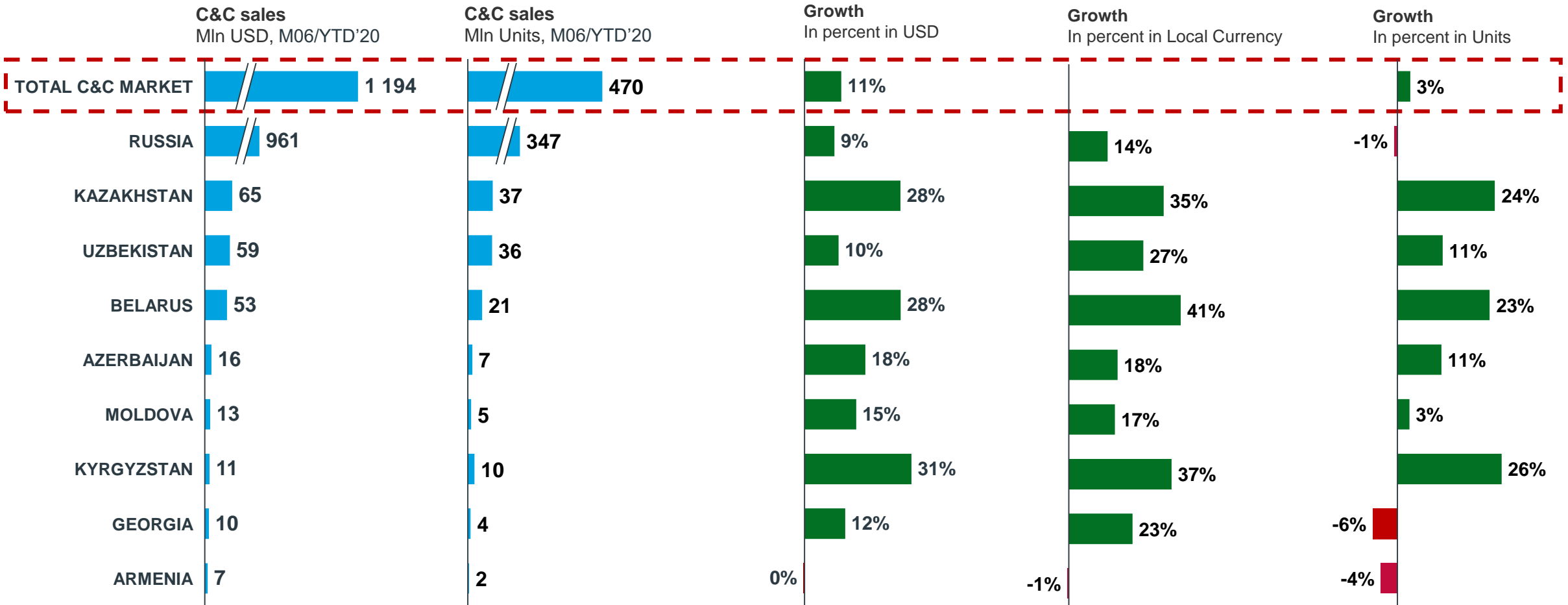


# Facts from IQVIA

M06 2020

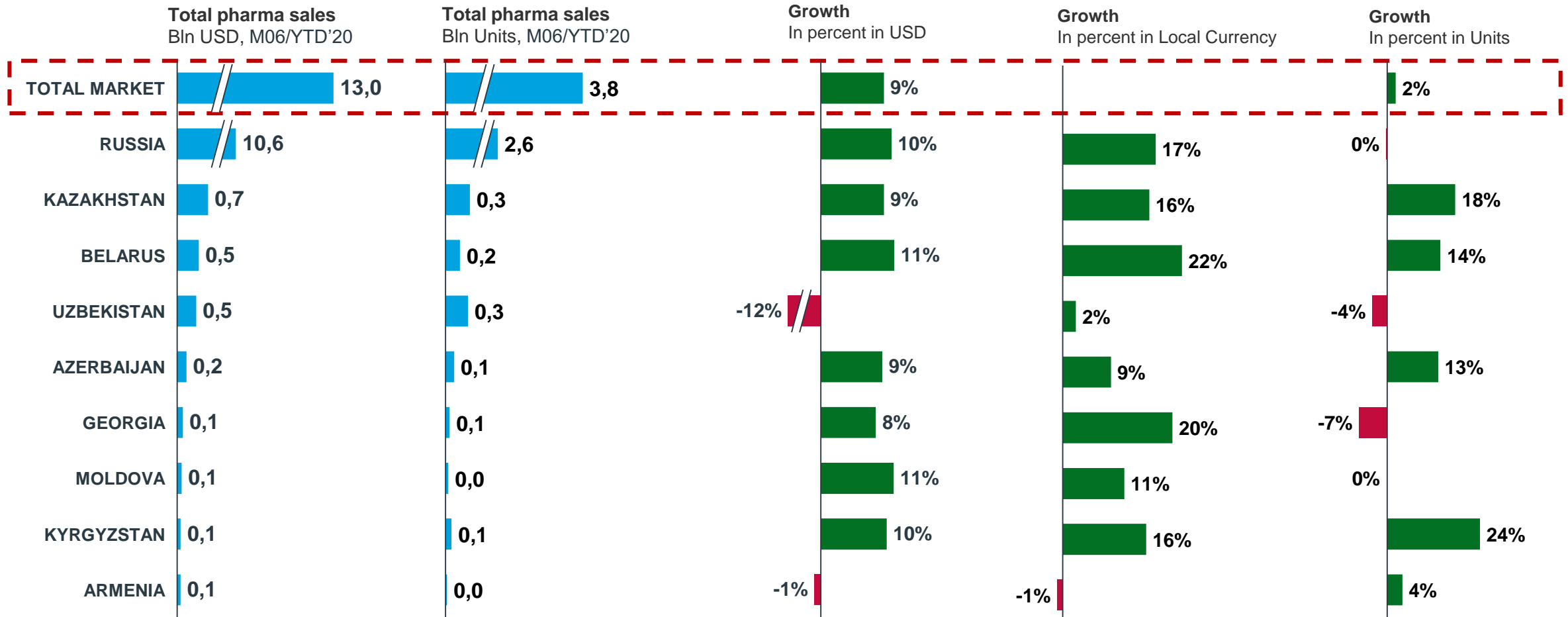
# EAEU & CIS, Russia Cough&Cold category in January-June 2020, Value in Mln. USD and Units

C&C increases by 11% in USD and by 3,2% in volume



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

Total Market increases by 9% in USD and by 2,2% in volume



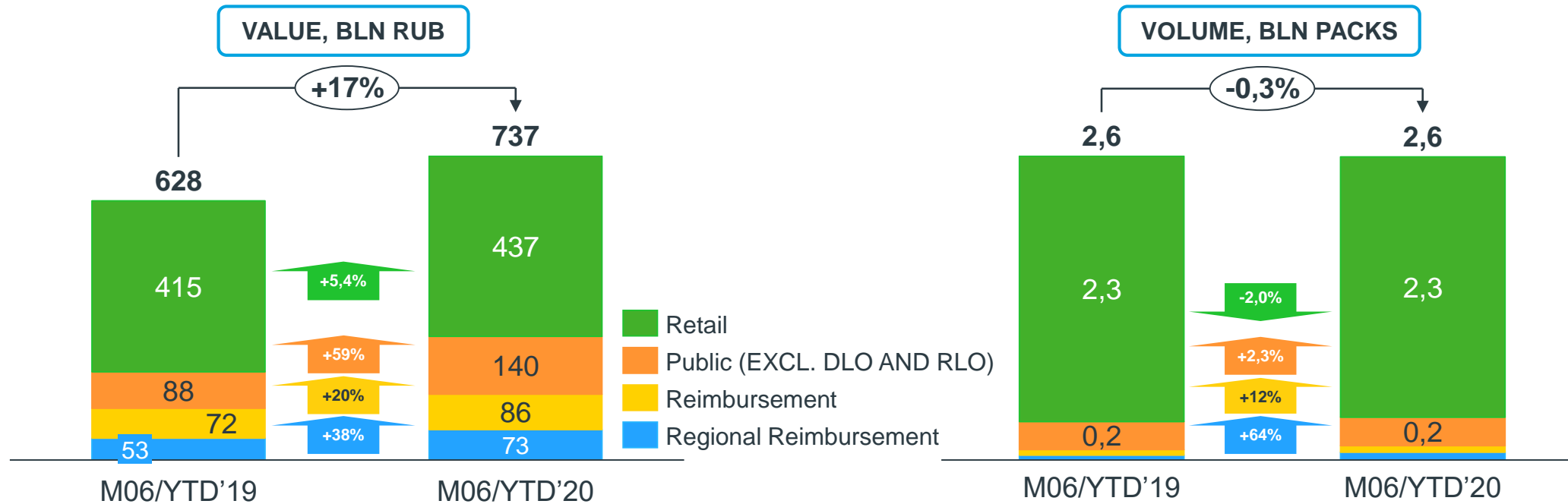
Source: IQVIA database (TRD prices)

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-June 2020

Market grew by 17% in value and decreased by 0,3% in volume

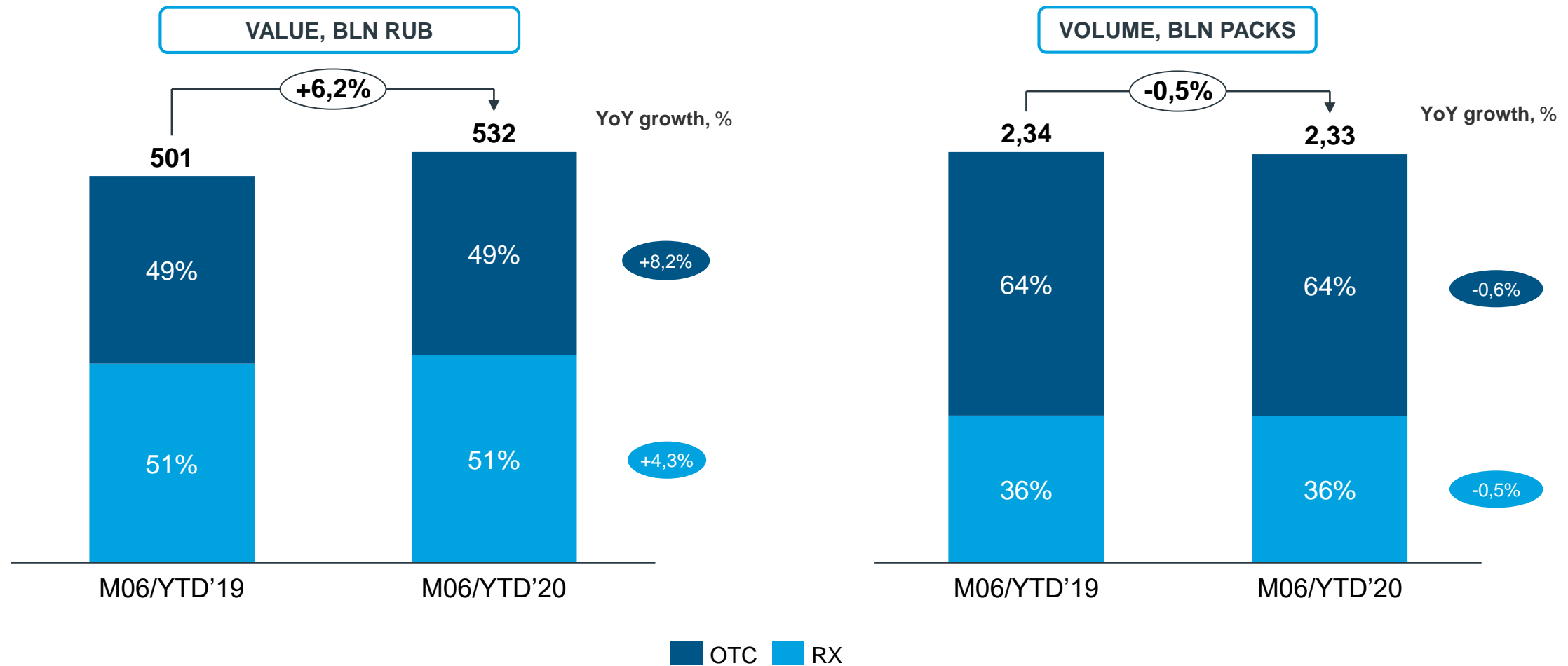


Indicator	RUB	USD	EUR	PACKS
Value M06/YTD'20, Bln.	737	10,6	9,6	2,6
Growth M06/YTD'20%	▲ 17%	▲ 10%	▲ 13%	▼ -0,3%



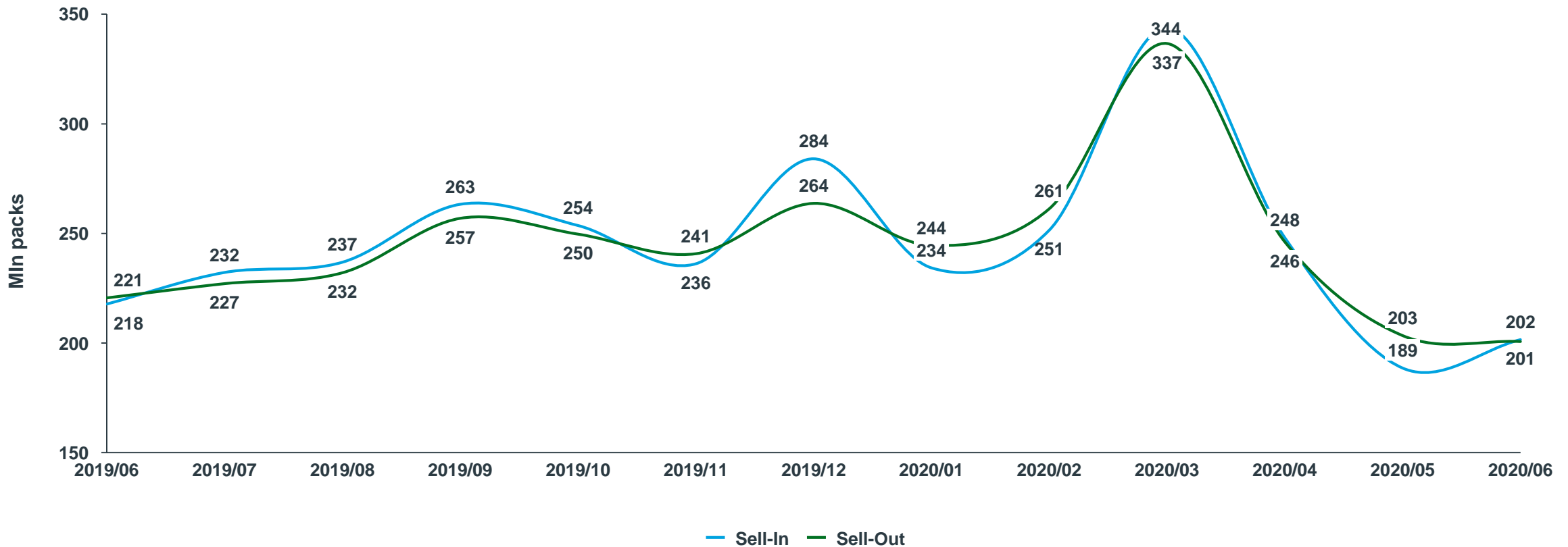
# Russian pharma market growth in January-June 2020

*Retail Sell-Out: Market grew by 6,2% in value and decreased by 0,5% in volume*



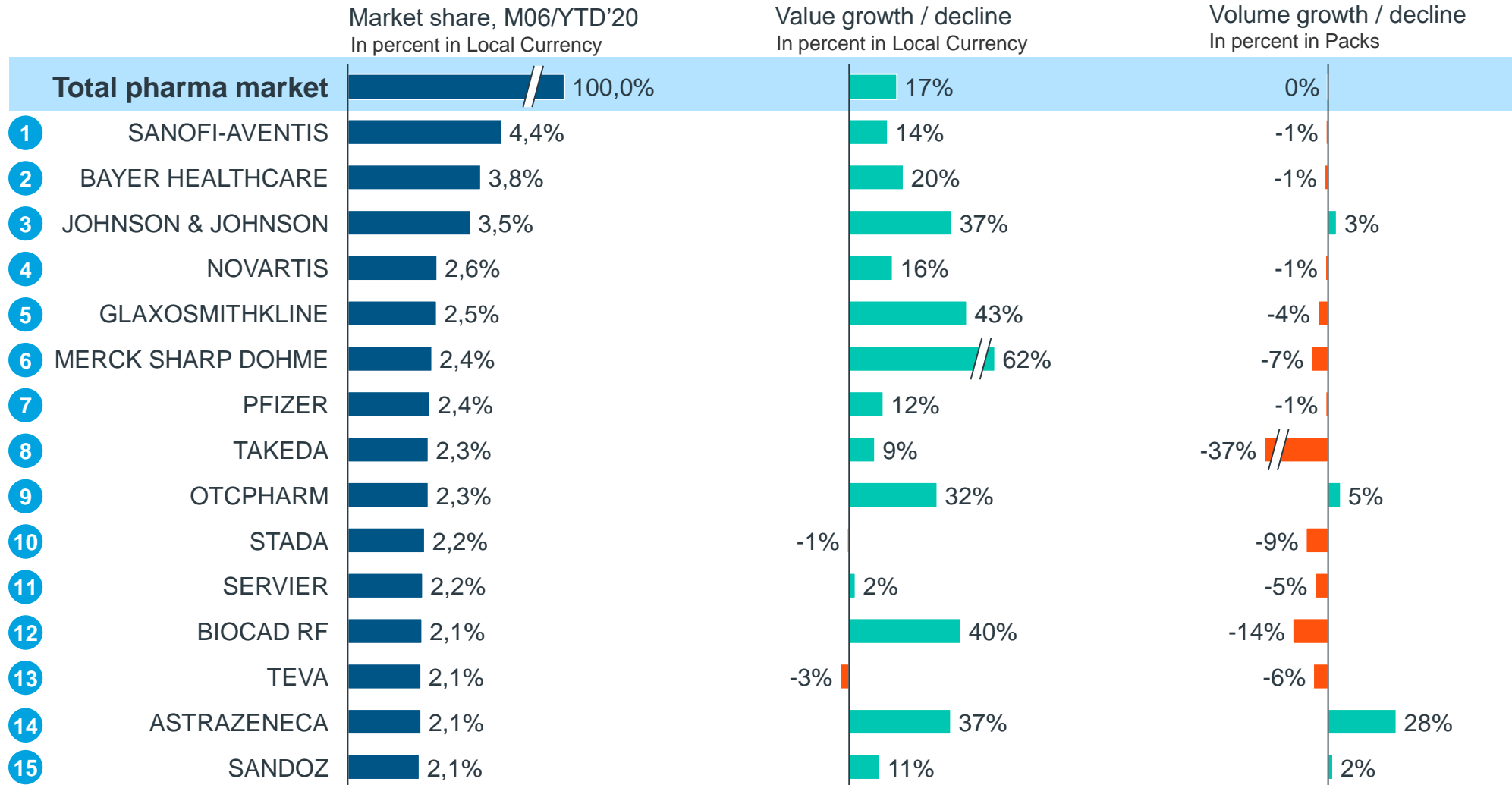


# Sell-In vs Sell-Out, OTC registered drugs





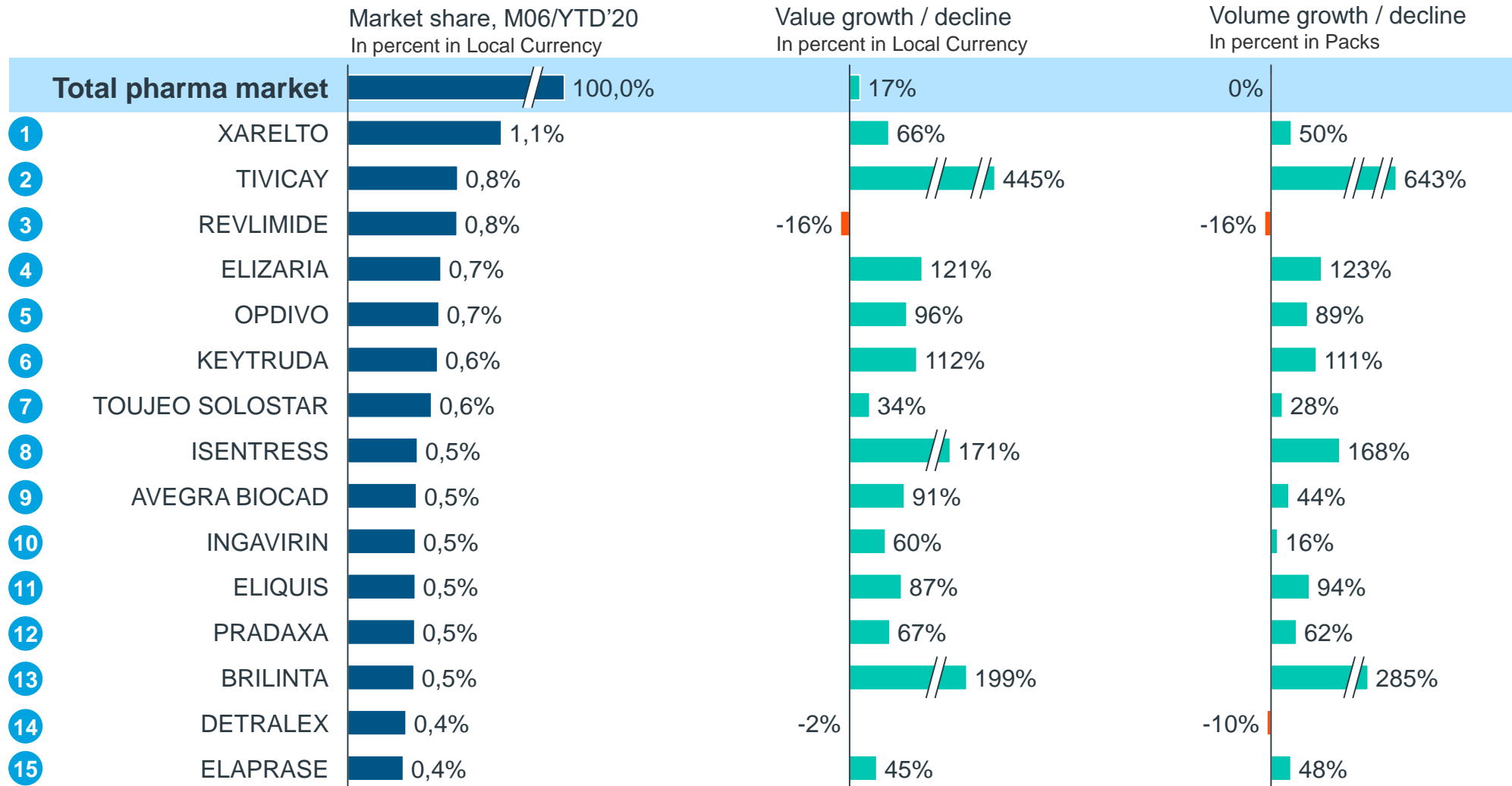
# TOP-15 corporations on Russian market, January-June 2020



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

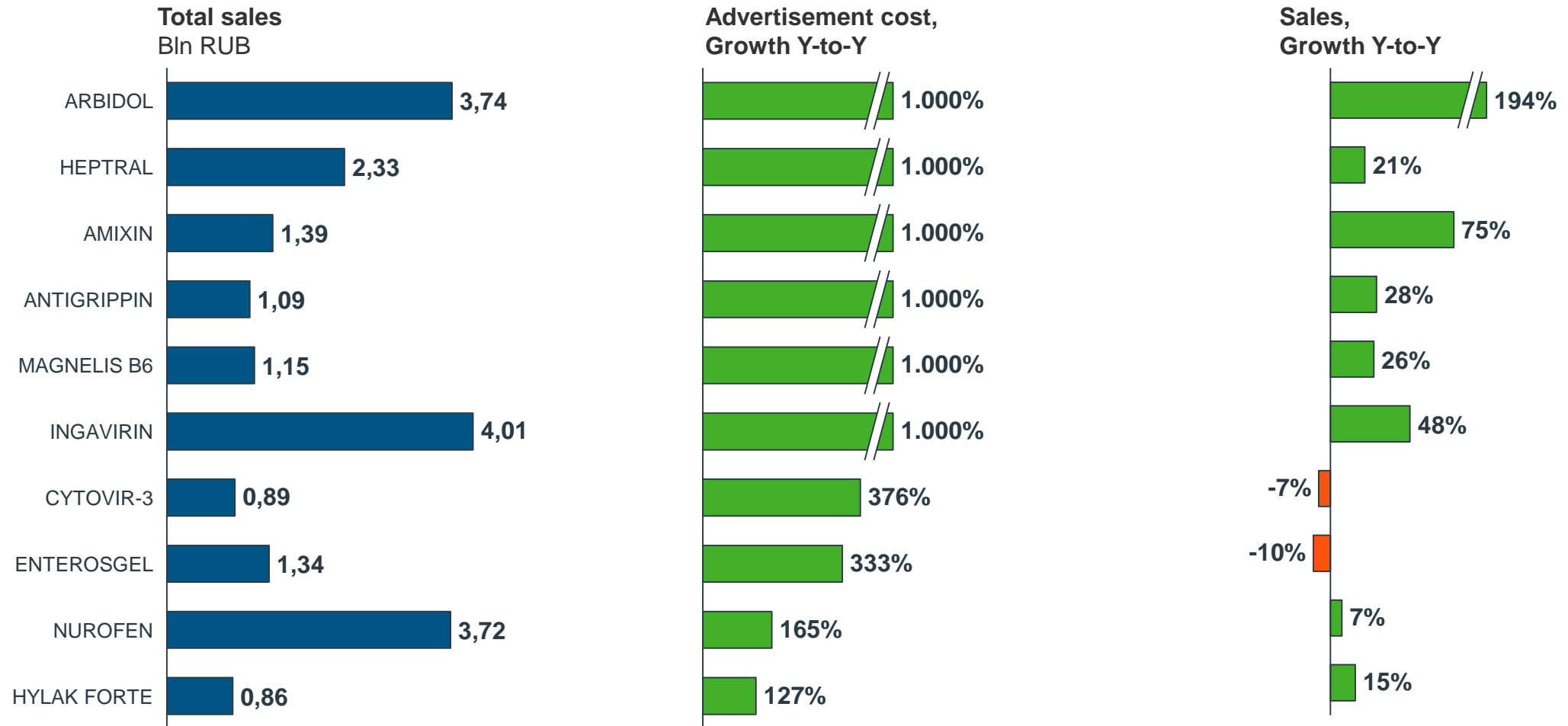


# TOP-15 brands on Russian market, January-June 2020



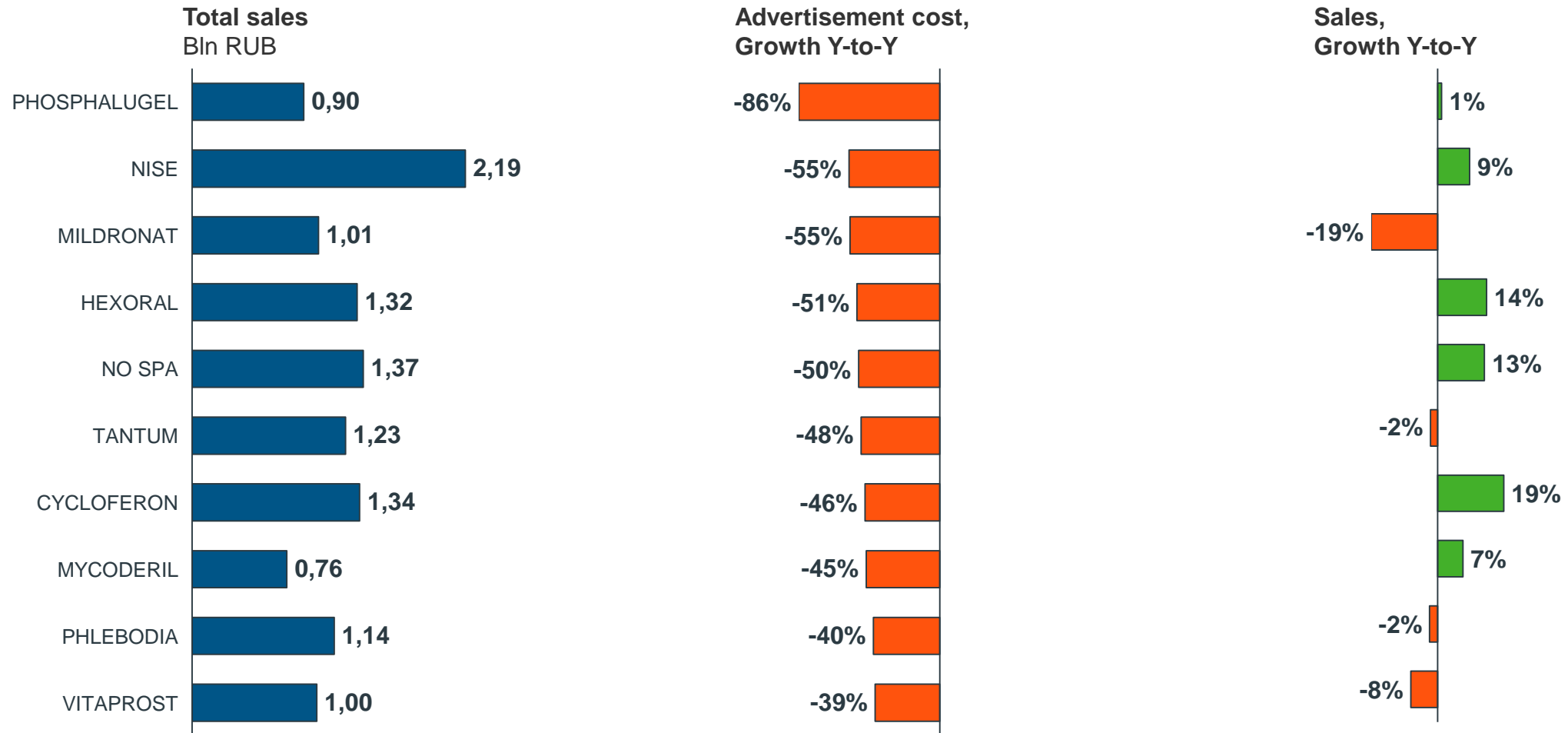


# TOP-10 products by growth in advertisement investments in January-June 2020



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-June 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

# Rating of Russian distributors, 1-2Q 2020



# TOP-10 distributors on the market of gross sales, 1-2Q 2020

#	Distributor	Market share in gross sales, %		Change in gross sales 1-2Q 2020/1-2Q 2019, %
		1-2Q 2020	1-2Q 2019	
1	Pulse	12,0%	12,4%	12,7%
2	Protek	11,3%	12,8%	2,6%
3	Katren	10,8%	12,3%	2,6%
4	R-Pharm	6,5%	4,3%	75,6%
5	Pharmkomplekt	5,2%	4,7%	28,2%
6	FK Grand Kapital	4,1%	3,8%	25,5%
7	BSS	3,2%	3,5%	7,3%
8	Profitmed	2,6%	2,7%	12,4%
9	GDP	2,1%	2,4%	4,8%
10	Lancet	2,0%	1,7%	44,6%
<b>Total</b>		<b>59,8%</b>	<b>60,6%</b>	<b>21,6%</b>

Source: based on data from distributors participating in the rating

# TOP-10 distributors on the budget market, 1-2Q 2020

#	Distributor	Distributor Type	Head Office	Relative volume of budget sales, 1-2Q 2020	Share of budget sales from the gross sales volume, %
1	R-Pharm	National	Moscow	1,000	66%
2	Pharmstandard**	National	Moscow	0,953	-
3	Irvin 2	Regional	Moscow	0,365	98%
4	BSS	National	S.Petersburg	0,328	44%
5	Lancet	Interregional	Moscow	0,278	58%
5	Protek	National	Moscow	0,248	9%
6	GDP	Interregional	Moscow	0,214	43%
7	Farmimex*	Interregional	Moscow	0,181	40%
9	Severo-zapad	Interregional	S.Petersburg	0,118	88%
10	ESKO	Interregional	Moscow	0,105	79%

\*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, 1-2Q 2020

#	Distributor	Distributor Type	Head Office	Relative volume of secondary distribution, 1-2Q 2020	Share of secondary distribution sales from the gross sales volume, %
1	R-Pharm	National	Moscow	1,000	26%
2	Firma Euroservice	Interregional	Moscow	0,611	85%
3	Lancet	Interregional	Moscow	0,466	38%
4	Pharmkomplekt	National	N.Novgorod	0,441	14%
5	Asfadis*	Interregional	Moscow	0,389	33%
6	Pharmservice	Regional	Krasnodar	0,275	75%
7	Pulse	National	Khimki	0,274	4%
8	Protek	National	Moscow	0,259	4%
9	Farmacevt	Interregional	Rostov-on-don	0,198	47%
10	Katren	National	Novosibirsk	0,180	3%

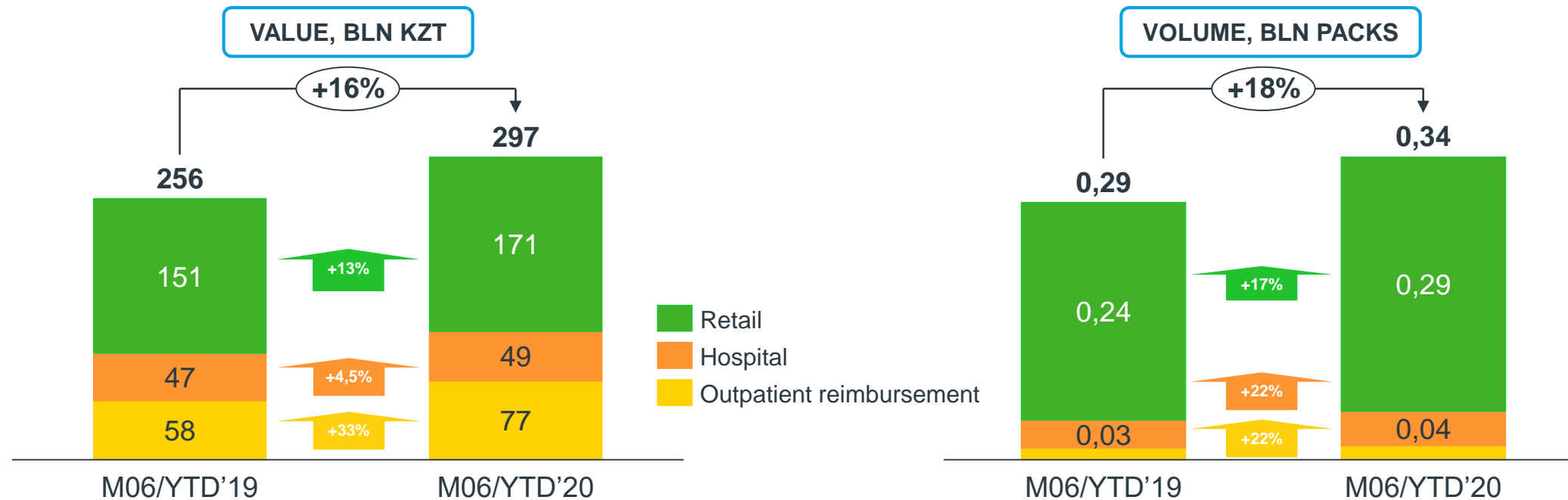
\*«Asfadis» distributors association: Accentmed, Avikon FC, Lesan Pharma, Alenfarma, Asti Plus, Donsky Hospital, Asti.

Source: based on data from distributors participating in the rating



# Kazakhstan pharma market growth in January-June 2020

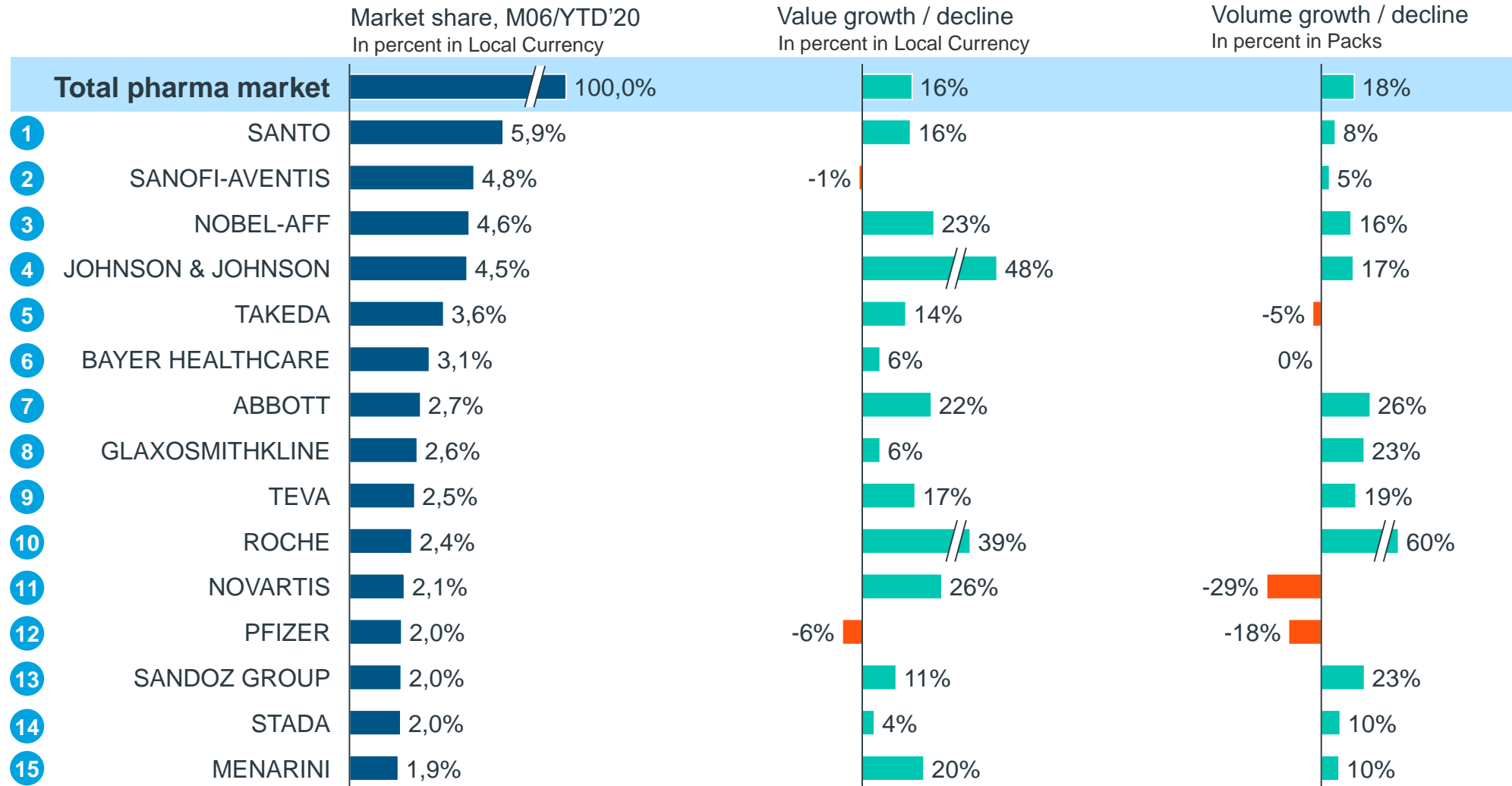
Market grew by 16% in value and by 18% in volume



Indicator	KZT	USD	EUR	PACKS
Value M06/YTD'20, Bln.	297	0,74	0,67	0,34
Growth M06/YTD'20%	▲ 16%	▲ 9,2%	▲ 12%	▲ 18%



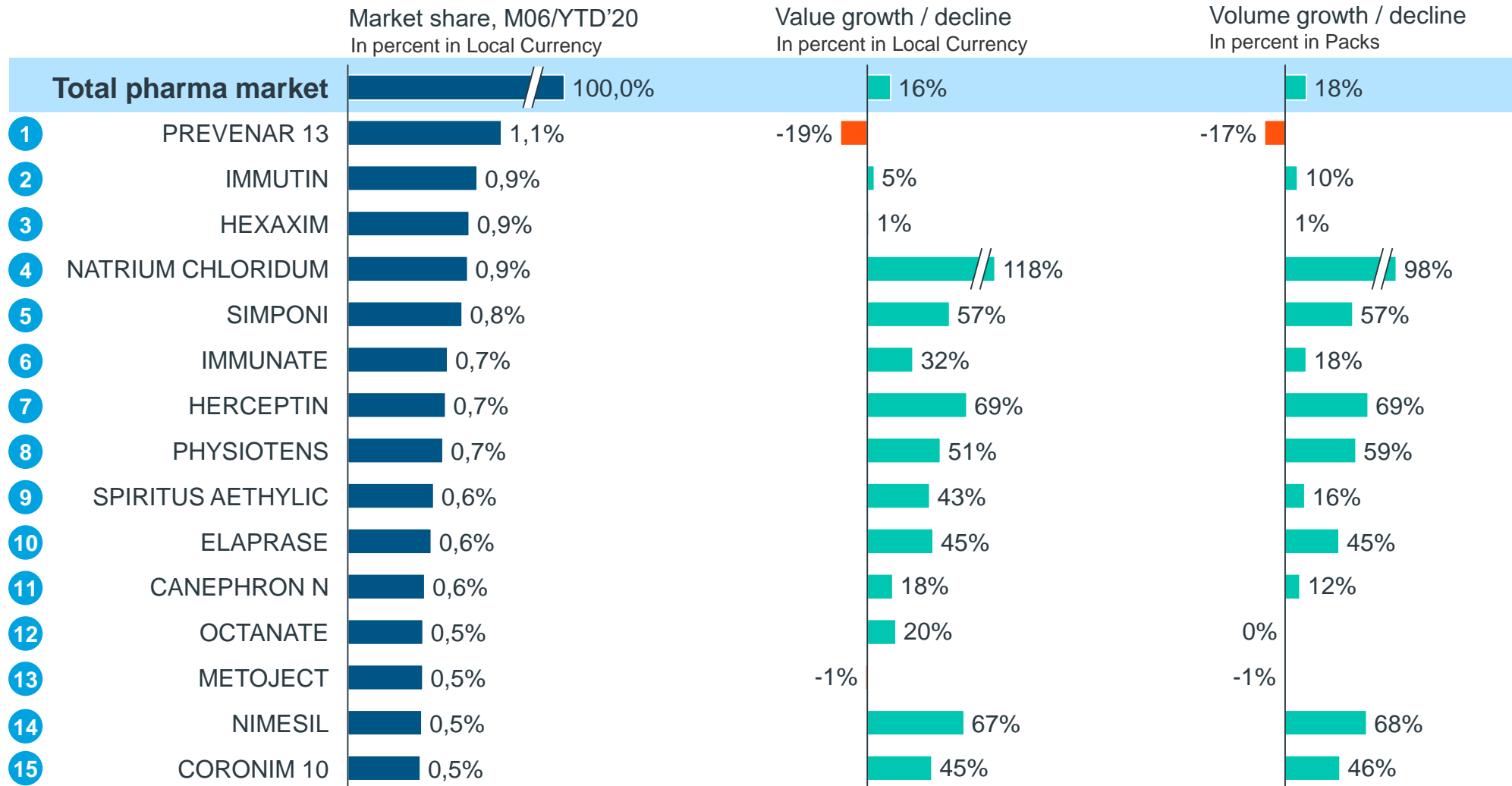
# TOP-15 corporations on Kazakhstan market, January-June 2020







# TOP-15 brands on Kazakhstan market, January-June 2020

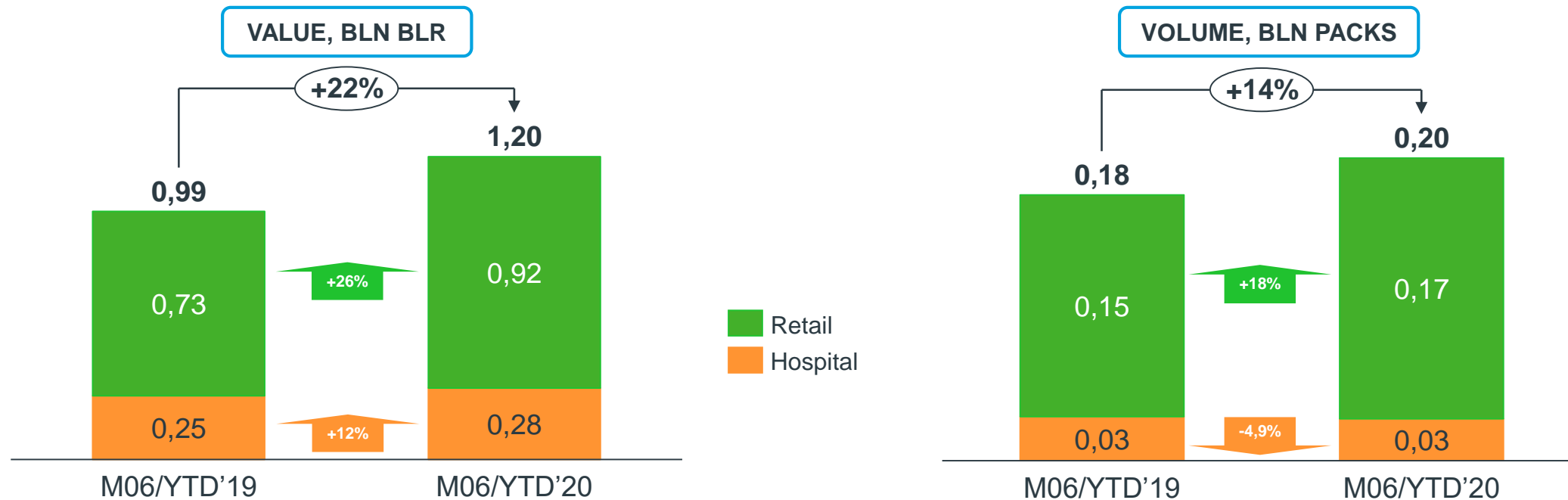


Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices



# Belarus pharma market growth in January-June 2020

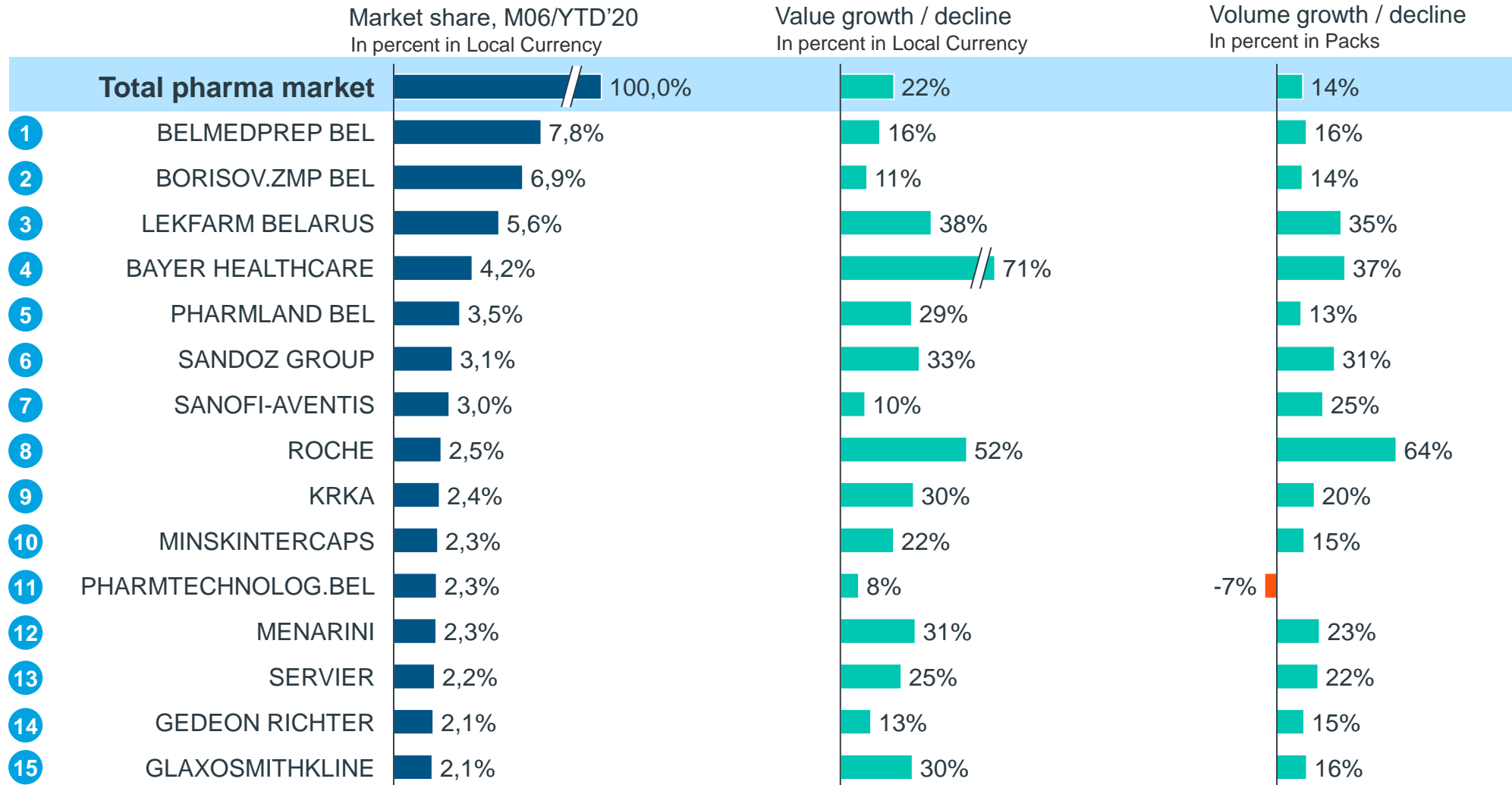
Market grew by 22% in value and by 14% in volume



Indicator	BLR	USD	EUR	PACKS
Value M06/YTD'20, Bln.	1,20	0,51	0,47	0,20
Growth M06/YTD'20%	▲ 22%	▲ 11%	▲ 14%	▲ 14%



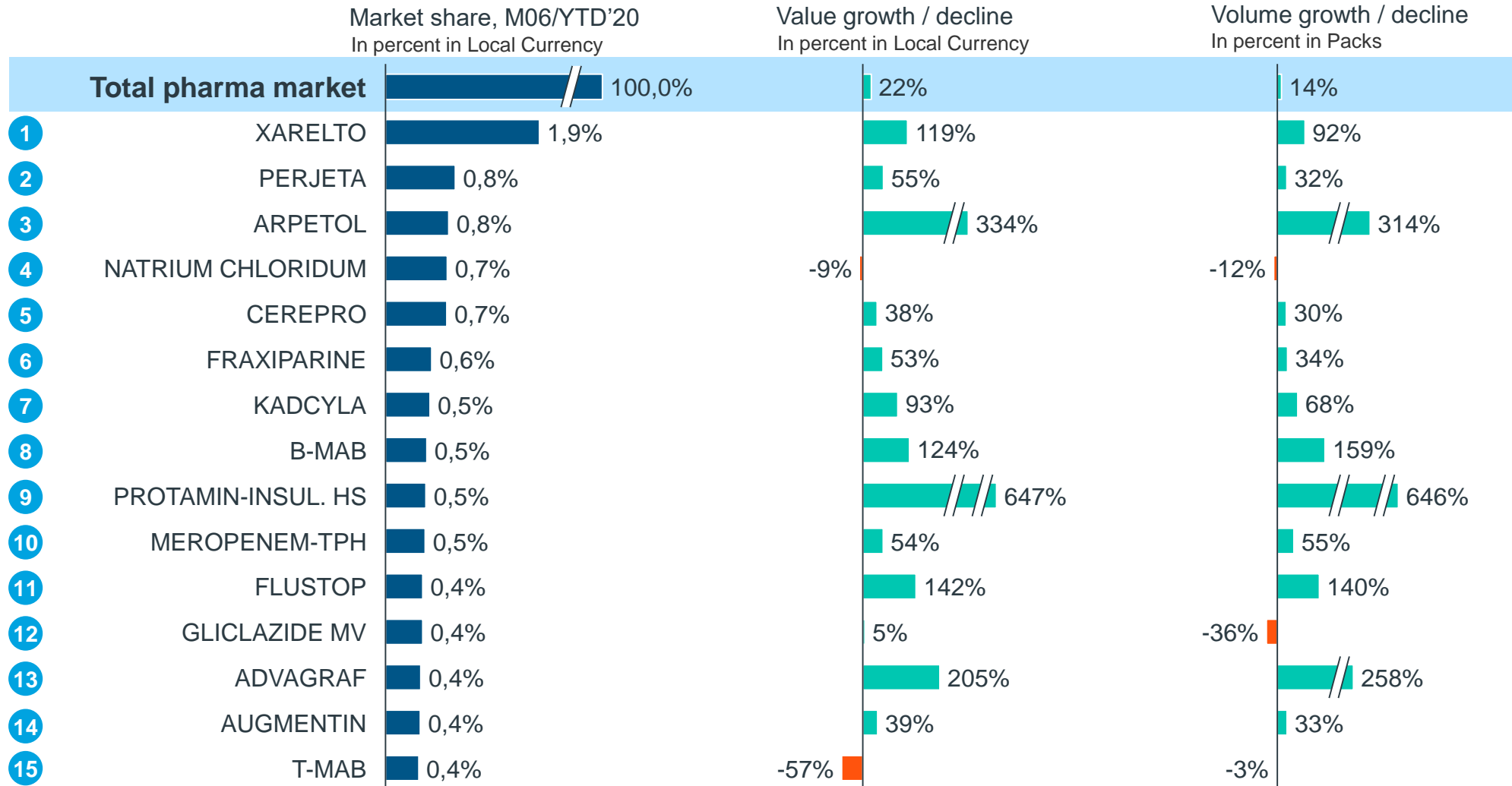
# TOP-15 corporations on Belarus market, January-June 2020



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



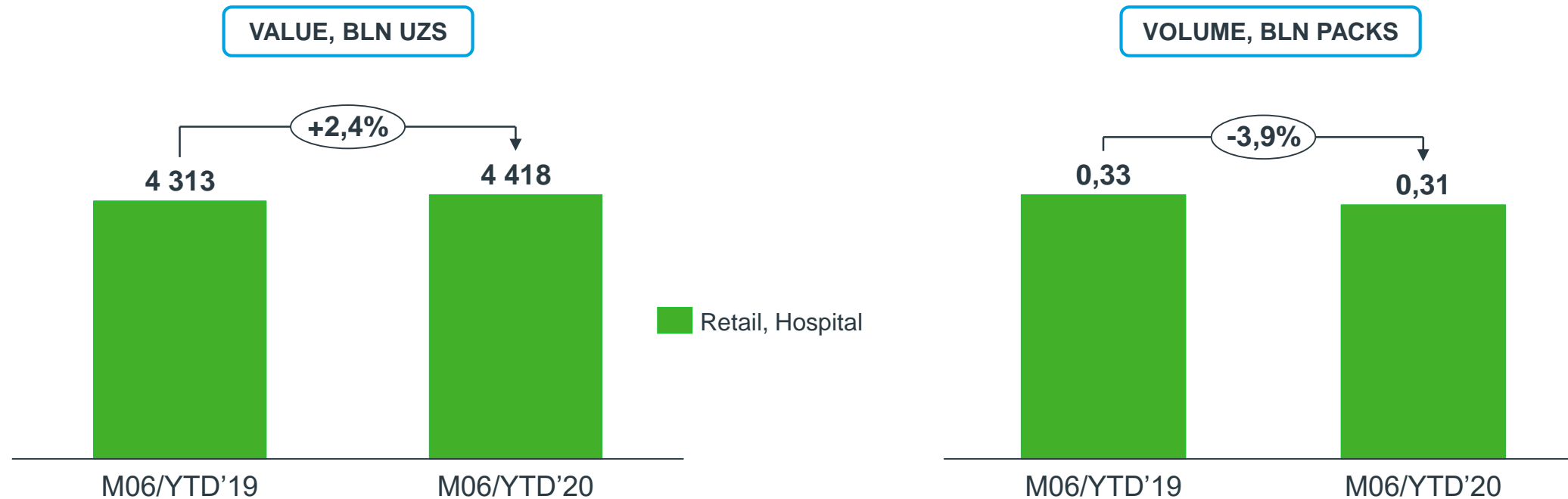
# TOP-15 brands on Belarus market, January-June 2020





# Uzbekistan pharma market growth in January-June 2020

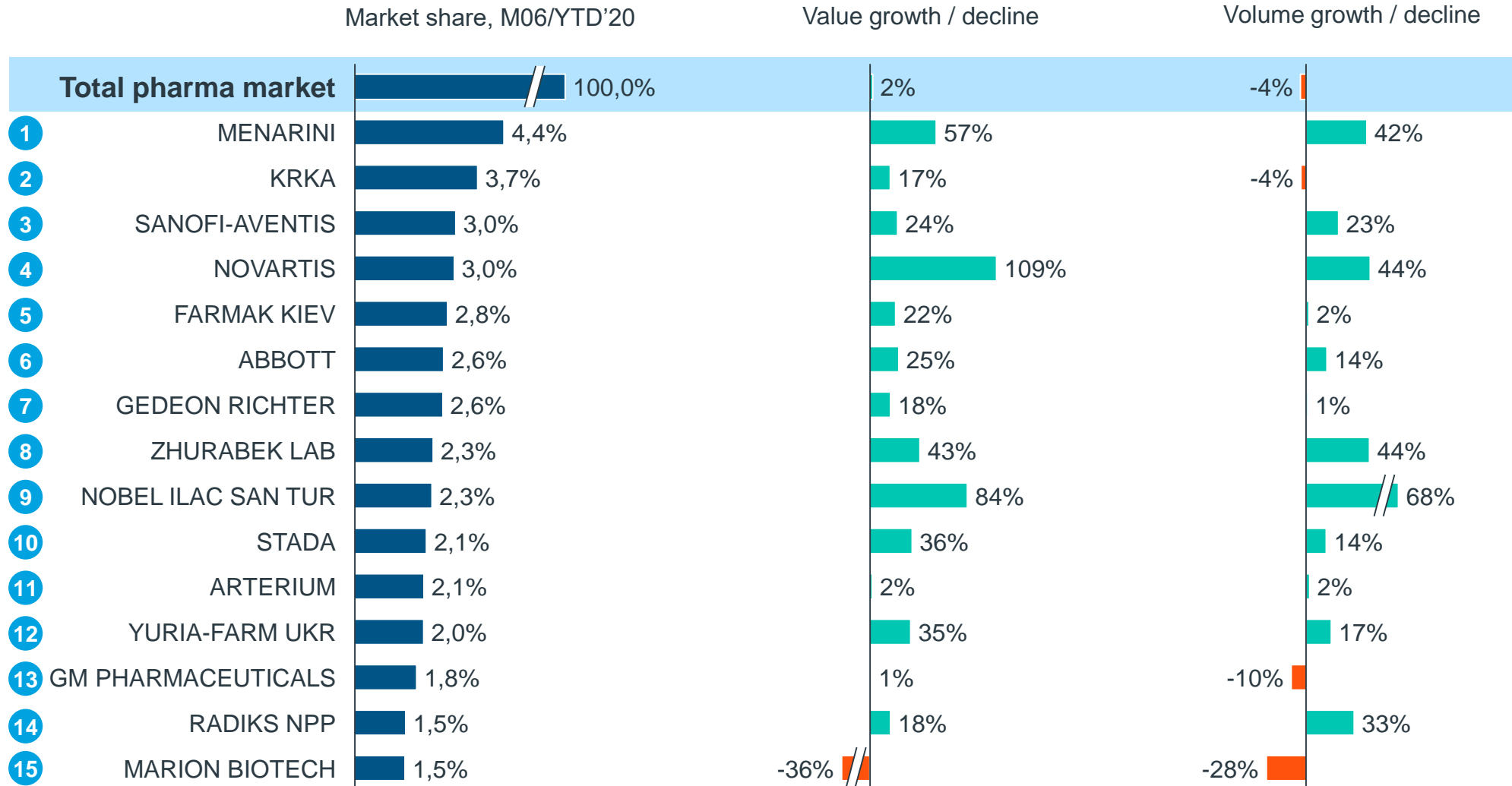
Market grew by 2,4% in value and decreased by 3,9% in volume



Indicator	UZS	USD	EUR	PACKS
Value M06/YTD'20, Bln.	4 418	0,45	0,41	0,31
Growth M06/YTD'20%	▲ 2,4%	▼ -12%	▼ -9,3%	▼ -3,9%



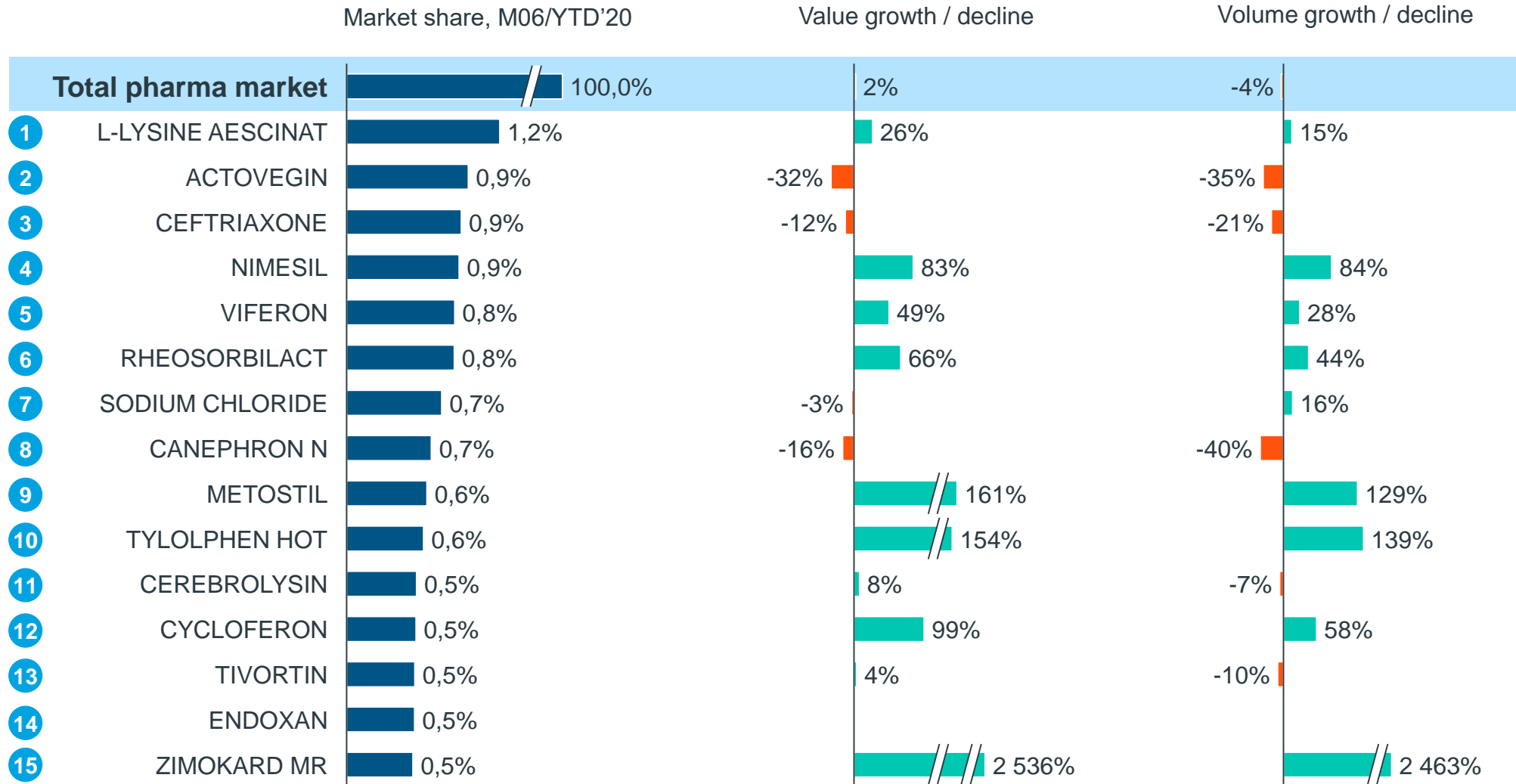
# TOP-15 corporations on Uzbekistan market, January-June 2020



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



# TOP-15 brands on Uzbekistan market, January-June 2020

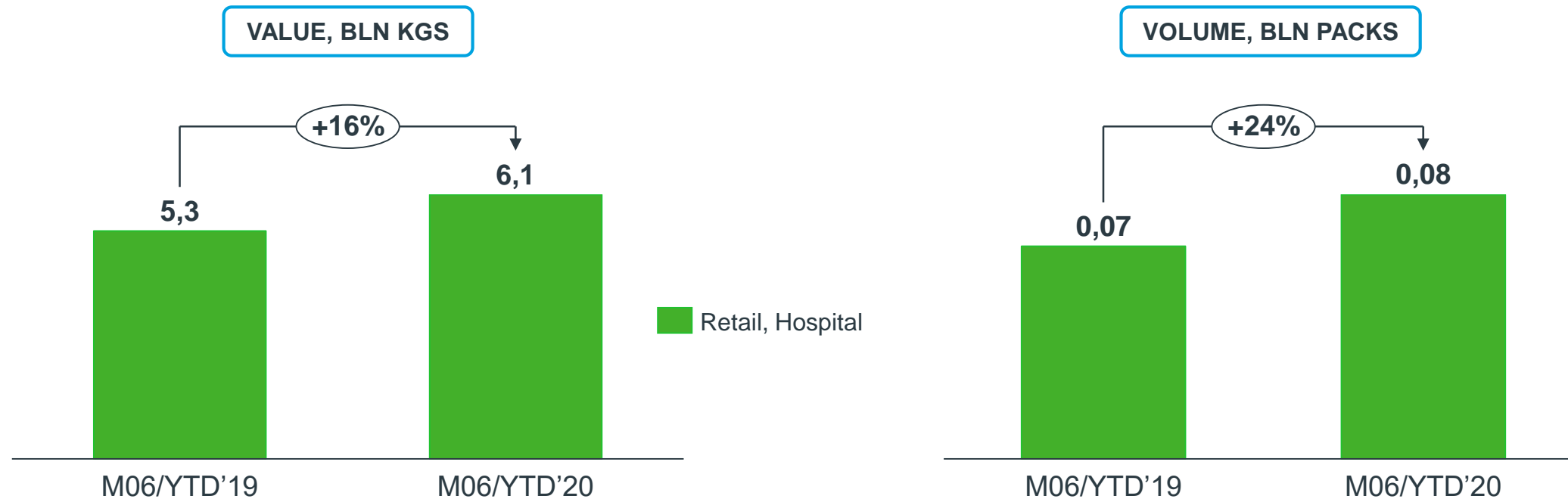


Source: IQVIA databases. Retail and Hospital Market (exclude food supplements and diagnostic agents), TRD Prices



# Kyrgyzstan pharma market growth in January-June 2020

Market grew by 16% in value and by 24% in volume

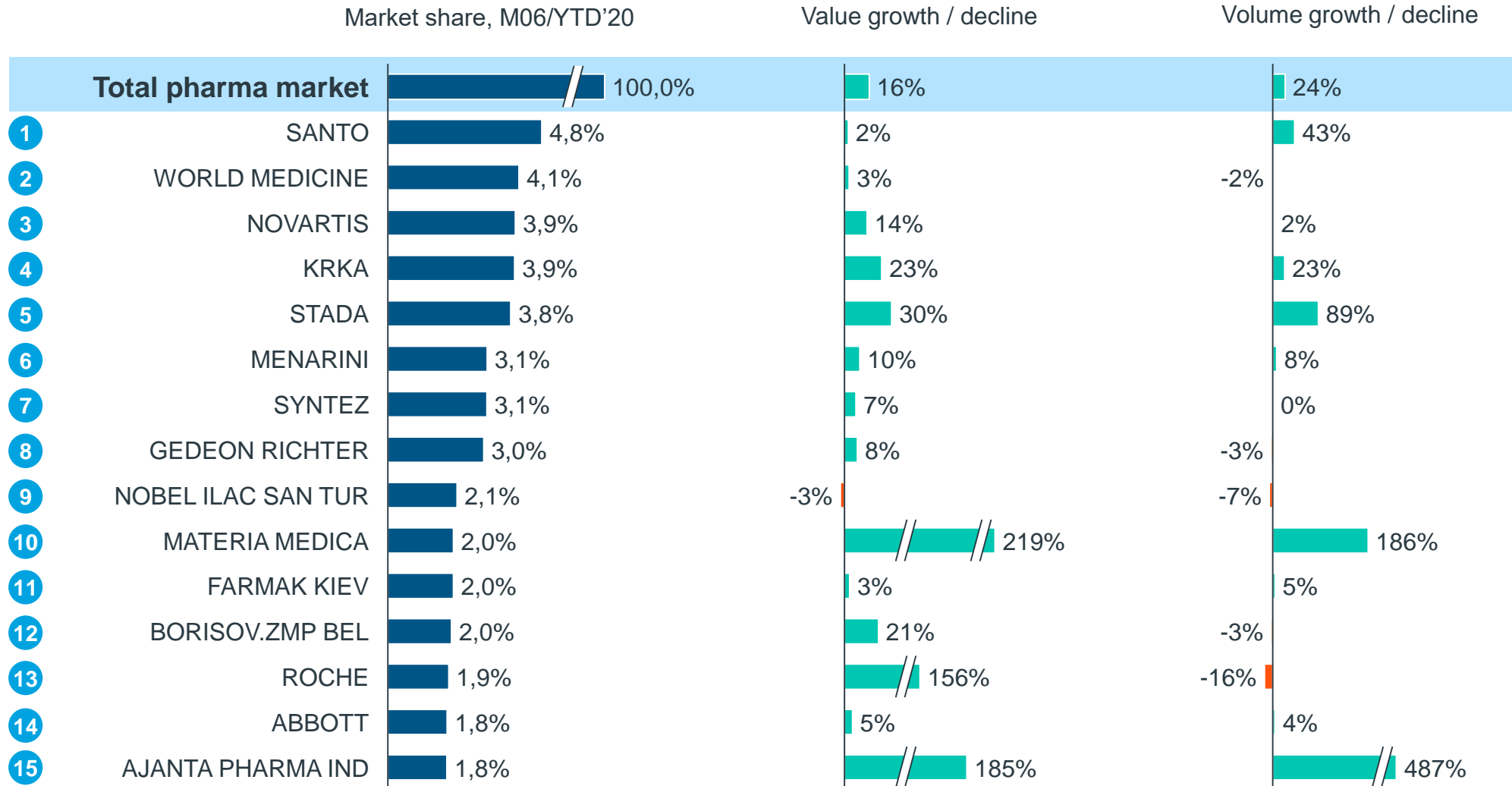


Indicator	KGS	USD	EUR	PACKS
Value M06/YTD'20, Bln.	6,1	0,08	0,07	0,08
Growth M06/YTD'20%	▲ 16%	▲ 10%	▲ 13%	▲ 24%



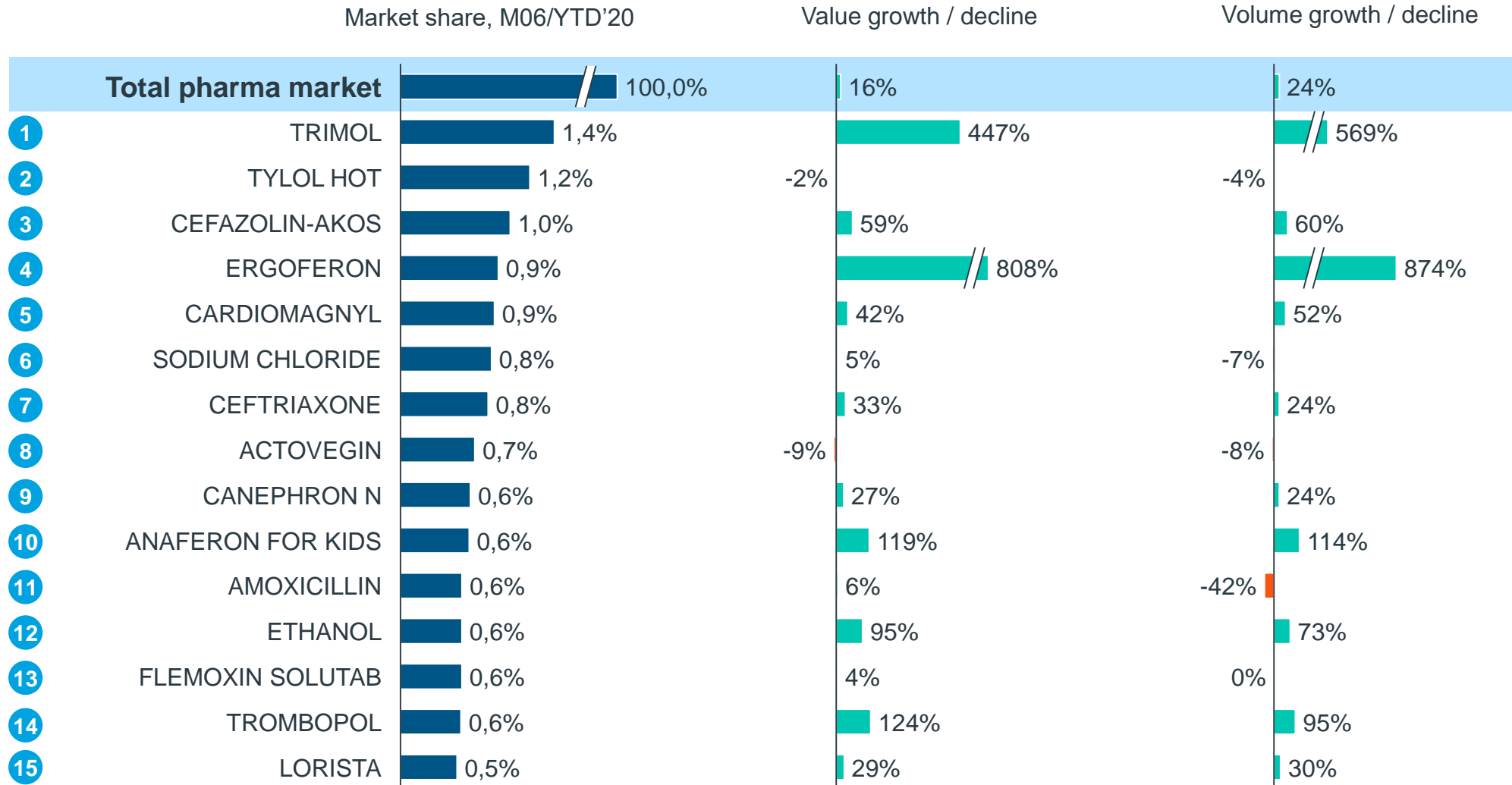


# TOP-15 corporations on Kyrgyzstan market, January-June 2020





# TOP-15 brands on Kyrgyzstan market, January-June 2020



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

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