



Facts from IQVIA

M01 2022



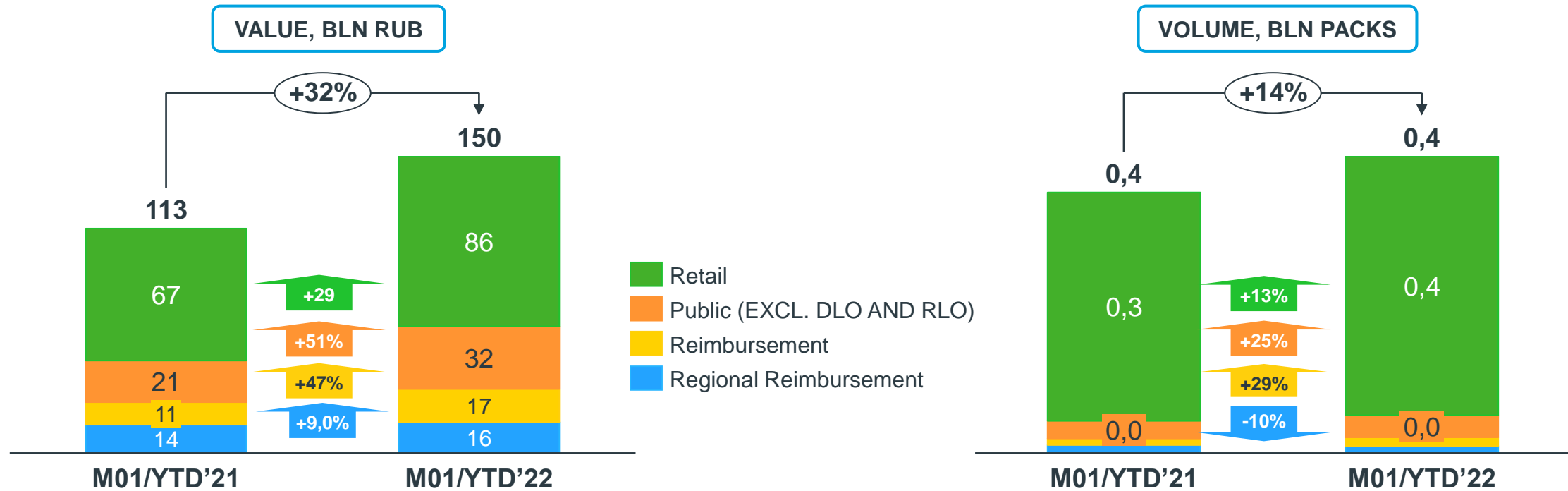
8,7%



INFLATION

Russian pharma market growth in Jan 2022

Market grew by 32% in value and 14% in volume



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

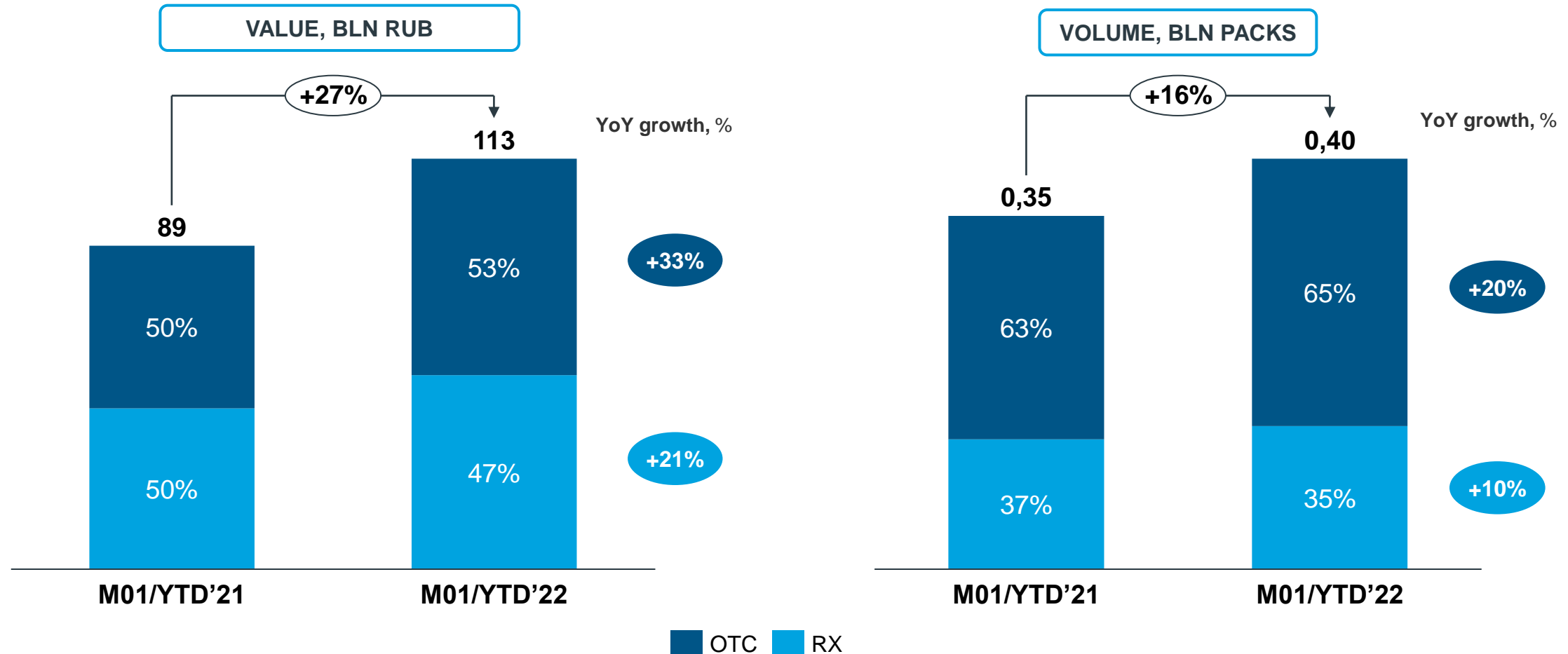
Indicator	RUB	USD	EUR	PACKS
Value M01/YTD'22, Bln.	150	2,0	1,7	0,4
Growth M01/YTD'22, %	▲ 32%	▲ 29%	▲ 39%	▲ 14%

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



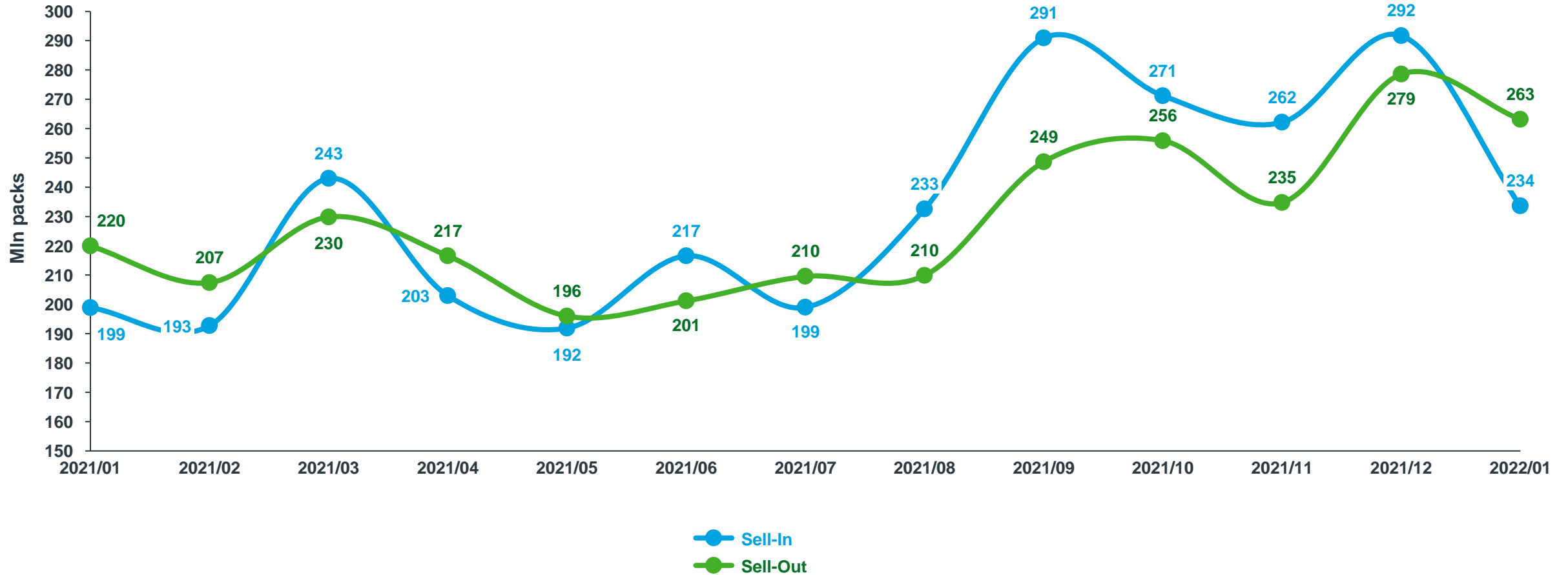
Russian pharma market increase in Jan 2022

Retail Sell-Out: Market grew by 27% in value and 16% in volume



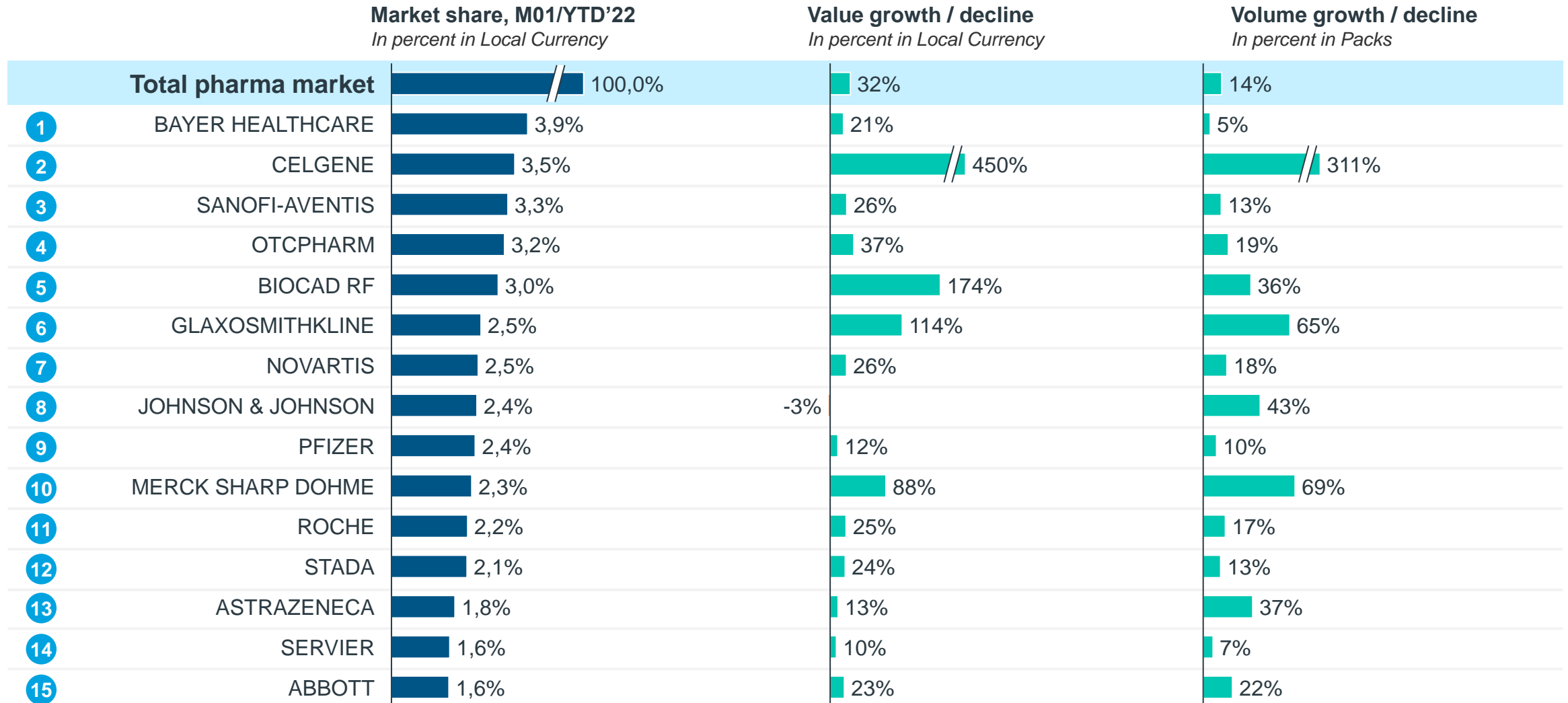


Sell-In vs Sell-Out, OTC registered drugs



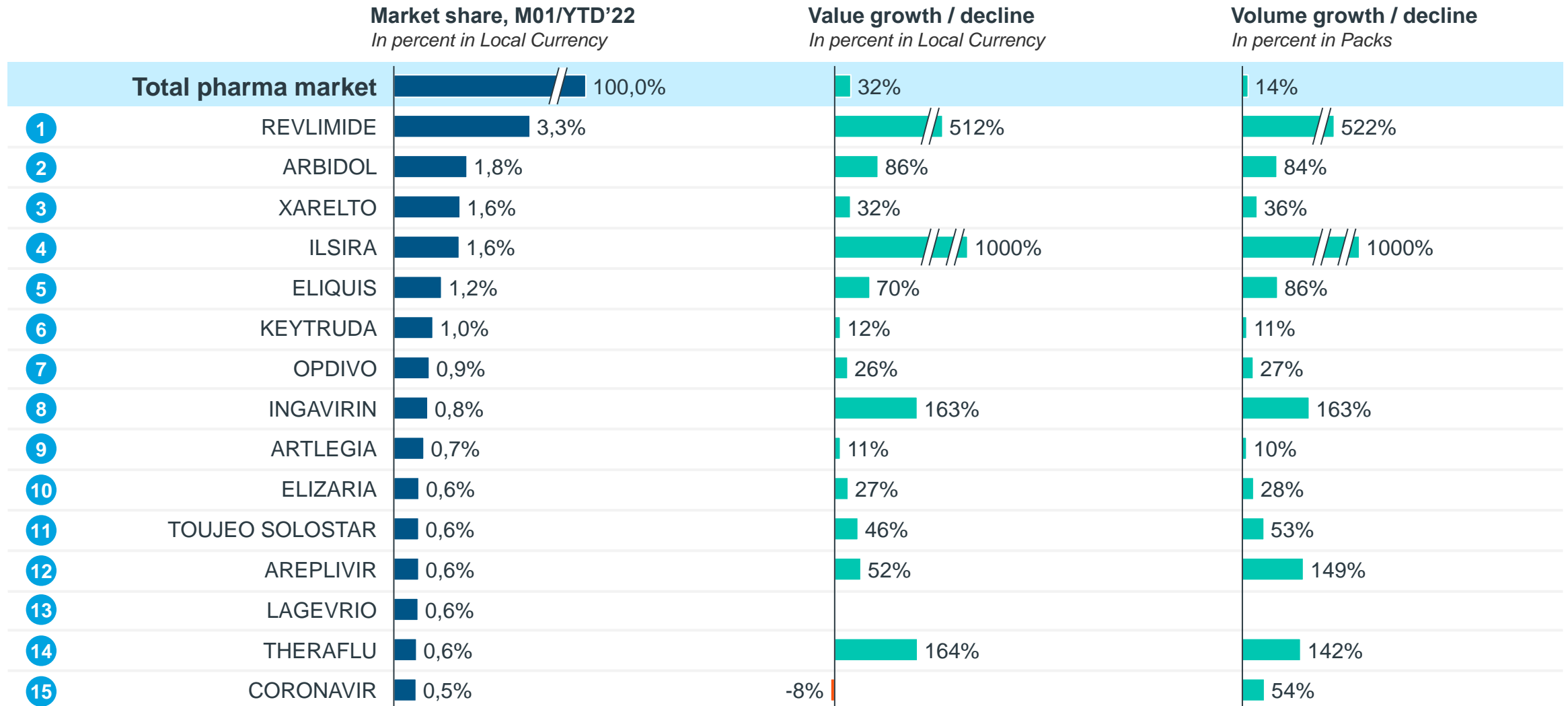


TOP-15 corporations on Russian market, Jan 2022

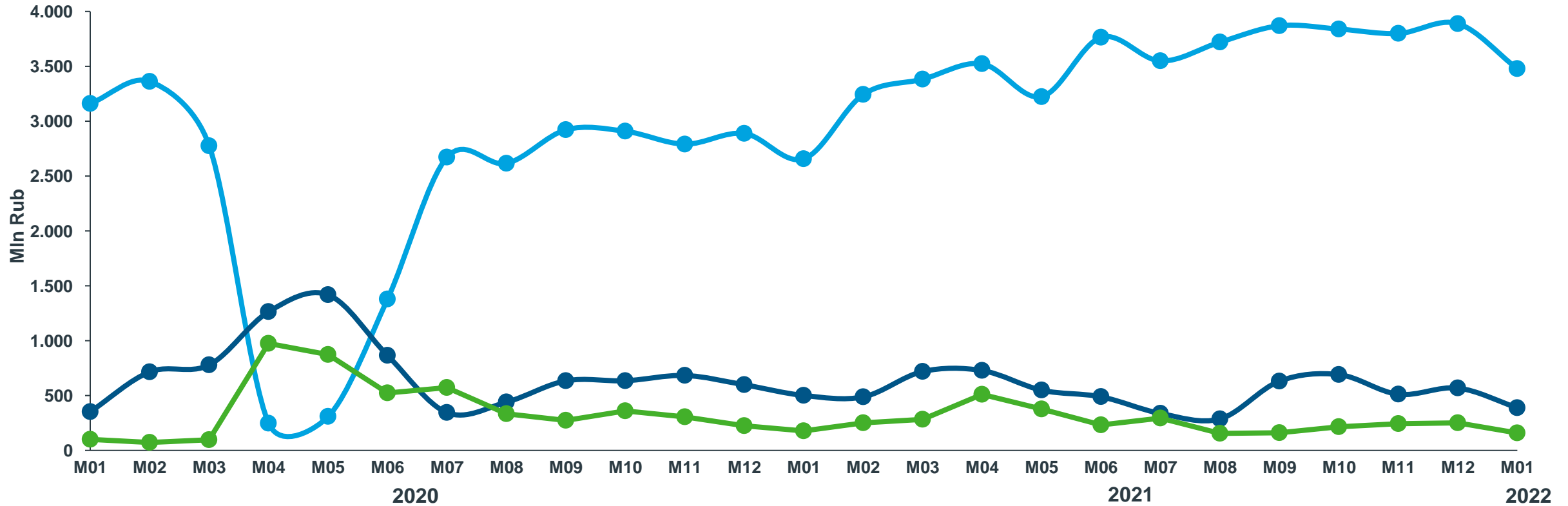




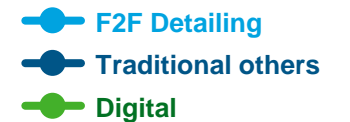
TOP-15 brands on Russian market, Jan 2022



Promotional interactions in value Rub by channel in Russia, January 2020 – January 2022



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

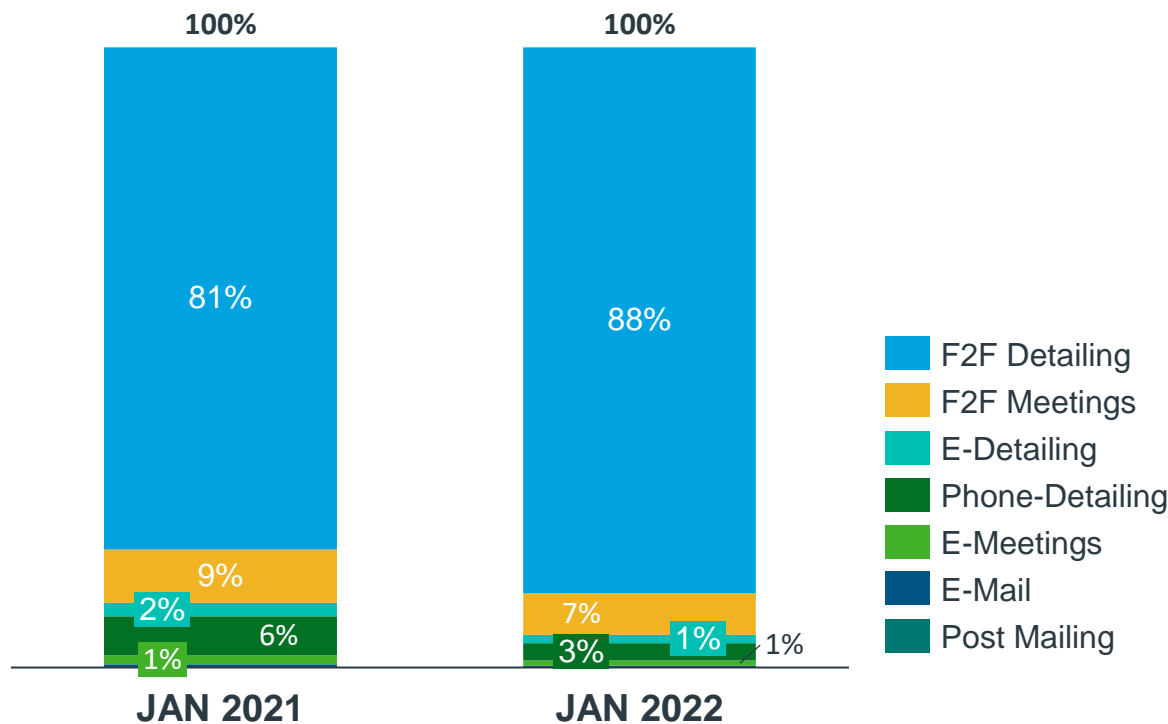


Value – a cost of each interaction projected on doctor’s universe

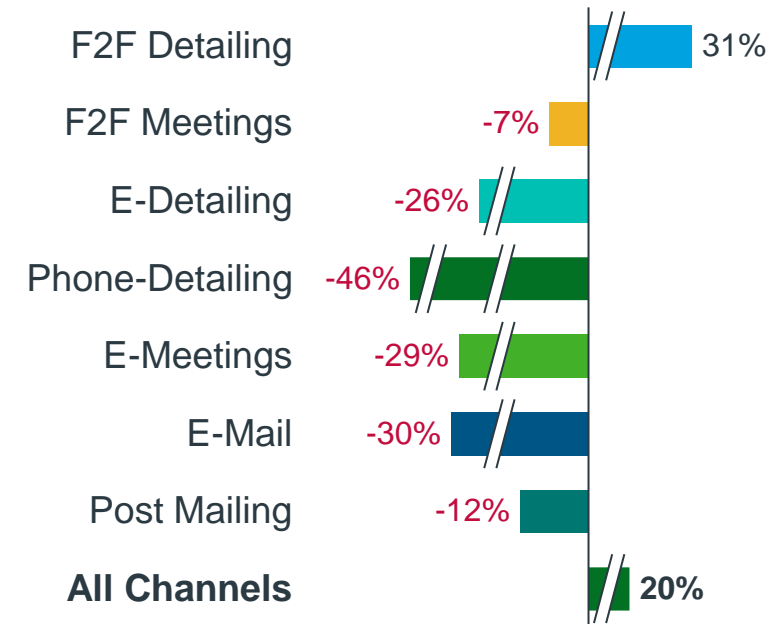
Total Market overall promotional value in Rub increased by 20%, January 2022 vs 2021



Promotional value in Rub share by channel



% Changes in promotional value in Rub by channel January 2022 vs 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

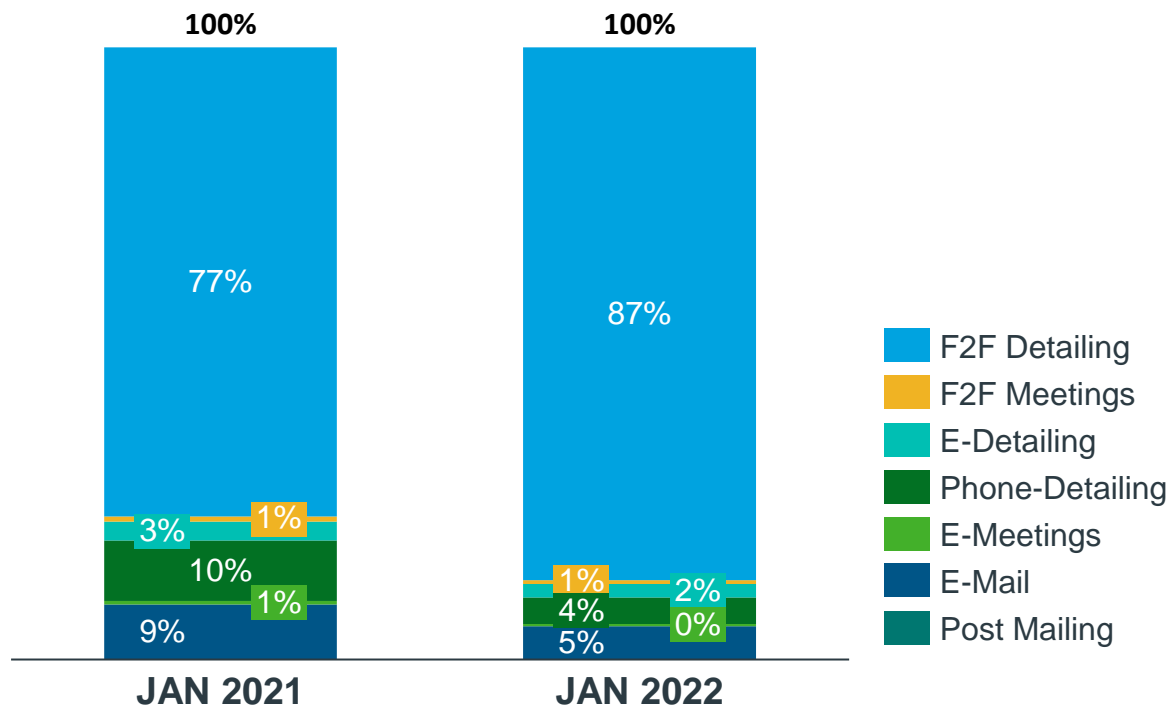
Value – a cost of each interaction projected on doctor’s universe

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.

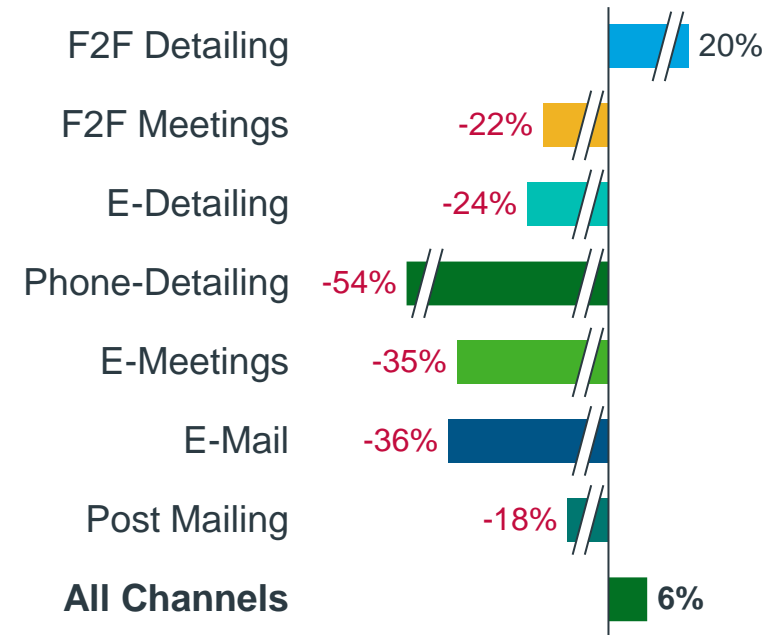
Total Market overall promotional volume (contacts) increased by 6%, January 2022 vs 2021



Promotional value in Rub share by channel



% Changes in promotional volume (contacts) by channel January 2022 vs 2021



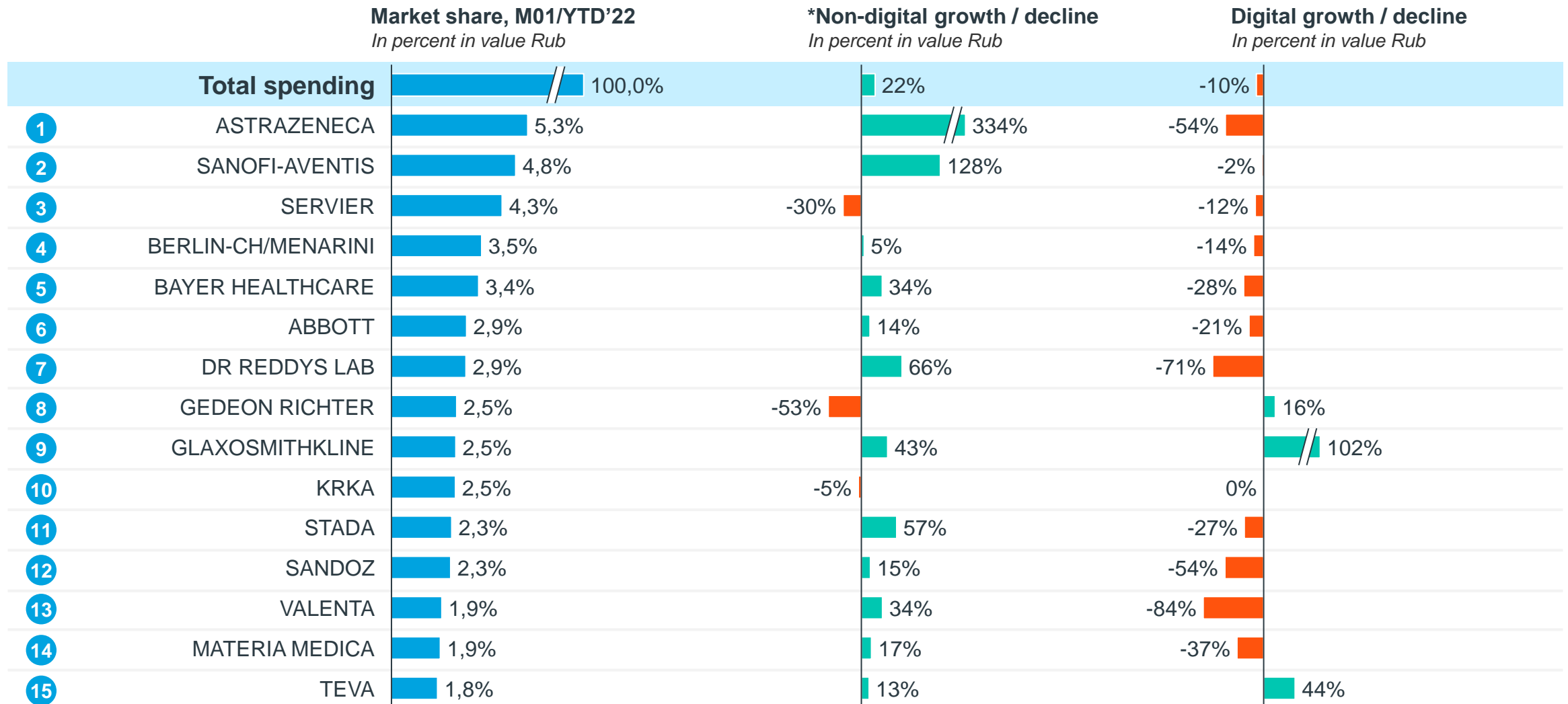
F2F Detailing – Reps visits. **Traditional others:** 1) F2F meetings – group meetings, round tables etc, 2) Phone Detailing – phone calls, 3) E-mail – communication via email. 4) Post Mailing – paper mails. **Digital:** 1) E-detailing – 1-1 calls visits using digitabl platforms 2) E-meetings – group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

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, January 2022



*Non-digital: F2F Detailing + Traditional others.

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



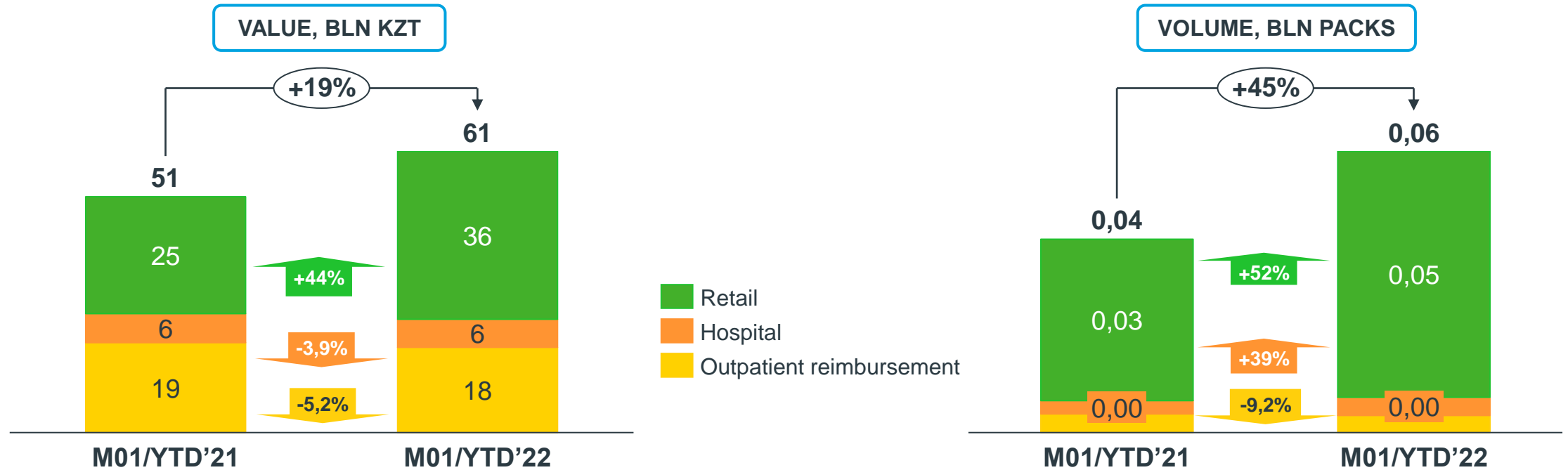
8,5%



INFLATION

Kazakhstan pharma market growth in Jan 2022

Market grew by 19% in value and 45% in volume

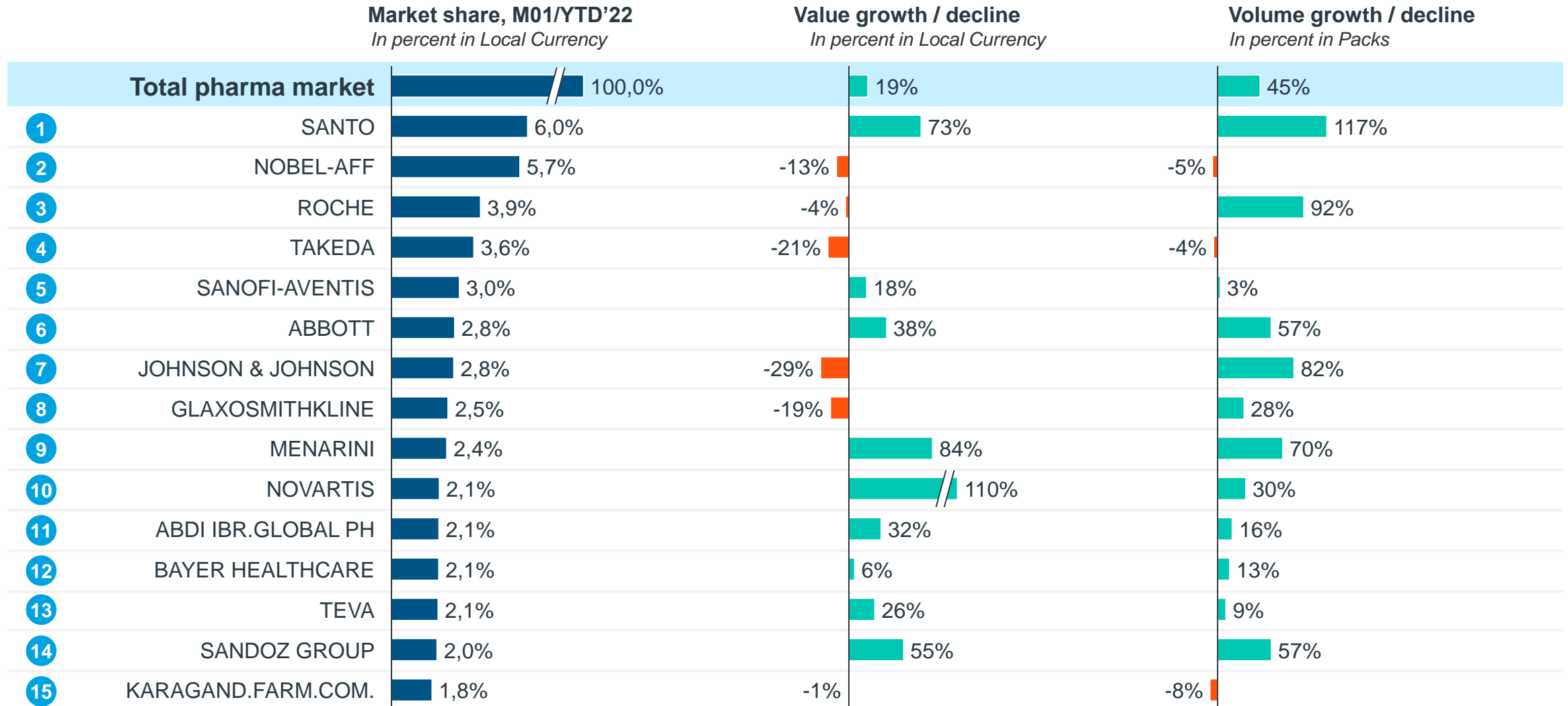


Indicator	KZT	USD	EUR	PACKS
Value M01/YTD'22, Bln.	61	0,14	0,12	0,06
Growth M01/YTD'22, %	▲ 19%	▲ 16%	▲ 25%	▲ 45%

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 2022





TOP-15 brands on Kazakhstan market, Jan 2022

		Market share, M01/YTD'22 <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%	19%	45%
1	HERCEPTIN	1,6%	-8%	-11%
2	NIMESIL	1,2%	261%	268%
3	IMMUNATE	1,2%	63%	4%
4	TRANSLARNA	1,1%	81%	73%
5	THERAFLU	1,1%	74%	41%
6	KEYTRUDA	1,0%	50%	52%
7	TAGRISSO	0,9%	56%	56%
8	INGAVIRIN	0,8%	484%	433%
9	CORONIM	0,8%	-5%	-7%
10	NILOTIN	0,8%	126%	126%
11	IMMUTIN	0,8%	-18%	18%
12	PHYSIOTENS	0,7%	102%	143%
13	ELAPRASE	0,7%	-59%	-60%
14	XAVOBAN	0,7%		
15	VIFERON	0,7%	145%	116%



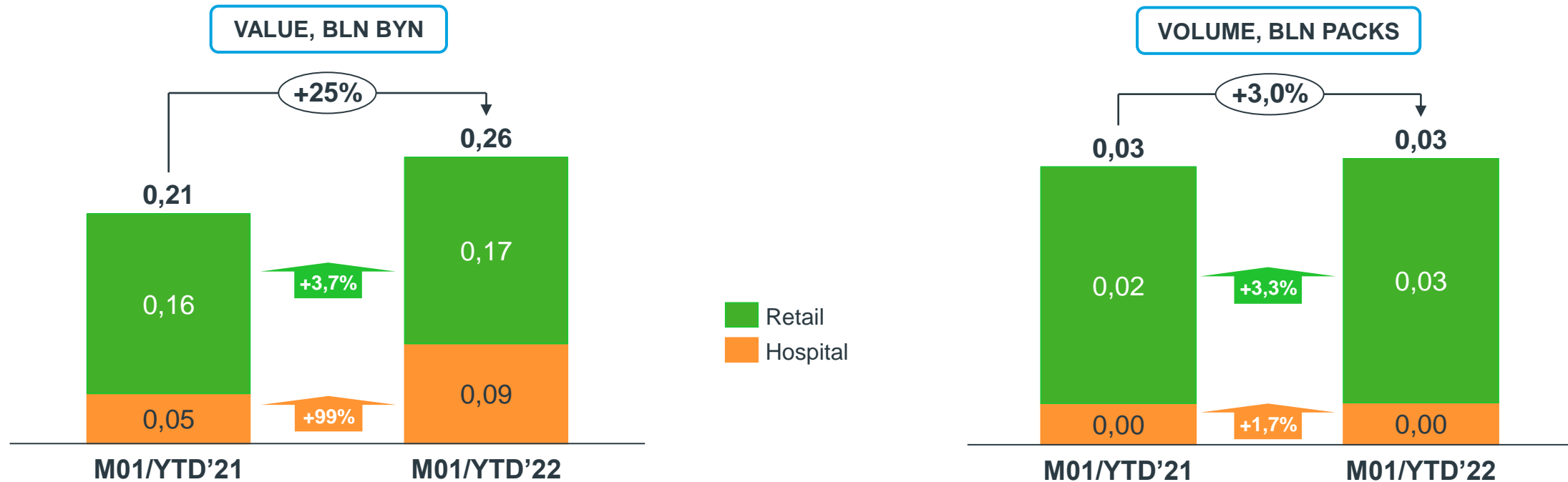
10,4%



INFLATION

Belarus pharma market growth in Jan 2022

Market grew by 25% in value and 3% in volume

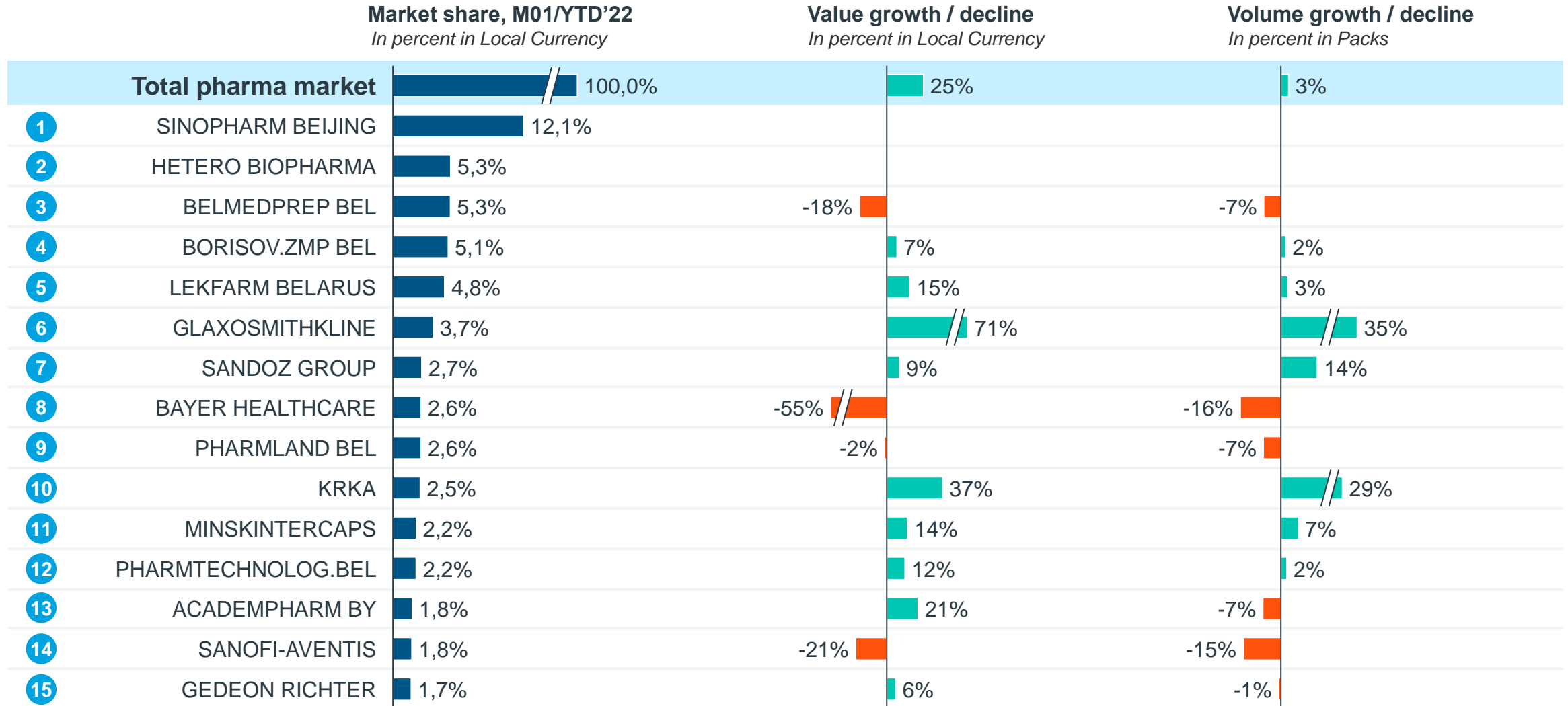


Indicator	BYN	USD	EUR	PACKS
Value M01/YTD'22, Bln.	0,26	0,10	0,09	0,03
Growth M01/YTD'22, %	▲ 25%	▲ 24%	▲ 34%	▲ 3,0%

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

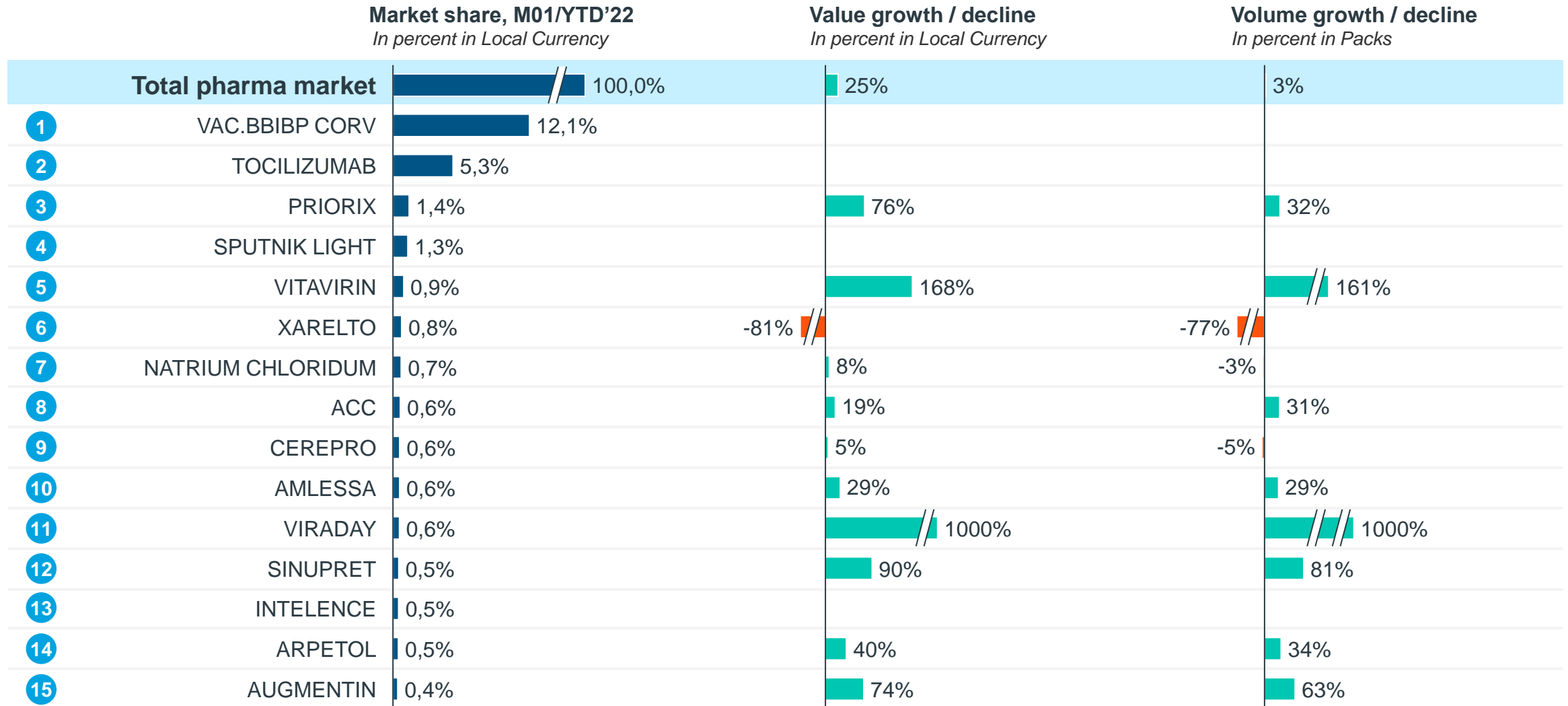


TOP-15 corporations on Belarus market, Jan 2022





TOP-15 brands on Belarus market, Jan 2022





9,8%



INFLATION

Uzbekistan pharma market growth in Jan 2022

Market grew by 15% in value and 24% in volume



Indicator	UZS	USD	EUR	PACKS
Value M01/YTD'22, Bln.	1 673	0,15	0,14	0,10
Growth M01/YTD'22, %	▲ 15%	▲ 12%	▲ 20%	▲ 24%



TOP-15 corporations on Uzbekistan market, Jan 2022

		Market share, M01/YTD'22 <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%	15%	24%
1	SERUM INSTIT.IND	4,2%	232%	-11%
2	NOVARTIS	3,8%	102%	60%
3	KRKA	2,9%	-7%	-8%
4	FARMAK KIEV	2,7%	43%	6%
5	SANOFI-AVENTIS	2,3%	10%	3%
6	WORLD MEDICINE	2,1%	50%	50%
7	MENARINI	2,1%	21%	20%
8	GM PHARMACEUTICALS	1,9%	48%	48%
9	BINNOPHARM GROUP	1,9%	60%	43%
10	GEDEON RICHTER	1,9%	89%	80%
11	ZHURABEK LAB	1,8%	79%	99%
12	STADA	1,6%	12%	-10%
13	YURIA-FARM UKR	1,5%	59%	66%
14	ABBOTT	1,5%	62%	61%
15	RADIKS NPP	1,4%	1000%	1000%

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 2022

		Market share, M01/YTD'22 <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%	15%	24%
1	VACC.PNEUMOC.C.10V	4,2%	231%	-11%
2	ACC	1,2%	63%	58%
3	VIFERON	0,8%	76%	102%
4	THERAFLU	0,8%	-48%	-46%
5	NATRIUM CHLORIDUM	0,8%	188%	99%
6	CEFTRIAZONE-AKOS	0,8%	145%	144%
7	ACTOVEGIN	0,7%	-10%	-8%
8	CEFTRIAZONE	0,7%	89%	137%
9	IROVIR-S	0,7%	199%	168%
10	AZIMAC	0,6%	50%	47%
11	TIVORTIN	0,6%	17%	13%
12	INSTI	0,6%	236%	212%
13	QUPEN	0,6%	-32%	-30%
14	SEPTOLETE	0,6%	42%	35%
15	VELSOF	0,6%	1000%	1000%



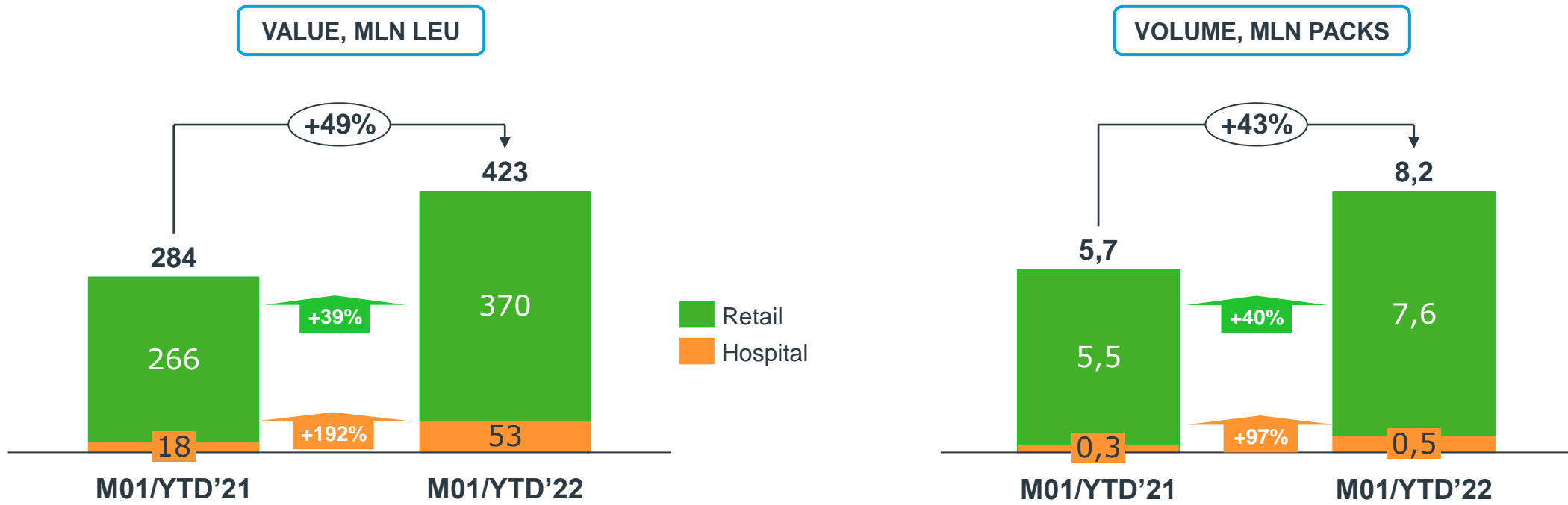
16,6%



INFLATION

Moldova pharma market growth in Jan 2022

Market grew by 49% in value and 43% in volume



Indicator	LEU	USD	EUR	PACKS
Value M01/YTD'22, Mln.	423	23,6	20,8	8,2
Growth M01/YTD'22, %	▲ 49%	▲ 43%	▲ 54%	▲ 43%

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



TOP-15 corporations on Moldova market, Jan 2022

		Market share, M01/YTD'22 <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%	49%	43%
1	BALKAN PHARM.SRL	6,3%	47%	92%
2	KRKA	5,8%	35%	30%
3	GEDEON RICHTER	4,6%	28%	22%
4	MENARINI	4,1%	5%	10%
5	GLAXOSMITHKLINE	4,1%	94%	104%
6	LAURUS LABS LIM.	3,3%		
7	NOBEL ILAC SAN TUR	2,8%	97%	88%
8	WORLD MEDICINE	2,4%	13%	15%
9	SANOFI-AVENTIS	2,3%	9%	-4%
10	BILIM ILAC SANAYI	2,3%	113%	109%
11	RECKITT BENCKISER	2,1%	296%	247%
12	ROCHE	1,8%	157%	151%
13	BAYER HEALTHCARE	1,8%	36%	33%
14	GRINDEX	1,7%	33%	41%
15	TAKEDA	1,6%	16%	31%



TOP-15 brands on Moldova market, Jan 2022

		Market share, M01/YTD'22 <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%	49%	43%
1	TENOFOVIR DISOP.FU	3,3%		
2	NUROFEN	1,3%	267%	224%
3	THERAFLU	1,3%	277	289%
4	ARBIVIR-ZDOROVYE	1,2%	110%	106%
5	ACTEMRA	1,1%	207%	368%
6	GROPRINOSIN	1,0%	204%	168%
7	XARELTO	0,8%	76%	247%
8	STREPSILS	0,7%	361%	320%
9	TYLOL	0,7%	280%	264%
10	KAGOCEL	0,7%	135%	100%
11	CARDIOMAGNYL	0,6%	88%	72%
12	SIMPONI	0,6%		
13	AUGMENTIN	0,6%	166%	169%
14	FORCEF	0,6%	119%	112%
15	VIFERON	0,6%	157%	140%

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