

# UKRAINIAN PHARMACEUTICAL MARKET

## SMD Monthly Review

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Terms and Abbreviations

UAH – Ukrainian Hryvnia

USD – US Dollar

EUR - Euro

GAP – growth vs. previous period of the current year

PPG – growth vs. the same period of the previous year

EI – Evolution Index

MAT – Moving Annual Total

YTD – Year To Date

MS – Market Share

Mio – Million

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# August 2016

SMD Analytics and Country Survey

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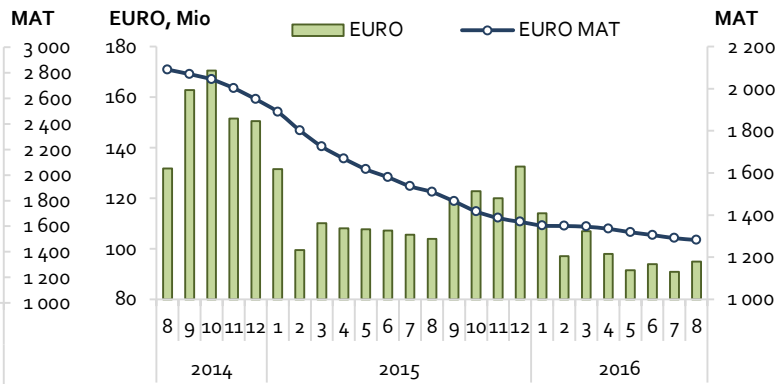
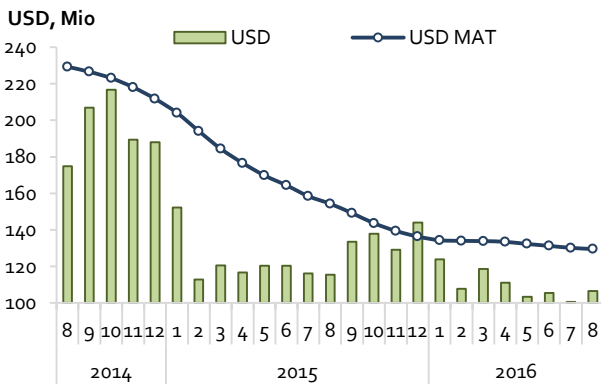
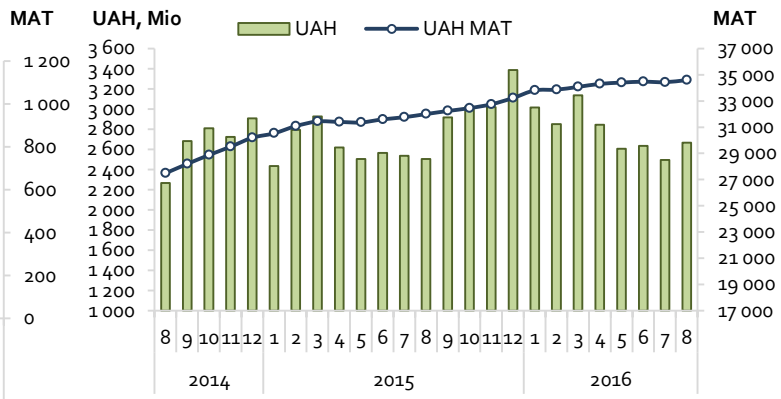
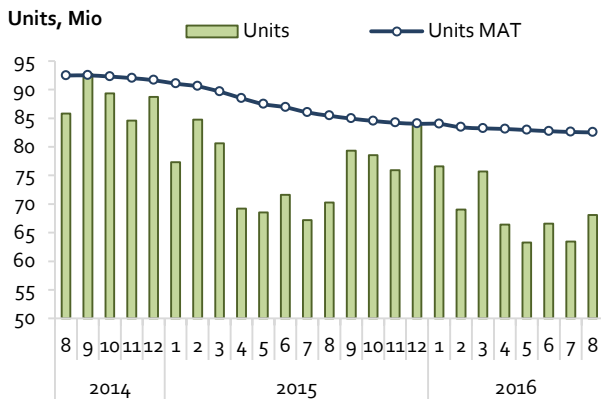
Indicator	August 2016			YTD – August 2016		MAT- August 2016	
	Mio	GAP, %	PPG, %	Mio	PPG, %	Mio	PPG, %
Units	68	7%	-3%	549	-7%	867	-8%
UAH	2 665	7%	6%	22 247	7%	34 593	8%
USD	106	6%	-8%	877	-10%	1 422	-20%
EUR	95	5%	-9%	787	-10%	1 281	-15%

In August 2016 retail market was equal to 2 665 Mio UAH., 68 Mio Units, 106 Mio USD and 95 Mio EUR.

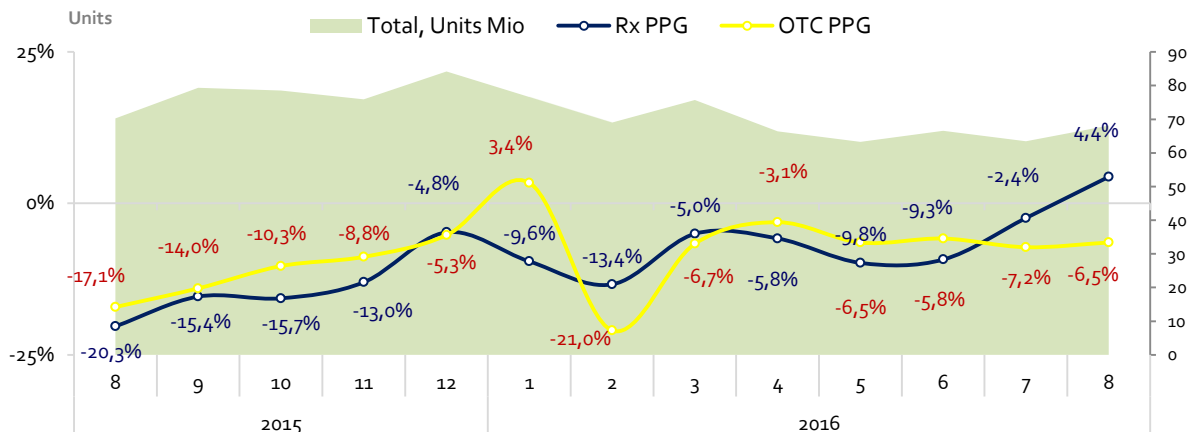
In comparison to July 2016 was a positive trend in all indicators: Units (+7%), UAH (+7%), USD (+6%) and EUR (+5%).

The market compared to August of last year showed negative growth in Units (-3%) and foreign currency (-8% in USD and (-9%) in EUR), but positive in national currency (+6%).

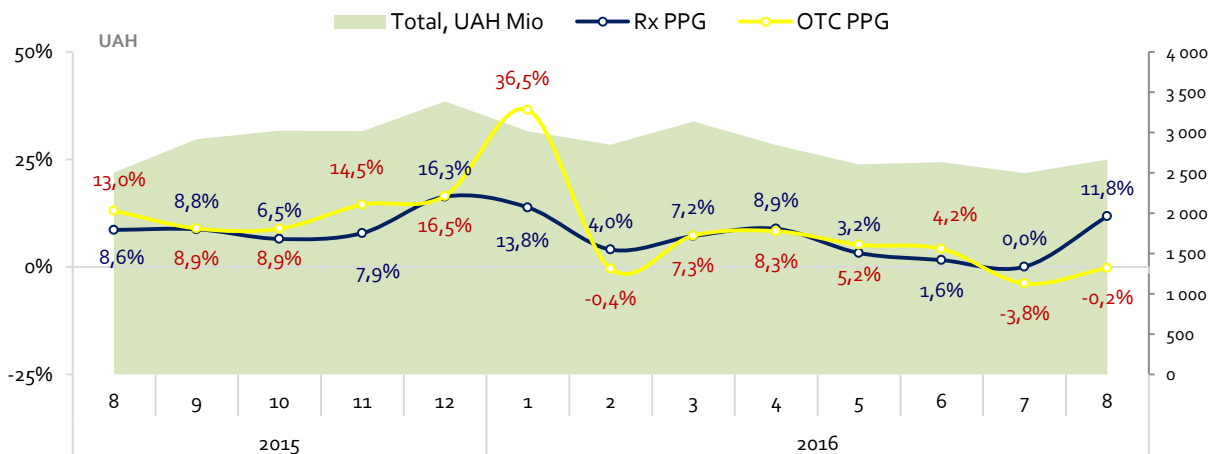
Based on MAT (Moving Annual Total) there is a positive growth in UAH (+8% over the same period last year), but negative in Units (-8%), in USD (-20%) and in EUR (-15%).



## Sales dynamics of medicines, volume



## Sales dynamics of medicines, value



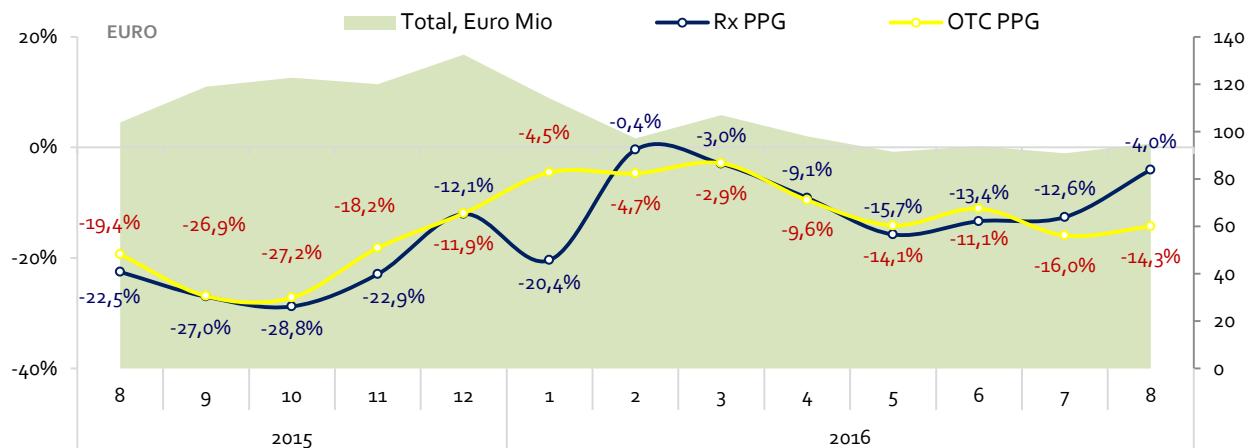
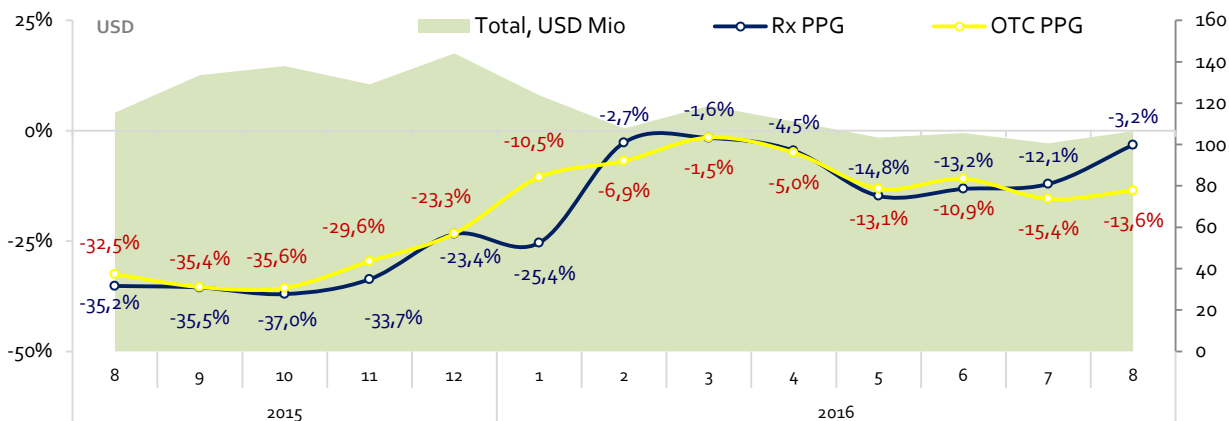
In August 2016 OTC segment occupied 66% of medicines market share in Units and amounted to 45 Mio Units, in value – 41% of medicines market share and amounted to 1 105 Mio UAH., in foreign currency - 44 Mio USD, 39 Mio EUR.

Dynamics of OTC segment in August 2016 compared to August 2015 was negative in national currency (-0,2%), in Units (- 7%) and foreign currency: in USD (-14%) and in EUR (-14%).

Rx segment in August 2016 was amounted to 23 Mio Units and held 34% % of the pharmaceutical market. In monetary terms, it held 59% of the market and was equal to 1 560 Mio UAH., 62 Mio USD and 56 Mio EUR.

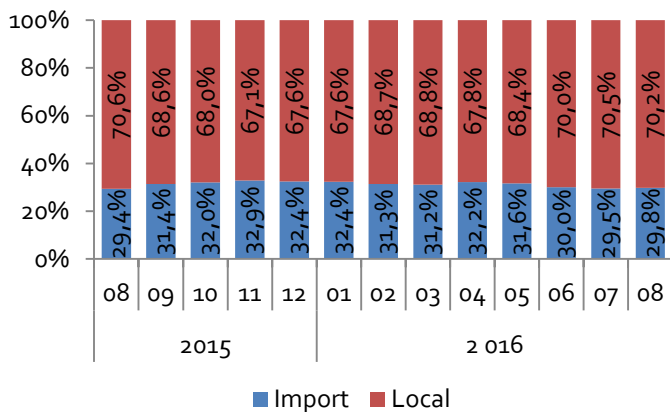
Rx segment showed a positive trend compared to the same month last year in UAH (+12%), in Units (+4%), but negative in foreign currency: in USD (-3%), in EUR (-4%).

## Sales dynamics of medicines, value

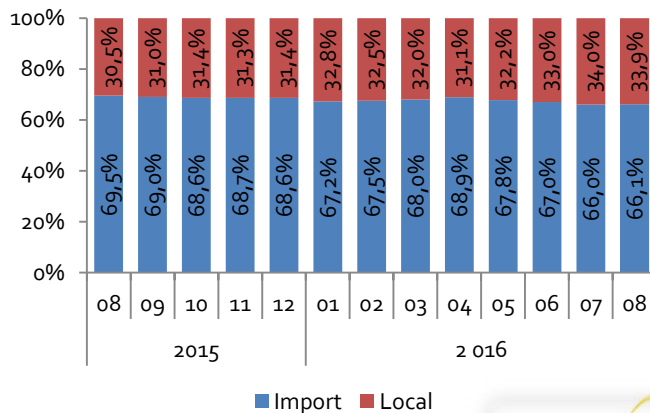


## Corporations ratio: local vs. foreign

Medicines' market – Retail segment, volume



Medicines' market – Retail segment, value



## Leading corporations in medicines' segment

TOP 50 corporation: local and foreign

In August 2016 TOP 50 corporations held 75% of the market in value. 17 of them are local companies which make 29% of the market, while the share of 33 foreign corporations is 46%.

TOP 50 corporations in volume held 85% of the market. While local corporations held 67% of the market and their number was 26 companies, and 24 foreign companies occupied 17% of the market.

Dynamic performance of local corporations is much higher in monetary terms than that of foreign companies included in the TOP 50.

### Market dynamics in UAH

UAH	August 2016				YTD – August 2016				MAT – August 2016			
	MS, %	Δ MS, %	PPG, %	EI	MS, %	Δ MS, %	PPG, %	EI	MS, %	Δ MS, %	PPG, %	EI
Total market	100%	0%	6%	100	100%	0%	7%	100	100%	0%	8%	100
TOP-50	75%	-1%	5%	99	76%	-1%	5%	98	76%	-1%	6%	98
Local 17	29%	3%	19%	112	28%	1%	12%	105	28%	1%	14%	106
Foreign 33	46%	-4%	-2%	92	48%	-3%	1%	95	48%	-3%	2%	95

### Market dynamics in Units

Units	August 2016				YTD – August 2016				MAT – August 2016			
	MS, %	Δ MS, %	PPG, %	EI	MS, %	Δ MS, %	PPG, %	EI	MS, %	Δ MS, %	PPG, %	EI
Total market	100%	0%	-3%	100	100%	0%	-7%	100	100%	0%	-8%	100
TOP-50	85%	-1%	-4%	99	85%	-2%	-9%	98	84%	-1%	-9%	99
Local 26	67%	0%	-3%	100	66%	-2%	-9%	97	66%	-1%	-9%	99
Foreign 24	17%	-1%	-7%	96	18%	0%	-6%	101	19%	0%	-10%	99

In the TOP 20 corporations (based on MAT) FARMAK is unchanged leader in UAH and DARNITSA in Units.

In August 2016 the highest growth demonstrates YURIA-PHARM (+25%) in UAH and (+50%) in Units.

Based on the results of MAT August 2016 in UAH KIEV VITAMIN FACTORY and YURIA-PHARM strengthen their positions in ranking. Corporations have moved from 15th to 13th and from 19th to 17th respectively. ARTERIUM moved from 6-th to 2nd position, SANOFI moved from 4th to 3rd.

Based on the results of MAT August 2016 in Units, local companies demonstrated the most significant growth in ranking. LUBNYFARM moved from 23th to 17th, STADA moved from 21-th position to 20-th and YURIA-PHARM moved from 11-th position to 9-th

UAH	Ranking		August 2016				YTD – August 2016				MAT – August 2016			
	2016	2015	MS, %	MS (+/-), %	PPG, %	EI	MS, %	MS (+/-), %	PPG, %	EI	MS, %	MS (+/-), %	PPG, %	EI
<b>Total market</b>			<b>100%</b>	<b>0%</b>	<b>6%</b>	<b>100</b>	<b>100%</b>	<b>0%</b>	<b>7%</b>	<b>100</b>	<b>100%</b>	<b>0%</b>	<b>8%</b>	<b>100</b>
FARMAK	1	1	5,7%	0,8%	22,9%	115	5,3%	0,5%	17,9%	111	5,3%	0,5%	18,6%	110
ARTERIUM	2	6	4,0%	0,6%	24,1%	117	3,9%	0,7%	28,7%	121	3,8%	0,7%	32,3%	122
SANOFI	3	4	3,7%	-0,2%	1,1%	95	3,8%	-0,1%	4,9%	98	3,8%	-0,1%	5,8%	98
MENARINI GROUP	4	2	3,6%	-0,5%	-7,5%	87	3,7%	-0,5%	-6,1%	88	3,7%	-0,5%	-5,2%	88
GLAXOSMITHKLINE	5	3	3,1%	-0,7%	-13,1%	82	3,4%	-0,4%	-4,2%	90	3,6%	-0,4%	-1,8%	91
DARNITSA	6	5	3,6%	0,1%	10,7%	104	3,6%	0,3%	15,3%	108	3,5%	0,2%	14,9%	106
BAYER HEALTHCARE	7	9	2,6%	-0,2%	-0,6%	93	2,9%	0,0%	6,8%	100	2,9%	0,1%	11,0%	103
ZDOROVJE GROUP	8	8	3,0%	0,3%	18,5%	111	2,9%	-0,2%	-0,3%	94	2,8%	-0,1%	2,8%	95
NOVARTIS	9	7	2,8%	-0,3%	-2,3%	92	2,8%	-0,3%	-4,4%	90	2,8%	-0,3%	-3,0%	90
TAKEDA	10	10	2,4%	-0,1%	1,6%	95	2,5%	-0,1%	1,7%	95	2,5%	-0,2%	1,4%	94
TEVA	11	14	2,1%	-0,2%	-2,9%	91	2,3%	0,1%	10,4%	104	2,4%	0,0%	9,6%	101
KRKA	12	13	2,1%	-0,1%	3,3%	97	2,2%	-0,2%	-2,4%	92	2,2%	-0,2%	-0,3%	92
KIEV VITAMIN FACTORY	13	15	2,1%	0,0%	5,6%	99	2,2%	0,1%	13,0%	106	2,2%	0,2%	19,5%	111
SERVIER GROUP	14	12	2,2%	-0,1%	1,8%	96	2,2%	-0,2%	-0,9%	93	2,2%	-0,3%	-4,1%	89
GEDEON RICHTER	15	11	2,0%	-0,5%	-15,1%	80	2,2%	-0,5%	-13,1%	82	2,2%	-0,5%	-12,2%	81
ACTAVIS	16	16	1,7%	-0,2%	-6,2%	88	1,7%	0,0%	4,7%	98	1,7%	0,0%	7,1%	99
YURIA-PHARM	17	19	1,9%	0,6%	50,3%	141	1,7%	0,2%	20,4%	113	1,6%	0,2%	23,7%	114
ABBOTT	18	17	1,4%	-0,3%	-11,6%	83	1,5%	-0,2%	-4,4%	90	1,6%	-0,1%	1,1%	94
BORSHCHAHIVSKY CHIMPHARM	19	18	1,4%	0,0%	6,0%	100	1,5%	0,0%	5,8%	99	1,5%	0,0%	7,7%	100
STADA	20	20	1,3%	-0,1%	-3,9%	90	1,4%	0,1%	12,7%	106	1,5%	0,1%	18,1%	109
Others			47,2%	1,2%	9,3%	103	46,2%	0,7%	8,2%	102	46,2%	0,7%	9,7%	101

Units	Ranking		August 2016				YTD – August 2016				MAT – August 2016			
	2016	2015	MS, %	MS (+/-), %	PPG, %	EI	MS, %	MS (+/-), %	PPG, %	EI	MS, %	MS (+/-), %	PPG, %	EI
<b>Total market</b>			<b>100%</b>	<b>0%</b>	<b>-3%</b>	<b>100</b>	<b>100%</b>	<b>0%</b>	<b>-7%</b>	<b>100</b>	<b>100%</b>	<b>0%</b>	<b>-8%</b>	<b>100</b>
DARNITSA	1	1	13,4%	-0,9%	-9,3%	94	13,2%	0,4%	-3,7%	103	12,8%	0,3%	-5,8%	103
FARMAK	2	2	7,6%	-0,1%	-4,8%	98	7,8%	-0,1%	-8,1%	99	8,0%	0,1%	-7,6%	101
ARTERIUM	3	3	7,6%	0,1%	-1,2%	102	6,7%	0,0%	-7,3%	100	6,7%	0,3%	-4,0%	105
ZDOROVJE GROUP	4	4	5,0%	-0,1%	-4,3%	99	5,2%	-0,7%	-17,3%	89	5,3%	-0,4%	-15,1%	93
KIEV VITAMIN FACTORY	5	5	3,9%	-0,4%	-12,8%	90	4,6%	0,2%	-3,6%	103	4,6%	0,3%	-2,0%	107
BORSHCHAHIVSKY CHIMPHARM	6	6	3,5%	-0,5%	-14,3%	88	3,5%	-0,4%	-15,8%	90	3,6%	-0,3%	-15,1%	92
VISHPHA	7	8	3,5%	0,3%	4,9%	108	3,5%	0,5%	10,0%	118	3,4%	0,3%	1,9%	111
VIOLA	8	7	2,6%	-0,8%	-24,6%	78	2,9%	-0,6%	-23,1%	83	2,9%	-0,4%	-18,1%	89
YURIA-PHARM	9	11	2,7%	0,6%	25,1%	129	2,5%	0,2%	0,6%	108	2,4%	0,2%	0,1%	109
KRASNAYA ZVEZDA	10	10	2,6%	0,4%	13,4%	117	2,2%	-0,1%	-9,8%	97	2,1%	-0,2%	-14,8%	93
FITOFARM ARTEMOV	11	9	2,1%	0,0%	-2,6%	100	1,9%	-0,8%	-36,0%	69	1,8%	-0,9%	-39,3%	66
MENARINI GROUP	12	13	1,4%	-0,3%	-20,1%	82	1,5%	-0,1%	-14,3%	92	1,6%	-0,3%	-20,9%	86
GLAXOSMITHKLINE	13	12	1,3%	-0,4%	-26,5%	76	1,5%	-0,3%	-24,3%	81	1,6%	-0,4%	-26,2%	80
SANOFI	14	14	1,4%	-0,1%	-12,1%	91	1,5%	-0,1%	-11,4%	95	1,5%	-0,1%	-14,6%	93
LEKHIM GROUP	15	16	1,4%	0,0%	-4,2%	99	1,5%	0,0%	-7,3%	100	1,5%	0,1%	-2,9%	106
TERNOPHARM	16	17	1,3%	0,2%	11,6%	115	1,3%	-0,1%	-12,0%	94	1,4%	0,1%	-4,0%	105
LUBNYFARM	17	23	2,0%	0,1%	2,1%	105	1,4%	0,3%	19,2%	128	1,3%	0,3%	17,5%	128
ACTAVIS	18	18	1,1%	-0,3%	-21,4%	81	1,2%	-0,1%	-14,2%	92	1,2%	-0,1%	-14,3%	93
LEKTRAVY	19	19	1,1%	0,2%	22,8%	127	1,1%	-0,1%	-12,9%	93	1,2%	-0,1%	-17,1%	90
STADA	20	21	0,9%	-0,1%	-15,9%	87	1,1%	0,0%	-3,6%	103	1,1%	0,1%	-2,2%	107
Others			33,6%	2,2%	3,6%	107	33,9%	1,9%	-1,3%	106	34,0%	1,1%	-5,1%	103

## We Support Market in its Development

Founded in 2003, **SMD (SUPPORT in MARKET DEVELOPMENT)** is the leading strategic decision support partner to the pharmaceutical industry. Covering 10 CIS and Baltic countries including Ukraine, Belarus, Moldova, Azerbaijan, Georgia, Armenia, Kazakhstan, Kyrgyzstan, Uzbekistan, SMD has always strived to provide its clients with innovative products and services that meet their expectations today and anticipate their future needs.

Powered by an unmatched breadth of competencies, SMD has taken hold at the abovementioned markets to become a trusted advisor for:

### Pharmaceutical Companies and Representative Offices

- Pre-launch
- Strategic consulting
- Competitive intelligence studies
- Multiple -purpose models and strategic planning

### Local Pharmaceutical Producers

- Revising the portfolio
- Providing sales markets for the current portfolio
- Market departments staff trainings and support

### Distributors/Pharmacy Chains

- Efficient portfolio management
- Pharmacy chains staff trainings
- Market environment examination
- Competitors' environment tracing
- Efficient partners' environment developing

### Government/NGOs

**(banks, business associations, investment companies, insurance companies, non-commercial organizations)**

- Pharmaceutical market management
- Investment projects development
- Social projects participation
  
- SMD is a long-term USAID's (United States Agency for International Development) partner in social projects of life standards raising and morbidity rate decrease.

**We are happy to support you with evidence-based business guidance based on a unique, fully customizable approach in order to meet your business needs!**

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