

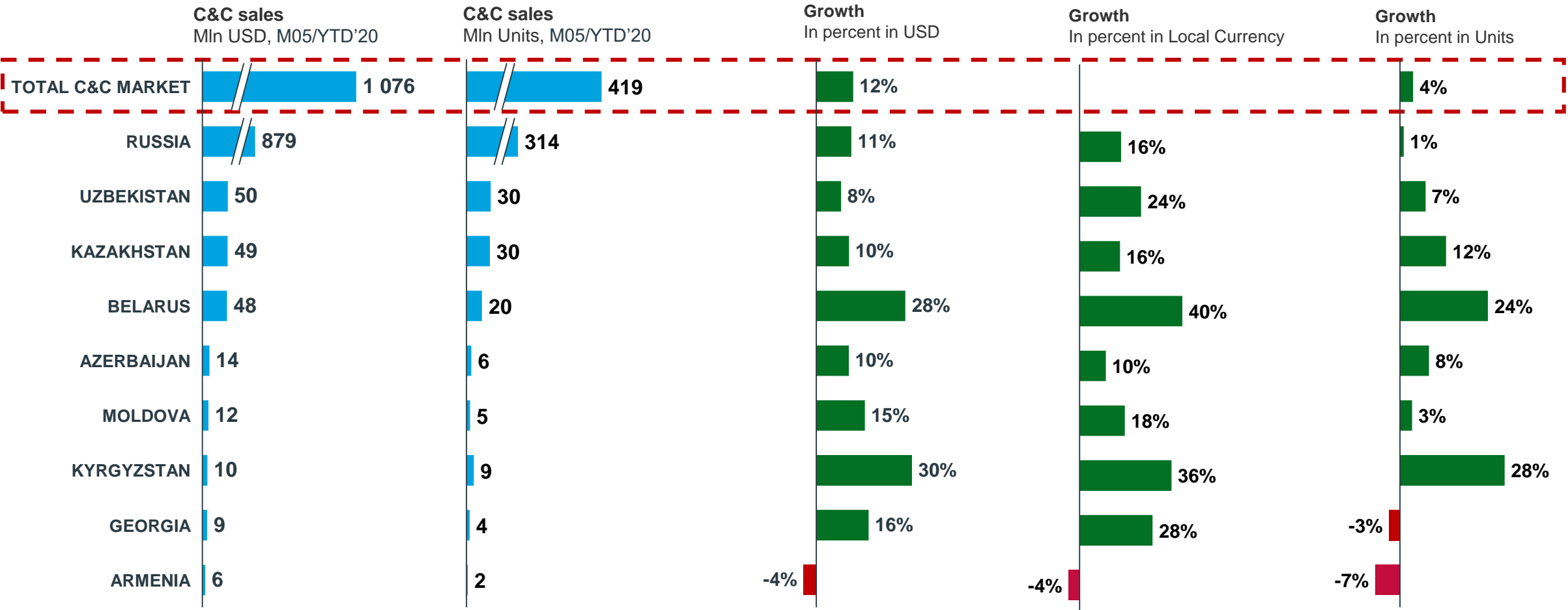


Facts from IQVIA

M05 2020

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

C&C increases by 12% in USD and by 4% in volume

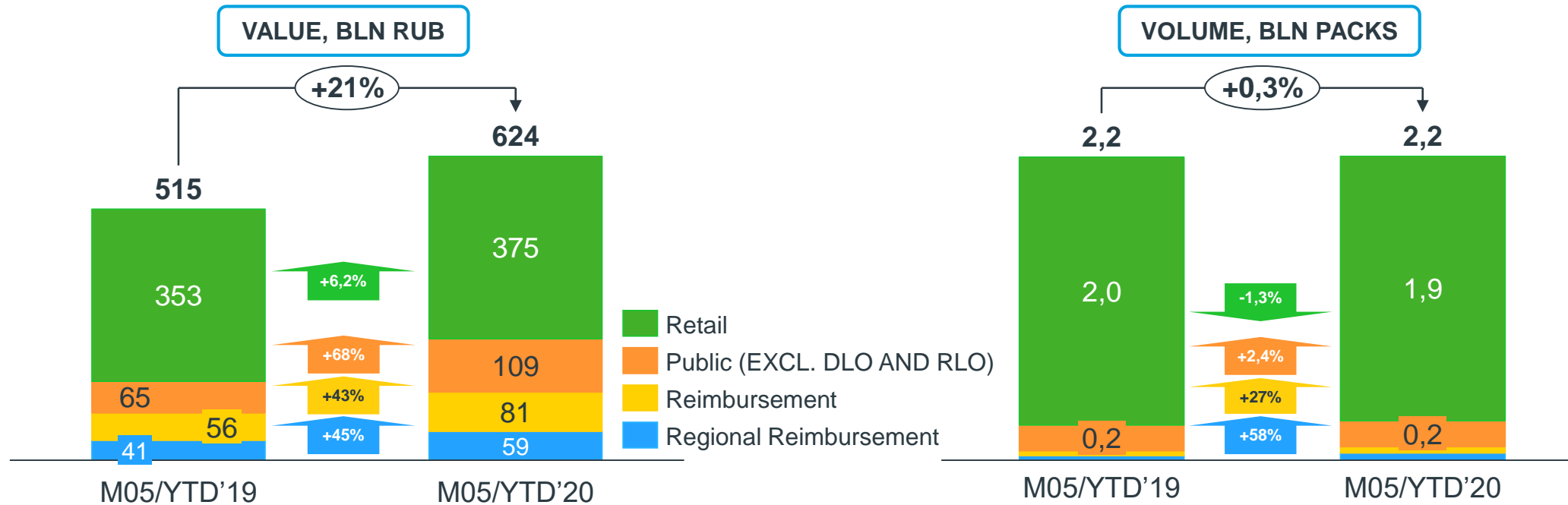


Source: IQVIA databases: Retail (TRD Prices)
Cough&Cold Market: EphMRA3: J05B,L03A,L03B,R01A,R02A,R05A,R05C,R05D



Russian pharma market growth in January-May 2020

Market grew by 21% in value and by 0,3% in volume

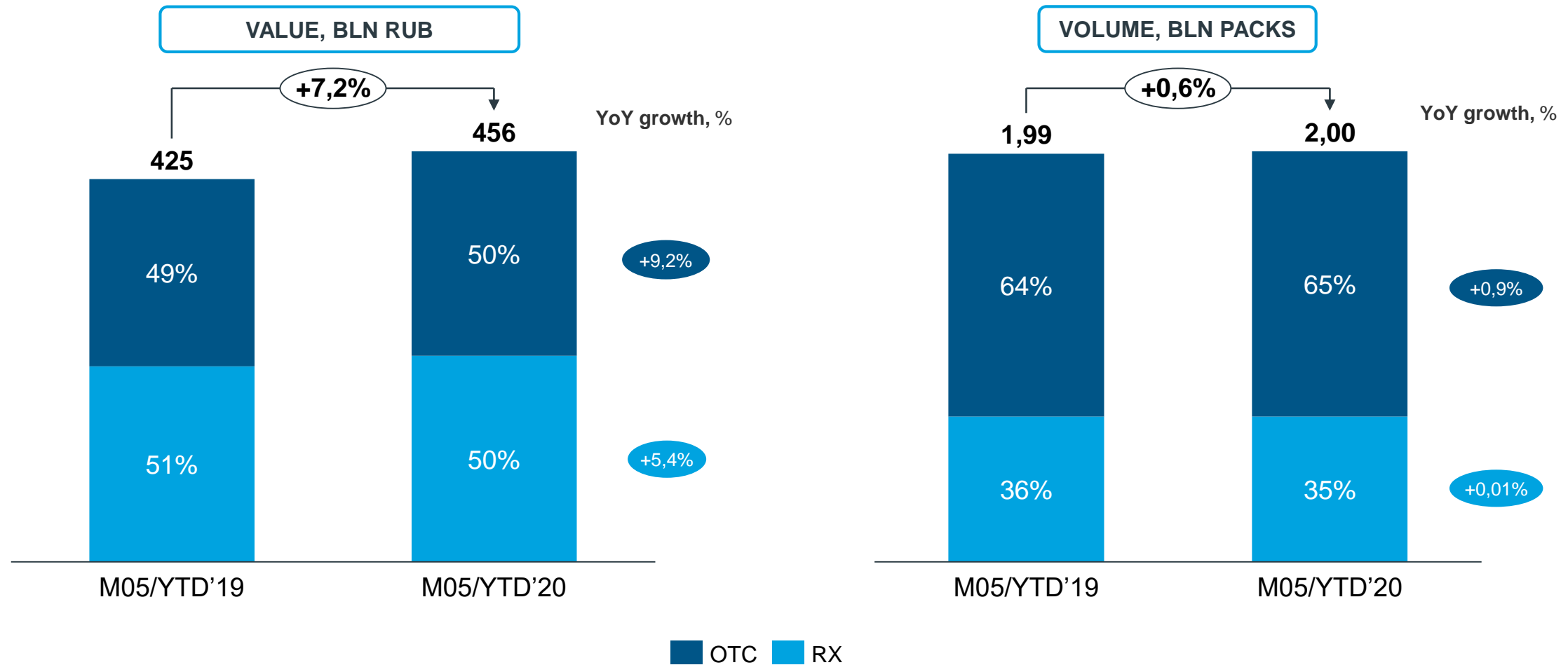


Indicator	RUB	USD	EUR	PACKS
Value M05/YTD'20, Bln.	624	9,0	8,2	2,2
Growth M05/YTD'20%	▲ 21%	▲ 14%	▲ 18%	▲ 0,3%



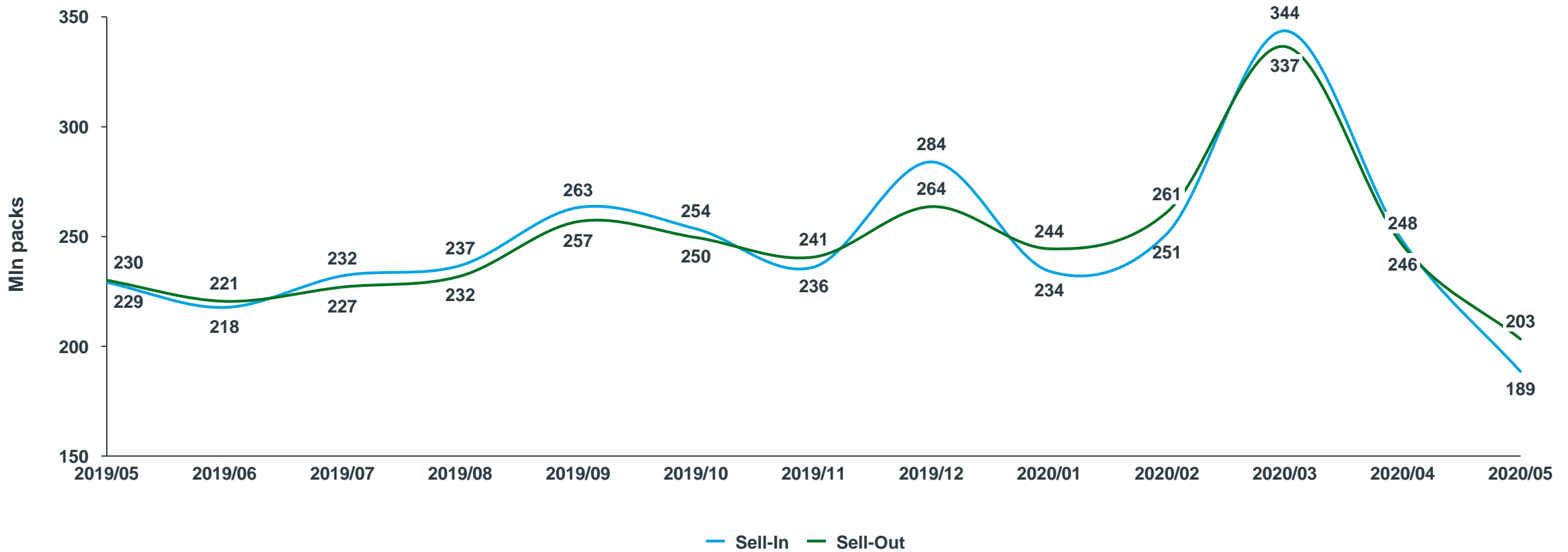
Russian pharma market growth in January-May 2020

Retail Sell-Out: Market grew by 7,2% in value and by 0,6% in volume





Sell-In vs Sell-Out, OTC registered drugs





E-Com market dynamics



86.6 bln RUB

E-Com sales in 2019

+92% vs 2018



1 670 rub

Average purchase



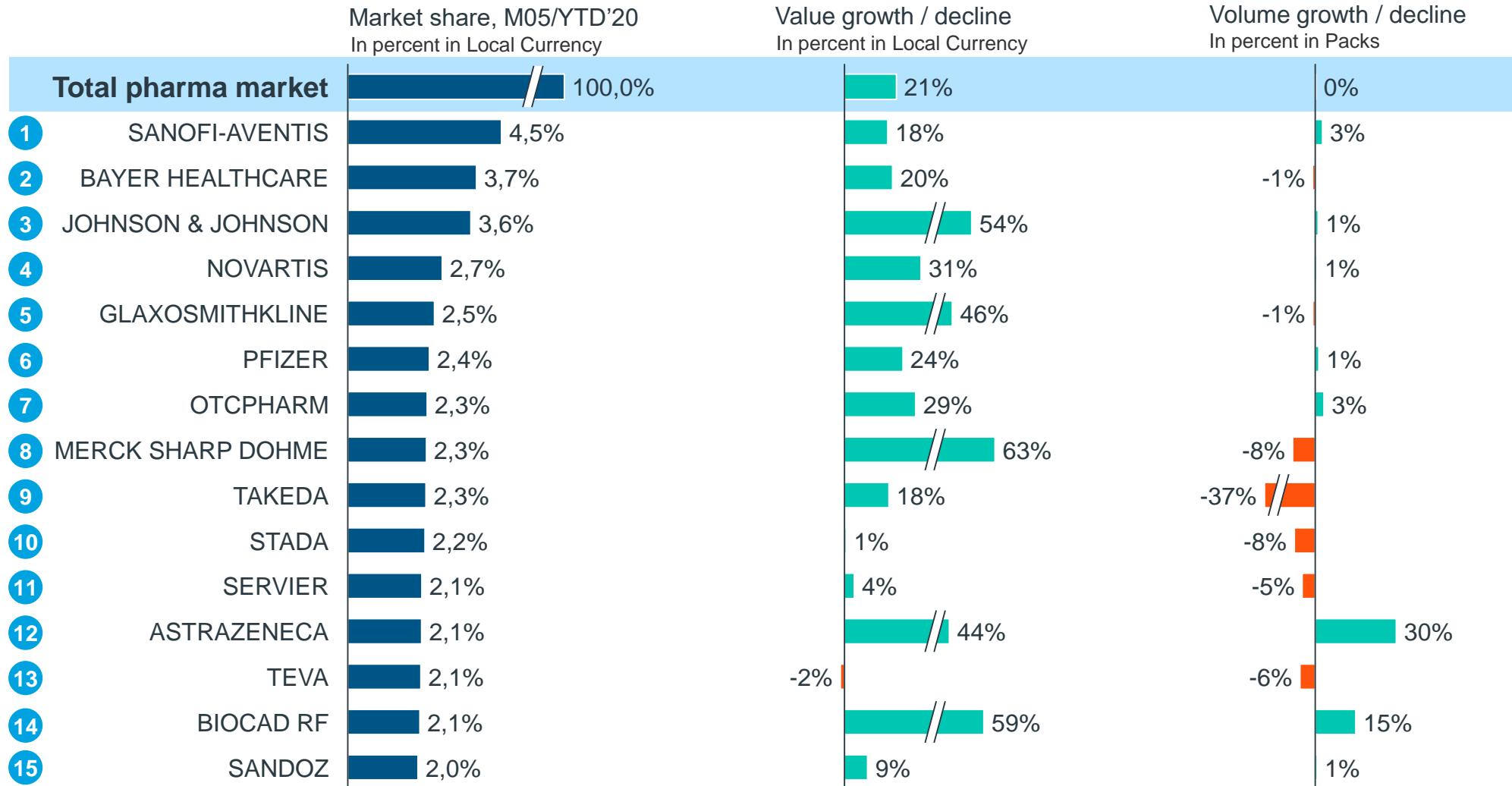
51.6 mln

E-Com purchases

+98% vs 2018



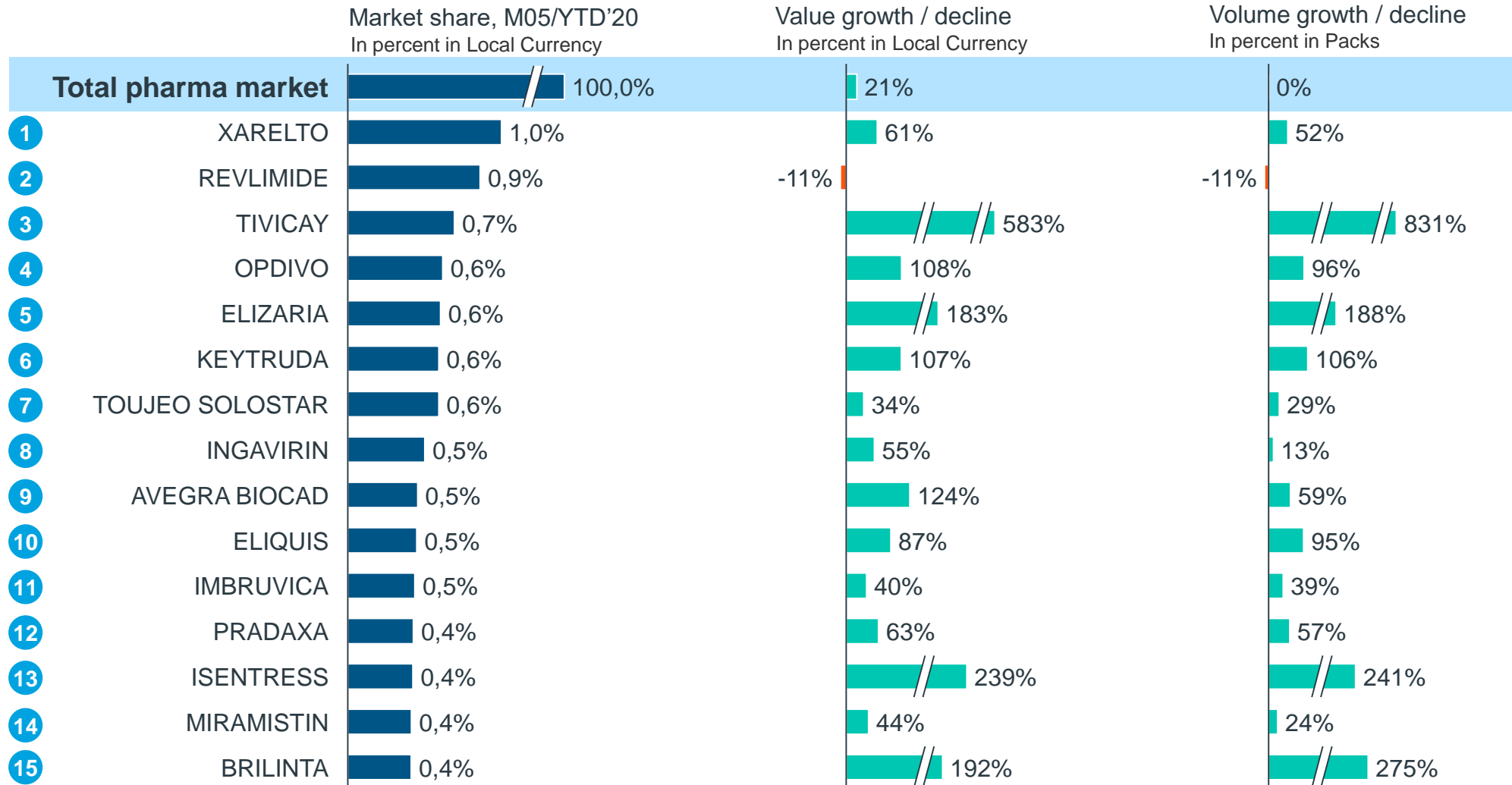
TOP-15 corporations on Russian market, January-May 2020



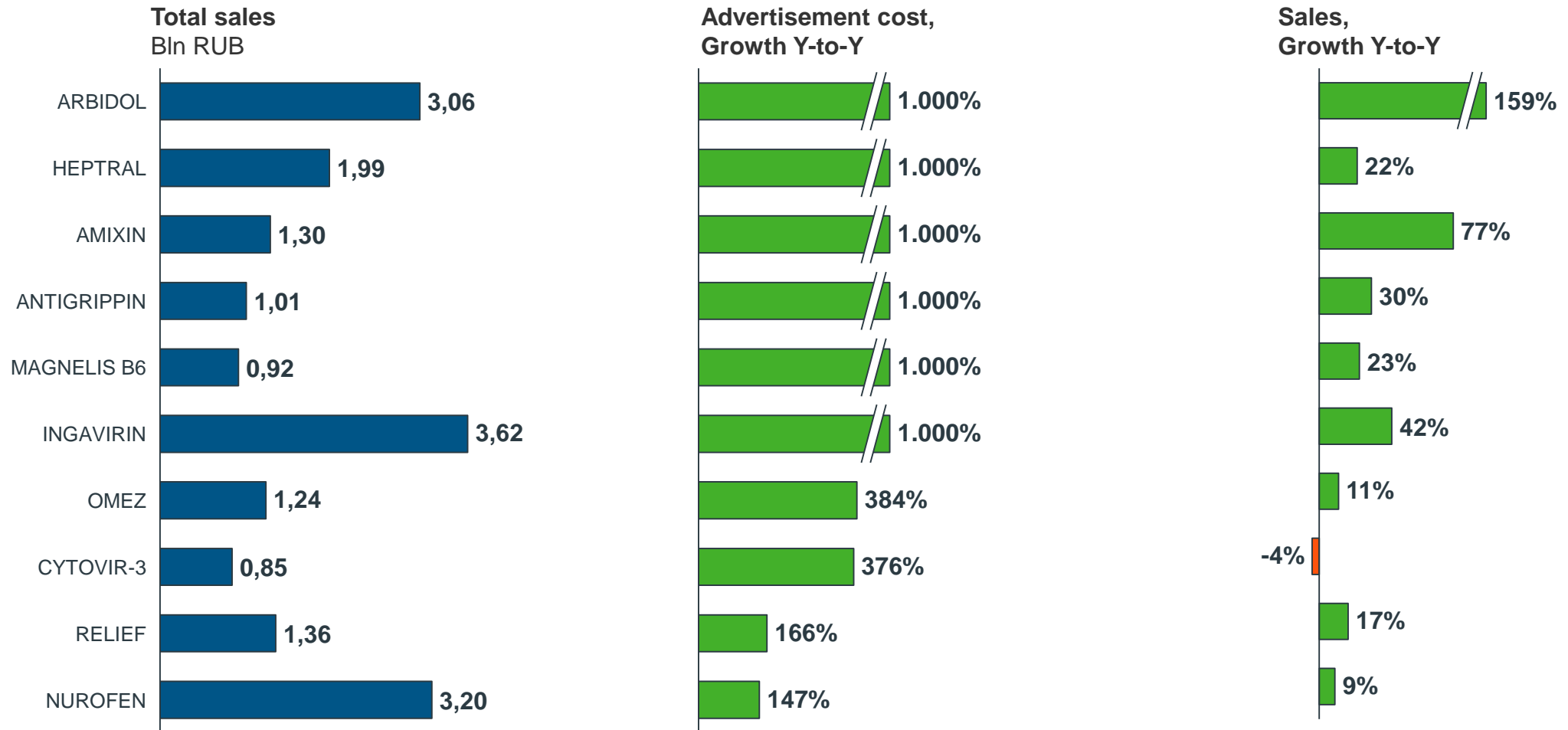
Source: IQVIA databases. Retail, Public, DLO, RLO (excluding food supplements and diagnostic agents), TRD Prices



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

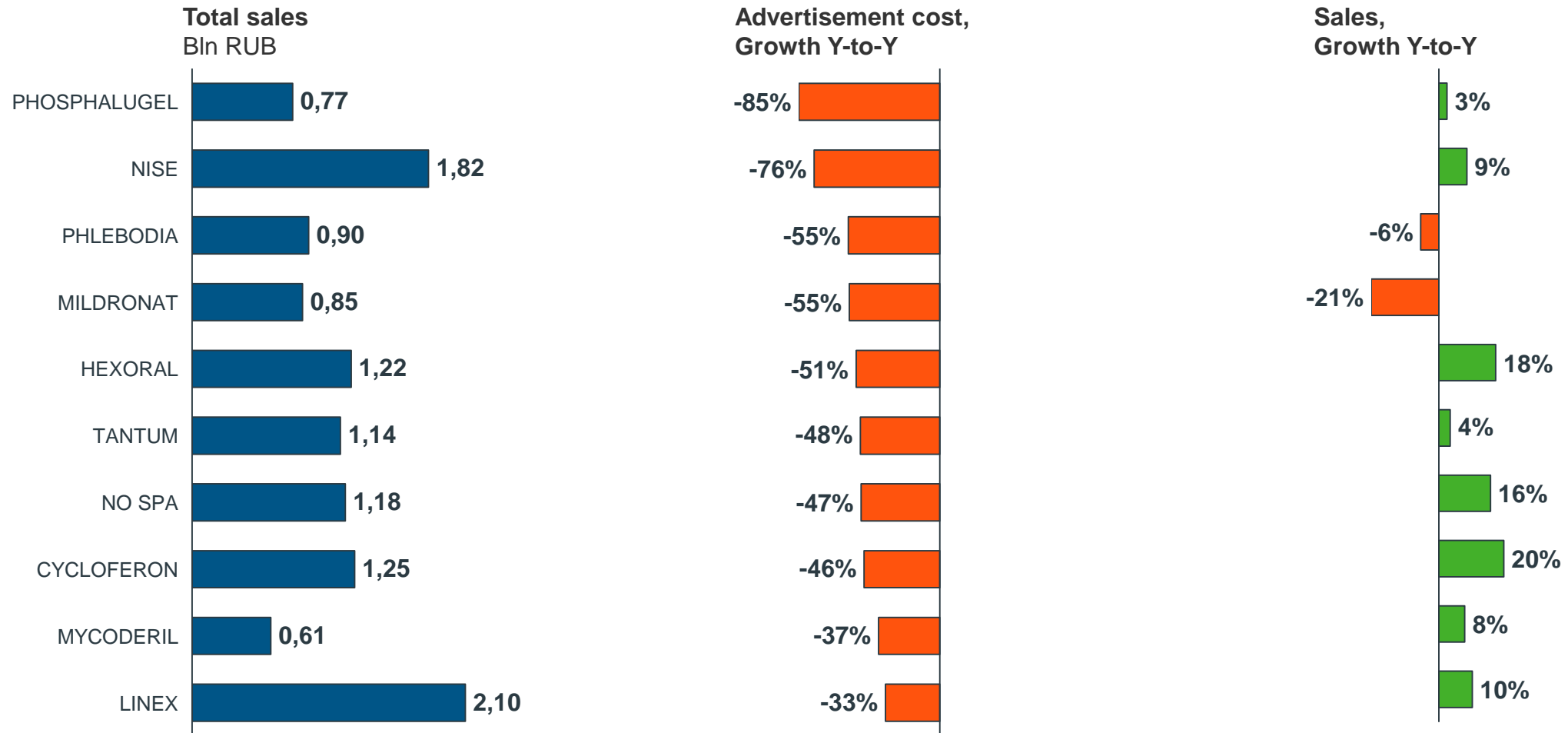


TOP-10 products by growth in advertisement investments in January-May 2020



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-May 2020

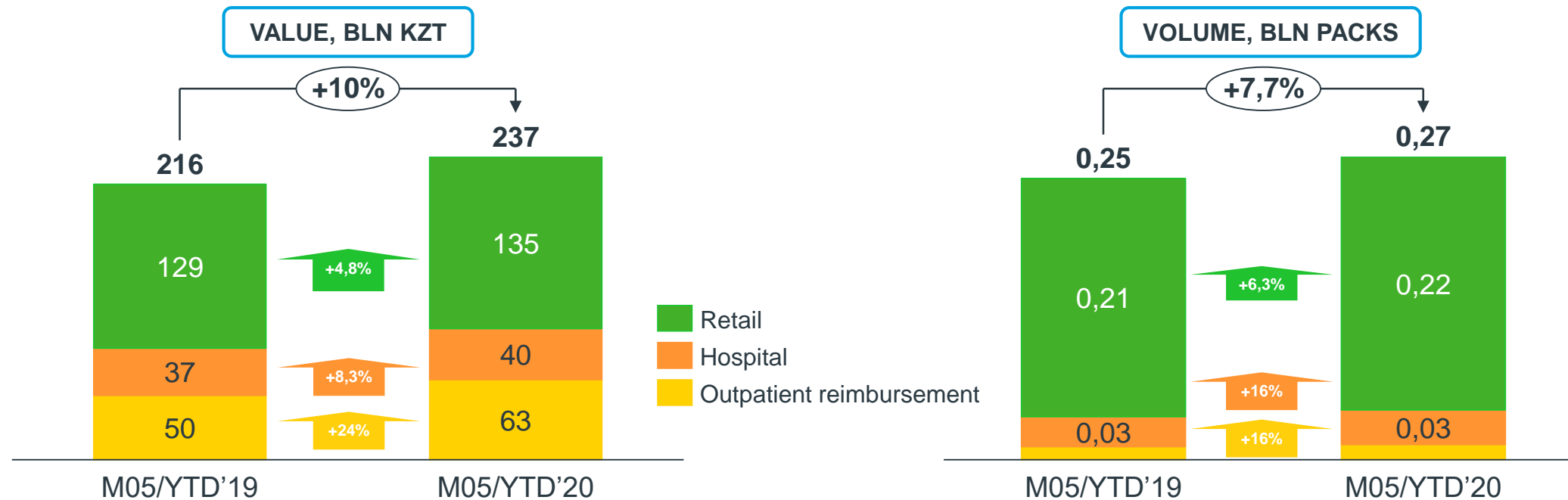


The rank is calculated among TOP-200 Brands by sales with advertising cost greater than 50 mln RUB
 Source: IQVIA databases. Pharmatrend, Mediascope data, FIN Prices



Kazakhstan pharma market growth in January-May 2020

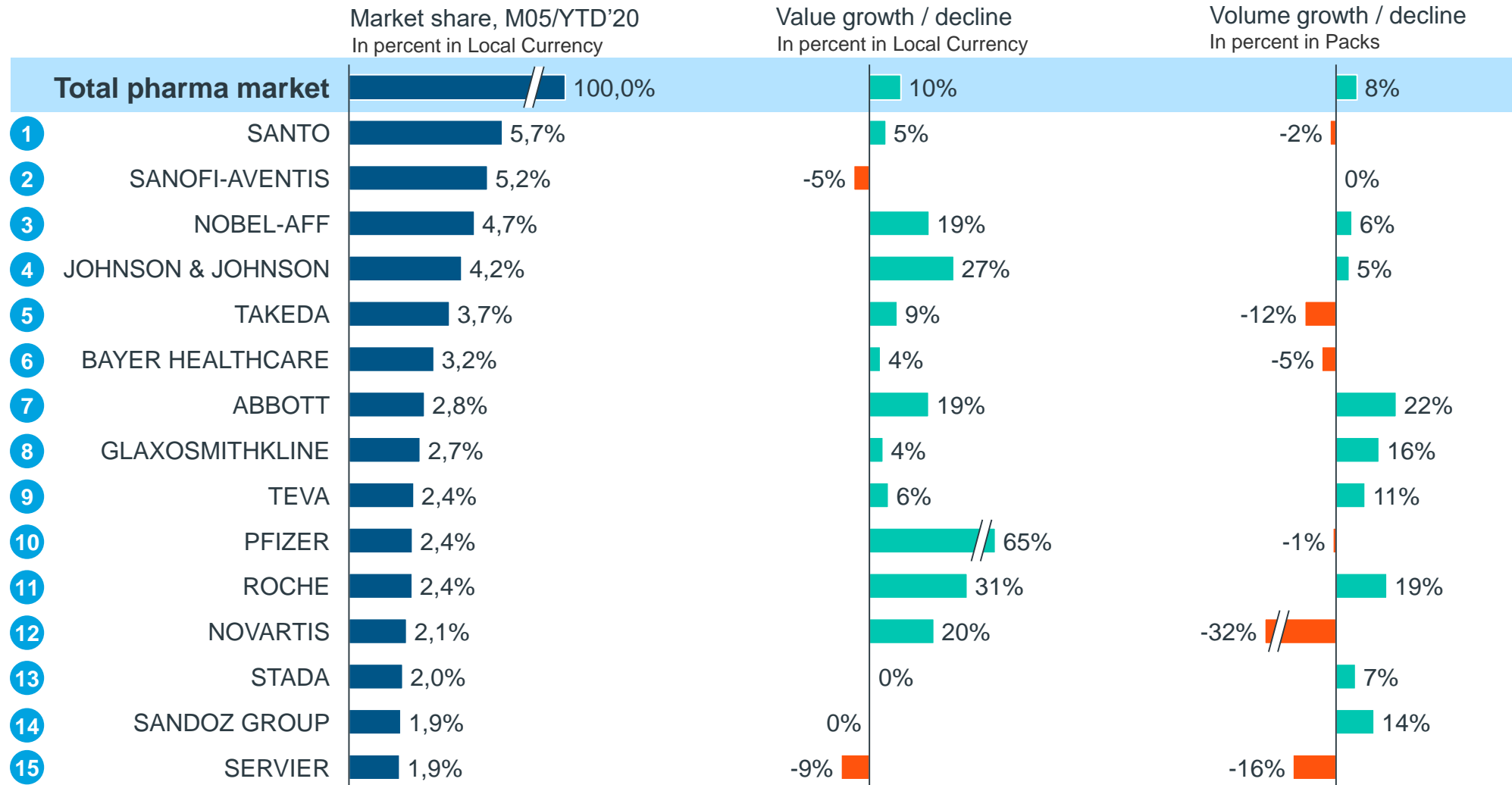
Market grew by 10% in value and by 7,7% in volume



Indicator	KZT	USD	EUR	PACKS
Value M05/YTD'20, Bln.	237	0,59	0,54	0,27
Growth M05/YTD'20%	▲ 10%	▲ 3,2%	▲ 6,3%	▲ 7,7%



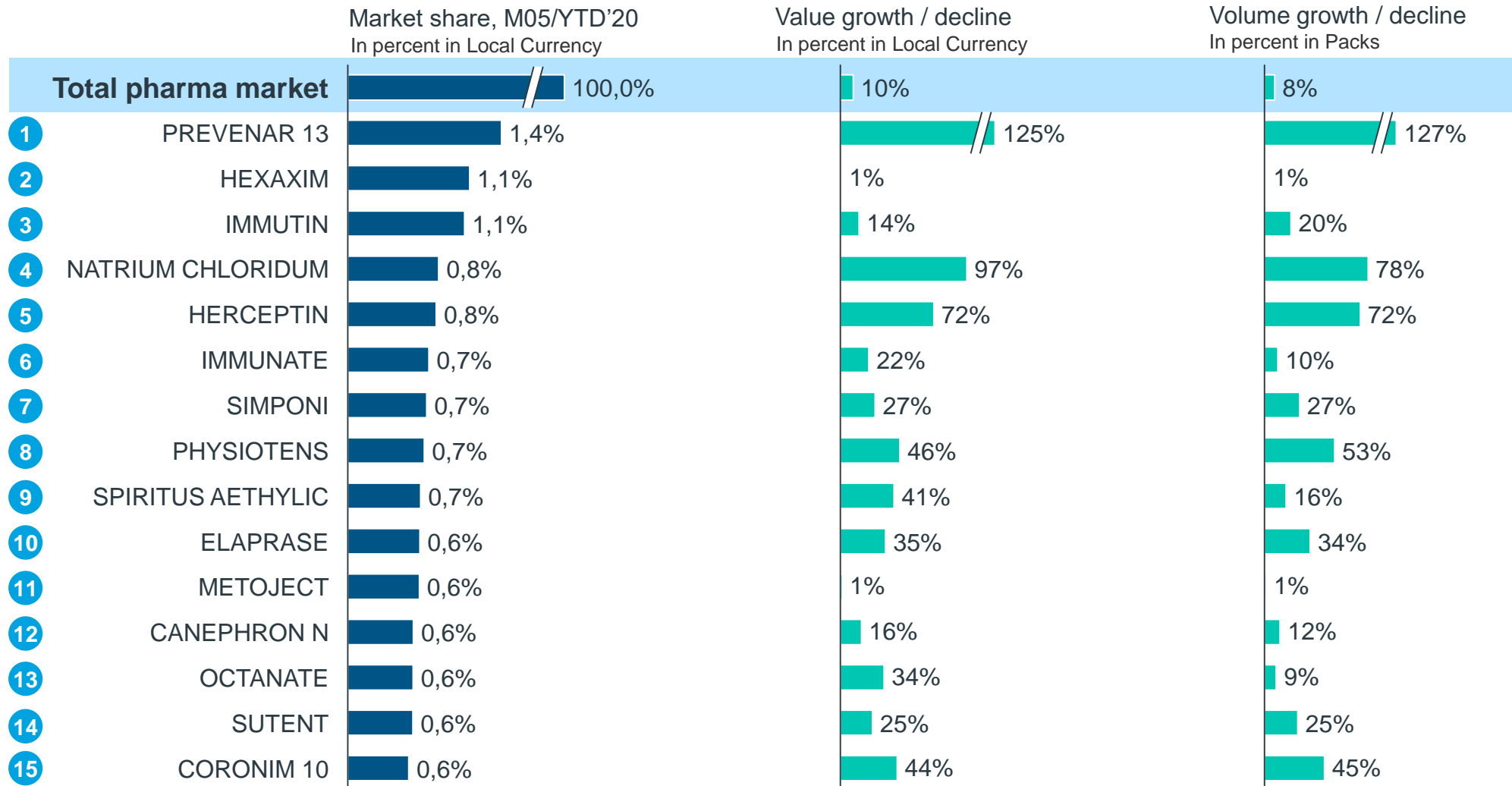
TOP-15 corporations on Kazakhstan market, January-May 2020



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



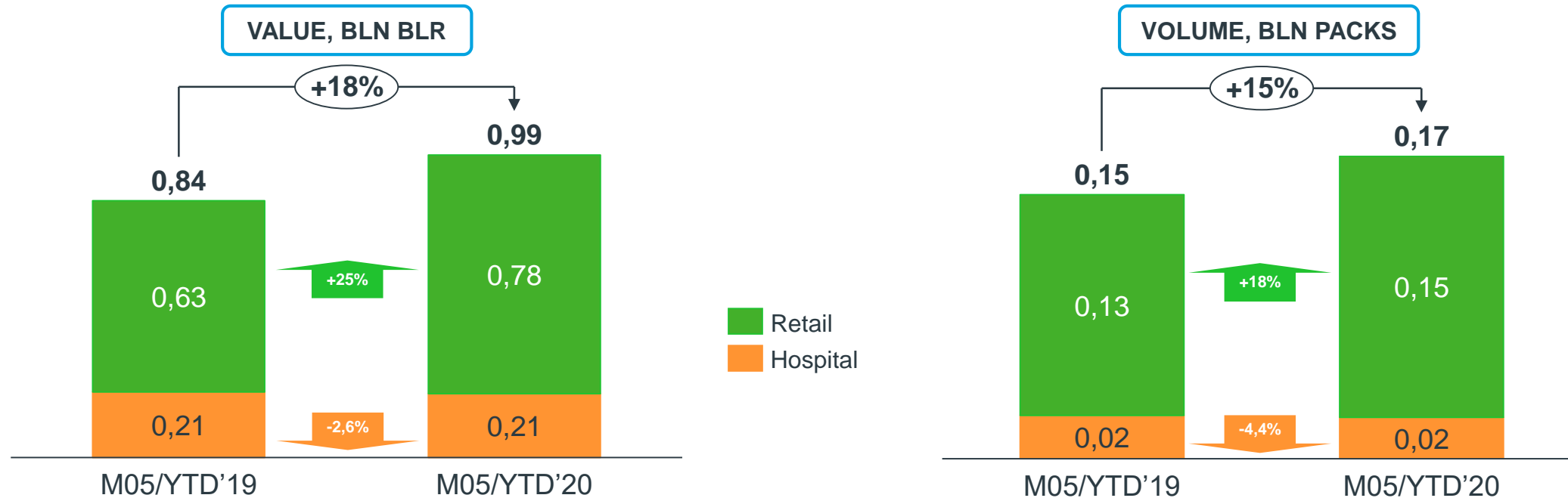
TOP-15 brands on Kazakhstan market, January-May 2020





Belarus pharma market growth in January-May 2020

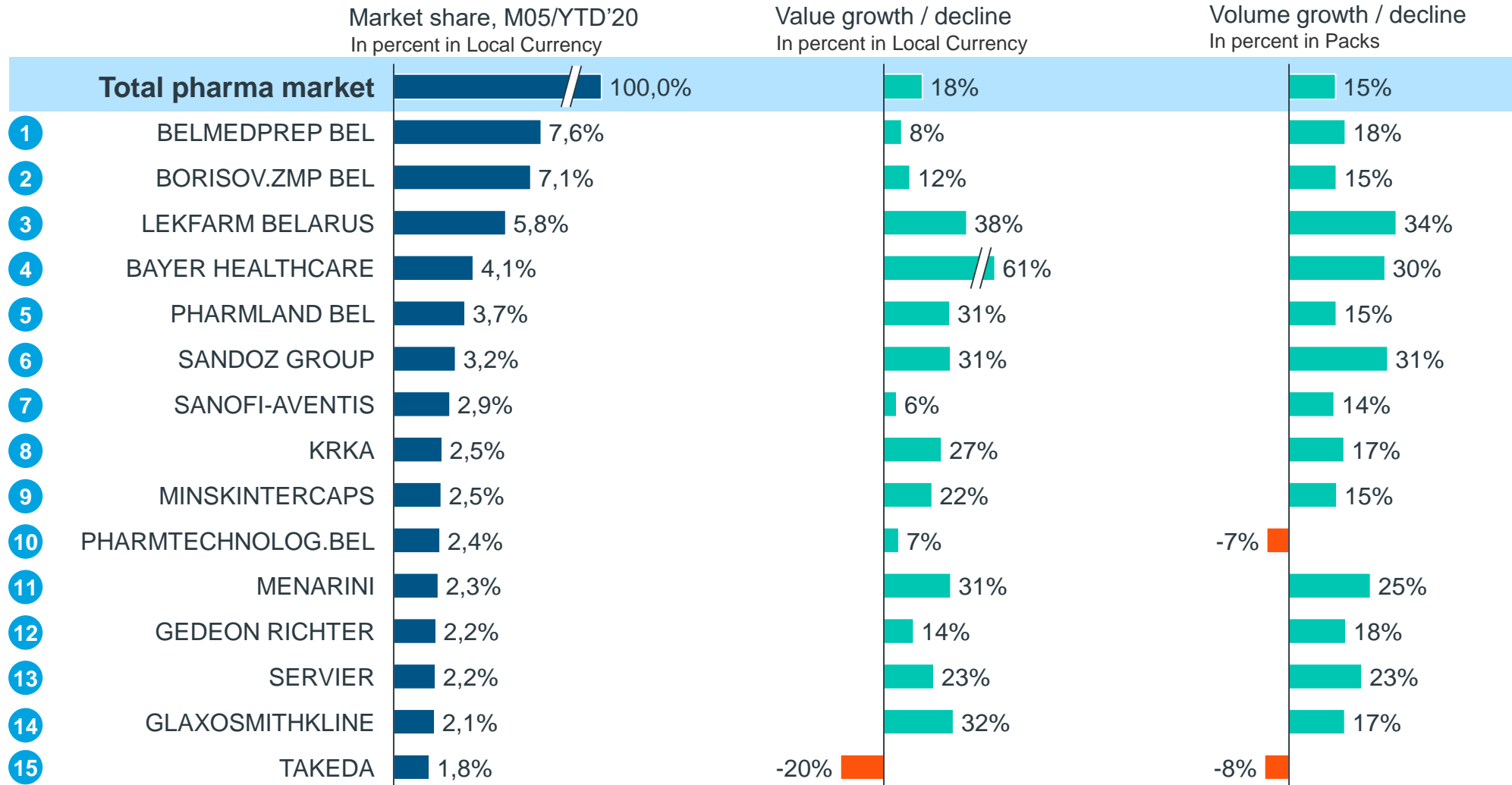
Market grew by 18% in value and by 15% in volume



Indicator	BLR	USD	EUR	PACKS
Value M05/YTD'20, Bln.	0,99	0,43	0,39	0,17
Growth M05/YTD'20%	▲ 18%	▲ 7,7%	▲ 11%	▲ 15%



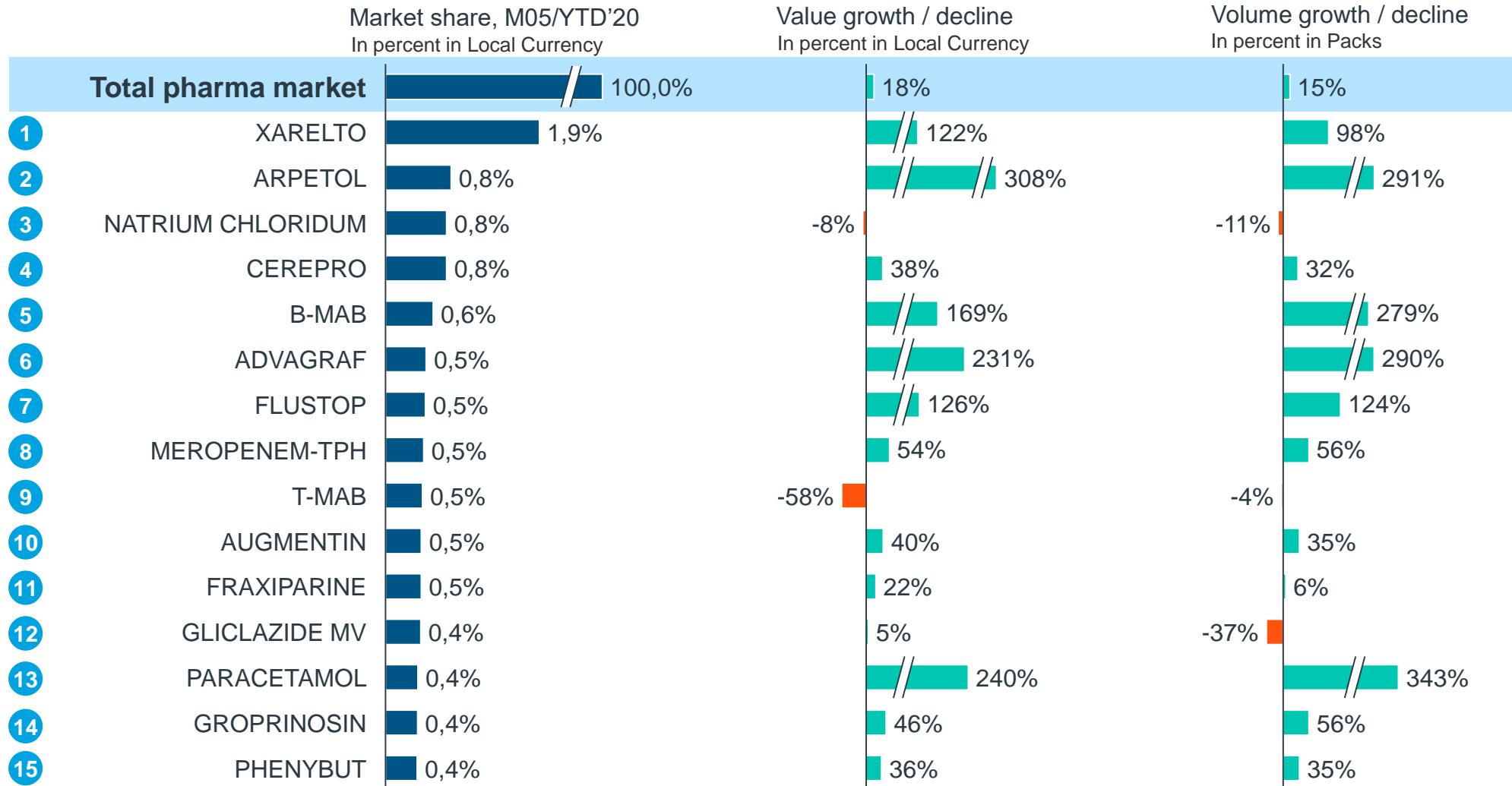
TOP-15 corporations on Belarus market, January-May 2020



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



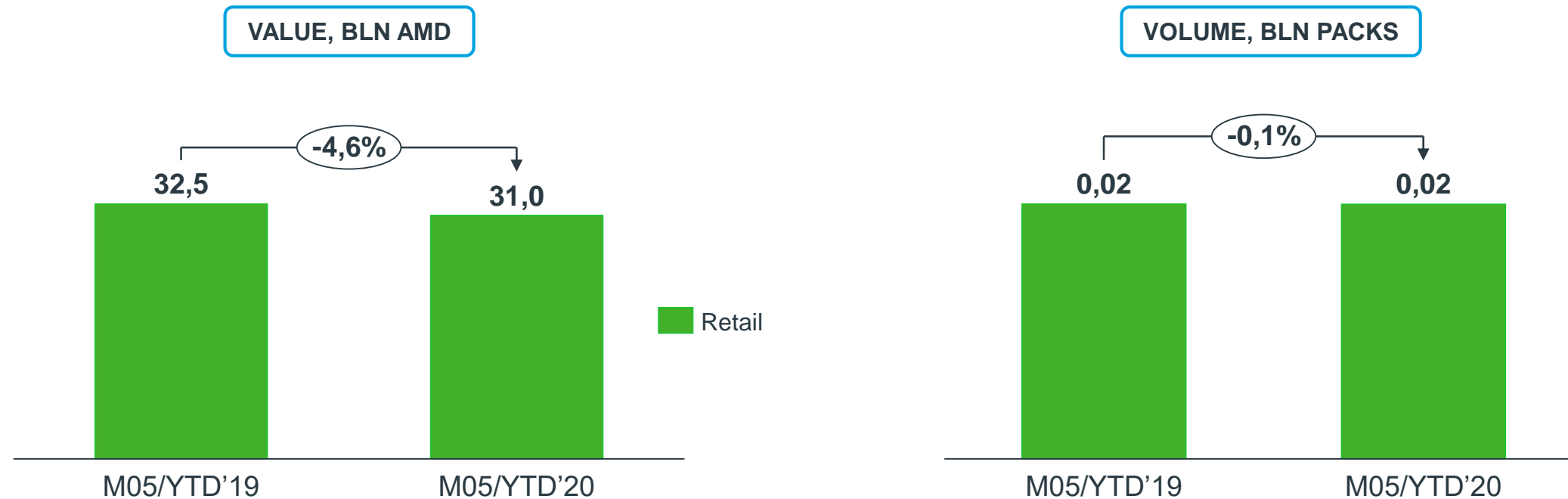
TOP-15 brands on Belarus market, January-May 2020





Armenia pharma market growth in January-May 2020

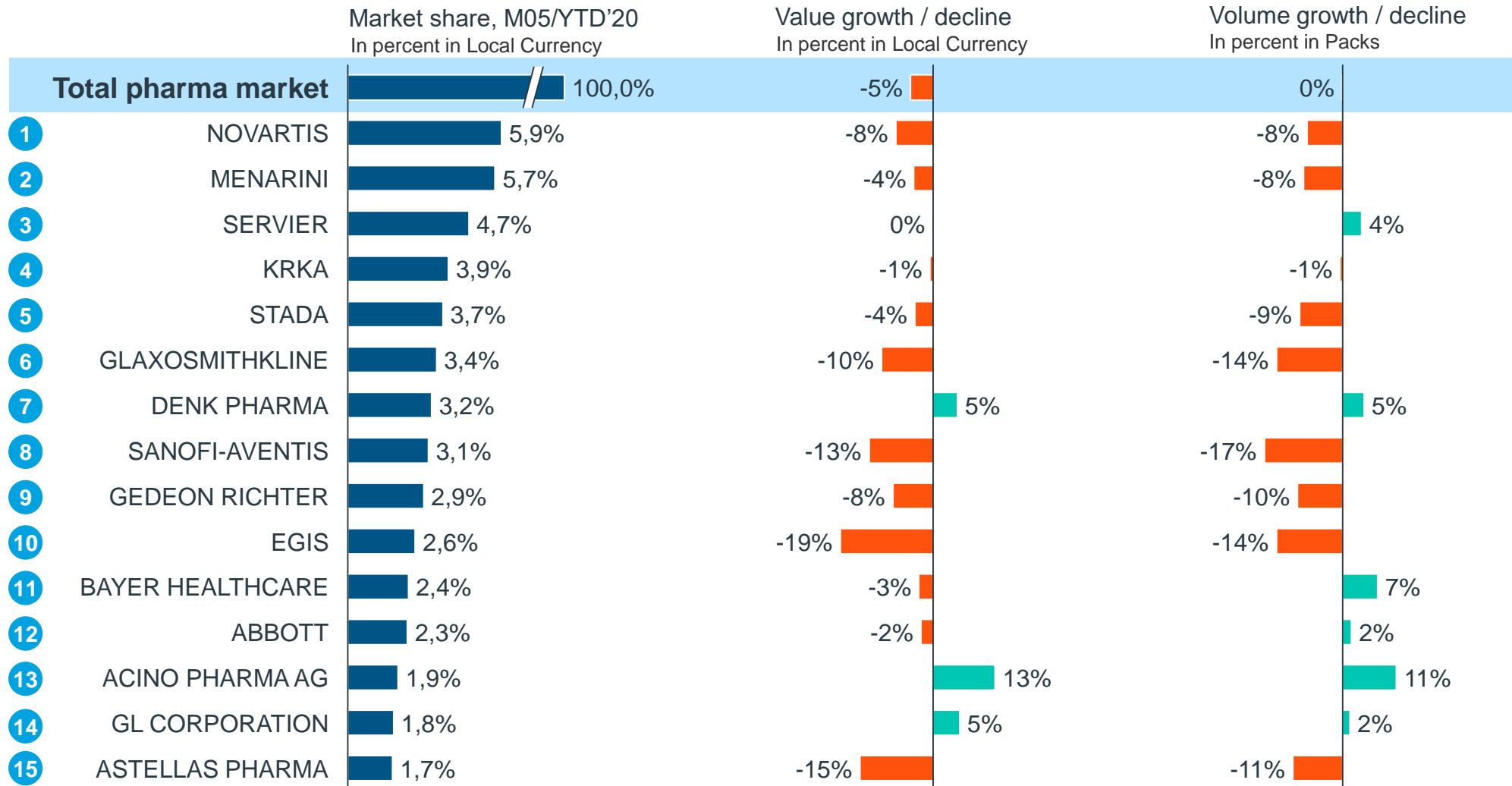
Market decreased by 4,6% in value and by 0,1% in volume



Indicator	AMD	USD	EUR	PACKS
Value M05/YTD'20, Bln.	31,0	0,1	0,1	0,02
Growth M05/YTD'20%	▼ -4,6%	▼ -4,3%	▼ -1,4%	▼ -0,1%

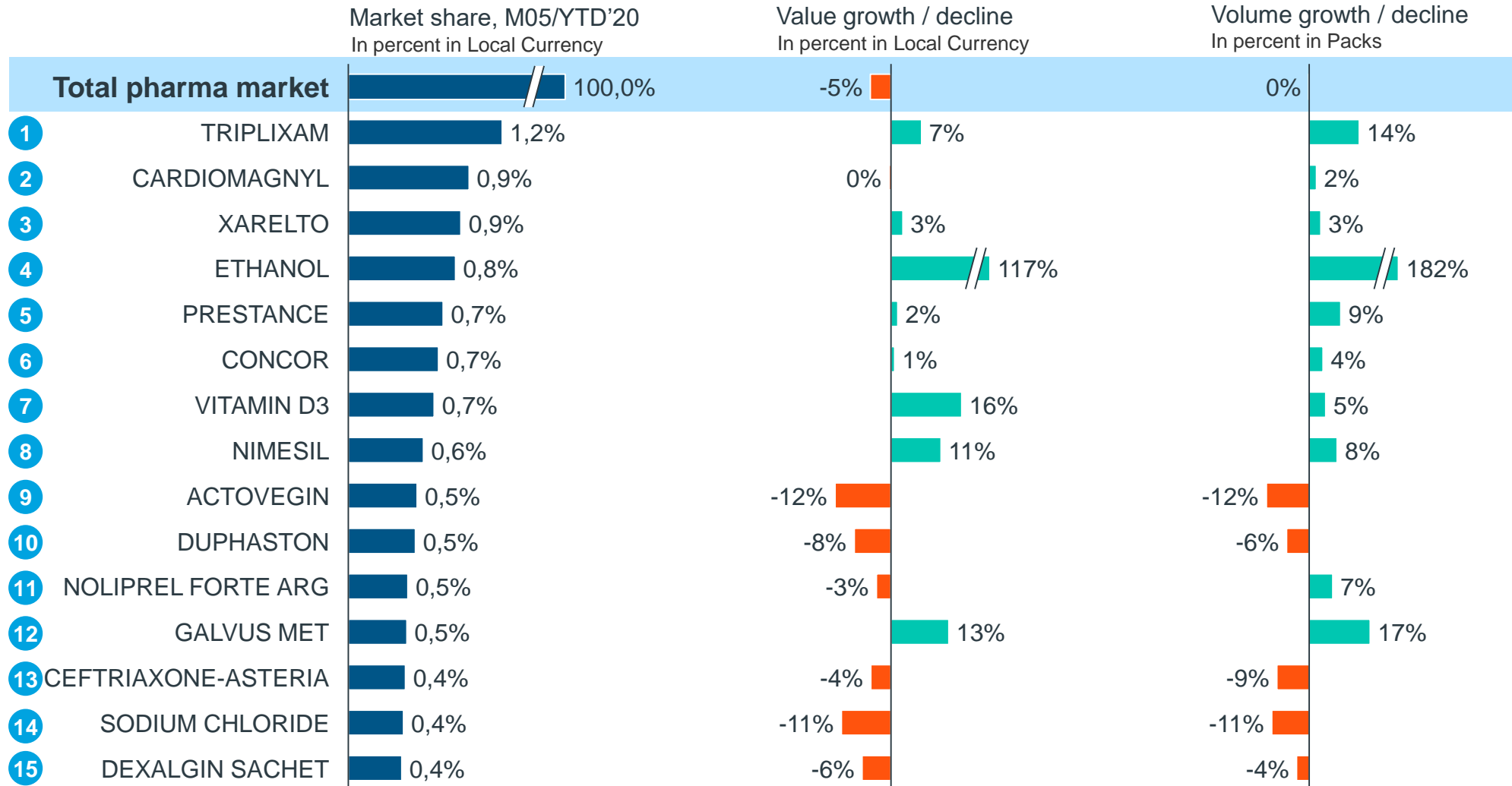


TOP-15 corporations on Armenia market, January-May 2020





TOP-15 brands on Armenia market, January-May 2020

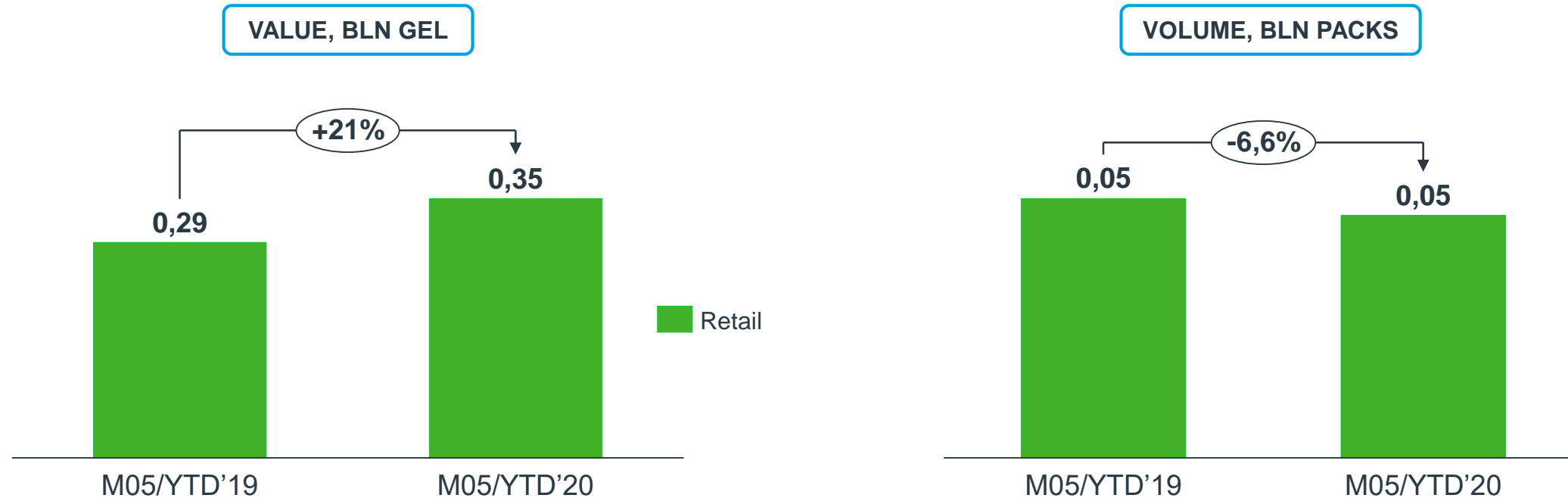


Source: IQVIA databases. Retail Market (exclude food supplements and diagnostic agents), TRD Prices



Georgia pharma market growth in January-May 2020

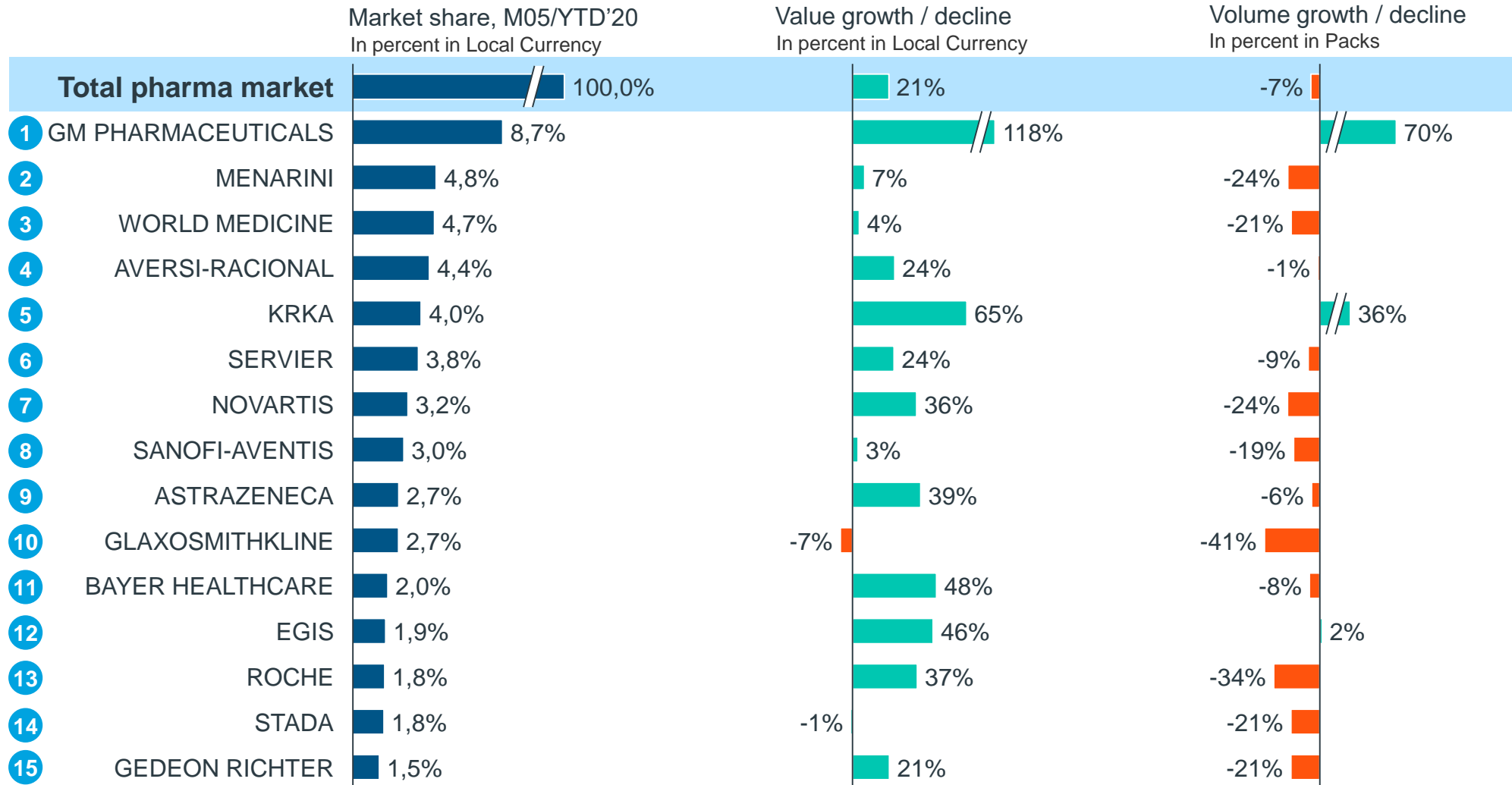
Market grew by 21% in value and decreased by 6,6% in volume



Indicator	GEL	USD	EUR	PACKS
Value M05/YTD'20, Bln.	0,3	0,1	0,1	0,05
Growth M05/YTD'20%	▲ 21%	▲ 7,8%	▲ 11%	▼ -6,6%

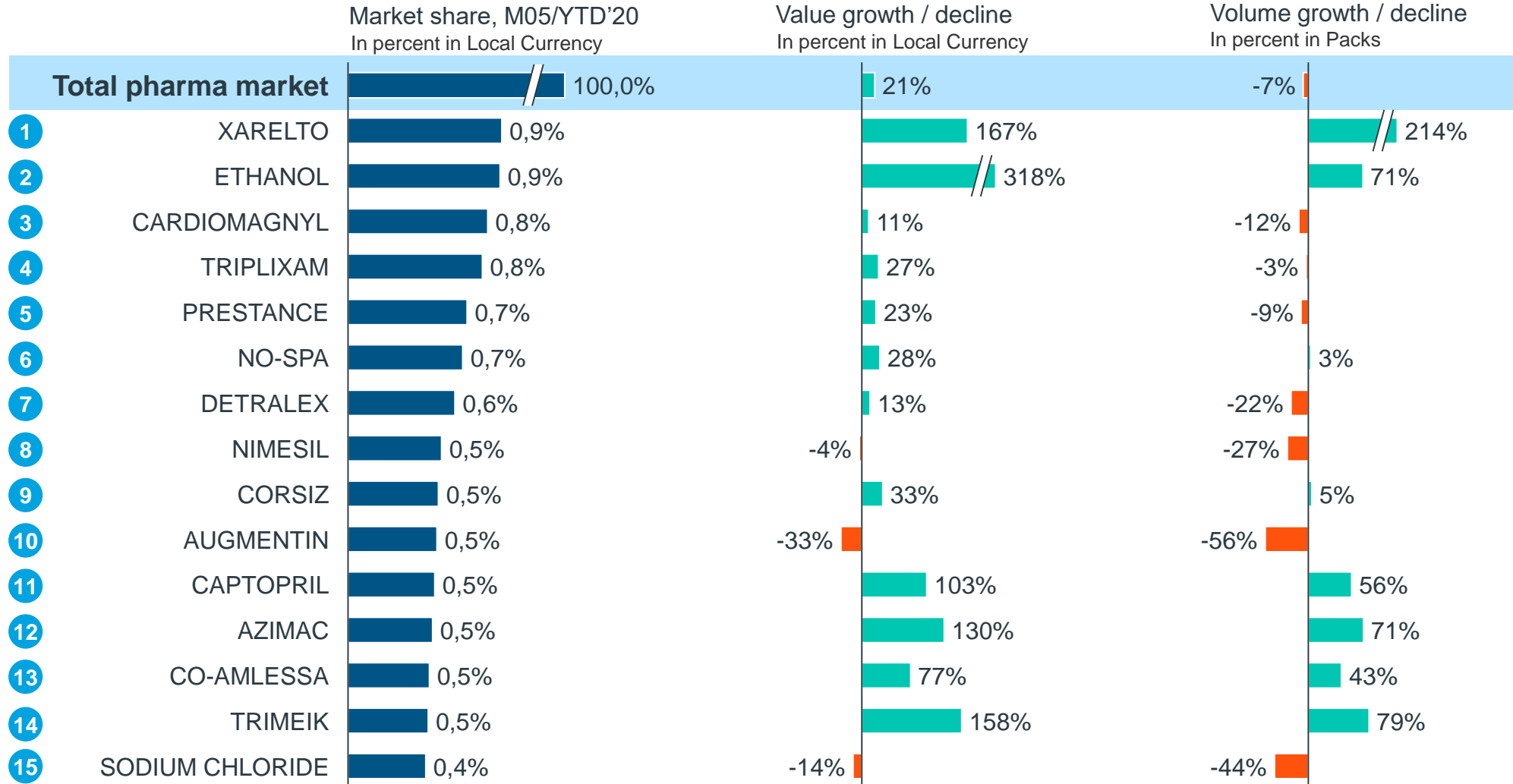


TOP-15 corporations on Georgia market, January-May 2020





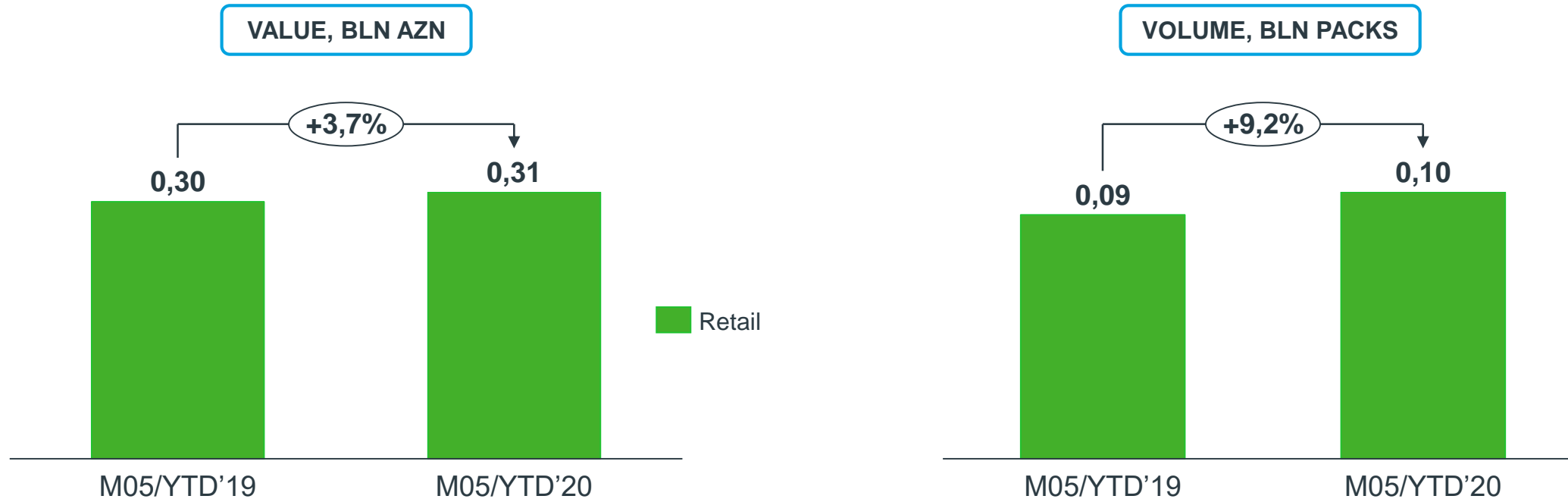
TOP-15 brands on Georgia market, January-May 2020





Azerbaijan pharma market growth in January-May 2020

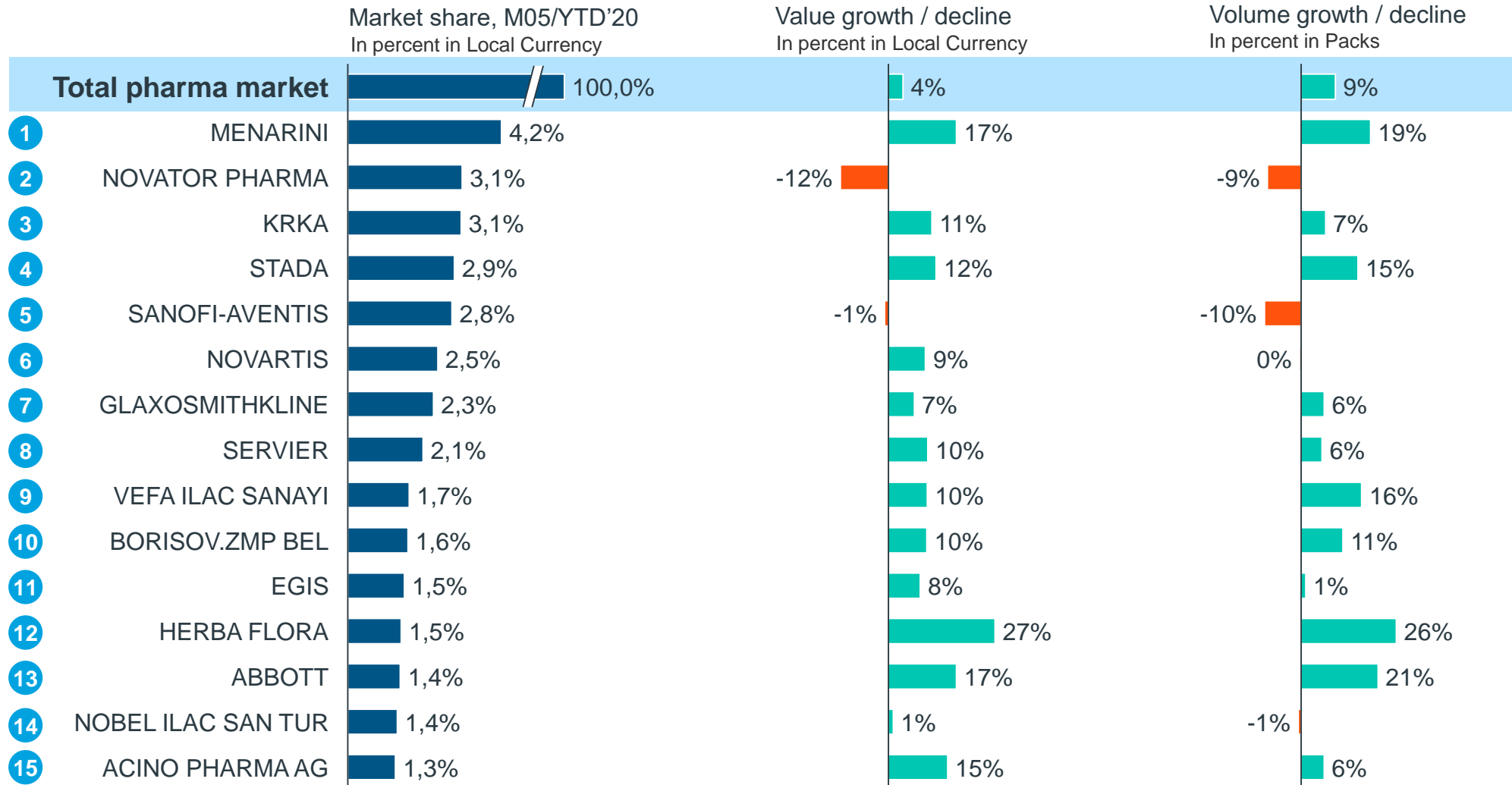
Market grew by 3,7% in value and by 9,2% in volume



Indicator	AZN	USD	EUR	PACKS
Value M05/YTD'20, Bln.	0,3	0,2	0,2	0,10
Growth M05/YTD'20, %	▲ 3,7%	▲ 3,7%	▲ 6,5%	▲ 9,2%

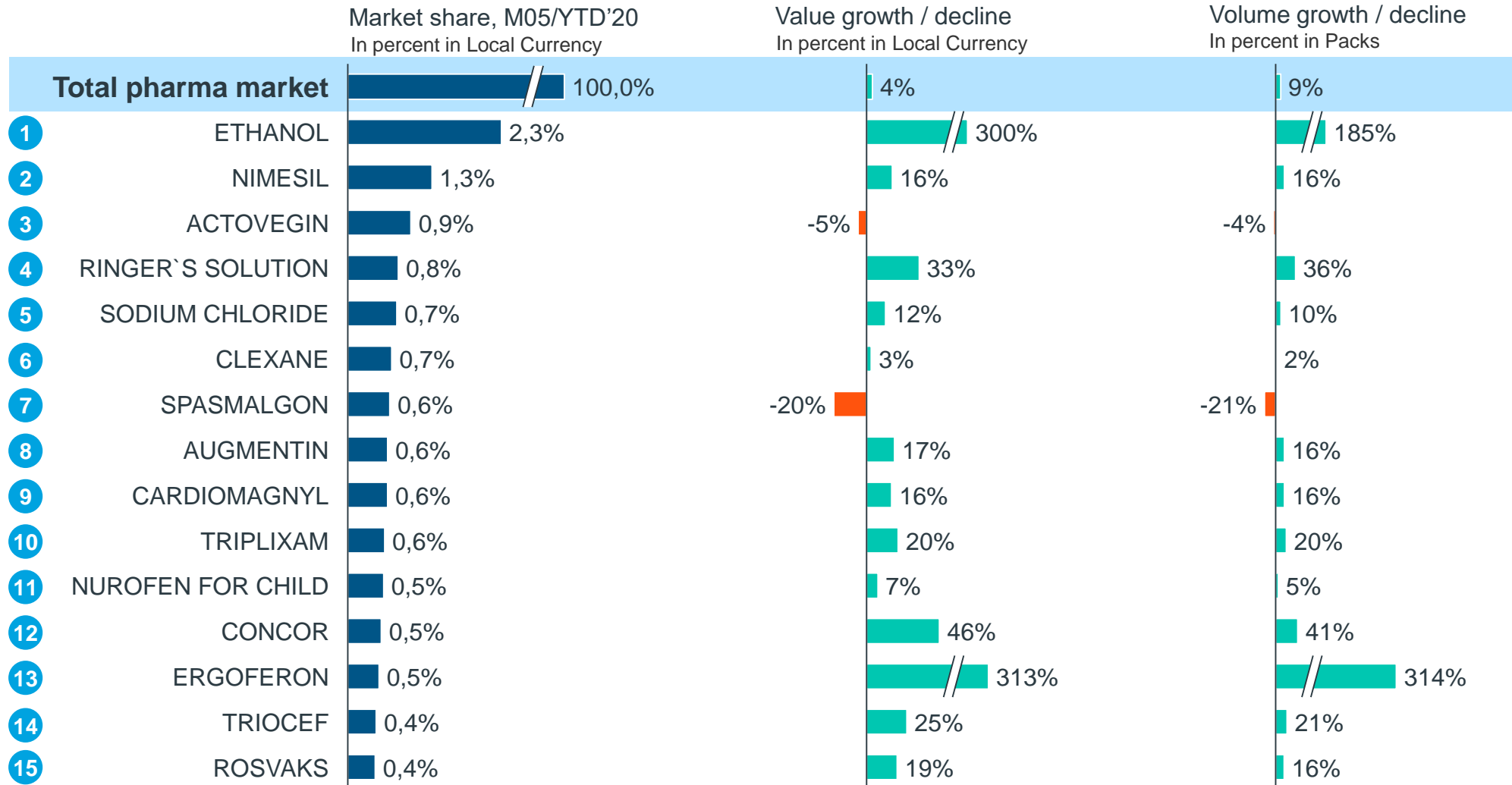


TOP-15 corporations on Azerbaijan market, January-May 2020





TOP-15 brands on Azerbaijan market, January-May 2020



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