



FACTS from IQVIA — Eurasia

Delivering solutions to
drive healthcare forward

April 2026

Disclaimer

The analyses, their interpretation, and related information contained herein are made and provided subject to the assumptions, methodologies, caveats, and variables described in this report and are based on third party sources and data reasonably believed to be reliable.

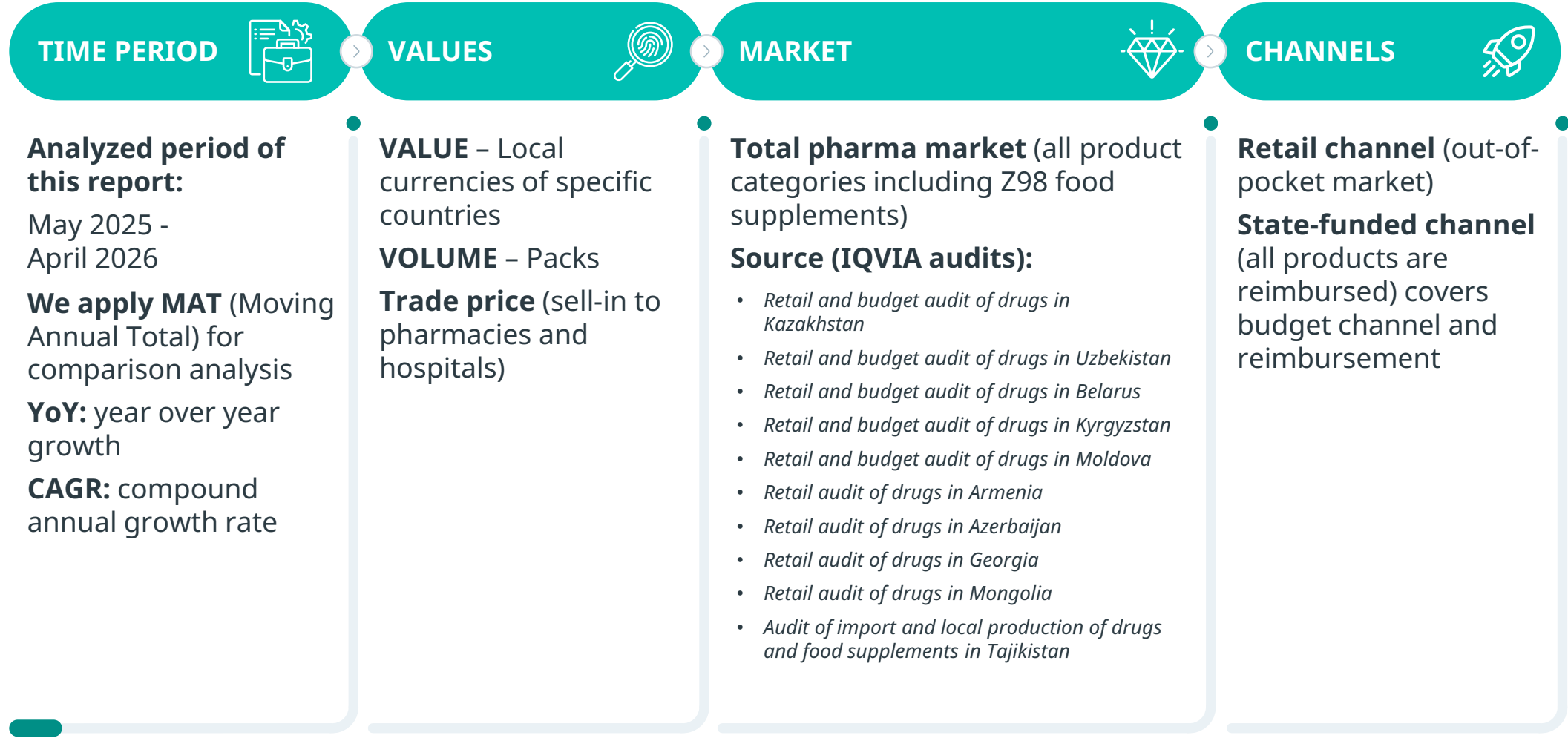
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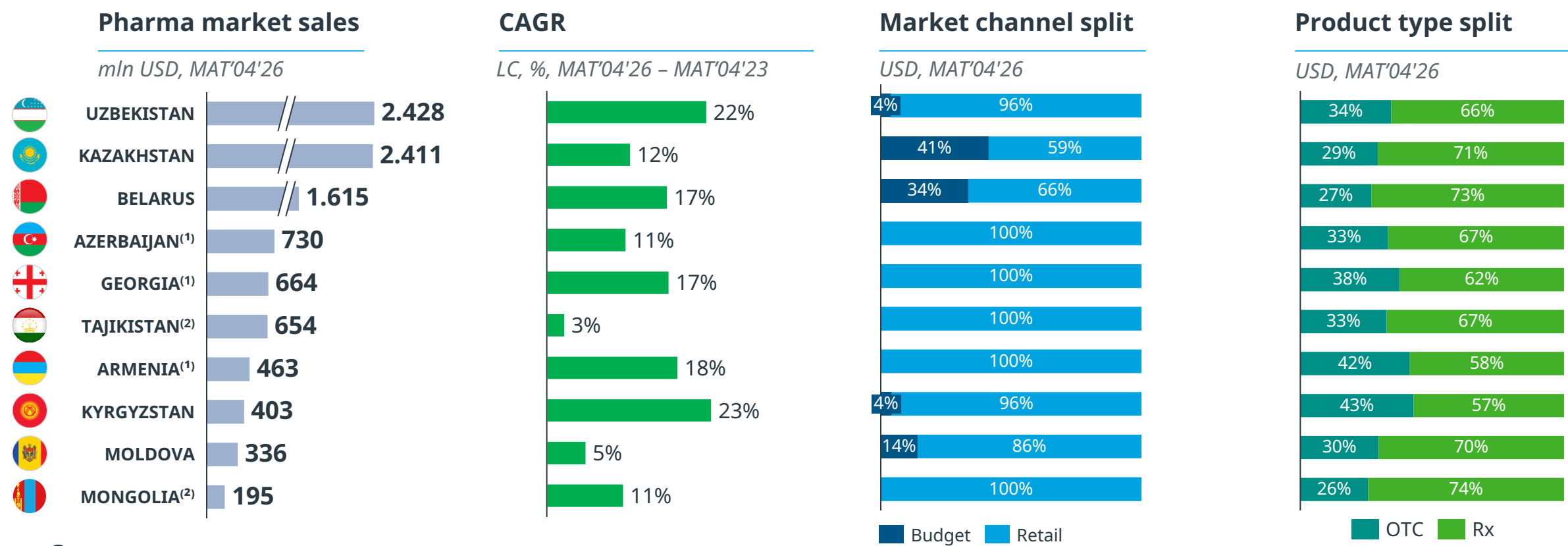
The following definitions are used in the existing IQVIA report

Disclaimer



Eurasia pharma markets demonstrate the domination of retail segment; Rx products account for ~60-70% of sales

Eurasia countries pharmaceutical markets



Comments

- Kazakhstan and Uzbekistan are the largest Eurasia markets; Uzbekistan and Kyrgyzstan are the fastest growing Eurasia markets
- Retail segment is prevailing for Eurasia markets with Uzbekistan, Kyrgyzstan and Moldova showing the largest shares of retail channel
- Prescribed products account for approximately 60-70% of value sales in each of the Eurasia countries

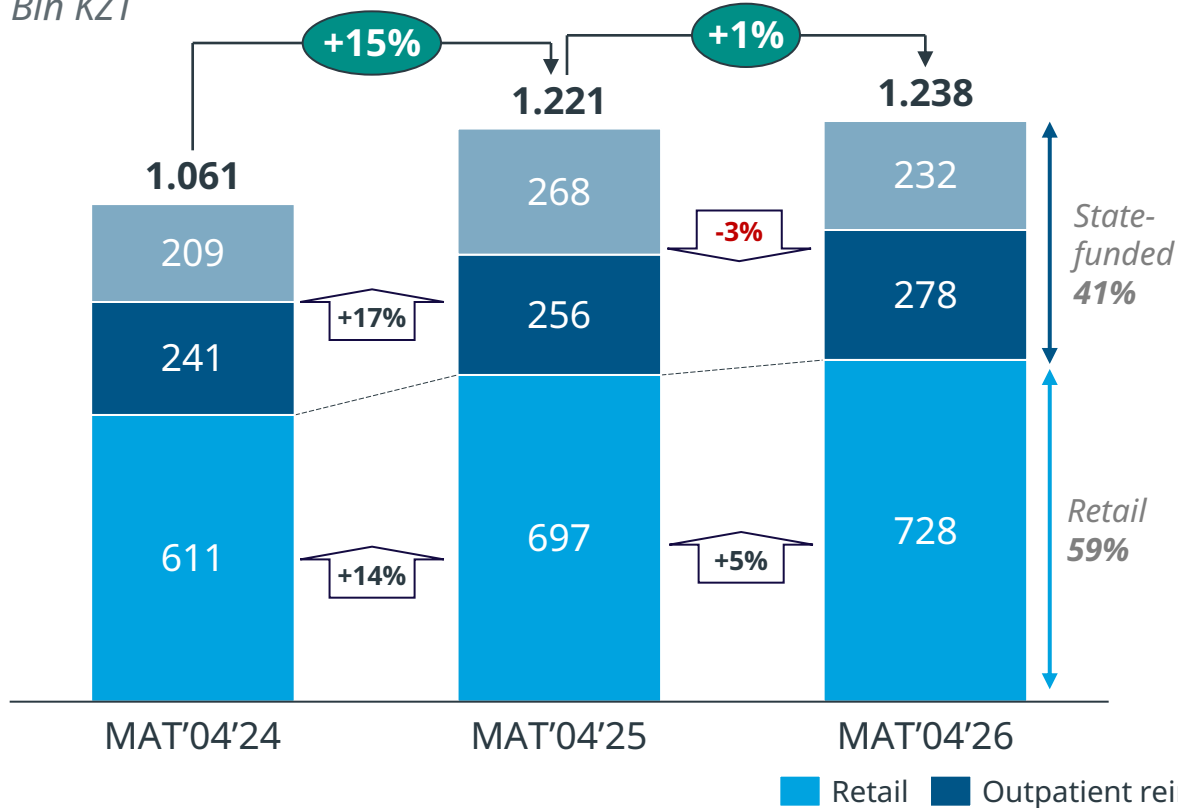
⁽¹⁾ For Armenia, Azerbaijan and Georgia only retail market data is presented; ⁽²⁾ For Mongolia and Tajikistan data is available on quarterly update basis. Currently – Q1'26 data;
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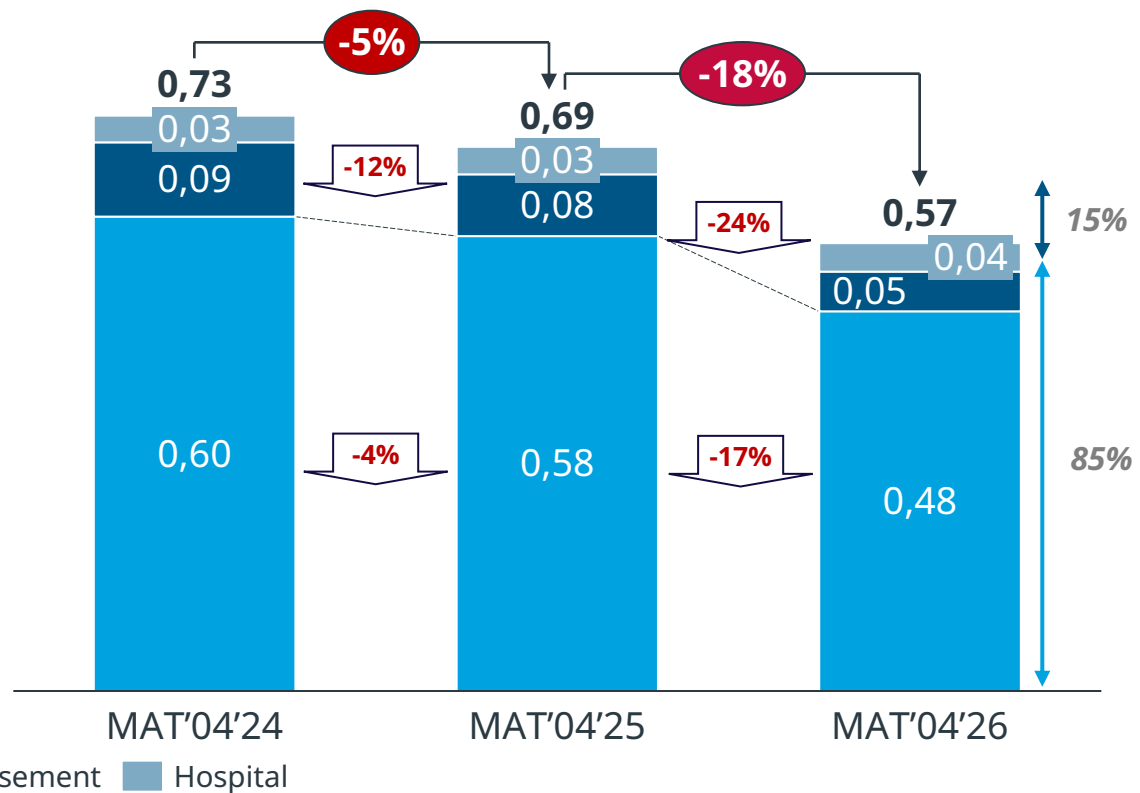
Kazakhstan pharma market demonstrates positive value growth driven exclusively by the retail segment

Kazakhstan total pharma market by channels

Total Sales by Value
Bln KZT



Total Sales by Volume
Bln Packs

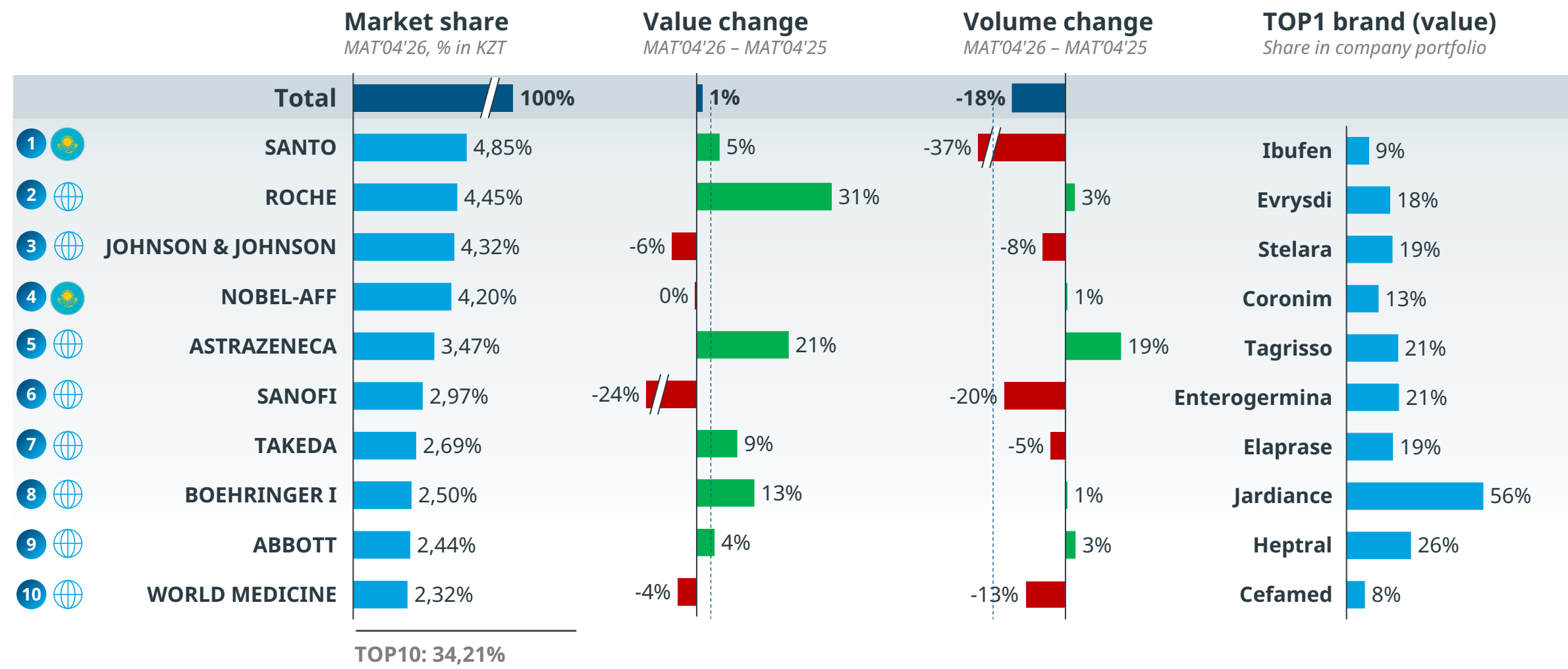


Indicator	KZT	USD	EURO	Packs	SU
Value MAT'04'26, Bln	1.237,6	2,4	2,1	0,6	20,8
Growth 26/25, %	1%	-3%	-10%	-18%	-6%



Most of the TOP10 companies are showing positive value dynamics vs YA; There are 2 local companies in the TOP5

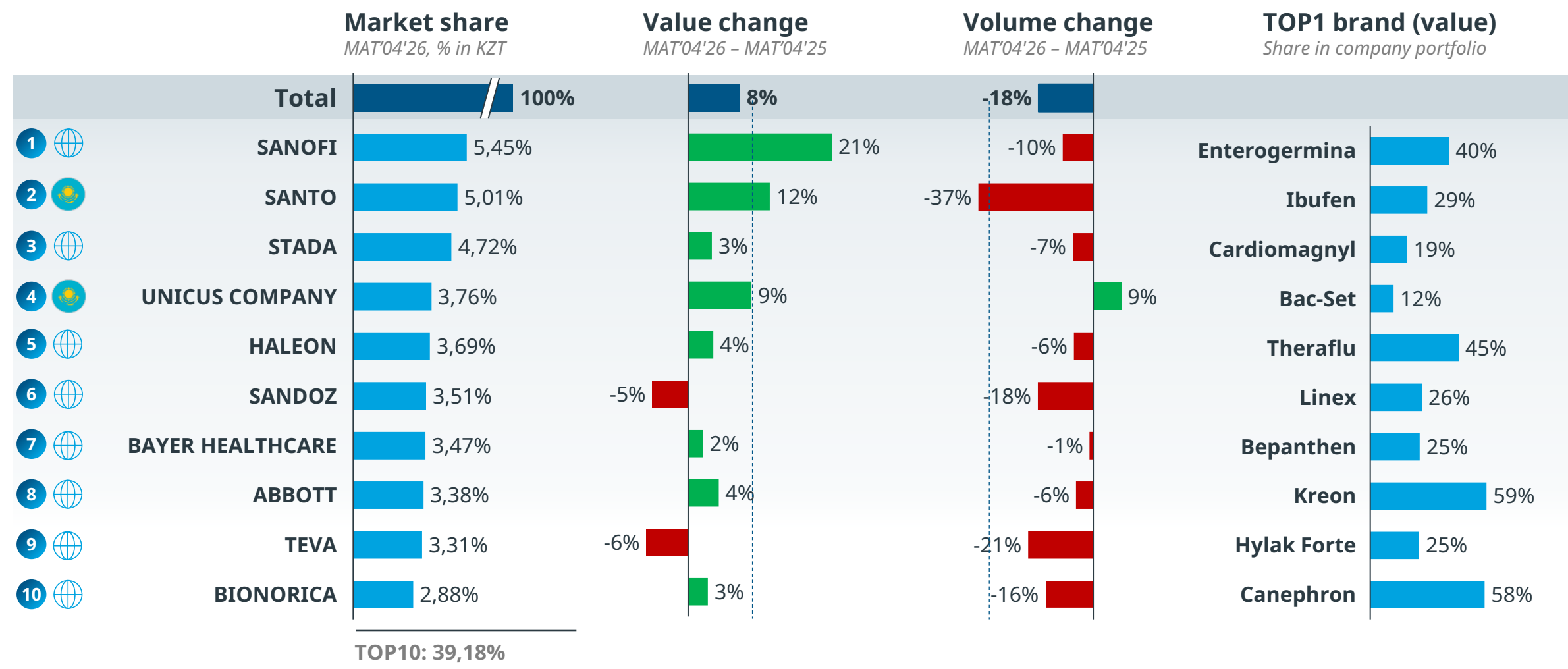
TOP10 overall ranking of companies by sales





In the OTC market, the majority of TOP10 companies are showing value growth compared to the previous year

TOP10 overall ranking of companies by sales (OTC only)

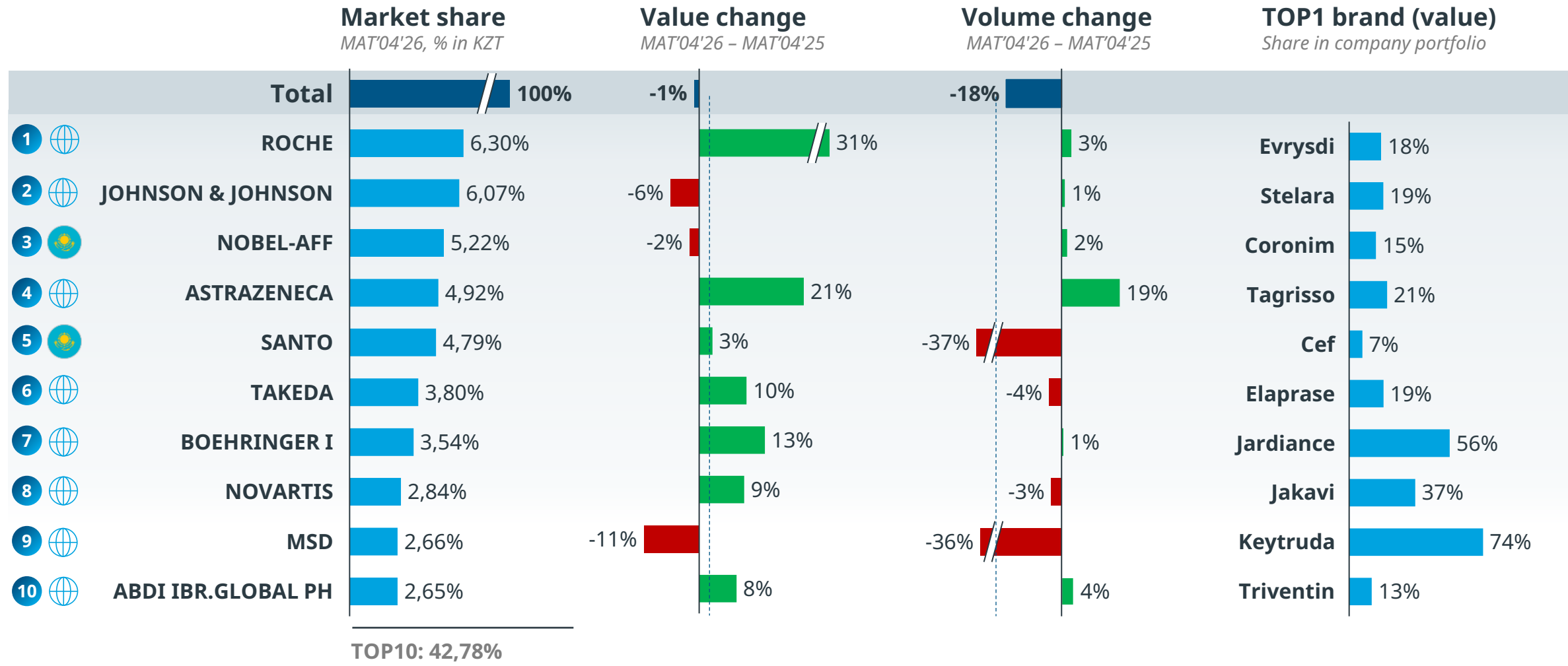


Total pharmaceutical market overview

In the Total Rx market, most of the TOP10 companies are showing year-over-year value growth



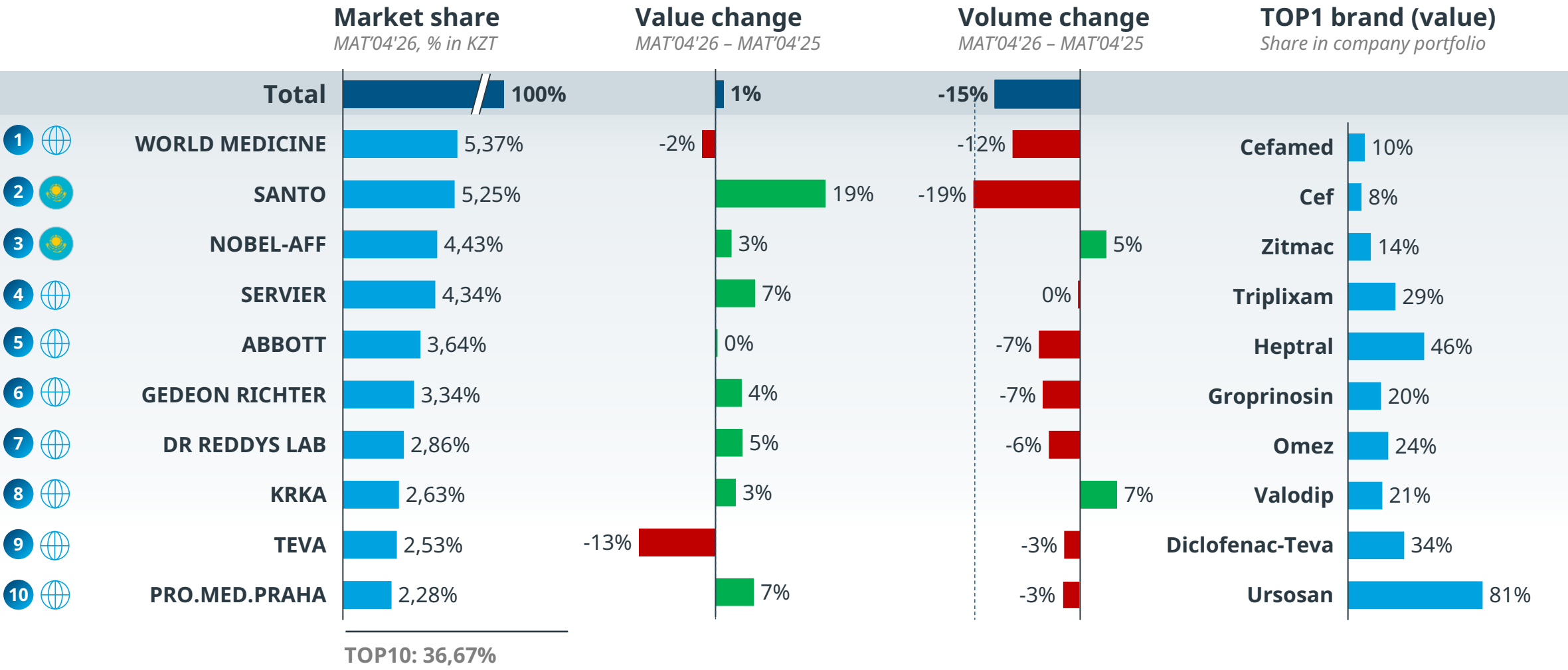
TOP10 overall ranking of companies by sales (Rx only)





In the Retail Rx market, nearly all TOP10 companies are growing in value vs YA

TOP10 overall ranking of companies by sales (Rx only, retail)

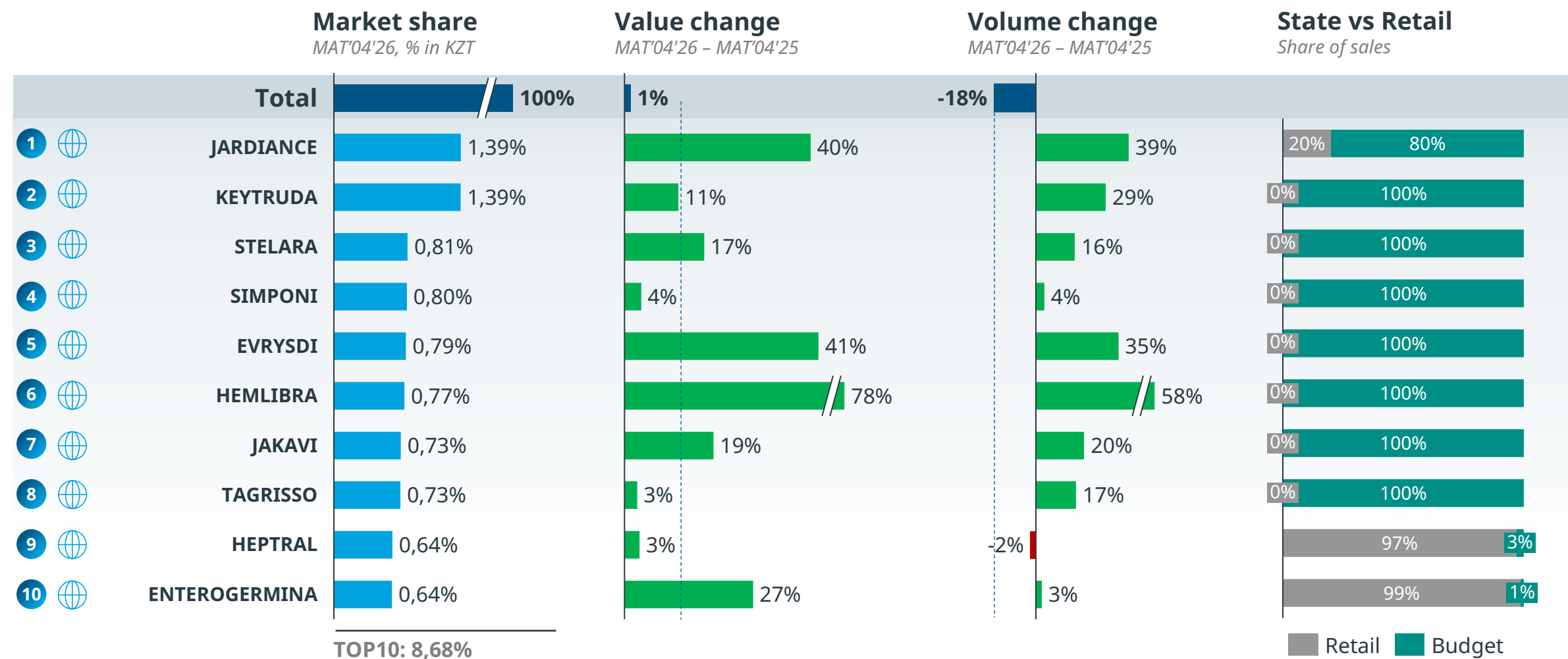


Retail market overview



The majority of TOP10 brands are distributed primarily or exclusively through the state-funded segment

TOP10 overall ranking of brands by sales

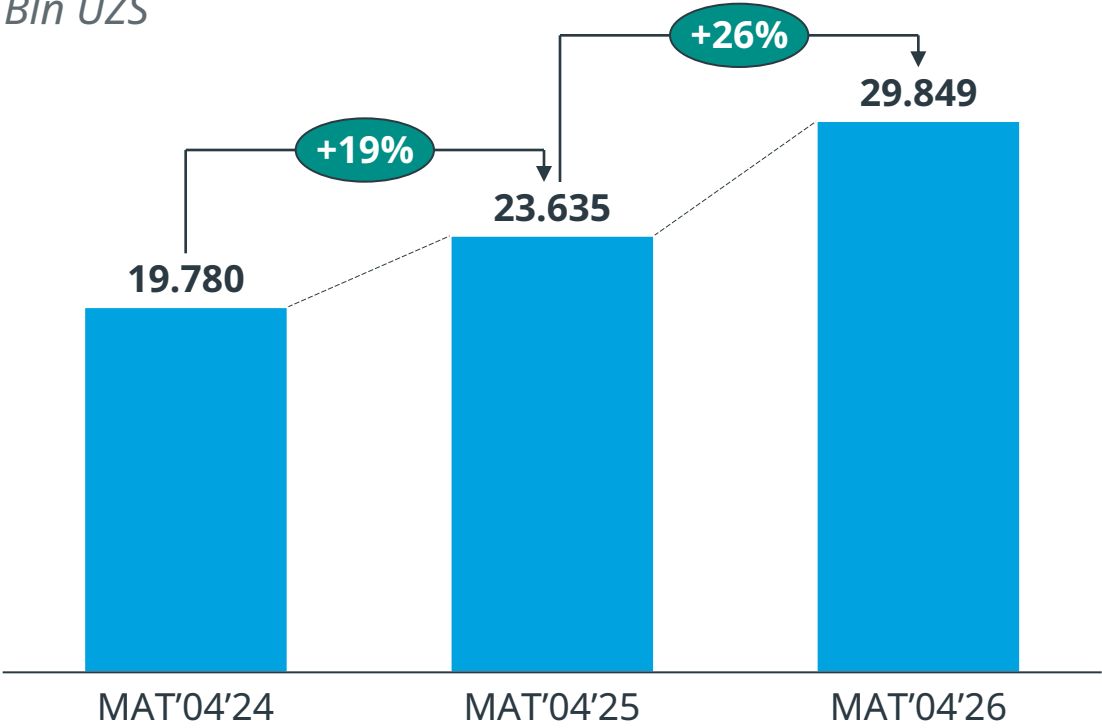




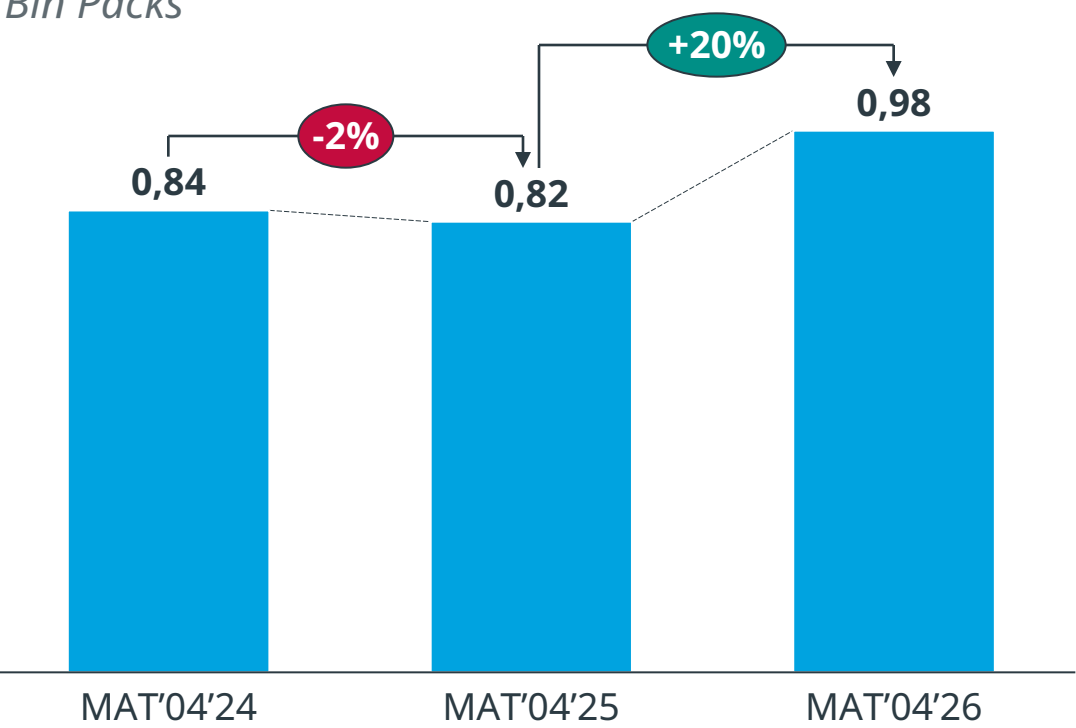
Uzbekistan pharmaceutical market is growing significantly both in value and volume compared to the previous year

Uzbekistan total pharma market

Total Sales by Value
Bln UZS



Total Sales by Volume
Bln Packs



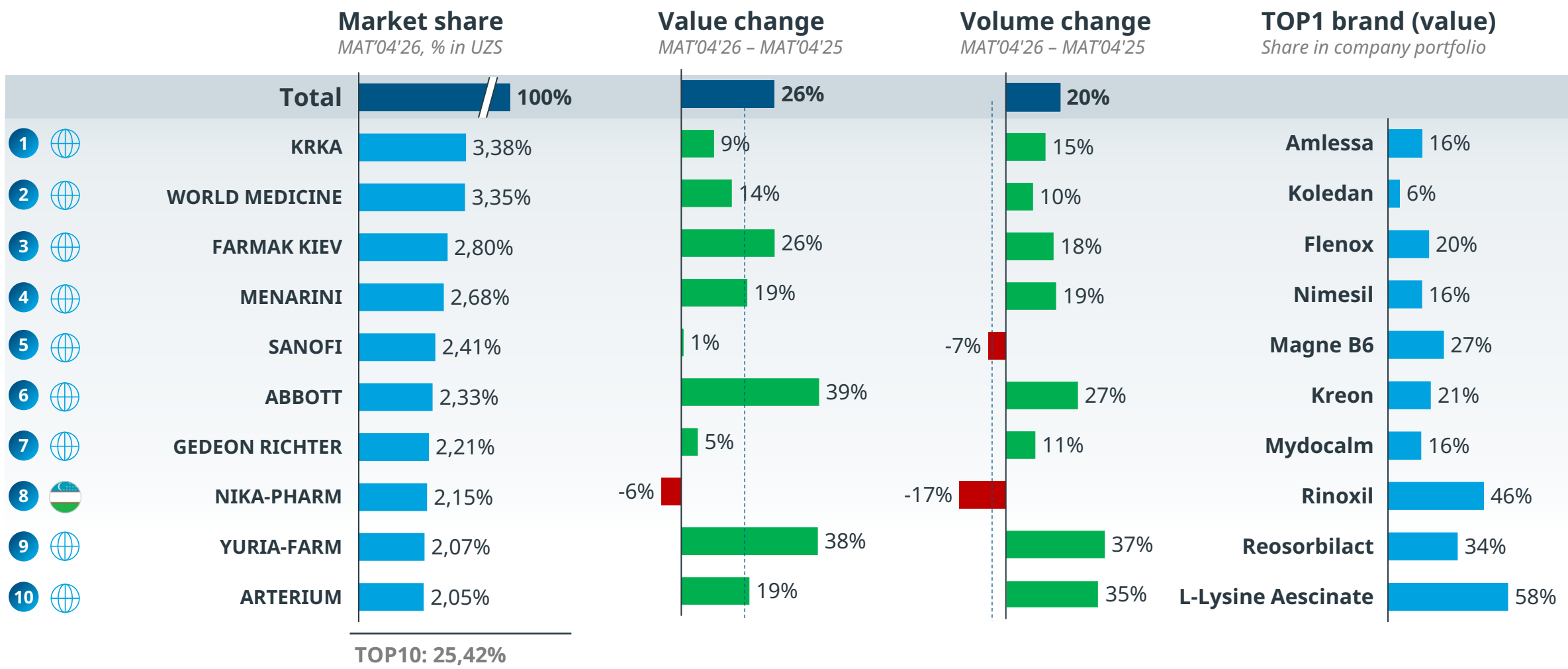
■ Retail + Budget segments

Indicator	UZS	USD	EURO	Packs	SU
Value MAT'04'26, Bln	29.848,7	2,4	2,1	1,0	23,4
Growth 26/25, %	26%	32%	22%	20%	17%



Almost all TOP10 companies are showing positive value dynamics comparing to the previous year

TOP10 overall ranking of companies by sales

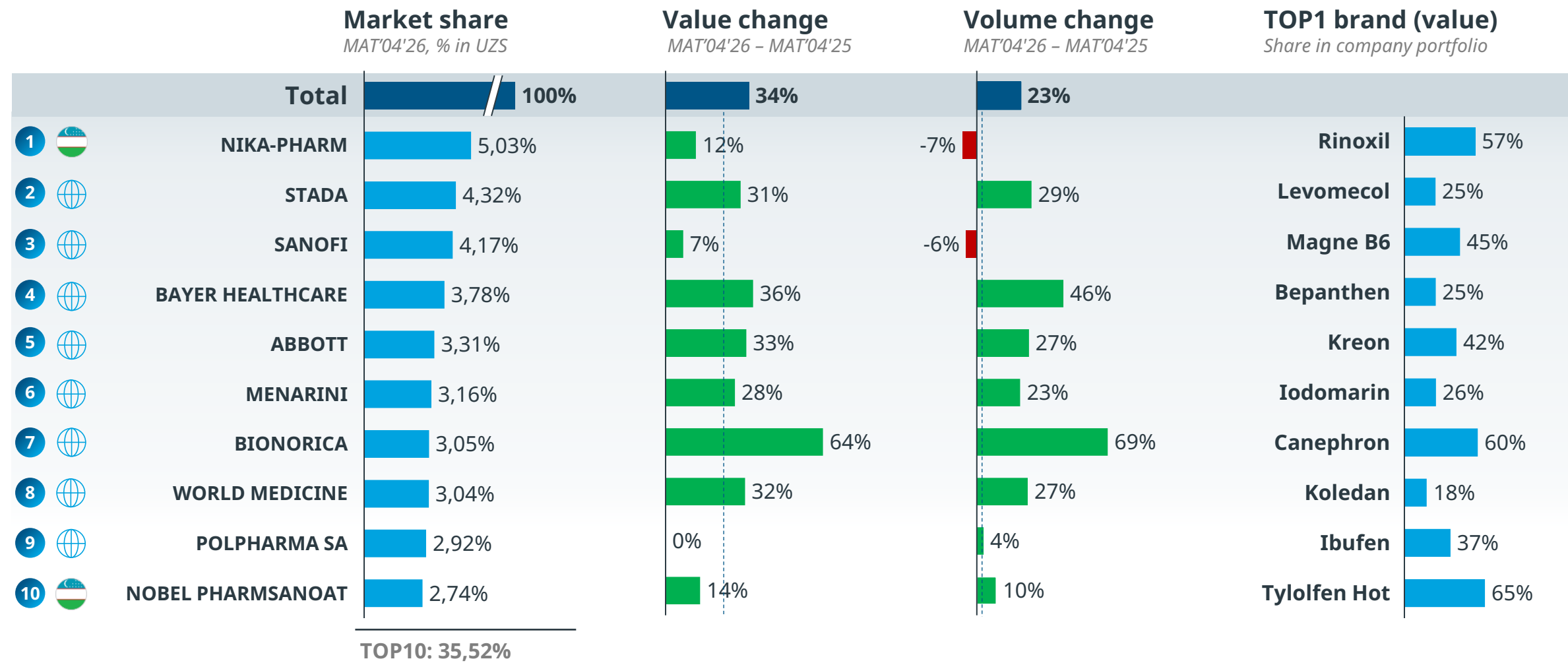


Total pharmaceutical market overview



On the OTC market, the most significant growth in value is demonstrated by BIONORICA company

TOP10 overall ranking of companies by sales (OTC only)

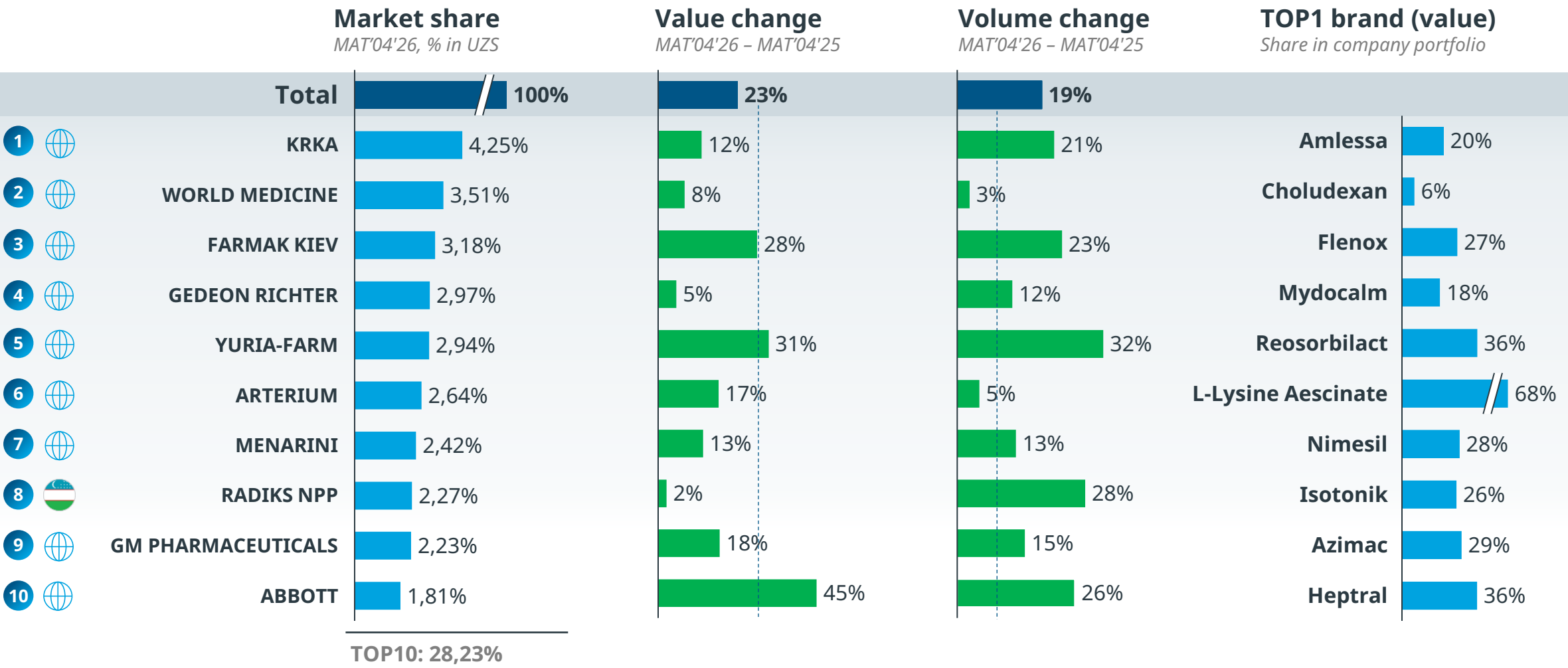


Total pharmaceutical market overview



All TOP10 Rx market companies are growing both in value and volume terms compared to the previous year

TOP10 overall ranking of companies by sales (Rx only)

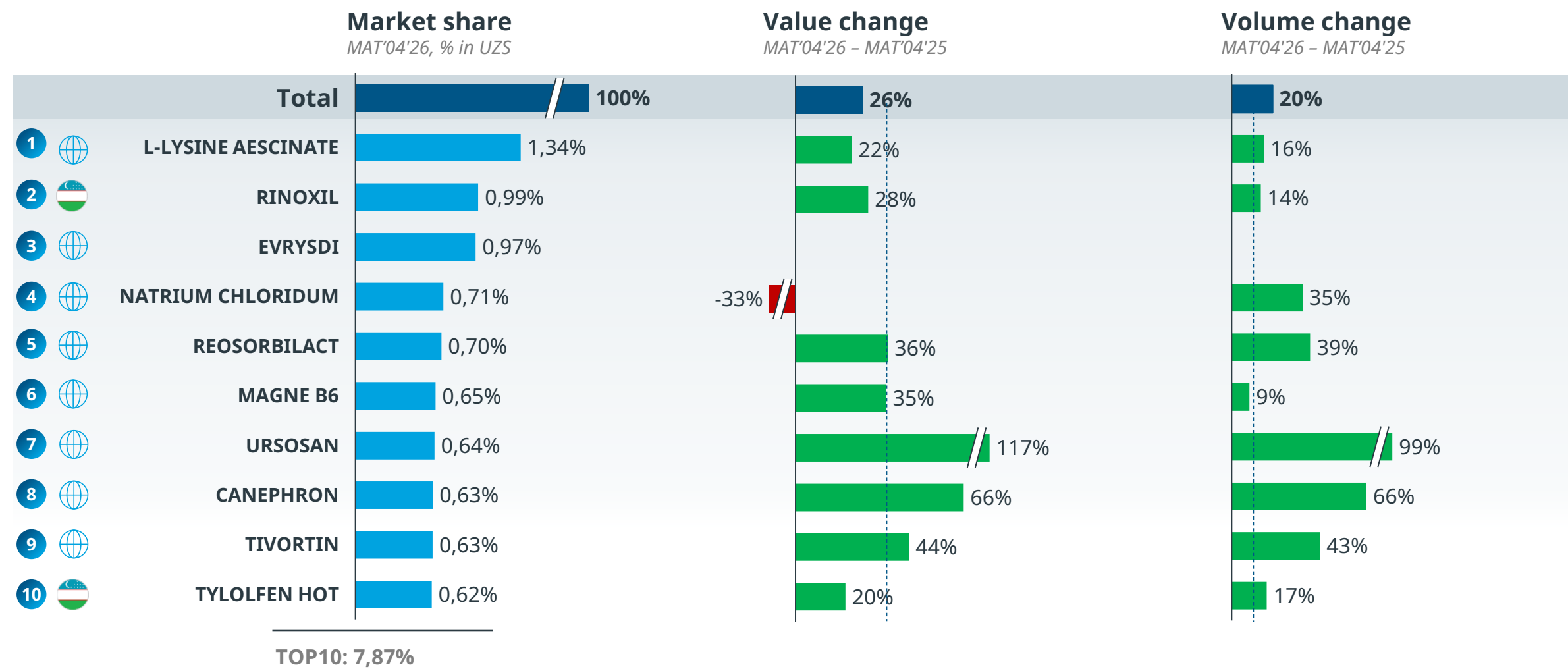


Total pharmaceutical market overview



Ursosan is the top-performing brand in terms of value and volume growth among the TOP10

TOP10 overall ranking of brands by sales



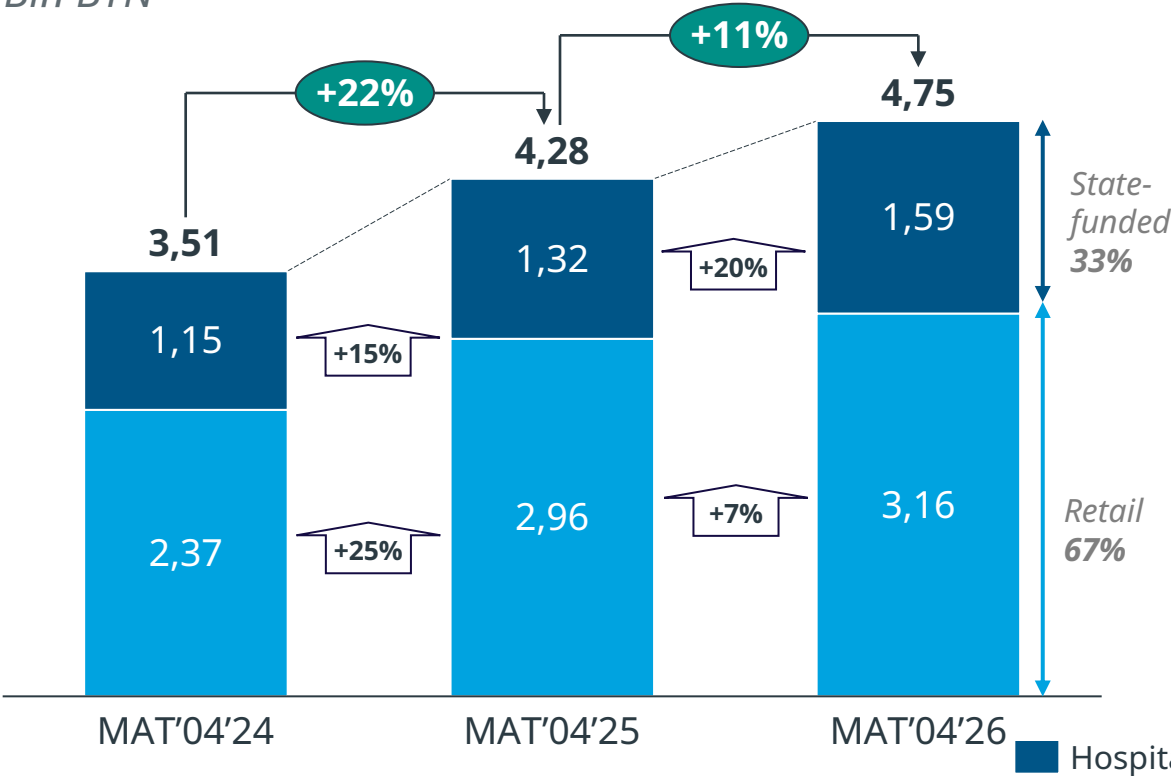
Total pharmaceutical market overview



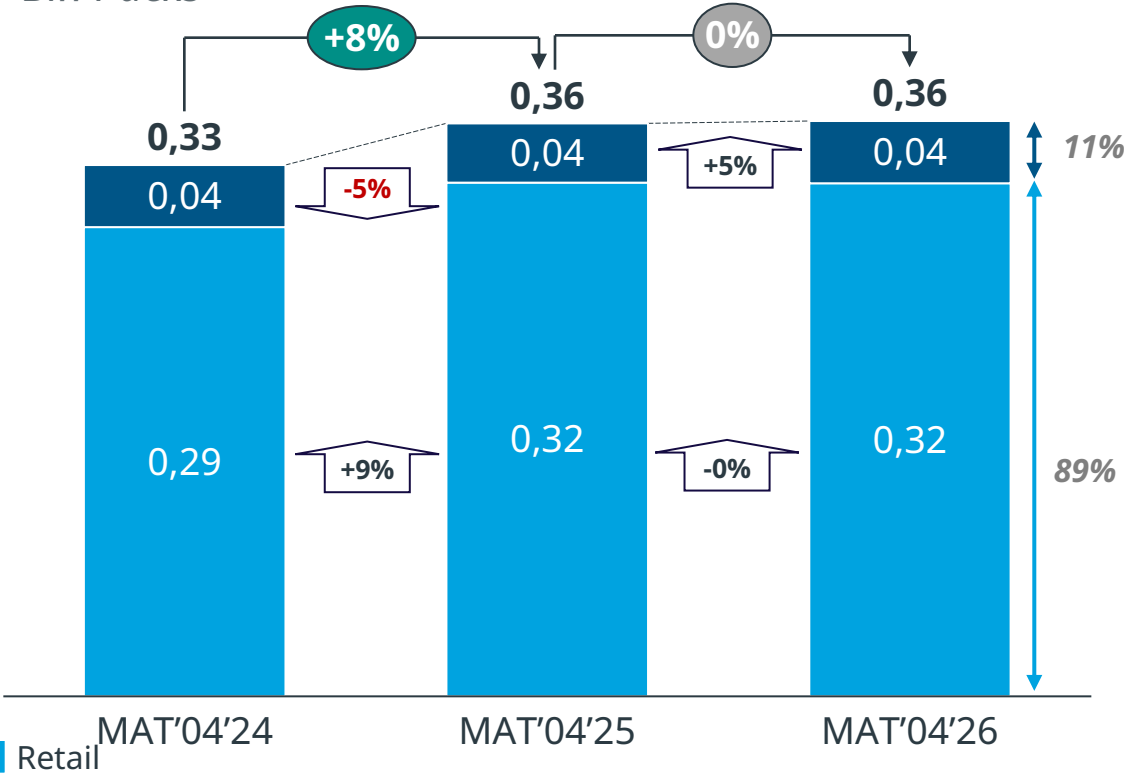
Belarus pharma market is showing value growth driven by the expansion of both segments

Belarus total pharma market by channels

Total Sales by Value
Bln BYN



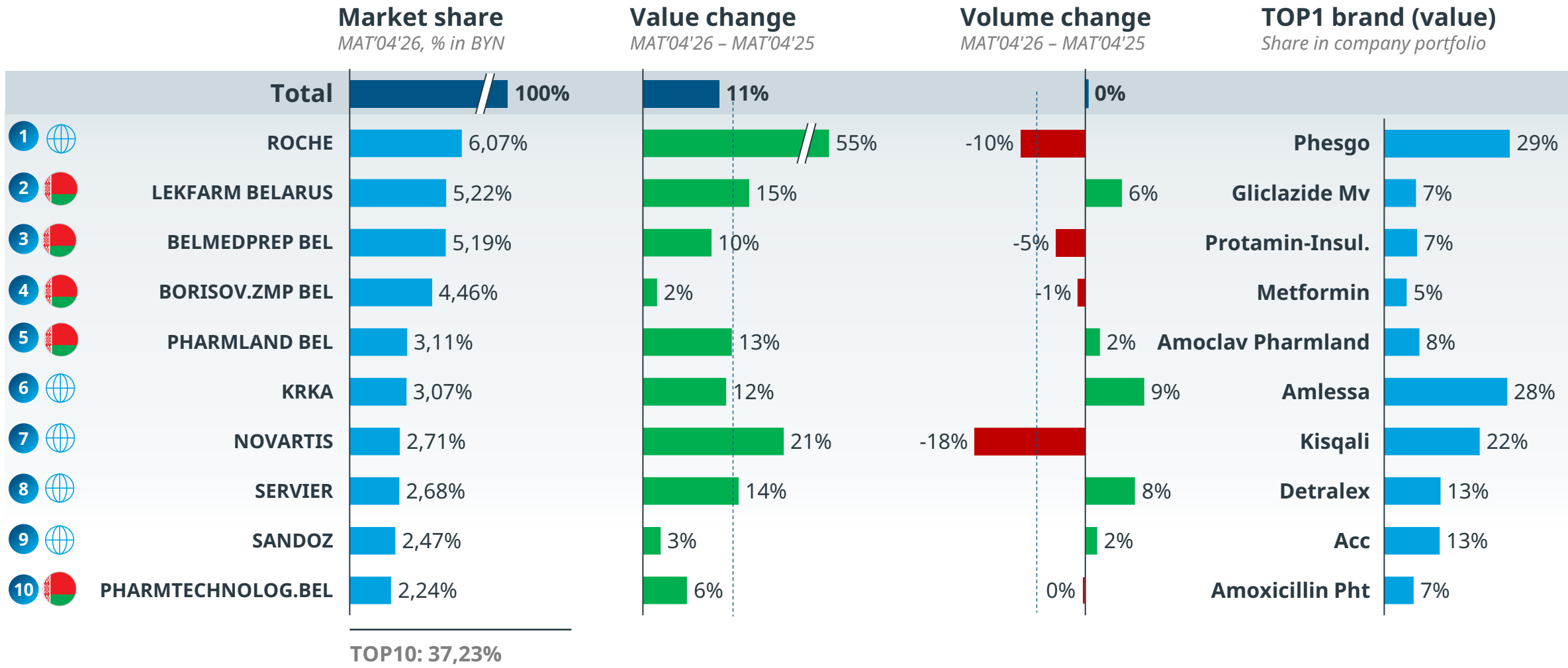
Total Sales by Volume
Bln Packs



Indicator	BYN	USD	EURO	Packs	SU
Value MAT'04'26, Bln	4,8	1,6	1,4	0,4	17,1
Growth 26/25, %	11%	23%	14%	0%	0%

All TOP10 companies are growing in value terms compared to the previous year

TOP10 overall ranking of companies by sales

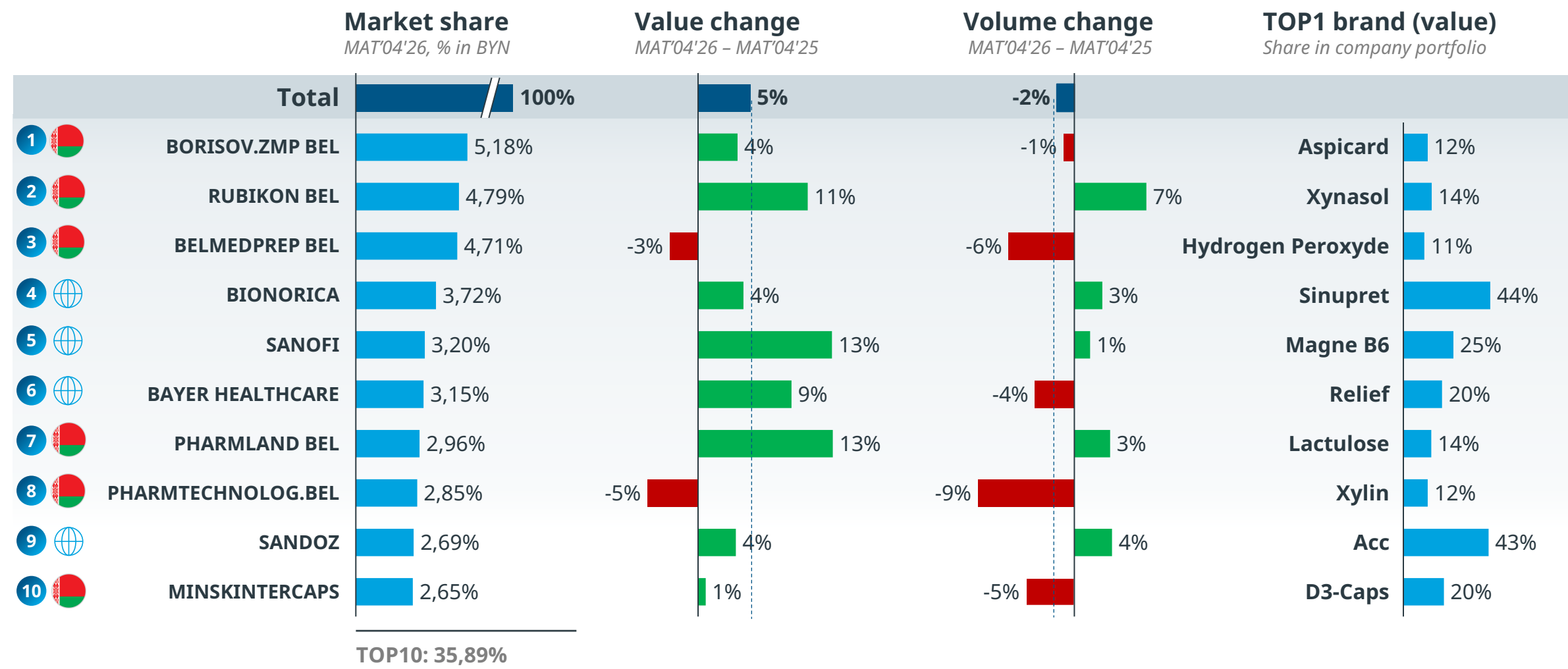


Total pharmaceutical market overview



The list of TOP10 companies in Belarus OTC market is primarily represented by local companies

TOP10 overall ranking of companies by sales (OTC only)

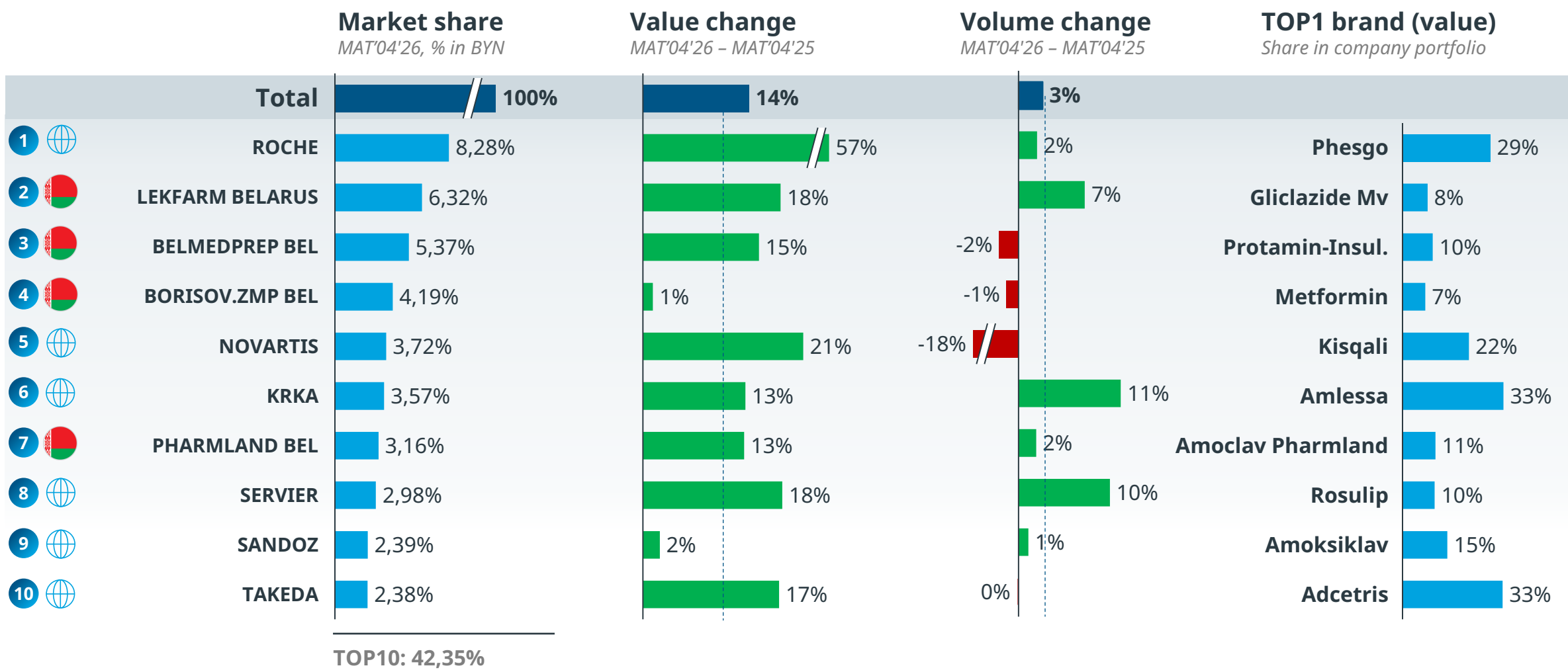


Total pharmaceutical market overview



All TOP10 companies in the Rx market show year-over-year value growth

TOP10 overall ranking of companies by sales (Rx only)

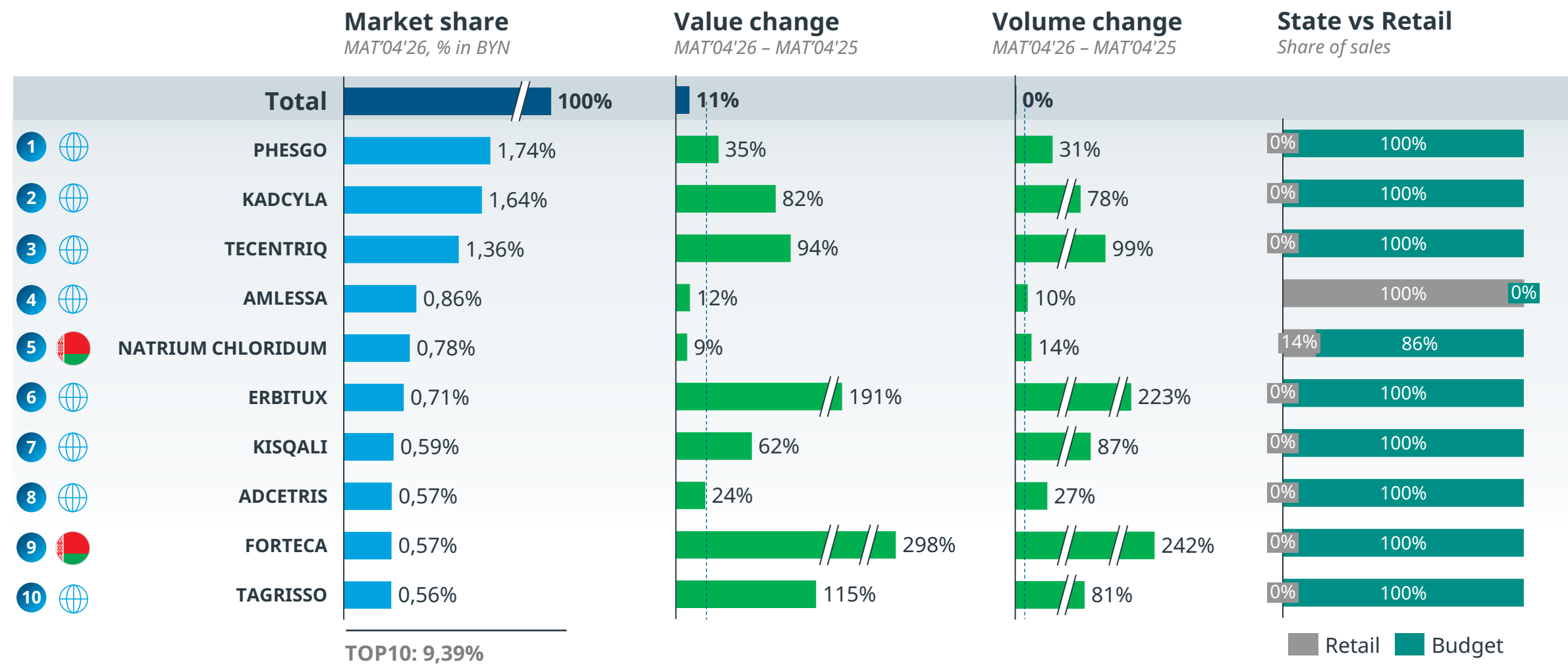


Total pharmaceutical market overview



The majority of the TOP10 brands are sold primarily or exclusively through the state-funded segment

TOP10 overall ranking of brands by sales



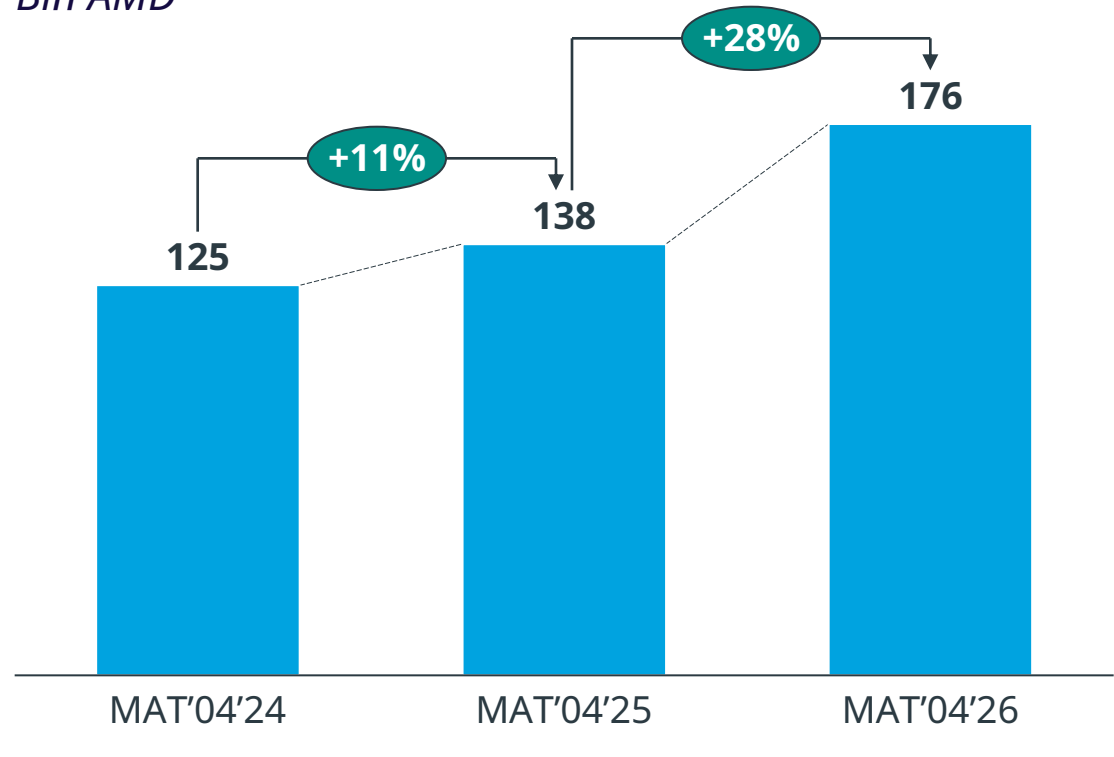
Total pharmaceutical market overview

Armenia pharma market has grown significantly in value & volume terms compared to previous year

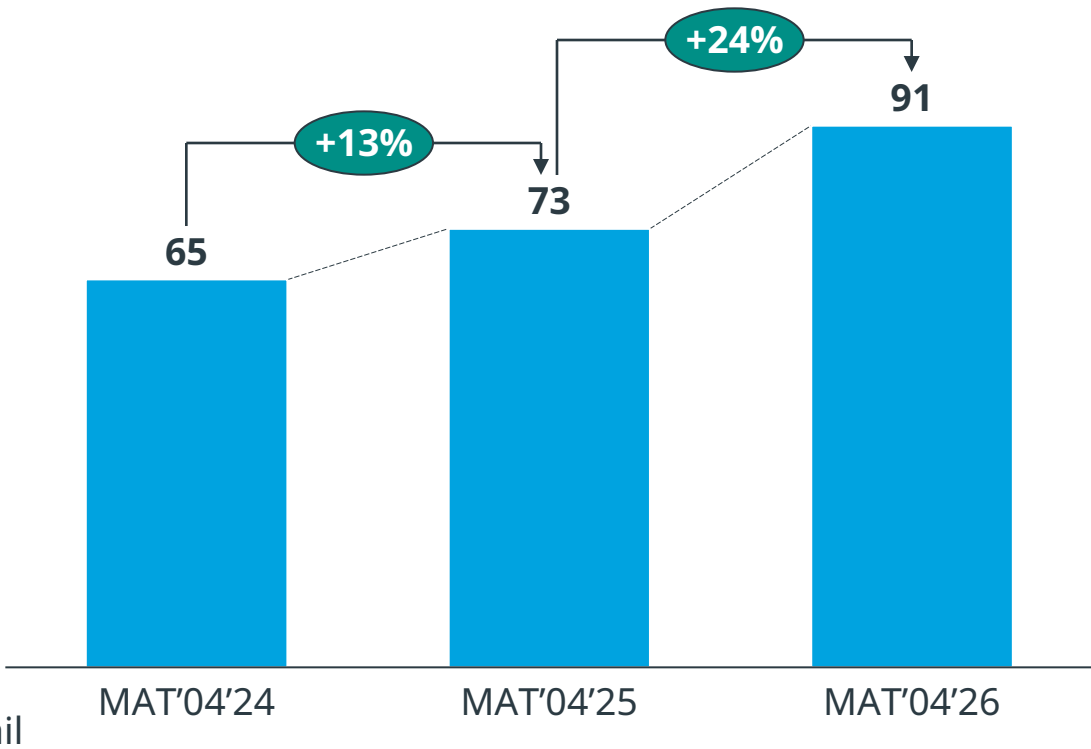


Armenia total pharma market

Total Sales by Value
Bln AMD



Total Sales by Volume
Mln Packs

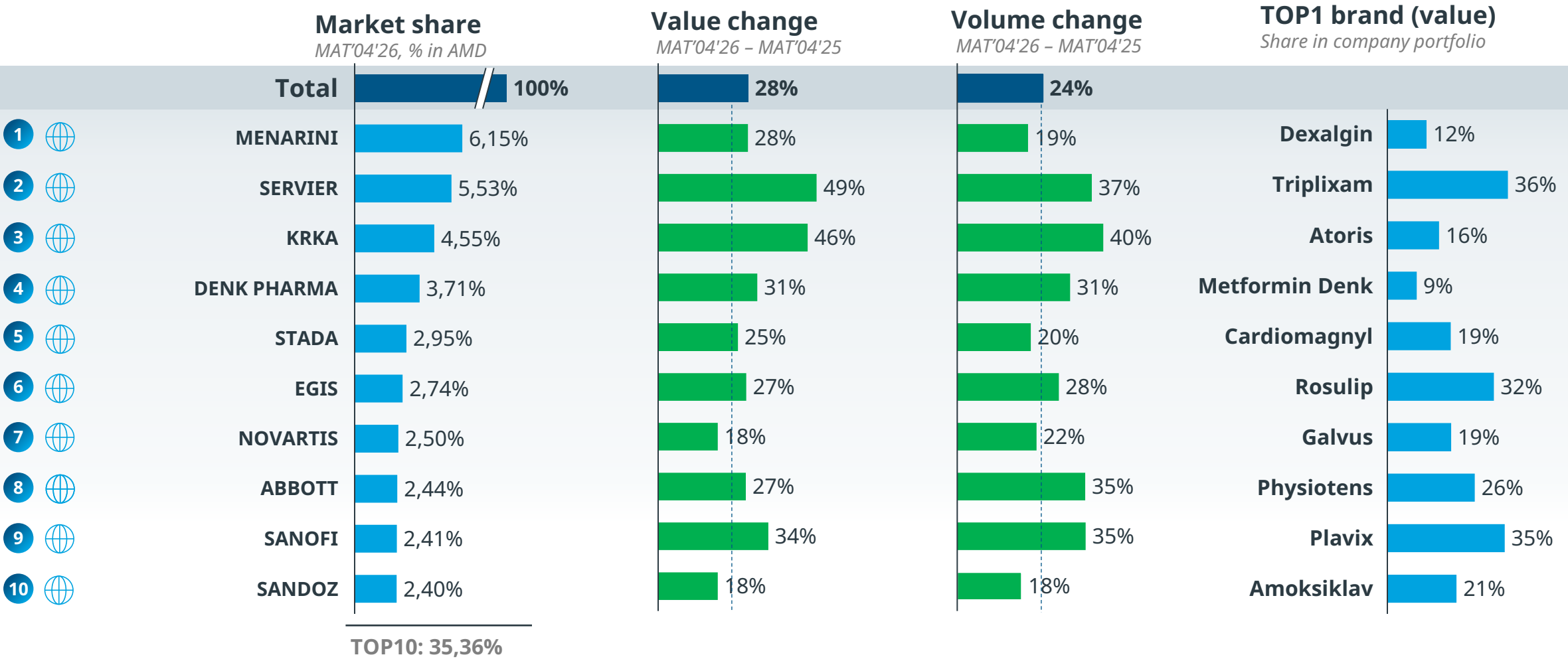


Indicator	AMD	USD	EURO	Packs	SU
Value MAT'04'26, Bln	176,3	0,5	0,4	0,1	4,7
Growth 26/25, %	28%	31%	21%	24%	24%



All TOP10 companies are showing growth in both value and volume; SERVIER and KRKA are the top performers in value growth among the TOP10 companies

TOP10 overall ranking of companies by sales

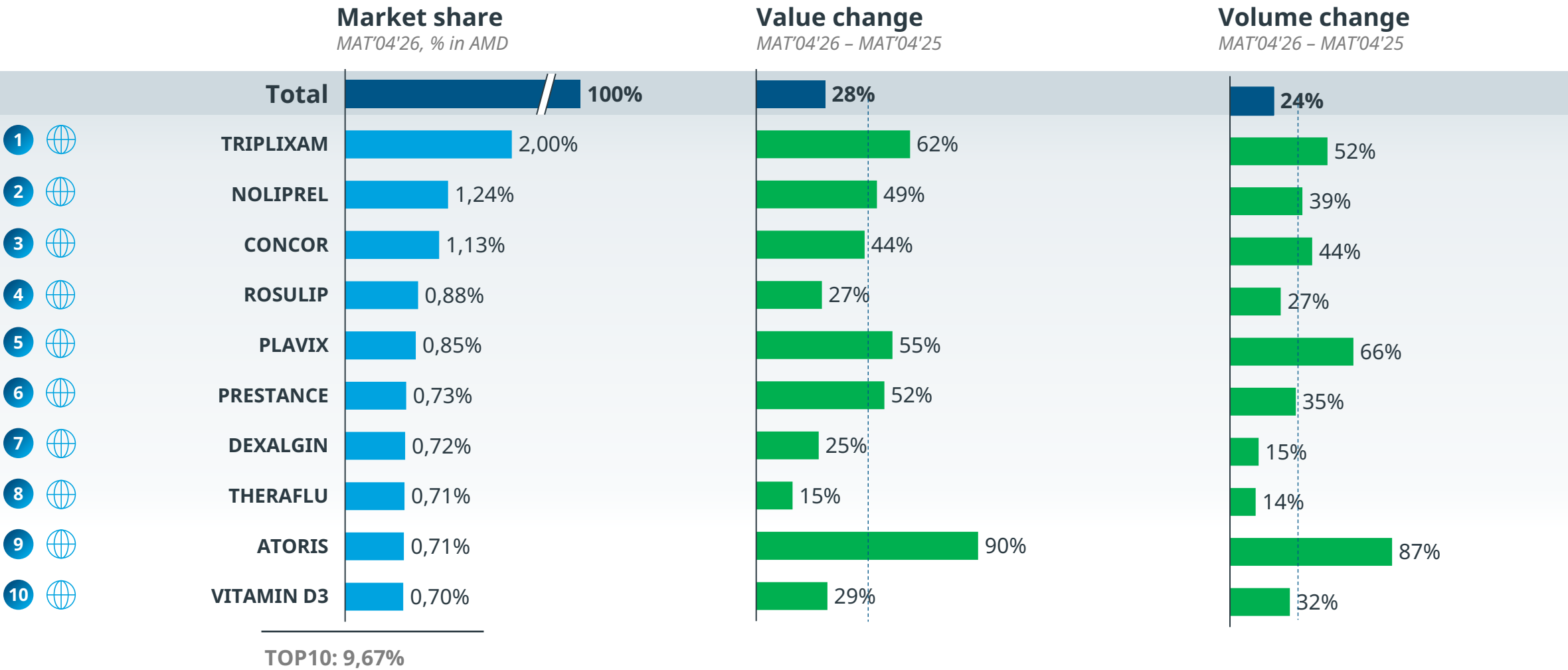


Total pharmaceutical market overview

All TOP10 brands are international brands with positive dynamics vs YA in value and volume terms



TOP10 overall ranking of brands by sales



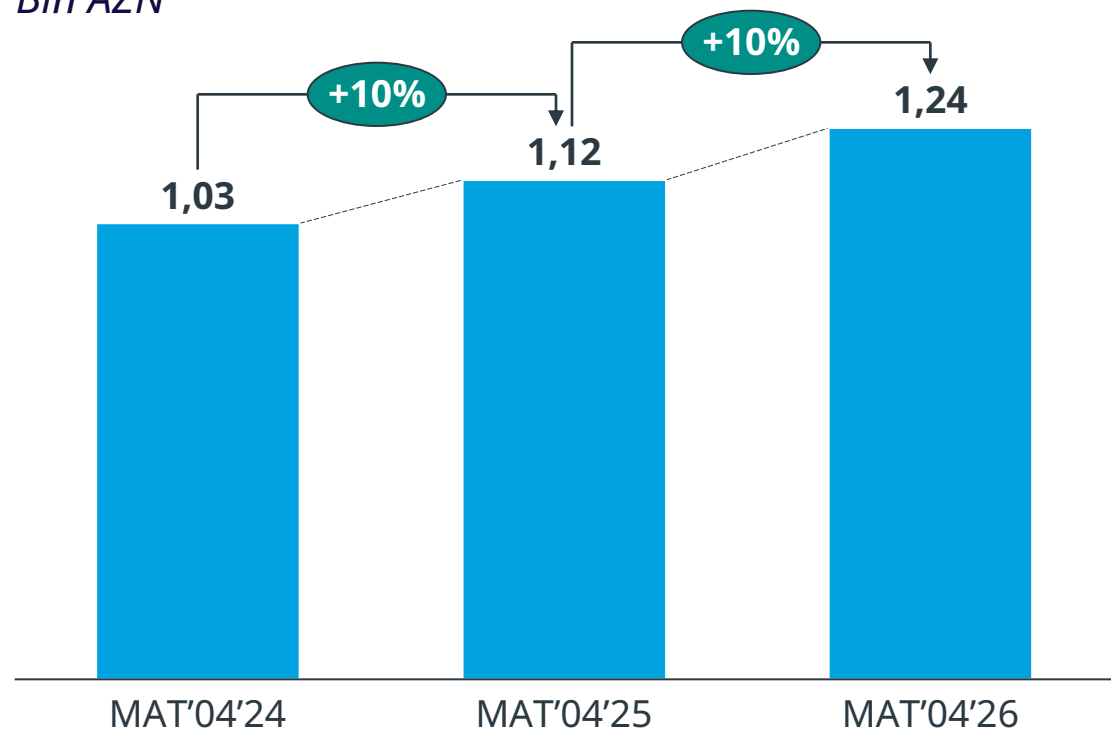
Total pharmaceutical market overview

Azerbaijan pharma market is growing in both value and volume compared to the previous year

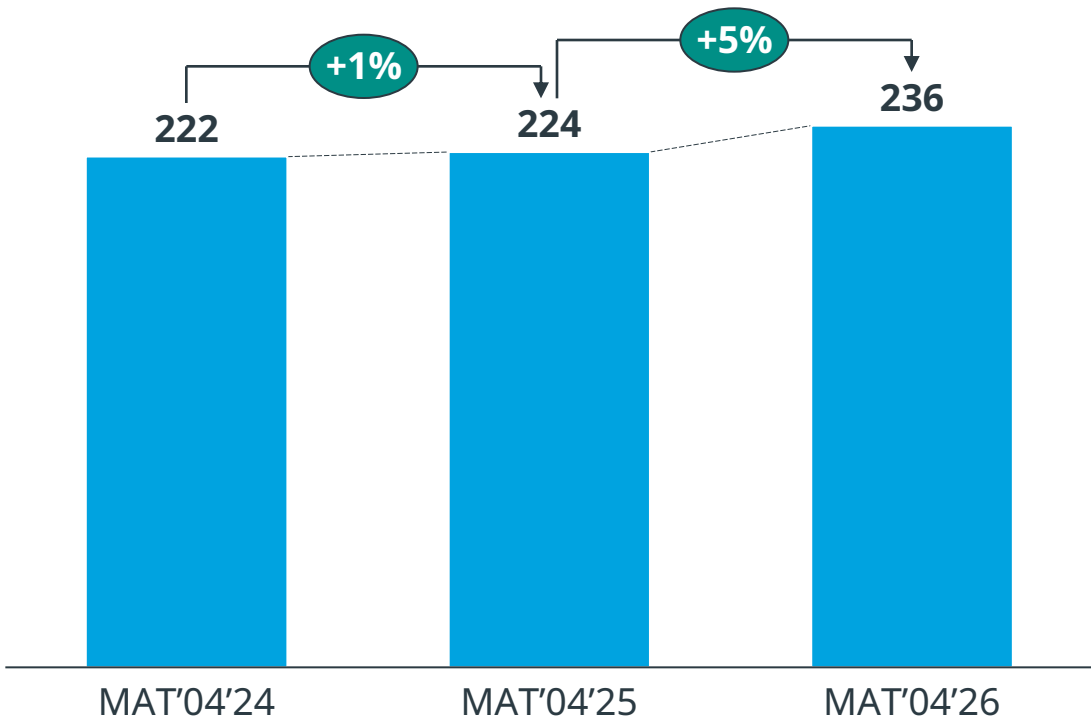


Azerbaijan total pharma market

Total Sales by Value
Bln AZN



Total Sales by Volume
Mln Packs



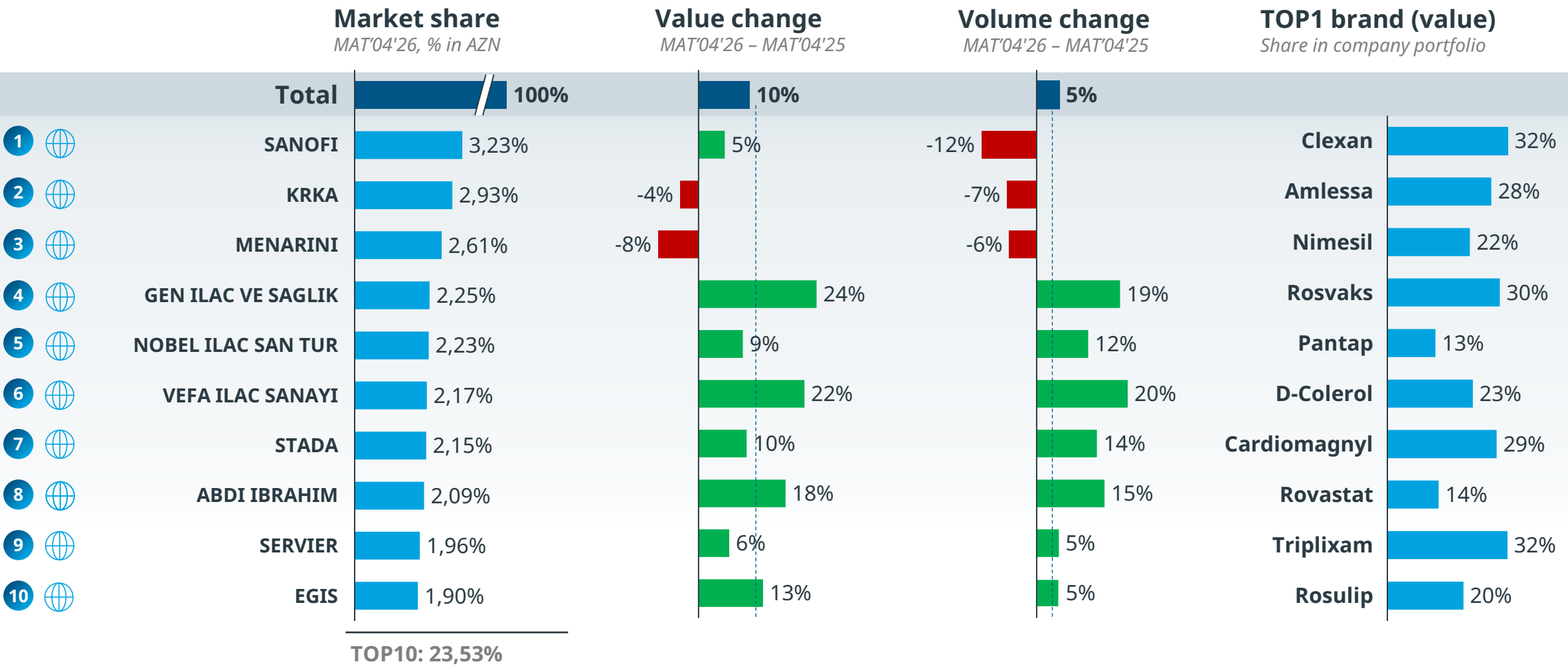
Retail

Indicator	AZN	USD	EURO	Packs	SU
Value MAT'04'26, Bln	1,2	0,7	0,6	0,2	6,4
Growth 26/25, %	10%	10%	2%	5%	7%



Most of the TOP10 companies are multinational, showing value growth compared to the previous year

TOP10 overall ranking of companies by sales

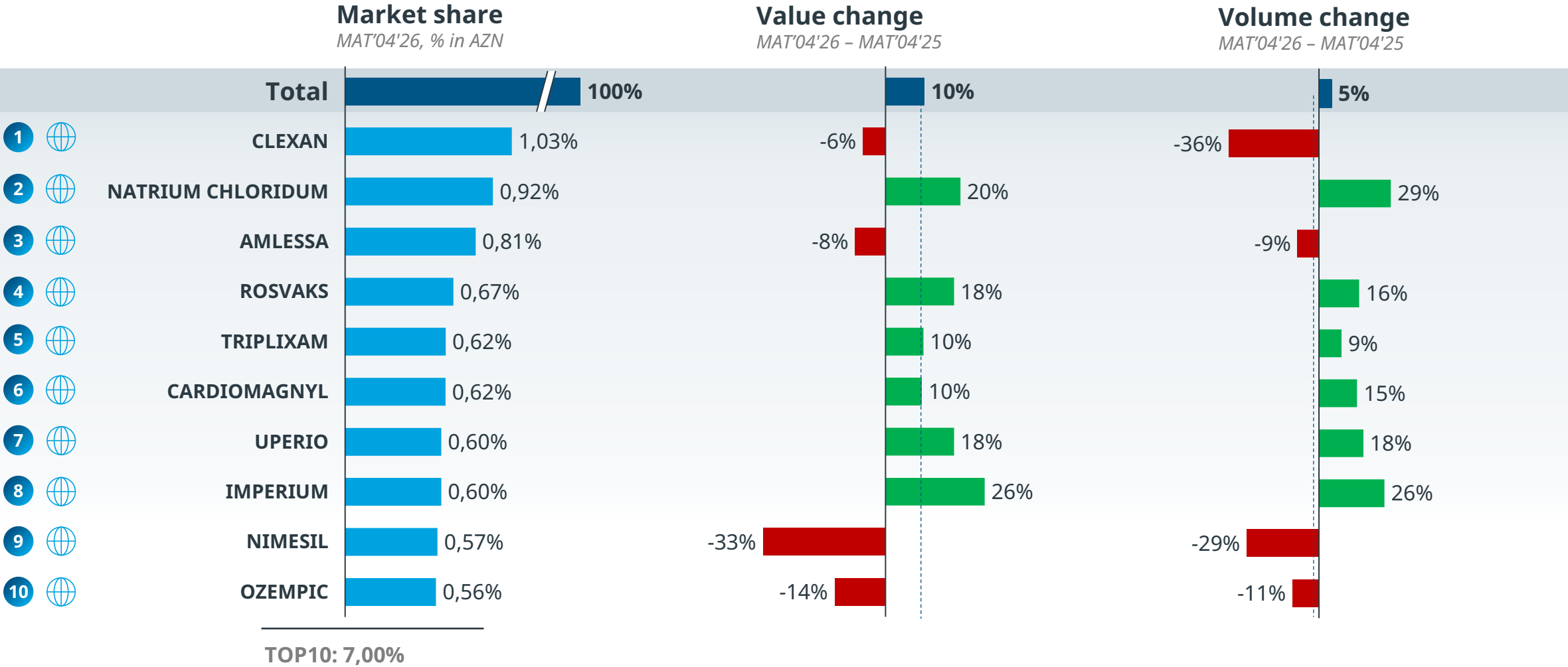


Total pharmaceutical market overview



All the TOP10 brands are international brands, the majority of them have grown in value and volume terms in the latest period

TOP10 overall ranking of brands by sales



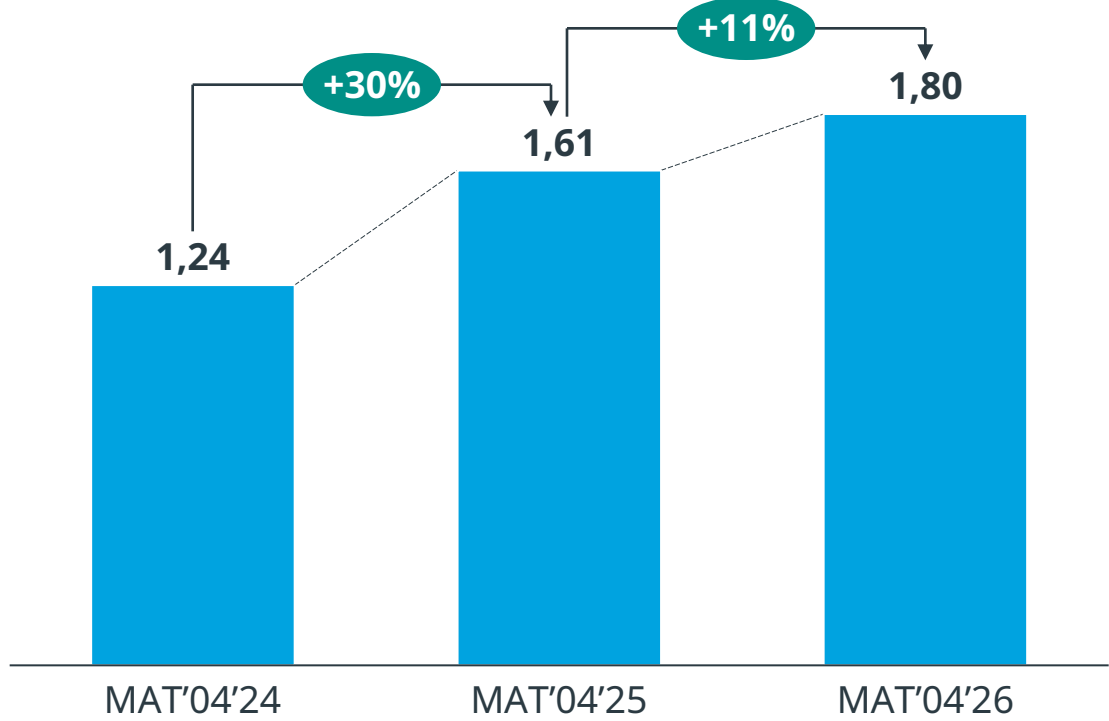
Total pharmaceutical market overview

Georgia pharma market sales level has grown in value comparing to the previous year

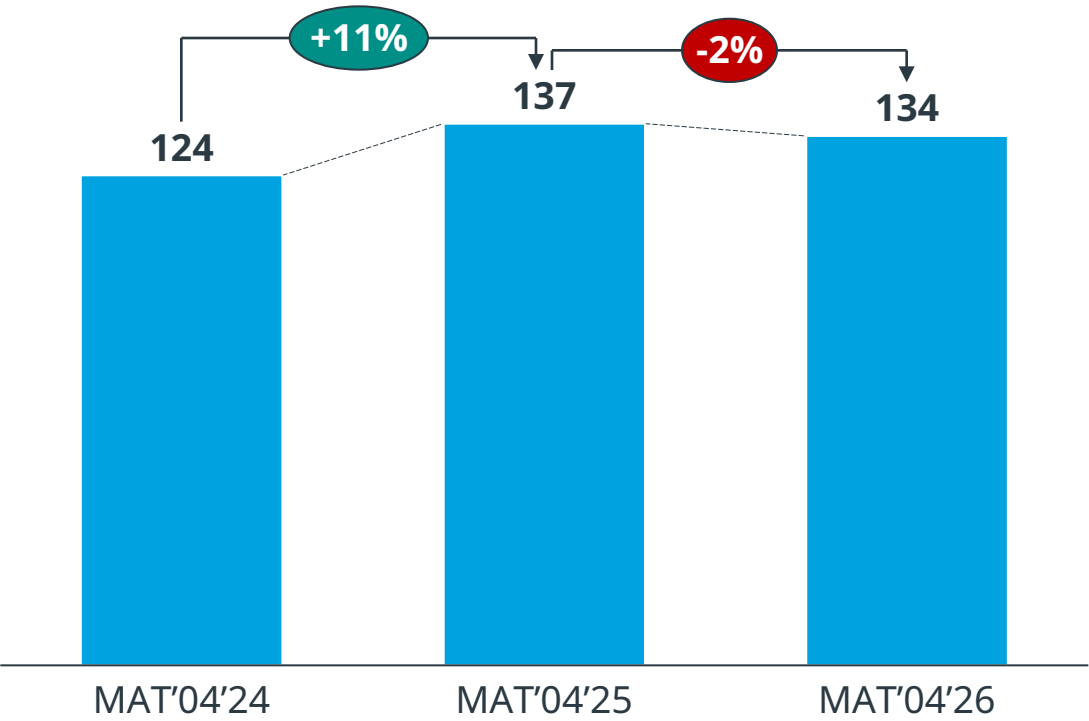


Georgia total pharma market

Total Sales by Value
Bln GEL



Total Sales by Volume
Mln Packs

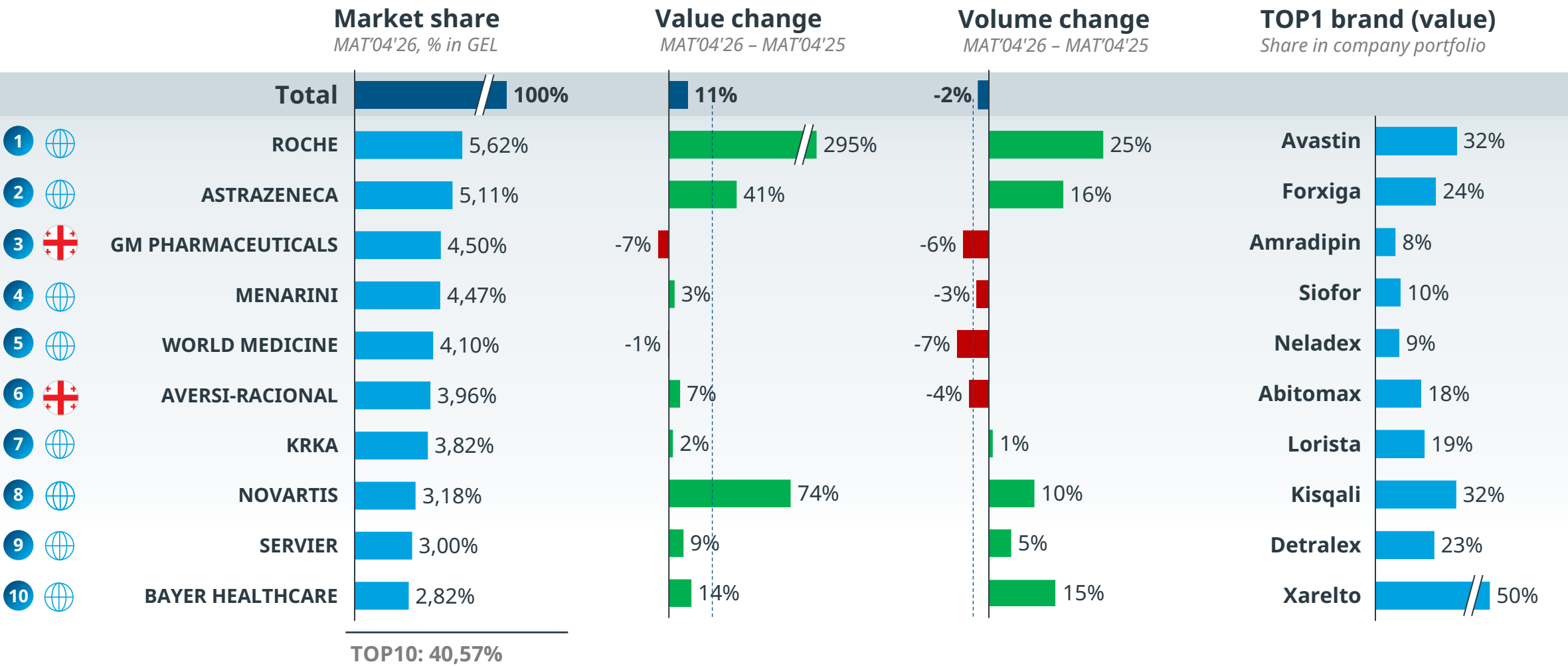


Retail

Indicator	GEL	USD	EURO	Packs	SU
Value MAT'04'26, Bln	1,8	0,7	0,6	0,1	5,4
Growth 26/25, %	11%	14%	5%	-2%	3%

The majority of the TOP10 companies show positive value dynamics comparing to the previous year

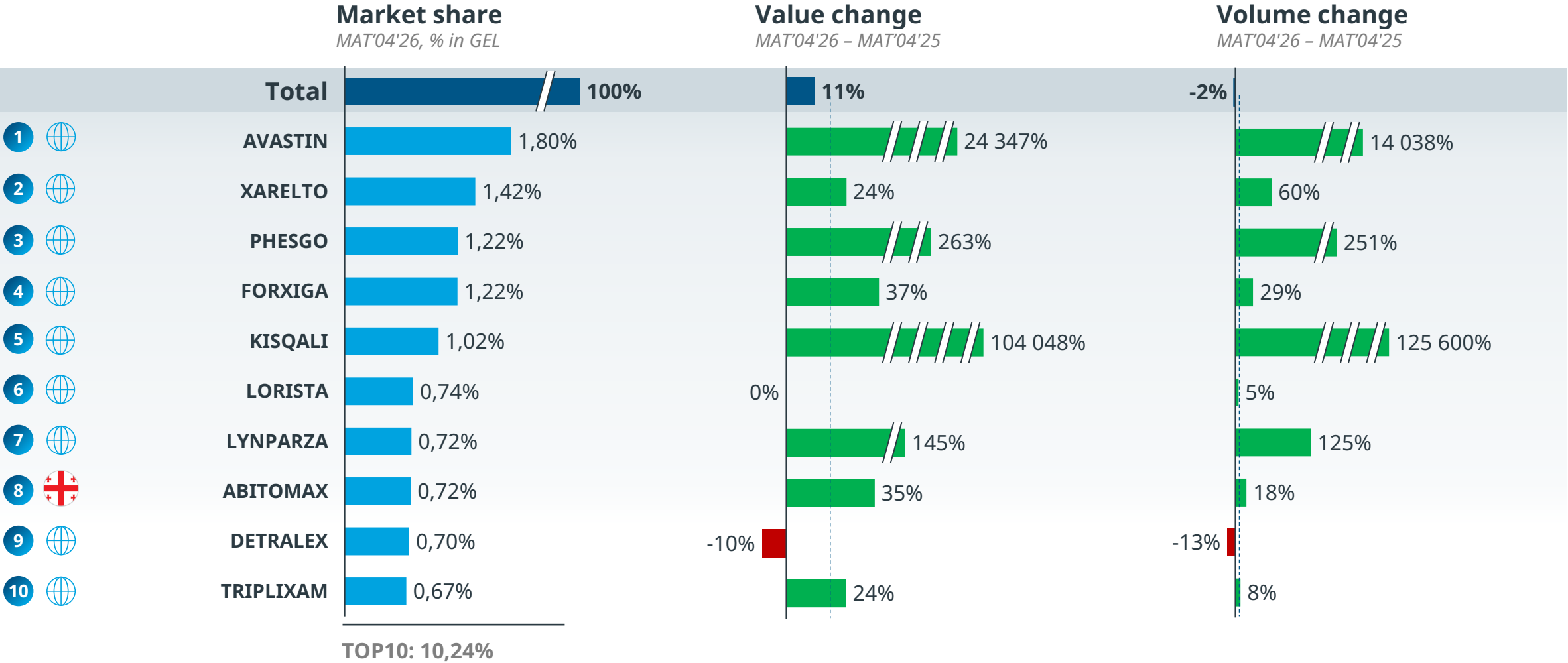
TOP10 overall ranking of companies by sales



The TOP10 brands list is mostly represented by international brands, except for Abitomax



TOP10 overall ranking of brands by sales



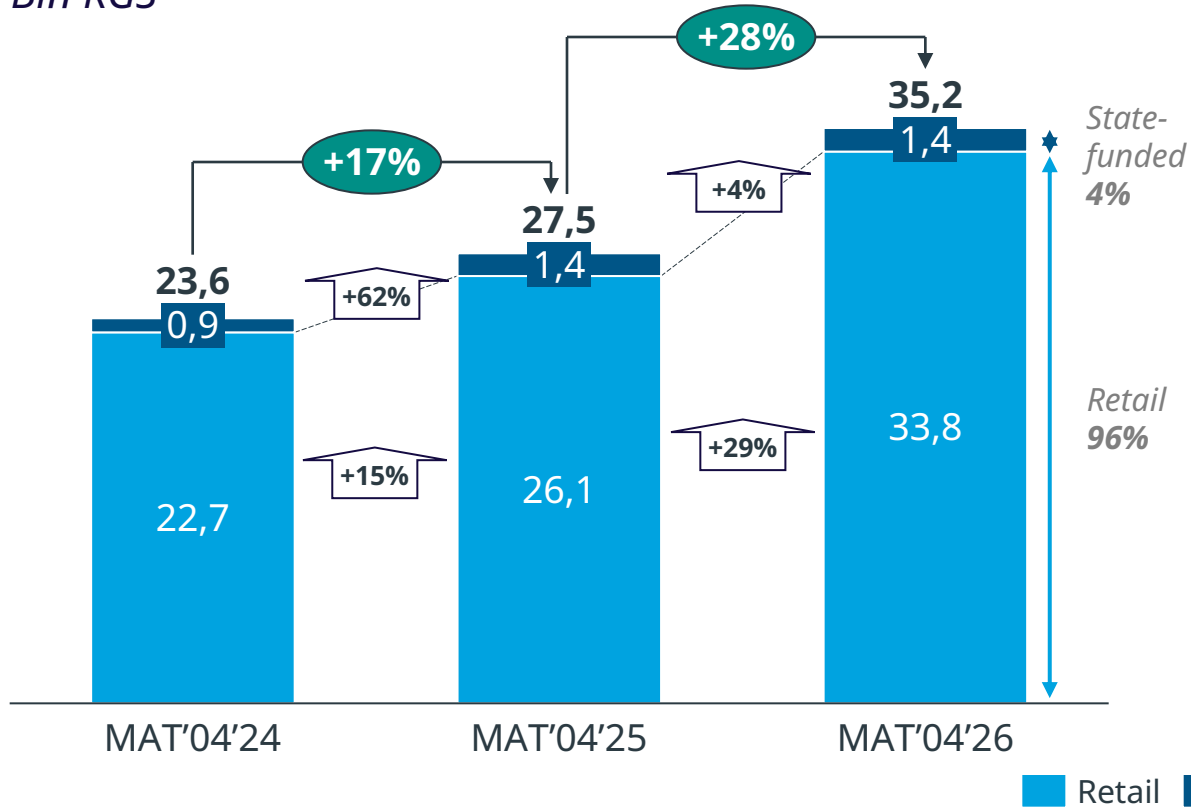
Total pharmaceutical market overview



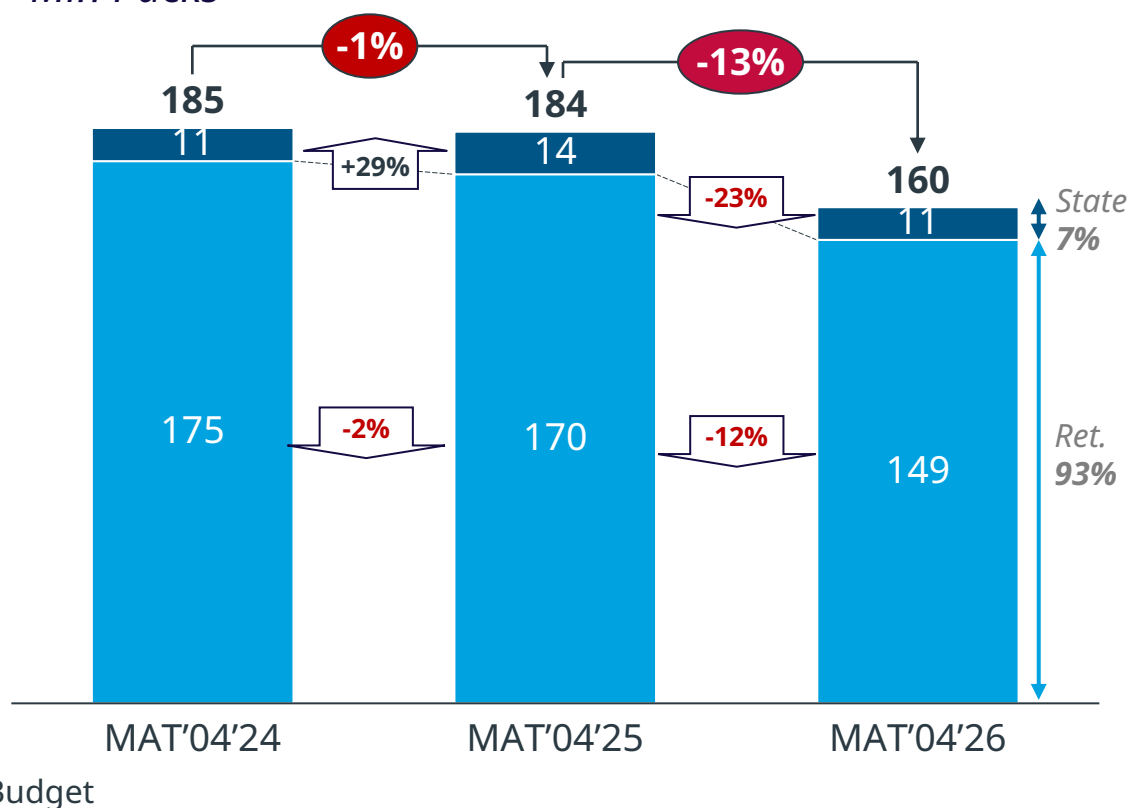
Kyrgyzstan pharma market is growing in value terms, primarily driven by the expansion of the retail segment

Kyrgyzstan total pharma market

Total Sales by Value
Bln KGS



Total Sales by Volume
Mln Packs

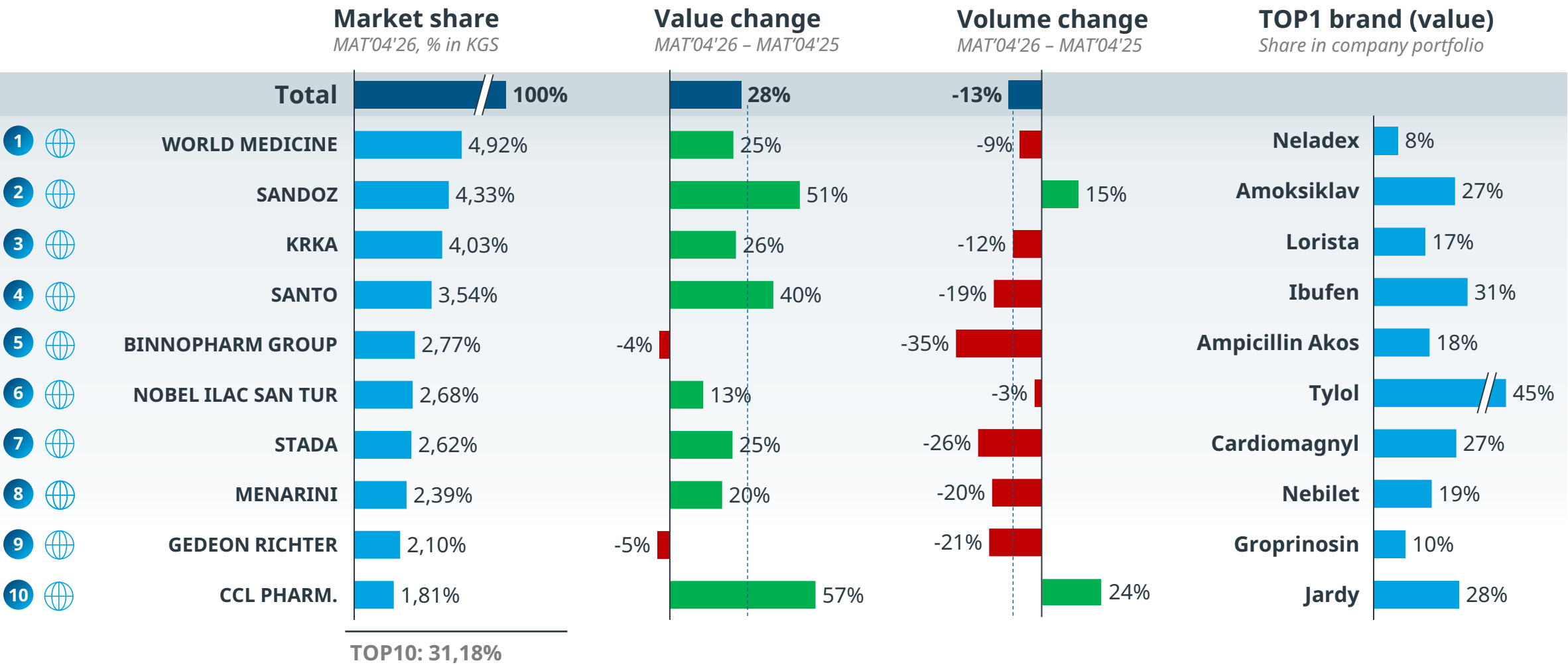


Indicator	KGS	USD	EURO	Packs	SU
Value MAT'04'26, Bln	35,2	0,4	0,3	0,2	5,0
Growth 26/25, %	28%	26%	17%	-13%	-18%

The majority of the TOP10 companies show positive value dynamics comparing to the previous year



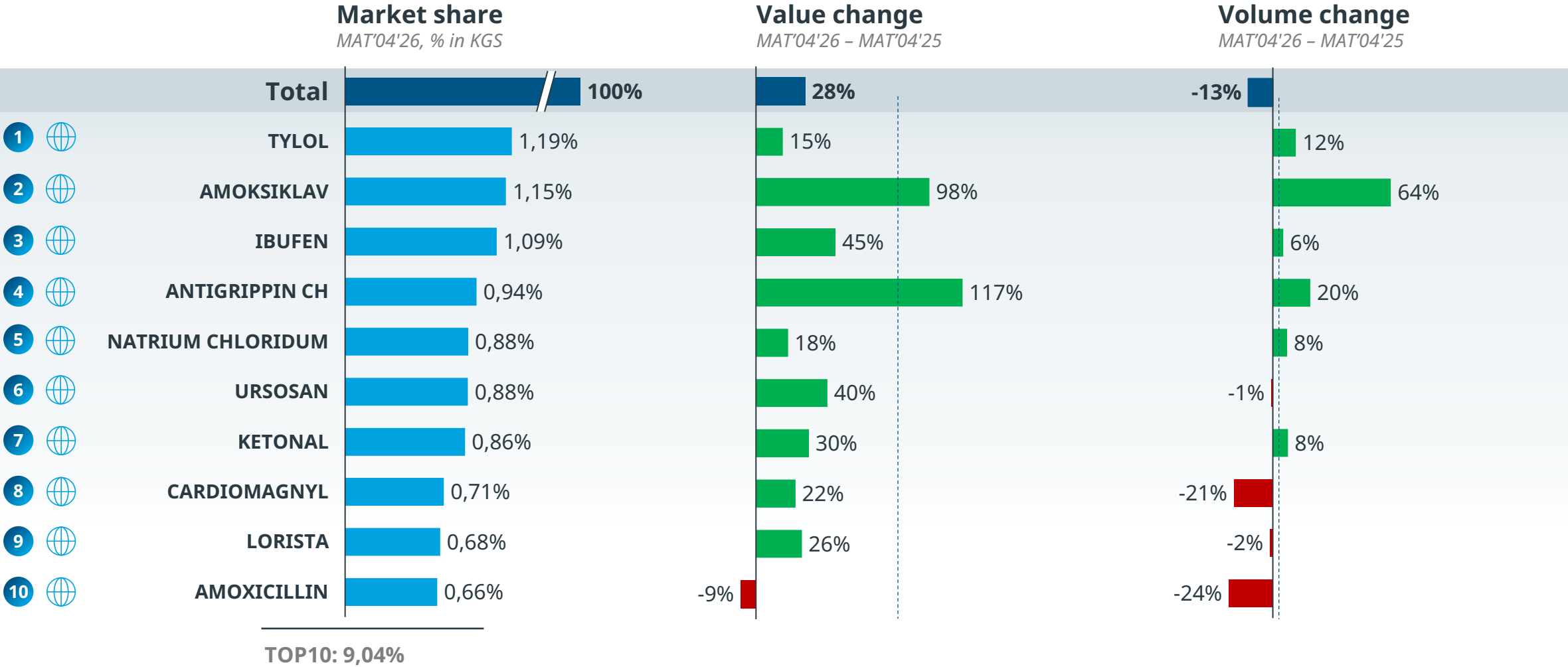
TOP10 overall ranking of companies by sales



Total pharmaceutical market overview

Most of the TOP10 companies are multinational, showing growth in both value and volume compared to the previous year

TOP10 overall ranking of brands by sales



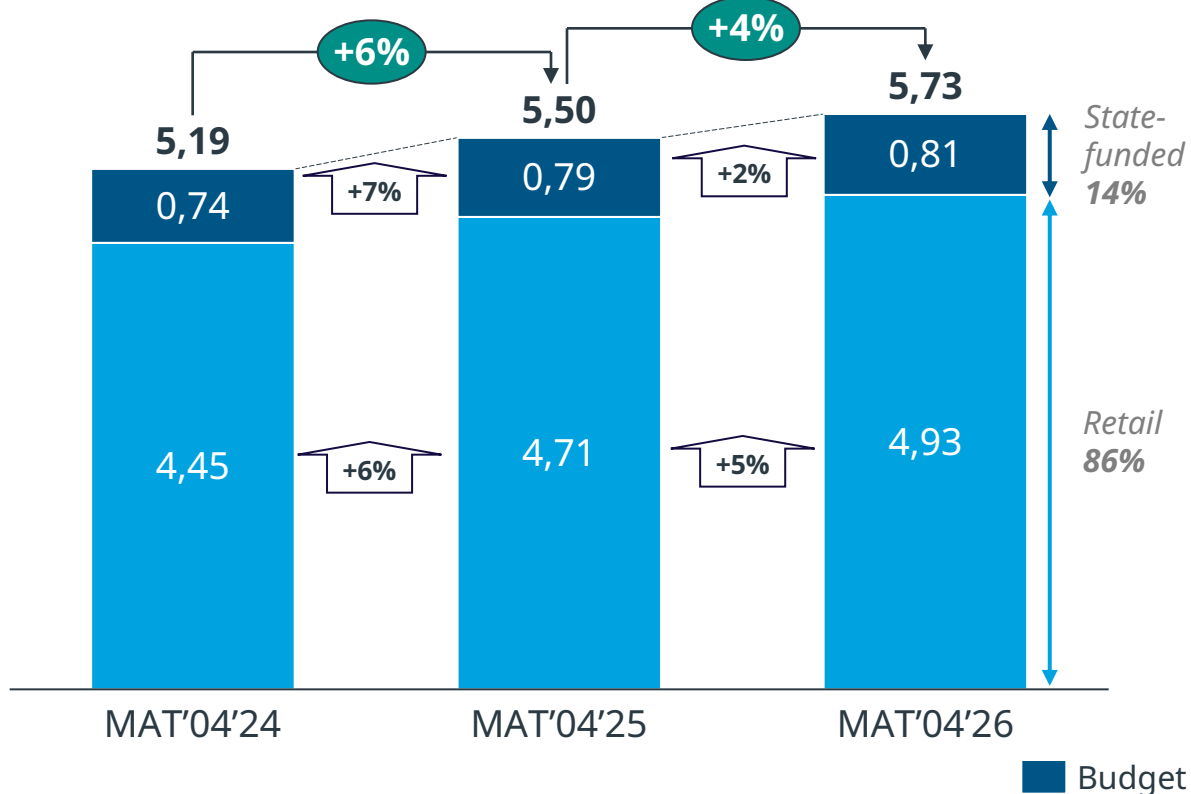
Total pharmaceutical market overview



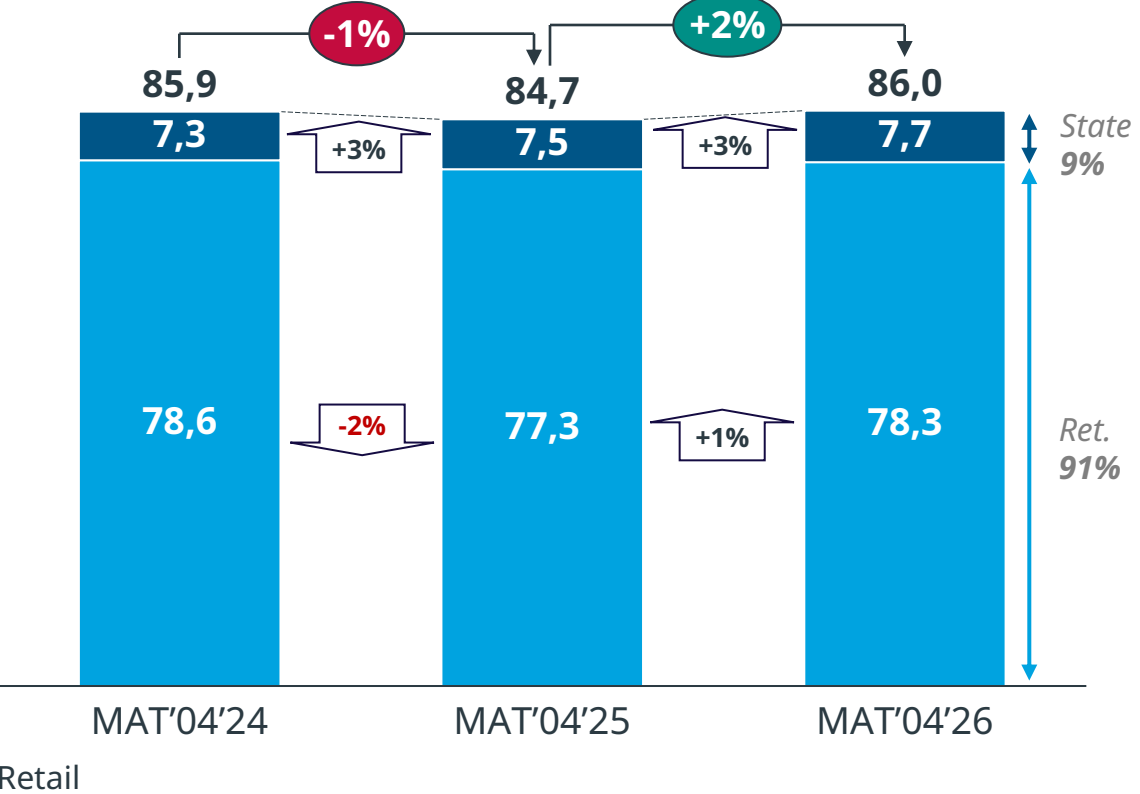
Moldova pharma market is growing in value terms, mainly driven by the positive performance of the retail segment

Moldova total pharma market by channels

Total Sales by Value
Bln MDL



Total Sales by Volume
Mln Packs

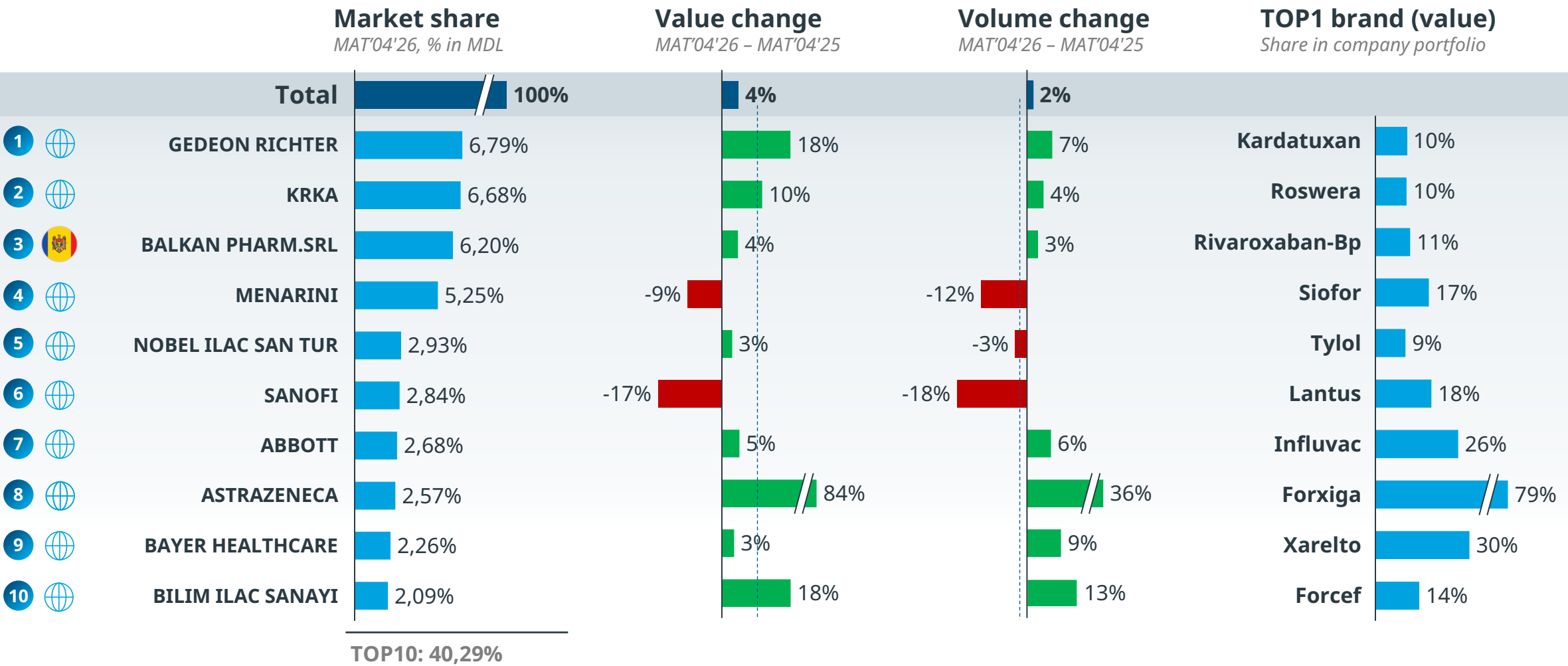


Indicator	MDL	USD	EURO	Packs	SU
Value MAT'04'26, Bln	5,7	0,3	0,3	0,1	6,8
Growth 26/25, %	4%	10%	2%	2%	-2%



Most of the TOP10 companies are growing in both value and volume terms compared to last year

TOP10 overall ranking of companies by sales

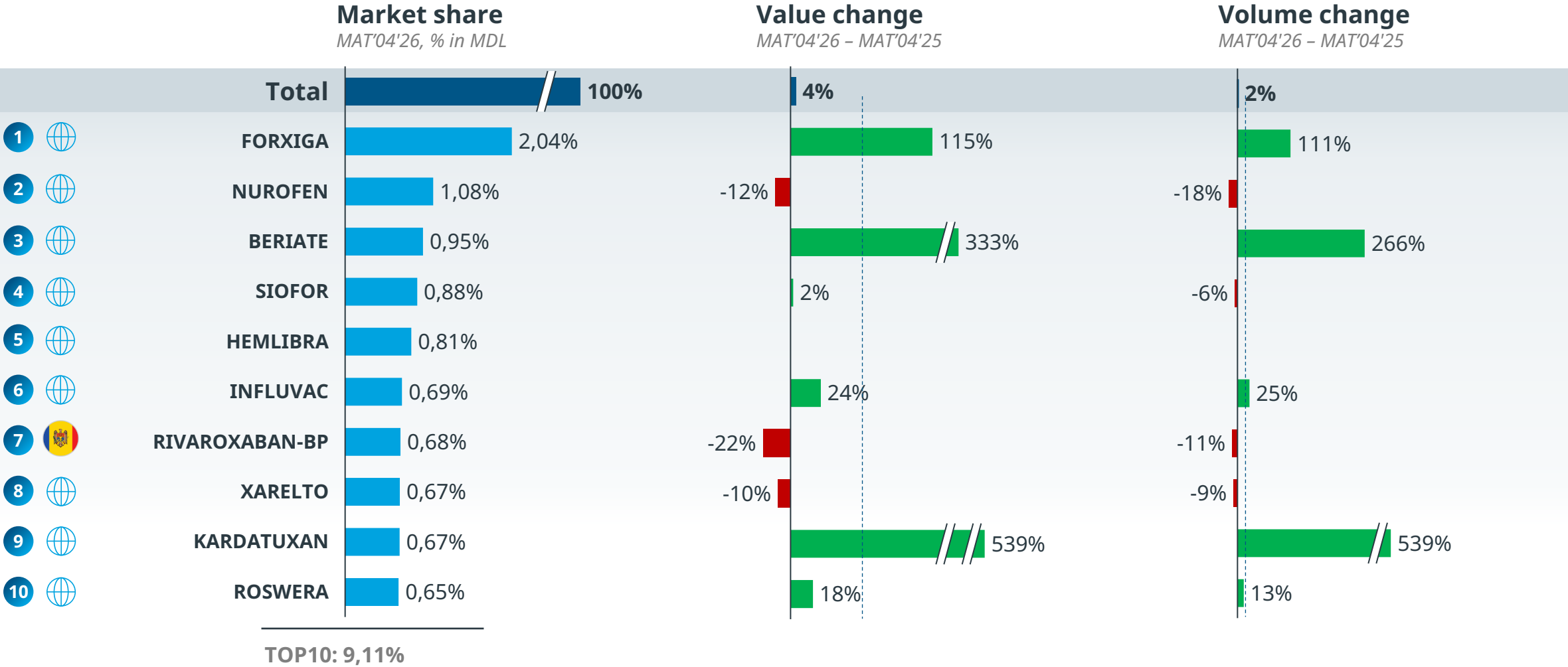


Total pharmaceutical market overview



Forxiga, Beriate, and Kardatuxan brands demonstrate the strongest value and volume growth among the TOP10 vs the previous year

TOP10 overall ranking of brands by sales



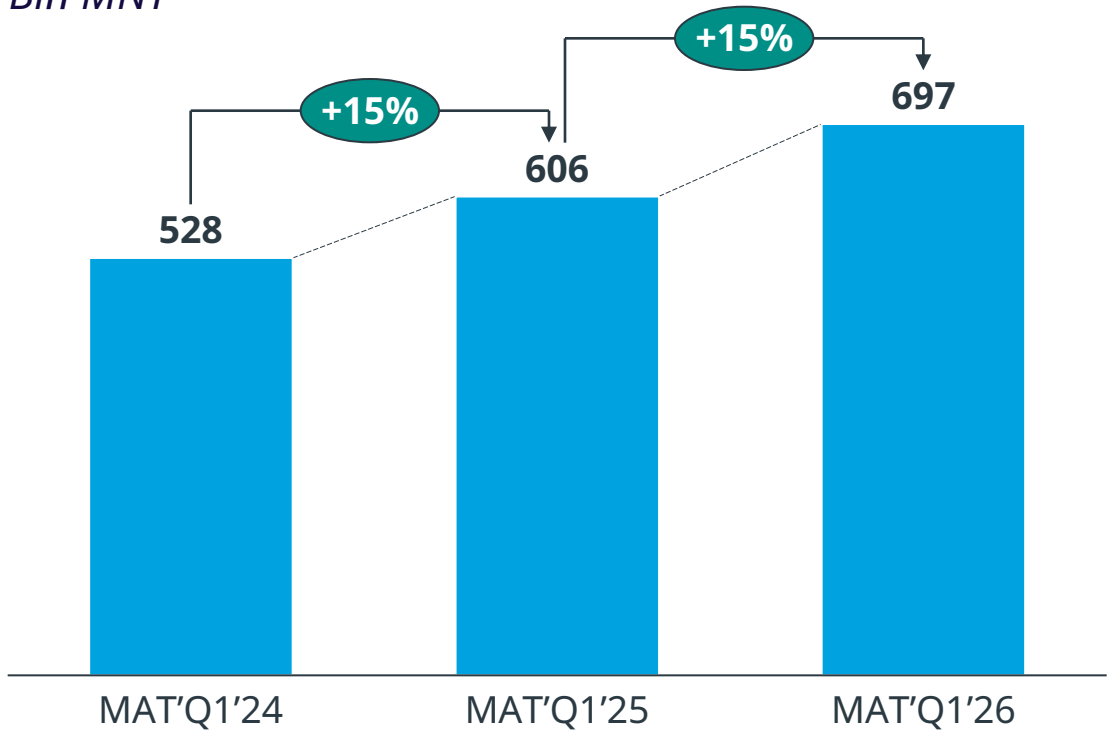
Total pharmaceutical market overview

Mongolia pharma market shows positive dynamics in value compared to the previous year

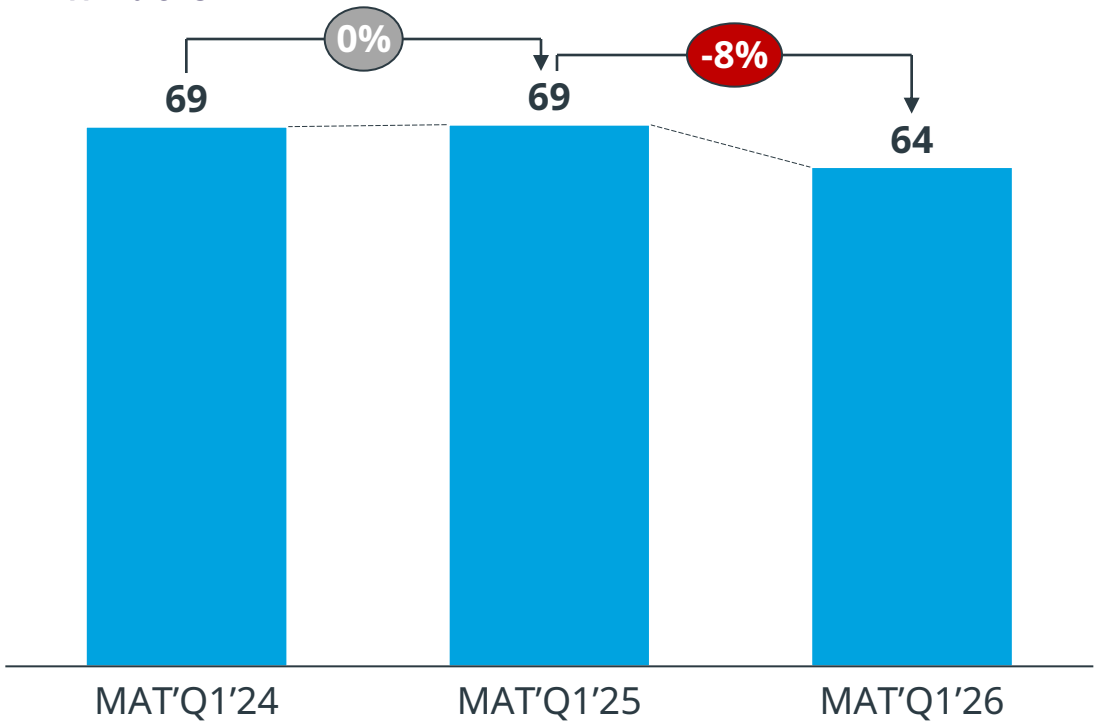


Mongolia total pharma market by channels

Total Sales by Value
Bln MNT



Total Sales by Volume
Mln Packs

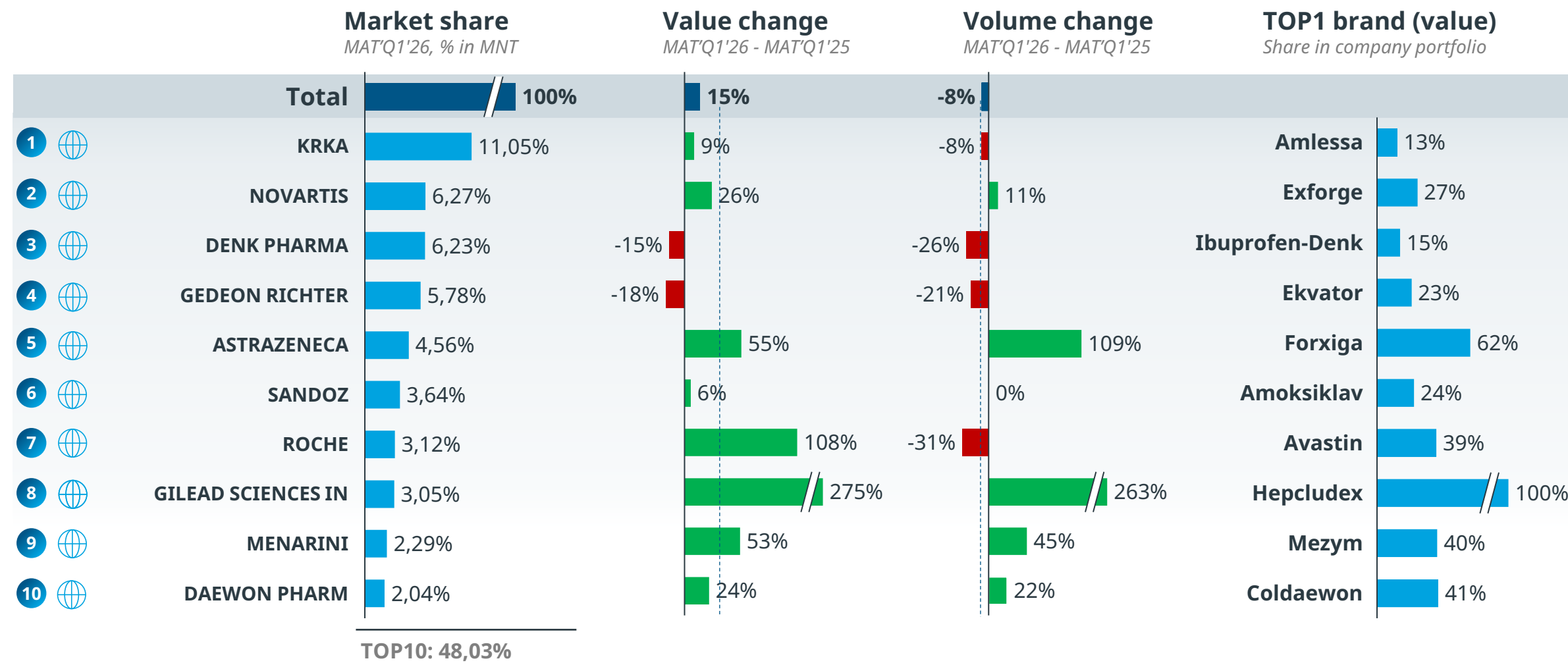


Retail

Indicator	MNT	USD	EURO	Packs
Value MAT'Q1'26, Bln	697,4	0,2	0,2	0,1
Growth 26/25, %	15%	10%	2%	-8%

The majority of TOP10 companies are showing positive value dynamics in the latest period

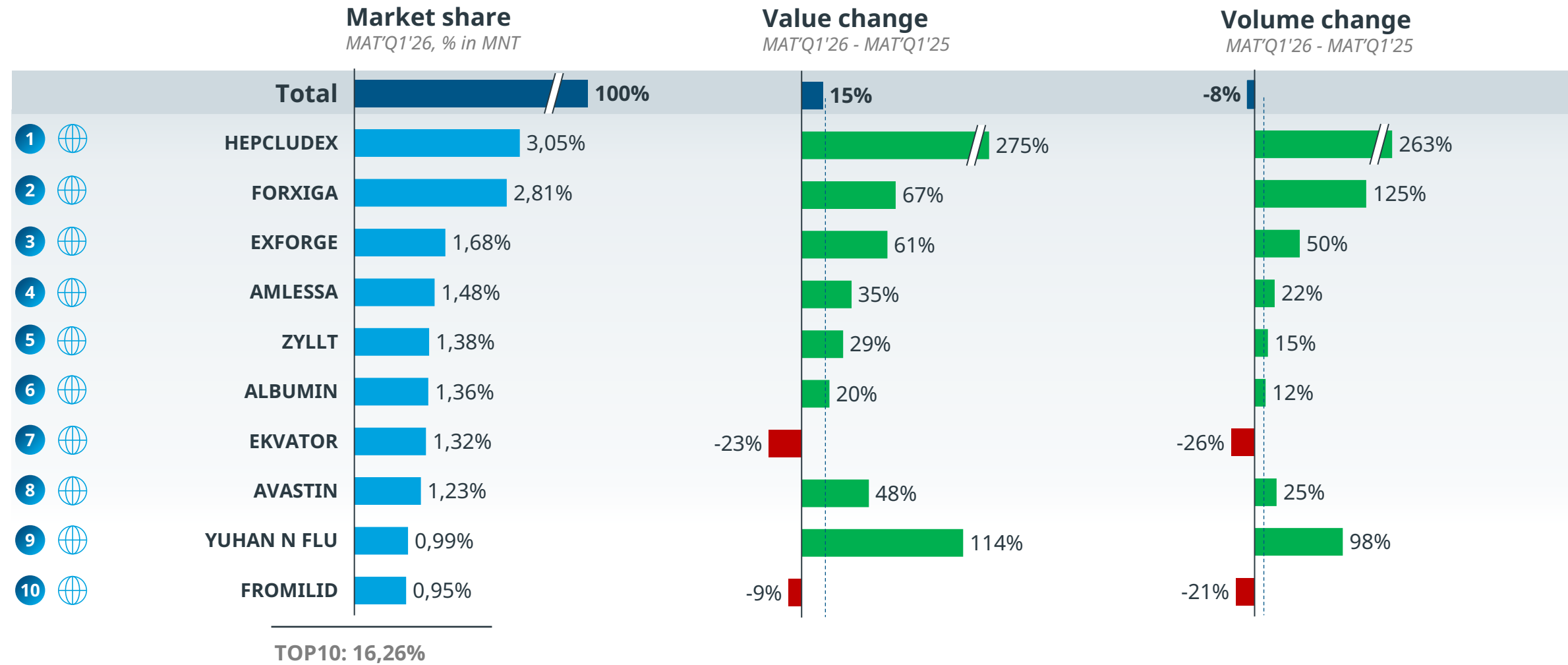
TOP10 overall ranking of companies by sales



Total pharmaceutical market overview

Most TOP10 brands are growing in both value and volume compared to the previous year

TOP10 overall ranking of brands by sales



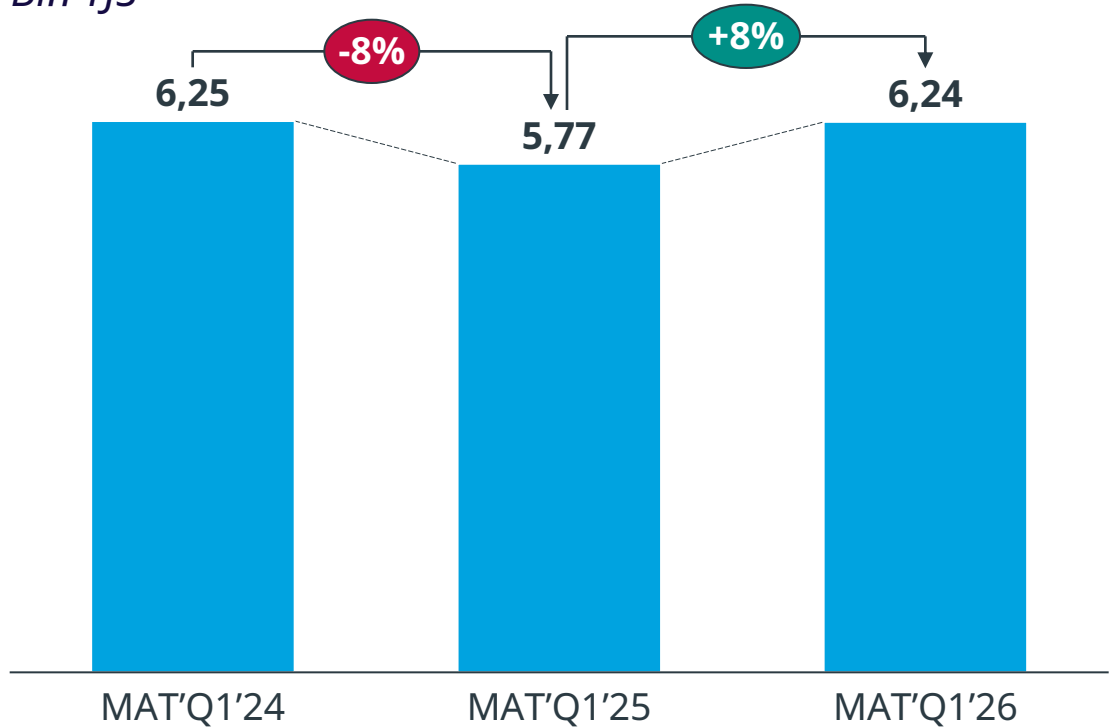
Total pharmaceutical market overview



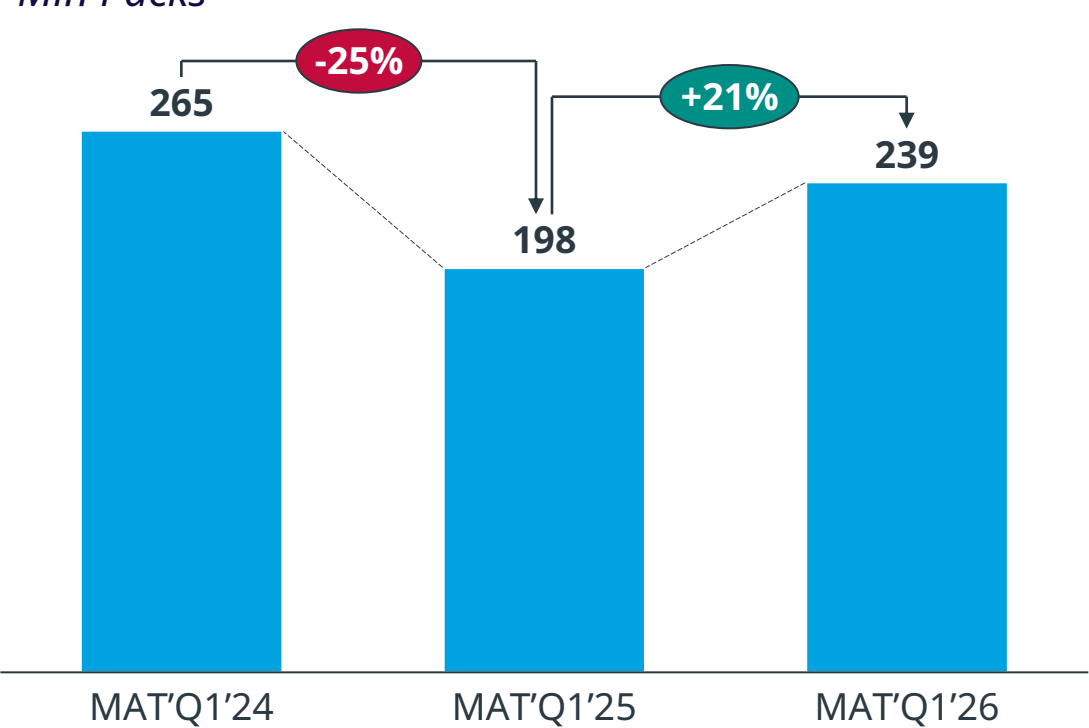
Tajikistan's pharmaceutical market is growing in both value and volume compared to the previous year

Tajikistan total pharma market by channels

Total Sales by Value
Bln TJS



Total Sales by Volume
Mln Packs



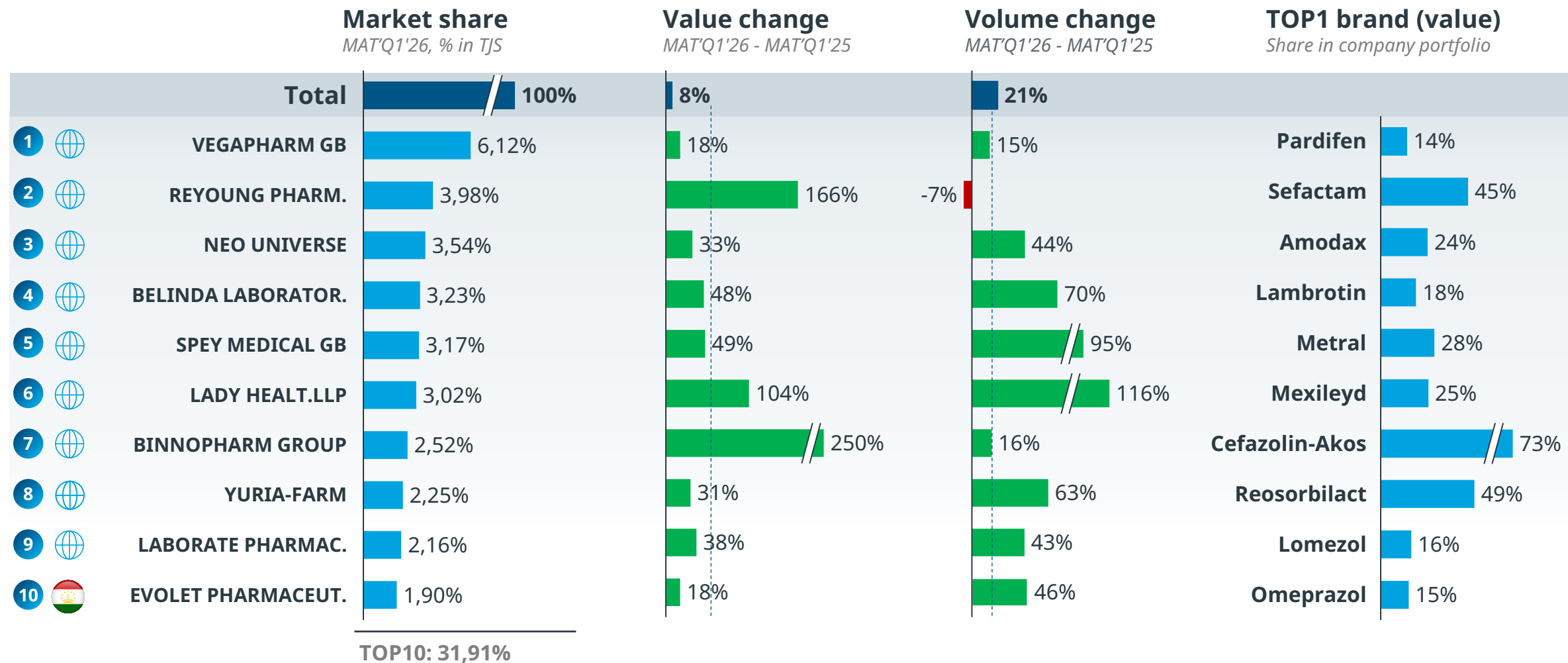
Retail

Indicator	TJS	USD	EURO	Packs	SU
Value MAT'Q1'26, Bln	6,2	0,7	0,6	0,2	6,3
Growth 26/25, %	8%	22%	14%	21%	26%



All TOP10 companies show value growth compared to the previous year

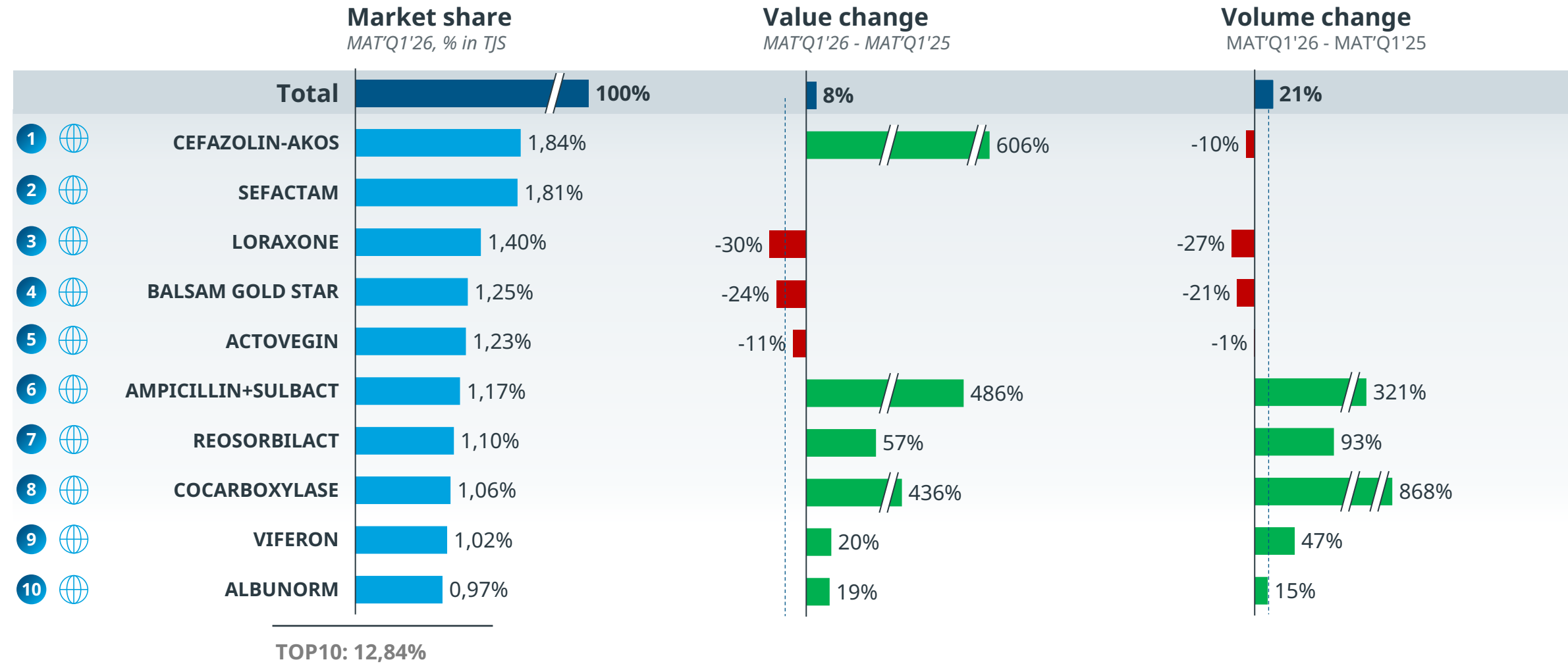
TOP10 overall ranking of companies by sales





The majority of TOP10 brands demonstrate growth in value terms vs the previous year

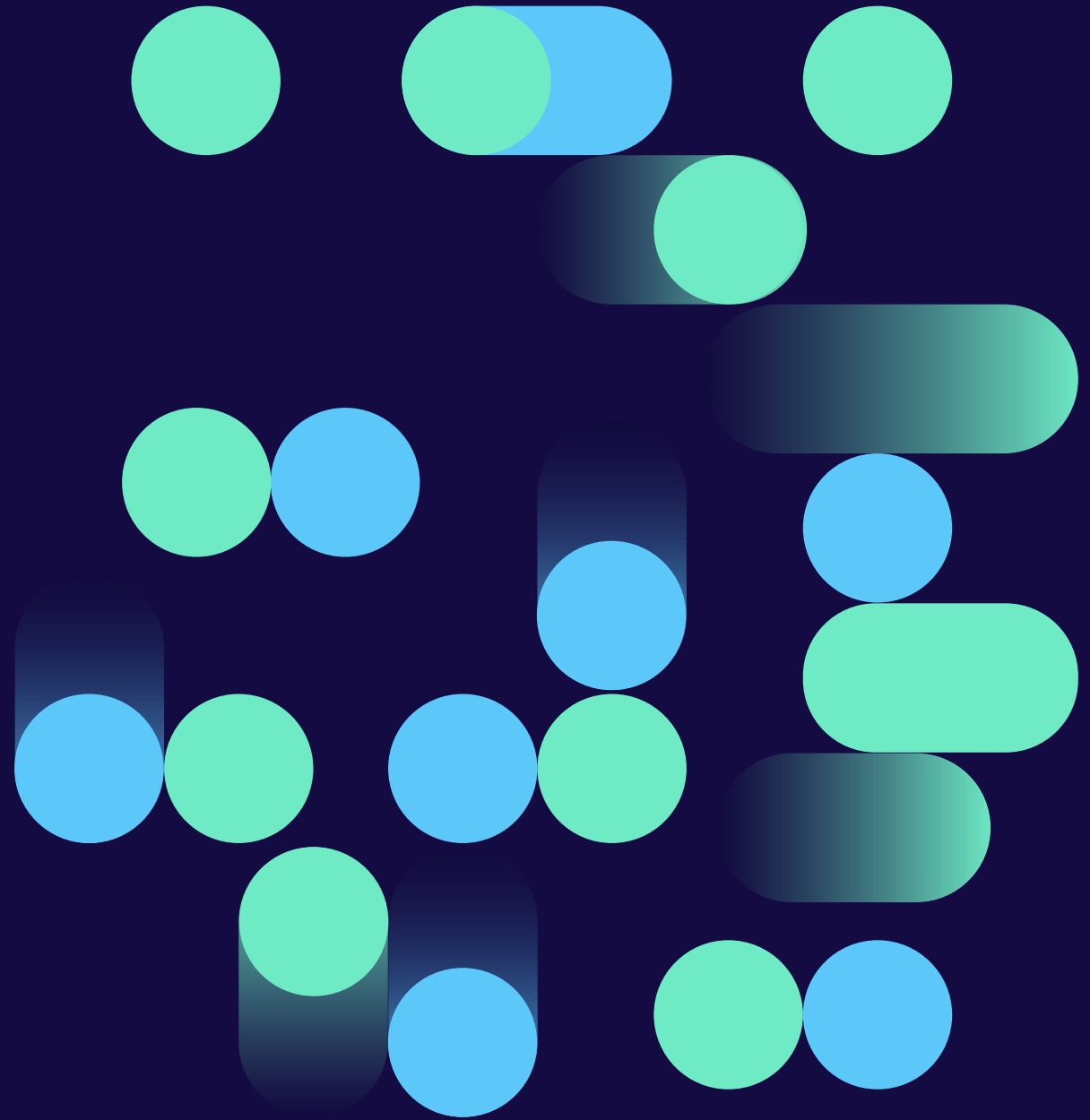
TOP10 overall ranking of brands by sales



Total pharmaceutical market overview



IQVIA services in Eurasia





INFORMATION



Global offerings

- MIDAS
- CH Customized Insights
- Analytics Link Ecosystem
- Ark Patent Intelligence
- Chemical Intelligence



Local offerings

Pharma market audits

- Retail audits
- Budget audits
- Audits of import and local production of drugs



OneKey® database

- >180k physicians / specialists
- >14k medical organizations
- >32k pharmacies



LRx RPA

- Drugs prescriptions by indication
- RWE / RWD



TECHNOLOGY



GenAI

- Reps Assistant
- MSLs Assistant
- Persona Based Training Assistant
- Marketing Content Generation
- "End-customer" Assistant (HCPs, Pharmacists, Patients, Consumers)
- CRM Help Desk
- Scientific literature review
- Medical & Compliance Assistant



Safety, Regulatory & Quality

• IQVIA Consent

Consent management, collection and storage

• Commercial Compliance

Solutions and consulting to build an effective compliance system: policies and SOPs, monitoring and audit, risk analytics, and team training

• Fair Market Value (FMV)

Fair payments to KOLs and HCPs



Business Analytics capabilities

Ready-to-go and custom-tailored business intelligence solutions.

Support at any stage: from identification of data sources, data comparison, ETL development, data showcase design, identification and calculation of key performance indicators, report development, to training of end users



CONSULTING



Commercial Effectiveness

- Sales Force sizing and deployment
- Territory prioritization
- Pharmacy and physicians' segmentation
- ROI analysis of trade marketing activities
- KPI framework development
- KPI development and tracking



Management Consulting

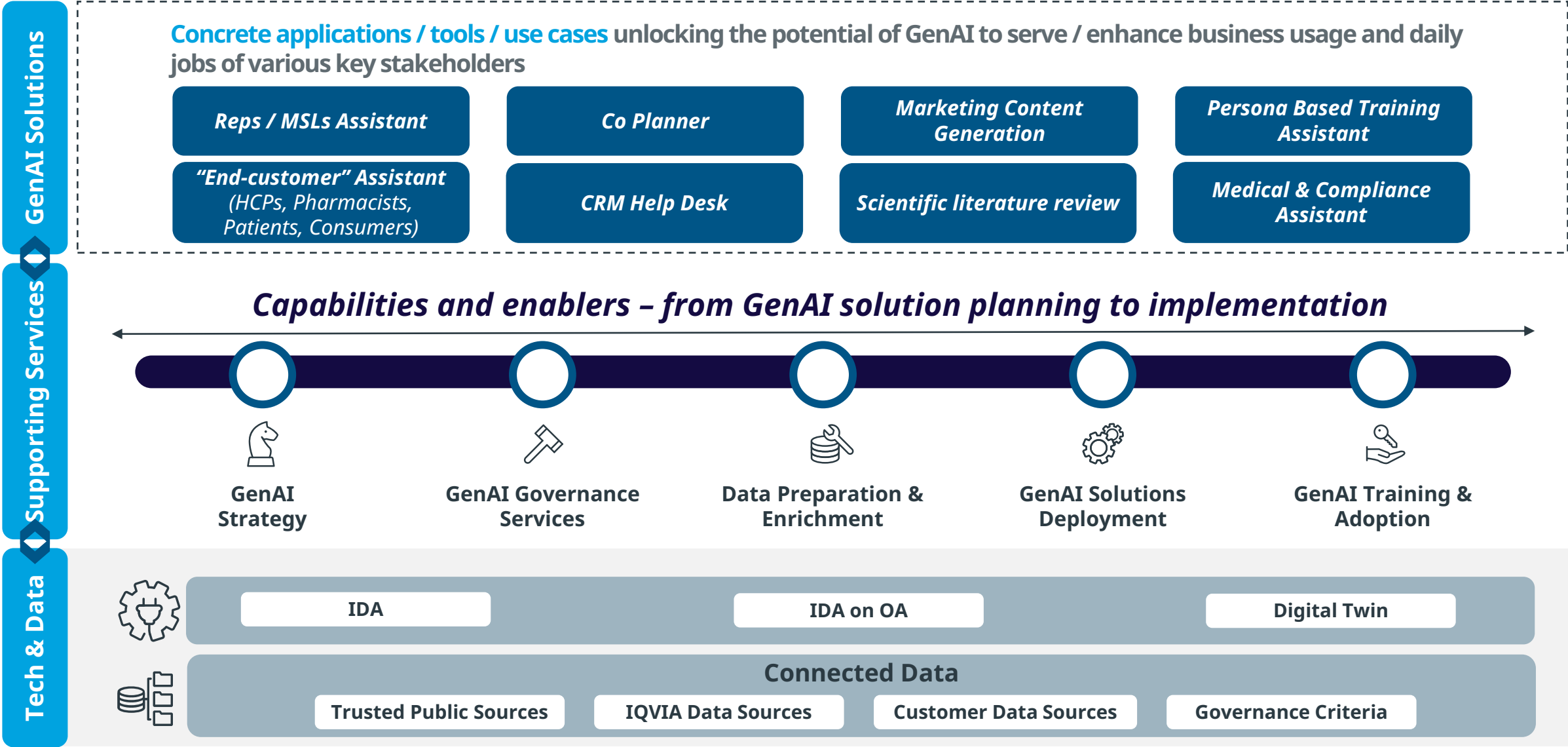
- Commercial Due Diligence
- Portfolio strategy & targets' search
- Global market expansion
- Go-to-Market strategy
- Pricing and Market Access
- Launch Excellence
- Promo Mix Optimization
- Market landscape & forecasting



Primary Market Research

- In-depth interviews and focus-groups with various groups of stakeholders (KOLs, HCPs, pharmacists, consumers)
- Ad-hoc projects: U&A, Price elasticity, Rep checks, KOLs mapping etc.
- Syndicated studies

IQVIA can support you to unlock the potential of GenAI in your business processes



Case study: CRM Assistant enabling field force to reach new heights of personalization, efficiency & insights generation

CRM Assistant

Situation

- Client willing to **leverage emerging technologies** (advanced Large Language Models (LLMs)) to **enhance customer facing teams pre & post-call planning**
- Currently, Sales Rep and especially KAMs were dealing with much information and were **not able to easily get the right HCP insight at the right time in front of the right solution**
- Main request was to leverage GenAI **on top their usual CRM platform** to **ease the life of Reps & KAMS** when engaging with HCPs

Results

Extrapolation of long-term outcomes based of 1st months of usage results

+27%

Time saving in HCPs call preparation & follow-up

85%

Users Satisfaction on HCP insights generated and ease of use

66%

Of users considering the CRM assistant as an help to create **more valuable engagement with HCP**

Solution

A CRM Assistant **Q&A tool powered by genAI** to aid **insight generation from CRM, sales and external data**:

Generate answers from Natural languages queries coming from KAMS & Reps on:

- **Account plan**
- **Recommendations for next call** (e.g. available content relevant to share)
- **HCP past engagement** (email received / opened, clicked)
- **Generate Medical insights** from MSLs notes and advisory boards

CRM assistant is **directly integrated into CRM platform / interface** via a Q&A webpage link integrated on the homepage

Supportive onboarding and training to upskill end users **on good prompting and questions practices to ensure relevancy**

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