



Facts from IQVIA

M02 2022



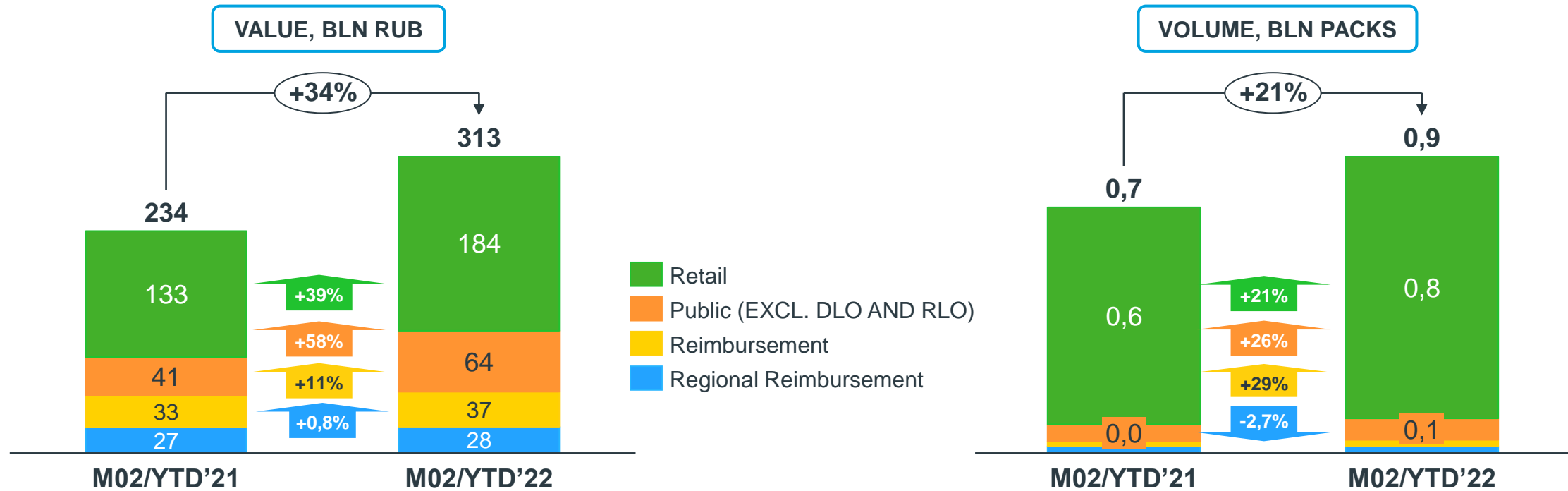
9,2%



INFLATION

Russian pharma market growth in Feb 2022

Market grew by 34% in value and 21% in volume



- Retail
- Public (EXCL. DLO AND RLO)
- Reimbursement
- Regional Reimbursement

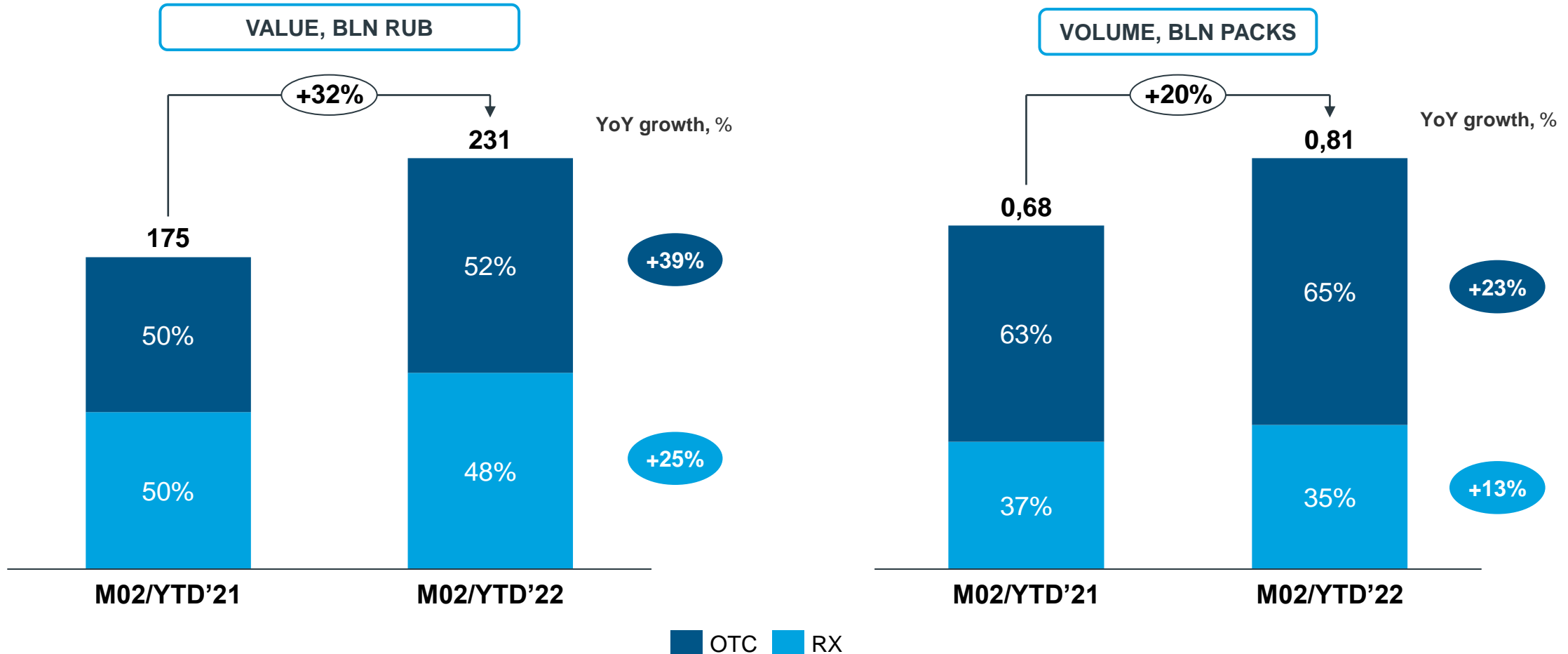
Indicator	RUB	USD	EUR	PACKS
Value M02/YTD'22, Bln.	313	4,1	3,6	0,9
Growth M02/YTD'22, %	▲ 34%	▲ 30%	▲ 39%	▲ 21%

Source: IQVIA databases. Retail, Public, DLO, RLO (excluding food supplements and diagnostic agents), TRD Prices
 Inflation Rate: [Countries - List \(tradingeconomics.com\)](https://tradingeconomics.com)



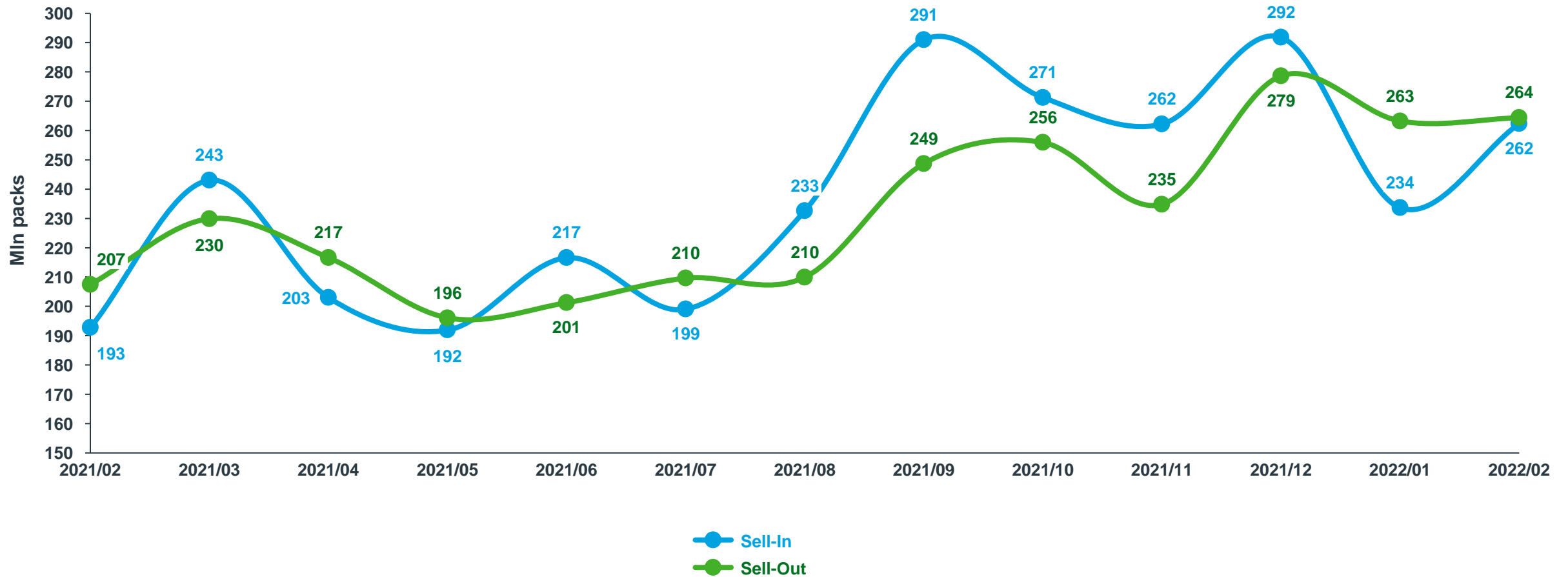
Russian pharma market increase in Feb 2022

Retail Sell-Out: Market grew by 32% in value and 20% in volume



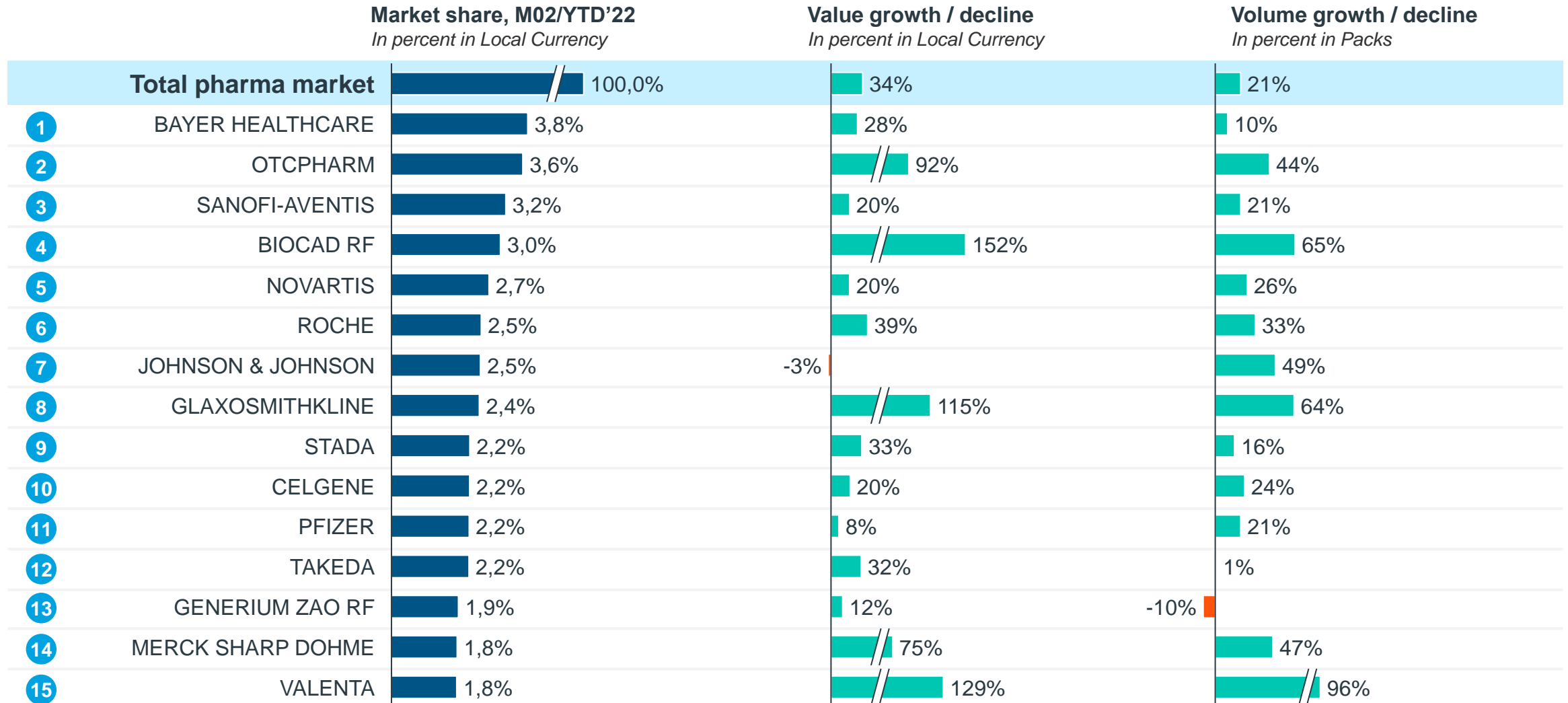


Sell-In vs Sell-Out, OTC registered drugs





TOP-15 corporations on Russian market, Feb 2022

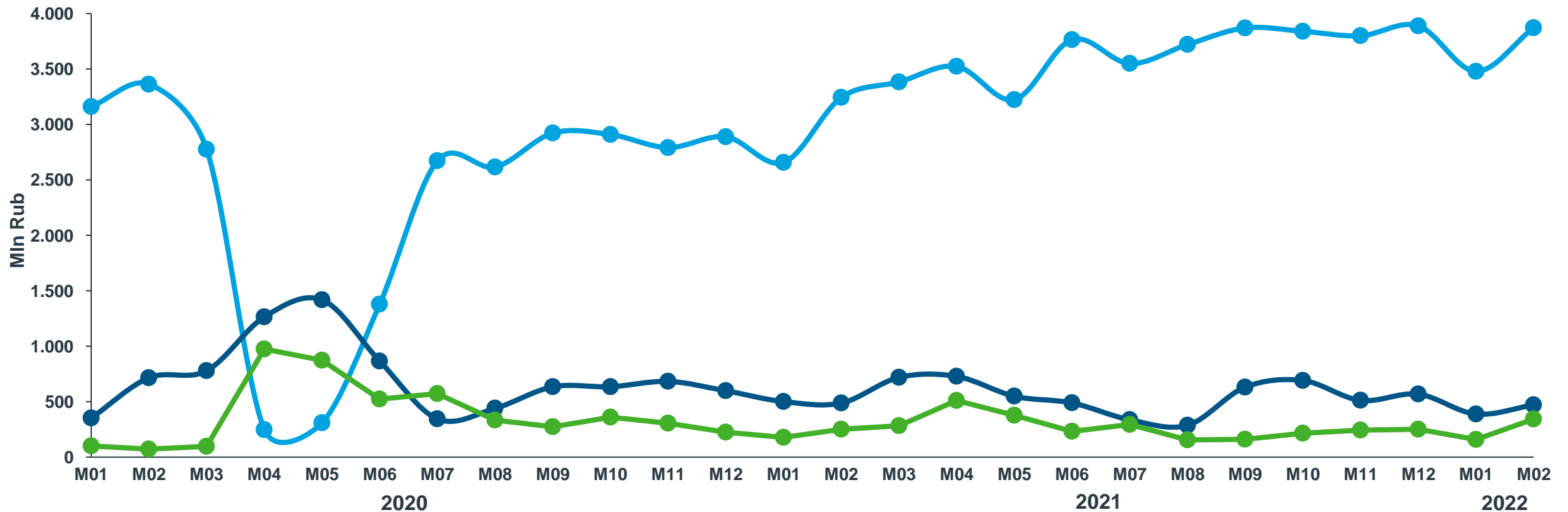




TOP-15 brands on Russian market, Feb 2022

		Market share, M02/YTD'22 <i>In percent in Local Currency</i>	Value growth / decline <i>In percent in Local Currency</i>	Volume growth / decline <i>In percent in Packs</i>
Total pharma market		100,0%	34%	21%
1	ARBIDOL	2,2%	237%	226%
2	REVLIMIDE	2,0%	18%	18%
3	XARELTO	1,5%	47%	54%
4	ILSIRA	1,4%	949%	1000%
5	ELIQUIS	1,1%	100%	132%
6	KEYTRUDA	0,9%	24%	24%
7	INGAVIRIN	0,9%	245%	235%
8	CORONAVIR	0,8%	94%	221%
9	ELIZARIA	0,8%	12%	13%
10	OPDIVO	0,8%	23%	24%
11	ARTLEGIA	0,7%	29%	28%
12	ELAPRASE	0,7%	387%	387%
13	GRIPPFERON	0,6%	165%	180%
14	THERAFLU	0,5%	178%	146%
15	OCREVUS	0,5%	101%	116%

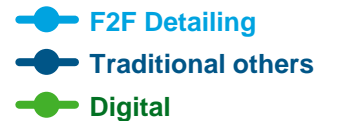
Promotional interactions in value Rub by channel in Russia, January 2020 – February 2022



F2F Detailing – Reps visits. **Traditional others:** 1) F2F meetings – group meetings, round tables etc, 2) Phone Detailing – phone calls, 3) E-mail – communication via email. 4) Post Mailing – paper mails. **Digital:** 1) E-detailing – 1-1 calls visits using digitabl platforms 2) E-meetings – group e-meetings, webinars etc

Value – a cost of each interaction projected on doctor’s universe

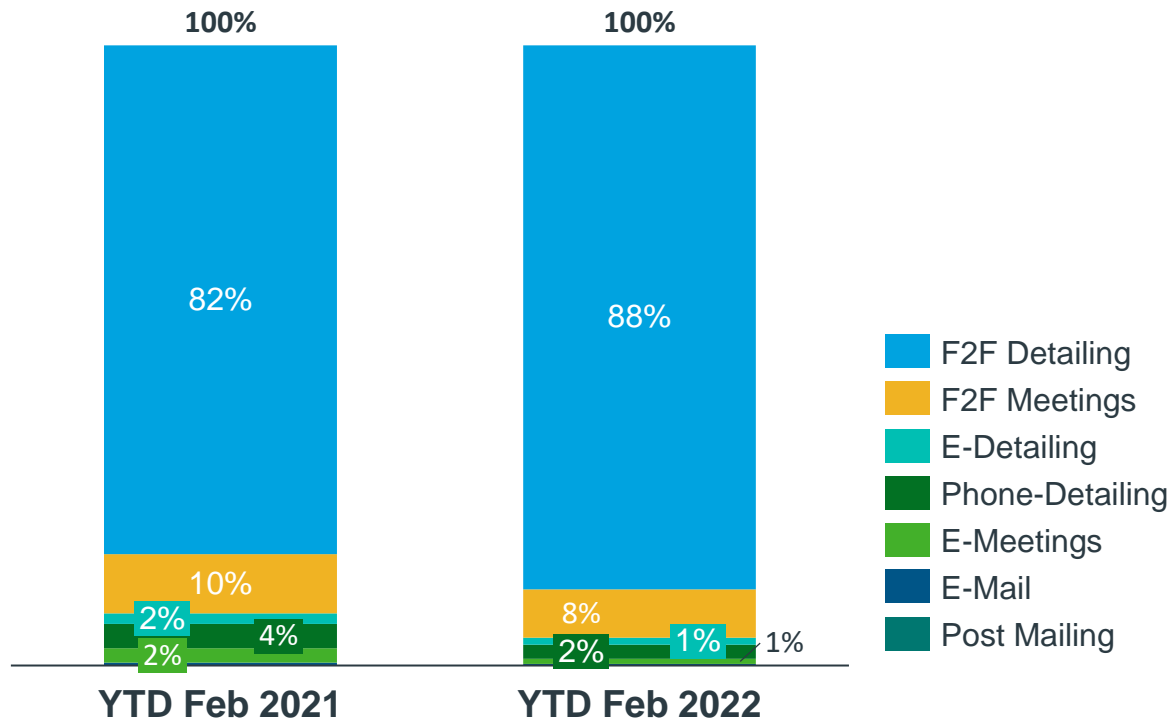
Source: IQVIA Russia, Channel Dynamics promo évaluation; Specialties: Allergology/Pulmonology, Cardiology, Dermatology, Diabetes, E.N.T., Gastroenterology, GPs, Gynecology, Neurology, Oncology, Pediatric, Pharma, Psychotherapy, Urology.



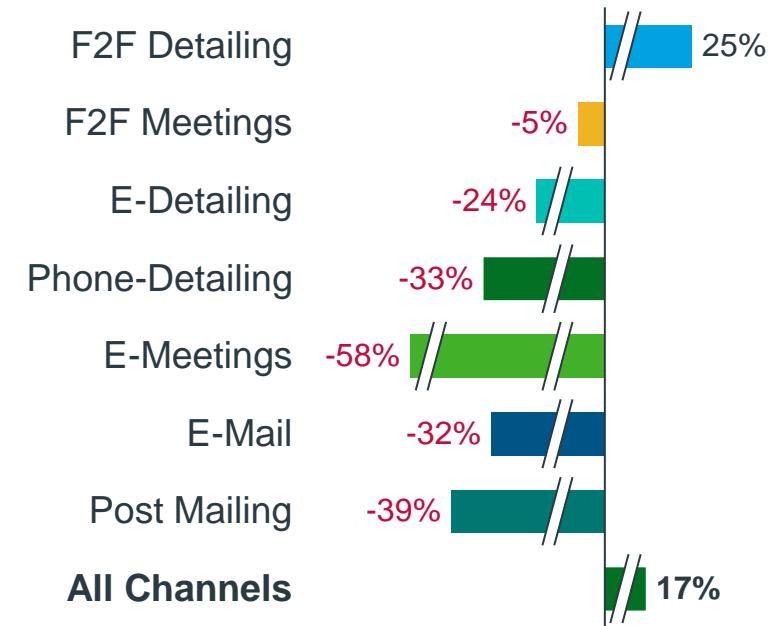
Total Market overall promotional value in Rub increased by 17%, YTD February 2022 vs 2021



Promotional value in Rub share by channel



% Changes in promotional value in Rub by channel
YTD February 2022 vs 2021



F2F Detailing – Reps visits. **Traditional others:** 1) F2F meetings – group meetings, round tables etc, 2) Phone Detailing – phone calls, 3) E-mail – communication via email. 4) Post Mailing – paper mails. **Digital:** 1) E-detailing – 1-1 calls visits using digitabl platforms 2) E-meetings – group e-meetings, webinars etc

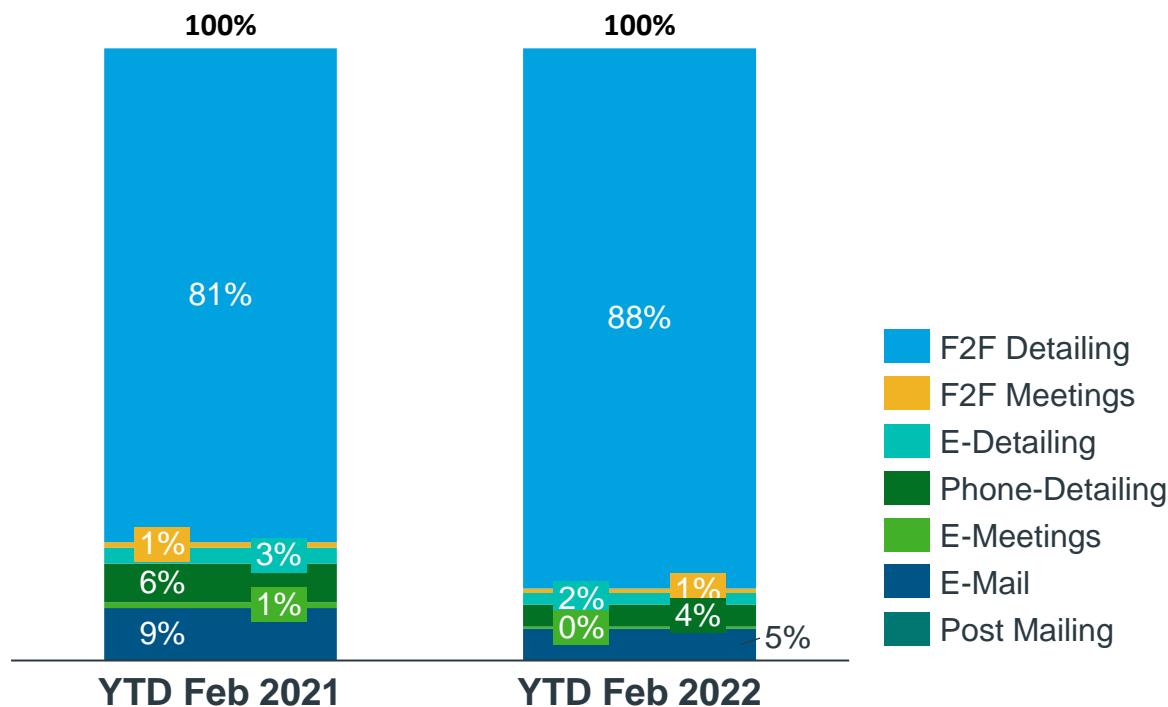
Value – a cost of each interaction projected on doctor’s universe

Source: IQVIA Russia, Channel Dynamics promo évaluation; Specialties: Allergology/Pulmonology, Cardiology, Dermatology, Diabetes, E.N.T., Gastroenterology, GPs, Gynecology, Neurology, Oncology, Pediatric, Pharma, Psychotherapy, Urology.

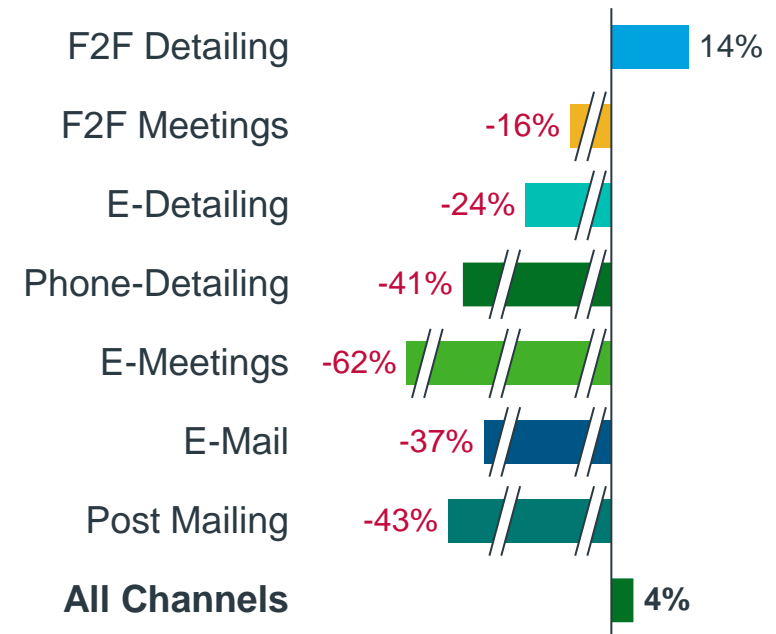
Total Market overall promotional volume (contacts) increased by 4%, YTD February 2022 vs 2021



Promotional value in Rub share by channel



% Changes in promotional volume (contacts) by channel YTD February 2022 vs 2021



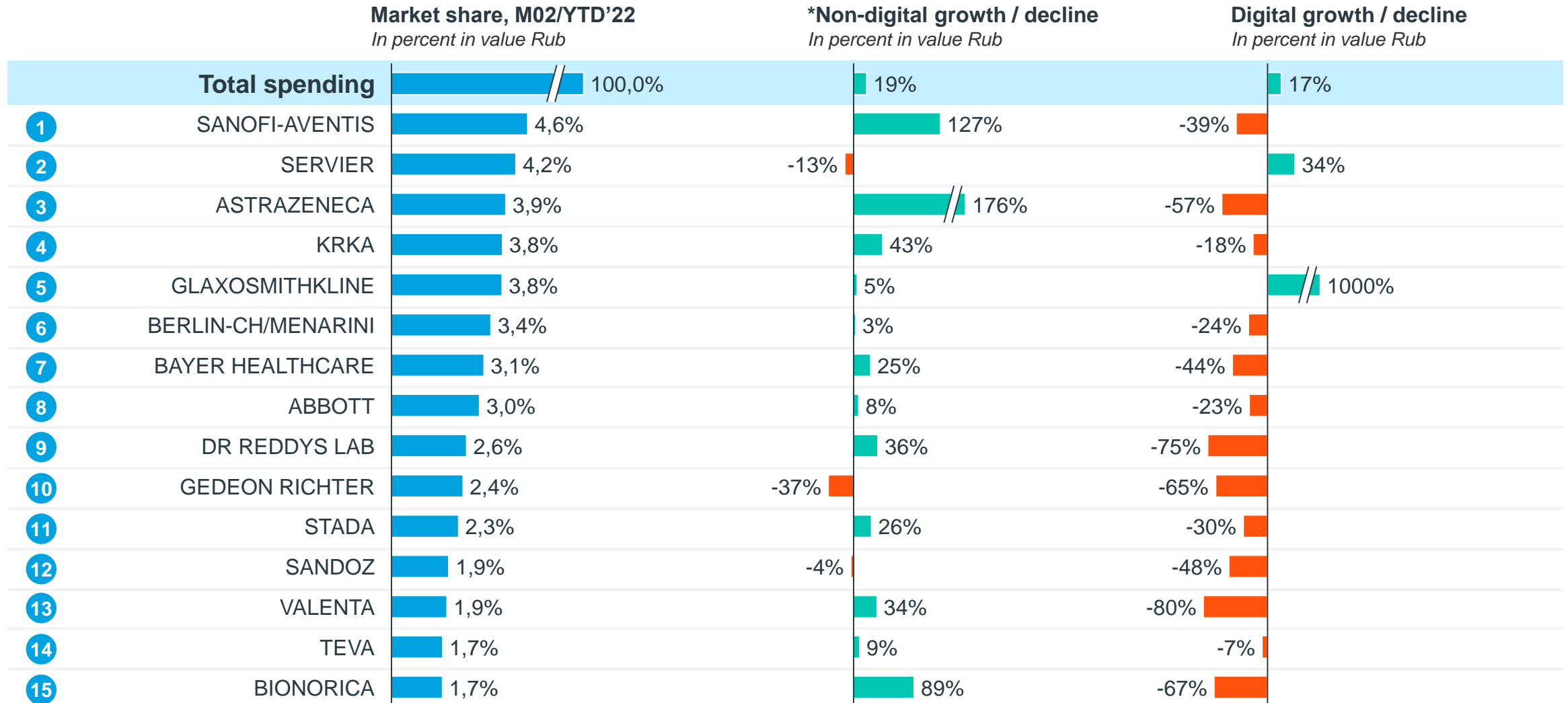
F2F Detailing – Reps visits. **Traditional others:** 1) F2F meetings – group meetings, round tables etc, 2) Phone Detailing – phone calls, 3) E-mail – communication via email. 4) Post Mailing – paper mails. **Digital:** 1) E-detailing – 1-1 calls visits using digitabl platforms 2) E-meetings – group e-meetings, webinars etc

Contacts – a number of visits, emails, phone calls projected on total doctor universe

Source: IQVIA Russia, Channel Dynamics promo évaluation; Specialties: Allergology/Pulmonology, Cardiology, Dermatology, Diabetes, E.N.T., Gastroenterology, GPs, Gynecology, Neurology, Oncology, Pediatric, Pharma, Psychotherapy, Urology.



TOP-15 corporations on promotional value in Rub, YTD February 2022



*Non-digital: F2F Detailing + Traditional others.

Source: IQVIA Russia, Channel Dynamics promo evaluation; Specialties: Allergology/Pulmonology, Cardiology, Dermatology, Diabetes, E.N.T., Gastroenterology, GPs, Gynecology, Neurology, Oncology, Pediatric, Pharma, Psychotherapy, Urology.



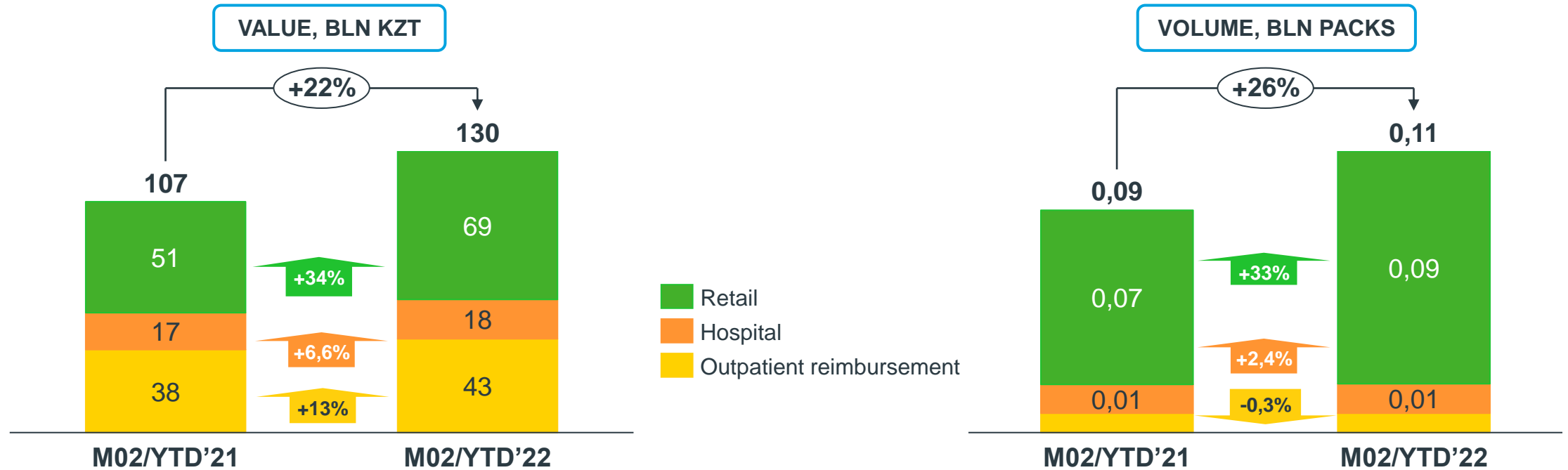
8,7%



INFLATION

Kazakhstan pharma market growth in Feb 2022

Market grew by 22% in value and 26% in volume

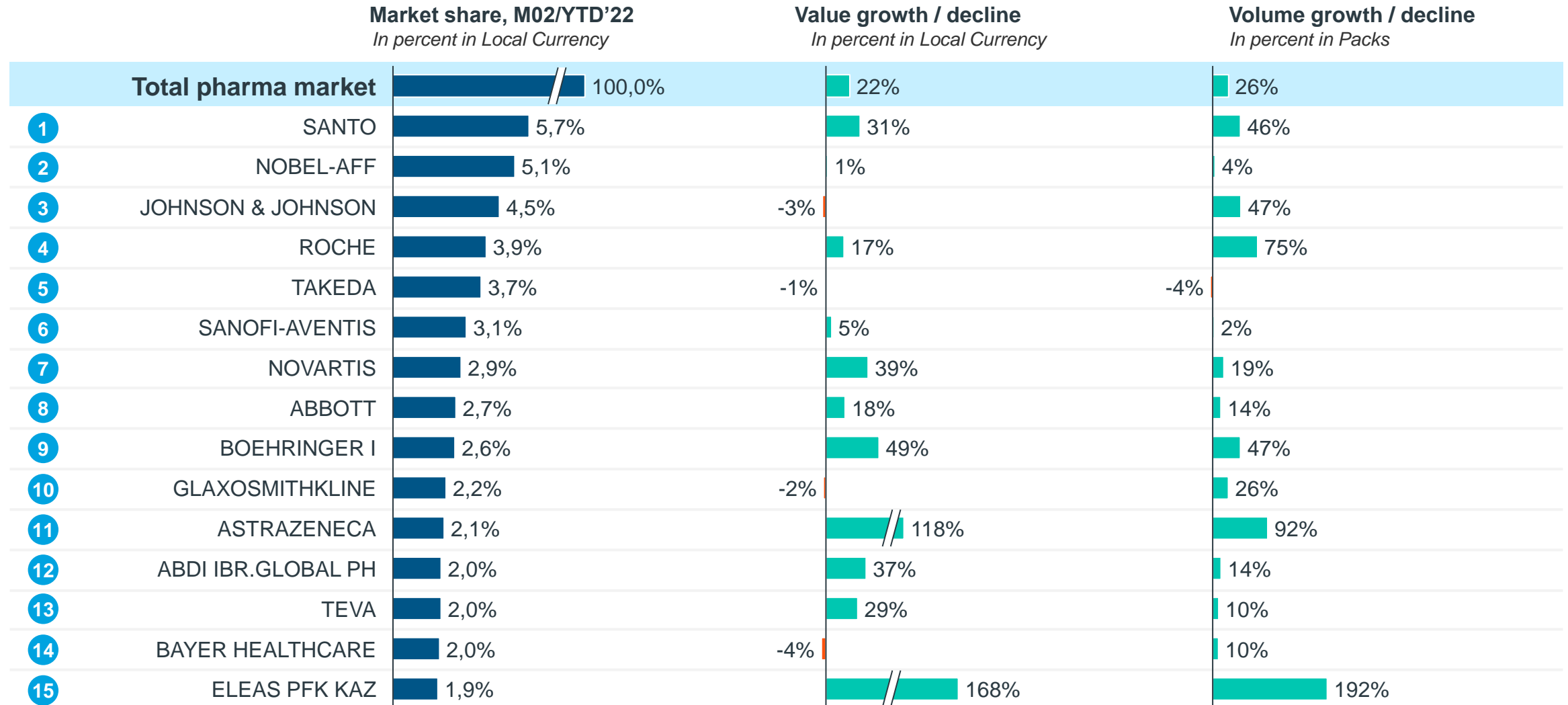


Indicator	KZT	USD	EUR	PACKS
Value M02/YTD'22, Bln.	130	0,30	0,26	0,11
Growth M02/YTD'22, %	▲ 22%	▲ 18%	▲ 26%	▲ 26%

Source: IQVIA databases. Retail, Hospital, Reimbursement (excluding food supplements and diagnostic agents), TRD Prices
[Inflation Rate: Countries - List \(tradingeconomics.com\)](https://tradingeconomics.com)

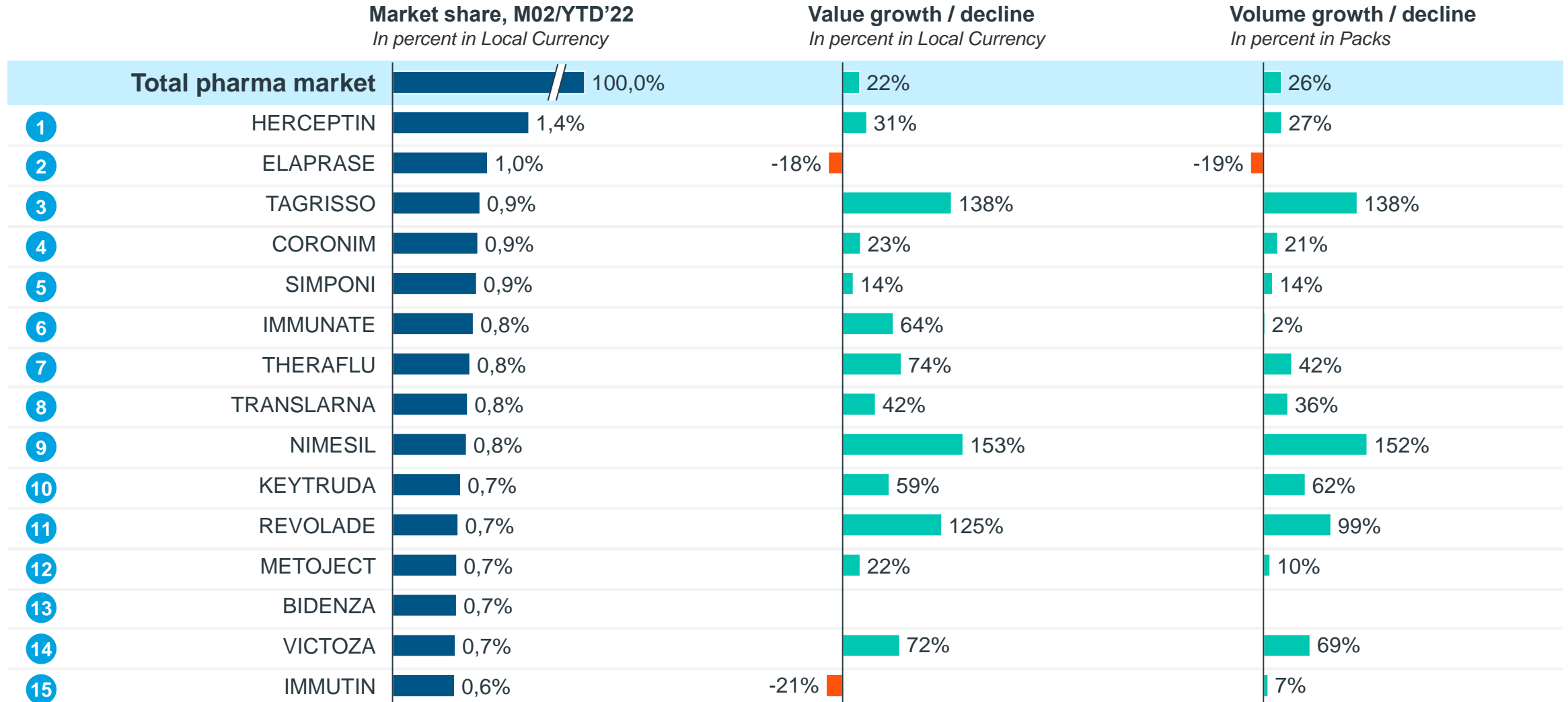


TOP-15 corporations on Kazakhstan market, Feb 2022





TOP-15 brands on Kazakhstan market, Feb 2022





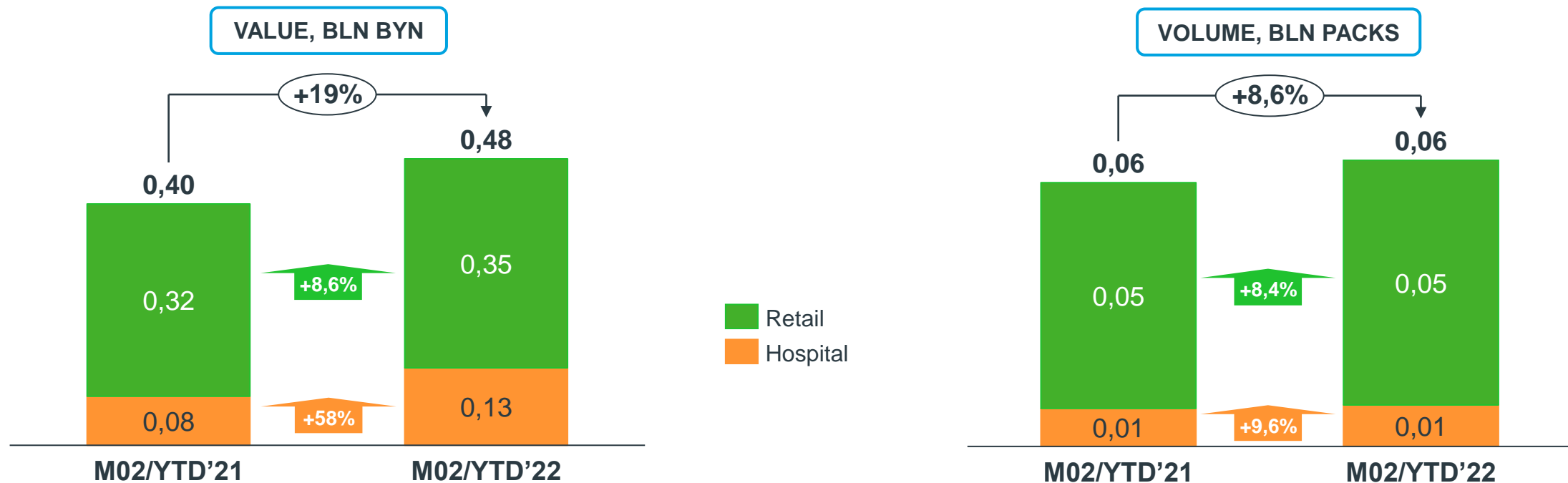
10,0%



INFLATION

Belarus pharma market growth in Feb 2022

Market grew by 19% in value and 9% in volume

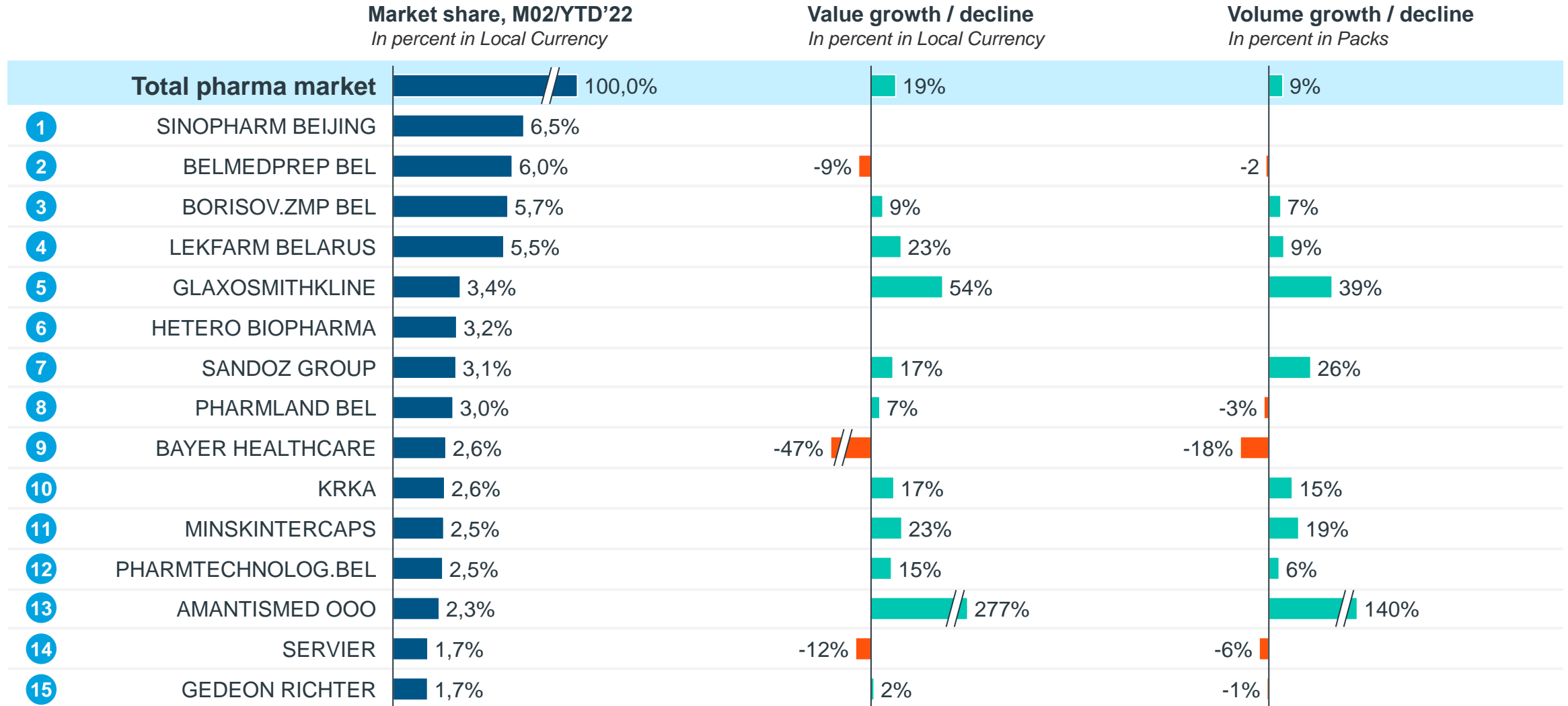


Indicator	BYN	USD	EUR	PACKS
Value M02/YTD'22, Bln.	0,48	0,18	0,16	0,06
Growth M02/YTD'22, %	▲ 19%	▲ 18%	▲ 27%	▲ 8,6%

Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices
[Inflation Rate: Countries - List \(tradingeconomics.com\)](https://tradingeconomics.com)

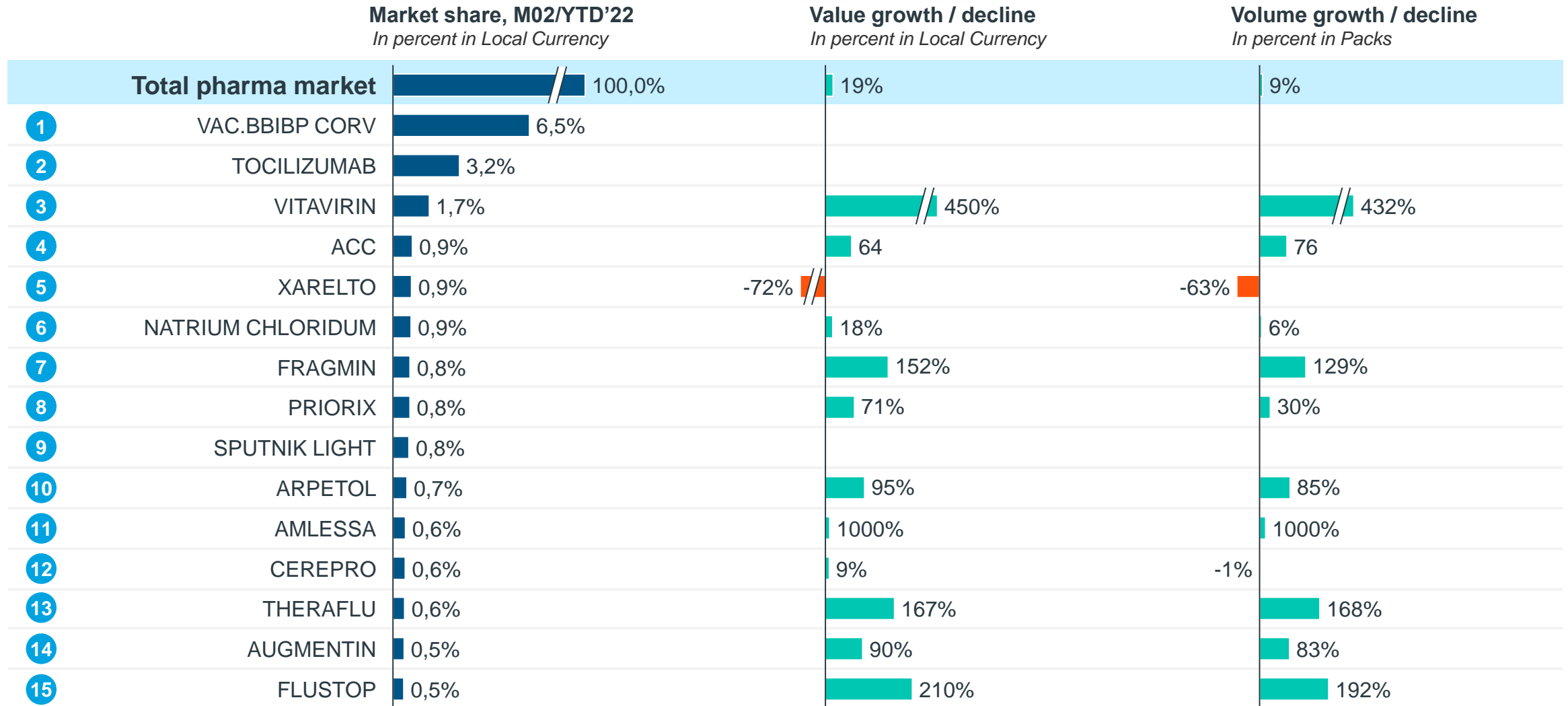


TOP-15 corporations on Belarus market, Feb 2022





TOP-15 brands on Belarus market, Feb 2022





9,7%



INFLATION

Uzbekistan pharma market growth in Feb 2022

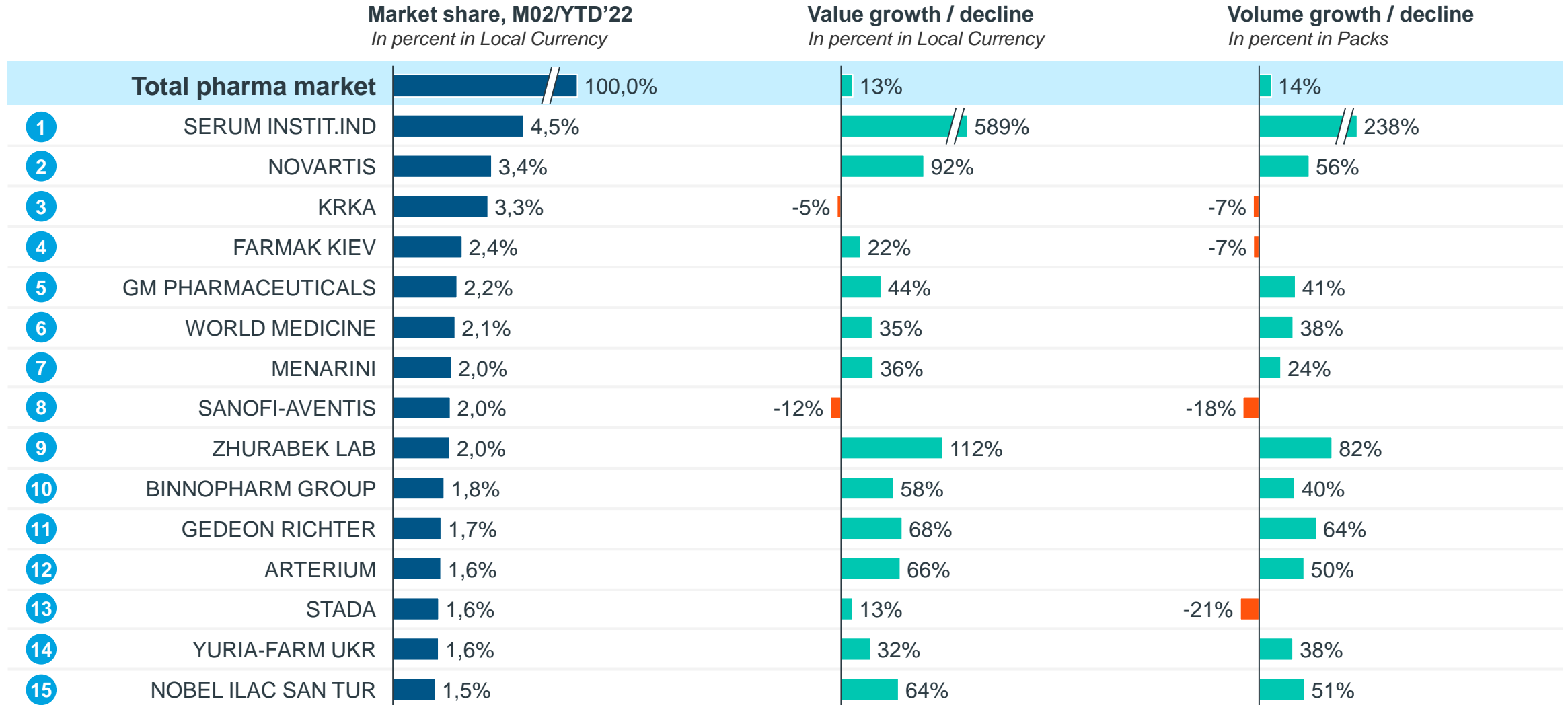
Market grew by 13% in value and 14% in volume



Indicator	UZS	USD	EUR	PACKS
Value M02/YTD'22, Bln.	3 232	0,30	0,26	0,18
Growth M02/YTD'22, %	▲ 13%	▲ 9%	▲ 17%	▲ 14%



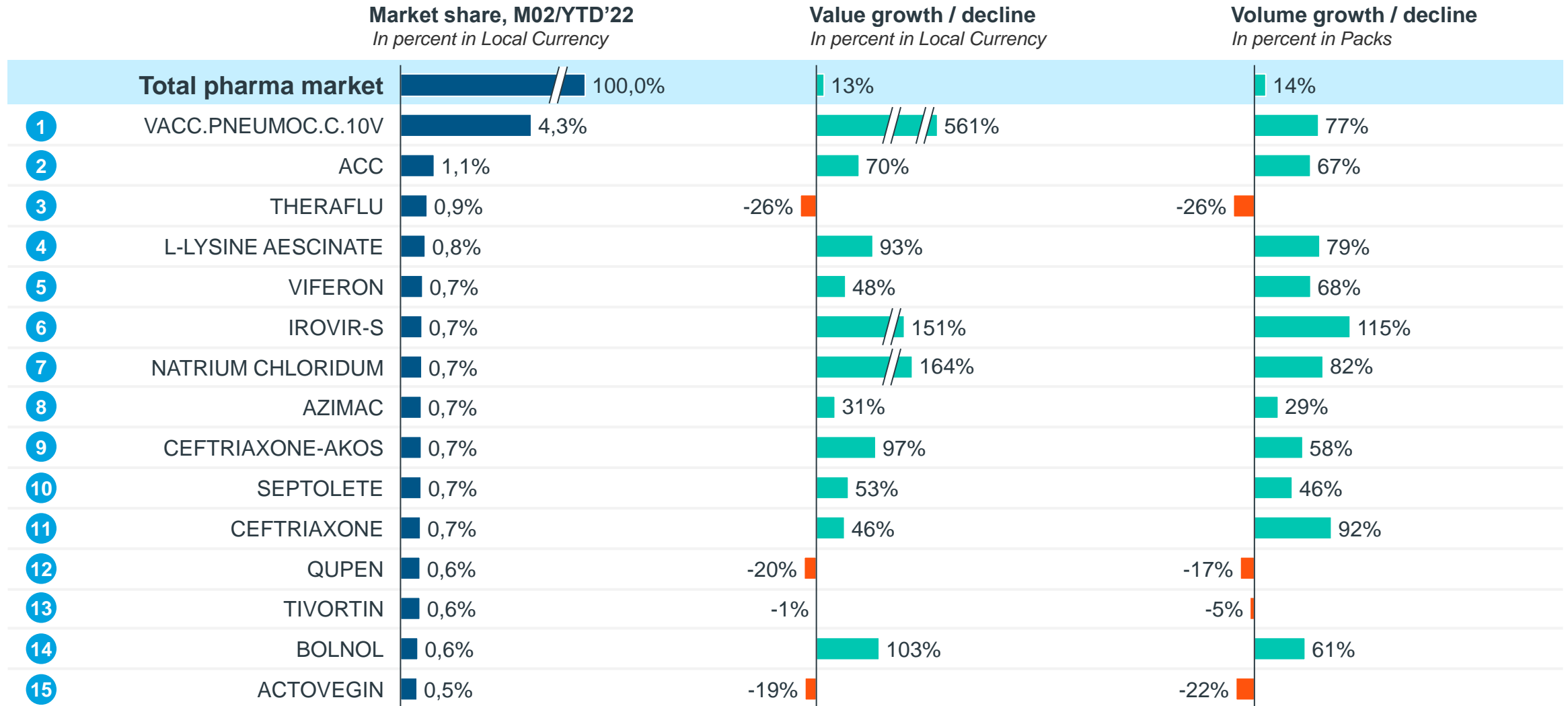
TOP-15 corporations on Uzbekistan market, Feb 2022



Source: IQVIA databases. Retail, Hospital (excluding food supplements and diagnostic agents), TRD Prices
[Inflation Rate: Countries - List \(tradingeconomics.com\)](https://tradingeconomics.com)



TOP-15 brands on Uzbekistan market, Feb 2022





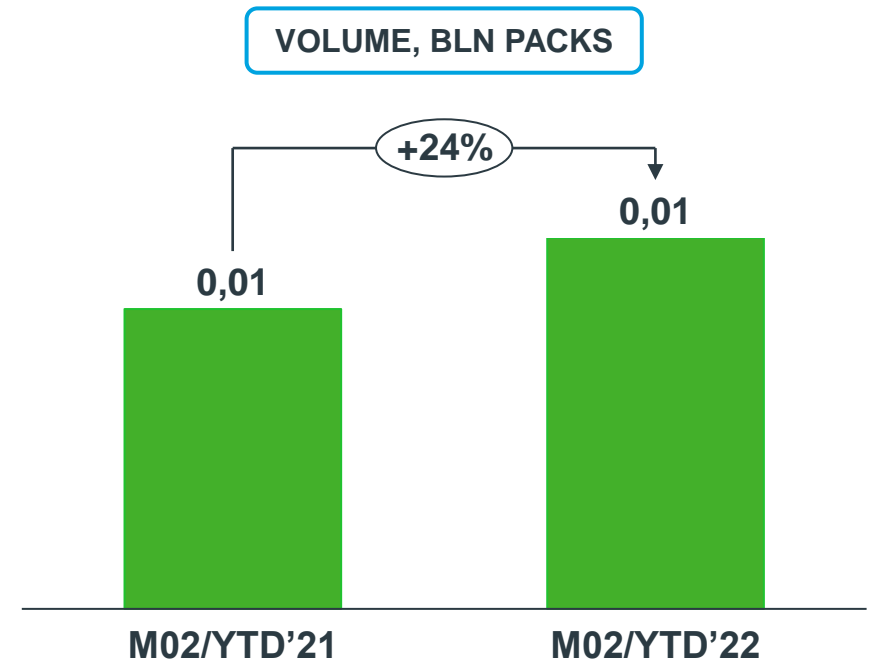
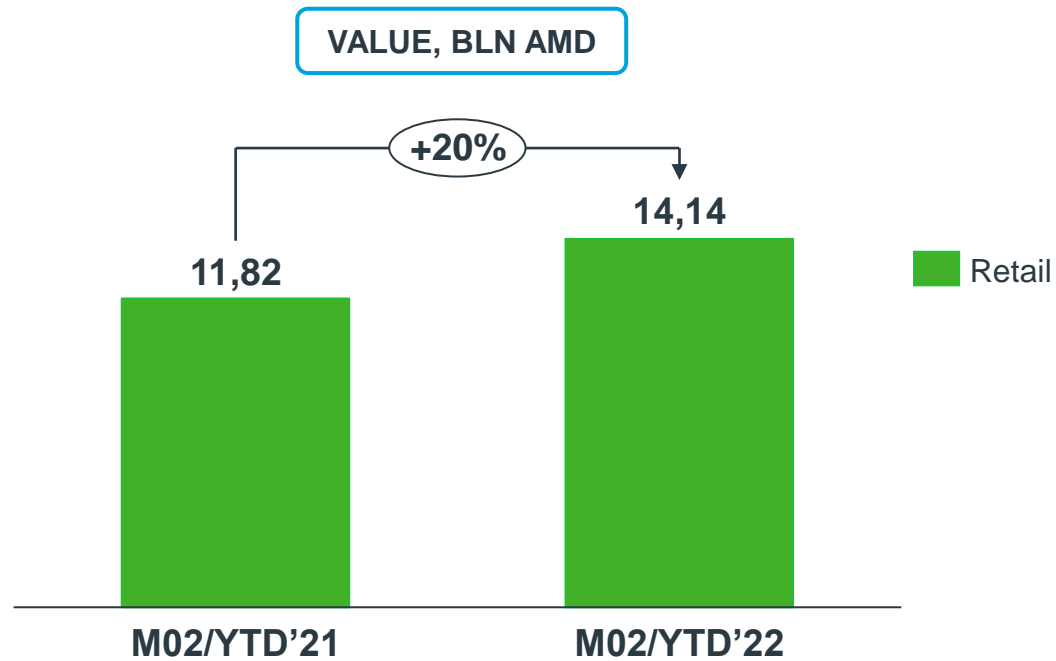
6,5%



INFLATION

Armenia pharma market growth in Feb 2022

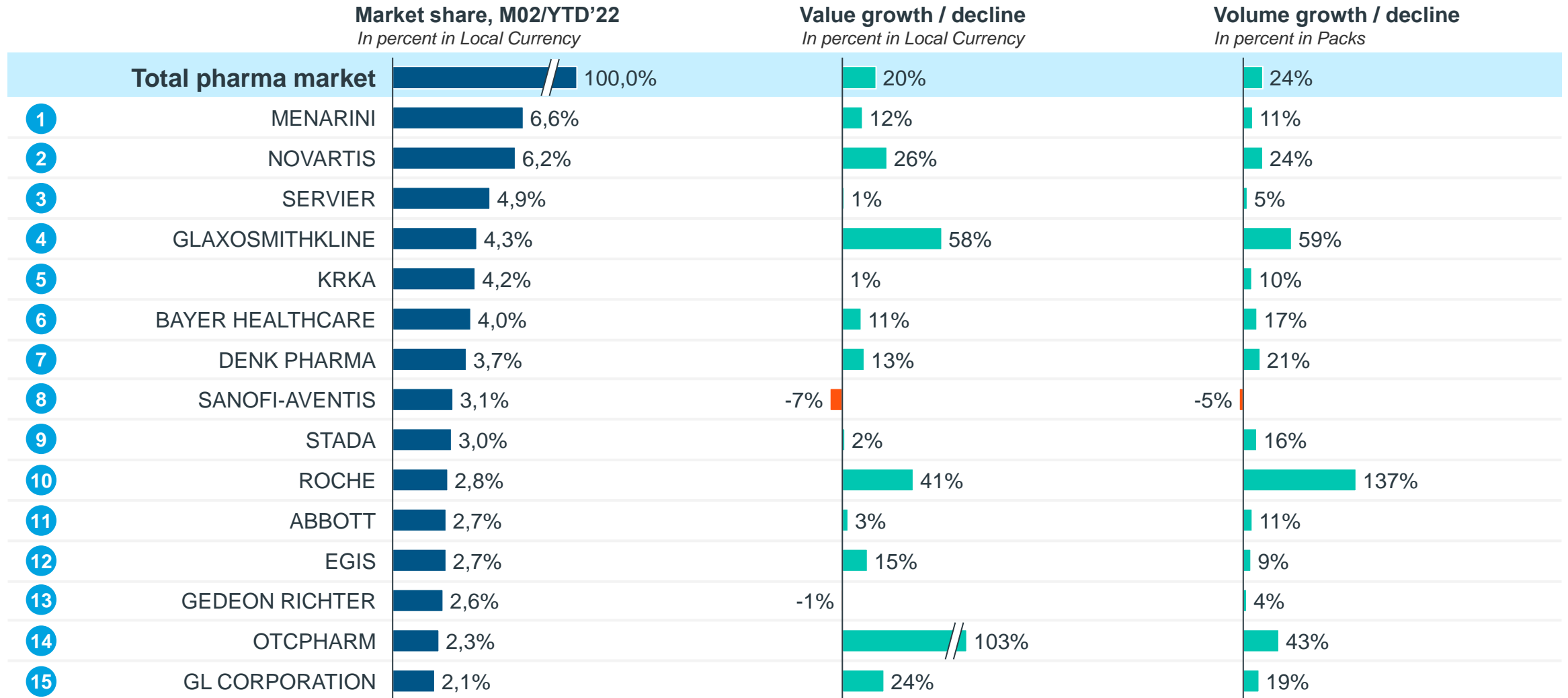
Market grew by 20% in value and by 24% in volume



Indicator	AMD	USD	EUR	PACKS
Value M02/YTD'22, Bln.	14,1	0,03	0,03	0,01
Growth M02/YTD'22, %	▲ 20%	▲ 30%	▲ 39%	▲ 24%

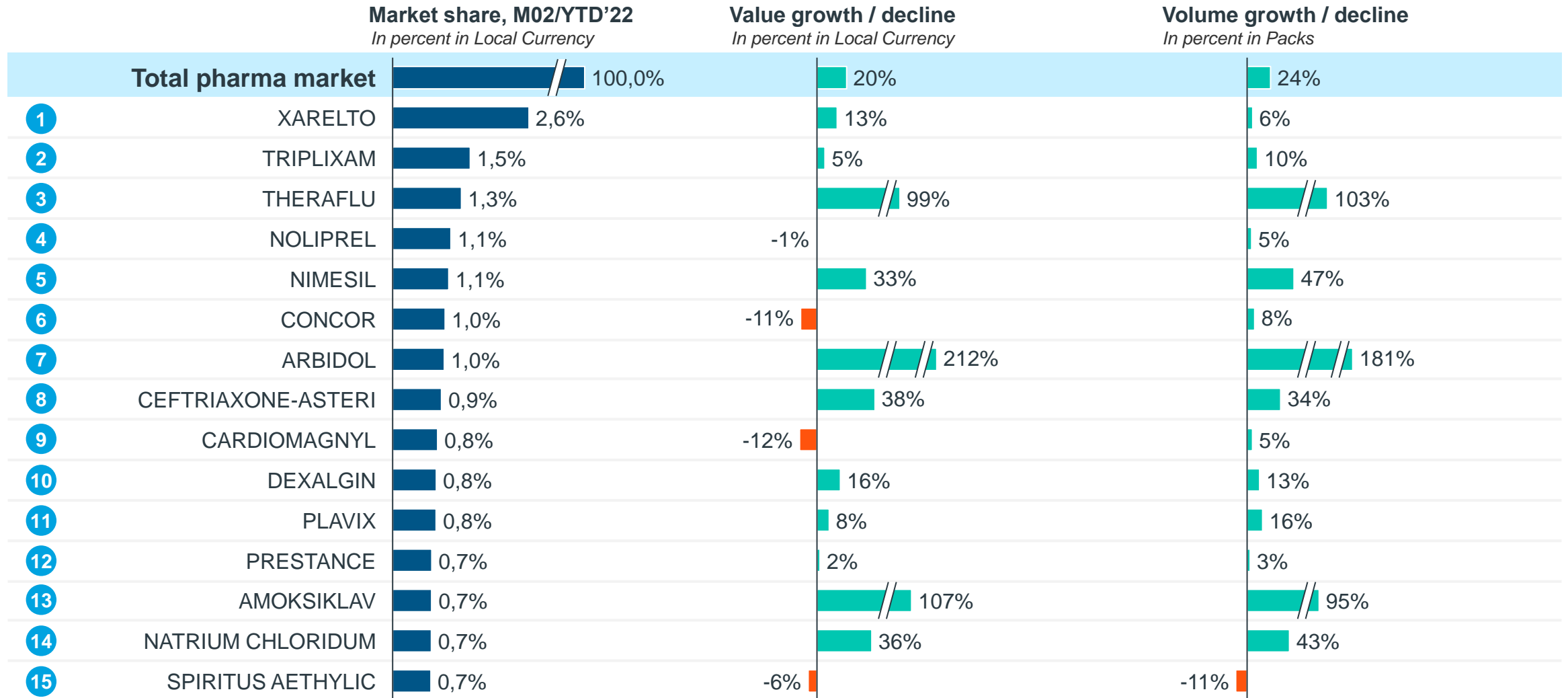


TOP-15 corporations on Armenia market, Feb 2022





TOP-15 brands on Armenia market, Feb 2022





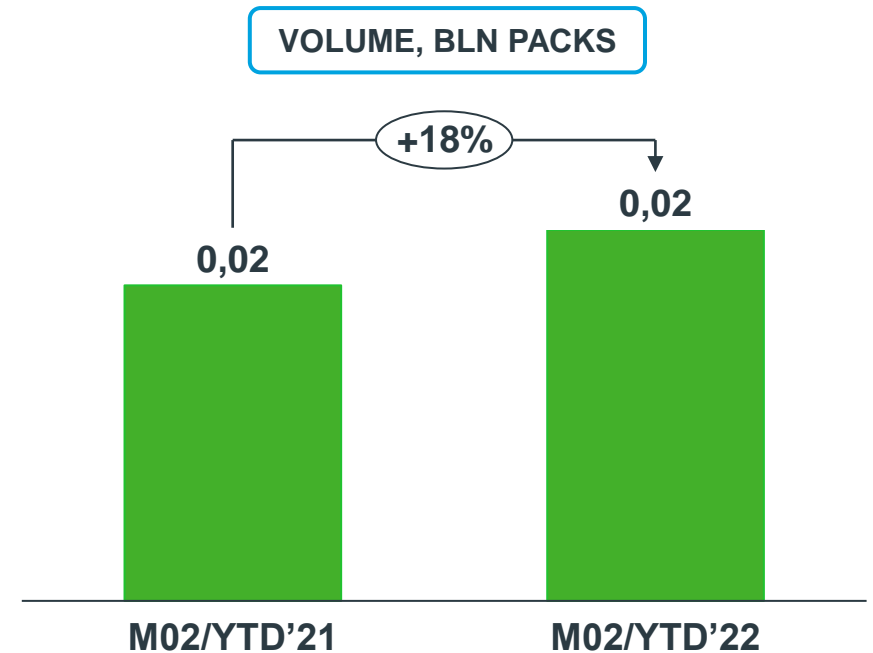
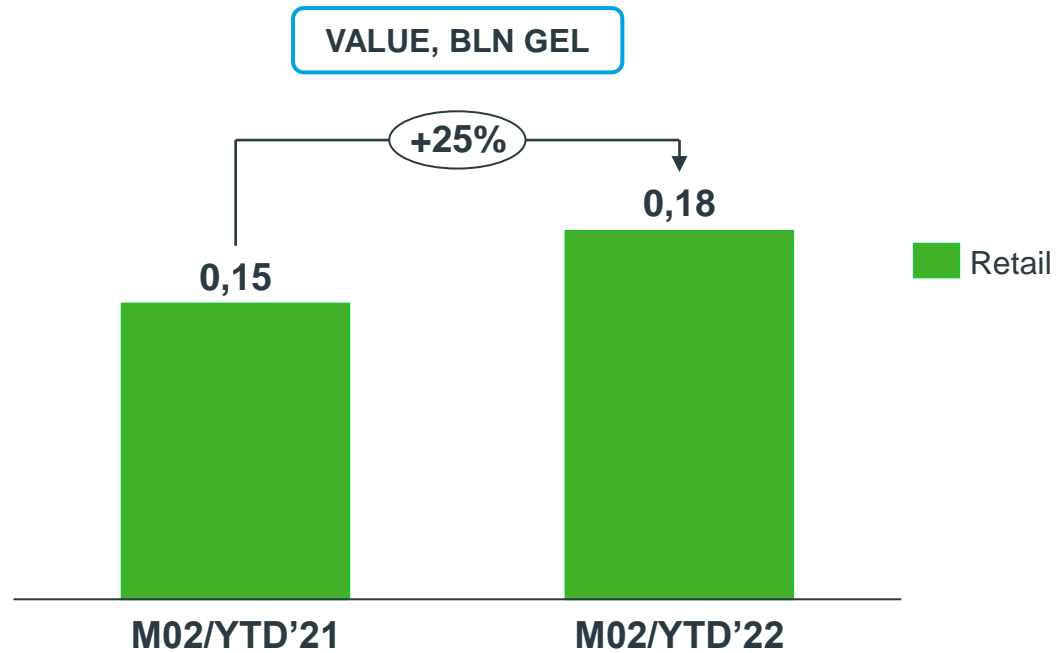
13,7%



INFLATION

Georgia pharma market growth in Feb 2022

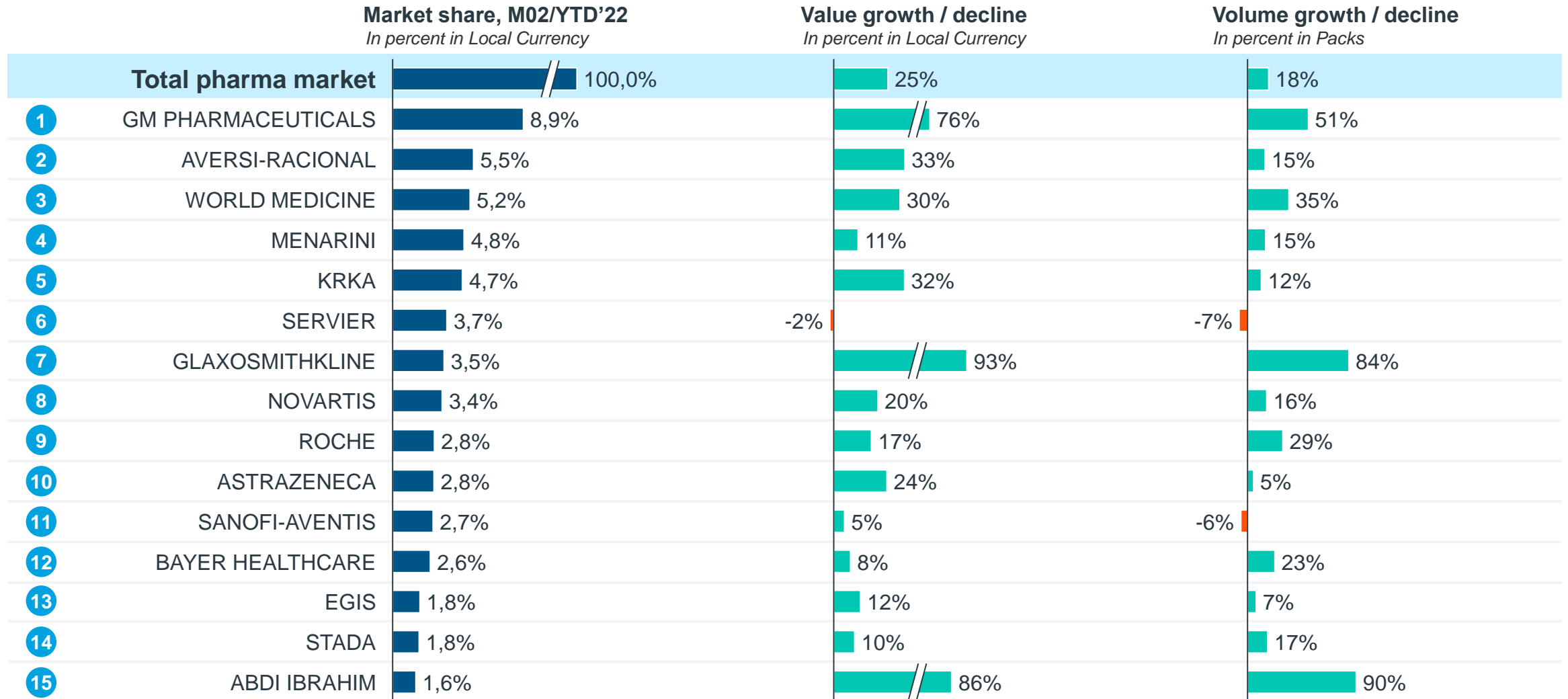
Market grew by 25% in value and by 18% in volume



Indicator	GEL	USD	EUR	PACKS
Value M02/YTD'22, Bln.	0,2	0,06	0,05	0,02
Growth M02/YTD'22, %	▲ 25%	▲ 36%	▲ 45%	▲ 18%

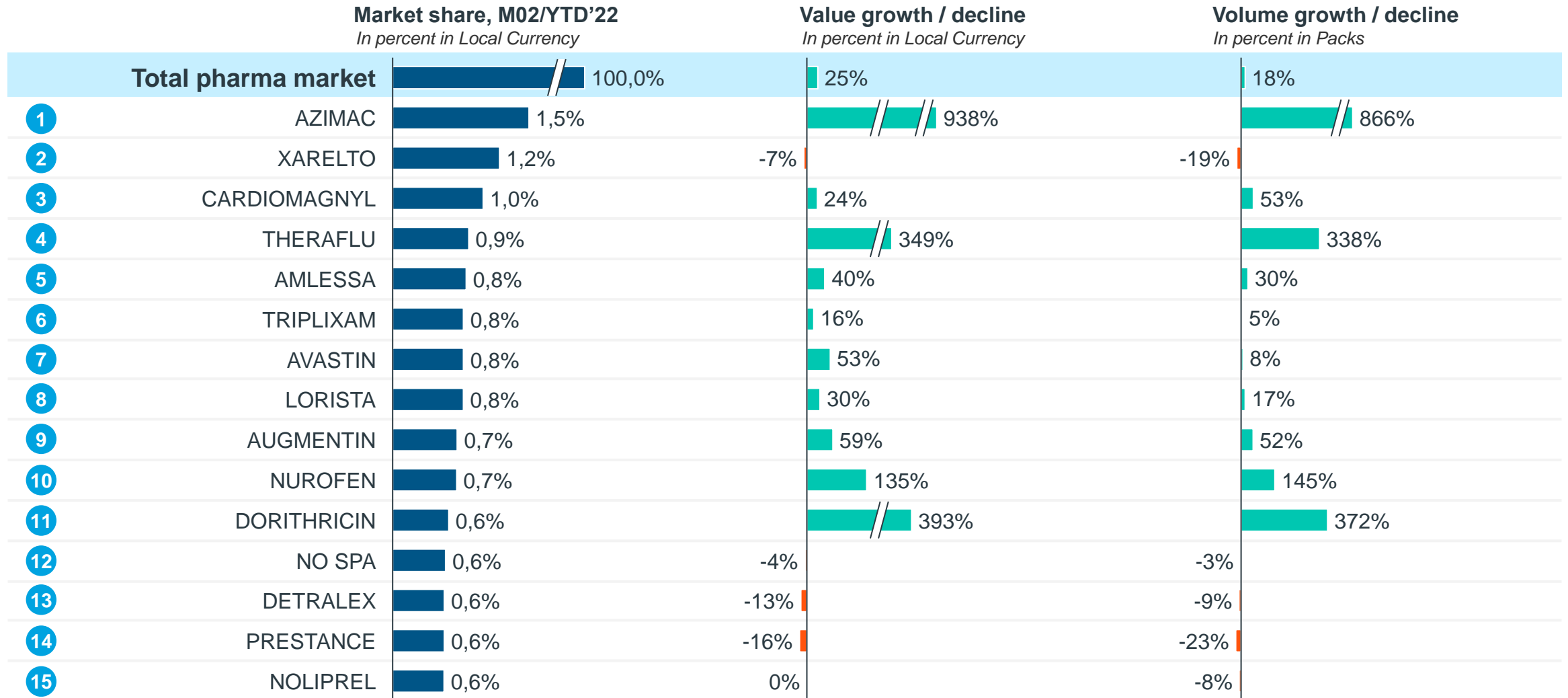


TOP-15 corporations on Georgia market, Feb 2022





TOP-15 brands on Georgia market, Feb 2022





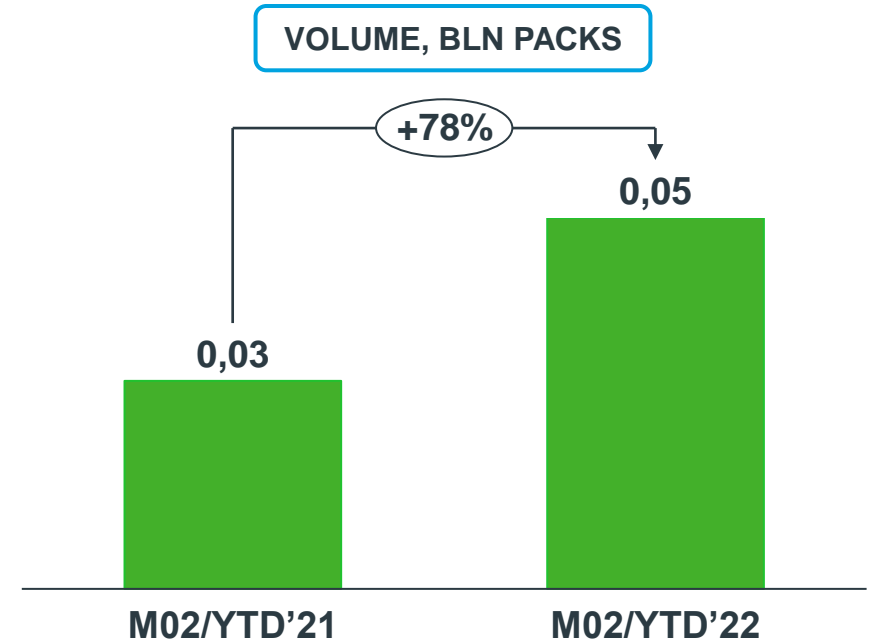
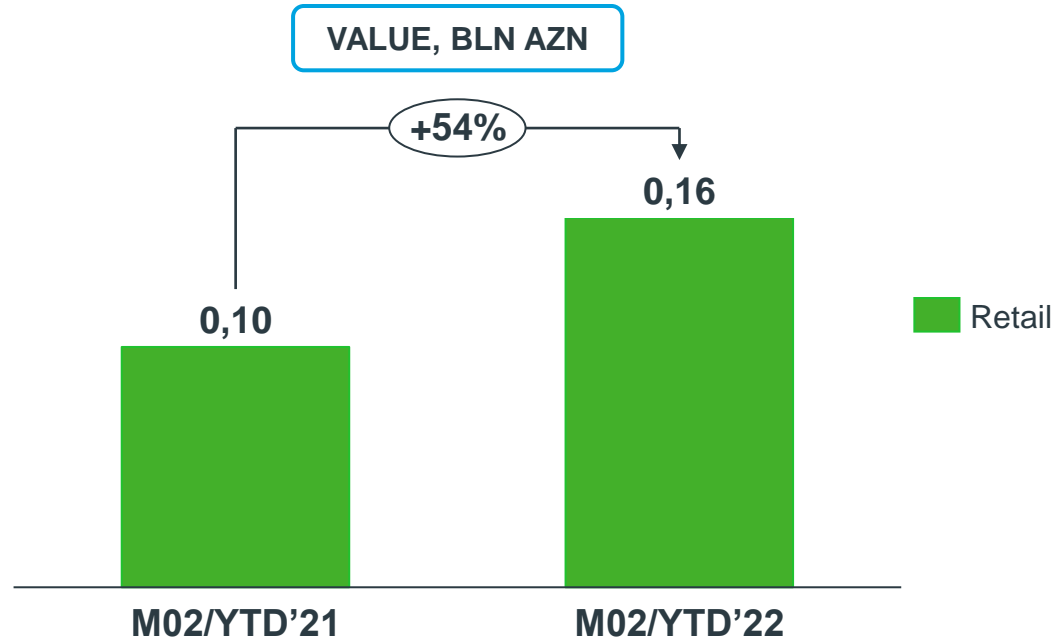
12,2%



INFLATION

Azerbaijan pharma market growth in Feb 2022

Market grew by 54% in value and 78% in volume



Indicator	AZN	USD	EUR	PACKS
Value M02/YTD'22, Bln.	0,16	0,09	0,08	0,05
Growth M02/YTD'22, %	▲ 54%	▲ 54%	▲ 65%	▲ 78%



TOP-15 corporations on Azerbaijan market, Feb 2022

		Market share, M02/YTD'22 <i>In percent in Local Currency</i>	Value growth / decline <i>In percent in Local Currency</i>	Volume growth / decline <i>In percent in Packs</i>
Total pharma market		100,0%	54%	78%
1	MENARINI	5,0%	87%	55%
2	SANOFI-AVENTIS	3,6%	37%	20%
3	STADA	3,2%	24%	81%
4	KRKA	3,0%	25%	23%
5	GLAXOSMITHKLINE	2,9%	130%	139%
6	NOVARTIS	2,0%	26%	28%
7	NOBEL ILAC SAN TUR	1,9%	36%	26%
8	SERVIER	1,8%	4%	1%
9	ESCOM NPK OAO	1,8%	486%	467%
10	MATERIA MEDICA	1,7%	750%	580%
11	RECKITT BENCKISER	1,6%	411%	359%
12	BORISOV.ZMP BEL	1,6%	95%	53%
13	ABDI IBRAHIM	1,6%	59%	50%
14	ABBOTT	1,5%	37%	15%
15	INFUSIA ZAO	1,5%	99%	329%



TOP-15 brands on Azerbaijan market, Feb 2022

		Market share, M02/YTD'22 <i>In percent in Local Currency</i>	Value growth / decline <i>In percent in Local Currency</i>	Volume growth / decline <i>In percent in Packs</i>
Total pharma market		100,0%	54%	78%
1	NIMESIL	2,9%	441%	441%
2	RINGER	2,2%	826%	812%
3	CLEXAN	1,6%	55%	-14%
4	NATRIUM CHLORIDUM	1,5%	258%	258%
5	COCARBOXYLASE	1,2%	432%	401%
6	CARDIOMAGNYL	1,2%	-10%	24%
7	ERGOFERON	1,2%	1000%	1000%
8	NUROFEN	1,0%	340%	298%
9	THERAFLU	1,0%	504%	432%
10	DEMOTON	0,8%	97%	84%
11	TYLOL	0,8%	90%	41%
12	ACIDUM ASCORBINICU	0,7%	667%	673%
13	AMLESSA	0,7%	13%	9%
14	LEVOFLOXACIN	0,7%	2%	2%
15	DEXAMETHASONE	0,6%	577%	386%

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