

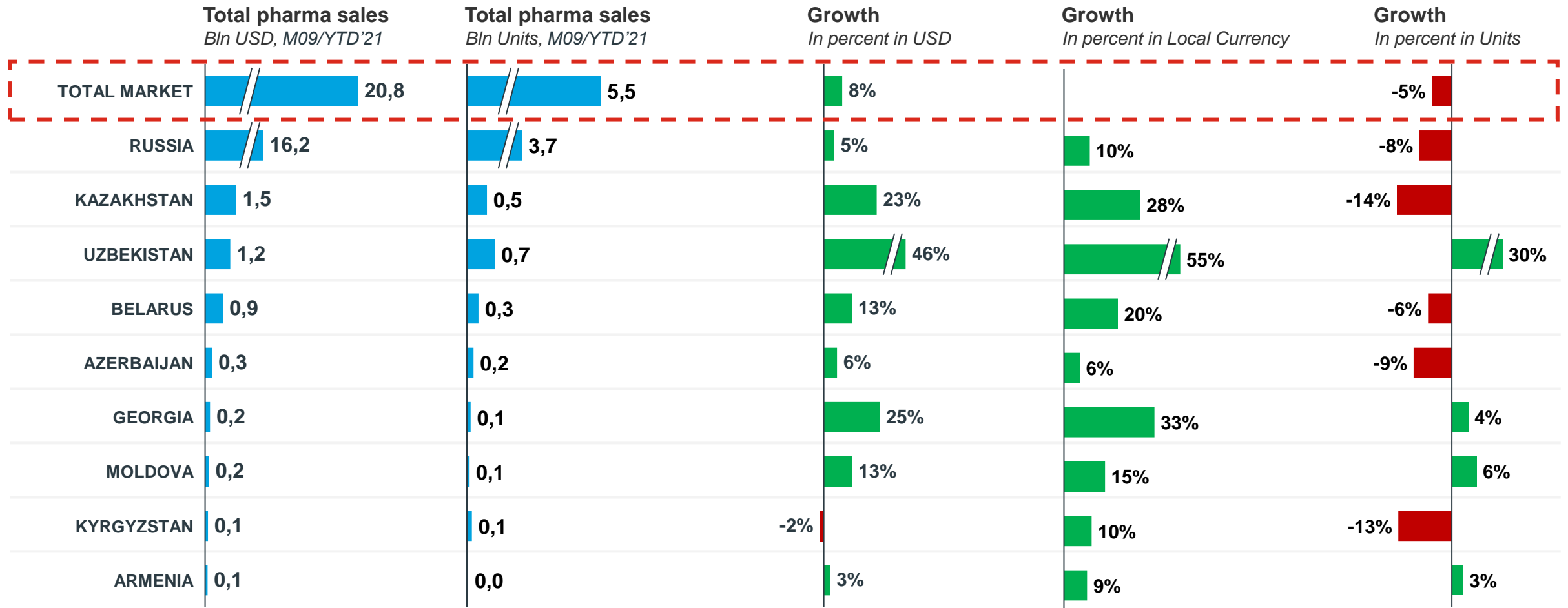


# Facts from IQVIA

M09 2021

# EAEU & CIS, Russia Countries ranking in Jan-Sep 2021, Total market, Value in Bln. USD and Units

Total Market grew by 8% in USD and declined by 5% in volume





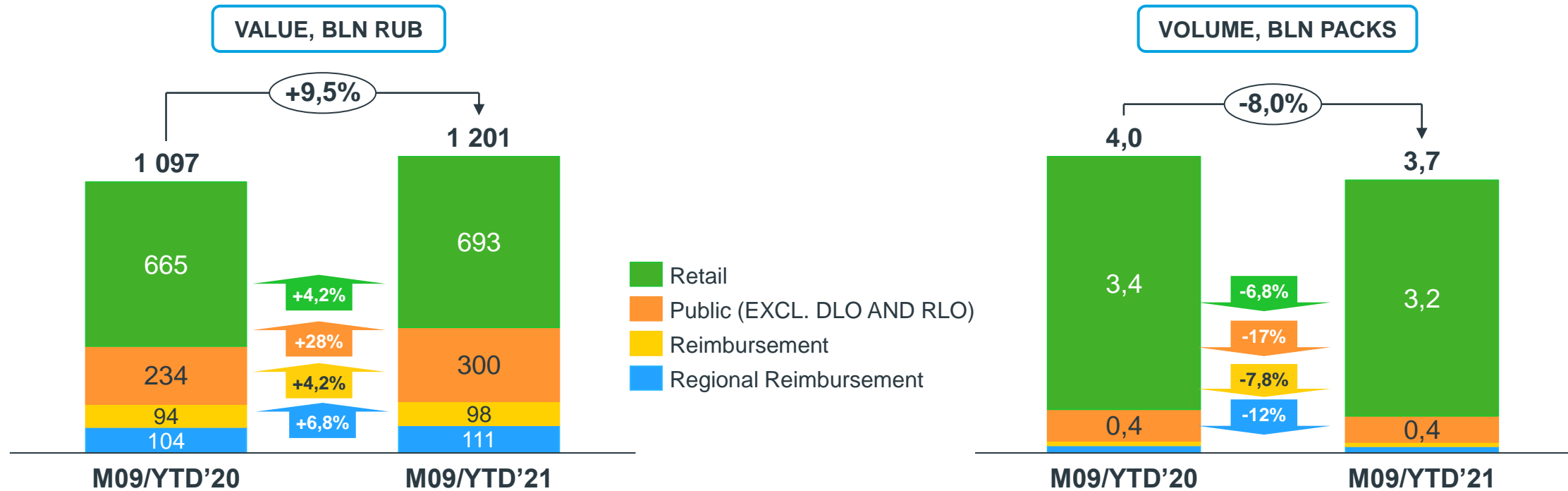
7,4%



INFLATION

# Russian pharma market growth in Jan-Sep 2021

Market grew by 9,5% in value and decreased by 8% in volume



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

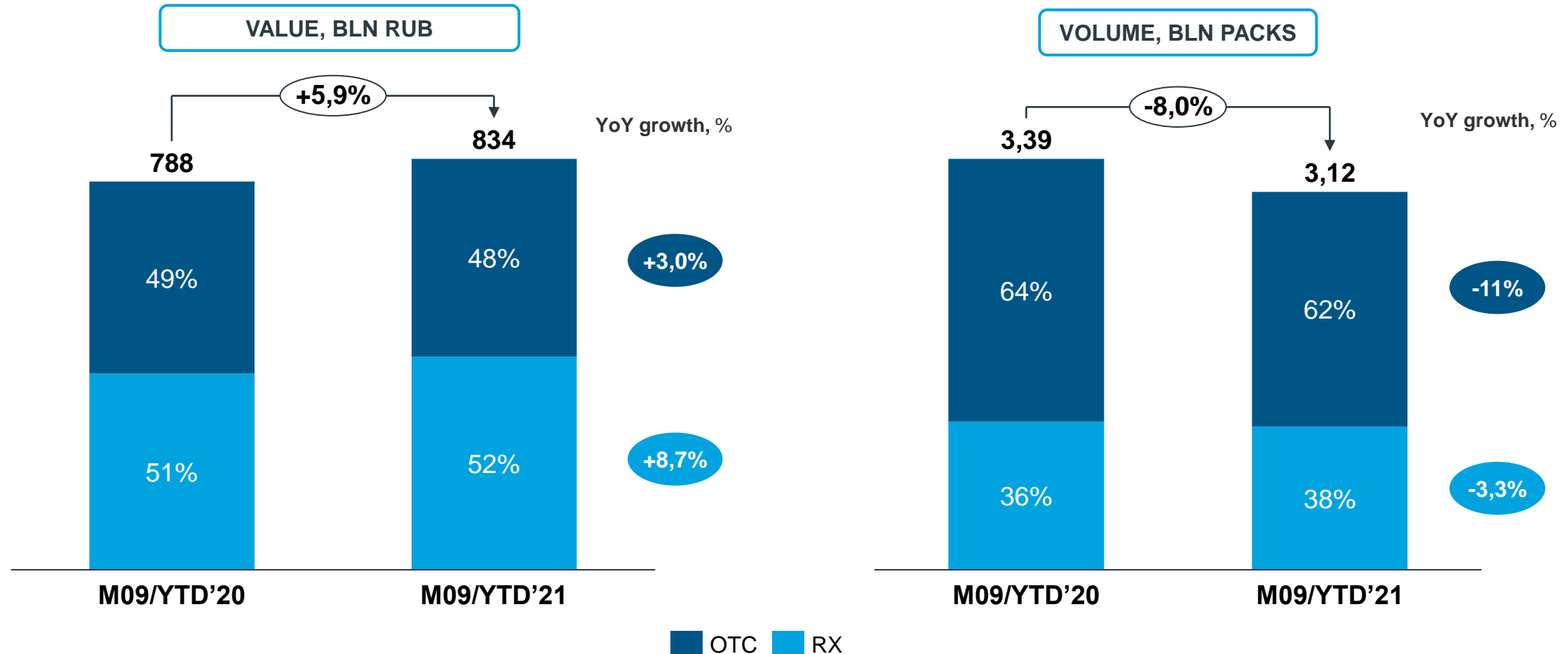
Indicator	RUB	USD	EUR	PACKS
Value M09/YTD'21, Bln.	1 201	16,2	13,6	3,7
Growth M09/YTD'21, %	▲ 9,5%	▲ 4,7%	▼ -1,8%	▼ -8,0%

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



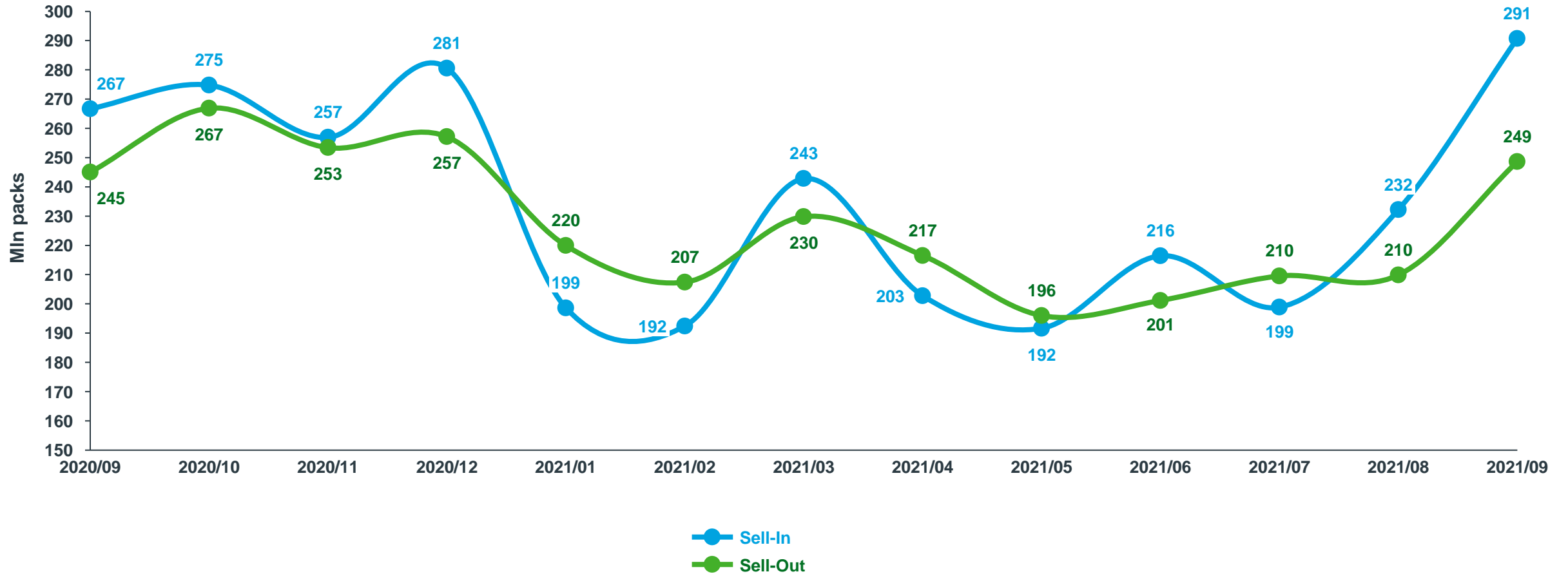
# Russian pharma market increase in Jan-Sep 2021

*Retail Sell-Out: Market grew by 5,9% in value and dropped by 8,0% in volume*



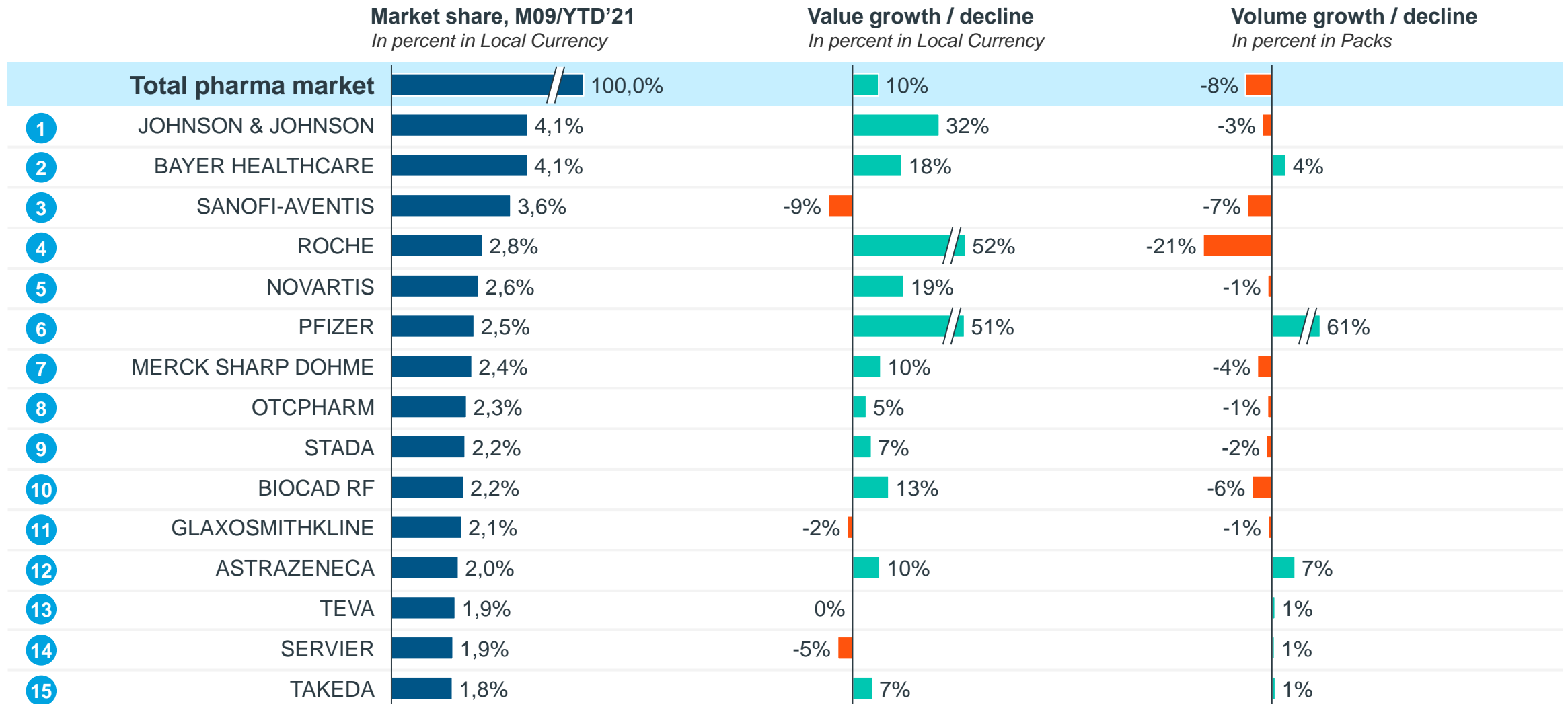


# Sell-In vs Sell-Out, OTC registered drugs





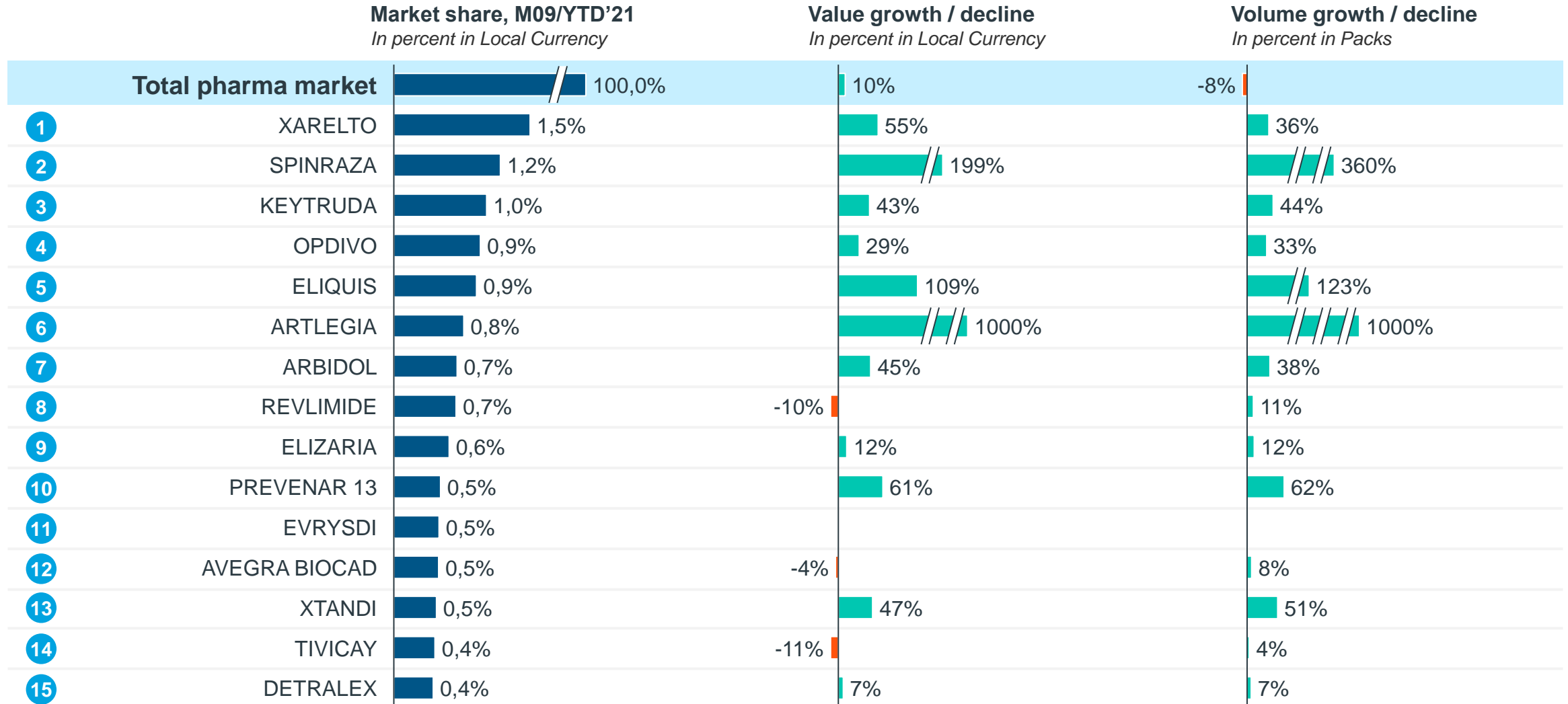
# TOP-15 corporations on Russian market, Jan-Sep 2021



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

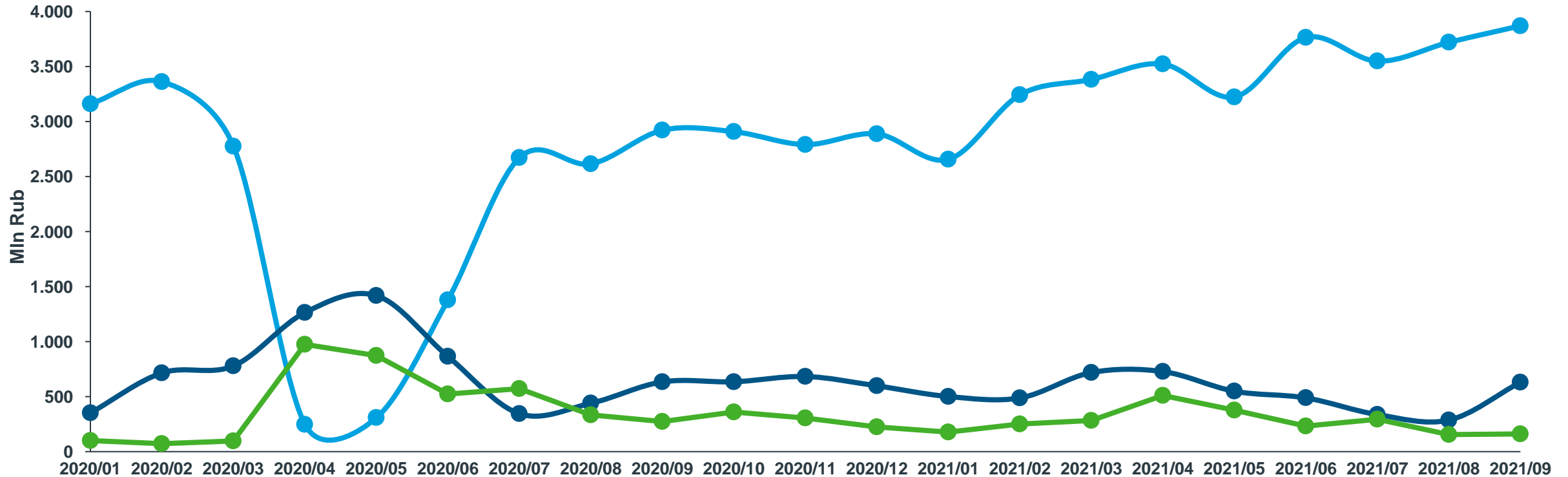


# TOP-15 brands on Russian market, Jan-Sep 2021



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

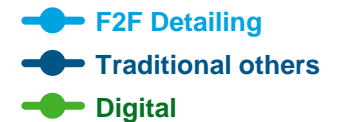
# Promotional interactions in value Rub by channel in Russia, Jan 2020-Sep 2021



**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.

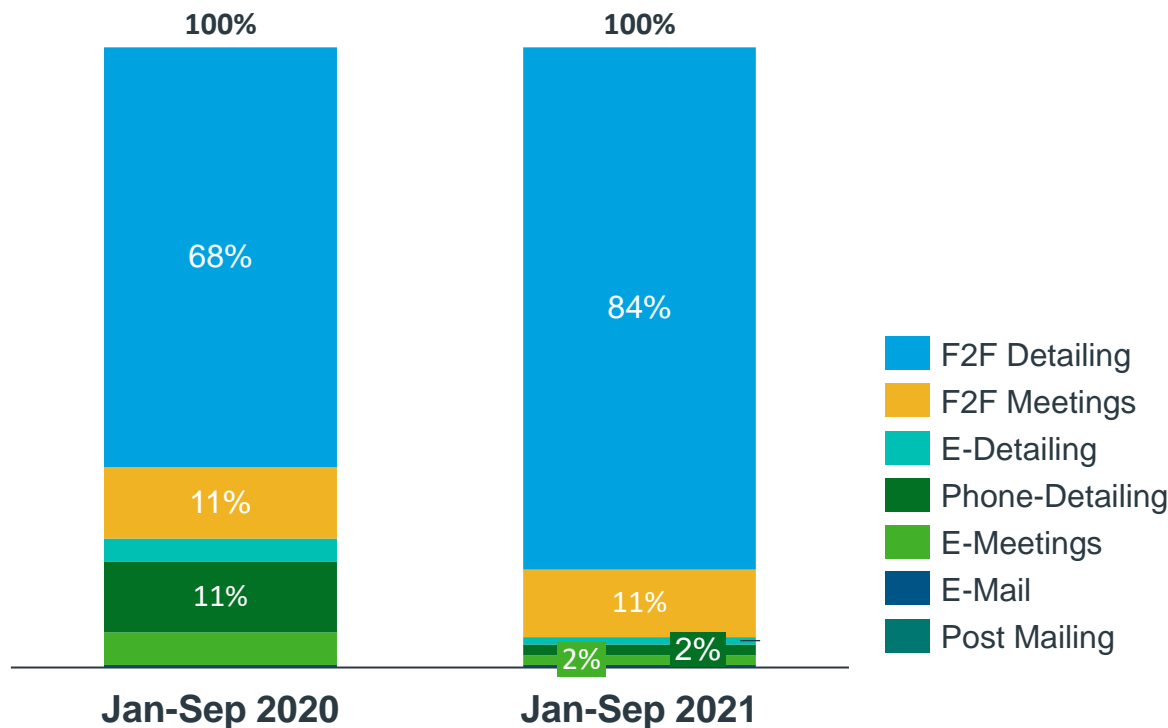




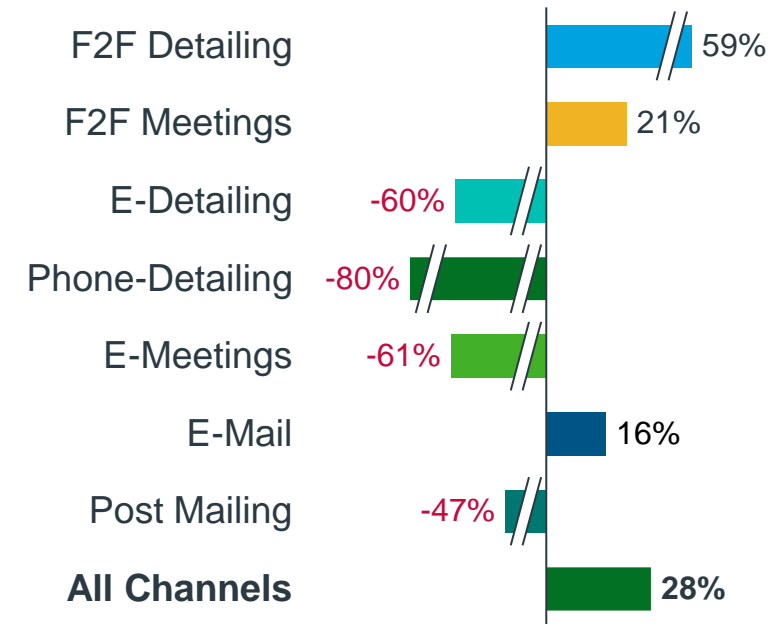
# Total Market overall promotional value in Rub increased by 28%, Jan-Sep 2021 vs 2020



Promotional value in Rub share by channel



% Changes in promotional value in Rub by channel Jan-Sep 2021 vs 2020



**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

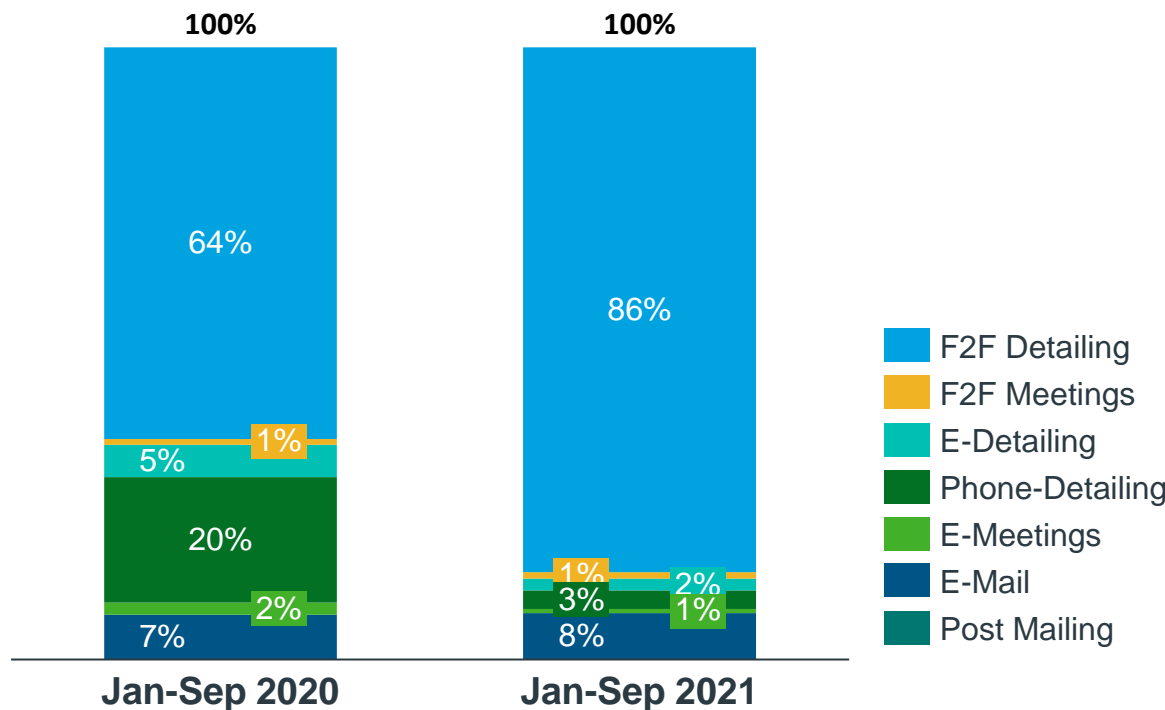
Value – a cost of each interaction projected on doctor’s universe

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.

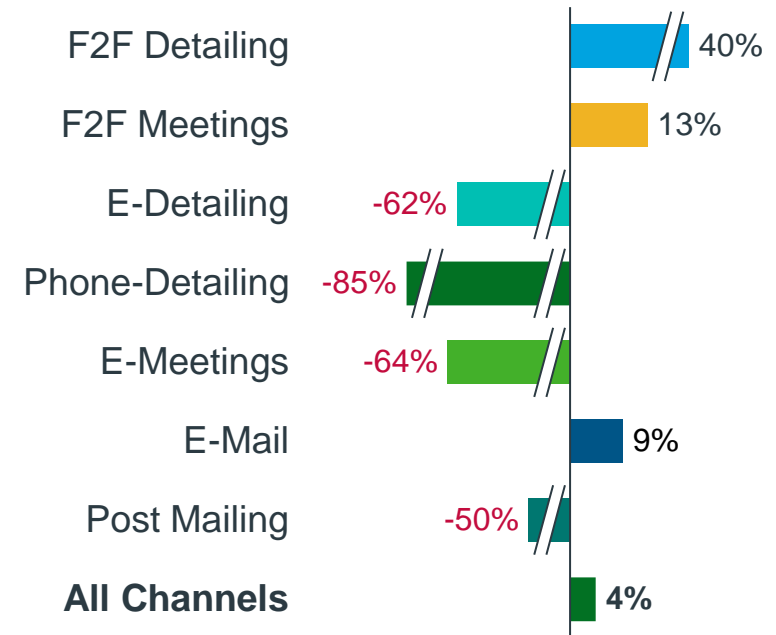
# Total Market overall promotional volume (contacts) increased by 4%, Jan-Sep 2021 vs 2020



Promotional value in Rub share by channel



% Changes in promotional volume (contacts) by channel Jan-Sep 2021 vs 2020



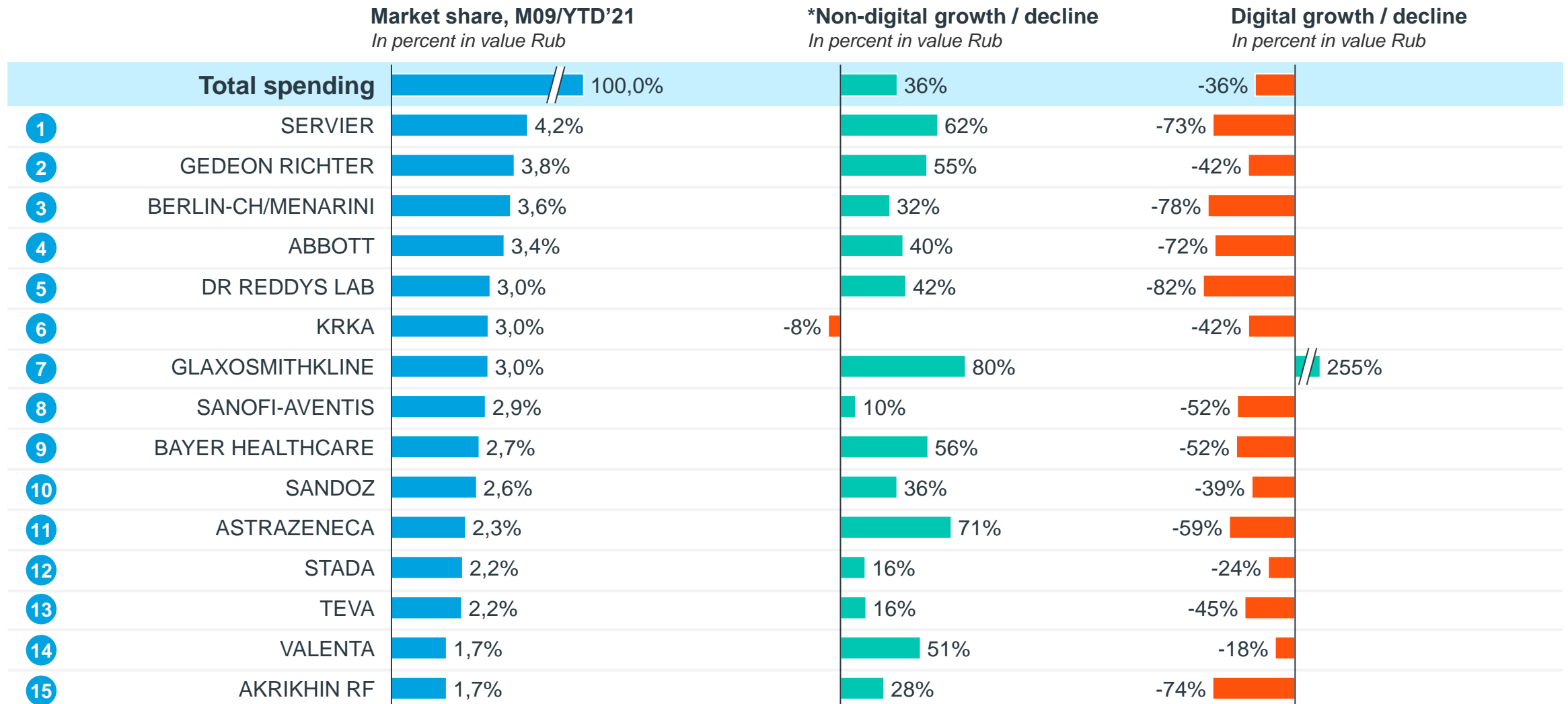
**F2F Detailing** – Reps visits. **Traditional others:** 1) F2F meetings – group meetings, round tables etc, 2) Phone Detailing – phone calls, 3) E-mail – communication via email. 4) Post Mailing – paper mails. **Digital:** 1) E-detailing – 1-1 calls visits using digitabl platforms 2) E-meetings – group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



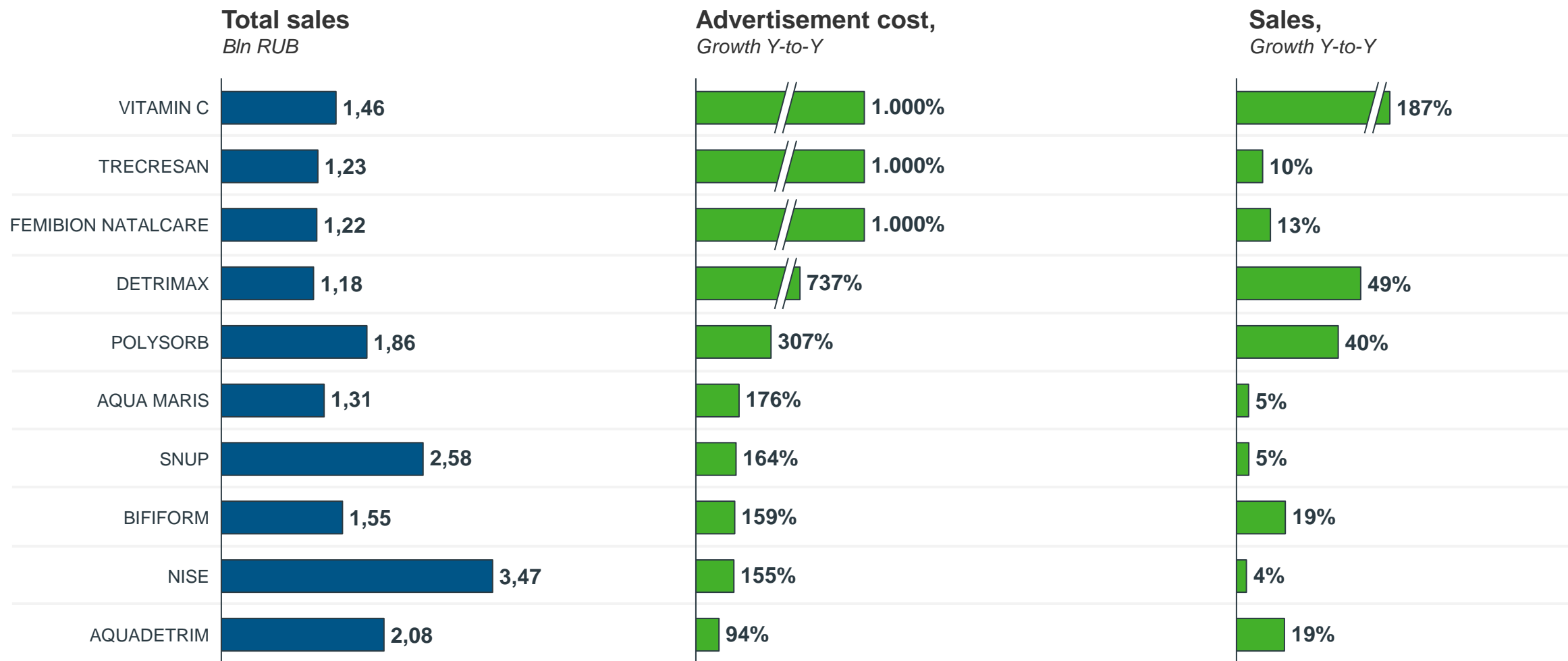
# TOP-15 corporations on promotional value in Rub, Jan-Sep 2021



\*Non-digital: F2F Detailing + Traditional others.

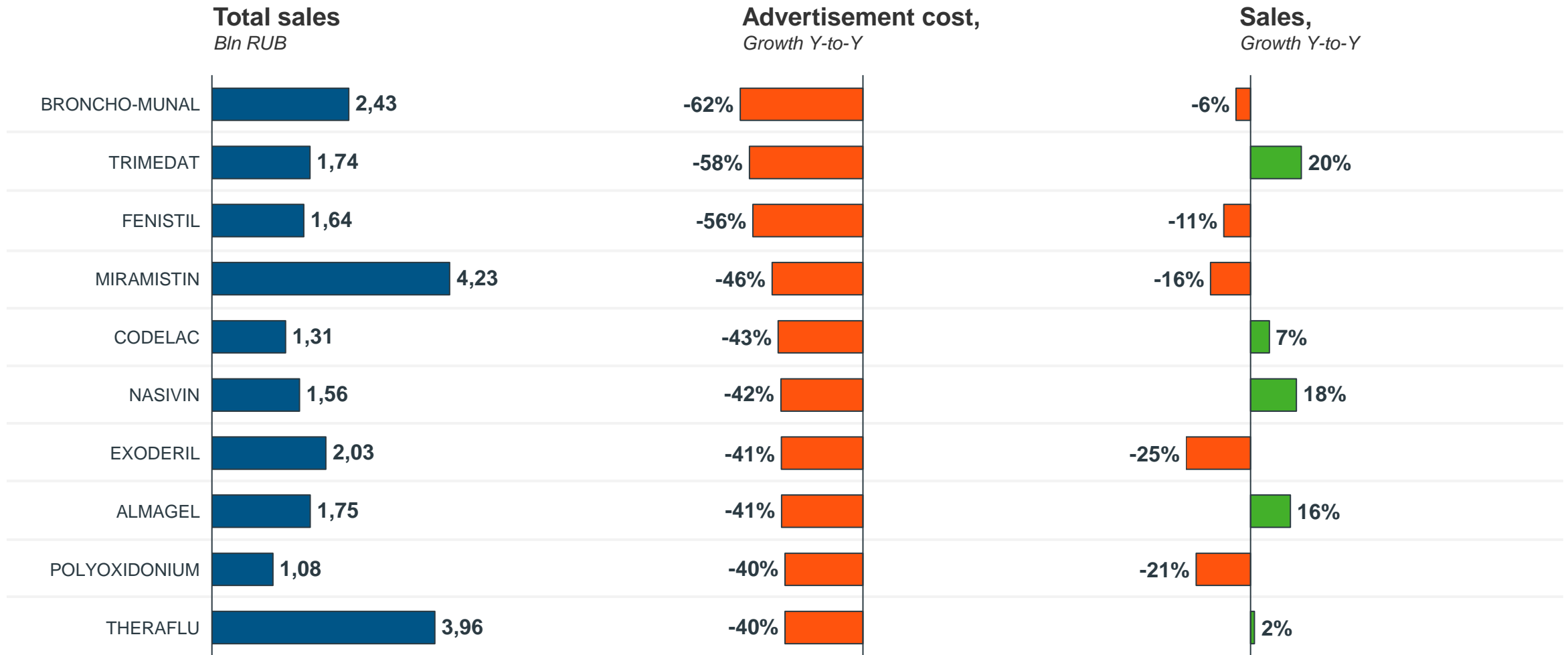
Source: IQVIA Russia, Channel Dynamics promo évaluation; Specialties: Allergology/Pulmonology, Cardiology, Dermatology, Diabetes, E.N.T., Gastroenterology, GPs, Gynecology, Neurology, Oncology, Pediatric, Pharma, Psychotherapy, Urology.

# TOP-10 products by growth in advertisement investments in Jan-Sep 2021



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 Jan-Sep 2021



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



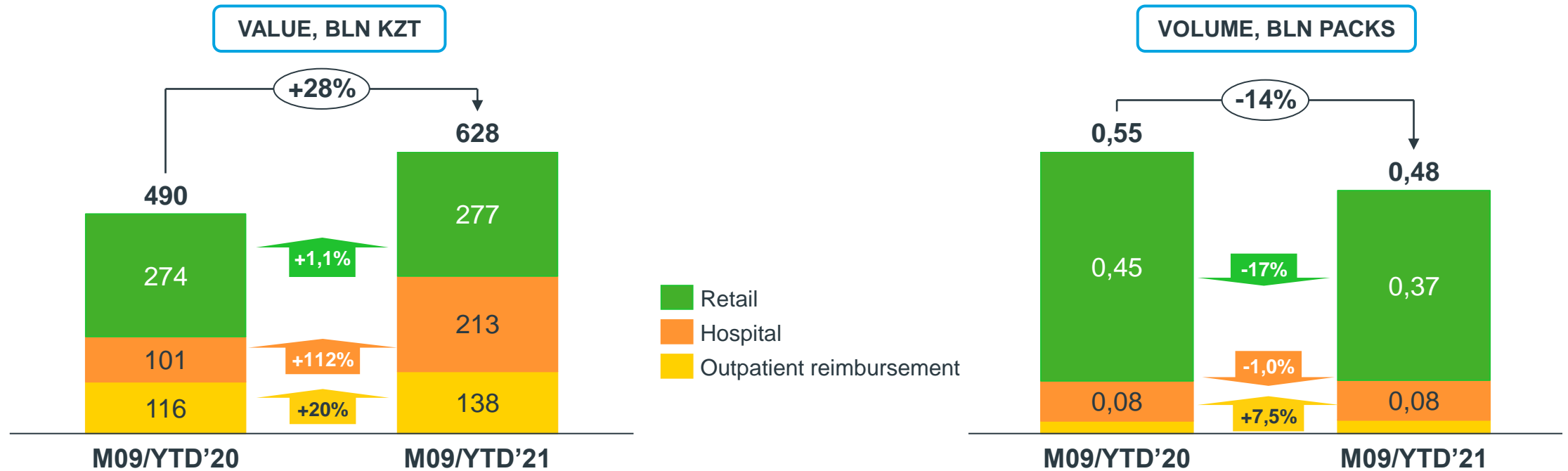
8,9%



INFLATION

# Kazakhstan pharma market growth in Jan-Sep 2021

Market grew by 28% in value and decreased by 14% in volume

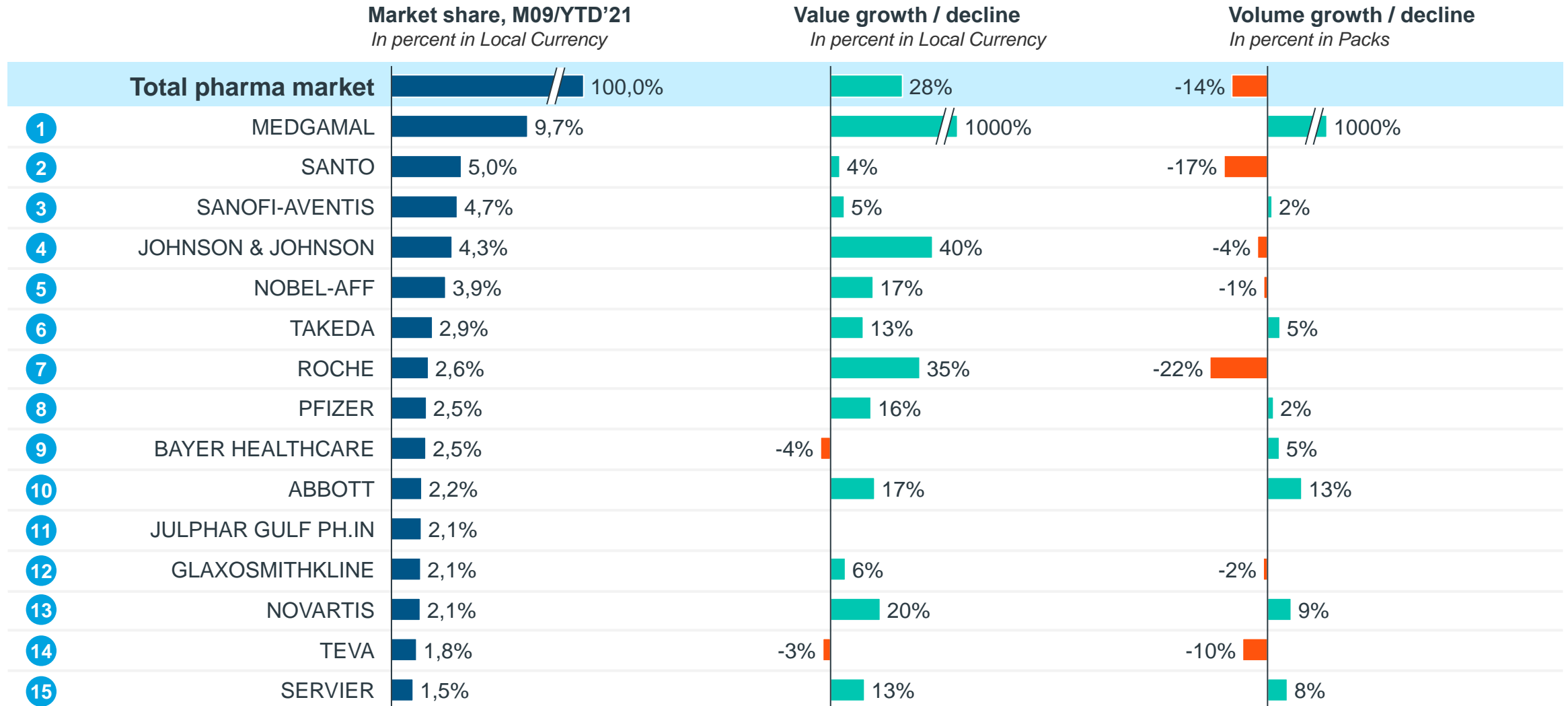


Indicator	KZT	USD	EUR	PACKS
Value M09/YTD'21, Bln.	628	1,48	1,24	0,48
Growth M09/YTD'21, %	▲ 28%	▲ 23%	▲ 16%	▼ -14%

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

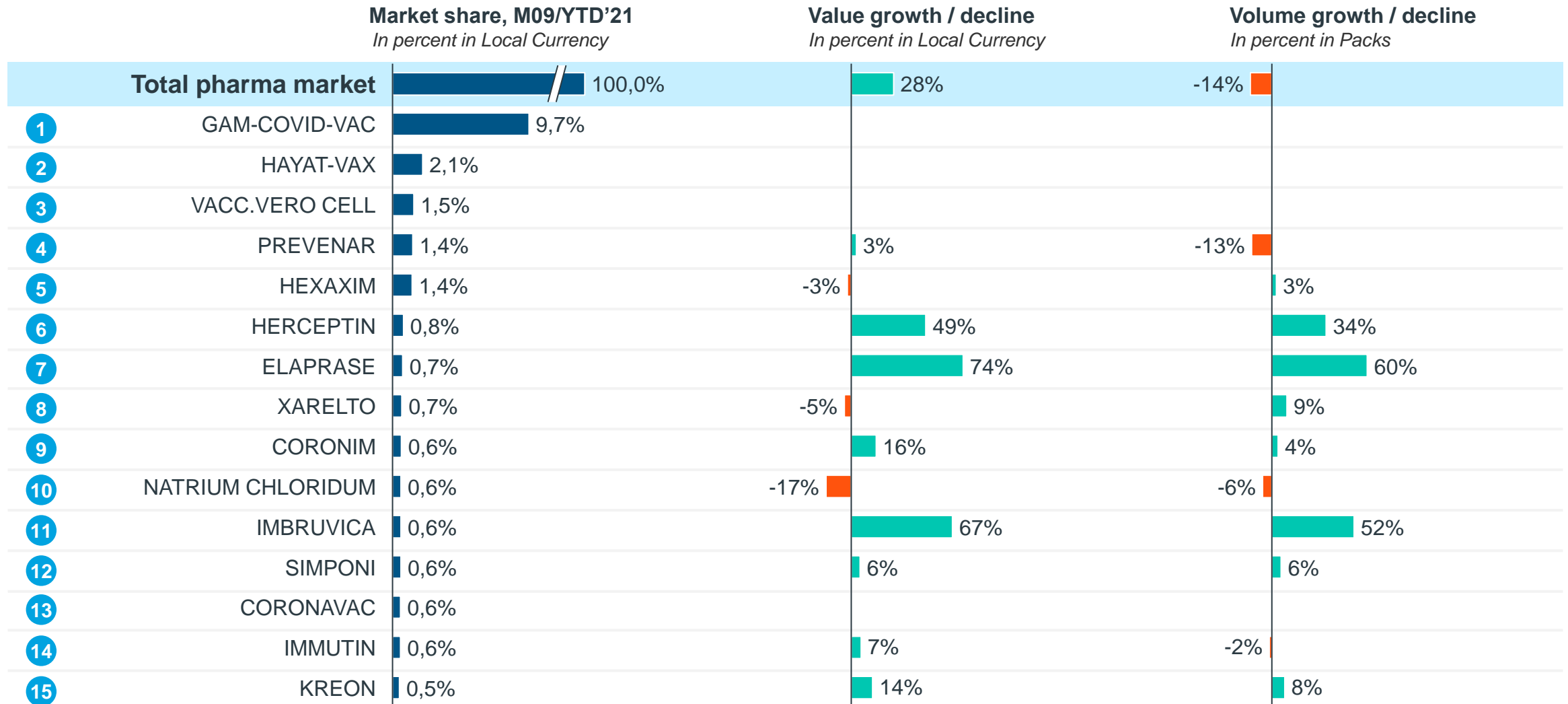


# TOP-15 corporations on Kazakhstan market, Jan-Sep 2021





# TOP-15 brands on Kazakhstan market, Jan-Sep 2021







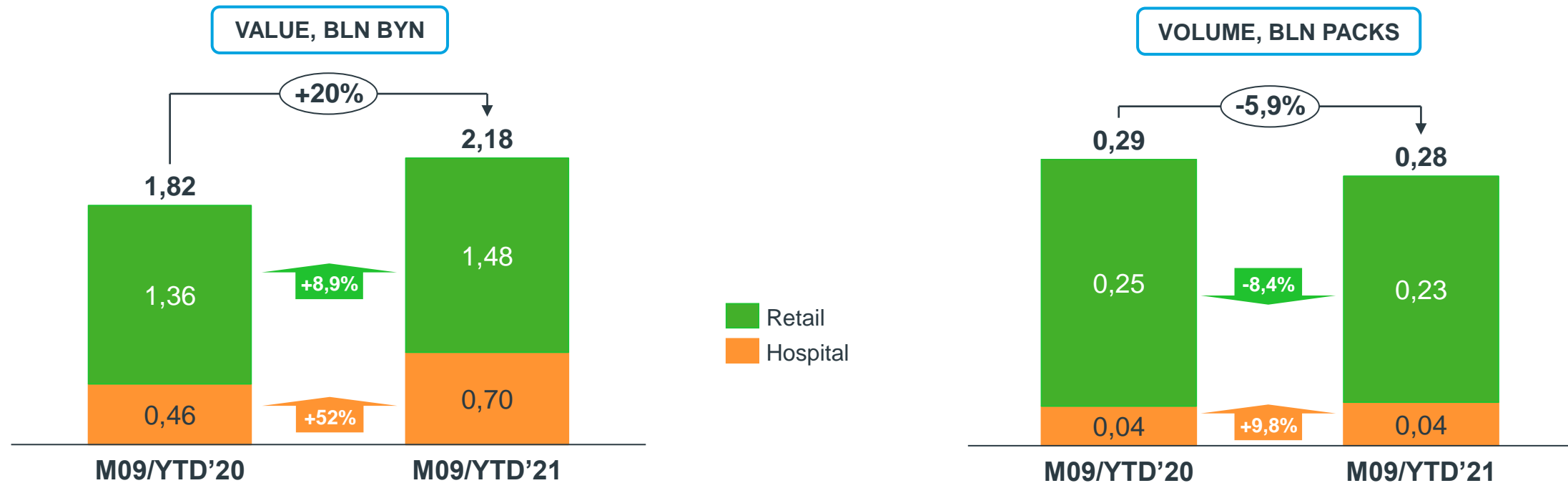
10,2%



INFLATION

# Belarus pharma market growth in Jan-Sep 2021

Market grew by 20% in value and decreased by 5,9% in volume

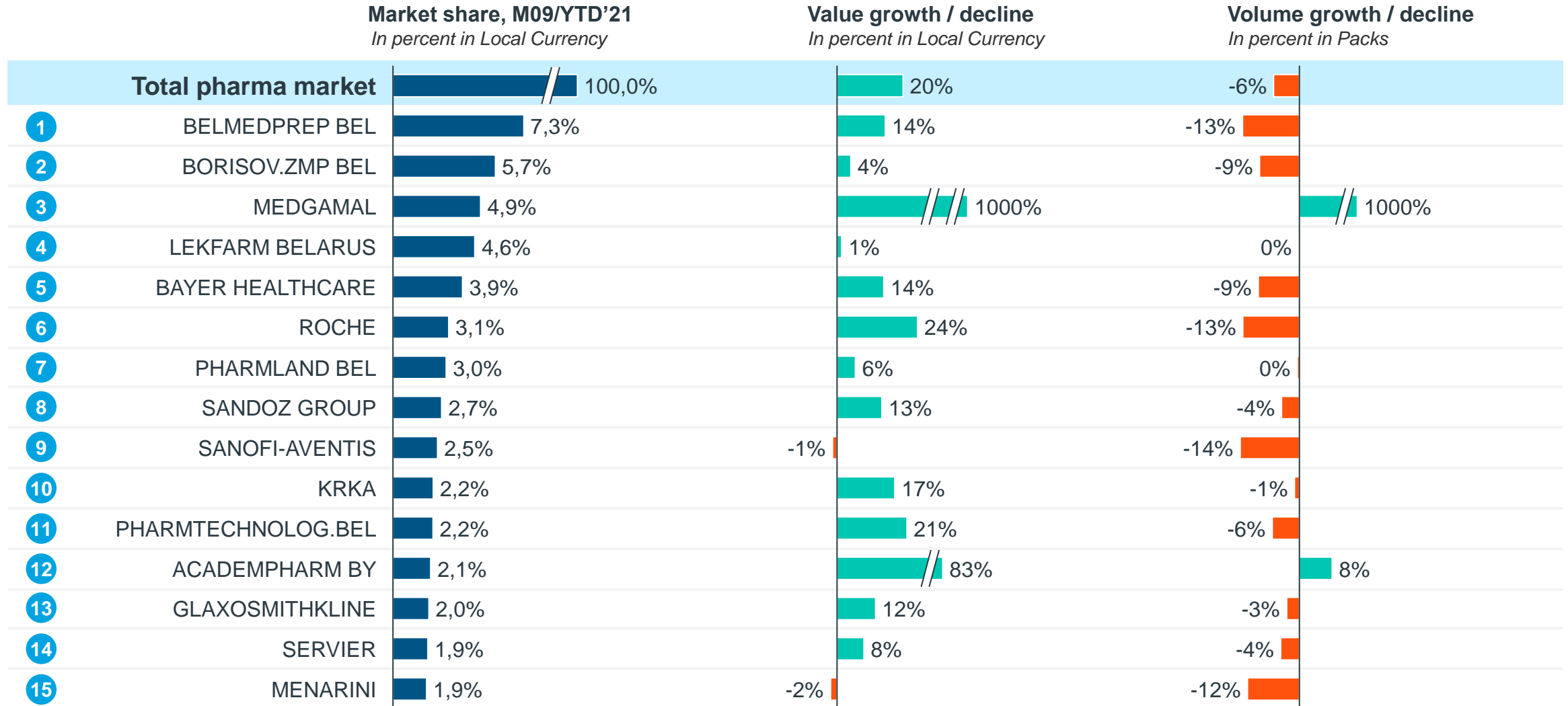


Indicator	BYN	USD	EUR	PACKS
Value M09/YTD'21, Bln.	2,18	0,86	0,72	0,28
Growth M09/YTD'21, %	▲ 20%	▲ 13%	▲ 5,6%	▼ -5,9%

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, Jan-Sep 2021



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



# TOP-15 brands on Belarus market, Jan-Sep 2021

	Market share, M09/YTD'21 <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>
<b>Total pharma market</b>	100,0%	20%	-6%
1 GAM-COVID-VAC	4,8%		
2 XARELTO	2,1%	39%	18%
3 VAC.BBIBP CORV	1,7%		
4 ACTEMRA	1,3%	511	247
5 NATRIUM CHLORIDUM	0,8%	33%	17%
6 RIVAXAN	0,8%	1000%	1000%
7 HEPARIN-BELMED	0,7%	275%	179%
8 PERJETA	0,7%	50%	32%
9 FRAXIPARINE	0,6%	62%	-2%
10 FRAGMIN	0,6%	169%	151%
11 AMLESSA	0,5%	31%	15%
12 KADCYLA	0,5%	57%	36%
13 ACC	0,5%	86%	54%
14 PROTAMIN-INSUL.	0,5%	16%	5%
15 SERETIDE	0,4%	41%	23%



10,8%



INFLATION

# Uzbekistan pharma market growth in Jan-Sep 2021

Market grew by 55% in value and by 30% in volume



Indicator	UZS	USD	EUR	PACKS
Value M09/YTD'21, Bln.	12 718	1,20	1,01	0,67
Growth M09/YTD'21, %	▲ 55%	▲ 46%	▲ 38%	▲ 30%



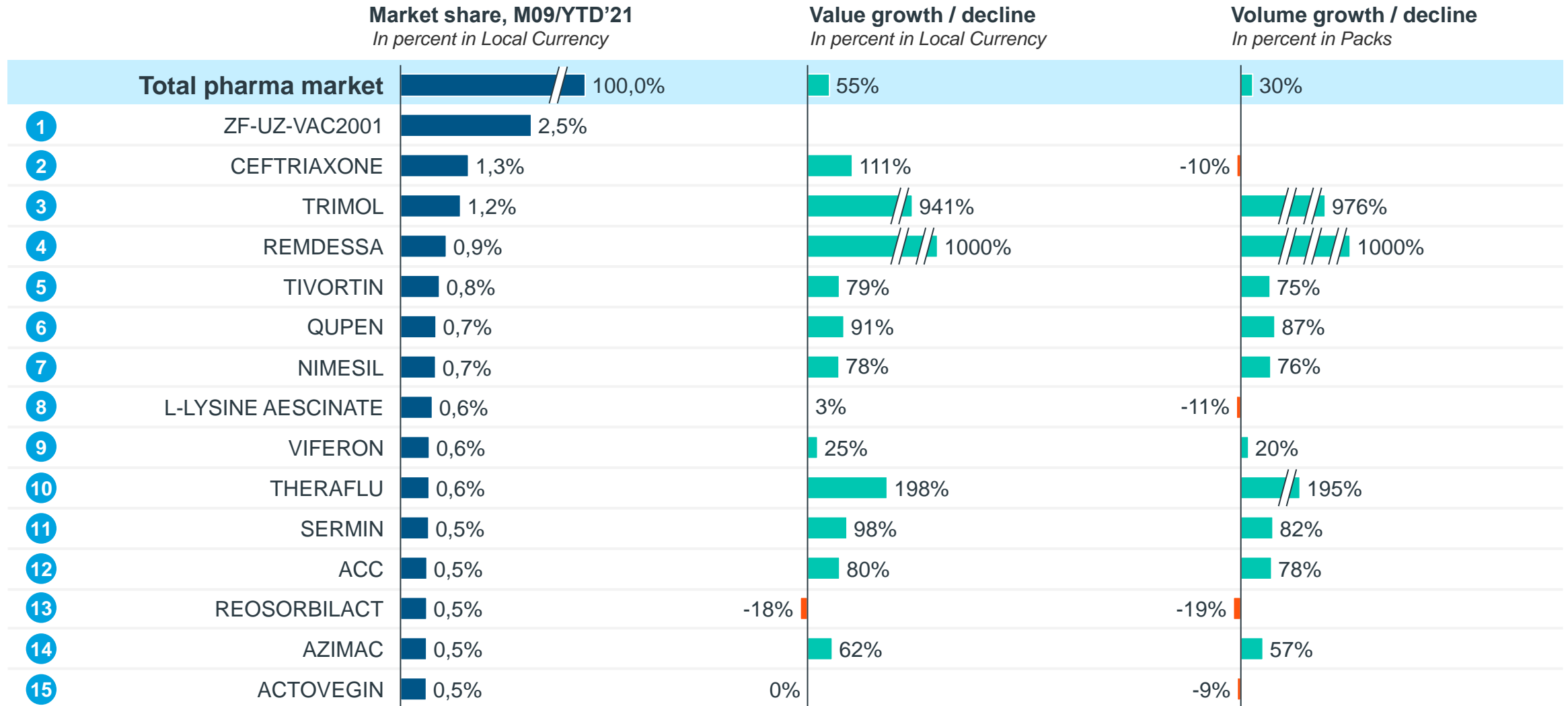
# TOP-15 corporations on Uzbekistan market, Jan-Sep 2021

		Market share, M09/YTD'21 <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>
<b>Total pharma market</b>		100,0%	55%	30%
1	KRKA	3,1%	44%	42%
2	MENARINI	2,7%	18%	3%
3	SANOFI-AVENTIS	2,7%	52%	56%
4	ANHUI ZHIFEI LONG.	2,5%		
5	NOVARTIS	2,4%	38%	12%
6	FARMAK KIEV	2,3%	35%	11%
7	ZHURABEK LAB	2,2%	44%	-11%
8	WORLD MEDICINE	2,1%	101%	84%
9	GM PHARMACEUTICALS	2,0%	68%	60%
10	YURIA-FARM UKR	1,9%	35%	20%
11	NIKA-PHARM	1,8%	85%	38%
12	ABBOTT	1,7%	17%	13%
13	NOBEL ILAC SAN TUR	1,6%	40%	17%
14	GEDEON RICHTER	1,6%	7%	3%
15	AJANTA PHARMA IND	1,4%	577%	564%

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, Jan-Sep 2021





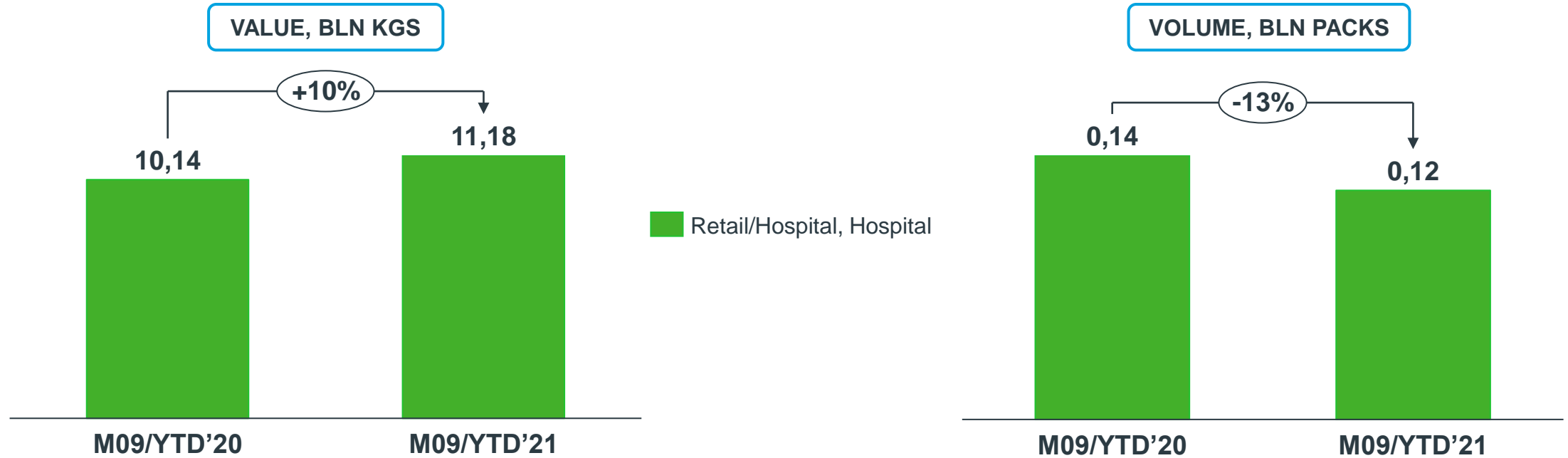
13,5%



INFLATION

# Kyrgyzstan pharma market growth in Jan-Sep 2021

Market grew by 10% in value and decreased by 13% in volume

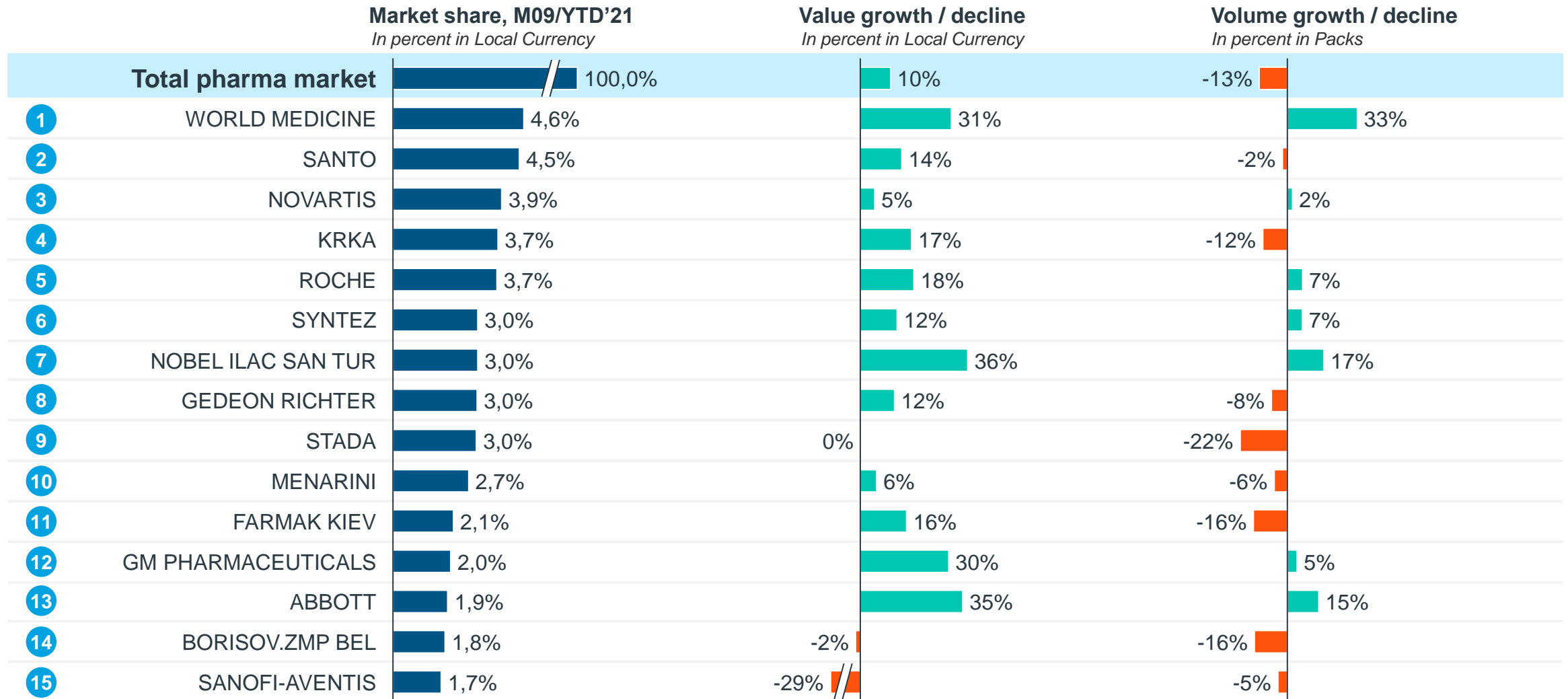


Indicator	KGS	USD	EUR	PACKS
Value M09/YTD'21, Bln.	11,2	0,13	0,11	0,12
Growth M09/YTD'21, %	▲ 10%	▼ -1,8%	▼ -7,4%	▼ -13%

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



# TOP-15 corporations on Kyrgyzstan market, Jan-Sep 2021

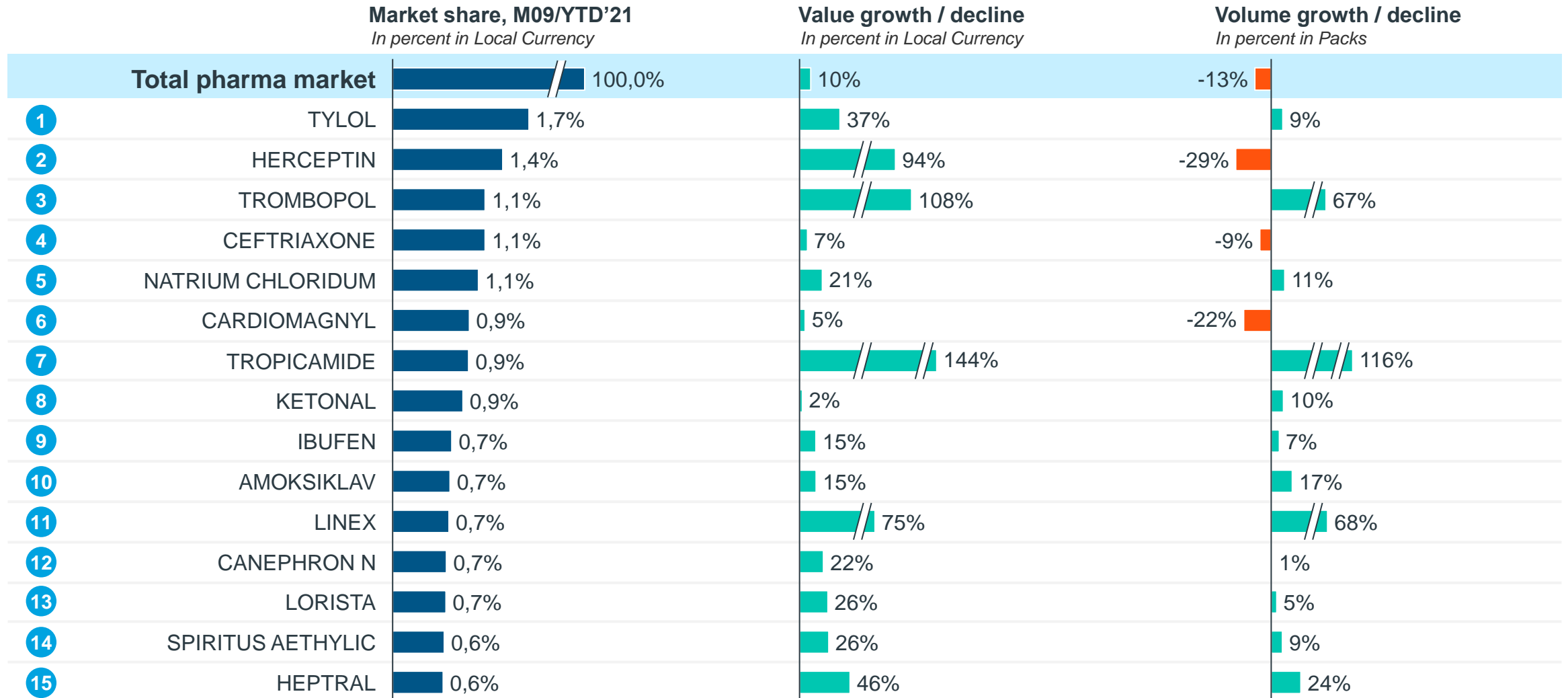


Source: IQVIA databases. Retail Market (exclude food supplements and diagnostic agents), TRD Prices





# TOP-15 brands on Kyrgyzstan market, Jan-Sep 2021



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

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