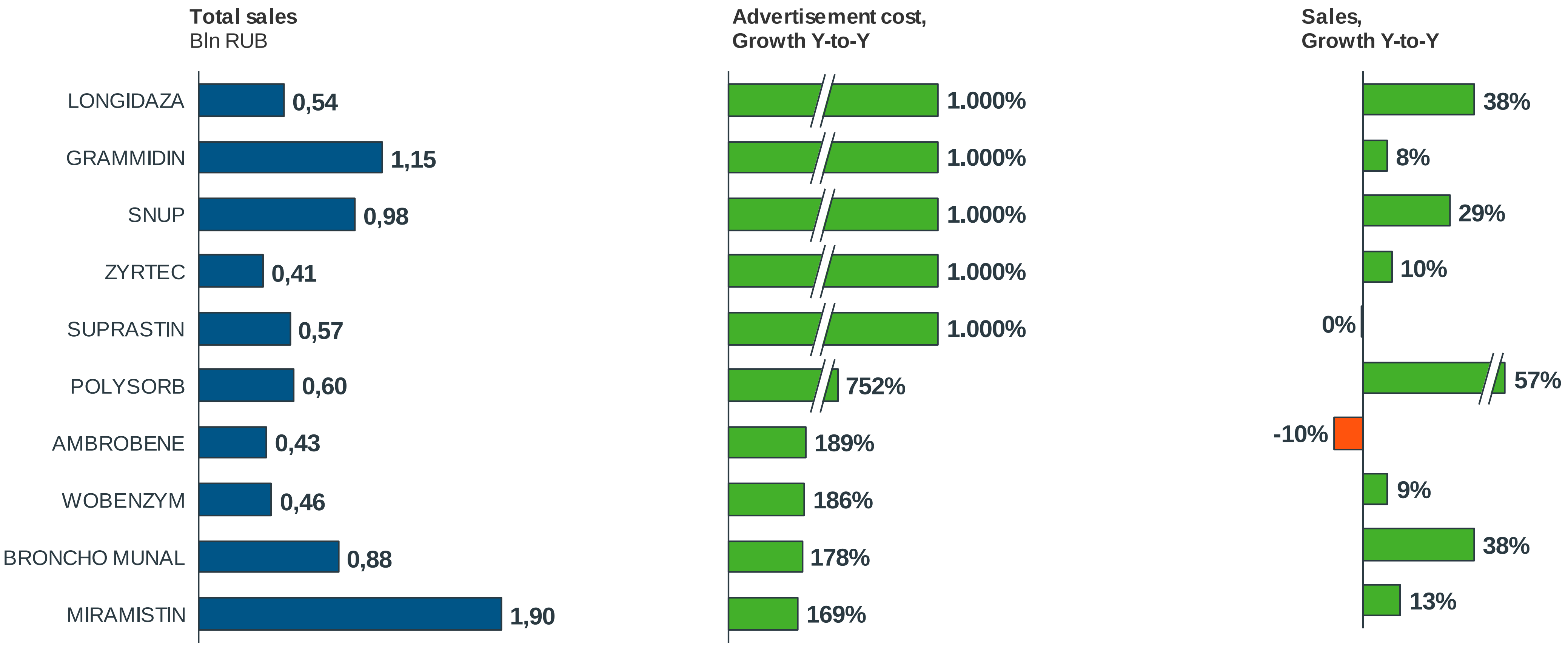
Source: IQVIA databases. Retail, Public, DLO, RLO (excluding food supplements and diagnostic agents), TRD Prices

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

		Market share, M04/YTD'19 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%	14%	-1%
1	XARELTO	0,8%	39%	33%
2	SOLIRIS	0,7%	41%	45%
3	REVLIMIDE	0,7%	358%	369%
4	TOUJEO SOLOSTAR	0,5%	48%	51%
5	KAGOCEL	0,5%	11%	-26%
6	DETRALEX	0,5%	6%	-2%
7	INGAVIRIN	0,5%	-12%	-16%
8	ACTOVEGIN	0,5%	2%	-4%
9	MEXIDOL	0,5%	0%	-1%
10	NATRIUM CHLORIDUM	0,4%	14%	10%
11	IMBRUVICA	0,4%	26%	26%
12	ELAPRASE	0,4%	114%	114%
13	MIRAMISTIN	0,4%	11%	3%
14	CARDIOMAGNYL	0,4%	3%	0%
15	ESSENTIALE N	0,4%	1%	-3%

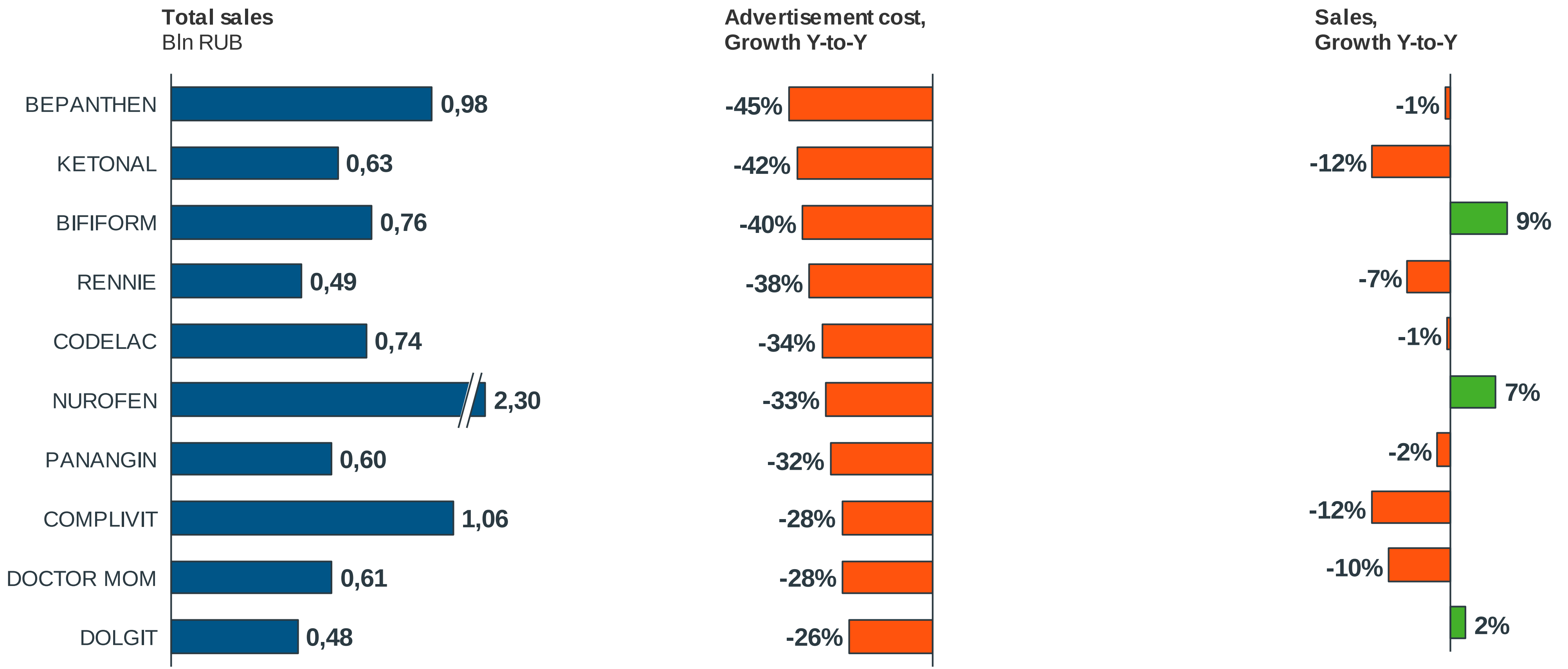
Source: IQVIA databases. Retail, Public, DLO, RLO (excluding food supplements and diagnostic agents), TRD Prices

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



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 2019



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 Pharmacy Chains, Q1 2019

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

#	Category	Regions	Pharmacy Chain / Pharmacy Association	Number of stores (1 April 2019)	Market share of pharmacy chain on the retail market (drugs only), 1Q 2019, %	Change in drug sales 1Q 2019/1Q 2018, %	The indicator of the relative sales of drugs, 1Q 2019 (relative to the leading audited company)	Average check, rub.	The rank of gross sales, 1Q 2019
1	Fed.	84	ASNA	8 665	13,91%	6,9%	2,248	325	-
2	Fed.	53	Rigla[1]	2 472	6,19%	19,5%	1,000	528	1
3	Fed.	39	Erkafarm[2]	1 200	4,86%	15,0%	0,785	-	2
4	Intr.	8	Pharmacy chain 36,6[3]	1 368	4,28%	4,0%	0,691	711	3
5	Fed.	27	Iris[4]	1 560	3,84%	14,1%	0,620	-	5
6	Fed.	35	Vita (Samara)	1 671	3,63%	48,0%	0,587	477	4
7	Fed.	10	Neo-farm	642	3,58%	30,7%	0,579	658	6
8	Fed.	41	Planeta zdorov'ya*	1 680	2,95%	20,4%	0,477	-	7
9	Fed.	41	April*	1 335	2,46%	46,4%	0,397	-	8
10	Fed.	8	Farmland	1 209	2,34%	19,2%	0,378	493	9
			Total:	**21 802**	**48,03%**	**16,7%**			

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
3Including AVE Group; Gorzdrav; A5 Group and Kalina-Pharm
4Including Fakmakopeyka, Farmakopeyka 24, Khelmi, Tvoy doktor, Zdes' apteka, Farmani, Aptechestvo, Stavropol'skiye gorodskiye apteki, Novuyu apteka and Minitsen
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 2019

#	Pharmacy Chain	The indicator of the relative gross sales of drugs, 1Q 2019	Change in gross sales 1Q 2019/ 1Q 2018, %
1	Rigla[1]	1,000	19,2%
2	Erkafarm[2]	0,777	16,9%
3	Pharmacy chain 36,6[3]	0,642	0,5%
4	Vita (Samara)	0,547	47,2%
6	Iris[4]	0,545	12,3%
6	Neo-farm	0,541	30,4%
7	Planeta zdorov'ya*	0,448	17,7%
8	April*	0,380	57,9%
9	Farmland	0,368	19,0%
10	Melodiya zdorov'ya[5]	0,241	47,7%

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
3Including AVE Group; Gorzdrav; A5 Group and Kalina-Pharm
4Including Fakmakopeyka, Farmakopeyka 24, Khelmi, Tvoy doktor, Zdes' apteka, Farmani, Aptechestvo, Stavropol'skiye gorodskiye apteki, Novuyu apteka and Minitsen
5Including own pharmacies, excluding franchising and partners
Source: based on data from pharmacy chains and pharmacy associations participating in the rating

TOP-5 pharmacy associations and service platforms by sales of drugs (excluding reimbursement drugs supply), 1Q 2019

#	Pharmacy Association / Service Platform	Head Office	Number of stores (1 April 2019)	Market share of pharmacy association on the retail market, drugs only, 1Q 2019, %	Change of drug sales 1Q 2019/1Q 2018, %	The indicator of the relative sales of drugs, 1Q 2019
1	ASNA	Moscow	8 665	13,91%	6,9%	1,000
2	ProApteka	Moscow	5 815	7,55%	45,4%	0,543
3	MFU[7]	S.Petersburg	2 805	4,51%	9,1%	0,324
4	Sozvezdiye	Moscow	1 896	1,72%	172,3%	0,124
5	VESNA[8]	S.Petersburg	1 288	1,48%	13,0%	0,107

7MedPharm Unity
8All-Russian United Commonwealth of Independent Drugstores
Source: based on data from pharmacy associations and service platform participating in the rating

Rating of Russian Wholesalers, Q1 2019

TOP-10 distributors on the market of direct drugs sales (including reimbursement drugs supply), Q1 2019

#	Distributor	Market share in direct sales of medication, %		Change in direct sales of medication 1Q 2019/1Q 2018, %	The rank of gross sales, 1Q 2019
		1Q 2019	1Q 2018		
1	Pulse	16,0%	16,8%	11,3%	1
2	Protek	14,8%	17,7%	-2,4%	2
3	Katren	14,4%	17,9%	-6,2%	3
4	Pharmkomplekt	4,7%	4,6%	19,9%	4
5	FK Grand Kapital	4,7%	4,3%	27,4%	5
6	BSS	4,2%	4,5%	9,0%	6
7	R-Pharm	3,3%	2,7%	41,8%	7
8	Profitmed	2,8%	3,1%	4,7%	8
9	Avesta Pharmacevtika	2,2%	2,0%	29,9%	9
10	IRVIN-2	1,6%	1,4%	38,0%	10
Total		**68,7%**	**74,8%**	**7,0%**	

Source: based on data from distributors participating in the rating

TOP-10 distributors on the retail market, Q1 2019

#	Distributor	Distributor Type	Head Office	Relative retail sales volume, 1Q 2019	Share of retail sales from the gross sales volume,%
1	Pulse	National	Chimki	1,000	96%
2	Katren	National	Novosibirsk	0,968	95%
3	Protek	National	Moscow	0,919	89%
4	Pharmkomplekt	National	N. Novgorod	0,291	79%
5	FK Grand Kapital	National	Moscow	0,279	91%
6	Profitmed	Interregional	Moscow	0,169	86%
7	Avesta Pharmacevtika	Interregional	Moscow	0,133	87%
8	BSS	National	S.Petersburg	0,133	48%
9	Agroresursy	Interregional	Novosibirsk	0,104	100%
10	Zdravservice	Interregional	Tula	0,053	76%

Source: based on data from distributors participating in the rating

TOP-10 distributors on the budget market, Q1 2019

#	Distributor	Distributor Type	Head Office	Relative volume of budget sales, 1Q 2019	Share of budget sales from the gross sales volume, %
1	Pharmstandard *	-	-	1,000	-
2	Farmimex *	-	-	0,687	-
3	R-Pharm	National	Moscow	0,492	70%
4	BSS	National	S.Petersburg	0,305	41%
5	IRVIN-2	Regional	Moscow	0,222	89%
6	Protek	National	Moscow	0,193	7%
7	Euroservice	Interregional	Moscow	0,186	72%
8	BIOTEC *	-	-	0,176	-
9	Pharmstor *	-	-	0,051	-
10	Pharmacevt	Interregional	Rostov-Na-Donu	0,047	53%

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

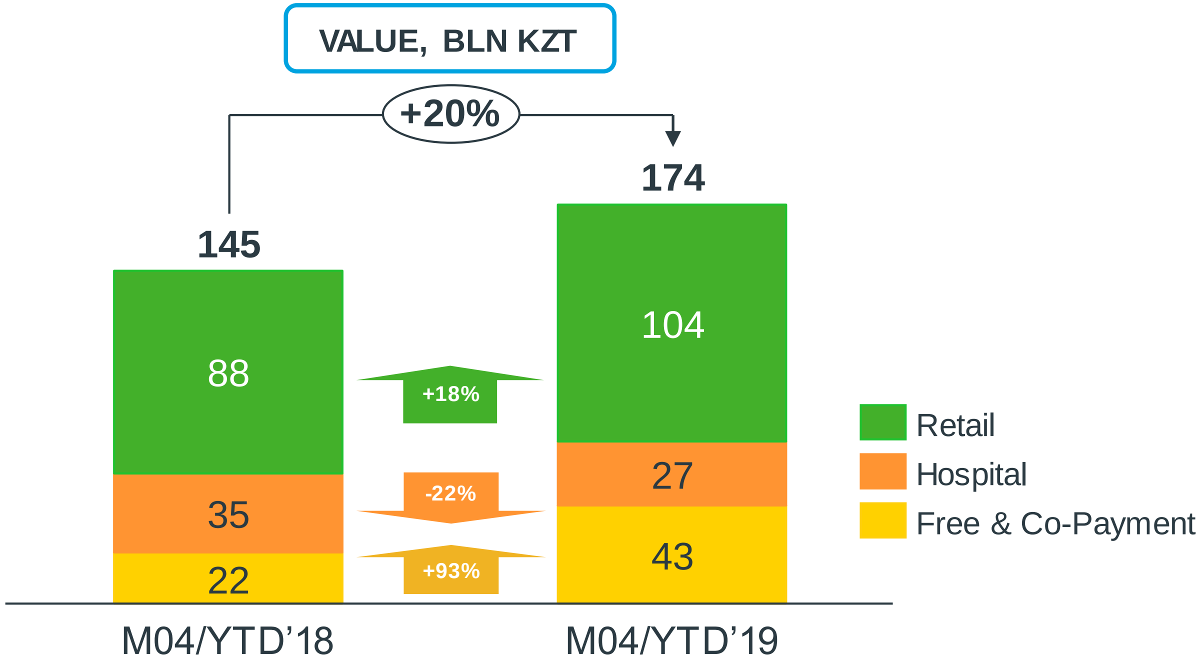
TOP-10 distributors on the market of secondary sales, Q1 2019

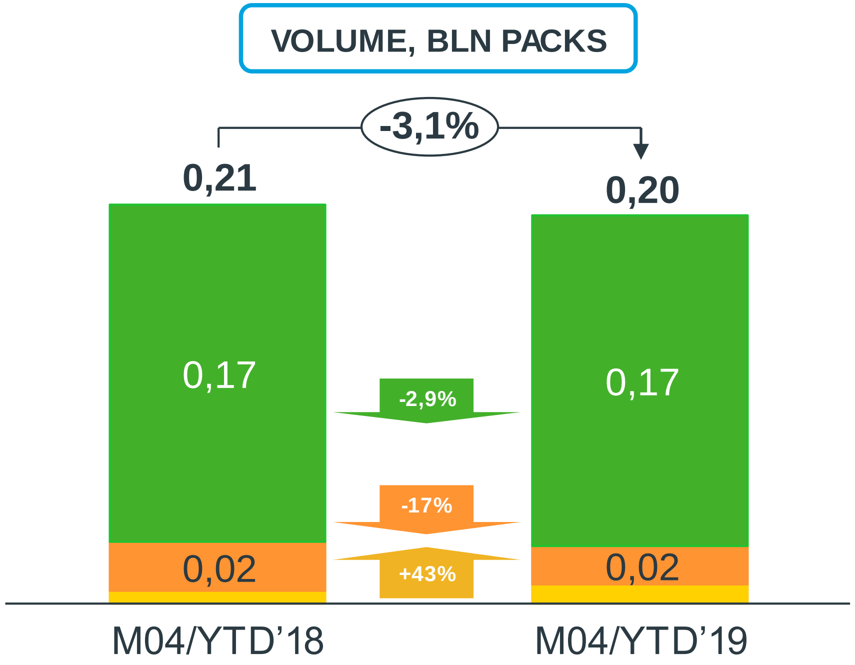
#	Distributor	Distributor Type	Head Office	Relative volume of secondary distribution, 1Q 2019	Share of secondary distribution sales from the gross sales volume, %
1	Pharmkomplekt	National	N.Novgorod	1,000	19%
2	R-Pharm	National	Moscow	0,850	23%
3	Protek	National	Moscow	0,557	4%
4	Pulse	National	Chimki	0,520	4%
5	BSS	National	S. Petersburg	0,438	11%
6	Katren	National	Novosibirsk	0,414	3%
7	FK Grand Kapital	National	Moscow	0,335	8%
8	Vitta Service	Regional	Moscow	0,298	48%
9	Profitmed	Interregional	Moscow	0,282	10%
10	Avesta Pharmacevtika	Interregional	Moscow	0,275	13%

Source: Data based on analysis of IQVIA tender base

Kazakhstan pharma market growth in January-April 2019

Market grew by 20% in value and decreased by 3,1% in volume





Indicator	KZT	USD	EUR	PACKS
Value M04/YTD'19, Bln.	174	0,46	0,41	0,20
Growth M04/YTD'19%	▲ 20%	▲ 2,4%	▲ 11%	▼ -3,1%

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

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

	Corporation	Market share, M04/YTD'19 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%	-3%
1	SANOFI-AVENTIS	6,0%	13%	3%
2	SANTO	6,0%	17%	10%
3	NOBEL-AFF	4,4%	29%	4%
4	JOHNSON & JOHNSON	3,6%	51%	-6%
5	BAYER HEALTHCARE	3,5%	21%	-9%
6	GLAXOSMITHKLINE	2,7%	18%	10%
7	TAKEDA	2,6%	24%	2%
8	ABBOTT	2,6%	44%	34%
9	TEVA	2,5%	-16%	-24%
10	GEDEON RICHTER	2,2%	27%	6%
11	SERVIER	2,2%	27%	10%
12	SANDOZ GROUP	2,2%	24%	-1%
13	NOVARTIS	2,0%	97%	93%
14	WORLD MEDICINE	1,9%	38%	18%
15	ROCHE	1,8%	-8%	31%

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

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

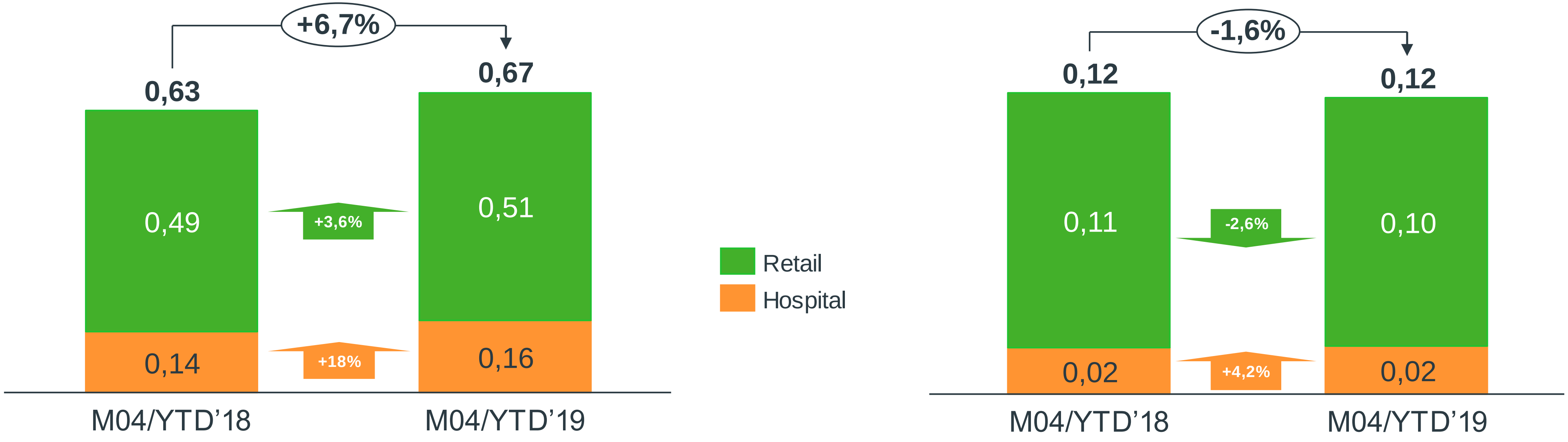
		Market share, M04/YTD'19 In percent in Local Currency	Value growth / decline In percent in Local Currency	Volume growth / decline In percent in Packs
	Total pharma market	100,0%	20%	-3%
1	HEXAXIM	1,5%	-28%	21%
2	IMMUTIN	1,0%	81%	81%
3	METOJECT	0,8%	97%	85%
4	IMMUNATE	0,7%	1 155%	635%
5	SIMPONI	0,7%	82%	74%
6	ELAPRASE	0,6%	21%	13%
7	ACTOVEGIN	0,6%	10%	-9%
8	LANTUS	0,6%	84%	74%
9	SUTENT	0,6%	110%	88%
10	NEXAVAR	0,5%	69%	58%
11	CANEPHRON N	0,5%	24%	0%
12	OCTANATE	0,5%	41%	53%
13	THERAFLU	0,5%	54%	17%
14	HERCEPTIN	0,5%	-49%	-55%
15	AVASTIN	0,5%	0%	8%

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

Belarus pharma market growth in January-April 2019

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

VALUE, BLN BLR | **VOLUME, BLN PACKS**



Indicator	BLR	USD	EUR	PACKS
Value M04/YTD’19, Bln.	0,67	0,31	0,28	0,12
Growth M04/YTD’19%	▲ 6,7%	▼ -1,2%	▲ 7,1%	▼ -1,6%

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

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

		Market share, M04/YTD'19 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%	7%	-2%
1	BELMEDPREPARATY RUE	8,1%	-13%	-6%
2	BORISOV ZMP	7,5%	12%	-4%
3	LEKPHARM JLLC	5,0%	2%	6%
4	NOVARTIS	3,8%	3%	7%
5	PHARMLAND JV LTD	3,4%	6%	-3%
6	SANOFI	3,3%	38%	12%
7	BAYER HEALTHCARE	3,1%	20%	0%
8	PHARMTECHNOLOGY LTD	2,8%	4%	-9%
9	MINSKINTERCAPS MRUE	2,4%	14%	-2%
10	KRKA	2,4%	24%	18%
11	GEDEON RICHTER	2,3%	-1%	-1%
12	TAKEDA	2,2%	45%	19%
13	BERLIN-CH/MENARINI	2,1%	0%	-3%
14	NATIVITA JLLC	2,1%	60%	150%
15	GSK	1,9%	-25%	-25%

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

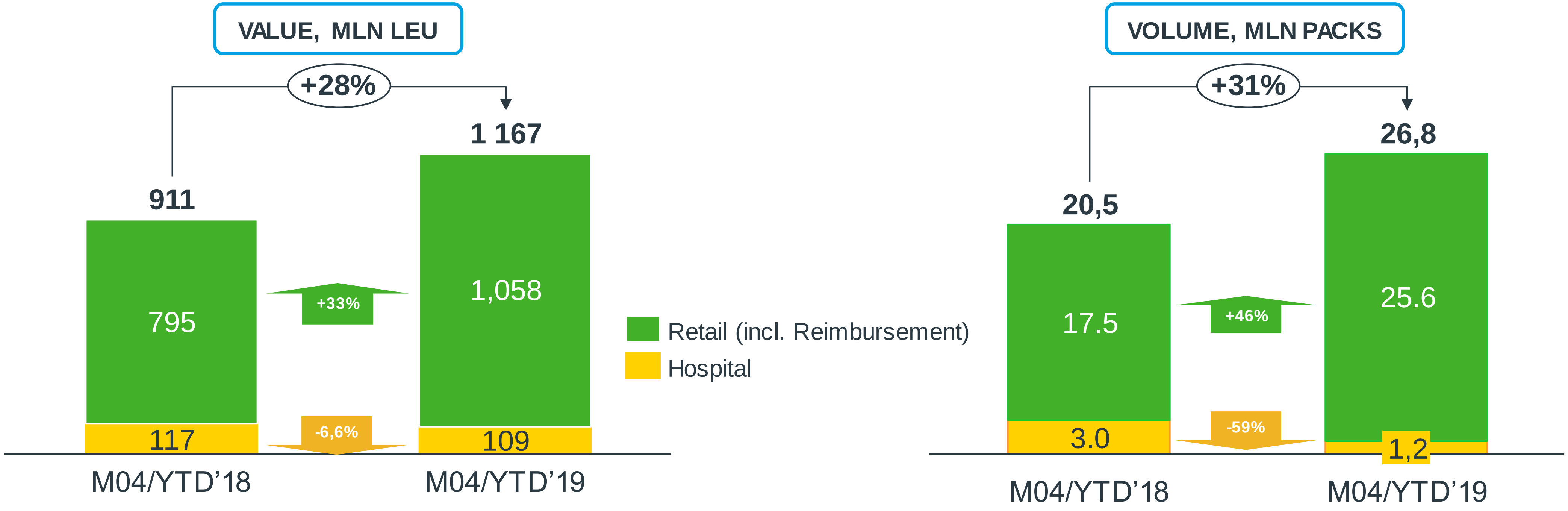
TOP-15 brands on Belarus market, January-April 2019

#	Brand	Market share, M04/YTD'19 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%	7%	-2%
1	LINEZOLID	1,1%	17%	-11%
2	T-MAB	1,1%	244%	255%
3	XARELTO	1,0%	155%	155%
4	SODIUM CHLORIDE	1,0%	11%	11%
5	BERIATE	0,9%		
6	R-MAB	0,7%	66%	78%
7	METFORMIN	0,7%	26%	19%
8	CEREPRO	0,6%	50%	46%
9	GLICLAZIDE MR	0,6%	7%	3%
10	ELAPRASE	0,6%		
11	LISINOPRIL	0,6%	4%	-3%
12	ADCETRIS	0,5%	2 515%	2 358%
13	ACTOVEGIN	0,5%	23%	17%
14	ATORVASTATIN	0,4%	9%	13%
15	FRAXIPARINE	0,4%	29%	22%

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

Moldova pharma market growth in January-April 2019

Market grew by 28% in value and by 31% in volume



Indicator	LEU	USD	EUR	PACKS
Value M04/YTD'19, Mln.	1 167	67,6	59,6	26,8
Growth M04/YTD'19%	▲ 28%	▲ 24%	▲ 34%	▲ 31%

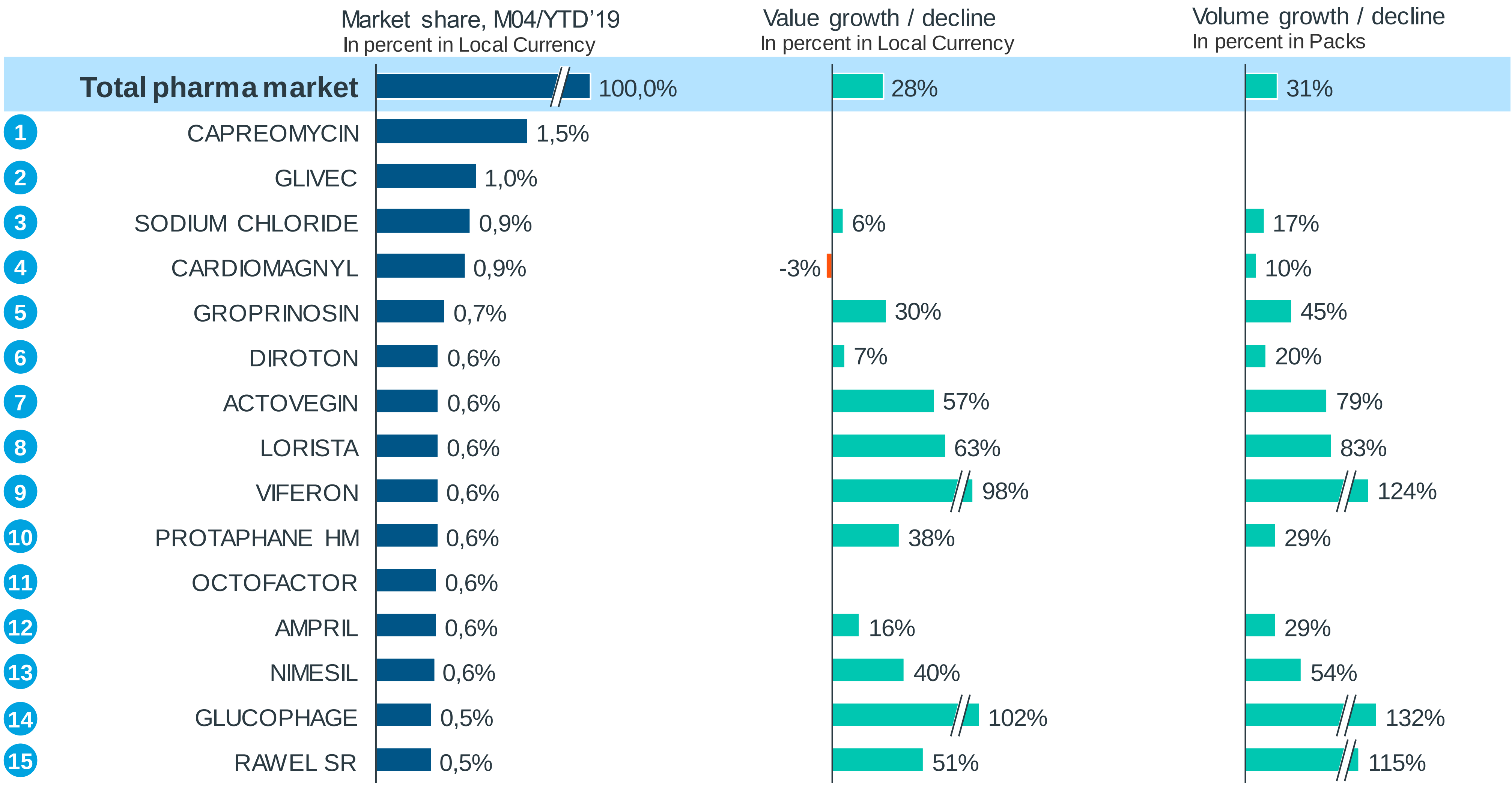
Source: IQVIA databases. Retail, Hospital, Reimbursement (excluding food supplements and diagnostic agents), TRD Prices

TOP-15 corporations on Moldova market, January-April 2019

		Market share, M04/YTD'19 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%	28%	31%
1	BERLIN-CH/MENARINI	6,6%	55%	66%
2	KRKA	6,5%	36%	54%
3	GEDEON RICHTER	5,8%	12%	24%
4	NOVARTIS	4,0%	120%	60%
5	GSK	3,7%	12%	16%
6	SANOFI	2,7%	14%	9%
7	WORLD MEDICINE	2,6%	22%	29%
8	TAKEDA	2,5%	15%	24%
9	BALKAN PHARMA	2,2%	54%	110%
10	BAYER HEALTHCARE	1,9%	63%	9%
11	NOBEL	1,9%	43%	58%
12	BILIM PHARMACEUTICALS	1,8%	13%	24%
13	NOVO NORDISK	1,5%	82%	47%
14	GRINDEX	1,5%	2%	-3%
15	VIANEX	1,5%		

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

TOP-15 brands on Moldova market, January-April 2019



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

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