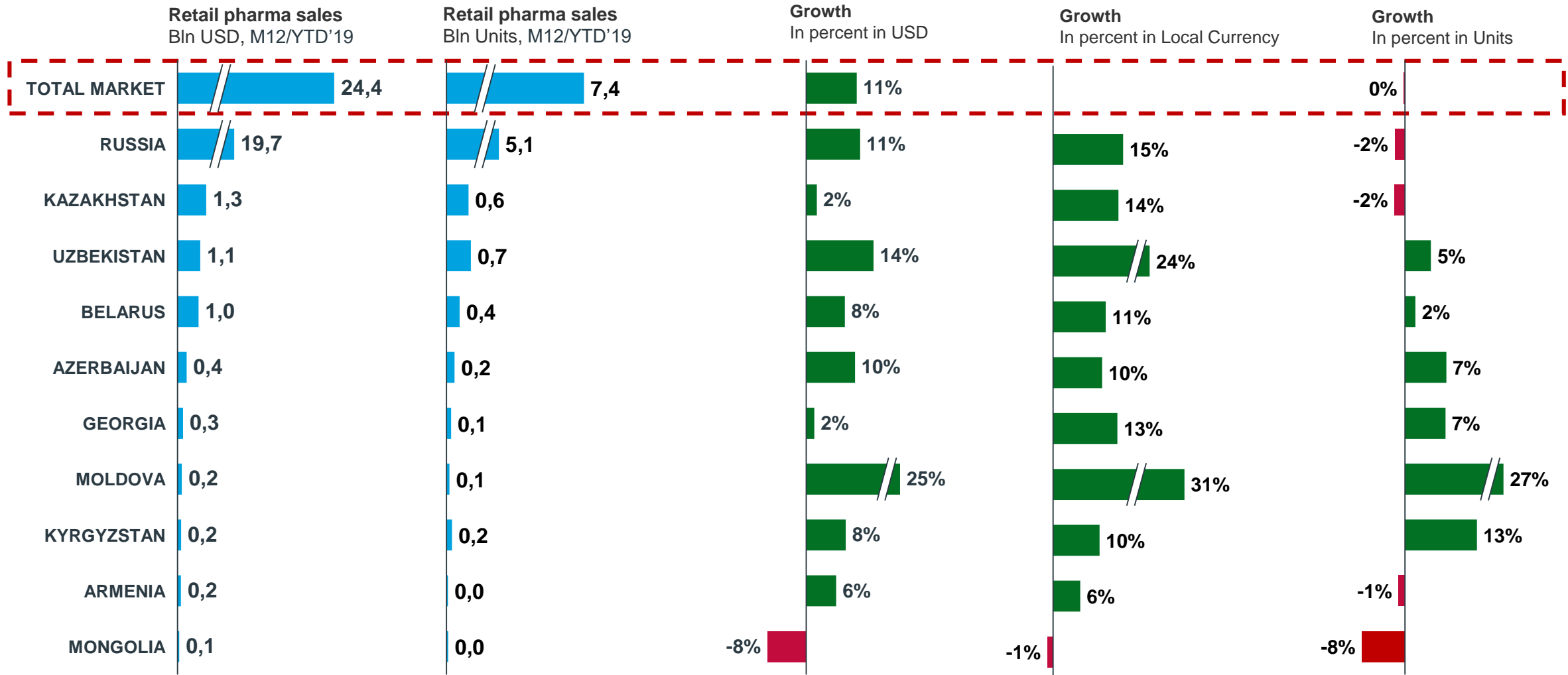


Facts from IQVIA

M12 2019

EAEU & CIS, Russia Countries ranking in January-December 2019, Total market, Value in Bln. USD and Units

Total Market increases by 11% in USD and decreased by 0,2% in volume



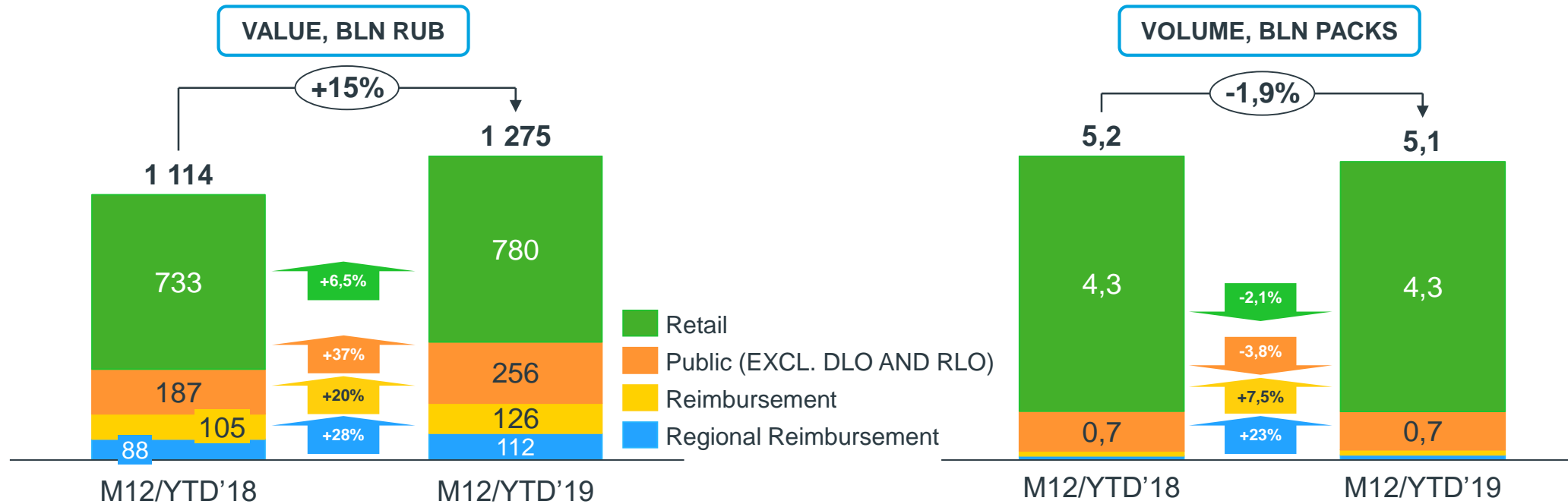
Source: IQVIA database (TRD prices)

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-December 2019

Market grew by 15% in value and decreased by 1,9% in volume

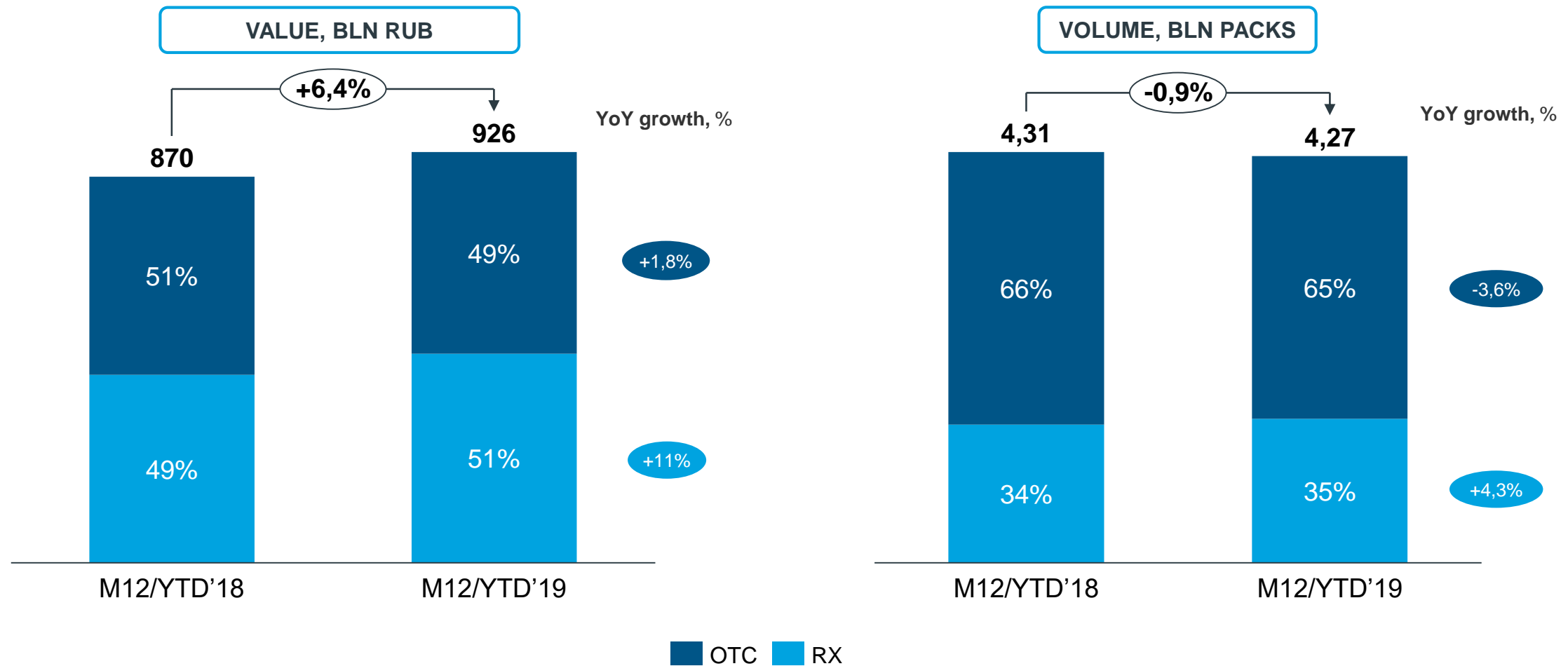


Indicator	RUB	USD	EUR	PACKS
Value M12/YTD'19, Bln.	1 275	19,7	17,6	5,1
Growth M12/YTD'19%	▲ 15%	▲ 11%	▲ 17%	▼ -1,9%



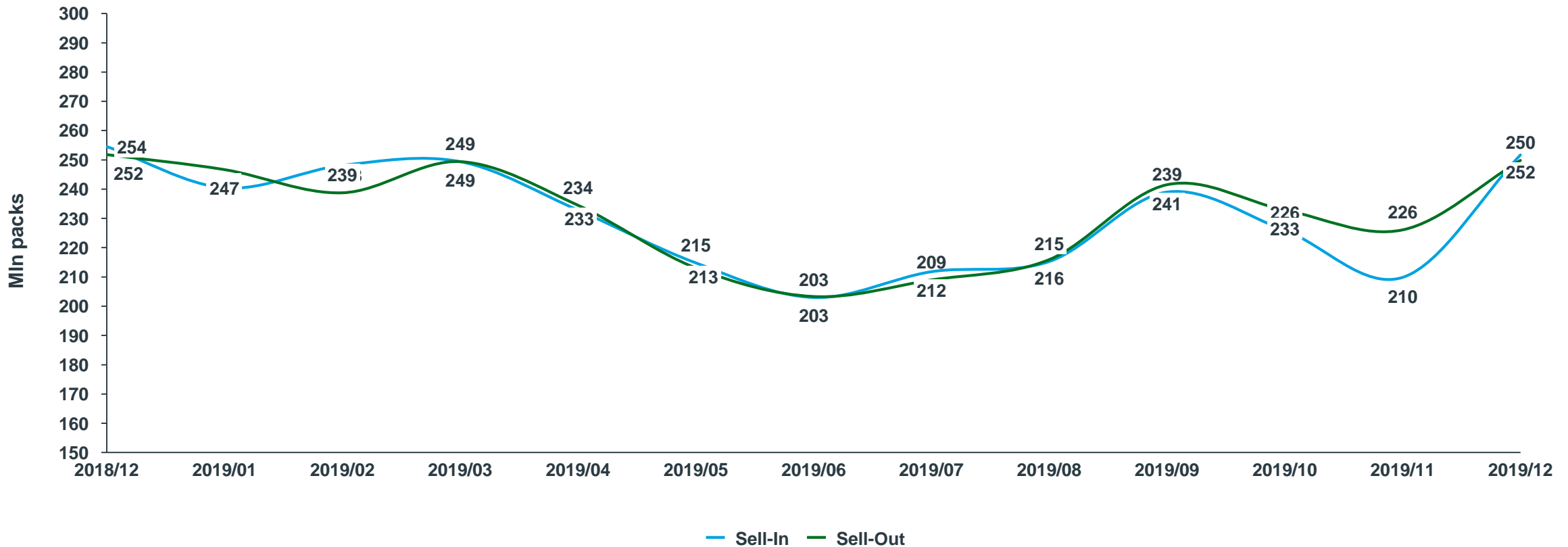
Russian pharma market growth in January-December 2019

Retail Sell-Out: Market grew by 6,4% in value and decreased by 0,9% in volume



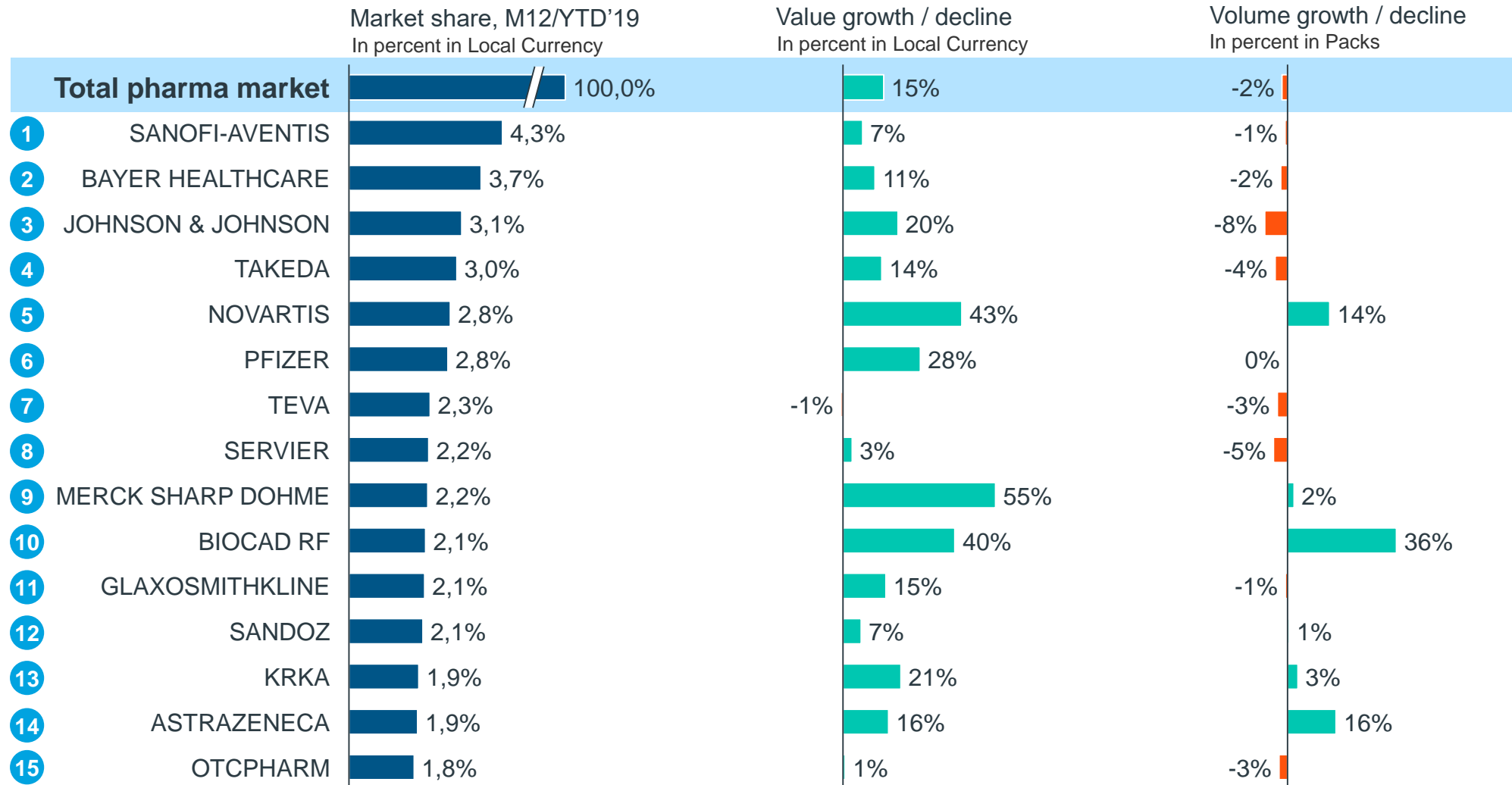


Sell-In vs Sell-Out, OTC registered drugs



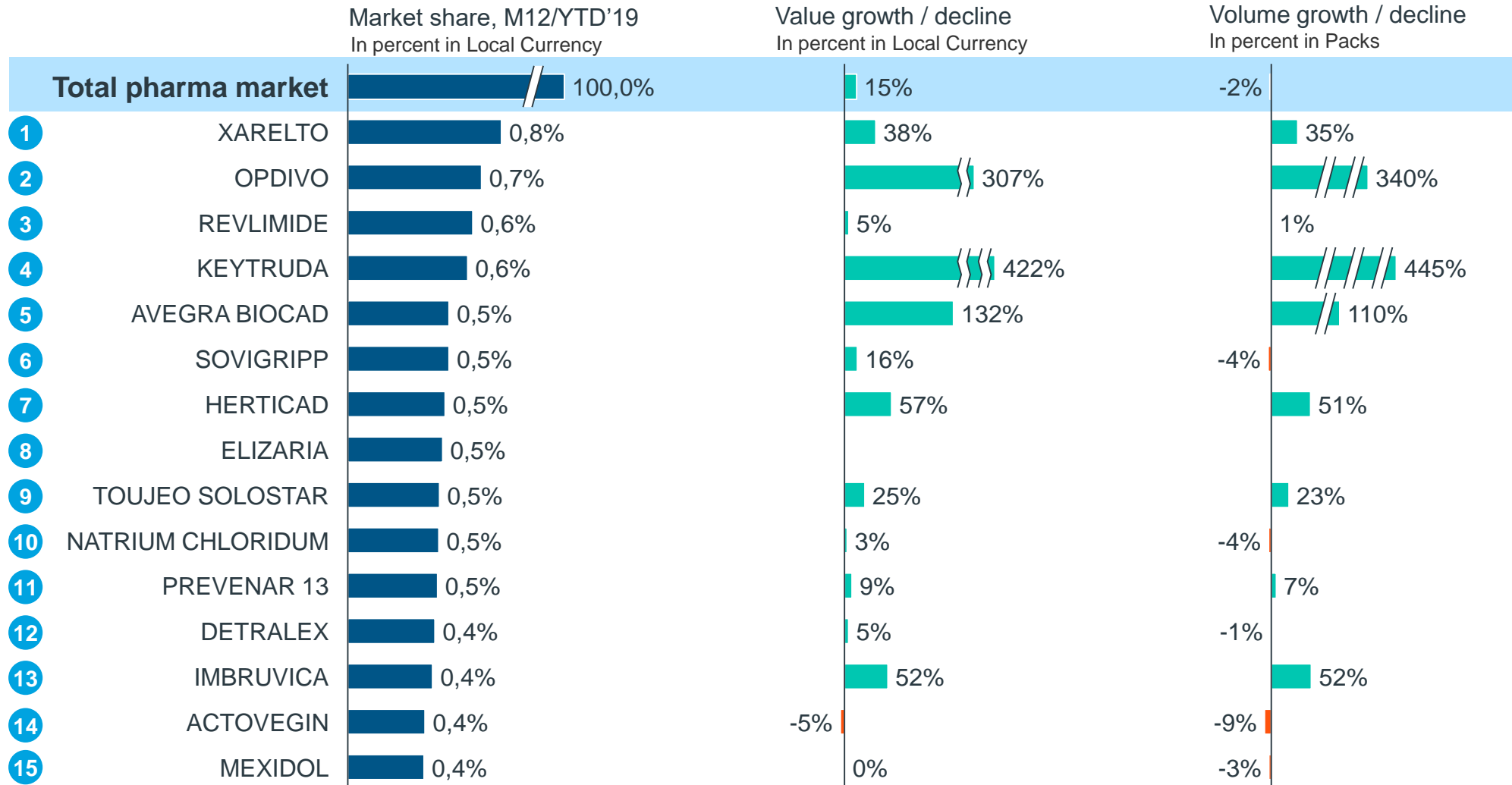


TOP-15 corporations on Russian market, January-December 2019





TOP-15 brands on Russian market, January-December 2019

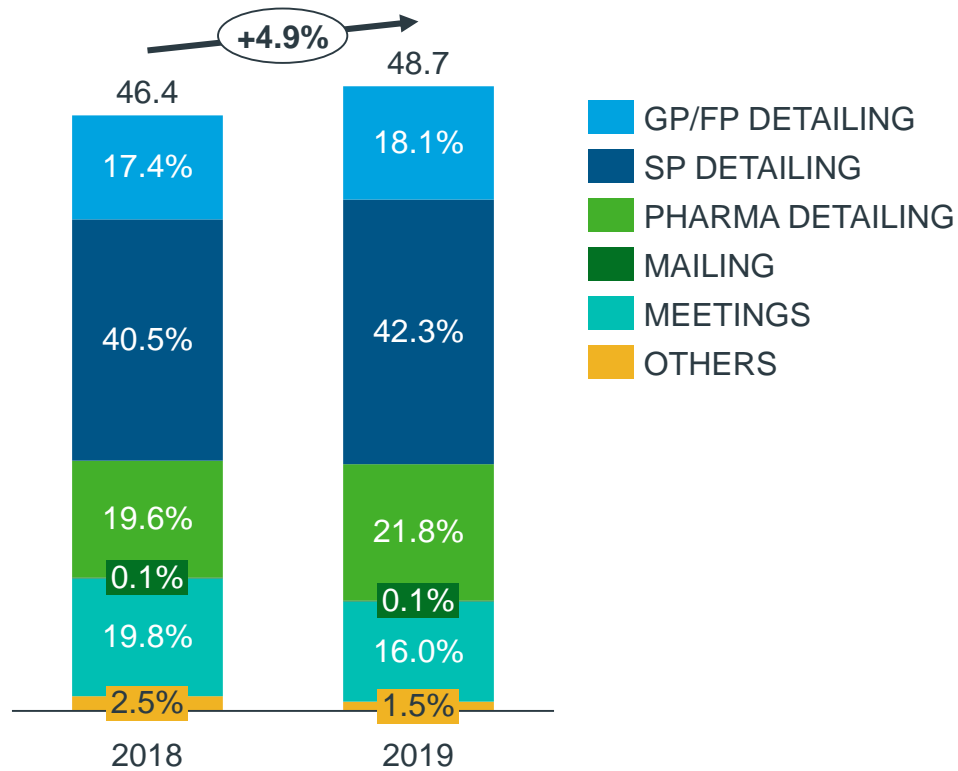


Source: IQVIA databases. Retail, Public, DLO, RLO (excluding food supplements and diagnostic agents), TRD Prices

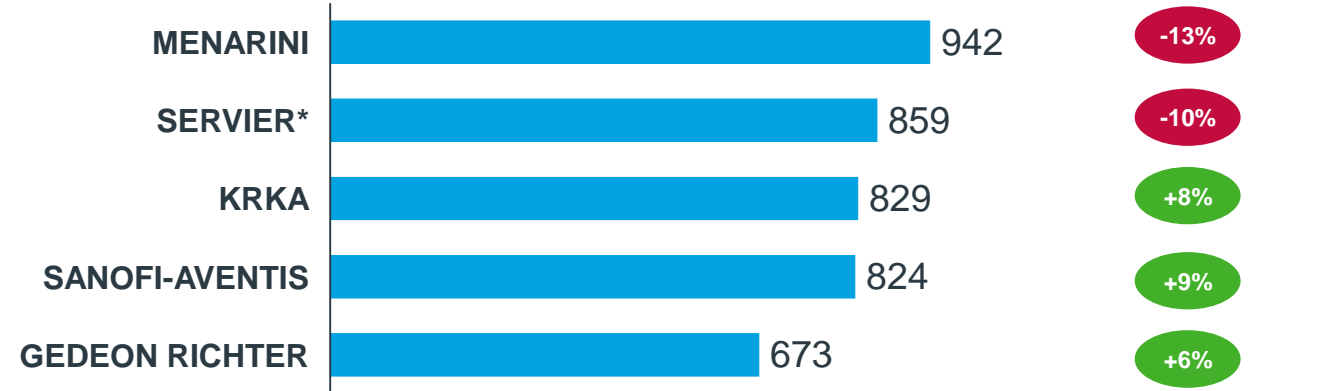
Channel Dynamics

Summary 2019

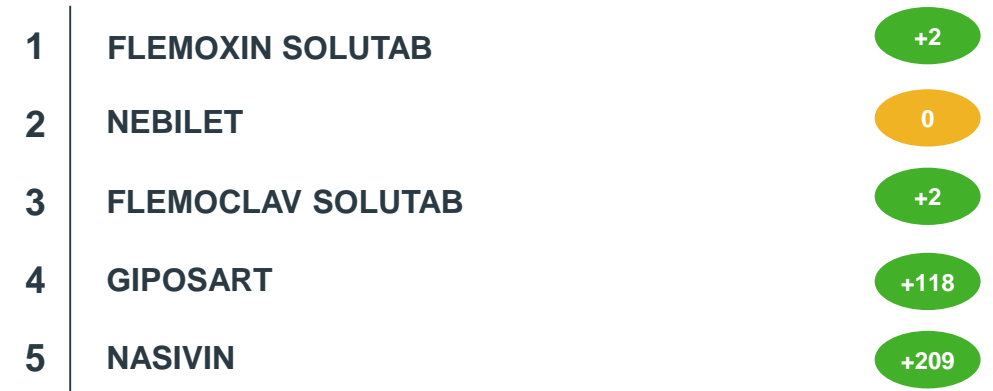
Total Spending 2019, bln Rub



TOP 5 Corporations by FTE



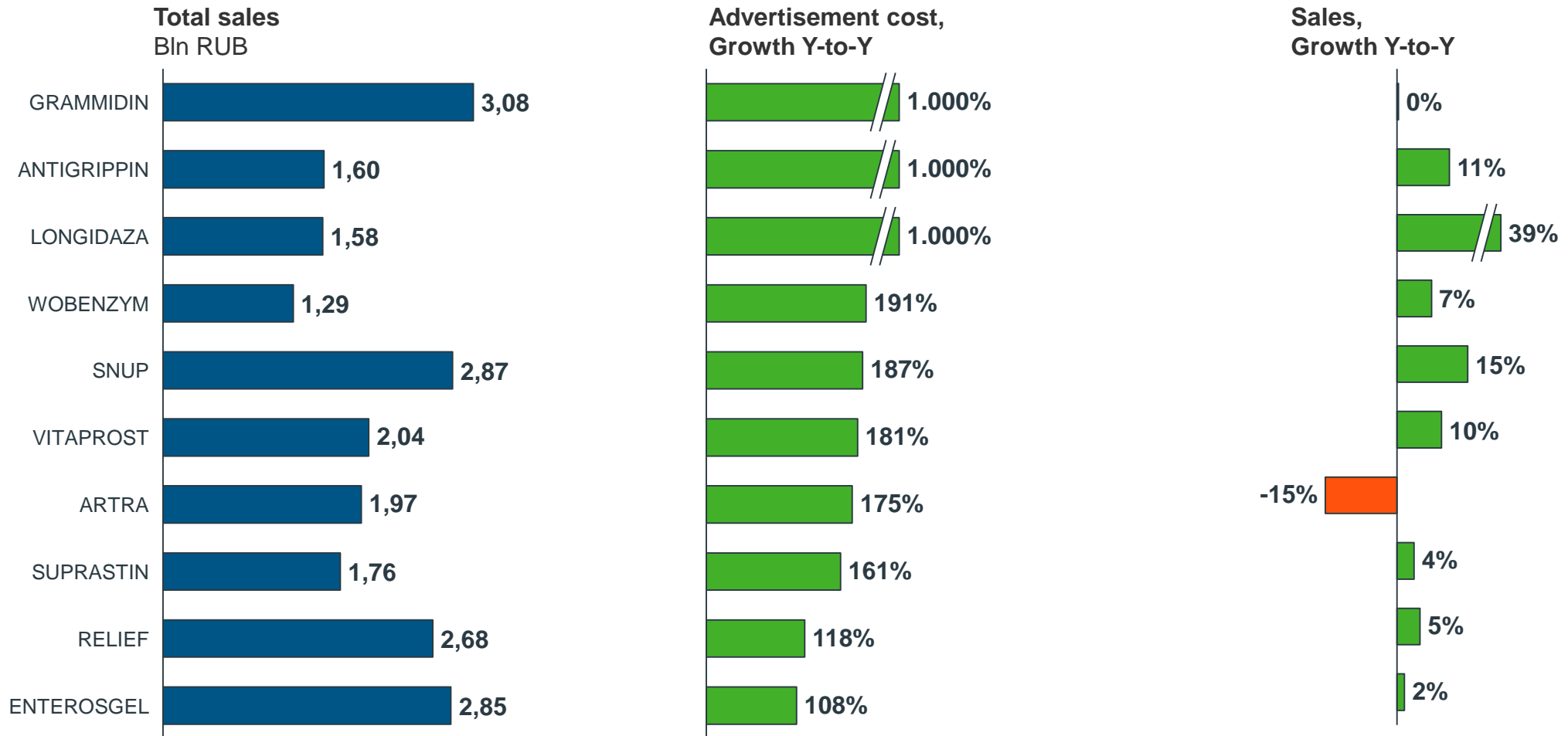
TOP 5 brands by visits



Source: Channel Dynamics™, December 2019.

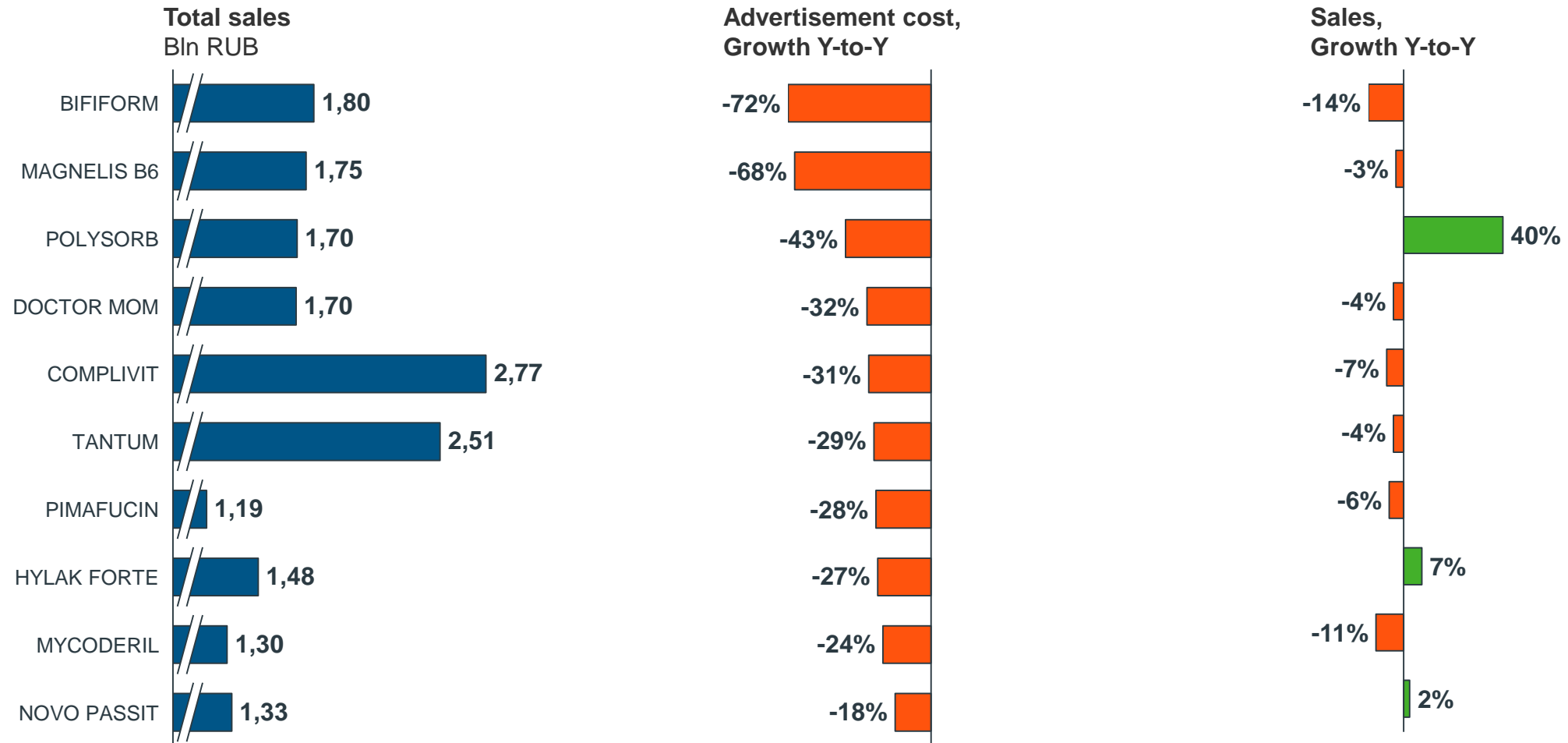
Specialties: Allergology/Pulmonology, Cardiology, Dermatology, Diabetes, E.N.T., Gastroenterology, GP, Gynecology, Neurology, Oncology, Pediatric, Pharmacy, Psychotherapy, Urology.

TOP-10 products by growth in advertisement investments in January-December 2019



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-December 2019

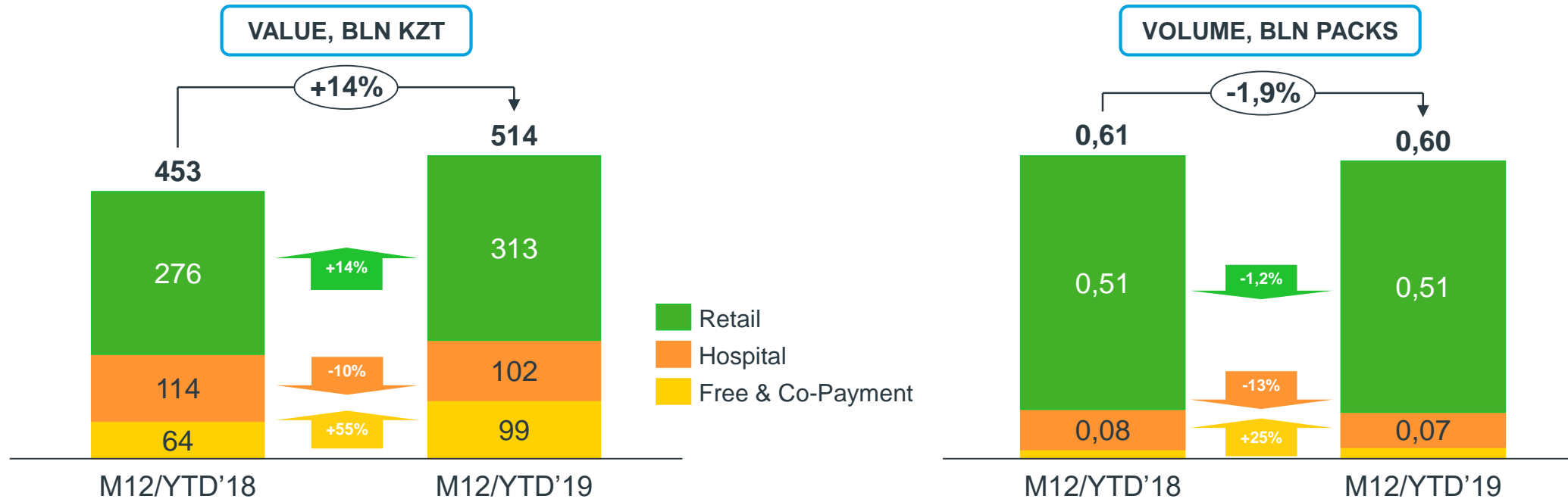


The rank is calculated among TOP-200 Brands by sales with advertising cost greater than 50 mln RUB
 Source: IQVIA databases. Pharamtrend, Mediascope data, FIN Prices



Kazakhstan pharma market growth in January-December 2019

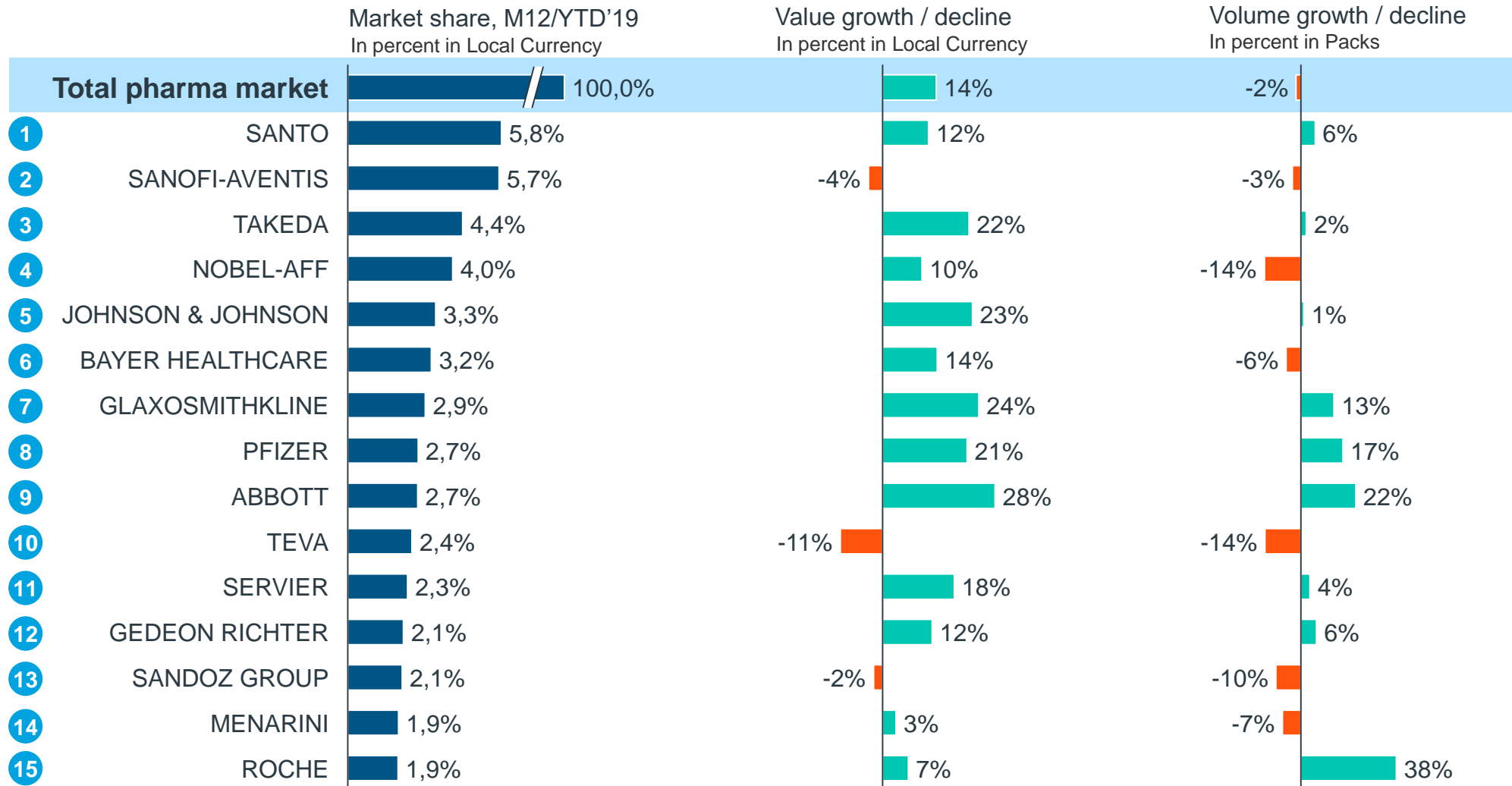
Market grew by 14% in value and decreased by 1,9% in volume



Indicator	KZT	USD	EUR	PACKS
Value M12/YTD'19, Bln.	514	1,34	1,20	0,60
Growth M12/YTD'19%	▲ 14%	▲ 2,2%	▲ 7,9%	▼ -1,9%

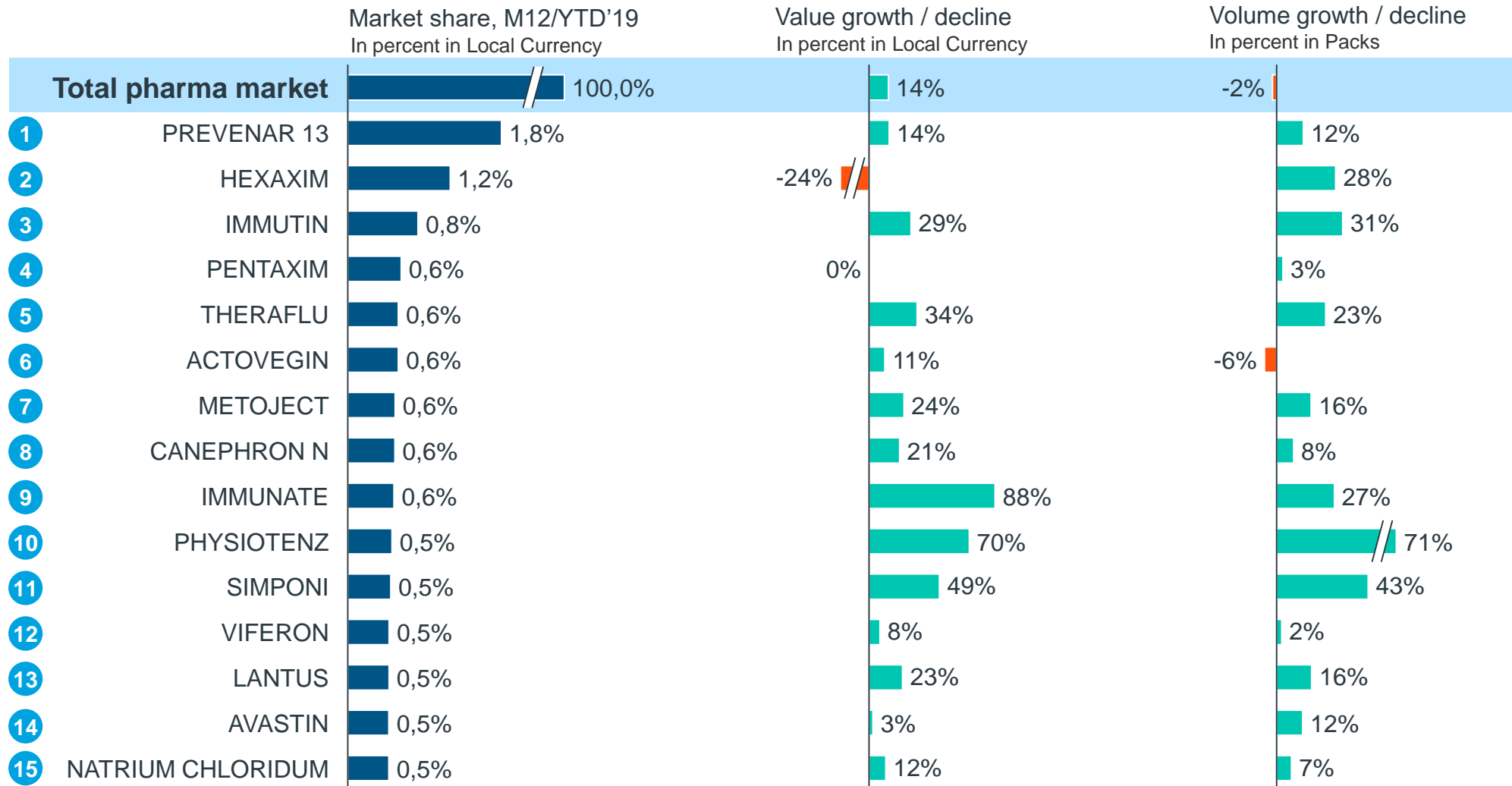


TOP-15 corporations on Kazakhstan market, January-December 2019





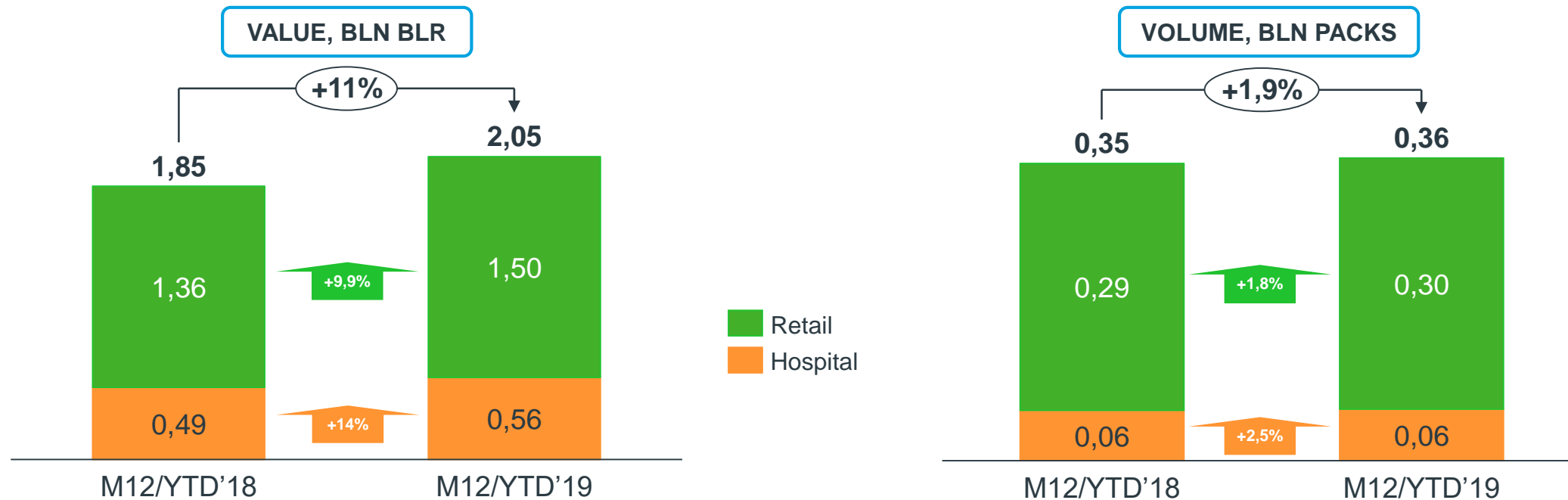
TOP-15 brands on Kazakhstan market, January-December 2019





Belarus pharma market growth in January-December 2019

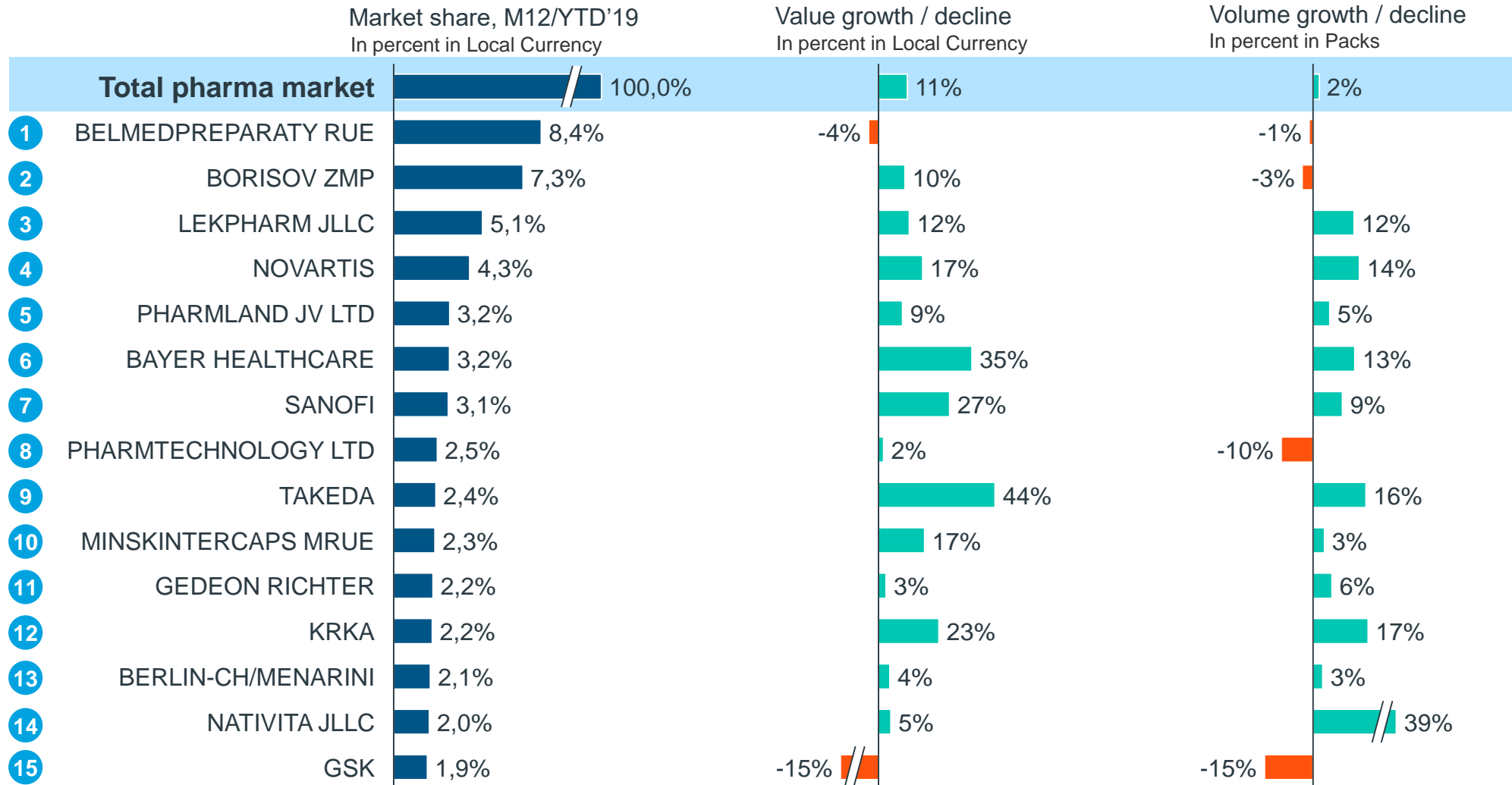
Market grew by 11% in value and by 1,9% in volume



Indicator	BLR	USD	EUR	PACKS
Value M12/YTD'19, Bln.	2,05	0,98	0,88	0,36
Growth M12/YTD'19%	▲ 11%	▲ 8,0%	▲ 14%	▲ 1,9%

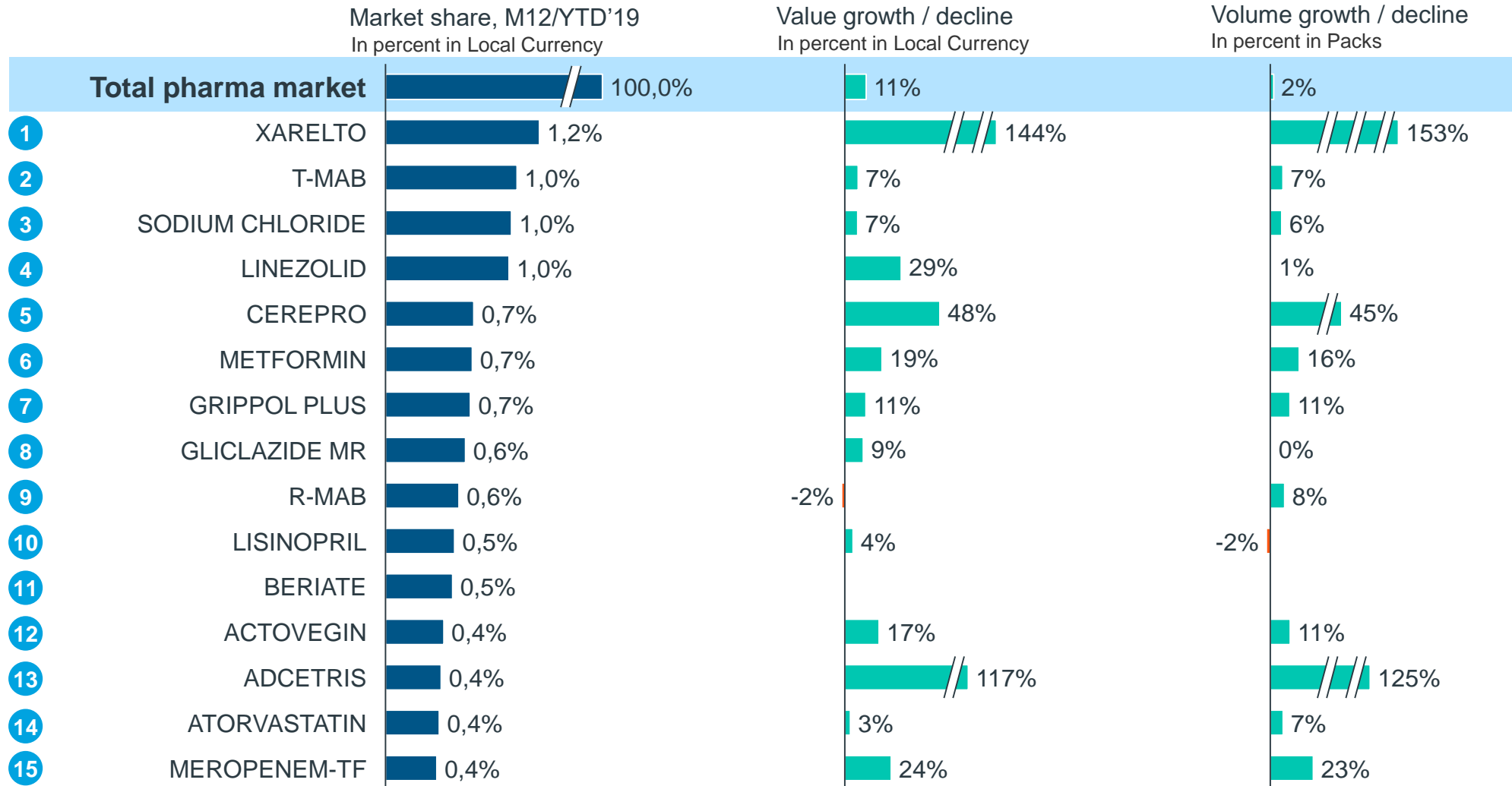


TOP-15 corporations on Belarus market, January-December 2019





TOP-15 brands on Belarus market, January-December 2019

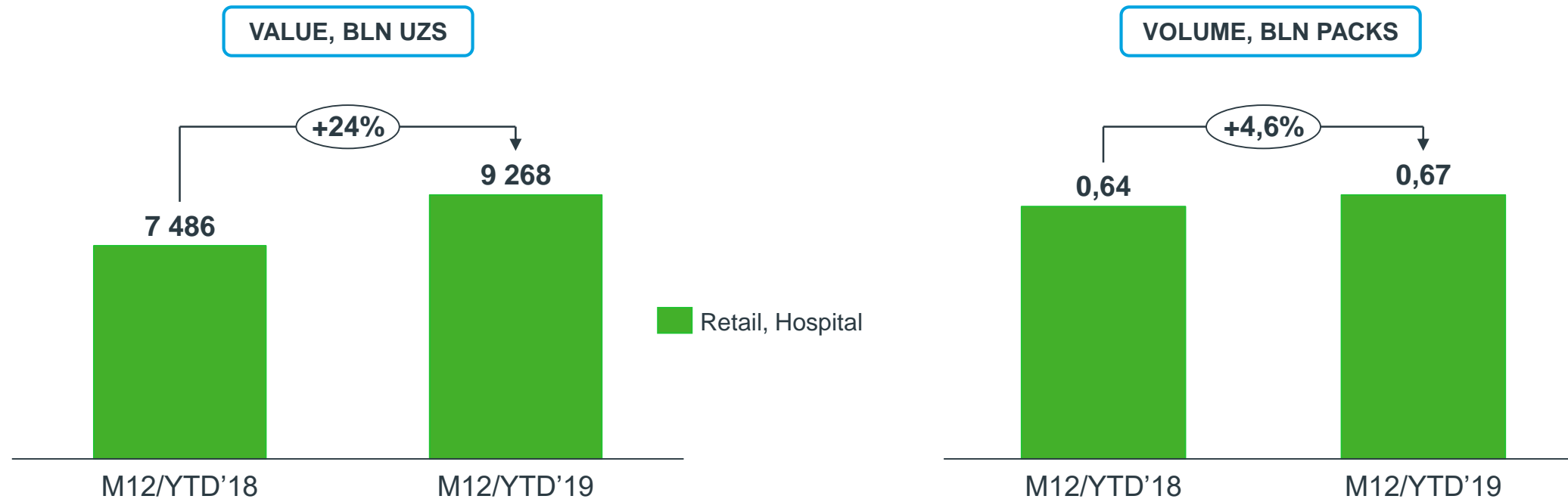


Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices



Uzbekistan pharma market growth in January-December 2019

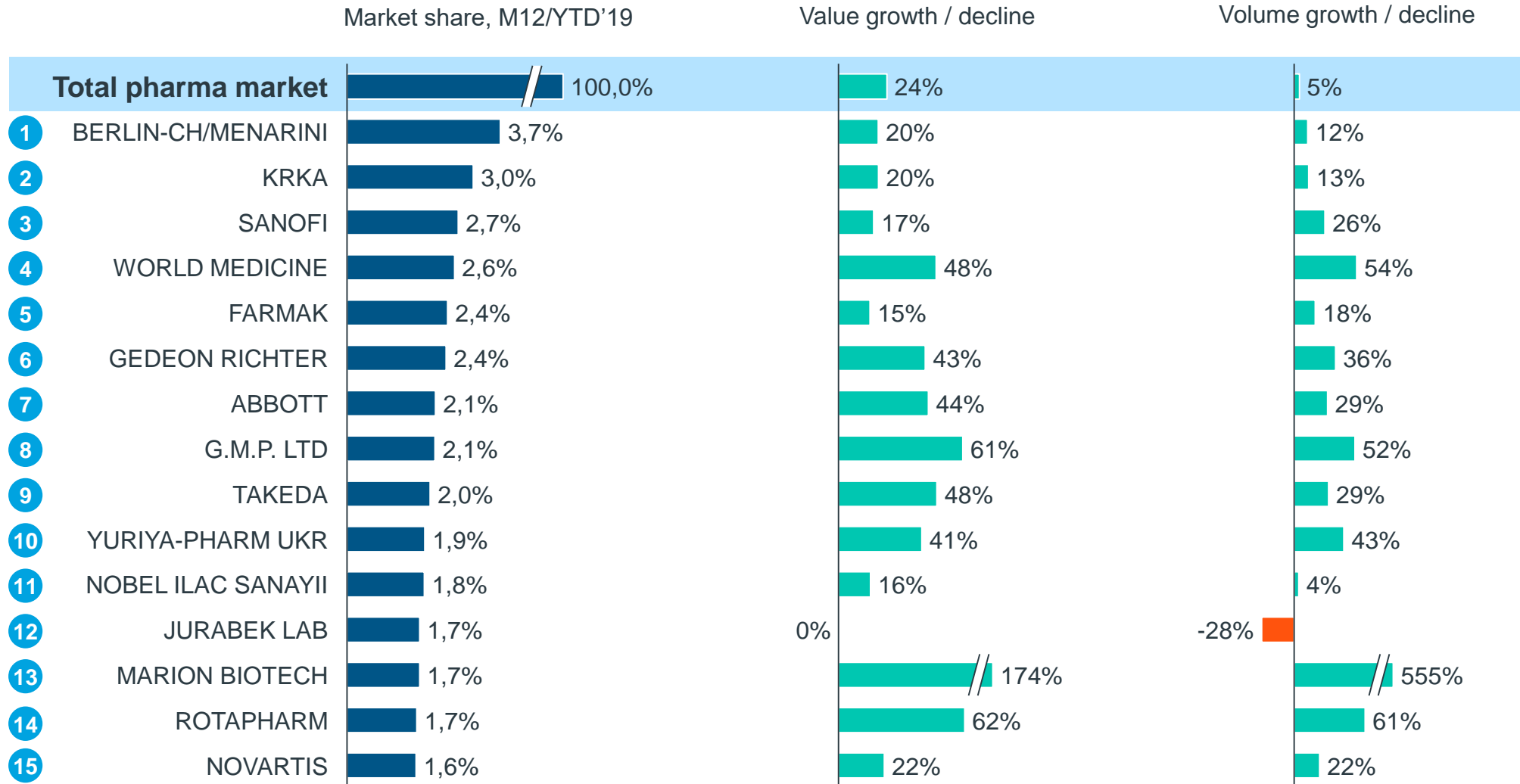
Market grew by 24% in value and by 4,6% in volume



Indicator	UZS	USD	EUR	PACKS
Value M12/YTD'19, Bln.	9 268	1,06	0,95	0,67
Growth M12/YTD'19%	▲ 24%	▲ 14%	▲ 20%	▲ 4,6%



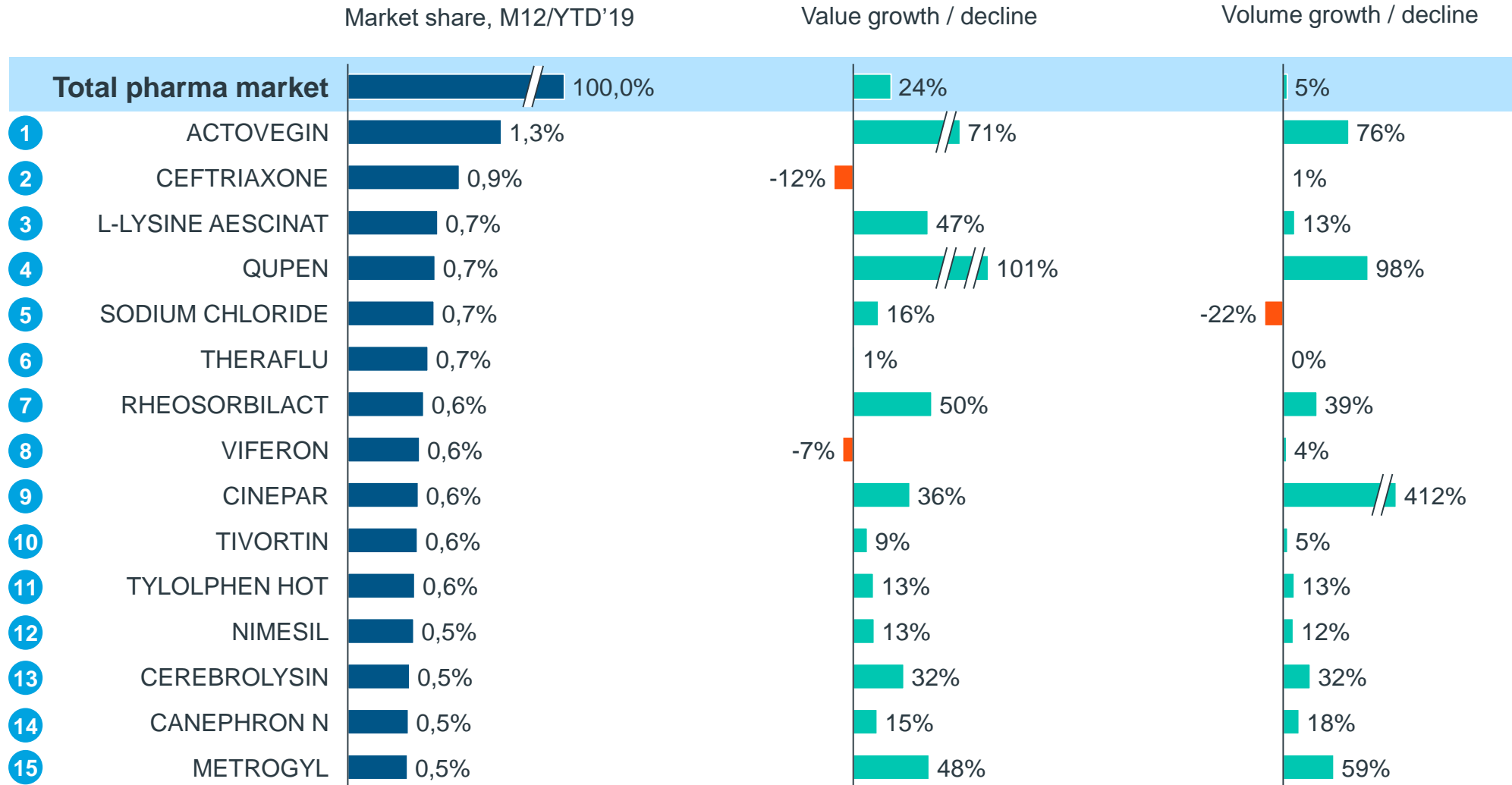
TOP-15 corporations on Uzbekistan market, January-December 2019



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



TOP-15 brands on Uzbekistan market, January-December 2019

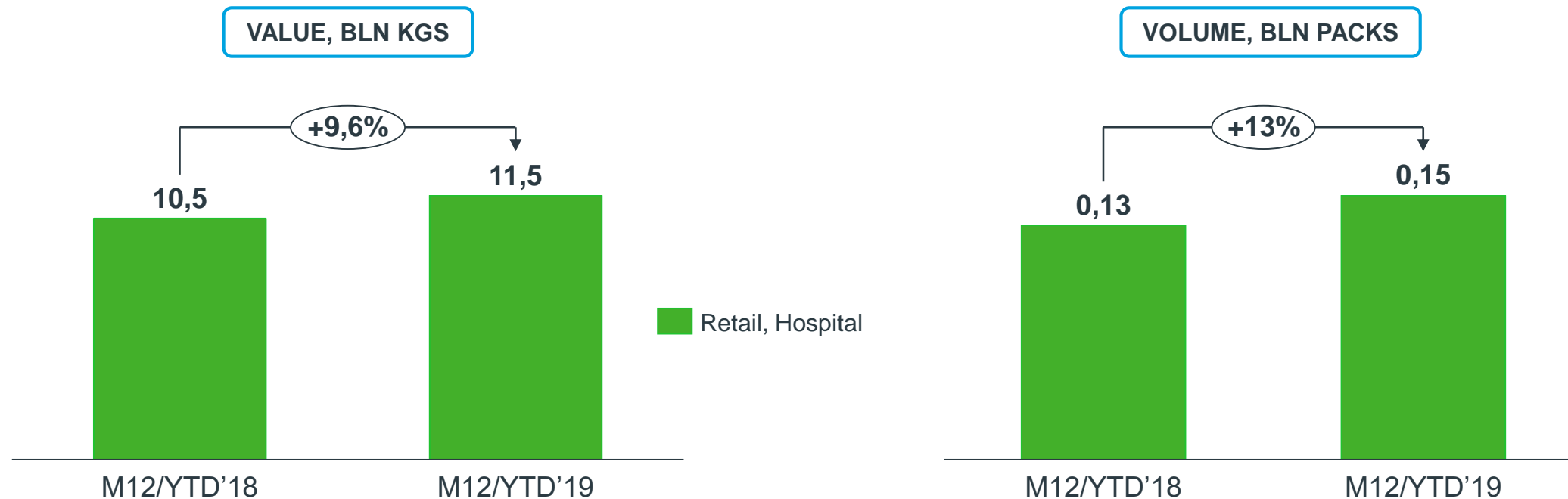


Source: IQVIA databases. Retail and Hospital Market (exclude food supplements and diagnostic agents), TRD Prices



Kyrgyzstan pharma market growth in January-December 2019

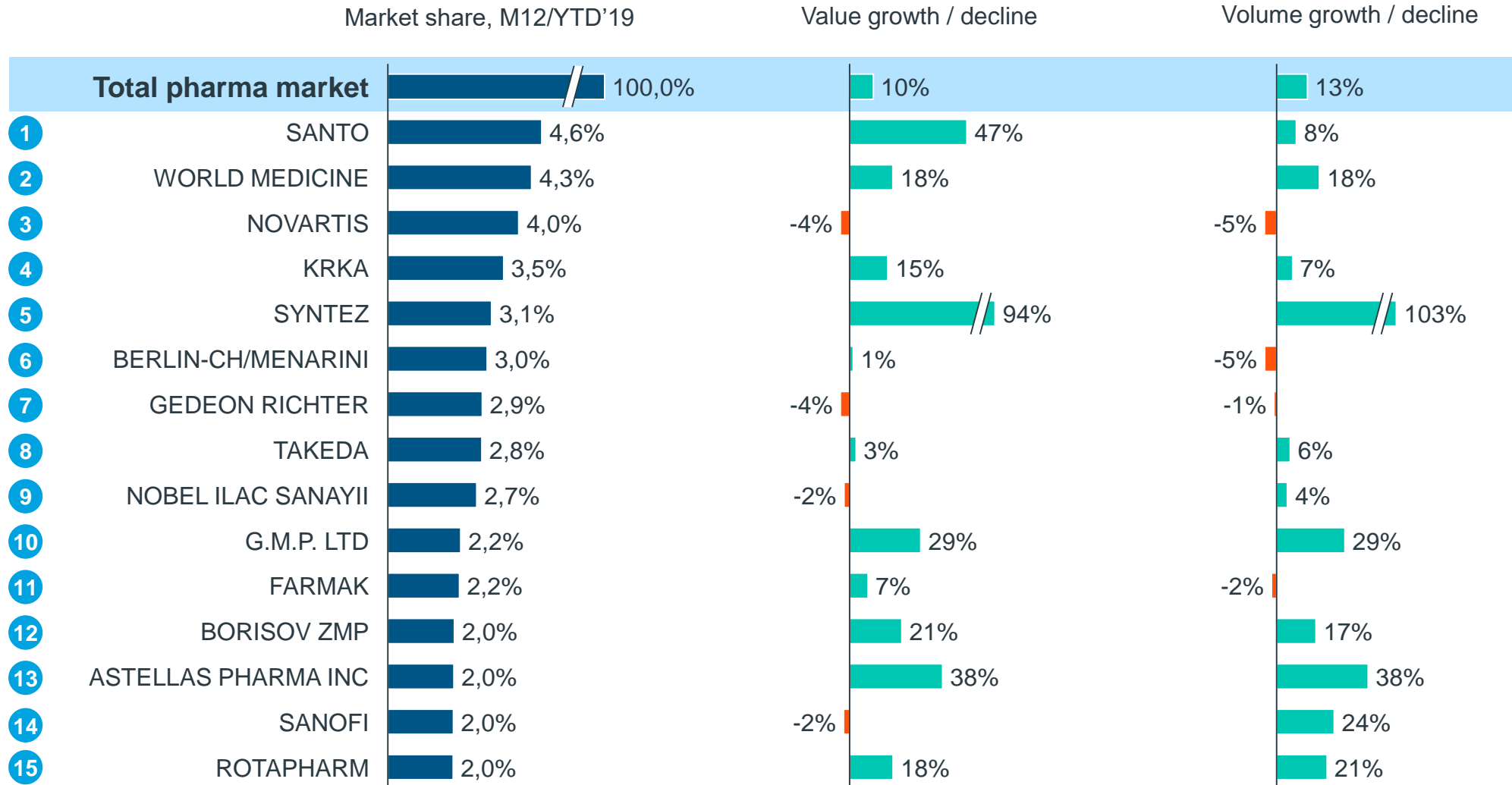
Market grew by 9,6% in value and by 13% in volume



Indicator	KGS	USD	EUR	PACKS
Value M12/YTD'19, Bln.	11,5	0,16	0,15	0,15
Growth M12/YTD'19%	▲ 9,6%	▲ 8,2%	▲ 14%	▲ 13%

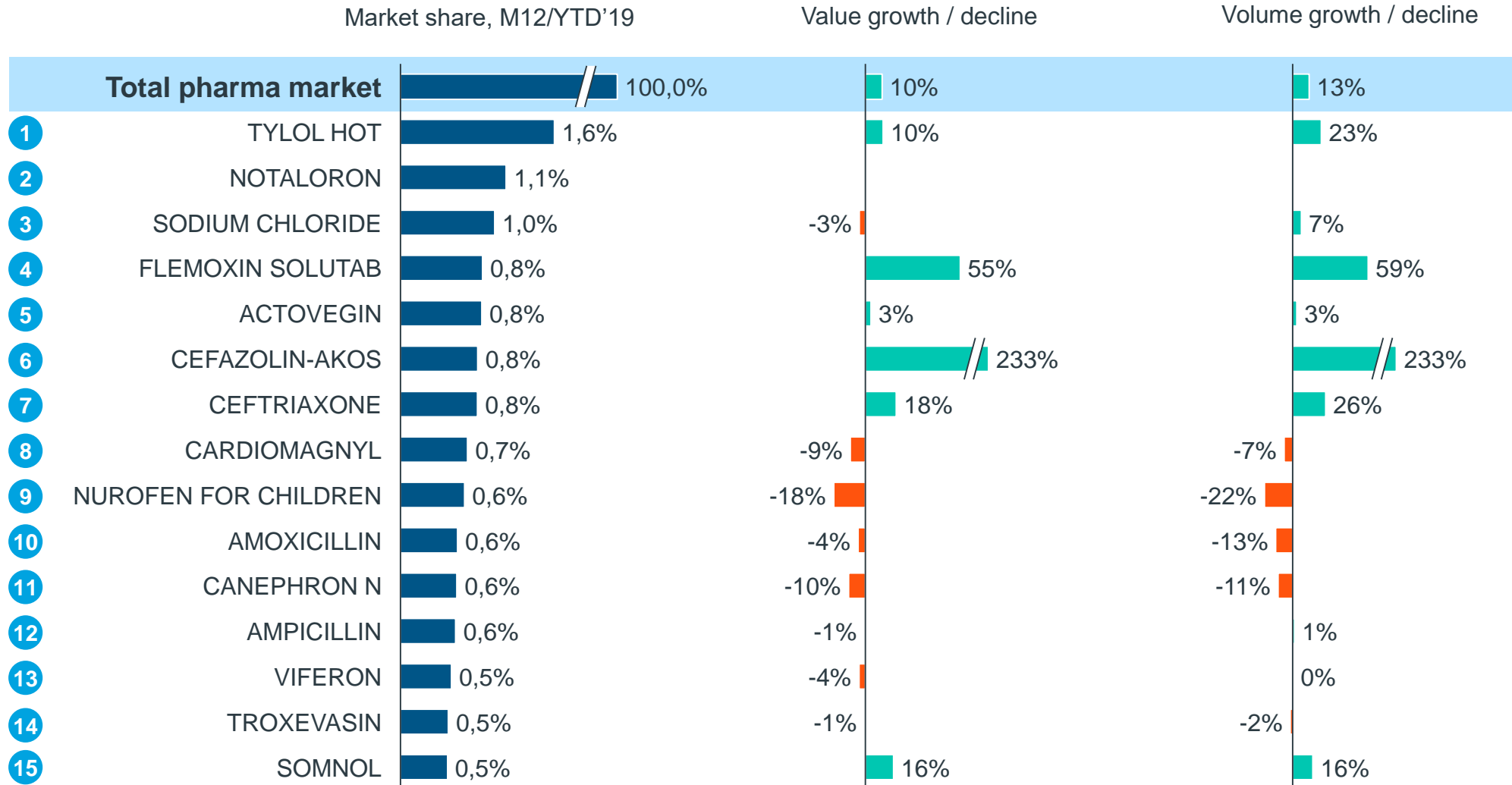


TOP-15 corporations on Kyrgyzstan market, January-December 2019





TOP-15 brands on Kyrgyzstan market, January-December 2019

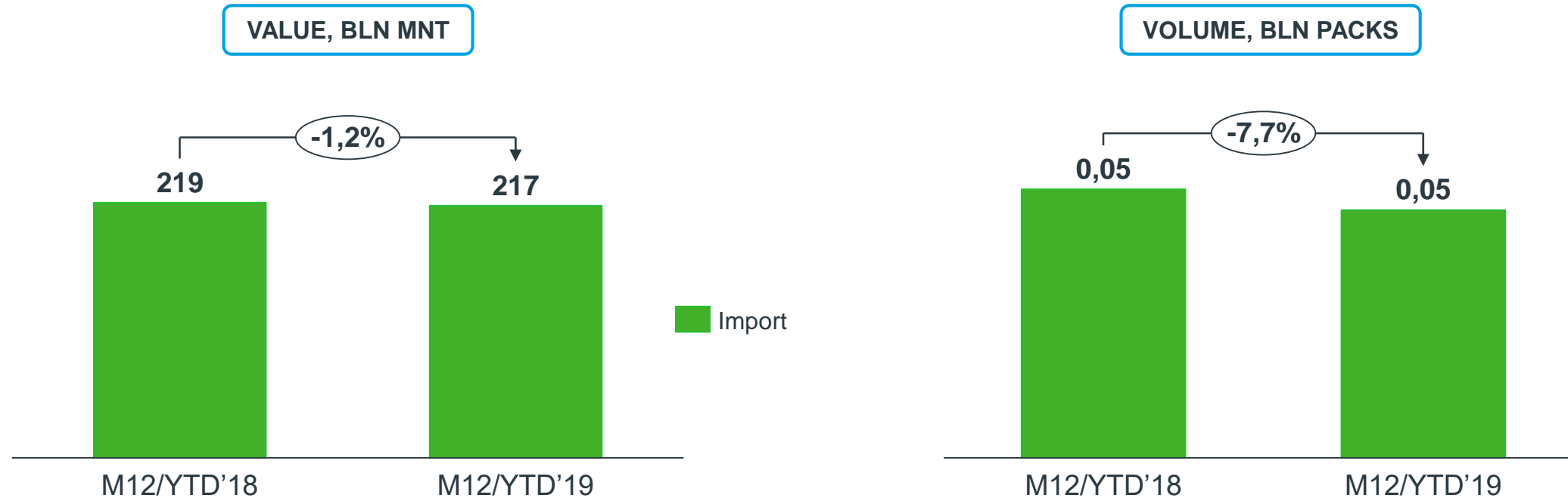


Source: IQVIA databases. Retail and Hospital Market (exclude food supplements and diagnostic agents), TRD Prices



Mongolian pharma market growth in January-December 2019

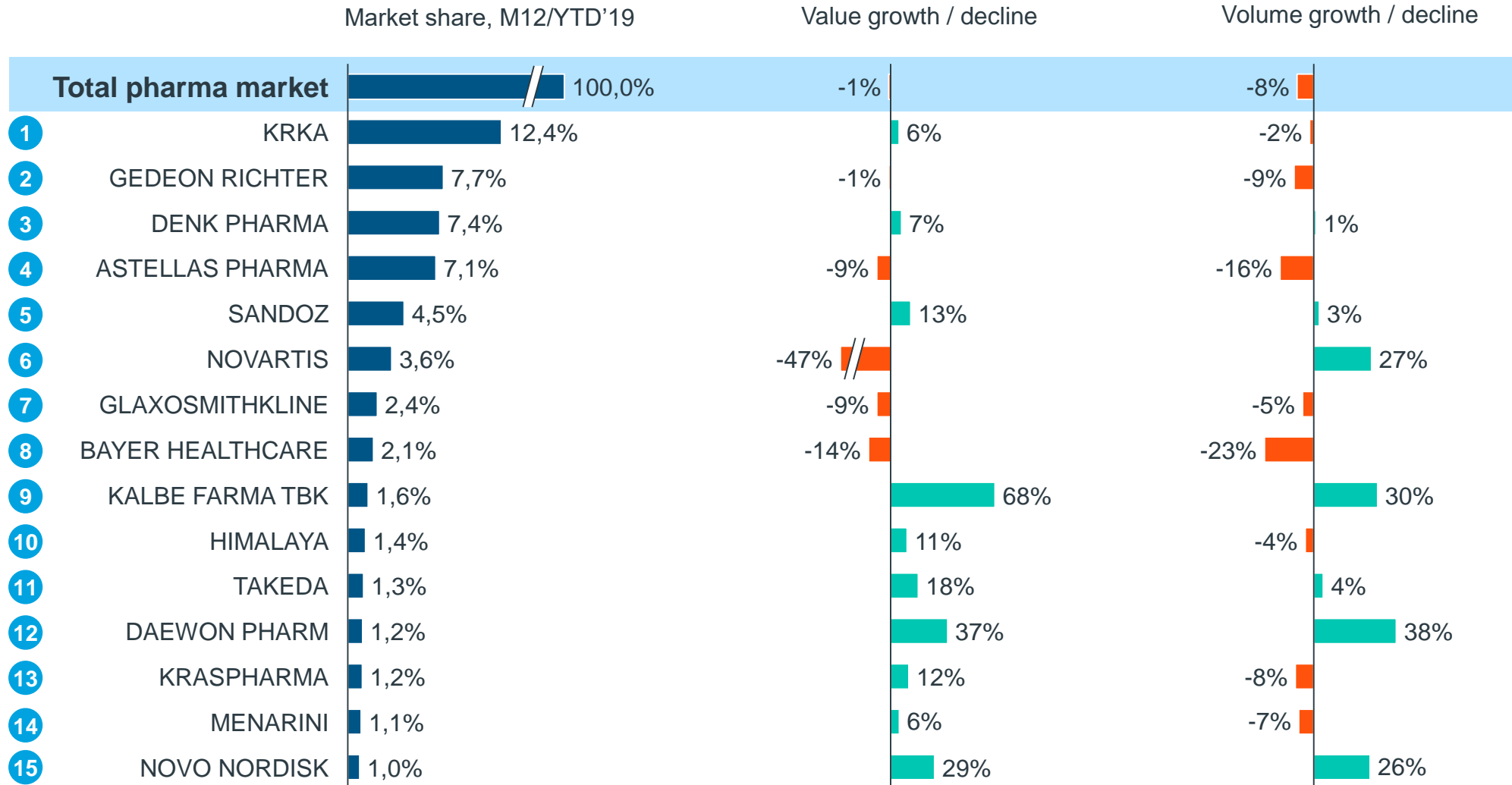
Market decreased by 1,2% in value and by 7,7% in volume



Indicator	MNT	USD	EUR	PACKS
Value M12/YTD'19, Bln.	217	0,08	0,07	0,05
Growth M12/YTD'19%	▼ -1,2%	▼ -8,1%	▼ -3,3%	▼ -7,7%



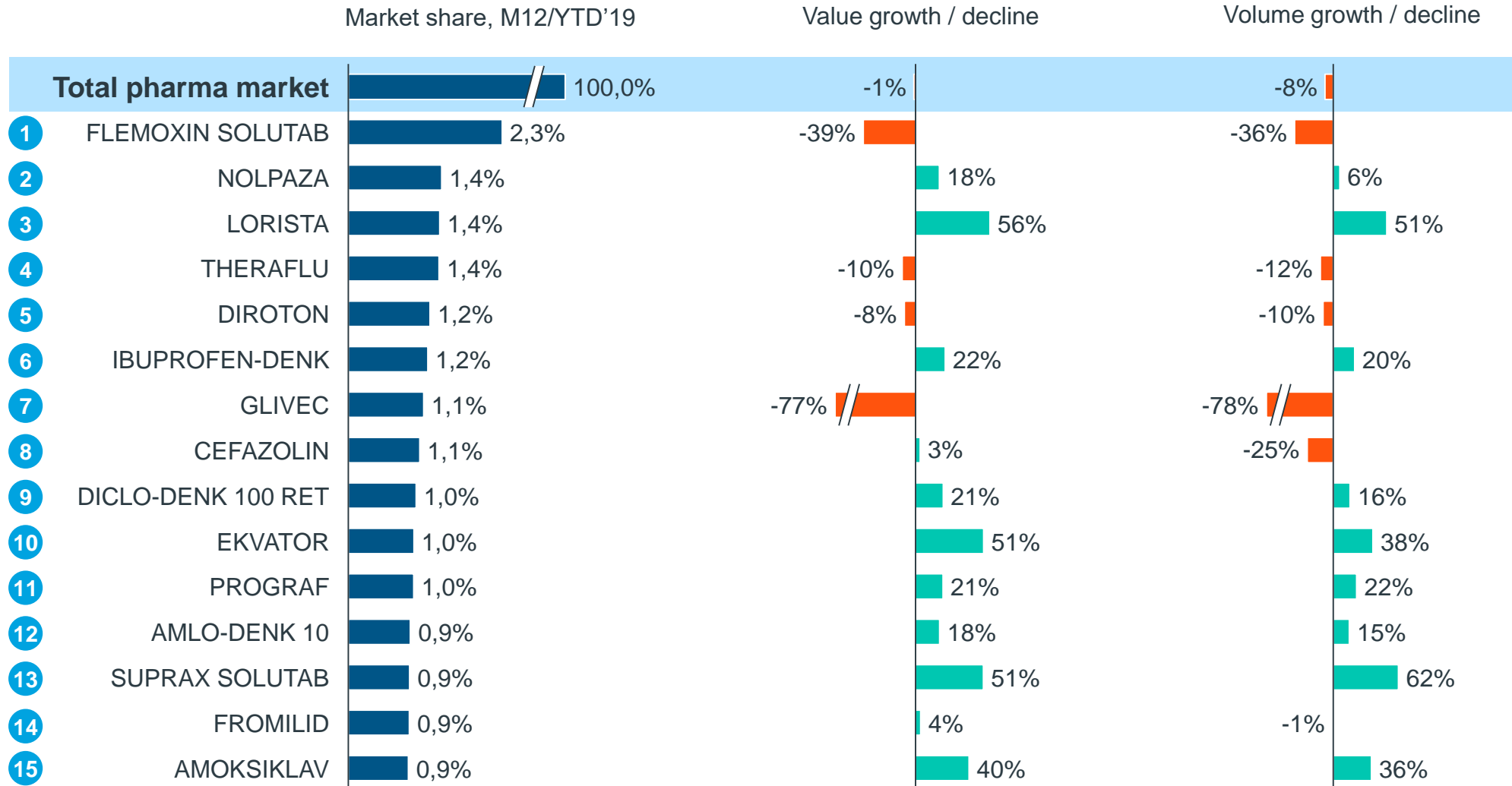
TOP-15 corporations on Mongolian market, January-December 2019



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



TOP-15 brands on Mongolian market, January-December 2019



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

Please Contact Us for More Information



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