



Facts from IQVIA

M11 2021



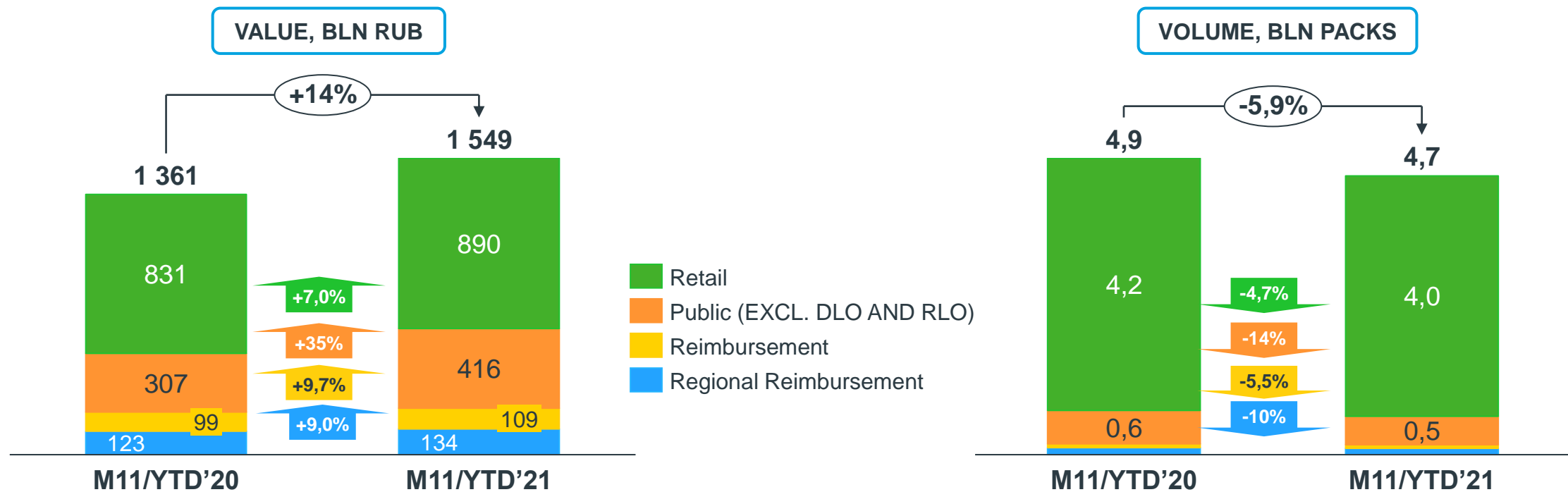
8,4%



INFLATION

Russian pharma market growth in Jan-Nov 2021

Market grew by 14% in value and decreased by 6% in volume



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

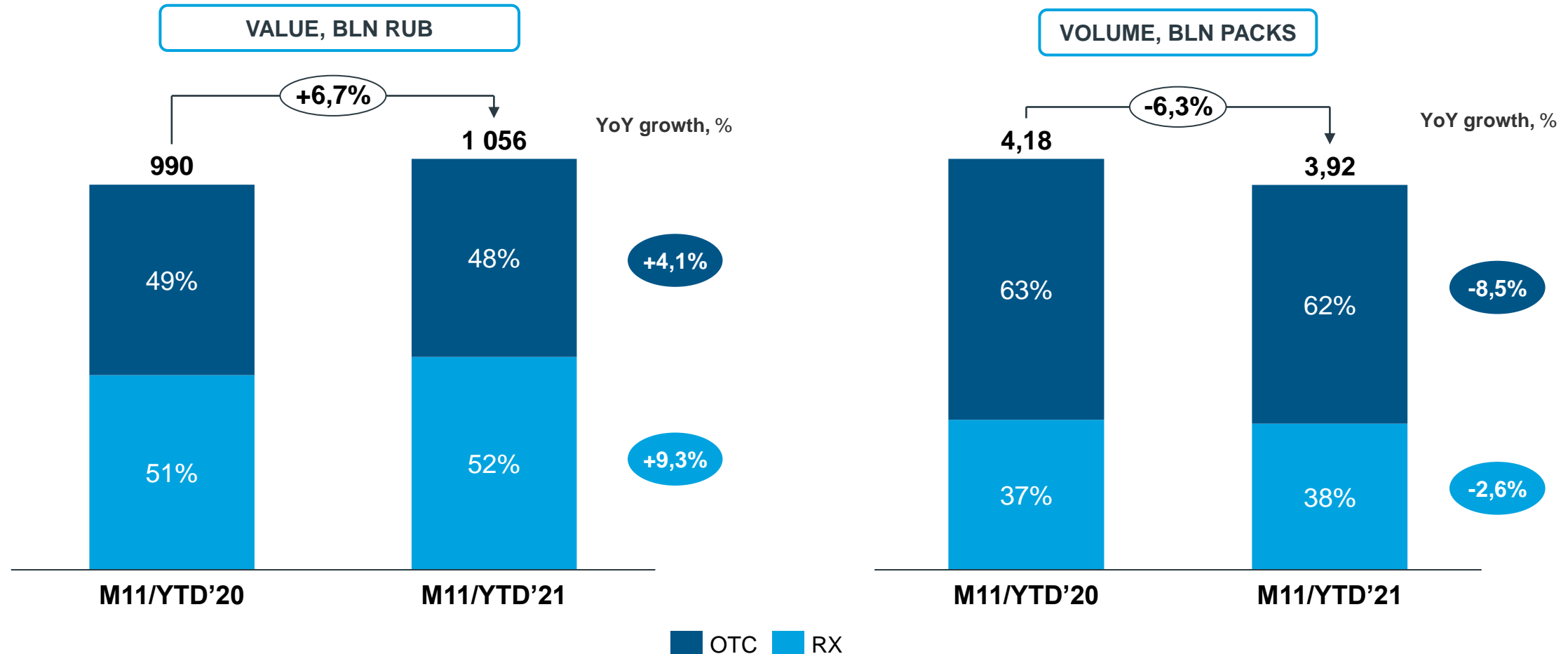
Indicator	RUB	USD	EUR	PACKS
Value M11/YTD'21, Bln.	1 549	21,1	17,8	4,7
Growth M11/YTD'21, %	▲ 14%	▲ 11%	▲ 6,4%	▼ -5,9%

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



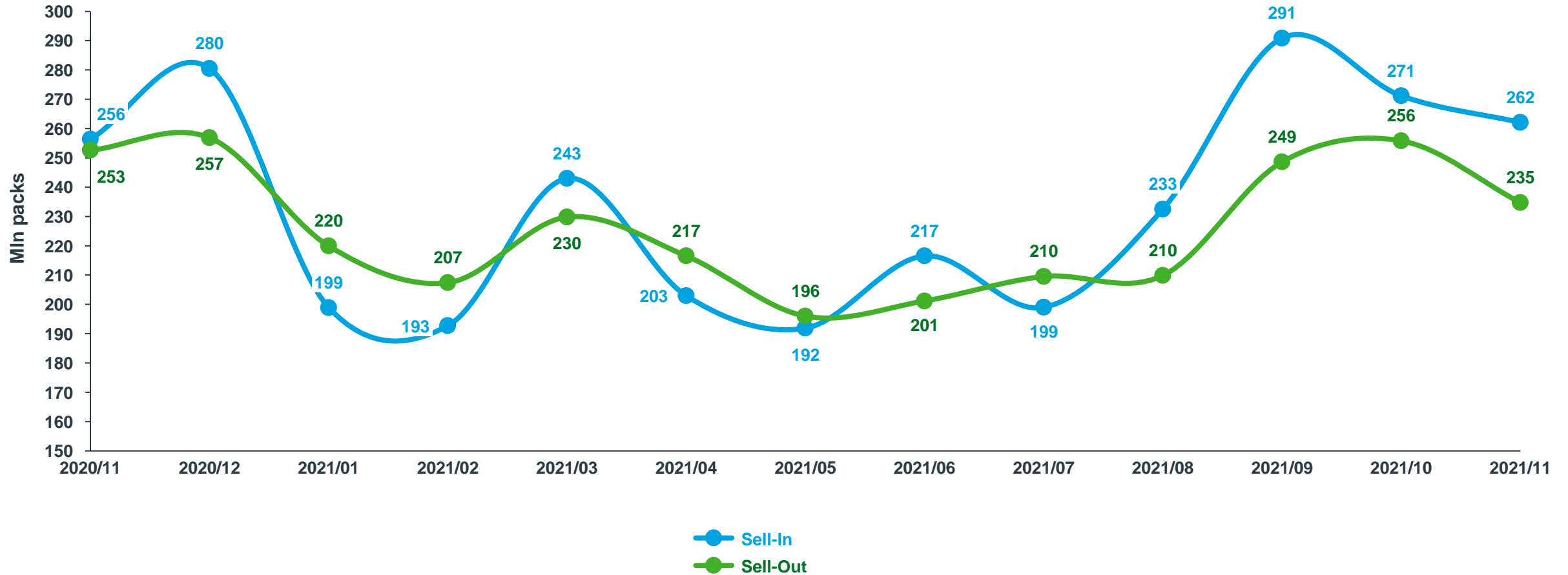
Russian pharma market increase in Jan-Nov 2021

Retail Sell-Out: Market grew by 6,7% in value and dropped by 6,3% in volume



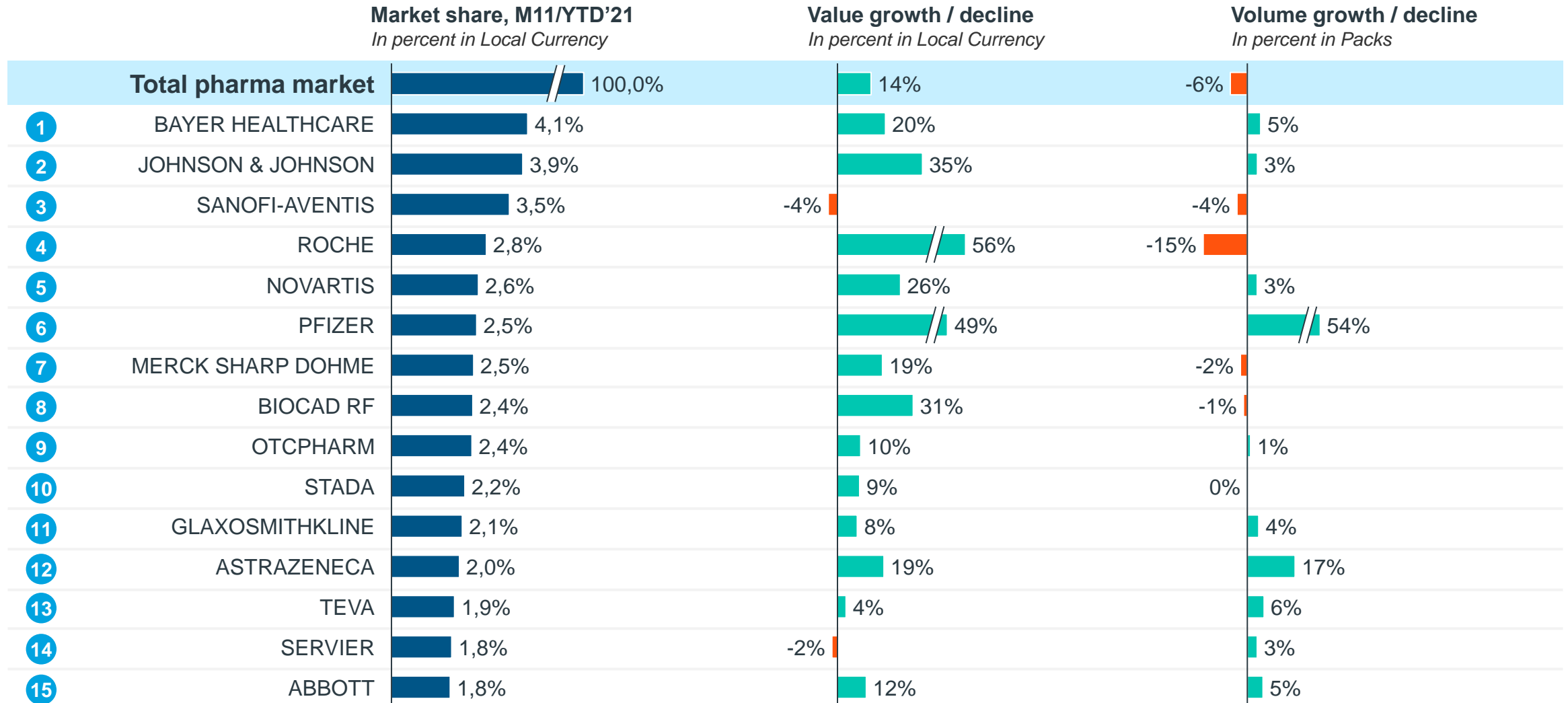


Sell-In vs Sell-Out, OTC registered drugs





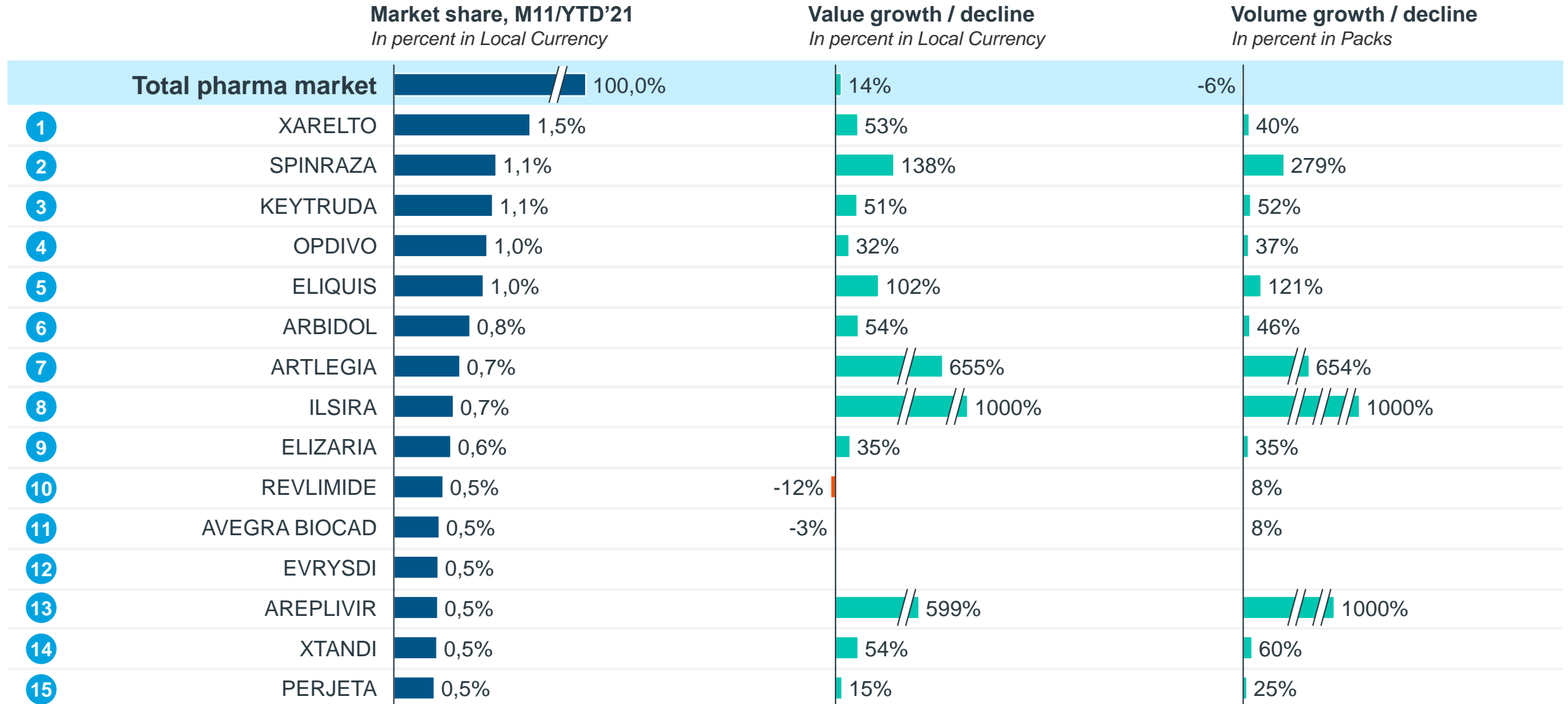
TOP-15 corporations on Russian market, Jan-Nov 2021



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

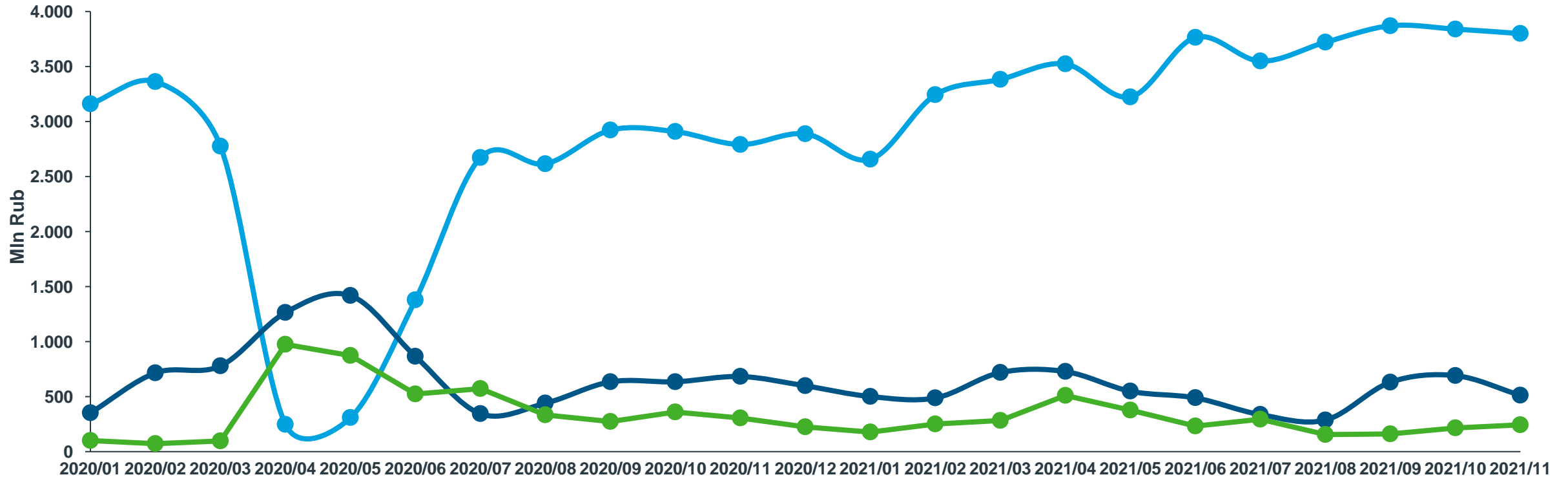


TOP-15 brands on Russian market, Jan-Nov 2021



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

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

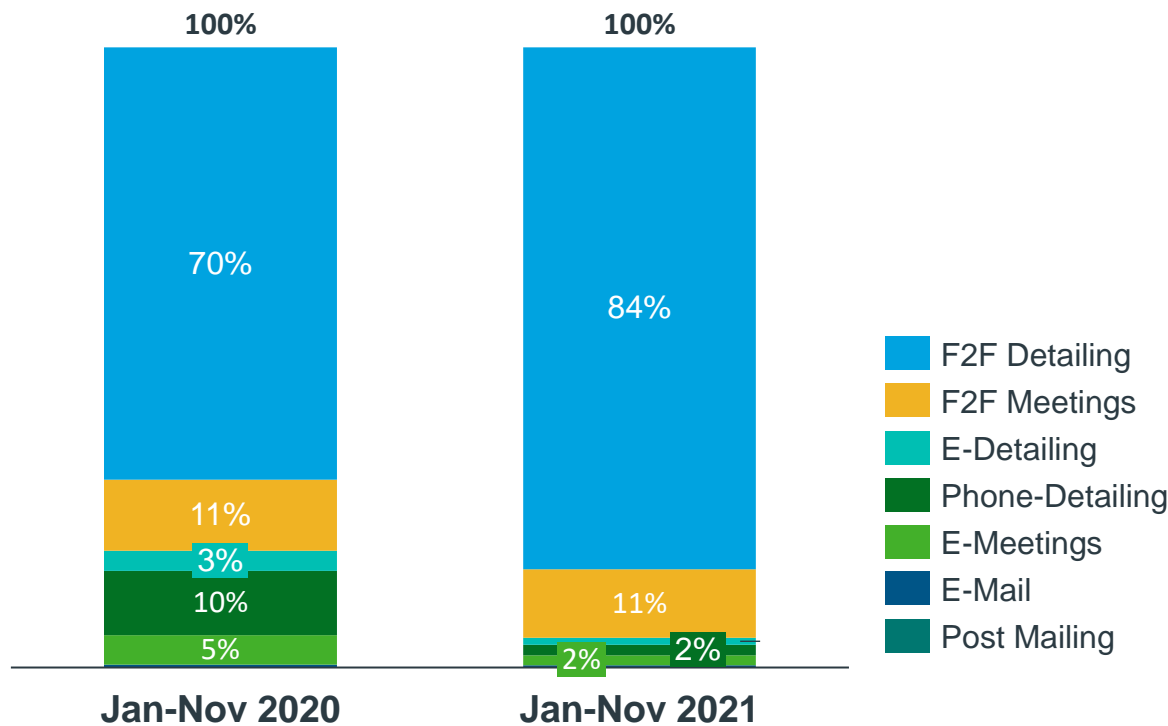
Source: IQVIA Russia, Channel Dynamics promo évaluation; Specialties: Allergology/Pulmonology, Cardiology, Dermatology, Diabetes, E.N.T., Gastroenterology, GPs, Gynecology, Neurology, Oncology, Pediatric, Pharma, Psychotherapy, Urology.

- F2F Detailing
- Traditional others
- Digital

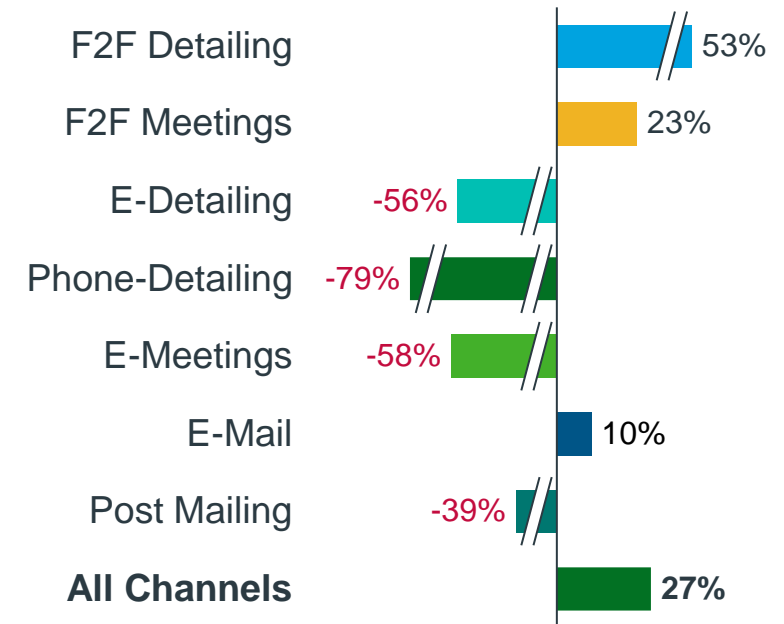
Total Market overall promotional value in Rub increased by 27%, Jan-Nov 2021 vs 2020



Promotional value in Rub share by channel



% Changes in promotional value in Rub by channel Jan-Nov 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

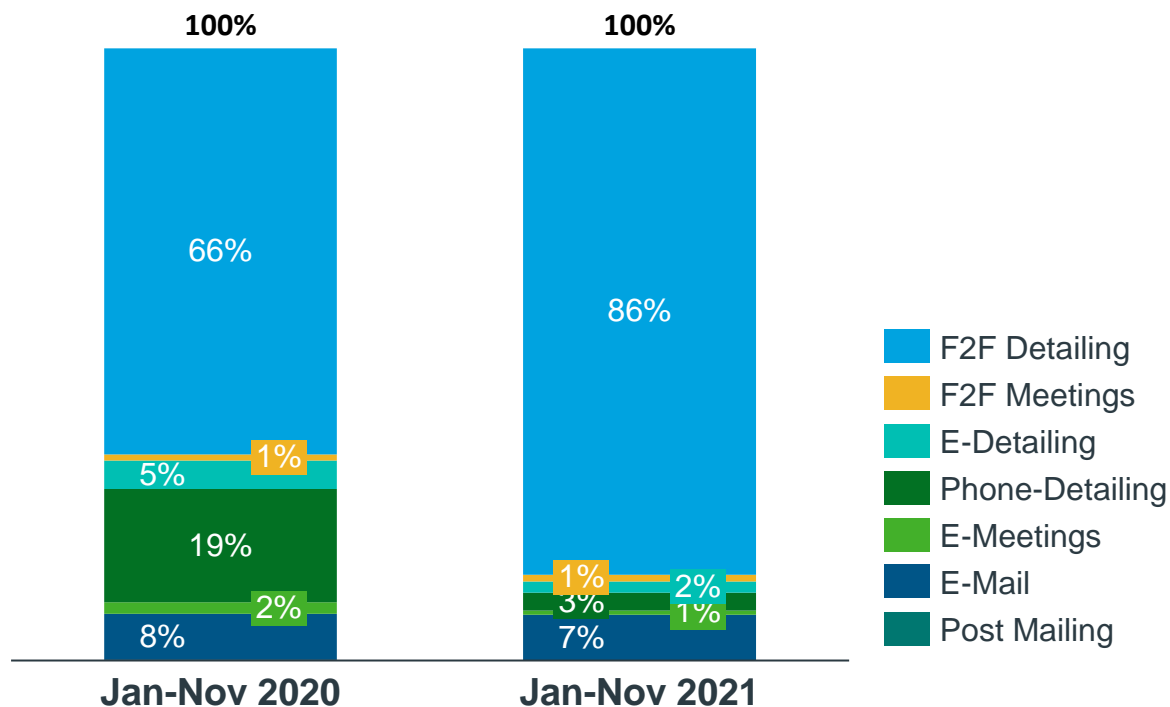
Value – a cost of each interaction projected on doctor’s universe

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.

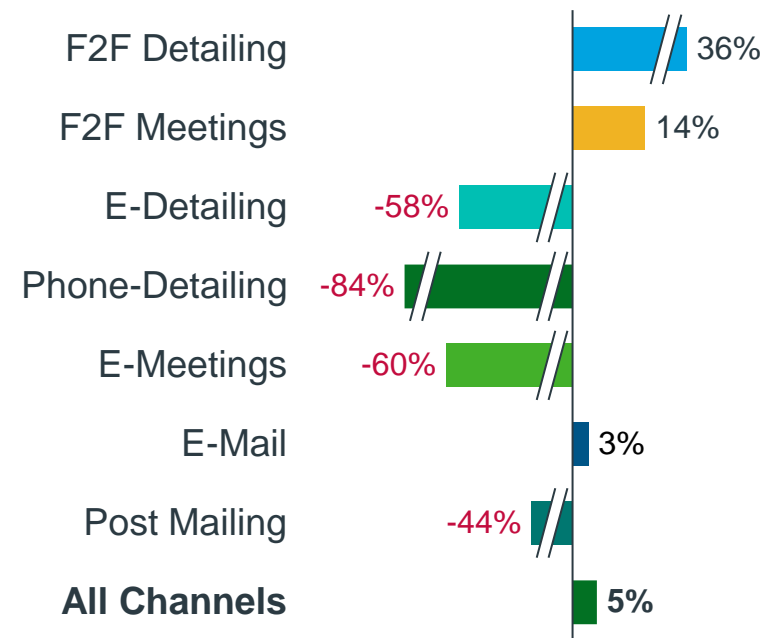
Total Market overall promotional volume (contacts) increased by 5%, Jan-Nov 2021 vs 2020



Promotional value in Rub share by channel



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



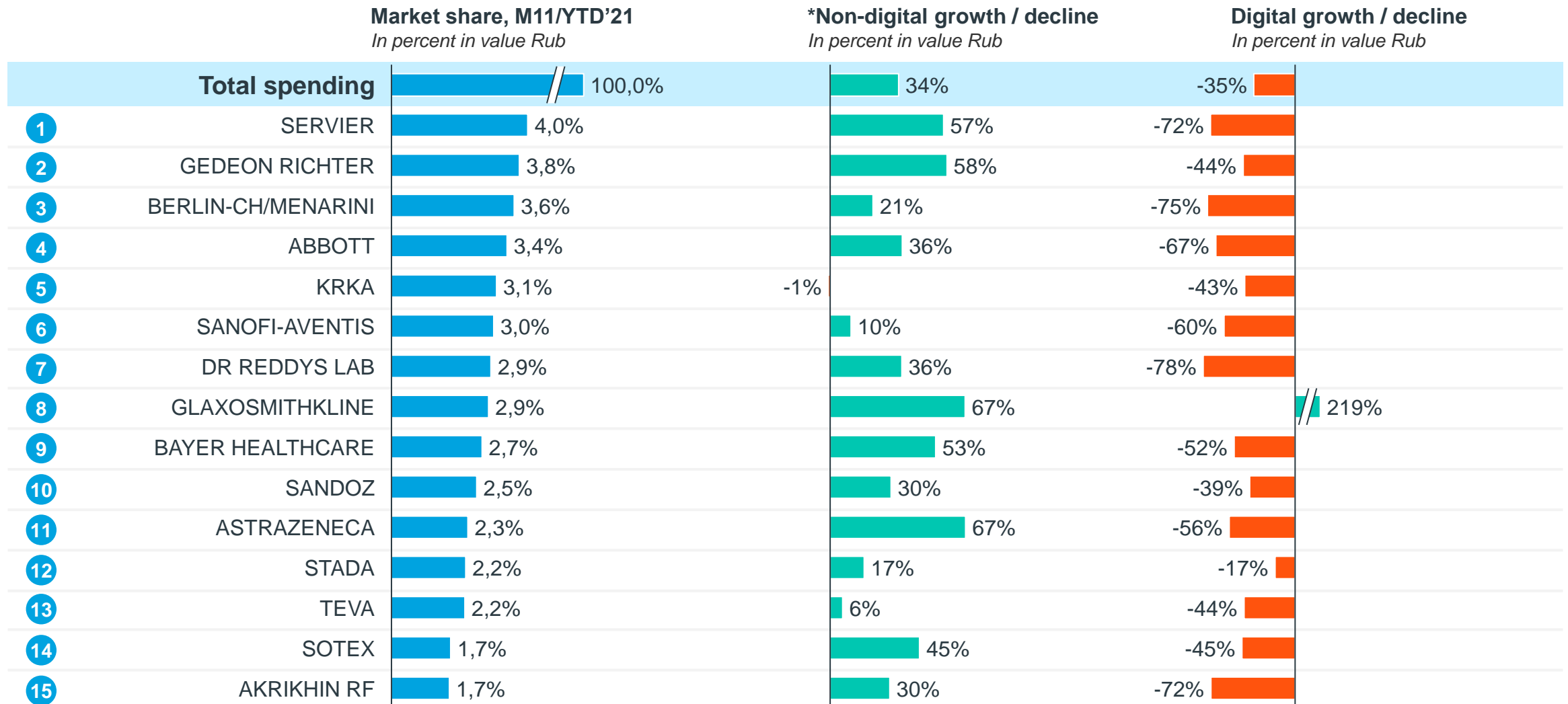
F2F Detailing – Reps visits. **Traditional others:** 1) F2F meetings – group meetings, round tables etc, 2) Phone Detailing – phone calls, 3) E-mail – communication via email. 4) Post Mailing – paper mails. **Digital:** 1) E-detailing – 1-1 calls visits using digitabl platforms 2) E-meetings – group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



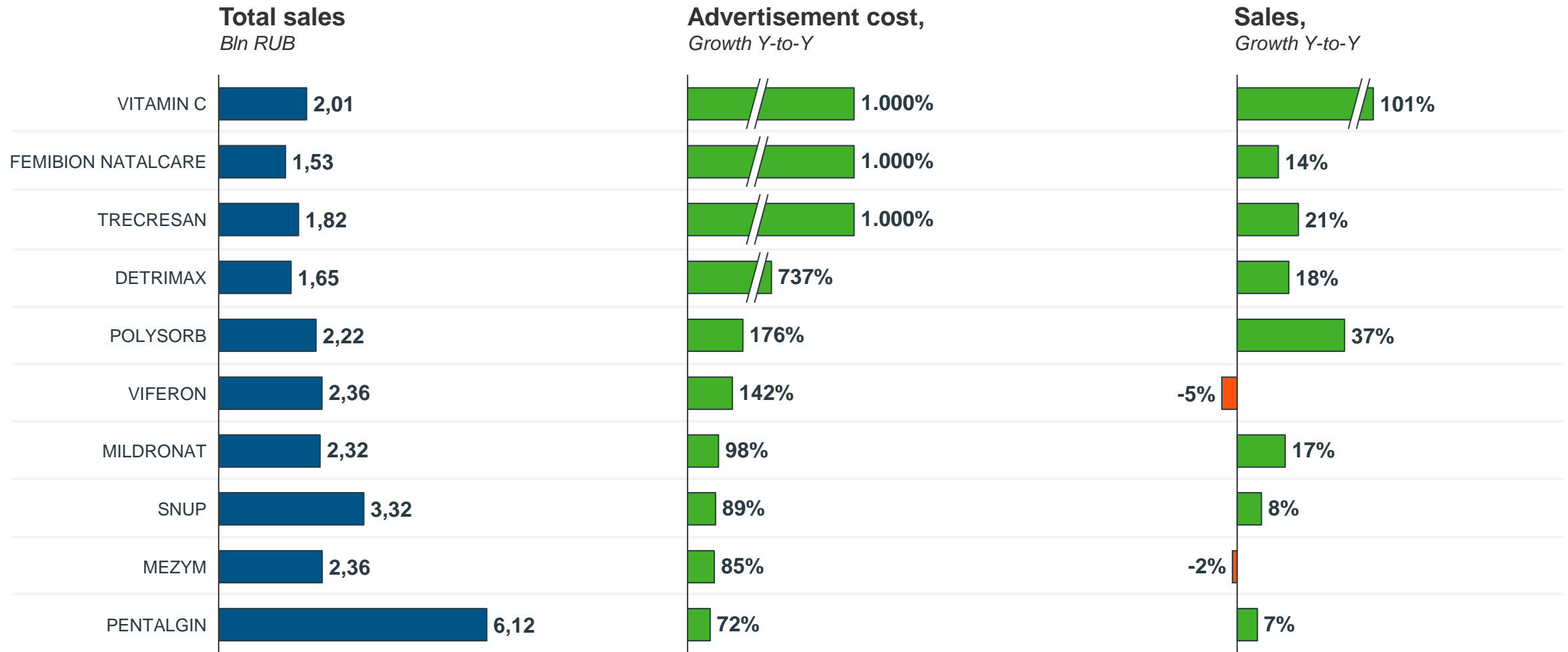
TOP-15 corporations on promotional value in Rub, Jan-Nov 2021



*Non-digital: F2F Detailing + Traditional others.

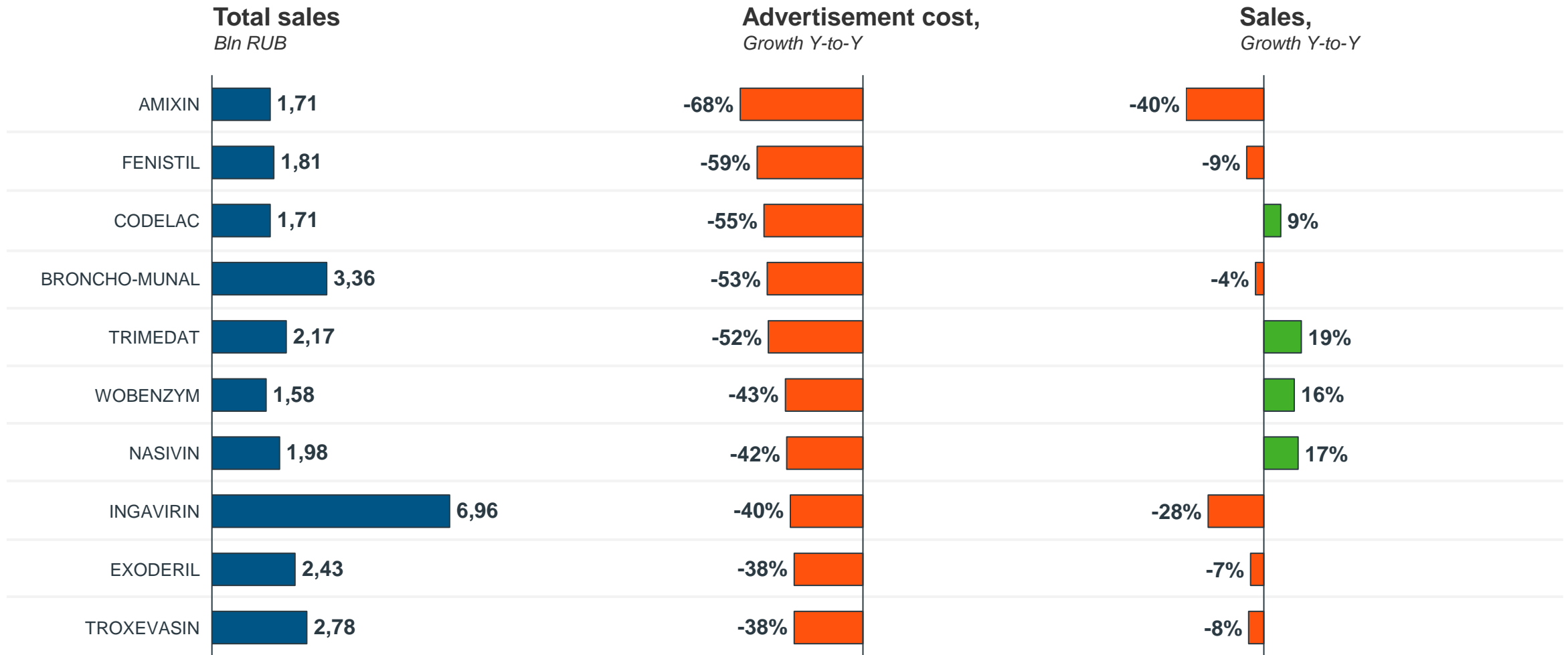
Source: IQVIA Russia, Channel Dynamics promo évaluation; Specialties: Allergology/Pulmonology, Cardiology, Dermatology, Diabetes, E.N.T., Gastroenterology, GPs, Gynecology, Neurology, Oncology, Pediatric, Pharma, Psychotherapy, Urology.

TOP-10 products by growth in advertisement investments in Jan-Nov 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-Nov 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



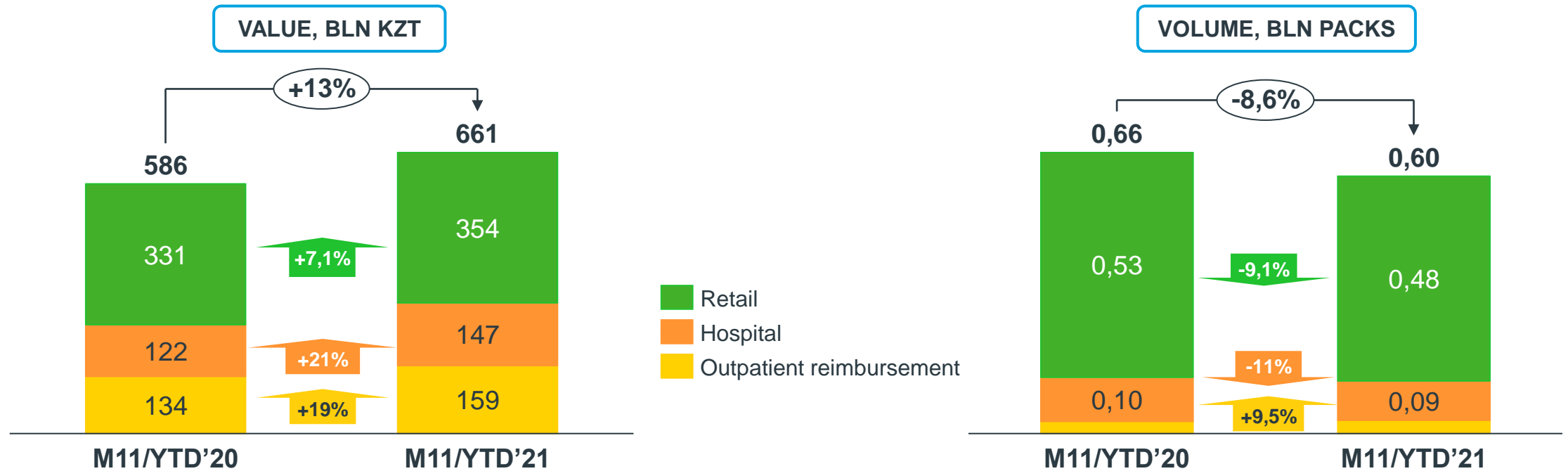
8,7%



INFLATION

Kazakhstan pharma market growth in Jan-Nov 2021

Market grew by 13% in value and decreased by 9% in volume

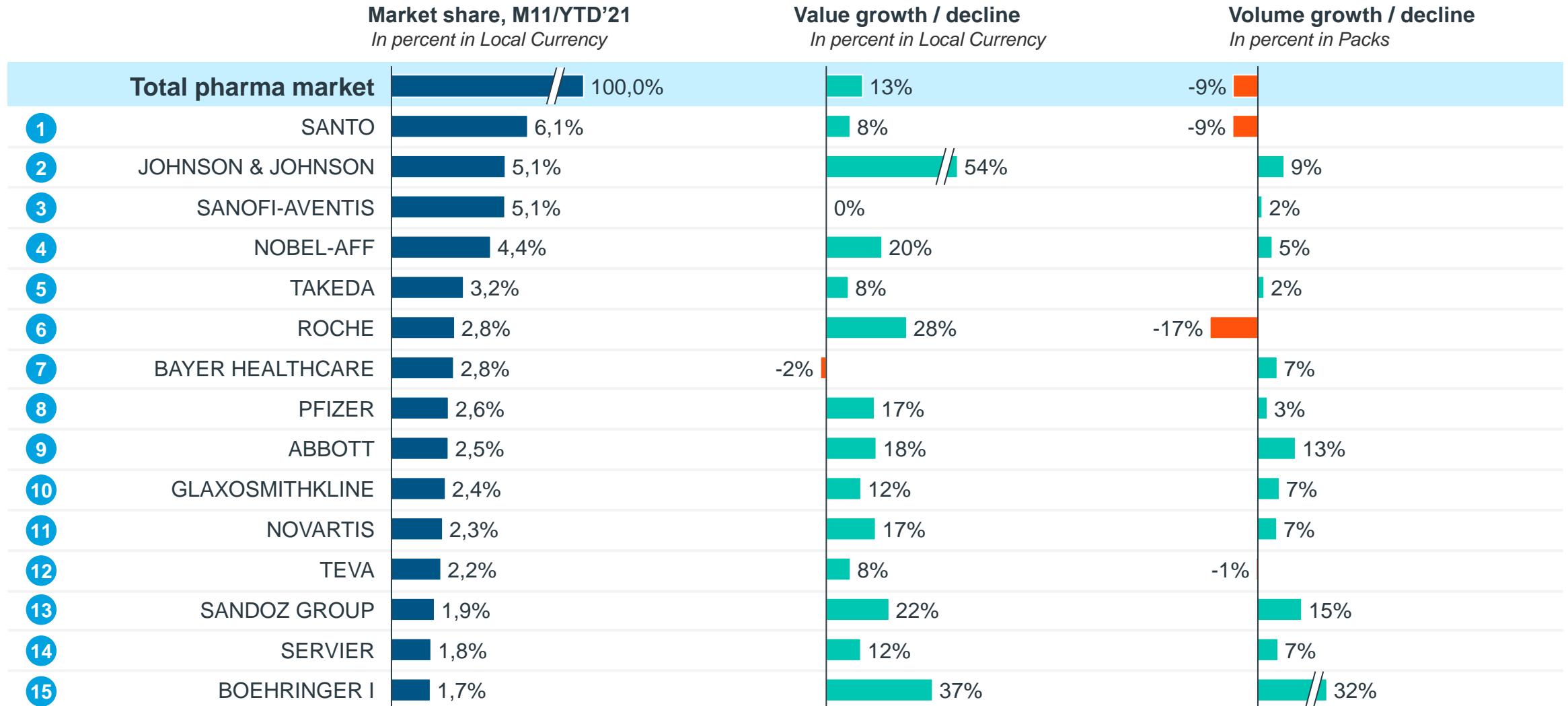


Indicator	KZT	USD	EUR	PACKS
Value M11/YTD'21, Bln.	661	1,56	1,31	0,60
Growth M11/YTD'21, %	▲ 13%	▲ 9,4%	▲ 4,4%	▼ -8,6%

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

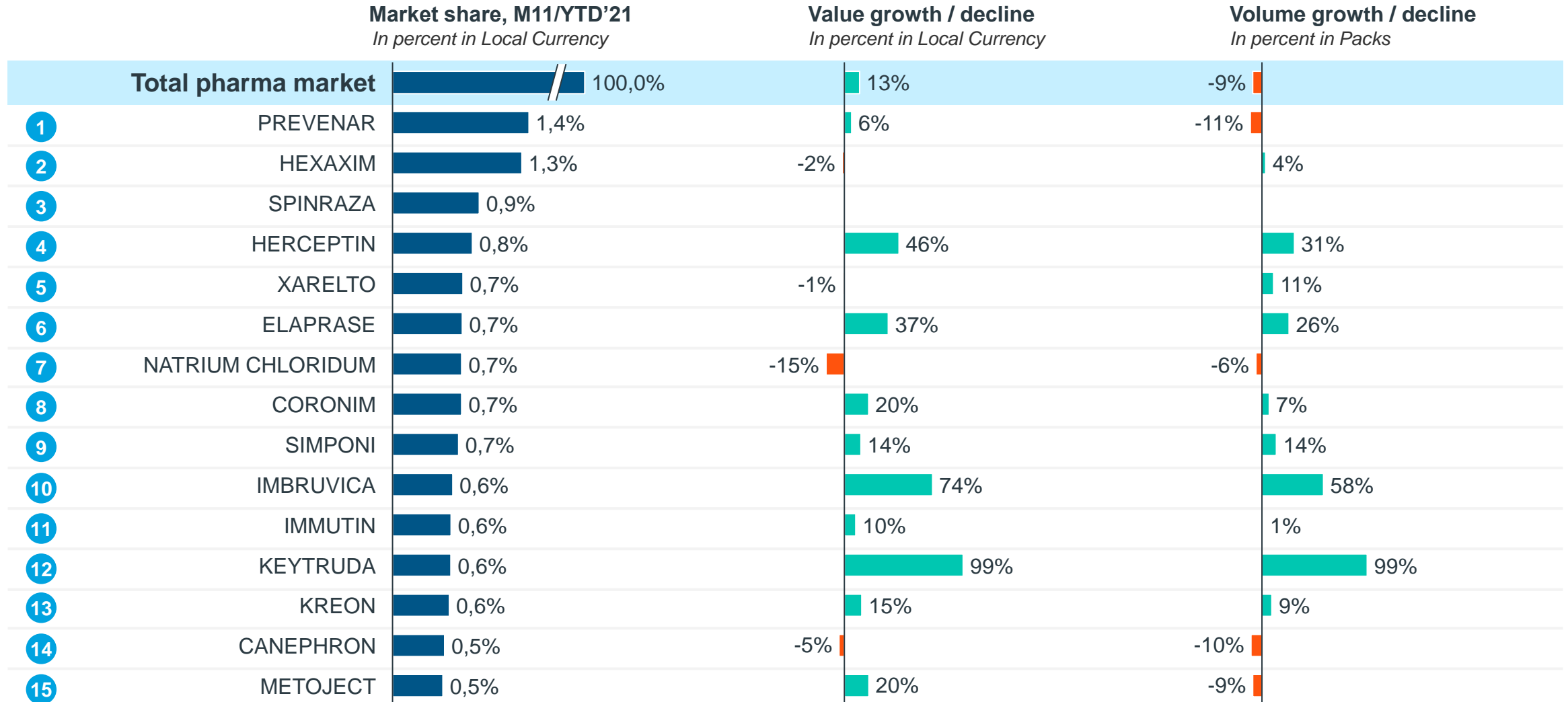


TOP-15 corporations on Kazakhstan market, Jan-Nov 2021





TOP-15 brands on Kazakhstan market, Jan-Nov 2021





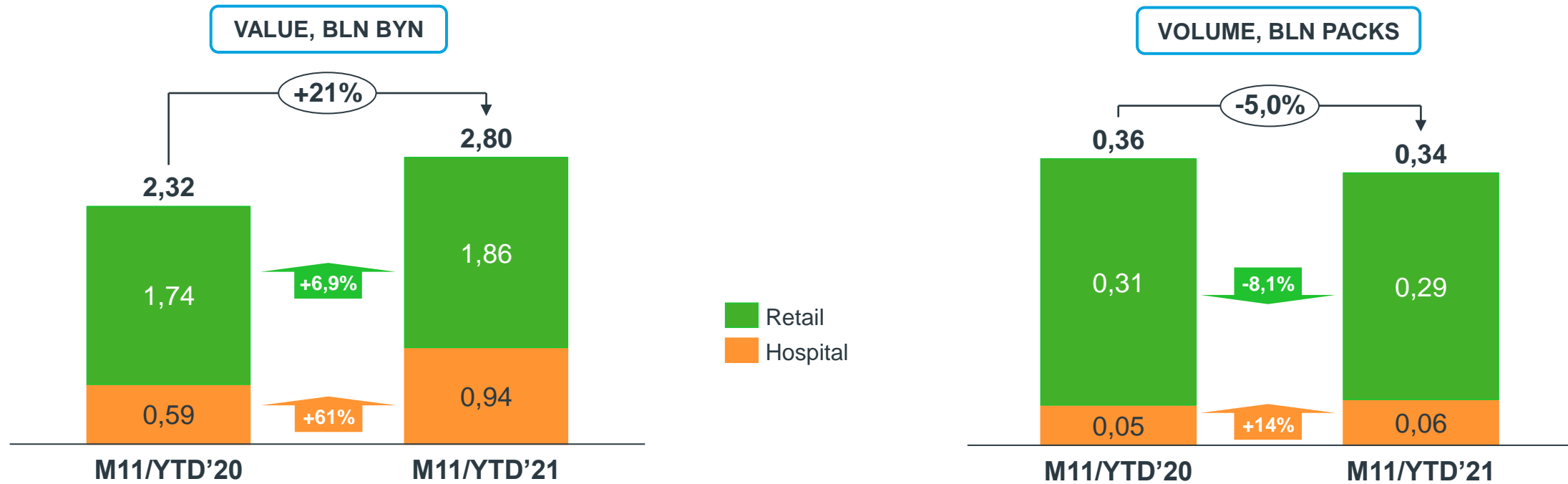
10,3%



INFLATION

Belarus pharma market growth in Jan-Nov 2021

Market grew by 21% in value and decreased by 5% in volume

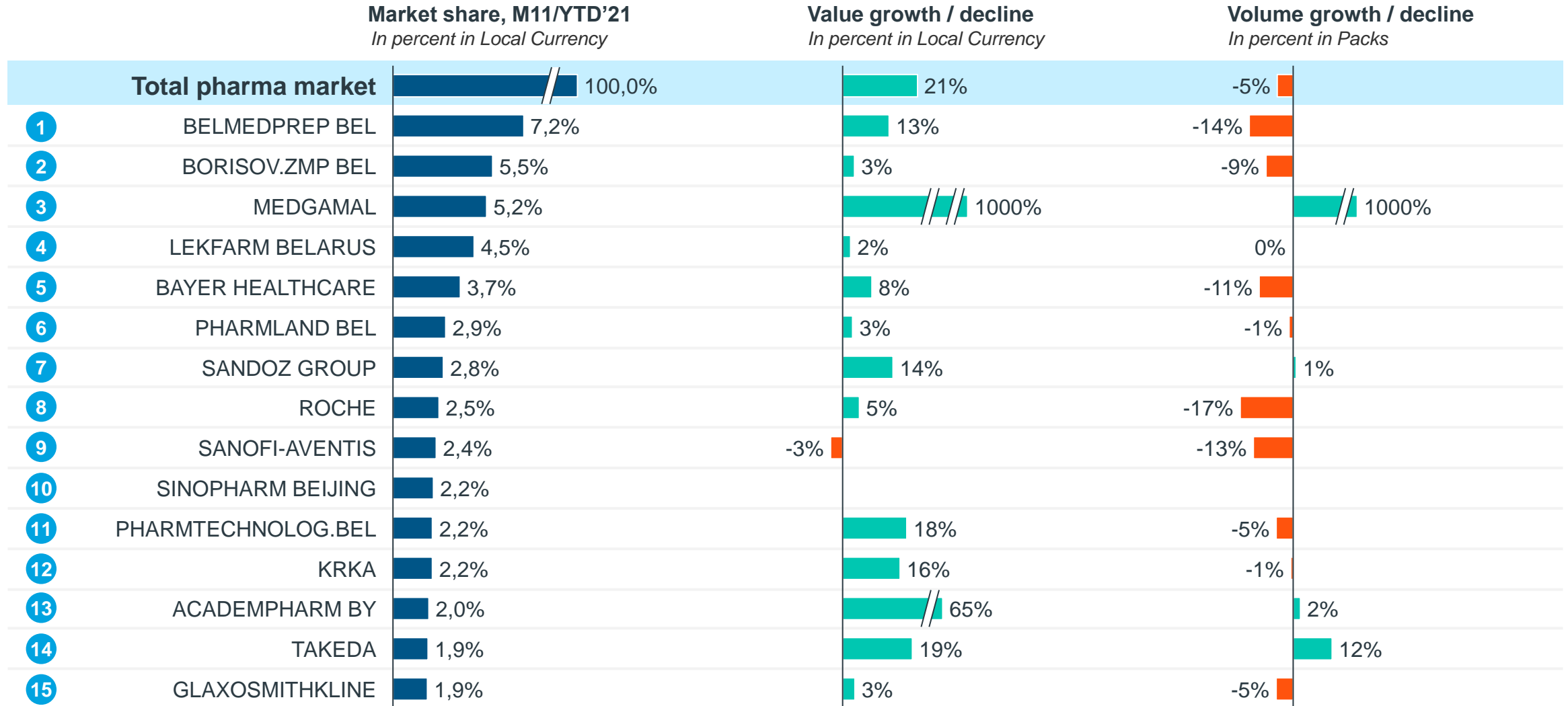


Indicator	BYN	USD	EUR	PACKS
Value M11/YTD'21, Bln.	2,80	1,11	0,93	0,34
Growth M11/YTD'21, %	▲ 21%	▲ 16%	▲ 11%	▼ -5,0%

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

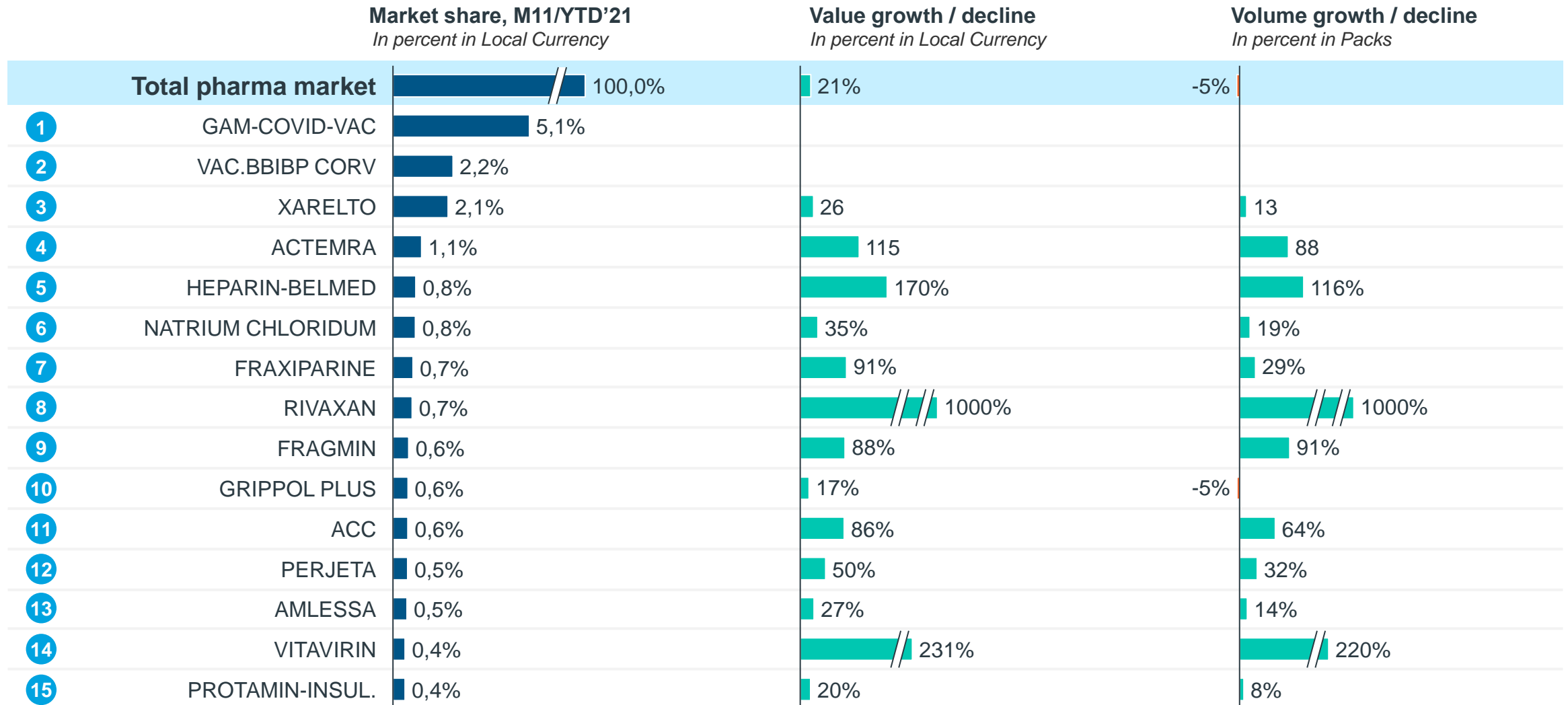


TOP-15 corporations on Belarus market, Jan-Nov 2021





TOP-15 brands on Belarus market, Jan-Nov 2021





10,3%



INFLATION

Uzbekistan pharma market growth in Jan-Nov 2021

Market grew by 39% in value and by 24% in volume



Indicator	UZS	USD	EUR	PACKS
Value M11/YTD'21, Bln.	16 199	1,53	1,29	0,83
Growth M11/YTD'21, %	▲ 39%	▲ 33%	▲ 28%	▲ 24%



TOP-15 corporations on Uzbekistan market, Jan-Nov 2021

	Market share, M11/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>
Total pharma market	100,0%	39%	24%
1 ANHUI ZHIFEI LONG.	3,4%		
2 KRKA	3,1%	37%	36%
3 MENARINI	2,7%	25%	8%
4 SANOFI-AVENTIS	2,7%	47%	51%
5 FARMAK KIEV	2,3%	32%	13%
6 NOVARTIS	2,3%	34%	13%
7 WORLD MEDICINE	2,1%	74%	58%
8 NIKA-PHARM	2,1%	89%	45%
9 ZHURABEK LAB	2,1%	4%	-9%
10 GM PHARMACEUTICALS	1,9%	61%	55%
11 YURIA-FARM UKR	1,8%	32%	19%
12 ABBOTT	1,7%	21%	16%
13 NOBEL ILAC SAN TUR	1,7%	39%	24%
14 GEDEON RICHTER	1,7%	16%	7%
15 STADA	1,4%	18%	15%

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-Nov 2021

		Market share, M11/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>
Total pharma market		100,0%	39%	24%
1	ZF-UZ-VAC2001	3,4%		
2	CEFTRIAXONE	1,3%	156%	-2%
3	TRIMOL	0,9%	699%	738%
4	REMDESSA	0,7%	40%	99%
5	NIMESIL	0,7%	89%	87%
6	QUPEN	0,7%	75%	73%
7	TIVORTIN	0,7%	60%	55%
8	THERAFLU	0,7%	115%	111%
9	L-LYSINE AESCINATE	0,6%	21%	6%
10	VIFERON	0,6%	49%	45%
11	ACTOVEGIN	0,6%	23%	16%
12	GRIPPOL PLUS	0,6%	1000%	1000%
13	ACC	0,5%	49%	61%
14	TYLOLFEN HOT	0,5%	38%	27%
15	AZIMAC	0,5%	50%	47%



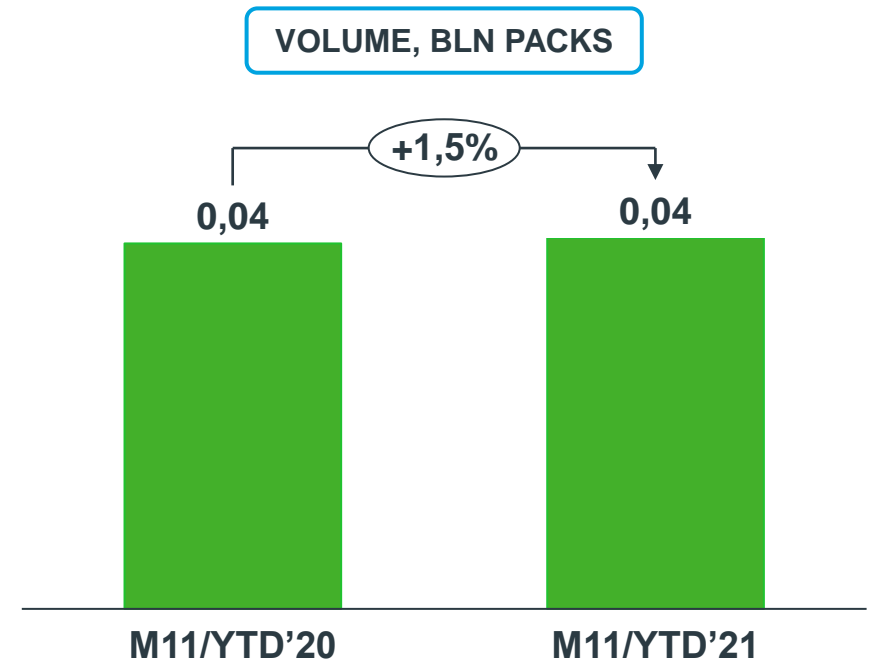
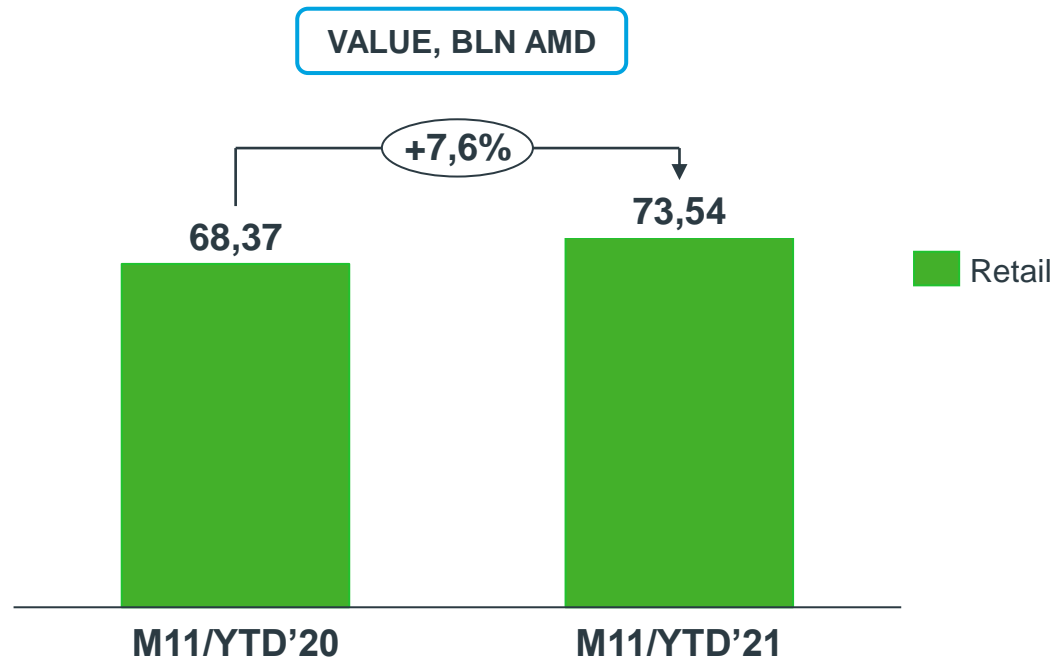
9,6%



INFLATION

Armenia pharma market growth in Jan-Nov 2021

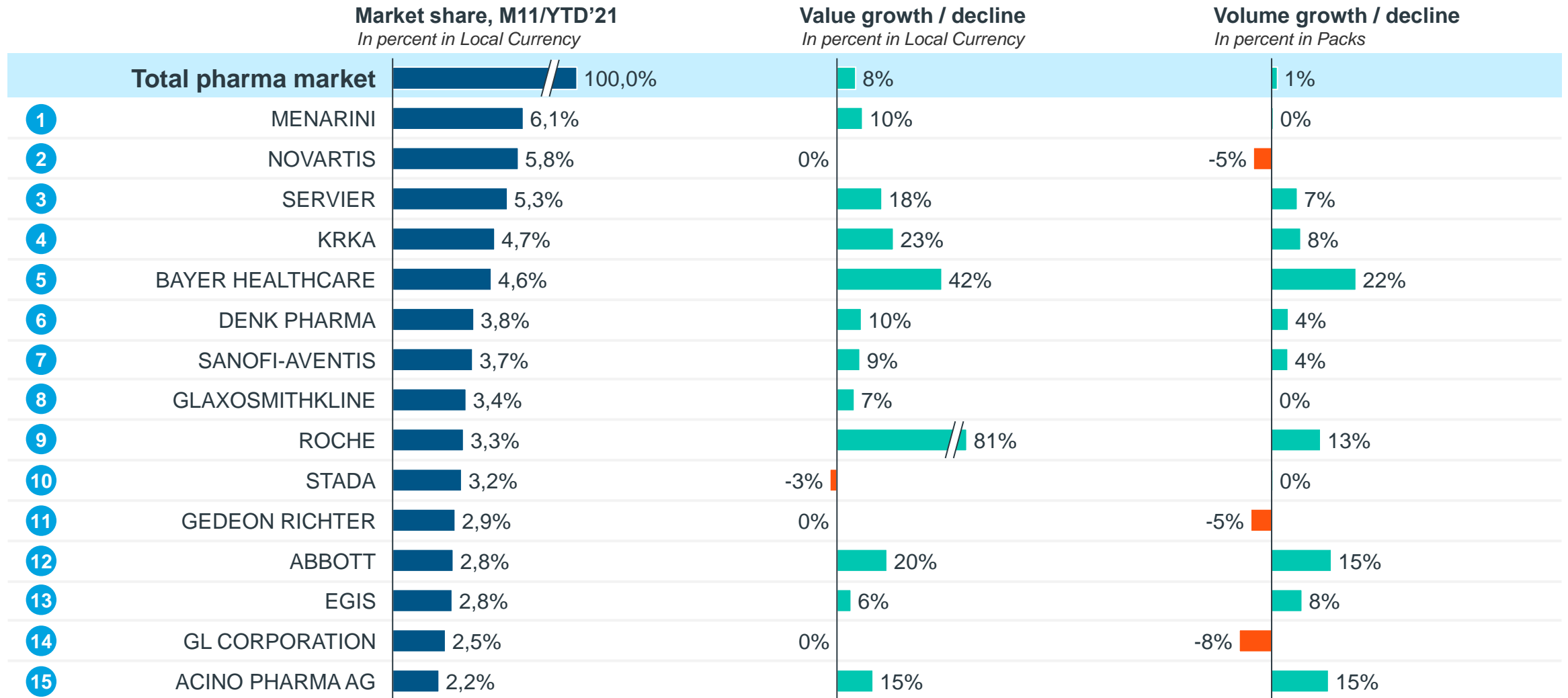
Market grew by 7,6% in value and by 1,5% in volume



Indicator	AMD	USD	EUR	PACKS
Value M11/YTD'21, Bln.	73,5	0,15	0,12	0,04
Growth M11/YTD'21, %	▲ 7,6%	▲ 3,9%	▼ -0,3%	▲ 1,5%



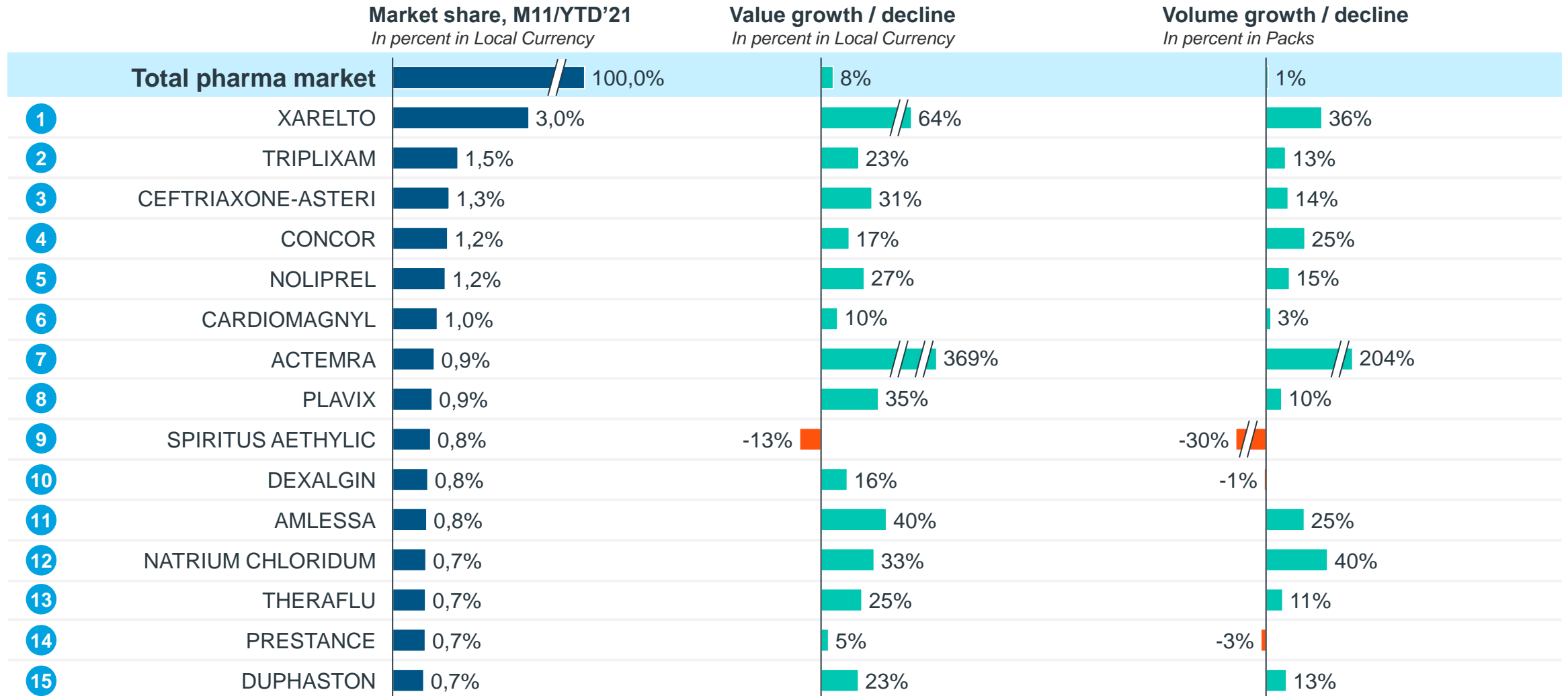
TOP-15 corporations on Armenia market, Jan-Nov 2021



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



TOP-15 brands on Armenia market, Jan-Nov 2021





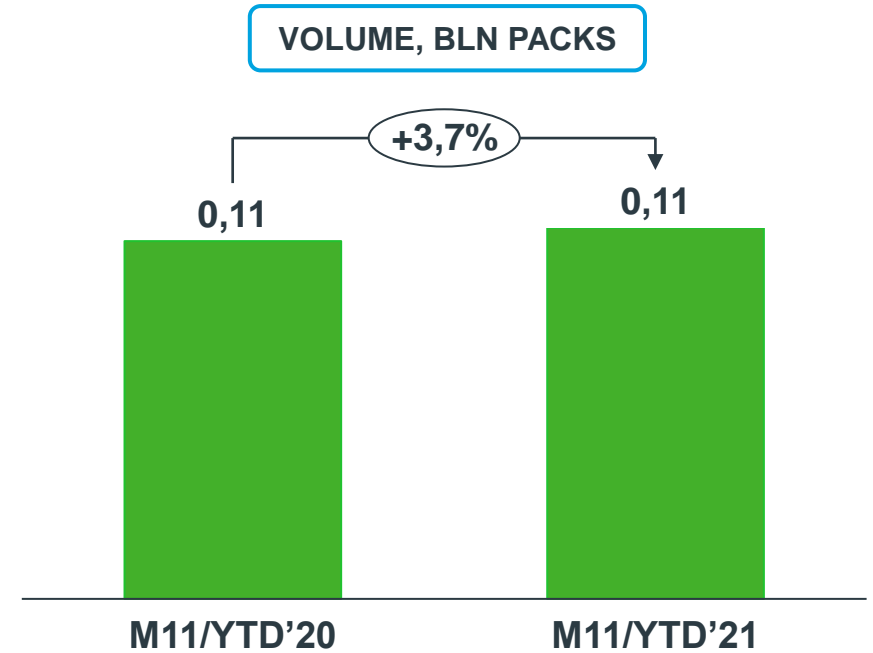
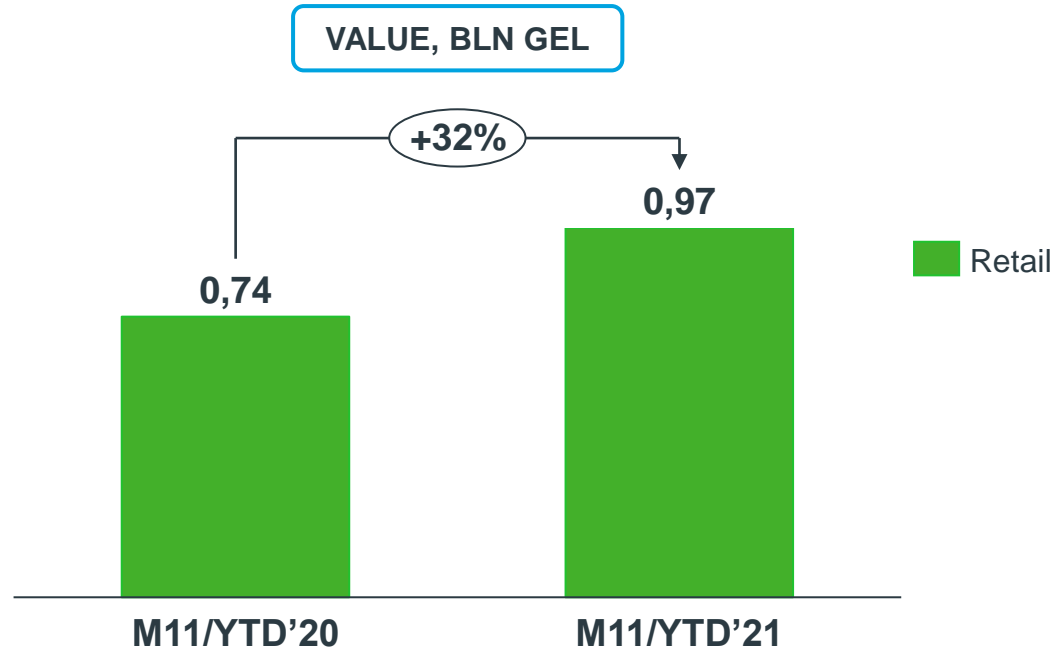
12,5%



INFLATION

Georgia pharma market growth in Jan-Nov 2021

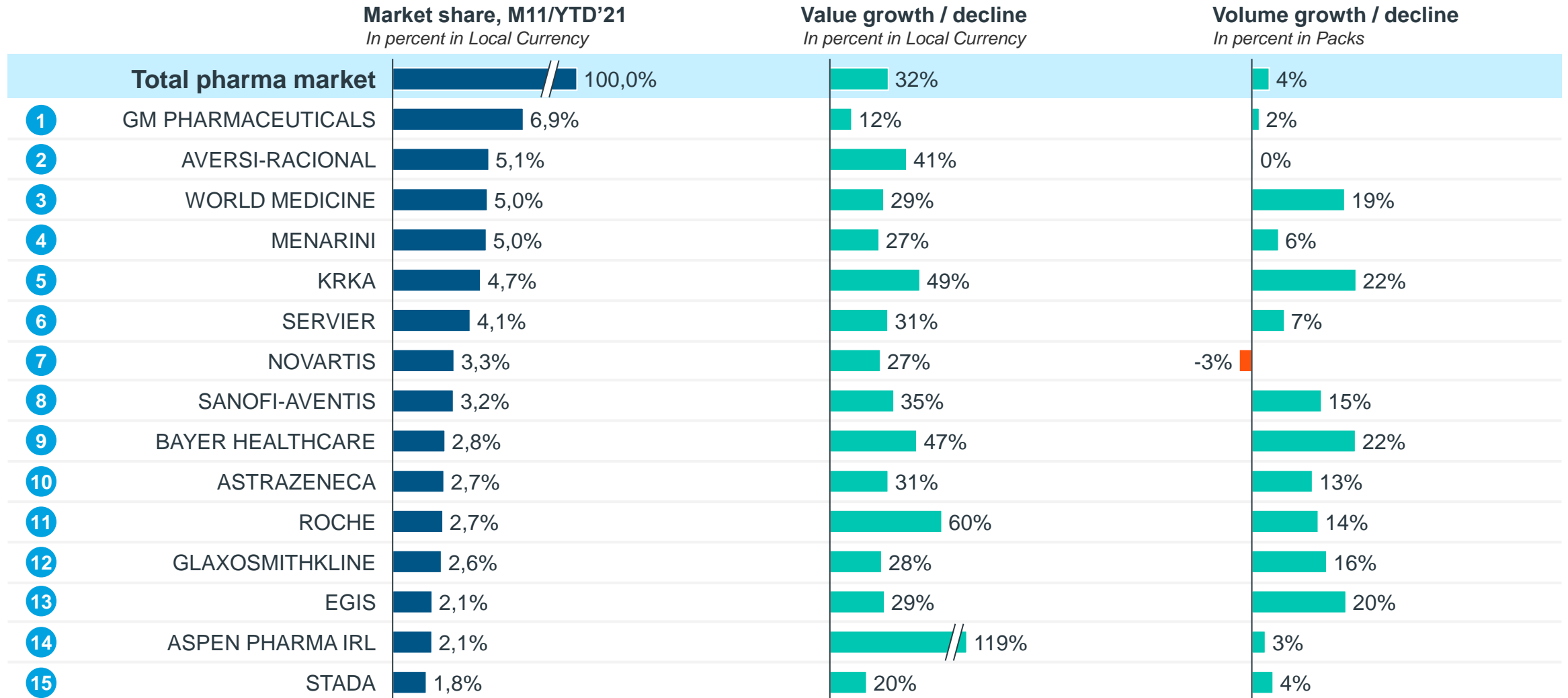
Market grew by 32% in value and by 3,7% in volume



Indicator	GEL	USD	EUR	PACKS
Value M11/YTD'21, Bln.	1,0	0,30	0,25	0,11
Growth M11/YTD'21, %	▲ 32%	▲ 26%	▲ 20%	▲ 3,7%



TOP-15 corporations on Georgia market, Jan-Nov 2021





TOP-15 brands on Georgia market, Jan-Nov 2021

		Market share, M11/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>
Total pharma market		100,0%	32%	4%
1	FRAXIPARINE	1,9%	129%	7%
2	XARELTO	1,5%	71%	44%
3	CARDIOMAGNYL	1,0%	45%	27%
4	DETRALEX	1,0%	51%	21%
5	LORISTA	0,8%	61%	48%
6	TRIPLIXAM	0,8%	29%	8%
7	AMLESSA	0,8%	57%	54%
8	NO SPA	0,7%	28%	10%
9	PRESTANCE	0,6%	22%	0%
10	NOLIPREL	0,6%	29%	7%
11	NATRIUM CHLORIDUM	0,6%	76%	43%
12	AUGMENTIN	0,6%	41%	32%
13	AVASTIN	0,5%	184%	164%
14	NIMESIL	0,5%	28%	11%
15	NUROFEN	0,5%	56%	43%



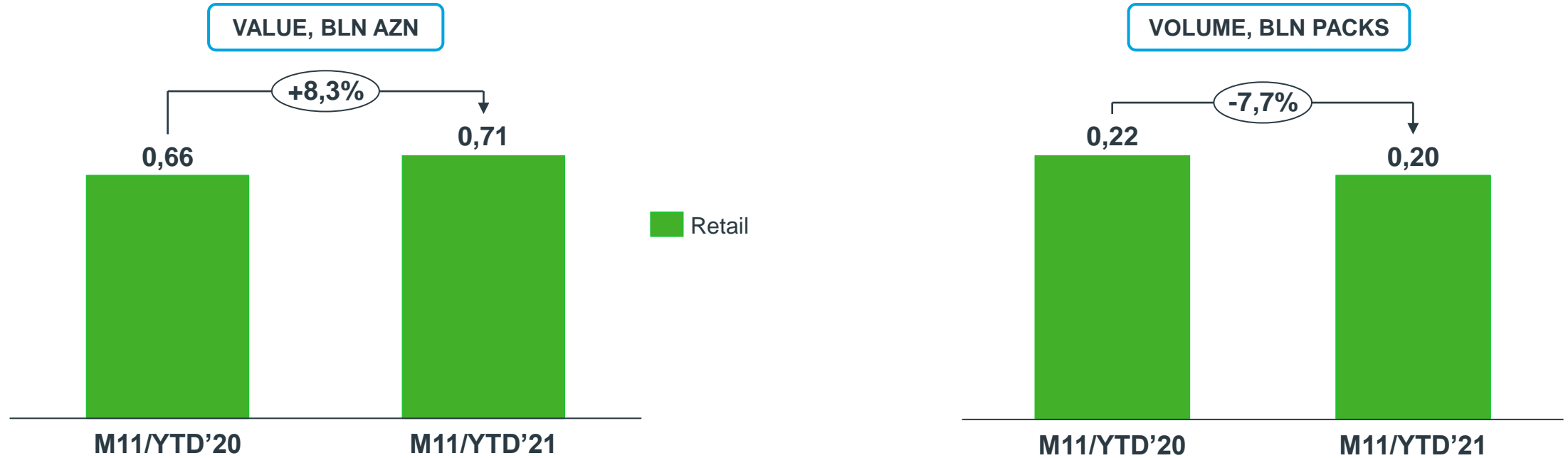
6,2%



INFLATION

Azerbaijan pharma market growth in Jan-Nov 2021

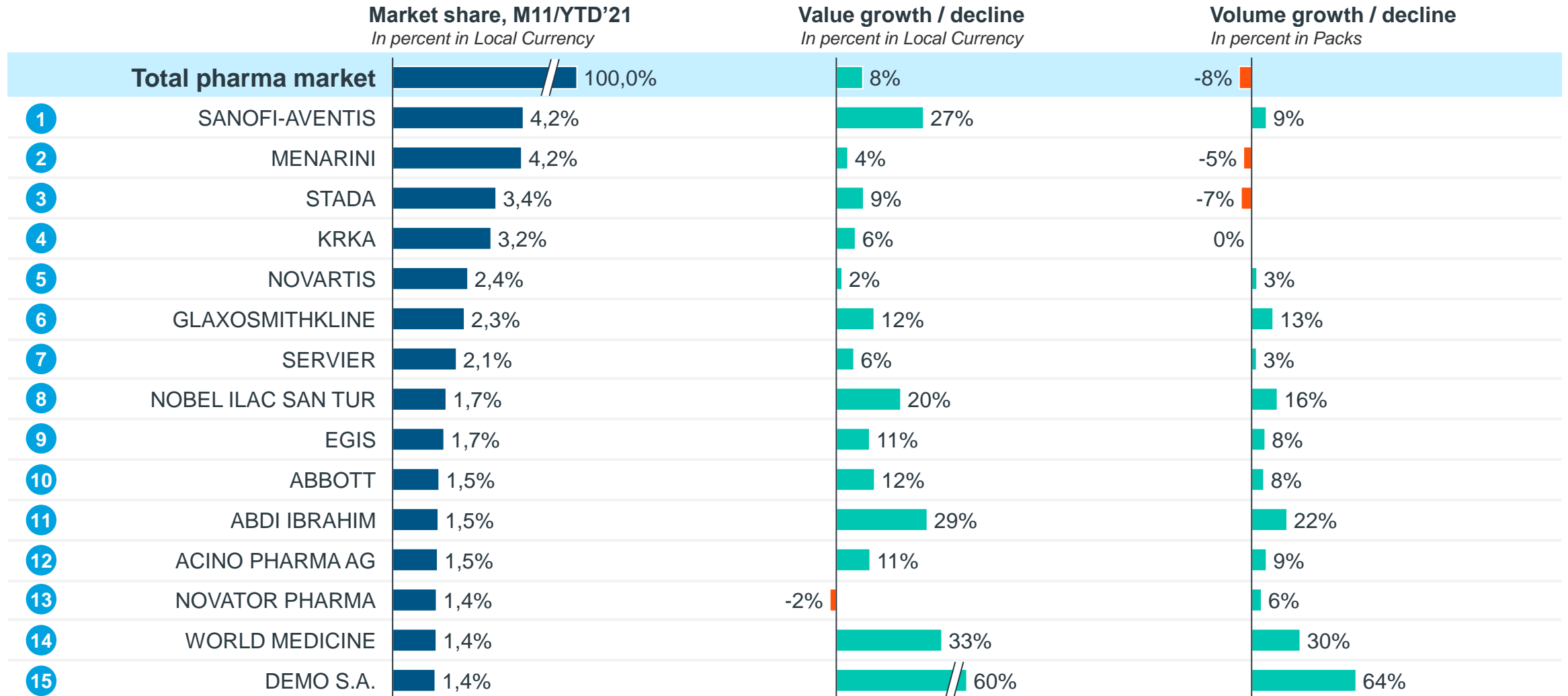
Market grew by 8,3% in value and decreased by 7,7% in volume



Indicator	AZN	USD	EUR	PACKS
Value M11/YTD'21, Bln.	0,71	0,42	0,35	0,20
Growth M11/YTD'21, %	▲ 8,3%	▲ 8,3%	▲ 3,8%	▼ -7,7%

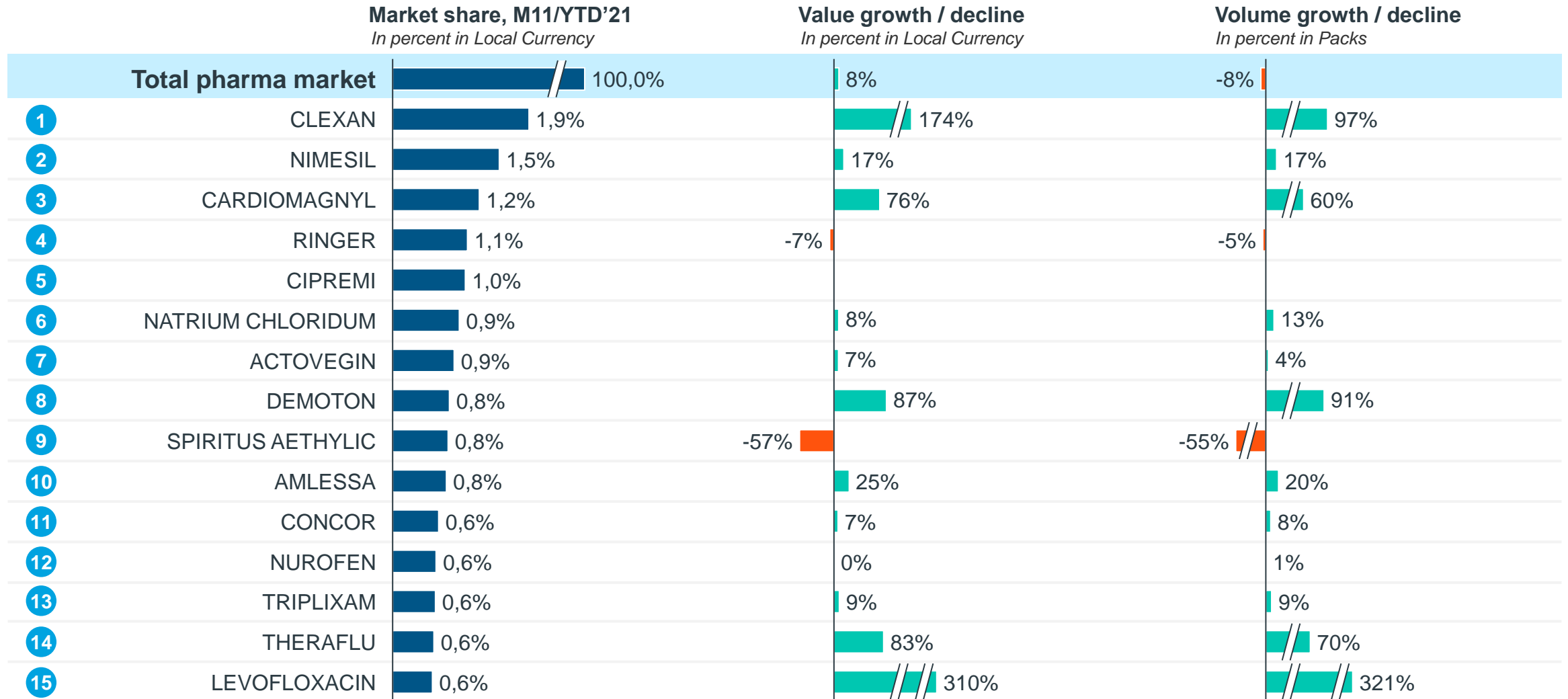


TOP-15 corporations on Azerbaijan market, Jan-Nov 2021





TOP-15 brands on Azerbaijan market, Jan-Nov 2021



CONTACT US

Anton Kalyapin

Director, Offering and Supplier Relations

 Anton.Kalyapin@IQVIA.com

 +7 499 272 05 00

Svetlana Nikulina

Sales Director Russia and CIS

 Svetlana.Nikulina@IQVIA.com

 +7 499 272 05 00

Bakhtiar Tinibaev

Supplier Services Analyst

 Bakhtiar.Tinibaev@IQVIA.com

 +7 499 272 05 00