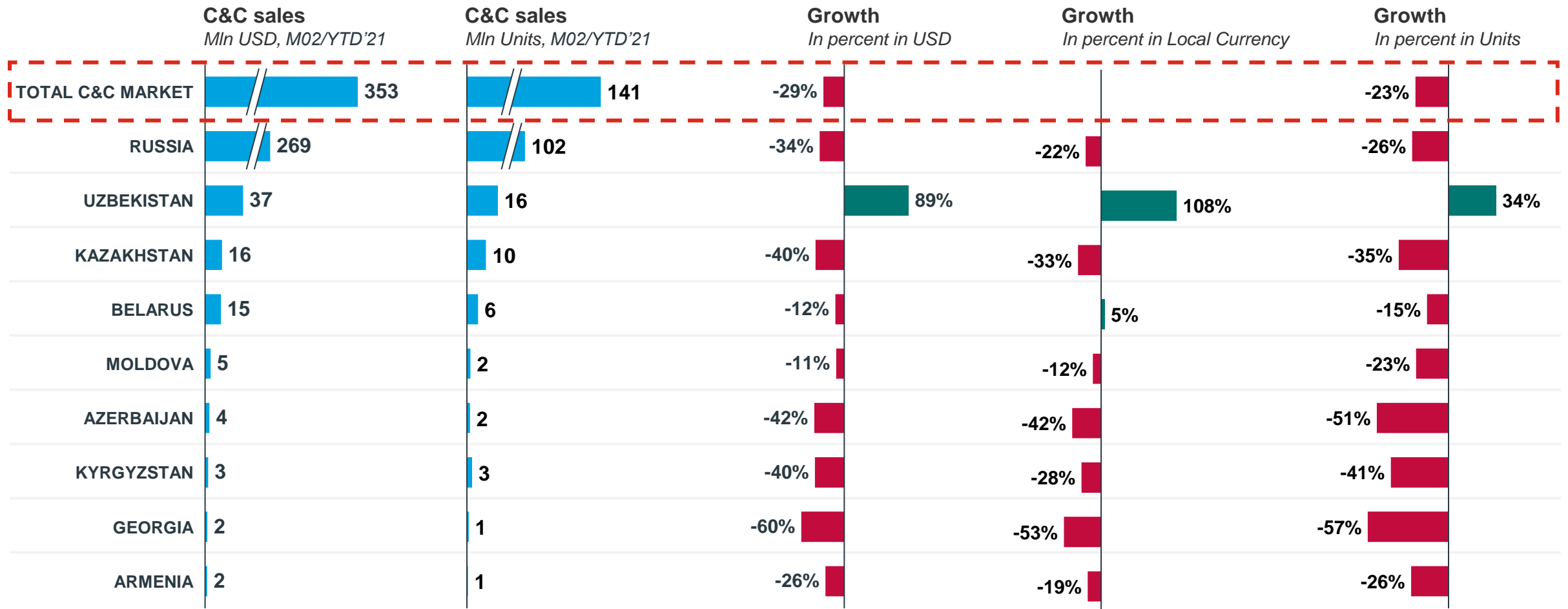


Facts from IQVIA

M02 2021

EAEU & CIS, Russia Cough&Cold category in January-February 2021, Value in Mln. USD and Units

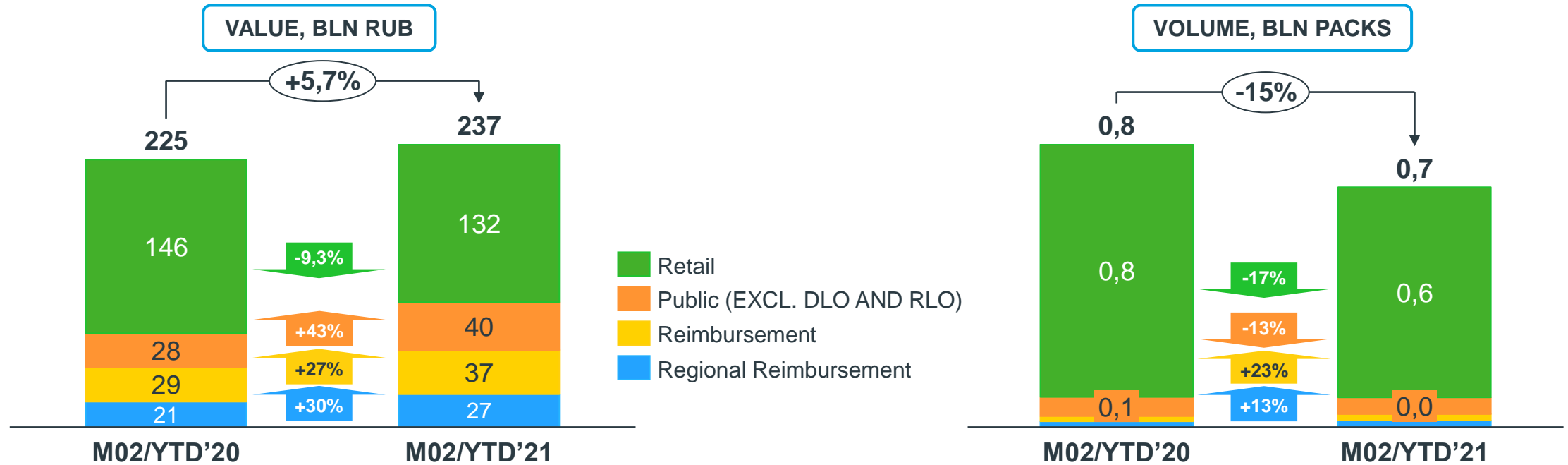
C&C decreased by 29% in USD and by 23% in volume





Russian pharma market growth in January-February 2021

Market grew by 5,7% in value and decreased by 15% in volume

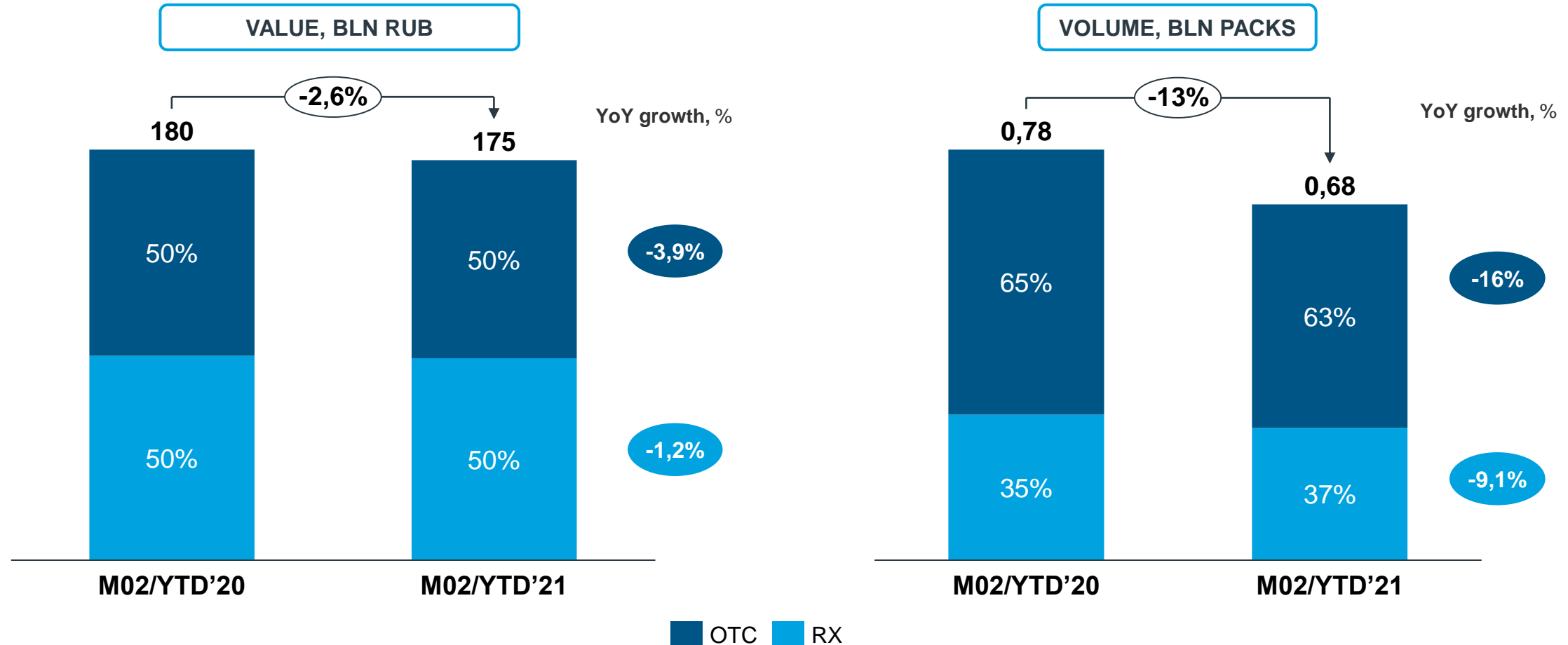


Indicator	RUB	USD	EUR	PACKS
Value M02/YTD'21, Bln.	237	3,2	2,6	0,7
Growth M02/YTD'21, %	▲ 5,7%	▼ -11%	▼ -19%	▼ -15%



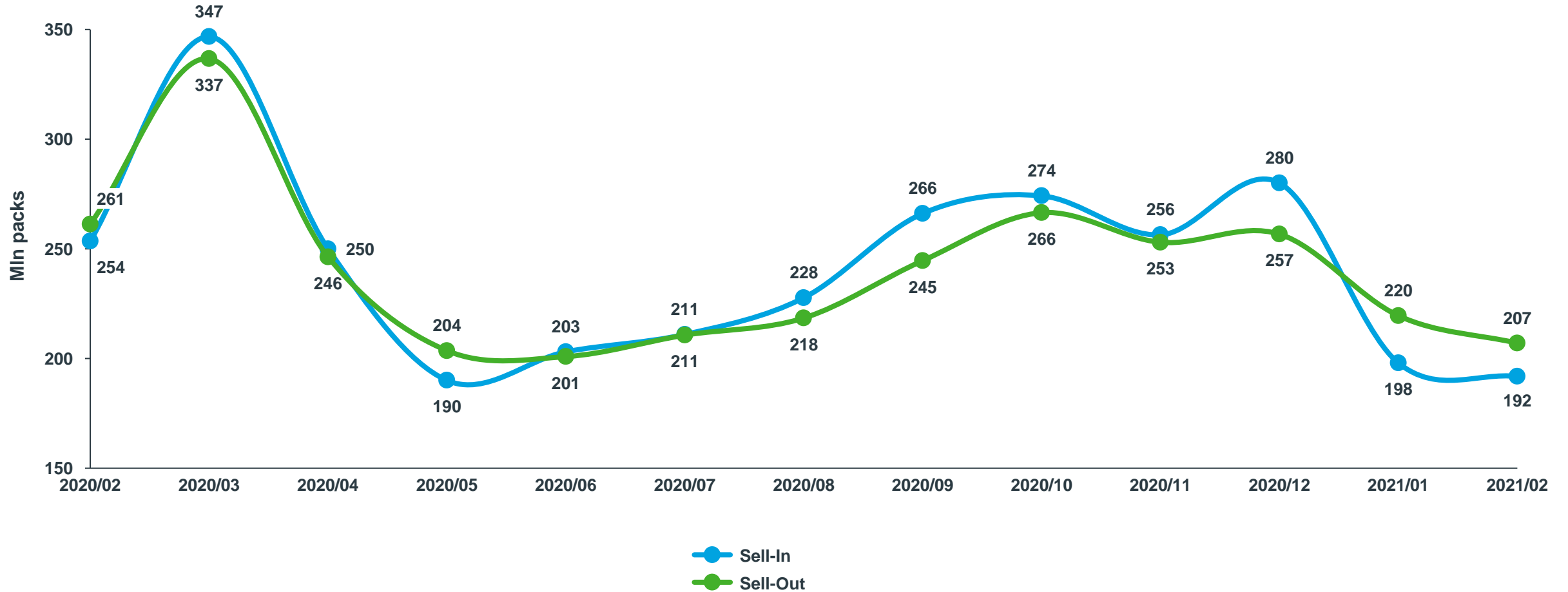
Russian pharma market growth in January-February 2021

Retail Sell-Out: Market decreased by 2,6% in value and by 13% in volume



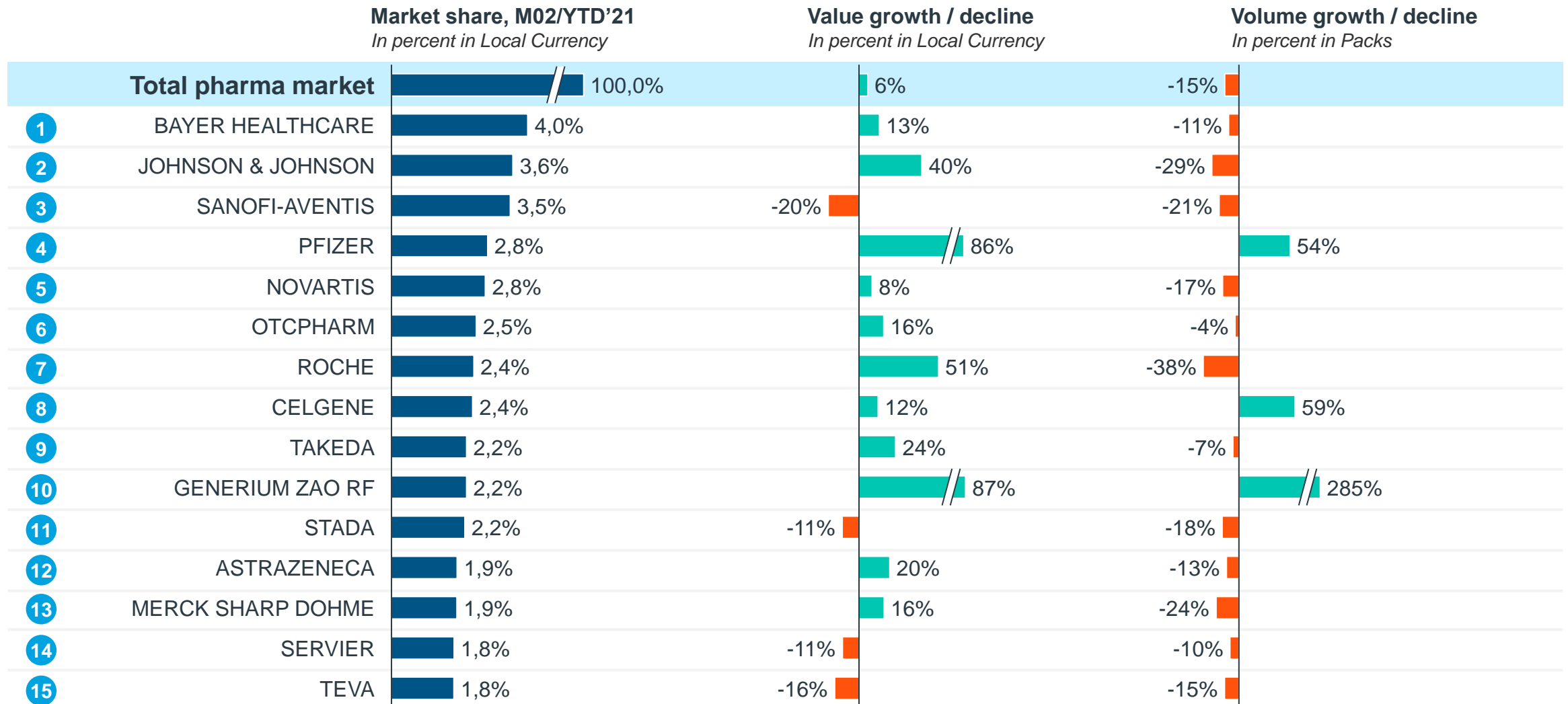


Sell-In vs Sell-Out, OTC registered drugs



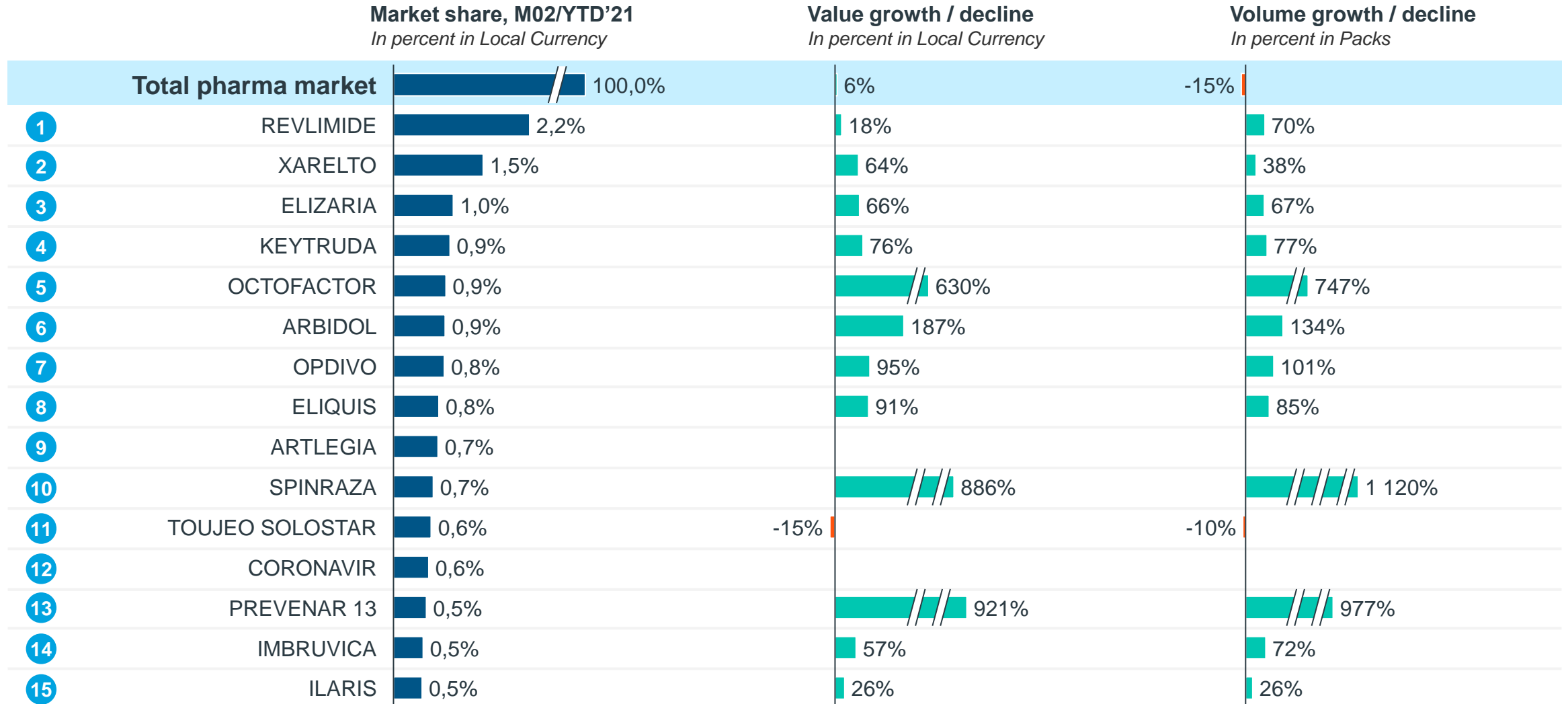


TOP-15 corporations on Russian market, January-February 2021

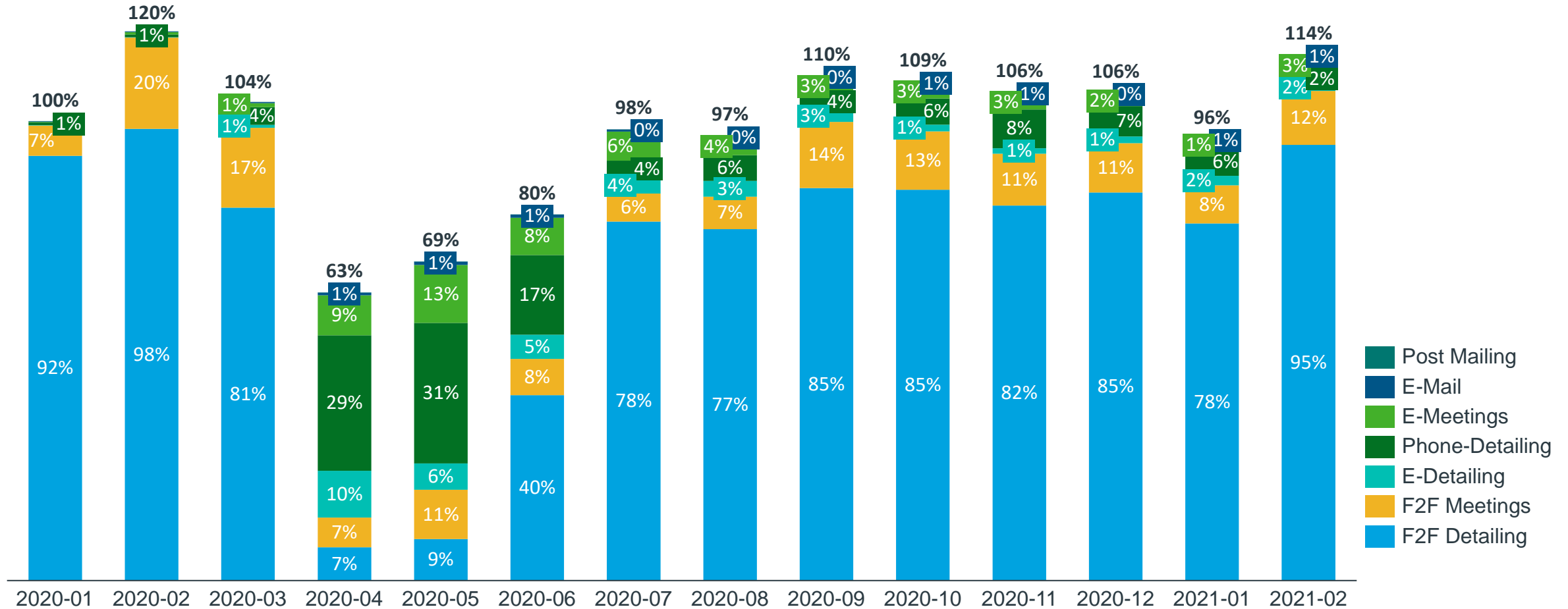




TOP-15 brands on Russian market, January-February 2021

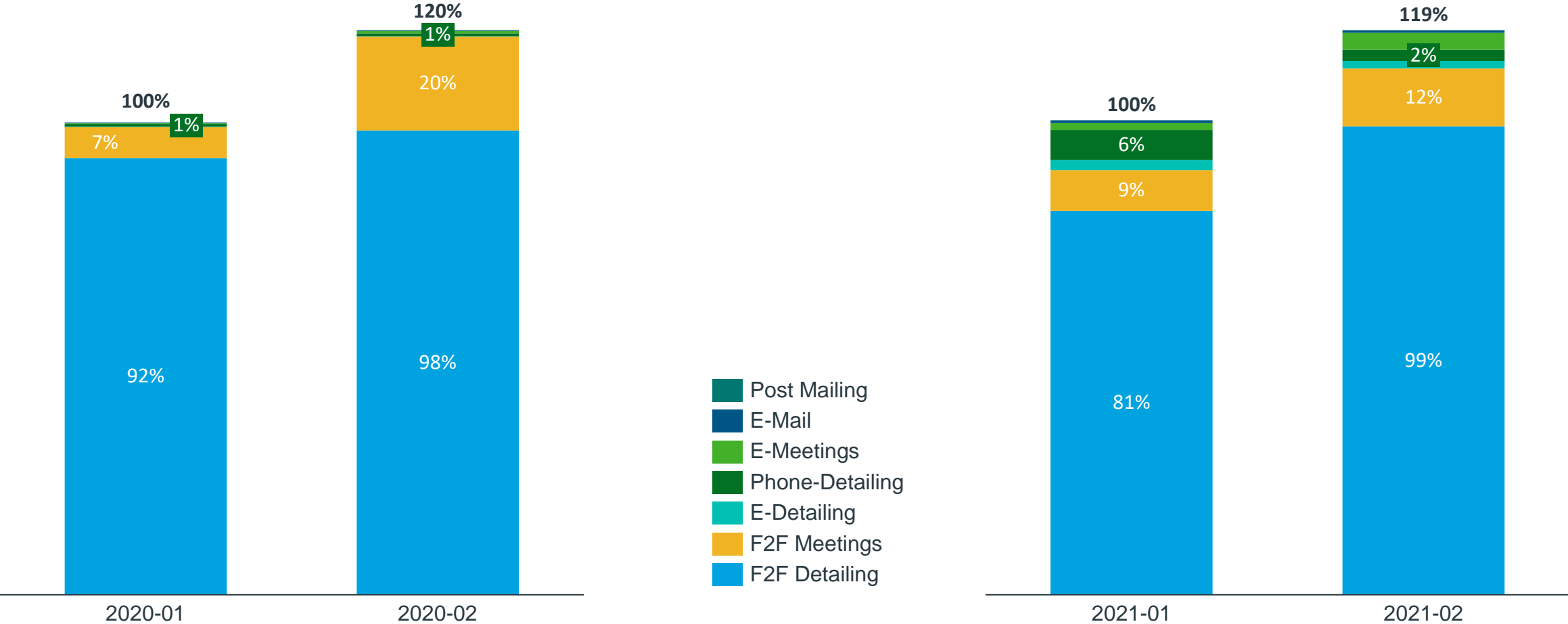


Index of promotional interactions by channel in Russia, January 2020 - February 2021



Source: IQVIA Russia, Channel Dynamics promo evaluation

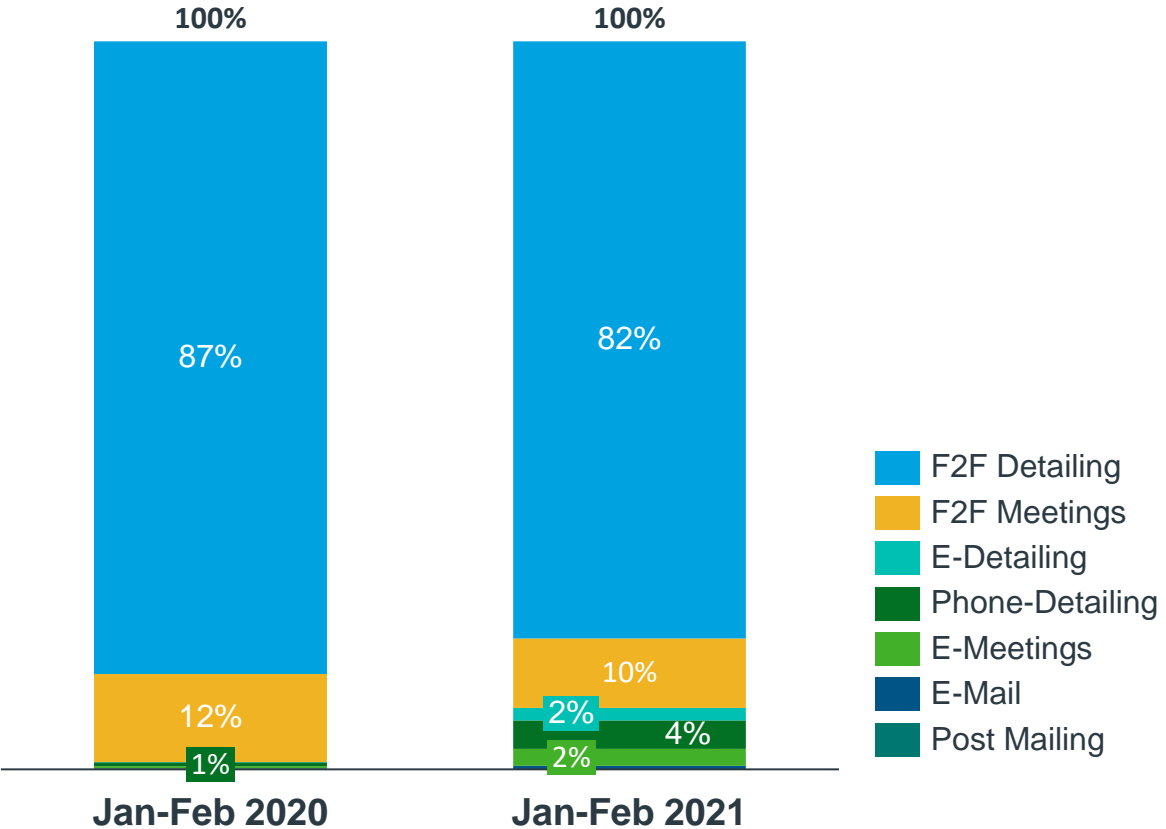
Index of promotional interactions by channel in Russia, January-February 2020 & 2021



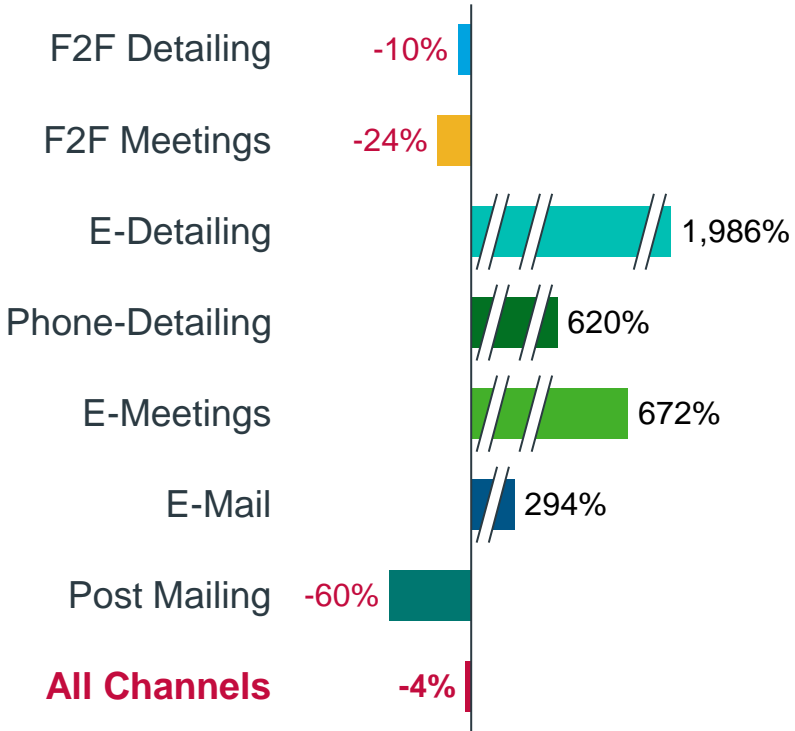
Source: IQVIA Russia, Channel Dynamics promo evaluation

Total Market overall promotional volume declined by 4%, Jan-Feb 2021 vs 2020

Promotional volume share by channel

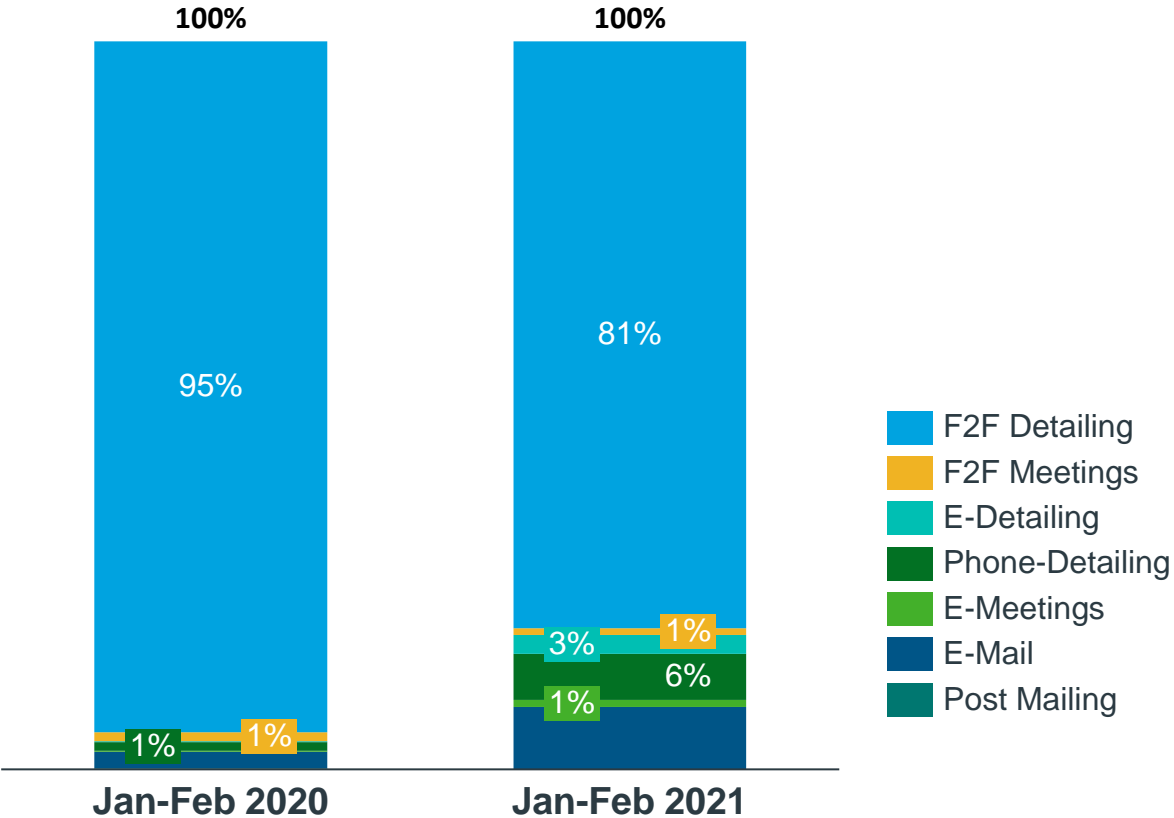


% Changes in promotional volume by channel
Jan-Feb 2021 vs 2020

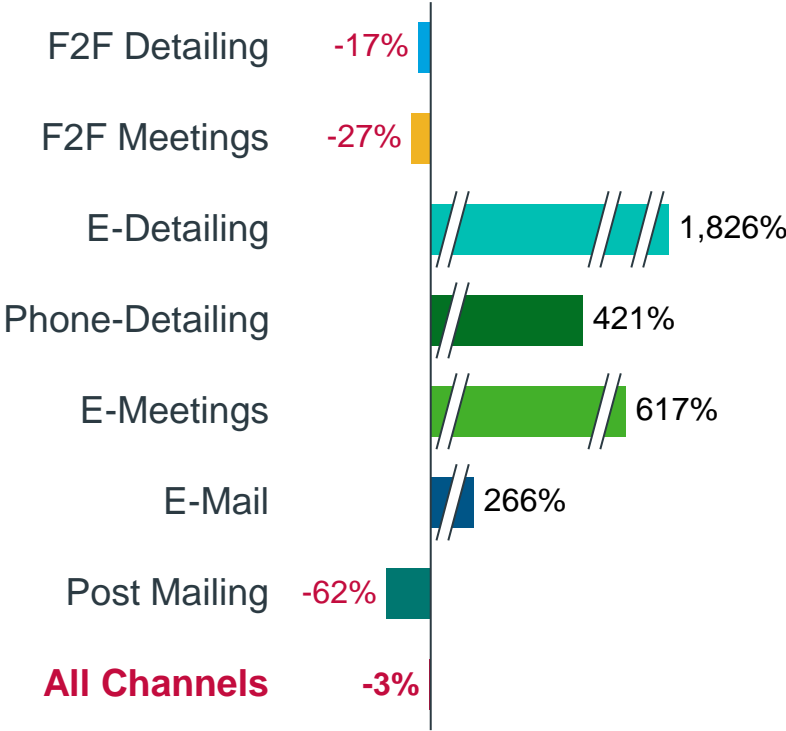


Total Market overall promotional volume (contacts) declined by 3%, Jan-Feb 2021 vs 2020

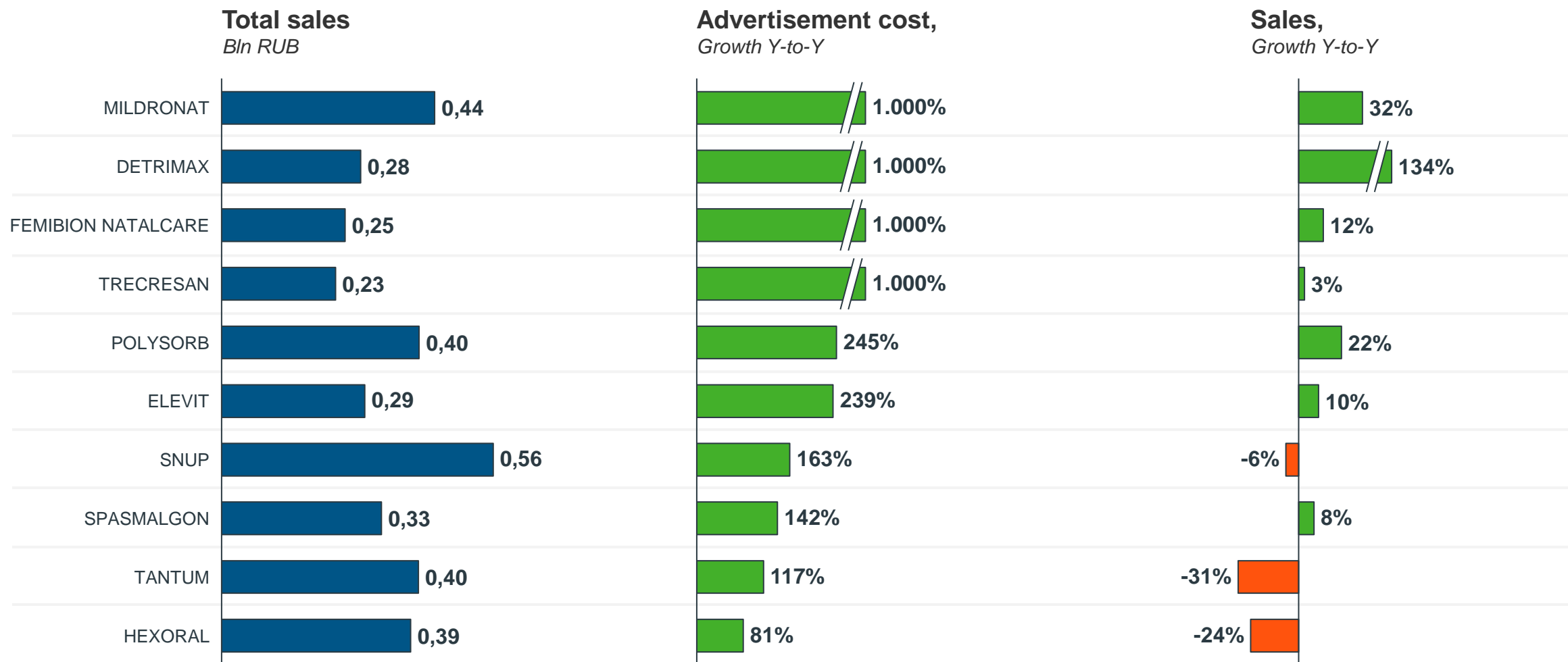
Promotional volume (contacts) share by channel



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

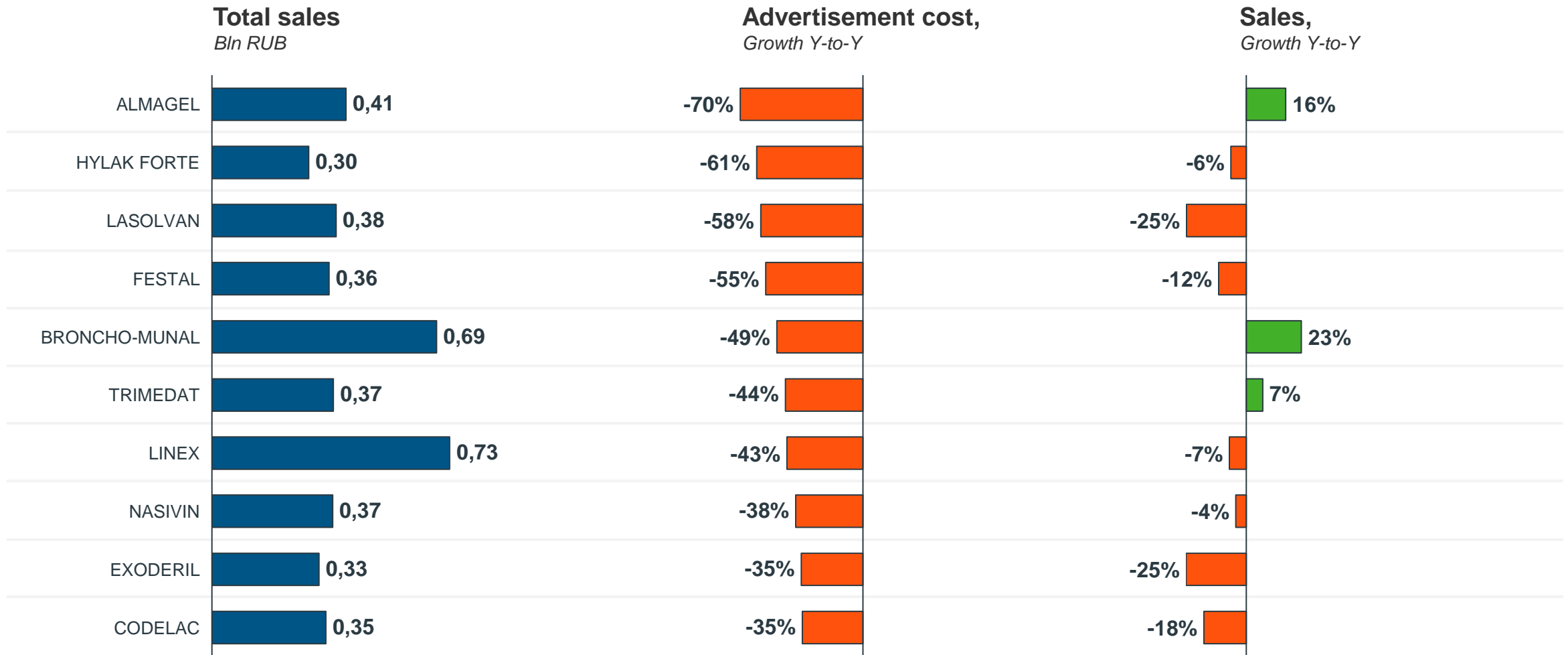


TOP-10 products by growth in advertisement investments in January-February 2021



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-February 2021

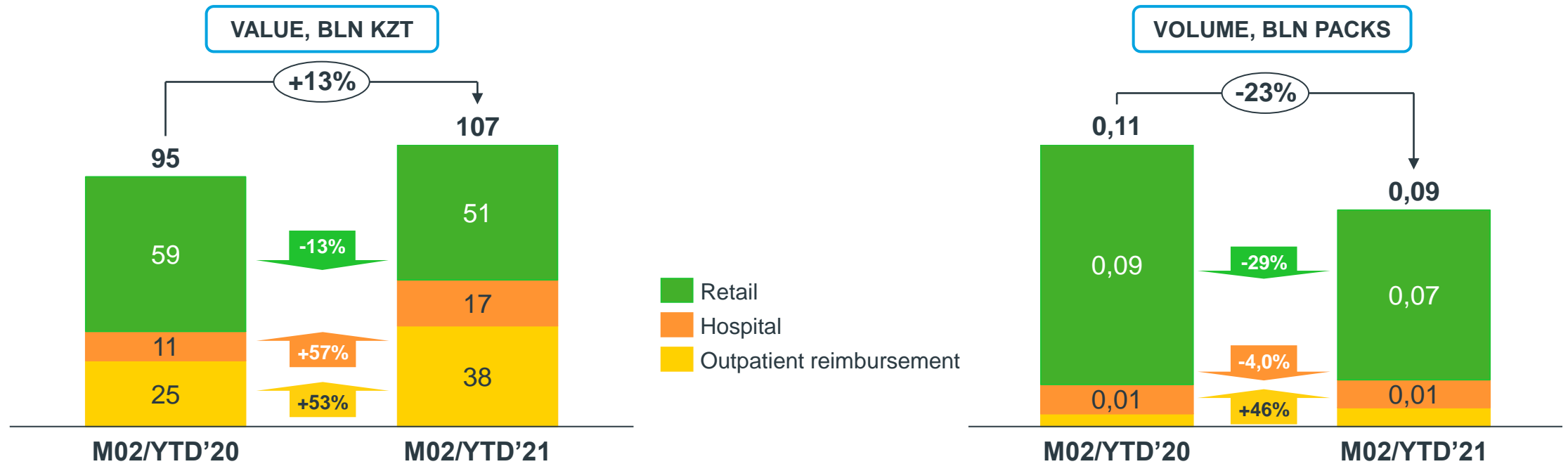


The rank is calculated among TOP-200 Brands by sales with advertising cost greater than 50 mln RUB
 Source: IQVIA databases, Pharamtrend, Mediascope data, FIN Prices



Kazakhstan pharma market growth in January-February 2021

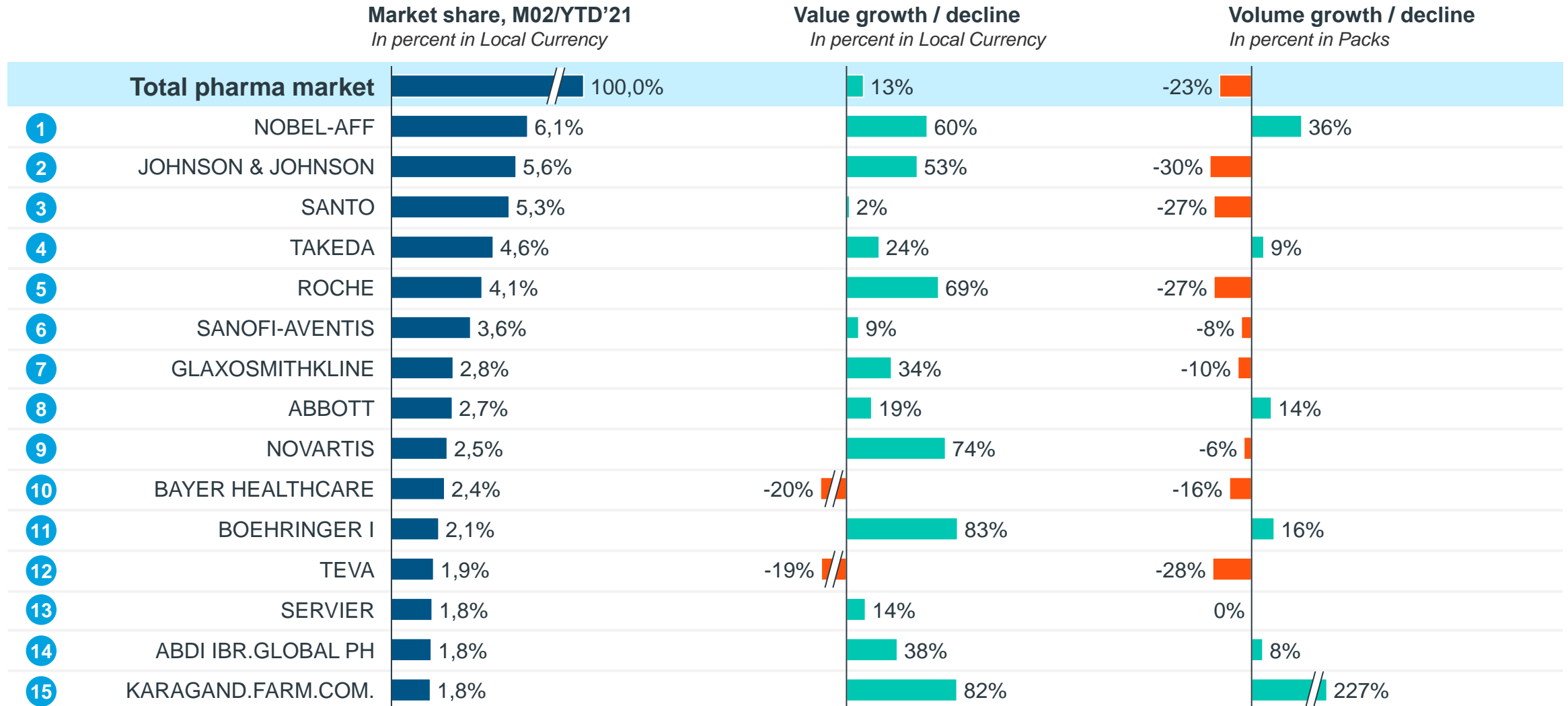
Market grew by 13% in value and decreased by 23% in volume



Indicator	KZT	USD	EUR	PACKS
Value M02/YTD'21, Bln.	107	0,26	0,21	0,09
Growth M02/YTD'21, %	▲ 13%	▲ 1,7%	▼ -7,8%	▼ -23%

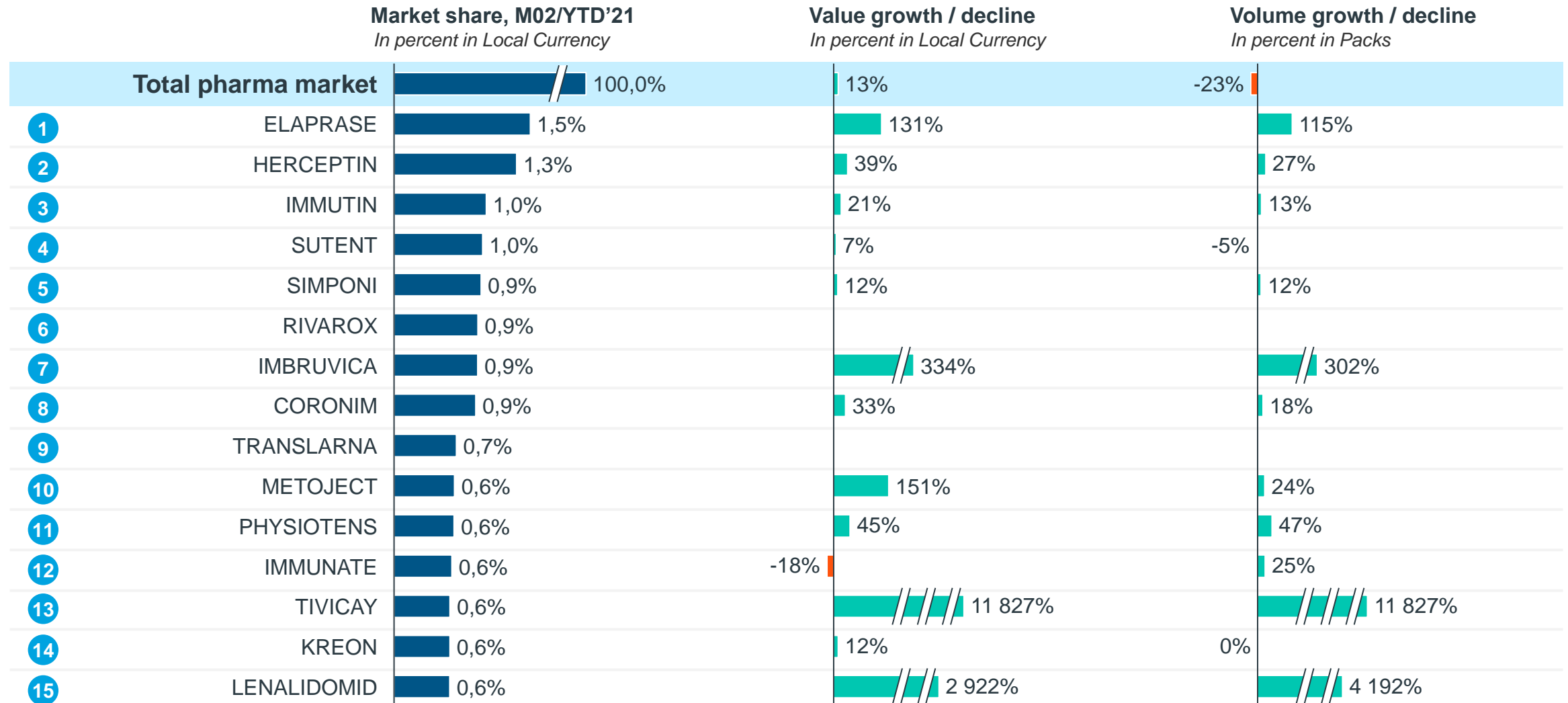


TOP-15 corporations on Kazakhstan market, January-February 2021





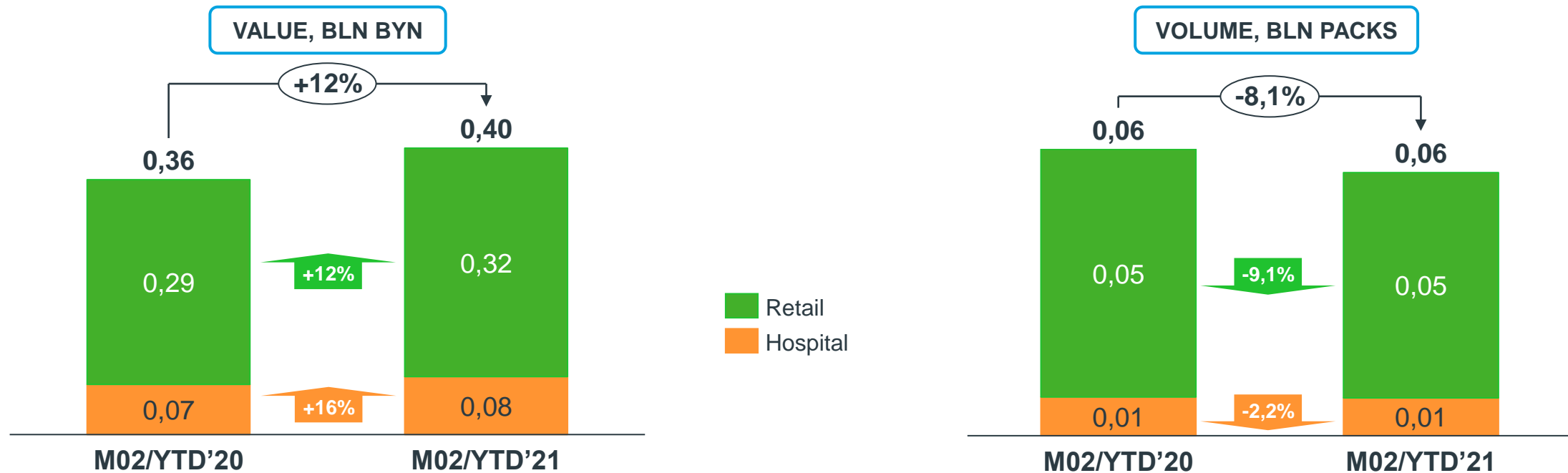
TOP-15 brands on Kazakhstan market, January-February 2021





Belarus pharma market growth in January-February 2021

Market grew by 12% in value and decreased by 8,1% in volume



Indicator	BYN	USD	EUR	PACKS
Value M02/YTD'21, Bln.	0,40	0,16	0,13	0,06
Growth M02/YTD'21, %	▲ 12%	▼ -6,4%	▼ -15%	▼ -8,1%



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

		Market share, M02/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%	12%	-8%
1	BELMEDPREP BEL	7,8%	19%	-17%
2	BORISOV.ZMP BEL	6,3%	-1%	-6%
3	BAYER HEALTHCARE	5,9%	91%	13%
4	LEKFARM BELARUS	5,3%	8%	10%
5	PHARMLAND BEL	3,3%	-2%	-4%
6	SANDOZ GROUP	3,2%	19%	-3%
7	GLAXOSMITHKLINE	2,8%	38%	1%
8	KRKA	2,6%	15%	-5%
9	PHARMTECNOLOG.BEL	2,5%	13%	-14%
10	SANOFI-AVENTIS	2,5%	-22%	-30%
11	MINSKINTERCAPS	2,4%	5%	-3%
12	SERVIER	2,3%	22%	-2%
13	ACADEMPHARM BY	2,3%	110%	24%
14	ROCHE	2,2%	234%	-2%
15	MENARINI	2,1%	4%	-23%



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

		Market share, M02/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%	12%	-8%
1	XARELTO	3,7%	224%	112%
2	ACTEMRA	1,4%	3 592%	950%
3	ENOXAPARIN S.K.	1,0%		
4	RIVAXAN	0,9%		
5	HEPARIN-BELMED	0,9%	760%	308%
6	NATRIUM CHLORIDUM	0,9%	16%	0%
7	SIRTURO	0,7%	447%	550%
8	ACC	0,7%	115%	61%
9	AMLESSA	0,6%	43%	15%
10	CEREPRO	0,6%	-11%	-25%
11	SERETIDE	0,6%	71%	36%
12	ADVAGRAF	0,6%	-55%	-22%
13	PRIORIX	0,6%	293%	301%
14	CARDIOMAGNYL	0,5%	136%	74%
15	MILDRONAT	0,4%	71%	34%



Uzbekistan pharma market growth in January-February 2021

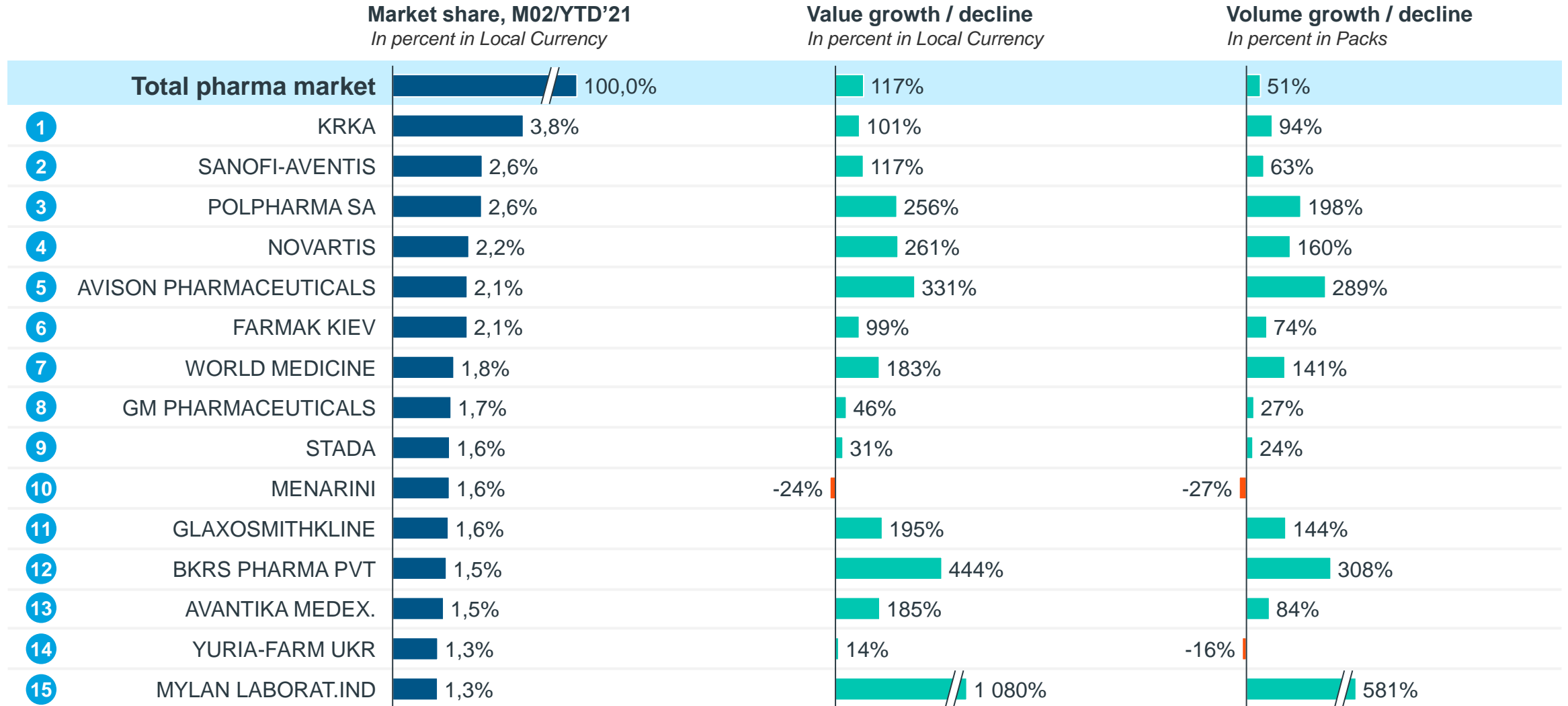
Market grew by 117% in value and by 51% in volume



Indicator	UZS	USD	EUR	PACKS
Value M02/YTD'21, Bln.	2 931	0,28	0,23	0,16
Growth M02/YTD'21, %	▲ 117%	▲ 97%	▲ 80%	▲ 51%



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





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

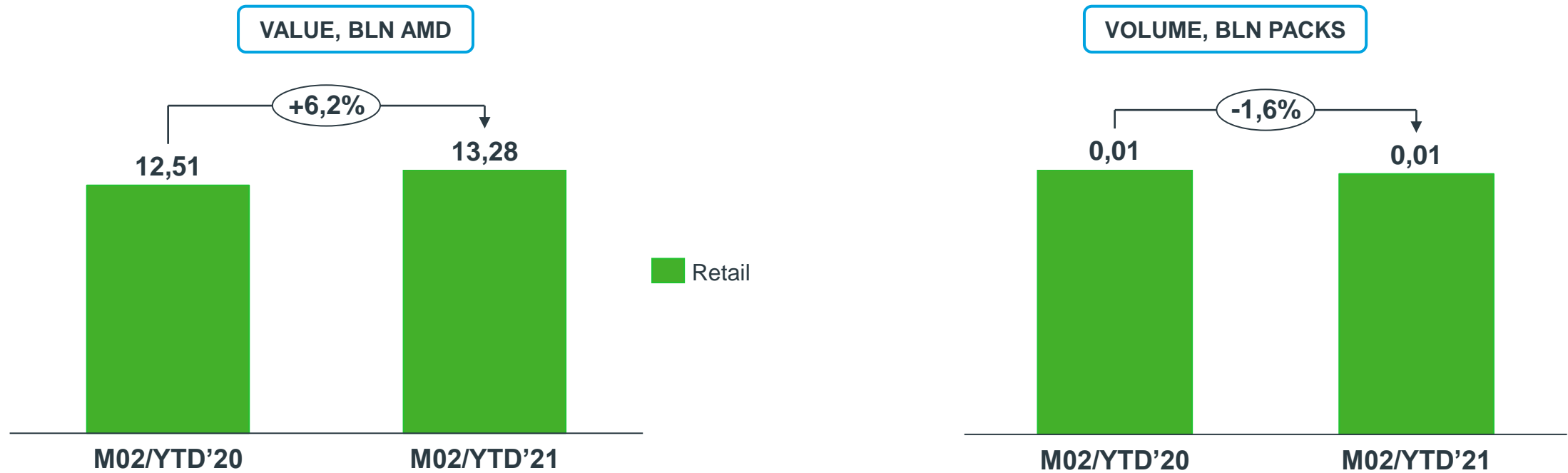
		Market share, M02/YTD'21 <i>In percent in Local Currency</i>	Value growth / decline <i>In percent in Local Currency</i>	Volume growth / decline <i>In percent in Packs</i>
Total pharma market		100,0%	117%	51%
1	THERAFLU	1,3%	279%	268%
2	QUPEN	1,3%	327%	349%
3	AQUADETRIM	1,3%	637%	397%
4	DESREM	1,0%		
5	CEFTRIAXONE	0,9%	52%	-30%
6	ACC	0,8%	574%	451%
7	ACTOVEGIN	0,7%	30%	29%
8	PNEUMOCOCCAL VACCINE	0,7%		
9	HEPARIN	0,7%	547%	31%
10	CLEXANE	0,7%	780%	649%
11	CEFOPERAZONE+SULBACTAM	0,6%		
12	AZIMAC	0,6%	179%	136%
13	ACEFENAC	0,6%		
14	CANEPHRON N	0,6%	158%	161%
15	DEXAMETHASONE	0,6%	274%	125%

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



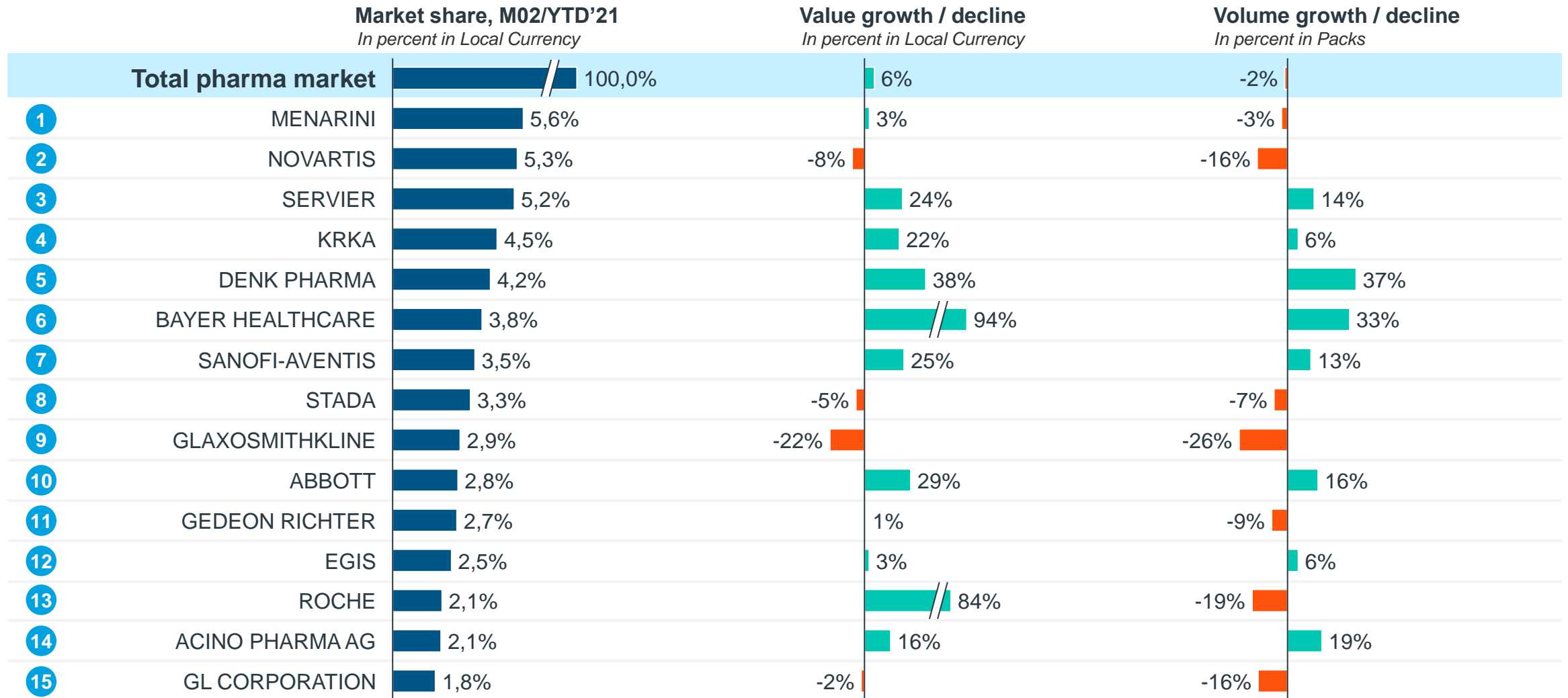
Armenia pharma market growth in January-February 2021

Market increased by 6,2% in value and decreased by 1,6% in volume



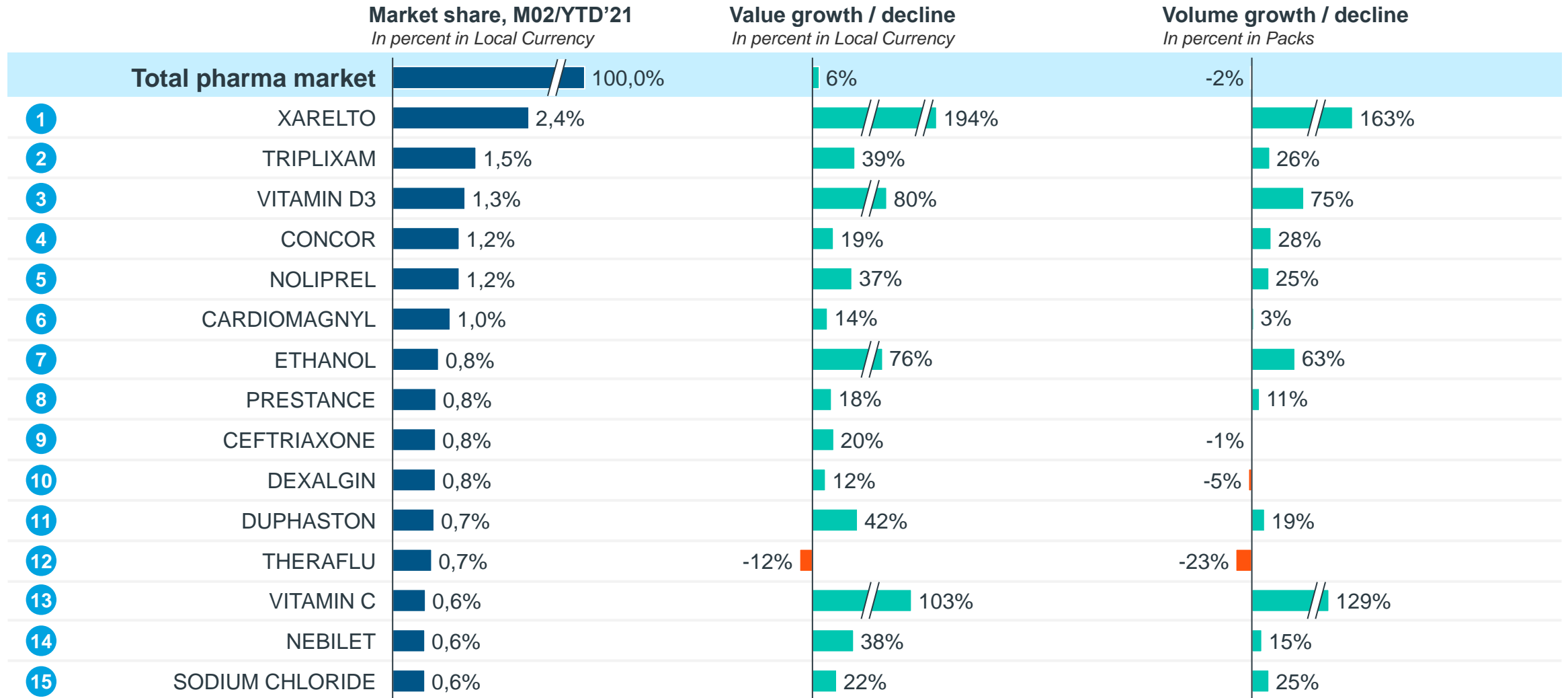
Indicator	AMD	USD	EUR	PACKS
Value M02/YTD'21, Bln.	13,28	0,03	0,02	0,01
Growth M02/YTD'21, %	▲ 6,2%	▼ -2,6%	▼ -12%	▼ -1,6%

TOP-15 corporations on Armenia market, January-February 2021





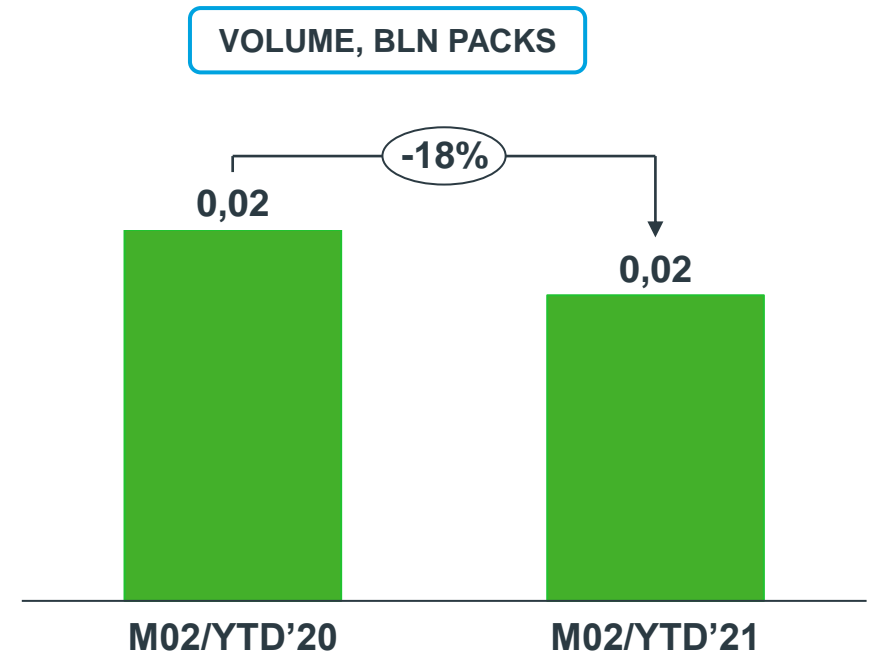
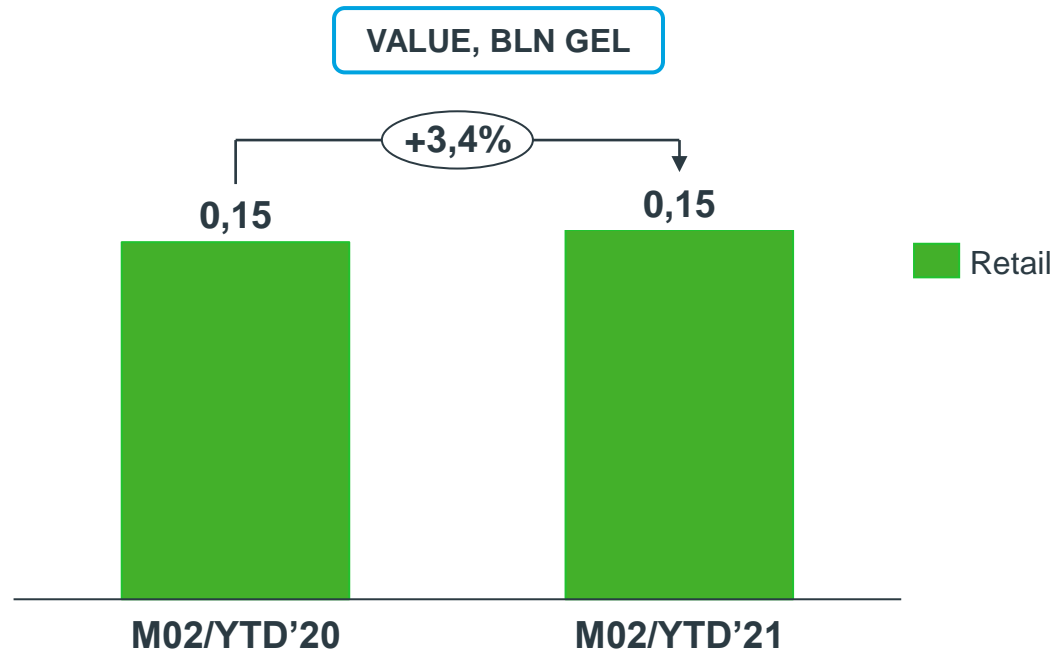
TOP-15 brands on Armenia market, January-February 2021





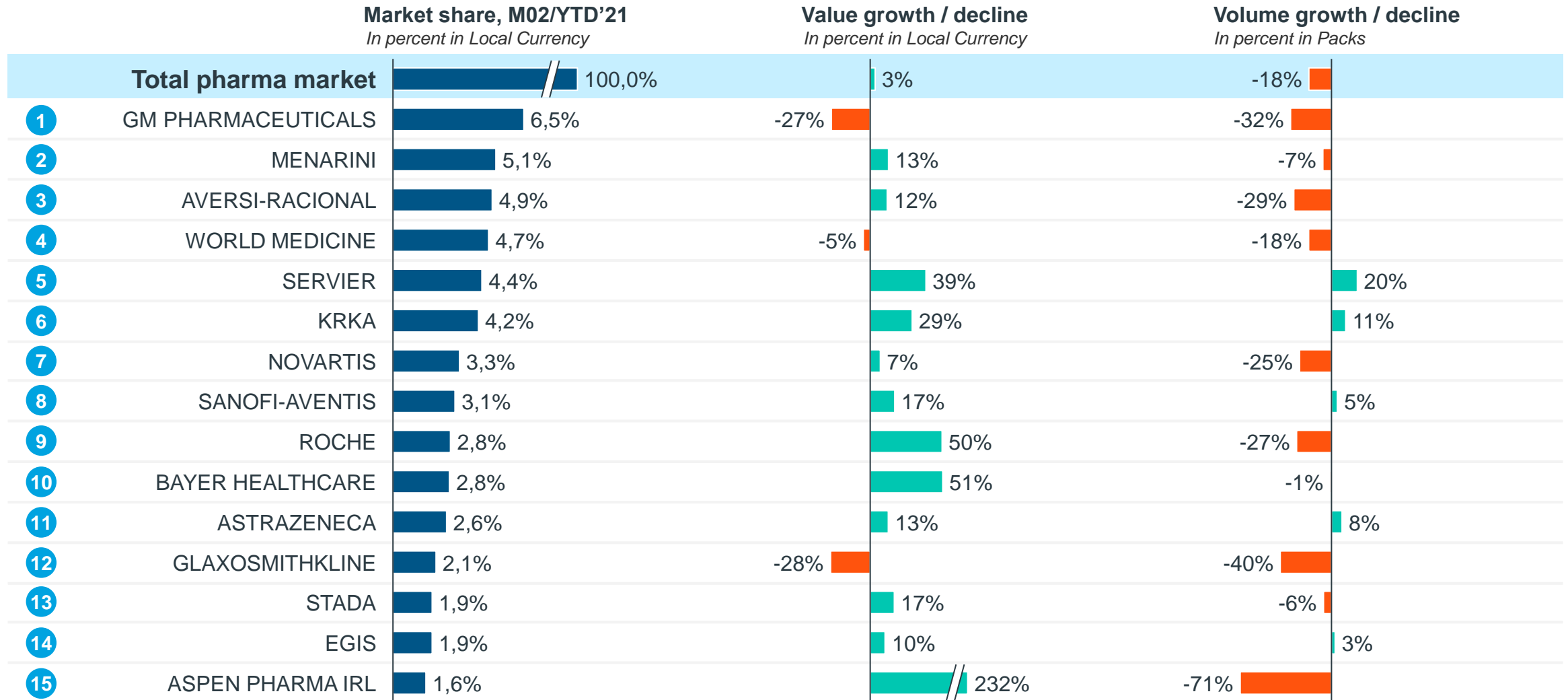
Georgia pharma market growth in January-February 2021

Market grew by 3,4% in value and decreased by 18% in volume



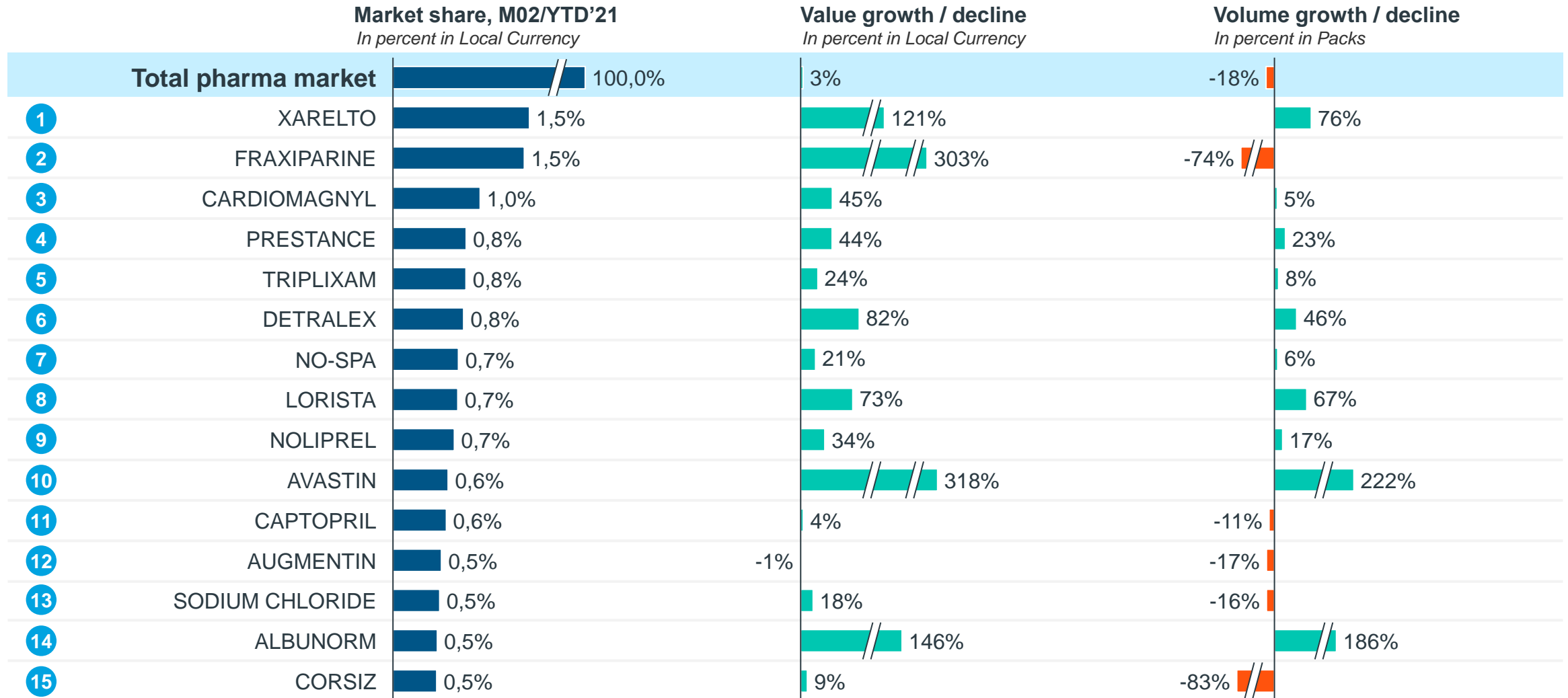
Indicator	GEL	USD	EUR	PACKS
Value M02/YTD'21, Bln.	0,15	0,05	0,04	0,02
Growth M02/YTD'21, %	▲ 3,4%	▼ -10%	▼ -19%	▼ -18%

TOP-15 corporations on Georgia market, January-February 2021





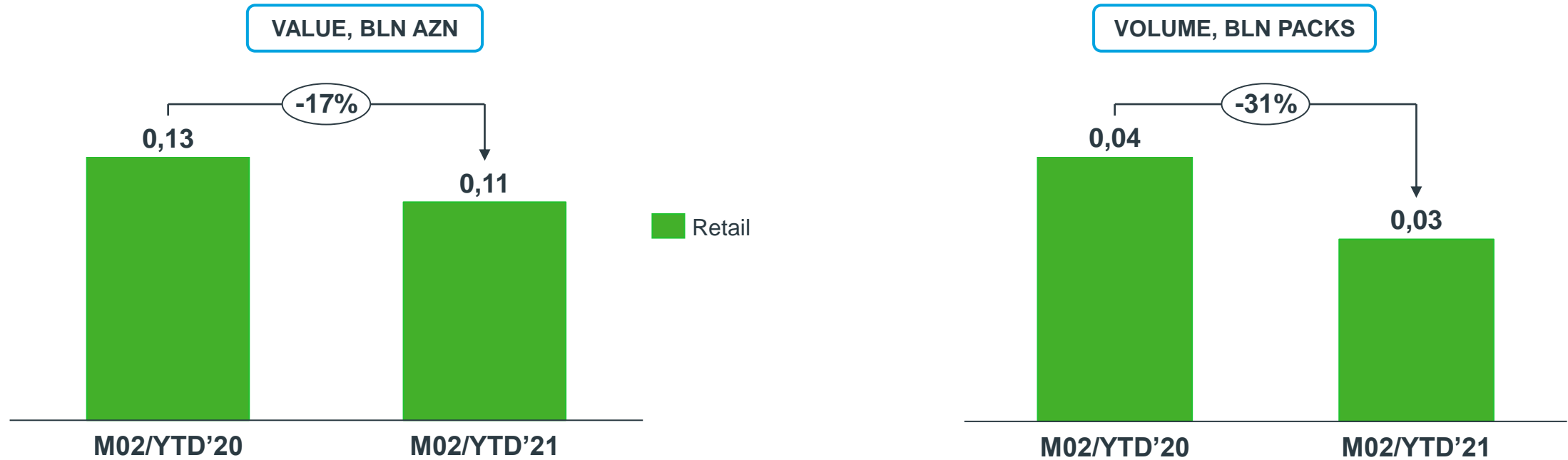
TOP-15 brands on Georgia market, January-February 2021





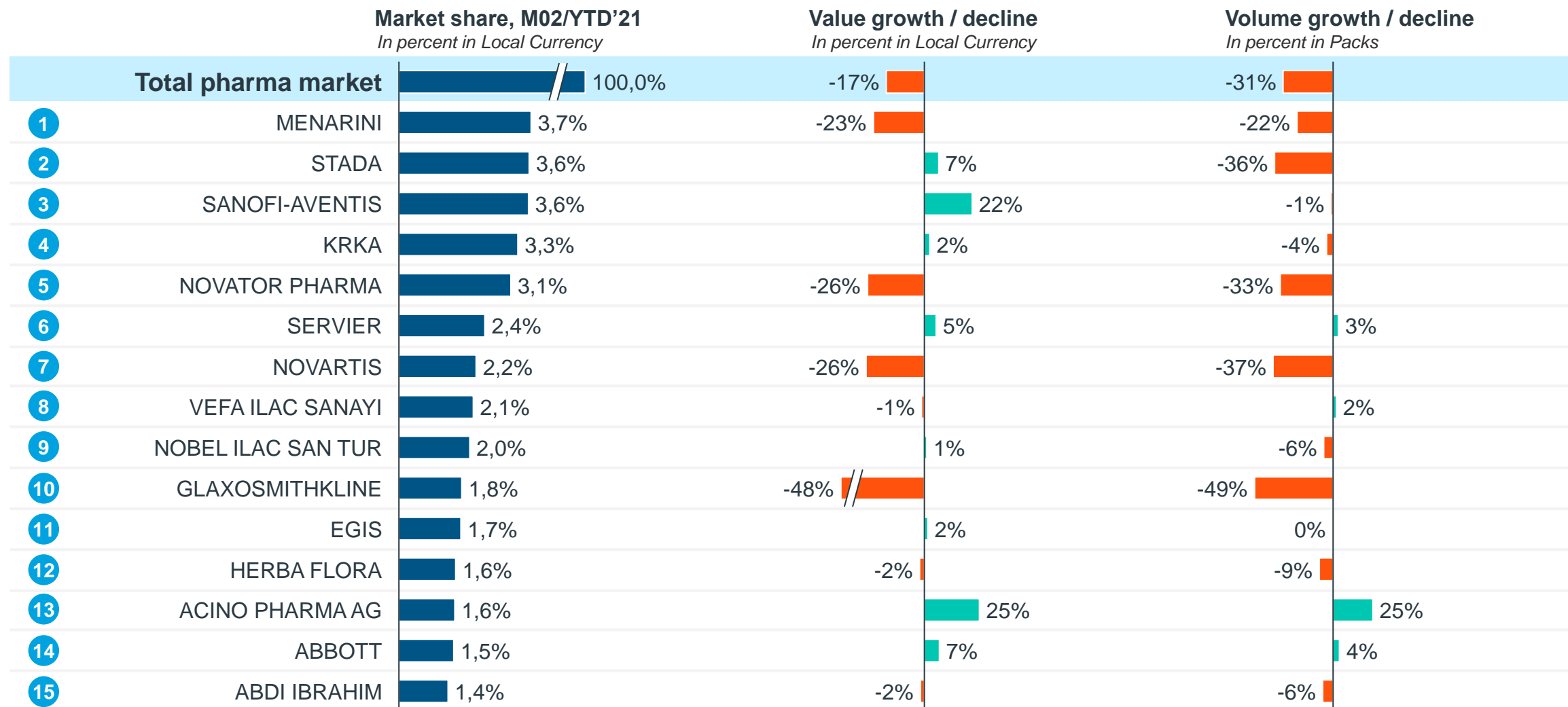
Azerbaijan pharma market growth in January-February 2021

Market decreased by 17% in value and by 31% in volume

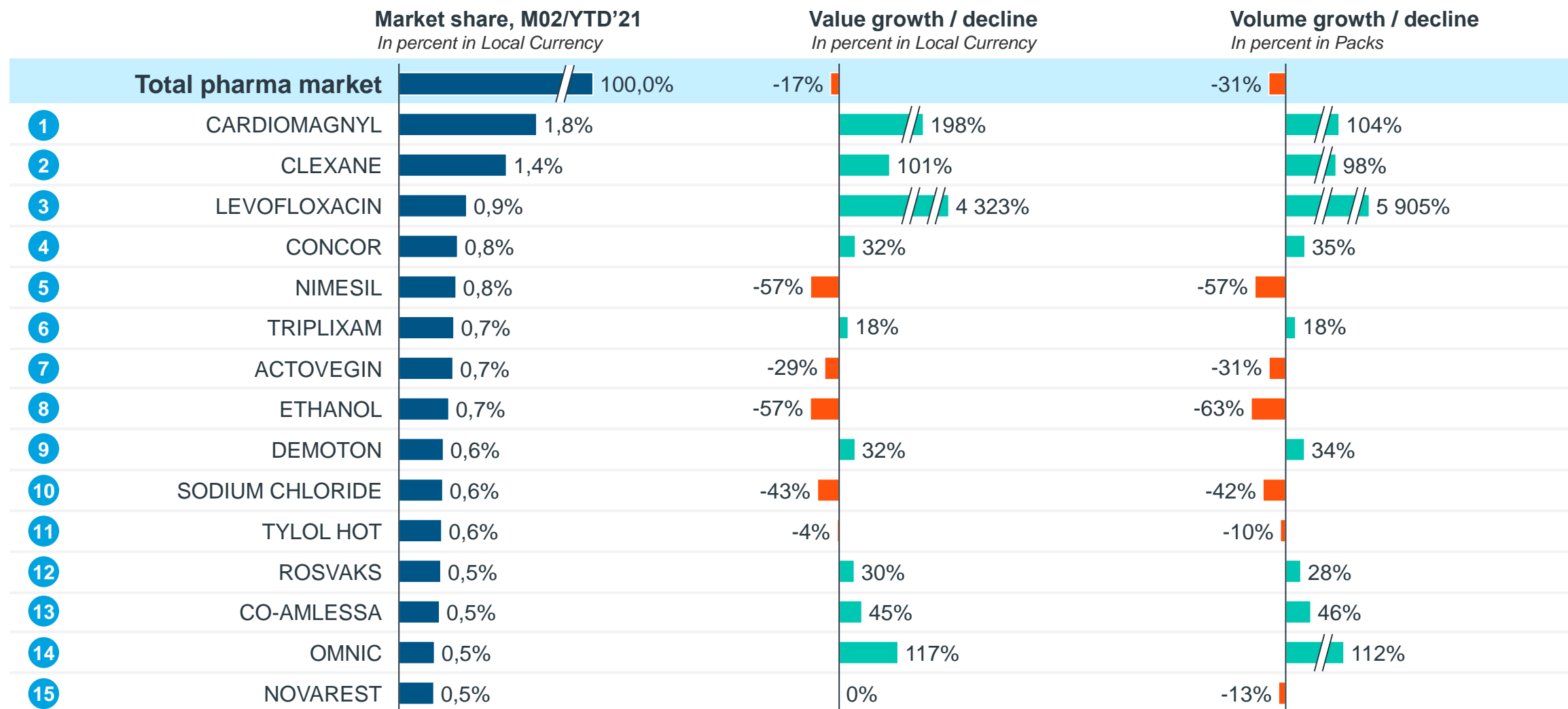


Indicator	AZN	USD	EUR	PACKS
Value M02/YTD'21, Bln.	0,11	0,07	0,05	0,03
Growth M02/YTD'21, %	▼ -17%	▼ -17%	▼ -25%	▼ -31%

TOP-15 corporations on Azerbaijan market, January-February 2021



TOP-15 brands on Azerbaijan market, January-February 2021



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