Facts from IQVIA

M10 2020

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

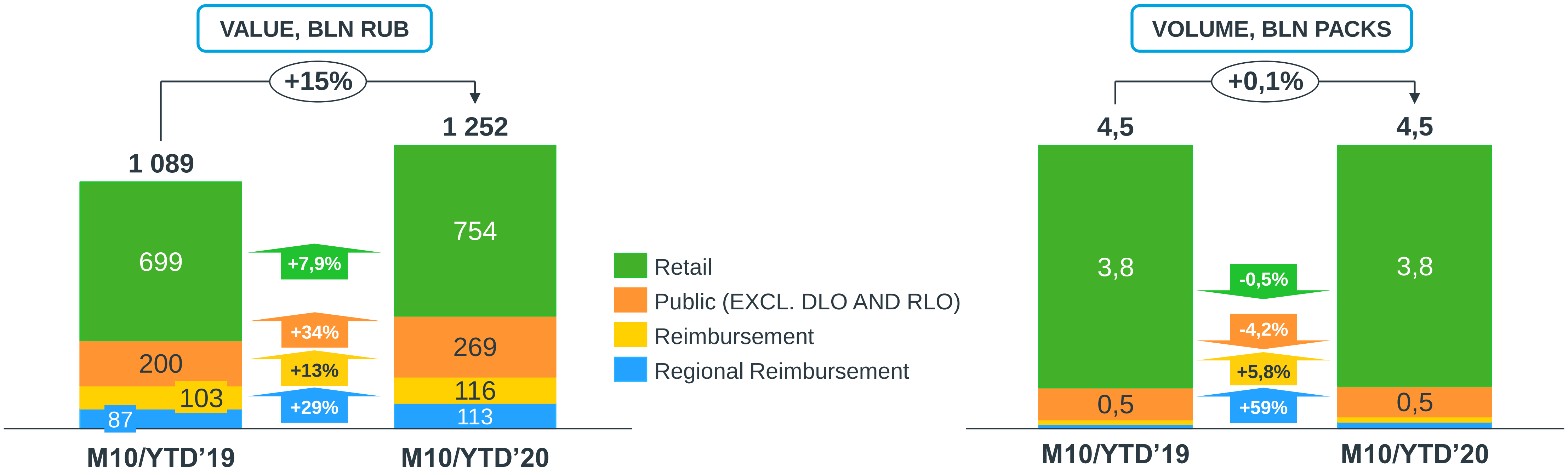
C&C increases by 14% in USD and by 6% in volume

	C&C sales *Mln USD, M10/YTD'20*	**C&C sales** *Mln Units, M10/YTD'20*	**Growth** *In percent in USD*	**Growth** *In percent in Local Currency*	**Growth** *In percent in Units*
TOTAL C&C MARKET	2 097	816	14%		6%
RUSSIA	1 664	608	10%	21%	3%
UZBEKISTAN	135	64	60%	87%	25%
KAZAKHSTAN	116	63	29%	37%	18%
BELARUS	82	34	20%	38%	17%
AZERBAIJAN	28	11	28%	28%	16%
MOLDOVA	23	9	25%	23%	6%
KYRGYZSTAN	22	19	49%	61%	34%
GEORGIA	15	6	-3%	6%	-2%
ARMENIA	12	3	8%	9%	0%

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

Russian pharma market growth in January-October 2020

Market grew by 15% in value and by 0,1% in volume

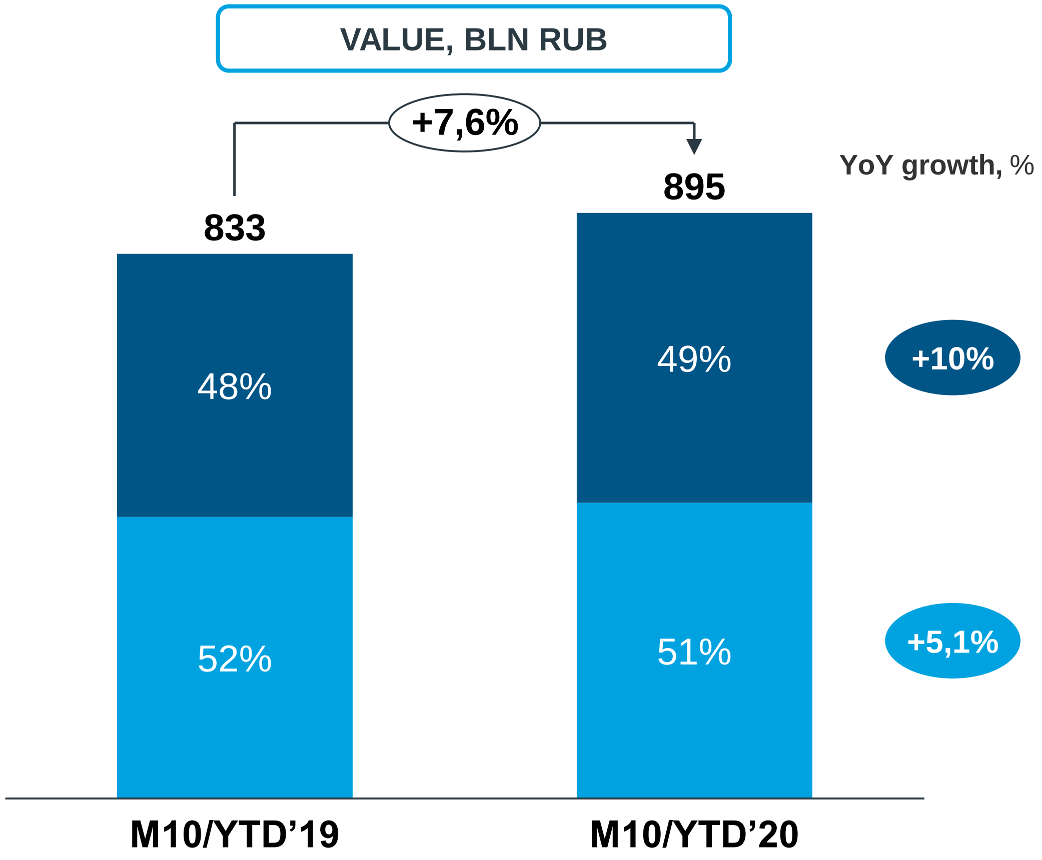


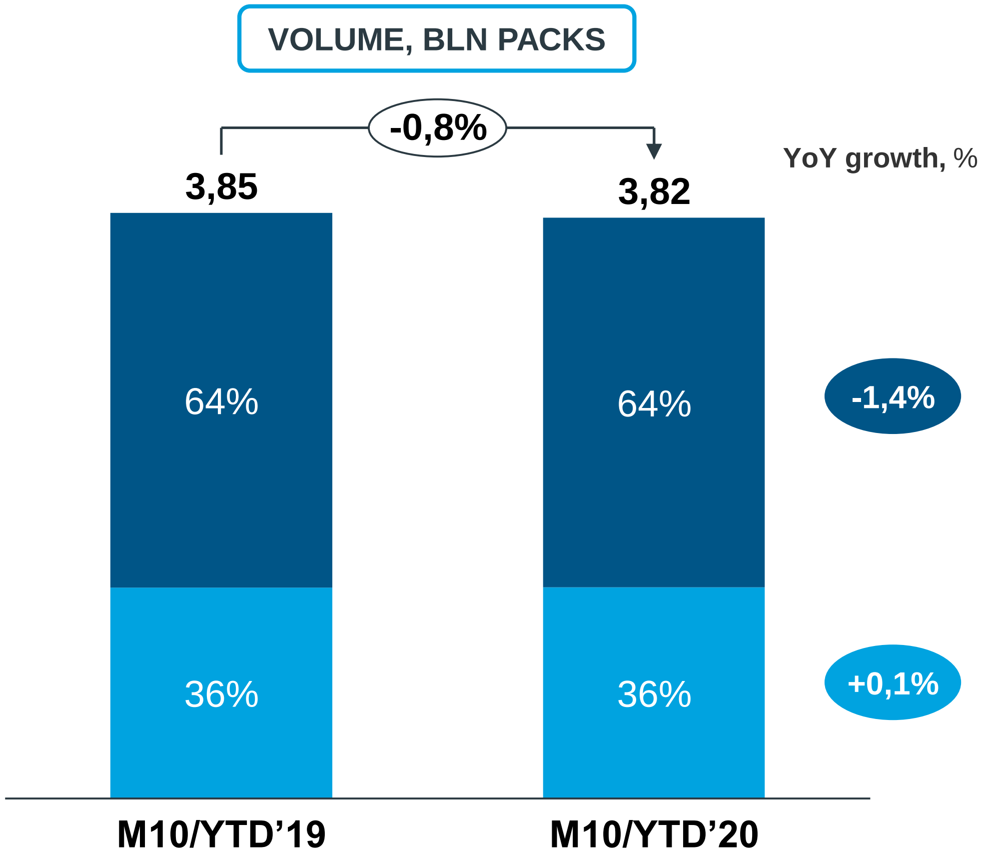
Indicator	RUB	USD	EUR	PACKS
Value M10/YTD’20, Bln.	1 252	17,5	15,5	4,5
Growth M10/YTD’20%	▲ **15%**	▲ **4,5%**	▲ **3,9%**	▲ **0,1%**

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

Russian pharma market growth in January-October 2020

Retail Sell-Out: Market grew by 7,6% in value and decreased by 0,8% in volume





OTC RX

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-October 2020

#	Corporation	**Market share, M10/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%	0%
1	SANOFI-AVENTIS	4,1%	10%	-1%
2	BAYER HEALTHCARE	3,9%	19%	1%
3	JOHNSON & JOHNSON	3,4%	32%	-4%
4	PFIZER	2,5%	9%	1%
5	MERCK SHARP DOHME	2,4%	36%	-8%
6	OTCPHARM	2,4%	36%	6%
7	NOVARTIS	2,4%	6%	-5%
8	STADA	2,3%	0%	-7%
9	SANDOZ	2,2%	18%	9%
10	GLAXOSMITHKLINE	2,2%	16%	-5%
11	SERVIER	2,1%	2%	-4%
12	TEVA	2,1%	0%	-2%
13	BIOCAD RF	2,1%	23%	-27%
14	ROCHE	2,0%	47%	-11%
15	ASTRAZENECA	2,0%	31%	24%

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

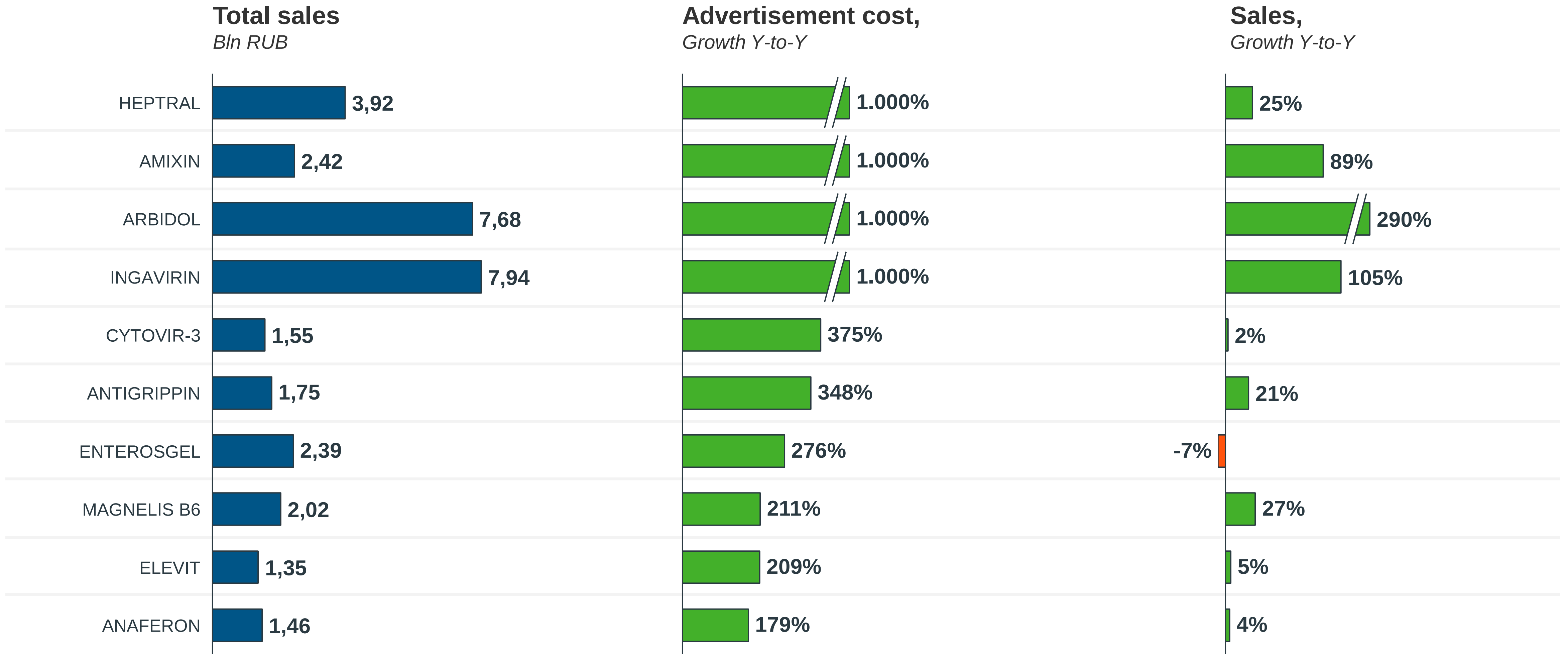
TOP-15 brands on Russian market, January-October 2020

#	Brand	Market share, M10/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%	0%
1	XARELTO	1,2%	69%	45%
2	OPDIVO	0,8%	87%	84%
3	KEYTRUDA	0,8%	95%	94%
4	REVLIMIDE	0,8%	25%	42%
5	SOVIGRIPP	0,7%	54%	-7%
6	INGAVIRIN	0,6%	119%	63%
7	ELIZARIA	0,6%	67%	68%
8	AVEGRA BIOCAD	0,6%	50%	21%
9	ARBIDOL	0,6%	303%	218%
10	ELIQUIS	0,5%	89%	99%
11	TIVICAY	0,5%	89%	157%
12	PRADAXA	0,5%	58%	57%
13	TOUJEO SOLOSTAR	0,5%	20%	15%
14	SPINRAZA	0,5%		
15	DETRALEX	0,4%	1%	-6%

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

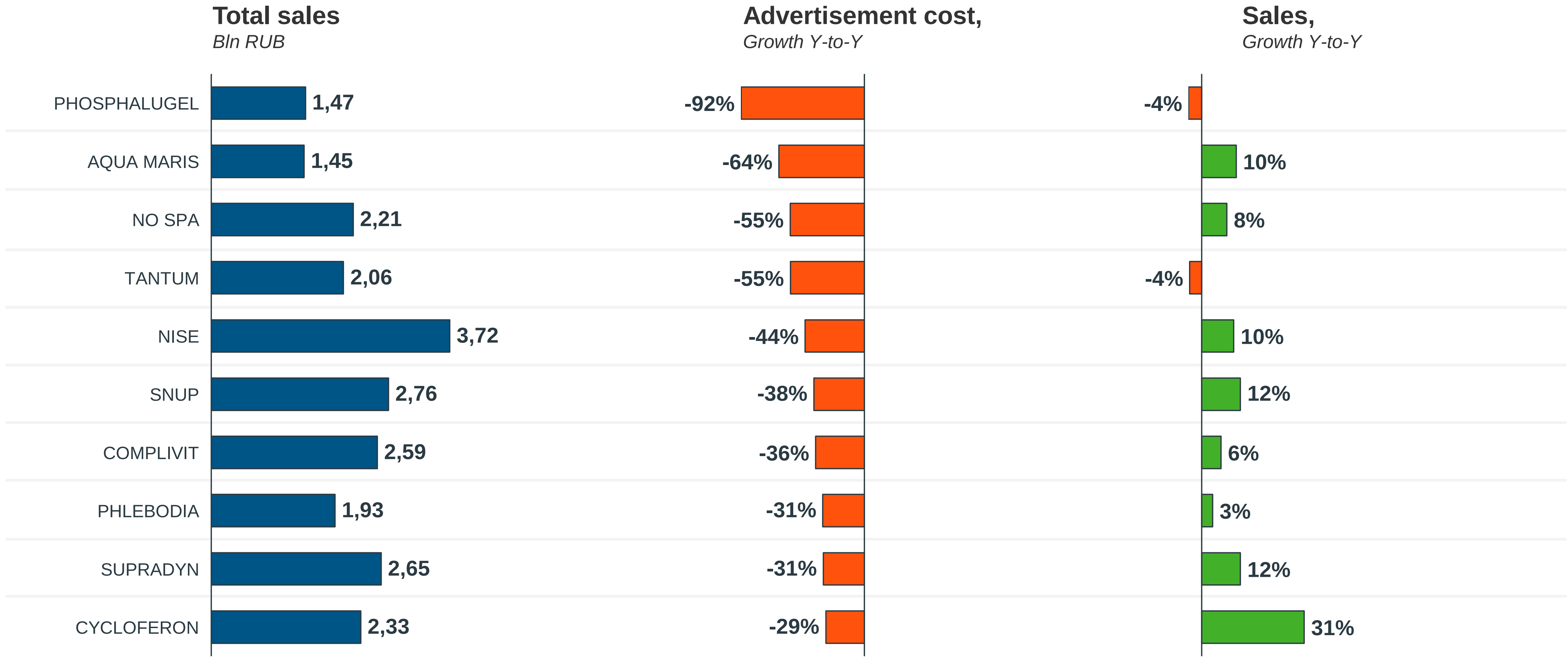
IQVIA

TOP-10 products by growth in advertisement investments in January-October 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-October 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 pharmacy chains
1-3Q 2020

TOP-10 pharmacy chains and pharmacy associations by sales of drugs (excluding reimbursement drugs supply) 1-3Q 2020

#	Category*	Regions	Pharmacy Chain / Pharmacy Association	Number of stores *(1 October 2020)*	Market share of pharmacy chain on the retail market, drugs only, 1-3Q 2020, %	Change in drug sales 1-3Q 2020 vs. 1-3Q 2019, %	The indicator of the relative sales of drugs, 1-3Q 2020 *(relative to the leading audited company)*	Average check, rub.	The rank of gross sales 1-3Q 2020 *(relative to the leading audited company)*
1	Fed.	81	ASNA	11 410	12,74%	13,8%	-	327	-
2	Fed.	56	Rigla[1]	3 073	5,93%	13,4%	1,000	564	1
3	Fed.	36	Erkafarm[2]	1 067	4,76%	13,0%	0,802	-	2
4	Int.	8	Pharmacy chain 36,6**[4]	1 431	4,09%	9,6%	0,690	1 065	
5	Fed.	52	April	1 765	3,63%	26,1%	0,611	529	
6	Fed.	10	Neo-farm	786	3,59%	16,6%	0,605	743	4
7	Fed.	27	Iris[3]	1 767	3,11%	4,7%	0,524	-	5
8	Fed.	37	Vita (Samara)	1 794	3,03%	2,6%	0,511	-	
9	Fed.	46	Planeta zdorov'ya**	1 736	2,95%	7,0%	0,498	-	8
10	Fed.	8	Farmland	1 290	2,22%	9,4%	0,375	514	9
		Total:		**26 119**	**46,05%**	**11,6%**			

*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) 1-3Q 2020

#	Pharmacy Chain	The indicator of the relative gross sales of drugs, 1-3Q 2020	Change in gross sales 1-3Q 2020 vs. 1-3Q 2019, %
1	Rigla[1]	1,000	14,3%
2	Erkafarm[2]	0,687	-2,2%
3	Pharmacy chain 36,6*[4]	0,614	5,7%
4	Neo-farm	0,558	16,8%
5	April	0,548	26,1%
6	Iris[3]	0,512	9,7%
7	Vita (Samara)	0,482	3,2%
8	Planeta zdorov'ya*	0,465	7,0%
9	Farmland	0,369	11,8%
10	Melodiya zdorov'ya[5]	0,277	24,1%

*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) 1-3Q 2020

#	Pharmacy Association / Service Platform	Head Office	Number of stores (1 October 2020)	Market share of pharmacy association on the retail market, drugs only, 1-3Q 2020, %	Change of drug sales 1-3Q 2020 vs. 1-3Q 2019, %	The indicator of the relative sales of drugs, 1-3Q 2020
1	ASNA	Moscow	11 410	12,74%	13,8%	1,000
2	ProApteka	Moscow	6 319	8,27%	18,9%	0,538
3	MFU[1]	St. Petersburg	4 957	6,04%	44,2%	0,452
4	Sozvezdiye	Moscow	4 371	3,45%	99,9%	0,263
5	VESNA[2]	St. Petersburg	1 468	1,40%	14,0%	0,107
6	Zdravcity	Moscow	14 880	0,30%	84,8%	0,024

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

Rating of Russian distributors

1-3Q 2020

TOP-10 distributors on the market of gross sales, 1-3Q 2020

#	Distributor	Market share in gross sales, %		Change in gross sales 1-3Q 2020/1-3Q 2019, %
		1-3Q 2020	1-3Q 2019	
1	Pulse	12,2%	12,6%	10,5%
2	Protek	11,9%	13,2%	3,0%
3	Katren	11,5%	12,1%	7,8%
4	R-Pharm	6,1%	4,8%	43,9%
5	Pharmkomplekt	5,2%	5,0%	18,3%
6	FK Grand Kapital	4,4%	4,0%	27,2%
7	BSS	3,3%	3,4%	10,9%
8	Profitmed	2,7%	2,8%	9,7%
9	Biotek	2,3%	1,6%	65,7%
10	Asfadis	2,1%	2,4%	1,4%
	Total	**61,6%**	**62,0%**	**19,8%**

Source: based on data from distributors participating in the rating

TOP-10 distributors on the budget market,1-3Q 2020

#	Distributor	Distributor Type	Head Office	Relative volume of budget sales, 1-3Q 2020	Share of budget sales from the gross sales volume, %
1	R-Pharm	National	Moscow	1,000	59%
2	Pharmstandard**	National	Moscow	0,894	-
3	Biotek	National	Moscow	0,502	77%
4	Irvin 2	Regional	Moscow	0,464	98%
5	BSS	National	S.Petersburg	0,403	44%
6	Lancet	Interregional	Moscow	0,310	57%
7	Protek	National	Moscow	0,300	9%
8	GDP	Interregional	Moscow	0,235	46%
9	Farmimex*	Interregional	Moscow	0,197	40%
10	Severo-zapad	Interregional	S.Petersburg	0,147	96%

*Expert assessment
**Data based on analysis of IQVIA tender base

Source: IQVIA, based on data from distributors participating in the rating

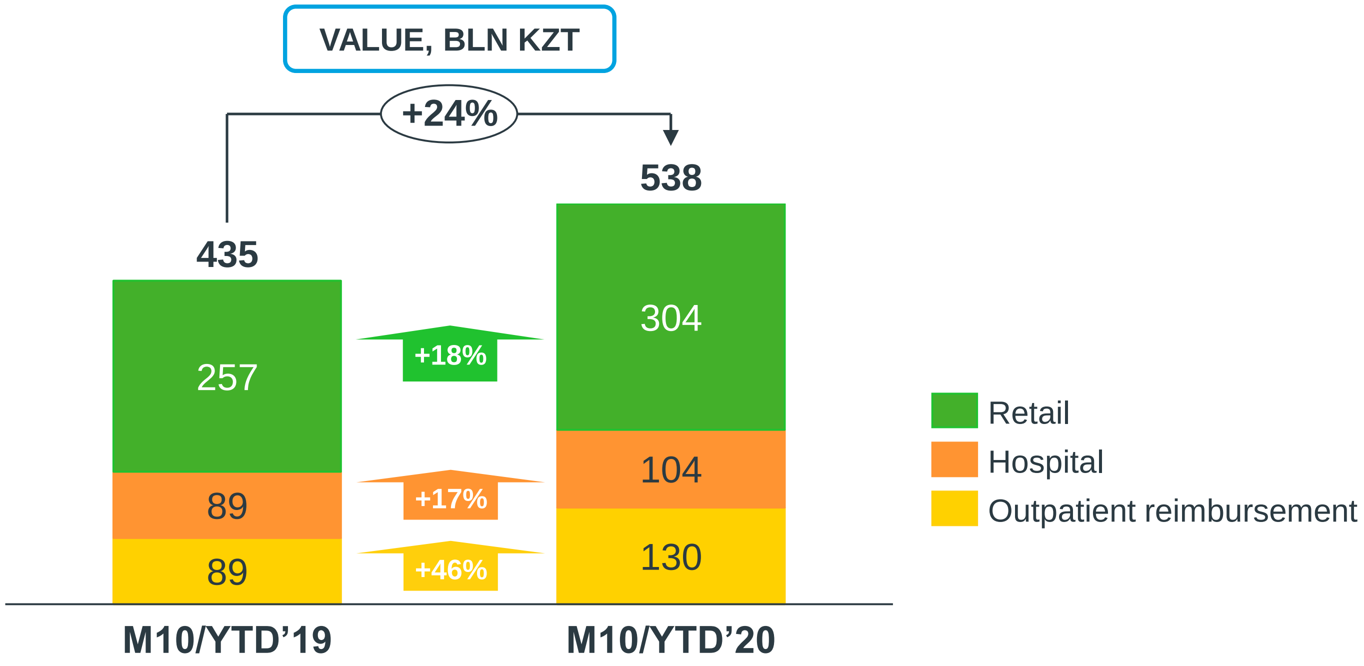
TOP-10 distributors on the market of secondary sales,1-3Q 2020

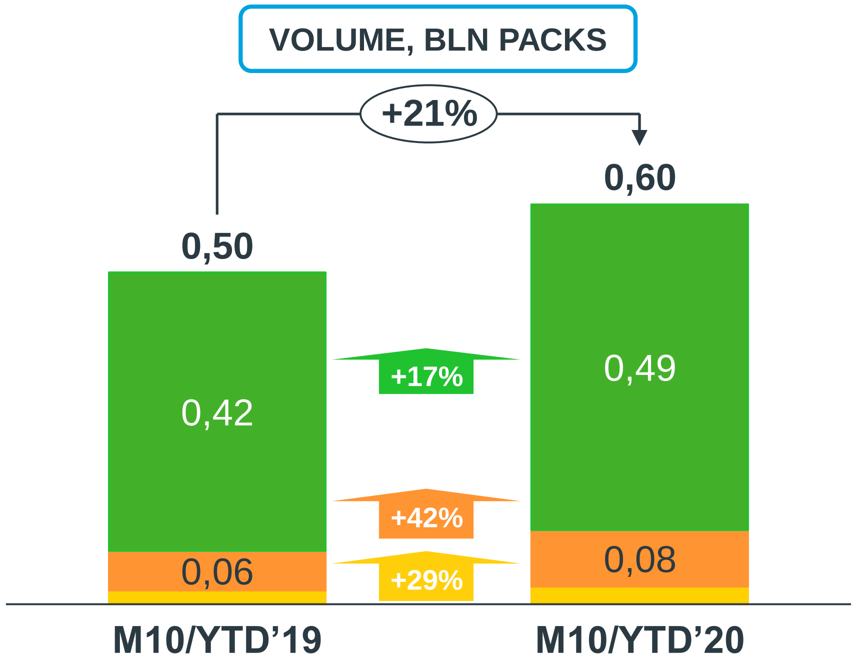
#	Distributor	Distributor Type	Head Office	Relative volume of secondary distribution, 1-3Q 2020	Share of secondary distribution sales from the gross sales volume, %
1	R-Pharm	National	Moscow	1,000	33%
2	Firma Euroservice	Interregional	Moscow	0,469	84%
3	Lancet	Interregional	Moscow	0,382	40%
4	Pharmkomplekt	National	N.Novgorod	0,353	14%
5	Asfadis	Interregional	Moscow	0,314	30%
6	Pulse	National	Khimki	0,241	4%
7	Protek	National	Moscow	0,238	4%
8	Pharmservice	Regional	Krasnodar	0,218	76%
9	Farmacevt	Interregional	Rostov-on-don	0,205	53%
10	Katren	National	Novosibirsk	0,162	3%

Source: based on data from distributors participating in the rating

Kazakhstan pharma market growth in January-October 2020

Market grew by 24% in value and by 21% in volume





Indicator	KZT	USD	EUR	PACKS
Value M10/YTD'20, Bln.	538	1,31	1,16	0,60
Growth M10/YTD'20%	▲ 24%	▲ 15%	▲ 15%	▲ 21%

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

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

#	Corporation	**Market share, M10/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%	24%	21%
1	SANTO	6,2%	32%	16%
2	SANOFI-AVENTIS	4,8%	1%	3%
3	NOBEL-AFF	4,5%	37%	34%
4	JOHNSON & JOHNSON	3,8%	38%	3%
5	TAKEDA	3,4%	20%	4%
6	BAYER HEALTHCARE	3,2%	23%	4%
7	ABBOTT	2,6%	25%	29%
8	GLAXOSMITHKLINE	2,5%	3%	19%
9	ROCHE	2,4%	53%	65%
10	TEVA	2,4%	22%	20%
11	PFIZER	2,3%	6%	-2%
12	NOVARTIS	2,1%	33%	-29%
13	STADA	1,9%	8%	10%
14	SANDOZ GROUP	1,9%	15%	20%
15	SERVIER	1,8%	-4%	-12%

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

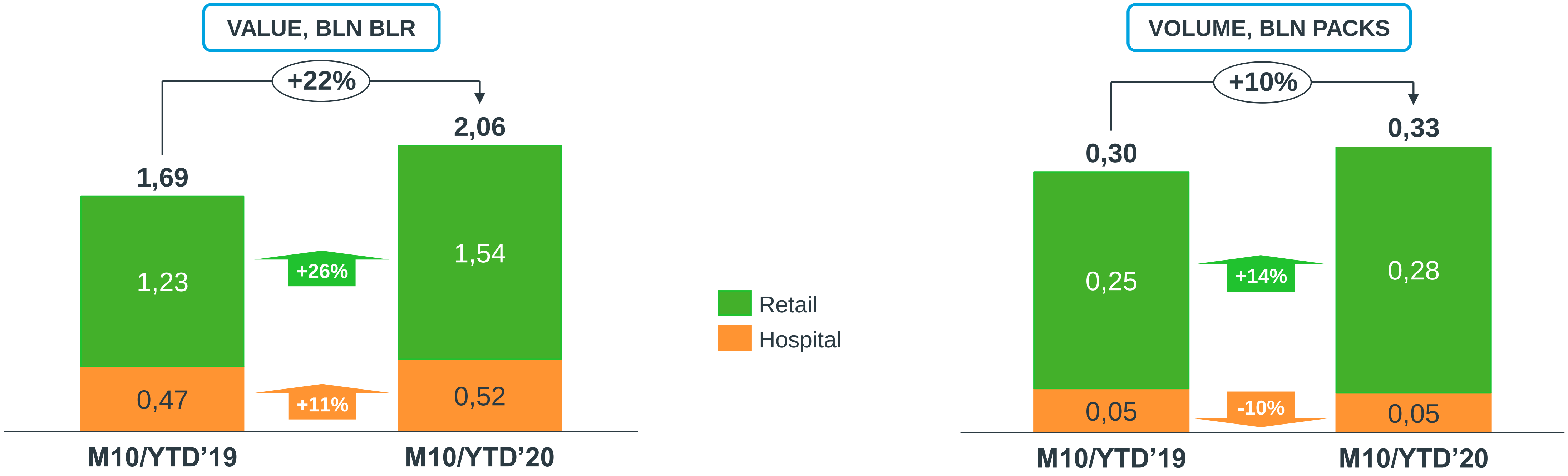
TOP-15 brands on Kazakhstan market, January-October 2020

#	Brand	Market share, M10/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%	24%	21%
1	PREVENAR	1,4%	-5%	1%
2	HEXAXIM	1,0%	-1%	-1%
3	NATRIUM CHLORIDUM	0,9%	134%	103%
4	XARELTO	0,9%	183%	175%
5	IMMUTIN	0,8%	8%	14%
6	CORONIM	0,7%	43%	43%
7	VACC POLIO	0,7%		
8	SIMPONI	0,7%	50%	50%
9	IMMUNATE	0,7%	34%	18%
10	HERCEPTIN	0,7%	84%	84%
11	PHYSIOTENS	0,7%	58%	75%
12	ELAPRASE	0,6%	61%	61%
13	METOJECT	0,6%	22%	22%
14	CANEPHRON	0,6%	38%	25%
15	KREON	0,6%	17%	13%

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

Belarus pharma market growth in January-October 2020

Market grew by 22% in value and by 10% in volume



Indicator	BLR	USD	EUR	PACKS
Value M10/YTD'20, Bln.	2,06	0,85	0,76	0,33
Growth M10/YTD'20%	▲ 22%	▲ 5,4%	▲ 4,8%	▲ 10%

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

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

#	Corporation	Market share, M10/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%	22%	10%
1	BELMEDPREP BEL	7,7%	9%	10%
2	BORISOV.ZMP BEL	6,5%	7%	9%
3	LEKFARM BELARUS	5,3%	31%	31%
4	BAYER HEALTHCARE	4,1%	61%	28%
5	PHARMLAND BEL	3,4%	30%	10%
6	SANOFI-AVENTIS	3,0%	19%	21%
7	SANDOZ GROUP	2,9%	31%	24%
8	ROCHE	2,8%	92%	52%
9	MENARINI	2,3%	35%	16%
10	KRKA	2,3%	29%	17%
11	MINSKINTERCAPS	2,2%	19%	10%
12	GLAXOSMITHKLINE	2,2%	41%	21%
13	PHARMTECHNOLOG.BEL	2,2%	10%	-6%
14	SERVIER	2,1%	25%	18%
15	GEDEON RICHTER	2,0%	11%	9%

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

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

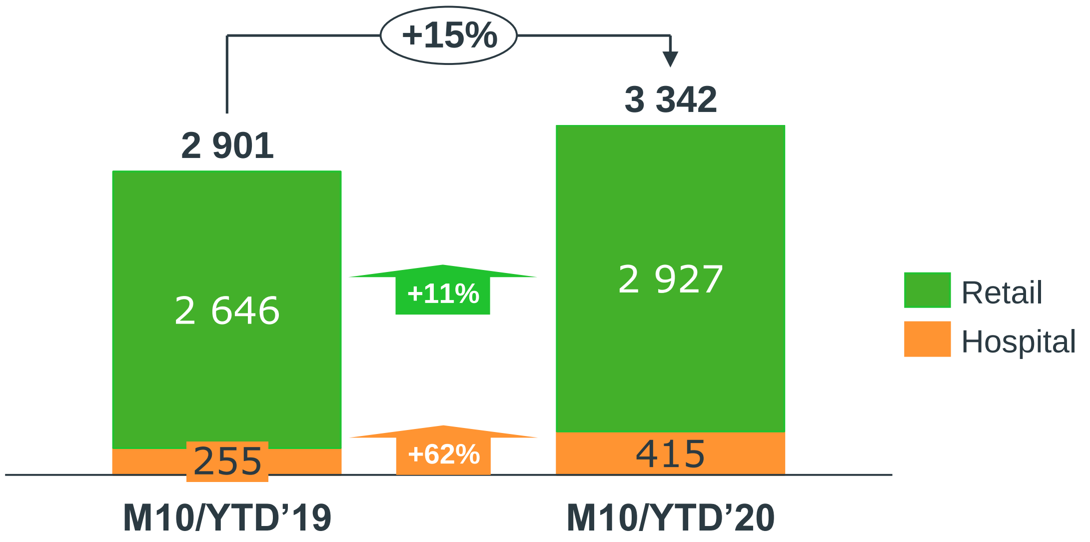
#	Brand	**Market share, M10/YTD'20** *In percent in Local Currency*	**Value growth / decline** *In percent in Local Currency*	**Volume growth / decline** *In percent in Packs*
	Total pharma market	100,0%	22%	10%
1	XARELTO	1,9%	102%	66%
2	NATRIUM CHLORIDUM	0,7%	-7%	-12%
3	CEREPRO	0,7%	33%	21%
4	ARPETOL	0,6%	292%	270%
5	GRIPPOL PLUS	0,6%	-8%	-12%
6	PERJETA	0,5%	56%	33%
7	AMLESSA	0,5%	93%	73%
8	PROTAMIN-INSUL.	0,5%	85%	86%
9	GLICLAZIDE MV	0,4%	2%	-38%
10	B-MAB	0,4%	57%	78%
11	MEROPENEM-TPH	0,4%	30%	31%
12	LINEZOLID	0,4%	-54%	32%
13	ZELBORAF	0,4%	68%	341%
14	AUGMENTIN	0,4%	35%	22%
15	FLUSTOP	0,4%	202%	197%

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

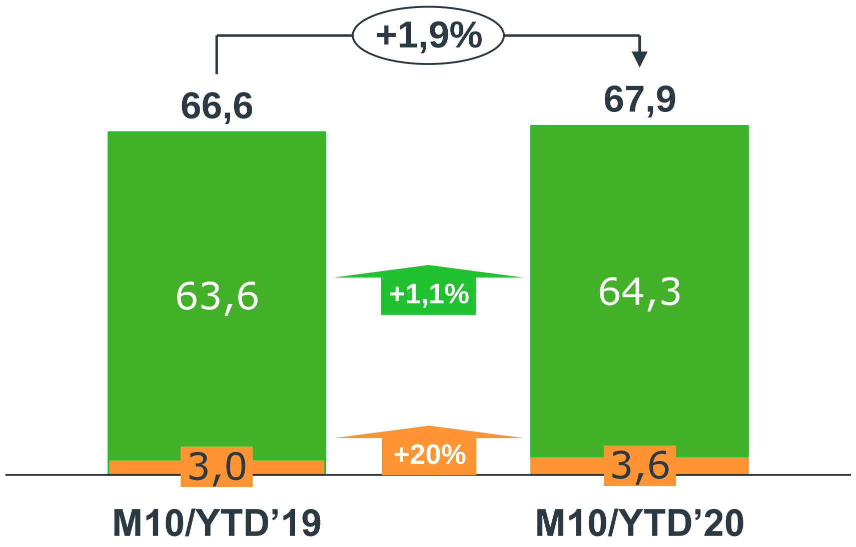
Moldova pharma market growth in January-October 2020

Market grew by 15% in value and by 1,9% in volume

VALUE, MLN LEU



VOLUME, MLN PACKS



Indicator	LEU	USD	EUR	PACKS
Value M10/YTD'20, Mln.	3 342	193,4	170,8	67,9
Growth M10/YTD'20%	▲ **15%**	▲ **17%**	▲ **16%**	▲ **1,9%**

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

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

	Corporation	Market share, M10/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%	2%
1	BALKAN PHARMACEUTICALS	6,5%	132%	96%
2	MENARINI	6,4%	10%	1%
3	KRKA	5,6%	13%	7%
4	GEDEON RICHTER	4,7%	-1%	-4%
5	NOVARTIS	3,8%	10%	-24%
6	GLAXOSMITHKLINE	3,4%	6%	-10%
7	SANOFI-AVENTIS	2,7%	17%	-5%
8	WORLD MEDICINE	2,4%	4%	3%
9	TAKEDA	2,2%	-6%	0%
10	NOBEL ILAC SAN TUR	1,9%	23%	6%
11	BAYER HEALTHCARE	1,9%	18%	8%
12	EGIS	1,6%	9%	0%
13	GRINDEX	1,5%	14%	17%
14	BILIM ILAC SANAYI	1,5%	-1%	-5%
15	ROCHE	1,5%	136%	8%

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

IQVIA

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

#	Brand	Market share, M10/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%	2%
1	GLIVEC	1,4%	50%	50%
2	CARDIOMAGNYL	0,8%	9%	4%
3	SODIUM CHLORIDE	0,7%	-12%	-22%
4	SIRTURO	0,7%	222%	222%
5	LORISTA	0,7%	47%	42%
6	PROTAPHANE	0,7%	0%	2%
7	DEXALGIN	0,7%	0%	-7%
8	SIOFOR	0,6%	8%	9%
9	LERKAMEN	0,6%	54%	53%
10	GROPRINOSIN	0,6%	58%	50%
11	NIMESIL	0,6%	14%	11%
12	THERAFLU	0,6%	64%	49%
13	SERETIDE	0,6%	42%	50%
14	HERCEPTIN	0,5%	234%	238%
15	DIROTON	0,5%	7%	8%

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

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