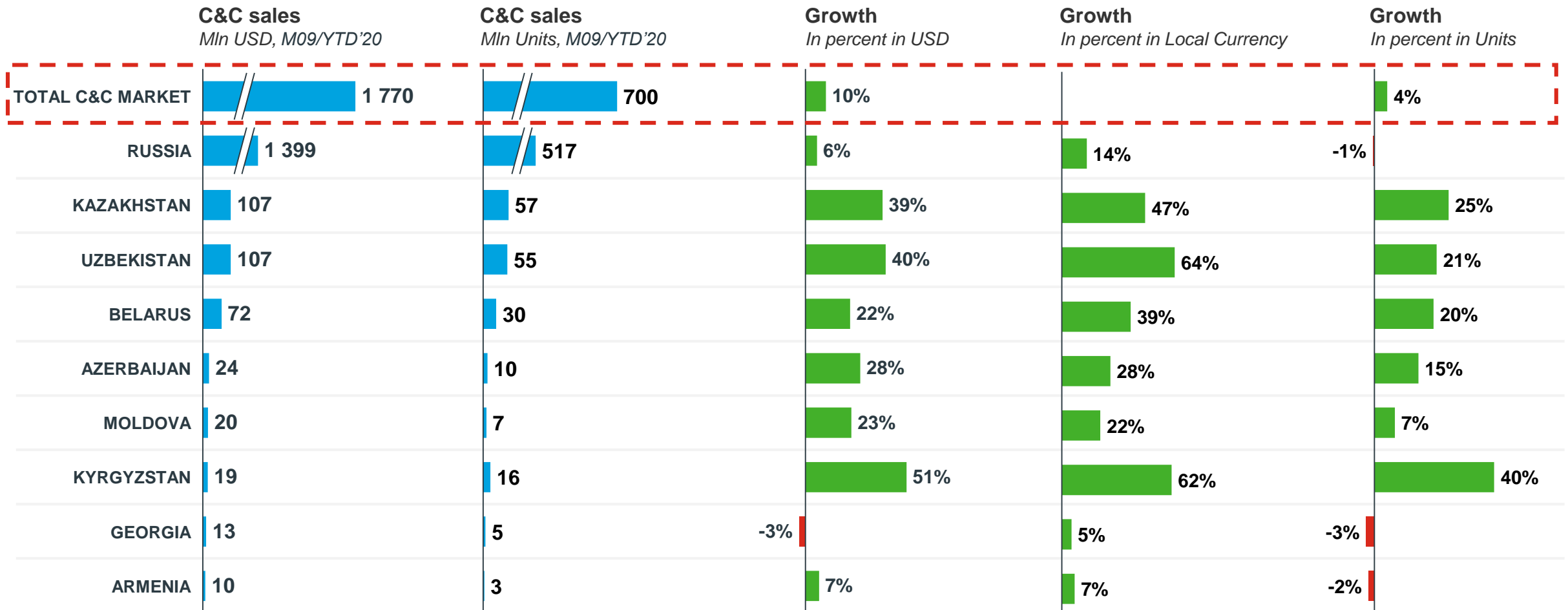


Facts from IQVIA

M09 2020

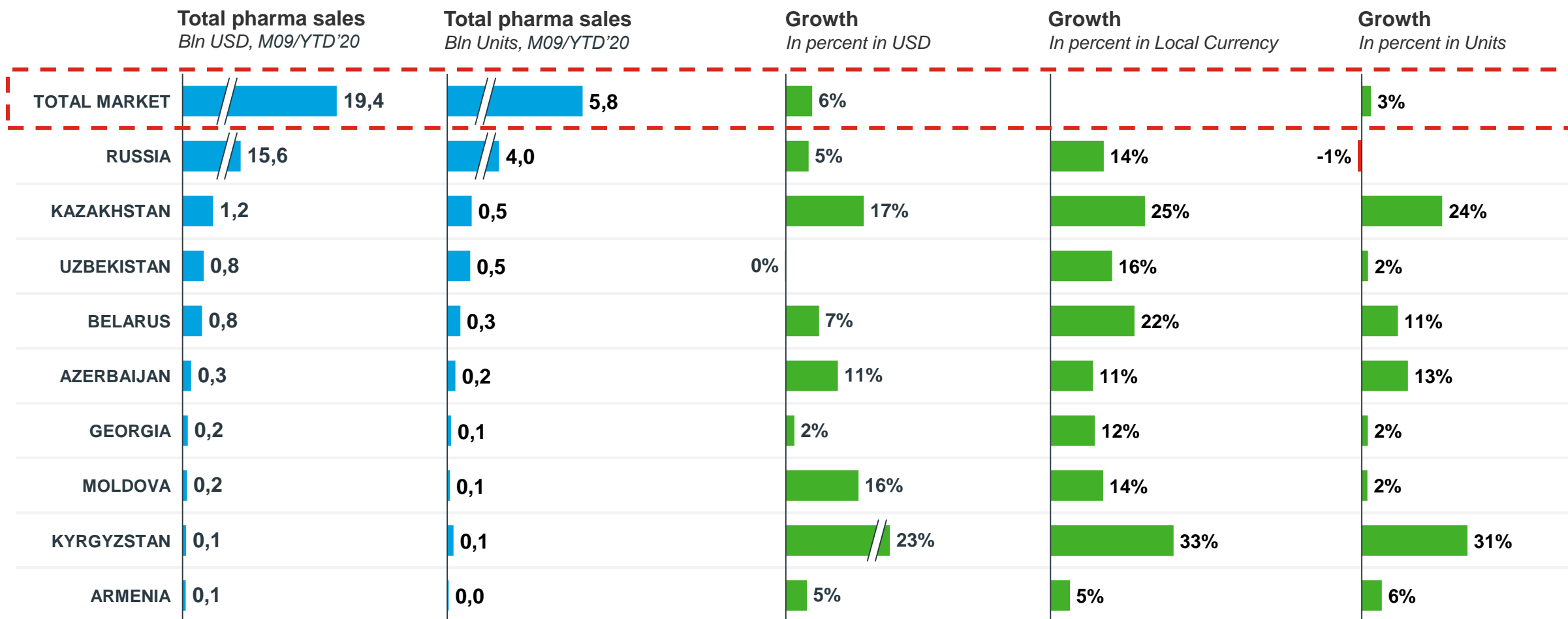
EAEU & CIS, Russia Cough&Cold category in January-September 2020, Value in Mln. USD and Units

C&C increases by 10% in USD and by 4% in volume



EAEU & CIS, Russia Countries ranking in January-September 2020, Total market, Value in Bln. USD and Units

Total Market increases by 6% in USD and by 3% in volume



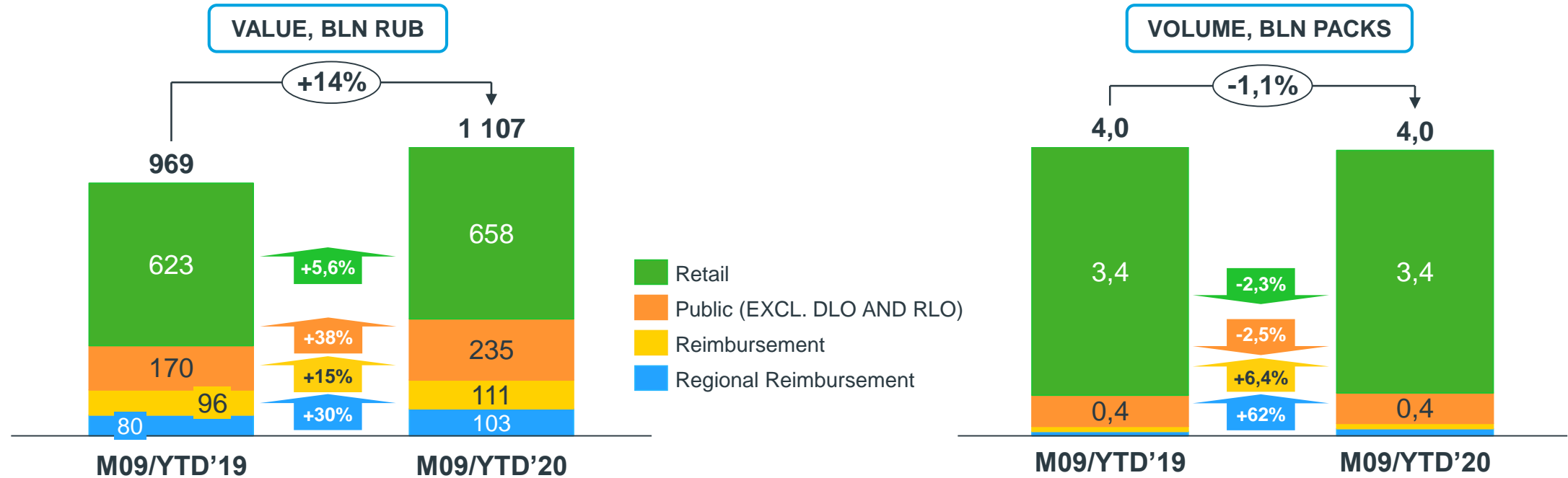
Source: IQVIA database (TRD prices)

Source: IQVIA databases. Retail and Non-Retail (excluding food supplements and diagnostic agents), TRD Prices . Azerbaijan, Georgia and Armenia – retail only. Mongolia – Import



Russian pharma market growth in January-September 2020

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

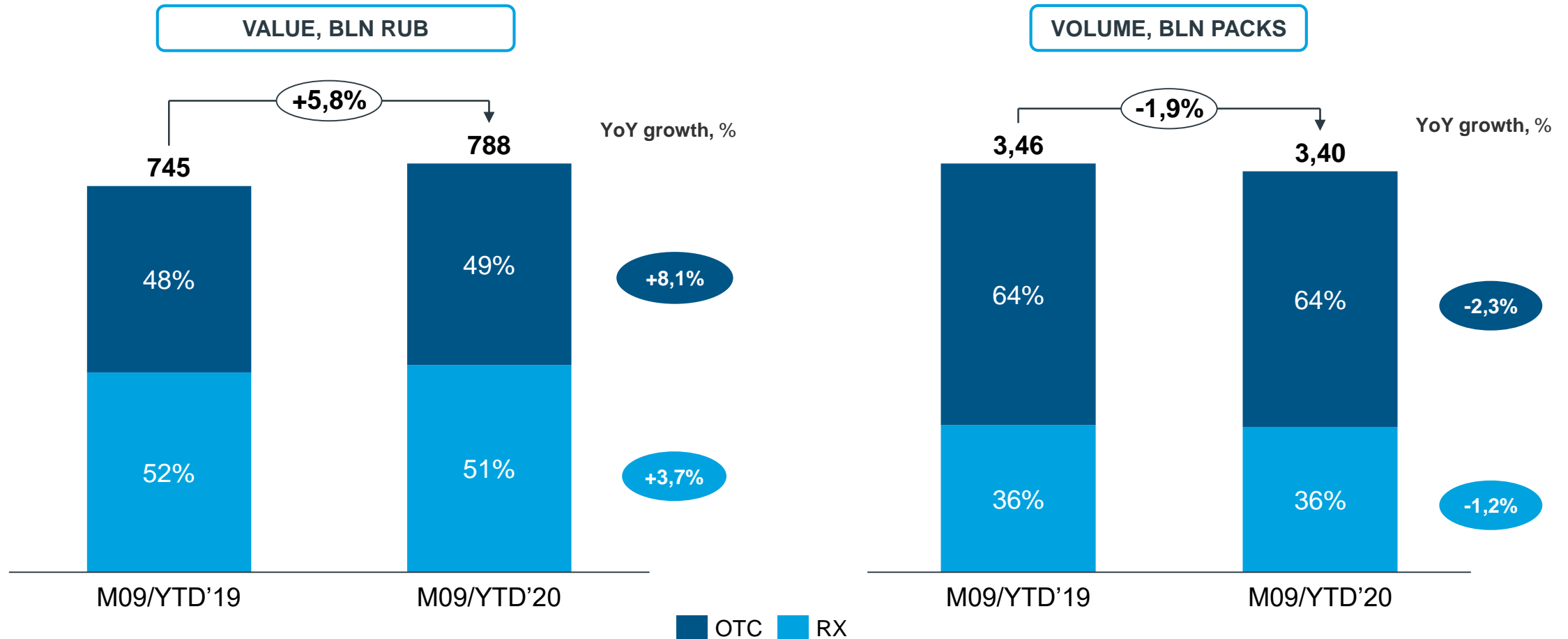


Indicator	RUB	USD	EUR	PACKS
Value M09/YTD'20, Bln.	1 107	16	14	4,0
Growth M09/YTD'20%	▲ 14%	▲ 4,9%	▲ 5,0%	▼ -1,1%



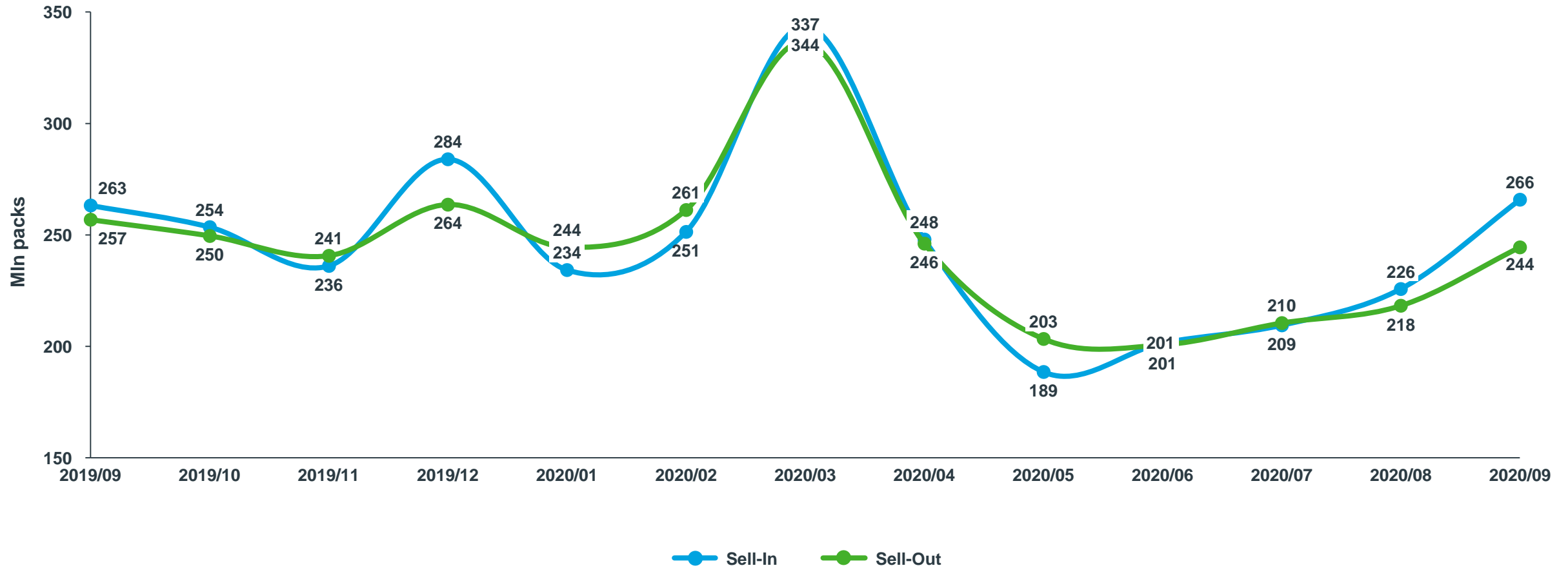
Russian pharma market growth in January-September 2020

Retail Sell-Out: Market grew by 5,8% in value and decreased by 1,9% in volume





Sell-In vs Sell-Out, OTC registered drugs



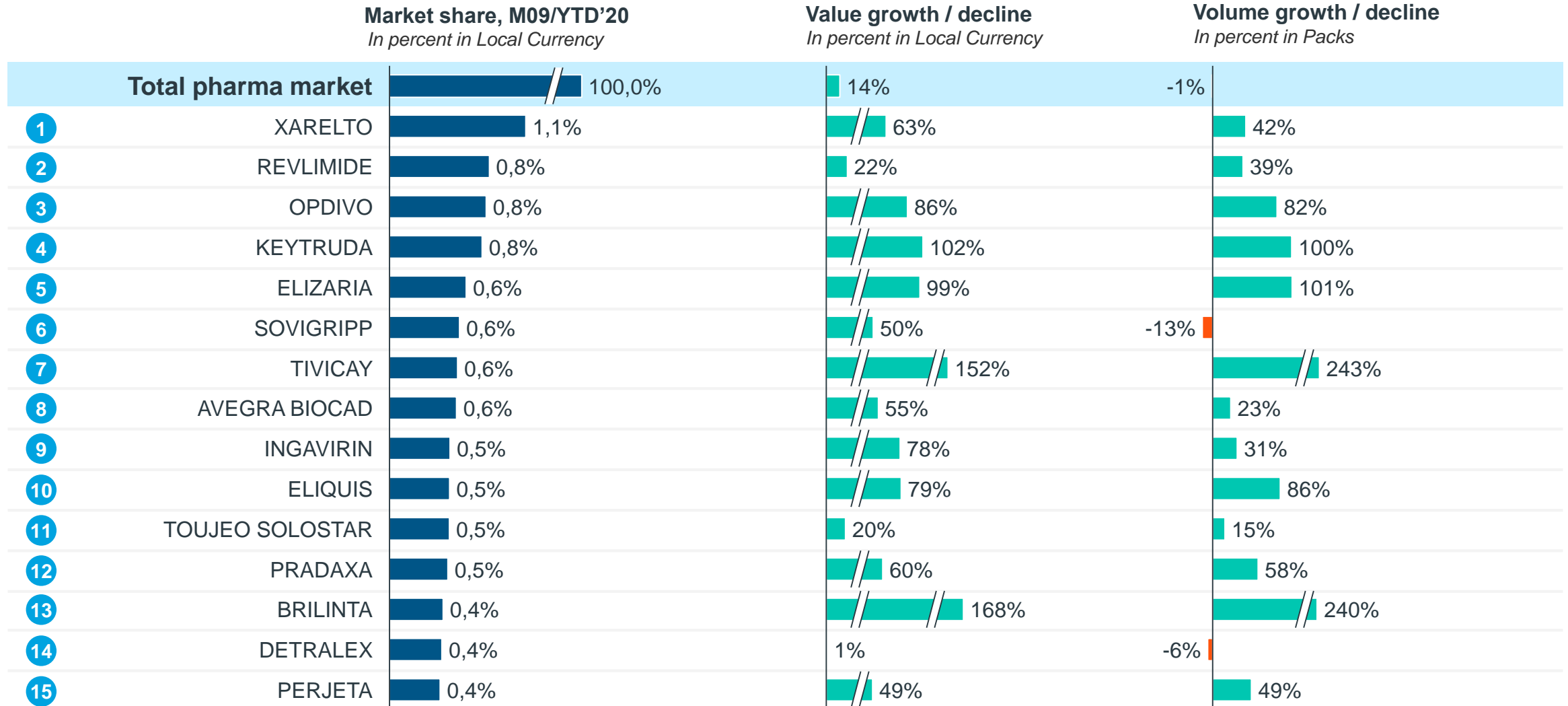


TOP-15 corporations on Russian market, January-September 2020

	Market share, M09/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%	14%	-1%
1 SANOFI-AVENTIS	4,2%	11%	-1%
2 BAYER HEALTHCARE	3,8%	18%	-1%
3 JOHNSON & JOHNSON	3,5%	32%	-2%
4 PFIZER	2,5%	7%	-2%
5 MERCK SHARP DOHME	2,5%	40%	-8%
6 NOVARTIS	2,5%	7%	-4%
7 OTCPHARM	2,3%	31%	4%
8 STADA	2,3%	-1%	-8%
9 GLAXOSMITHKLINE	2,2%	21%	-7%
10 SERVIER	2,1%	3%	-4%
11 BIOCAD RF	2,1%	28%	-30%
12 TEVA	2,1%	-1%	-4%
13 SANDOZ	2,1%	12%	3%
14 ASTRAZENECA	2,0%	31%	23%
15 ROCHE	2,0%	49%	-9%

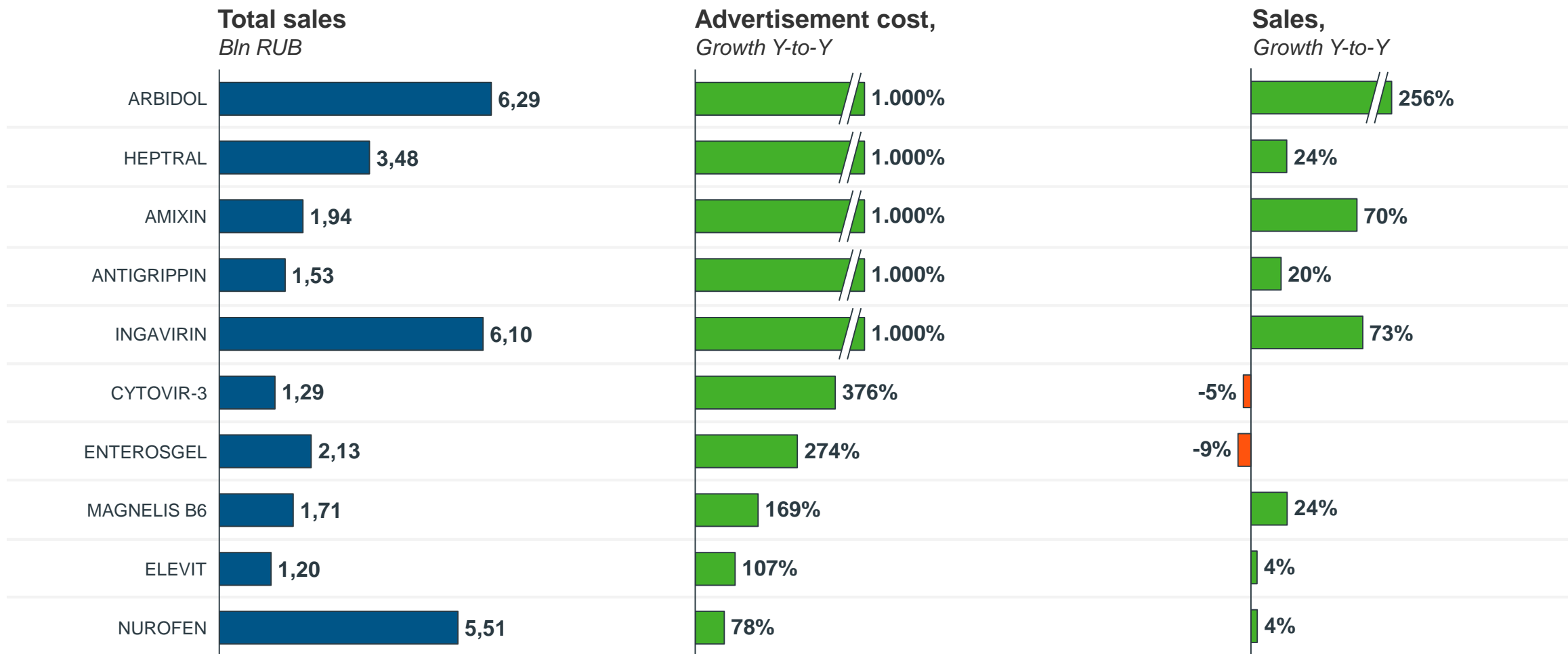


TOP-15 brands on Russian market, January-September 2020



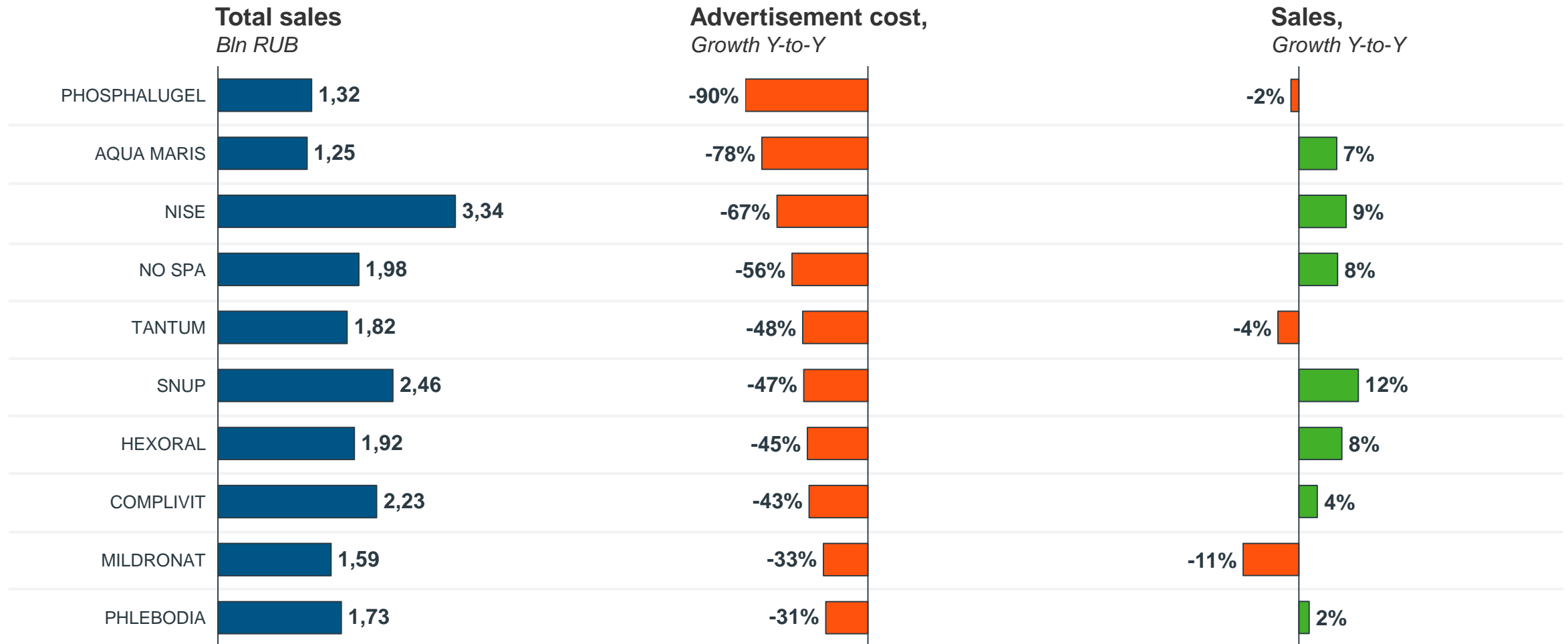
Source: IQVIA databases. Retail, Public, DLO, RLO (excluding food supplements and diagnostic agents), TRD Prices

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

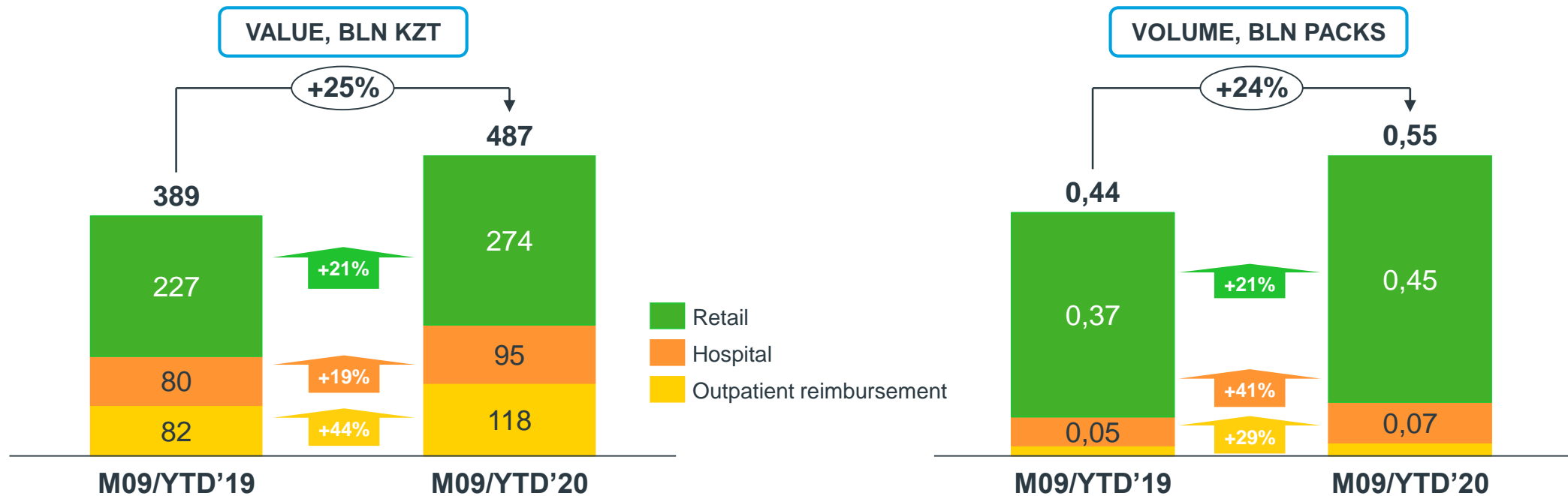


The rank is calculated among TOP-200 Brands by sales with advertising cost greater than 50 mln RUB
 Source: IQVIA databases. Pharmatrend, Mediascope data, FIN Prices



Kazakhstan pharma market growth in January-September 2020

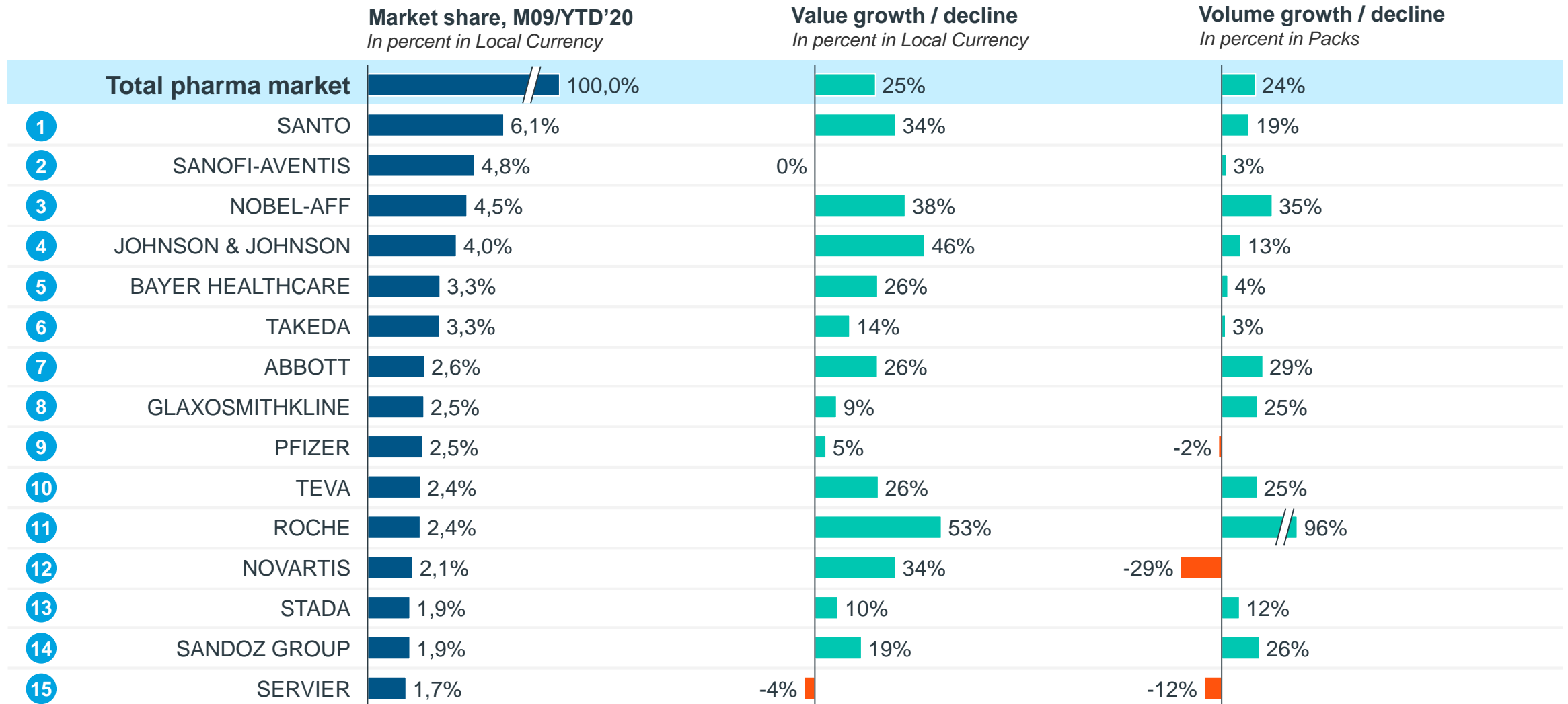
Market grew by 25% in value and by 24% in volume



Indicator	KZT	USD	EUR	PACKS
Value M09/YTD'20, Bln.	487	1,19	1,06	0,55
Growth M09/YTD'20%	▲ 25%	▲ 17%	▲ 17%	▲ 24%



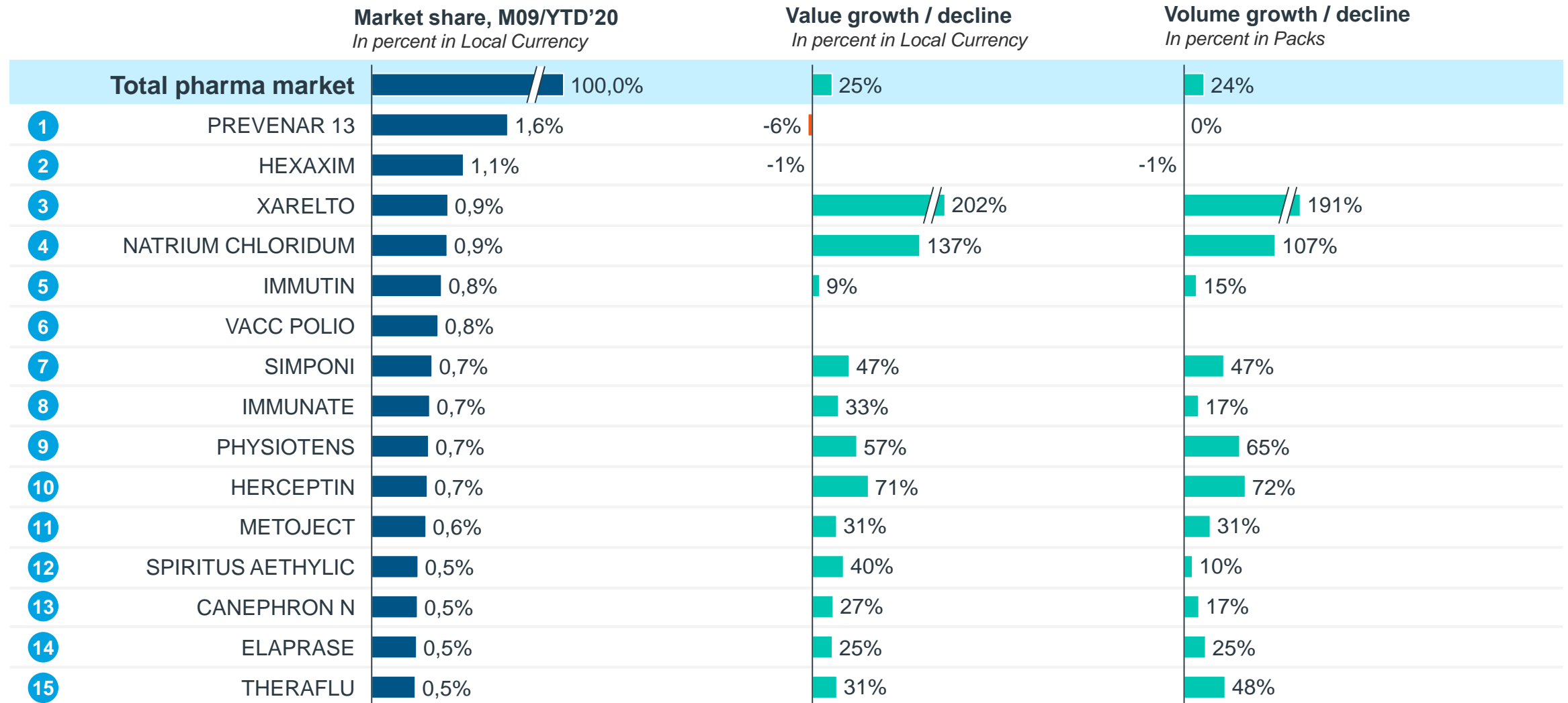
TOP-15 corporations on Kazakhstan market, January-September 2020



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



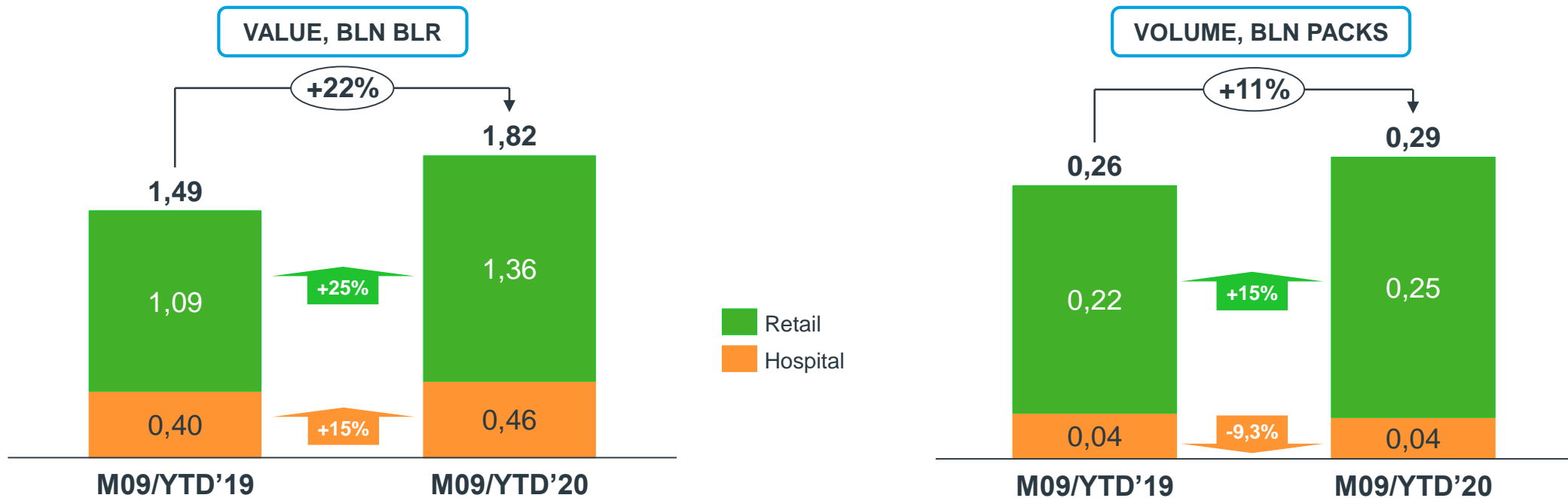
TOP-15 brands on Kazakhstan market, January-September 2020





Belarus pharma market growth in January-September 2020

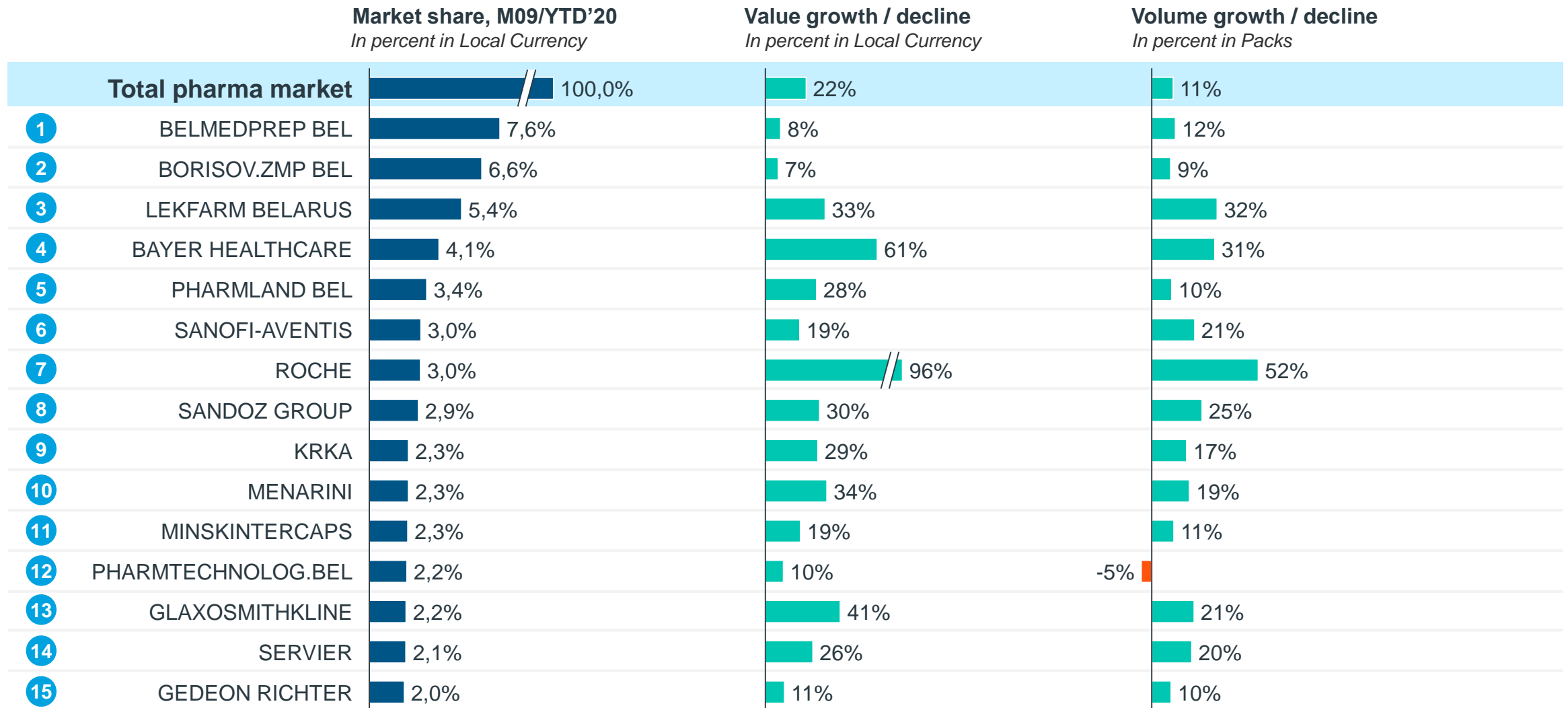
Market grew by 22% in value and by 11% in volume



Indicator	BLR	USD	EUR	PACKS
Value M09/YTD'20, Bln.	1,82	0,76	0,68	0,29
Growth M09/YTD'20%	▲ 22%	▲ 7,2%	▲ 7,3%	▲ 11%

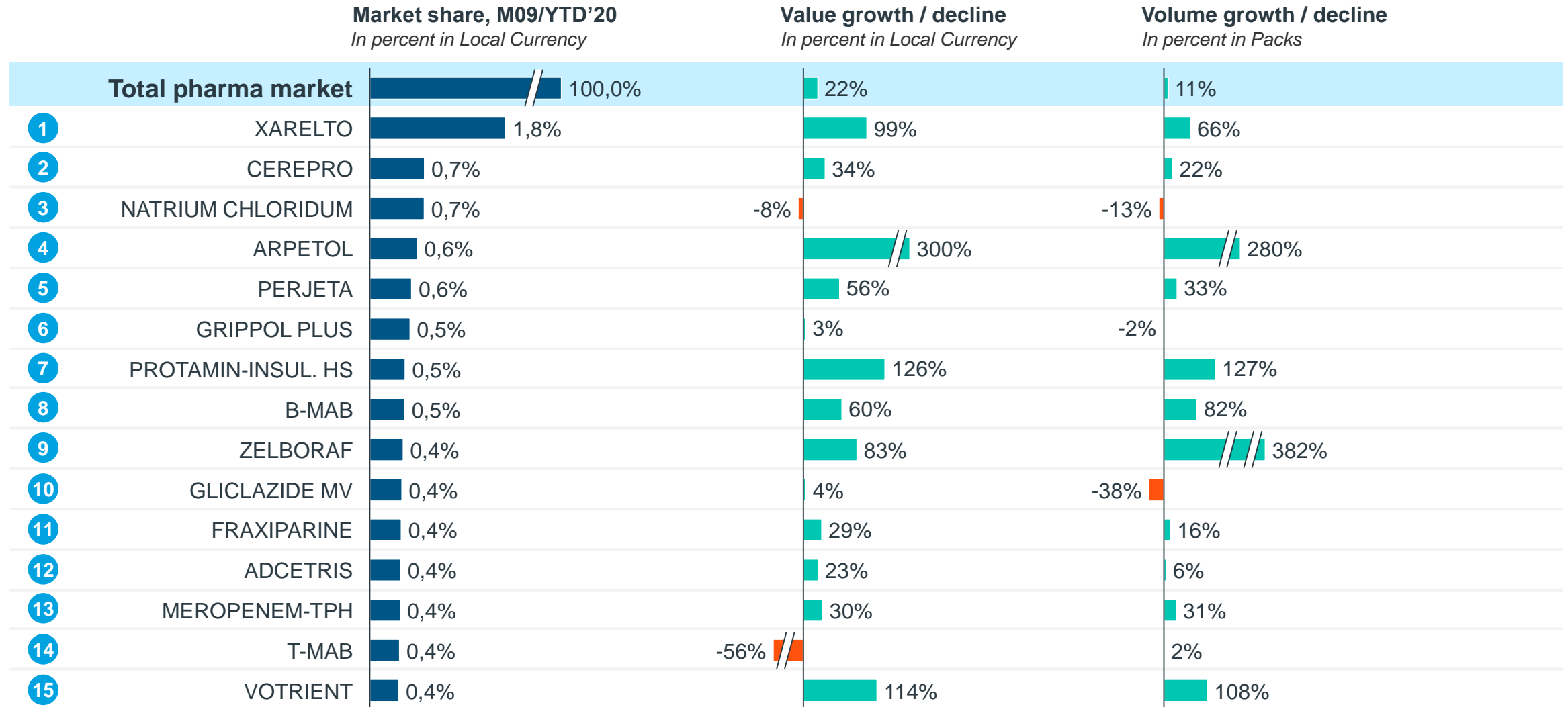


TOP-15 corporations on Belarus market, January-September 2020





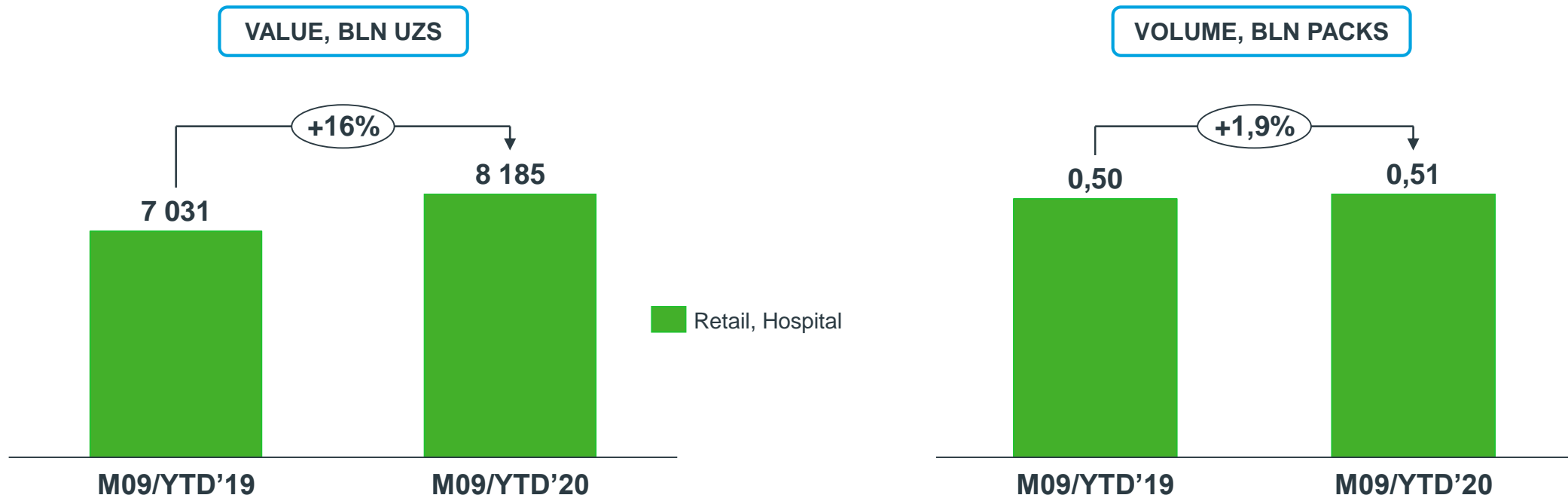
TOP-15 brands on Belarus market, January-September 2020





Uzbekistan pharma market growth in January-September 2020

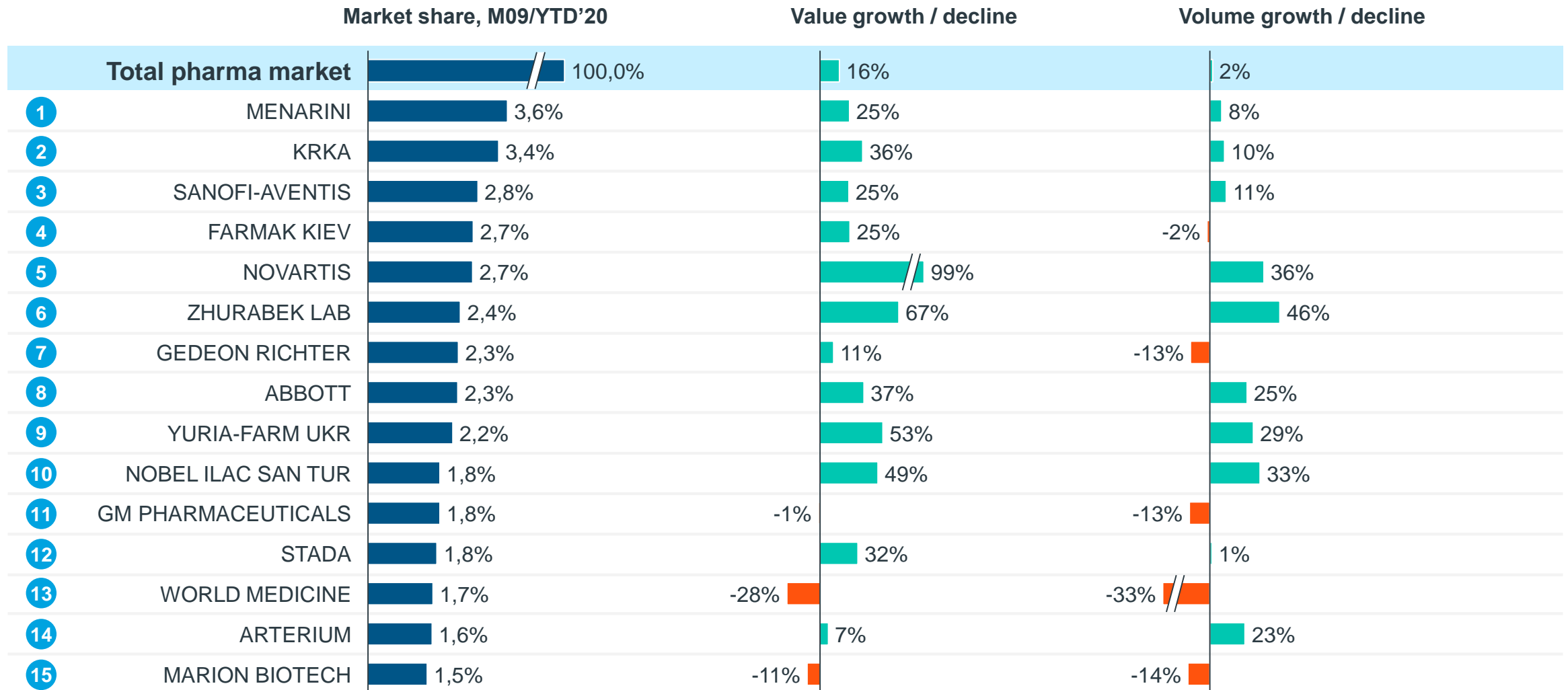
Market grew by 16% in value and by 1,9% in volume



Indicator	UZS	USD	EUR	PACKS
Value M09/YTD'20, Bln.	8 185	0,82	0,73	0,51
Growth M09/YTD'20%	▲ 16%	▼ -0,2%	▲ 0,03%	▲ 1,9%

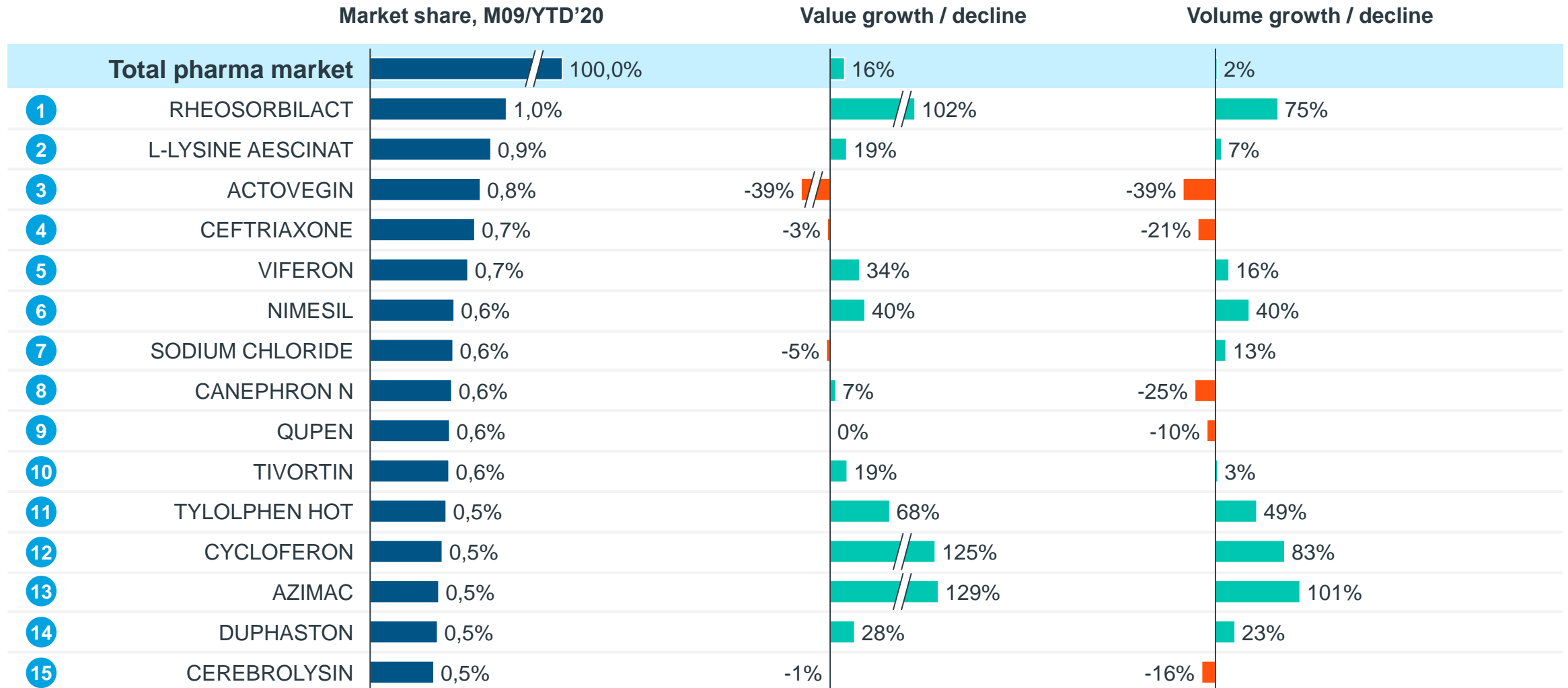


TOP-15 corporations on Uzbekistan market, January-September 2020





TOP-15 brands on Uzbekistan market, January-September 2020

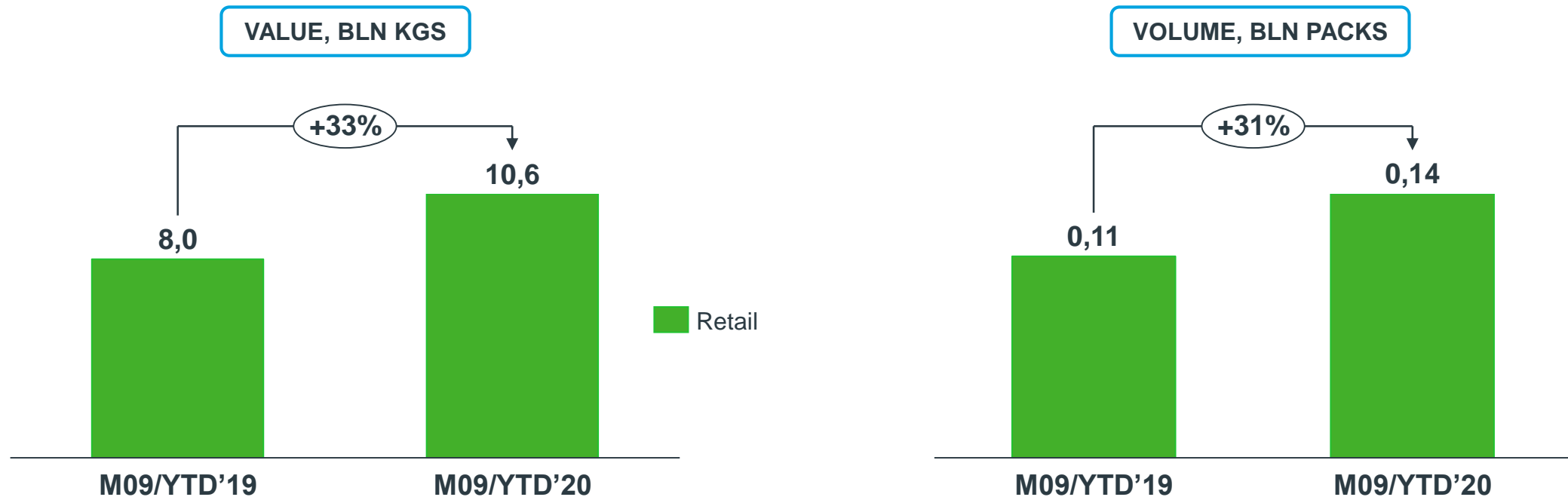


Source: IQVIA databases. Retail and Hospital Market (exclude food supplements and diagnostic agents), TRD Prices



Kyrgyzstan pharma market growth in January-September 2020

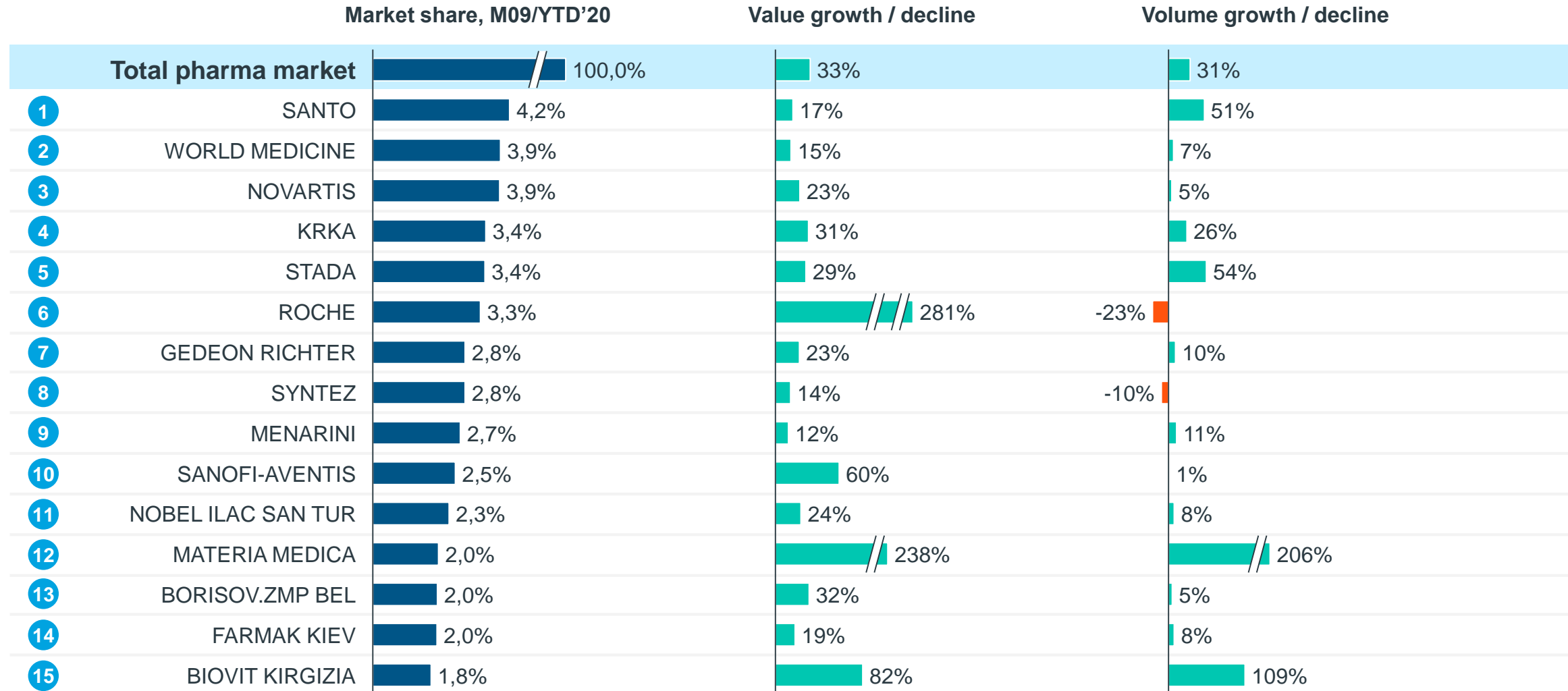
Market grew by 33% in value and by 31% in volume



Indicator	KGS	USD	EUR	PACKS
Value M09/YTD'20, Bln.	10,6	0,14	0,12	0,14
Growth M09/YTD'20%	▲ 33%	▲ 23%	▲ 23%	▲ 31%



TOP-15 corporations on Kyrgyzstan market, January-September 2020



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



TOP-15 brands on Kyrgyzstan market, January-September 2020

	Market share, M09/YTD'20	Value growth / decline	Volume growth / decline
Total pharma market	100,0%	33%	31%
1 TYLOL HOT	1,3%	23%	8%
2 HEPARIN	1,1%	658%	188%
3 CEFTRIAXONE	1,0%	78%	58%
4 SODIUM CHLORIDE	1,0%	41%	21%
5 TRIMOL	1,0%	310%	405%
6 CARDIOMAGNYL	1,0%	81%	90%
7 CLEXANE	0,9%	10 589%	3 205%
8 ERGOFERON	0,9%	667%	713%
9 CEFAZOLIN-AKOS	0,7%	31%	30%
10 HERCEPTIN	0,7%	873%	220%
11 ACTEMRA	0,7%	2 677%	789%
12 ANAFERON FOR KIDS	0,6%	134%	125%
13 AMOXICILLIN	0,6%	23%	-19%
14 ACTOVEGIN	0,6%	-11%	-16%
15 TROMBOPOL	0,6%	191%	143%

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