



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)

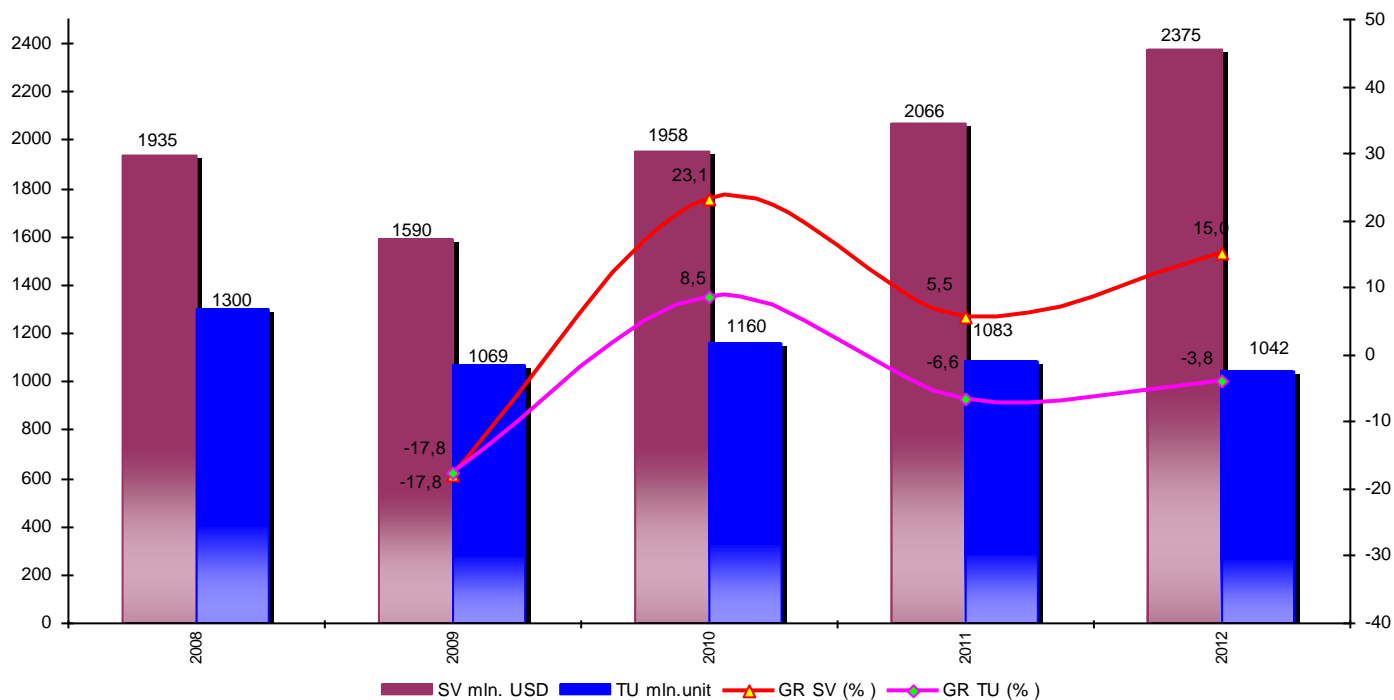
Prices

- **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

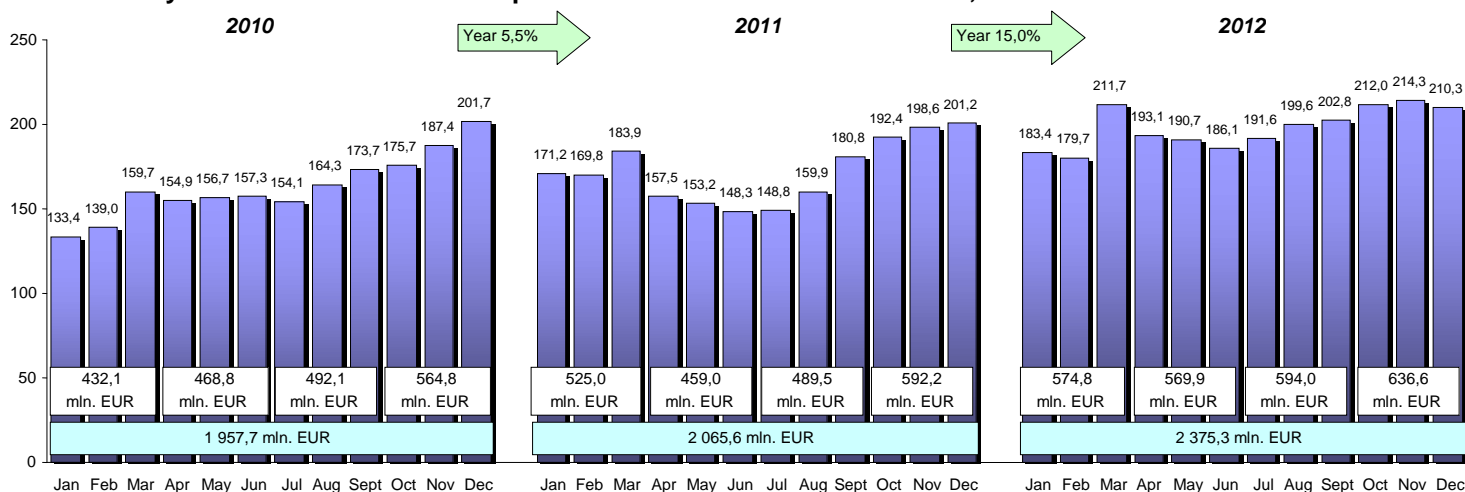
I Ukrainian Indices

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



II. Ukrainian pharmaceutical retail market dynamics.

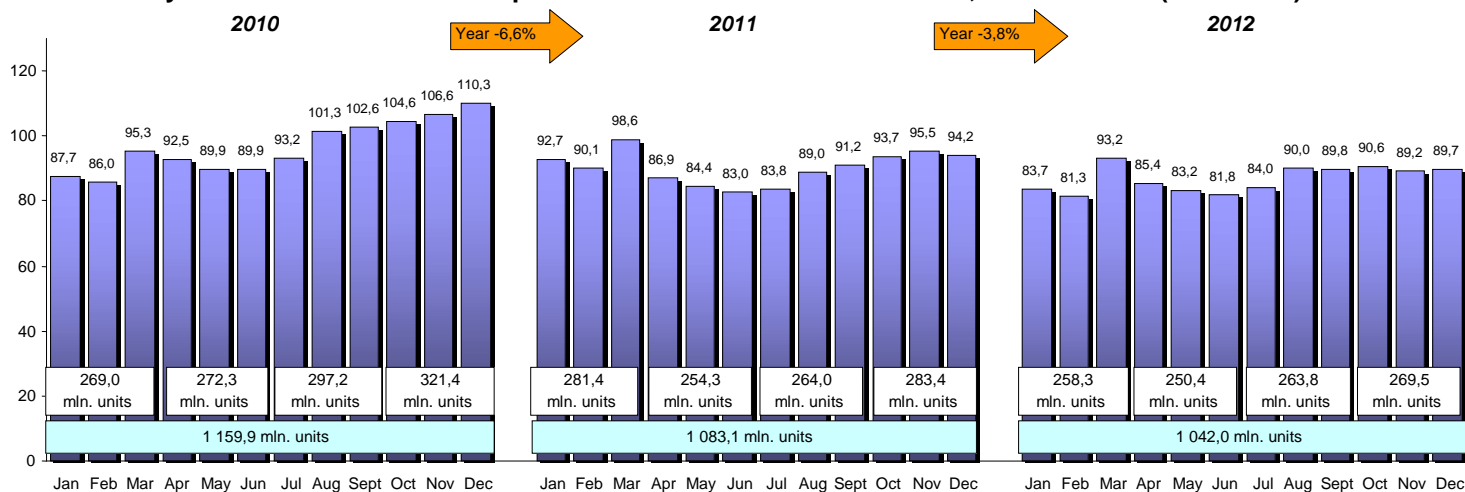
2.1. Dynamics of Ukrainian retail pharmaceutical market in 2010-2012, sales out mln. EUR



Indicator	Jan	Feb	Mar	1Qtr	Apr	May	Jun	2Qtr	Jul	Aug	Sep	3Qtr	Oct	Nov	Dec	4Qtr	Year
GR 2012/2011 (%)	7,1	5,8	15,1	9,5	22,6	24,5	25,5	24,2	28,8	24,8	12,2	21,4	10,2	7,9	4,5	7,5	15,0
GR 2011/2010 (%)	28,3	22,2	15,2	21,5	1,7	-2,2	-5,7	-2,1	-3,4	-2,7	4,1	-0,5	9,5	6,0	-0,2	4,9	5,5
Share Rx /OTC 2012(%)	52,83	52,94	52,75	52,83	54,04	55,66	55,53	55,07	56,02	54,84	51,59	54,11	53,24	53,94	52,36	53,19	53,78
Share Foreign /Domestic 2012 (%)	73,79	73,82	74,20	73,95	74,13	73,87	73,33	73,78	73,04	72,89	73,83	73,26	74,03	74,29	74,31	74,21	73,82

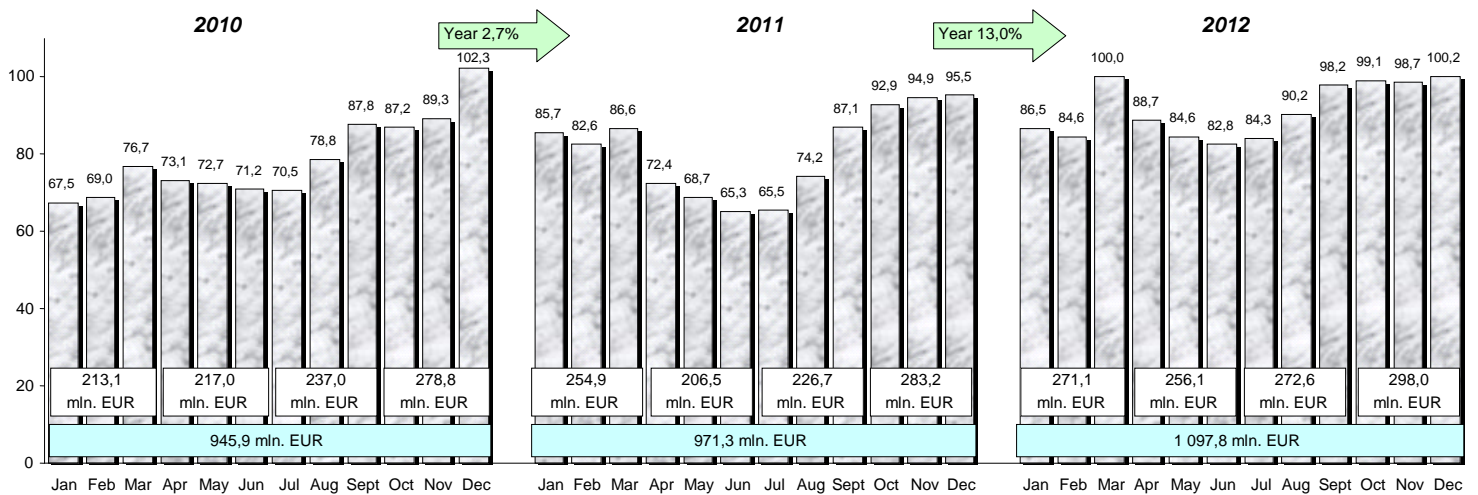
(GR – Growth rate)

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



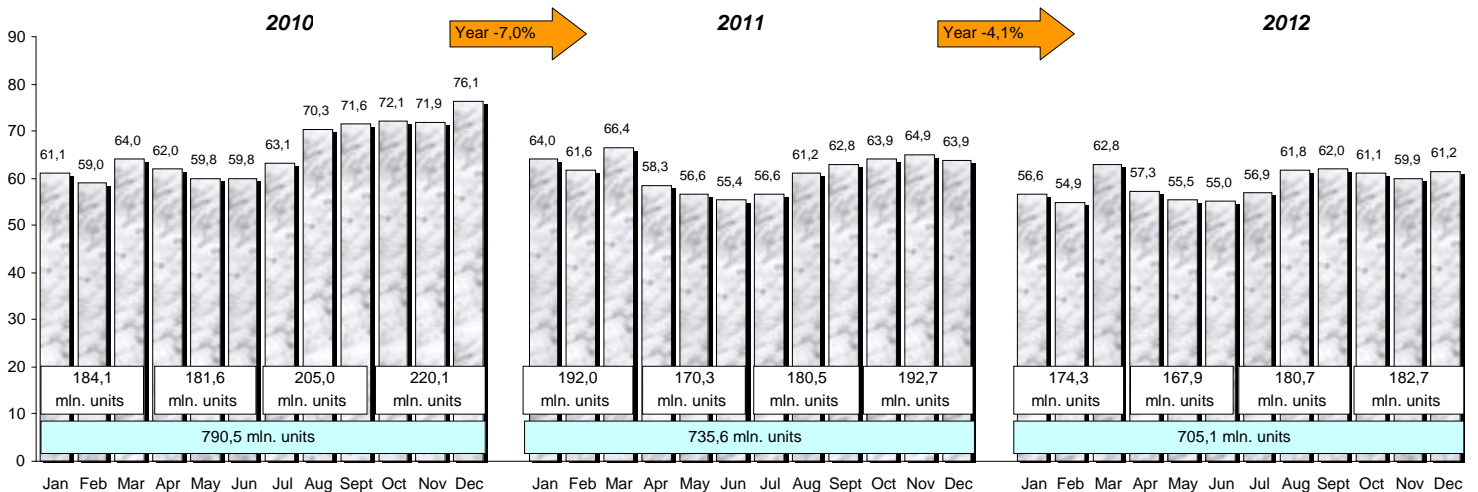
Indicator	Jan	Feb	Mar	1Qtr	Apr	May	Jun	2Qtr	Jul	Aug	Sep	3Qtr	Oct	Nov	Dec	4Qtr	Year
GR 2012/2011 (%)	-9,7	-9,8	-5,5	-8,2	-1,8	-1,4	-1,4	-1,5	0,2	1,1	-1,5	-0,1	-3,4	-6,6	-4,7	-4,9	-3,8
GR 2011/2010 (%)	5,7	4,8	3,5	-9,2	-6,1	-6,1	-7,7	4,6	-10,0	-12,2	-11,2	-11,2	-10,4	-10,4	-14,6	-11,8	-6,6
Share Rx /OTC 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 (%)	37,83	38,23	38,87	38,33	38,05	37,01	36,09	37,06	35,14	35,18	38,97	36,46	39,60	39,66	39,83	39,70	37,72

(GR – Growth rate)

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


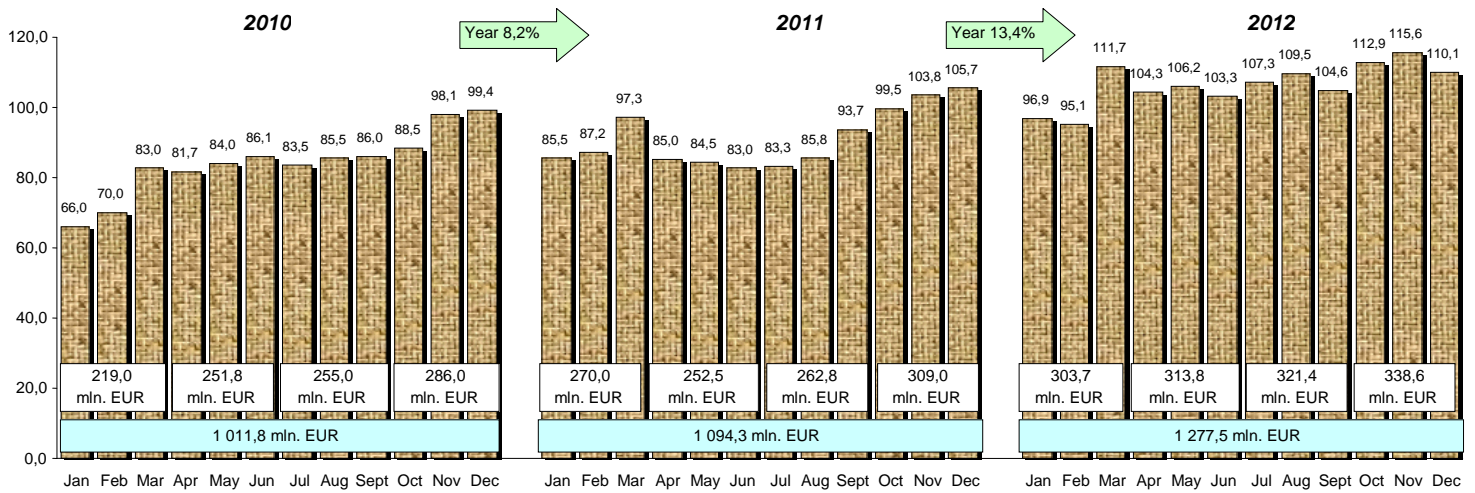
Indicator	Jan	Feb	Mar	1Qtr	Apr	May	Jun	2Qtr	Jul	Aug	Sep	3Qtr	Oct	Nov	Dec	4Qtr	Year
GR 2012/2011 (%)	0,9	2,4	15,5	6,3	22,5	23,1	26,7	24,0	28,7	21,6	12,8	20,3	6,7	4,0	5,0	5,2	13,0
GR 2011/2010 (%)	27,0	19,8	13,0	19,6	-1,0	-5,5	-8,2	-4,9	-7,2	-5,8	-0,8	-4,4	6,6	6,2	-6,7	1,6	2,7

(GR – Growth rate)

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


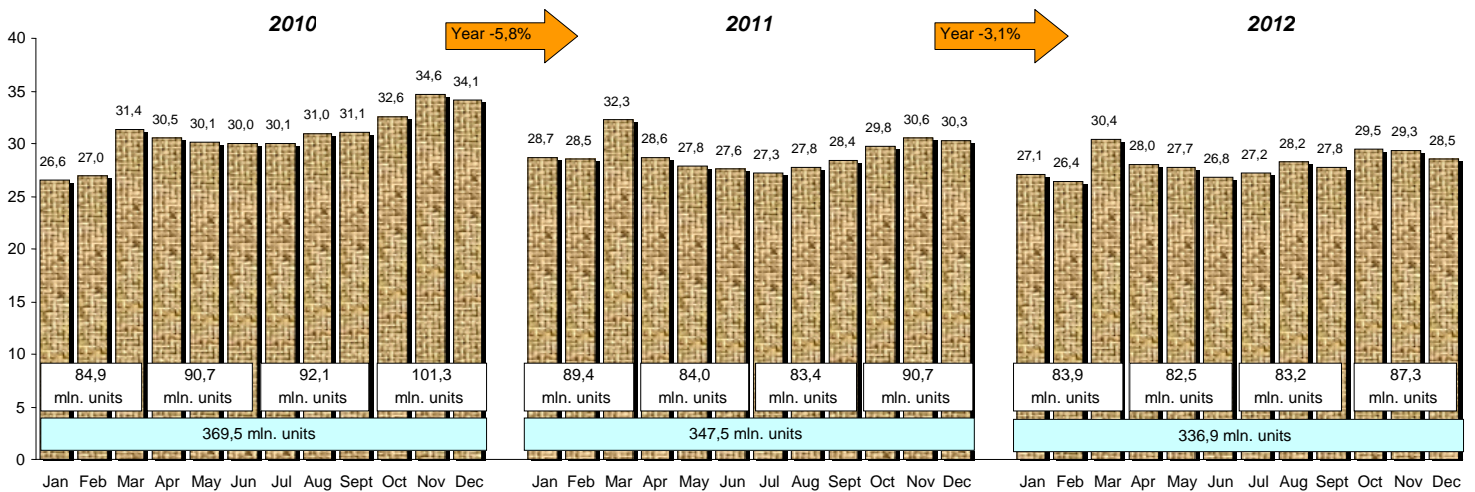
Indicator	Jan	Feb	Mar	1Qtr	Apr	May	Jun	2Qtr	Jul	Aug	Sep	3Qtr	Oct	Nov	Dec	4Qtr	Year
GR 2012/2011 (%)	-11,5	-10,9	-5,3	-9,2	-1,7	-1,9	-0,6	-1,4	0,5	1,0	-1,2	0,1	-4,5	-7,8	-4,1	-5,5	-4,1
GR 2011/2010 (%)	4,8	4,4	3,7	4,3	-6,0	-5,3	-7,5	-6,2	-10,4	-13,0	-12,2	-11,9	-11,3	-9,8	-16,1	-12,4	-7,0

(GR – Growth rate)

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


Indicator	Jan	Feb	Mar	1Qtr	Apr	May	Jun	2Qtr	Jul	Aug	Sep	3Qtr	Oct	Nov	Dec	4Qtr	Year
GR 2012/2011 (%)	13,3	9,0	14,8	12,5	22,7	25,6	24,6	24,3	28,8	27,7	11,6	22,3	13,5	11,4	4,2	9,6	16,7
GR 2011/2010 (%)	29,7	24,6	17,2	23,3	4,0	0,6	-3,7	0,3	-0,3	0,3	9,0	3,0	12,4	5,8	6,4	8,0	8,2

(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

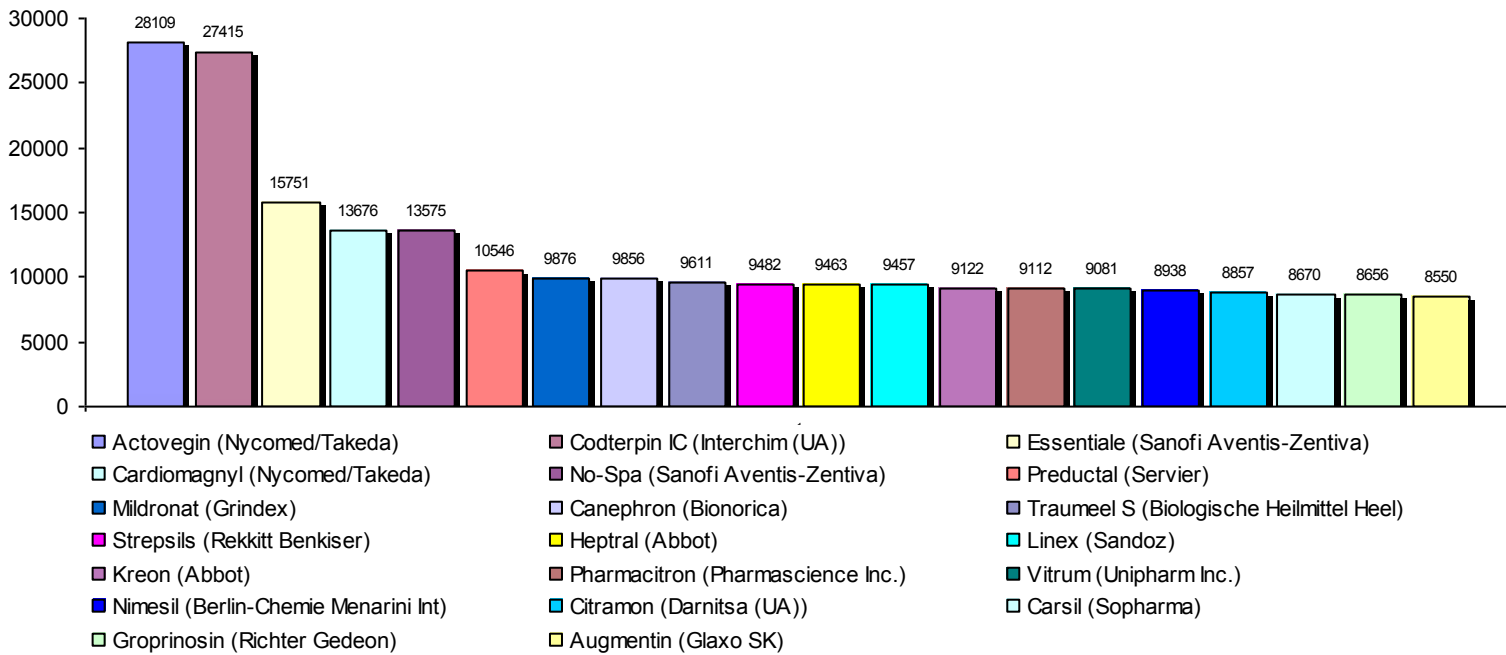
(GR – Growth rate)

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

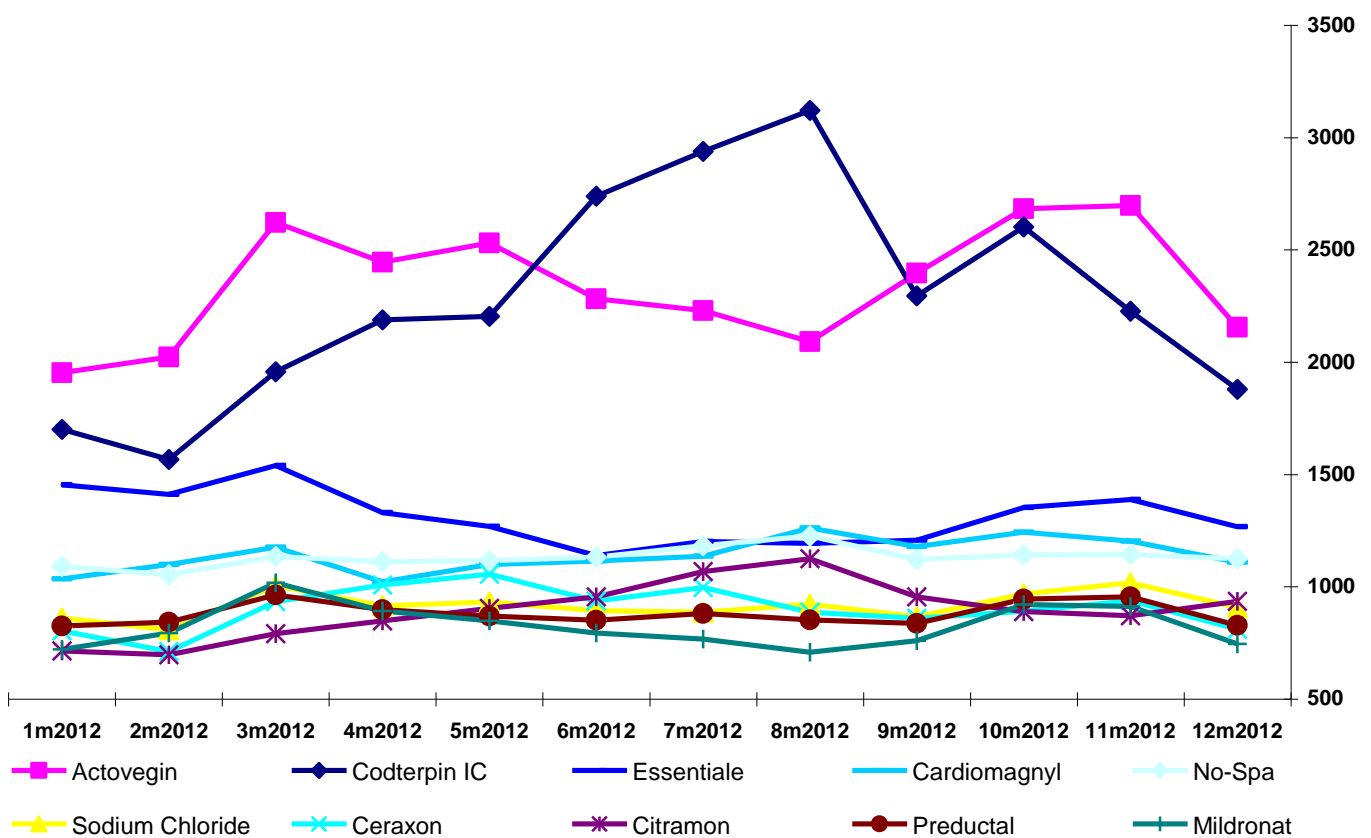
ATC Level 1	SV 2012 (ths. EUR)	GR SV 2012 vs 2011 (%)	Sh SV 2012 (%)	EI SV In all 2012 vs 2011 (%)	TU 2012 (ths.)	GR TU 2012 vs 2011 (%)
Retail Market	2375290	14,99	100	1	1041982	-3,8
C Cardiovascular System	300897	19,1	12,67	1,04	112089	2,6
B Blood and Blood Forming Organs	95160	17,0	4,01	1,02	57776	-1,9
V Various	17395	16,8	0,73	1,02	5529	-2,0
N Nervous System	315282	16,2	13,27	1,01	206499	-4,9
M Musculo-Skeletal System	182571	15,9	7,69	1,01	74898	-2,8
S Sensory Organs	52291	15,5	2,20	1,00	22505	-3,5
H Systemic Hormonal Preparations, Excl. Sex Hormones	19836	15,5	0,84	1,00	4521	1,7
D Dermatologicals	116716	15,2	4,91	1,00	88508	-10,6
A Alimentary Tract and Metabolism	483975	15,0	20,38	1,00	205464	-4,2
R Respiratory System	327563	14,9	13,79	1,00	158976	-1,1
G Genito-Urinary Systems and Sex Hormones	168692	12,9	7,10	0,98	24073	0,3
J General Antiinfectives for Systemic Use	197329	11,6	8,31	0,97	63224	-10,4
P Antiparasitic Products	13601	9,2	0,57	0,95	6675	-7,0
L Antineoplastic and Immunomodulating Agents	83980	5,8	3,54	0,92	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 (EUR)	GR RtlPrsiW 2012vs 2011 (%)	RtlPrsi 2012 (EUR)	GR RtlPrsi 2012 vs 2011 (%)	RtlPrsi/Whs PrCntr 2012 (EUR)
Retail Market	2,28	19,53	11,99	3,4	1,21
D Dermatologicals	1,32	28,79	3,93	10,18	1,21
J General Antiinfectives for Systemic Use	3,12	24,55	11,78	6,08	1,31
N Nervous System	1,53	22,17	10,33	15,21	1,21
A Alimentary Tract and Metabolism	2,36	20,05	6,25	8,72	1,2
S Sensory Organs	2,32	19,71	6,23	44,69	1,18
B Blood and Blood Forming Organs	1,65	19,22	21,94	21,67	1,17
M Musculo-Skeletal System	2,44	19,2	9,11	3,99	1,19
V Various	3,15	19,19	54,03	1,77	1,2
P Antiparasitic Products	2,04	17,45	3,39	9,76	1,2
R Respiratory System	2,06	16,13	4,19	14,67	1,28
C Cardiovascular System	2,68	16,06	6,41	11,94	1,17
H Systemic Hormonal Preparations, Excl. Sex Hormones	4,39	13,59	19,51	9,79	1,16
G Genito-Urinary Systems and Sex Hormones	7,01	12,48	13,51	9,46	1,18
L Antineoplastic and Immunomodulating Agents	7,47	8,53	81,45	-10,26	1,15

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


(by row, left to right)

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


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

