



Facts from IQVIA

M10 2021



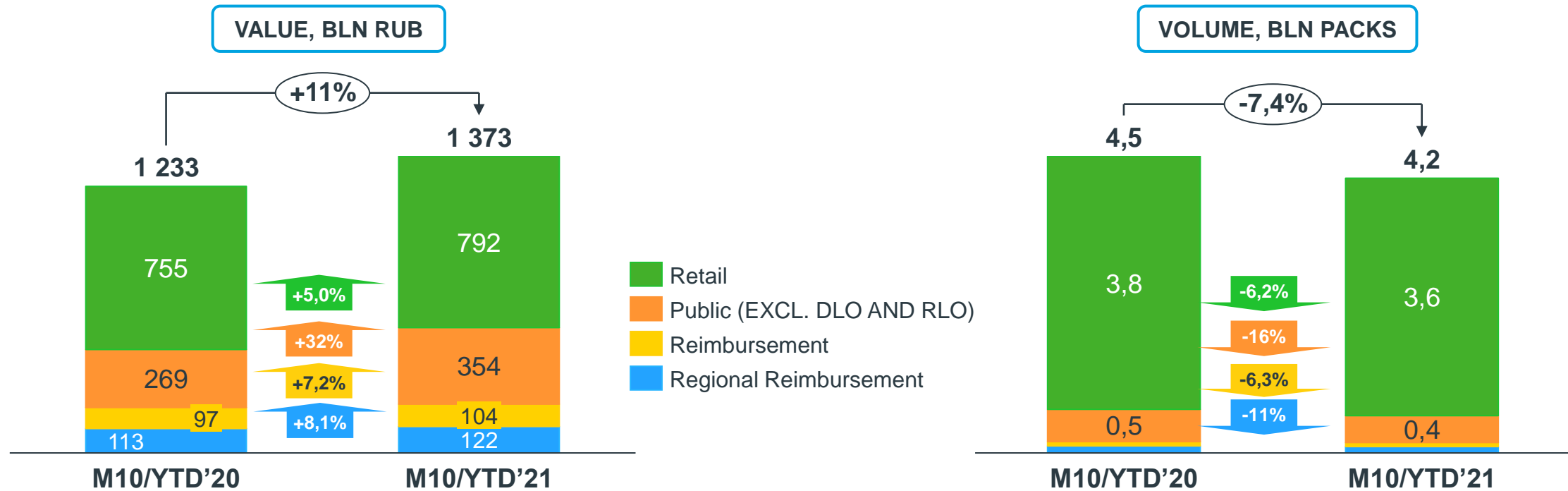
7,4%



INFLATION

Russian pharma market growth in Jan-Oct 2021

Market grew by 11% in value and decreased by 7,4% in volume



- Retail
- Public (EXCL. DLO AND RLO)
- Reimbursement
- Regional Reimbursement

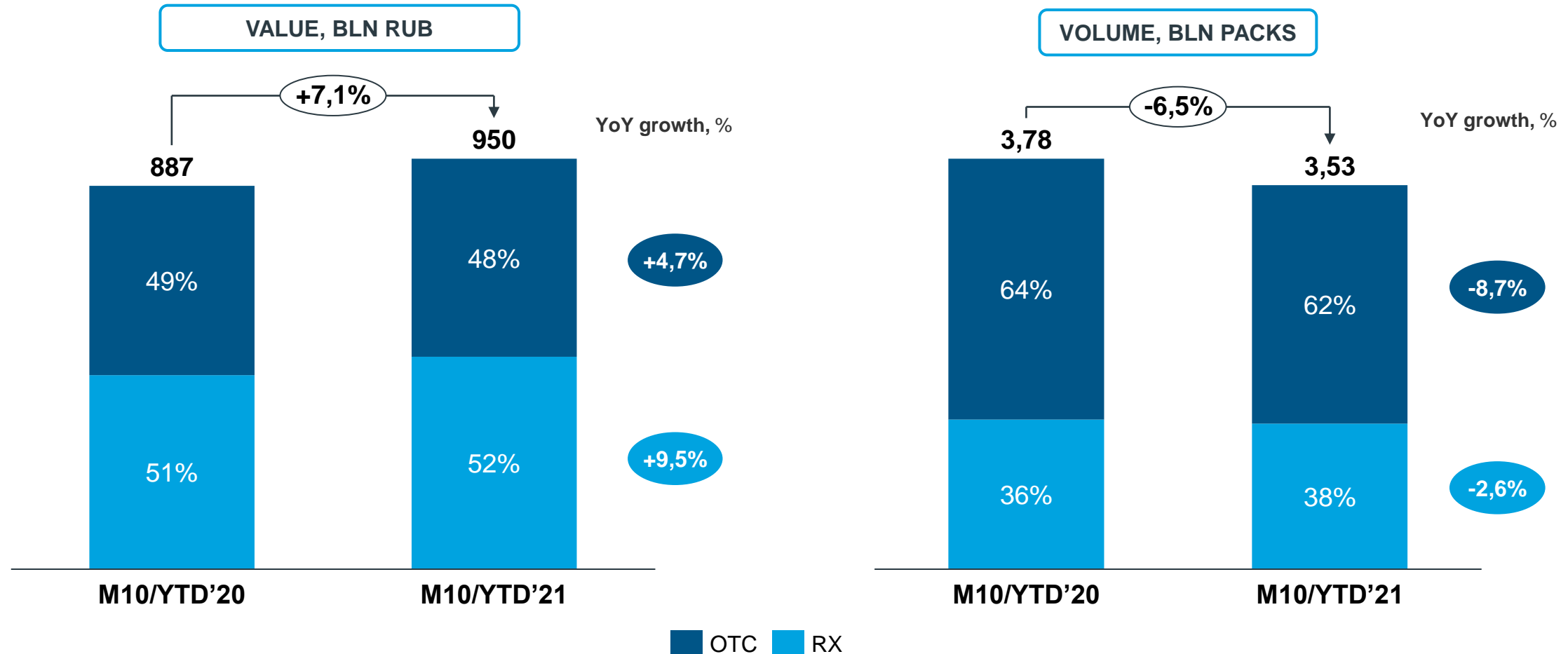
Indicator	RUB	USD	EUR	PACKS
Value M10/YTD'21, Bln.	1 373	18,6	15,6	4,2
Growth M10/YTD'21, %	▲ 11%	▲ 7,9%	▲ 2,1%	▼ -7,4%

Source: IQVIA databases. Retail, Public, DLO, RLO (excluding food supplements and diagnostic agents), TRD Prices
 Inflation Rate: Countries - List (tradingeconomics.com)



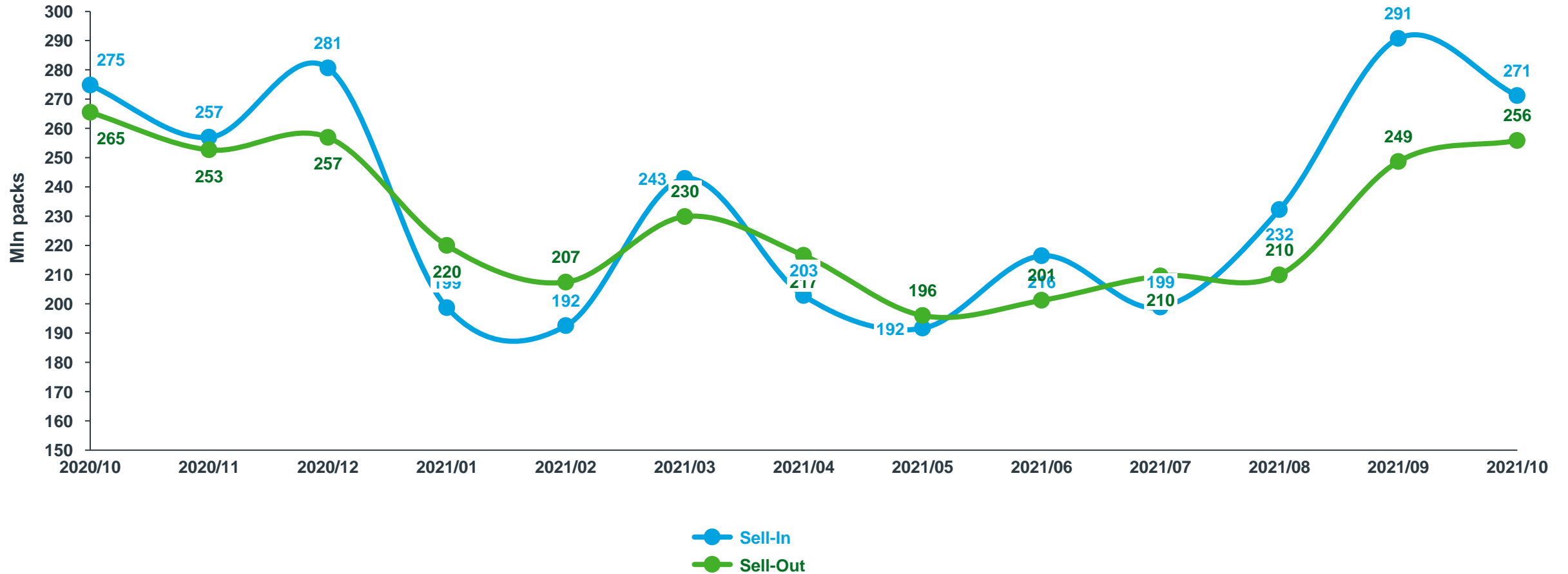
Russian pharma market increase in Jan-Oct 2021

Retail Sell-Out: Market grew by 7,1% in value and dropped by 6,5% in volume



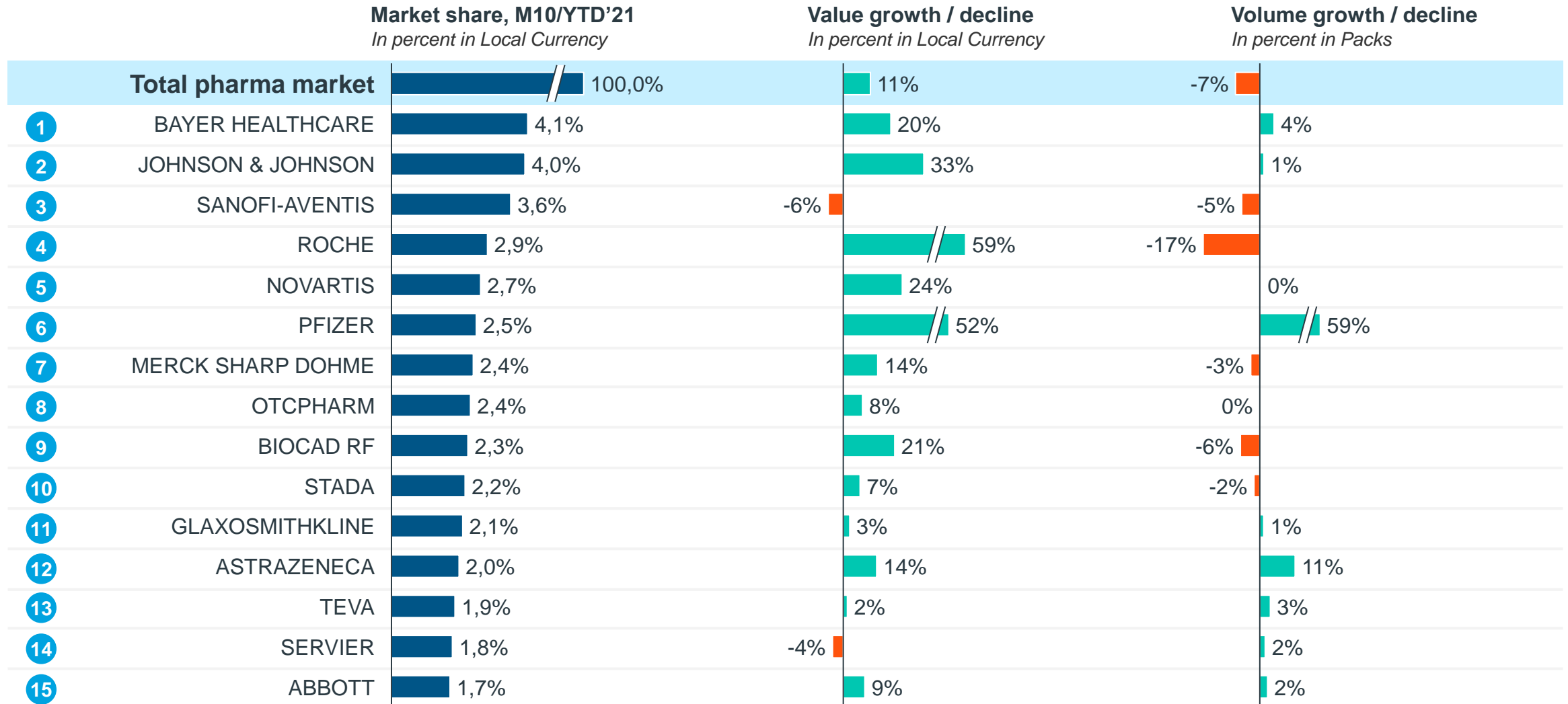


Sell-In vs Sell-Out, OTC registered drugs



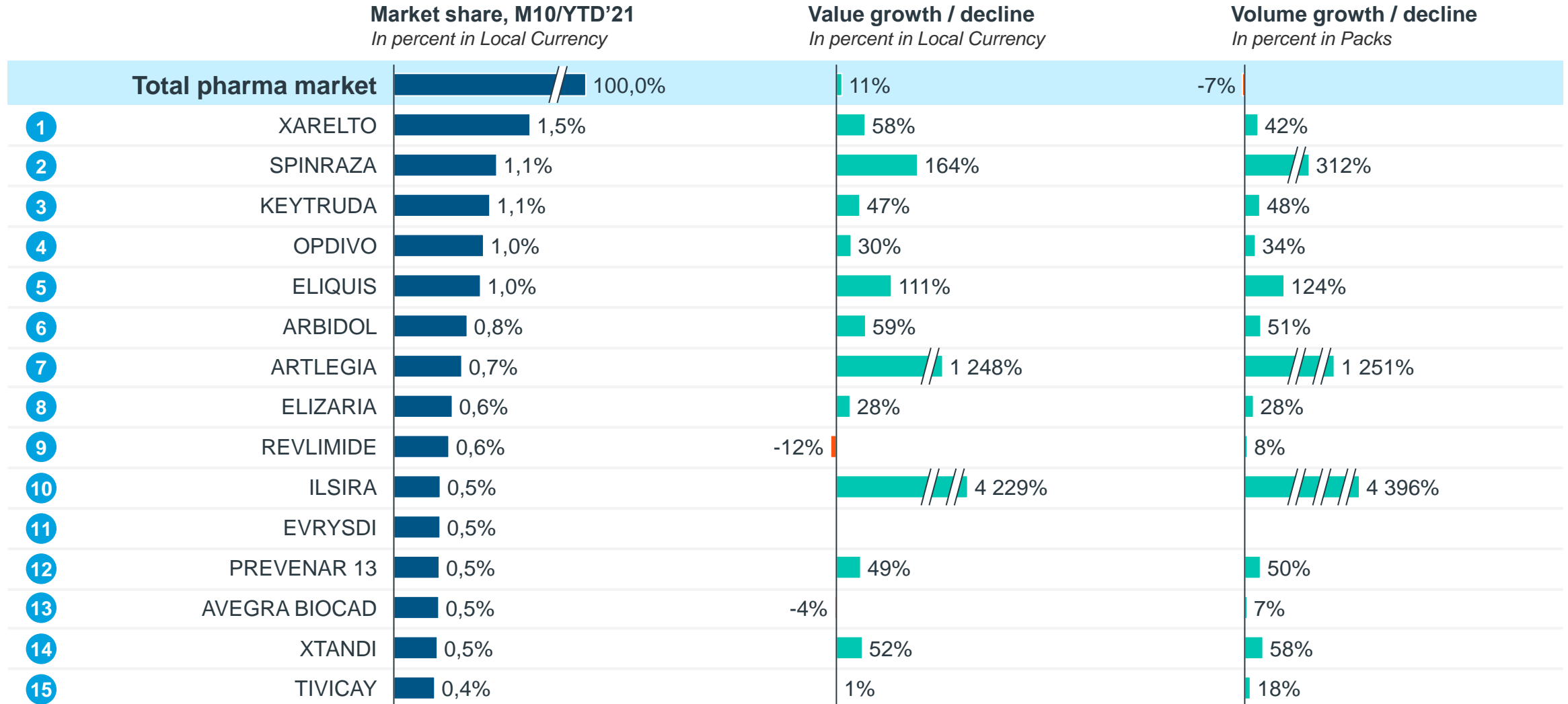


TOP-15 corporations on Russian market, Jan-Oct 2021

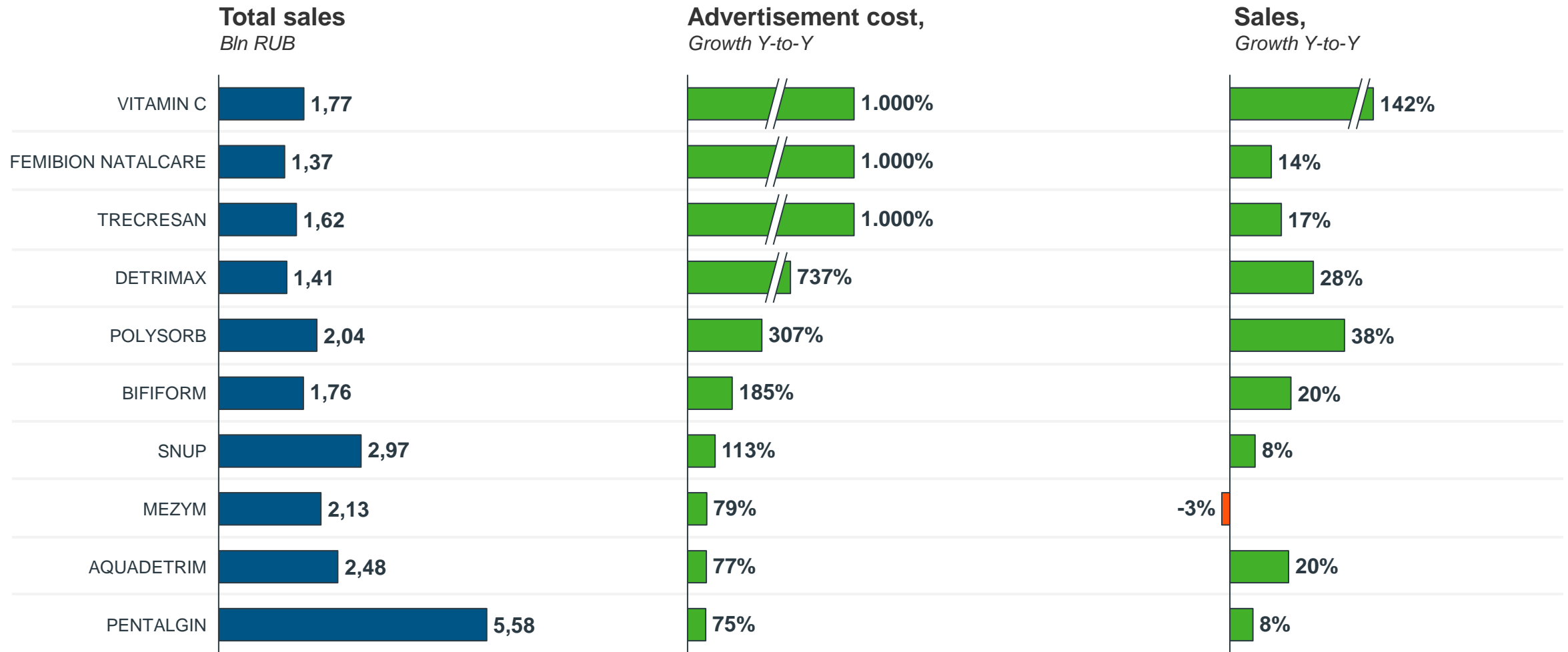




TOP-15 brands on Russian market, Jan-Oct 2021

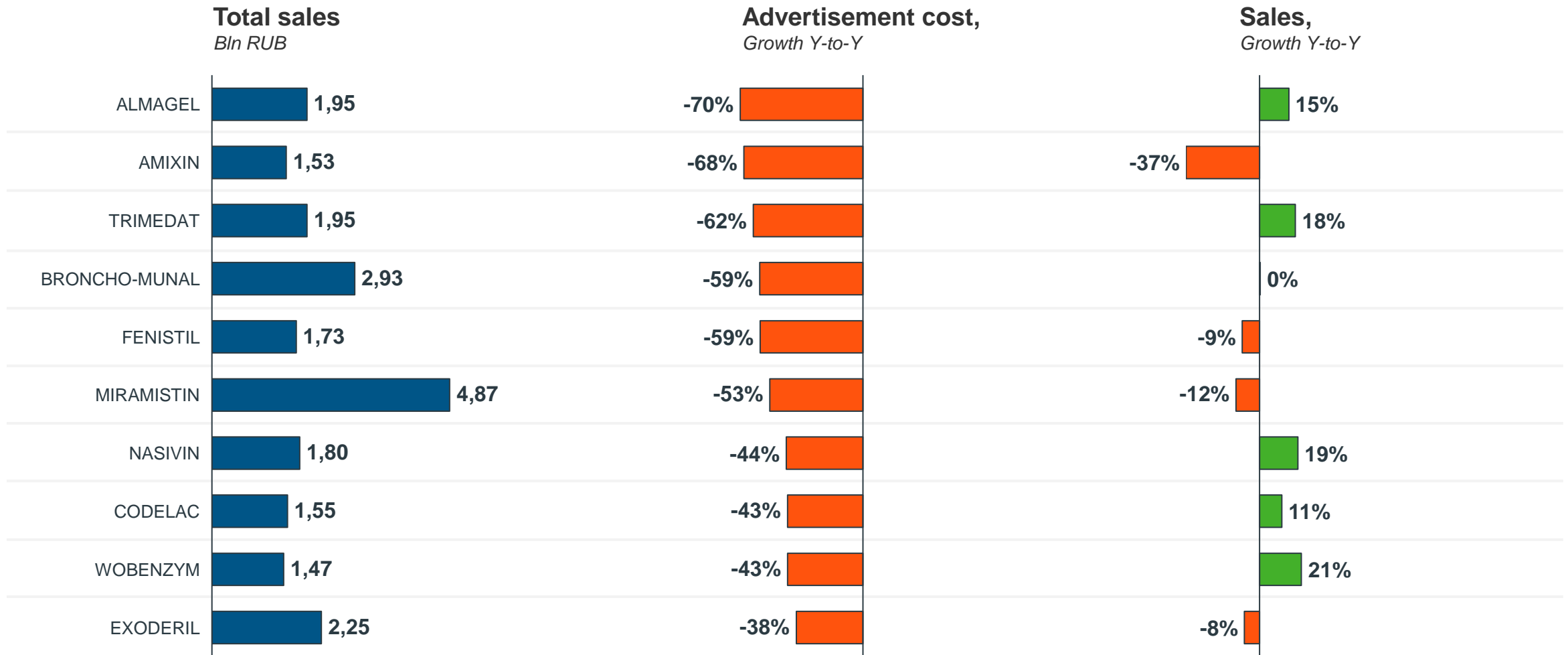


TOP-10 products by growth in advertisement investments in Jan-Oct 2021



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

TOP-10 products by decline in advertisement investments in Jan-Oct 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

Uteka — one of the largest pharmacy marketplace in Russia

TRAFFIC IN NOVEMBER 2021:

11.4 million sessions

(7.91 million on website + 3.49 million on mobile apps)

TURNOVER IN NOVEMBER 2021:

304.2 million rubles

81

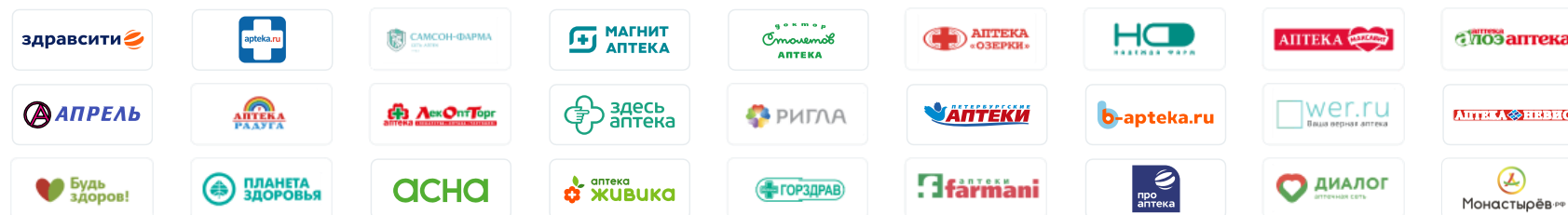
Russian regions

45 377

integrated pharmacies

60 910

SKUs



Current members of Uteka:

ZdravCiti, Apteka.ru, Erkafarm (Samson-Farma, Mosapteka, Doktor Stoletov, Ozerki, Apteka №1, Raduga, Khoroshaya Apteka, Superapteka, etc.), Rigla (Rigla, Zhivika, Bud' Zdorov!), Planeta Zdorov'ya, ASNA, 36.6, Gorzdrav, Farmani, Aptechestvo, Maksavit, 36.7, ProApteka, Dialog, Yunifarma (Yunifarma, Rosapteka), WER.RU, Omnifarm, Moya Apteka, Nadezhda-Farm, ALOE, Vasha №1, Monastyr'ev, Zdes' apteka, Aprel', Nevis, Apteki Forte, LekOptTorg, Peterburgskiye apteki, Magnit apteka, Farmaimpeks (Berezhnaya apteka, Ekona, Klyukva).

During the integration process:

Serdce Rossii, Stolichnye apteki, Vkusvill, Evalar

Statistics provided by Uteka

1 E-com prices for any SKU in pharmacies connected to Uteka, in any region.

You can see all prices for any selected product by pharmacy chains in the region
(if necessary, with an accuracy to a specific pharmacy): minimum, median and maximum prices, their dynamics over time on a weekly basis.

Region: Moscow and Moscow Oblast		Product name: Nurofen Express		
Pharmacy network: Planeta Zdorovya		SKU: 338562		
Week	Minimum price	Average price	Median price	Maximum price
15.11-21.11.2021	p.219,00	p.231,74	p.235,00	p.246,00
22.11-28.11.2021	p.216,00	p.231,34	p.235,00	p.247,00
29.11-05.12.2021	p.191,00	p.232,15	p.236,00	p.254,00
06.12-12.12.2021	p.191,00	p.233,29	p.239,00	p.254,00

2 Data on any SKU representation in pharmacy chains connected to Uteka, in any region.

You can see the average distribution % for any selected product for each pharmacy chain in each region during the week, its dynamics.

Region: 'Region name'		Product: 'Product name'		
	Week 1	Week 2	Week 3	Week 4
Pharmacy chain 1	0%	75%	70%	85%
Pharmacy chain 2	82%	85%	90%	75%

Rating of Russian pharmacy chains

1-3Q 2021



TOP-10 pharmacy chains and pharmacy associations by sales of drugs (excluding reimbursement drugs supply) 1-3Q 2021

#	Category*	Regions	Pharmacy Chain / Pharmacy Association	Number of stores (1 Oct 2021)	Market share of pharmacy chain on the retail market, drugs only, 1-3Q 2021, %	Change in drug sales 1-3Q 2021 vs. 1-3Q 2020, %	The indicator of the relative sales of drugs, 1-3Q 2021 (relative to the leading audited company)	Average check, rub.	The rank of gross sales 1-3Q 2021 (relative to the leading audited company)
1	Fed.	80	ASNA	15 018	12,03%	0,4%	-	388	-
2	Fed.	56	Rigla ¹	3 346	6,86%	23,1%	1,000	610	1
3	Fed.	79	United Pharmacy Chain Erkafarm and Melodiya zdorov'ya ²	1 825	6,61%	-0,5%	0,963	569	2
5	Fed.	27	Iris ³	2 686	4,96%	14,7%	0,723	-	4
4	Fed.	54	April	2 657	4,64%	45,6%	0,676	577	3
6	Fed.	13	Neo-farm	959	3,67%	6,4%	0,534	-	5
7	Fed.	37	Vita (Samara)	1 927	3,07%	8,0%	0,448	-	6
8	Fed.	10	Farmland	1 481	2,72%	30,1%	0,396	578	7
9	Int.	36	Maxavit	685	1,41%	6,6%	0,206	595	8
10	Reg.	2	Gubernskiye Apteki	355	0,91%	9,1%	0,133	998	9
Total:				30 939	46,9%	14,3%			

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

¹ Including OZ, Zhivika and DOMfarma

² Including Doktor Stoletov, Ozerki, Raduga, Pervaya pomoshch', Ladushka, Khoroshaya apteka, Vashe zdorov'ye, Farmvolga, Narodnaya apteka, Novaya apteka, MosApteka, Ozerki u doma, Melodiya zdorov'ya

³ Including Fakmakopeyka, Farmakopeyka 24, Khelmi, Tvoy doktor, Zdes' apteka, Farmani, Aptechestvo, Stavropol'skiye gorodskiye apteki, Farmaimpex, Novaya apteka and Minitsen

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

© 2021 IQVIA - Rating of Russian Pharmacy Chains 1-3Q 2021

TOP-10 pharmacy chains by gross sales (excluding reimbursement drugs supply) 1-3Q 2021

#	Pharmacy Chain	The indicator of the relative gross sales of drugs, 1-3Q 2021	Change in gross sales 1-3Q 2021 vs. 1-3Q 2020, %
1	Rigla ¹	1,000	21,3%
2	United Pharmacy Chain Erkafarm and Melodiya zdorov'ya ²	0,795	0,1%
3	April	0,661	46,3%
4	Neo-farm	0,499	6,2%
5	Vita (Samara)	0,430	8,6%
6	Farmland	0,391	28,4%
7	Maxavit	0,198	7,5%
8	Gubernskiye Apteki	0,125	11,0%
9	Volgofarm	0,051	4,1%
10	Vasha №1	0,042	47,6%

¹ Including OZ, Zhivika and DOMfarma

² Including Doktor Stoletov, Ozerki, Raduga, Pervaya pomoshch', Ladushka, Khoroshaya apteka, Vashe zdorov'ye, Farmvolga, Narodnaya apteka, Novaya apteka, MosApteka, Ozerki u doma, Melodiya zdorov'ya

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

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TOP-6 pharmacy associations and service platforms by sales of drugs (excluding reimbursement drugs supply) 1-3Q 2021

#	Pharmacy Association / Service Platform	Head Office	Number of stores (1 Oct 2021)	Market share of pharmacy association on the retail market, drugs only, 1-3Q 2021, %	Change of drug sales 1-3Q 2021 vs. 1-3Q 2020, %	The indicator of the relative sales of drugs, 1-3Q 2021
1	ASNA	Moscow	15 018	12,03%	0,4%	1,000
2	ProApteka	Moscow	8 129	10,36%	33,2%	0,734
3	Sozvezdiye	Moscow	4 874	5,38%	66,0%	0,456
4	Iris ¹	Moscow	2 686	4,96%	14,7%	0,342
5	MFU ²	St. Petersburg	5 243	2,13%	15,4%	0,169
6	VESNA ³	St. Petersburg	1 643	1,43%	8,5%	0,116

¹ Including Fakmakopeyka, Farmakopeyka 24, Khelmi, Tvoy doktor, Zdes' apteka, Farmani, Aptechestvo, Stavropol'skiye gorodskiye apteki, Farmaimpex, Novaya apteka and Minitsen

² MedPharm Unity

³ 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 1-3Q 2021

Rating of Russian distributors 1-3Q 2021

TOP-10 distributors on the market of gross sales, 1-3Q 2021

#	Distributor	Market share in gross sales, %		Change in gross sales 1-3Q 2021/1-3Q 2020, %
		1-3Q 2021	1-3Q 2020	
1	Pulse	12,4%	12,2%	13,7%
2	Katren	11.5%	11.5%	12.0%
3	Protek	10.9%	11.9%	2.3%
4	R-Pharm	8.2%	6.1%	50.9%
5	Pharmkomplekt	4.9%	5.2%	5.0%
6	FK Grand Capital	4.8%	4.4%	22.7%
7	BSS	3.7%	3.3%	24.9%
8	Profitmed	2.7%	2.7%	11.2%
9	Irvin	2.1%	1.6%	49.5%
10	Asfadis*	1.8%	2.1%	-6.5%
Total		63,1%	60,9%	15,5%

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

Source: based on data from distributors participating in the rating

TOP-10 distributors on the budget market, 1-3Q 2021

#	Distributor	Distributor Type	Head Office	Relative volume of budget sales, 1-3Q 2021	Share of budget sales from the gross sales volume, %
1	R-Pharm	National	Moscow	1.000	57%
2	Pharmstandart**	National	Moscow	0.788	-
3	Irvin	Regional	Moscow	0.403	90%
4	BSS	National	Saint-Petersburg	0.343	44%
5	GDP	Interregional	Moscow	0.243	77%
6	Protek	National	Moscow	0.219	9%
7	Farmimex*	Interregional	Moscow	0.210	55%
8	Lancet	Interregional	Moscow	0.195	54%
9	Severo Zapad	Interregional	Saint-Petersburg	0.114	97%
10	Farmservice	Regional	Krasnodar	0.091	64%

*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, 1-3Q 2021

#	Distributor	Distributor Type	Head Office	Relative volume of secondary distribution, 1-3Q 2021	Share of secondary distribution sales from the gross sales volume, %
1	R-Pharm	National	Moscow	1,000	35%
2	Lancet	Interregional	Moscow	0.257	43%
3	Asfadis*	Interregional	Moscow	0.254	41%
4	Firma Euroservice	Interregional	Moscow	0.248	85%
5	Pharmkomplekt	National	N.Novgorod	0.195	12%
6	Protek	National	Moscow	0.170	5%
7	Pulse	National	Moscow	0.147	3%
8	Farmacevt	Interregional	Rostov-on-Don	0.134	50%
9	BSS	National	Saint-Petersburg	0.127	10%
10	Katren	National	Novosibirsk	0.117	3%

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

Source: based on data from distributors participating in the rating



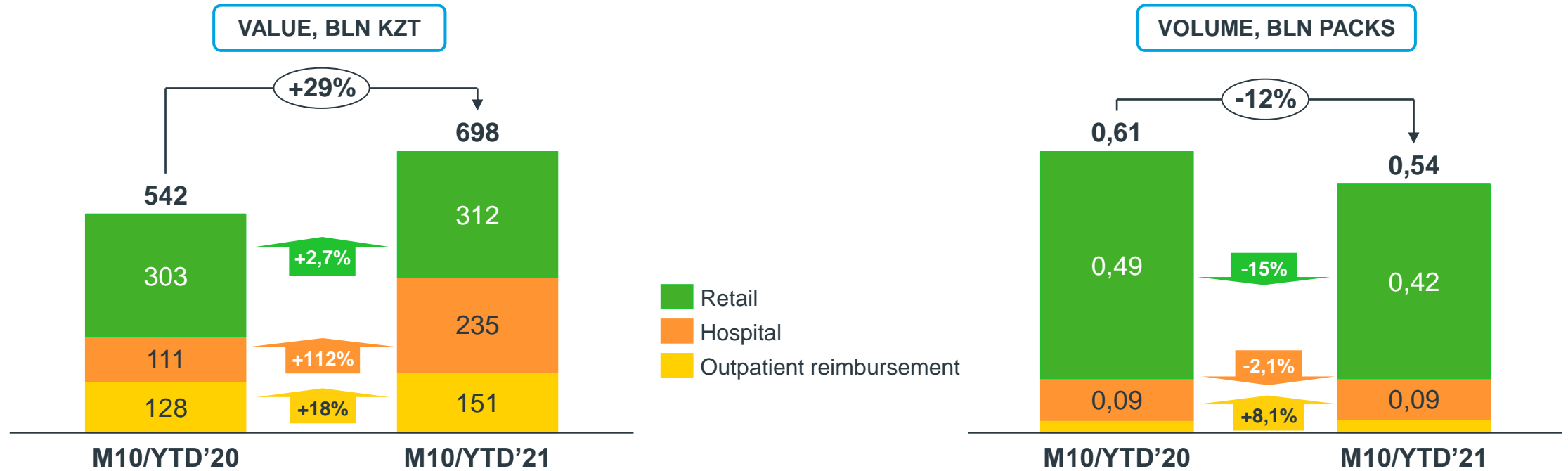
8,9%



INFLATION

Kazakhstan pharma market growth in Jan-Oct 2021

Market grew by 29% in value and decreased by 12% in volume

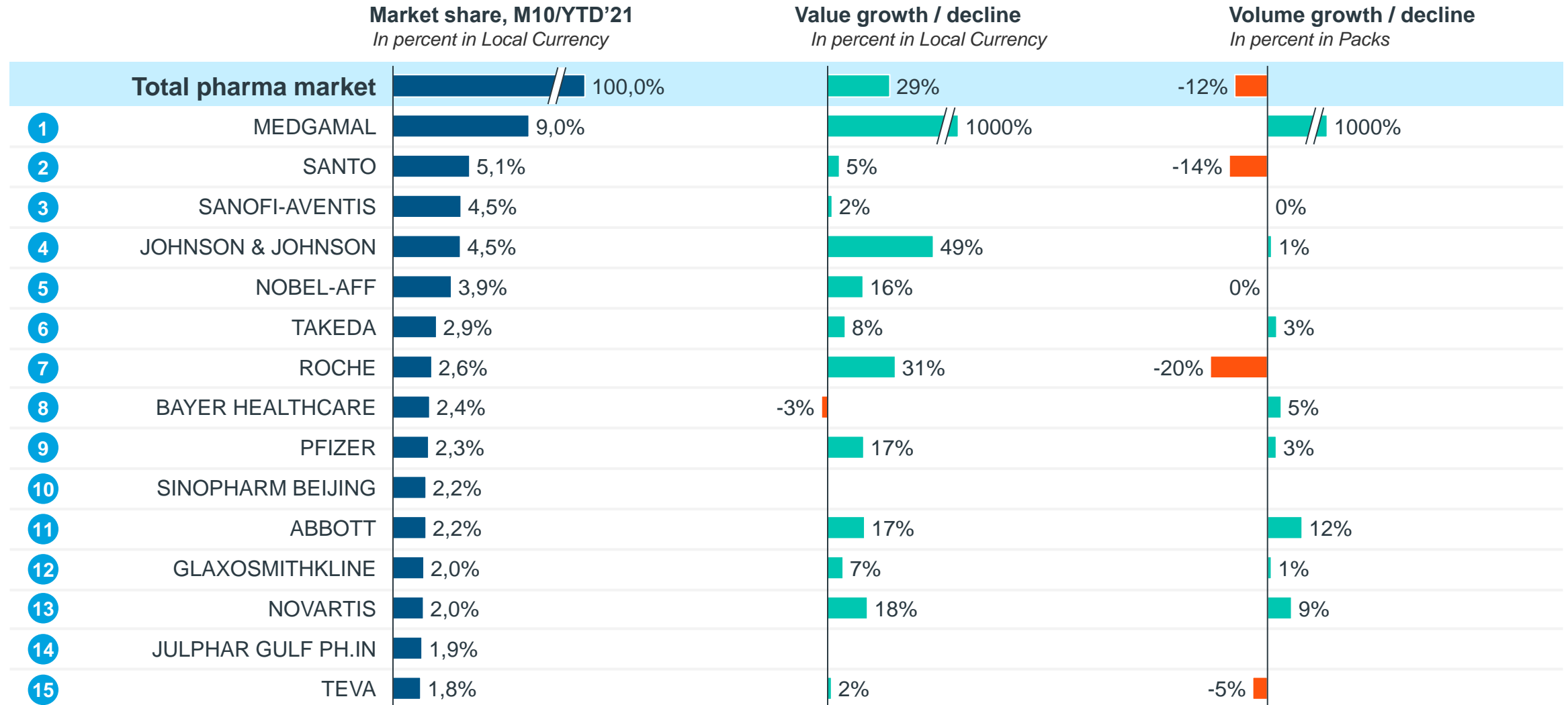


Indicator	KZT	USD	EUR	PACKS
Value M10/YTD'21, Bln.	698	1,65	1,38	0,54
Growth M10/YTD'21, %	▲ 29%	▲ 25%	▲ 18%	▼ -12%

Source: IQVIA databases. Retail, Hospital, Reimbursement (excluding food supplements and diagnostic agents), TRD Prices
 Inflation Rate: Countries - List (tradingeconomics.com)



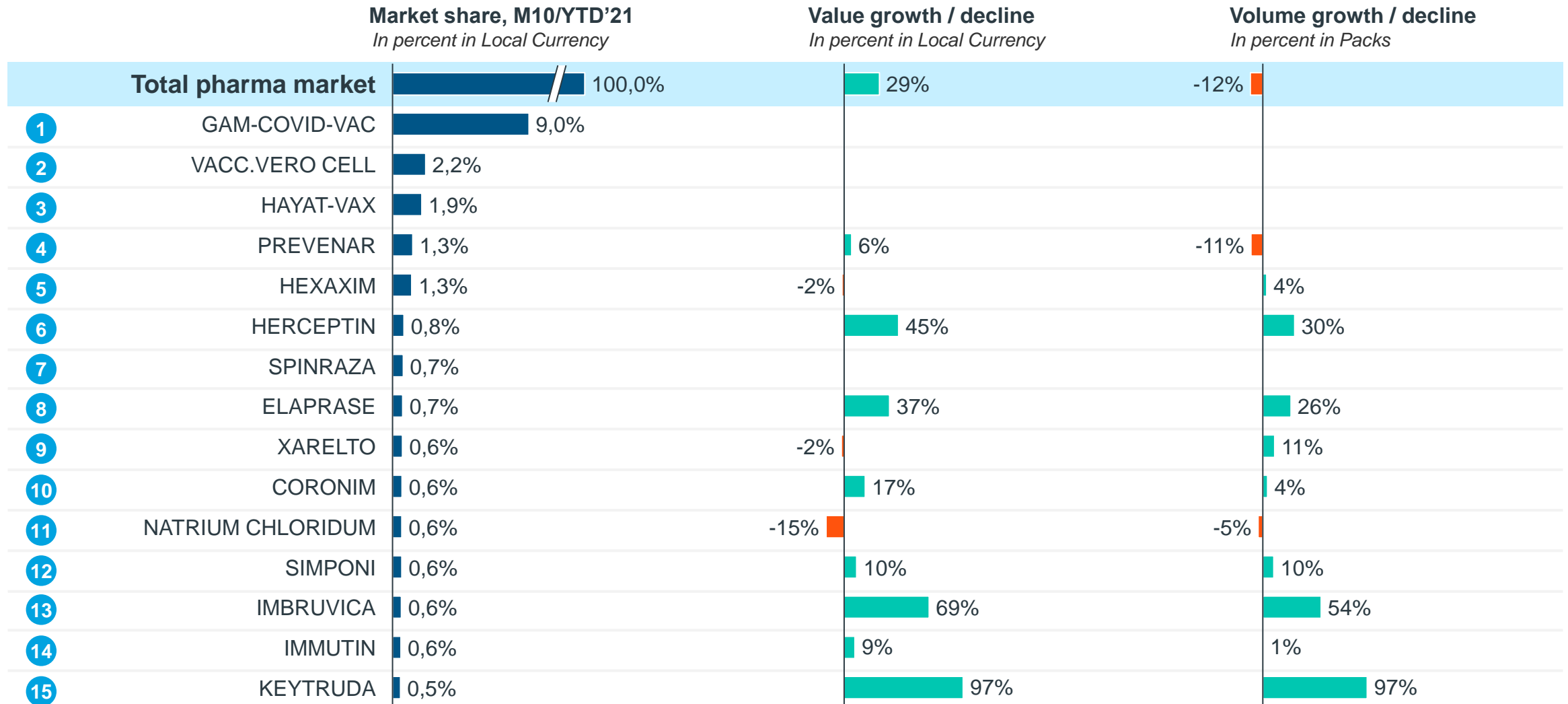
TOP-15 corporations on Kazakhstan market, Jan-Oct 2021



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



TOP-15 brands on Kazakhstan market, Jan-Oct 2021





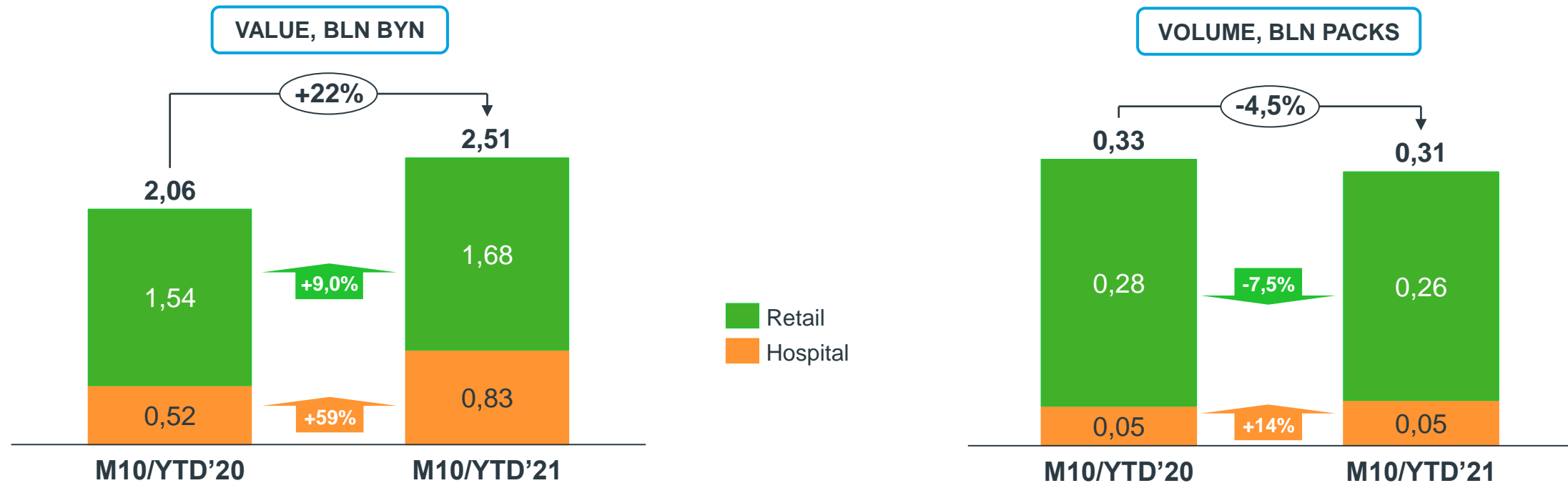
10,2%



INFLATION

Belarus pharma market growth in Jan-Oct 2021

Market grew by 22% in value and decreased by 4,5% in volume

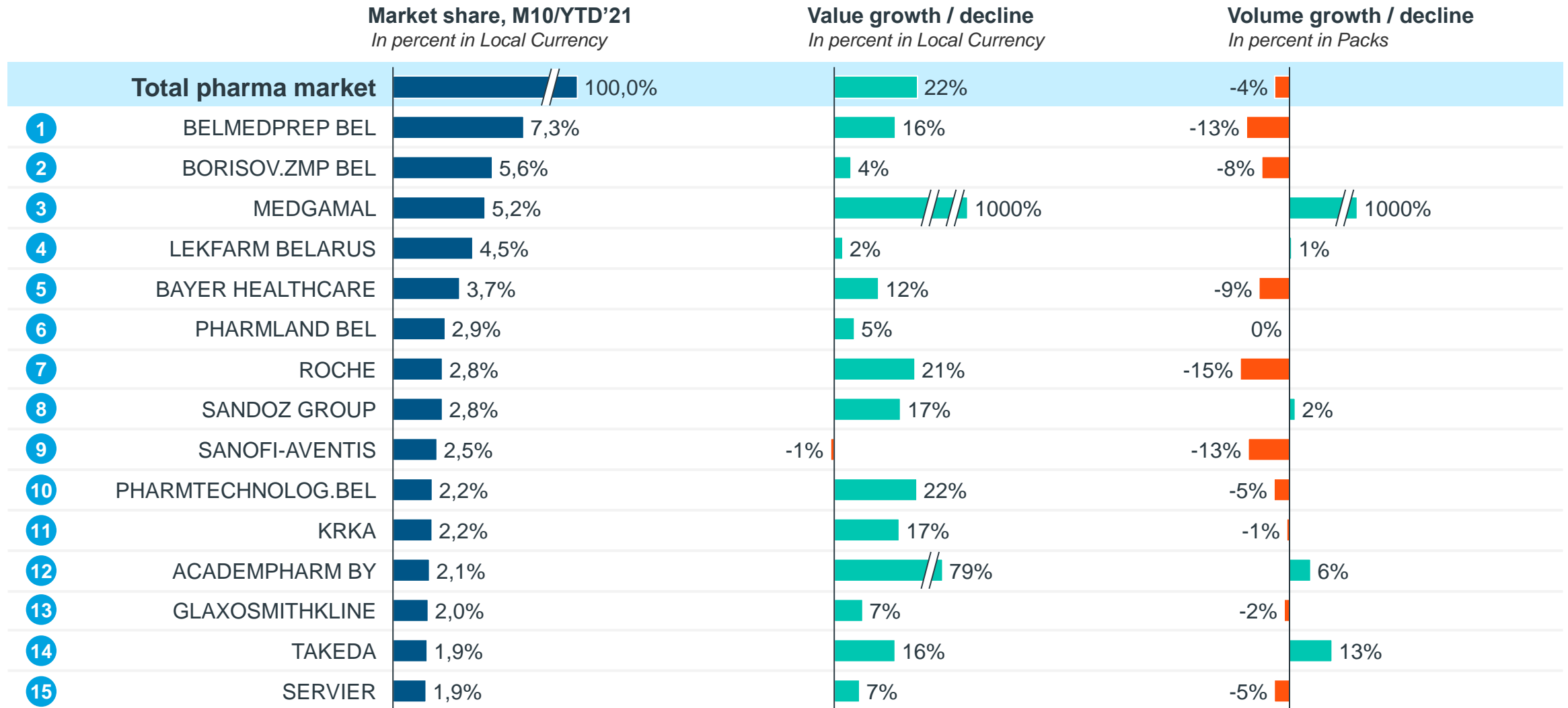


Indicator	BYN	USD	EUR	PACKS
Value M10/YTD'21, Bln.	2,51	0,99	0,83	0,31
Growth M10/YTD'21, %	▲ 22%	▲ 16%	▲ 9,7%	▼ -4,5%

Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices
[Inflation Rate: Countries - List \(tradingeconomics.com\)](https://tradingeconomics.com)



TOP-15 corporations on Belarus market, Jan-Oct 2021



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



TOP-15 brands on Belarus market, Jan-Oct 2021

	Market share, M10/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%	22%	-4%
1 GAM-COVID-VAC	5,1%		
2 XARELTO	2,0%	33%	16%
3 VAC.BBIBP CORV	1,7%		
4 ACTEMRA	1,2%	381	184
5 NATRIUM CHLORIDUM	0,8%	38%	21%
6 HEPARIN-BELMED	0,8%	1000%	1000%
7 RIVAXAN	0,7%	2 582%	2 420%
8 FRAXIPARINE	0,7%	130%	31%
9 PERJETA	0,6%	50%	32%
10 GRIPPOL PLUS	0,6%	13%	-9%
11 FRAGMIN	0,6%	124%	123%
12 AMLESSA	0,5%	31%	15%
13 ACC	0,5%	103%	74%
14 PROTAMIN-INSUL.	0,5%	30%	16%
15 VITAVIRIN	0,4%	478%	435%



10,8%



INFLATION

Uzbekistan pharma market growth in Jan-Oct 2021

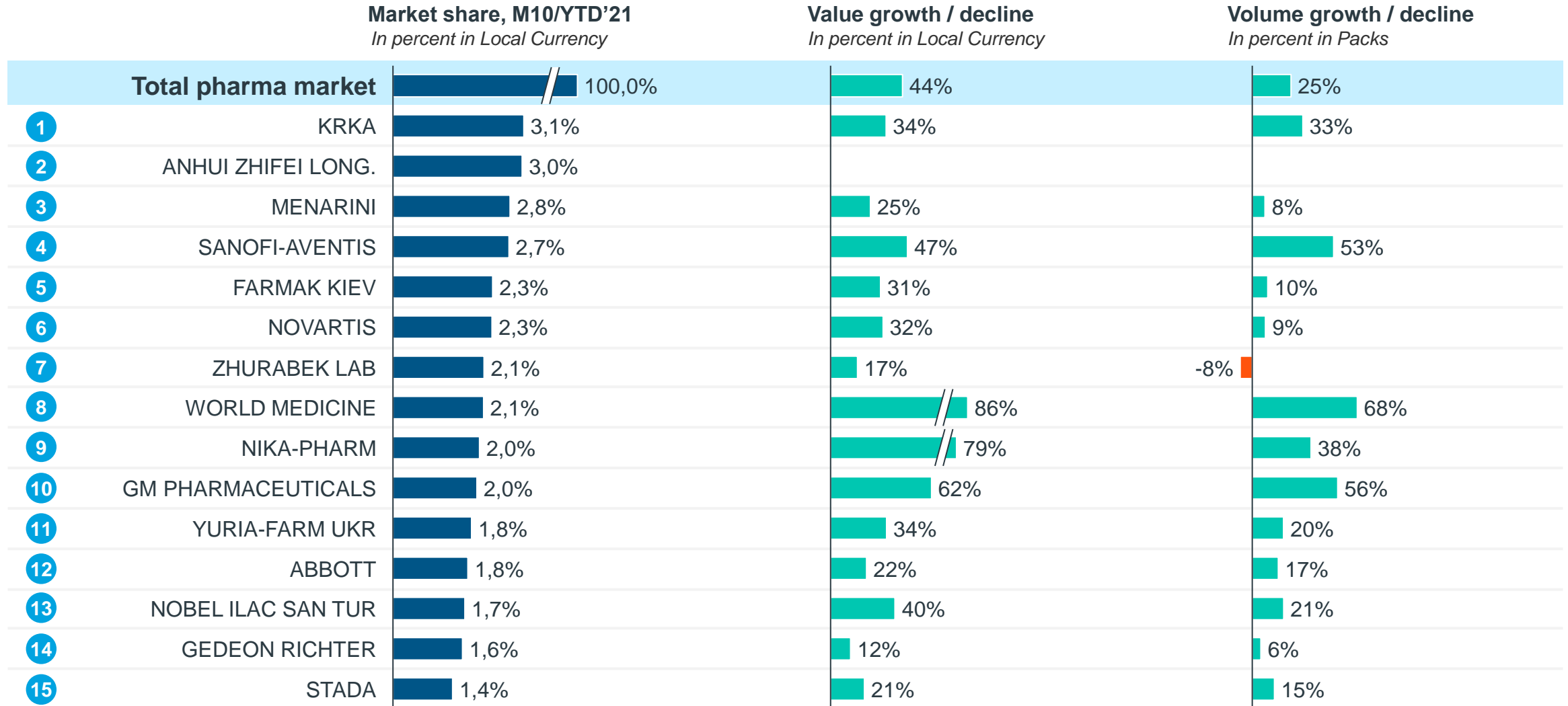
Market grew by 44% in value and by 25% in volume



Indicator	UZS	USD	EUR	PACKS
Value M10/YTD'21, Bln.	14 468	1,37	1,15	0,75
Growth M10/YTD'21, %	▲ 44%	▲ 37%	▲ 31%	▲ 25%



TOP-15 corporations on Uzbekistan market, Jan-Oct 2021



Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices
[Inflation Rate: Countries - List \(tradingeconomics.com\)](https://tradingeconomics.com)



TOP-15 brands on Uzbekistan market, Jan-Oct 2021

		Market share, M10/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%	44%	25%
1	ZF-UZ-VAC2001	3,0%		
2	CEFTRIAXONE	1,6%	136%	-3%
3	TRIMOL	1,0%	819%	859%
4	REMDESSA	0,8%	116%	209%
5	NIMESIL	0,7%	99%	98%
6	TIVORTIN	0,7%	64%	59%
7	QUPEN	0,7%	80%	78%
8	L-LYSINE AESCINATE	0,6%	12%	-2%
9	THERAFLU	0,6%	181%	175%
10	VIFERON	0,6%	41%	35%
11	ACTOVEGIN	0,5%	13%	4%
12	SERMIN	0,5%	85%	71%
13	AZIMAC	0,5%	50%	47%
14	TYLOLFEN HOT	0,5%	55%	40%
15	ACC	0,5%	47%	54%



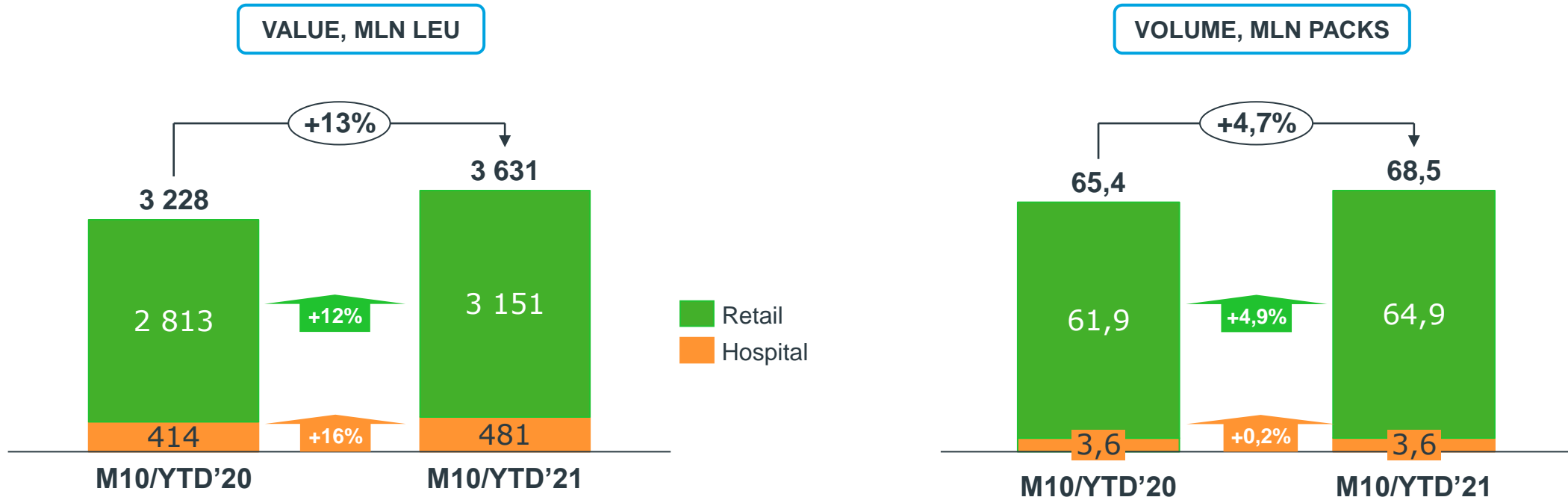
3,5%



INFLATION

Moldova pharma market growth in Jan-Oct 2021

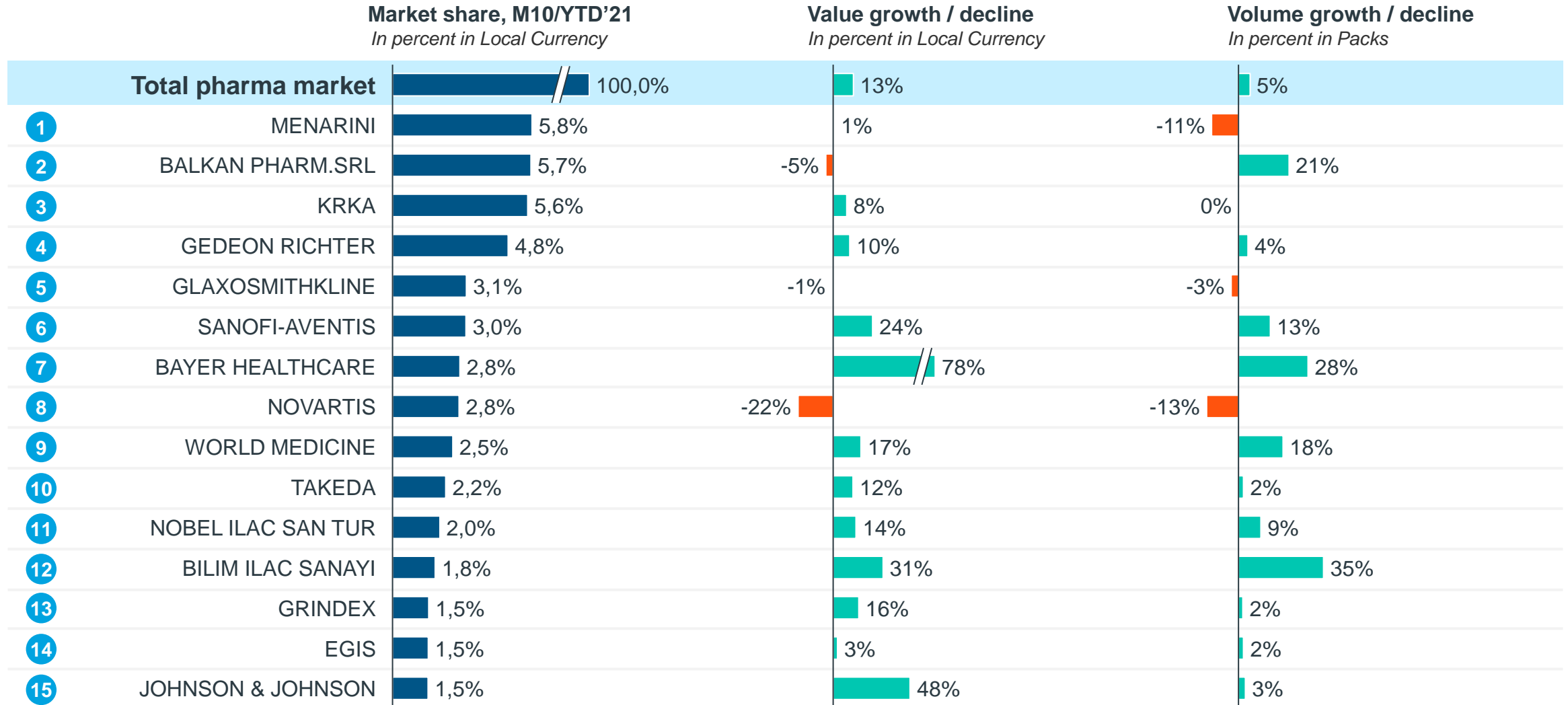
Market grew by 13% in value and by 4,7% in volume



Indicator	LEU	USD	EUR	PACKS
Value M10/YTD'21, Bln.	3 631	205,4	172,3	68,5
Growth M10/YTD'21, %	▲ 13%	▲ 10%	▲ 4,5%	▲ 4,7%

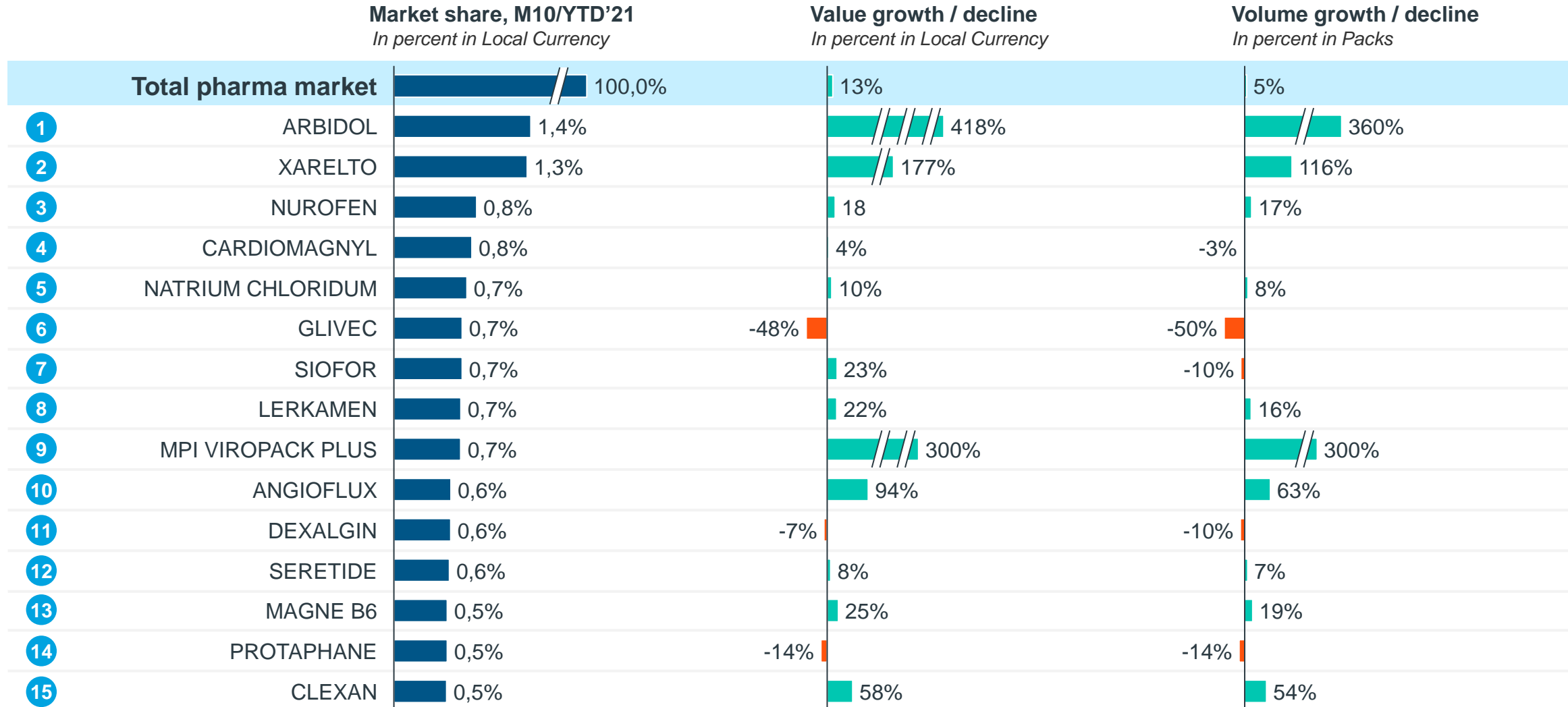


TOP-15 corporations on Moldova market, Jan-Oct 2021





TOP-15 brands on Moldova market, Jan-Oct 2021



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