RUSSIAN Pharmaceutical Market

Issue: January 2007

- Retail audit of Russian pharmaceutical market – November 2006
- RTU drugs import in Russia – October 2006

All information is based on retail audit

of Russian pharmaceutical market data by DSM Group,

QMS meets the requirements of **ISO 9001:2000**

Moscow, 2007

CONTENTS

CJSC "DSM Group"

General Director
Kuzin Alexander

Research Director
Shulyak Sergey

Head of Department of Retail Audit
Nechaeva Julia

Senior Analyst
Chernyadieva Natalia

Senior Provisor
Nasekina Ekaterina

Translation & Publishing
Sidorenkova Olga

Analytic Report
RUSSIAN Pharmaceutical Market
Issue: January 2007

Address: 7, Building 2,
5-th Yamskogo Polya Street,
Moscow, 125040

Phone:
+7 (495) 780-72-63, 780-72-64
Fax: +7 (495) 780-72-65

www.dsm.ru

SUMMARY

Commercial market volume of ready-to-use (RTU) drugs decreased by 5.6% in November 2006 compared to October and amounted to 405 mln dollars (VAT included), which is 11% higher than in November 2005. **Commercial market volume of RTU drugs in pharmacy purchase prices** increased over the period of 11 months of 2006 by 16.7% compared to the same period of 2005.

The weighted average **price per drug package** on Russian commercial market in rubles has grown for 3% more from 37.97 rubles in October 2006 to 39.22 rubles in November 2006. Prices in dollars have grown from 1.41 dollars in September 2006 to 1.47 dollars in November 2006. The growth is explained by the fact that drugs consumption in packs has been staying the same as well as sales value has been growing.

In November 2006, the aggregate **Laspeyres index** figure was 1.029 in ruble terms and 1.091 in dollar terms. **The prices in dollar terms in November 2006 have grown by 1.6% and the prices in ruble terms - by 0.5%** compared to October 2006. Prices for the TOP-100 brands changed insignificantly, in November 2006 they increased by 0.8% in rubles compared to that in January 2006.

Change in drugs consumption structure was observed in October-November 2006: **decrease in share of drugs** priced under 500 rubles, due to increase in share of **expensive drugs** (more than 500 rubles) **by more than 1%**. Expensive drugs sales volume increased by 4% in November and amounted to more than 12% of commercial drugs market.

Sanofi-Aventis is the leader of **Russian TOP companies by sales value**, Berlin-Chemie /A.Menarini/ is on the second place while Pharmstandard is on the third place.

Arbidol (its share is 0.97%) leads the **TOP drug trade names** by pharmacy sales value in Russia for November 2006, Essentiale (0.88%) is on the second place and Viagra (0.84%) is on the third place.

In November 2006 **Russian NS (nutritional supplements) pharmacy market volume** amounted to 23.6 mln dollars. During the period of 11 months of 2006, **Russian NS pharmacy market volume** increased in value terms by 16.4% compared to that in 2005.

The **weighted average cost per NS package** in November 2006 increased by 5% compared to October and amounted to 1.62 dollars.

I. Russian commercial market of RTU drugs in November 2006

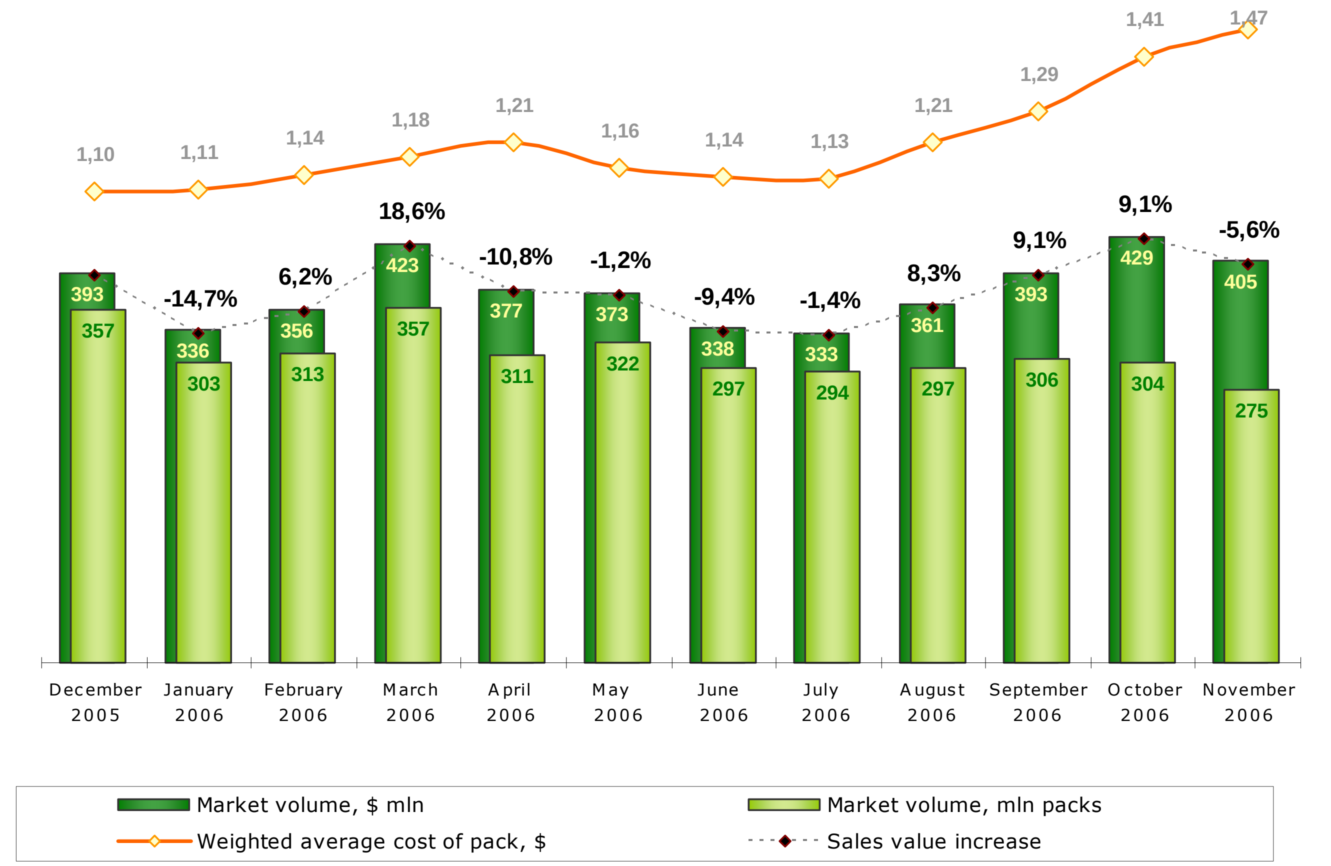
Commercial segment of the pharmaceutical market includes pharmacy sales of RTU drugs and parapharmaceutical products exclusive of sales under Beneficiary Drug Provision (BDP) program.

1. Commercial market volume of RTU drugs in Russia

Diagram 1 shows dynamics in Russian commercial market volume of RTU drugs in wholesale prices from December 2005 to November 2006.

Diagram 1

Dynamics of Russian pharmacy market volume in December 2005 – November 2006, $ mln, VAT included



Source: Retail Audit of Russian Pharmaceutical Market by DSM Group, QMS meets **ISO 9001:2000** requirements.

According to the DSM Group's retail audit data, we observed decrease of the commercial market in November 2006. Over this period, commercial market volume of RTU drugs decreased by 5.6% in November 2006 compared to October and amounted to 405 mln dollars (**in pharmacy purchase prices**, VAT included), In ruble terms the market decrease was more significant – over 6.4% (from 11.5 to 10.8 billion rubles). Lower sales volume is absolutely unusual for seasonal dynamics of pharmaceutical market (in 2005 there was growth by 3% in November compared to October). Probably the reason is anomalously warm weather during the period of usual start of catarrhal diseases.

For 11 months of 2006, the commercial market volume of RTU drugs **in pharmacy purchase prices** increased by 16.7% in dollars and by 12.5% in rubles compared to the year-ago period.

The weighted average **price per RTU drug package** on Russian commercial market in rubles has been growing during last 5 months, and in November 2006 it amounted to 39.22 rubles (1.47 dollars). The weighted average price growth in November 2006 compared to that in November 2005 was 21% in ruble terms and 31% in dollar terms.

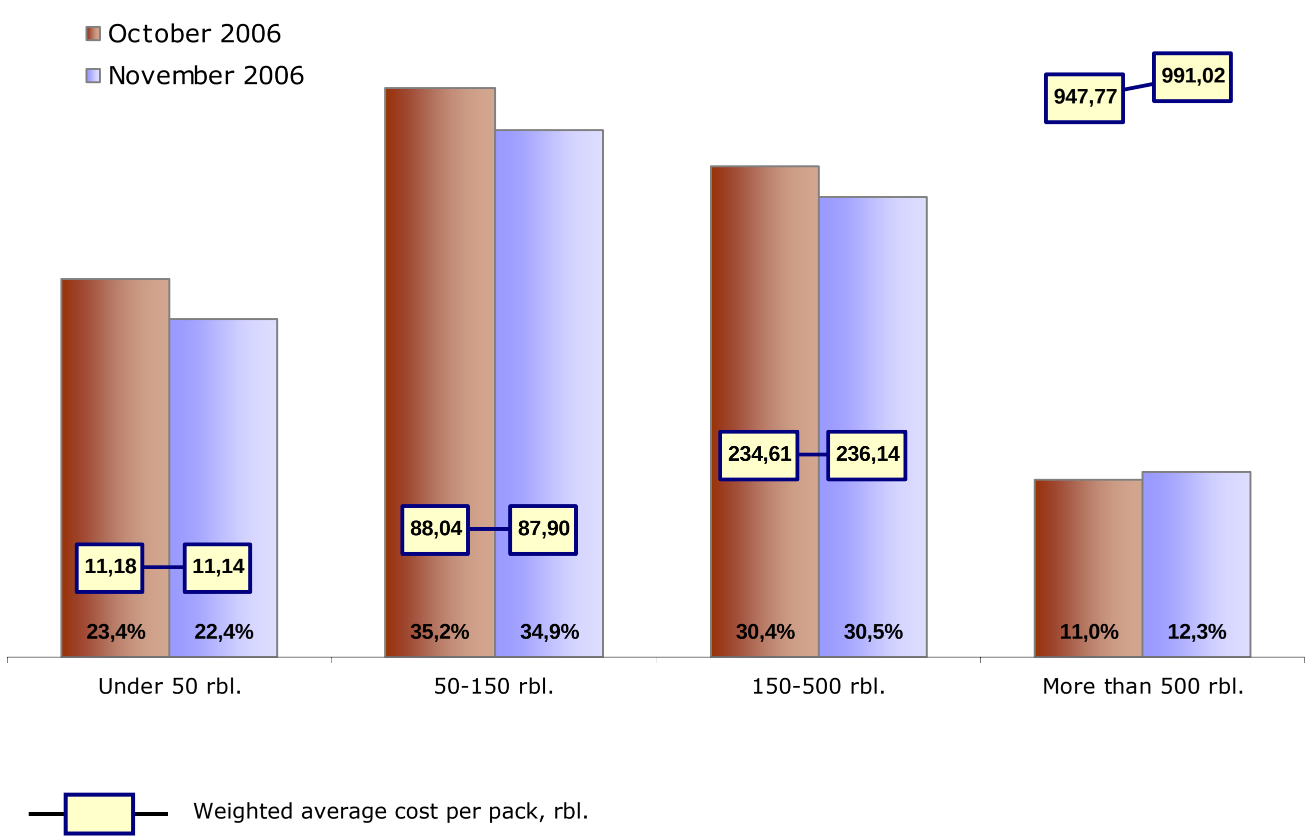
2. Structure of Russian commercial market

2.1. RTU drugs consumption structure for different price categories

Diagram 2 shows dynamics in drug consumption structure (in real terms) with regard to various price categories.

Diagram 2

Dynamics of consumption of drugs from different price categories in October-November 2006, %



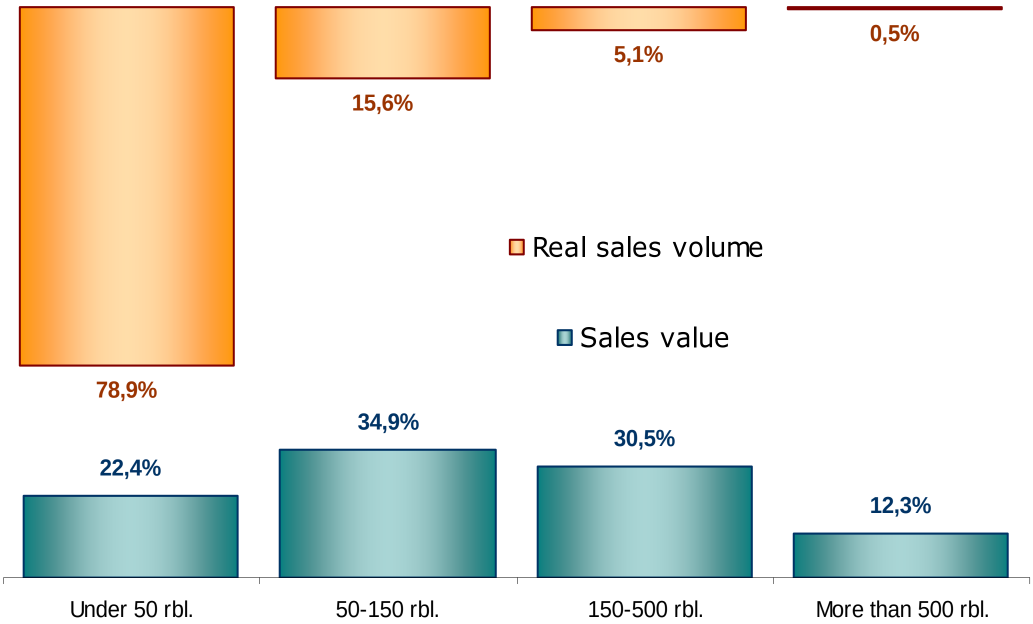
Source: Retail Audit of Russian Pharmaceutical Market by DSM Group, QMS meets **ISO 9001:2000** requirements.

As the *Diagram* shows change in consumption structure of drugs from different price categories does not pass synchronously. More over, cheapest drugs (priced under 50 rubles) sales decrease in November 2006 at maximum – by 10%, while expensive drugs increase by 4% in comparison to October. At that, average pack price in the segment of drugs priced under 500 rubles did not change, while within growing segment of expensive drugs there was increase in average pack price.

Diagram 3 shows dynamics of RTU drugs consumption structure for different price categories.

Diagram 3

Dynamics of consumption of drugs from different price categories (in value and in real terms) in November 2006, %



Source: Retail Audit of Russian Pharmaceutical Market by DSM Group, QMS meets the requirements of **ISO 9001:2000**

In real terms Russian market is highly concentrated on cheapest drugs segment, 78.9% of packs was priced under 50 rubles in November 2006.

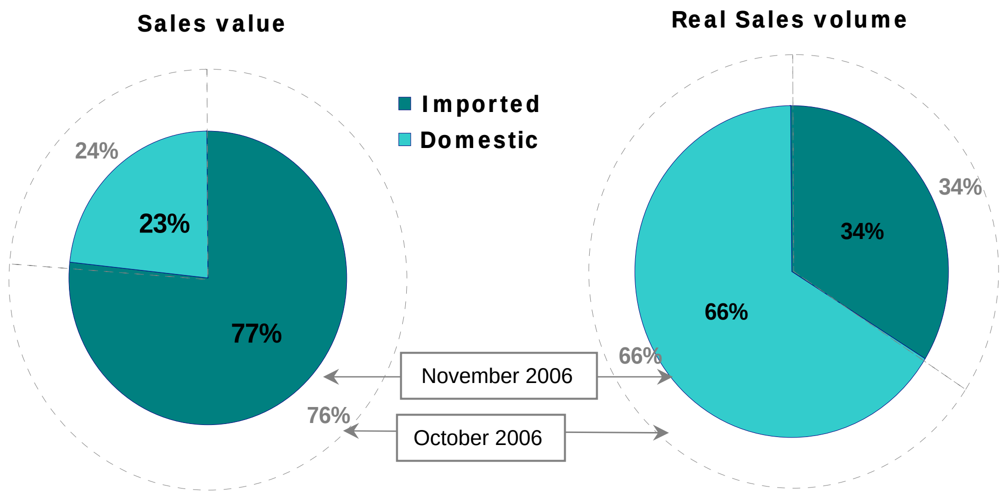
Drugs priced under 150 rubles covered more than 94% of real sales volume and slightly more than 57% of sales value, while the rest 43% was covered by expensive drugs (5.6% of real sales volume).

2.2. Proportion of imported and domestic drugs

The proportion of domestic and imported drugs by pharmacy sales in Russia is shown in *Diagram 4*.

Diagram 4

Shares of domestic and imported drugs on Russian pharmacy market n October-November 2006, %



Source: Retail Audit of Russian Pharmaceutical Market by DSM Group, QMS meets the requirements of **ISO 9001:2000**

The share of domestic drugs in value terms decreased in November 2006 by 1% in comparison to October 2006 and amounted to about 23% of the overall pharmacy sales volume. The share of domestic drugs in real terms did not change in November and amounted to 66%.

2.3. Drug sales structure by ATC groups

Proportion of 1-st level ATC groups by pharmacy sales in October-November 2006 in Russia is shown in *Table 1.*

Table 1

First level ATC groups ranking by share in pharmacy sales in October-November 2006, %

First level ATC groups	Share in sales value, %			Share in real sales volume, packs, %		
	October 2006	November 2006	Share change	October 2006	November 2006	Share change
A: Alimentary tract and metabolism	17,5%	18,6%	1,0%	18,4%	19,9%	1,5%
N: Nervous system drugs	13,6%	13,6%	-	20,1%	20,5%	0,4%
R: Respiratory system drugs	12,4%	11,5%	-0,9%	15,4%	14,1%	-1,3%
C: Cardiovascular system drugs	10,5%	11,3%	0,7%	7,3%	7,9%	0,6%
J: Antibacterials for systemic use	8,7%	8,0%	-0,8%	6,1%	5,6%	-0,5%
G: Genitourinary system drugs and sex hormones	7,5%	7,7%	0,2%	1,6%	1,6%	-
M: Musculoskeletal system drugs	6,2%	6,5%	0,3%	5,4%	5,4%	0,1%
[~] Without allocation (homeopathic preparations, plant and animal drugs, substances etc.)	5,9%	5,5%	-0,4%	9,0%	8,6%	-0,4%
L: Antineoplastic and immunomodulating agents	5,5%	5,1%	-0,4%	1,2%	1,1%	-0,2%
D: Dermatologicals	5,0%	4,9%	-0,1%	9,2%	8,9%	-0,4%
B: Agents affecting blood and blood forming organs	2,8%	3,0%	0,2%	2,1%	2,3%	0,2%
S: Agents affecting sensory organs	2,1%	2,2%	0,1%	2,0%	2,1%	0,1%
H: Systemic hormonal preparations (excluding sex hormones)	0,9%	1,0%	-	0,4%	0,4%	-
V: Various	0,8%	0,8%	-	1,2%	1,1%	-0,1%
P: Antiparasitic products, insecticides and repellents	0,5%	0,5%	-	0,6%	0,6%	-

Source: Retail Audit of Russian Pharmaceutical Market by DSM Group, QMS meets the requirements of **ISO 9001:2000**

In November 2006 there was increase in share of group [A] "Alimentary tract and metabolism" and group [C] "Cardiovascular system drugs". This effect means only stability and lack of seasonality in consumption of drugs from these groups.

At the same time there are groups with decreasing share in November 2006. The most decreased shares had the following groups:

First level ATC groups	Decrease in sales value November / October
R: Respiratory system drugs	-12,60%
J: Antibacterials for systemic use	-13,94%
[~] Without allocation	-11,34%
L: Antineoplastic and immunomodulating agents	-12,50%

This caused decrease of these groups in the whole pharmacy market. At that there is decrease for all leading drugs within groups [R] and [J], while for drugs without allocation decrease observed for homeopathic preparations used for flu prevention and treatment (Anaferon, Aflubin, Ocillocockcinum), and group [L] decreased due to immunomodulators Arbidol and Immunal.

3. Leaders among drug manufacturers

More than 800 drug manufacturers were represented on the Russian pharmacy market in November 2006.

TOP 10 manufacturers by sales volume are shown in *Table 2.*

Table 2

TOP 10 drug manufacturers by share in pharmacy sales in Russia in October-November 2006

Rating		Manufacturers	Share in sales value, $, %		Share in real sales volume, %	
October 2006	November 2006		October 2006	November 2006	October 2006	November 2006
1	1	Sanofi-Aventis	4,46	4,86	1,62	1,72
3	2	Berlin-Chemie /A.Menarini/	3,50	3,60	1,88	1,94
2	3	Pharmstandard	3,79	3,45	8,12	8,49
7	4	Gedeon Richter	2,65	2,75	1,09	1,16
6	5	Pfizer International inc.	2,76	2,69	0,49	0,48
4	6	Lek DD	2,83	2,67	1,24	1,22
5	7	Servier	2,79	2,62	0,51	0,49
9	8	Nycomed	2,56	2,61	0,87	0,86
8	9	Novartis Pharma	2,56	2,46	0,79	0,77
11	10	Glaxosmithklein	1,99	1,95	0,68	0,66
		Total share of TOP 10	**29,89**	**29,66**	**17,30**	**17,79**

Source: Retail Audit of Russian Pharmaceutical Market by DSM Group, QMS meets the requirements of **ISO 9001:2000**

Note. *Pharmacy sales volume of "Pharmstandard" company includes sales value of brands bought from "Masterlek" company (from July 2006).*

Sanofi-Aventis is the leader of Russian TOP 10 companies by sales value during the whole year, and Berlin-Chemie /A.Menarini/ is on the second place.

November did not change the rating of TOP manufacturers. The TOP-10 companies for 11 months of 2006 are:

Table 3

Rating for period January-November 2006	Manufacturer	Share in sales value, $, %
1	Sanofi-Aventis	4,50
2	Berlin-Chemie /A.Menarini/	3,65
3	Pharmstandard	3,03
4	Gedeon Richter	2,94
5	Pfizer International inc.	2,85
6	Servier	2,68
7	Novartis Pharma	2,58
8	Nycomed	2,57
9	Lek DD	2,47
10	KRKA	2,09

Source: Retail Audit of Russian Pharmaceutical Market by DSM Group, QMS meets the requirements of **ISO 9001:2000**

TOP 10 manufacturers cover almost 29% of drugs sales value in Russia.

There is only one Russian company among leaders – Pharmstandard. It stayed at the 3-rd position by the end of 2006.

4. Top sales products

TOP 20 drug brands by pharmacy sales volume in Russia in October-November 2006 are shown in *Table 4.*

Table 4

TOP 20 drug trade names by sales volume in Russia (in value terms) in October-November 2006

Rating		Brand	Share in sales value, $, %	
October 2006	October 2006		October 2006	November 2006
1	1	Arbidol	1,36	0,97
5	2	Essentiale	0,74	0,88
3	3	Viagra	0,89	0,84
4	4	Actovegin	0,76	0,83
6	5	Vitrum	0,73	0,71
9	6	Enap	0,60	0,69
2	7	Teraflu	0,92	0,69
13	8	No-Spa	0,55	0,65
12	9	Mezym Forte	0,56	0,62
7	10	Crataegus	0,68	0,58
16	11	Mexidol	0,51	0,56
10	12	Linex	0,58	0,56
17	13	Preductal	0,51	0,55
20	14	Pentalgin	0,47	0,52
11	15	Coldrex	0,56	0,52
8	16	Anaferon	0,66	0,51
15	17	Viferon	0,52	0,50
28	18	Xenical	0,44	0,50
18	19	Lazolvan	0,50	0,49
23	20	Multi-Tabs	0,45	0,49
		Total share of TOP20	**-**	**12,63**

Source: Retail Audit of Russian Pharmaceutical Market by DSM Group, QMS meets the requirements of **ISO 9001:2000**

Note 1. *A number of trade names from Cliphar-Gosreestr are grouped according to the principle of product lines (Coldrex, Vitrum, Fervex, No-spa, Teraflu, Cavinton, Multitabs, Pentalgin, Complivit, Preductal, Viferon).*

Note 2. *Whereas TOP 20 trade names list changes every month, the cumulative share of TOP 20 trade names for past months could not be indicated in this Table. Only ranking positions and shares of each trade name presented in the reported month are shown for previous months.*

Arbidol is still the leader of TOP-20 brands by pharmacy sales value in Russia for November 2006 in spite of its decreased share (from 1.36% to 0.97%), Essentiale (0.88%) is on the second place and Viagra (0.84%) is on the third place.

5. Price index

Laspeyres index was used for the analysis of drug price dynamics from the beginning of 2006.

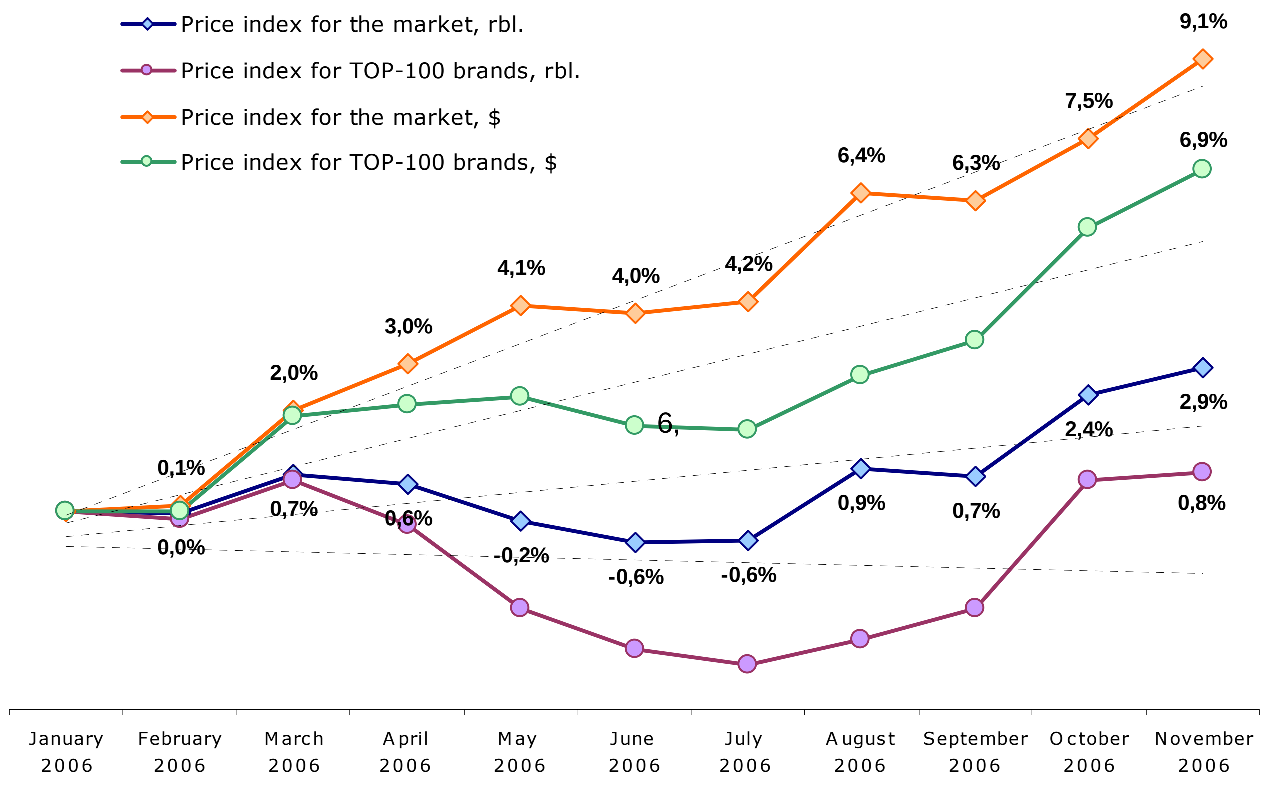
Laspeyres index is the ratio of two value aggregates of base-period quantities at current and base-period prices, where real sales volumes of basket of goods in the base period are used as weights. Ratio of drugs sales in 2005 was taken as a basket of goods. Using this method, seasonal influence on consumption grades, so we see price changes for the period of January-November 2006.

Price index was calculated on the basis of **all drug trade names listed in the DSM Group database over 2006**. January 2006 was used as a base period.

Diagram 5 shows dynamics in RTU drug prices according to Laspeyres index over the period from January to November 2006.

Diagram 5

Dynamics of drugs prices on commercial market in January-November 2006, %



Source: Retail Audit of Russian Pharmaceutical Market by DSM Group, QMS meets the requirements of **ISO 9001:2000**

According to Laspeyres index, in November 2006 drug prices almost did not increase (+0.5% in rubles, +1.5% in dollars) compared to October. If for dynamics from the beginning of the year, we see insignificant price growth in rubles for the whole RTU drugs market (2.9% in November), at that 9%-growth in dollars was due to exchange rate fall down.

6. Import

Drug import volume in Russia in October 2006 amounted to 513 mln dollars (in customs prices[1]), which is 8.4% higher than that in September 2006 and 49% higher than that in October 2005.

Table 5 shows 10 months dynamicsof the shares for different groups of drug importers in Russia by import value.

Table 5

Shares in import value of different groups of drug importers in Russia for 10 months of 2006

Rating	Importers	Shares by import volume, %				
		July 2006	August 2006	September 2006	October 2006	Cumulative for 10 months
1.	Distributor companies	44,24	45,25	44,60	46,24	**44,35**
2.	Representatives of foreign companies	44,12	43,24	45,29	43,17	**42,67**
3.	Direct import companies	11,08	10,44	9,42	10,00	**11,44**
4.	Domestic drug manufacturers	0,56	1,08	0,70	0,59	**1,54**
	Total:	100	100	100	100	**100**
	Import volume, thousands $	**464 767**	**505 988**	**472 829**	**512 513**	**4 974 367**

Source: Diamond Vision, DSM Group

As can be seen from the *Table*, in October 2006 almost 90% of the total drug import is covered by two groups of importers – distributor companies and representatives of foreign companies.

[1] Customs price does not include customs tax (mainly 10%), VAT (10%) and specific tax (0.15%).

Table 6 shows top 20 distributors by drug import volume in Russia for 10 months of 2006.

Table 6

TOP 20 distributors by drug import volume in Russia for 10 months of 2006

Rating	Distributors	Shares by import volume of the group "Distributor companies" July 2006	August 2006	September 2006	October 2006	Cumulative for 10 months
1	CV "Protek"	27,34	26,02	24,36	23,40	**26,54**
2	SIA International	19,92	21,47	24,36	27,70	**23,64**
3	Rosta	4,09	7,35	4,79	5,40	**5,77**
4	Biotek	3,06	5,43	3,26	2,82	**5,11**
5	Genezis	7,09	4,11	5,80	5,35	**3,97**
6	Katren	5,01	3,84	6,13	4,21	**3,69**
7	Moron	4,12	3,81	5,44	2,57	**3,05**
8	Apteka-Holding	3,34	1,25	1,13	2,60	**2,92**
9	Apteka-Holding	2,20	2,75	2,63	3,16	**2,84**
10	R-Farm	1,72	3,05	2,34	1,32	**2,18**
11	Shreya Corp.	2,31	1,76	2,43	1,88	**2,11**
12	Fortuna Plus	2,93	0,64	1,90	2,00	**1,77**
13	Farmacevt	2,11	3,71	0,26	2,26	**1,60**
14	Farmstor	2,15	1,95	1,07	1,99	**1,44**
15	Интермедсервис	1,49	1,55	0,94	1,18	**1,33**
16	Евросервис	0,86	1,29	1,18	1,74	**1,21**
17	National Distributor Company	0,89	0,66	1,56	0,88	**0,91**
18	Krona	1,25	0,00	1,83	1,47	**0,82**
19	FK Puls	0,86	0,83	1,42	0,79	**0,73**
20	Farmlain	0,60	1,86	0,45	1,39	**0,65**
	Import volume of all distributors, $ thousands	**251 404**	**289 139**	**210 882**	**236 986**	**2 206 136**

Source: Diamond Vision, DSM Group

As is shown in this *Table*, CV "Protek" and SIA International remain the largest distributors by import volume in the group "Distributor companies". The other distributors fall behind significantly in ranking.

The share of 20 largest distributors-importers in total import volume of the "Distributor companies" group amounted more than 94% in October 2006.

TOP-3 leaders for 10 month of 2006 in the group "Distributor companies" are the following:

Rating	Distributors	Shares by import volume of the group "Distributor companies" for 10 months of 2006, %
1	CV "Protek"	26,54
2	SIA International	23,64
3	Rosta	5,77

Table 7 shows TOP 20 drug manufacturers by drug import volume in the Russian Federation with regard to all groups of importers in August-October 2006.

Table 7

TOP 20 drug manufacturers by drug import volume in Russian Federation with regard to all groups of importers in August-October 2006

Rating			Manufacturers	Shares by import value, $		
August 2006	September 2006	October 2006		August 2006	September 2006	October 2006
3	7	1	SOLVAY PHARMACEUTICALS B.V.	5,0%	3,2%	5,9%
1	1	2	SANOFI-AVENTIS	5,6%	6,9%	4,2%
5	10	3	NOVARTIS	4,0%	2,6%	4,1%
7	3	4	SERVIER	3,7%	5,0%	3,8%
2	8	5	NOVO NORDISK	5,0%	3,0%	3,8%
6	21	6	F.HOFFMANN-LA ROCHE LTD	4,0%	1,4%	3,3%
4	5	7	A.MENARINI	4,8%	3,6%	3,0%
16	6	8	JANSSEN PHARMACEUTICA N.V.	2,2%	3,4%	2,9%
19	4	9	GLAXOSMITHKLINE	1,7%	5,0%	2,8%
24	24	10	ABBOTT GMBH & CO.KG	1,5%	1,1%	2,7%
13	20	11	BOEHRINGER INGELHEIM	2,5%	1,5%	2,6%
18	16	12	LEK D.D.	1,7%	2,1%	2,6%
206	28	13	RICHARD BITTNER AG	0,0%	1,0%	2,5%
12	12	14	KRKA	2,5%	2,5%	2,5%
8	2	15	SCHERING AG	3,6%	5,6%	2,5%
14	14	16	NYCOMED	2,3%	2,2%	2,4%
31	35	17	TEVA PHARMACEUTICAL	0,9%	0,8%	2,3%
11	13	18	ASTRAZENECA UK LTD	2,6%	2,2%	2,1%
23	11	19	RATIOPHARM INTERNATIONAL	1,5%	2,6%	2,1%
10	15	20	GEDEON RICHTER	2,9%	2,1%	1,9%
			Total:	**-**	**-**	**60.0%**

Source: Diamond Vision, DSM Group

Note. *Whereas TOP 20 drug manufacturers list changes every month, the cumulative share of TOP 20 members for past months could not be indicated in this Table. Only ranking positions and shares of each manufacturer presented in the reported month are shown for previous months.*

As is shown in the *Table*, SOLVAY, SANOFI-AVENTIS and NOVARTIS are the largest manufacturers by drug import volume in the Russian Federation.

The increased position of RICHARD BITTNER company is significant.

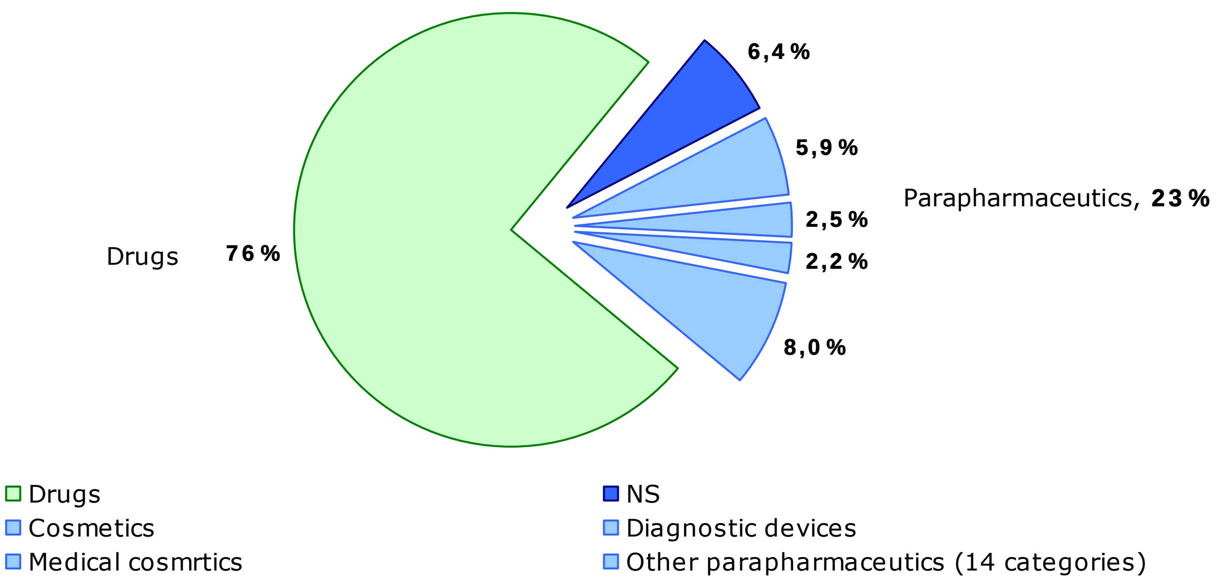
The share of TOP 20 drug manufacturers by import volume in Russia in October 2006 amounted to 60%.

7. Nutritional Supplements

Nutritional Supplements (NS) rank next to drugs and occupy the second place in the structure of pharmacy sales.

Diagram 6

Russian commercial pharmacy market for 11 months of 2006



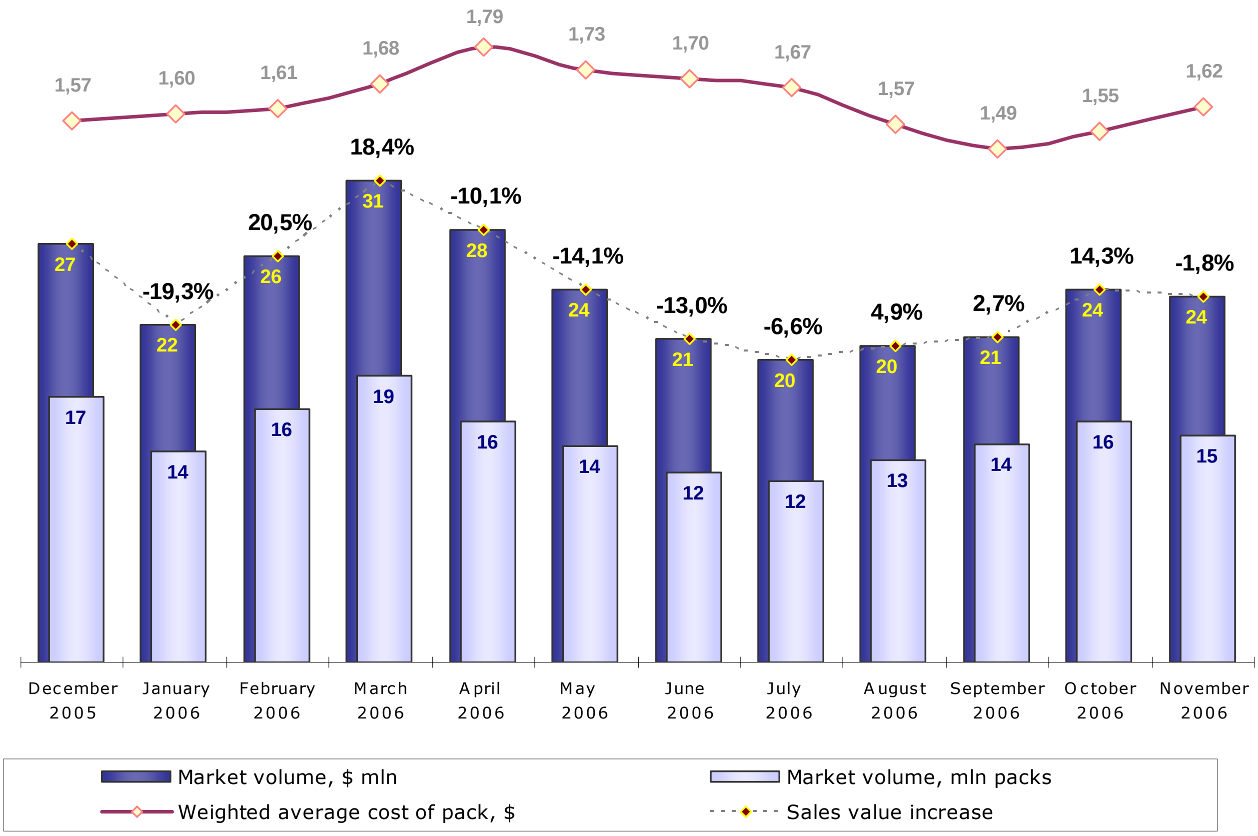
Source: Retail Audit of Russian Pharmaceutical Market by DSM Group, QMS meets the requirements of **ISO 9001:2000**

NS now have the largest share of parapharmaceutics. Today, more than 4000 trade names of NS represented by approximately 700 manufacturers are being sold in Russian pharmacies.

Diagram 7 shows the dynamics of Russian commercial NS market from December 2005 to November 2006.

Diagram 7

Russian commercial NS market in December 2005 - November 2006



Source: Retail Audit of Russian Pharmaceutical Market by DSM Group, QMS meets the requirements of **ISO 9001:2000**

In November 2006 Russian NS pharmacy market volume decreased by 1.8% compared to October 2006 and amounted to 23.6 mln dollars. During 11 months of 2006, Russian NS pharmacy market volume increased by 16.4% in value terms compared to that in 2005. NS pharmacy market volume in real terms increased in November 2006 by 6% from October and amounted to 14.6 mln packages.

The weighted average cost per NS package in the pharmacy segment of Russia increased in November from October 2006 by 5% in dollars and amounted to 1.62 dollars (43 rubles). The weighted average cost per unit has no growing dynamics (as we see on drugs market), it costed 6% less in November 2006 compared to November 2005.

Table 8 shows NS manufacturers with largest pharmacy sales volume in Russia in October-November 2006.

Table 8

TOP 10 NS manufacturers by sales volume in Russia in October-November 2006

Rating		Manufacturers	Sales value, $, %		Real sales volume, $, %	
October 2006	November 2006		October 2006	November 2006	October 2006	November 2006
1	1	Evalar	12,24	13,69	8,04	9,19
2	2	Diod	11,38	10,77	6,59	6,93
3	3	Akva-MDT/Akvion	5,68	6,03	2,64	2,81
5	4	Nycomed	4,28	4,56	1,07	1,17
4	5	Natur Produkt	4,62	3,81	6,12	5,46
6	6	Ekomir	3,43	3,59	1,11	1,17
7	7	Ferrosan AG	2,82	3,08	0,46	0,54
9	8	M Mertsana (manufactured by "Kurortmedservis")	2,77	2,51	1,97	1,80
8	9	Pharma-med Inc	2,77	2,49	0,30	0,31
10	10	Peking Jedemen Tea sales Centre	2,49	2,49	0,28	0,27
		Total:	**52,47**	**53,02**	**28,57**	**29,66**

Source: Retail Audit of Russian Pharmaceutical Market by DSM Group, QMS meets the requirements of **ISO 9001:2000**

TOP-10 NS manufactured did not change in November 2006. The leading manufacturers are Diod and Evalar, their cumulative share amounted in November 2006 almost to quarter of the market. However the lag between their shares increased.

Natur Produkt had maximum decrease in its share, – 19% from October 2006.

Table 9 shows TOP-20 NS brands by pharmacy sales volume in Russia.

Table 9

TOP 20 NS trade names by sales volume in Russia (in value terms) in October-November 2006

Rating		Brands	Shares by sales value, $, %	
October 2006	November 2006		October 2006	November 2006
1	1	Capilar	5,98	4,99
2	2	Bilberry-Forte	2,83	3,43
3	3	AlphaVIT	2,52	2,44
4	4	Lutein Complex	2,12	2,37
5	5	Zhedemen Slimming	1,89	1,96
8	6	Gerimax Energy	1,73	1,72
7	7	Viardo	1,79	1,58
6	8	Green Doctor Sage	1,87	1,52
29	9	Gepatrin	0,66	1,40
11	10	Lactofiltrum	1,19	1,26
12	11	Sealex	1,15	1,18
13	12	Calcium-Active	0,91	1,16
18	13	Kudesan	0,80	1,11
9	14	Turboslim-Day	1,30	1,11
10	15	Turboslim-Night	1,23	1,00
23	16	Okulist	0,72	0,85
16	17	Ateroklefit	0,83	0,85
15	18	Multi-Tabs Kid Ca+	0,83	0,84
31	19	Srlen Active	0,63	0,83
21	20	Vuka-Vuka	0,73	0,81
		Total share of TOP20:	**-**	**32,41**

Source: Retail Audit of Russian Pharmaceutical Market by DSM Group, QMS meets the requirements of **ISO 9001:2000**

Note. *Whereas TOP 20 NS trade names list changes every month, the cumulative share of TOP 20 members for past months could not be indicated in this Table. Only ranking positions and shares of each trade name presented in the reported month are shown for previous months.*

In November 2006, TOP-5 of NS brands did not change, the leaders are Capilar, Bilberry-Forte and AlphaVIT.

About DSM Group

To provide comprehensive, high quality and timely marketing research and full advertising support to the companies on the Russian pharmaceutical market

The marketing agency DSM Group has been on the market since 1999. Two key service fields of the company are marketing research and advertising on the Russian pharmaceutical market.

RESEARCH

QMS meets ISO 9001:2000 requirements

- Monthly retail audits of the Russian pharmaceutical market, which you can see in 25 working days
- Hospitals audits
- BDP database
- Drugs and substances import database
- Multifactor analysis of competitors environment
- Monitoring and analysis of drug sales by distributors
- Monthly analysis of market capacity, tendencies and forecasts
- Ad-hoc research

ADVERTISING

- Design and corporate identity creation
- Souvenirs for pharmaceutical sphere
- Printing (QMS meets ISO 9001:2000 requirements)
- Promo actions and events (from 20 up to 1500 persons)
- Media buying
- Outdoor advertising
- Corporate video
- Direct-mail through Russian pharmacies database
- Marketing plans

There are about 60 specialists in pharmaceutics, marketing and advertising in the staff. Our experts' opinion is highly rated by pharmaceutical and business public.

With us you will use your company's potential more effectively, so reinforce and develop your business.

We are always glad to see you in our office:
7/2, 5-th Yamskogo Polya St., Moscow, Russia
Tel: +7 495 780-72-64
Fax: +7 495 780-72-65
E-mail: info@dsm.ru
http://www.dsm.ru