



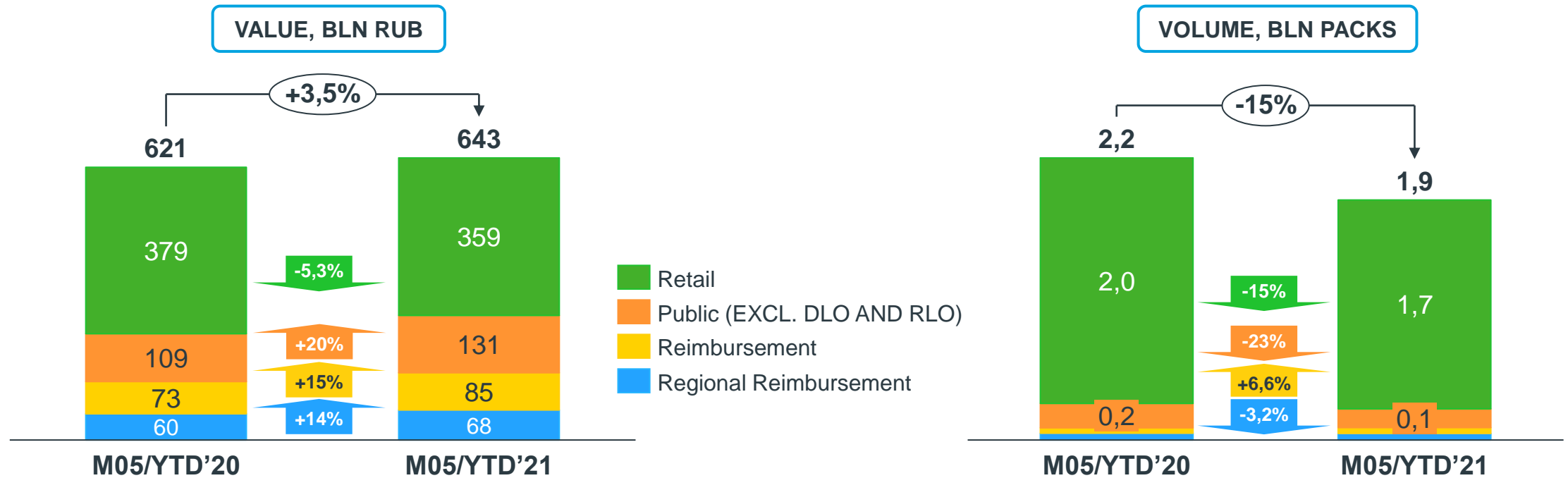
# Facts from IQVIA

M05 2021



# Russian pharma market growth in January-May 2021

Market grew by 3,5% in value and decreased by 15% in volume

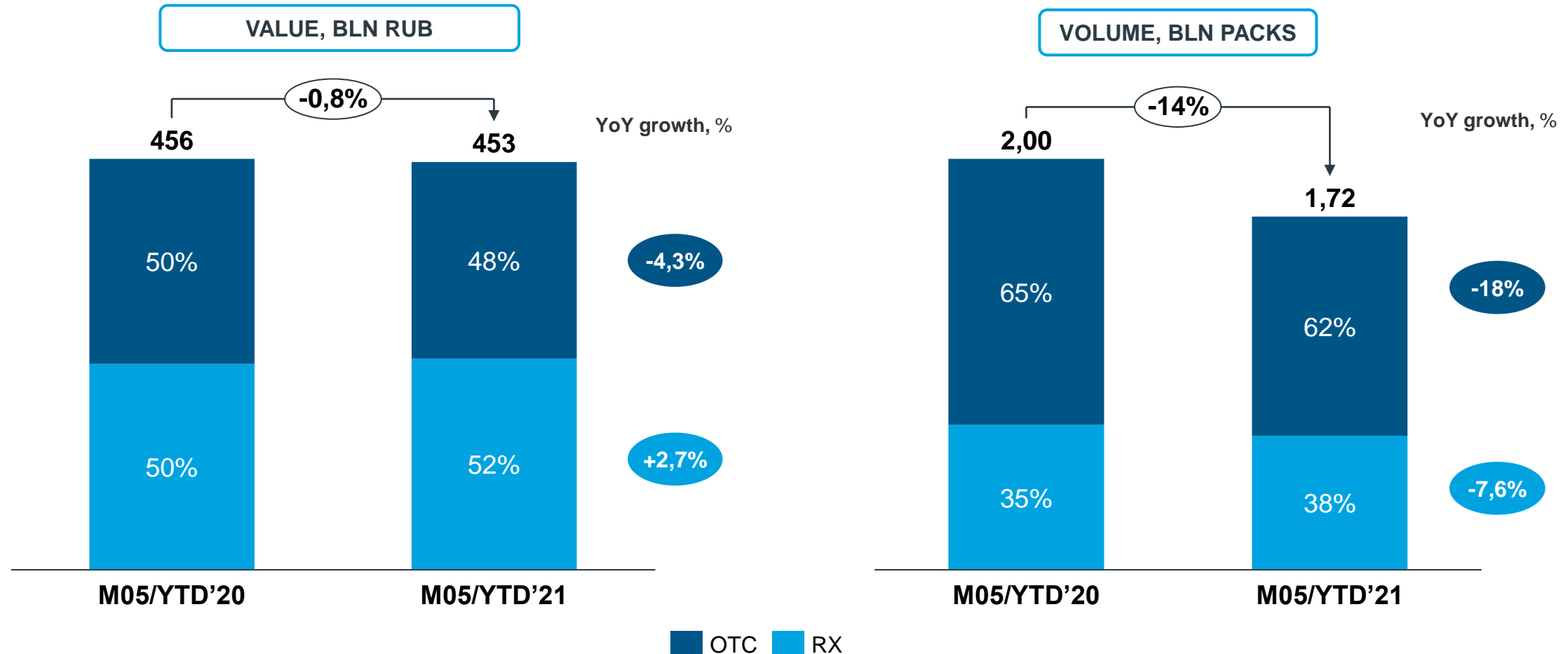


Indicator	RUB	USD	EUR	PACKS
Value M05/YTD'21, Bln.	643	8,6	7,2	1,9
Growth M05/YTD'21, %	▲ 3,5%	▼ -3,8%	▼ -12%	▼ -15%



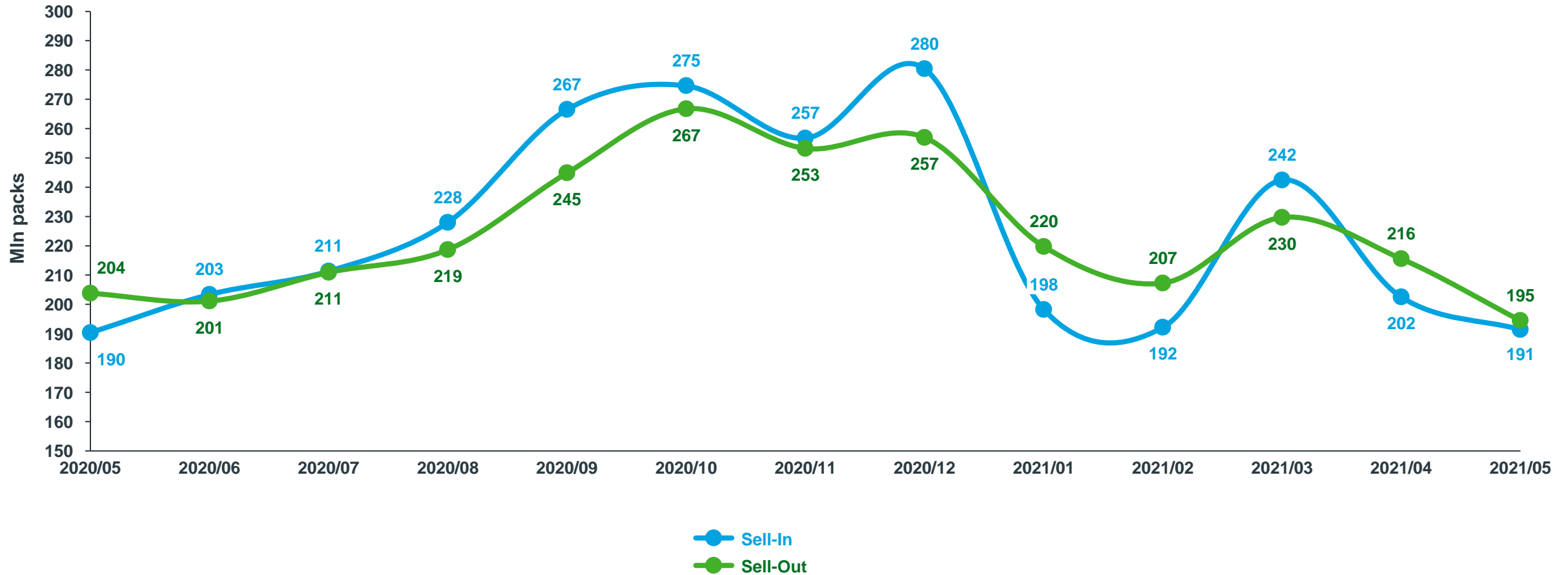
# Russian pharma market decrease in January-May 2021

Retail Sell-Out: Market dropped by 0,8% in value and by 14% in volume



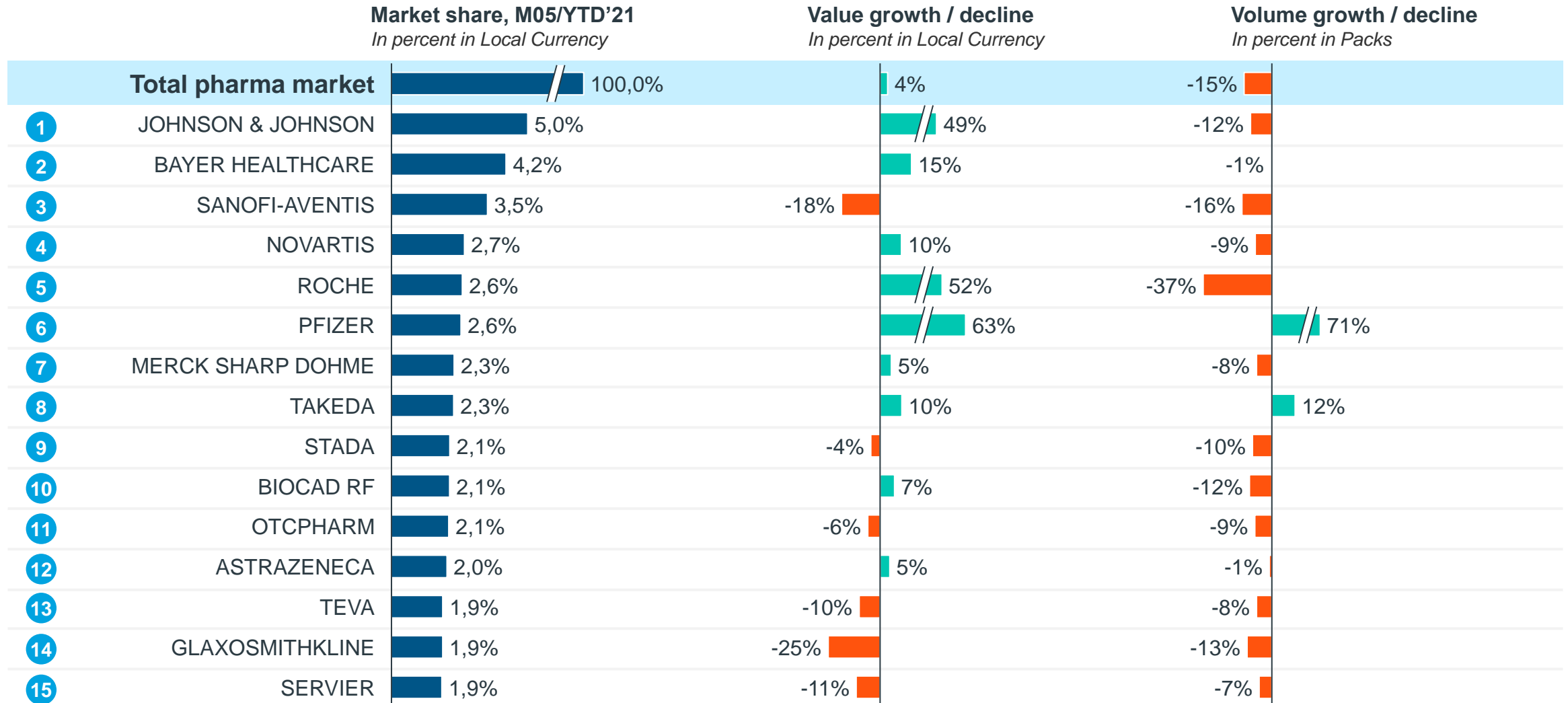


# Sell-In vs Sell-Out, OTC registered drugs



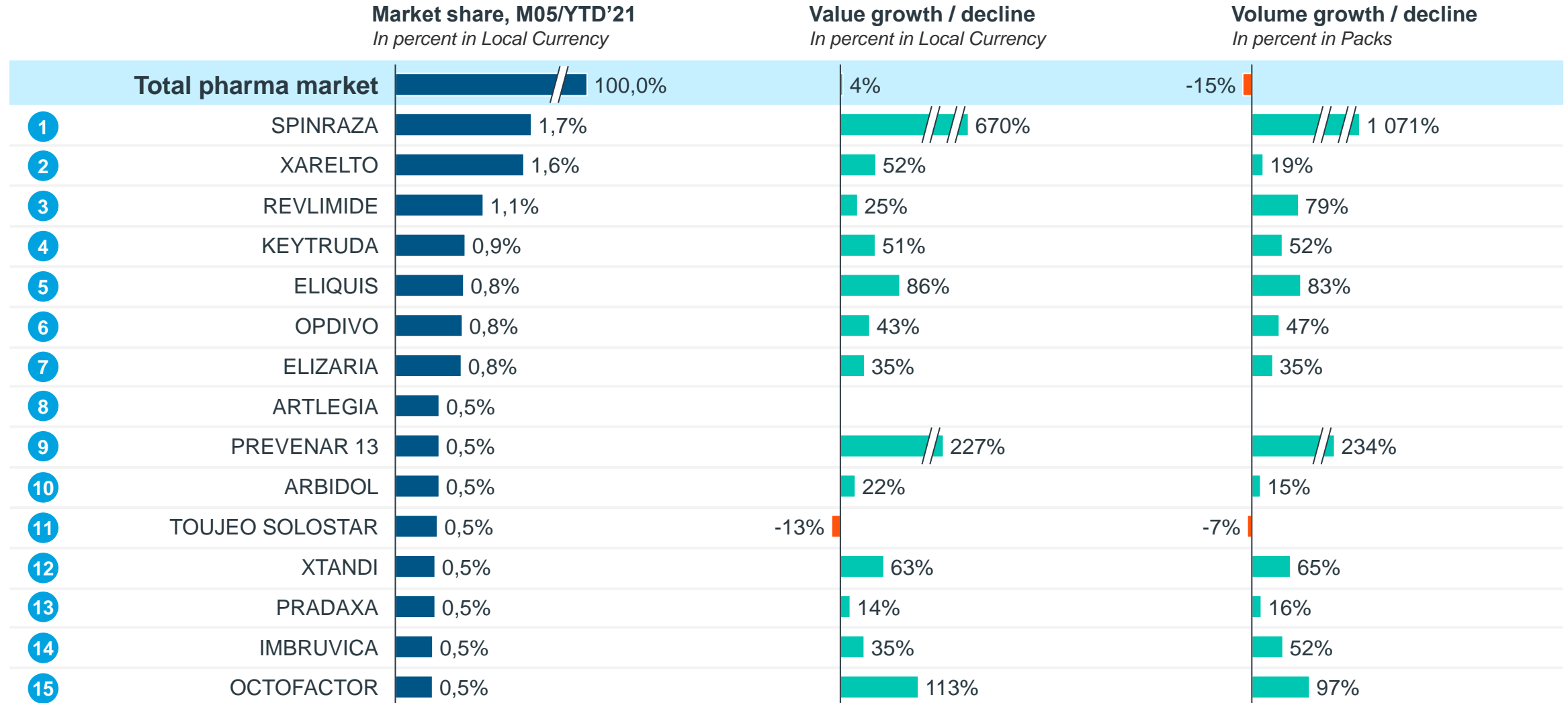


# TOP-15 corporations on Russian market, January-May 2021



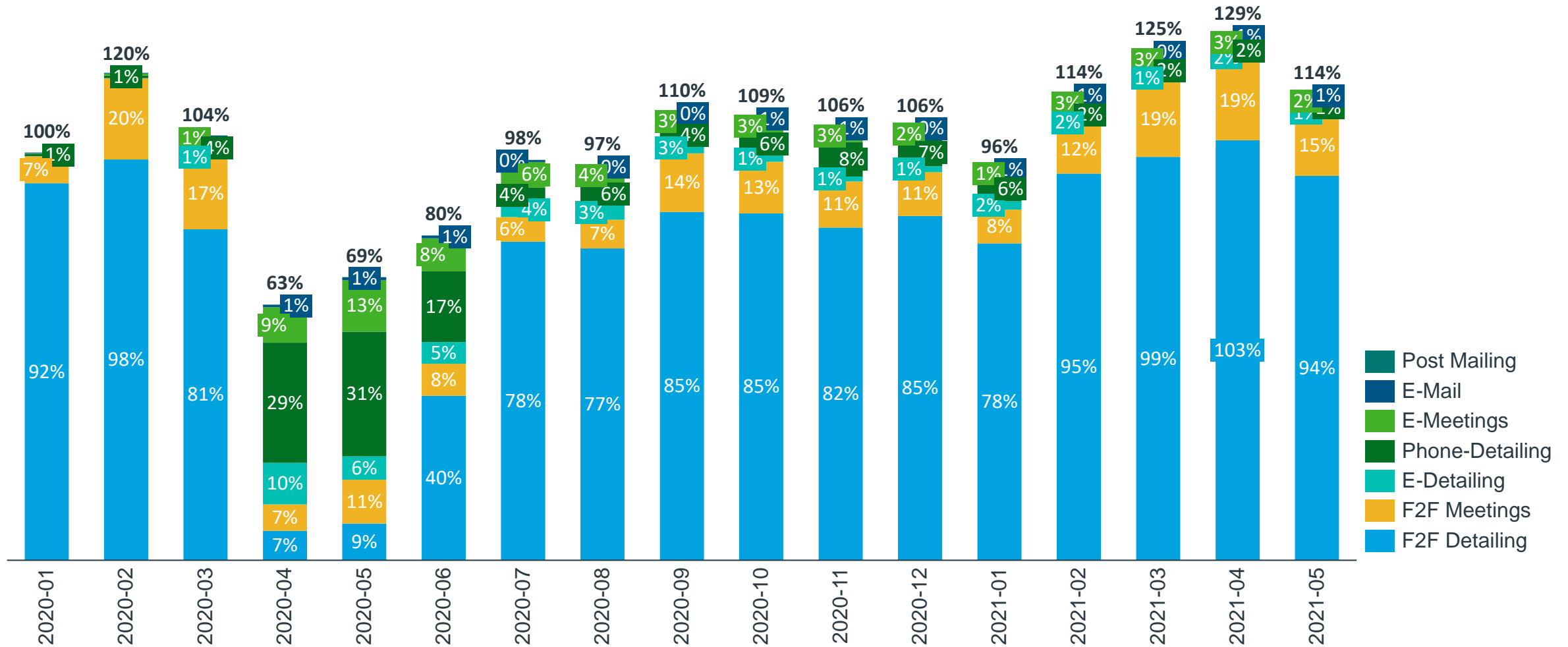


# TOP-15 brands on Russian market, January-May 2021

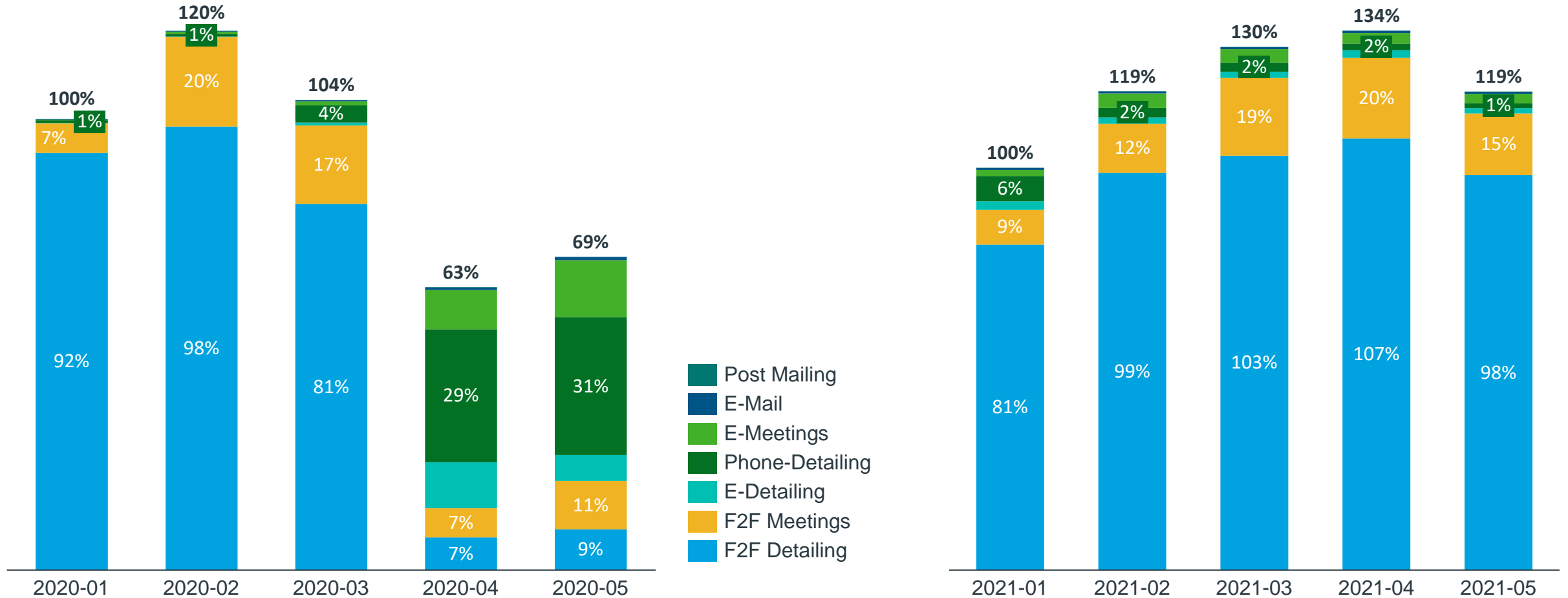


Source: IQVIA databases. Retail, Public, DLO, RLO (excluding food supplements and diagnostic agents), TRD Prices

# Index of promotional interactions by channel in Russia, January 2020 - May 2021



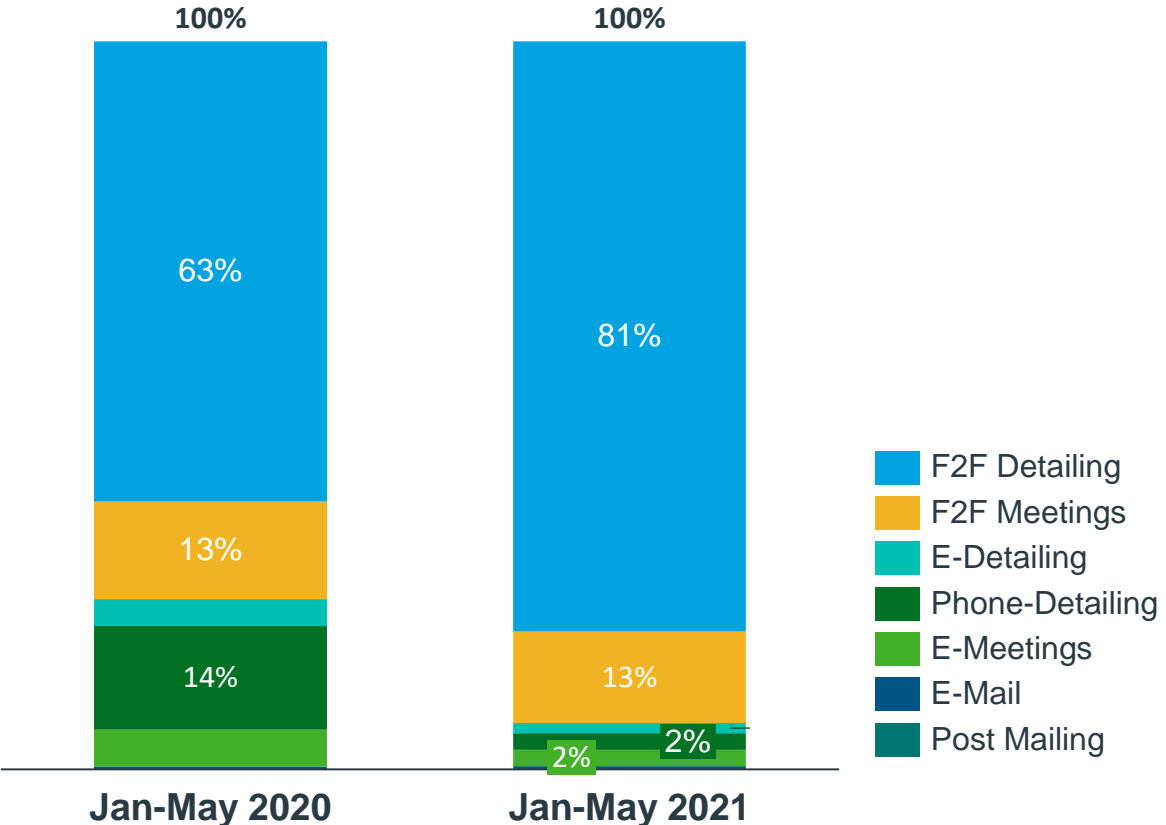
# Index of promotional interactions by channel in Russia, January-May 2020 & 2021



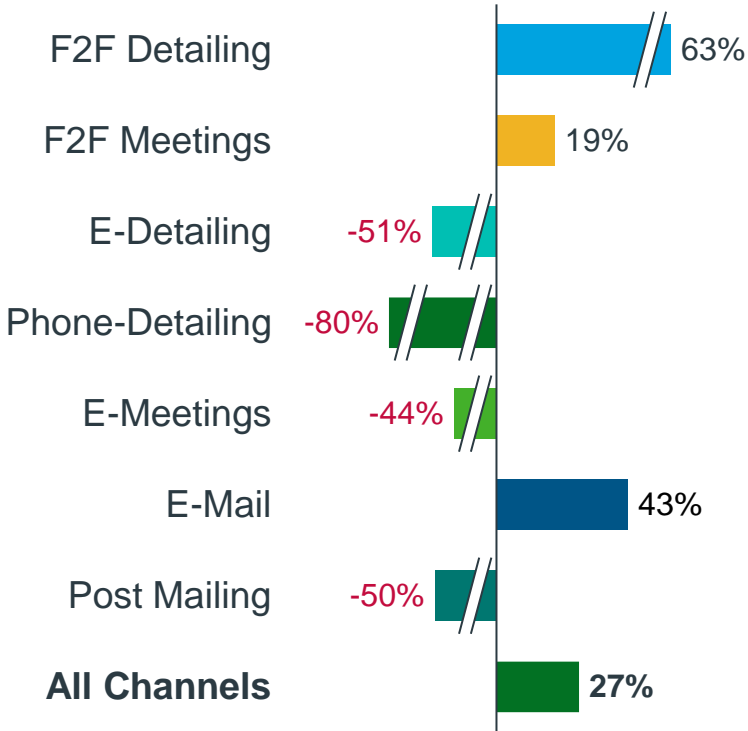


# Total Market overall promotional volume increased by 27%, Jan-May 2021 vs 2020

Promotional volume share by channel

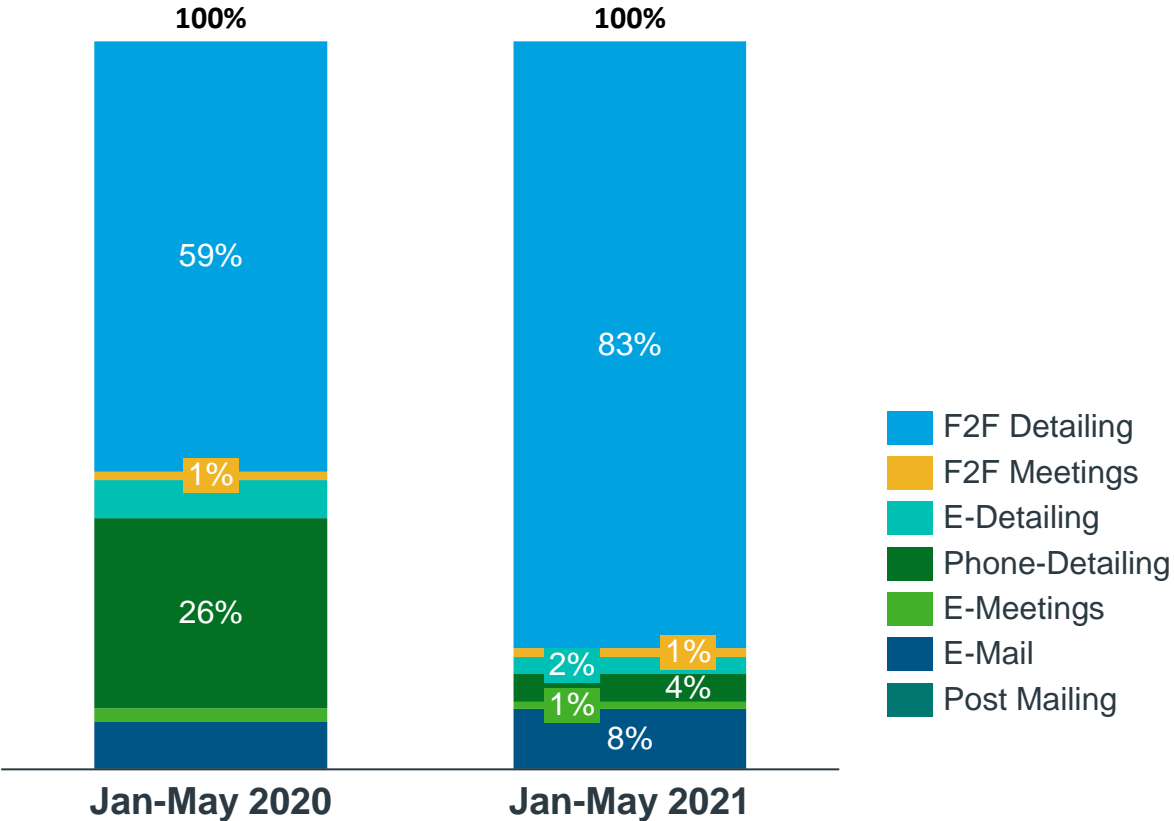


% Changes in promotional volume by channel  
Jan-May 2021 vs 2020

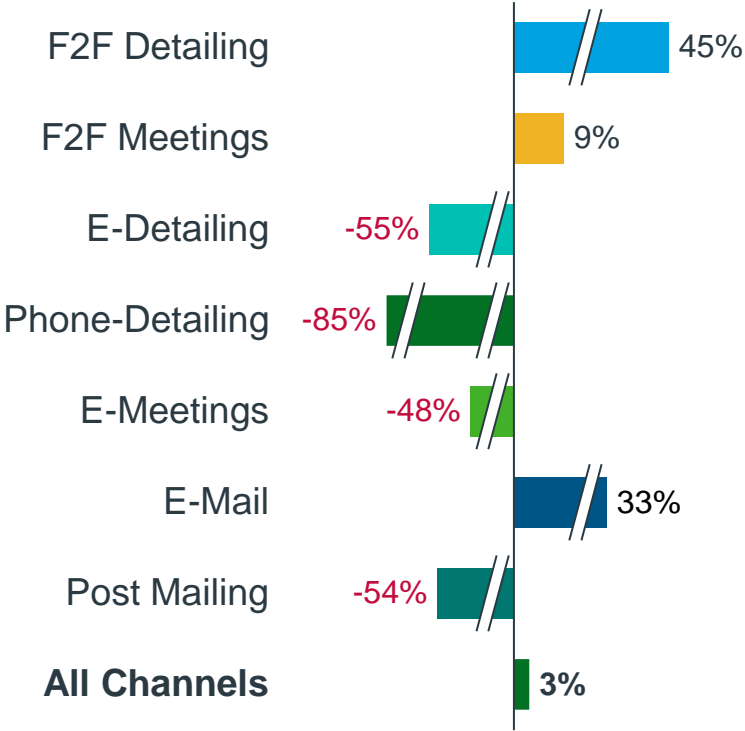


# Total Market overall promotional volume (contacts) increased by 3%, Jan-May 2021 vs 2020

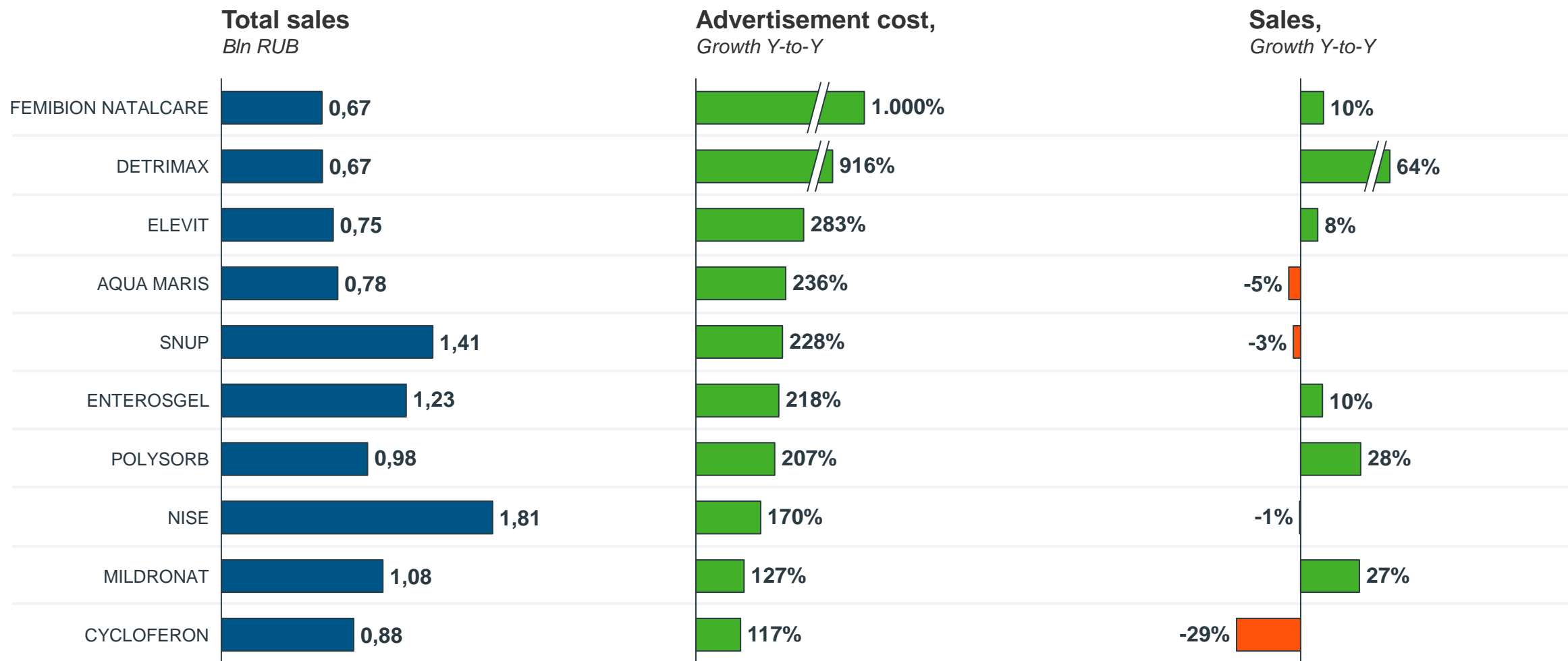
Promotional volume (contacts) share by channel



% Changes in promotional volume (contacts) by channel Jan-May 2021 vs 2020

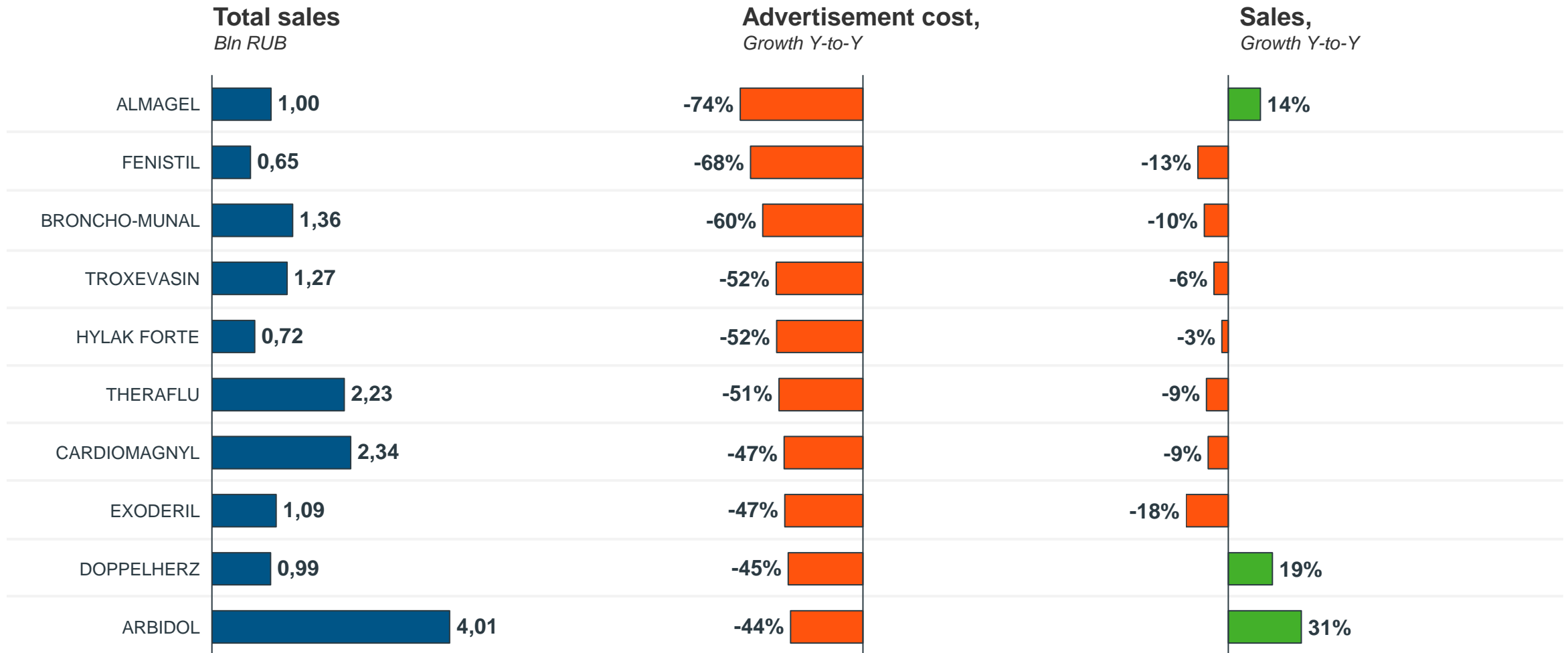


# TOP-10 products by growth in advertisement investments in January-May 2021



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-May 2021

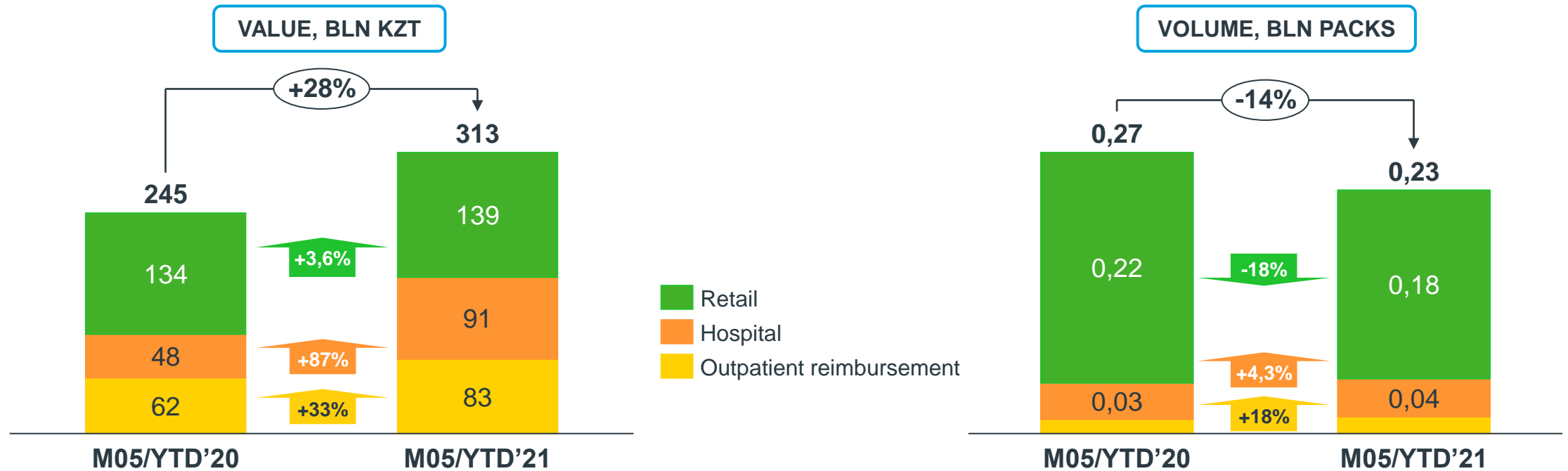


The rank is calculated among TOP-200 Brands by sales with advertising cost greater than 50 mln RUB  
 Source: IQVIA databases, Pharmatrend, Mediascope data, FIN Prices



# Kazakhstan pharma market growth in January-May 2021

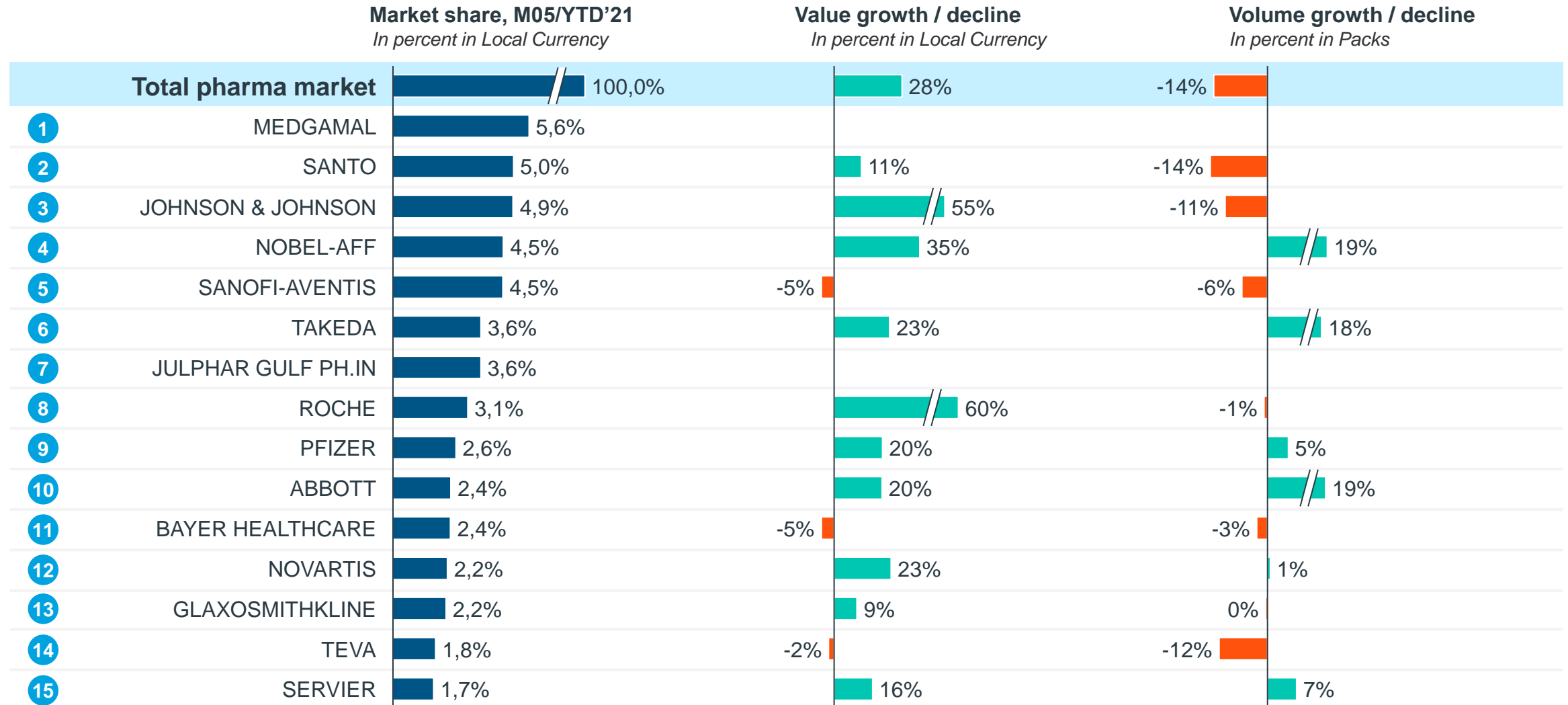
Market grew by 28,0% in value and decreased by 14% in volume



Indicator	KZT	USD	EUR	PACKS
Value M05/YTD'21, Bln.	313	0,74	0,62	0,23
Growth M05/YTD'21, %	▲ 28%	▲ 22%	▲ 12%	▼ -14%



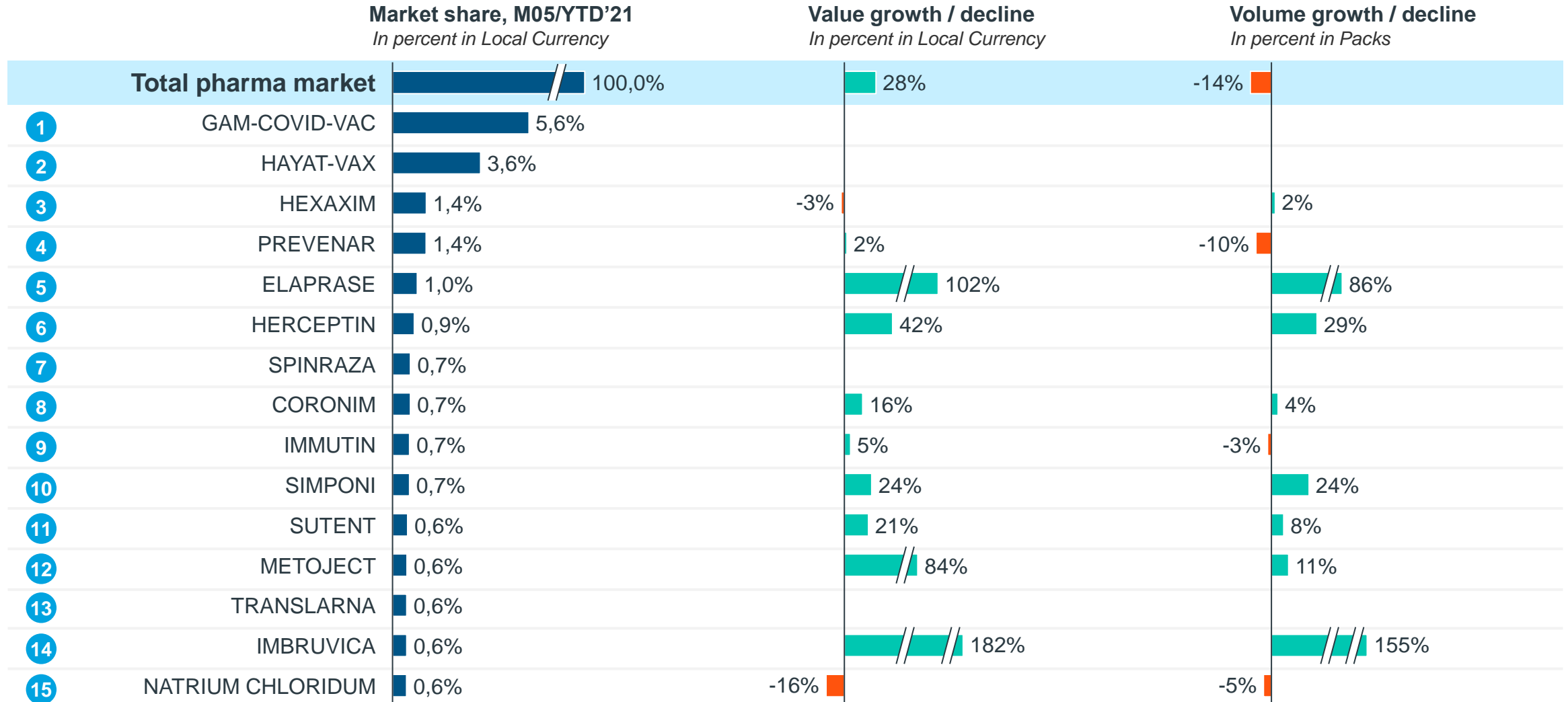
# TOP-15 corporations on Kazakhstan market, January-May 2021



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



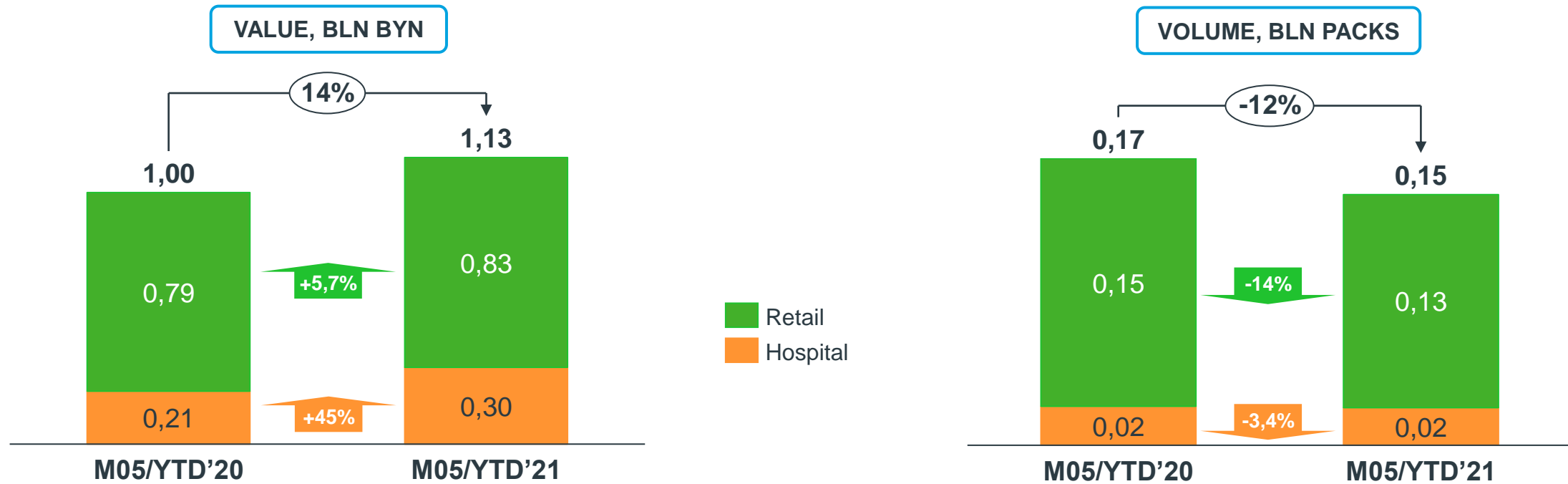
# TOP-15 brands on Kazakhstan market, January-May 2021





# Belarus pharma market growth in January-May 2021

Market grew by 14% in value and decreased by 12% in volume

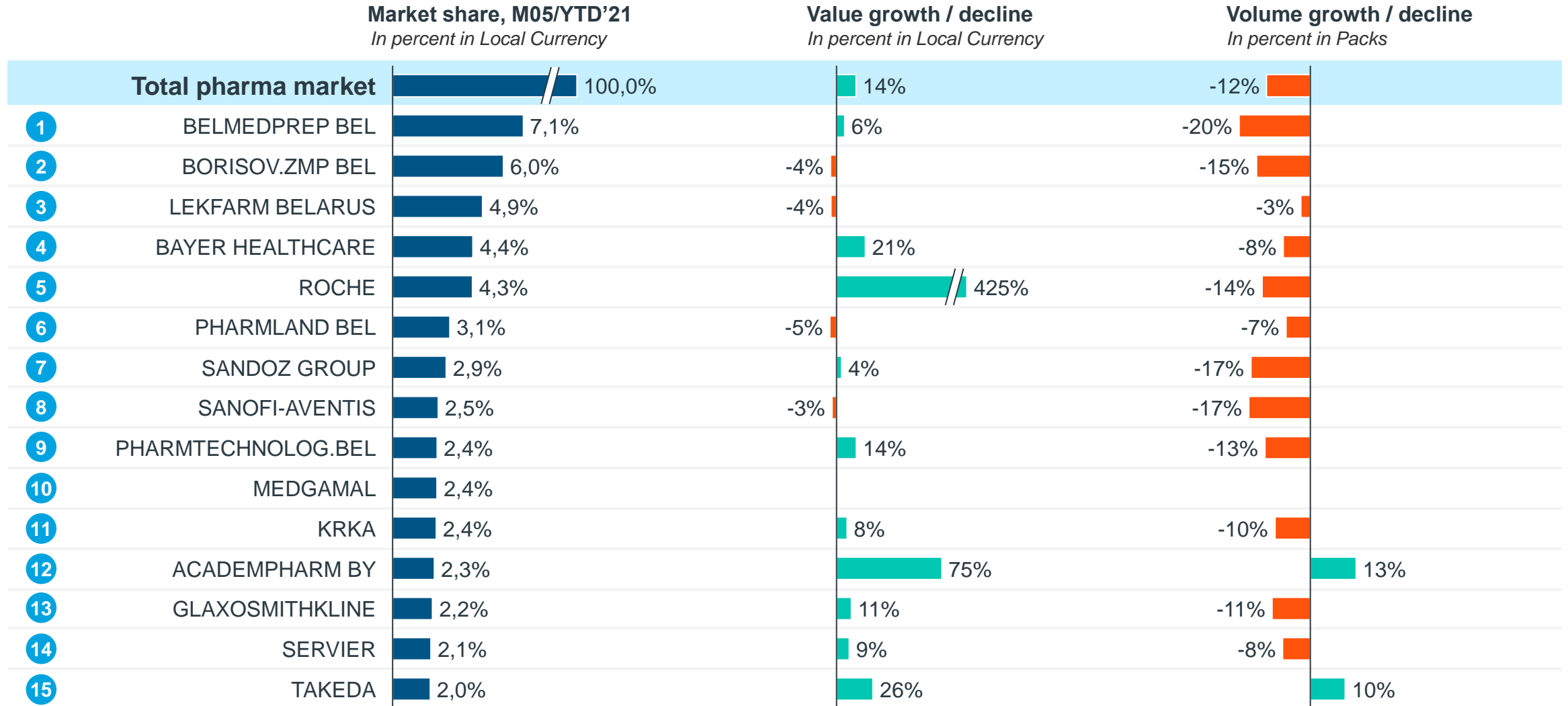


Indicator	BYN	USD	EUR	PACKS
Value M05/YTD'21, Bln.	1,13	0,44	0,36	0,15
Growth M05/YTD'21, %	▲ 14%	▲ 2,8%	▼ -6,5%	▼ -12%





# TOP-15 corporations on Belarus market, January-May 2021



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



# TOP-15 brands on Belarus market, January-May 2021

	Market share, M05/YTD'21 <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>
<b>Total pharma market</b>	100,0%	14%	-12%
1 XARELTO	2,4%	42%	13%
2 GAM-COVID-VAC	2,4%		
3 ACTEMRA	1,5%	1 111%	371%
4 PERJETA	1,3%	69 815%	83 000%
5 VAC.BBIBP CORV	1,2%		
6 RIVAXAN	0,9%		
7 NATRIUM CHLORIDUM	0,8%	25%	9%
8 KADCYLA	0,8%	13 985%	10 014%
9 HEPARIN-BELMED	0,7%	600%	294%
10 FRAGMIN	0,6%	196%	136%
11 AMLESSA	0,6%	21%	3%
12 ACC	0,5%	55%	22%
13 ENOXAPARIN S.K.	0,5%		
14 MILDRONAT	0,4%	83%	45%
15 DELTYBA	0,4%		



# Uzbekistan pharma market growth in January-May 2021

Market grew by 98% in value and by 49% in volume



Indicator	UZS	USD	EUR	PACKS
Value M05/YTD'21, Bln.	7 032	0,67	0,56	0,38
Growth M05/YTD'21, %	▲ 98%	▲ 82%	▲ 67%	▲ 49%

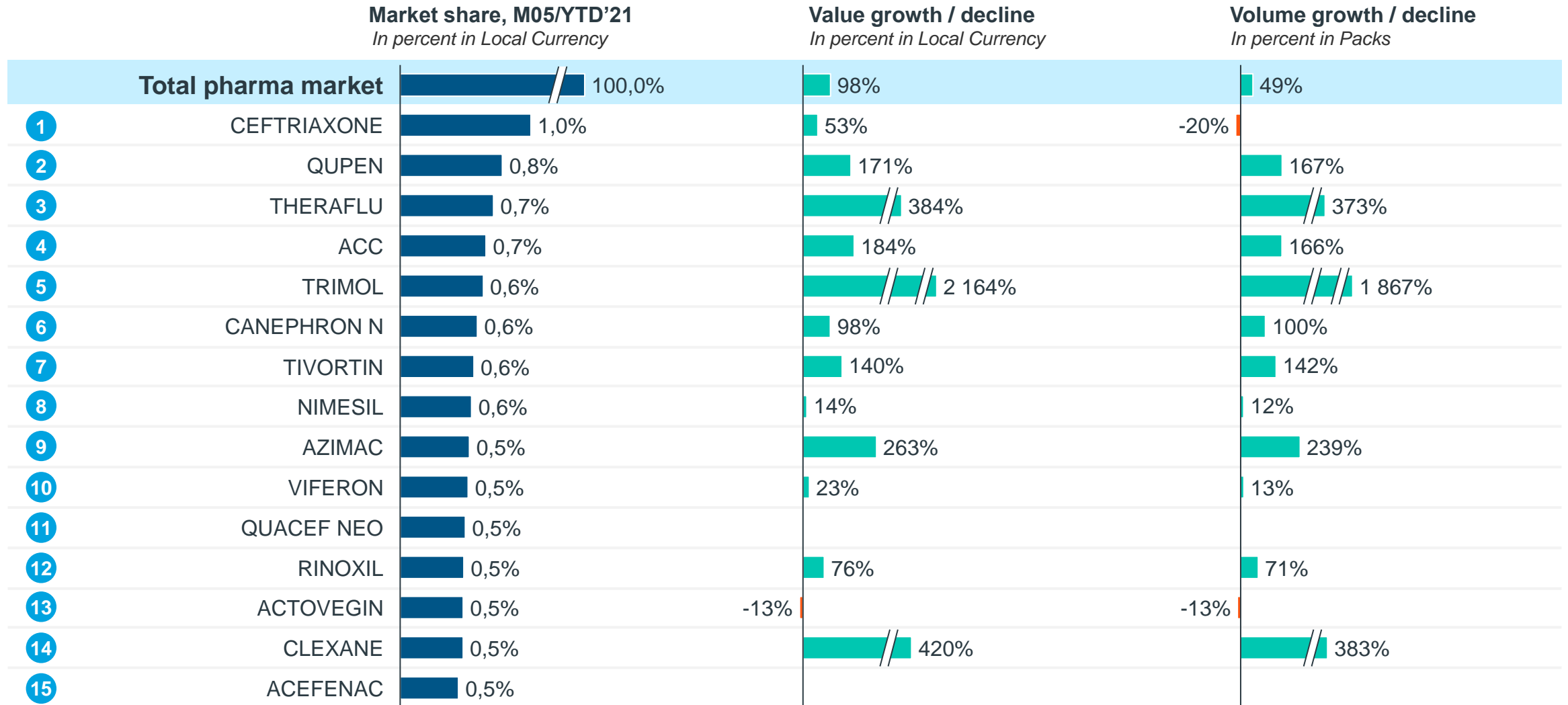


# TOP-15 corporations on Uzbekistan market, January-May 2021

		Market share, M05/YTD'21 <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>
<b>Total pharma market</b>		100,0%	98%	49%
1	KRKA	3,3%	77%	61%
2	SANOFI-AVENTIS	2,7%	92%	69%
3	MENARINI	2,6%	18%	1%
4	WORLD MEDICINE	2,4%	288%	248%
5	NOVARTIS	2,3%	82%	52%
6	FARMAK KIEV	2,3%	86%	52%
7	GM PHARMACEUTICALS	1,9%	109%	94%
8	STADA	1,7%	46%	31%
9	AVISON PHARMACEUTICALS	1,7%	334%	215%
10	YURIA-FARM UKR	1,6%	52%	26%
11	ABBOTT	1,5%	17%	14%
12	GEDEON RICHTER	1,5%	5%	-4%
13	NIKA-PHARM	1,5%	60%	2%
14	ZHURABEK LAB	1,4%	17%	-20%
15	BAYER HEALTHCARE	1,3%	143%	146%



# TOP-15 brands on Uzbekistan market, January-May 2021

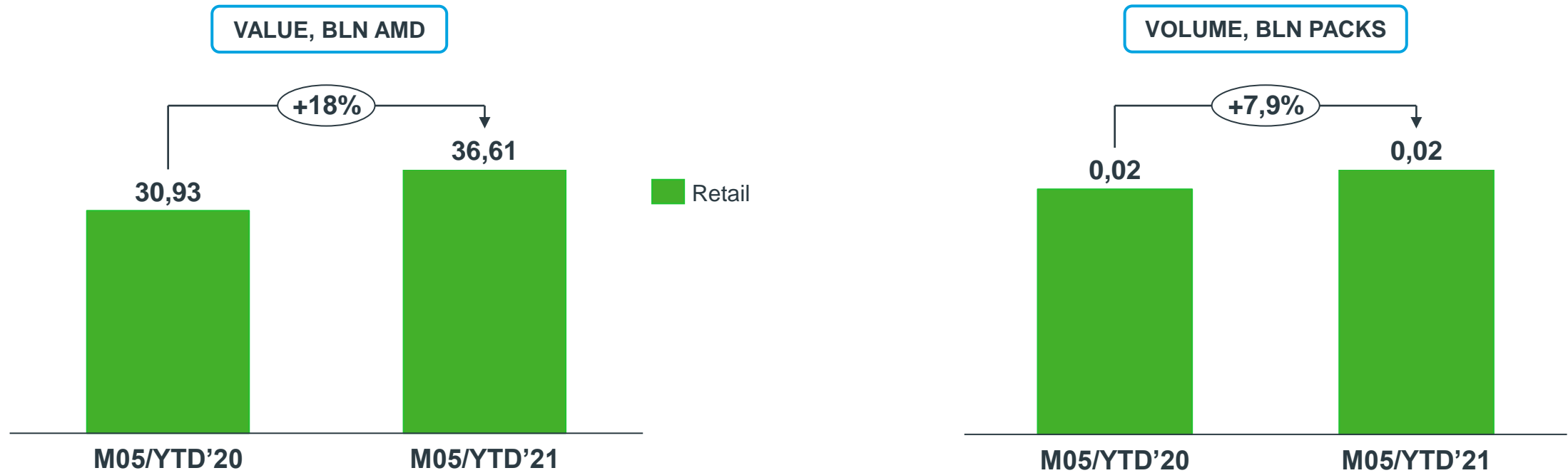


Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices



# Armenia pharma market growth in January-May 2021

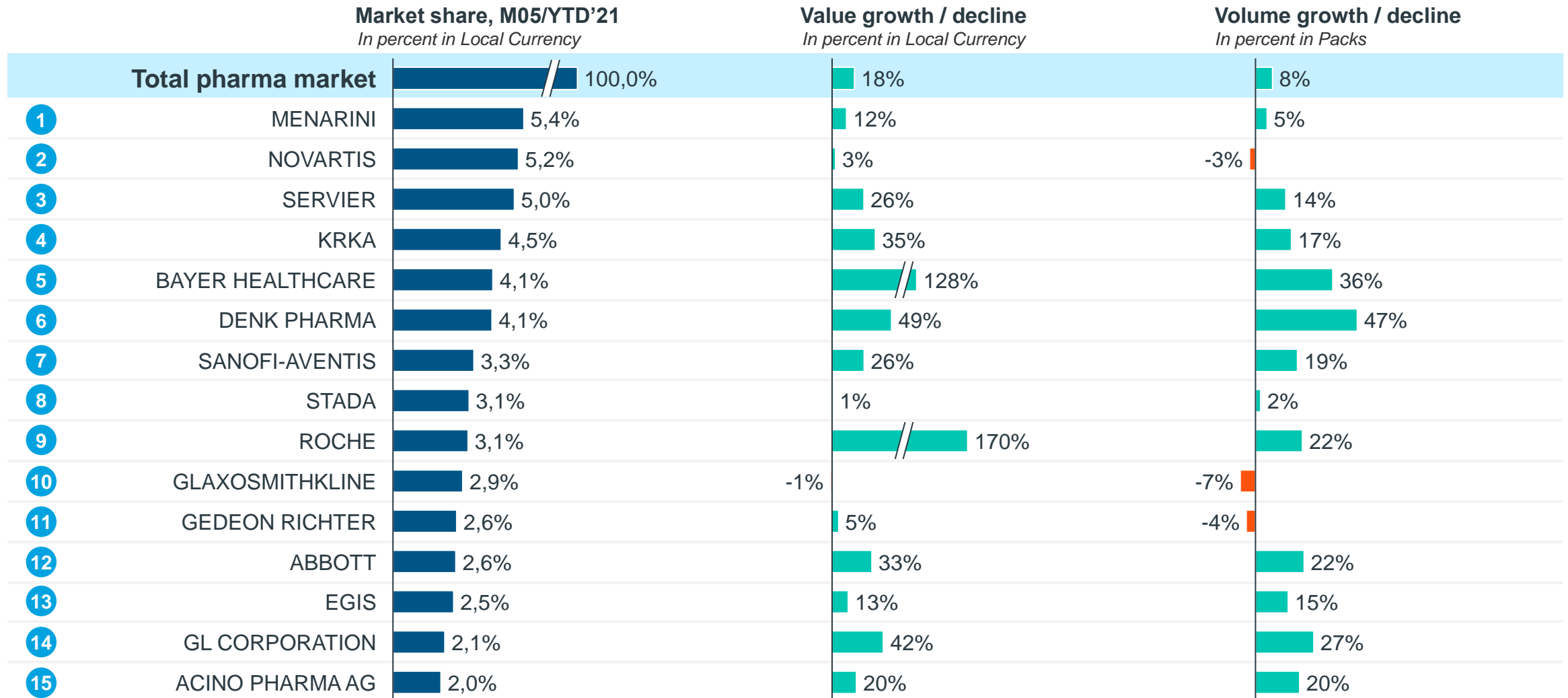
Market grew by 18,4% in value and by 7,9% in volume



Indicator	AMD	USD	EUR	PACKS
Value M05/YTD'21, Bln.	36,6	0,07	0,06	0,02
Growth M05/YTD'21, %	▲ 18%	▲ 9,3%	▼ -0,4%	▲ 7,9%

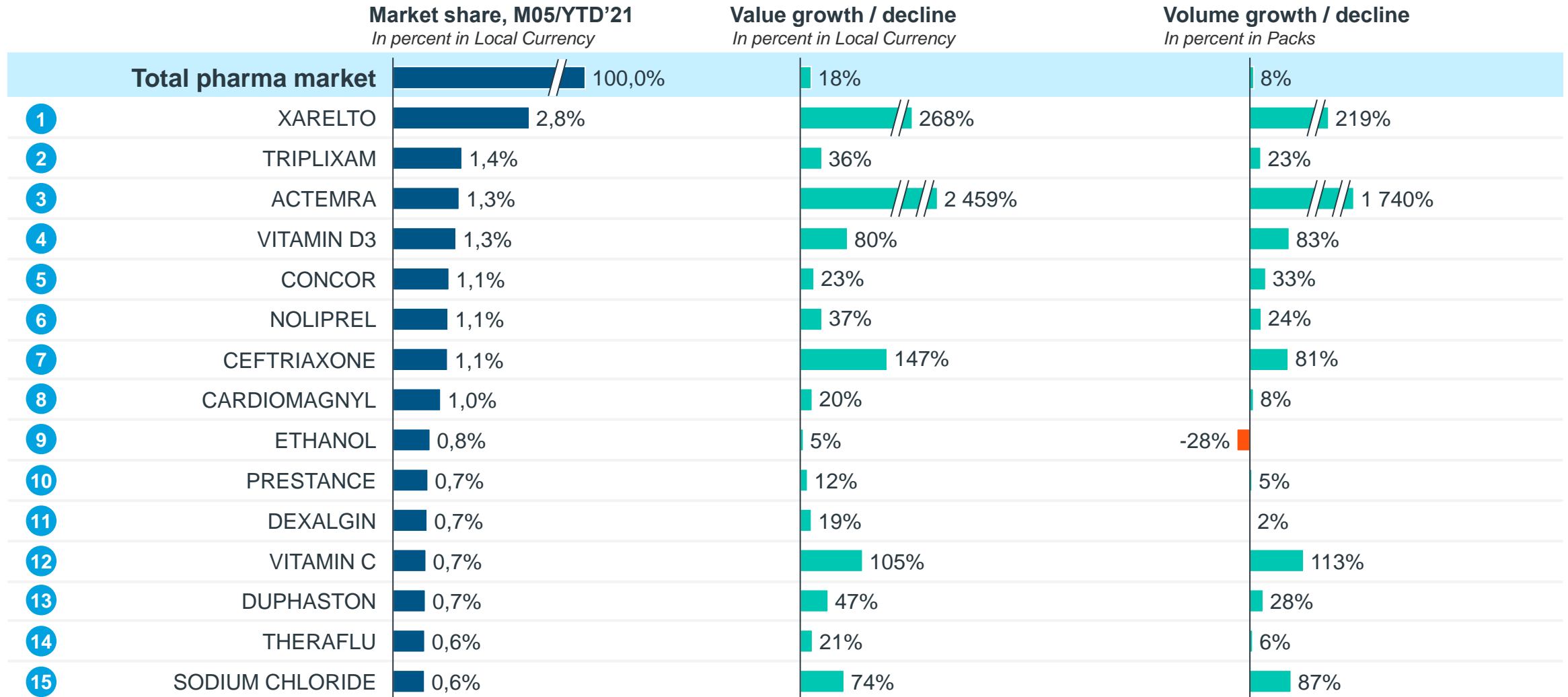


# TOP-15 corporations on Armenia market, January-May 2021





# TOP-15 brands on Armenia market, January-May 2021

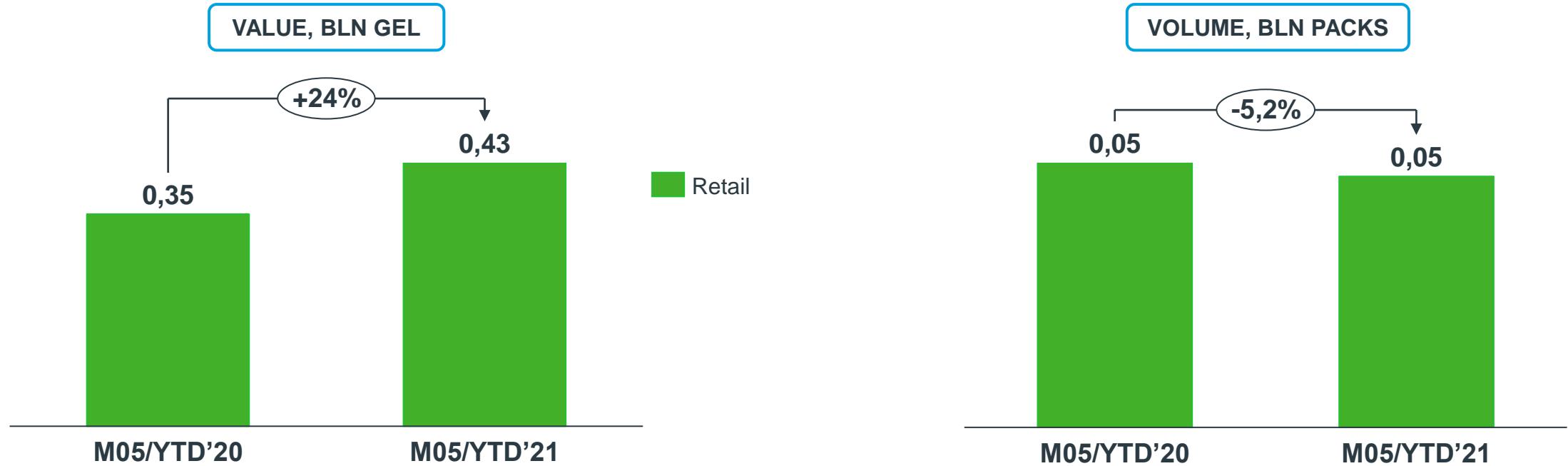






# Georgia pharma market growth in January-May 2021

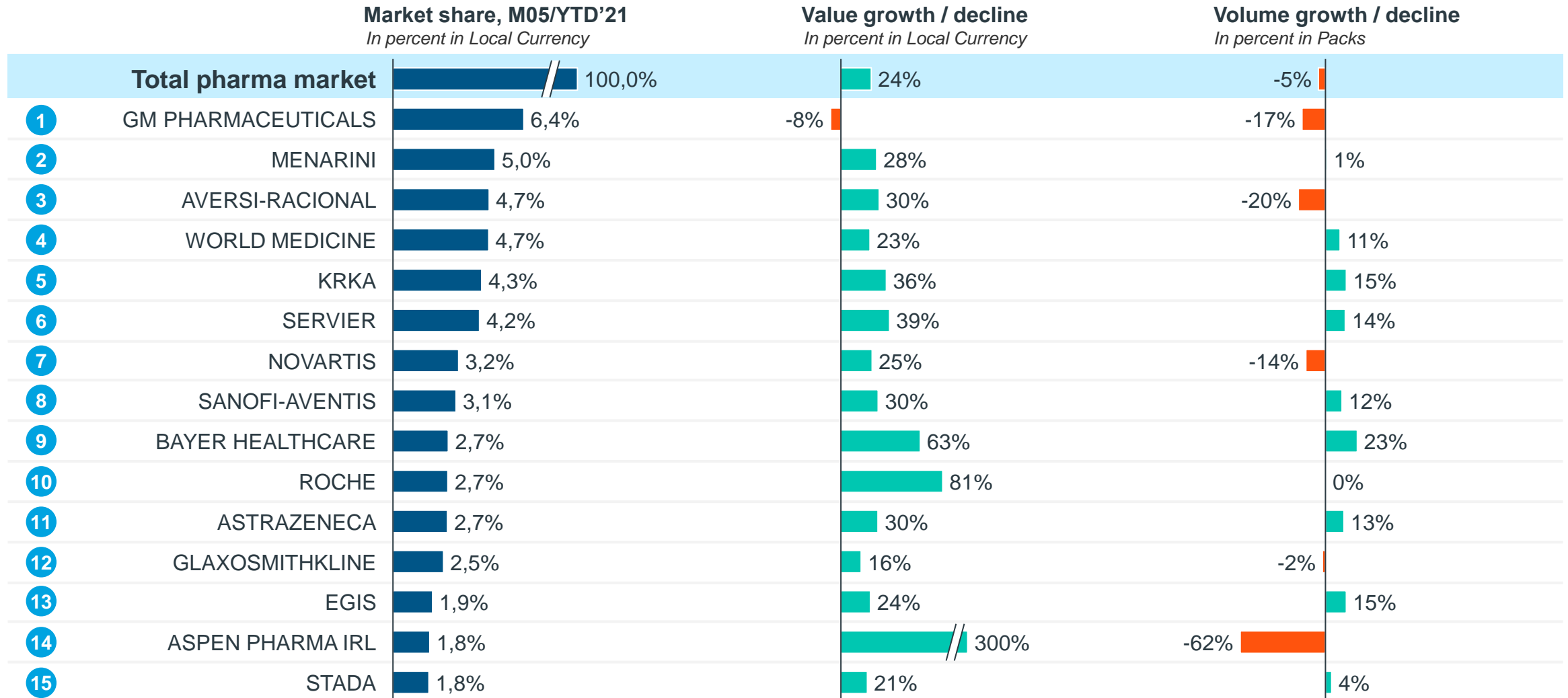
Market grew by 24,2% in value and decreased by 5% in volume



Indicator	GEL	USD	EUR	PACKS
Value M05/YTD'21, Bln.	0,4	0,13	0,11	0,05
Growth M05/YTD'21, %	▲ 24%	▲ 11%	▲ 1,5%	▼ -5,2%

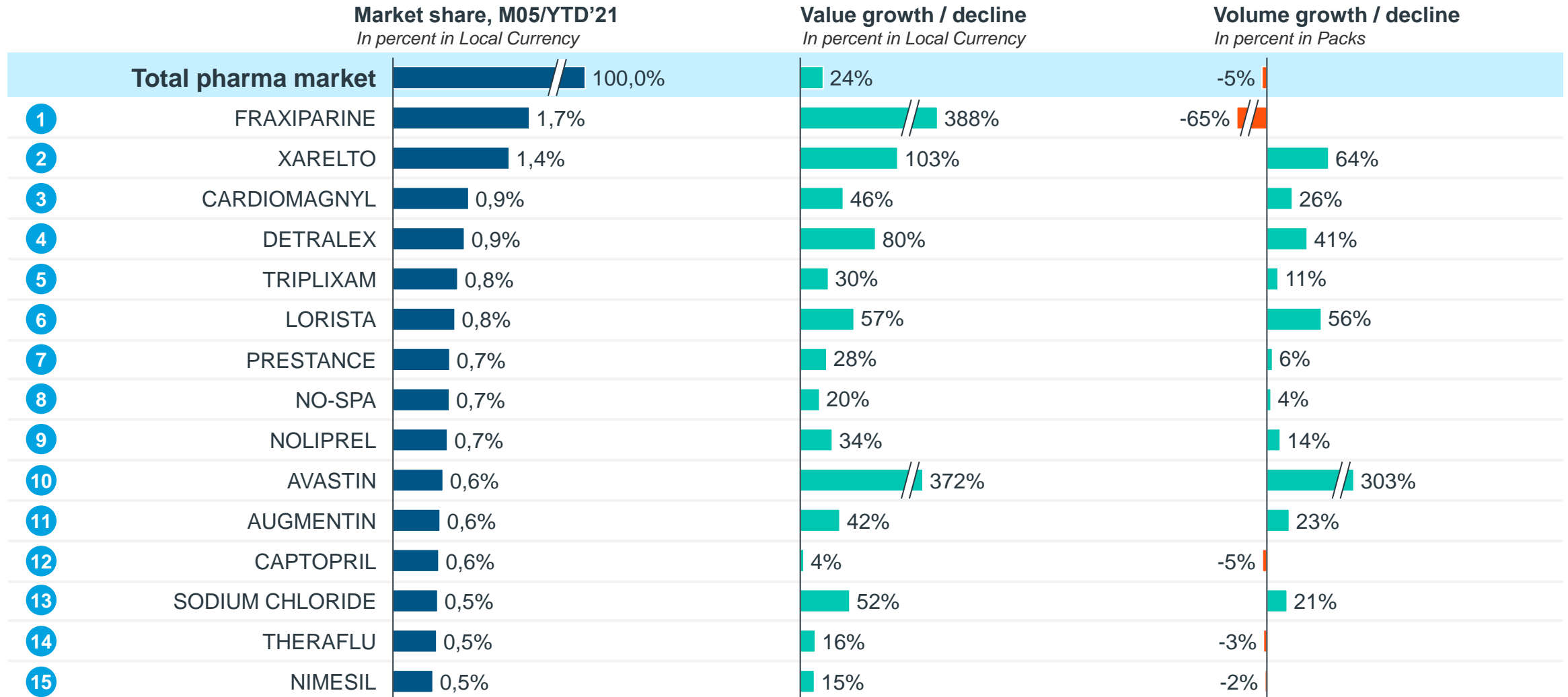


# TOP-15 corporations on Georgia market, January-May 2021





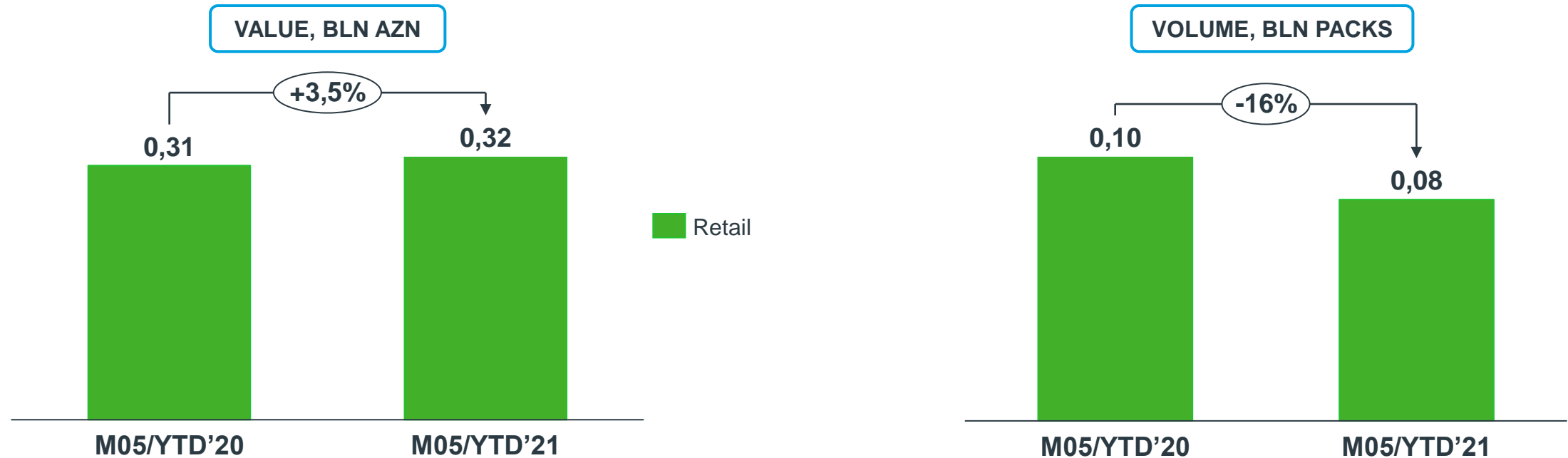
# TOP-15 brands on Georgia market, January-May 2021





# Azerbaijan pharma market growth in January-May 2021

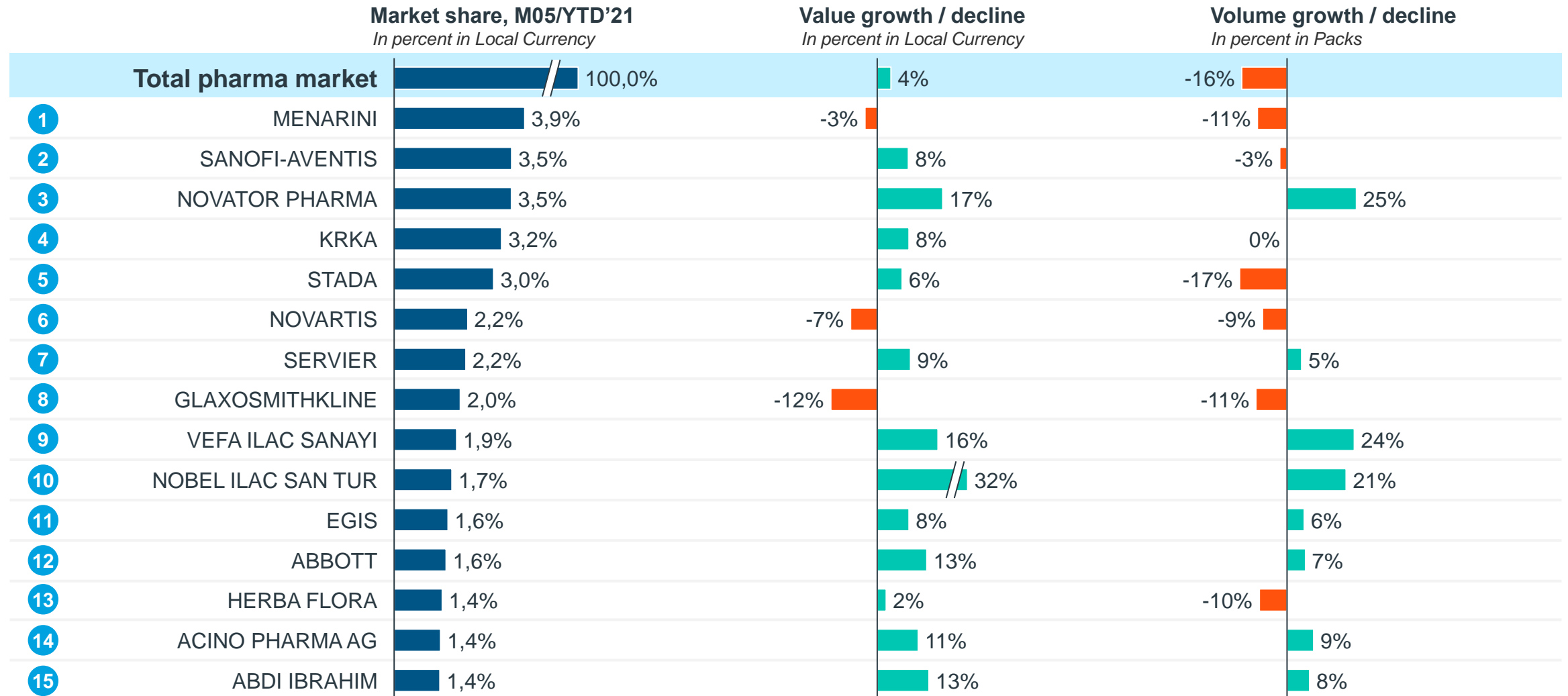
Market grew by 3,5% in value and decreased by 16% in volume



Indicator	AZN	USD	EUR	PACKS
Value M05/YTD'21, Bln.	0,32	0,19	0,16	0,08
Growth M05/YTD'21, %	▲ 3,5%	▲ 3,5%	▼ -5,5%	▼ -16%



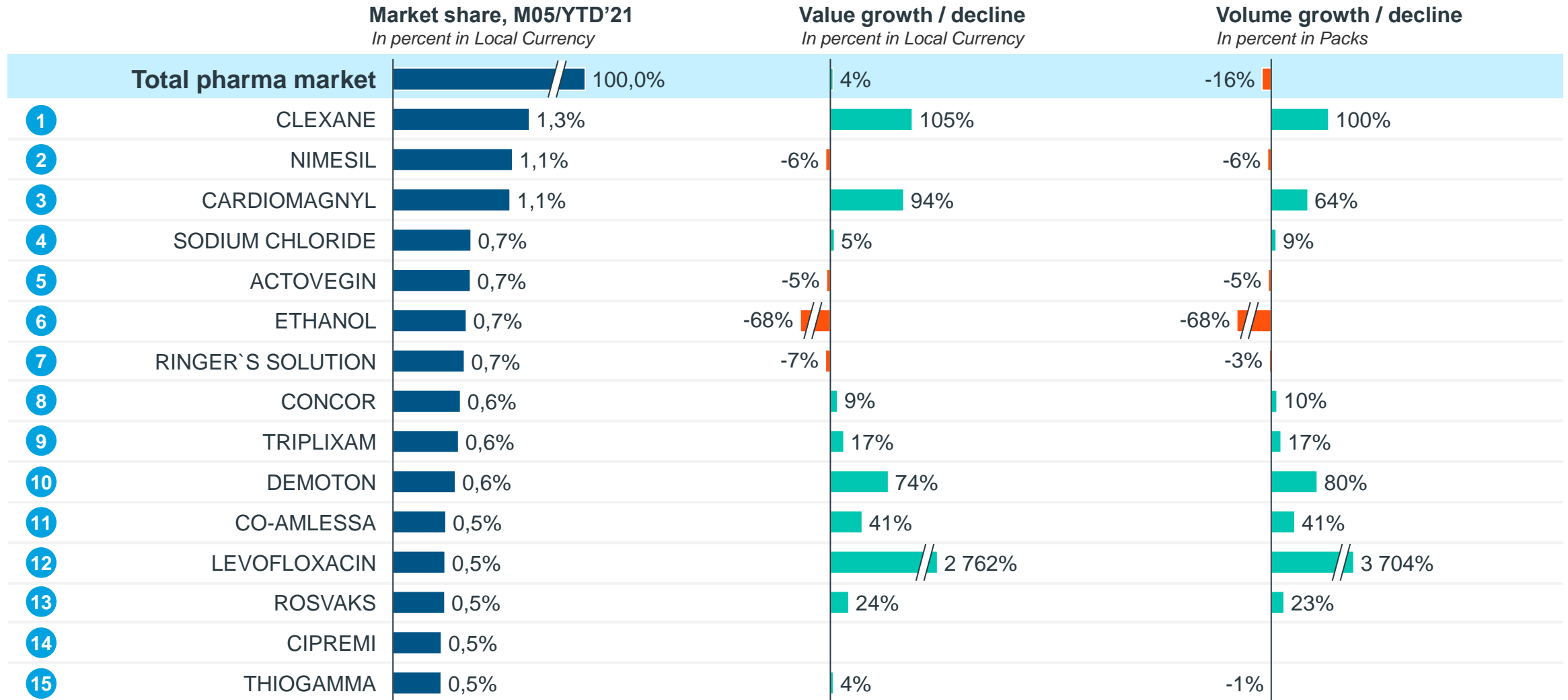
# TOP-15 corporations on Azerbaijan market, January-May 2021



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



# TOP-15 brands on Azerbaijan market, January-May 2021



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