























































Facts from IQVIA

M09 2018

EAEU & CIS, Russia Countries ranking in January-September 2018, Total market, Value in Bln. USD and Units

Total Market grows by 19% in LC and decreases by -4% in USD and -1% in volume

	Retail pharma sales Bln USD, M09/YTD'18	Retail pharma sales Bln Units, M09/YTD'18	Growth In percent in USD	Growth In percent in Local Currency	Growth In percent in Units
Total market	 16,40	 5,45	-4% 	 19%	-1% 
1. RUSSIA	 13,21	 3,81	-2% 	 3%	-2% 
2. KAZAKHSTAN*	 0,98	 0,46	-7% 	-3% 	-2% 
3. BELARUS	 0,67	 0,26	 6%	 11%	0%
4. UZBEKISTAN	 0,67	 0,47	-43% 	 24%	 3%
5. AZERBAIJAN	 0,28	 0,15	 15%	 13%	 12%
6. GEORGIA	 0,19	 0,09	0%	0%	-3% 
7. MOLDOVA	 0,12	 0,05	 11%	-1% 	 1%
8. ARMENIA	 0,11	 0,03	 11%	 11%	 10%
9. KYRGYZSTAN	 0,11	 0,09	 17%	 17%	 14%
10. MONGOLIA	 0,06	 0,04	 10%	 10%	 20%

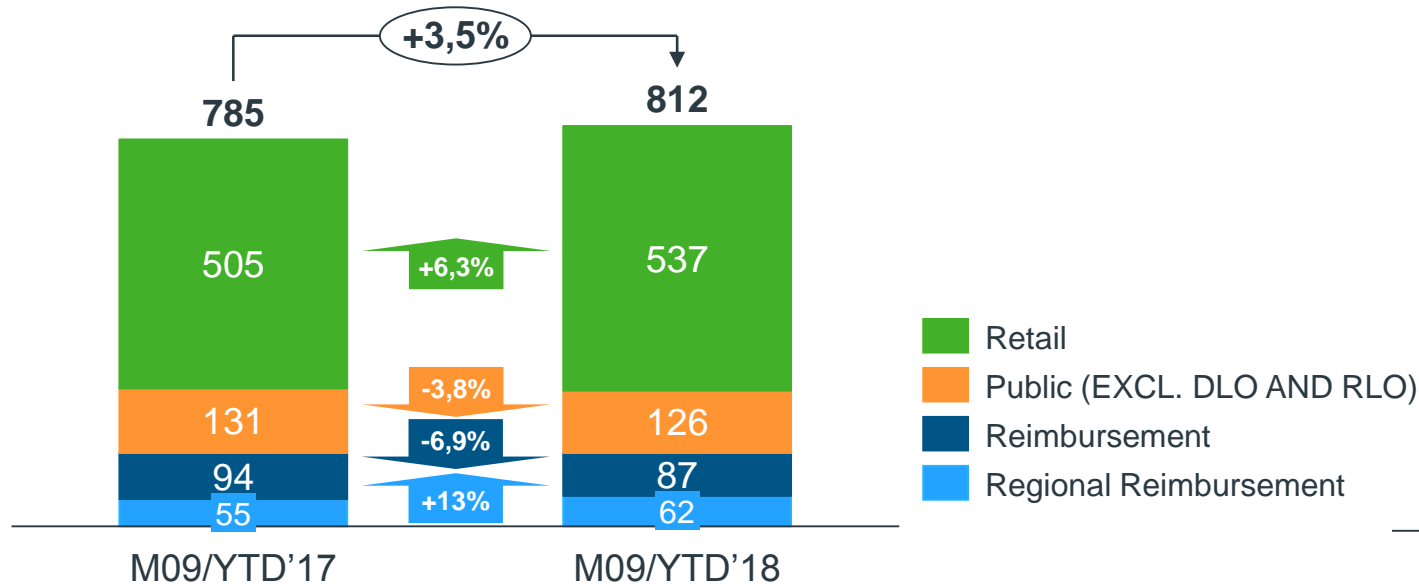
Source: IQVIA databases. Retail and Non-Retail (excluding food supplements and diagnostic agents), TRD Prices . Azerbaijan, Georgia and Armenia – retail only. Mongolia – Import
 *Kazakhstan figures will be increased by 5-10% after recalculation of public segment that will happen with M10 data release



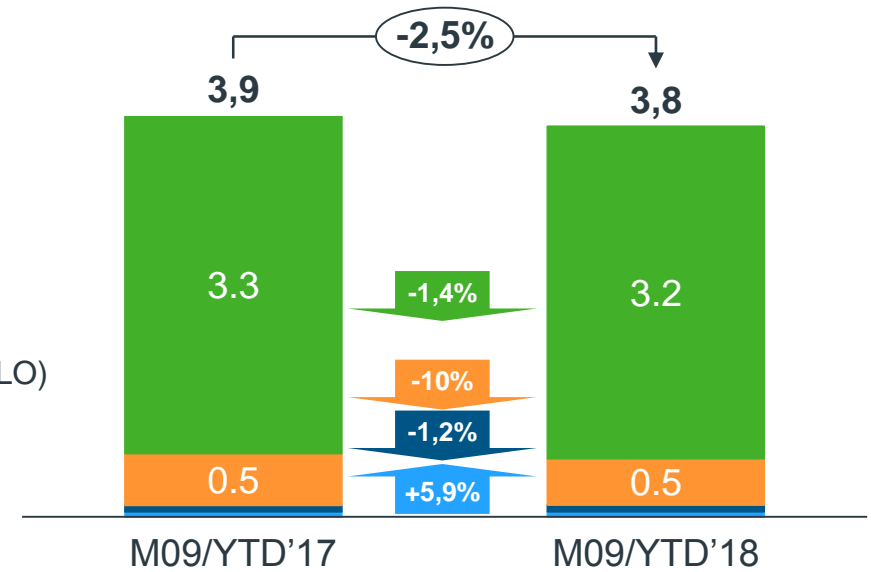
Russia pharma market growth in January-September 2018

Market grew by 3,5% in value and decreased by 2,5% in volume

VALUE, BLN RUB



VOLUME, BLN PACKS



Indicator	RUB	USD	EUR	PACKS
Value M09/YTD 2018, Bln.	812	13,2	11,1	3,8
Growth M09/YTD,%	▲ 3,5%	▼ -1,9%	▼ -8,7%	▼ -2,5%

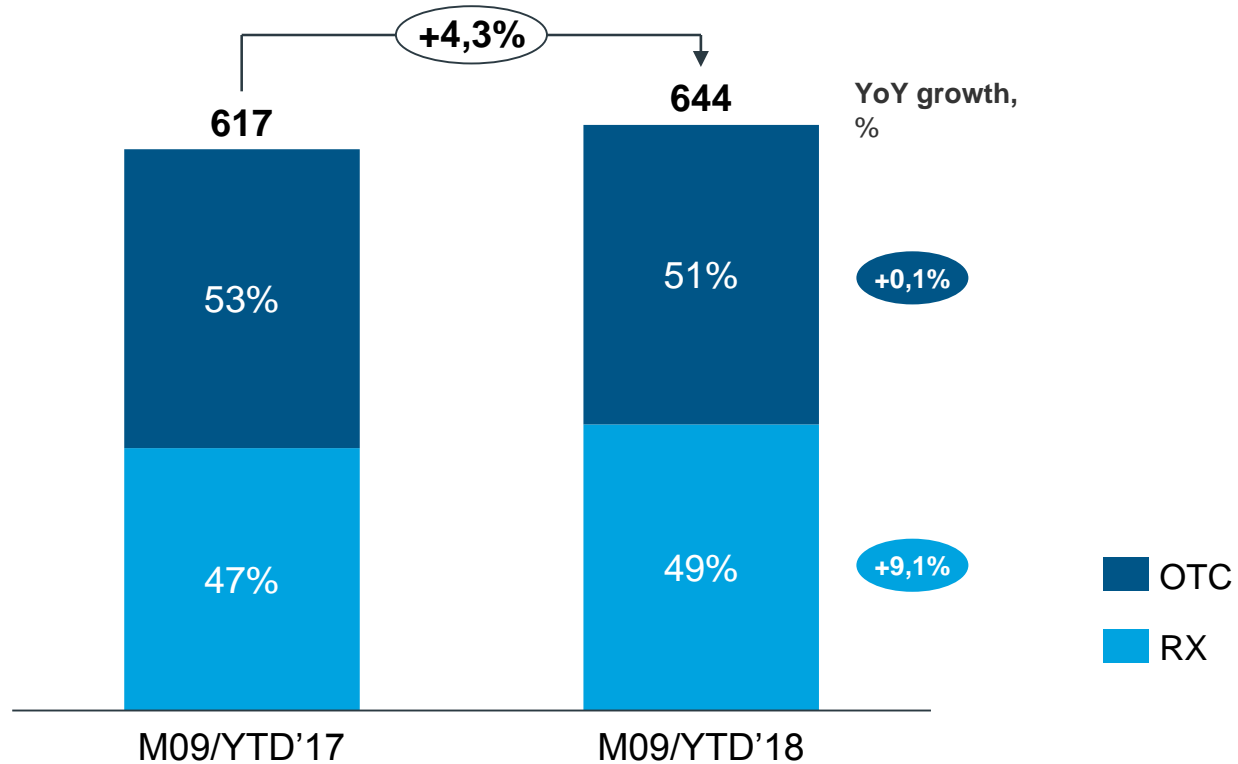
Source: IQVIA databases. Retail, Public, DLO, RLO (excluding food supplements and diagnostic agents), TRD Prices



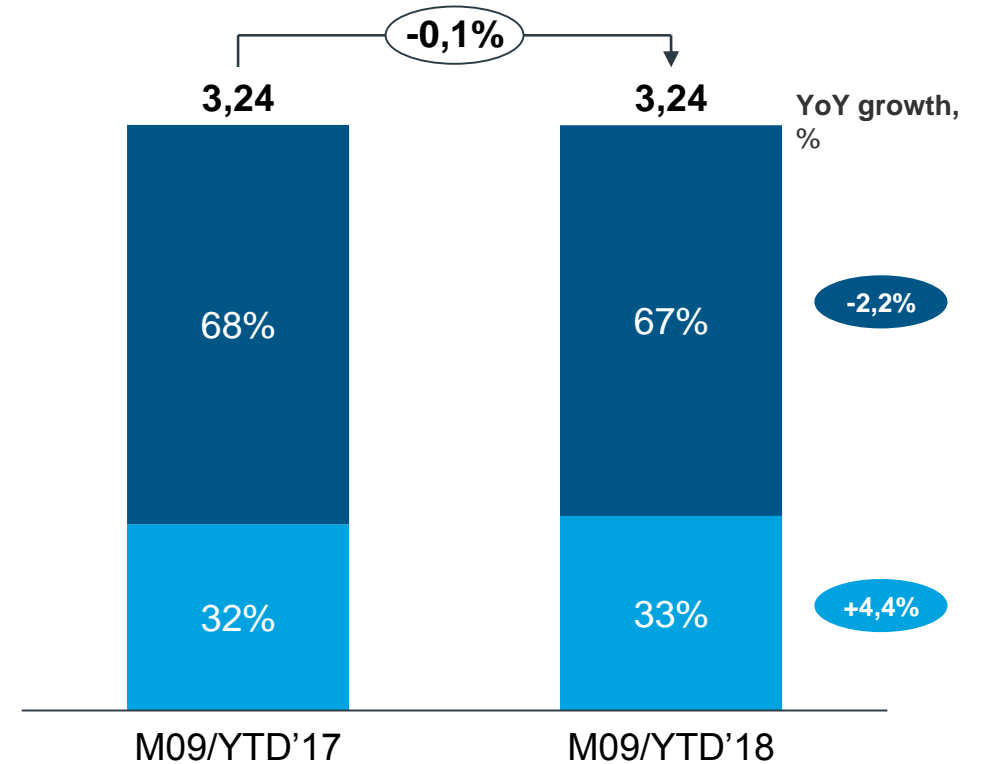
Russia pharma market growth in January-September 2018

Retail Sell-Out: Market grew by 4,3% in value and decreased by 0,1% in volume

VALUE, BLN RUB



VOLUME, BLN PACKS

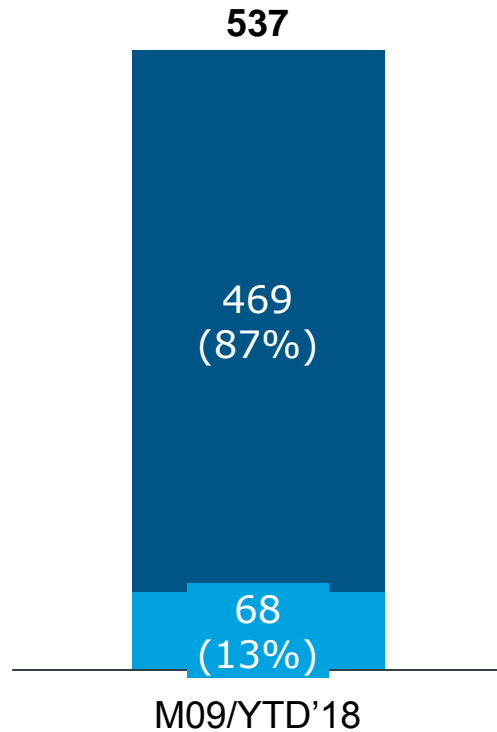




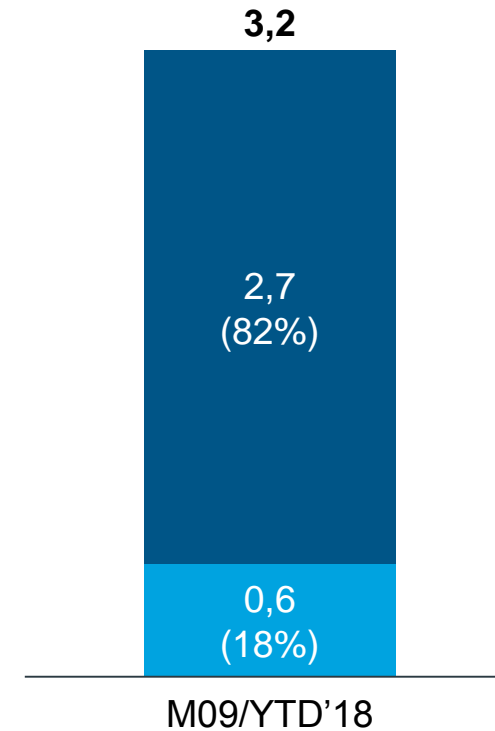
Russia retail market structure in January-September 2018

Retail Sell-In: Share of Pharmacy chains is 87% in value and 82% in volume

VALUE, BLN RUB



VOLUME, BLN PACKS

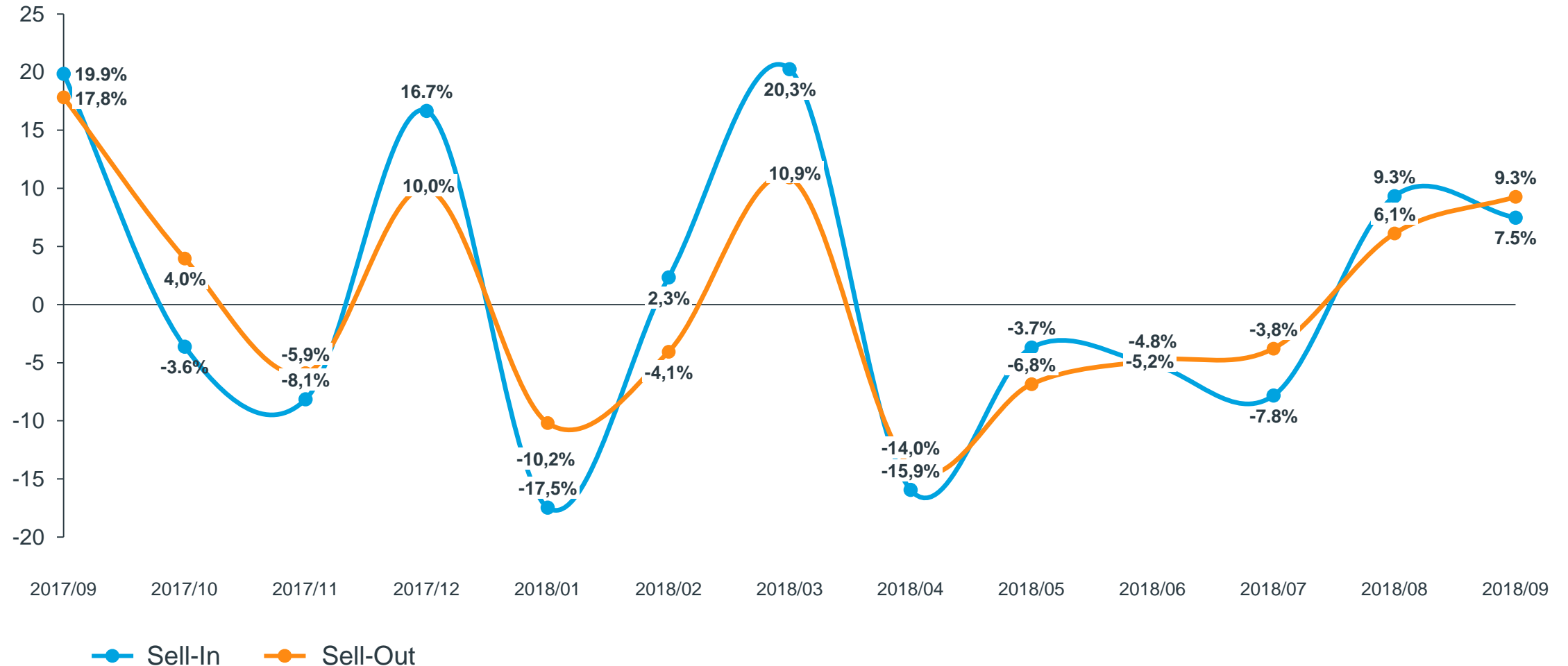


- Pharmacy Chains
- Individual pharmacies



Sell-In vs Sell-Out, OTC registered drugs

Month-Over-Month Growth Rates, volume



TOP-15 corporations on Russian market, January-September 2018



Market share, M09/YTD'18
In percent in Local Currency

Value growth / decline
In percent in Local Currency

Volume growth / decline
In percent in Packs

	Market share, M09/YTD'18 In percent in Local Currency	Value growth / decline In percent in Local Currency	Volume growth / decline In percent in Packs
Total pharma market	100,0%	3%	-2%
1. SANOFI-AVENTIS	4,7%	2%	1%
2. BAYER HEALTHCARE	3,9%	6%	-8%
3. JOHNSON & JOHNSON	2,9%	4%	-1%
4. TEVA	2,7%	0%	1%
5. PFIZER	2,5%	7%	-1%
6. SERVIER	2,5%	2%	-2%
7. SANDOZ	2,3%	3%	2%
8. NOVARTIS	2,3%	19%	4%
9. OTCPHARM	2,1%	5%	2%
10. GLAXOSMITHKLINE	2,1%	6%	-2%
11. ABBOTT	2,0%	5%	1%
12. NYCOMED/TAKEDA	1,9%	13%	5%
13. MENARINI	1,9%	3%	-3%
14. ASTRAZENECA	1,9%	6%	9%
15. KRKA	1,8%	8%	5%



TOP-15 brands on Russian market, January-September 2018

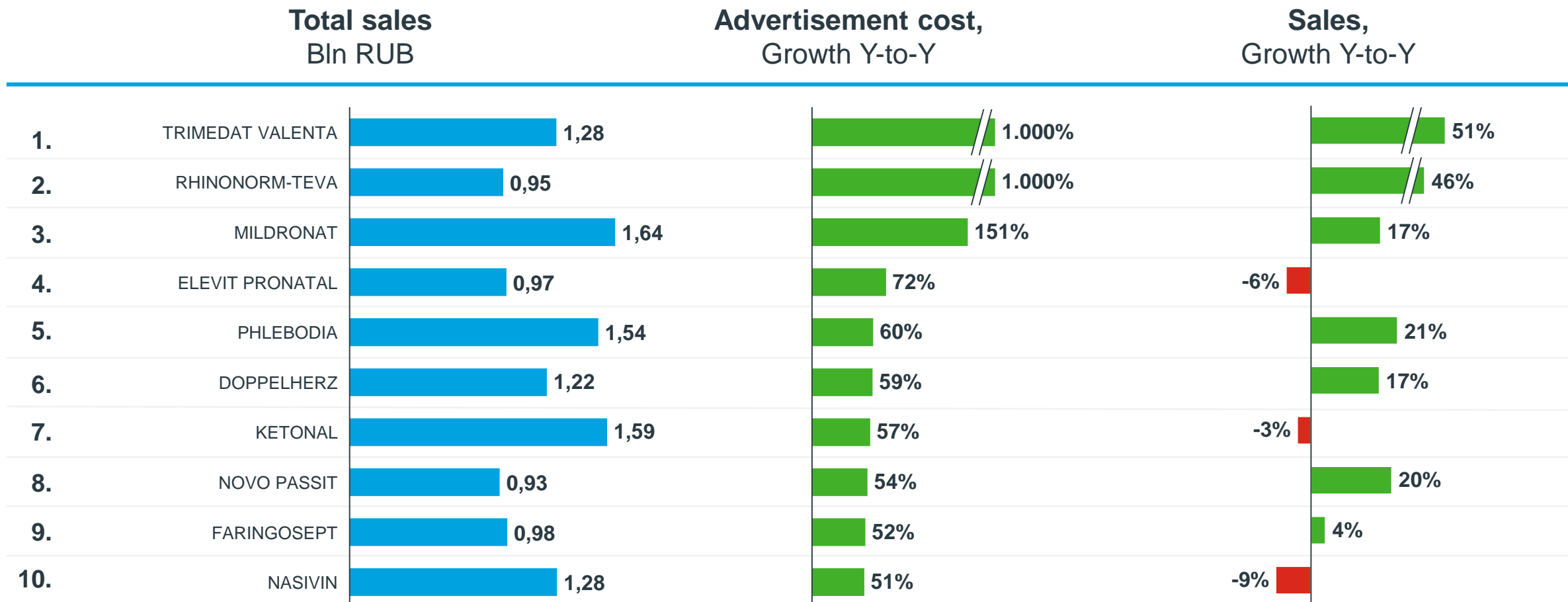
Market share, M09/YTD'18
In percent in Local Currency

Value growth / decline
In percent in Local Currency

Volume growth / decline
In percent in Packs

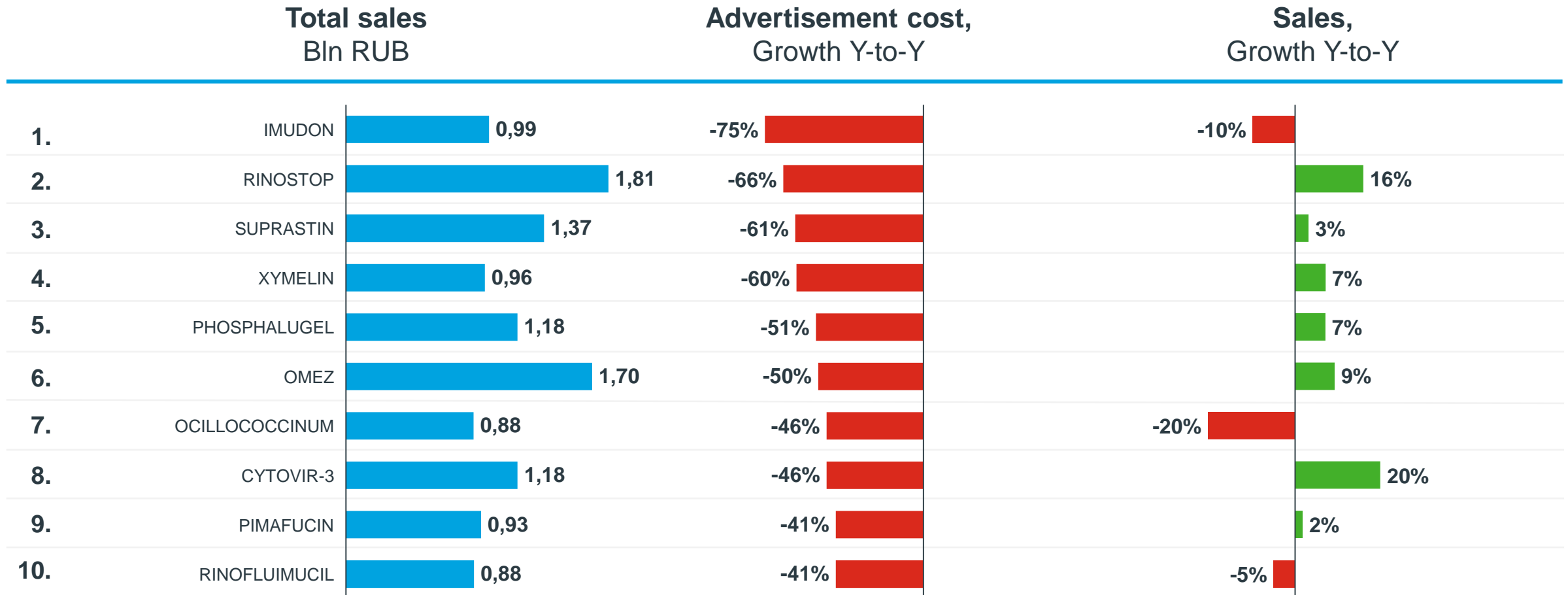
	Market share, M09/YTD'18 In percent in Local Currency	Value growth / decline In percent in Local Currency	Volume growth / decline In percent in Packs
Total pharma market	100,0%	3%	-2%
1. REVLIMIDE	0,9%	-12%	64%
2. SOLIRIS	0,7%	4%	4%
3. XARELTO	0,6%	38%	32%
4. PREVENAR 13	0,6%	-3%	-4%
5. DETRALEX	0,5%	8%	-1%
6. TOUJEO SOLOSTAR	0,5%	19%	17%
7. NATRIUM CHLORIDUM	0,5%	-11%	-3%
8. SOVIGRIPP	0,5%	37%	11%
9. ACTOVEGIN	0,5%	0%	-2%
10. MEXIDOL	0,4%	8%	7%
11. ACELLBIA	0,4%	-26%	-19%
12. INGAVIRIN	0,4%	14%	8%
13. CARDIOMAGNYL	0,4%	3%	1%
14. KALETRA	0,4%	-12%	-4%
15. KAGOCEL	0,4%	1%	-9%

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



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 2018

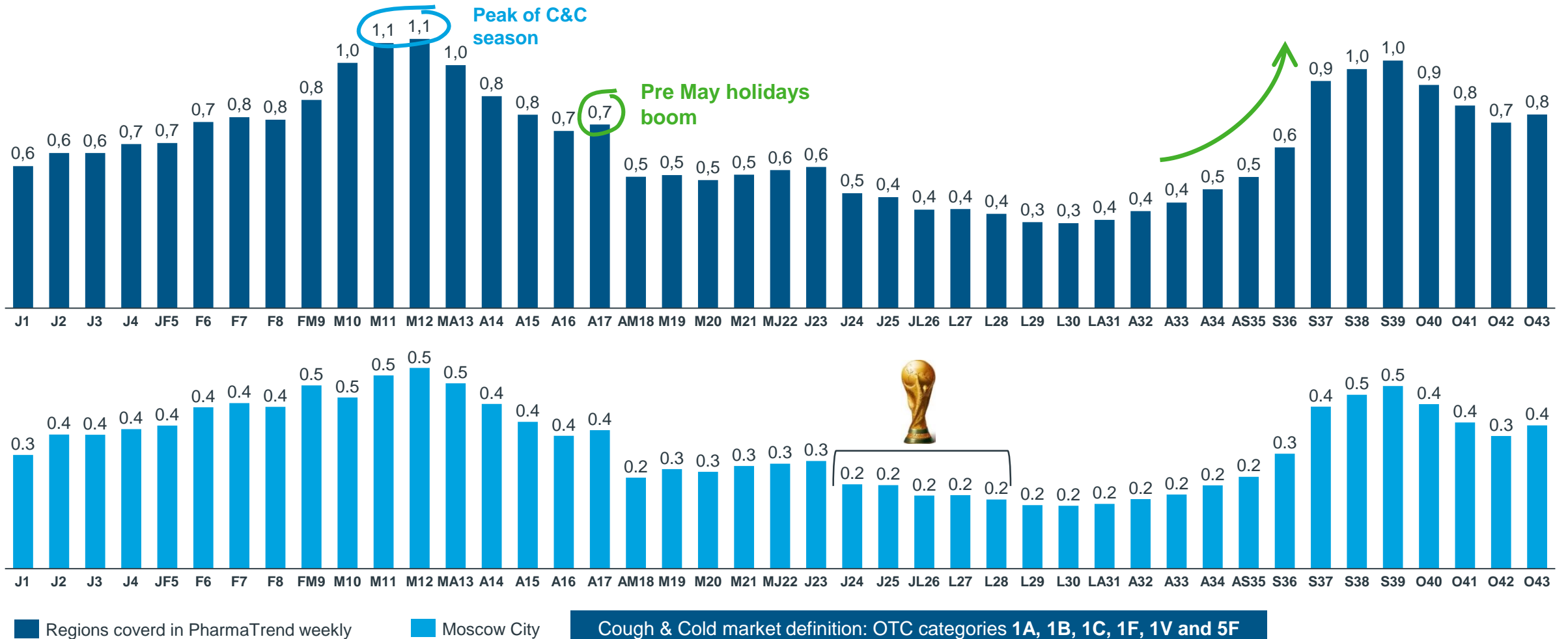


The rank is calculated among TOP-200 Brands by sales with advertising cost greater than 50 mln RUB
Source: IQVIA databases. Pharmatrend, Mediascope data, FIN Prices

The cough & cold season 2018/19 started quite well in the second week of September but experienced a slight break with the sunny weather in October



Weekly development of the cough & cold market in selected Russian regions and Moscow in P b



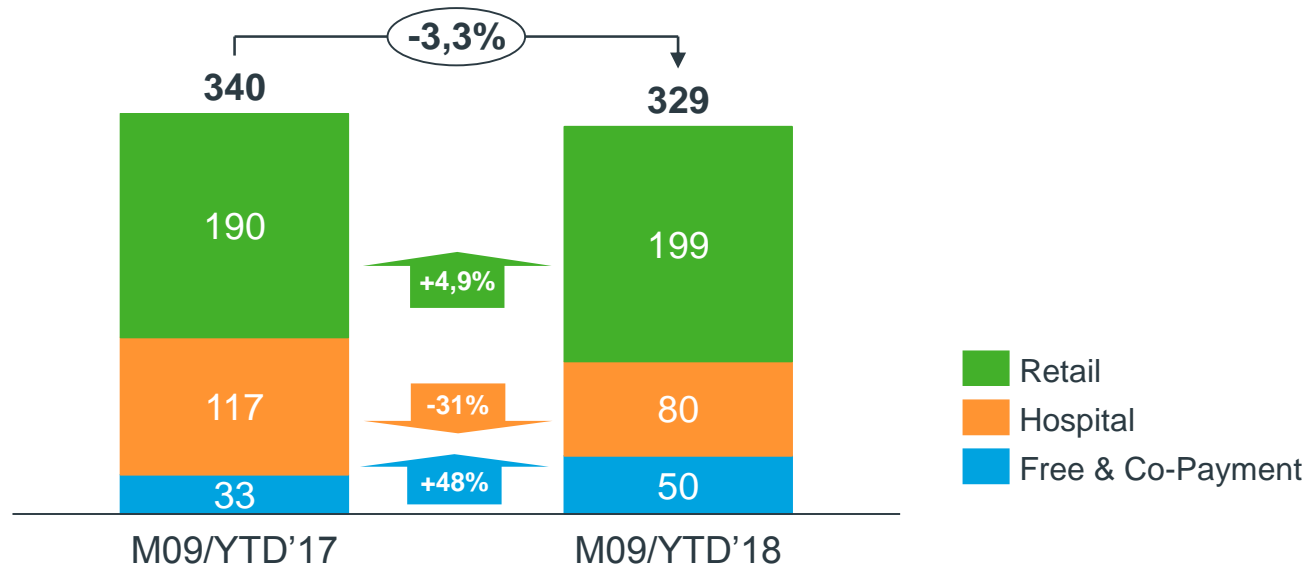
Source: IQVIA PharmaTrend weekly (sell-out at final consumer price)
Source: IQVIA PharmaTrend weekly



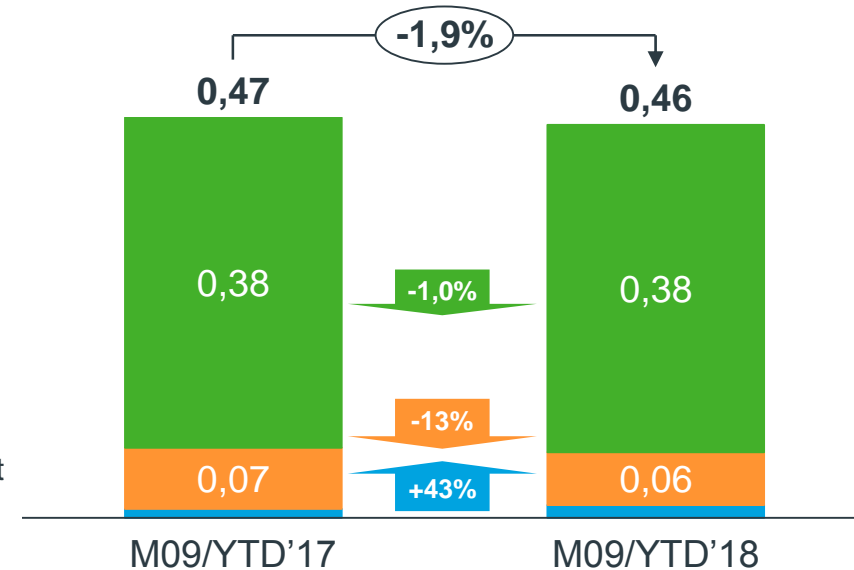
Kazakhstan pharma market growth in January-September 2018

Market decreased by 3,3% in value and by 1,9% in volume

VALUE, BLN KZT



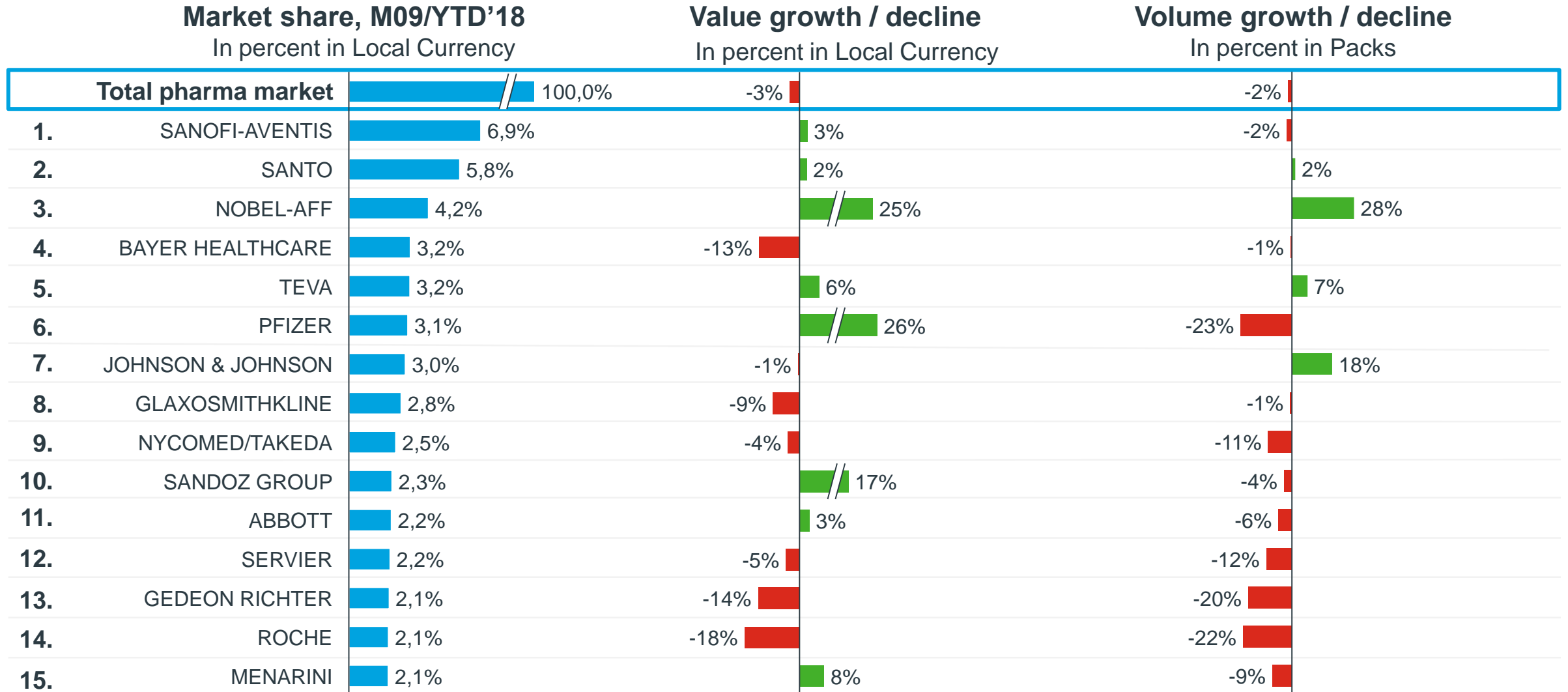
VOLUME, BLN PACKS



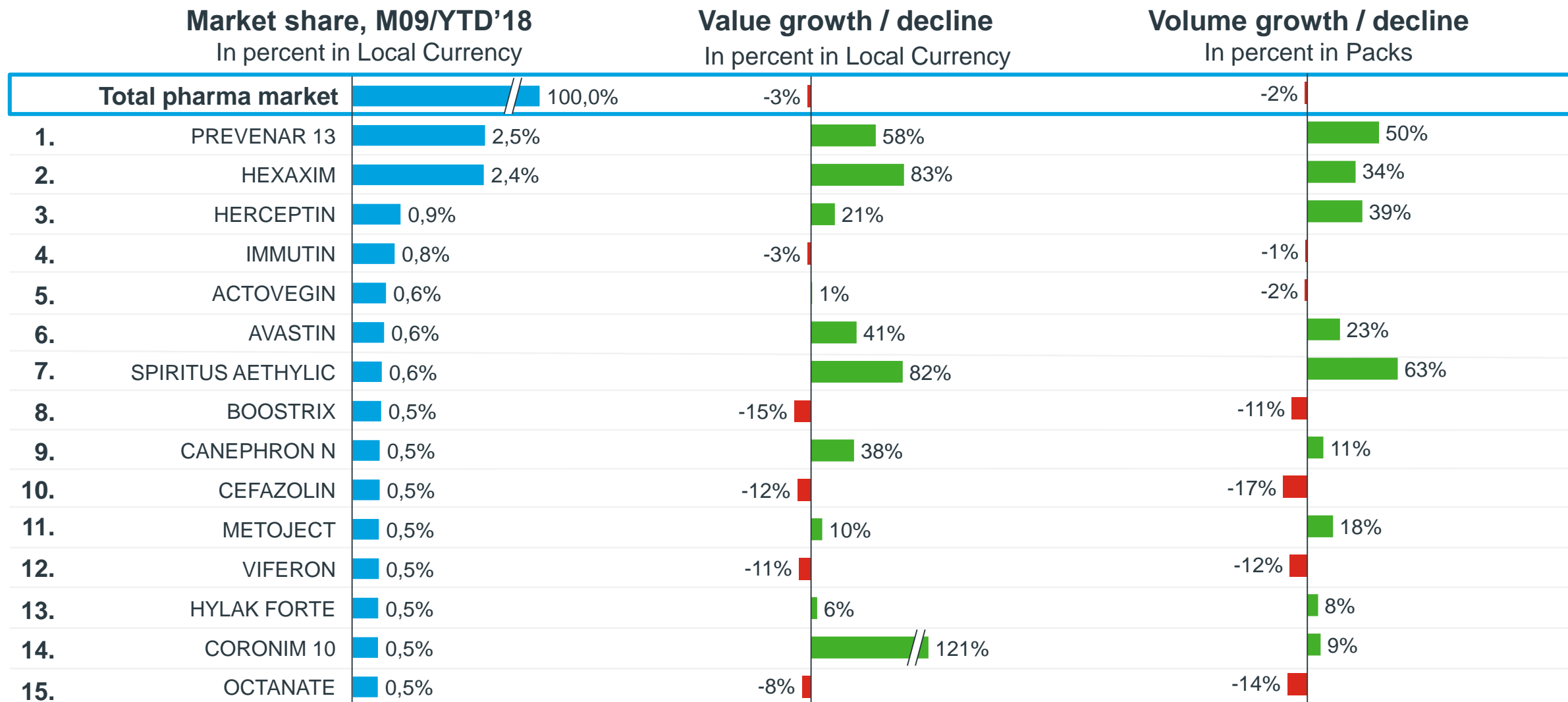
Indicator	KZT	USD	EUR	PACKS
Value M09/YTD 2018, Bln.	329	0,98	0,82	0,46
Growth M09/YTD,%	▼ -3,3%	▼ -7,3%	▼ -13%	▼ -1,9%

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

TOP-15 corporations on Kazakhstan market, January-September 2018



TOP-15 brands on Kazakhstan market, January-September 2018

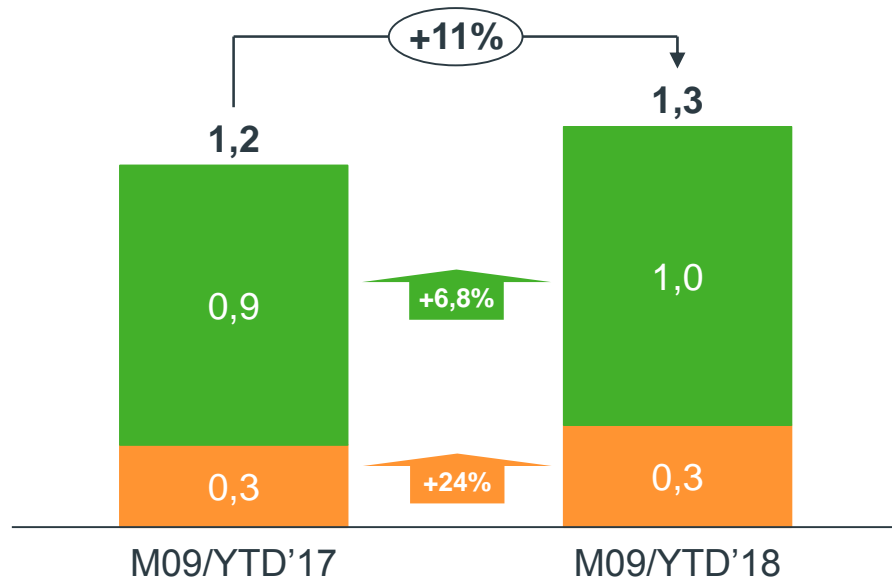




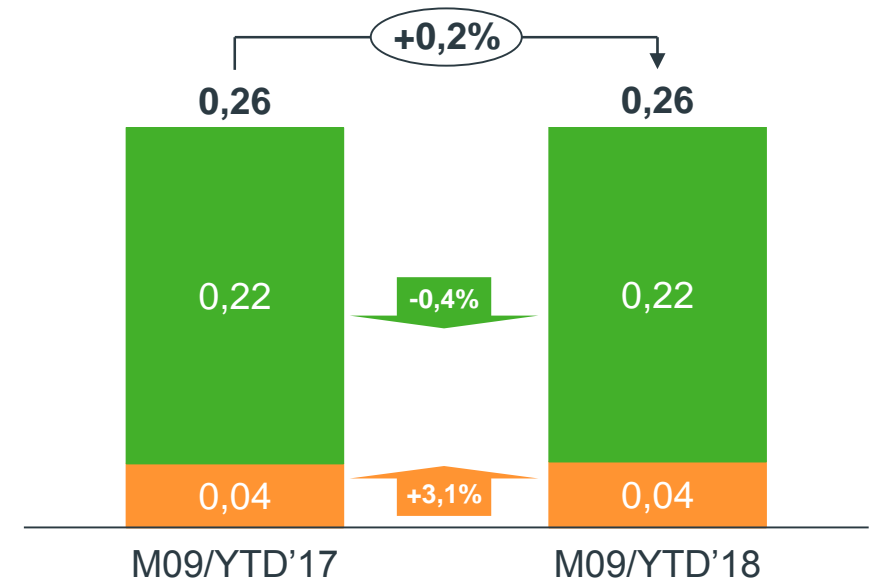
Belarus pharma market growth in January-September 2018

Market grew by 11% in value and by 0,2% in volume

VALUE, BLN BLR



VOLUME, BLN PACKS



■ Retail
■ Hospital

Indicator	BLR	USD	EUR	PACKS
Value M09/YTD 2018, Bln.	1,35	0,67	0,56	0,26
Growth M09/YTD,%	▲ 11%	▲ 5,6%	▼ -2,1%	▲ 0,2%

TOP-15 corporations on Belarus market, January-September 2018



Market share, M09/YTD'18
In percent in Local Currency

Value growth / decline
In percent in Local Currency

Volume growth / decline
In percent in Packs

	Market share, M09/YTD'18 In percent in Local Currency	Value growth / decline In percent in Local Currency	Volume growth / decline In percent in Packs
Total pharma market	100,0%	11%	0%
1. BELMEDPREPARATY RUE	10,0%	6%	0%
2. BORISOV ZMP	7,5%	8%	-2%
3. LEKPHARM JLLC	5,1%	-2%	3%
4. NOVARTIS	4,1%	29%	11%
5. PHARMLAND JV LTD	3,2%	7%	11%
6. BAYER HEALTHCARE	2,7%	22%	-4%
7. PHARMTECHNOLOGY LTD	2,6%	2%	-8%
8. SANOFI	2,6%	-6%	-21%
9. GSK	2,5%	25%	19%
10. GEDEON RICHTER	2,5%	3%	6%
11. BERLIN-CH/MENARINI	2,3%	15%	5%
12. MINSKINTERCAPS MRUE	2,2%	6%	-4%
13. NATIVITA JLLC	2,1%	90%	74%
14. KRKA	1,9%	26%	32%
15. TAKEDA	1,7%	10%	31%



TOP-15 brands on Belarus market, January-September 2018

Market share, M09/YTD'18
In percent in Local Currency

Value growth / decline
In percent in Local Currency

Volume growth / decline
In percent in Packs

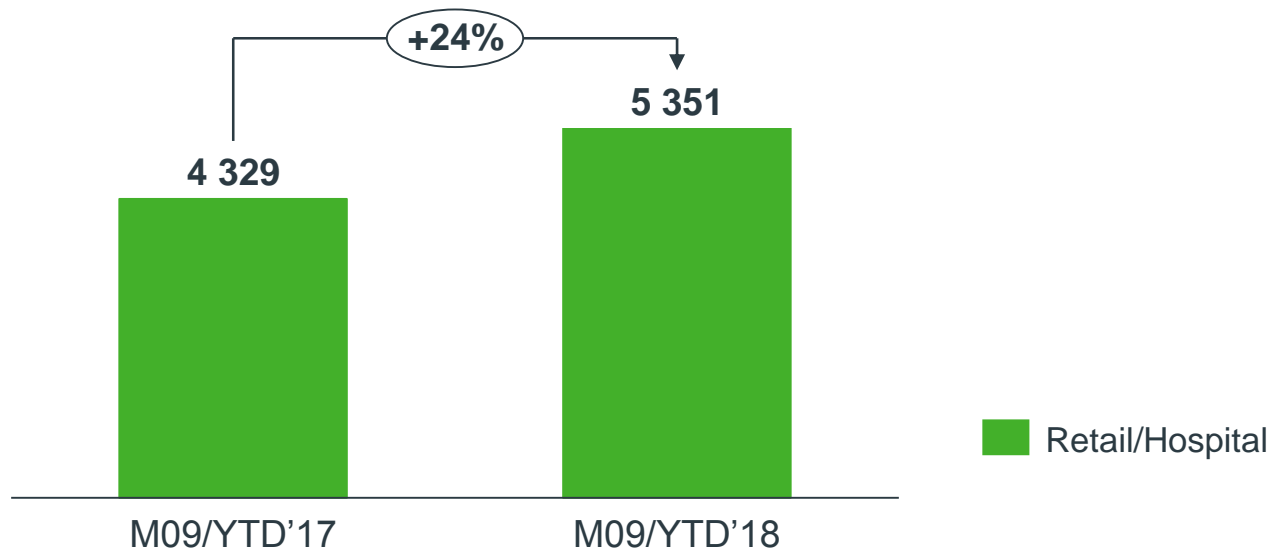
	Market share, M09/YTD'18 In percent in Local Currency	Value growth / decline In percent in Local Currency	Volume growth / decline In percent in Packs
Total pharma market	100,0%	11%	0%
1. T-MAB	1,0%	33%	35%
2. SODIUM CHLORIDE	1,0%	9%	7%
3. LINEZOLID	0,9%	129%	35%
4. OCTANATE	0,7%	188%	157%
5. GLICLAZIDE MR	0,6%	6%	6%
6. METFORMIN	0,6%	16%	11%
7. PROTAMINE-INSULIN HS	0,6%	9%	13%
8. LISINOPRIL	0,6%	1%	-4%
9. R-MAB	0,5%	431%	631%
10. XARELTO	0,5%	147%	199%
11. ADVAGRAF	0,5%	841%	1 307%
12. CEREPRO	0,5%	17%	17%
13. LOSARTAN	0,5%	14%	13%
14. LENALIDOMIDE	0,5%	1 116%	1 194%
15. ATORVASTATIN	0,5%	15%	14%



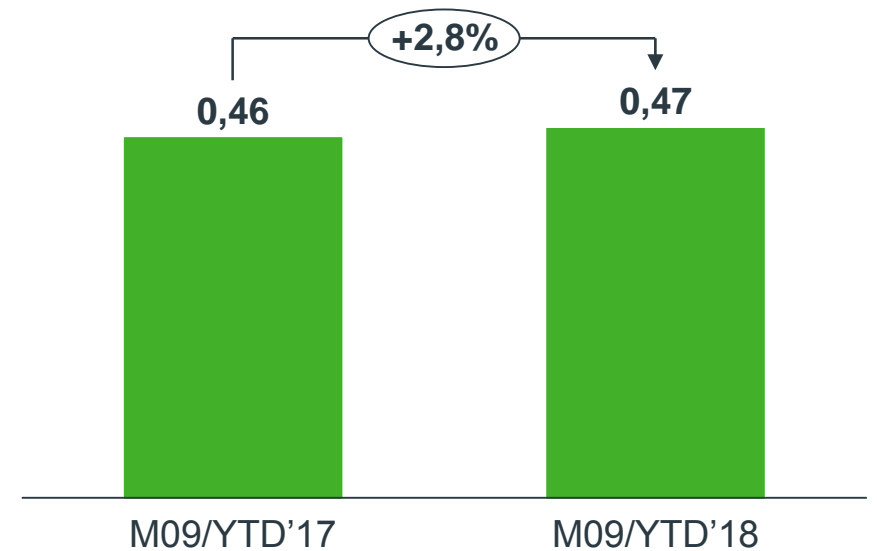
Uzbekistan pharma market growth in January-September 2018

Market grew by 24% in value and by 2,8% in volume

VALUE, BLN UZS



VOLUME, BLN PACKS



Indicator	UZS	USD	EUR	PACKS
Value M09/YTD 2018, Bln.	5 351	0,67	0,56	0,47
Growth M09/YTD,%	▲ 24%	▼ -43%	▼ -47%	▲ 2,8%

TOP-15 corporations on Uzbekistan market, January-September 2018



Market share, M09/YTD'18
In percent in Local Currency

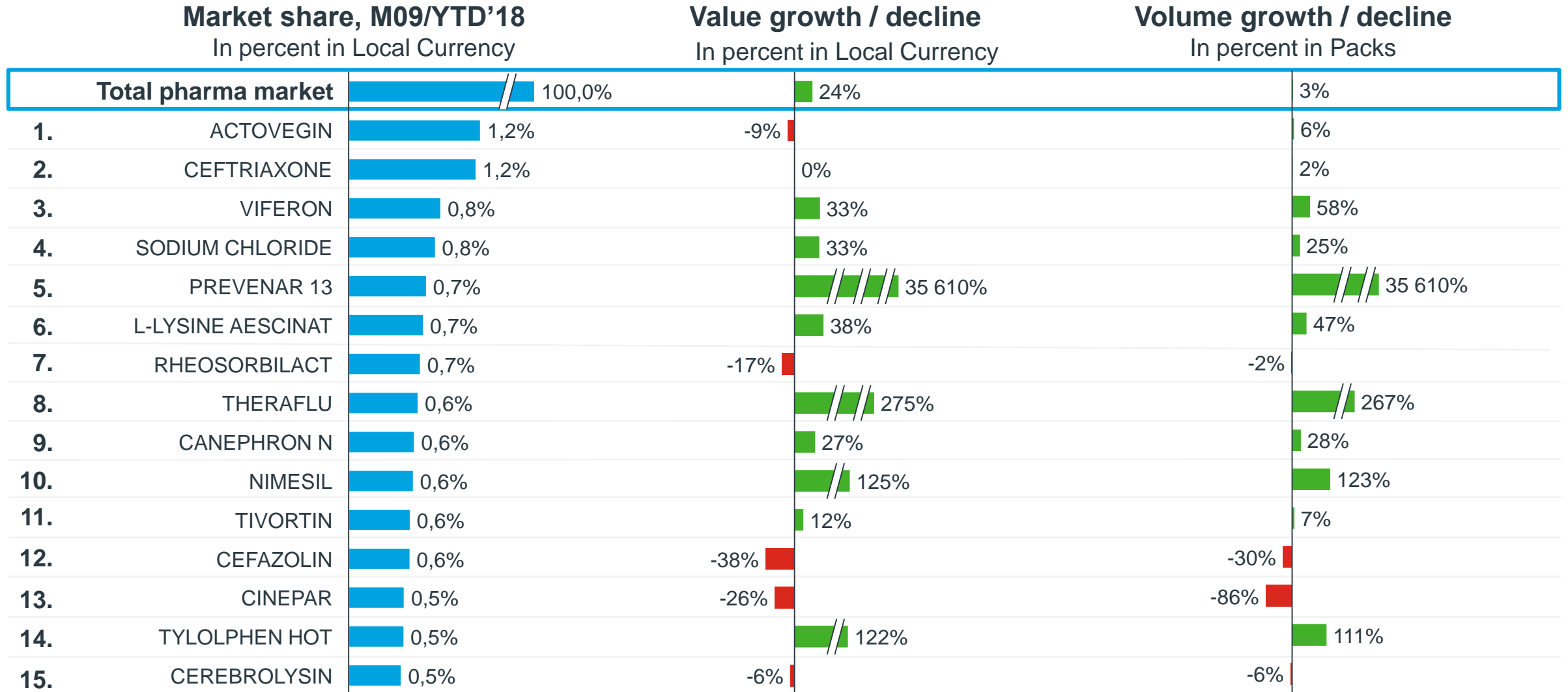
Value growth / decline
In percent in Local Currency

Volume growth / decline
In percent in Packs

	Market share, M09/YTD'18 In percent in Local Currency	Value growth / decline In percent in Local Currency	Volume growth / decline In percent in Packs
Total pharma market	100,0%	24%	3%
1. BERLIN-CH/MENARINI	3,7%	33%	7%
2. KRKA	3,1%	35%	39%
3. SANOFI	3,0%	49%	25%
4. FARMAK	2,8%	15%	12%
5. JURABEK LABORAT	2,3%	16%	24%
6. WORLD MEDICINE	2,3%	96%	72%
7. GEDEON RICHTER	2,2%	-9%	-1%
8. TAKEDA	2,0%	-1%	21%
9. ABBOTT	2,0%	21%	27%
10. ARTERIUM	2,0%	41%	50%
11. NOBEL ILAC SANAYII	1,8%	65%	28%
12. POLPHARMA	1,8%	56%	80%
13. NOVARTIS	1,7%	18%	16%
14. G.M.P. LTD	1,7%	43%	32%
15. YURIYA-PHARM UKR	1,7%	6%	8%



TOP-15 brands on Uzbekistan market, January-September 2018



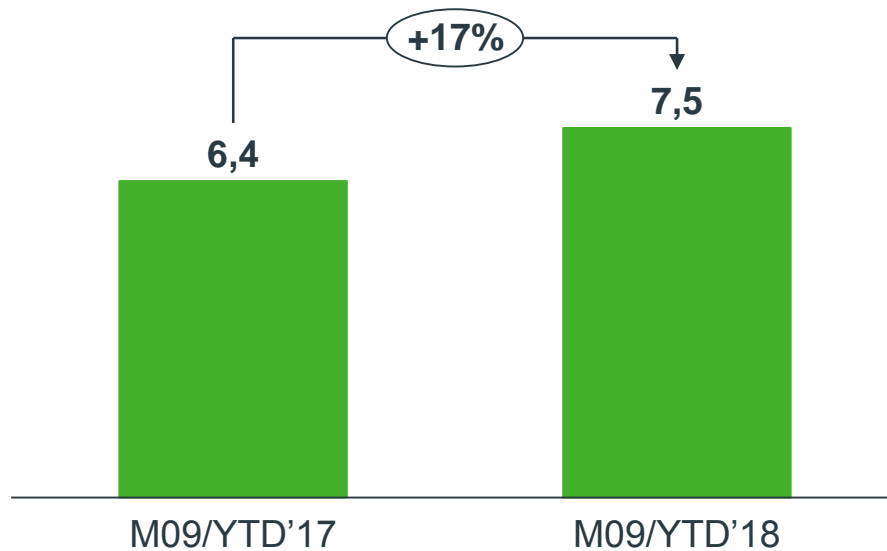
Source: IQVIA databases Retail, Hospital Market (exclude food supplements and diagnostic agents), TRD Prices



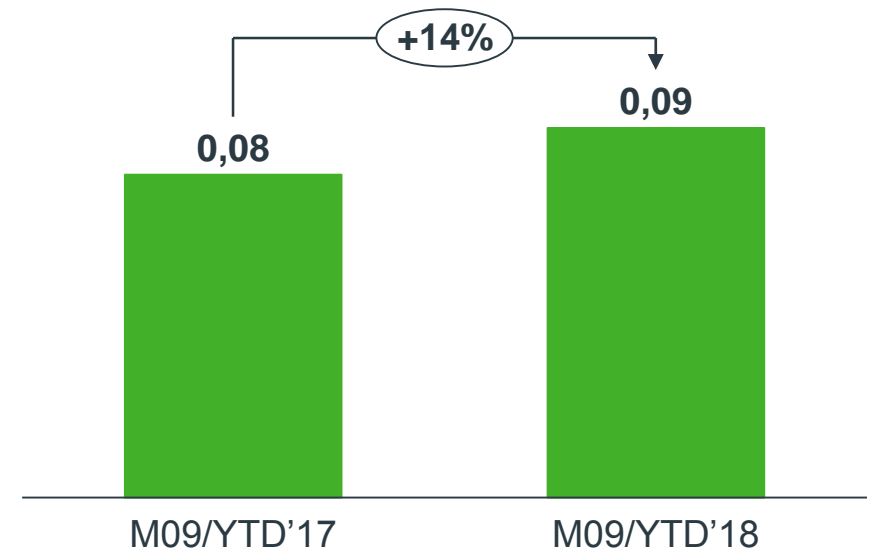
Kyrgyzstan pharma market growth in January-September 2018

Market grew by 17% in value and by 14% in volume

VALUE, BLN KGS



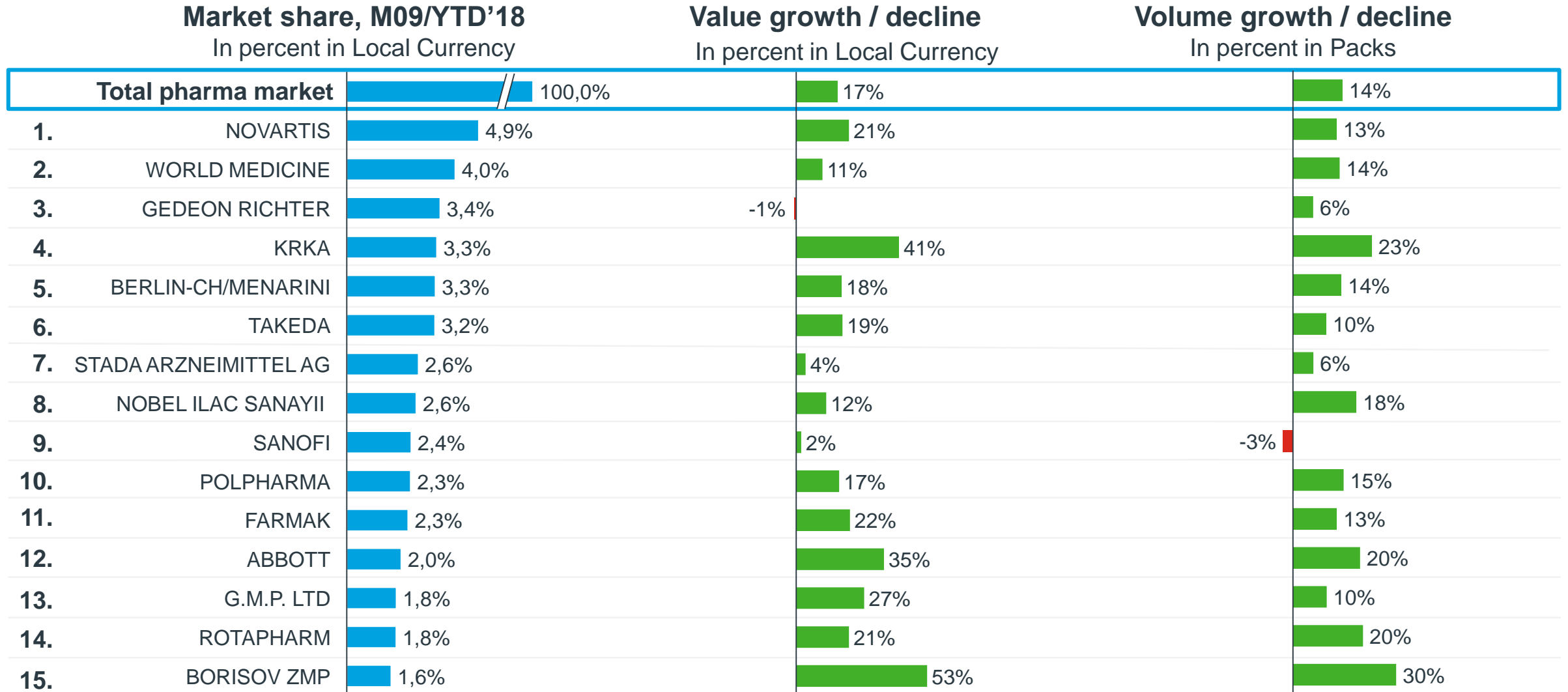
VOLUME, BLN PACKS



■ Retail/Hospital

Indicator	KGS	USD	EUR	PACKS
Value M09/YTD 2018, Bln.	7,5	0,11	0,09	0,09
Growth M09/YTD,%	▲ 17%	▲ 17%	▲ 9,2%	▲ 14%

TOP-15 corporations on Kyrgyzstan market, January-September 2018





TOP-15 brands on Kyrgyzstan market, January-September 2018

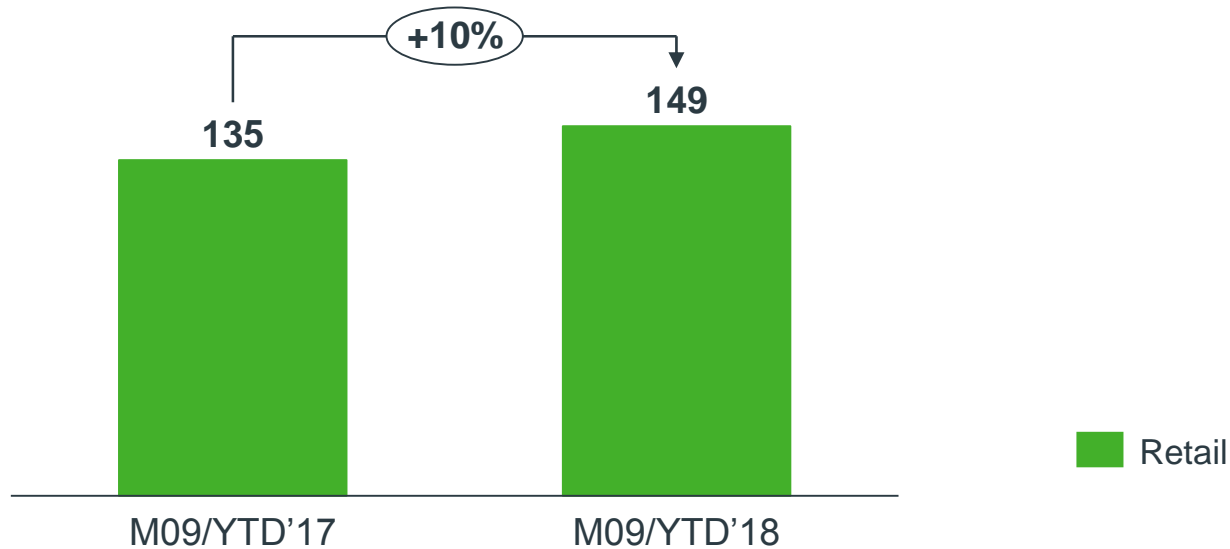
Market share, M09/YTD'18 In percent in Local Currency		Value growth / decline In percent in Local Currency	Volume growth / decline In percent in Packs
Total pharma market 100,0%		17%	14%
1.	TYLOL HOT 1,2%	-3%	1%
2.	SODIUM CHLORIDE 1,1%	26%	48%
3.	ACTOVEGIN 1,0%	6%	-5%
4.	NUROFEN FOR CHILDREN 0,9%	18%	14%
5.	CANEPHRON N 0,7%	47%	34%
6.	CONCOR 0,7%	3%	-18%
7.	CEFTRIAXONE 0,6%	-6%	-1%
8.	TROXEVASIN 0,6%	0%	6%
9.	AMOXICILLIN 0,6%	17%	29%
10.	CARDIOMAGNYL 0,6%	48%	24%
11.	POLYOXIDONIUM 0,6%	54%	46%
12.	DUPHASTON 0,6%	39%	43%
13.	VIFERON 0,5%	7%	8%
14.	FLEMOXIN SOLUTAB 0,5%	31%	27%
15.	AMPICILLIN 0,5%	-12%	-16%



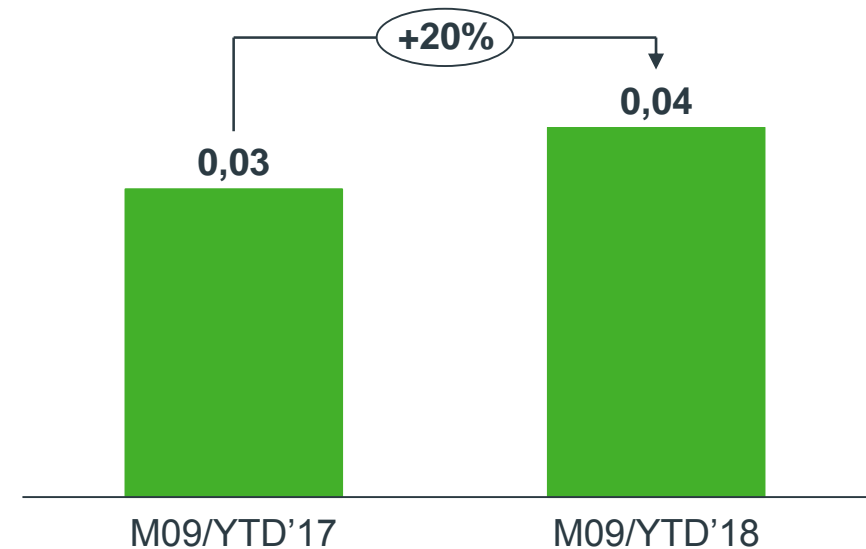
Mongolian pharma market growth in January-September 2018

Market grew by 10% in value and by 20% in volume

VALUE, BLN MNT



VOLUME, BLN PACKS



Indicator	MNT	USD	EUR	PACKS
Value M09/YTD 2018, Bln.	149	0,06	0,05	0,04
Growth M09/YTD,%	▲ 10%	▲ 10%	▲ 3,4%	▲ 20%

TOP-15 corporations on Mongolian market, January-September 2018



Market share, M09/YTD'18
In percent in Local Currency

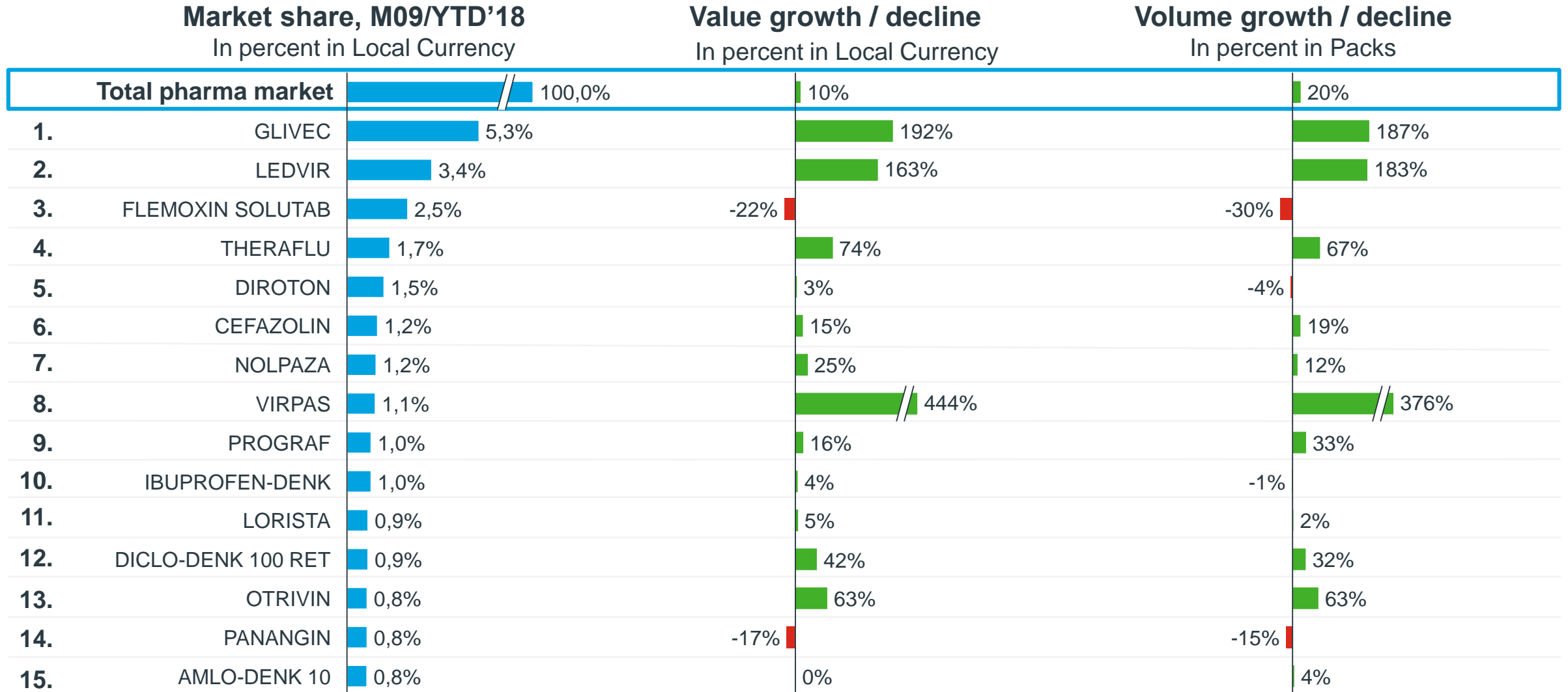
Value growth / decline
In percent in Local Currency

Volume growth / decline
In percent in Packs

	Market share, M09/YTD'18 In percent in Local Currency	Value growth / decline In percent in Local Currency	Volume growth / decline In percent in Packs
Total pharma market	100,0%	10%	20%
1. KRKA	10,9%	8%	-1%
2. GEDEON RICHTER	8,1%	-7%	-5%
3. DENK PHARMA	7,3%	8%	-4%
4. NOVARTIS	7,2%	136%	29%
5. ASTELLAS PHARMA	6,0%	-29%	-39%
6. MYLAN LABORAT.IND	4,2%	168%	38%
7. SANDOZ	4,0%	4%	1%
8. GLAXOSMITHKLINE	3,1%	53%	63%
9. SANOFI-AVENTIS	1,9%	9%	-11%
10. BAYER CONSUM.CARE	1,8%	29%	25%
11. UNIDENTIFIED MANUF	1,6%	11%	-76%
12. BAYER HEALTHCARE	1,4%	5%	-48%
13. HIMALAYA	1,3%	57%	52%
14. NYCOMED/TAKEDA	1,2%	-7%	1%
15. STRIDES SHASUN LIM	1,2%	464%	552%



TOP-15 brands on Mongolian market, January-September 2018



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

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