

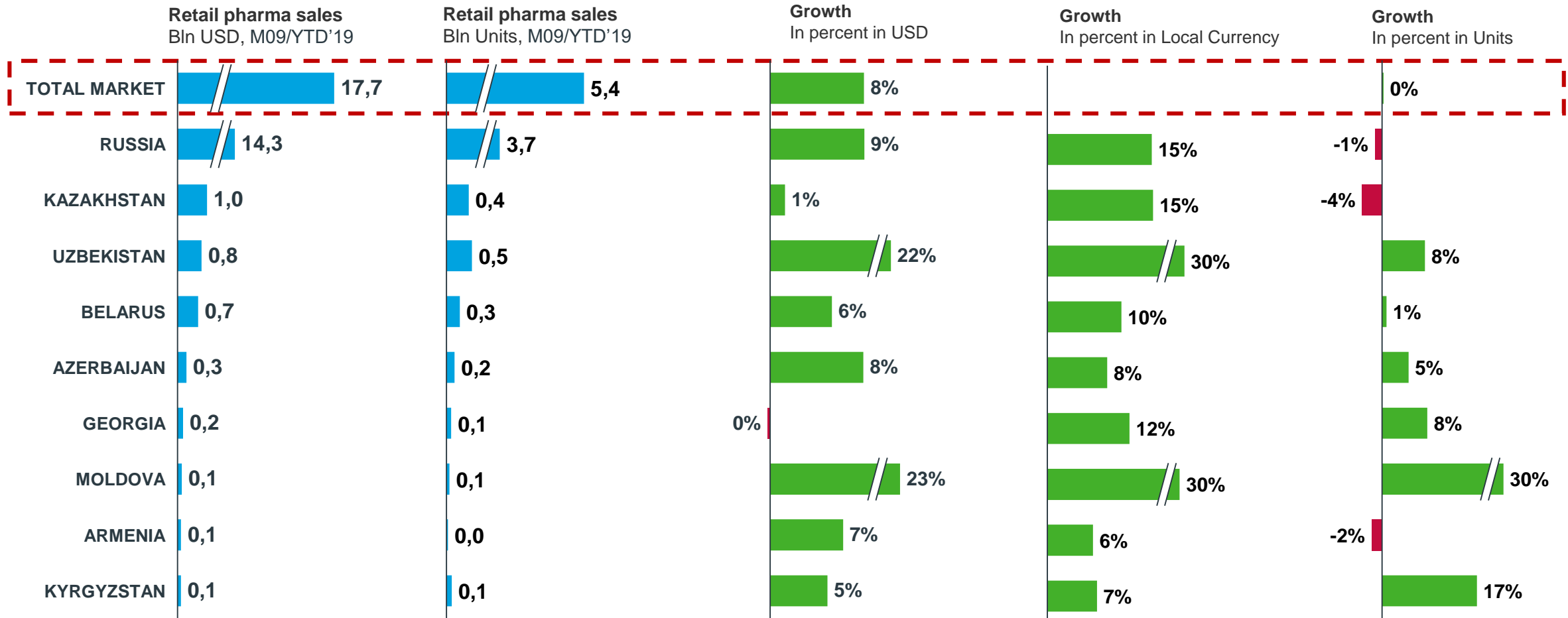


Facts from IQVIA

M09 2019

EAEU & CIS, Russia Countries ranking in January-September 2019, Total market, Value in Bln. USD and Units

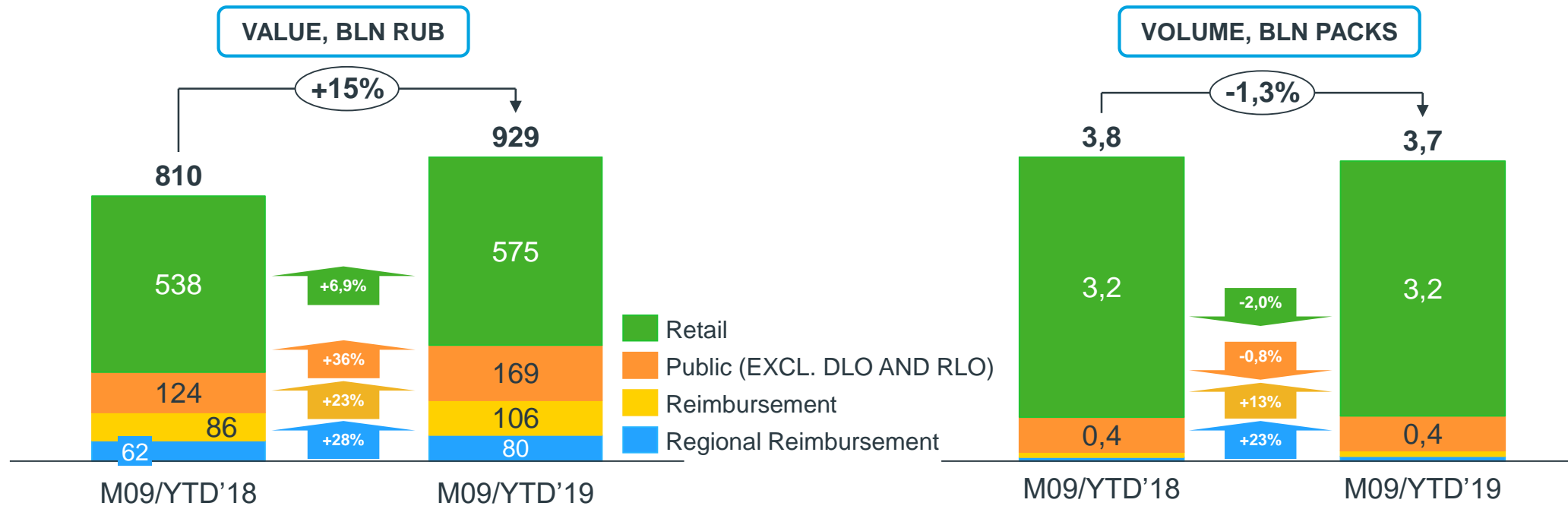
Total Market increases by 8% in USD and by 0,3% in volume





Russian pharma market growth in January-September 2019

Market grew by 15% in value and decreased by 1,3% in volume

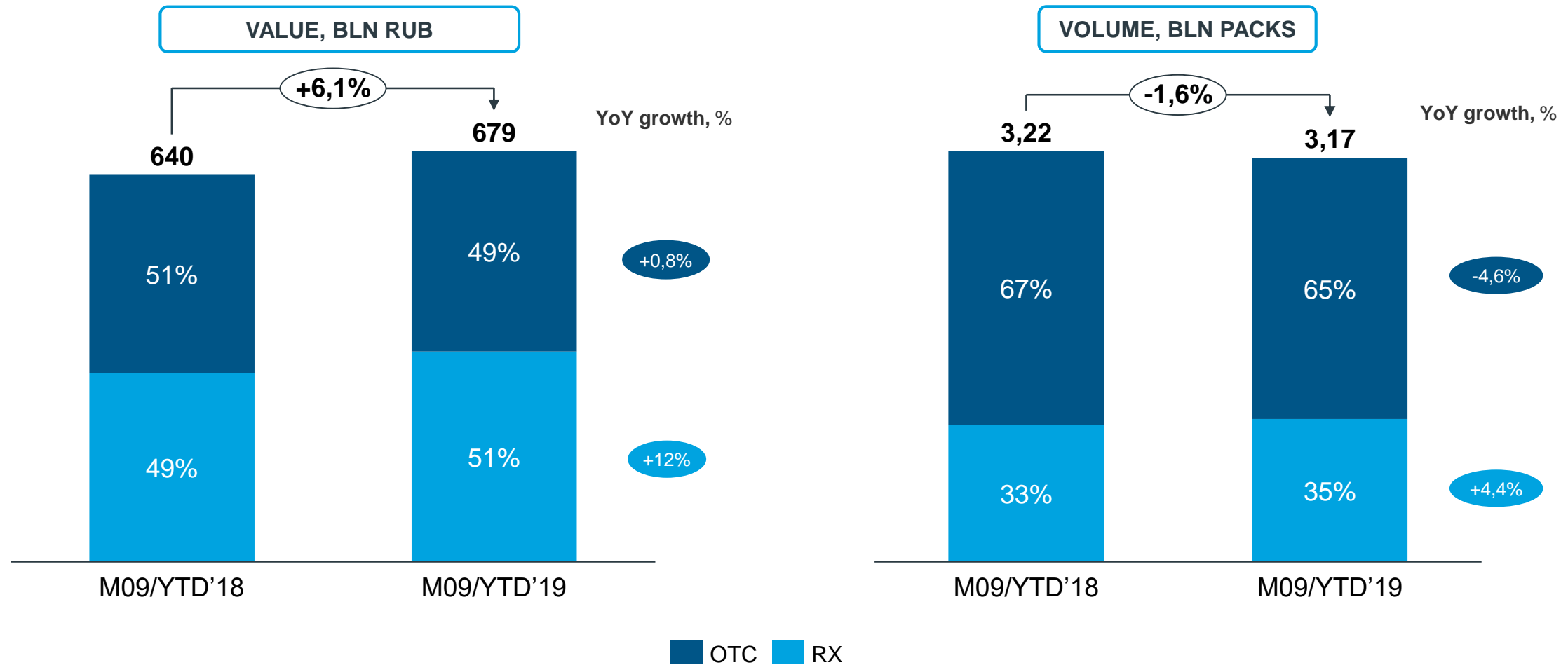


Indicator	RUB	USD	EUR	PACKS
Value M09/YTD'19, Bln.	929	14,3	12,7	3,7
Growth M09/YTD'19%	▲ 15%	▲ 8,5%	▲ 15%	▼ -1,3%



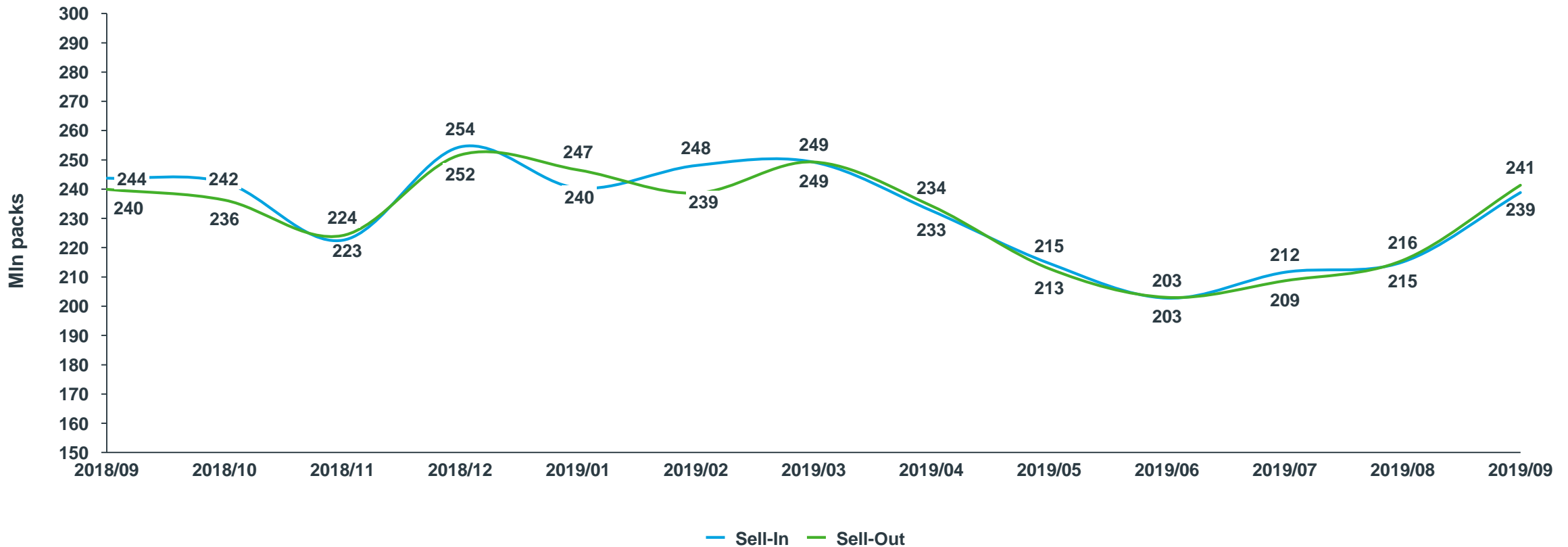
Russian pharma market growth in January-September 2019

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



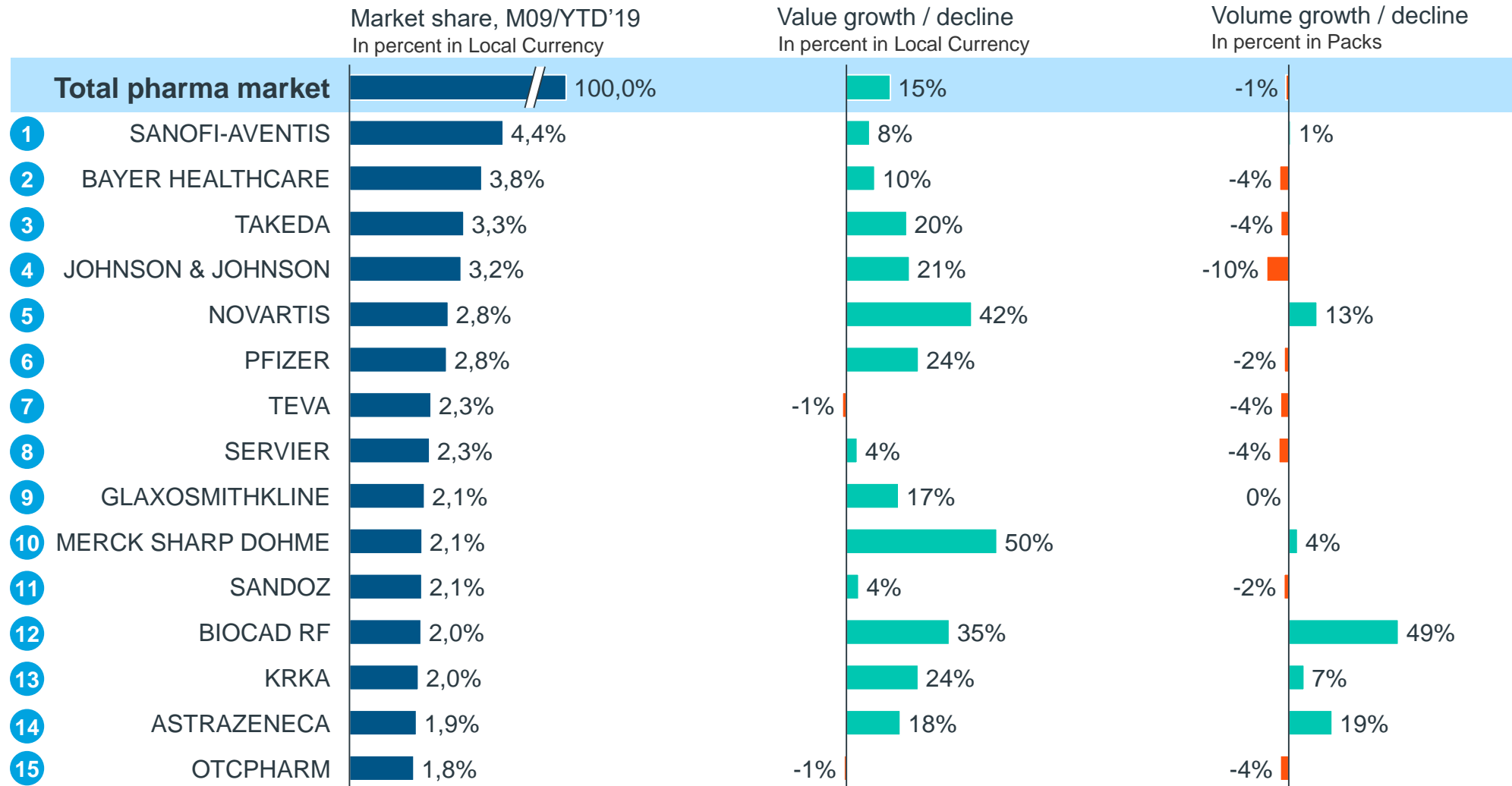


Sell-In vs Sell-Out, OTC registered drugs



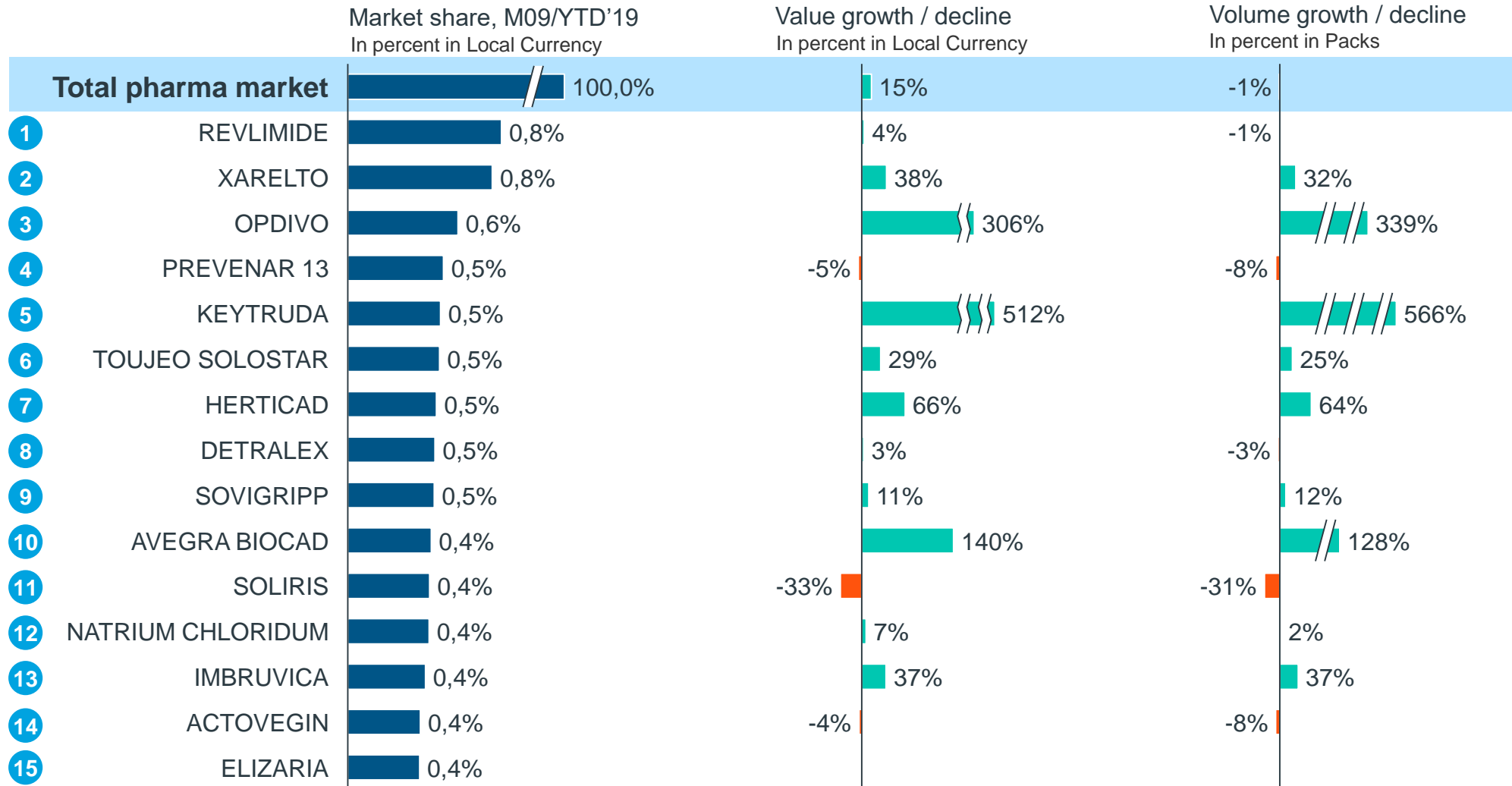


TOP-15 corporations on Russian market, January-September 2019



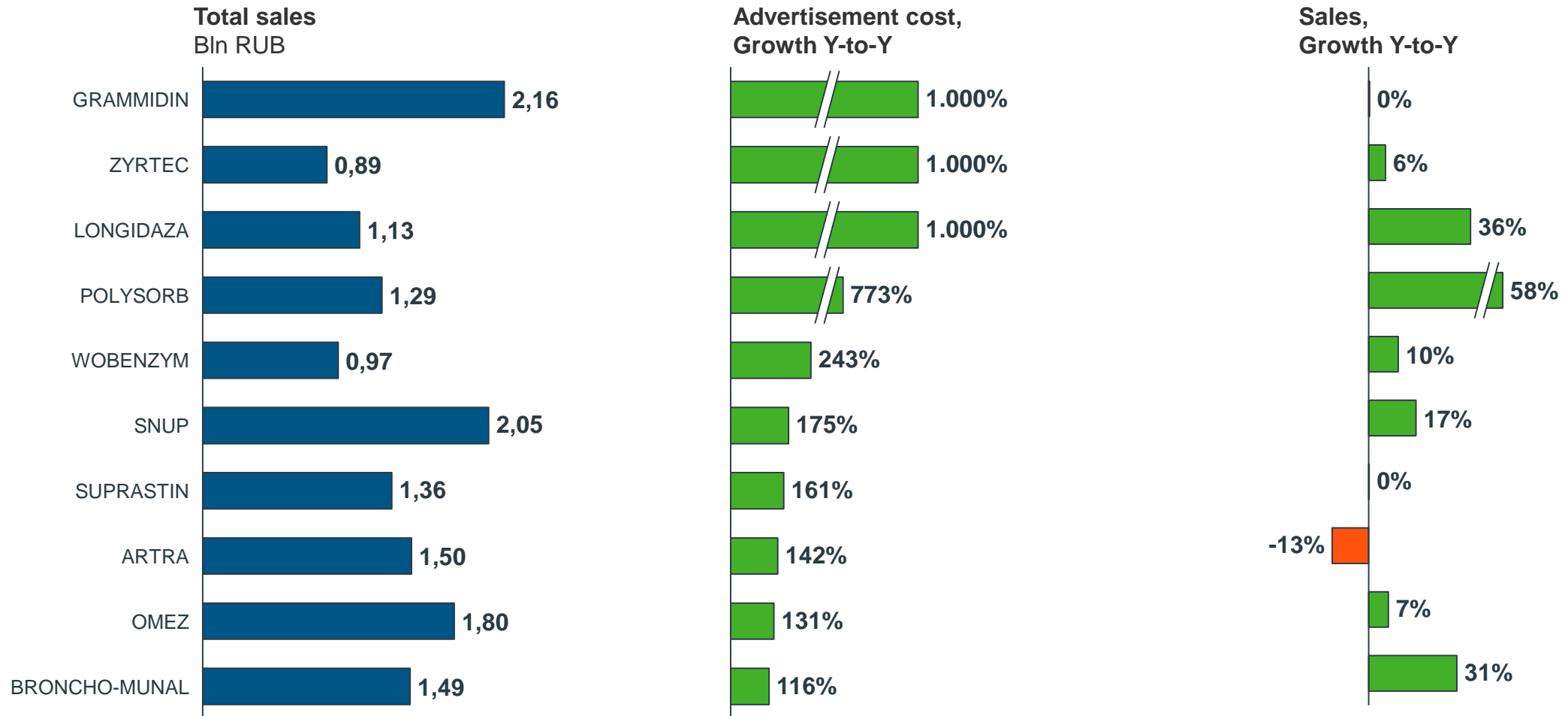


TOP-15 brands on Russian market, January-September 2019



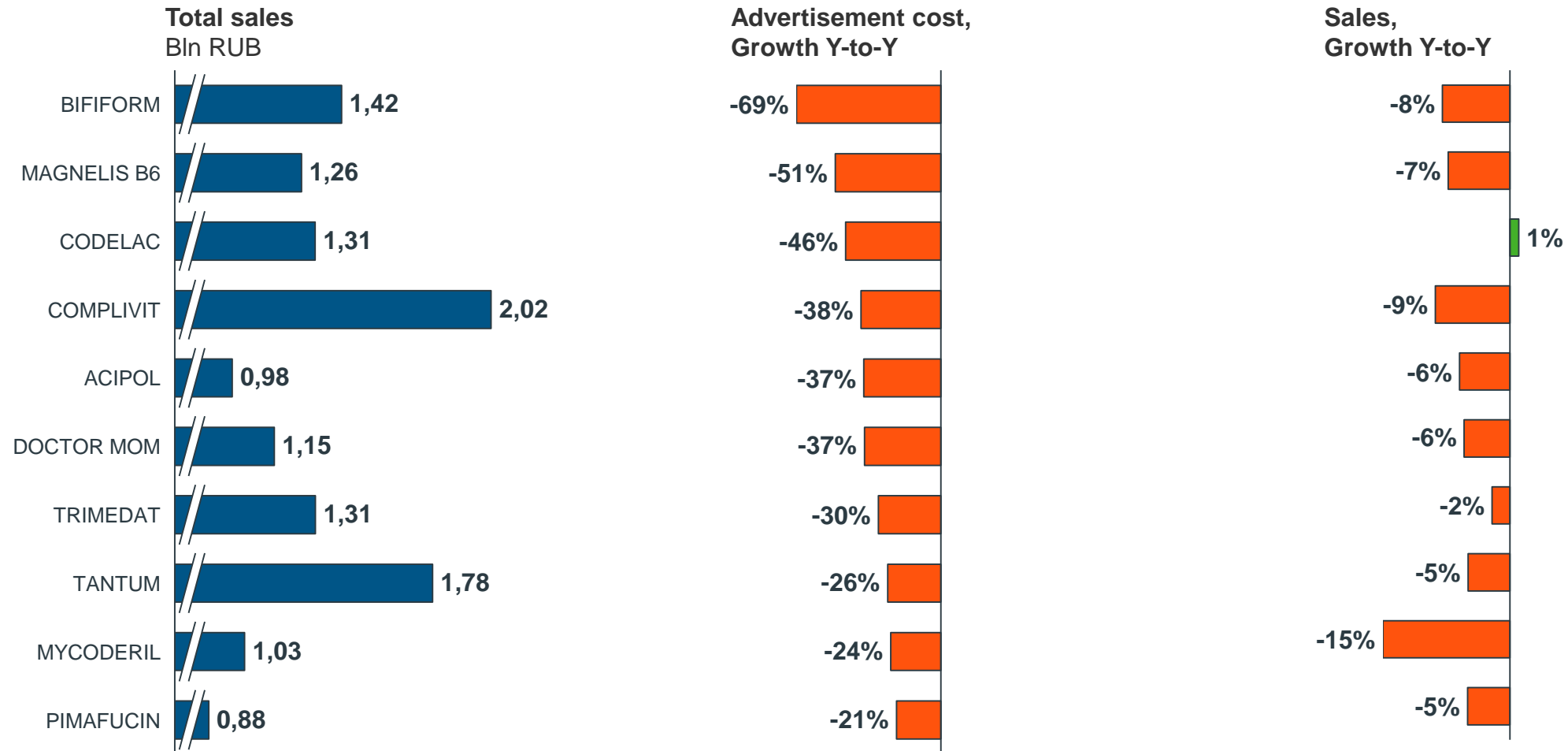
Source: IQVIA databases. Retail, Public, DLO, RLO (excluding food supplements and diagnostic agents), TRD Prices

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



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 2019



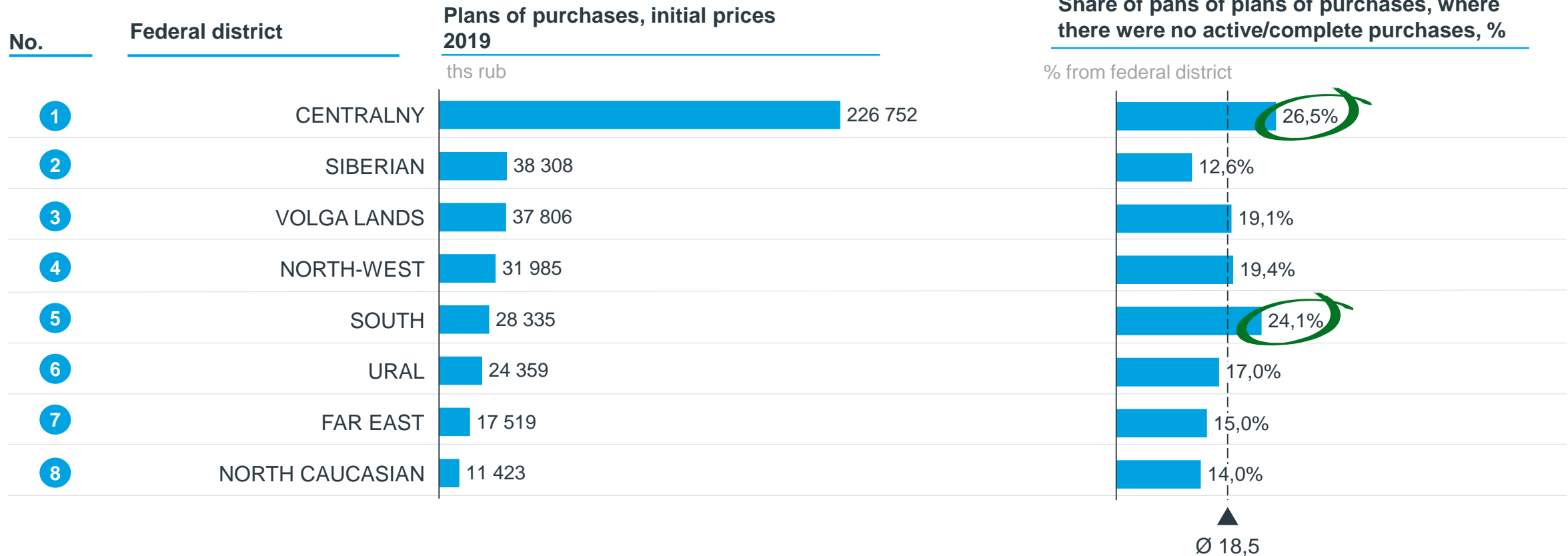
The rank is calculated among TOP-200 Brands by sales with advertising cost greater than 50 mln RUB
 Source: IQVIA databases, Pharamtrend, Mediascope data, FIN Prices

Special focus – tender market



Central and South FD have the highest share of non-published purchases

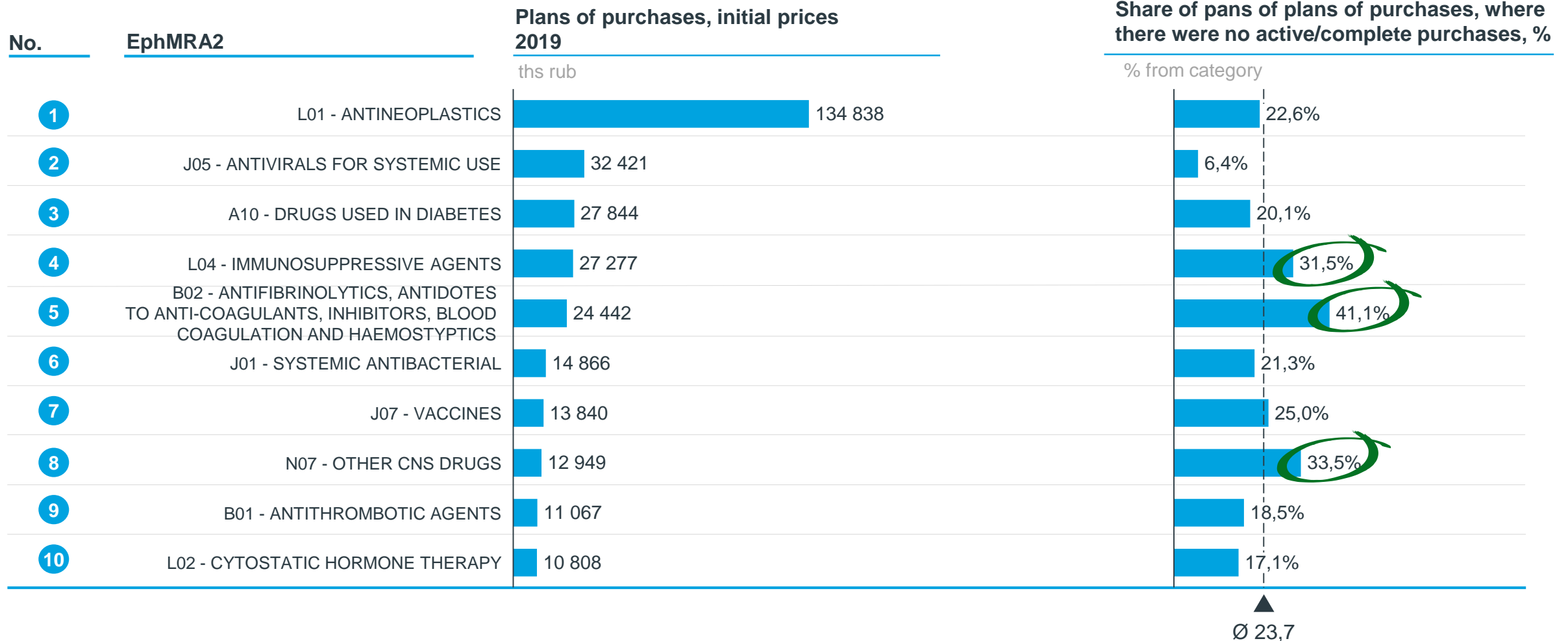
Rating of Federal Districts in plans of purchases in 2019



Immunosuppressive, antifibrinolytics and CNS drugs have highest share of non-published purchases in 2019



TOP-10 EphMRA 2 groups by value in plans of purchases in 2019

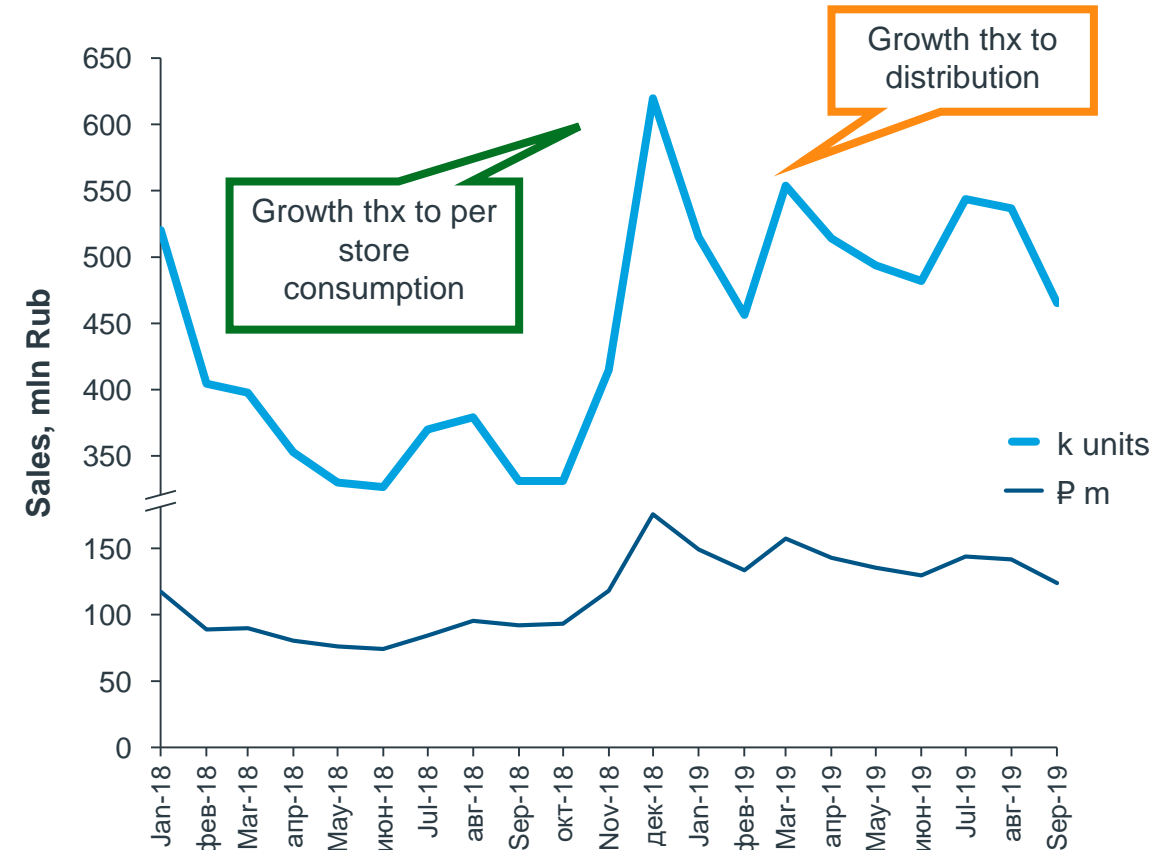
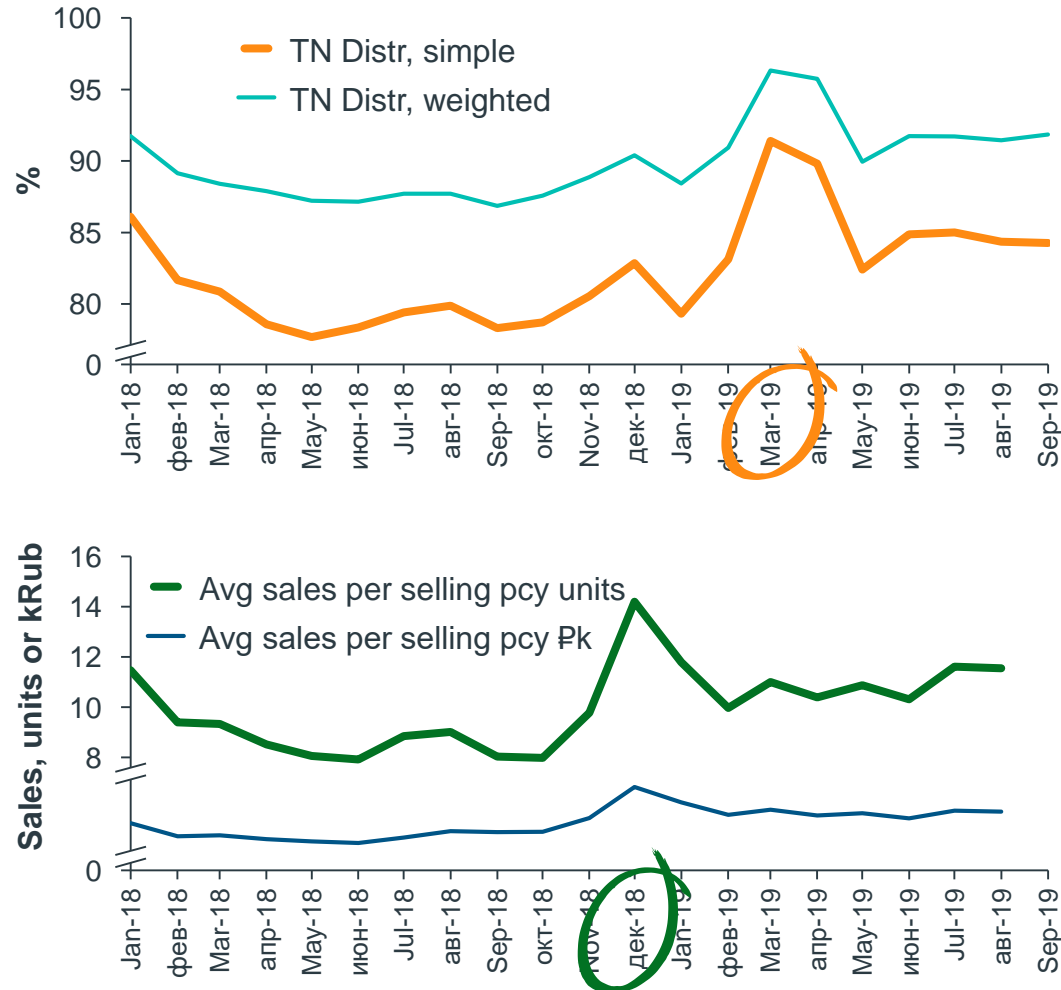


Special focus – new PharmaTrend measurements

IQVIA PharmaTrend in Russia now also features average packs sold per trade name and selling pharmacy to detect sales drivers



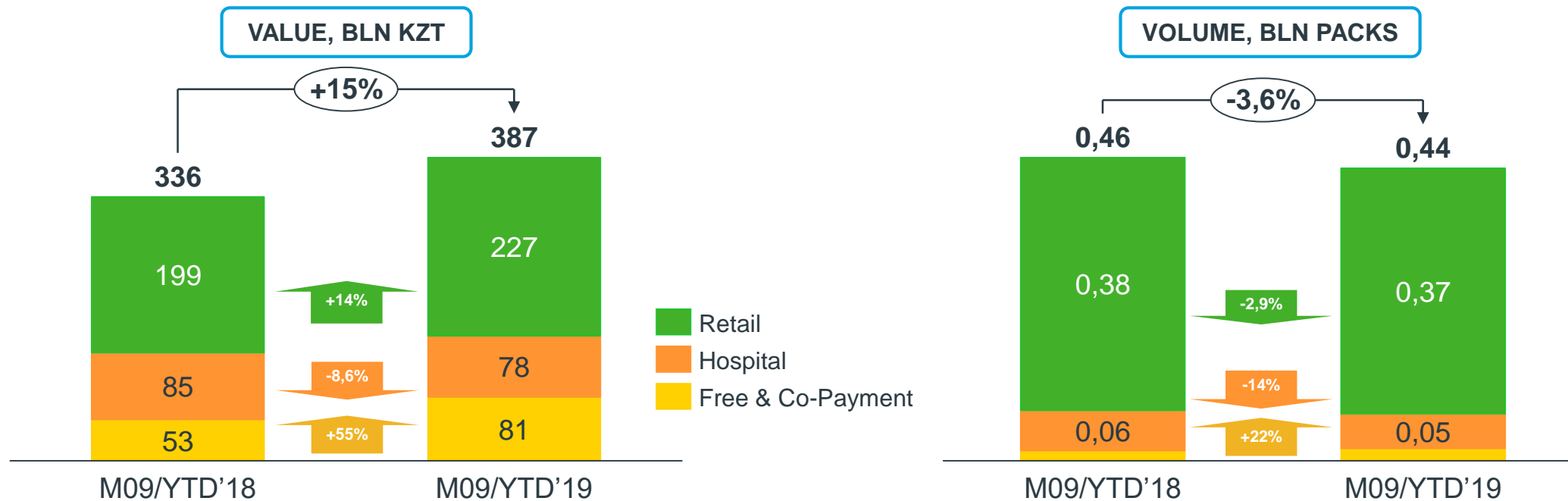
In this real example (Polisorb), December sales were mainly driven by more packs sold per store (promotion), while in March, the extended distribution (# of stores) was the main sales driver





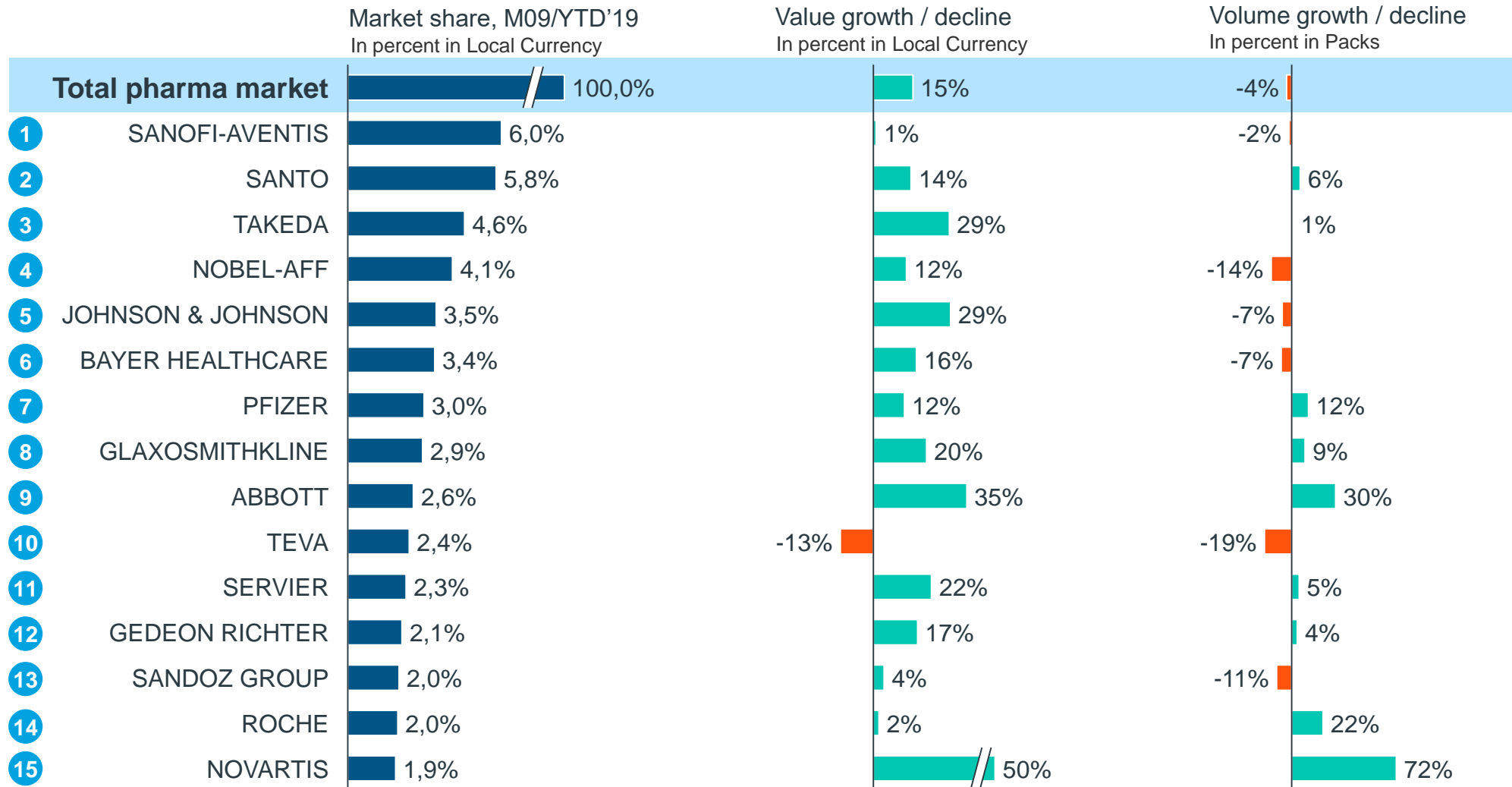
Kazakhstan pharma market growth in January-September 2019

Market grew by 15% in value and decreased by 3,6% in volume



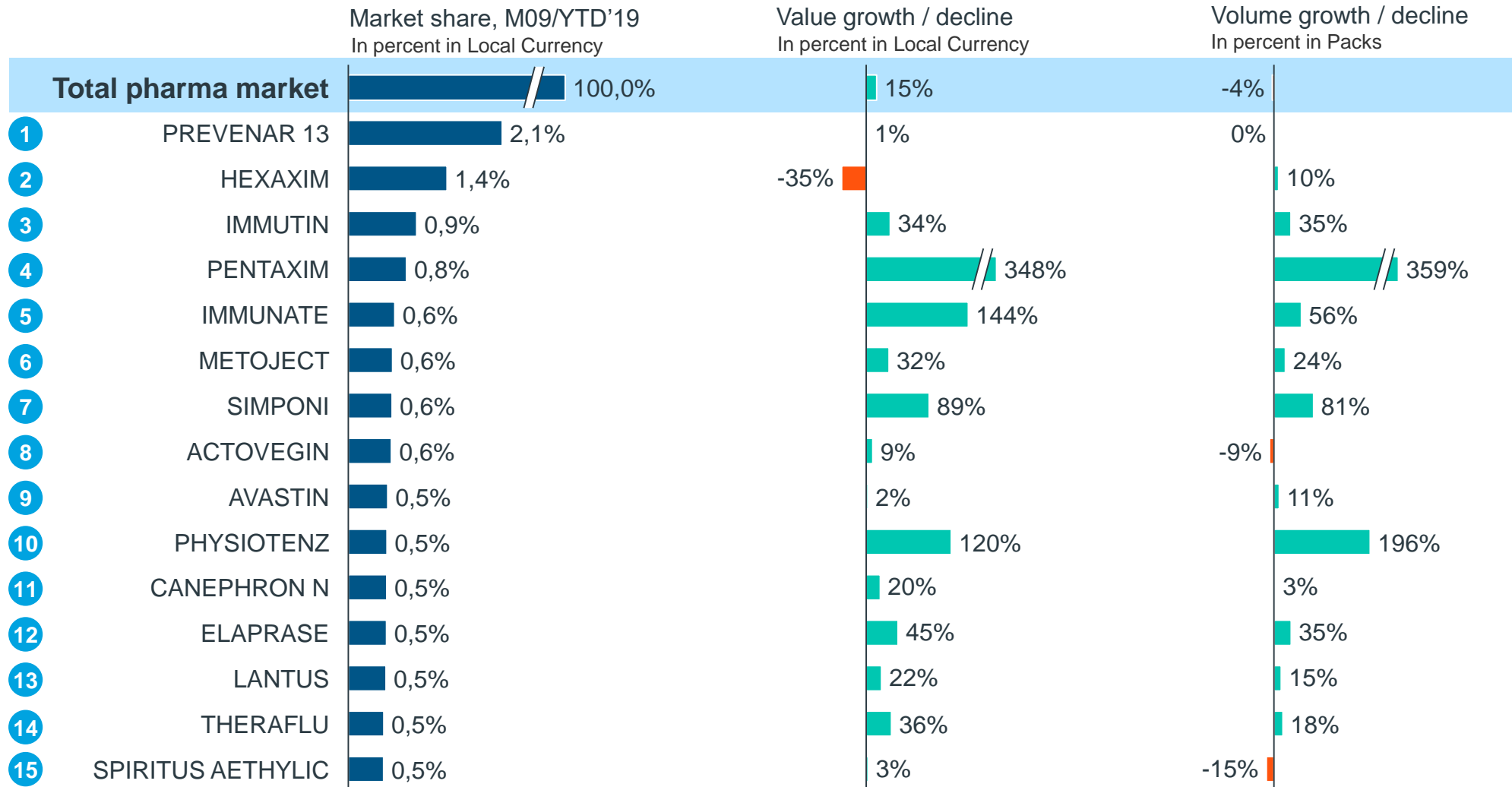
Indicator	KZT	USD	EUR	PACKS
Value M09/YTD'19, Bln.	387	1,01	0,90	0,44
Growth M09/YTD'19%	▲ 15%	▲ 1,3%	▲ 7,8%	▼ -3,6%

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





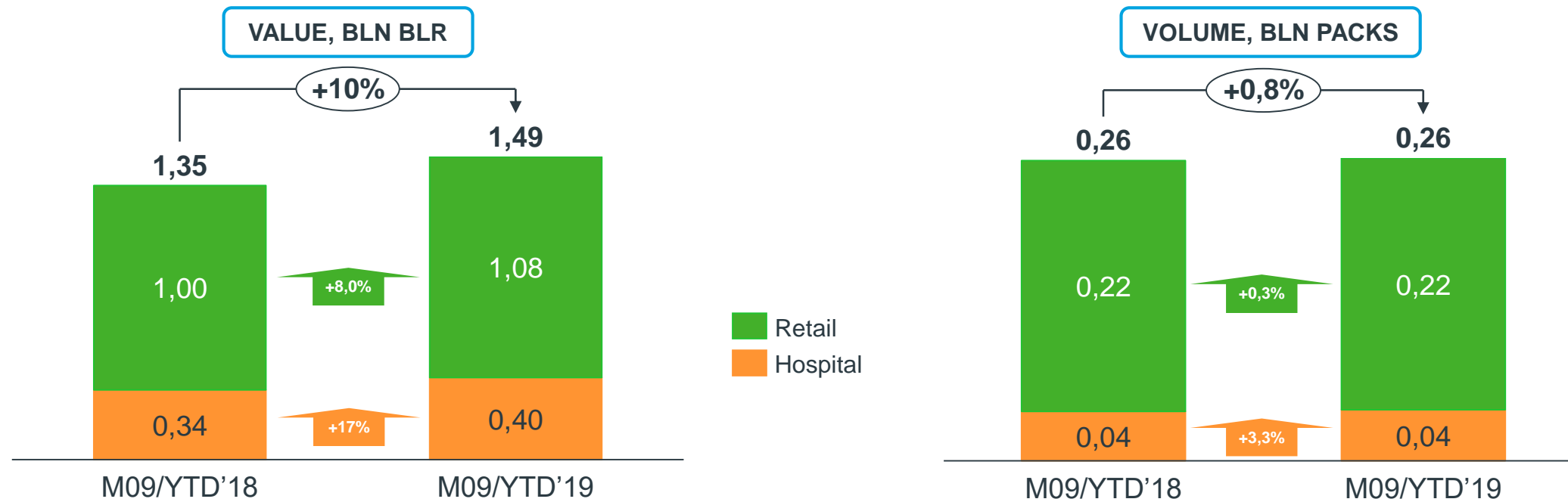
TOP-15 brands on Kazakhstan market, January-September 2019





Belarus pharma market growth in January-September 2019

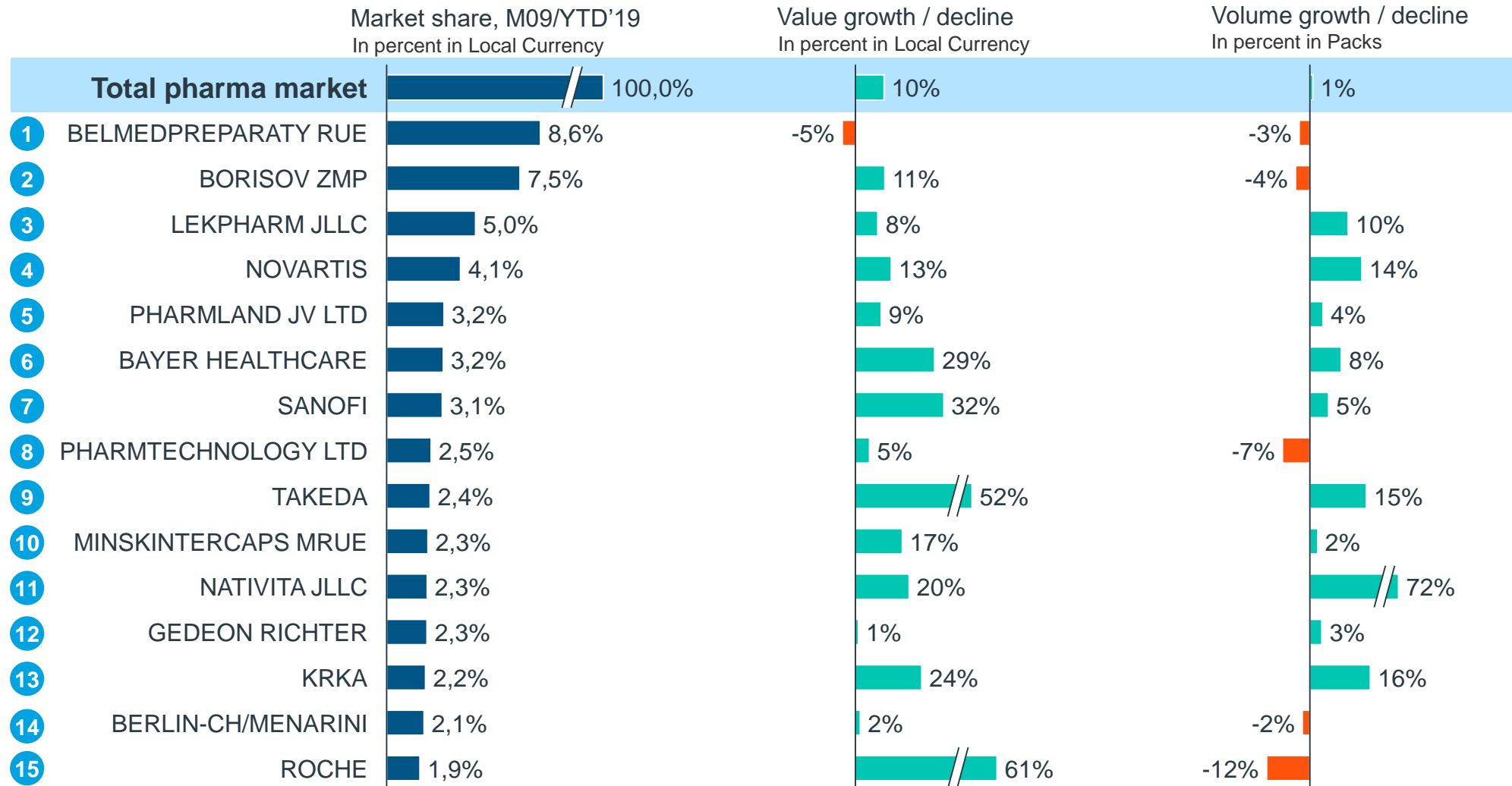
Market grew by 10% in value and by 0,8% in volume



Indicator	BLR	USD	EUR	PACKS
Value M09/YTD'19, Bln.	1,49	0,71	0,63	0,26
Growth M09/YTD'19%	▲ 10%	▲ 5,6%	▲ 12%	▲ 0,8%

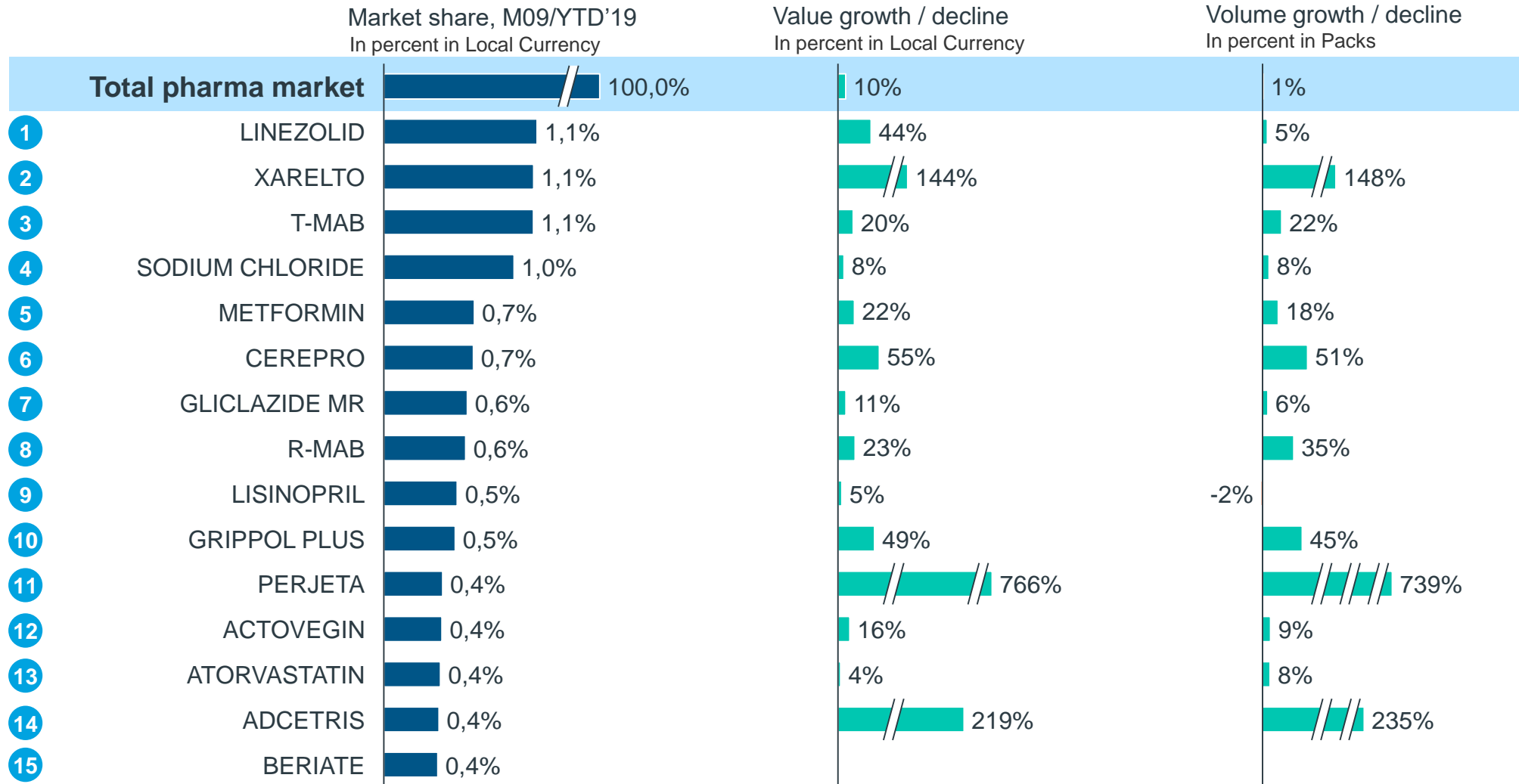


TOP-15 corporations on Belarus market, January-September 2019





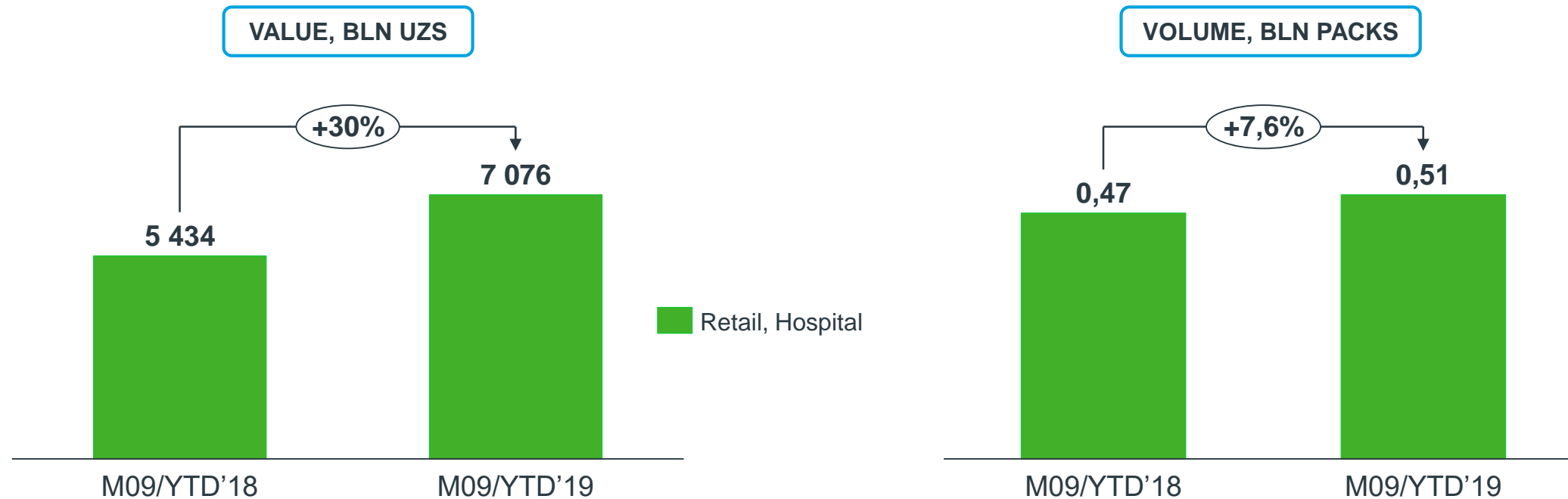
TOP-15 brands on Belarus market, January-September 2019





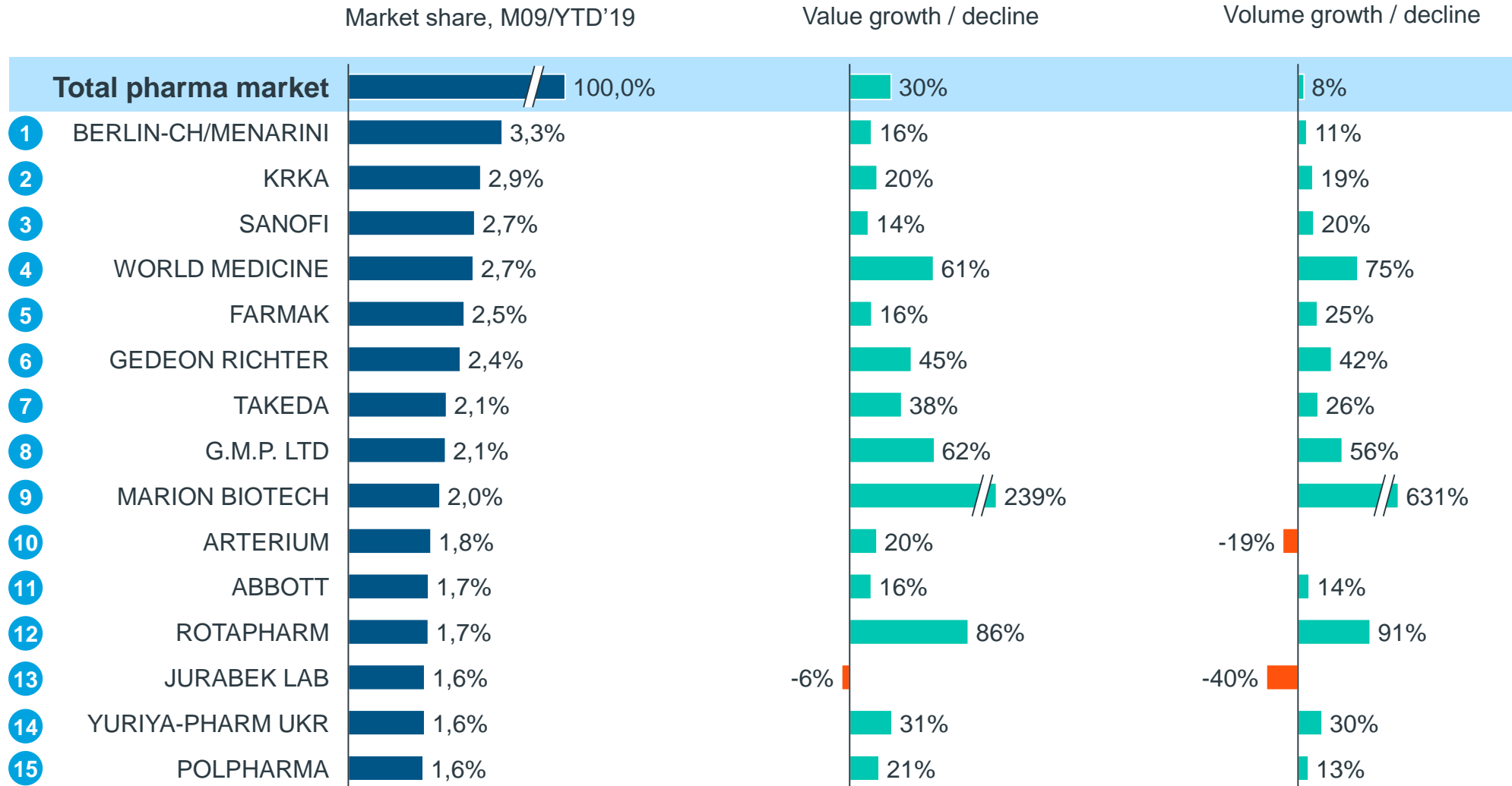
Uzbekistan pharma market growth in January-September 2019

Market grew by 30% in value and by 7,6% in volume



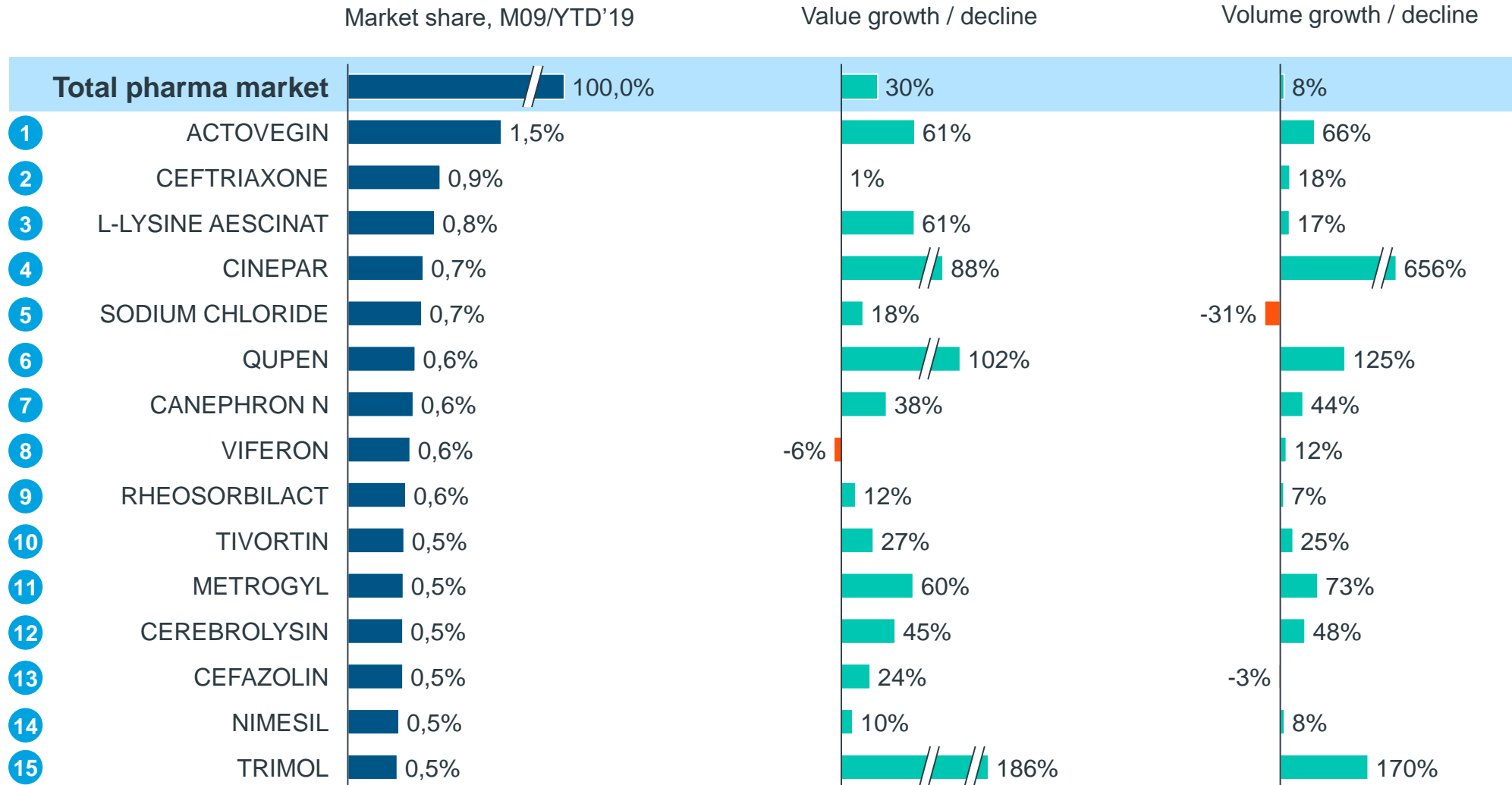
Indicator	UZS	USD	EUR	PACKS
Value M09/YTD'19, Bln.	7 076	0,83	0,74	0,51
Growth M09/YTD'19%	▲ 30%	▲ 22%	▲ 29%	▲ 7,6%

TOP-15 corporations on Uzbekistan market, January-September 2019





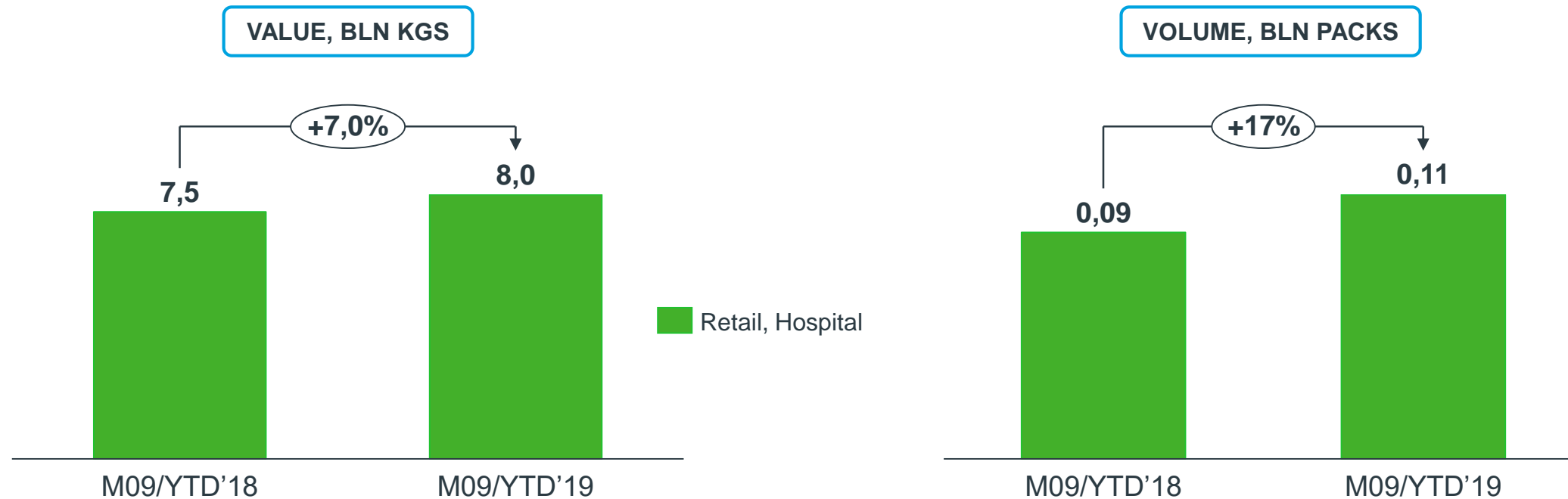
TOP-15 brands on Uzbekistan market, January-September 2019





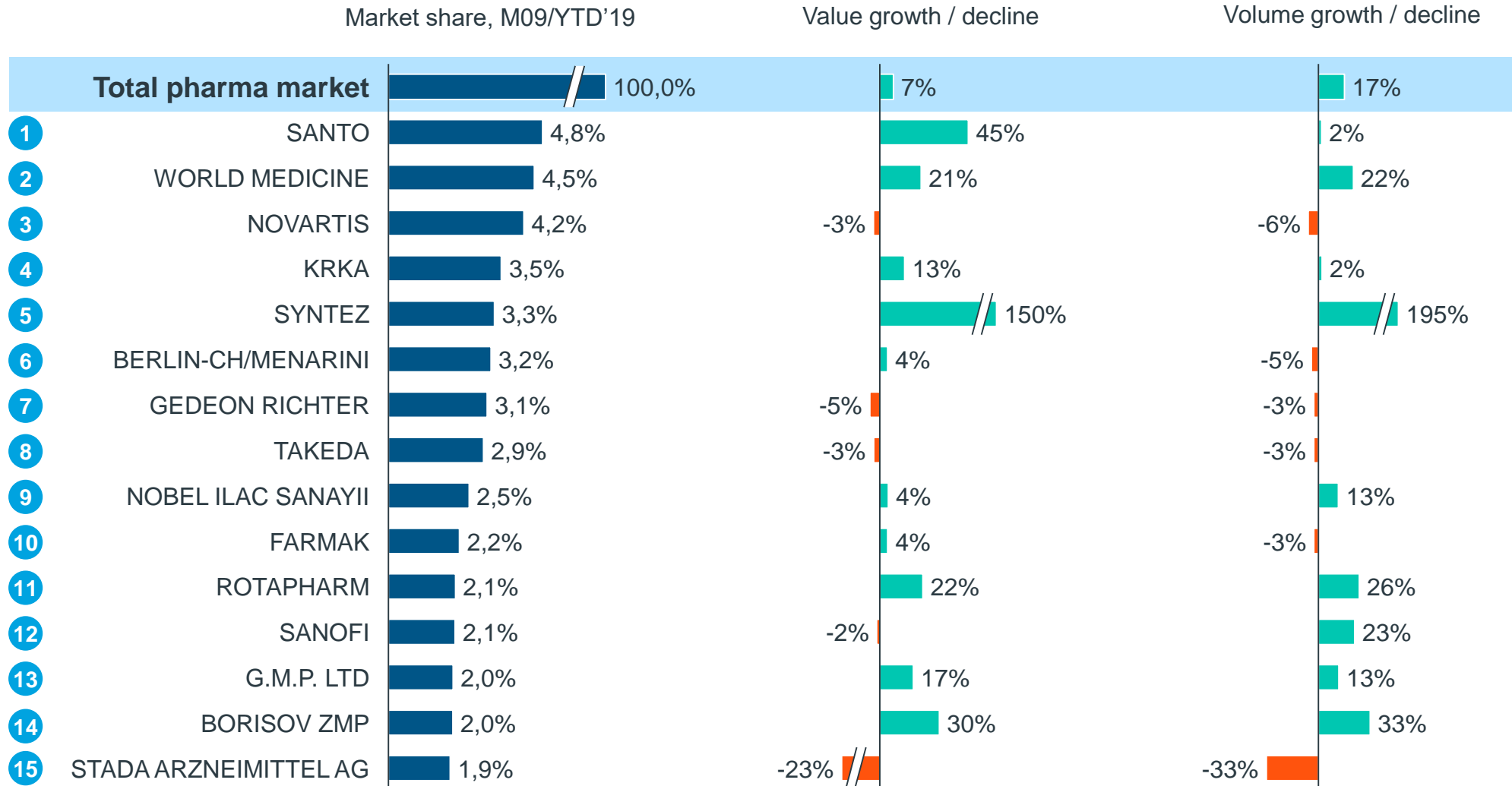
Kyrgyzstan pharma market growth in January-September 2019

Market grew by 7,0% in value and by 17% in volume



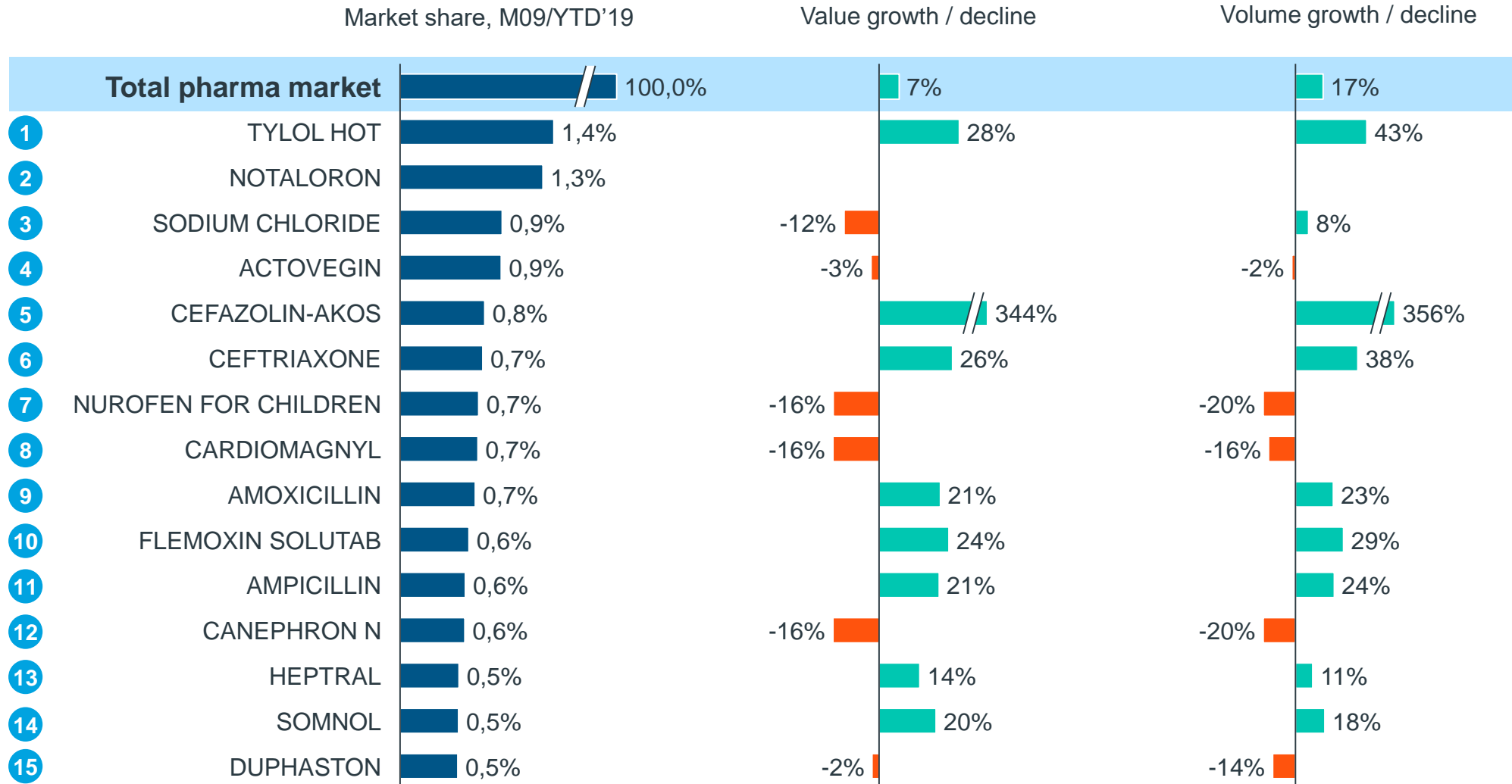
Indicator	KGS	USD	EUR	PACKS
Value M09/YTD'19, Bln.	8,0	0,11	0,10	0,11
Growth M09/YTD'19%	▲ 7,0%	▲ 5,2%	▲ 12%	▲ 17%

TOP-15 corporations on Kyrgyzstan market, January-September 2019





TOP-15 brands on Kyrgyzstan market, January-September 2019



Please Contact Us for More Information



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