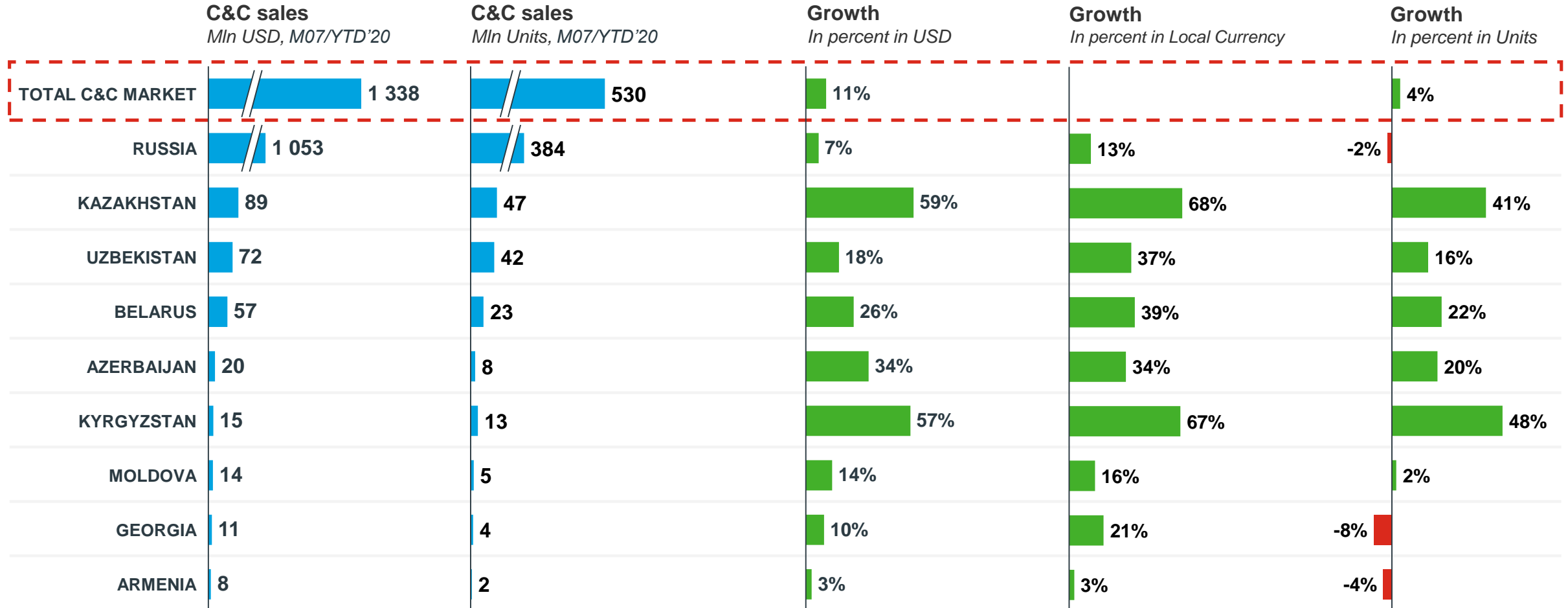


Facts from IQVIA

M07 2020

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

C&C increases by 11% in USD and by 4% 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-July 2020

Market grew by 15% in value and decreased by 1,1% in volume

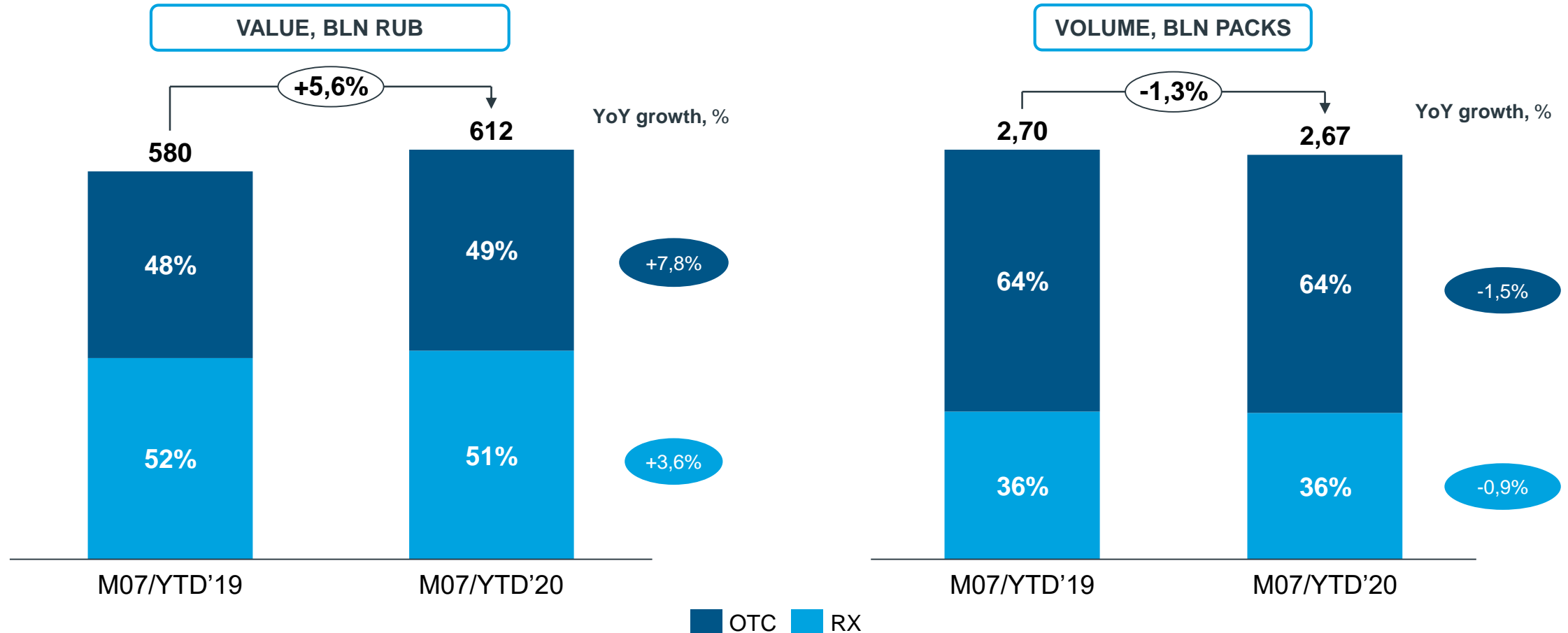


Indicator	RUB	USD	EUR	PACKS
Value M07/YTD'20, Bln.	854	12,3	11,1	3,1
Growth M07/YTD'20%	▲ 15%	▲ 7,4%	▲ 9,5%	▼ -1,1%

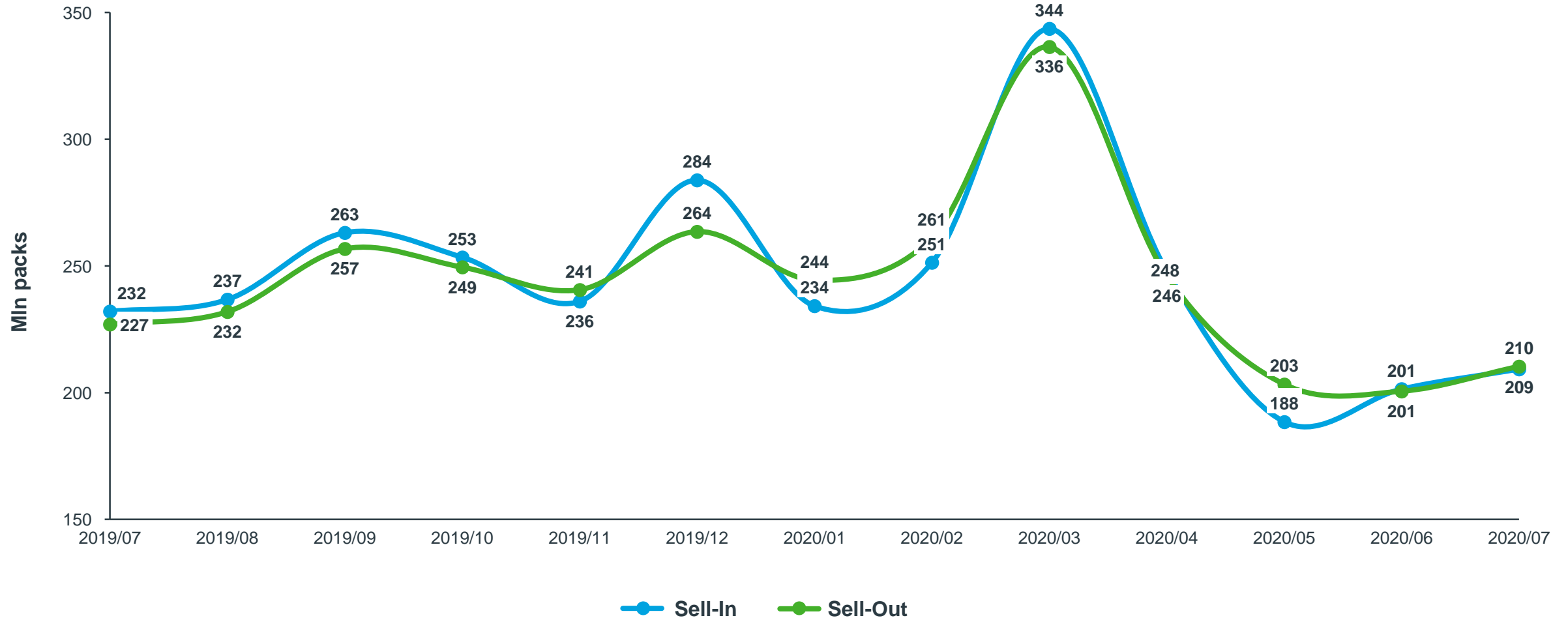


Russian pharma market growth in January-July 2020

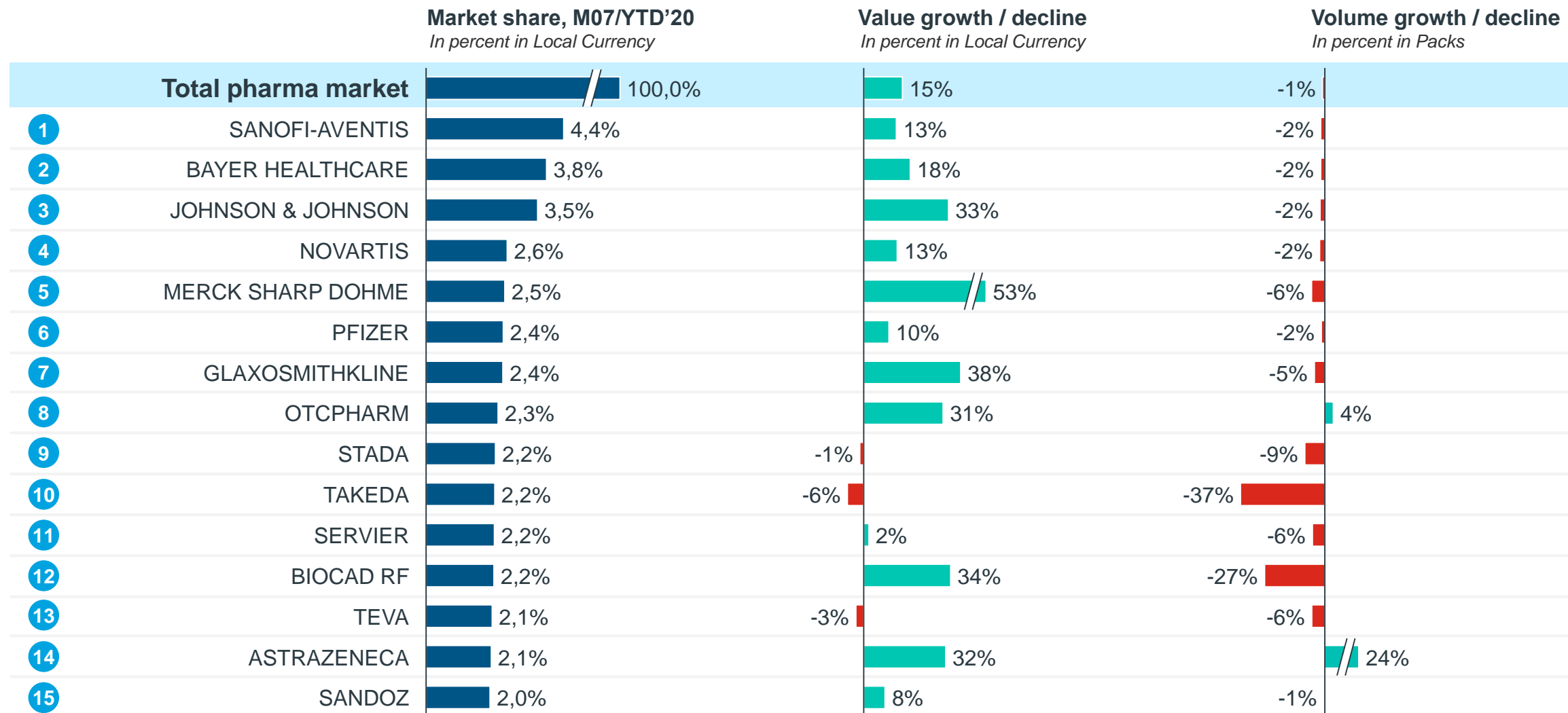
Retail Sell-Out: Market grew by 5,6% in value and decreased by 1,3% in volume



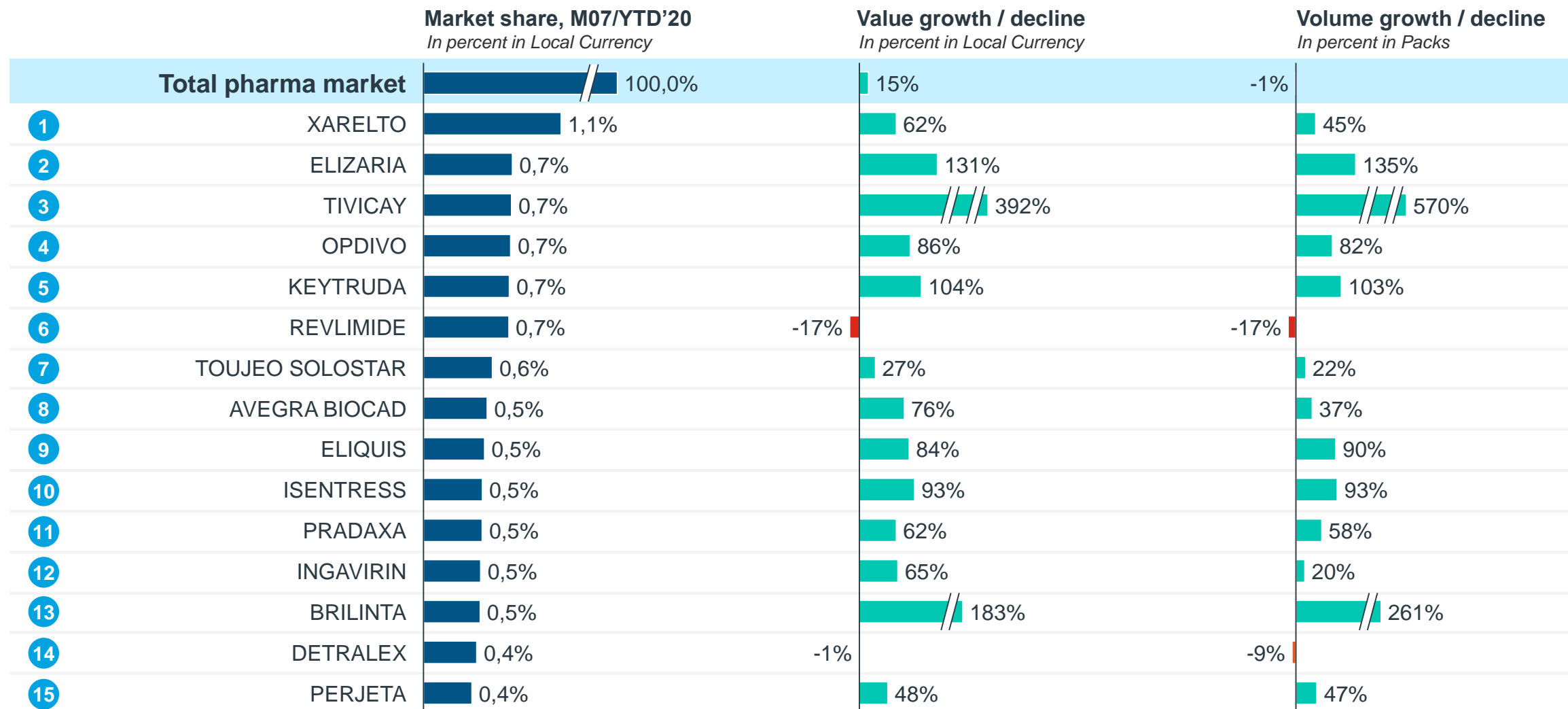
Sell-In vs Sell-Out, OTC registered drugs



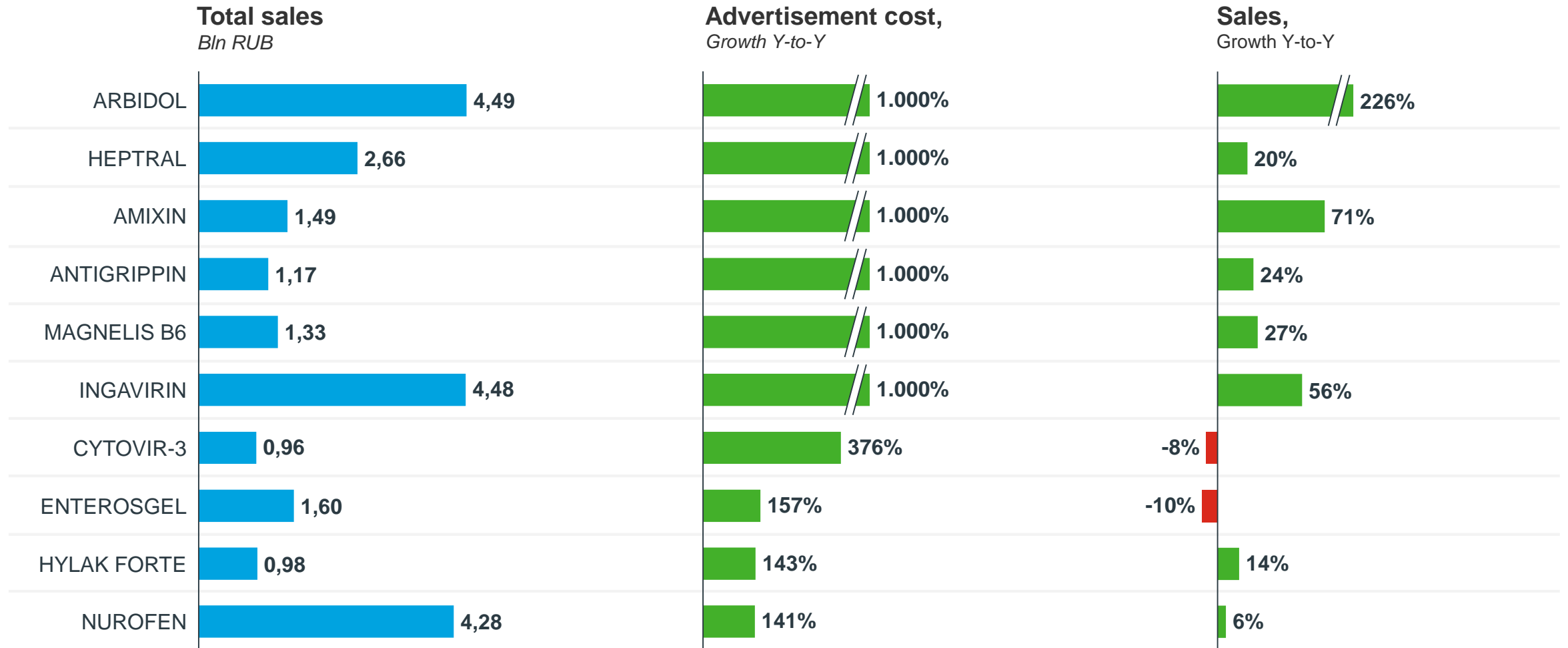
TOP-15 corporations on Russian market, January-July 2020



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

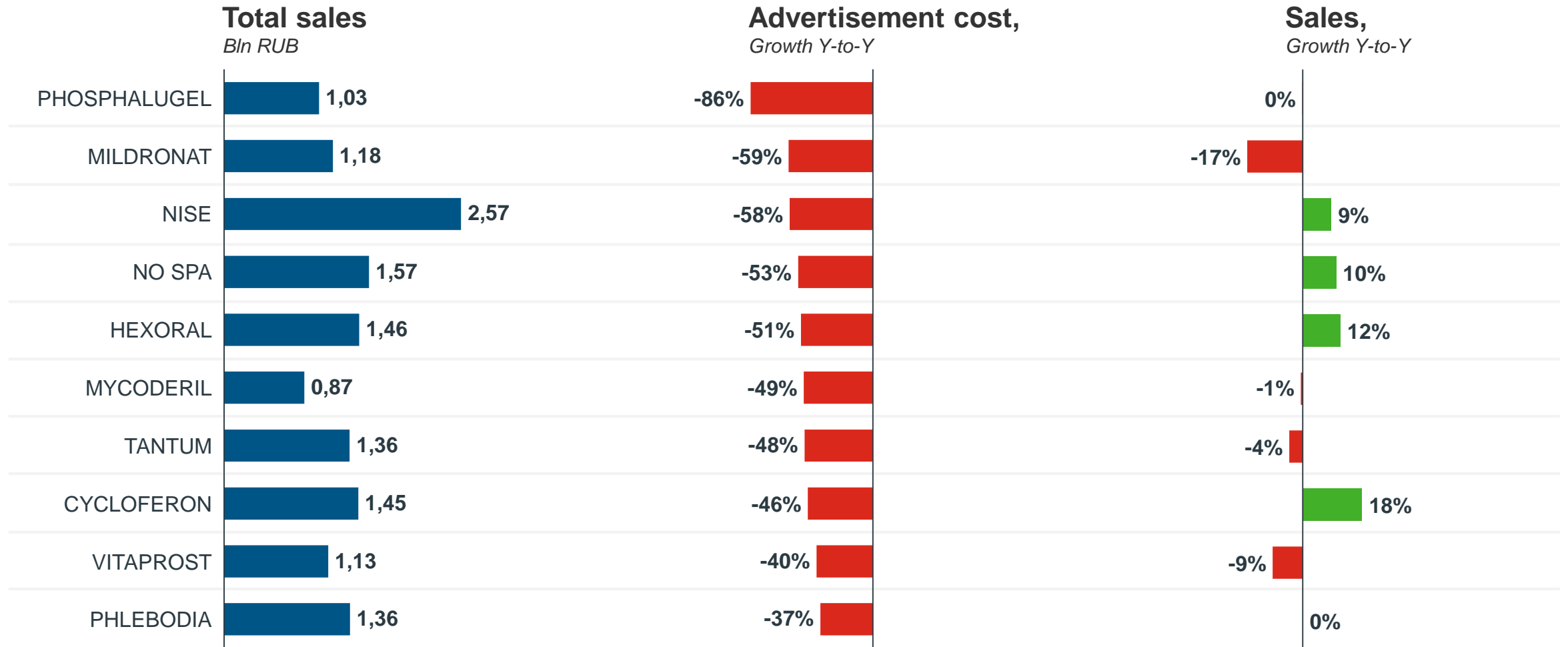


TOP-10 products by growth in advertisement investments in January-July 2020



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

TOP-10 products by decline in advertisement investments in January-July 2020



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

Rating of Russian pharmacy Chains 1-2Q 2020



TOP-10 pharmacy chains and pharmacy associations by sales of drugs (excluding reimbursement drugs supply) 1-2Q 2020



#	Category*	Regions	Pharmacy Chain / Pharmacy Association	Number of stores (1 July 2020)	Market share of pharmacy chain on the retail market, drugs only, 1-2Q 2020, %	Change in drug sales 1-2Q 2020 vs. 1-2Q 2019, %	The indicator of the relative sales of drugs, 1-2Q 2020 (relative to the leading audited company)	Average check, rub.	The rank of gross sales 1-2Q 2020 (relative to the leading audited company)
1	Fed.	83	ASNA	11 353	13,22%	18,5%	-	327	-
2	Fed.	54	Rigla ¹	2 964	5,84%	13,6%	1,000	567	1
3	Fed.	39	Erkafarm ²	1 067	4,49%	6,3%	0,769	-	2
4	Fed.	10	Neo-farm	767	3,80%	18,1%	0,651	750	4
5	Intr.	8	Pharmacy chains 36,6 ^{**4}	1 420	3,62%	12,3%	0,620	727	3
6	Fed.	27	Iris ³	1 714	3,10%	37,2%	0,532	-	5
7	Fed.	51	April	1 411	3,04%	7,9%	0,520	532	6
8	Fed.	46	Planeta zdorov'ya ^{**}	1 736	3,00%	6,6%	0,514	-	8
9	Fed.	36	Vita (Samara)	1 776	2,99%	1,8%	0,513	487	7
10	Fed.	8	Farmland	1 286	2,12%	7,2%	0,363	509	9
Total:				25 598	45,22%	12,9%			

*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 gorodskiyte 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

© 2020 IQVIA - Rating of Russian Pharmacy Chains Q1-4/1-2Q 2020



TOP-10 pharmacy chains by gross sales (excluding reimbursement drugs supply) 1-2Q 2020

#	Pharmacy Chain	The indicator of the relative gross sales of drugs, 1-2Q 2020	Change in gross sales 1-2Q 2020 vs. 1-2Q 2019, %
1	Rigla ¹	1,000	14,3%
2	Erkafarm ²	0,667	-3,5%
3	Pharmacy chain 36,6* ⁴	0,633	17,9%
4	Neo-farm	0,575	18,7%
5	Iris ³	0,516	34,8%
6	April	0,494	17,8%
7	Vita (Samara)	0,485	2,1%
8	Planeta zdorov'ya*	0,481	10,7%
9	Farmland	0,361	10,2%
10	Melodiya zdorov'ya ⁵	0,283	28,6%

*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 gorodskiyе 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

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TOP-6 pharmacy associations and service platforms by sales of drugs (excluding reimbursement drugs supply) 1-2Q 2020



#	Pharmacy Association / Service Platform	Head Office	Number of stores (1 July 2020)	Market share of pharmacy association on the retail market, drugs only, 1-2Q 2020, %	Change of drug sales 1-2Q 2020 vs. 1-2Q 2019, %	The indicator of the relative sales of drugs, 1-2Q 2020
1	ASNA	Moscow	11 353	13,22%	18,5%	1,000
2	ProApteka	Moscow	5 756	6,79%	15,4%	0,445
3	MFU ¹	St. Petersburg	4 693	6,05%	65,7%	0,455
4	Sozvezdiye	Moscow	4 056	3,26%	118,0%	0,246
5	VESNA ²	St. Petersburg	1 538	1,45%	21,6%	0,114
6	Zdravcity	Moscow	14 880	0,28%	92,4%	0,023

¹ MedPharm Unity

² All-Russian United Commonwealth of Independent Drugstores

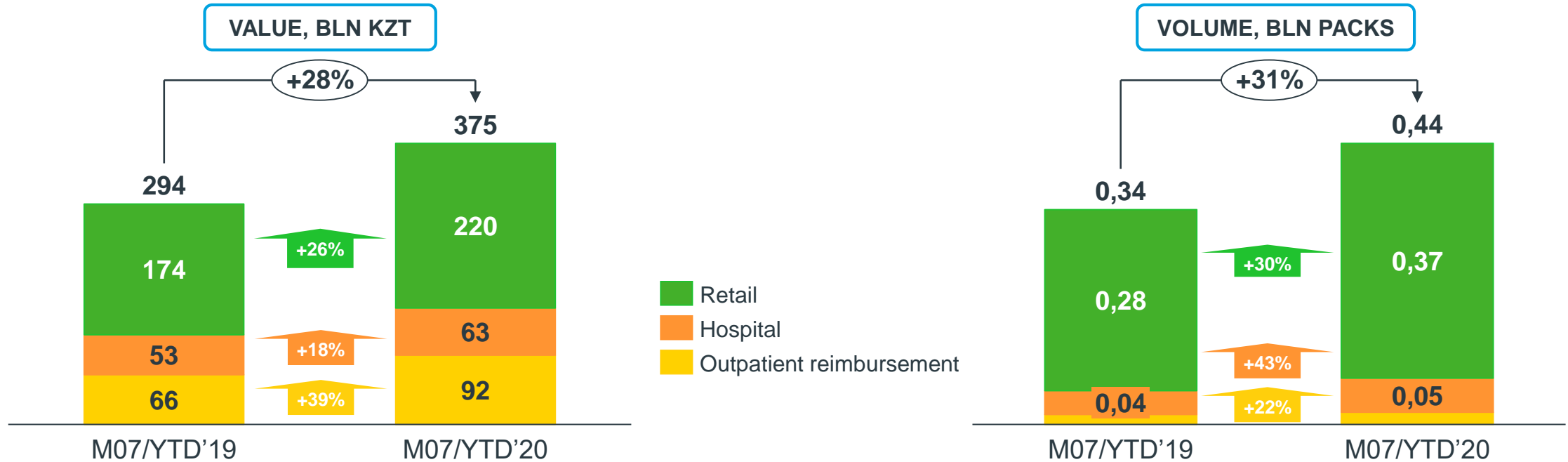
Source: based on data from pharmacy associations and service platform participating in the rating

© 2020 IQVIA - Rating of Russian Pharmacy Chains Q1-4/1-2Q 2020



Kazakhstan pharma market growth in January-July 2020

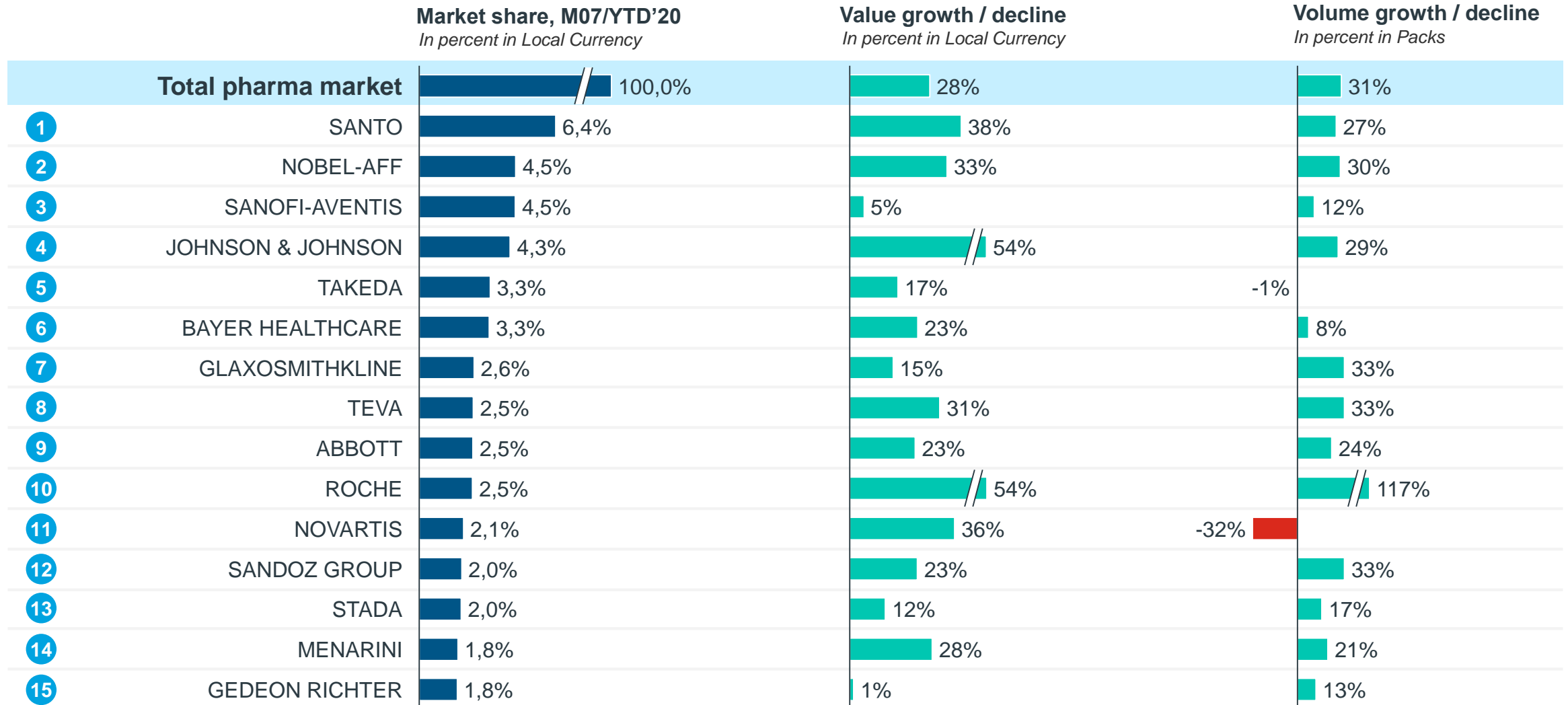
Market grew by 28% in value and by 31% in volume



Indicator	KZT	USD	EUR	PACKS
Value M07/YTD'20, Bln.	375	0,93	0,84	0,44
Growth M07/YTD'20%	▲ 28%	▲ 20%	▲ 22%	▲ 31%



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





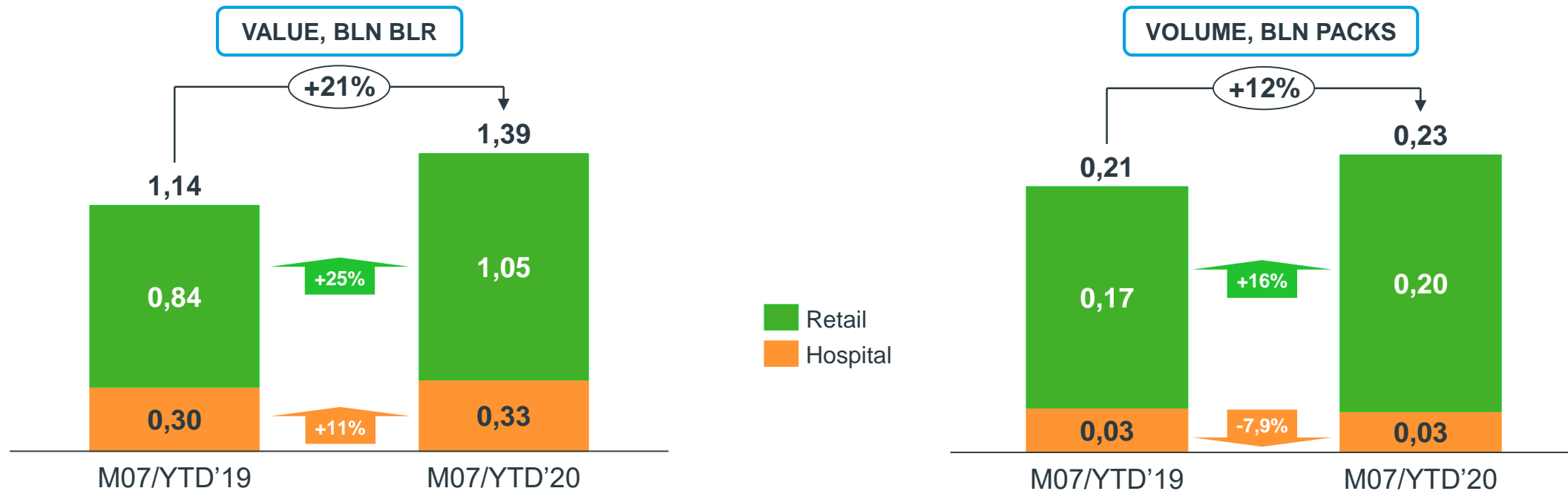
TOP-15 brands on Kazakhstan market, January-July 2020

	Market share, M07/YTD'20 <i>In percent in Local Currency</i>	Value growth / decline <i>In percent in Local Currency</i>	Volume growth / decline <i>In percent in Packs</i>
Total pharma market	100,0%	28%	31%
1 NATRIUM CHLORIDUM	0,9%	144%	115%
2 IMMUTIN	0,9%	12%	18%
3 PREVENAR 13	0,9%	-19%	-17%
4 XARELTO	0,8%	185%	179%
5 SIMPONI	0,7%	59%	59%
6 HERCEPTIN	0,7%	80%	80%
7 HEXAXIM	0,7%	1%	1%
8 IMMUNATE	0,6%	23%	13%
9 METOJECT	0,6%	31%	31%
10 PHYSIOTENS	0,6%	42%	47%
11 SPIRITUS AETHYLIC	0,6%	45%	16%
12 ELAPRASE	0,6%	50%	49%
13 NIMESIL	0,5%	91%	90%
14 CANEPHRON N	0,5%	25%	18%
15 SUTENT	0,5%	37%	38%



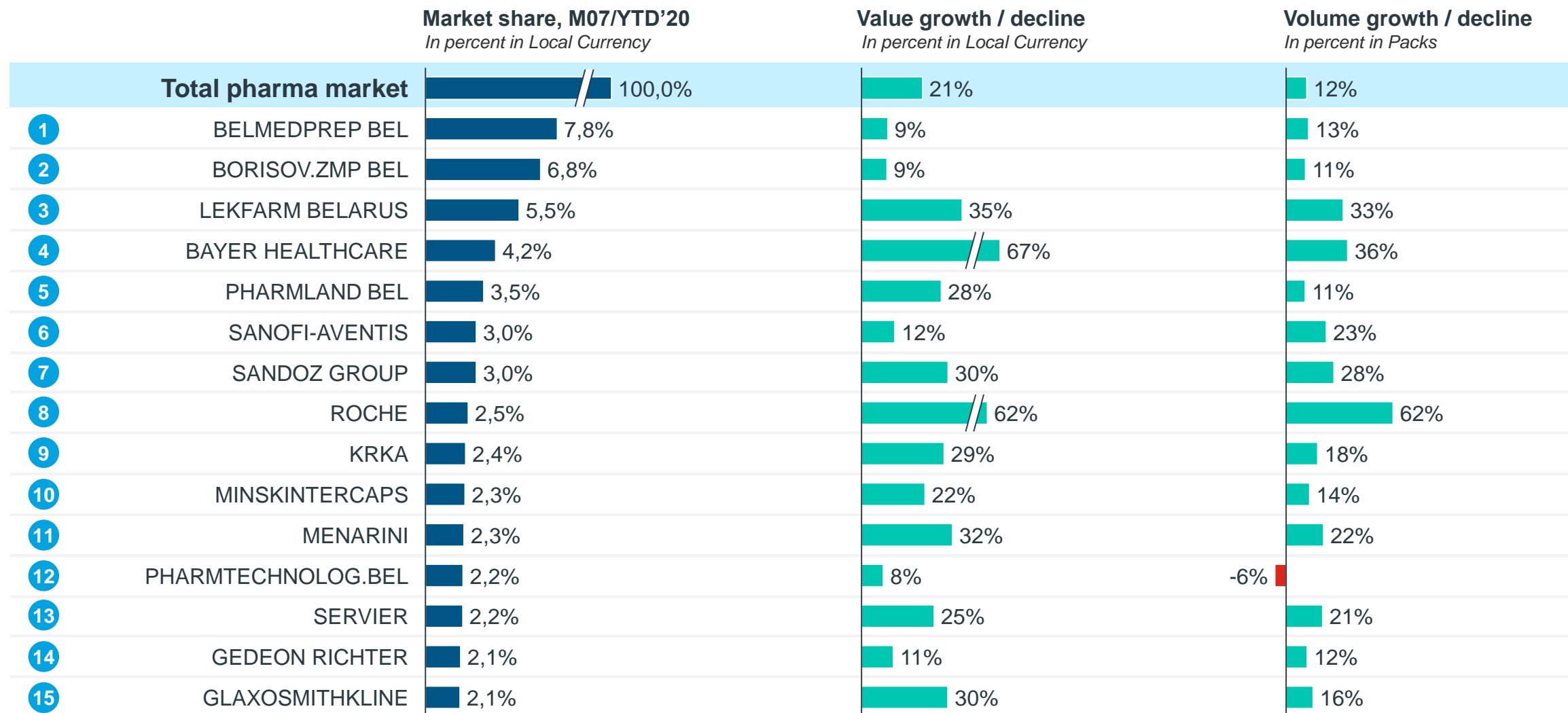
Belarus pharma market growth in January-July 2020

Market grew by 21% in value and by 12% in volume



Indicator	BLR	USD	EUR	PACKS
Value M07/YTD'20, Bln.	1,39	0,59	0,53	0,23
Growth M07/YTD'20%	▲ 21%	▲ 8,8%	▲ 11%	▲ 12%

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





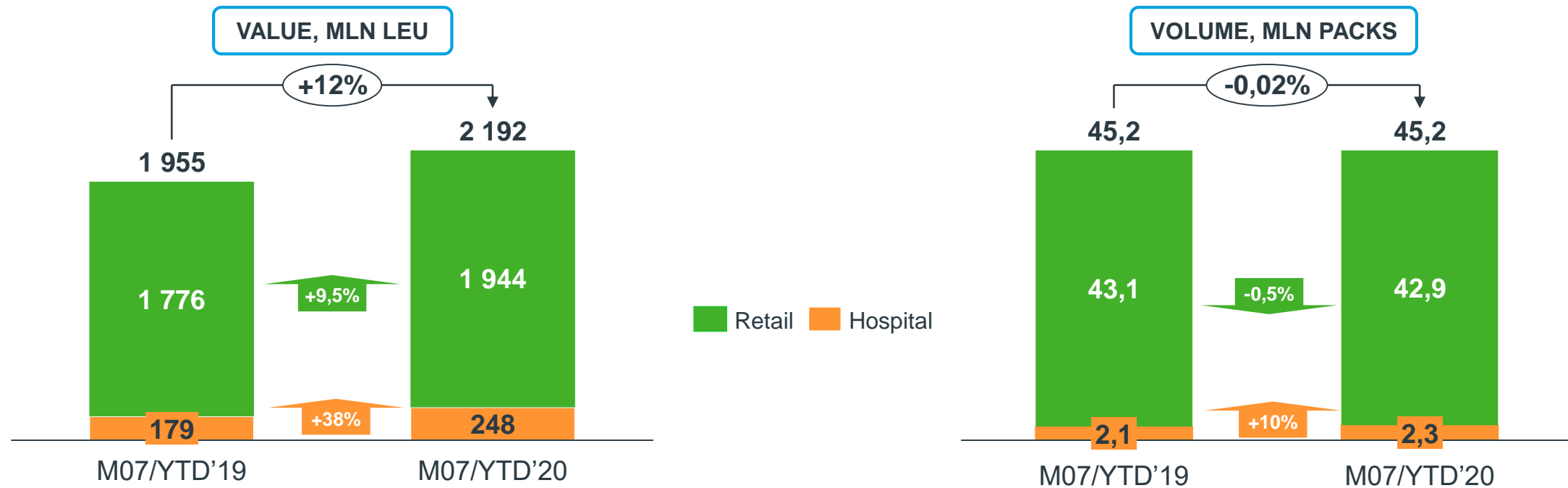
TOP-15 brands on Belarus market, January-July 2020

		Market share, M07/YTD'20 <i>In percent in Local Currency</i>	Value growth / decline <i>In percent in Local Currency</i>	Volume growth / decline <i>In percent in Packs</i>
Total pharma market		100,0%	21%	12%
1	XARELTO	1,8%	113%	83%
2	CEREPRO	0,8%	40%	30%
3	NATRIUM CHLORIDUM	0,7%	-10%	-13%
4	PERJETA	0,7%	55%	32%
5	ARPETOL	0,7%	334%	315%
6	FRAXIPARINE	0,5%	51%	34%
7	B-MAB	0,5%	153%	177%
8	KADCYLA	0,5%	93%	68%
9	MEROPENEM-TPH	0,5%	43%	44%
10	PROTAMIN-INSUL. HS	0,4%	87%	88%
11	GLICLAZIDE MV	0,4%	4%	-37%
12	FLUSTOP	0,4%	157%	154%
13	AUGMENTIN	0,4%	36%	28%
14	CO-AMLESSA	0,4%	114%	102%
15	PHENYBUT	0,4%	34%	34%



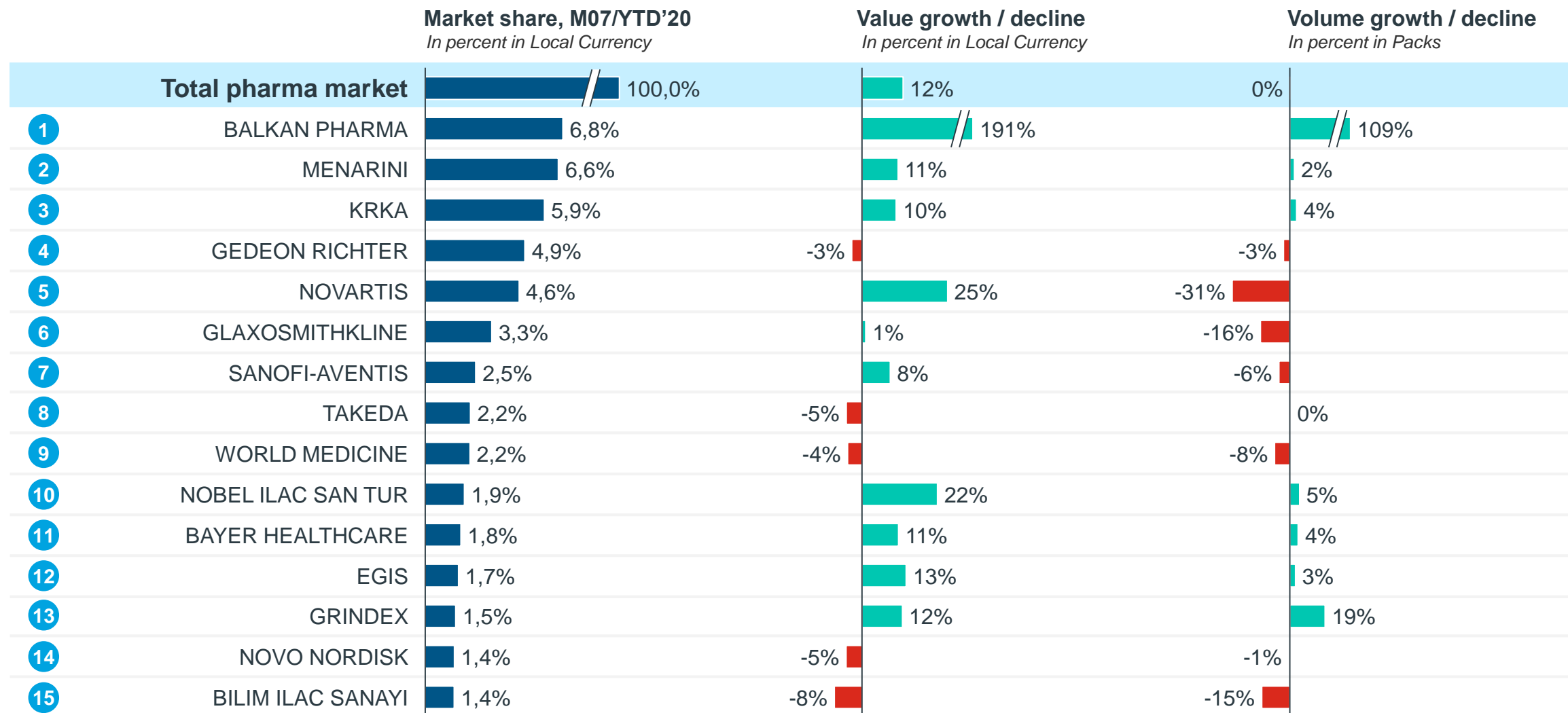
Moldova pharma market growth in January-July 2020

Market grew by 12% in value and decreased by 0,02% in volume



Indicator	LEU	USD	EUR	PACKS
Value M07/YTD'20, Mln.	2 192	124,8	112,6	45,2
Growth M07/YTD'20%	▲ 12%	▲ 12%	▲ 14%	▼ -0,02%

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





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

		Market share, M07/YTD'20 <i>In percent in Local Currency</i>	Value growth / decline <i>In percent in Local Currency</i>	Volume growth / decline <i>In percent in Packs</i>
Total pharma market		100,0%	12%	0%
1	GLIVEC	2,2%	120%	120%
2	CARDIOMAGNYL	0,8%	10%	4%
3	SODIUM CHLORIDE	0,8%	-11%	-23%
4	LORISTA	0,7%	36%	31%
5	GROPRINOSIN	0,6%	52%	44%
6	DIROTON	0,6%	9%	12%
7	SERETIDE DISKUS	0,6%	51%	54%
8	RAWEL SR	0,6%	29%	21%
9	NIMESIL	0,6%	12%	9%
10	PROTAPHANE HM	0,5%	2%	3%
11	GLUCOPHAGE	0,5%	12%	8%
12	REBIF	0,5%	30%	36%
13	AMPRIL	0,5%	0%	-2%
14	ACTOVEGIN	0,5%	-13%	-14%
15	CANEPHRON N	0,5%	2%	-8%

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