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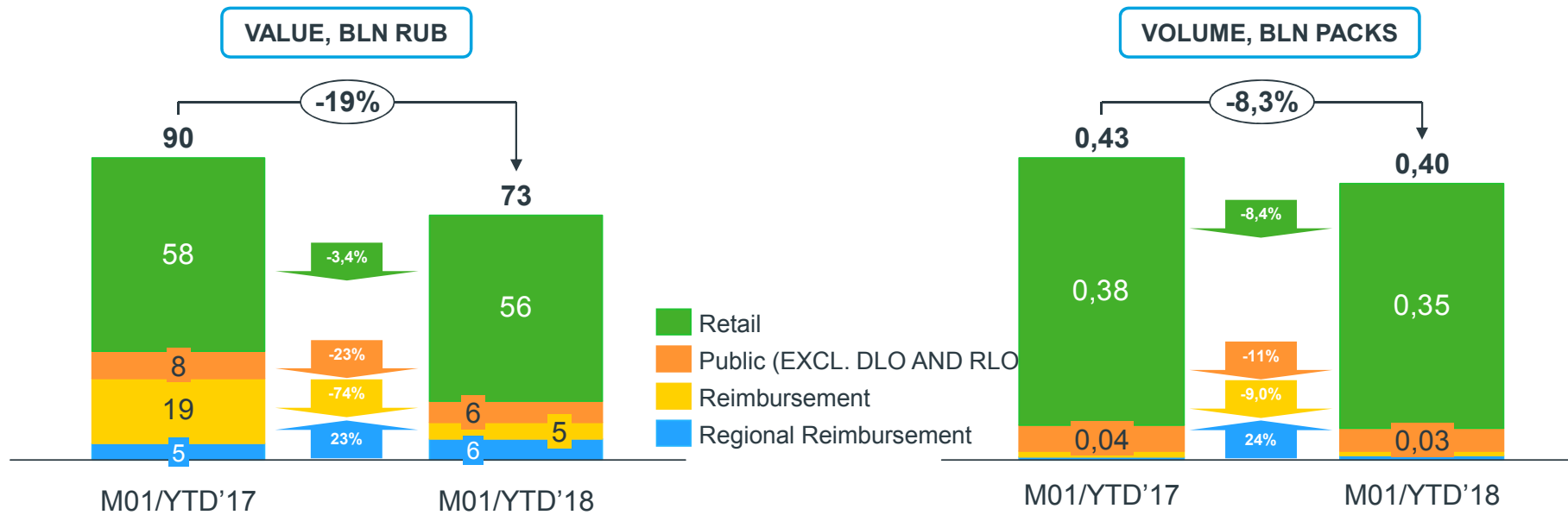
Facts from IQVIA

M01 2018



Russia pharma market growth in January 2018

Market decreases by -19% in value and -8,3% in volume



Indicator	RUB	USD	EUR	PACKS
Value M01/YTD 2018, Bln.	73	1,3	1,1	0,4
Growth M01/YTD,%	▼ -19%	▼ -14%	▼ -25%	▼ -8%

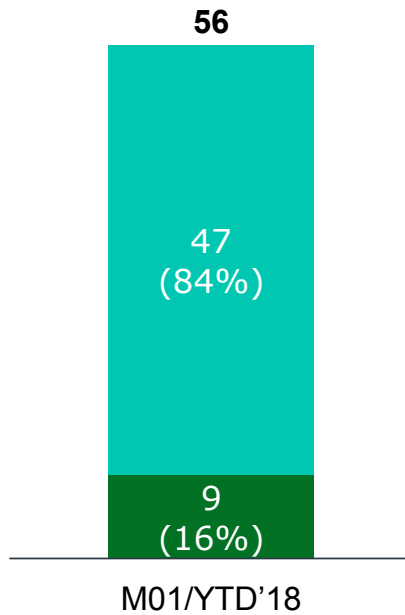
Source: IQVIA databases. Total Market. (exclude food supplements and diagnostic agents), TRD Prices



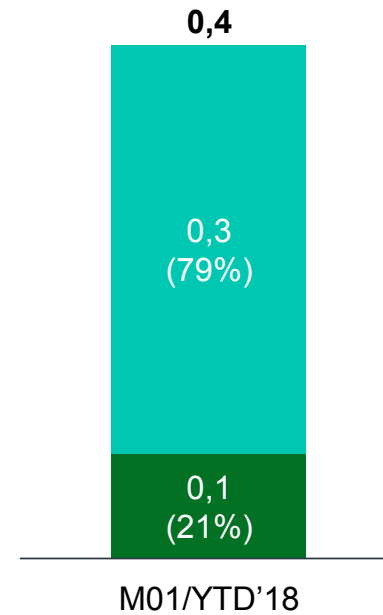
Russia retail market structure in January 2018

Retail Sell-In: Share of Pharmacy chains in Retail Sell-In is 84% in value and 79% in volume

VALUE, BLN RUB



VOLUME, BLN PACKS

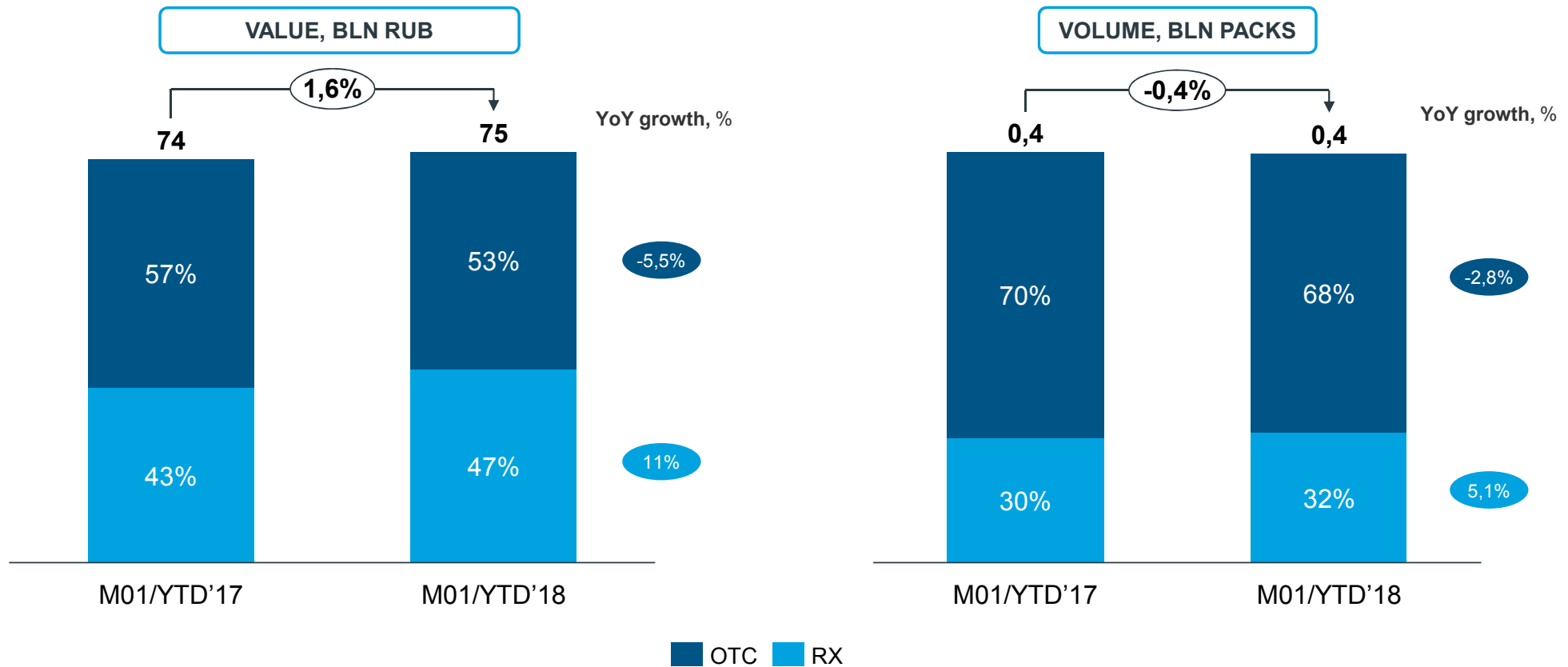


■ Pharmacy Chains
■ Individual pharmacies



Russia retail market growth in January 2018

Retail Sell-Out: Market grew by 1,6% in value and -0,4% in volume

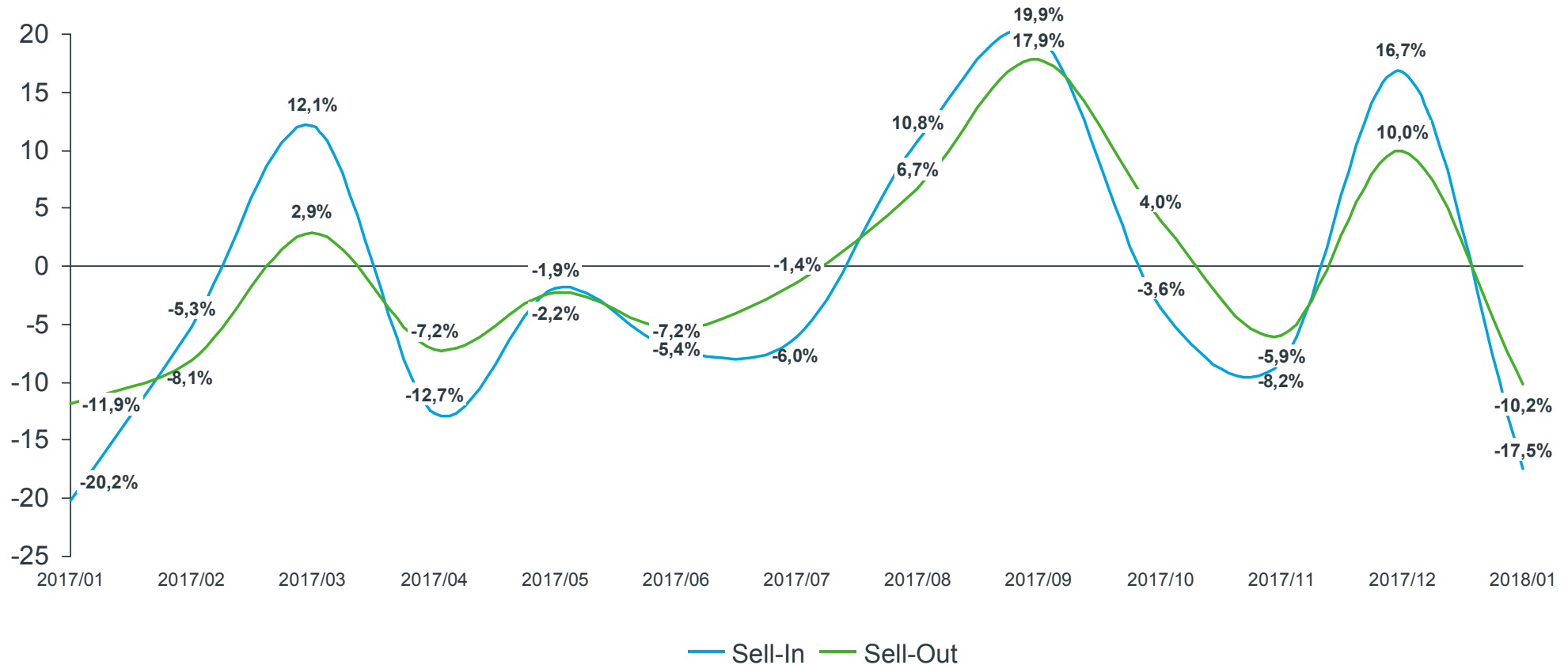


Source: IQVIA databases. Pharmatrend. Retail Market in Russia (exclude food supplements and diagnostic agents), FIN Prices



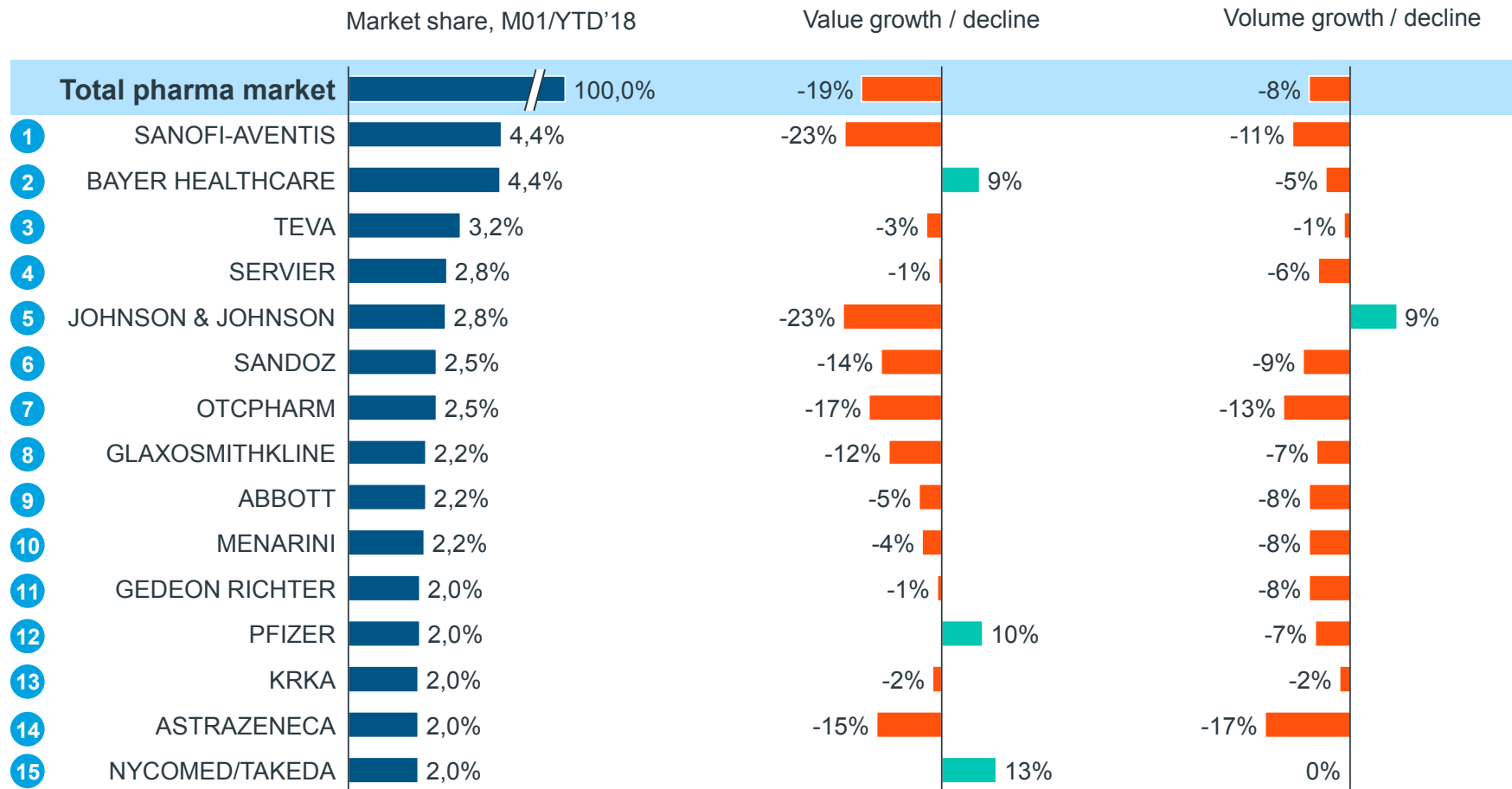
Sell-In vs Sell-Out, OTC registered drugs

Month-Over-Month Growth Rates, volume



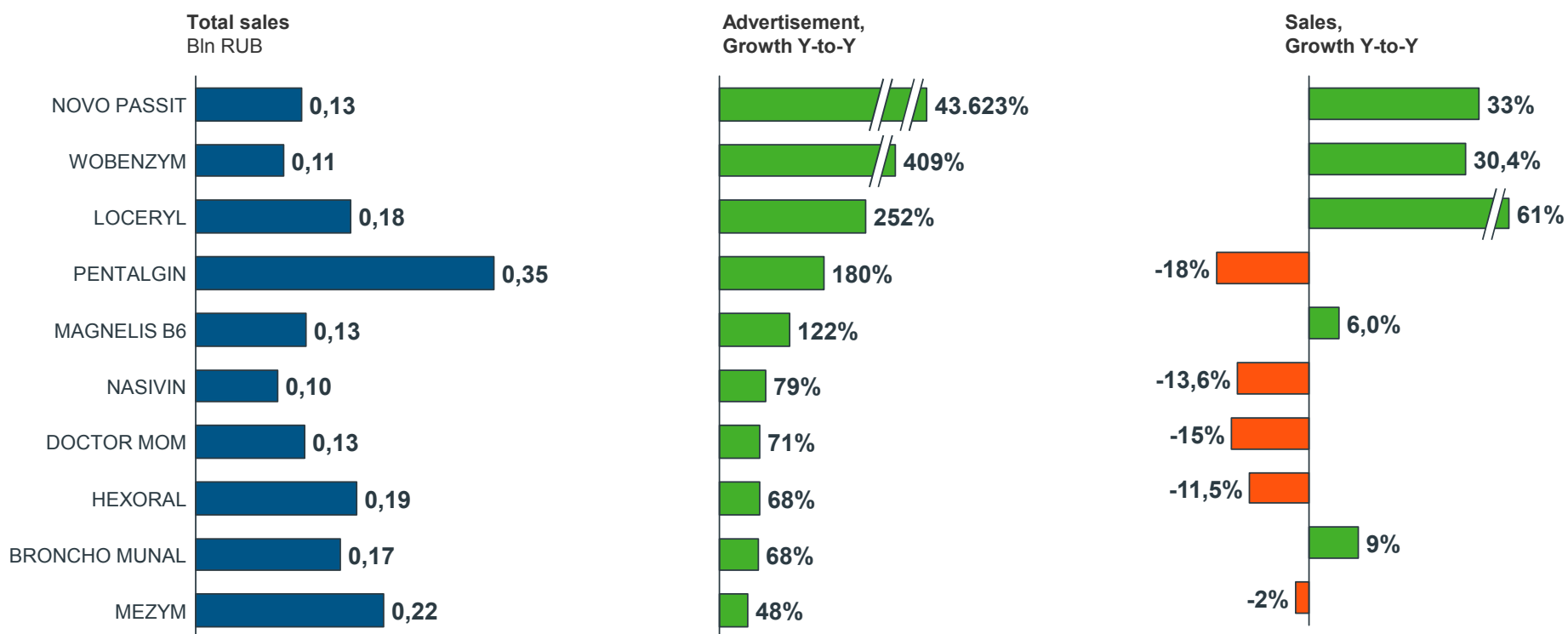


TOP-15 corporations on Russian market, January 2018



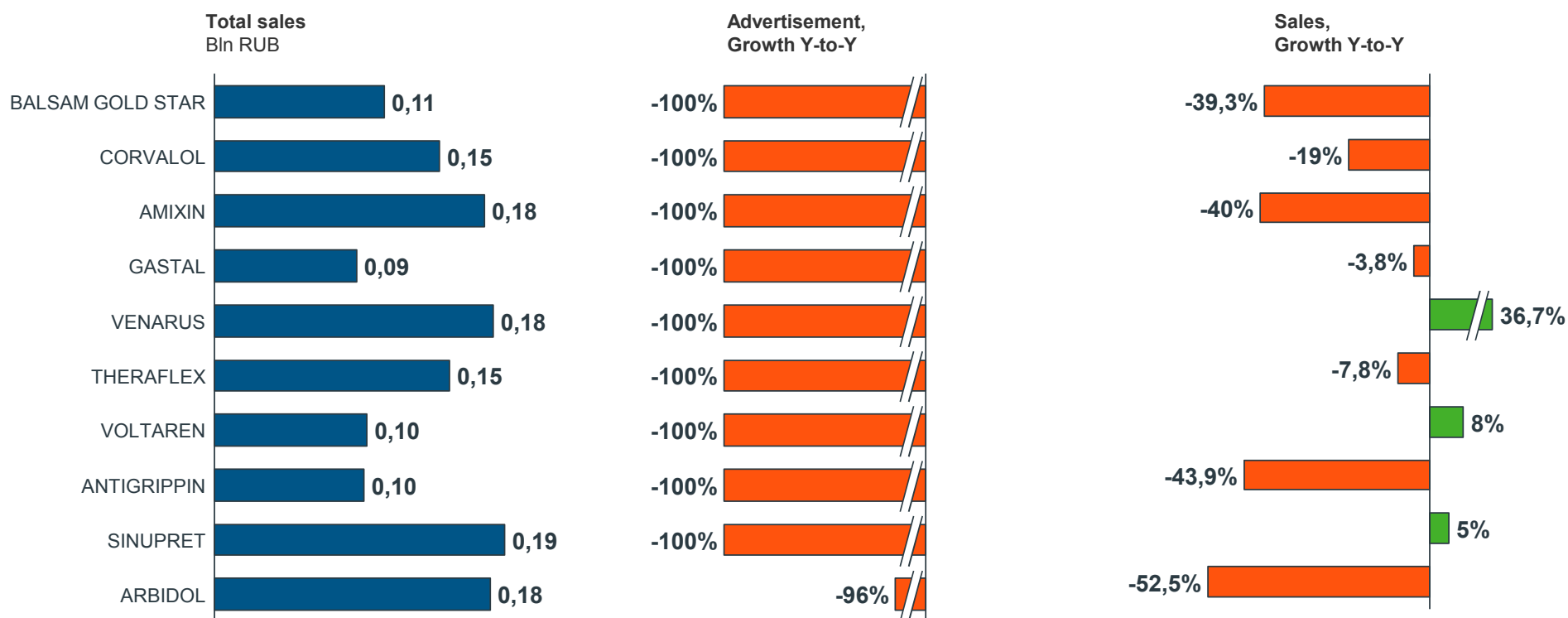
Source: IQVIA databases. Total Market(exclude food supplements and diagnostic agents), TRD Prices

TOP-10 products by growth in advertisement investments in January 2018



Source: Pharmatrend data, Mediascope data, FIN Prices

TOP-10 products by decline in advertisement investments in January 2018



Source: Pharmatrend data, Mediascope data, FIN Prices

Rating of largest distributors by direct DRUG supply share (incl. reimbursement), 2017



Rank	Wholesaler	Direct drug supply share, %	
		2017	2016
1	Protek	18,36%	18,65%
2	Katren	17,46%	18,30%
3	Pulse	13,81%	13,08%
4	R-Pharm	4,80%	4,80%
5	Pharmkomplekt	4,51%	3,81%
6	BSS	3,69%	4,18%
7	Grand Capital	2,70%	1,81%
8	Profitmed	2,09%	2,14%
9	Irvin 2	1,70%	0,95%
10	Euroservice	1,34%	1,44%
Total		70,47%	69,18%

Rating of largest pharmacy chains and associations by the size of direct sales of drugs for 2017



Excluding reimbursement drug provision

No	Regions	Pharmacy chains and associations	Number of outlets as of January 2018	MS in retail drug pharmaceutical market, % 2017	Drug sales growth 2017/ 2016	Indicator of the relative sales volume for the drug assortment for 2017 (regarding the leading audited company)	Average check, RUB.
1	79	ASNA	8365	14,72%	98,71%	2,785	357,00
2	13	APTEKI 36.6 ¹	1765	5,28%	8,01%	1	-
3	49	Rigla ²	2031	4,89%	28,65%	0,925	494,74
4	44	Erkapharm ³	1240	3,86%	63,74%	0,730	-
5	8	Neo-pharm	446	2,54%	50,18%	0,481	-
6	25	April	870	1,98%	123,38%	0,375	430,01
7	7	Farmland	950	1,80%	26,15%	0,342	491,42
8	14	Farmakopeika-Tvoy Doctor	892	1,72%	8,70%	0,325	-
9	55	Melodia Zdorovia	1262	1,49%	38,22%	0,282	338,00
10	8	Sotsial'naya Apteka (Nektar)	337	0,94%	7,02%	0,179	438,81
Total:			18 158	39,23%	50,56%		

1 Incl. AVE Group; Gorzdrav; A5 Group, Pharmacor

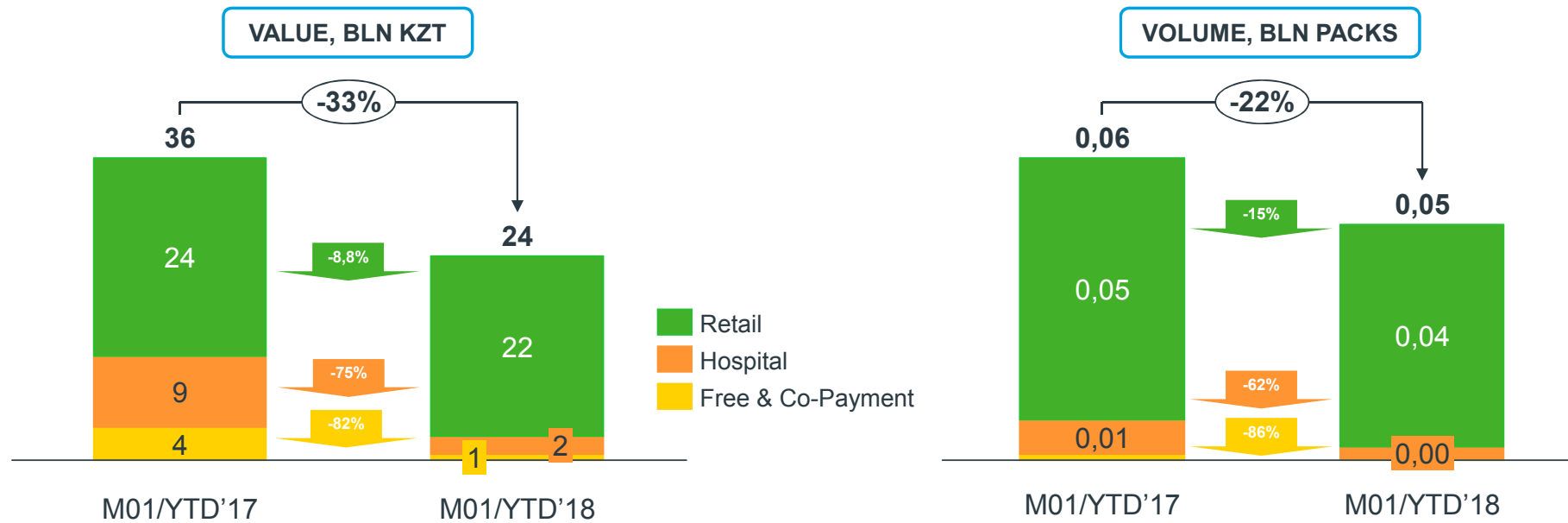
2 incl. O3, Zhivika, DOMpharma

3 Incl. Ozerki, Doctor Stoletov, Raduga



Kazakhstan pharma market growth in January 2018

Market decreases by -33% in value and -22% in volume

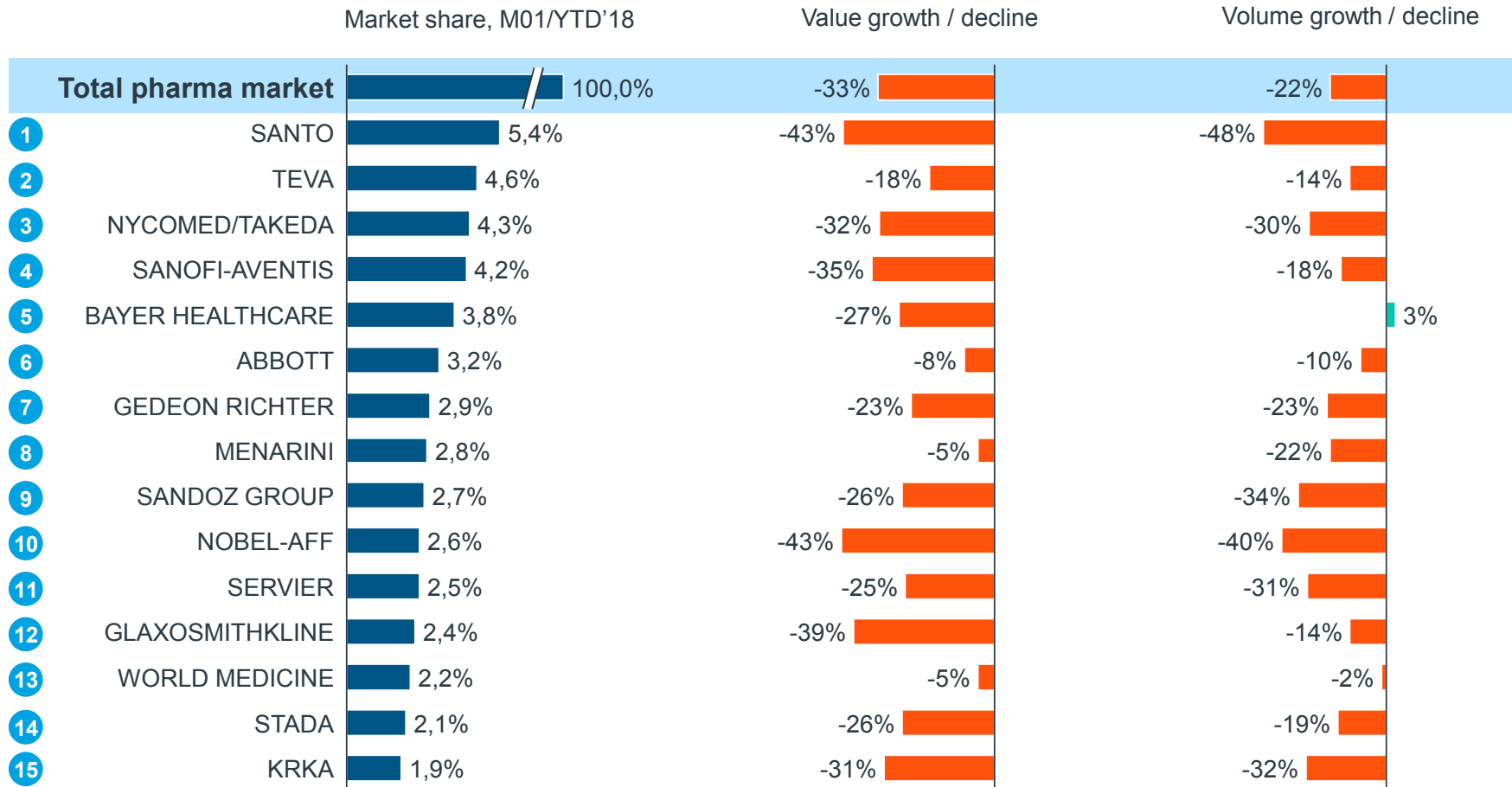


Indicator	KZT	USD	EUR	PACKS
Value M01/YTD 2018, Bln.	24	0,08	0,06	0,05
Growth M01/YTD,%	▼ -33%	▼ -32%	▼ -41%	▼ -22%

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



TOP-15 corporations on Kazakhstan market, January 2018

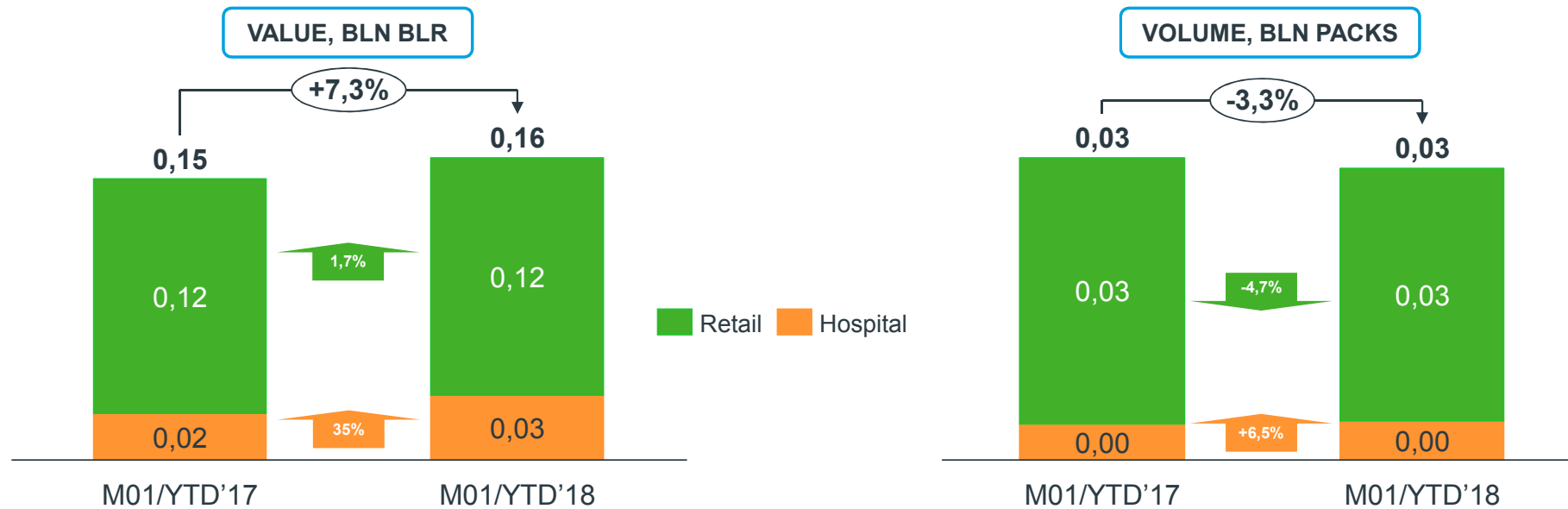


Source: IQVIA databases. Total Market (exclude food supplements and diagnostic agents), TRD Prices



Belarus pharma market growth in January 2018

Market grew by 7,3% in value and -3,3% in volume

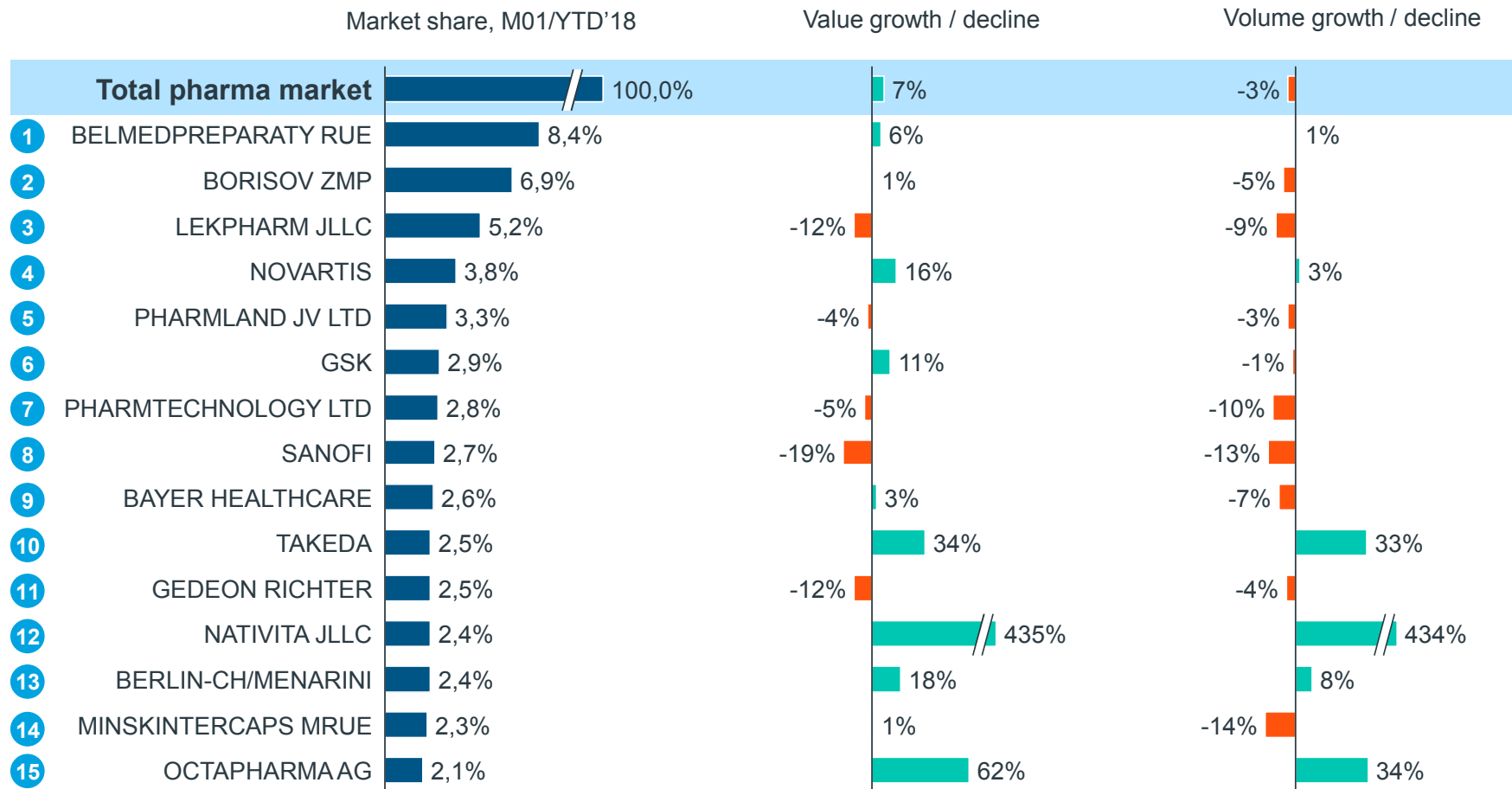


Indicator	BLR	USD	EUR	PACKS
Value M01/YTD 2018, Bln.	0,2	0,08	0,06	0,03
Growth M01/YTD,%	▲ 7%	▲ 5%	▼ -8%	▼ -3%

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



TOP-15 corporations on Belarus market, January 2018



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

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