

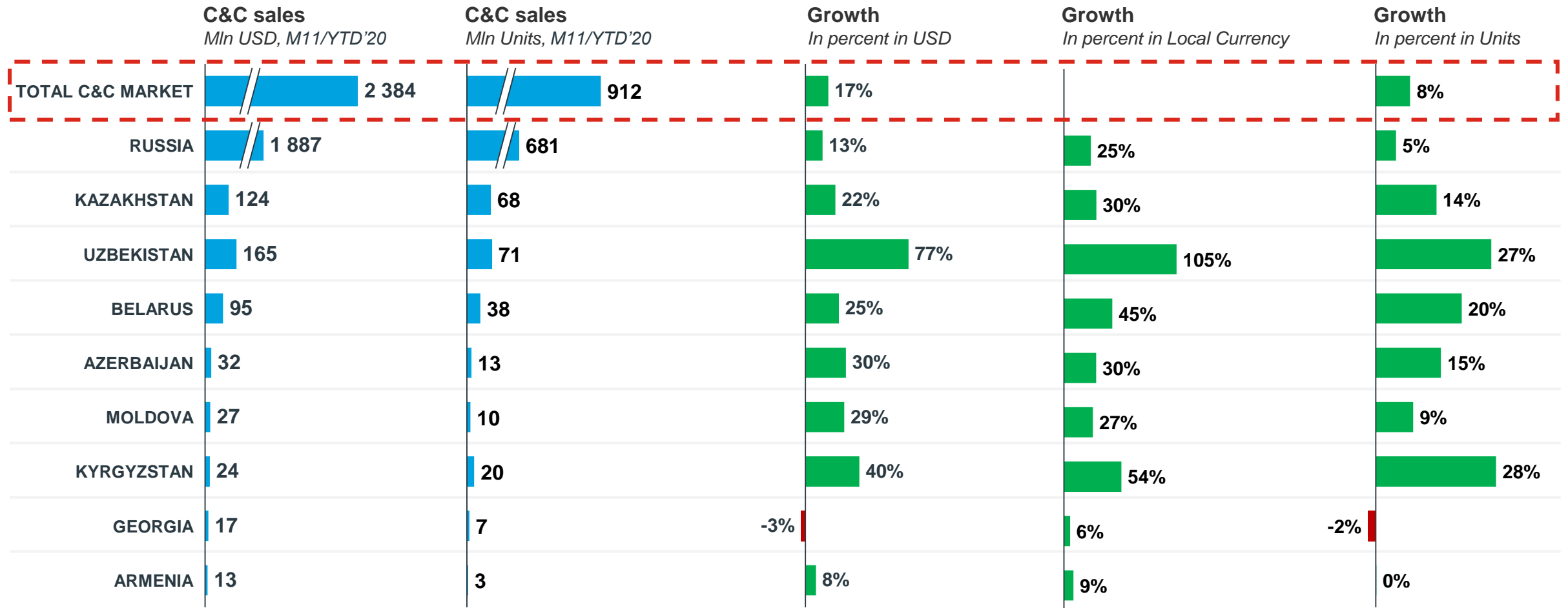


# Facts from IQVIA

M11 2020

# EAEU & CIS, Russia Cough&Cold category in January-November 2020, Value in Mln. USD and Units

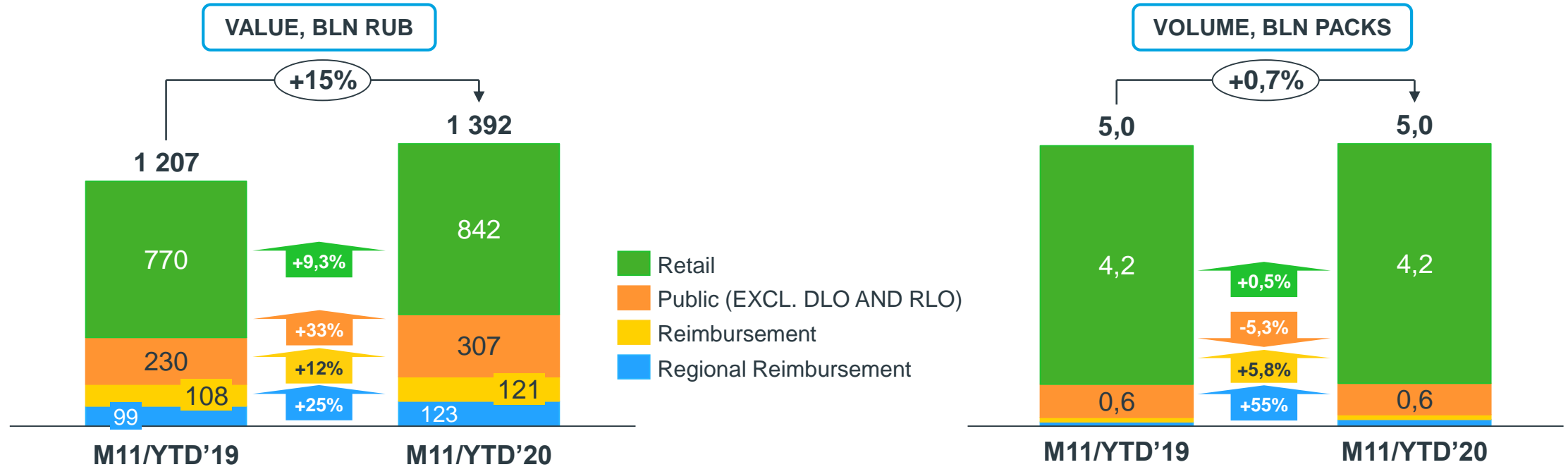
C&C increases by 17% in USD and by 8% in volume





# Russian pharma market growth in January-November 2020

Market grew by 15% in value and by 0,7% in volume

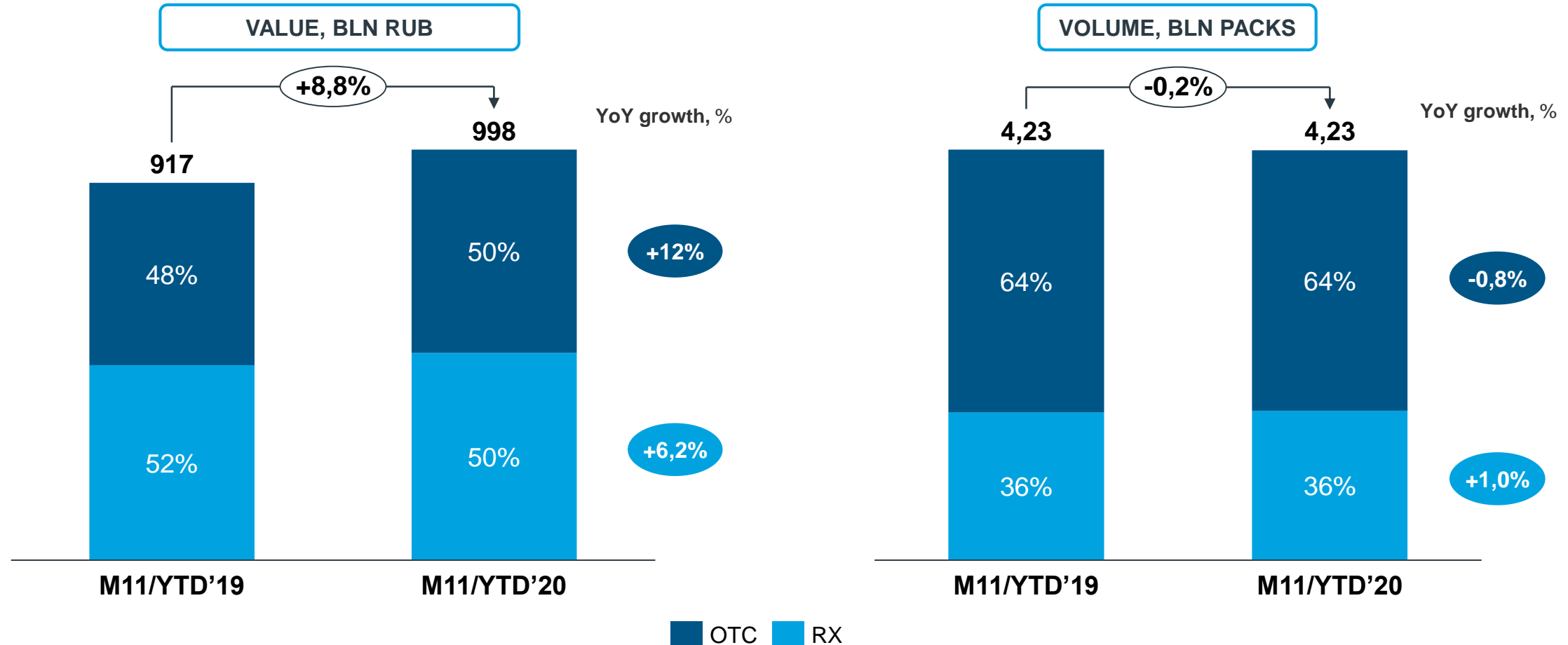


Indicator	RUB	USD	EUR	PACKS
Value M11/YTD'20, Bln.	1 392	19	17	5,0
Growth M11/YTD'20%	▲ 15%	▲ 4,0%	▲ 2,8%	▲ 0,7%



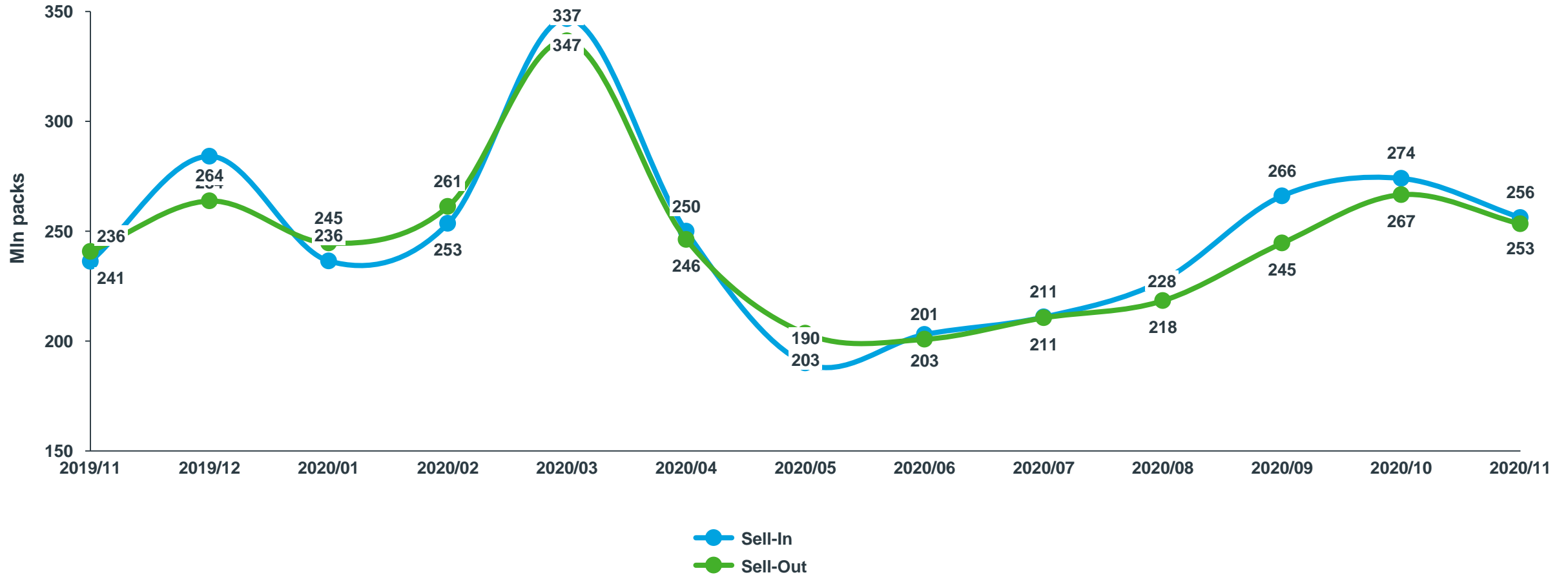
# Russian pharma market growth in January-November 2020

*Retail Sell-Out: Market grew by 8,8% in value and decreased by 0,2% in volume*



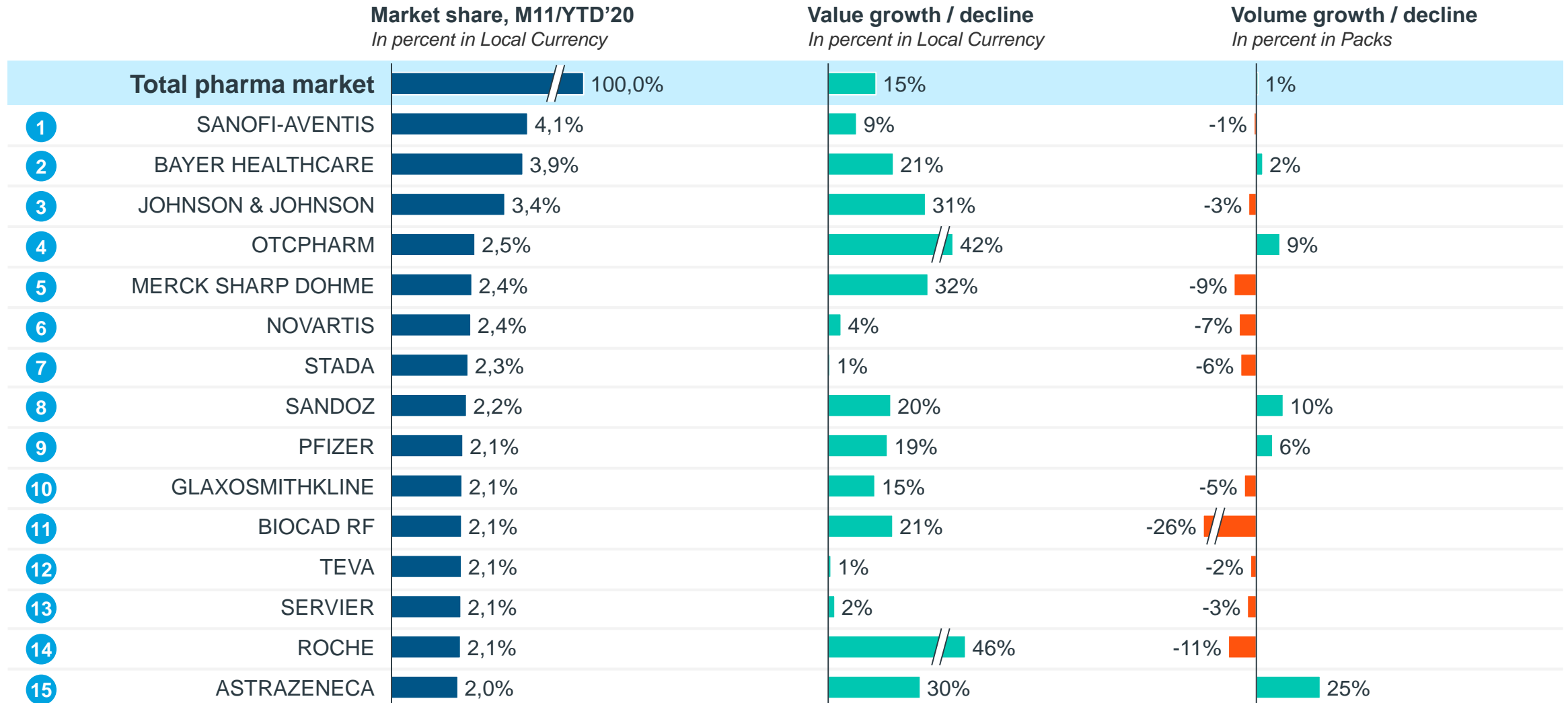


# Sell-In vs Sell-Out, OTC registered drugs





# TOP-15 corporations on Russian market, January-November 2020

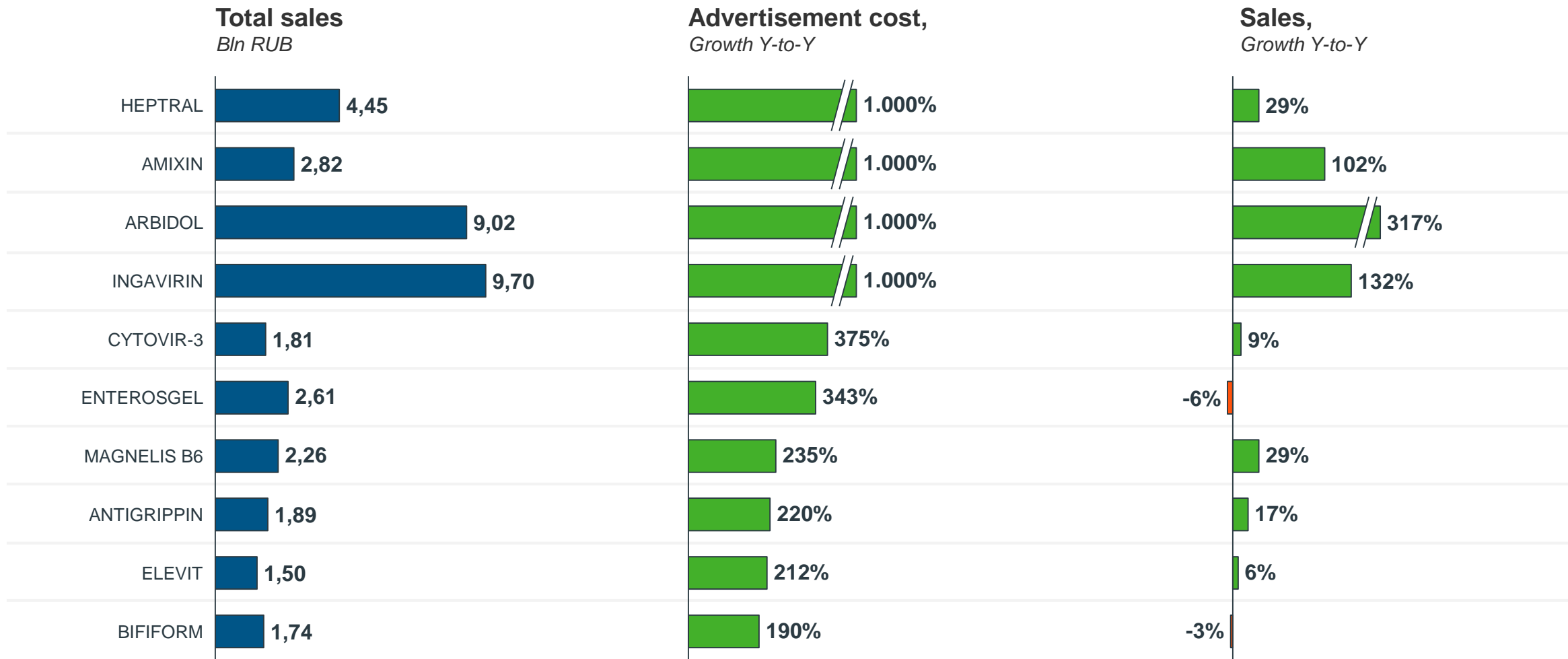




# TOP-15 brands on Russian market, January-November 2020

		Market share, M11/YTD'20 <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%	15%	1%
1	XARELTO	1,2%	78%	51%
2	OPDIVO	0,9%	86%	82%
3	KEYTRUDA	0,8%	86%	85%
4	REVLIMIDE	0,7%	23%	41%
5	INGAVIRIN	0,7%	144%	81%
6	SOVIGRIPP	0,6%	37%	-19%
7	ARBIDOL	0,6%	364%	263%
8	AVEGRA BIOCAD	0,6%	45%	19%
9	ELIQUIS	0,6%	106%	112%
10	ELIZARIA	0,6%	49%	50%
11	SPINRAZA	0,5%	9 208%	9 220%
12	PRADAXA	0,5%	60%	58%
13	TIVICAY	0,5%	84%	150%
14	TOUJEO SOLOSTAR	0,4%	16%	12%
15	PERJETA	0,4%	47%	47%

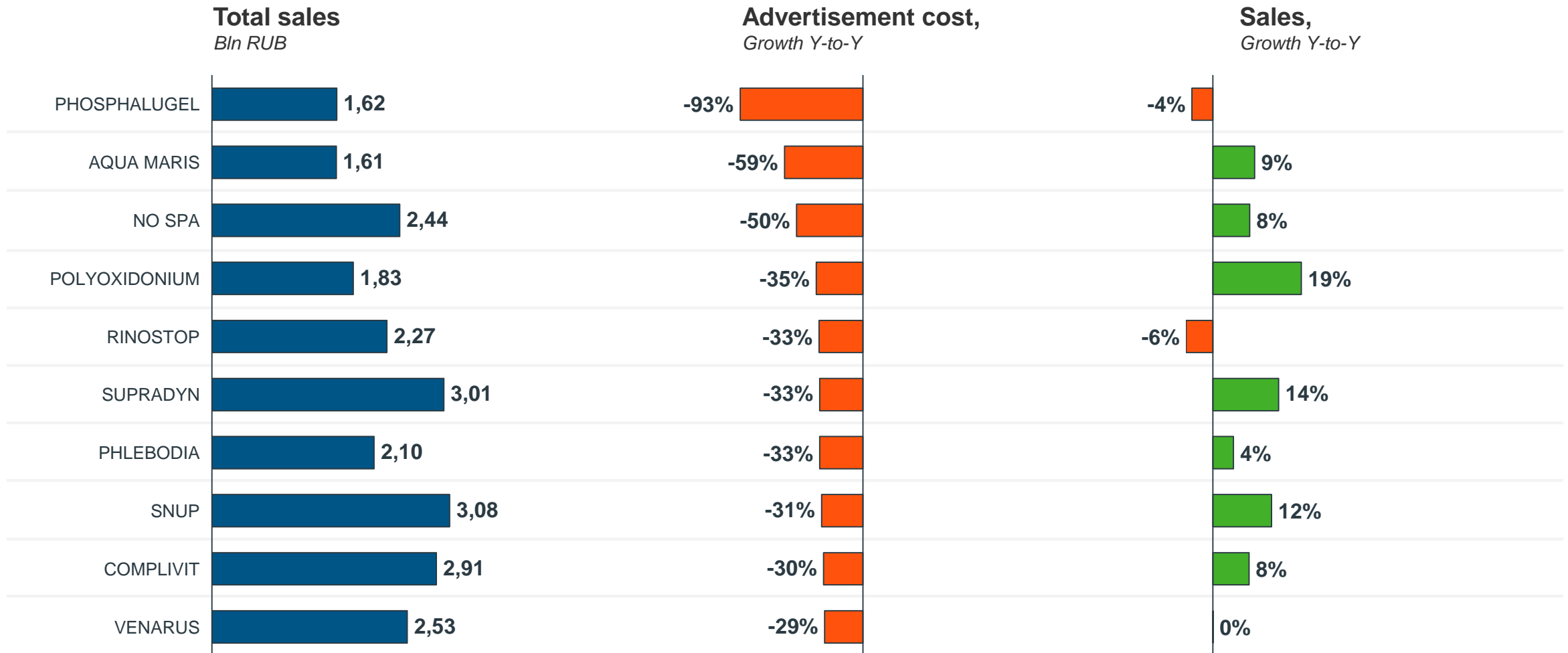
# TOP-10 products by growth in advertisement investments in January-November 2020



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-November 2020

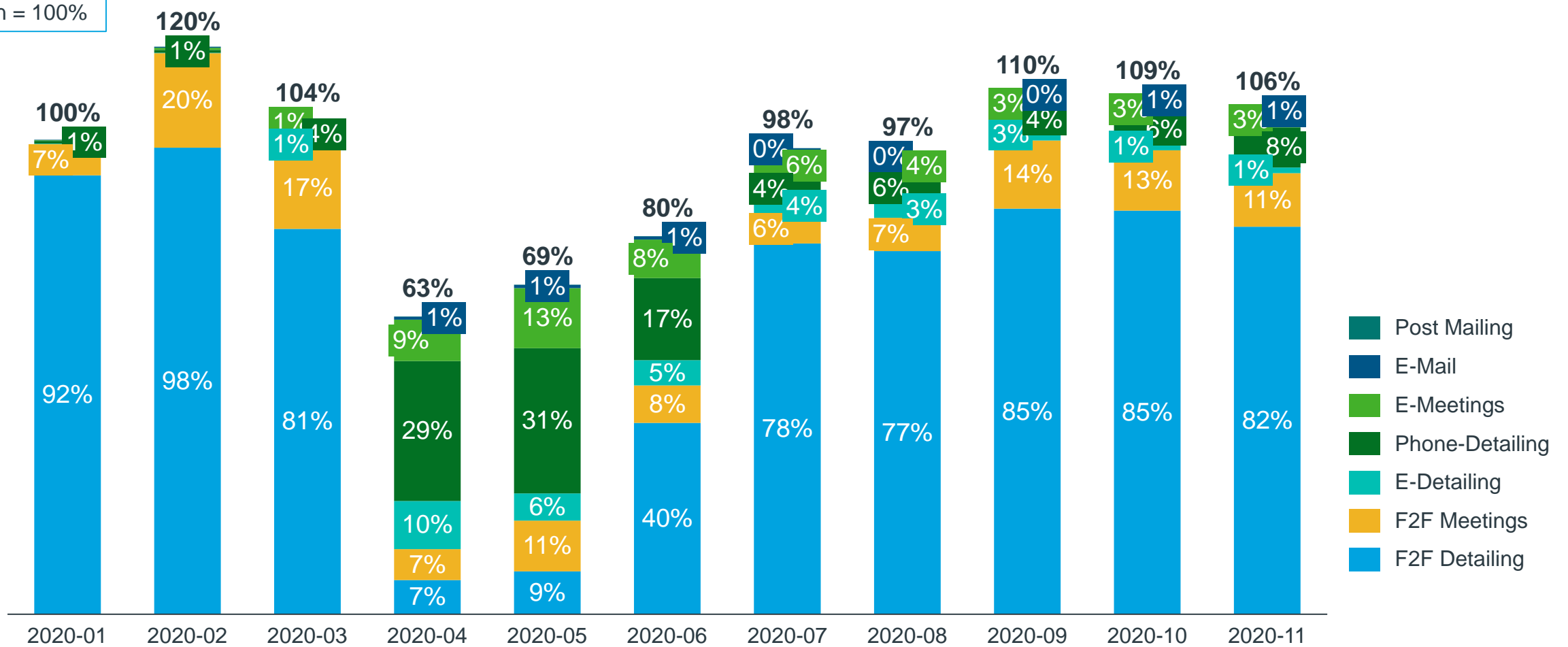


The rank is calculated among TOP-200 Brands by sales with advertising cost greater than 50 mln RUB  
 Source: IQVIA databases, Pharmatrend, Mediascope data, FIN Prices



# Structure of promotion, January-November 2020

Jan = 100%

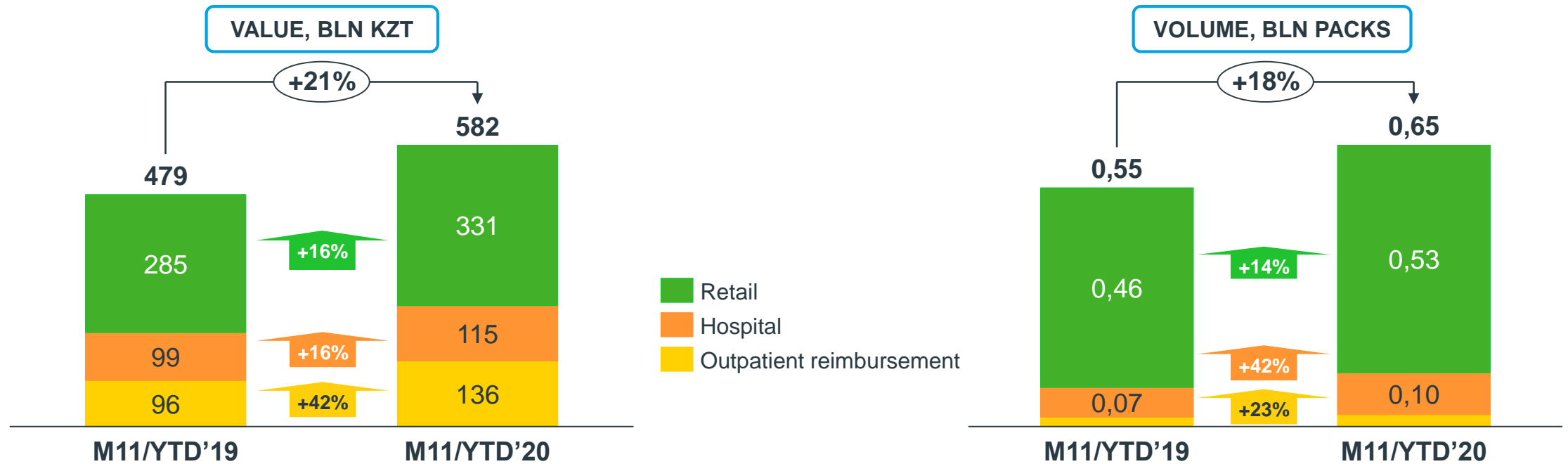


Source: IQVIA Russia, Channel Dynamics promo evaluation



# Kazakhstan pharma market growth in January-November 2020

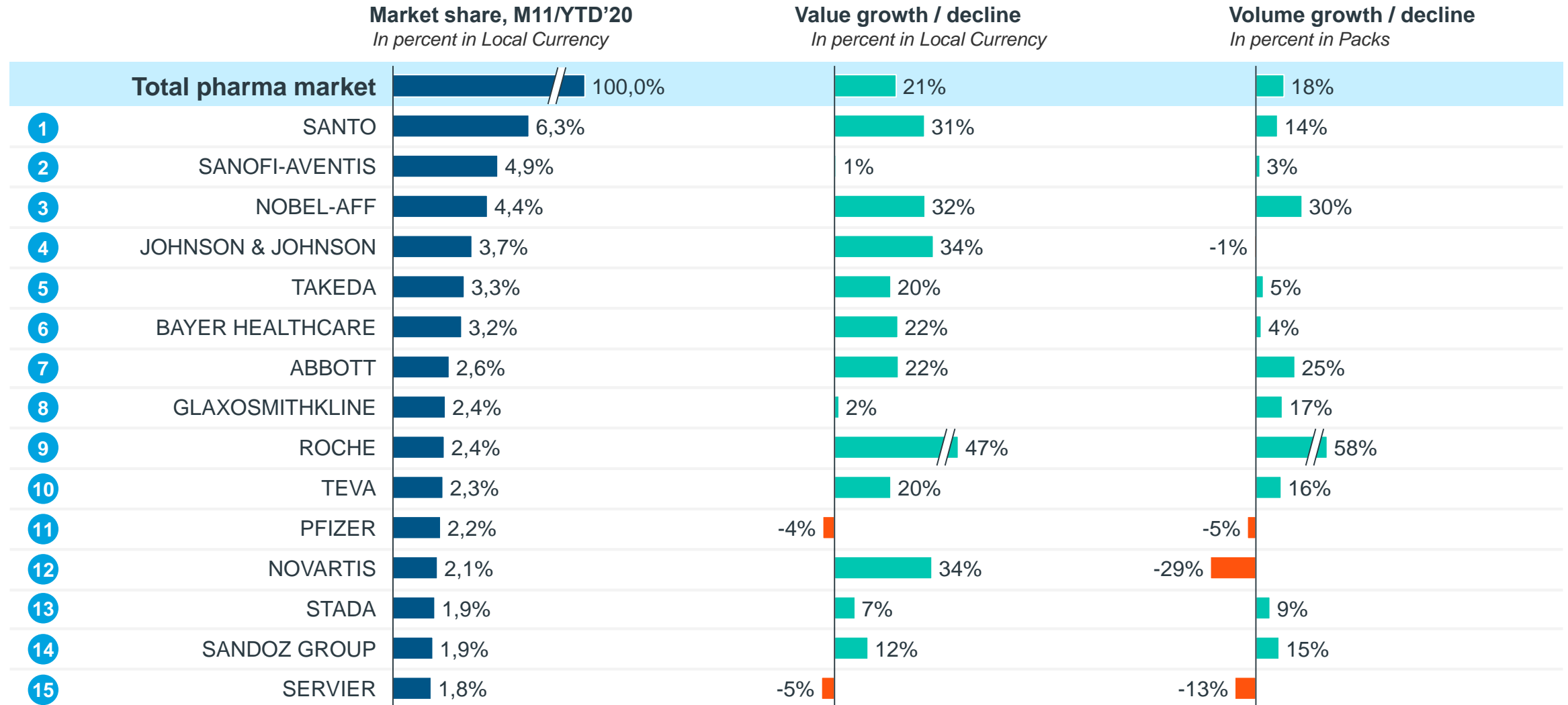
Market grew by 21% in value and by 18% in volume



Indicator	KZT	USD	EUR	PACKS
Value M11/YTD'20, Bln.	582	1,41	1,25	0,65
Growth M11/YTD'20%	▲ 21%	▲ 13%	▲ 12%	▲ 18%



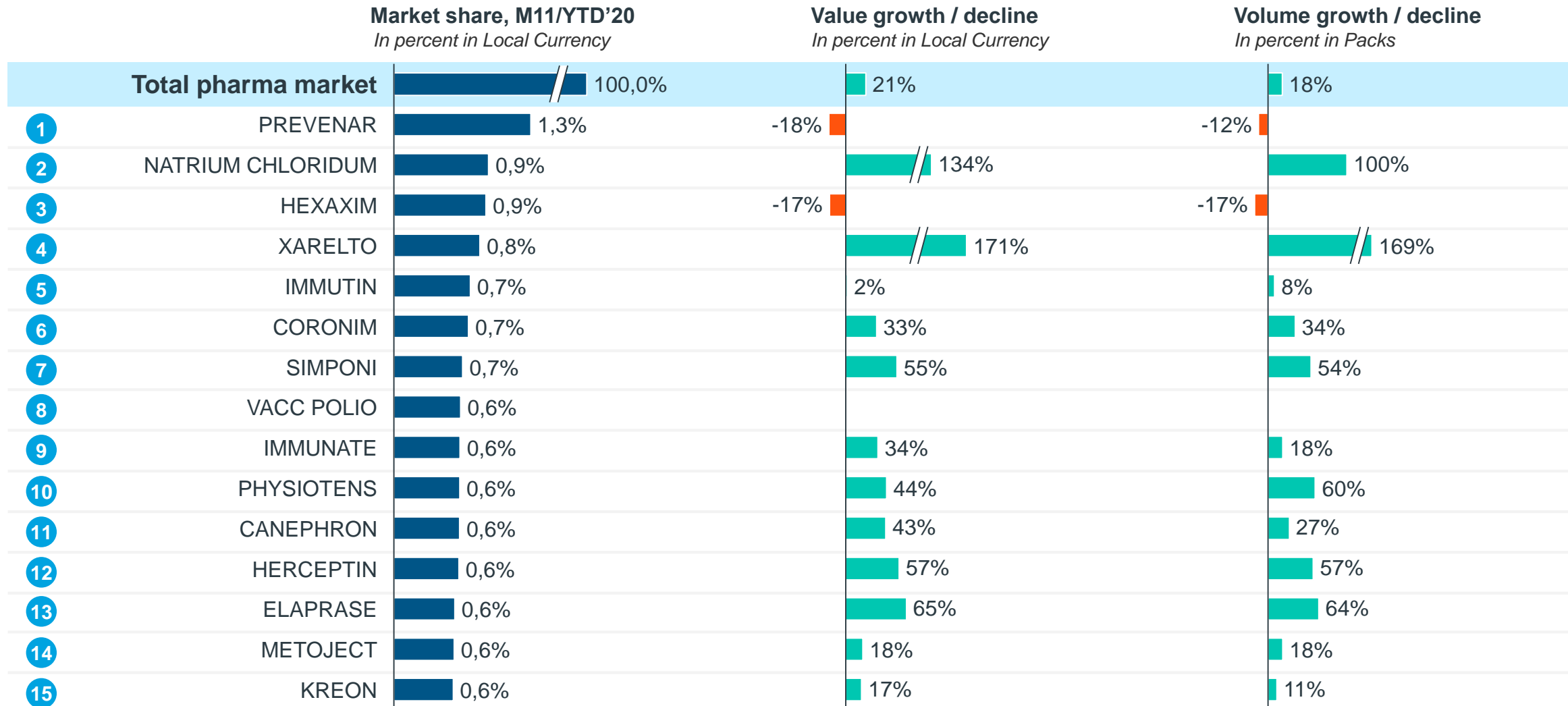
# TOP-15 corporations on Kazakhstan market, January-November 2020



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



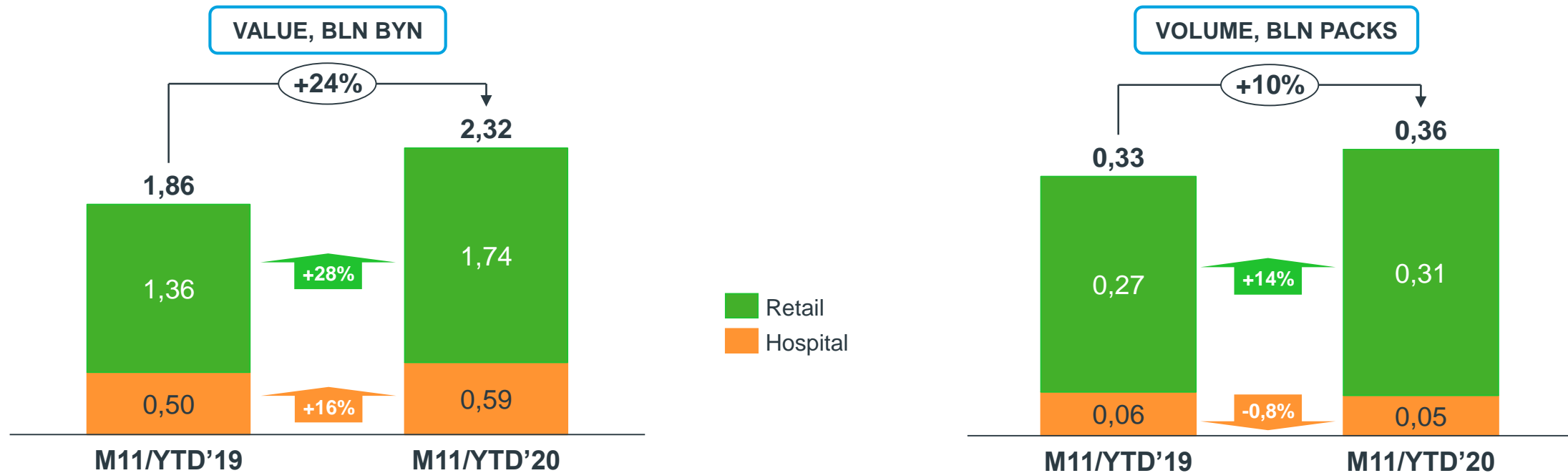
# TOP-15 brands on Kazakhstan market, January-November 2020





# Belarus pharma market growth in January-November 2020

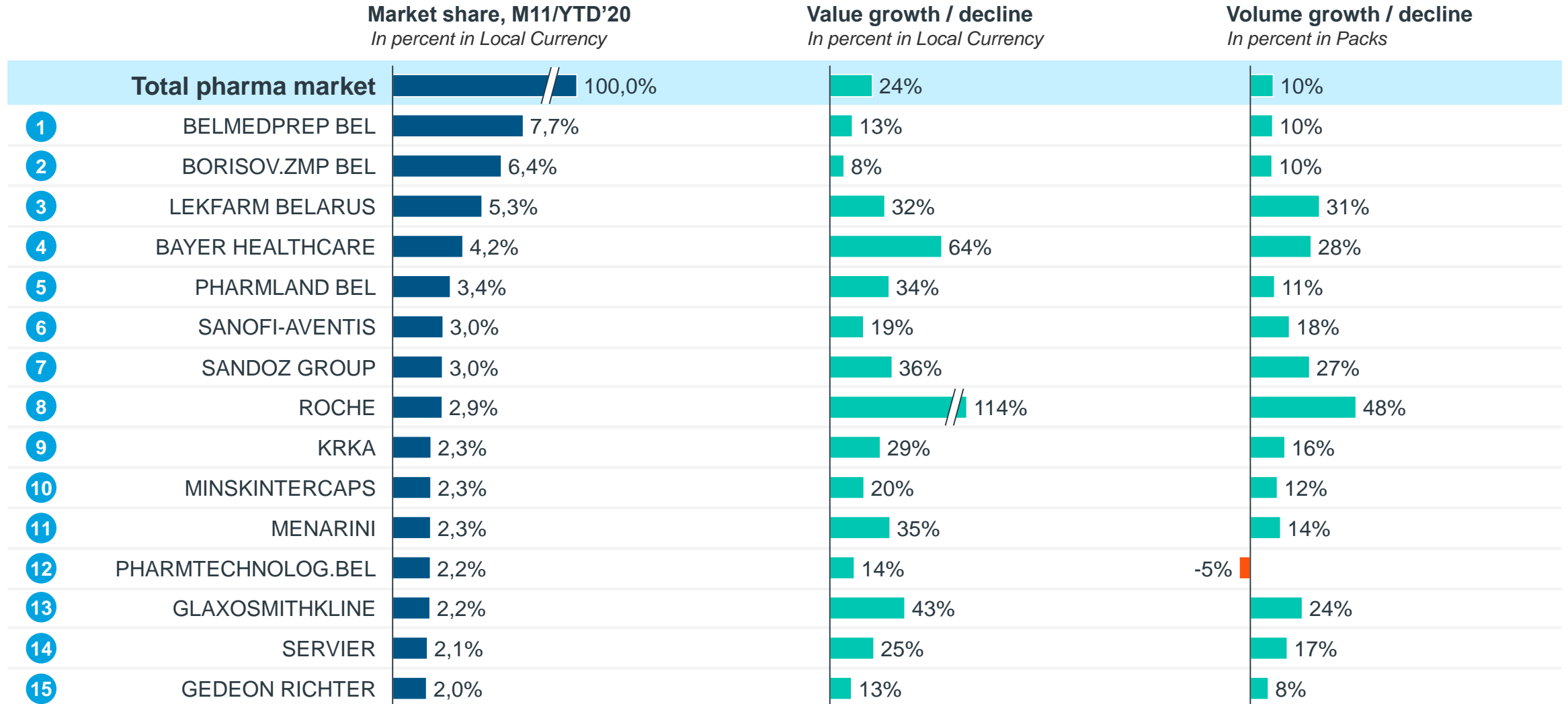
Market grew by 24% in value and by 10% in volume



Indicator	BYN	USD	EUR	PACKS
Value M11/YTD'20, Bln.	2,32	0,95	0,84	0,36
Growth M11/YTD'20%	▲ 24%	▲ 6,9%	▲ 5,6%	▲ 10%

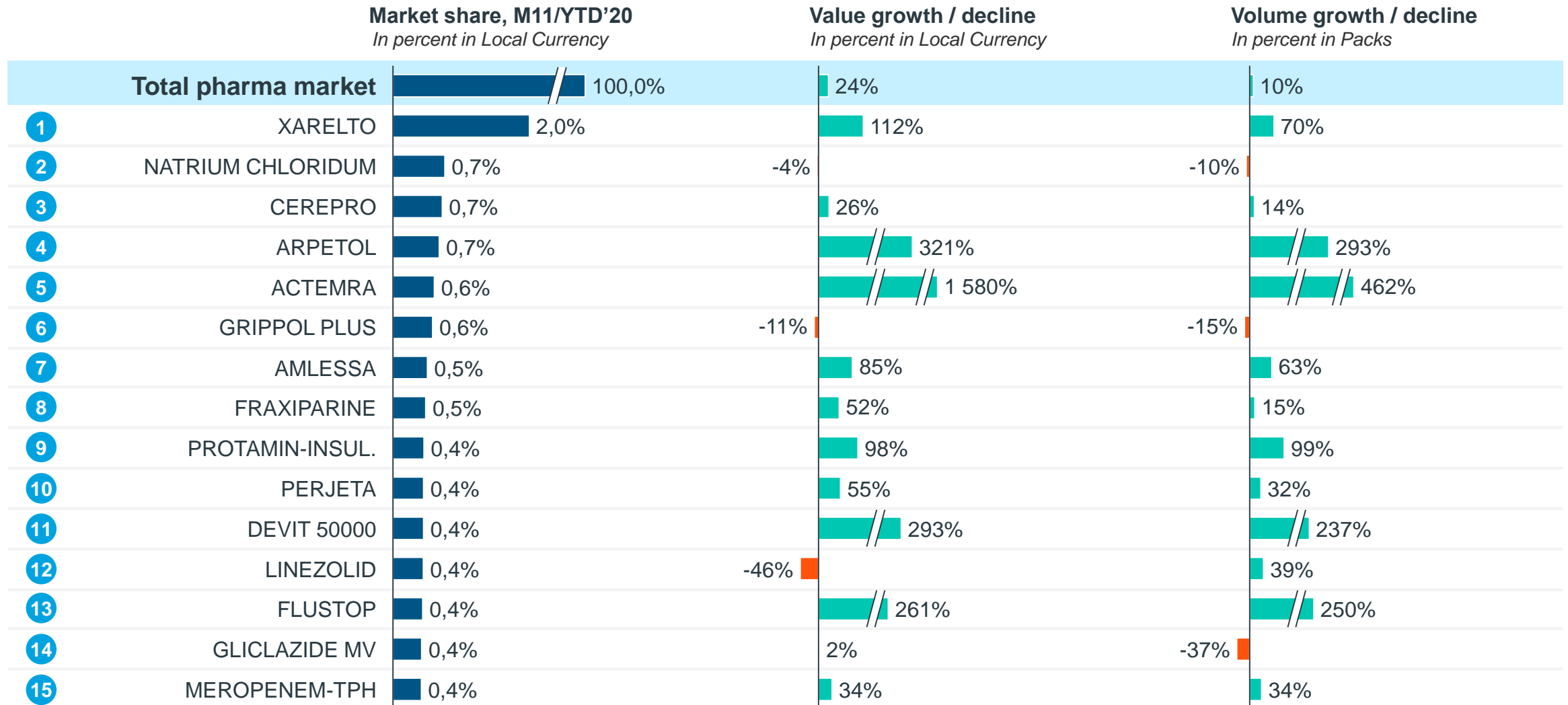


# TOP-15 corporations on Belarus market, January-November 2020





# TOP-15 brands on Belarus market, January-November 2020

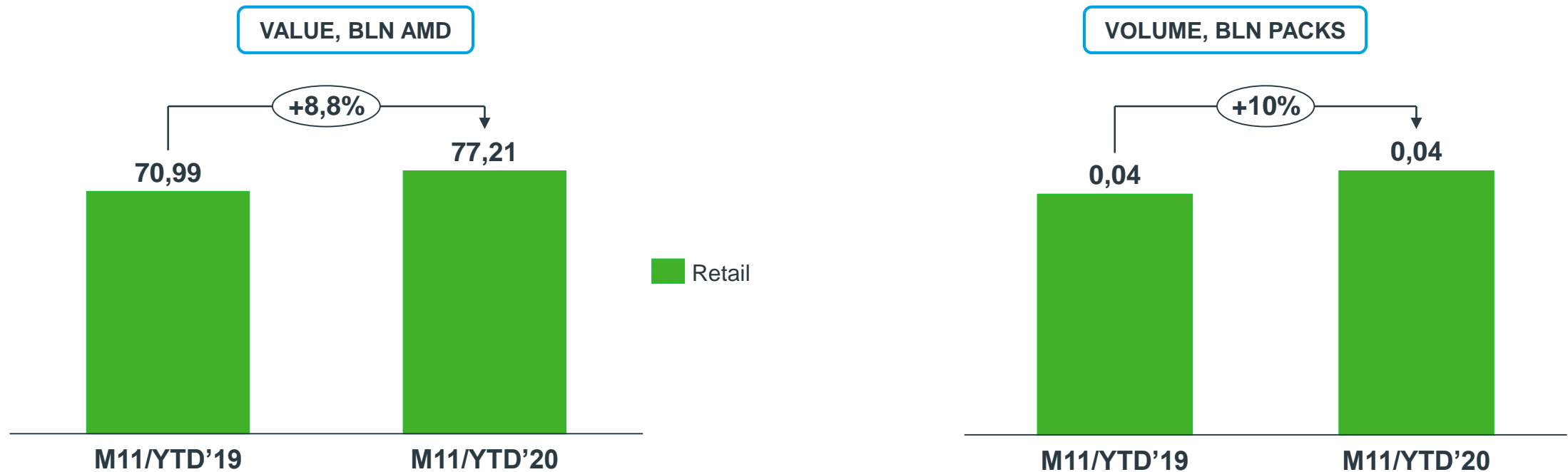






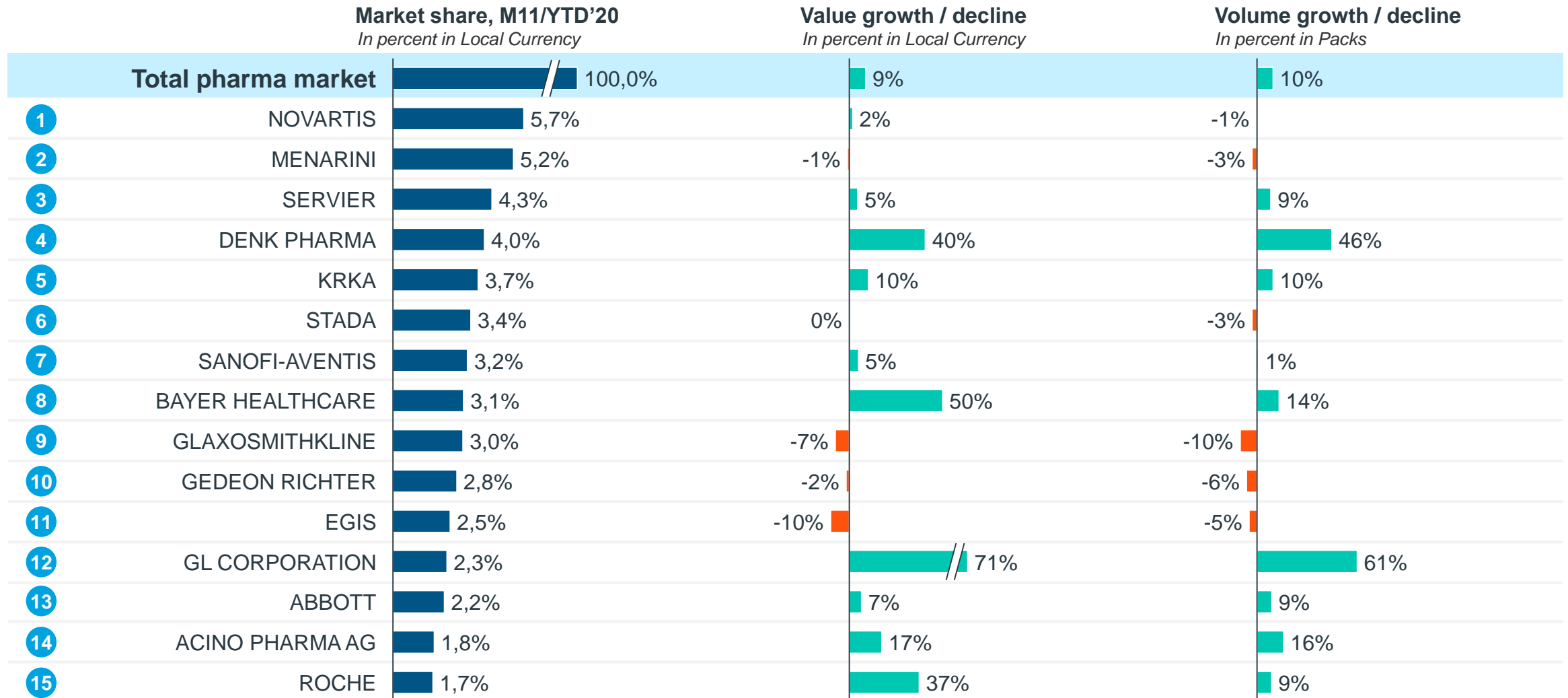
# Armenia pharma market growth in January-November 2020

Market increased by 8,8% in value and by 10% in volume

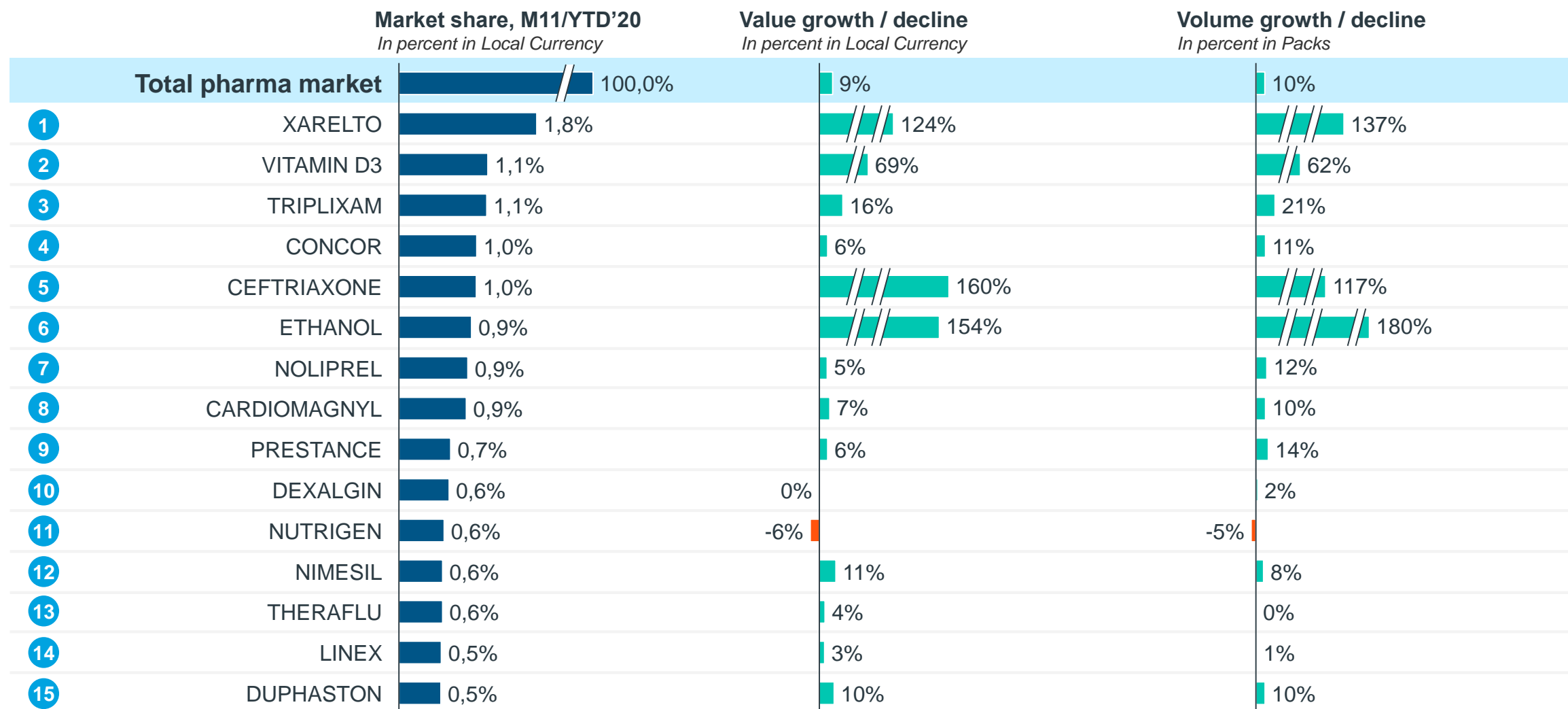


Indicator	AMD	USD	EUR	PACKS
Value M11/YTD'20, Bln.	77,2	0,2	0,1	0,04
Growth M11/YTD'20%	▲ 8,8%	▲ 7,4%	▲ 5,8%	▲ 10%

# TOP-15 corporations on Armenia market, January-November 2020



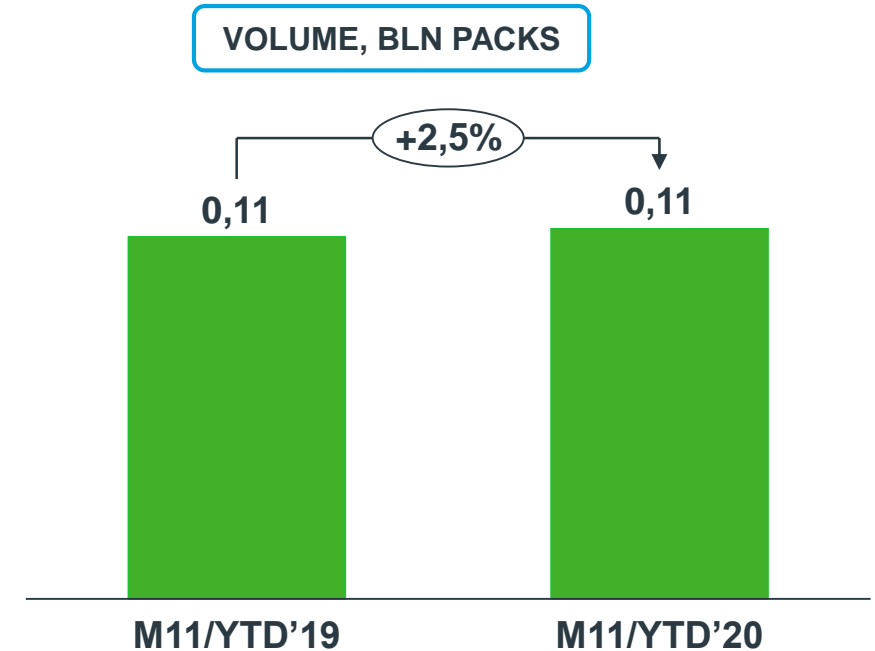
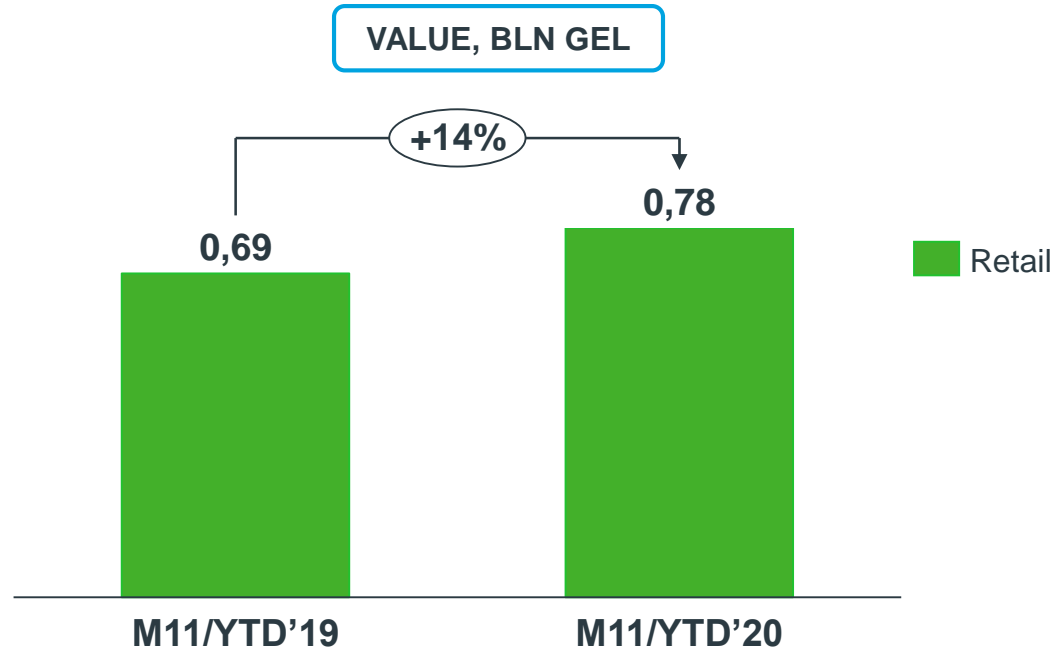
# TOP-15 brands on Armenia market, January-November 2020





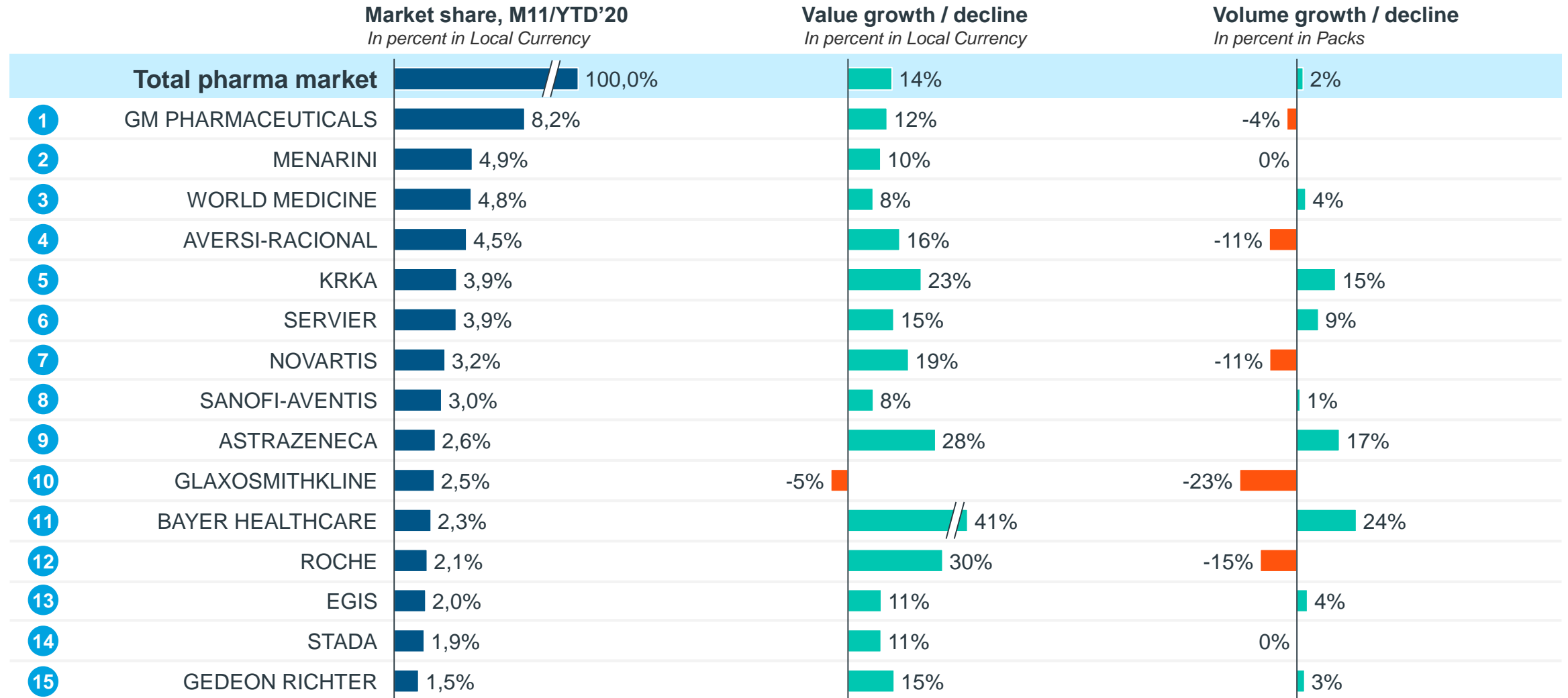
# Georgia pharma market growth in January-November 2020

Market grew by 14% in value and by 2,5% in volume

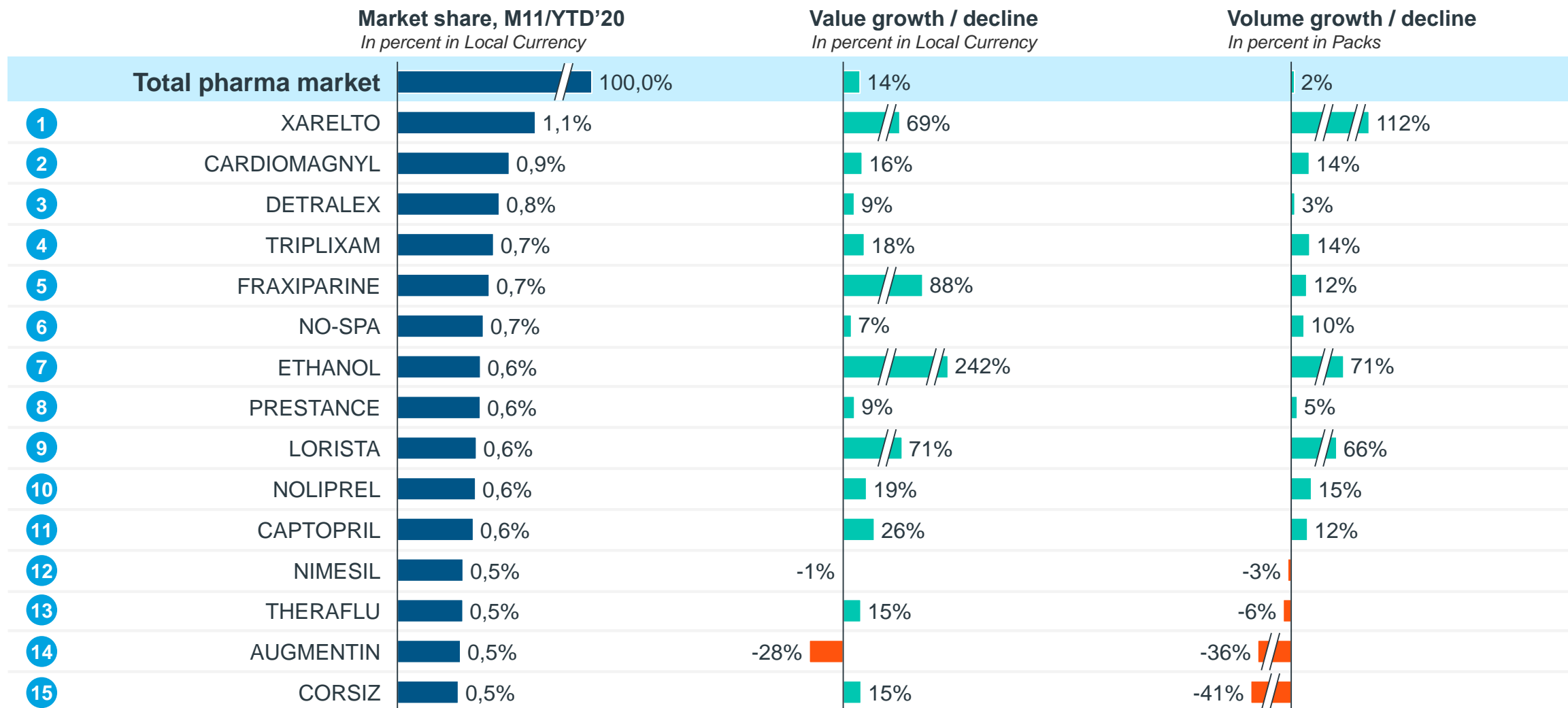


Indicator	GEL	USD	EUR	PACKS
Value M11/YTD'20, Bln.	0,8	0,3	0,2	0,11
Growth M11/YTD'20%	▲ 14%	▲ 3,7%	▲ 2,5%	▲ 2,5%

# TOP-15 corporations on Georgia market, January-November 2020



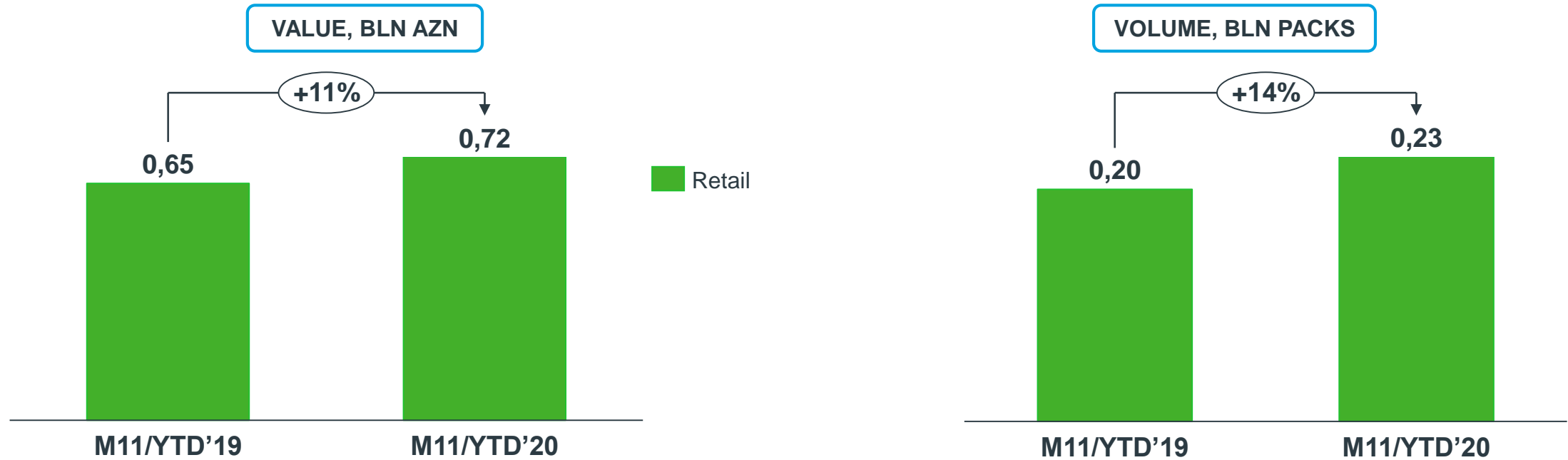
# TOP-15 brands on Georgia market, January-November 2020





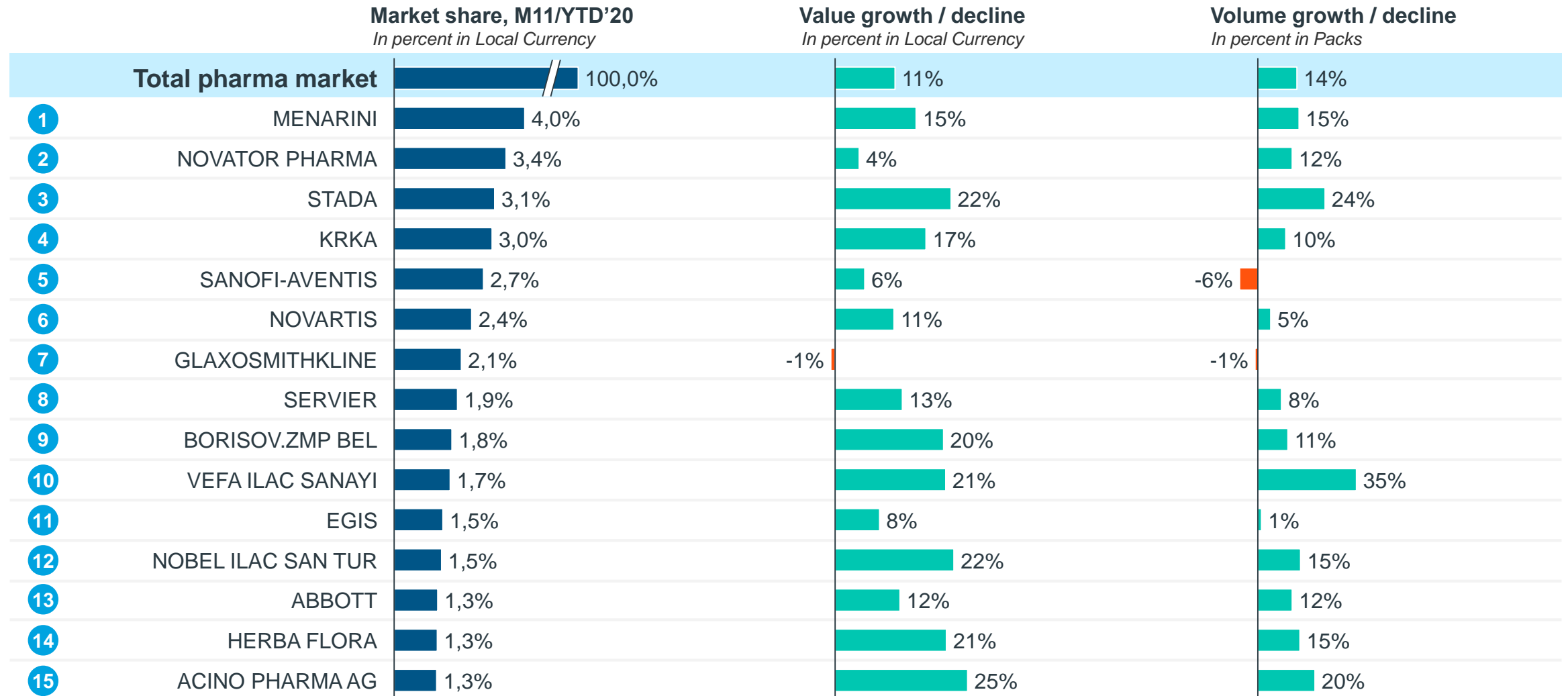
# Azerbaijan pharma market growth in January-November 2020

Market grew by 11% in value and by 14% in volume



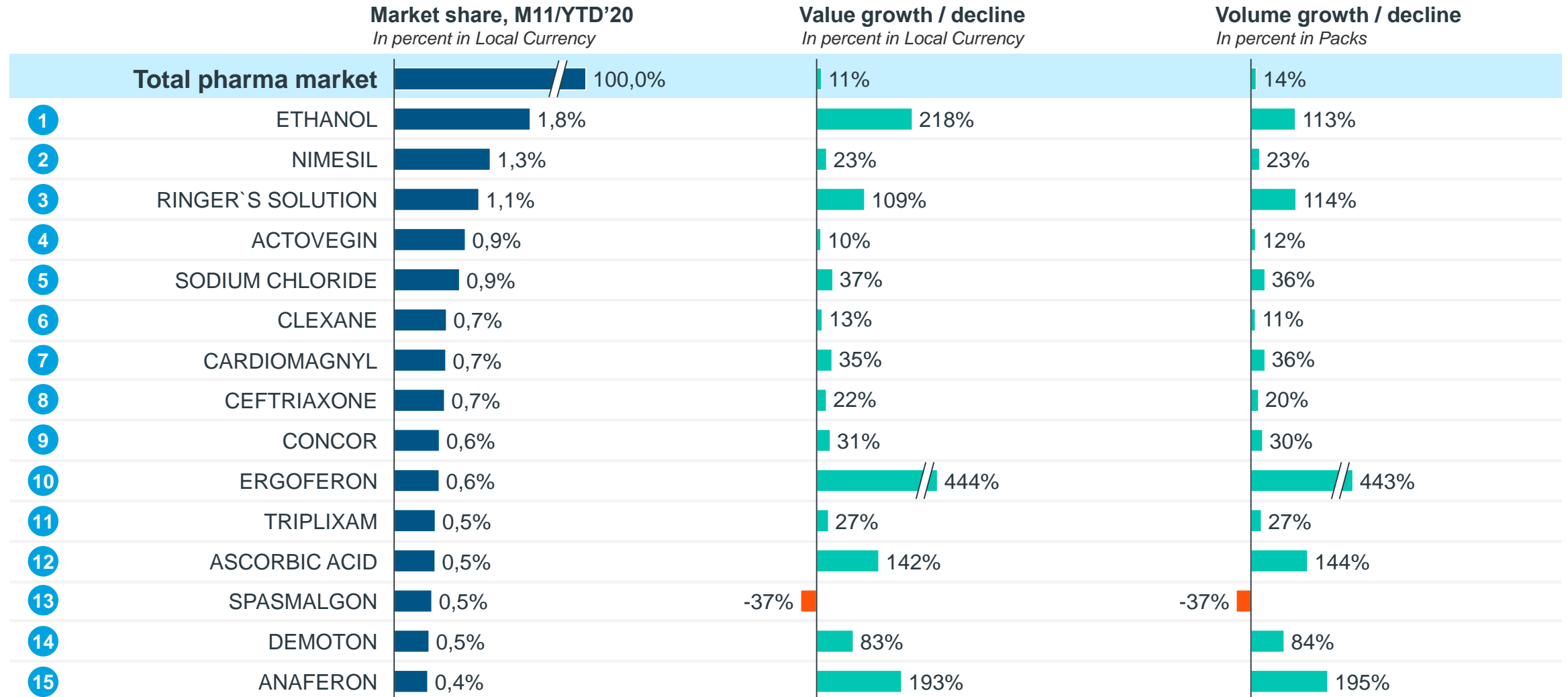
Indicator	AZN	USD	EUR	PACKS
Value M11/YTD'20, Bln.	0,7	0,4	0,4	0,23
Growth M11/YTD'20, %	▲ 11%	▲ 11%	▲ 9,6%	▲ 14%

# TOP-15 corporations on Azerbaijan market, January-November 2020





# TOP-15 brands on Azerbaijan market, January-November 2020



# CONTACT US

## **Anton Kalyapin**

*Associate Director, Offering and Supplier Relations*

 Anton.Kalyapin@IQVIA.com

 +7 499 272 05 00

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## **Svetlana Nikulina**

*Sales Director Russia and CIS*

 Svetlana.Nikulina@IQVIA.com

 +7 499 272 05 00

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## **Nadezhda Kalinich**

*Client Service Representative*

 Nadezhda.Kalinich@IQVIA.com

 +7 499 272 05 00