



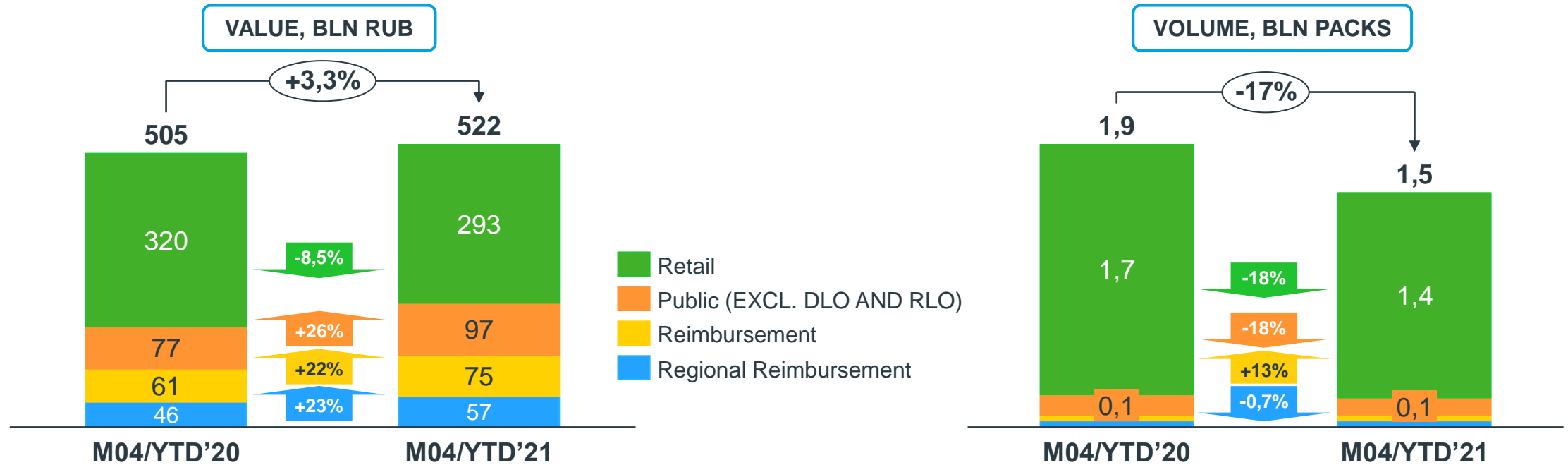
Facts from IQVIA

M04 2021



Russian pharma market growth in January-April 2021

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

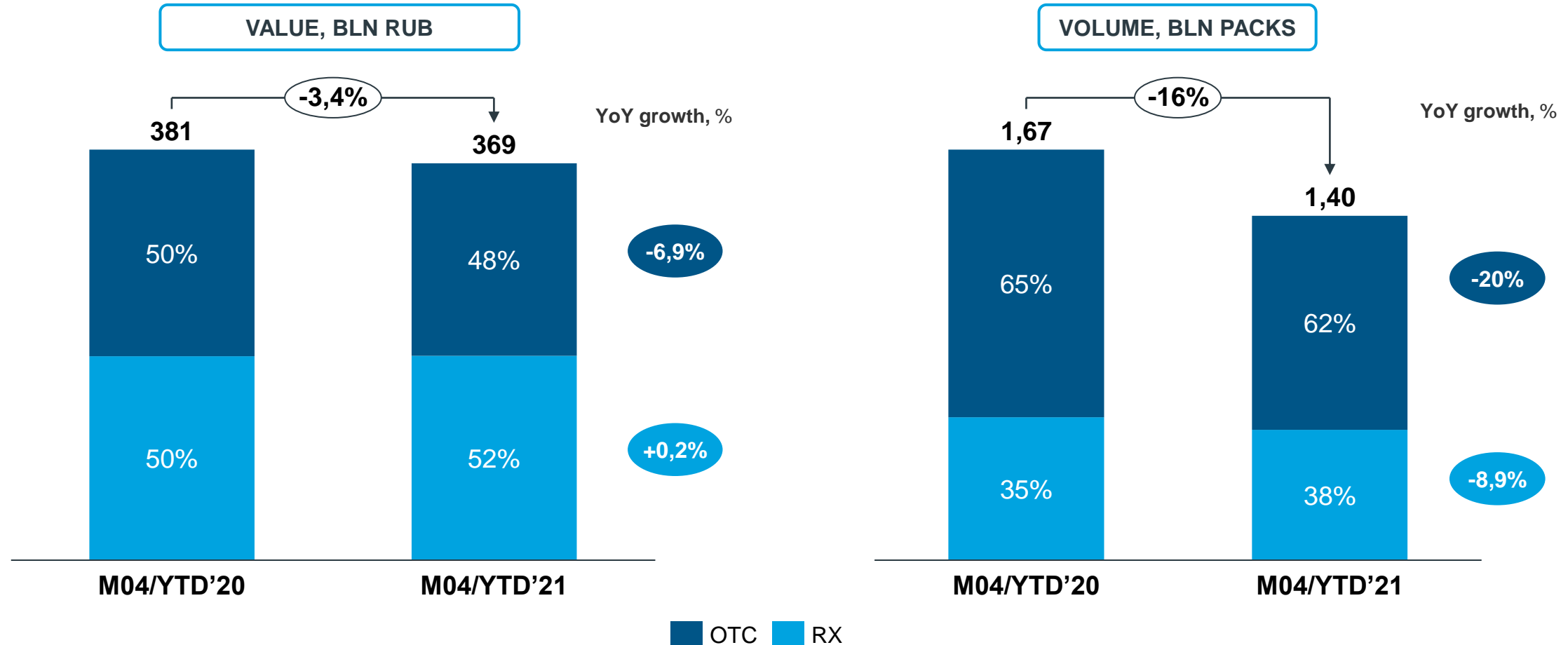


Indicator	RUB	USD	EUR	PACKS
Value M04/YTD'21, Bln.	522	7,0	5,8	1,5
Growth M04/YTD'21, %	▲ 3,3%	▼ -5,1%	▼ -13%	▼ -17%



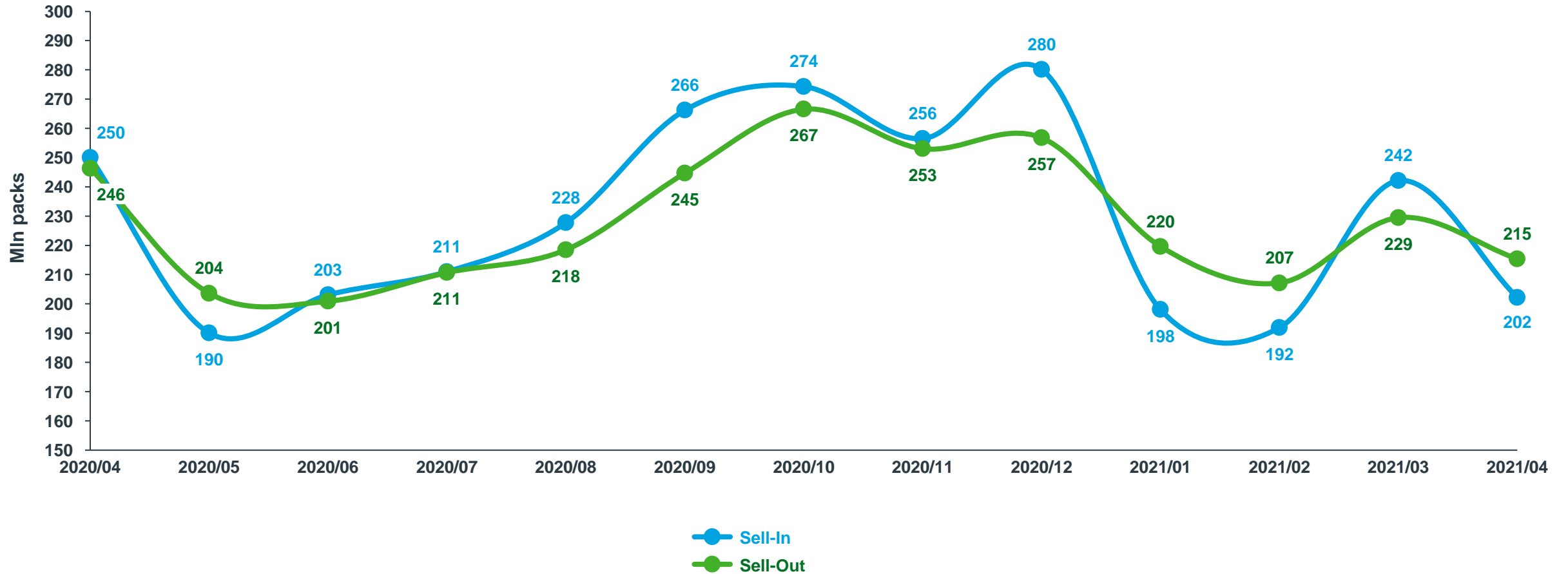
Russian pharma market growth in January-April 2021

Retail Sell-Out: Market decreased by 3,4% in value and by 16% in volume



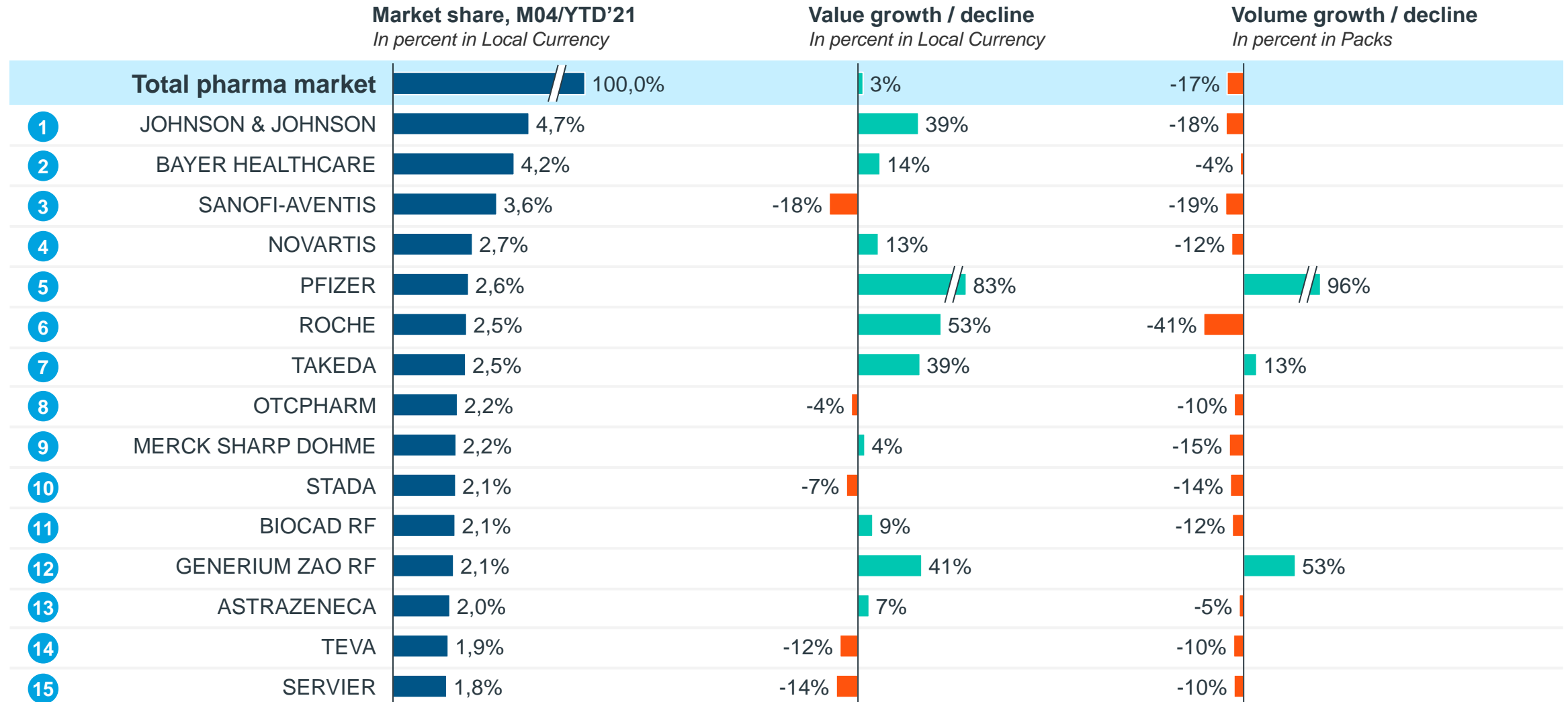


Sell-In vs Sell-Out, OTC registered drugs



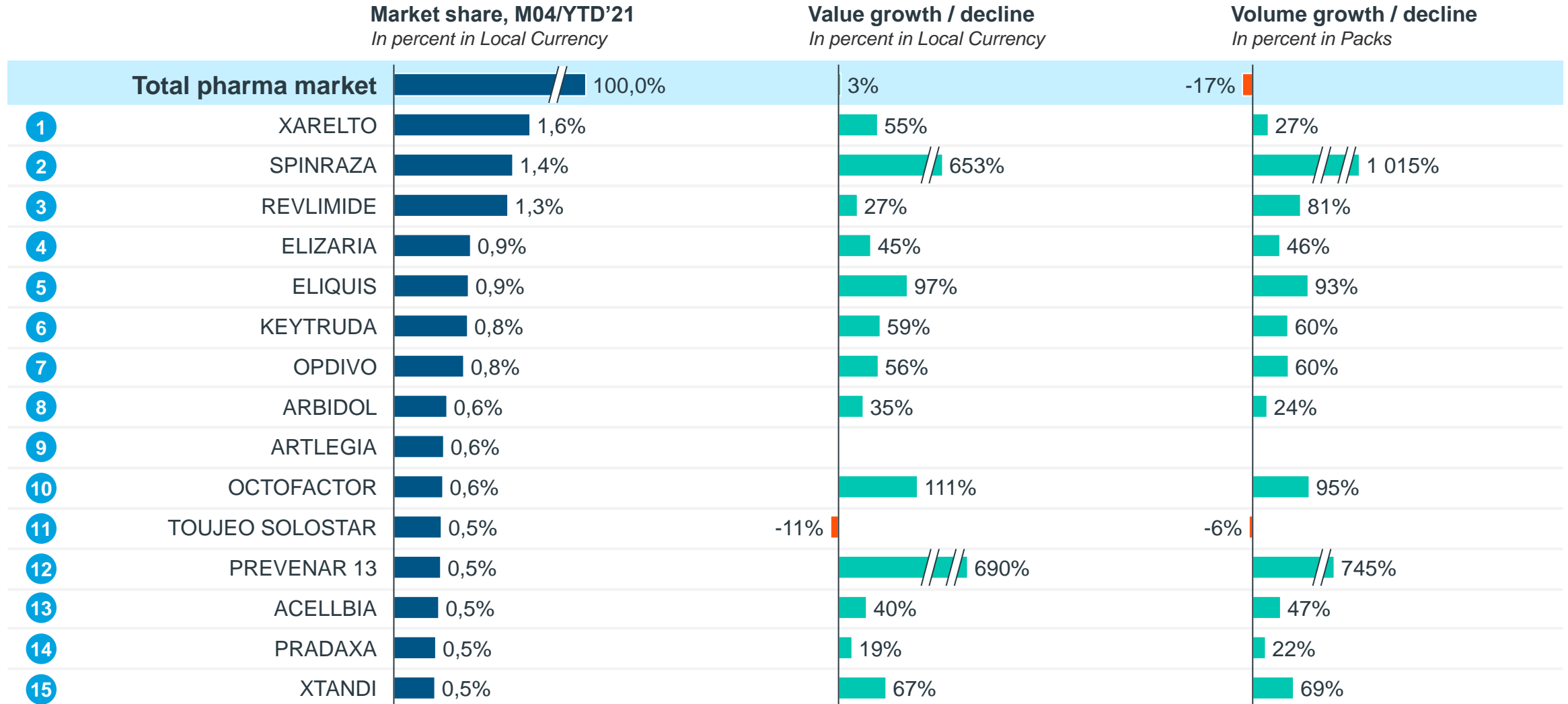


TOP-15 corporations on Russian market, January-April 2021

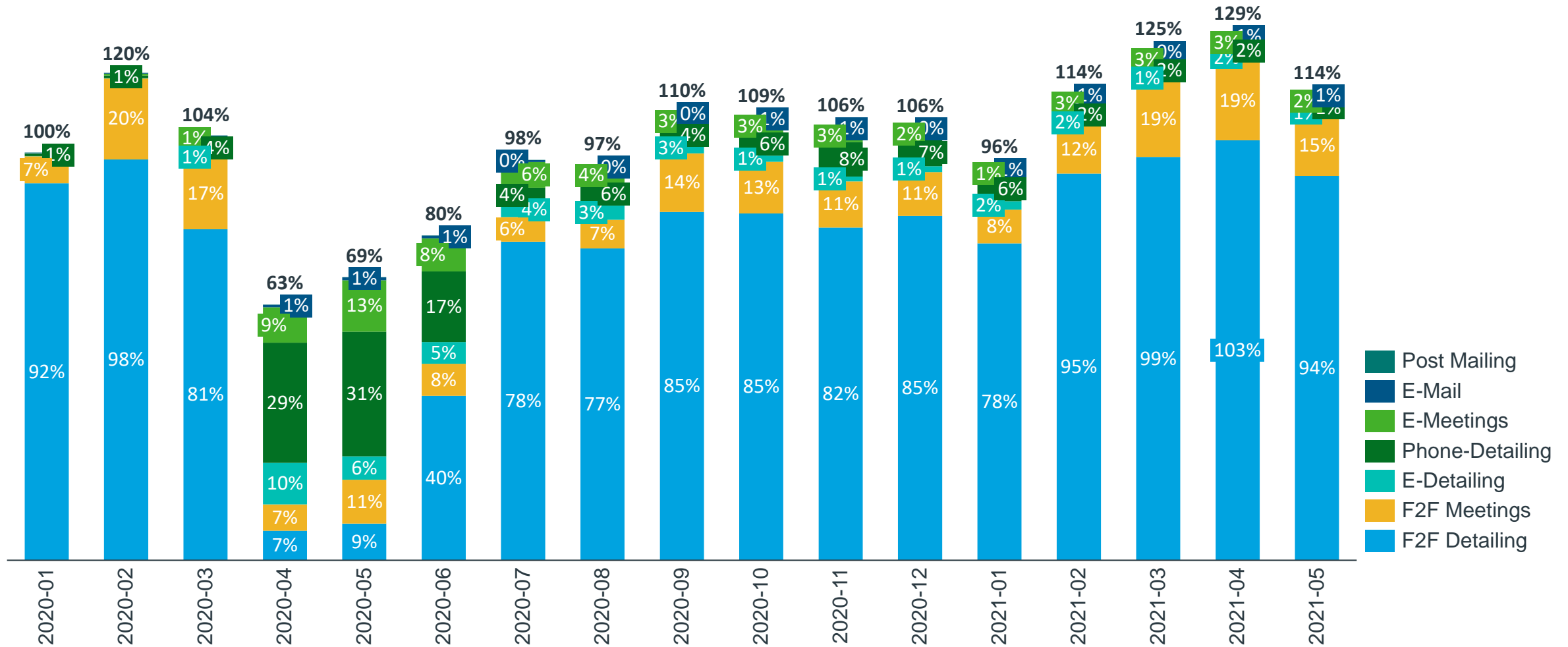




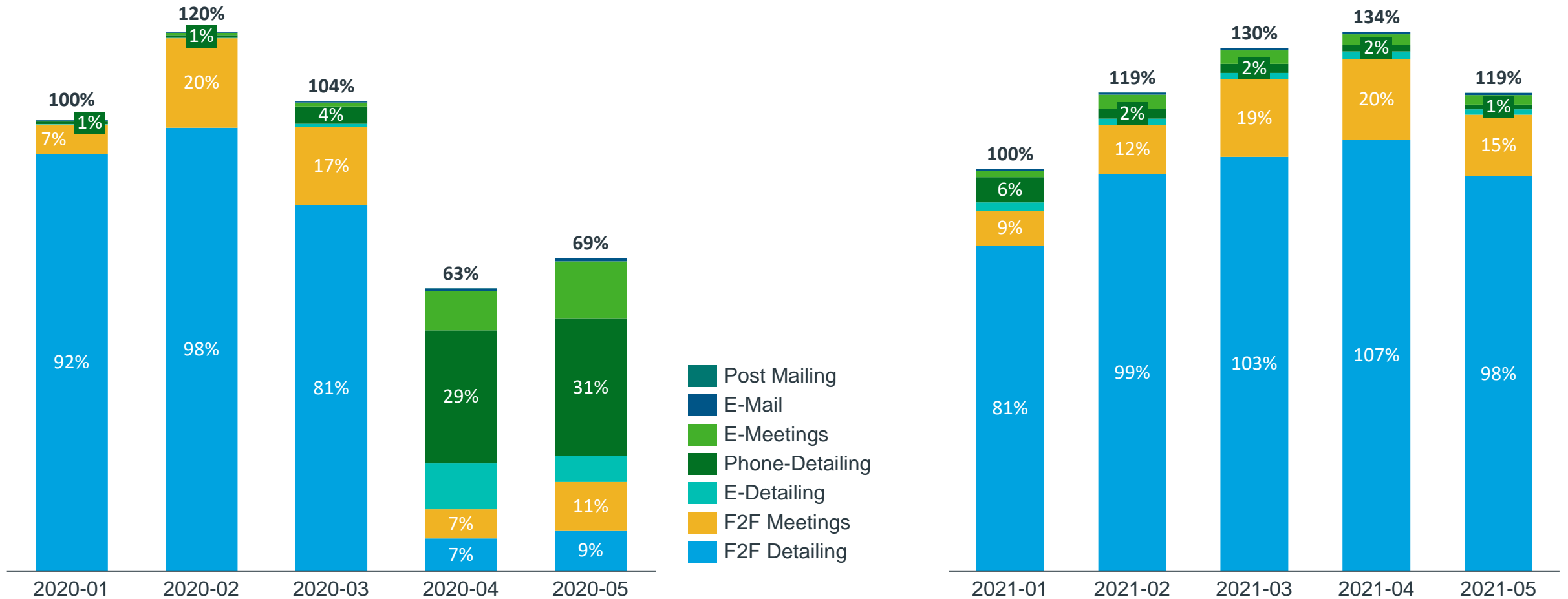
TOP-15 brands on Russian market, January-April 2021



Index of promotional interactions by channel in Russia, January 2020 - May 2021

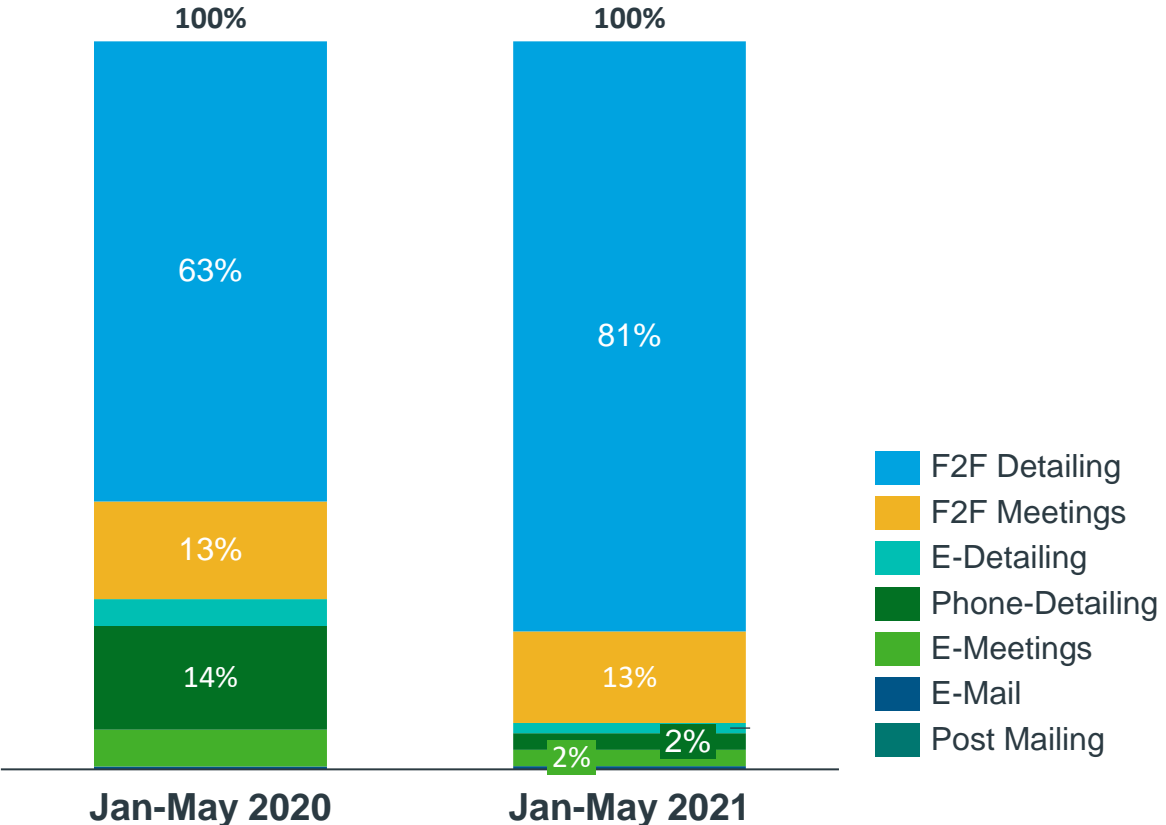


Index of promotional interactions by channel in Russia, January-May 2020 & 2021

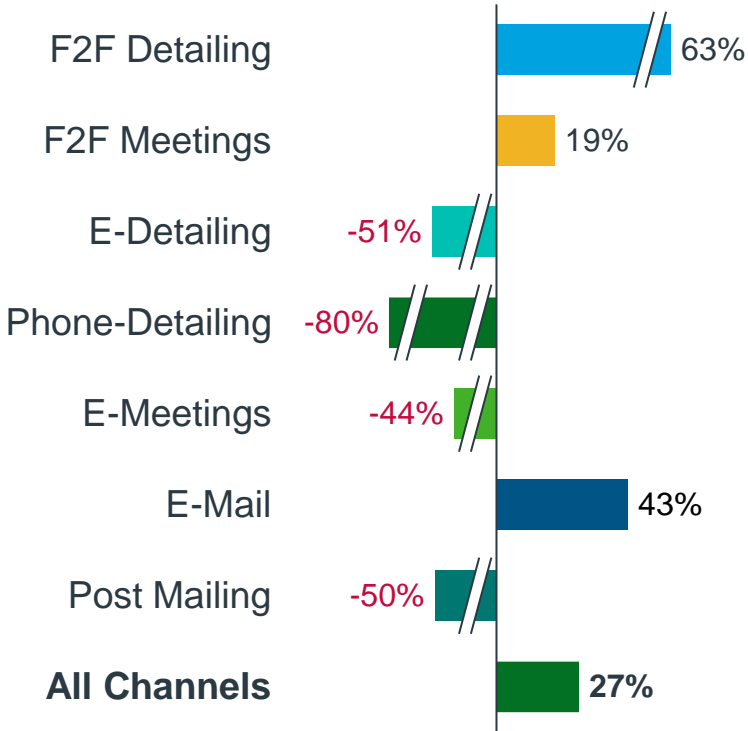


Total Market overall promotional volume increased by 27%, Jan-May 2021 vs 2020

Promotional volume share by channel

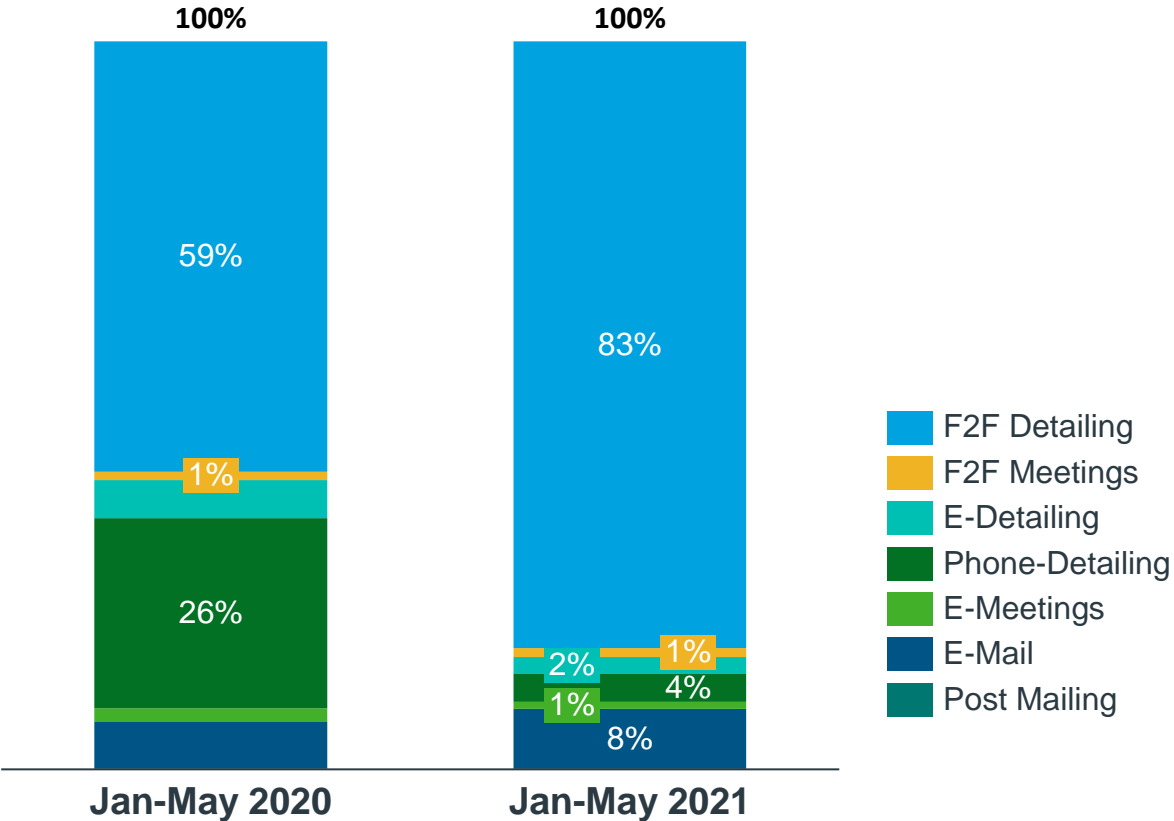


% Changes in promotional volume by channel
Jan-May 2021 vs 2020

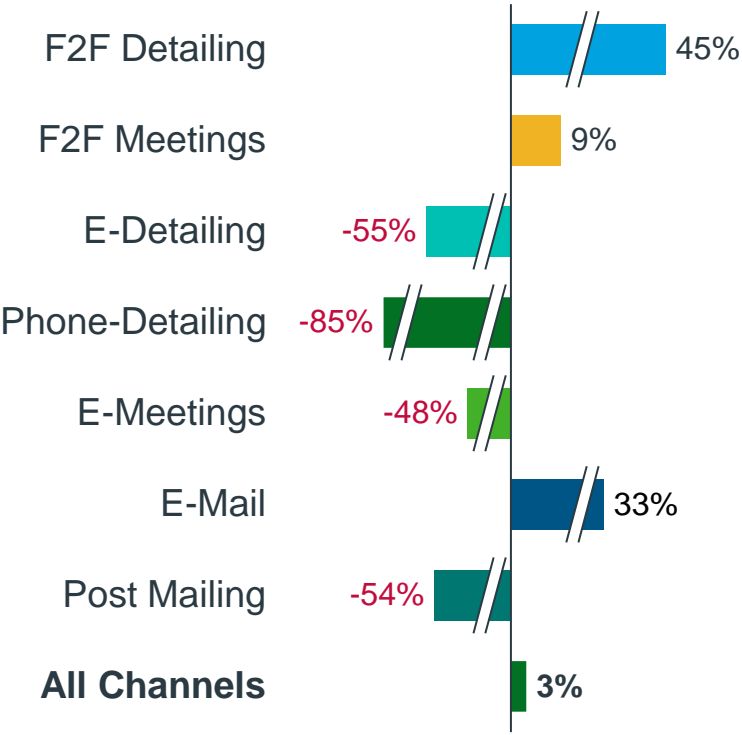


Total Market overall promotional volume (contacts) increased by 3%, Jan-May 2021 vs 2020

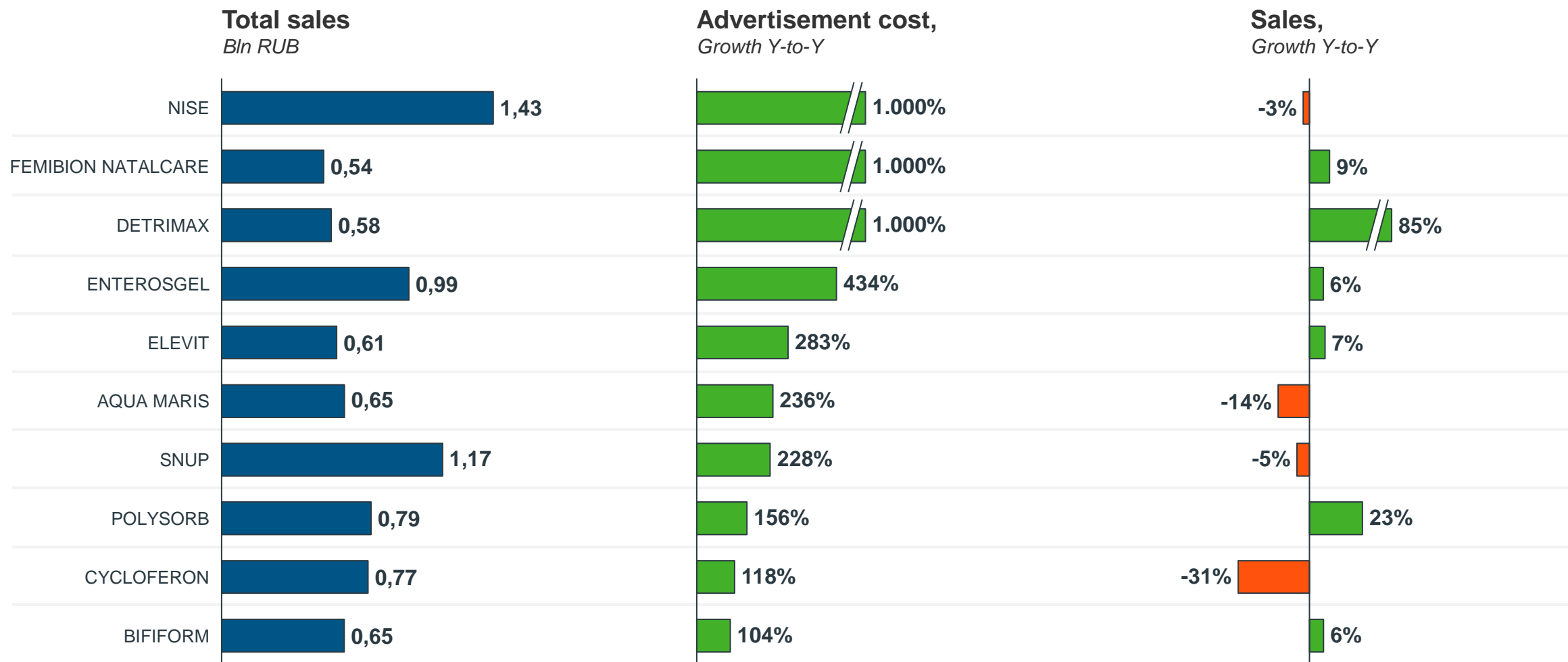
Promotional volume (contacts) share by channel



% Changes in promotional volume (contacts) by channel Jan-May 2021 vs 2020

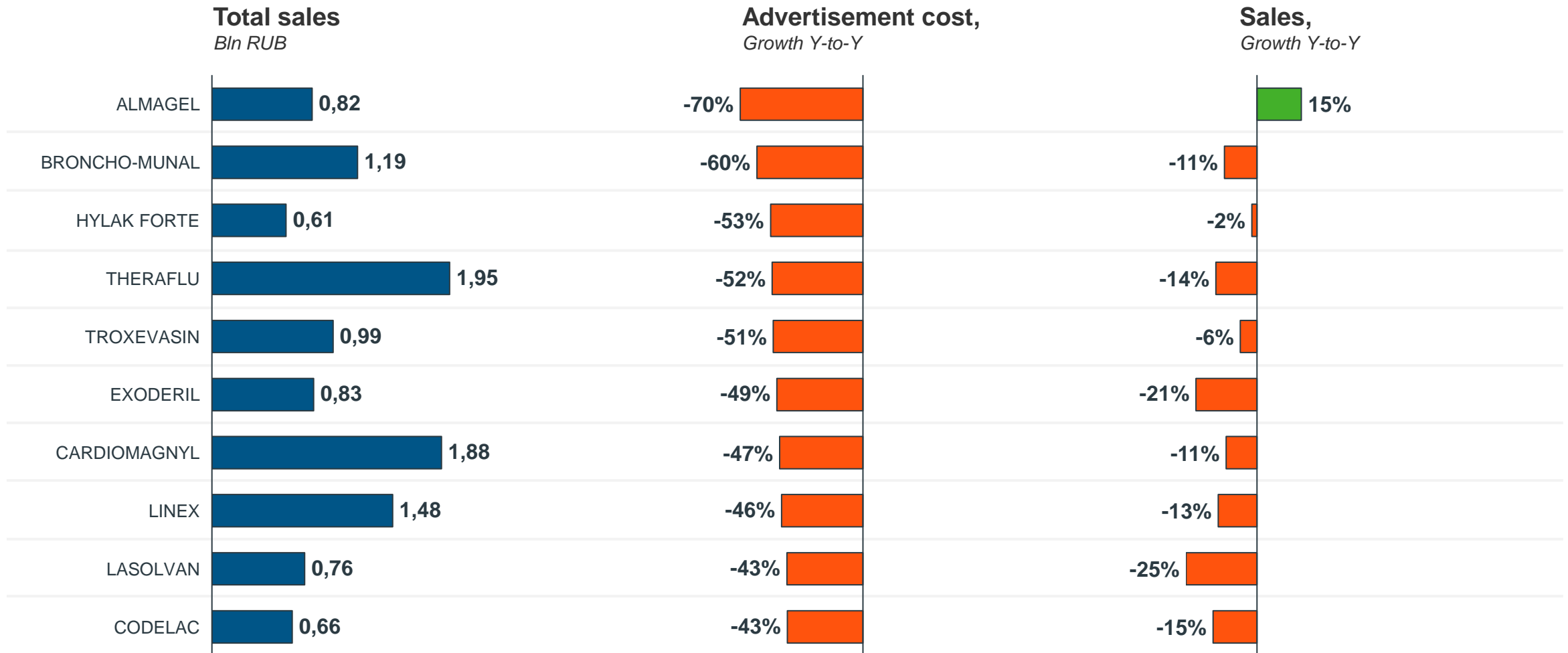


TOP-10 products by growth in advertisement investments in January-April 2021



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-April 2021



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 pharmacy chains Q1 2021





TOP-10 pharmacy chains and pharmacy associations by sales of drugs (excluding reimbursement drugs supply) 1Q 2021

#	Category*	Regions	Pharmacy Chain / Pharmacy Association	Number of stores (1 April 2021)	Market share of pharmacy chain on the retail market, drugs only, 1Q 2021, %	Change in drug sales 1Q 2021 vs. 1Q 2020, %	The indicator of the relative sales of drugs, 1Q 2021 (relative to the leading audited company)	Average check, rub.	The rank of gross sales 1Q 2021 (relative to the leading audited company)
1	Fed.	81	ASNA	12 919	11,32%	-13,9%	-	357	-
2	Fed.	57	Rigla ¹	3 207	6,11%	-5,2%	1,000	615	1
3	Fed.	27	Iris ²	2 437	5,15%	1,7%	0,843	-	2
4	Fed.	36	Erkafarm ³	1 070	5,05%	-7,3%	0,827	-	4
5	Fed.	52	April	2 059	4,44%	27,3%	0,726	571	3
6	Fed.	13	Neo-farm	832	3,72%	-8,9%	0,608	774	6
7	Intr.	8	Pharmacy chain 36,6 ^{**4}	1 587	3,53%	4,0%	0,578	-	5
8	Fed.	35	Vita (Samara)	1 825	3,12%	-7,3%	0,511	-	7
9	Fed.	46	Planeta zdorov'ya ^{**}	2 018	3,08%	20,4%	0,504	-	8
10	Fed.	8	Farmland	1 363	2,64%	13,7%	0,432	585	9
Total:				29 317	48,2%	2,4%			

*Fed. = federal, Intr. = interregional, Reg. = regional

**Expert assessment

1 Including OZ, Zhivika and DOMfarma

2 Including Fakmakopeyka, Farmakopeyka 24, Khelmi, Tvoy doktor, Zdes' apteka, Farmani, Aptechestvo, Stavropol'skiye gorodskiyе apteki, Farmaimpex, Novaya apteka and Minitsen

3 Including Doktor Stoletov, Ozerki, Raduga, Pervaya pomoshch', Ladushka, Khoroshaya apteka, Vashe zdorov'ye, Farmvolga, Narodnaya apteka, Novaya apteka, MosApteka, Ozerki u doma, Samson-pharma

4 Including AVE Group; Gorzdrav; A5 Group and Kalina-Pharm

Source: based on data from pharmacy chains and pharmacy associations participating in the rating

© 2021 IQVIA - Rating of Russian Pharmacy Chains Q1 2021



TOP-10 pharmacy chains by gross sales (excluding reimbursement drugs supply) 1Q 2021

#	Pharmacy Chain	The indicator of the relative gross sales of drugs, 1Q 2021	Change in gross sales 1Q 2021 vs. 1Q 2020, %
1	Rigla ¹	1,000	5,2%
2	Iris ²	0,647	1,2%
3	April	0,577	25,4%
4	Erkafarm ³	0,576	-7,3%
5	Pharmacy chain 36,6 ^{**4}	0,523	0,5%
6	Neo-farm	0,513	-8,2%
7	Vita (Samara)	0,448	-4,7%
8	Planeta zdorov'ya ^{**}	0,446	17,7%
9	Farmland	0,388	14,7%
10	Melodiya zdorov'ya ⁵	0,262	2,3%

*Expert assessment

1 Including OZ, Zhivika and DOMfarma

2 Including Fakmakopeyka, Farmakopeyka 24, Khelmi, Tvooy doktor, Zdes' apteka, Farmani, Aptechestvo, Stavropol'skiye gorodskiyey apteki, Farmaimpex, Novaya apteka and Minitsen

3 Including Doktor Stoletov, Ozerki, Raduga, Pervaya pomoshch', Ladushka, Khoroshaya apteka, Vashe zdorov'ye, Farmvolga, Narodnaya apteka, Novaya apteka, MosApteka, Ozerki u doma, Samson-pharma

4 Including AVE Group; Gorzdrav; A5 Group and Kalina-Pharm

5 Including own pharmacies, excluding franchising and partners

Source: based on data from pharmacy chains and pharmacy associations participating in the rating

© 2021 IQVIA - Rating of Russian Pharmacy Chains Q1 2021

TOP-6 pharmacy associations and service platforms by sales of drugs (excluding reimbursement drugs supply) 1Q 2021



#	Pharmacy Association / Service Platform	Head Office	Number of stores (1 April 2021)	Market share of pharmacy association on the retail market, drugs only, 1Q 2021, %	Change of drug sales 1Q 2021 vs. 1Q 2020, %	The indicator of the relative sales of drugs, 1Q 2021
1	ASNA	Moscow	12 919	11,32%	-13,9%	1,000
2	ProApteka	Moscow	7 865	10,02%	28,3%	0,727
3	MFU ¹	St. Petersburg	5 157	6,61%	-3,2%	0,546
4	Sozvezdiye	Moscow	4 638	4,85%	62,3%	0,427
5	VESNA ²	St. Petersburg	1 488	1,62%	2,2%	0,141
6	Zdravcity	Moscow	15 906	0,32%	94,1%	0,031

¹ MedPharm Unity

² All-Russian United Commonwealth of Independent Drugstores

Source: based on data from pharmacy associations and service platform participating in the rating

© 2021 IQVIA - Rating of Russian Pharmacy Chains Q1 2021

Rating of Russian distributors

Q1 2021



TOP-10 distributors on the market of gross sales, 1Q 2021

#	Distributor	Market share in gross sales, %		Change in gross sales 1Q 2021/1Q 2020, %
		1Q 2021	1Q 2020	
1	Pulse	12,2%	13,0%	-11,6%
2	Katren	11,7%	10,8%	1,7%
3	Protek	11,3%	11,3%	-6,4%
4	R-Pharm	8,0%	5,0%	49,6%
5	FK Grand Capital	5,0%	4,1%	13,5%
6	Pharmkomplekt	4,9%	4,8%	-5,1%
7	BSS	3,5%	3,0%	10,2%
8	Profitmed	2,7%	2,5%	3,5%
9	Irvin	2,0%	1,5%	26,8%
10	Avesta	1,9%	1,6%	7,3%
Total		63,2%	57,7%	8,9%

Source: based on data from distributors participating in the rating



TOP-10 distributors on the budget market, 1Q 2021

#	Distributor	Distributor Type	Head Office	Relative volume of budget sales, 1Q 2021	Share of budget sales from the gross sales volume, %
1	Pharmstandart**	National	Moscow	1,000	-
2	R-Pharm	National	Moscow	0.789	62%
3	Irvin	Regional	Moscow	0.297	93%
4	BSS	National	Saint-Petersburg	0.239	43%
5	Biotek	National	Moscow	0.231	-
6	Lancet	Interregional	Moscow	0.165	57%
7	Protek	National	Moscow	0.163	9%
8	GDP	Interregional	Moscow	0.135	50%
9	Farmimex*	Interregional	Moscow	0.115	40%
10	Severo-zapad	Interregional	Saint-Petersburg	0.105	97%

*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, 1Q 2021

#	Distributor	Distributor Type	Head Office	Relative volume of secondary distribution, 1Q 2021	Share of secondary distribution sales from the gross sales volume, %
1	R-Pharm	National	Moscow	1,000	31%
2	Firma Euroservice	Interregional	Moscow	0.313	84%
3	Lancet	Interregional	Moscow	0.288	40%
4	Pharmkomplekt	National	N.Novgorod	0.274	14%
5	Farmacevt	Interregional	Rostov-on-Don	0.195	57%
6	Asfadis*	Interregional	Moscow	0.194	26%
7	Protek	National	Moscow	0.163	4%
8	Pulse	National	Moscow	0.163	3%
9	BSS	National	Saint-Petersburg	0.138	10%
10	Pharmservice	Regional	Krasnodar	0.133	54%

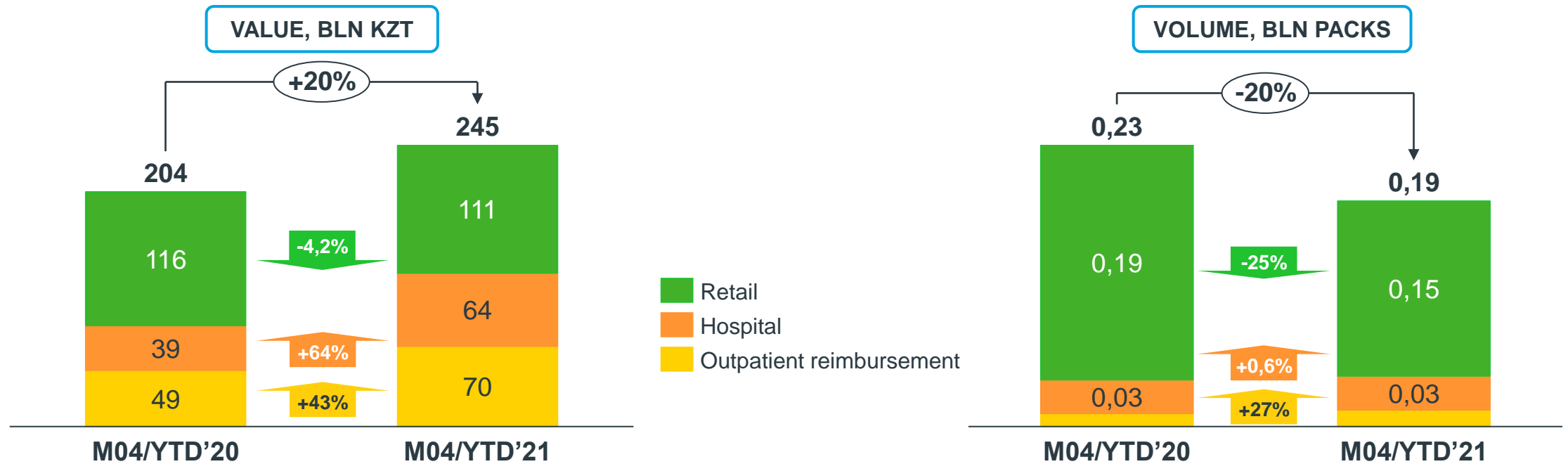
*Asfadis – distributors association, includes Avikon, Accentmed, Alenpharma, ASTI, Asti plus, Lesan pharma, Donskoi Hospital.

Source: based on data from distributors participating in the rating



Kazakhstan pharma market growth in January-April 2021

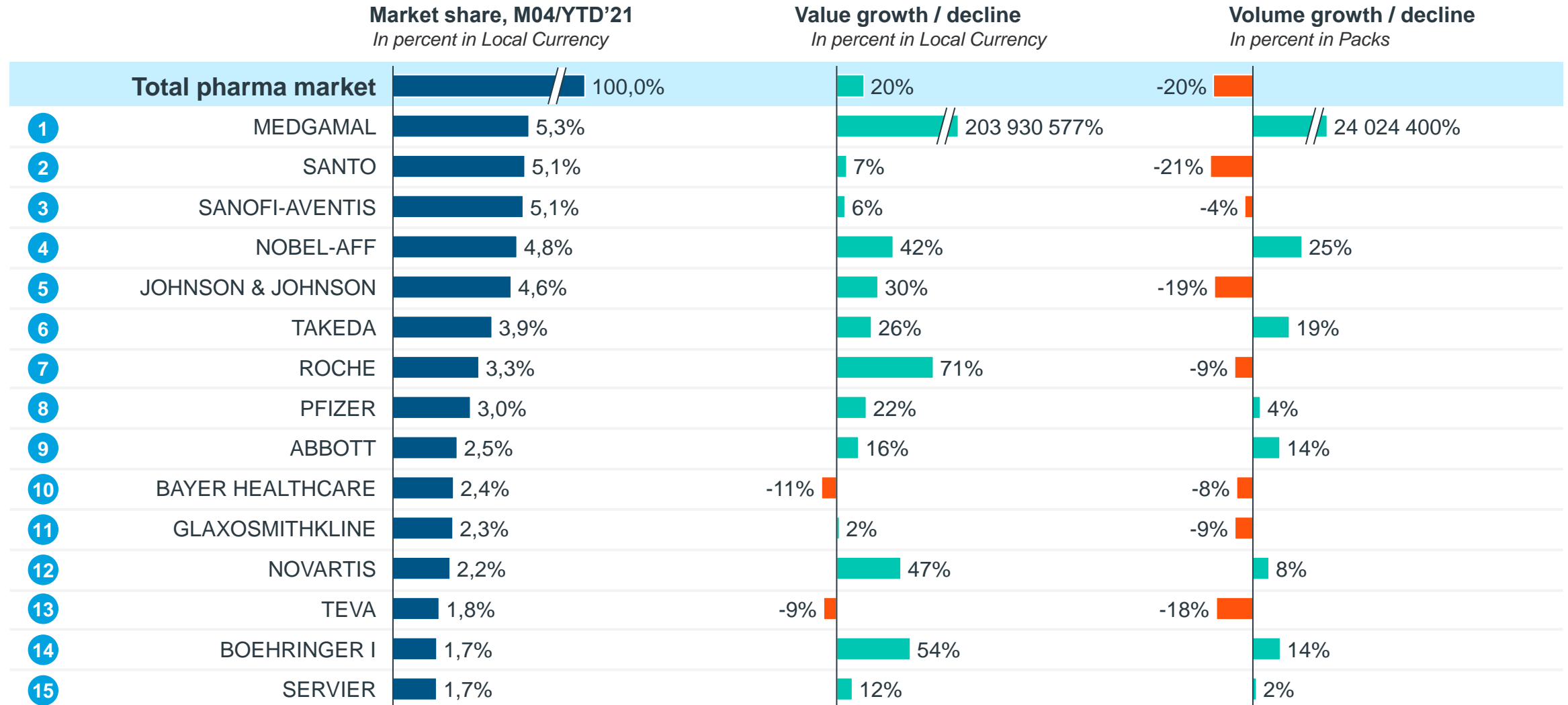
Market grew by 20,0% in value and decreased by 20% in volume



Indicator	KZT	USD	EUR	PACKS
Value M04/YTD'21, Bln.	245	0,58	0,49	0,19
Growth M04/YTD'21, %	▲ 20%	▲ 15%	▲ 4,8%	▼ -20%



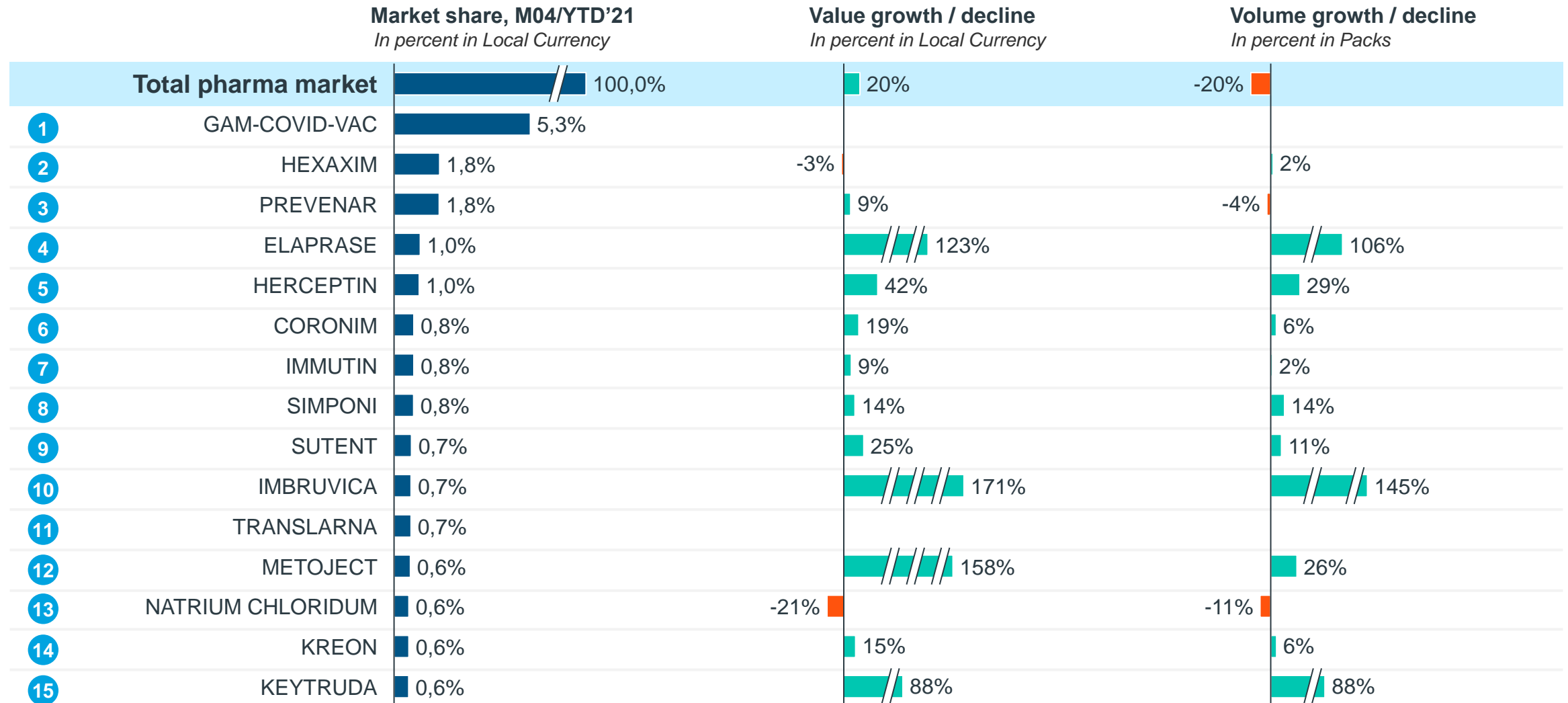
TOP-15 corporations on Kazakhstan market, January-April 2021



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



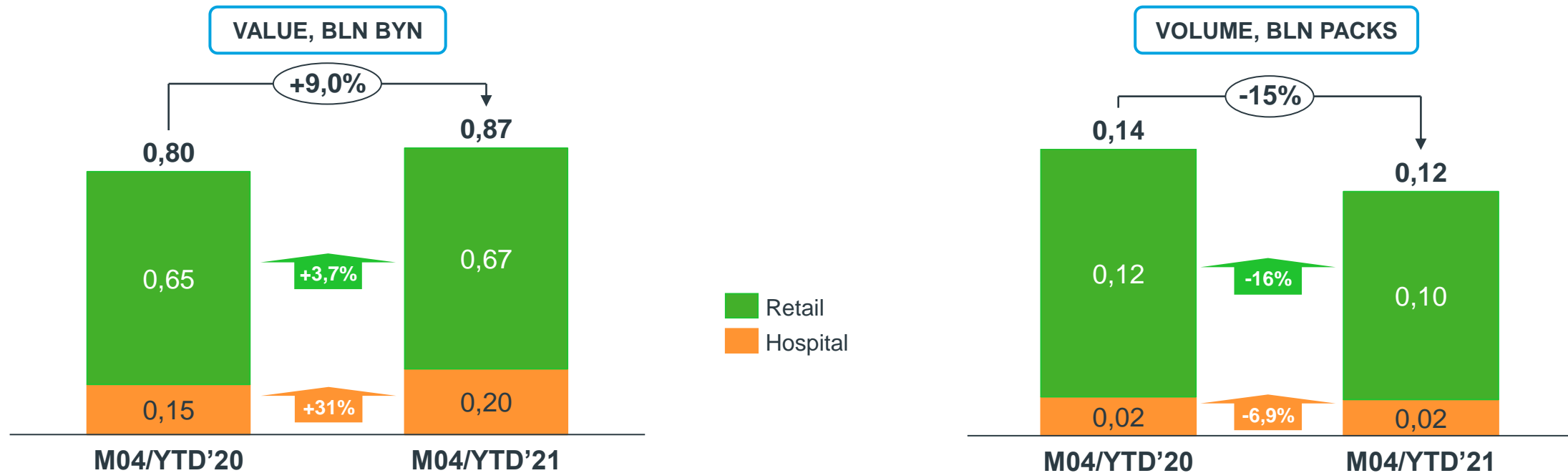
TOP-15 brands on Kazakhstan market, January-April 2021





Belarus pharma market growth in January-April 2021

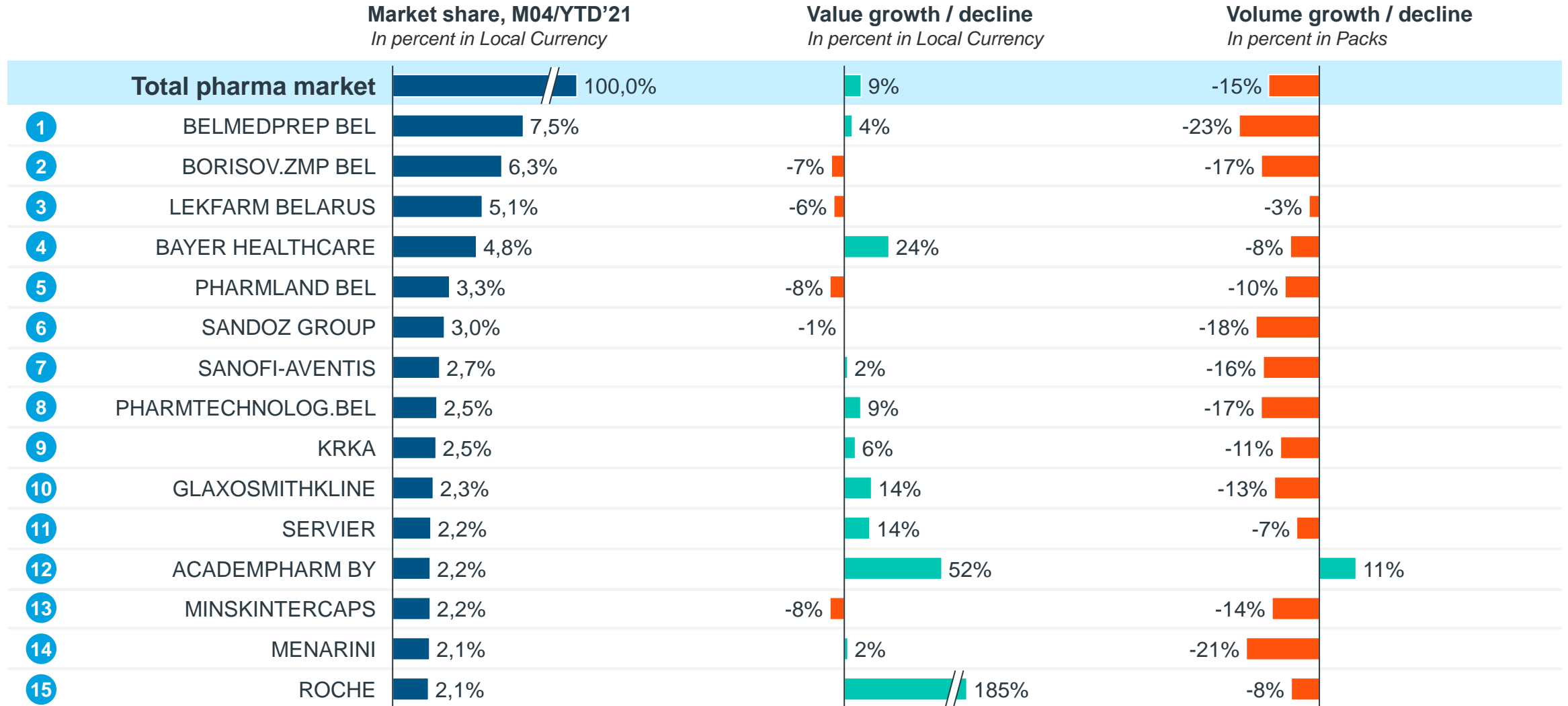
Market grew by 9% in value and decreased by 15% in volume



Indicator	BYN	USD	EUR	PACKS
Value M04/YTD'21, Bln.	0,87	0,34	0,28	0,12
Growth M04/YTD'21, %	▲ 9,0%	▼ -3,2%	▼ -12%	▼ -15%



TOP-15 corporations on Belarus market, January-April 2021





TOP-15 brands on Belarus market, January-April 2021

		Market share, M04/YTD'21 <i>In percent in Local Currency</i>	Value growth / decline <i>In percent in Local Currency</i>	Volume growth / decline <i>In percent in Packs</i>
Total pharma market		100,0%	9%	-15%
1	XARELTO	2,7%	49%	17%
2	GAM-COVID-VAC	1,7%		
3	ACTEMRA	1,4%	1 978%	661%
4	NATRIUM CHLORIDUM	0,9%	18%	2%
5	HEPARIN-BELMED	0,7%	855%	337%
6	RIVAXAN	0,7%		
7	FRAGMIN	0,6%	212%	144%
8	AMLESSA	0,6%	22%	1%
9	ENOXAPARIN S.K.	0,6%		
10	VAC.BBIBP CORV	0,6%		
11	ACC	0,6%	51%	17%
12	SERETIDE	0,5%	37%	9%
13	CEREPRO	0,5%	-34%	-43%
14	MILDRONAT	0,5%	79%	42%
15	CARDIOMAGNYL	0,5%	105%	50%



Uzbekistan pharma market growth in January-April 2021

Market grew by 108% in value and by 52% in volume



Indicator	UZS	USD	EUR	PACKS
Value M04/YTD'21, Bln.	5 747	0,55	0,45	0,31
Growth M04/YTD'21, %	▲ 108%	▲ 90%	▲ 74%	▲ 52%



TOP-15 corporations on Uzbekistan market, January-April 2021

		Market share, M04/YTD'21 <i>In percent in Local Currency</i>	Value growth / decline <i>In percent in Local Currency</i>	Volume growth / decline <i>In percent in Packs</i>
Total pharma market		100,0%	108%	52%
1	KRKA	3,6%	90%	73%
2	SANOFI-AVENTIS	2,8%	131%	100%
3	MENARINI	2,3%	12%	-1%
4	WORLD MEDICINE	2,3%	274%	227%
5	FARMAK KIEV	2,2%	111%	79%
6	NOVARTIS	2,1%	127%	80%
7	GM PHARMACEUTICALS	1,9%	119%	105%
8	AVISON PHARMACEUTICALS	1,9%	328%	207%
9	STADA	1,8%	41%	31%
10	YURIA-FARM UKR	1,5%	40%	12%
11	NIKA-PHARM	1,5%	64%	0%
12	GEDEON RICHTER	1,4%	2%	-8%
13	ABBOTT	1,4%	16%	13%
14	AVANTIKA MEDEX.	1,3%	205%	109%
15	MARION BIOTECH	1,3%	46%	30%



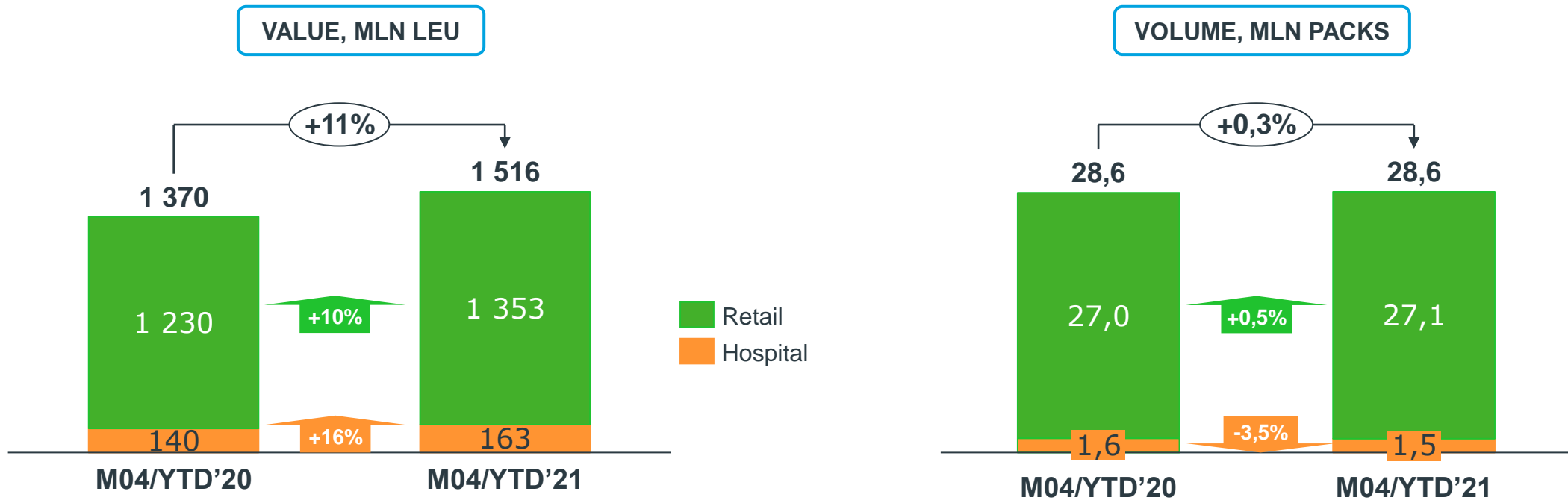
TOP-15 brands on Uzbekistan market, January-April 2021

		Market share, M04/YTD'21 <i>In percent in Local Currency</i>	Value growth / decline <i>In percent in Local Currency</i>	Volume growth / decline <i>In percent in Packs</i>
Total pharma market		100,0%	108%	52%
1	CEFTRIAZONE	1,0%	51%	-26%
2	QUPEN	0,8%	169%	171%
3	THERAFLU	0,8%	347%	336%
4	ACC	0,7%	254%	220%
5	CANEPHRON N	0,6%	132%	135%
6	QUACEF NEO	0,6%		
7	AZIMAC	0,6%	391%	351%
8	VIFERON	0,6%	38%	25%
9	CLEXANE	0,6%	620%	590%
10	ACTOVEGIN	0,6%	-2%	-3%
11	TIVORTIN	0,5%	143%	145%
12	DESREM	0,5%		
13	RINOXIL	0,5%	99%	91%
14	CEFOPERAZONE+SULBACTAM	0,5%		
15	NIMESIL	0,5%	4%	3%



Moldova pharma market growth in January-April 2021

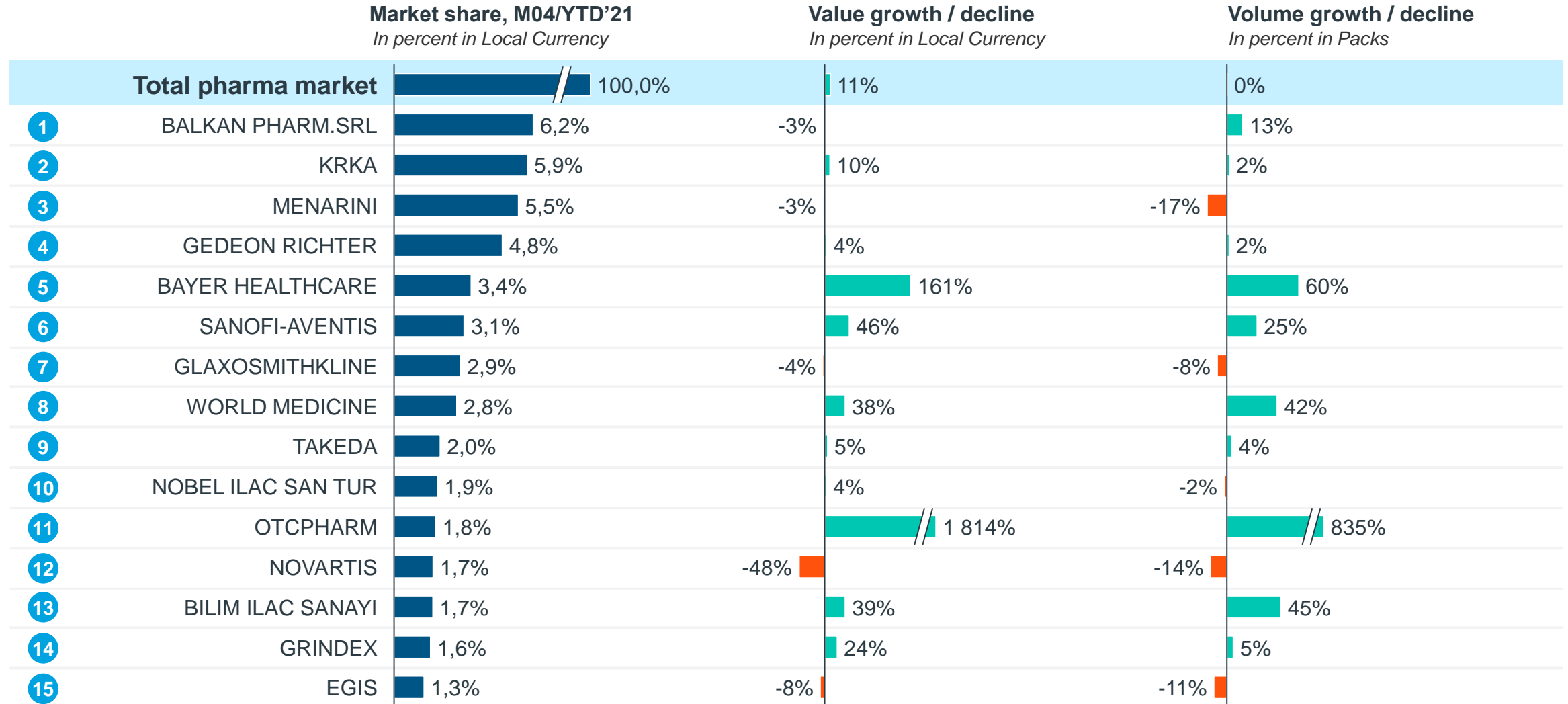
Market grew by 11% in value and by 0,3% in volume



Indicator	LEU	USD	EUR	PACKS
Value M04/YTD'21, Mln.	1 516	86,0	71,5	28,6
Growth M04/YTD'21%	▲ 11%	▲ 11%	▲ 1,6%	▲ 0,3%



TOP-15 corporations on Moldova market, January-April 2021





TOP-15 brands on Moldova market, January-April 2021

		Market share, M04/YTD'21 <i>In percent in Local Currency</i>	Value growth / decline <i>In percent in Local Currency</i>	Volume growth / decline <i>In percent in Packs</i>
Total pharma market		100,0%	11%	0%
1	XARELTO	1,8%	495%	246%
2	ARBIDOL MAXIMUM	1,8%	13 788%	12 889%
3	MPI VIROPACK PLUS	0,8%		
4	CARDIOMAGNYL	0,7%	3%	2%
5	SODIUM CHLORIDE	0,7%	-11%	-15%
6	LERKAMEN	0,7%	27%	22%
7	ANGIOFLUX	0,6%	175%	136%
8	CLEXANE	0,6%	185%	184%
9	FORSEF	0,6%	126%	134%
10	SERETIDE	0,5%	15%	18%
11	SIOFOR	0,5%	1%	-14%
12	THERAFLU	0,5%	20%	15%
13	MAGNE B6	0,5%	37%	31%
14	LORISTA	0,5%	-8%	-10%
15	HEPARIN	0,5%	274%	68%

CONTACT US

Anton Kalyapin

Associate Director, Offering and Supplier Relations

 Anton.Kalyapin@IQVIA.com

 +7 499 272 05 00

Svetlana Nikulina

Sales Director Russia and CIS

 Svetlana.Nikulina@IQVIA.com

 +7 499 272 05 00

Nadezhda Kalinich

Client Service Representative

 Nadezhda.Kalinich@IQVIA.com

 +7 499 272 05 00