



*Business-Credit*

## ***Summary of Ukrainian Retail Pharmaceutical Market Development in 2012***

***Medicines***

## List of abbreviations used

### Money

- **SV** (sales volume)
- **GR SV** (growth rate of the sales volume)
- **Sh SV** (share of the sales volume)
- **GR Sh SV** (growth rate of share of sales volume)
- **EI SV** (evolutional index of sales volume)

### Trading units

- **TU** (quantity of trading units)
- **GR TU** (growth rate of quantity of sold trading units)
- **Sh TU** (share of trading units)
- **GR Sh TU** (growth rate of share of trading units)
- **EI\_TU** (evolutional index of sold trading units)

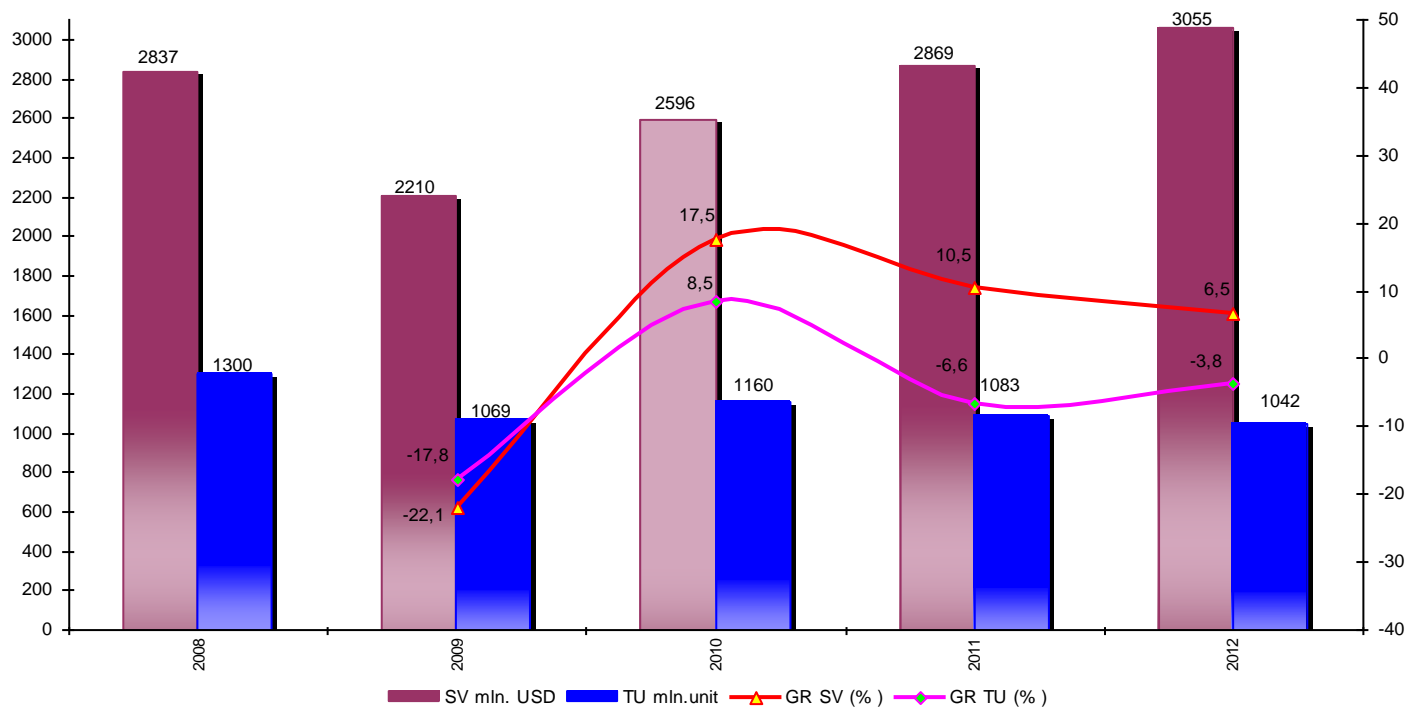
### Prices

- **Rtl Pr** (retail price)
- **GR Rtl Pr** (growth rate of retail price)
- **Rtl Pr W** (the average retail price weighted on trading units)
- **GR Rtl Pr W** (growth rate of the average retail price, weighted on trading units)
- **Rtl Pr / Whs Pr** (ratio of the retail and wholesale prices)

**xxx** - max    **xxx** - min

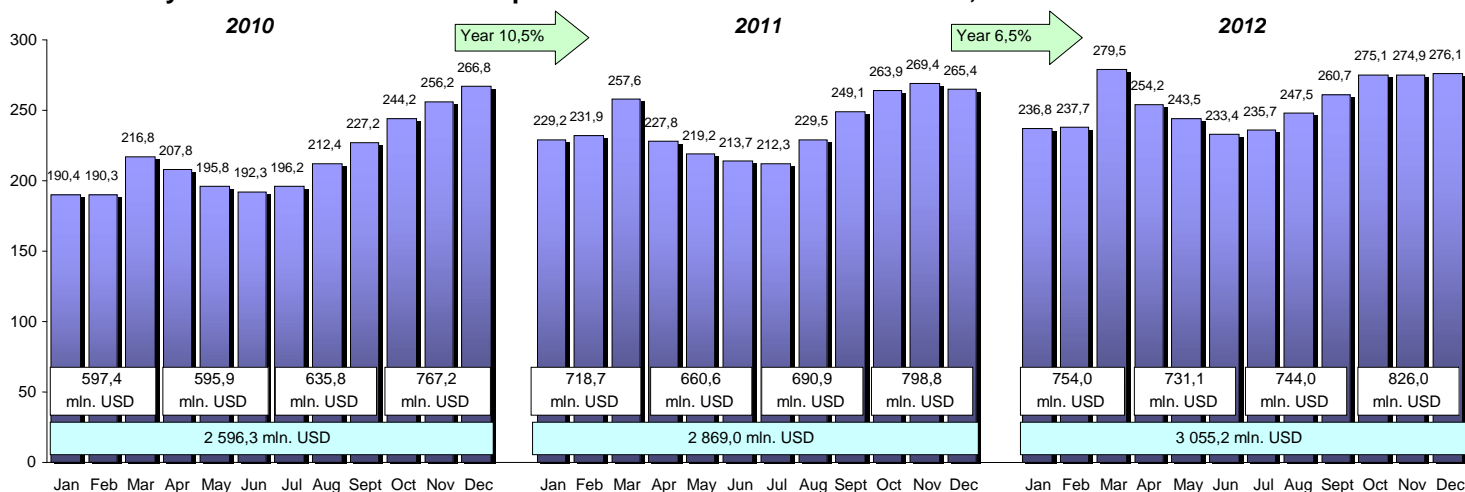
## I Ukrainian Indices

1.1. Ukrainian retail Pharmaceutical Market in 2001 – 2012, sales out (mln. USD), (mln. Units), growth (%)



## II. Ukrainian pharmaceutical retail market dynamics.

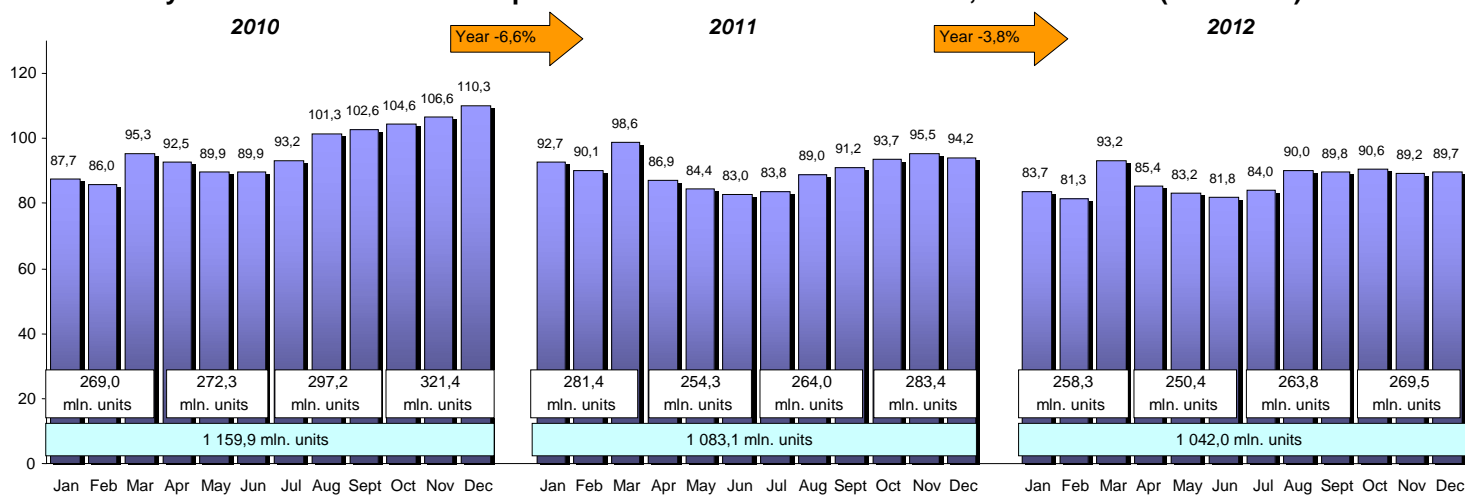
### 2.1. Dynamics of Ukrainian retail pharmaceutical market in 2010-2012, sales out mln. USD



Indicator	Jan	Feb	Mar	1Qtr	Apr	May	Jun	2Qtr	Jul	Aug	Sep	3Qtr	Oct	Nov	Dec	4Qtr	Year
GR 2012/2011 (%)	3,3	2,5	8,5	4,9	11,6	11,1	9,2	10,7	11,0	7,9	4,7	7,7	4,2	2,0	4,0	3,4	6,5
GR 2011/2010 (%)	20,4	21,9	18,9	20,3	9,6	11,9	11,1	10,9	8,2	8,0	9,6	8,7	8,1	5,2	-0,5	4,1	10,5
Share Rx /OTC 2012(%)	52,83	52,94	52,75	52,83	54,04	55,66	55,53	55,05	56,02	54,84	51,59	54,07	53,24	53,94	52,36	53,18	53,76
Share Foreign /Domestic 2012 (%)	26,21	26,18	25,80	26,05	25,87	26,13	26,67	26,22	26,96	27,11	26,17	26,74	25,97	25,71	25,69	25,79	26,18

(GR – Growth rate)

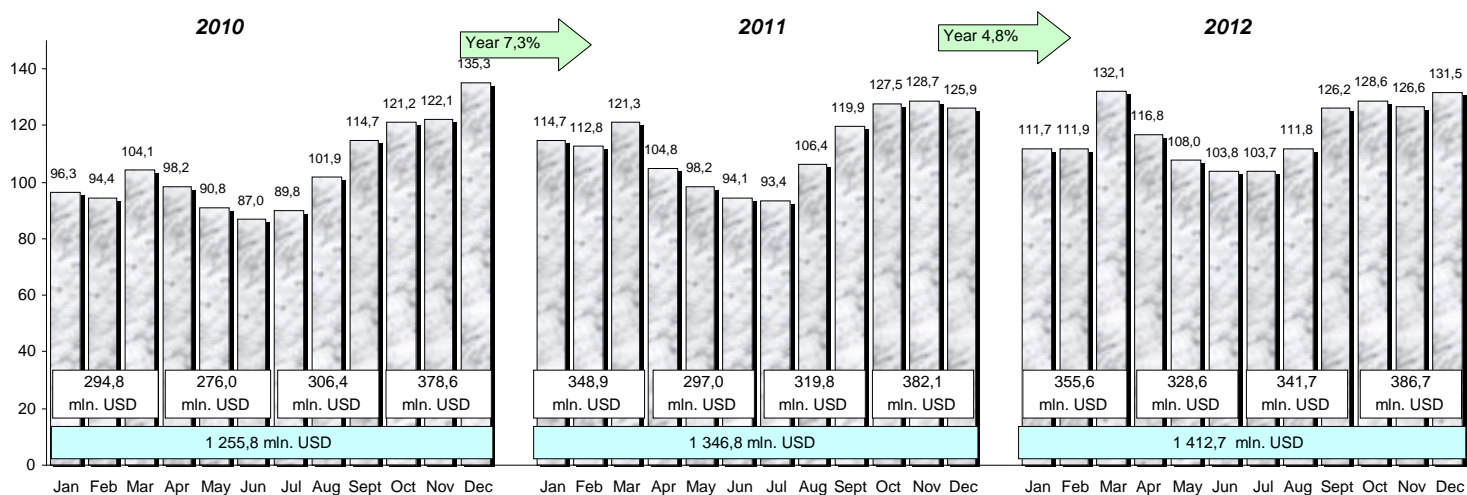
### 2.2. Dynamics of Ukrainian retail pharmaceutical market in 2010-2012, sales volume (mln. units)



Indicator	Jan	Feb	Mar	1Qtr	Apr	May	Jun	2Qtr	Jul	Aug	Sep	3Qtr	Oct	Nov	Dec	4Qtr	Year
GR 2012/2011 (%)	-9,7	-9,8	-5,5	-8,2	-1,8	-1,4	-1,4	-1,5	0,2	1,1	-1,5	-0,1	-3,4	-6,6	-4,7	-4,9	-3,8
GR 2011/2010 (%)	5,7	4,8	3,5	-9,2	-6,1	-6,1	-7,7	4,6	-10,0	-12,2	-11,2	-11,2	-10,4	-10,4	-14,6	-11,8	-6,6
Share Rx /OTC 2012(%)	32,37	32,50	32,59	32,49	32,83	33,30	32,72	32,95	32,32	31,36	30,92	31,52	32,56	32,88	31,75	32,39	32,33
Share Foreign /Domestic 2012 (%)	62,17	61,77	61,13	61,67	61,95	62,99	63,91	62,94	64,86	64,82	61,03	63,54	60,40	60,34	60,17	60,30	62,28

(GR – Growth rate)

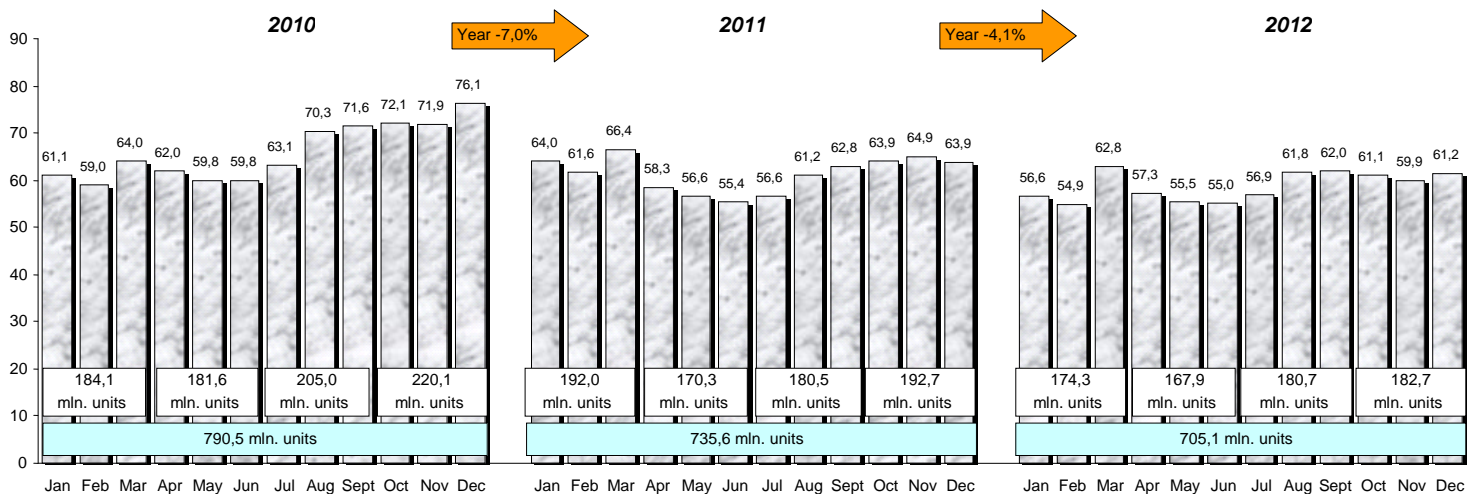
**2.3. Dynamics of Ukrainian OTC pharmaceutical market in 2010-2012, sales out mln. USD**



Indicator	Jan	Feb	Mar	1Qtr	Apr	May	Jun	2Qtr	Jul	Aug	Sep	3Qtr	Oct	Nov	Dec	4Qtr	Year
GR 2012/2011 (%)	-2,6	-0,8	8,8	1,9	11,5	9,9	10,3	10,6	11,0	5,0	5,3	6,9	0,9	-1,6	4,4	1,2	4,8
GR 2011/2010 (%)	19,2	19,5	16,6	18,3	6,8	8,2	8,2	7,7	4,0	4,5	4,5	4,4	5,2	5,4	-6,9	0,9	7,3

(GR – Growth rate)

**2.4. Dynamics of Ukrainian OTC pharmaceutical market in 2010-2012, sales volume (mln. units)**

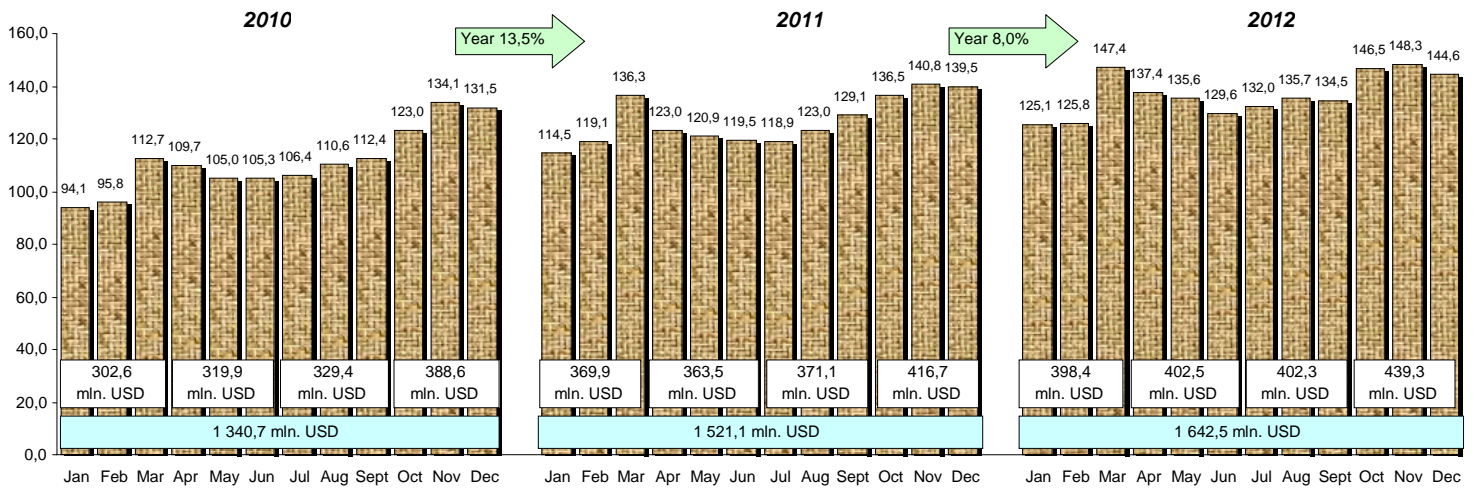


Indicator	Jan	Feb	Mar	1Qtr	Apr	May	Jun	2Qtr	Jul	Aug	Sep	3Qtr	Oct	Nov	Dec	4Qtr	Year
GR 2012/2011 (%)	-11,5	-10,9	-5,3	-9,2	-1,7	-1,9	-0,6	-1,4	0,5	1,0	-1,2	0,1	-4,5	-7,8	-4,1	-5,5	-4,1
GR 2011/2010 (%)	4,8	4,4	3,7	4,3	-6,0	-5,3	-7,5	-6,2	-10,4	-13,0	-12,2	-11,9	-11,3	-9,8	-16,1	-12,4	-7,0

(GR – Growth rate)

**2.5. Dynamics of Ukrainian RX pharmaceutical market in 2010-2012, sales out mln. USD**

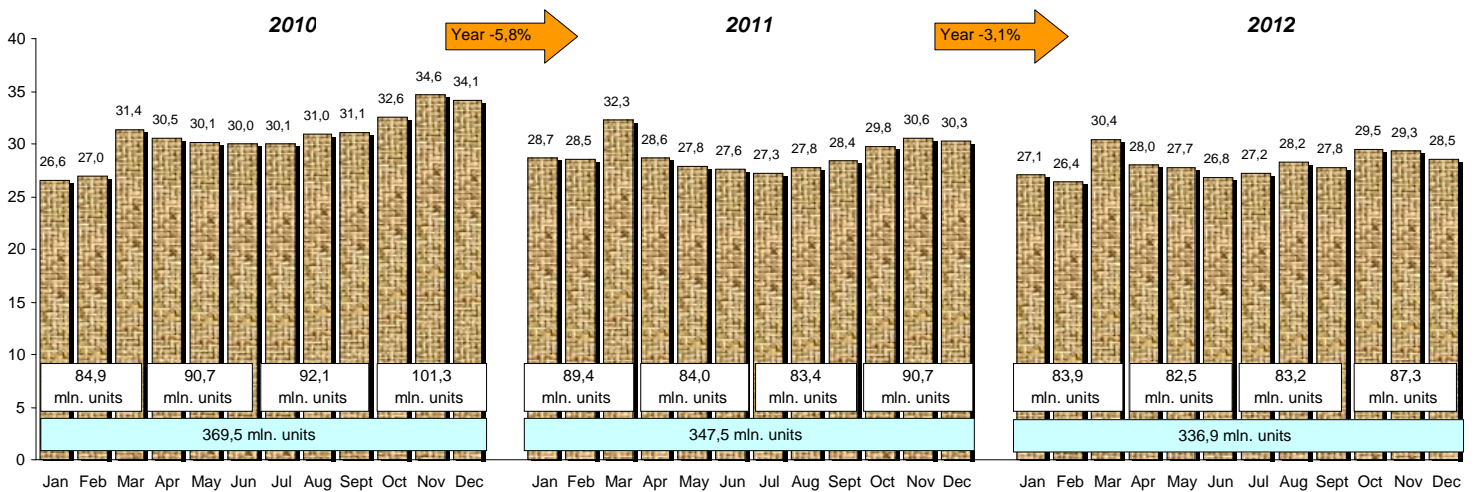
Source: Retail Audit, medicines, Ukraine, Business-Credit Ltd., January 2013.



Indicator	Jan	Feb	Mar	1Qtr	Apr	May	Jun	2Qtr	Jul	Aug	Sep	3Qtr	Oct	Nov	Dec	4Qtr	Year
GR 2012/2011 (%)	9,3	5,6	8,2	7,7	11,7	12,1	8,4	10,7	11,1	10,3	4,2	8,4	7,3	5,3	3,6	5,4	8,0
GR 2011/2010 (%)	21,6	24,3	21,0	22,2	12,2	15,2	13,5	13,6	11,8	11,3	14,9	12,7	10,9	4,9	6,1	7,2	13,5

(GR – Growth rate)

### 2.6. Dynamics of Ukrainian RX pharmaceutical market in 2010-2012, sales volume (mln. units)



Indicator	Jan	Feb	Mar	1Qtr	Apr	May	Jun	2Qtr	Jul	Aug	Sep	3Qtr	Oct	Nov	Dec	4Qtr	Year
GR 2012/2011 (%)	-5,5	-7,3	-5,8	-6,2	-2,0	-0,3	-2,9	-1,8	-0,4	1,6	-2,1	-0,3	-1,0	-4,1	-6,1	-3,7	-3,1
GR 2011/2010 (%)	7,9	5,6	2,9	5,3	-6,2	-7,7	-8,2	-7,4	-9,3	-10,3	-8,7	-9,4	-8,5	-11,8	-11,1	-10,5	-5,8

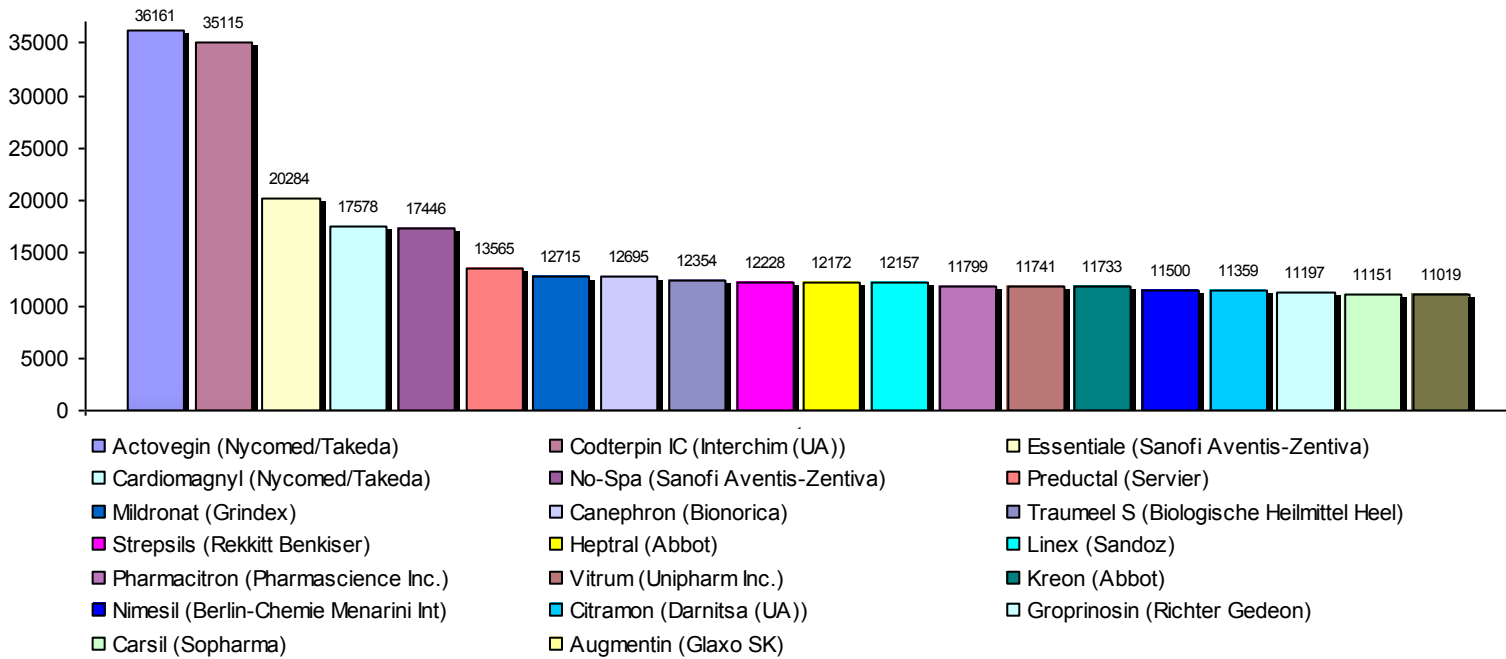
(GR – Growth rate)

**2.7. Retail Market Growth by ATC groups (1st level)**
*Groups ranked by Growth Rate of sales value in 2012 vs 2011*

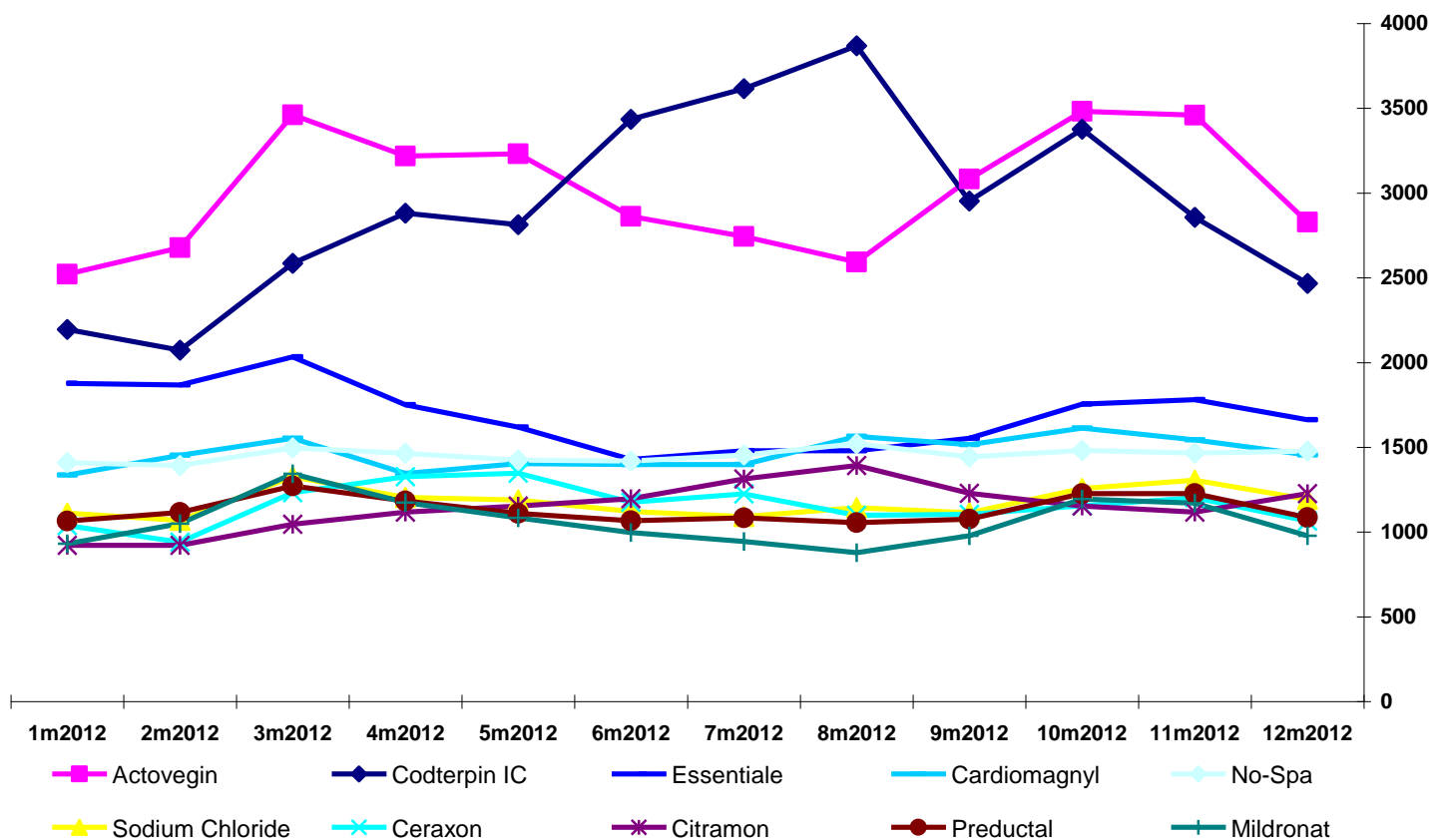
ATC Level 1	SV 2012 (ths. USD)	GR SV 2012 vs 2011 (%)	Sh SV 2012 (%)	EI SV In all 2012 vs 2011 (%)	TU 2012 (ths. )	GR TU 2012 vs 2011 (%)
<b>Retail Market</b>	<b>3055174</b>	<b>6,5</b>	<b>100,00</b>	<b>1,00</b>	<b>1041982</b>	<b>-3,8</b>
<b>C</b> Cardiovascular System	386782	10,1	12,66	1,03	112089	2,6
<b>B</b> Blood and Blood Forming Organs	122340	8,1	4,00	1,02	57776	-1,9
<b>V</b> Various	22364	8,1	0,73	1,02	5529	-2,0
<b>N</b> Nervous System	405508	7,7	13,27	1,01	206499	-4,9
<b>M</b> Musculo-Skeletal System	234594	7,1	7,68	1,01	74898	-2,8
<b>R</b> Respiratory System	422083	6,9	13,82	1,00	158976	-1,1
<b>S</b> Sensory Organs	67097	6,5	2,20	1,00	22505	-3,5
<b>H</b> Systemic Hormonal Preparations, Excl. Sex Hormones	25471	6,5	0,83	1,00	4521	1,7
<b>A</b> Alimentary Tract and Metabolism	622593	6,5	20,38	1,00	205464	-4,2
<b>D</b> Dermatologicals	149734	6,0	4,90	1,00	88508	-10,6
<b>G</b> Genito-Urinary Systems and Sex Hormones	216750	4,3	7,09	0,98	24073	0,3
<b>J</b> General Antiinfectives for Systemic Use	254067	3,6	8,32	0,97	63224	-10,4
<b>P</b> Antiparasitic Products	17473	1,0	0,57	0,95	6675	-7,0
<b>L</b> Antineoplastic and Immunomodulating Agents	108316	-1,4	3,55	0,93	11245	-2,5

**2.8. Changes in average prices weighted by packs in ATC groups**
*Groups ranked by Growth Rate of retail price weighted in 2012*

ATC Level 1	RtlPrsiW 2012 ( USD)	GR RtlPrsiW 2012vs 2011 (%)	RtlPrsi 2012 ( USD)	GR RtlPrsi 2012 vs 2011 (%)	RtlPrsi/Whs PrCntr 2012 ( USD)
<b>Retail Market</b>	<b>2,93</b>	<b>10,69</b>	<b>15,42</b>	<b>-4,37</b>	<b>1,21</b>
<b>D</b> Dermatologicals	1,69	18,58	5,05	1,7	1,21
<b>J</b> General Antiinfectives for Systemic Use	4,02	15,6	15,14	-1,96	1,31
<b>N</b> Nervous System	1,96	13,17	13,27	6,36	1,21
<b>A</b> Alimentary Tract and Metabolism	3,03	11,15	8,03	0,53	1,2
<b>S</b> Sensory Organs	2,98	10,41	8,04	34,2	1,18
<b>V</b> Various	4,04	10,33	69,5	-5,92	1,2
<b>B</b> Blood and Blood Forming Organs	2,12	10,22	28,21	12,72	1,17
<b>M</b> Musculo-Skeletal System	3,13	10,1	11,73	-3,72	1,19
<b>P</b> Antiparasitic Products	2,62	8,61	4,36	1,44	1,2
<b>R</b> Respiratory System	2,66	8,06	5,39	5,97	1,28
<b>C</b> Cardiovascular System	3,45	7,26	8,25	3,44	1,17
<b>H</b> Systemic Hormonal Preparations, Excl. Sex Hormones	5,63	4,76	25,08	1,36	1,16
<b>G</b> Genito-Urinary Systems and Sex Hormones	9	3,95	17,39	1,17	1,18
<b>L</b> Antineoplastic and Immunomodulating Agents	9,63	1,18	104,71	-17,02	1,15

**2.9. Top-20 retail market products ranked by sales value in 2012, (ths. USD)**


(by row, left to right)

**2.10. Top-10 retail market products, 2012, (ths. USD)**




2.11. Top-10 retail market corporation, 2012, (ths. USD)

