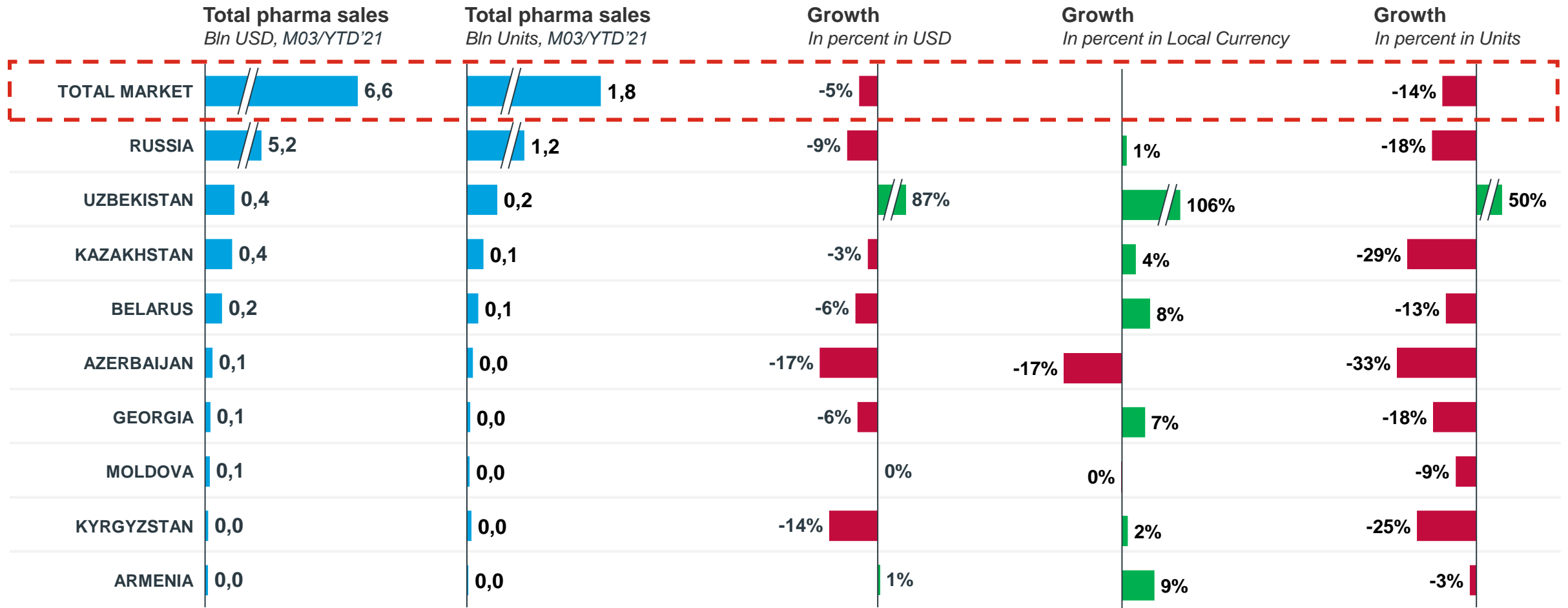


# Facts from IQVIA

M03 2021

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

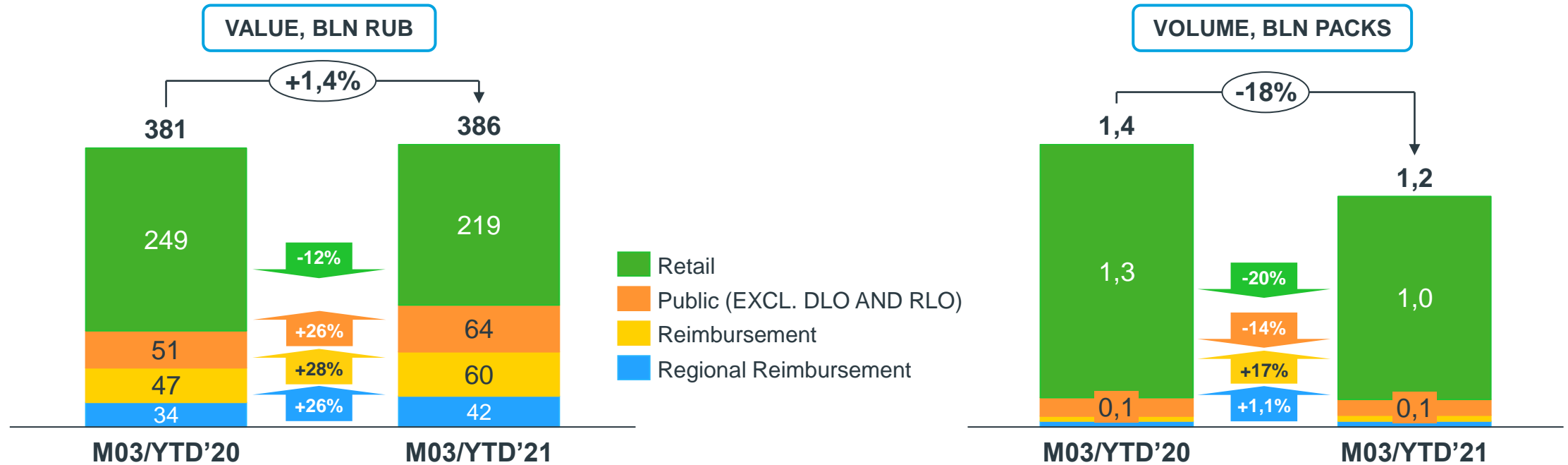
Total Market decreased by 5% in USD and by 14% in volume





# Russian pharma market growth in January-March 2021

Market grew by 1,4% in value and decreased by 18% in volume

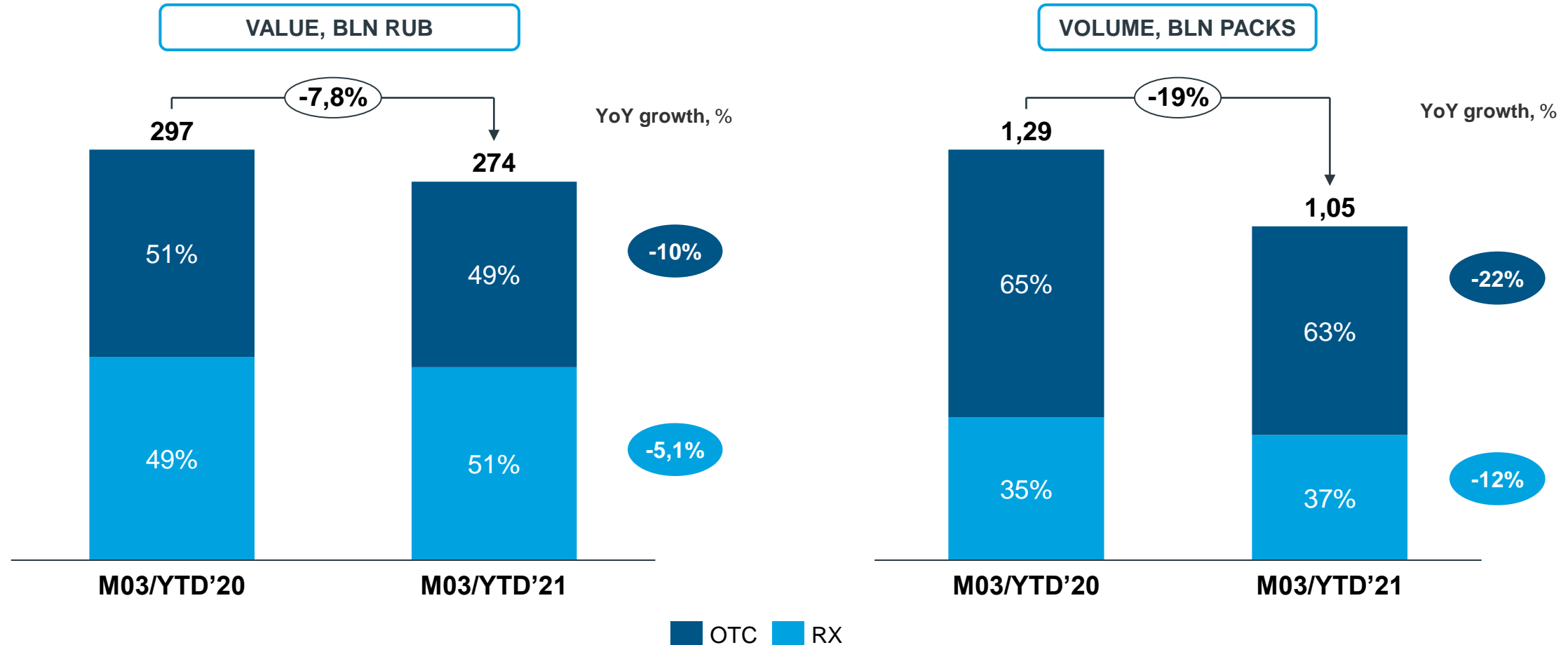


Indicator	RUB	USD	EUR	PACKS
Value M03/YTD'21, Bln.	386	5,2	4,3	1,2
Growth M03/YTD'21, %	▲ 1,4%	▼ -8,9%	▼ -17%	▼ -18%



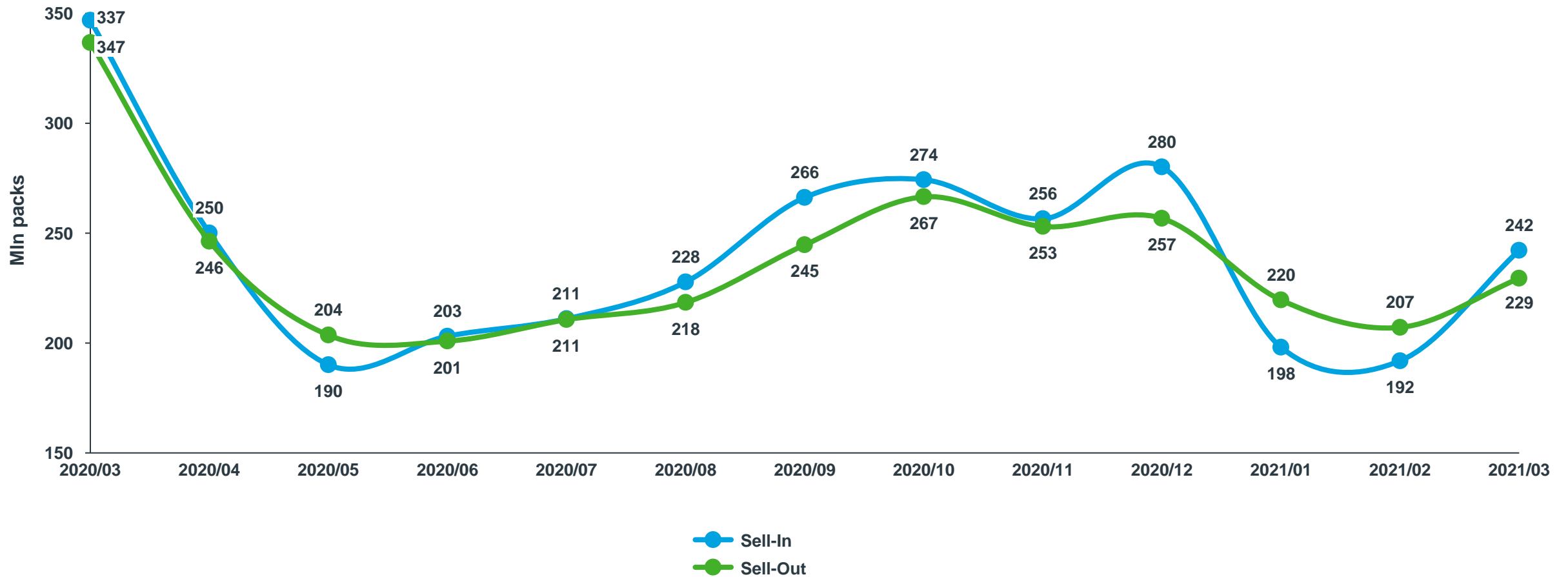
# Russian pharma market growth in January-March 2021

Retail Sell-Out: Market decreased by 7,8% in value and by 19% in volume





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



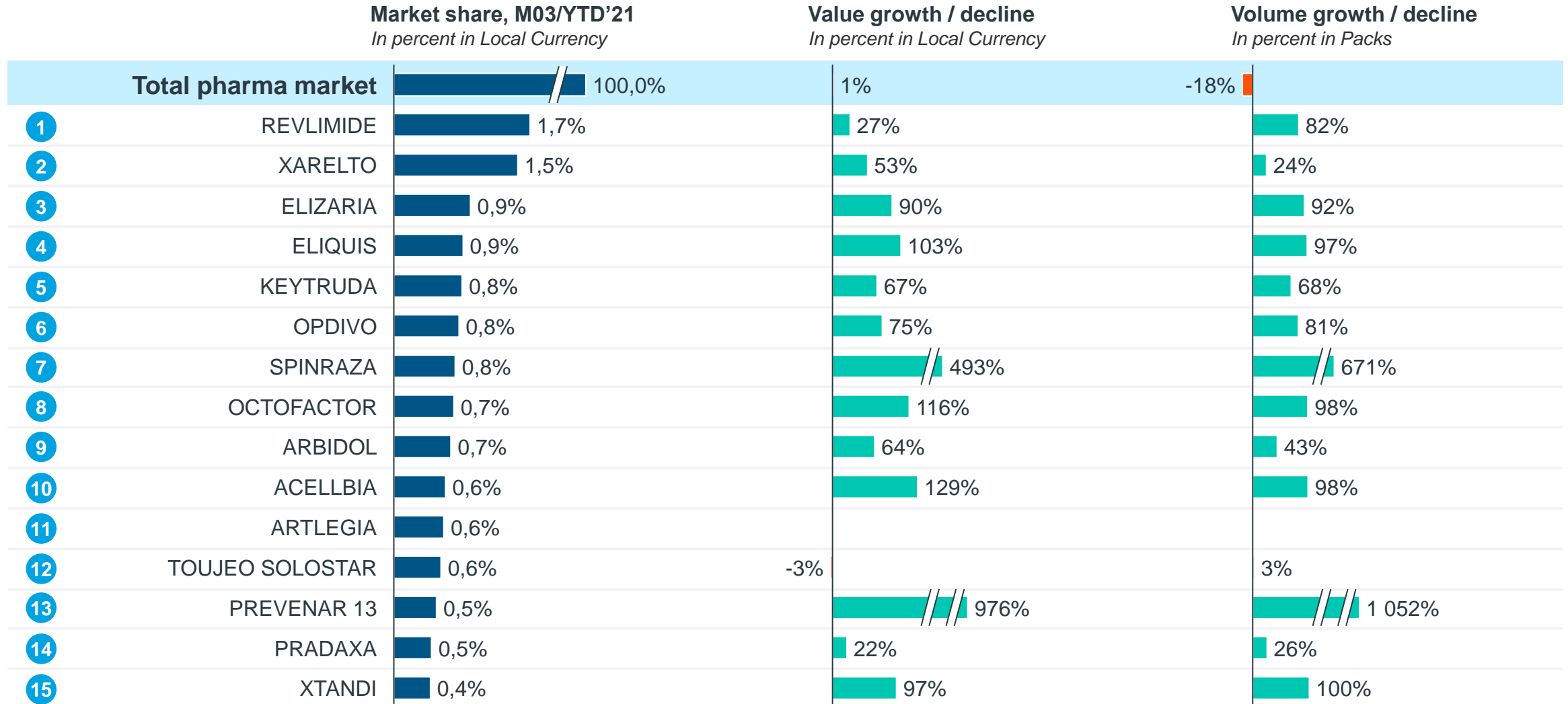


# TOP-15 corporations on Russian market, January-March 2021

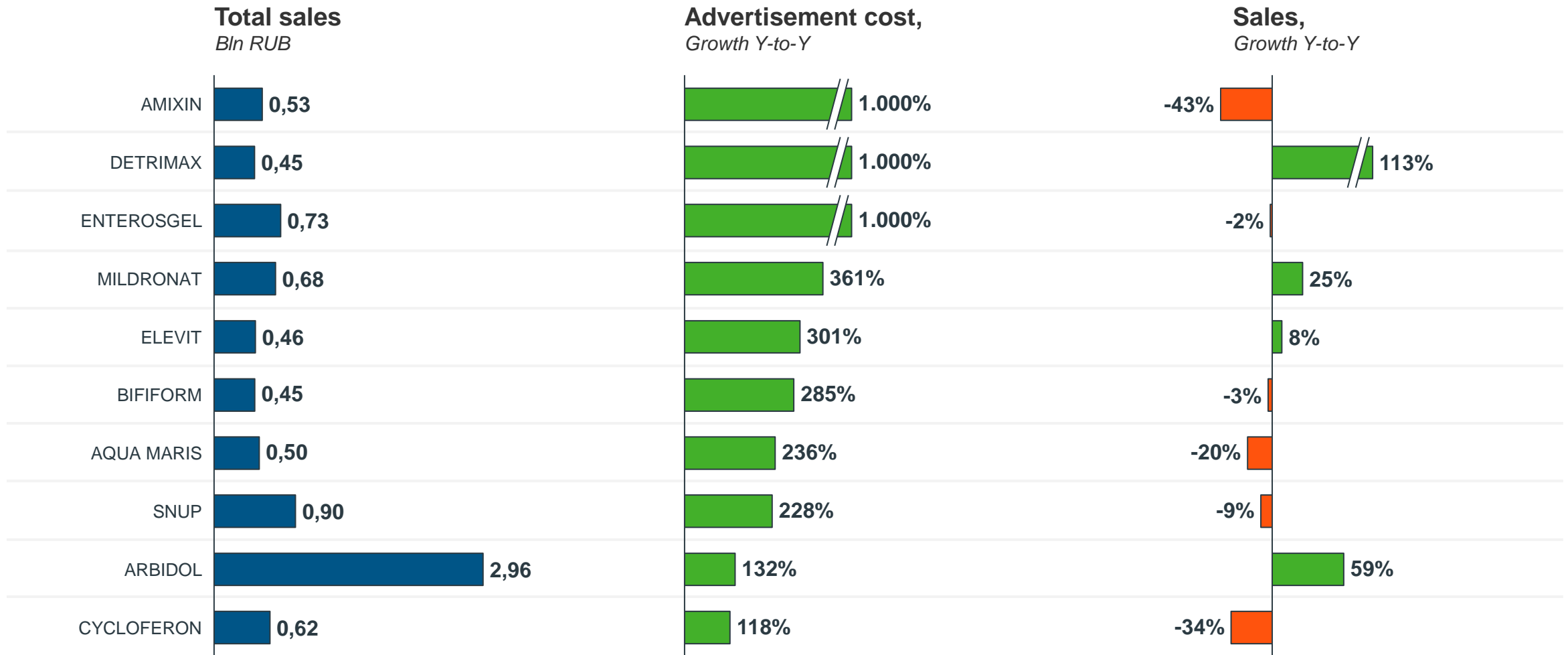
		Market share, M03/YTD'21 <i>In percent in Local Currency</i>	Value growth / decline <i>In percent in Local Currency</i>	Volume growth / decline <i>In percent in Packs</i>
<b>Total pharma market</b>		100,0%	1%	-18%
1	BAYER HEALTHCARE	4,1%	11%	-8%
2	JOHNSON & JOHNSON	3,8%	15%	-21%
3	SANOFI-AVENTIS	3,6%	-20%	-21%
4	PFIZER	2,6%	95%	100%
5	NOVARTIS	2,6%	5%	-20%
6	TAKEDA	2,5%	46%	-2%
7	GENERIUM ZAO RF	2,4%	55%	64%
8	OTCPHARM	2,4%	-1%	-10%
9	ROCHE	2,3%	42%	-45%
10	BIOCAD RF	2,2%	18%	-12%
11	STADA	2,2%	-11%	-17%
12	MERCK SHARP DOHME	2,0%	3%	-24%
13	TEVA	2,0%	-12%	-12%
14	ASTRAZENECA	1,9%	8%	-9%
15	SERVIER	1,8%	-16%	-12%



# TOP-15 brands on Russian market, January-March 2021



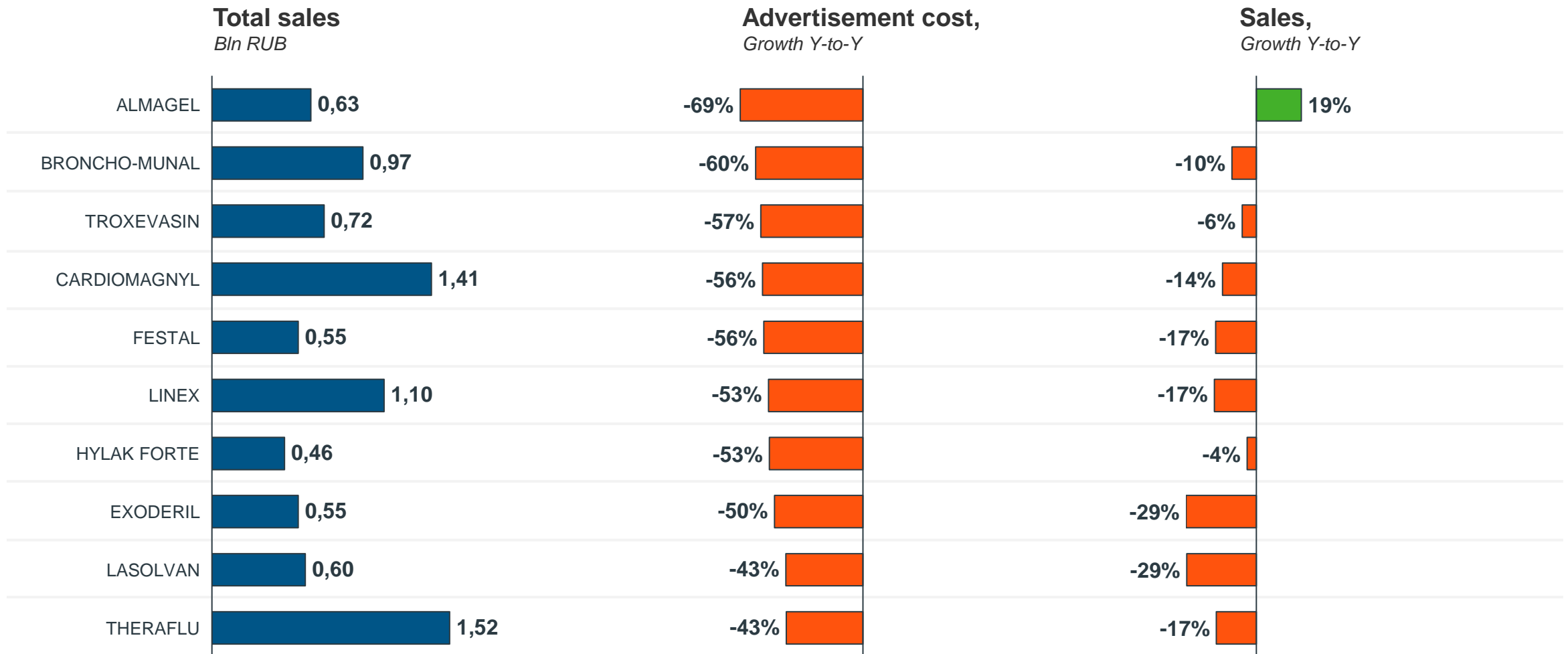
# TOP-10 products by growth in advertisement investments in January-March 2021



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

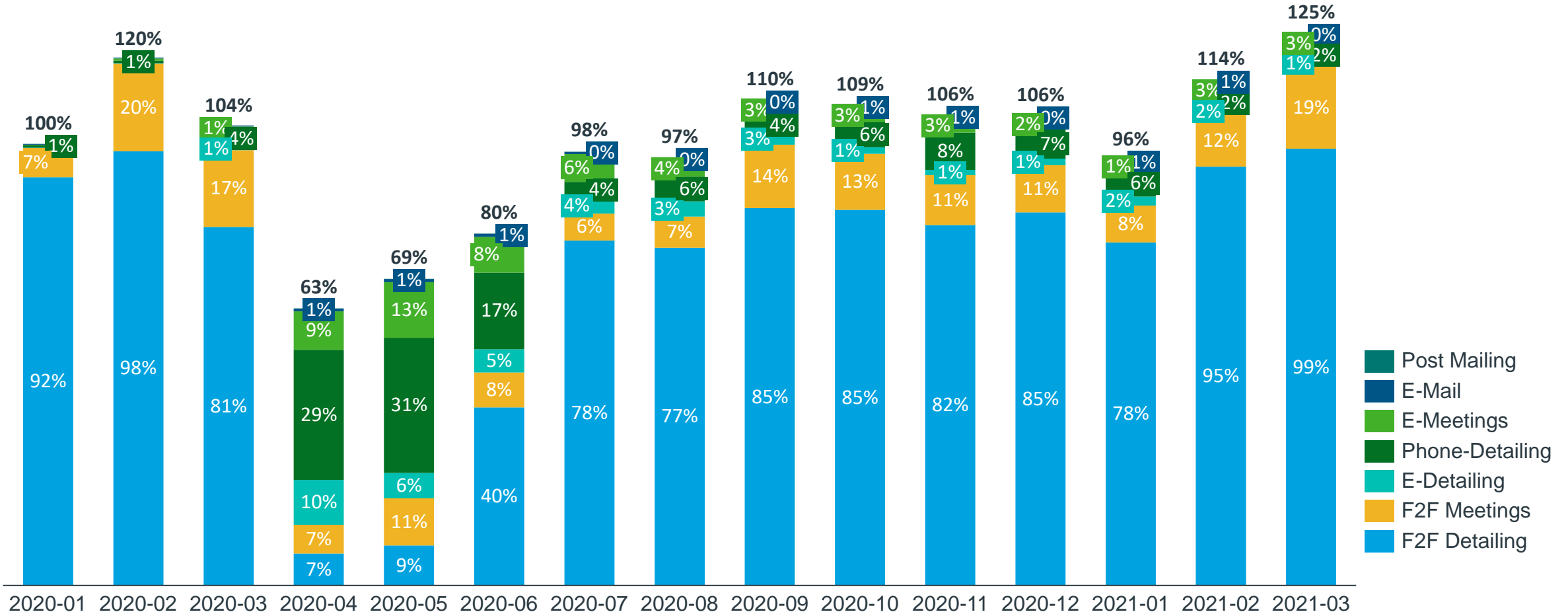


# TOP-10 products by decline in advertisement investments in January-March 2021



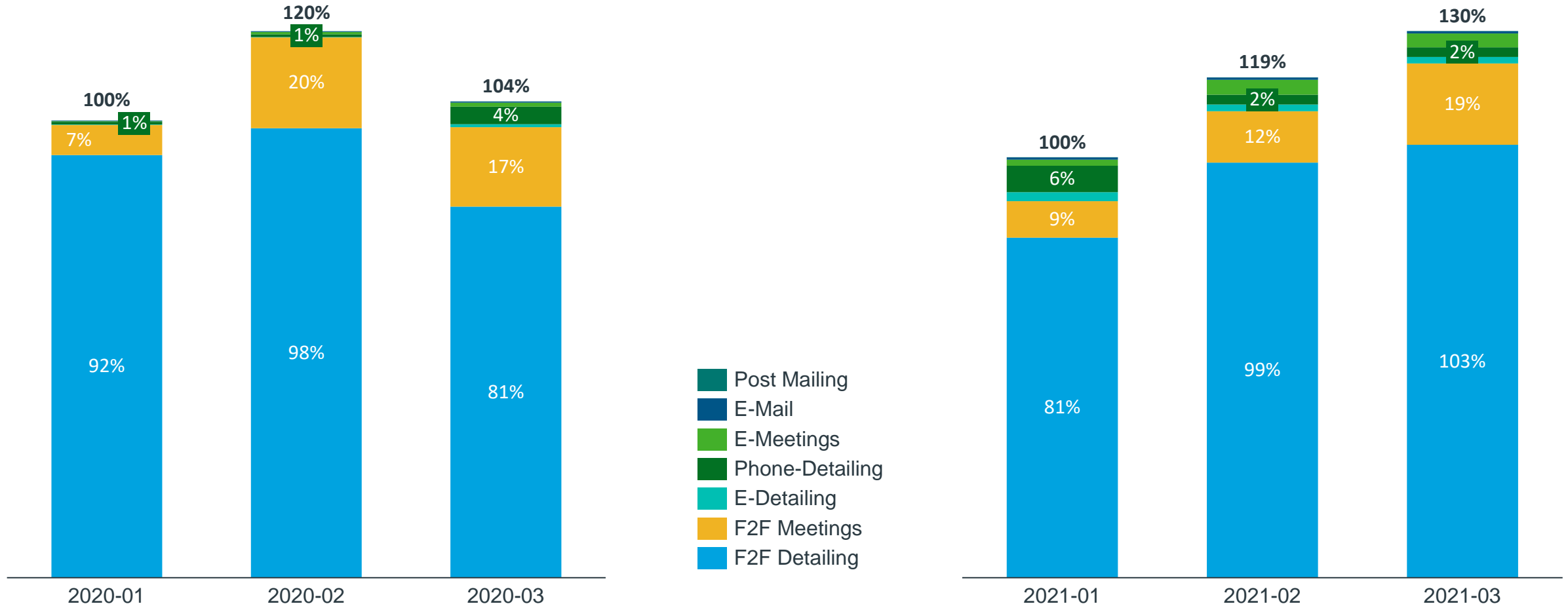
The rank is calculated among TOP-200 Brands by sales with advertising cost greater than 50 mln RUB  
 Source: IQVIA databases. Pharmatrend, Mediascope data, FIN Prices

# Index of promotional interactions by channel in Russia, January 2020 - March 2021



Source: IQVIA Russia, Channel Dynamics promo evaluation

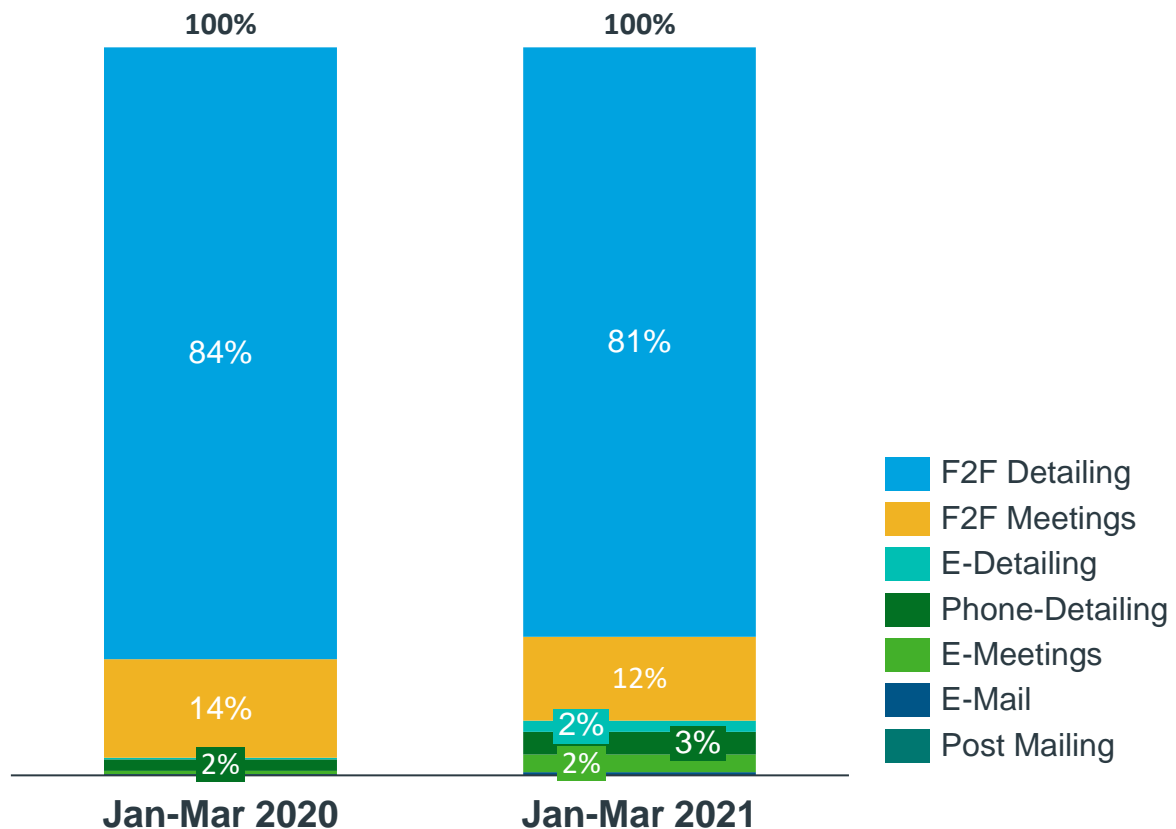
# Index of promotional interactions by channel in Russia, January-March 2020 & 2021



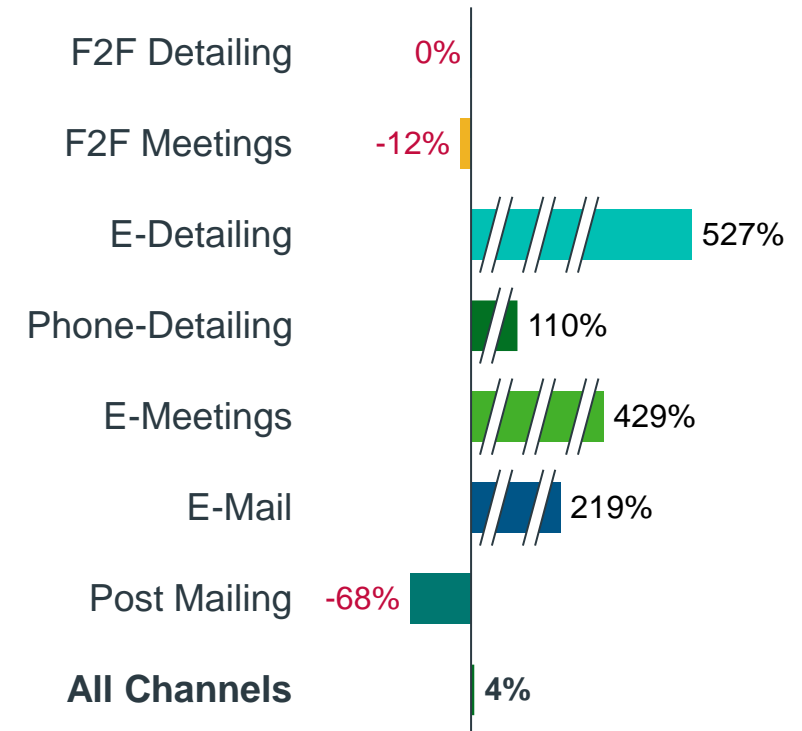
# Total Market overall promotional volume increased by 4%, January-March 2021 vs 2020



Promotional volume share by channel



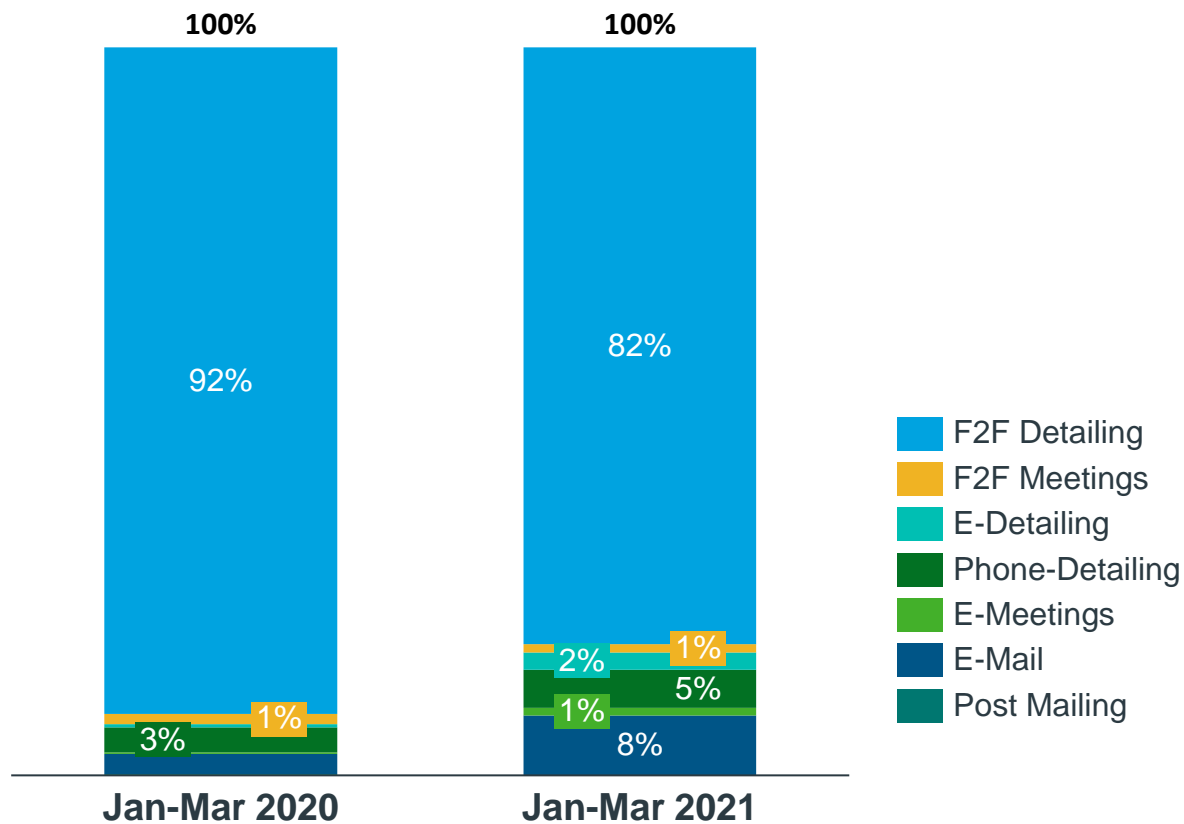
% Changes in promotional volume by channel  
Jan-Mar 2021 vs 2020



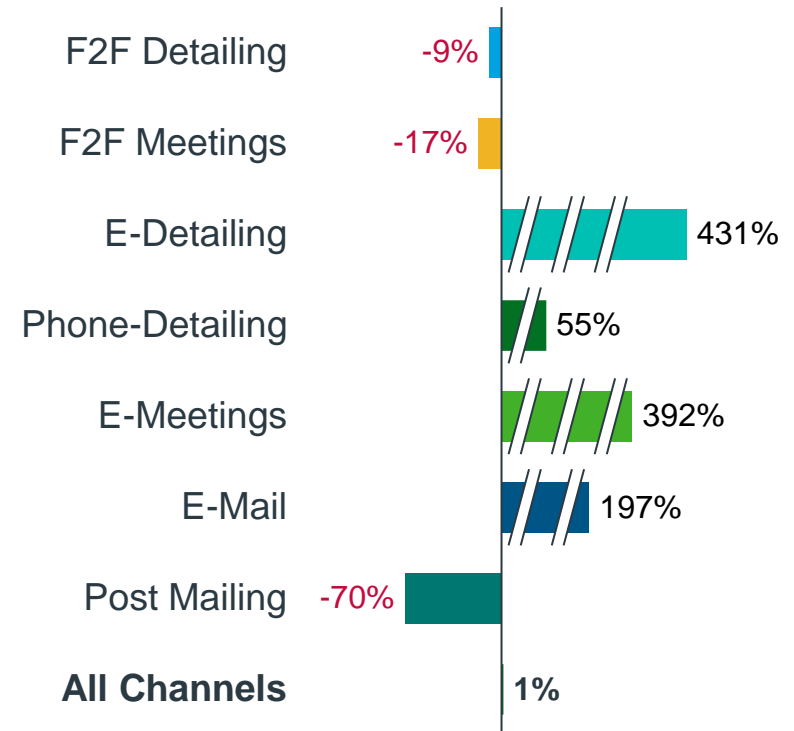
# Total Market overall promotional volume (contacts) increased by 1%, January-March 2021 vs 2020



Promotional volume (contacts) share by channel



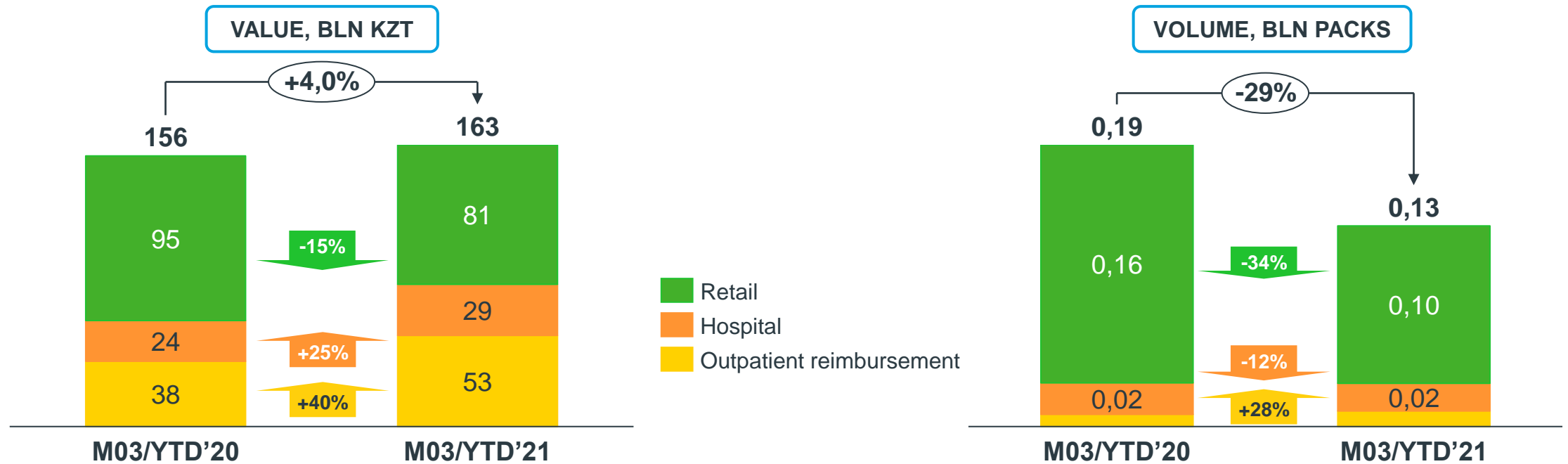
% Changes in promotional volume (contacts) by channel Jan-Mar 2021 vs 2020





# Kazakhstan pharma market growth in January-March 2021

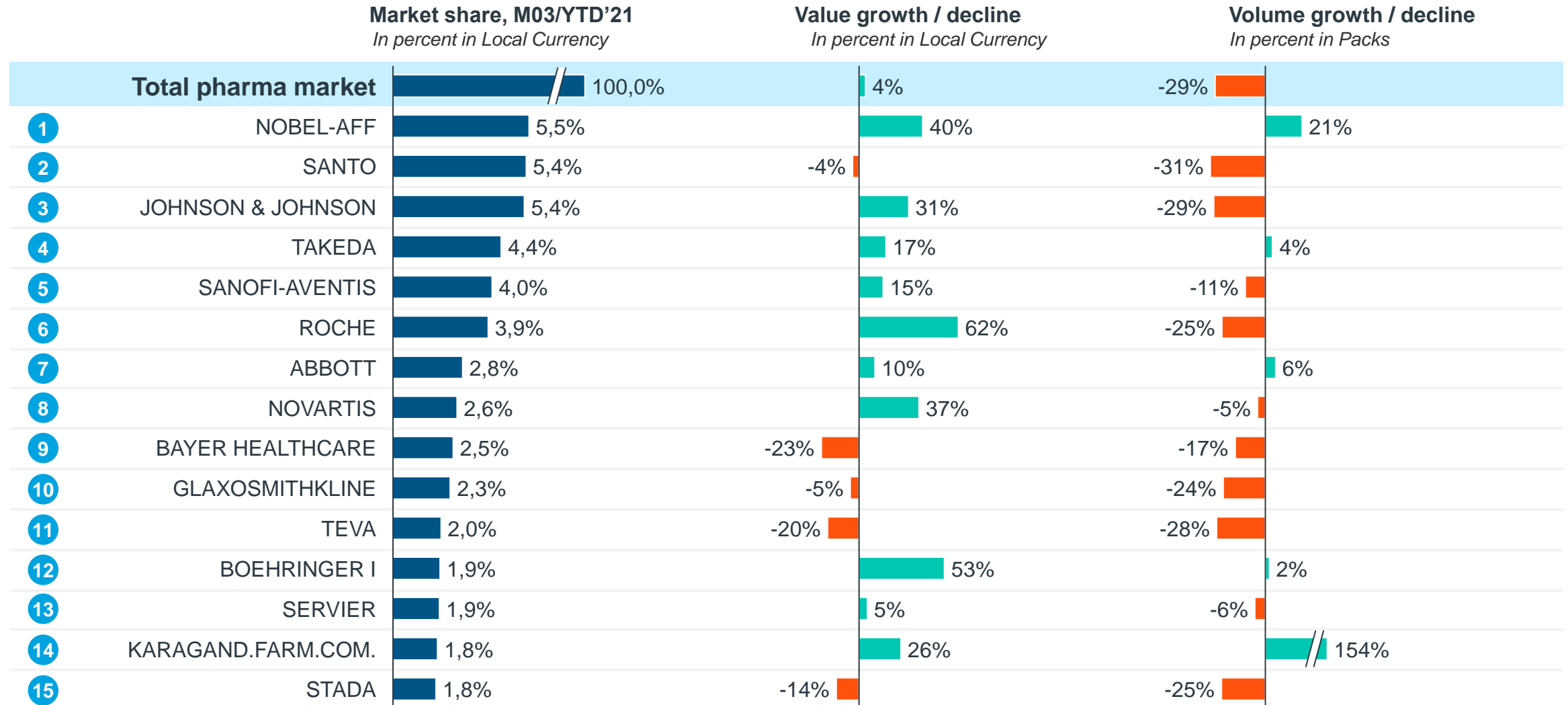
Market grew by 4,0% in value and decreased by 29% in volume



Indicator	KZT	USD	EUR	PACKS
Value M03/YTD'21, Bln.	163	0,39	0,32	0,13
Growth M03/YTD'21, %	▲ 4,0%	▼ -2,9%	▼ -11%	▼ -29%



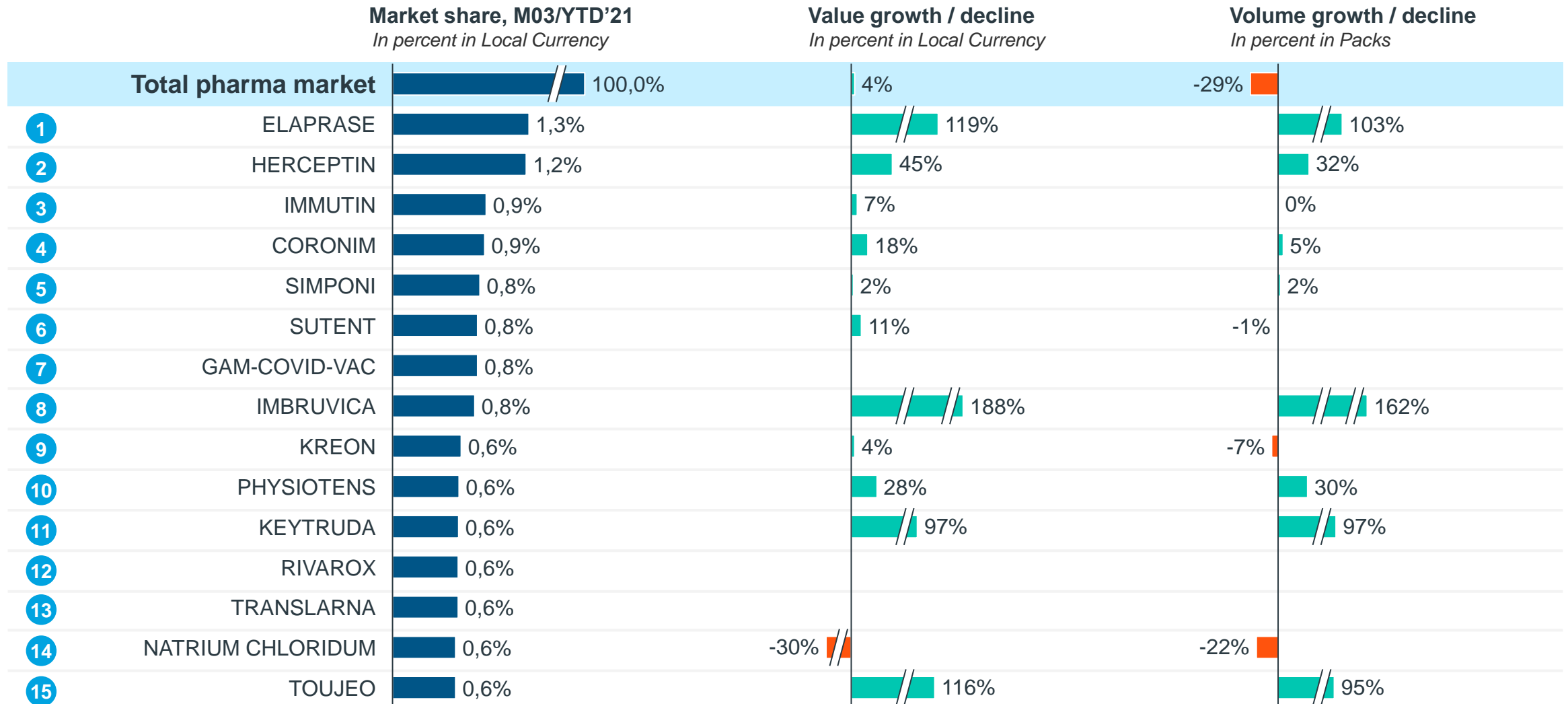
# TOP-15 corporations on Kazakhstan market, January-March 2021



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



# TOP-15 brands on Kazakhstan market, January-March 2021

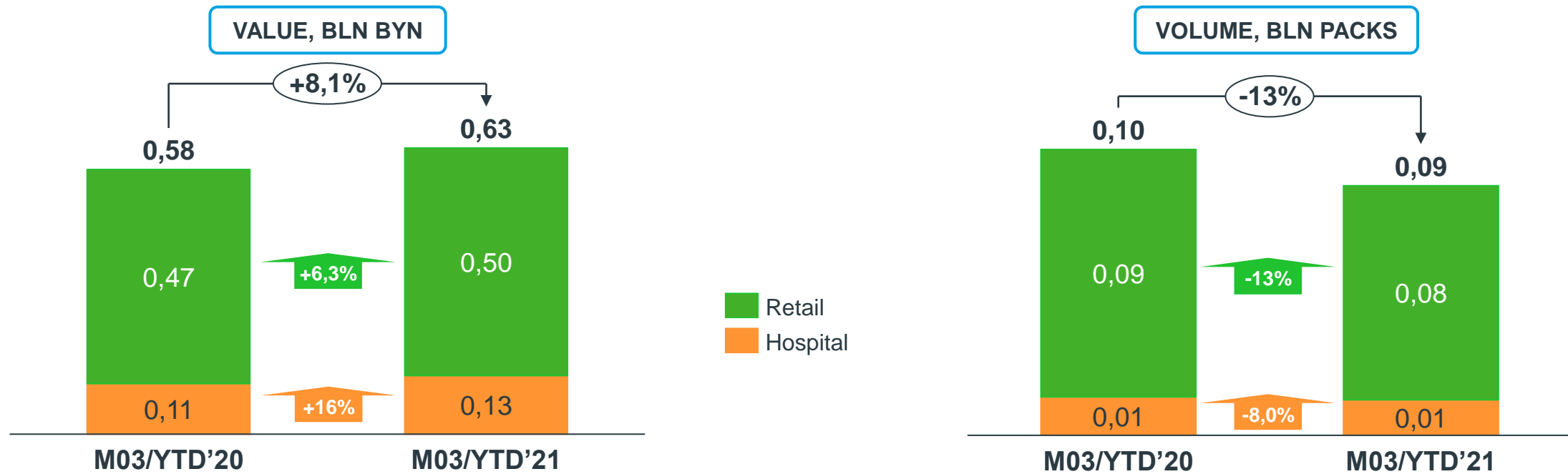






# Belarus pharma market growth in January-March 2021

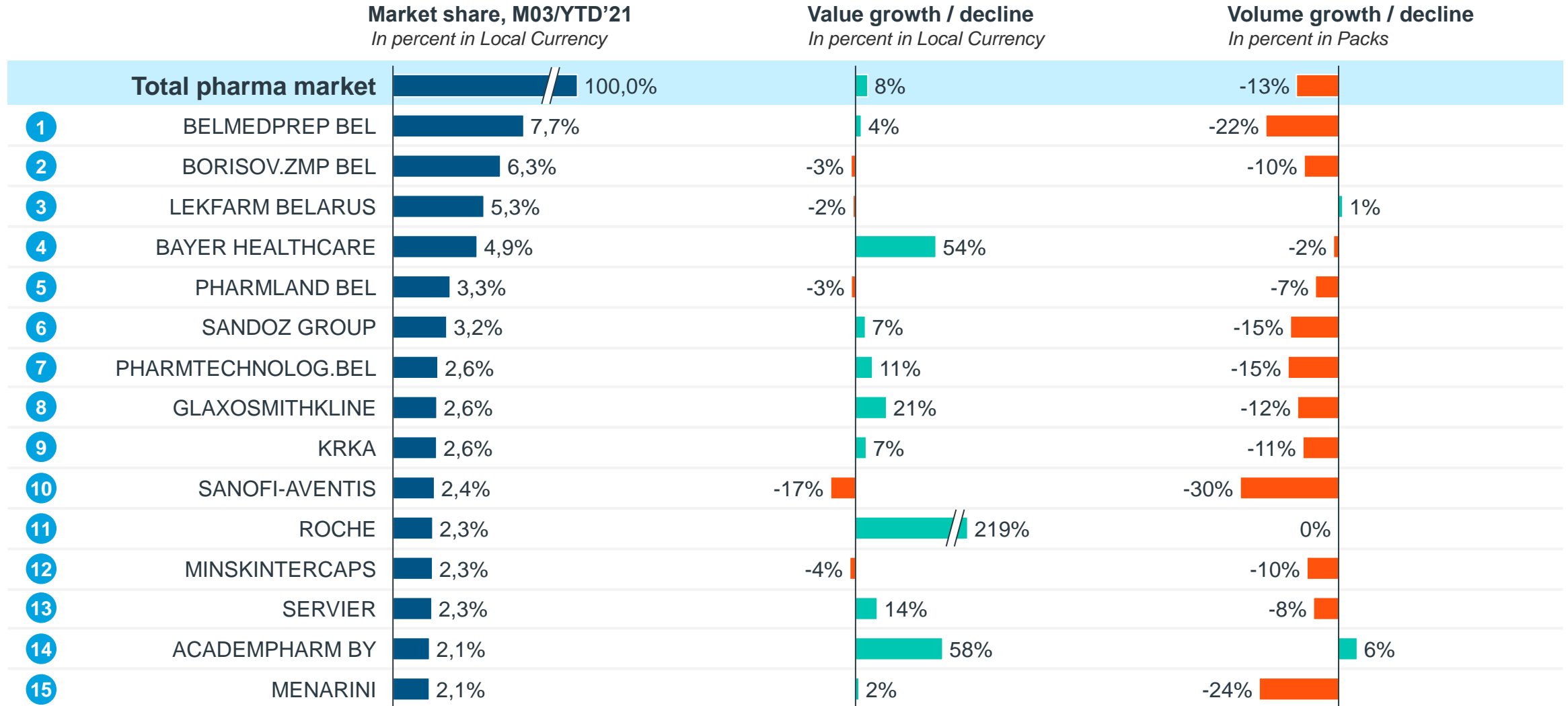
Market grew by 8,1% in value and decreased by 13% in volume



Indicator	BYN	USD	EUR	PACKS
Value M03/YTD'21, Bln.	0,63	0,24	0,20	0,09
Growth M03/YTD'21, %	▲ 8,1%	▼ -6,5%	▼ -15%	▼ -13%

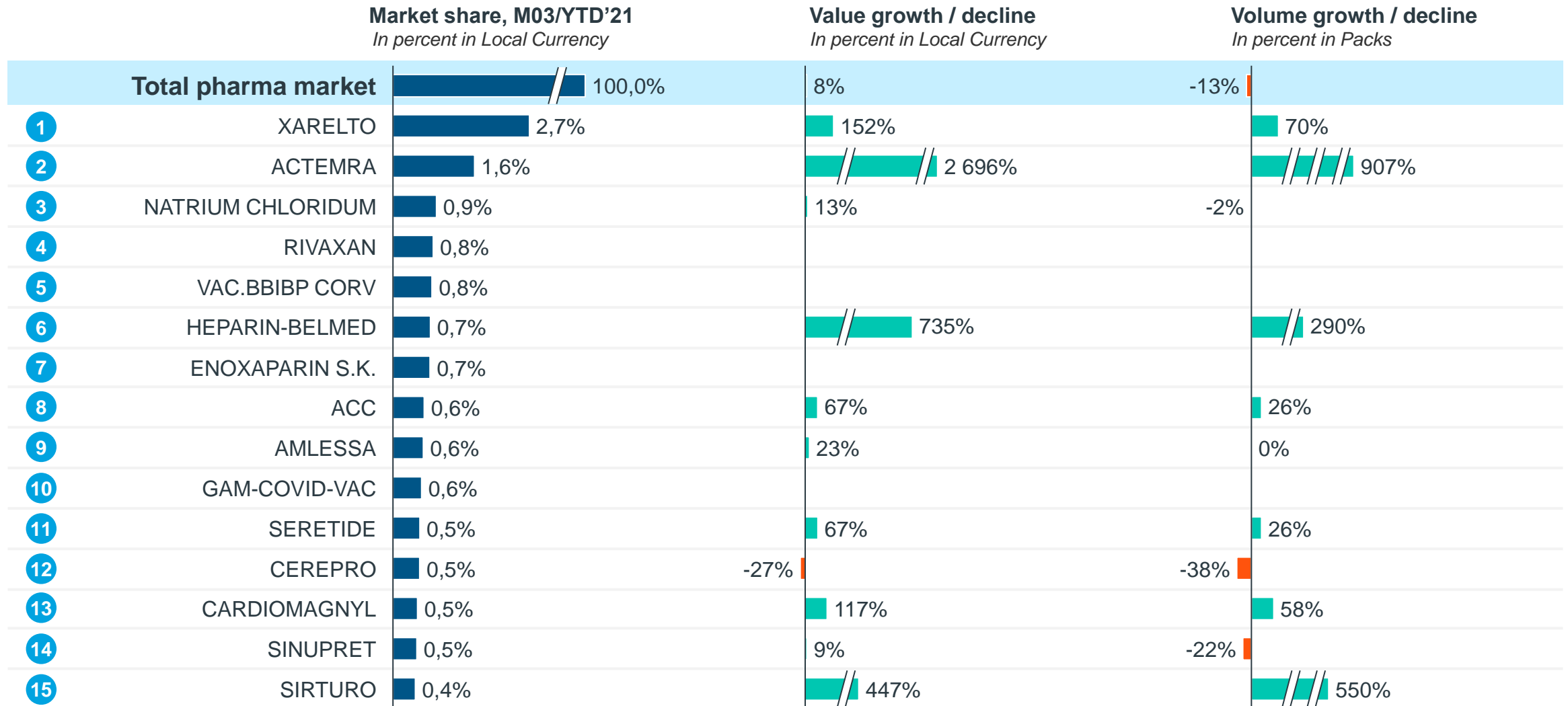


# TOP-15 corporations on Belarus market, January-March 2021





# TOP-15 brands on Belarus market, January-March 2021





# Uzbekistan pharma market growth in January-March 2021

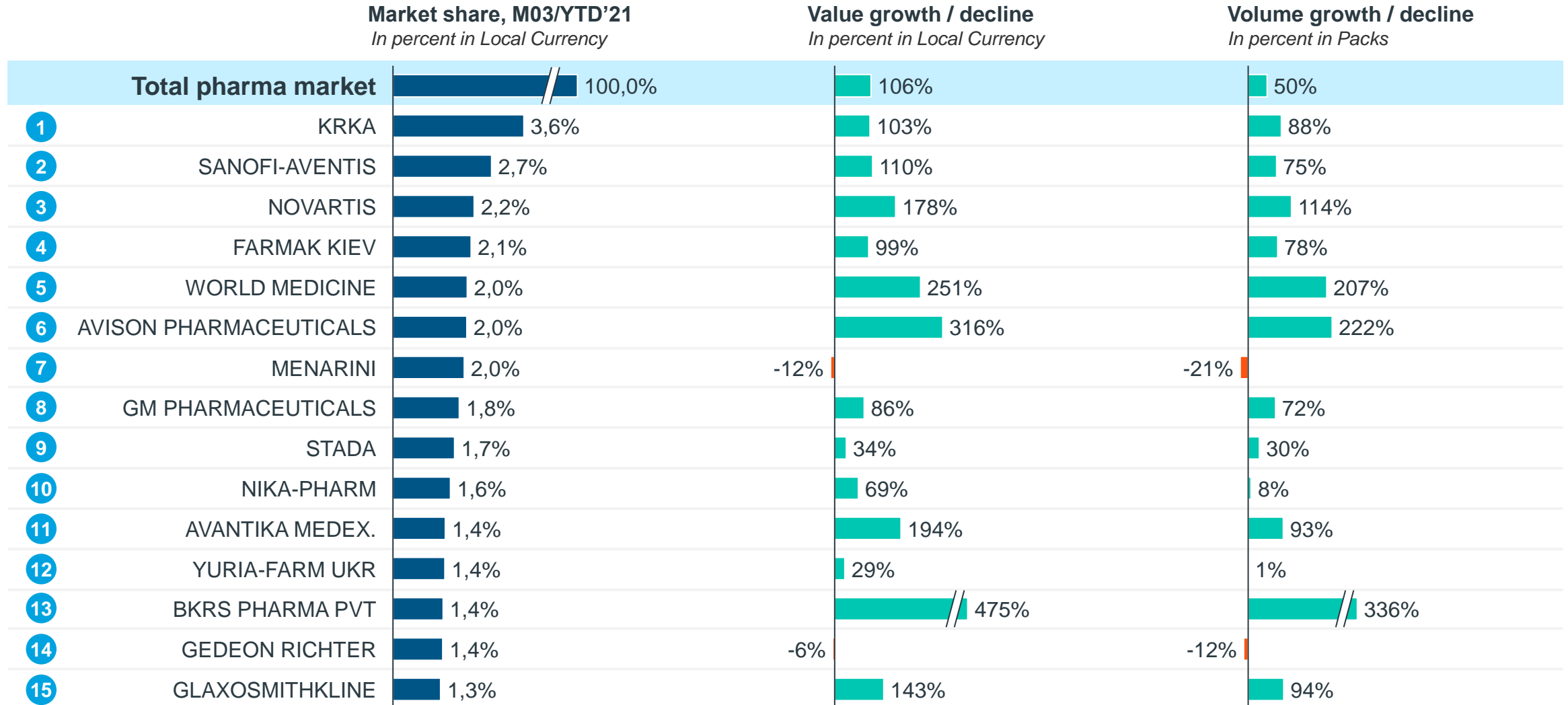
Market grew by 106% in value and by 50% in volume



Indicator	UZS	USD	EUR	PACKS
Value M03/YTD'21, Bln.	4 394	0,42	0,35	0,24
Growth M03/YTD'21, %	▲ 106%	▲ 87%	▲ 72%	▲ 50%



# TOP-15 corporations on Uzbekistan market, January-March 2021





# TOP-15 brands on Uzbekistan market, January-March 2021

		Market share, M03/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%	106%	50%
1	QUPEN	1,0%	203%	215%
2	CEFTRIAXONE	1,0%	49%	-29%
3	THERAFLU	1,0%	315%	304%
4	ACC	0,8%	347%	290%
5	DESREM	0,7%		
6	CANEPHRON N	0,6%	130%	133%
7	ACTOVEGIN	0,6%	1%	0%
8	AZIMAC	0,6%	302%	263%
9	CLEXANE	0,6%	614%	572%
10	HEPARIN	0,6%	588%	12%
11	VIFERON	0,6%	55%	36%
12	CEFOPERAZONE+SULBACTAM	0,6%		
13	QUACEF NEO	0,5%		
14	TIVORTIN	0,5%	172%	171%
15	DEXAMETHASONE	0,5%	269%	143%

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



# Kyrgyzstan pharma market growth in January-March 2021

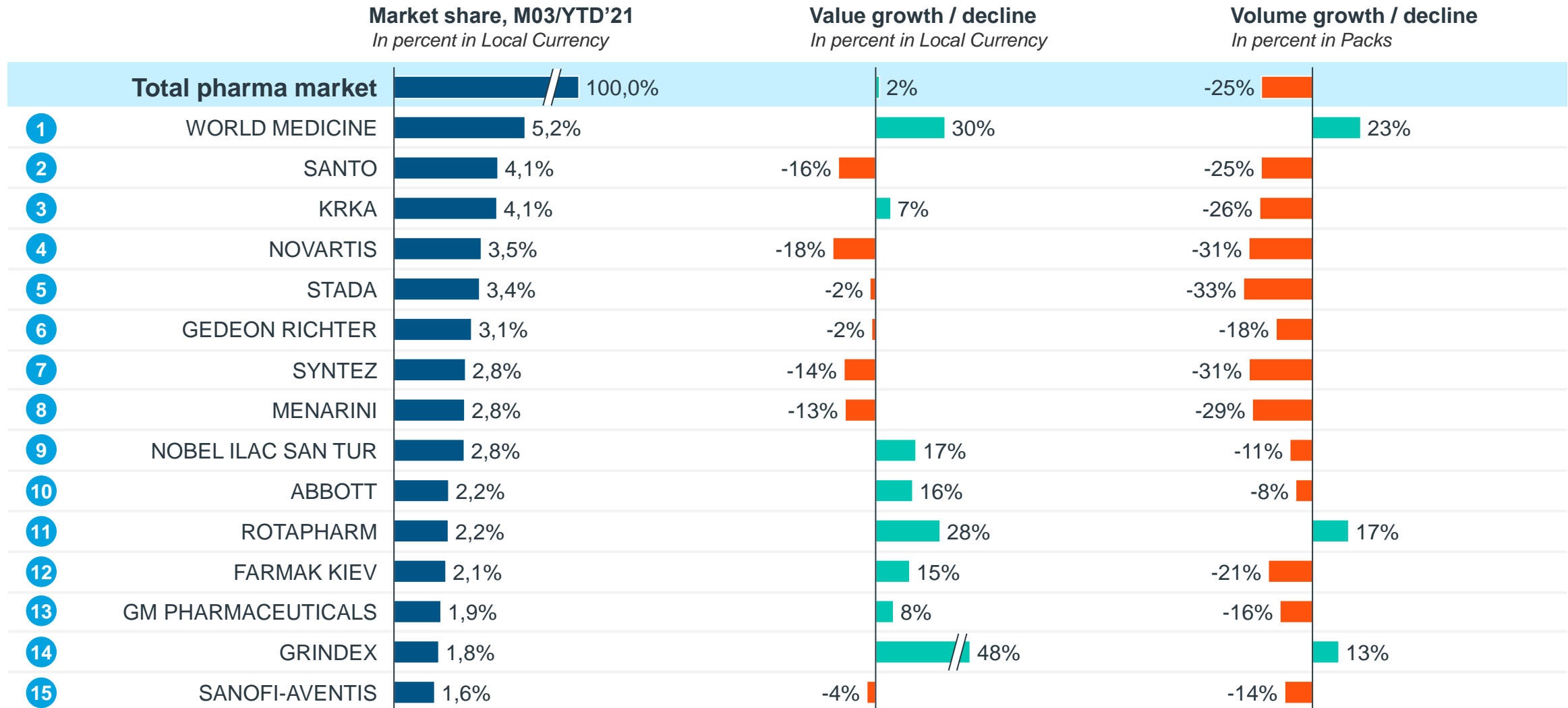
Market grew by 1,6% in value and decreased by 25% in volume



Indicator	KGS	USD	EUR	PACKS
Value M03/YTD'21, Bln.	3,6	0,04	0,04	0,04
Growth M03/YTD'21%	▲ 1,6%	▼ -14%	▼ -21%	▼ -25%



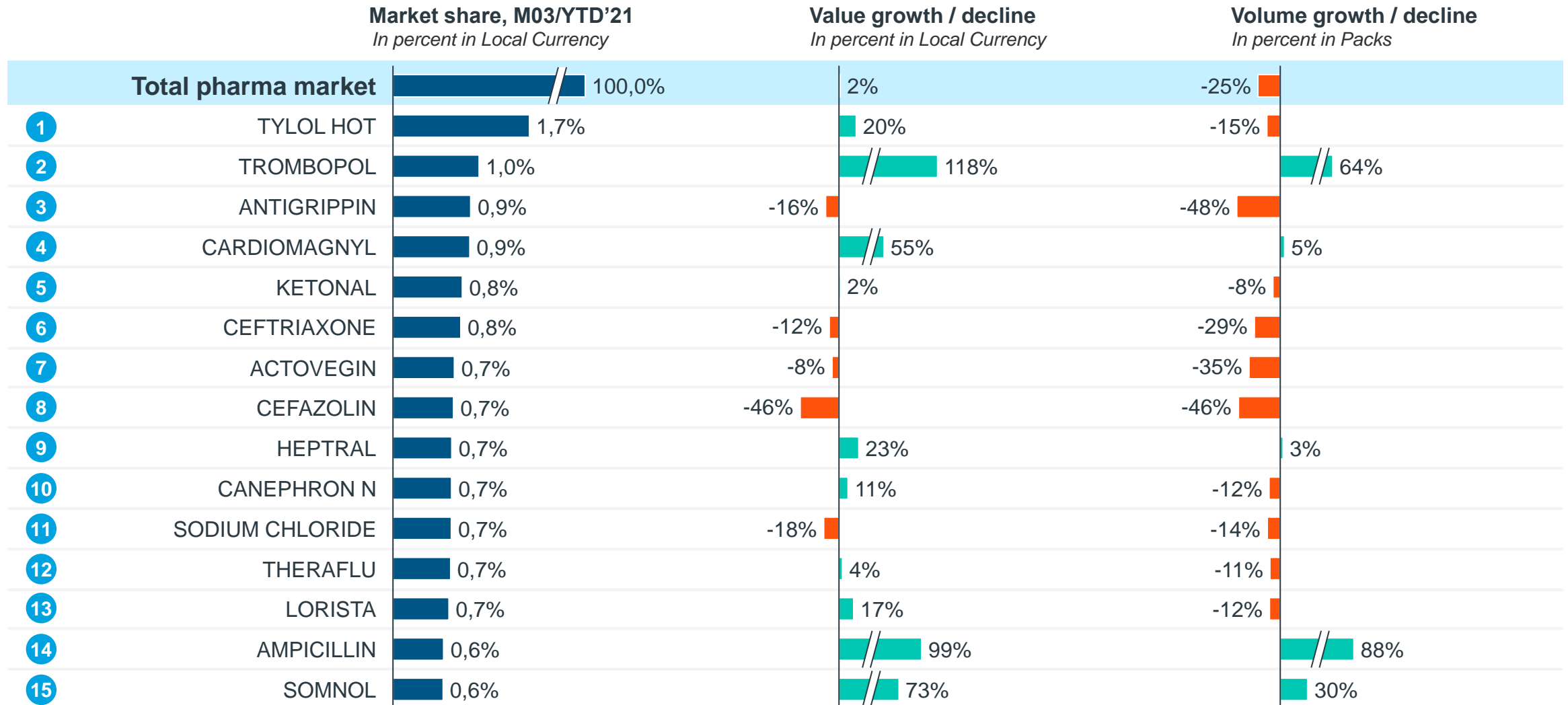
# TOP-15 corporations on Kyrgyzstan market, January-March 2021







# TOP-15 brands on Kyrgyzstan market, January-March 2021



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

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