



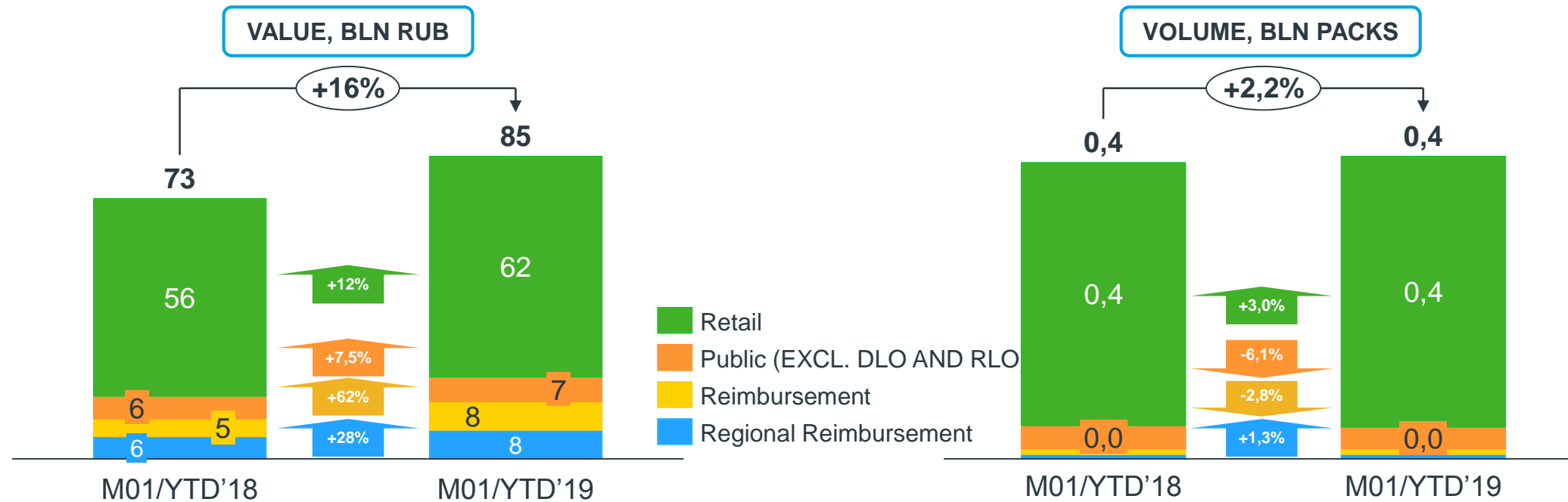
Facts from IQVIA

M01 2019



Russia pharma market growth in January 2019

Market grew by 16% in value and by 2,2% in volume

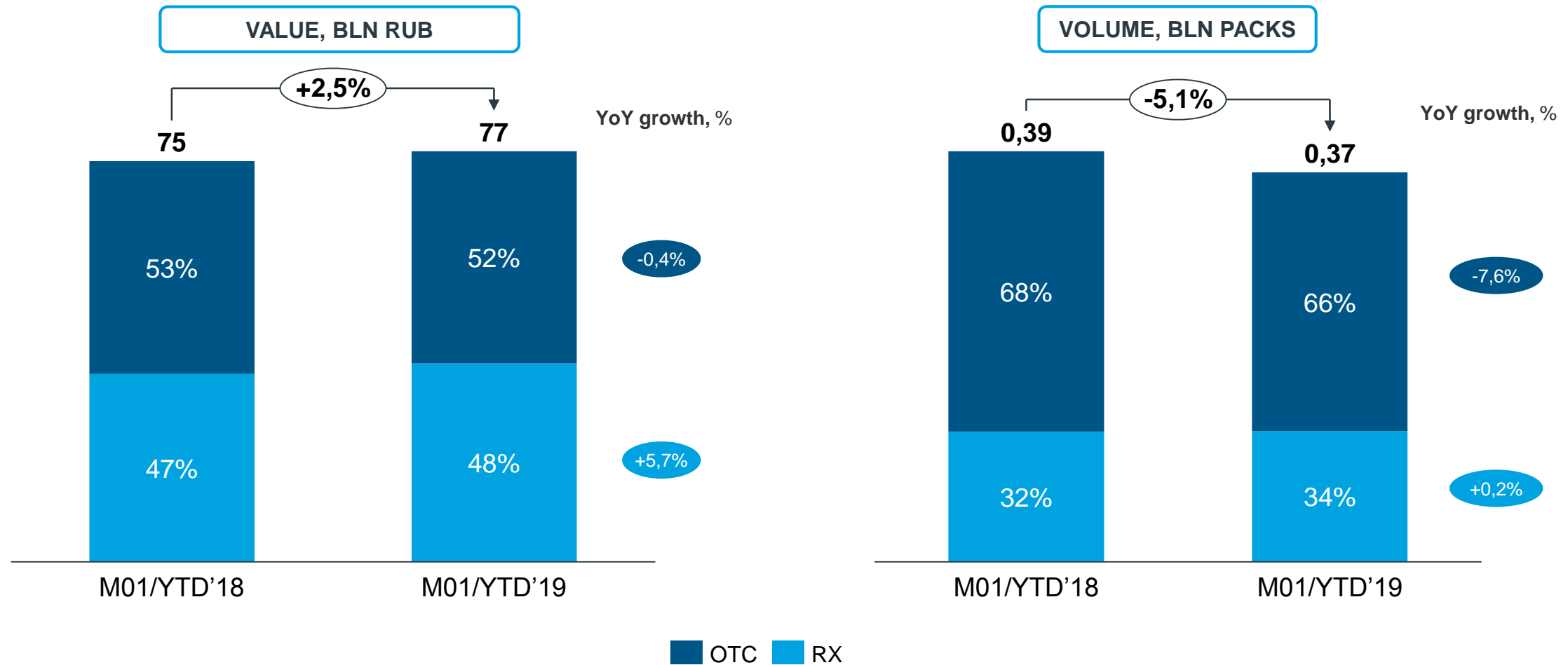


Indicator	RUB	USD	EUR	PACKS
Value M01/YTD'19, Bln.	85	1,3	1,1	0,4
Growth M01/YTD'19%	▲ 16%	▼ -1,9%	▲ 4,3%	▲ 2,2%



Russia pharma market growth in January 2019

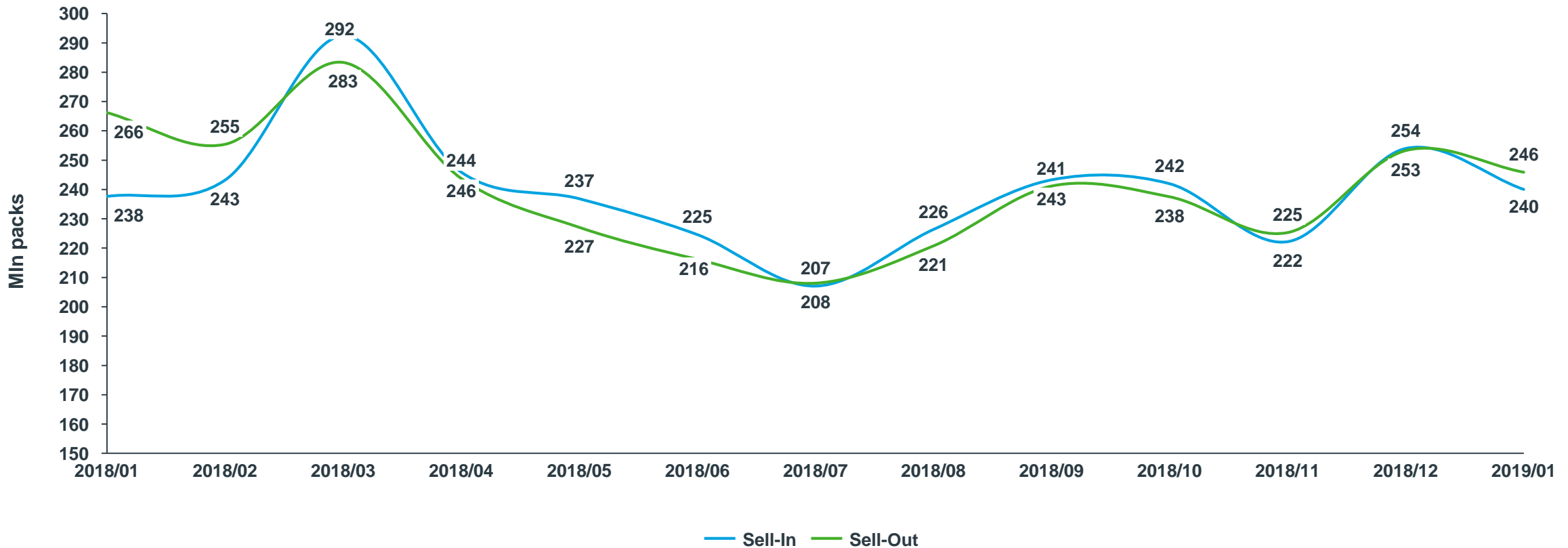
Retail Sell-Out: Market grew by 2,5% in value and decreased by 5,1% in volume





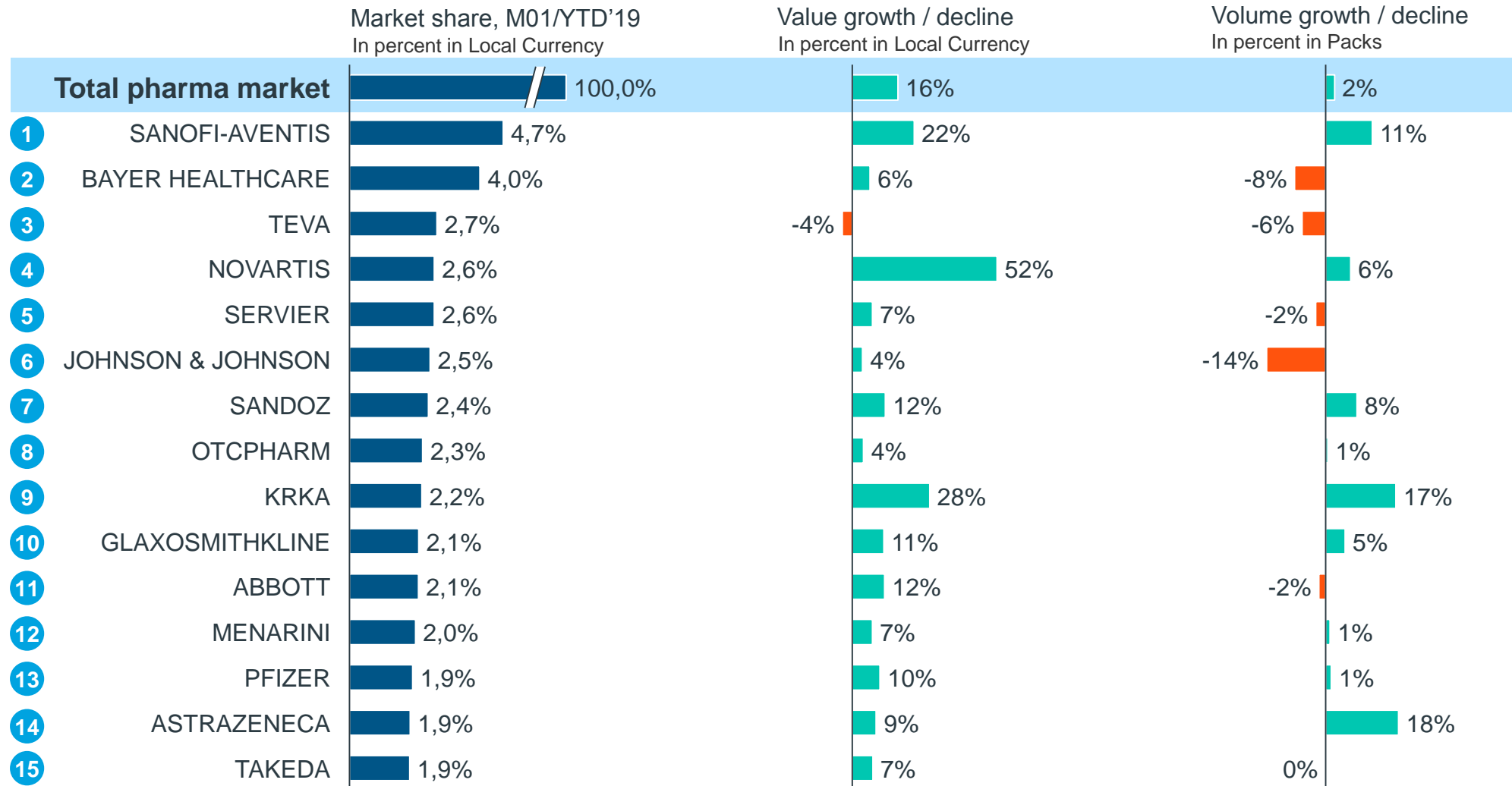
Sell-In vs Sell-Out, OTC registered drugs

Volume, mln packs



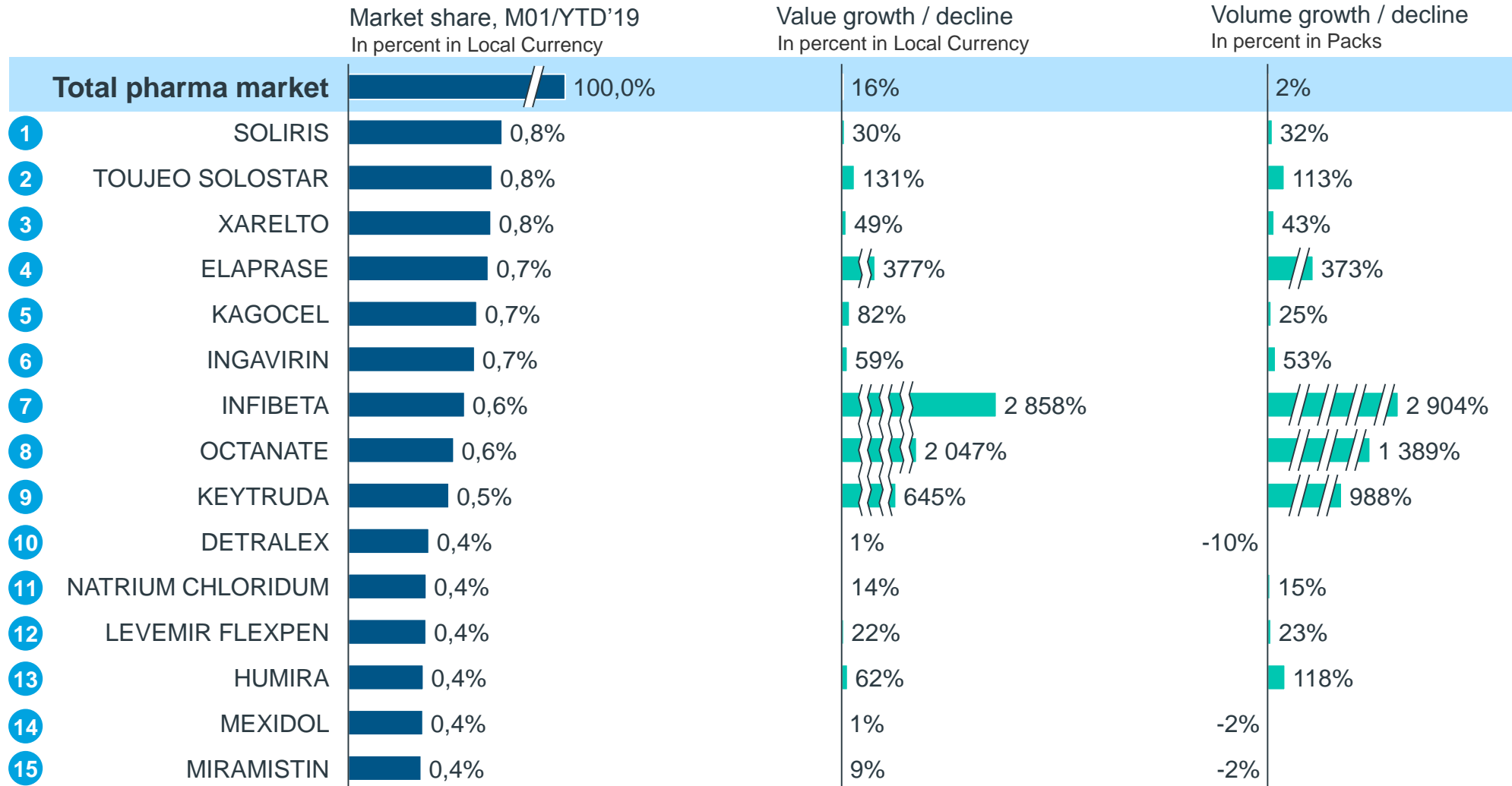


TOP-15 corporations on Russian market, January 2019

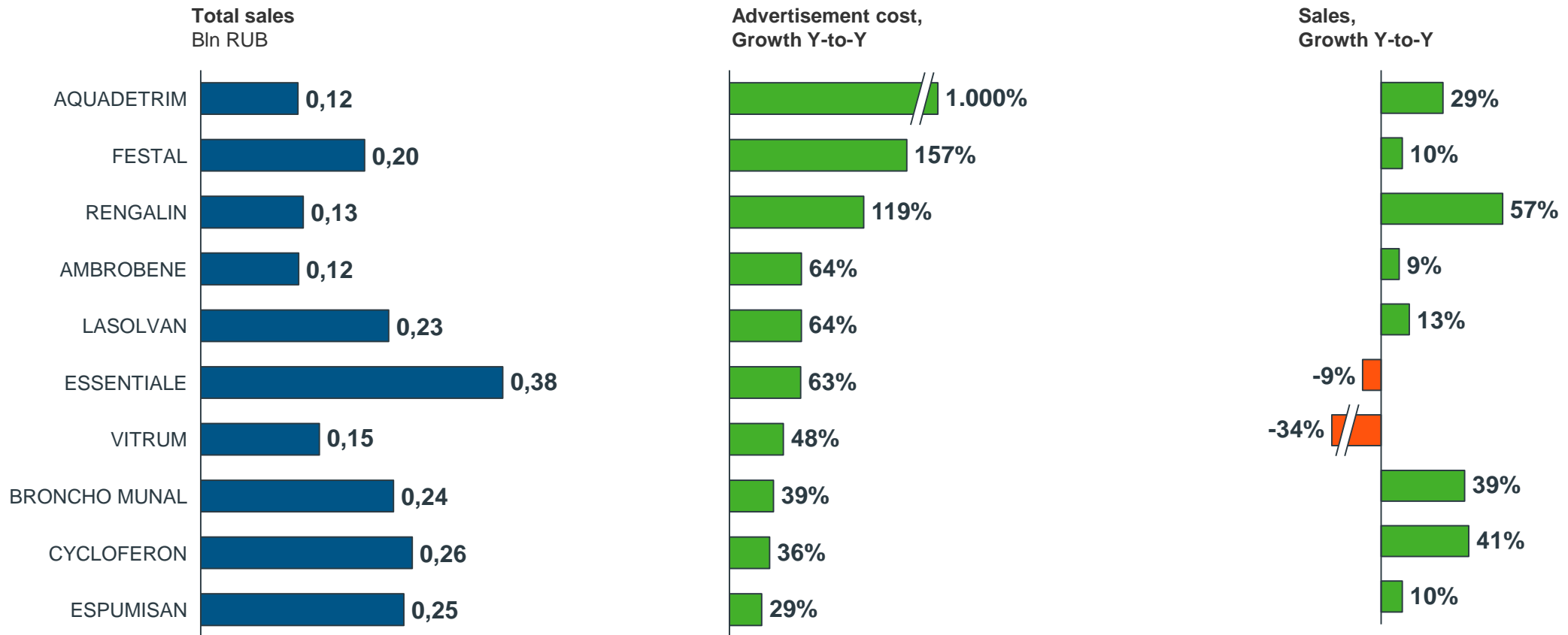




TOP-15 brands on Russian market, January 2019

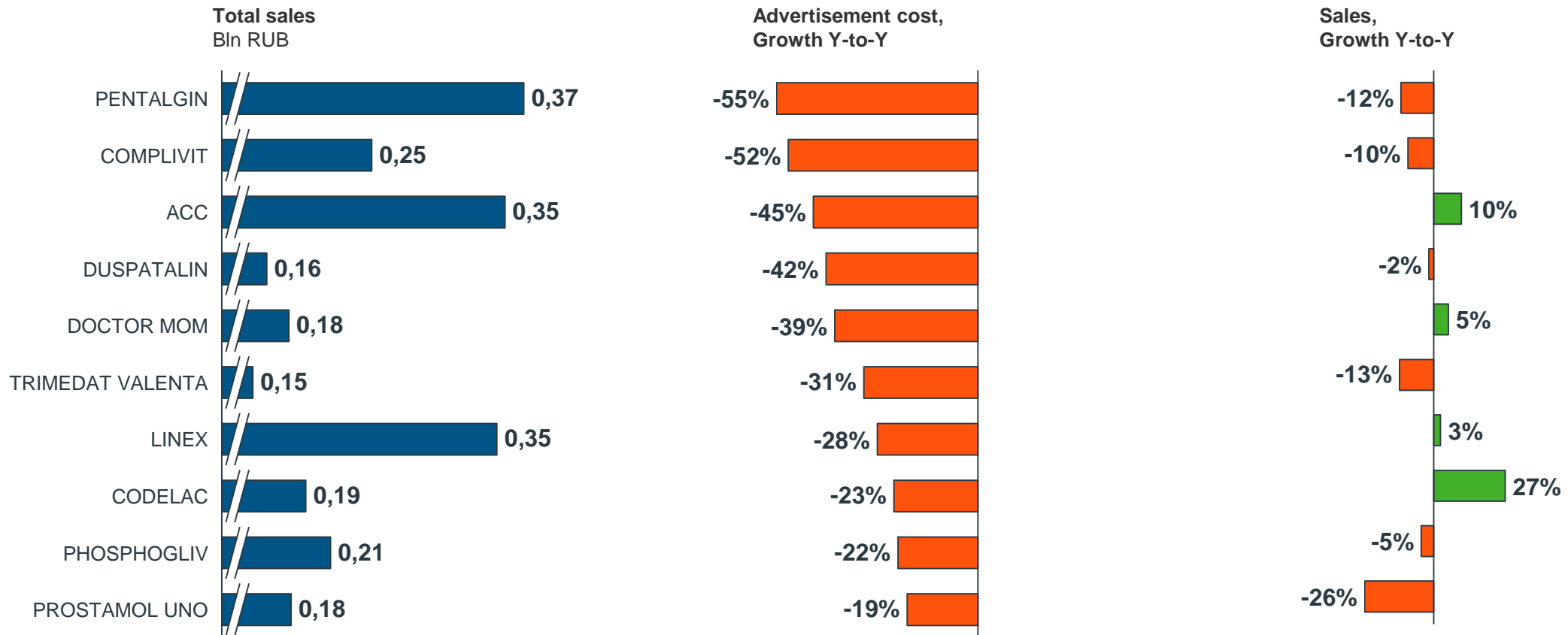


TOP-10 products by growth in advertisement investments in January 2019



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 2019

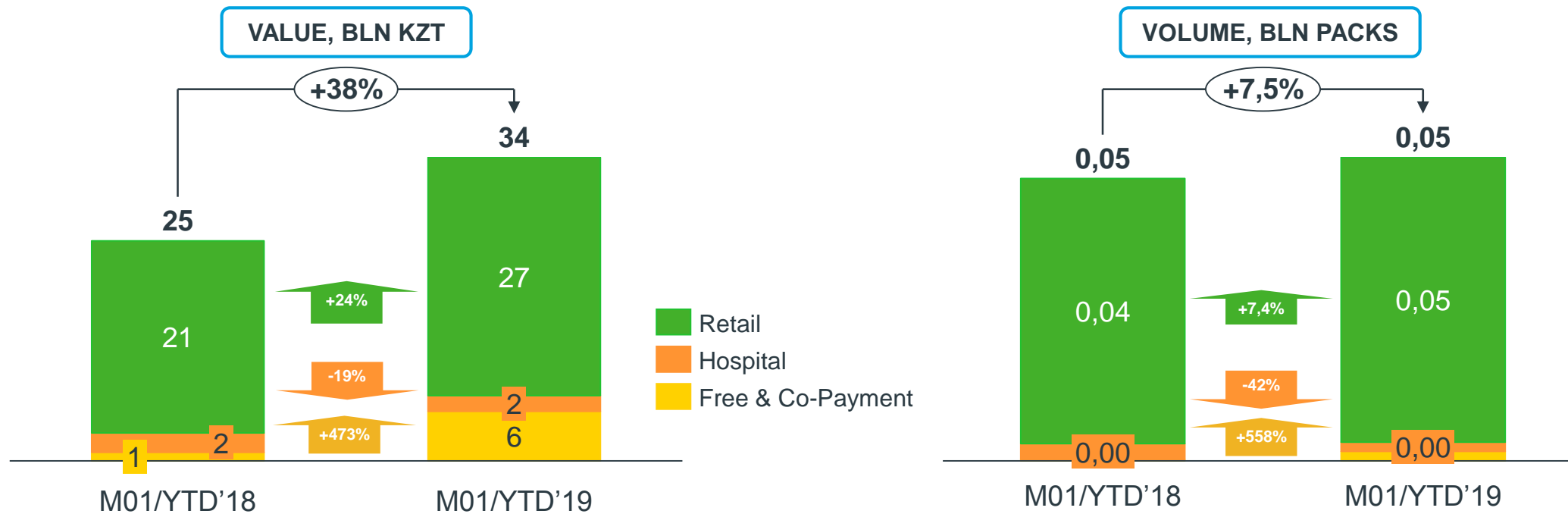


The rank is calculated among TOP-200 Brands by sales with advertising cost greater than 50 mln RUB
 Source: IQVIA databases. Pharmatrend, Mediascope data, FIN Prices



Kazakhstan pharma market growth in January 2019

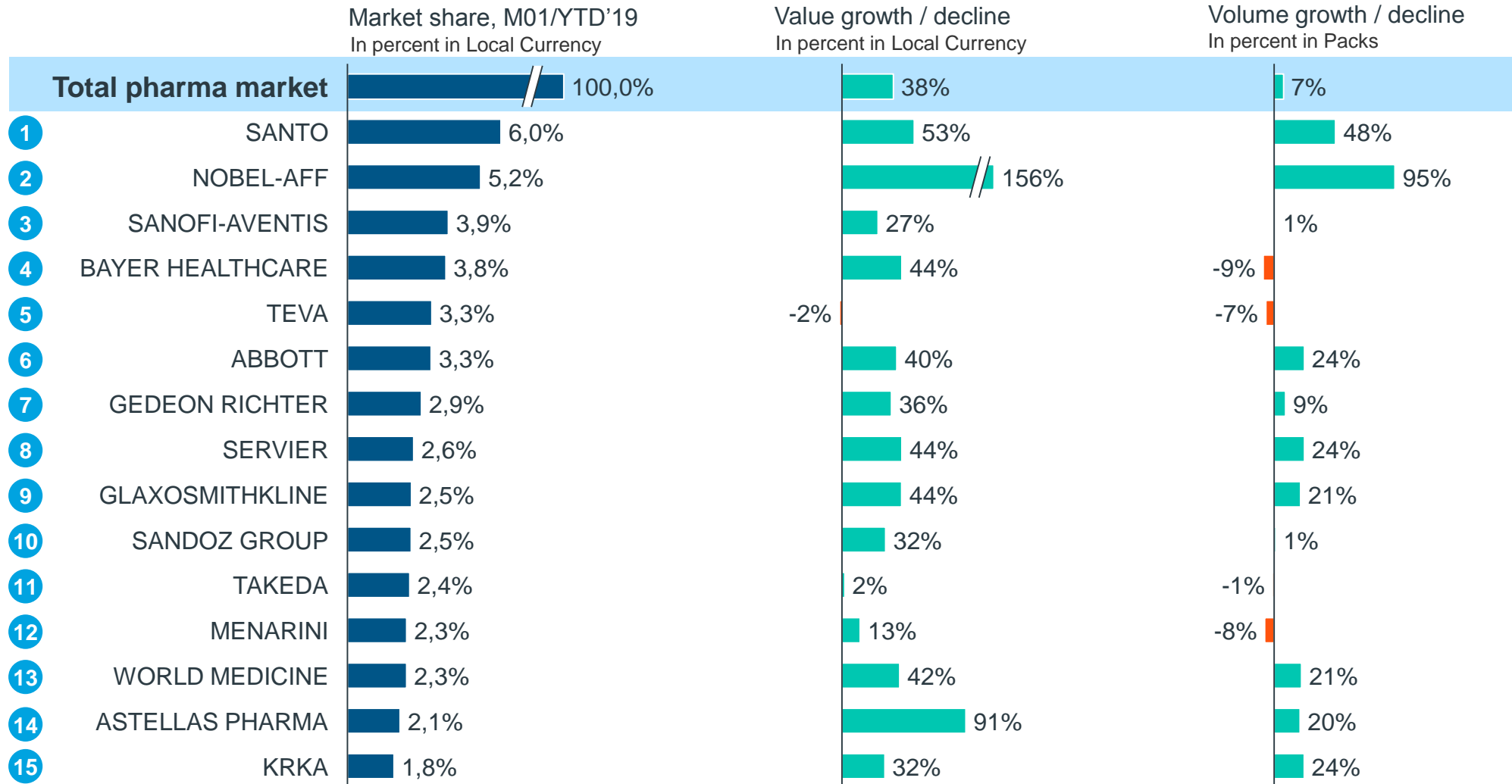
Market grew by 38% in value and by 7,5% in volume



Indicator	KZT	USD	EUR	PACKS
Value M01/YTD'19, Bln.	34	0,09	0,08	0,05
Growth M01/YTD'19%	▲ 38%	▲ 19%	▲ 27%	▲ 7,5%



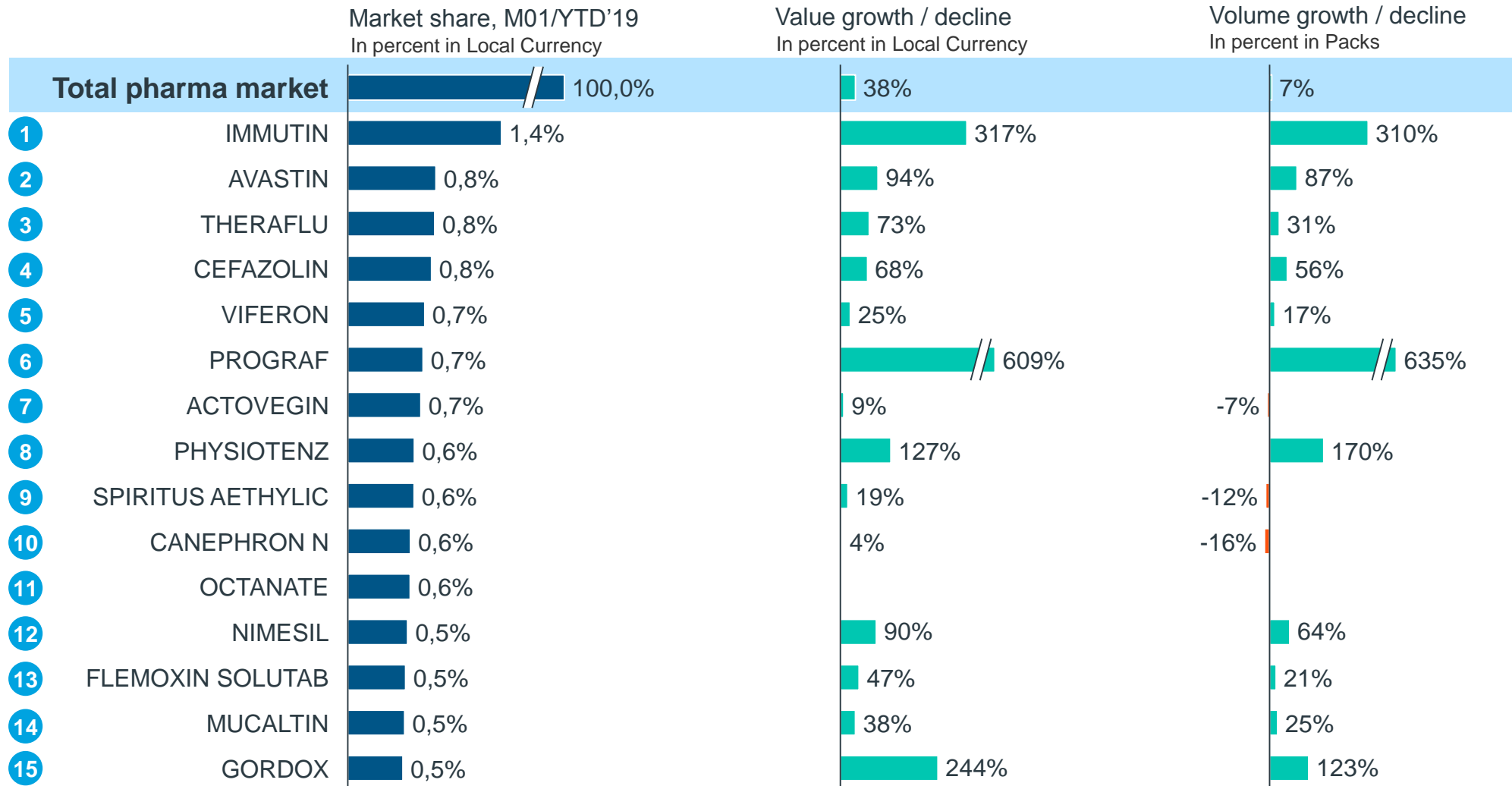
TOP-15 corporations on Kazakhstan market, January 2019



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



TOP-15 brands on Kazakhstan market, January 2019



E-Detailing and multichannel communications

IQVIA can make remote engagement more impactful and HCPs centric by using expertise, data, analytics, technologies



- ✓ Precision targeting, engagement
- ✓ Recruitment, & training of talented teams
- ✓ Appropriate content
- ✓ Technology enabled incentivization, coaching
- ✓ Integrated reporting
- ✓ Impact measurement

Virtual & Hybrid Interactions – the best opportunity to shape behaviour, enable digital engagement, optimise HCP experience.

Key benefits perceived by HCPs are related to virtual e-detailing flexibility and quality of delivered content

Based on IQVIA internal study (2019)



IQVIA can make remote engagement more impactful and HCPs centric by using expertise, data, analytics, technologies



Multi-Channel communication case

Challenge

- ✓ IQVIA was selected to support a major Big pharma exploring the effectiveness of alternatives sales channels.
- ✓ Benefits for Client included:
 - innovation - wanted to lead Multi-channel promotion in Russia
 - growing competition in F2F promotion
 - mitigate legislative risks imposed on F2F visits in the state HC sector
 - enhance reach
- ✓ Delivery challenges include:
 - internet access
 - IT skills of HCPs
 - prior written consent of HCPs required for call
 - different time zones
 - different experience from F2F for both HCP and Rep

Solution

- ✓ Pilot program to reach 1,520 HCPs in 6 cities
- ✓ To deliver 7,600 remote eDetail calls in first 5 months
- ✓ Detailing in 5 therapeutic areas / brands: Pulmonology, ENT, Urology, Allergy, Paediatrics (stakeholders)
- ✓ IQVIA to provide eReps, Call Agents, eDetailing Platform, CRM and hotline support

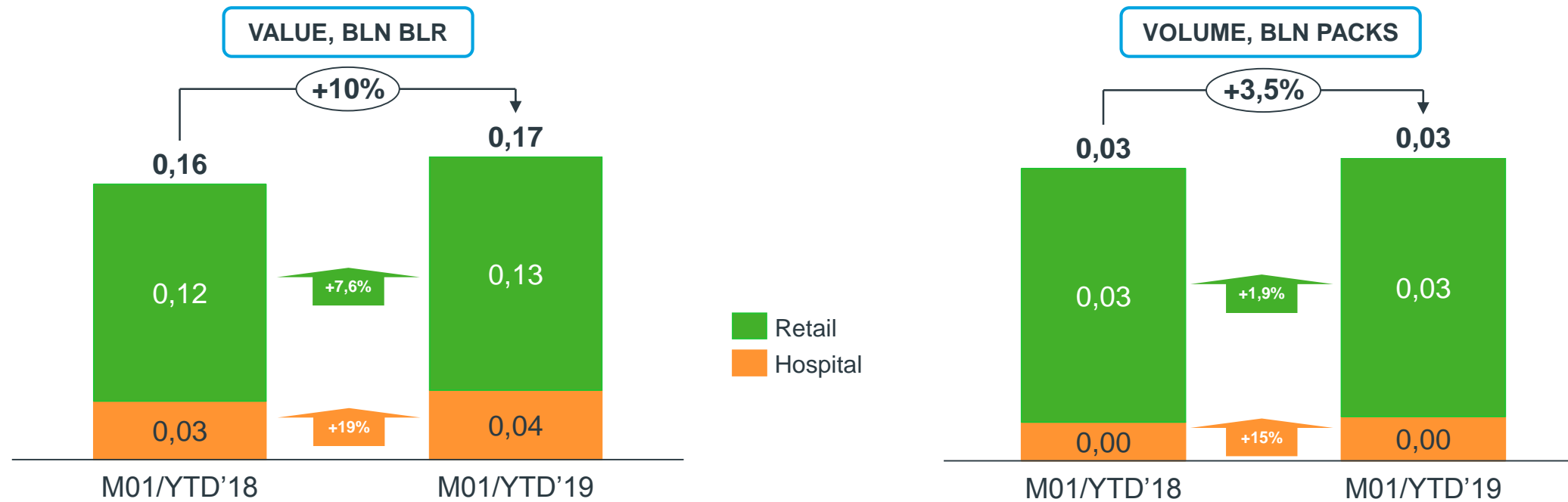
Outcomes

- ✓ Highly successful pilot project extended to full Y-R
 - Delivered 9,916 product eDetails
 - Activity evolved to 11-15 calls per day
 - Average acceptance rate of HCPs of remote call 87 (30% higher than expected)
 - Average call duration 21.5 mins
 - Average call review score (“satisfaction”) is 83% vs target of 75%
 - 99% of HCPs willing to have a subsequent calls
- ✓ Above measures expected to result in strong sales impact
- ✓ Project KPIs - ‘Exceeded’ 8/10 KPIs; ‘Met’ 2/10



Belarus pharma market growth in January 2019

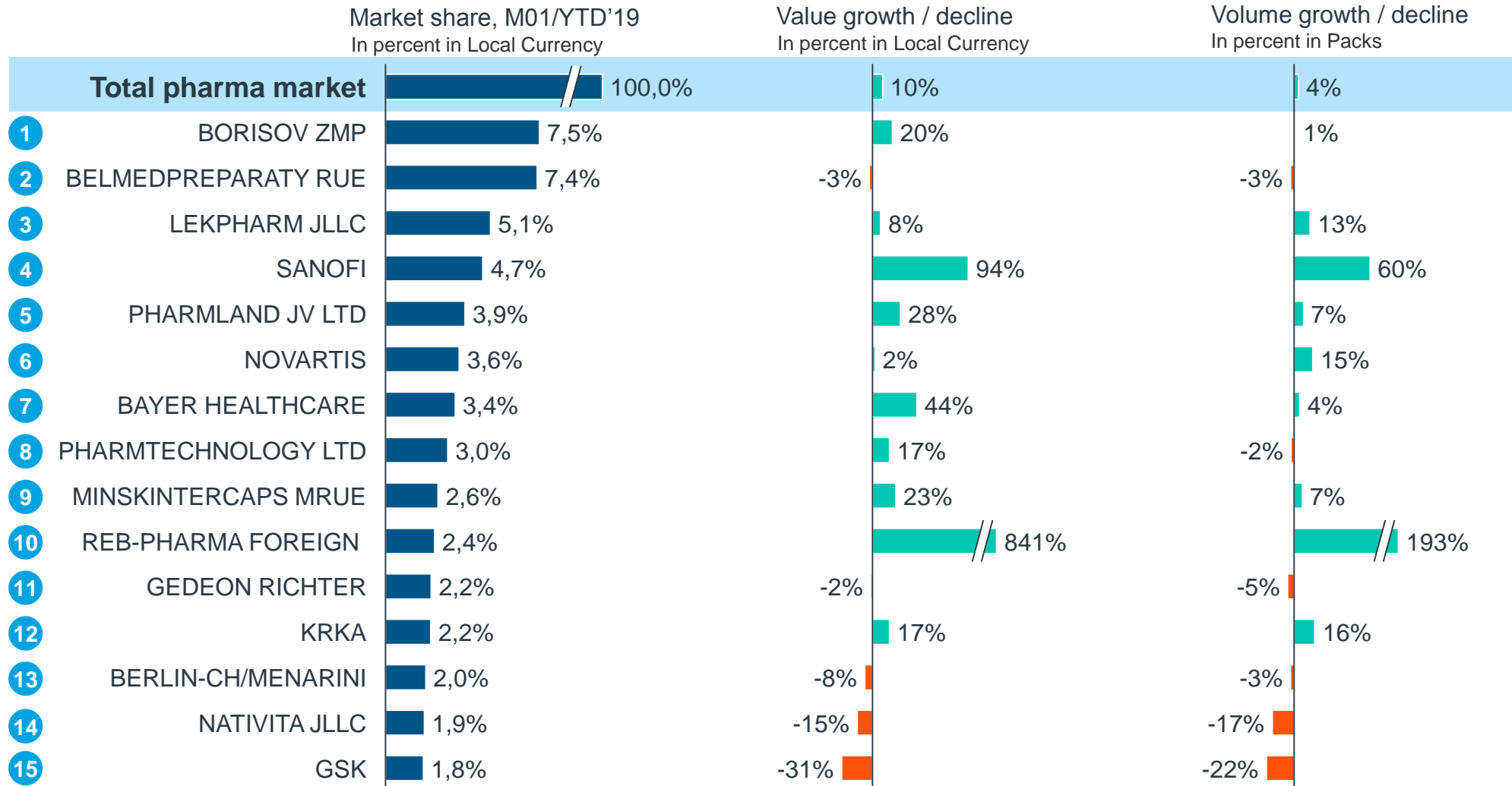
Market grew by 10% in value and by 3,5% in volume



Indicator	BLR	USD	EUR	PACKS
Value M01/YTD'19, Bln.	0,17	0,08	0,07	0,03
Growth M01/YTD'19%	▲ 10%	▲ 1,3%	▲ 7,9%	▲ 3,5%

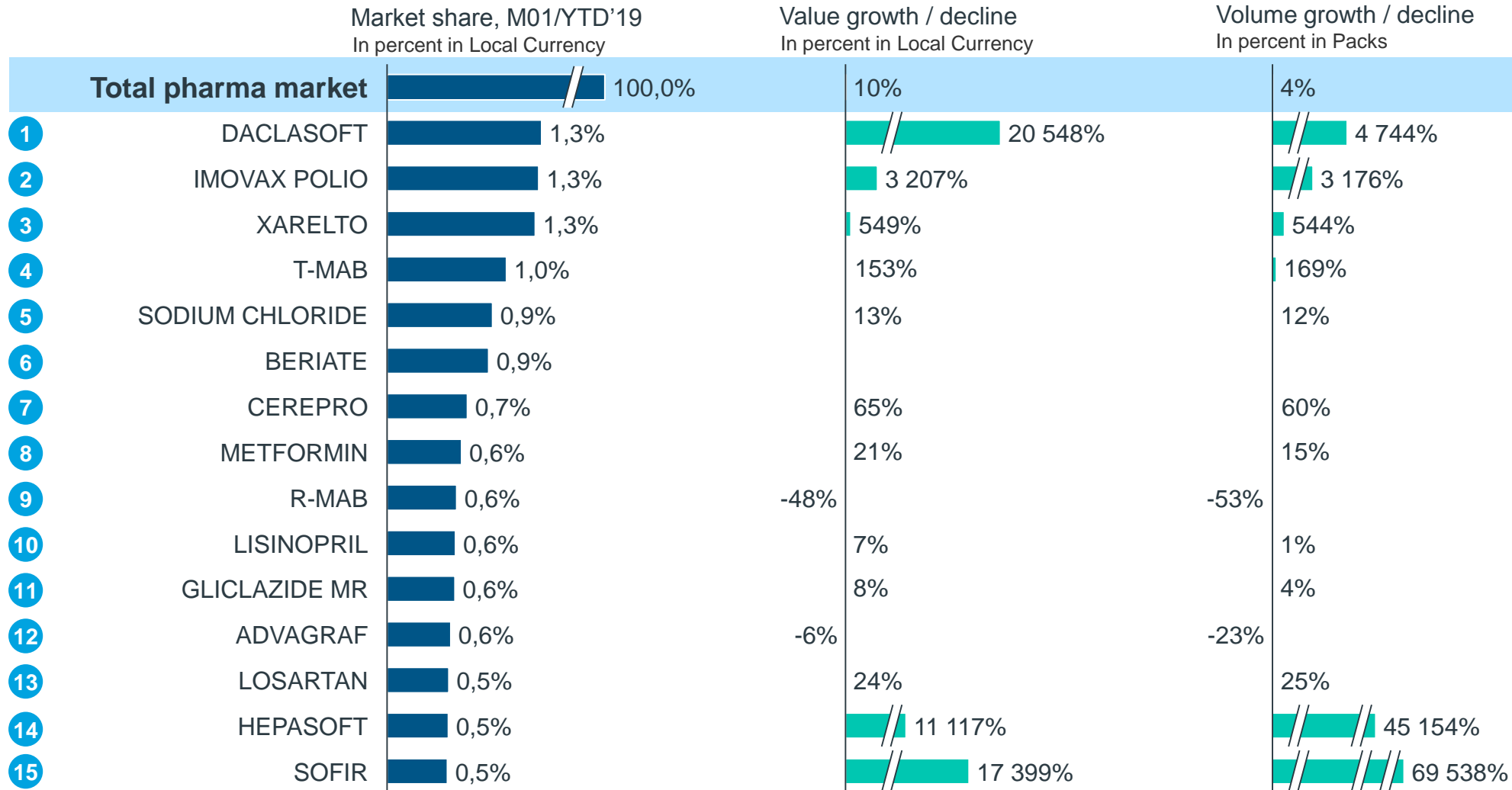


TOP-15 corporations on Belarus market, January 2019





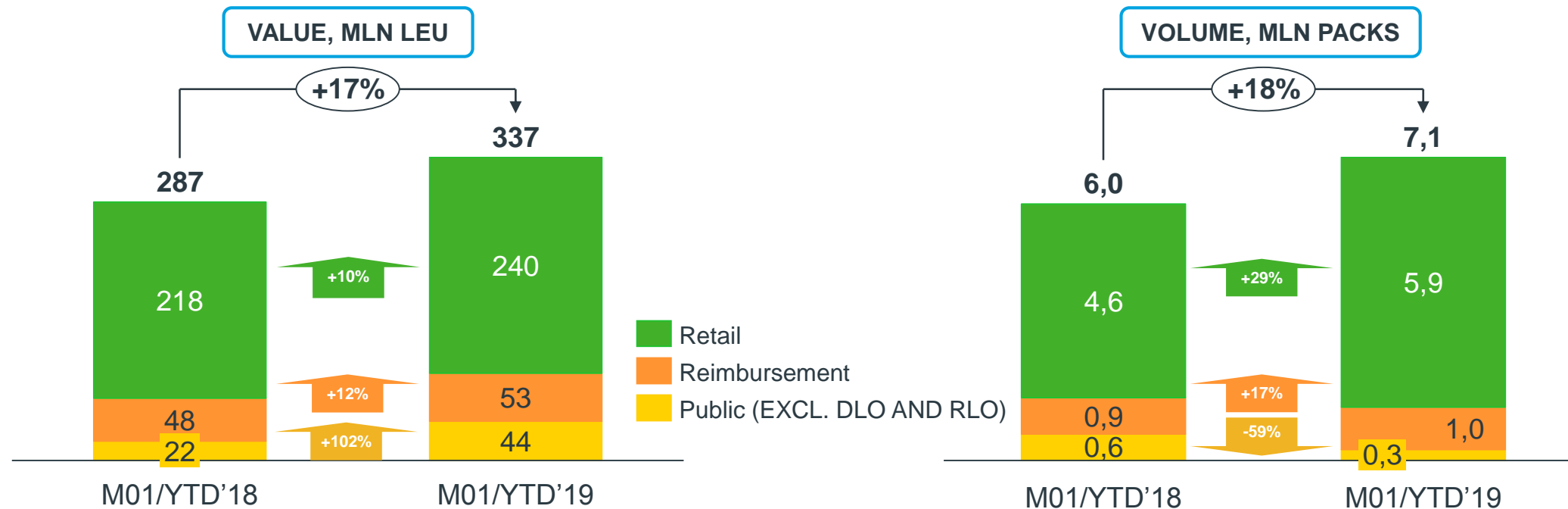
TOP-15 brands on Belarus market, January 2019





Moldova pharma market growth in January 2019

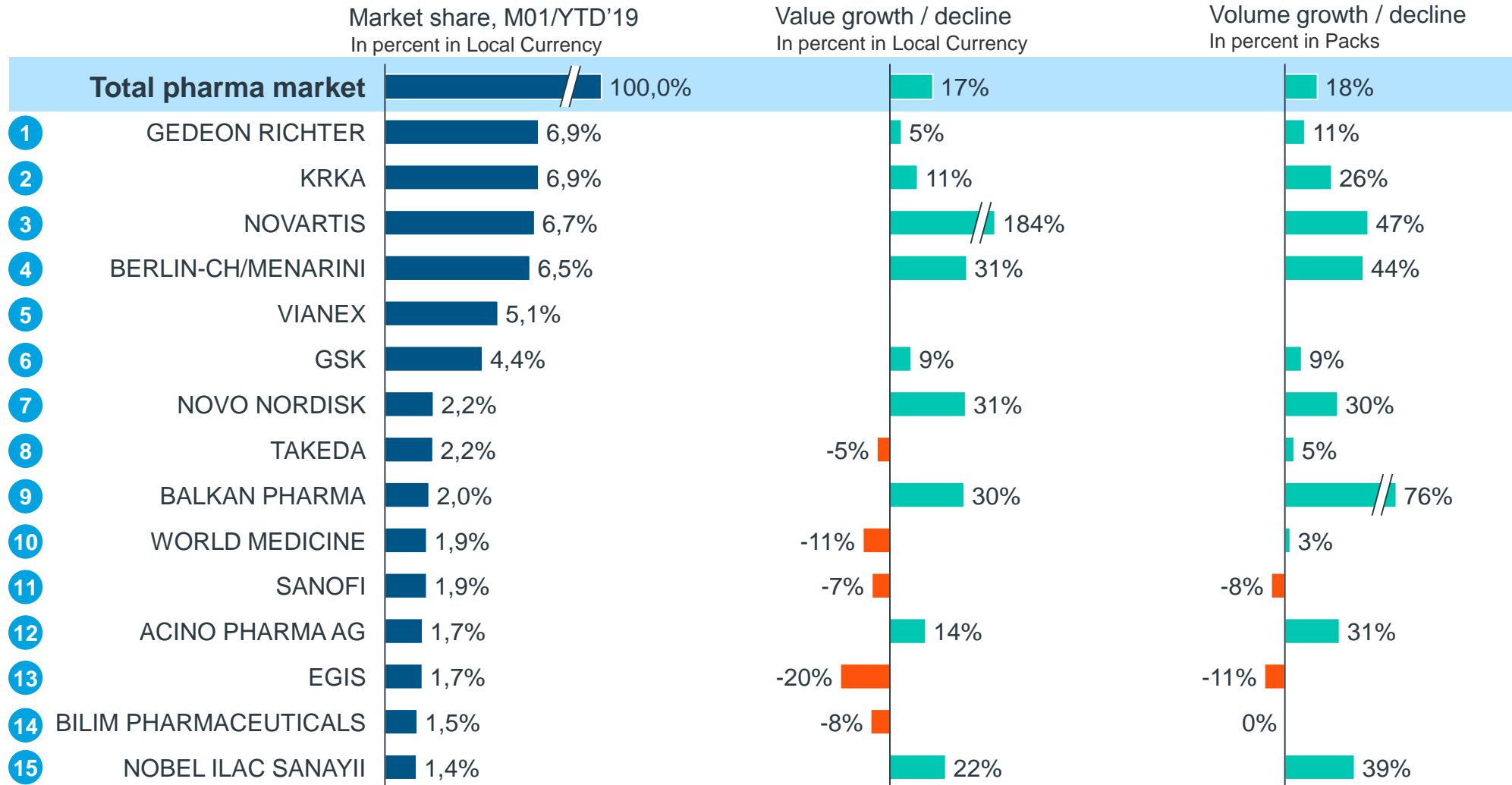
Market grew by 17% in value and by 18% in volume



Indicator	LEU	USD	EUR	PACKS
Value M01/YTD'19, Mln.	337	19,6	17,2	7,1
Growth M01/YTD'19%	▲ 17%	▲ 16%	▲ 24%	▲ 18%

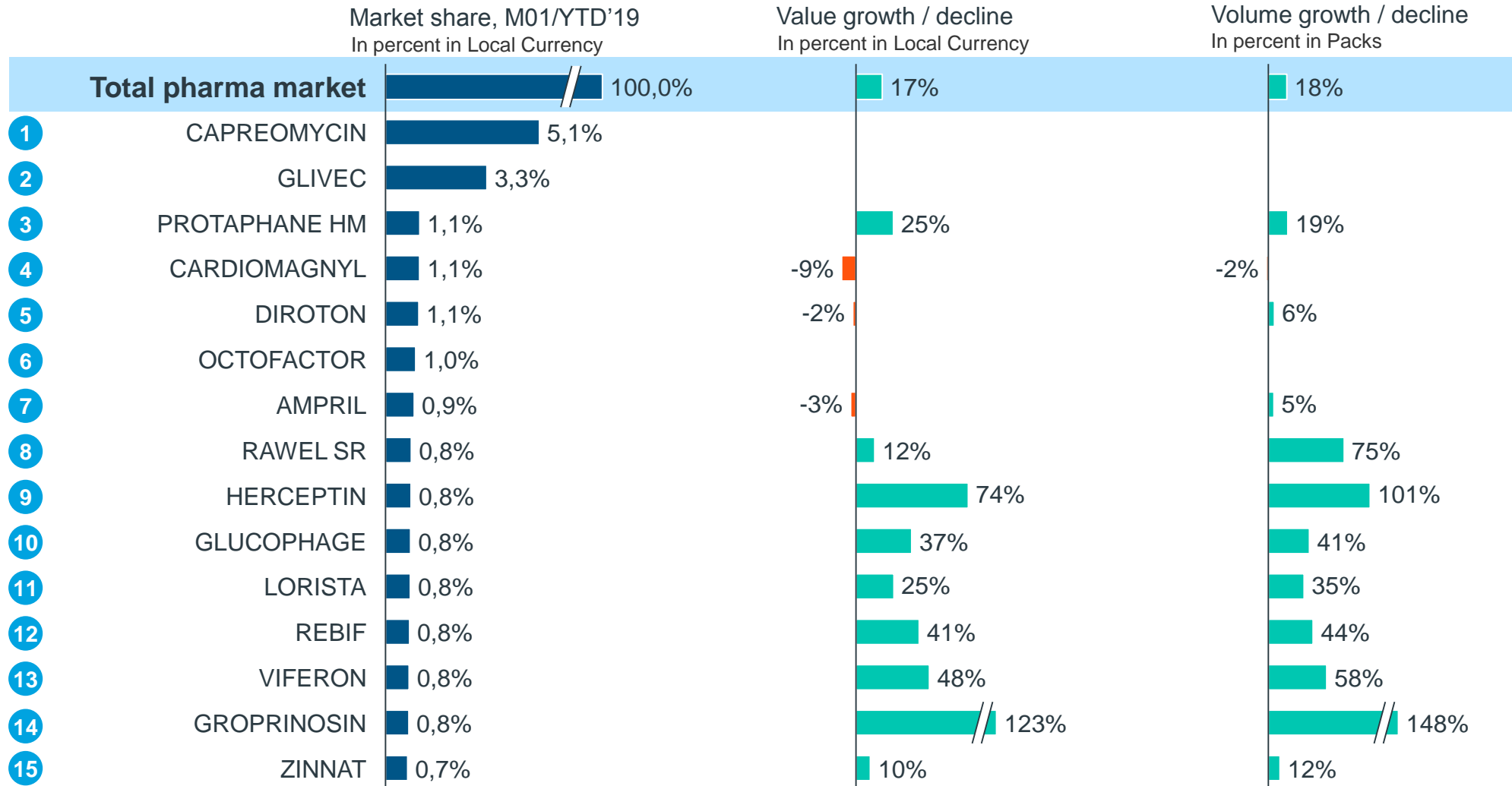


TOP-15 corporations on Moldova market, January 2019





TOP-15 brands on Moldova market, January 2019



Please Contact Us for More Information



Svetlana Nikulina
Sales Director

svetlana.nikulina@IQVIA.com
+7 499 272 05 00

Anton Kalyapin
Associate Director, Offering

Anton.Kalyapin@IQVIA.com
+7 499 272 05 00

Nadezhda Kalinich
Client Service Representative

Nadezhda.Kalinich@IQVIA.com
+7 499 272 05 00