

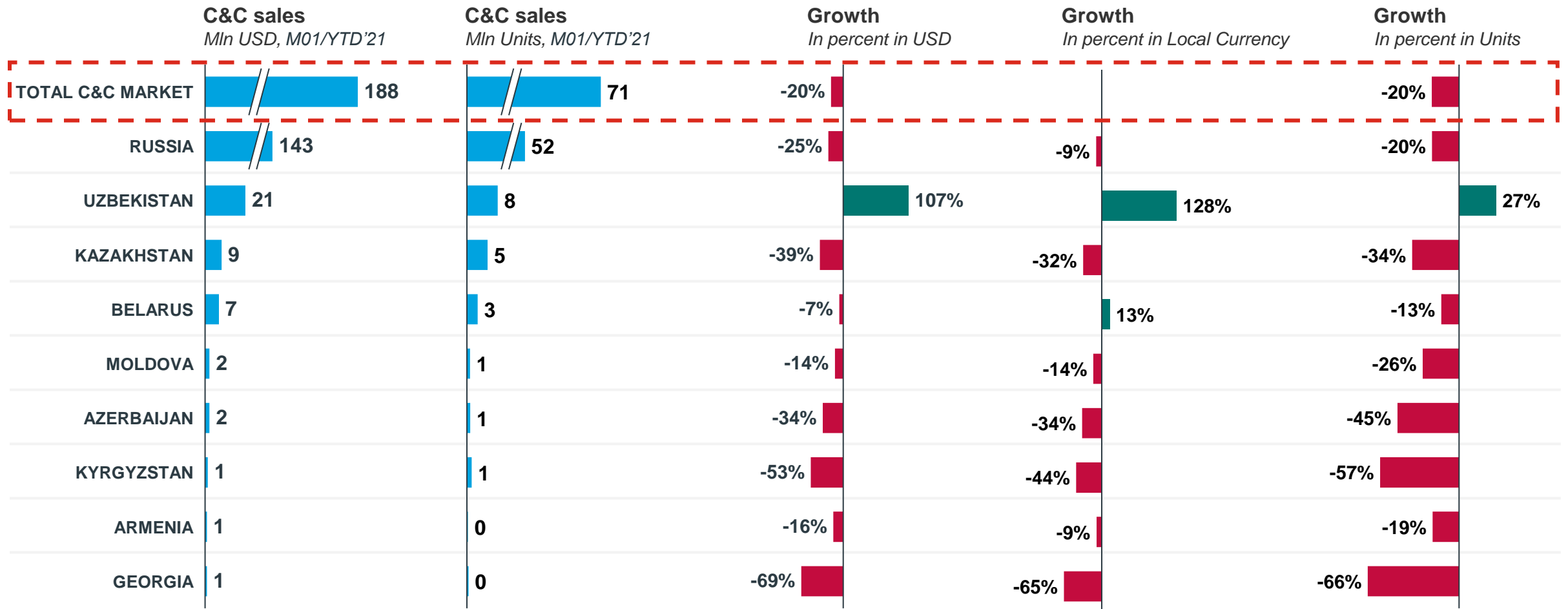


# Facts from IQVIA

M01 2021

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

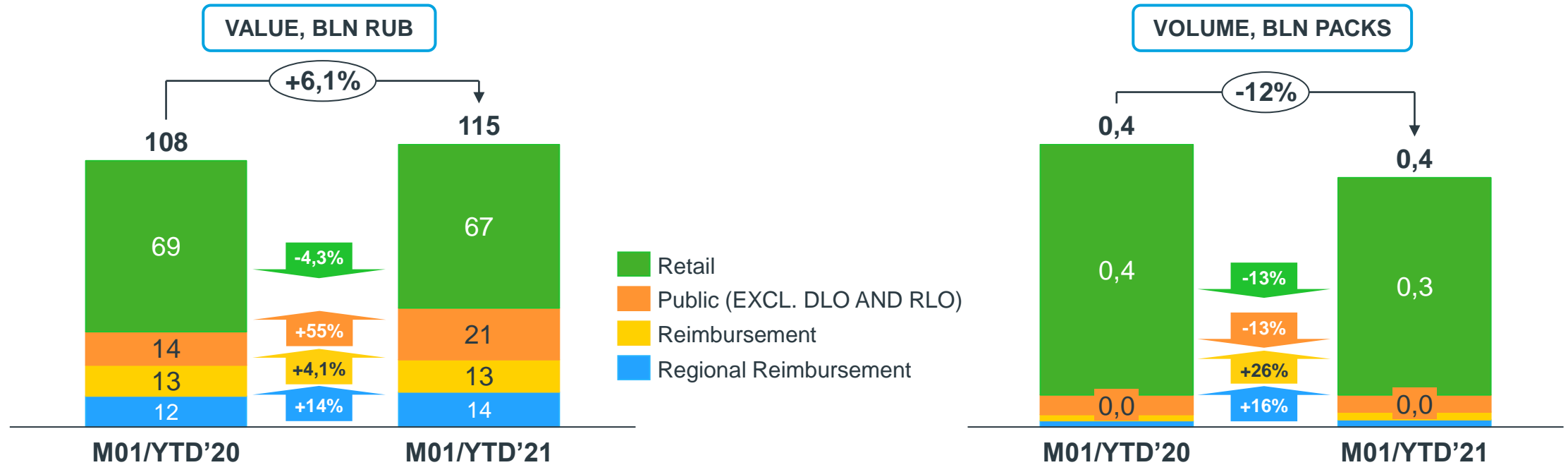
C&C decreased by 20% in USD and by 20% in volume





# Russian pharma market growth in January 2021

Market grew by 6,1% in value and decreased by 12% in volume

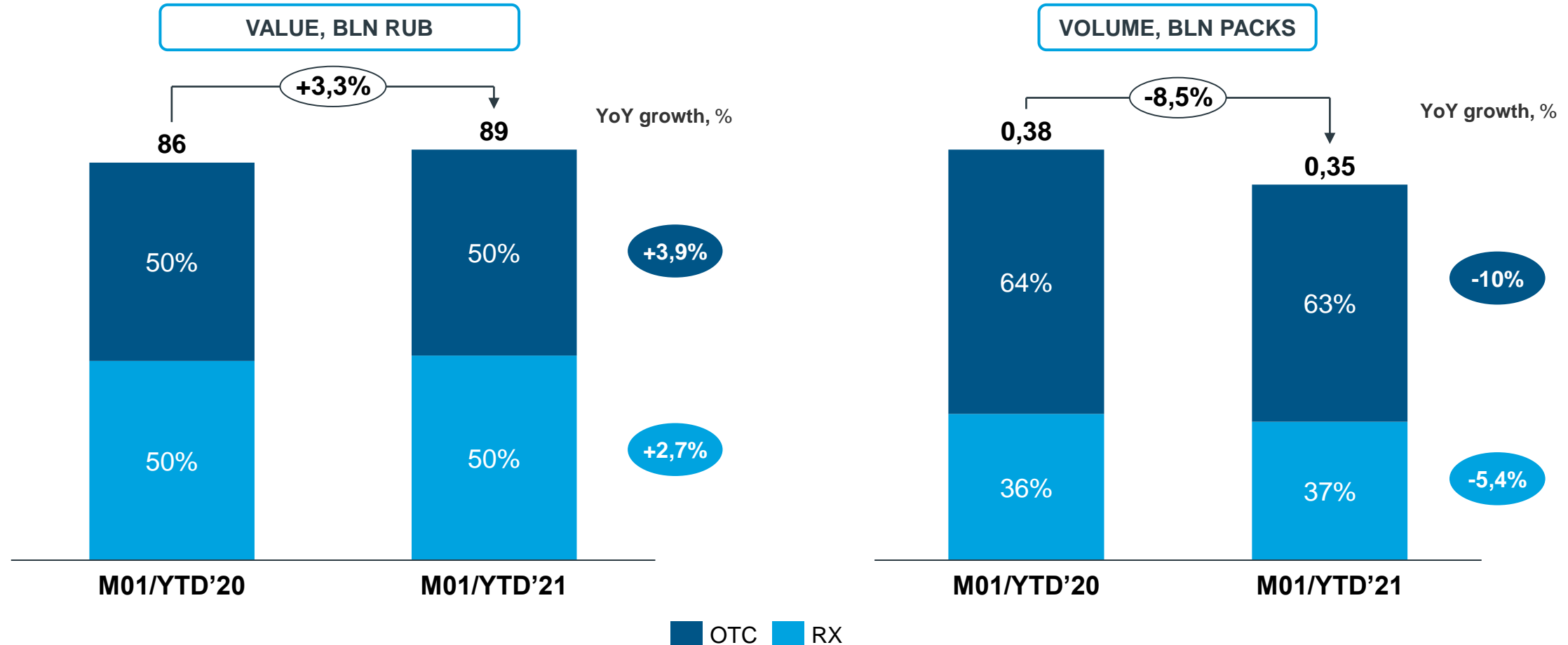


Indicator	RUB	USD	EUR	PACKS
Value M01/YTD'21, Bln.	115	1,5	1,3	0,4
Growth M01/YTD'21%	▲ 6,1%	▼ -12%	▼ -19%	▼ -12%



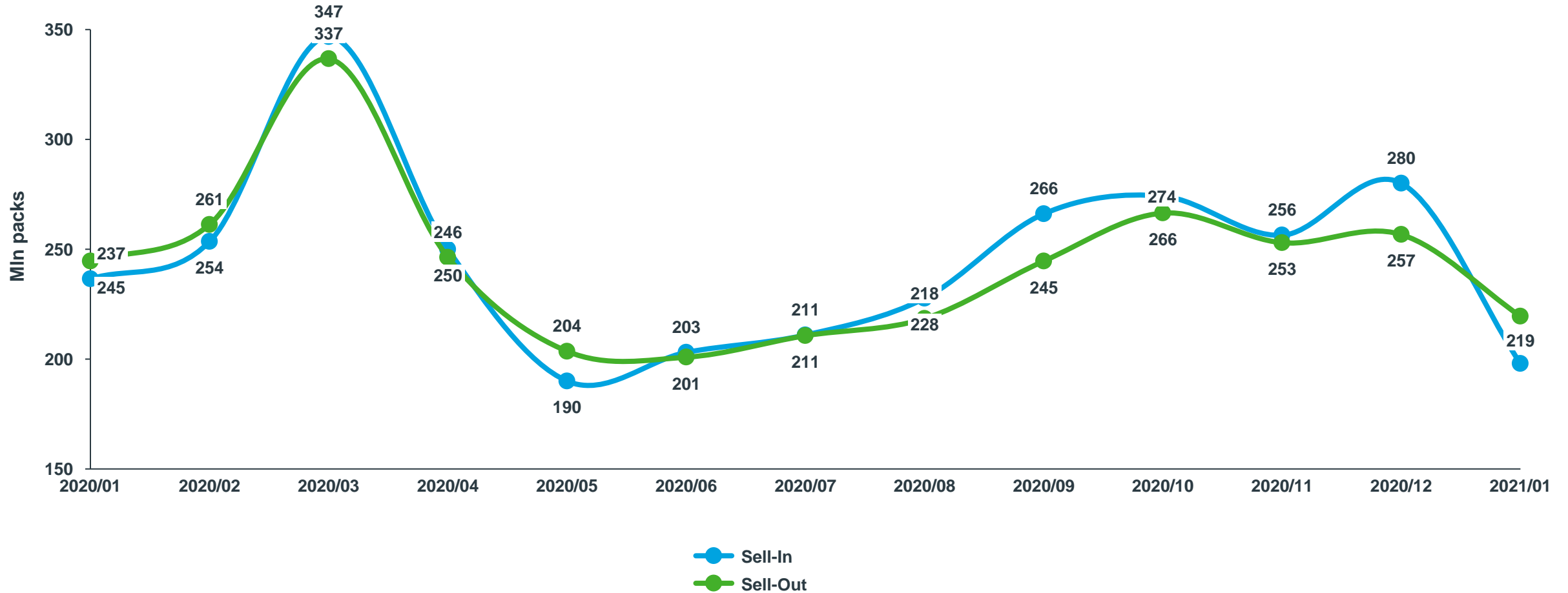
# Russian pharma market growth in January 2021

*Retail Sell-Out: Market grew by 3,3% in value and decreased by 8,5% in volume*



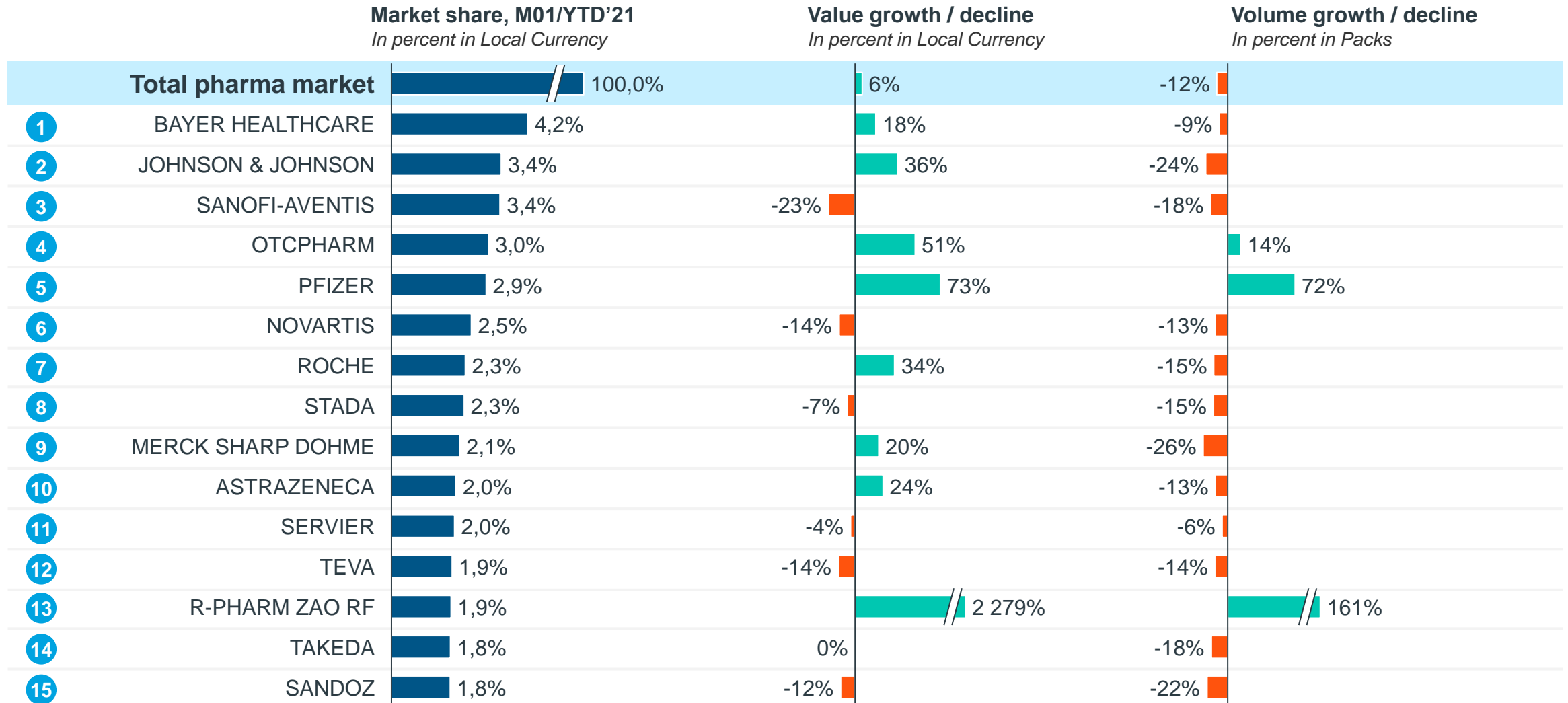


# Sell-In vs Sell-Out, OTC registered drugs





# TOP-15 corporations on Russian market, January 2021



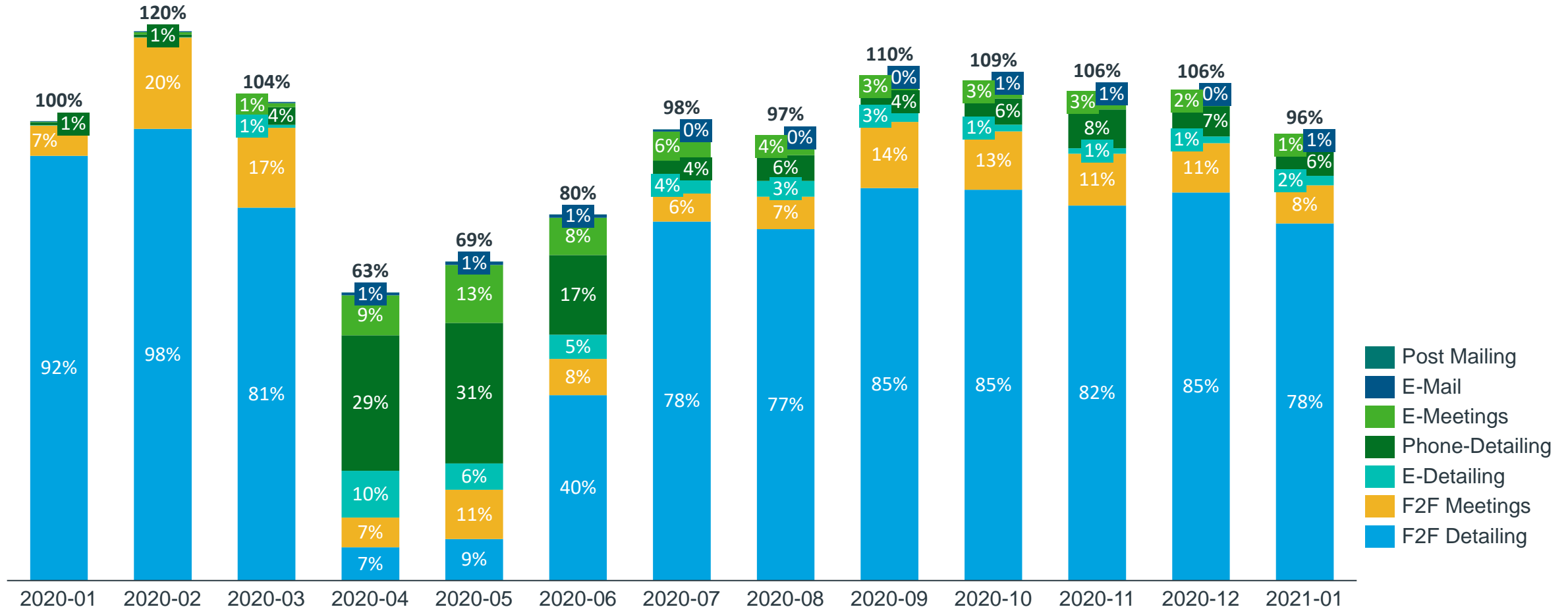
Source: IQVIA databases. Retail, Public, DLO, RLO (excluding food supplements and diagnostic agents), TRD Prices



# TOP-15 brands on Russian market, January 2021

		Market share, M01/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>
<b>Total pharma market</b>		100,0%	6%	-12%
1	XARELTO	1,7%	90%	63%
2	ARBIDOL	1,2%	476%	349%
3	KEYTRUDA	1,1%	89%	90%
4	ELIQUIS	0,9%	123%	121%
5	OPDIVO	0,9%	109%	115%
6	ARTLEGIA	0,9%		
7	CORONAVIR	0,8%		
8	ADVAGRAF	0,8%	42%	53%
9	REVLIMIDE	0,7%	117%	216%
10	SPINRAZA	0,7%	1 913%	2 220%
11	ELIZARIA	0,7%	-19%	-19%
12	PREVENAR 13	0,6%	1 015%	1 061%
13	HEMATE P	0,6%	7%	8%
14	AREPLIVIR	0,5%		
15	TOUJEO SOLOSTAR	0,5%	-35%	-31%

# Index of promotional interactions by channels in Russia, January 2020-January 2021

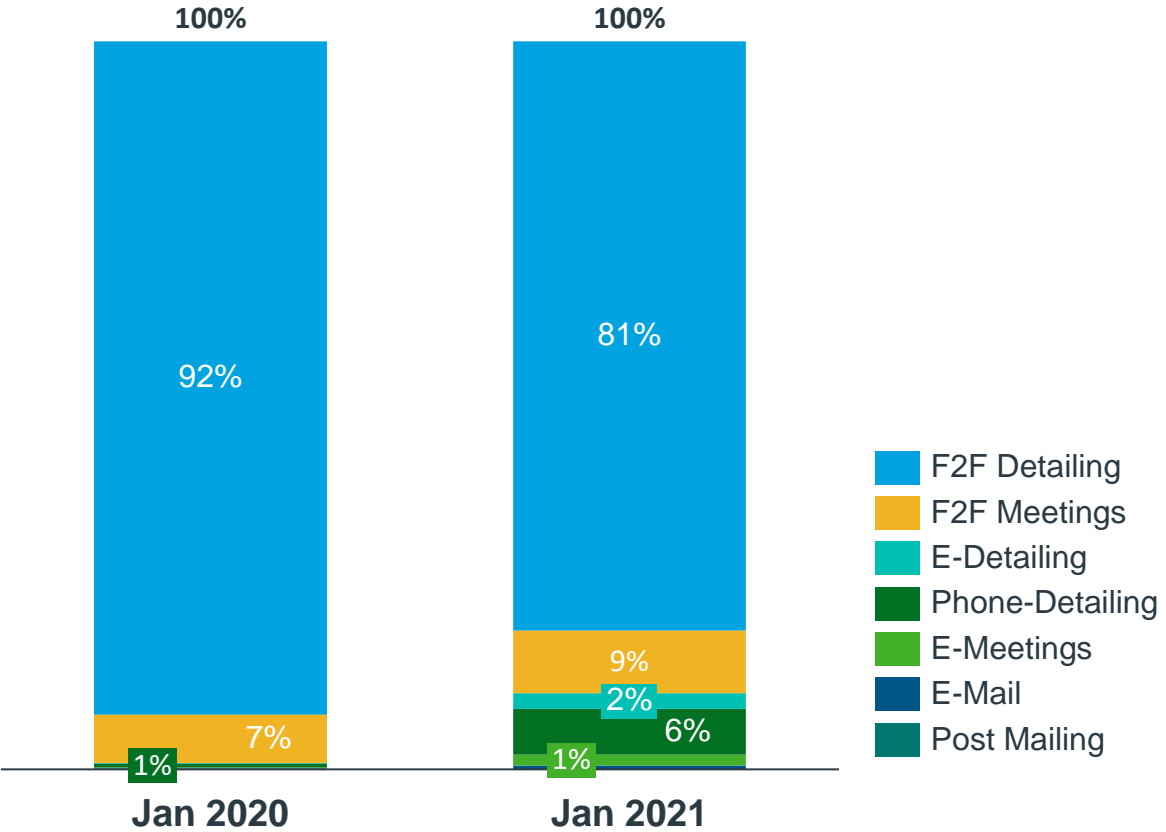


Source: IQVIA Russia, Channel Dynamics promo evaluation

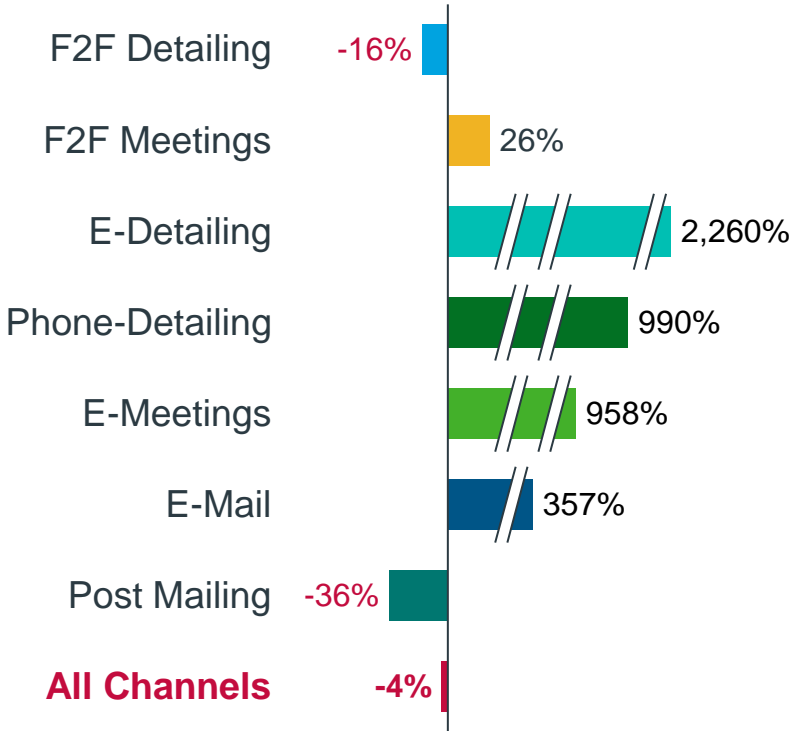


# Total Market overall promotional volume declined by 4%, January 2021 vs 2020

Promotional volume share by channel

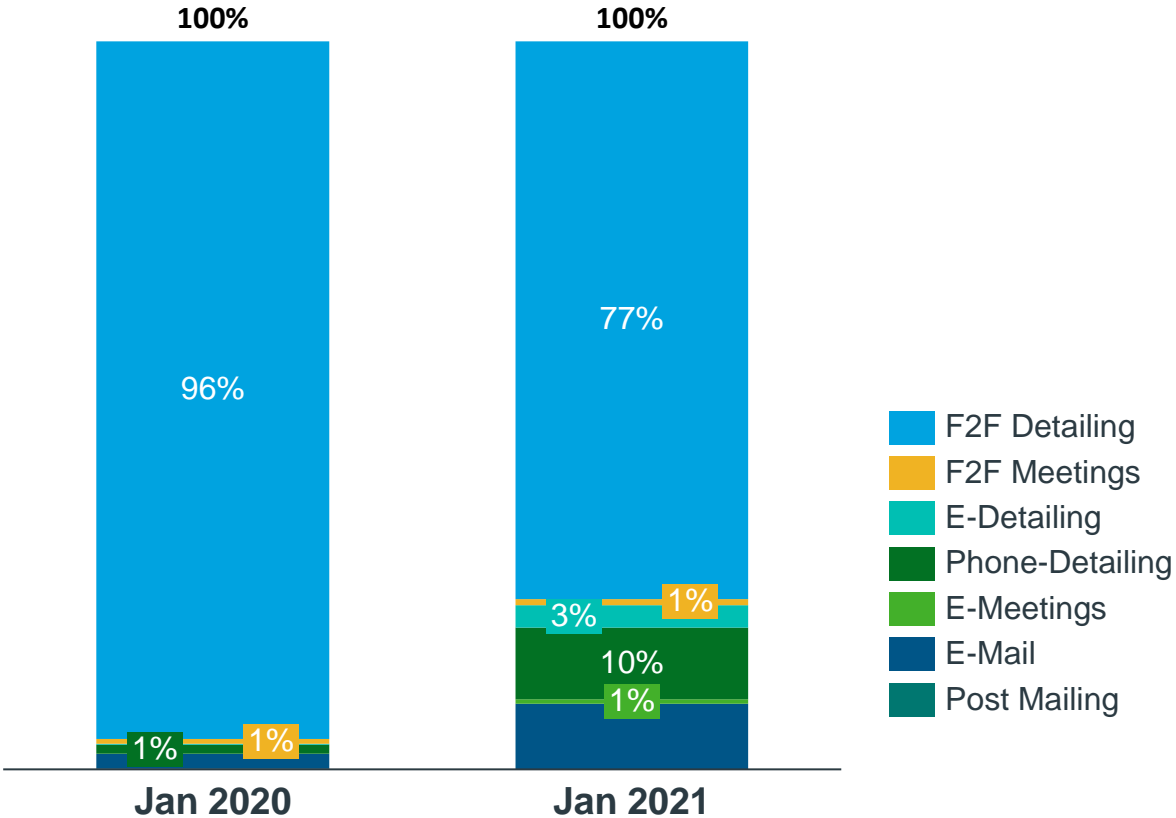


% Changes in promotional volume by channel  
Jan 2021 vs 2020

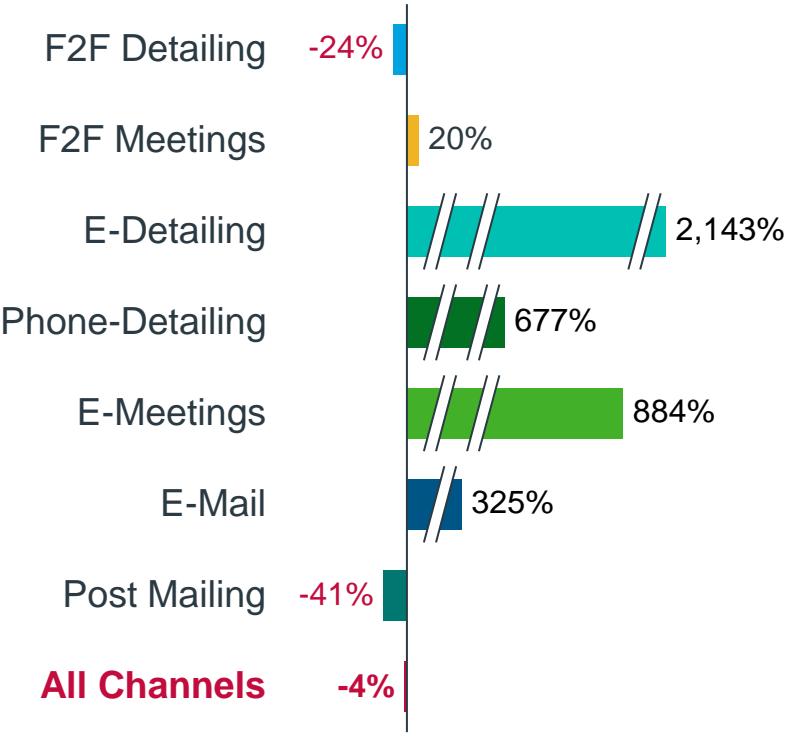


# Total Market overall promotional volume (contacts) declined by 4%, January 2021 vs 2020

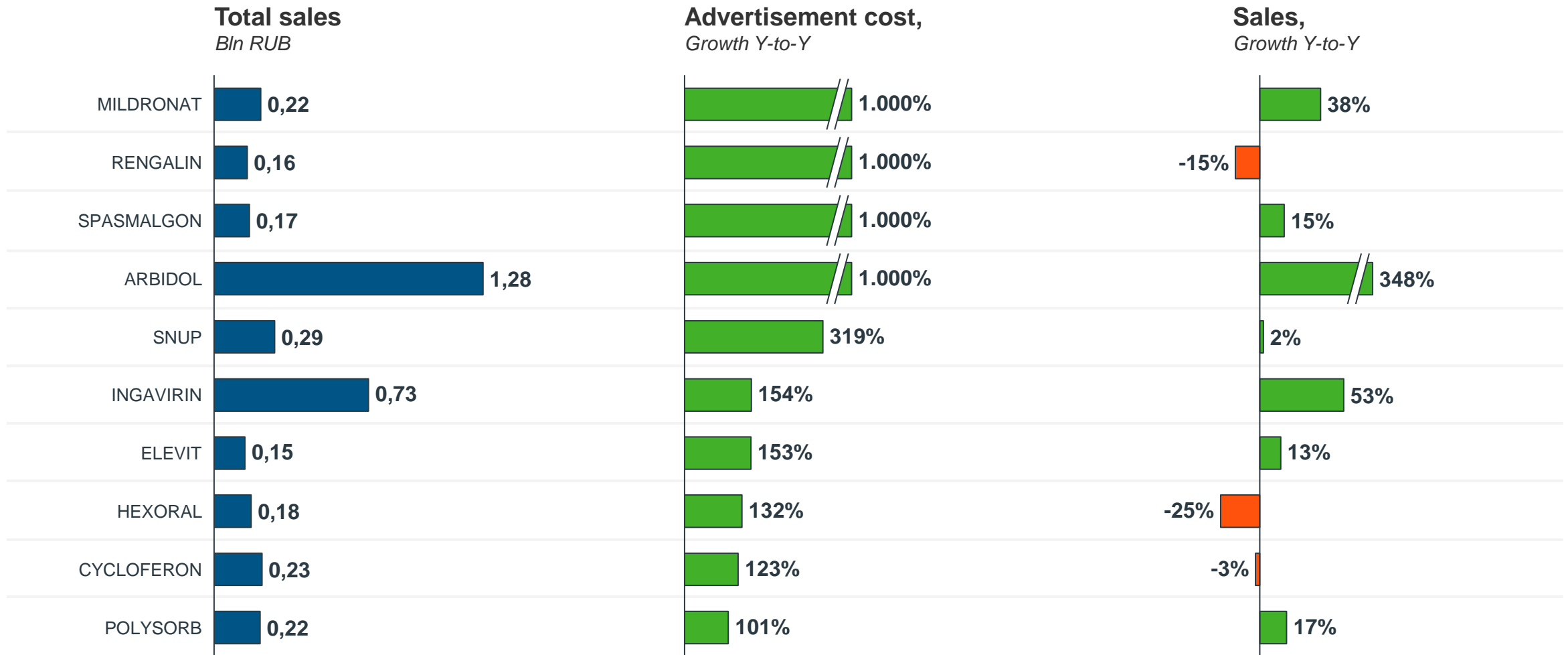
Promotional volume (contacts) share by channel



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

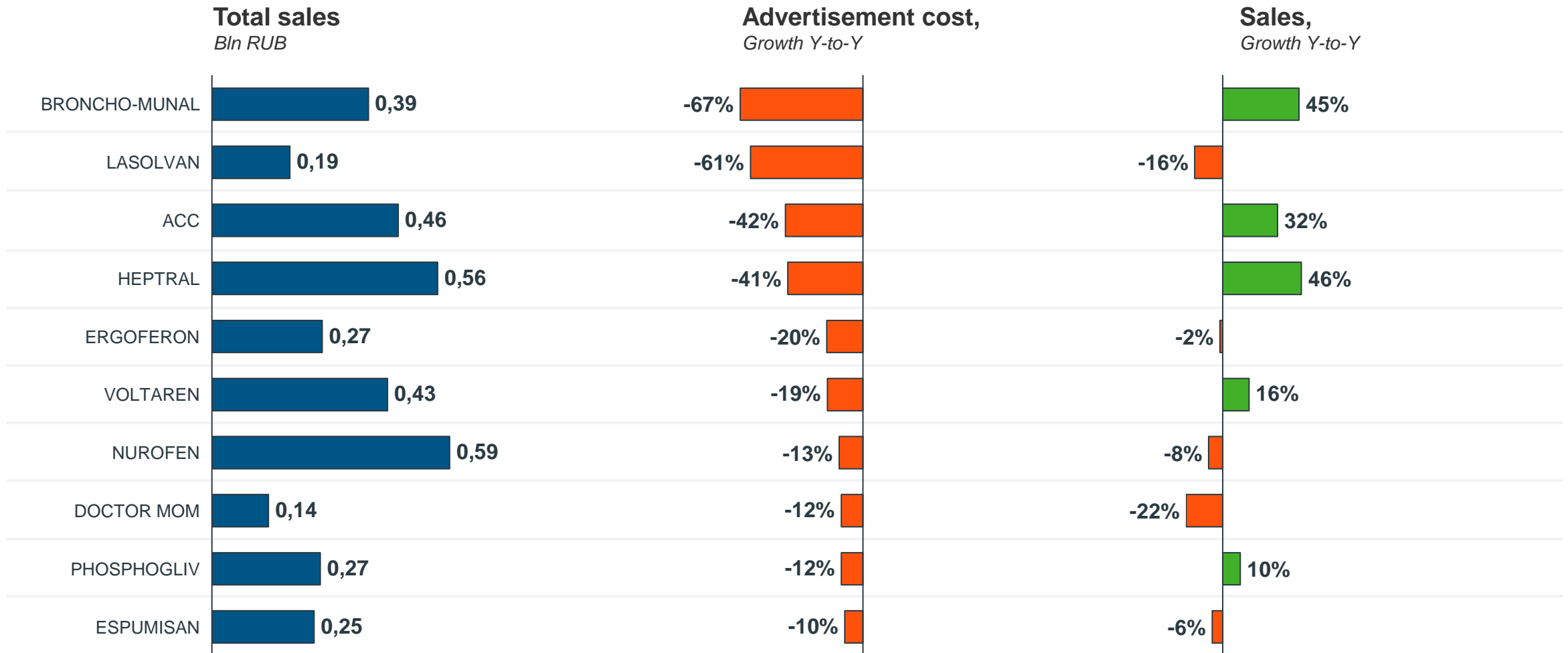


# TOP-10 products by growth in advertisement investments in January 2021



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 2021

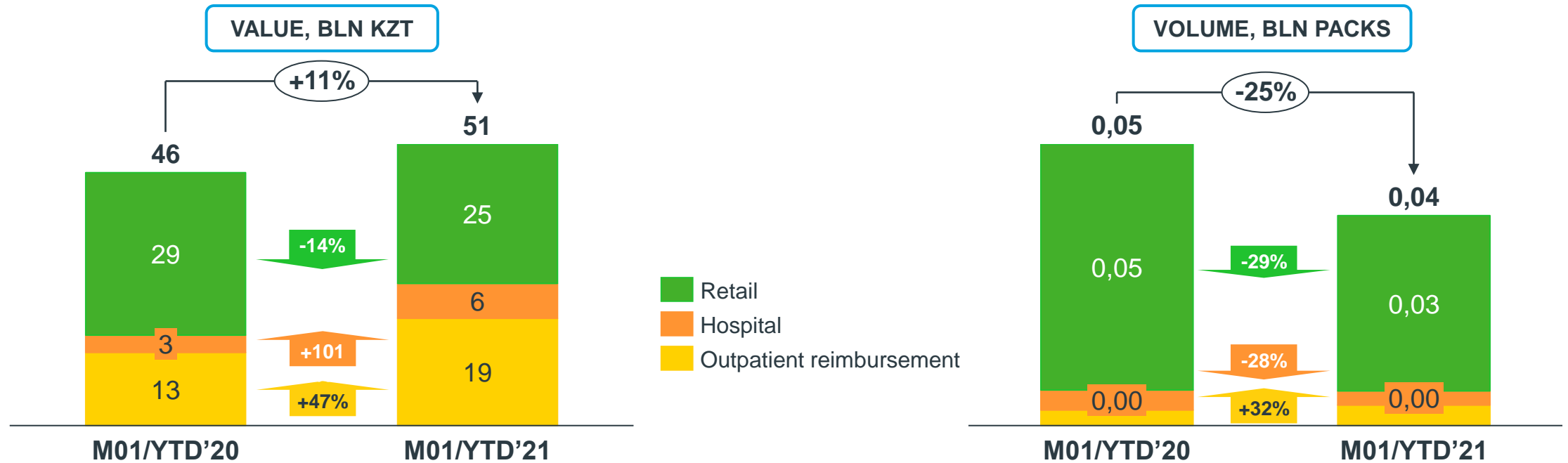


The rank is calculated among TOP-200 Brands by sales with advertising cost greater than 50 mln RUB  
Source: IQVIA databases, Pharmatrend, Mediascope data, FIN Prices



# Kazakhstan pharma market growth in January 2021

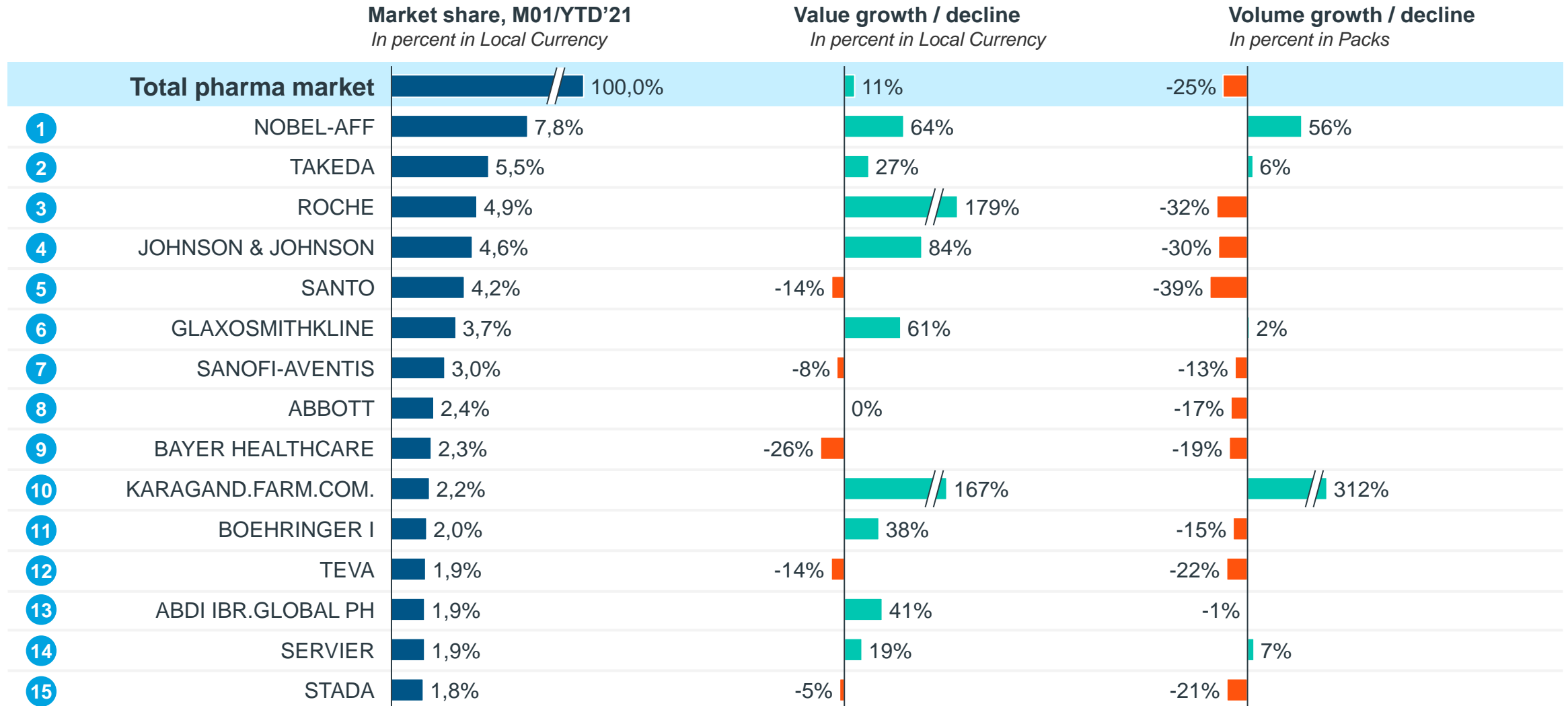
Market grew by 11% in value and decreased by 25% in volume



Indicator	KZT	USD	EUR	PACKS
Value M01/YTD'21, Bln.	51	0,12	0,10	0,04
Growth M01/YTD'21%	▲ 11%	▲ 0,3%	▼ -8,6%	▼ -25%

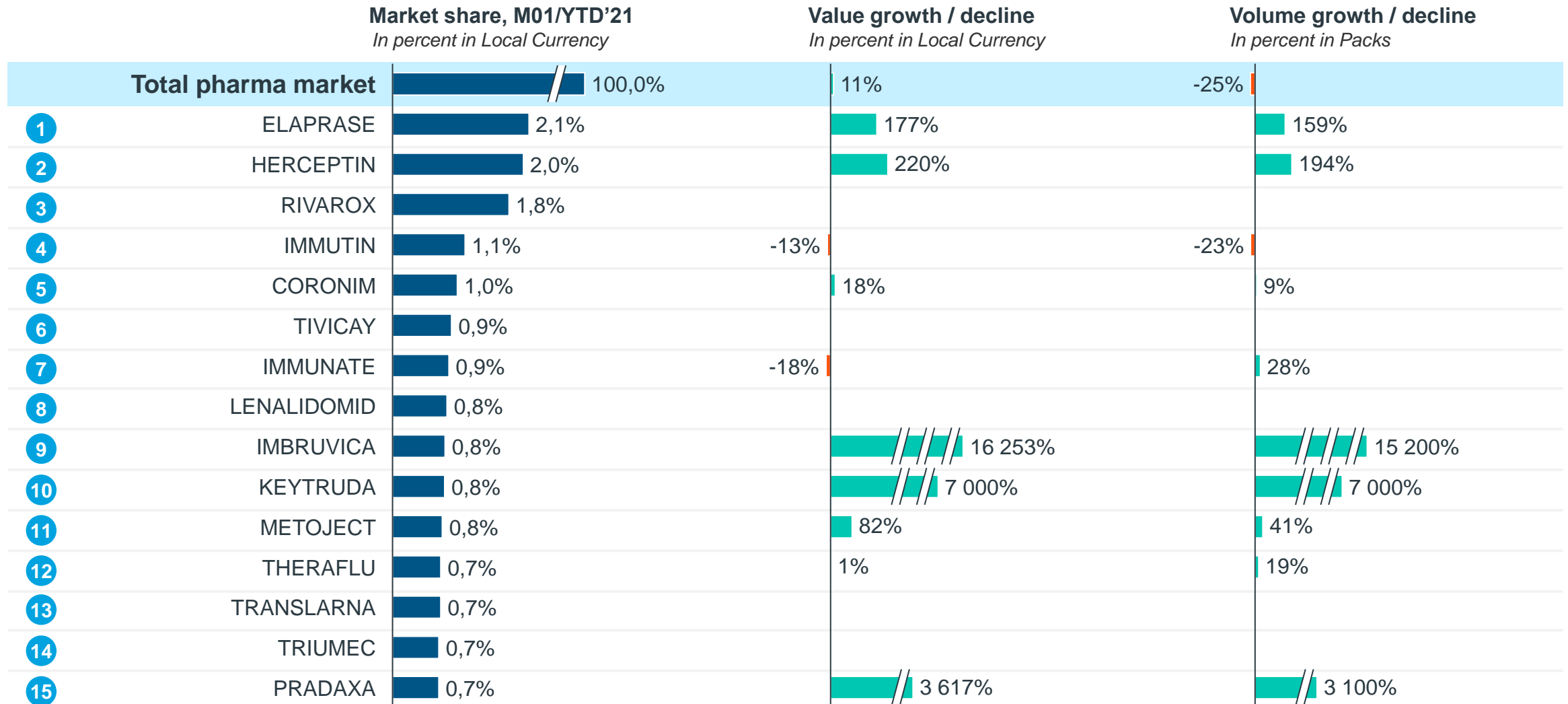


# TOP-15 corporations on Kazakhstan market, January 2021





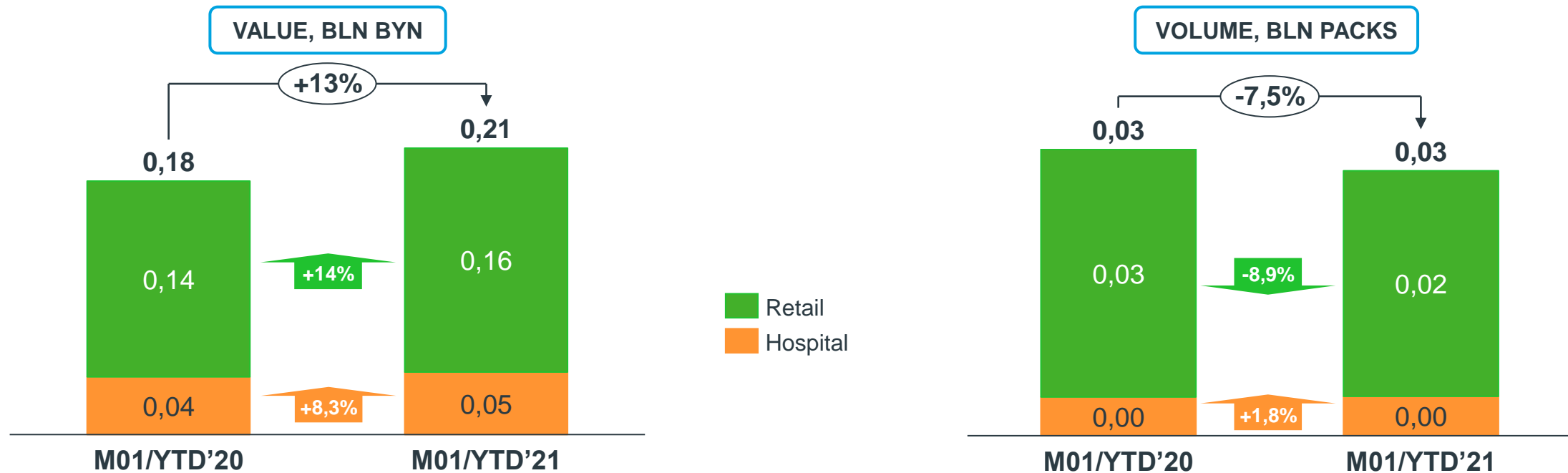
# TOP-15 brands on Kazakhstan market, January 2021





# Belarus pharma market growth in January 2021

Market grew by 13% in value and decreased by 7,5% in volume

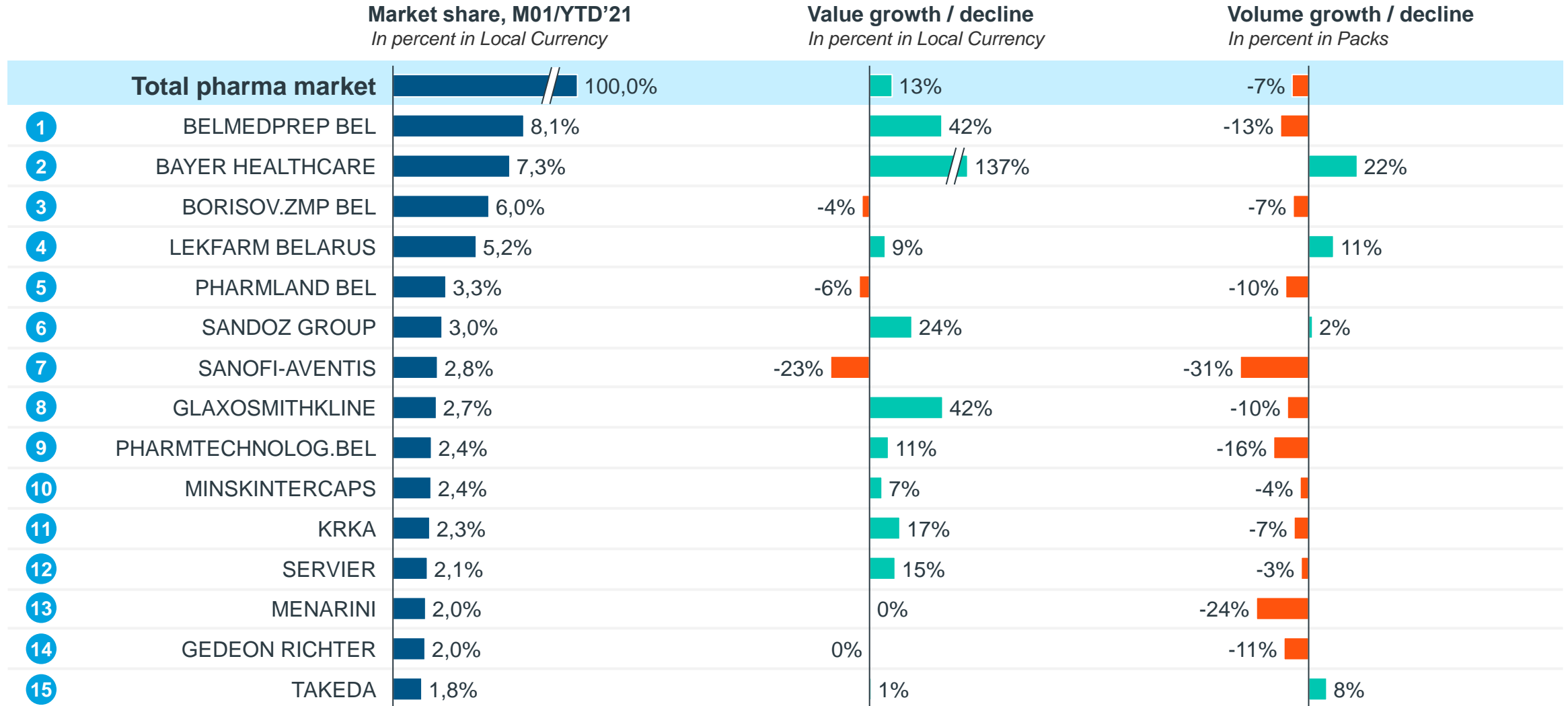


Indicator	BYN	USD	EUR	PACKS
Value M01/YTD'21, Bln.	0,21	0,08	0,07	0,03
Growth M01/YTD'21%	▲ 13%	▼ -6,9%	▼ -15,2%	▼ -7,5%





# TOP-15 corporations on Belarus market, January 2021



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



# TOP-15 brands on Belarus market, January 2021

		Market share, M01/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>
<b>Total pharma market</b>		100,0%	13%	-7%
1	XARELTO	5,0%	316%	172%
2	SIRTURO	1,4%	447%	550%
3	HEPARIN-BELMED	1,1%	1 134%	490%
4	PRIORIX	1,0%	8 701%	8 786%
5	ADVAGRAF	1,0%	-59%	-28%
6	ACTEMRA	0,9%	2 268%	1 004%
7	NATRIUM CHLORIDUM	0,8%	15%	0%
8	ENOXAPARIN S.K.	0,8%		
9	CEREPRO	0,7%	6%	-11%
10	CARDIOMAGNYL	0,7%	170%	100%
11	ACC	0,7%	144%	80%
12	FRAXIPARINE	0,6%	151%	59%
13	RIVAXAN	0,6%		
14	AMLESSA	0,6%	74%	39%
15	FRAGMIN	0,5%	259%	194%



# Uzbekistan pharma market growth in January 2021

Market grew by 125% in value and by 48% in volume



Indicator	UZS	USD	EUR	PACKS
Value M01/YTD'21, Bln.	1 485	0,14	0,12	0,08
Growth M01/YTD'21%	▲ 125%	▲ 105%	▲ 88%	▲ 48%

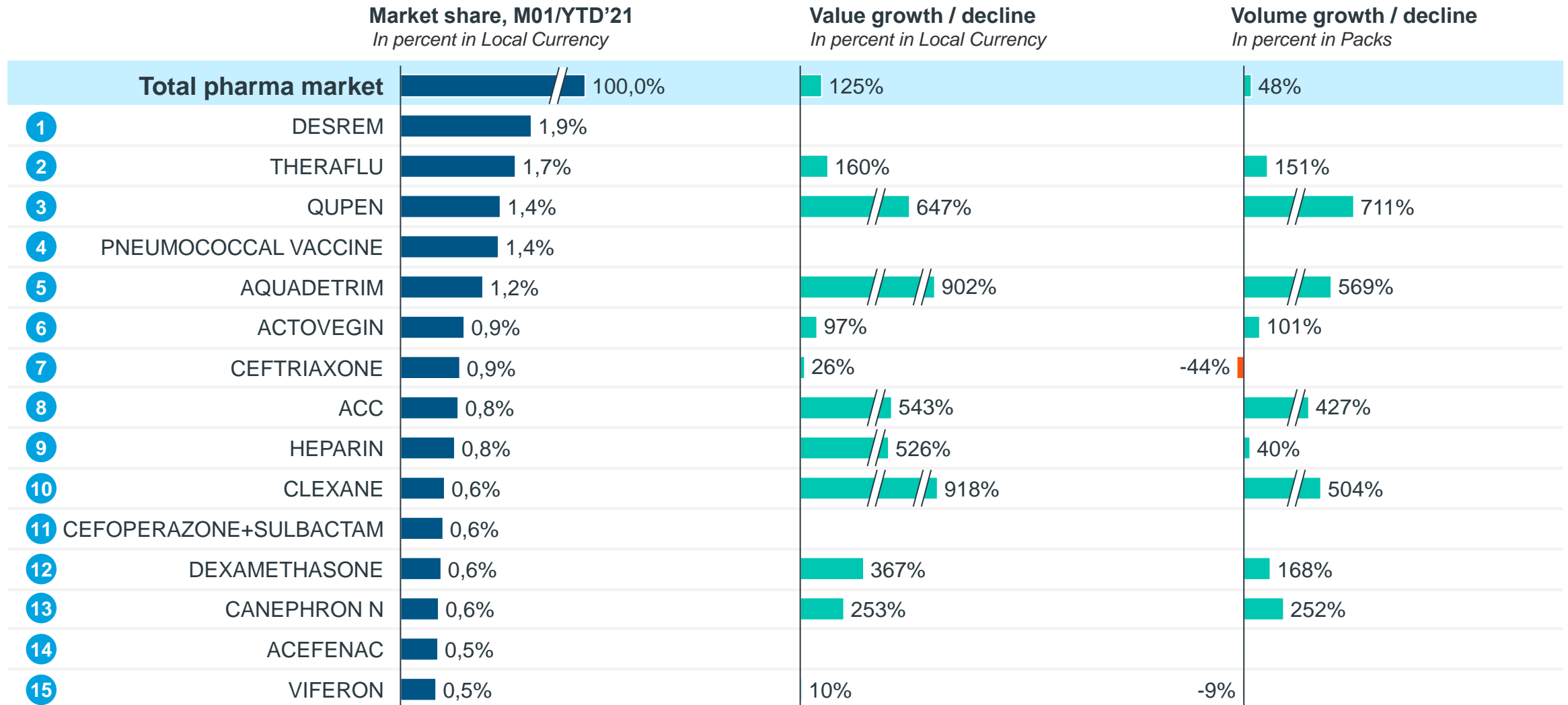


# TOP-15 corporations on Uzbekistan market, January 2021

		Market share, M01/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>
<b>Total pharma market</b>		100,0%	125%	48%
1	KRKA	3,5%	155%	149%
2	POLPHARMA SA	2,6%	384%	306%
3	SANOFI-AVENTIS	2,5%	129%	63%
4	AVISON PHARMACEUTICALS	2,3%	441%	393%
5	NOVARTIS	2,3%	252%	154%
6	MYLAN LABORAT.IND	2,2%	5 041%	3 841%
7	FARMAK KIEV	2,1%	99%	81%
8	GLAXOSMITHKLINE	1,9%	143%	123%
9	MENARINI	1,9%	-22%	-29%
10	STADA	1,8%	46%	33%
11	AVANTIKA MEDEX.	1,7%	190%	91%
12	BKRS PHARMA PVT	1,7%	596%	395%
13	WORLD MEDICINE	1,6%	250%	200%
14	GM PHARMACEUTICALS	1,4%	12%	-2%
15	SERUM INSTIT.IND	1,4%	790%	41%



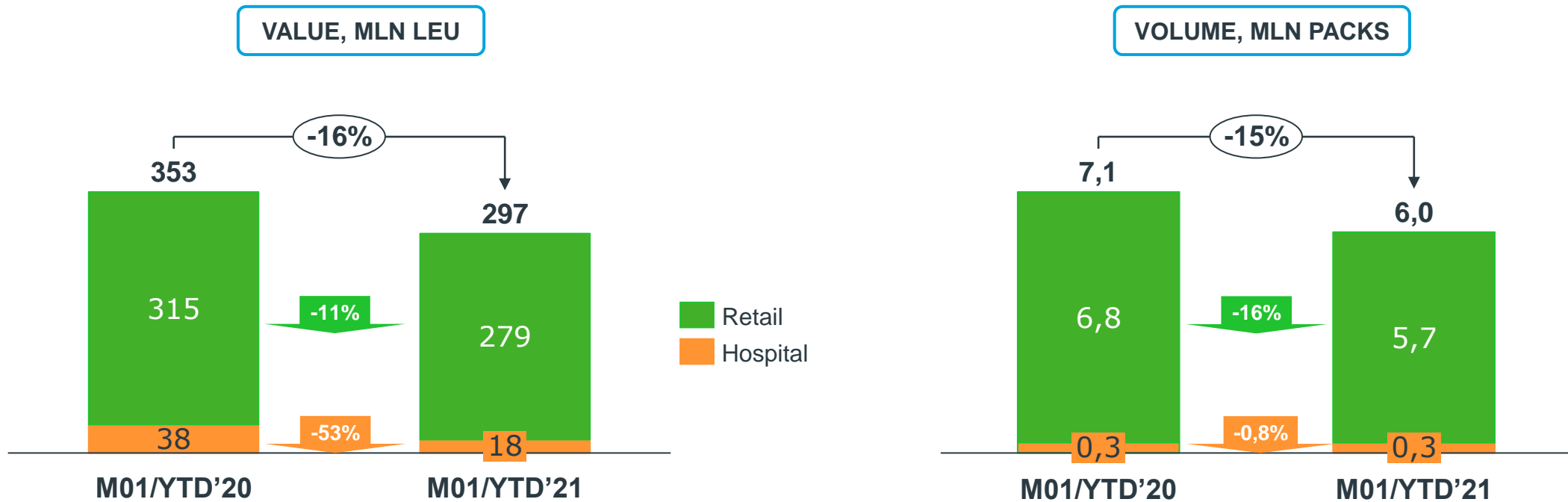
# TOP-15 brands on Uzbekistan market, January 2021





# Moldova pharma market growth in January 2021

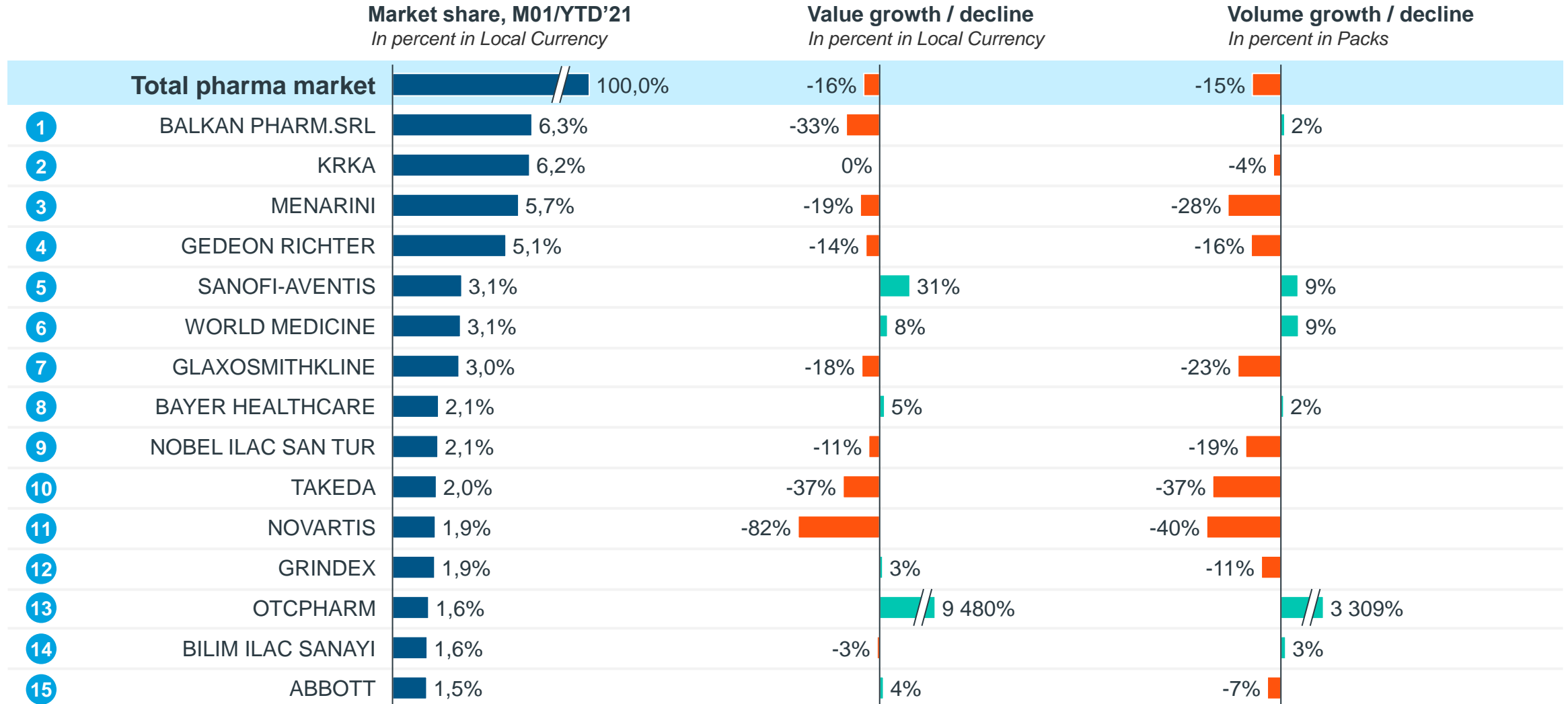
Market decreased by 16% in value and by 15% in volume



Indicator	LEU	USD	EUR	PACKS
Value M01/YTD'21, Mln.	297	17,2	14,1	6,0
Growth M01/YTD'21%	▼ -16%	▼ -15%	▼ -23%	▼ -15%

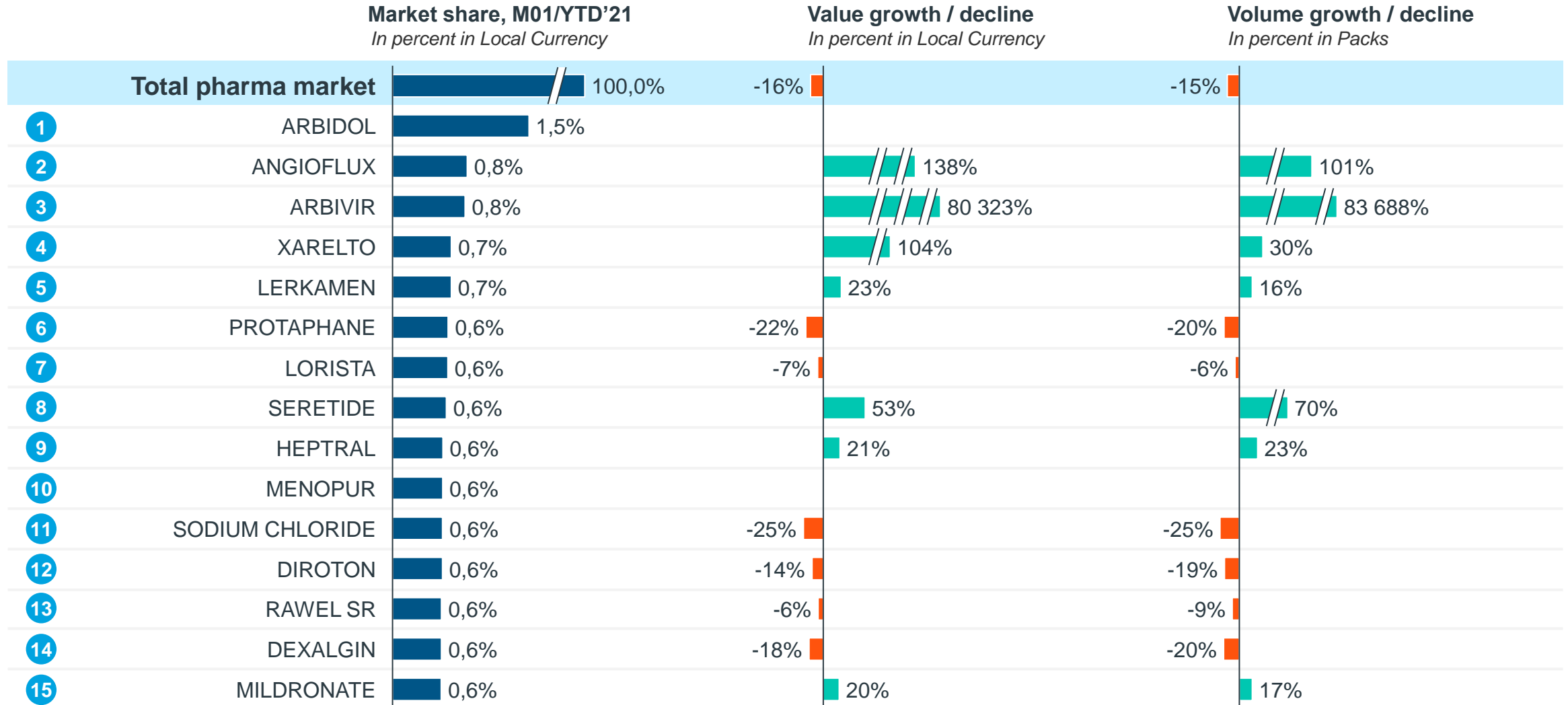


# TOP-15 corporations on Moldova market, January 2021





# TOP-15 brands on Moldova market, January 2021





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