

Facts from IQVIA

M08 2021



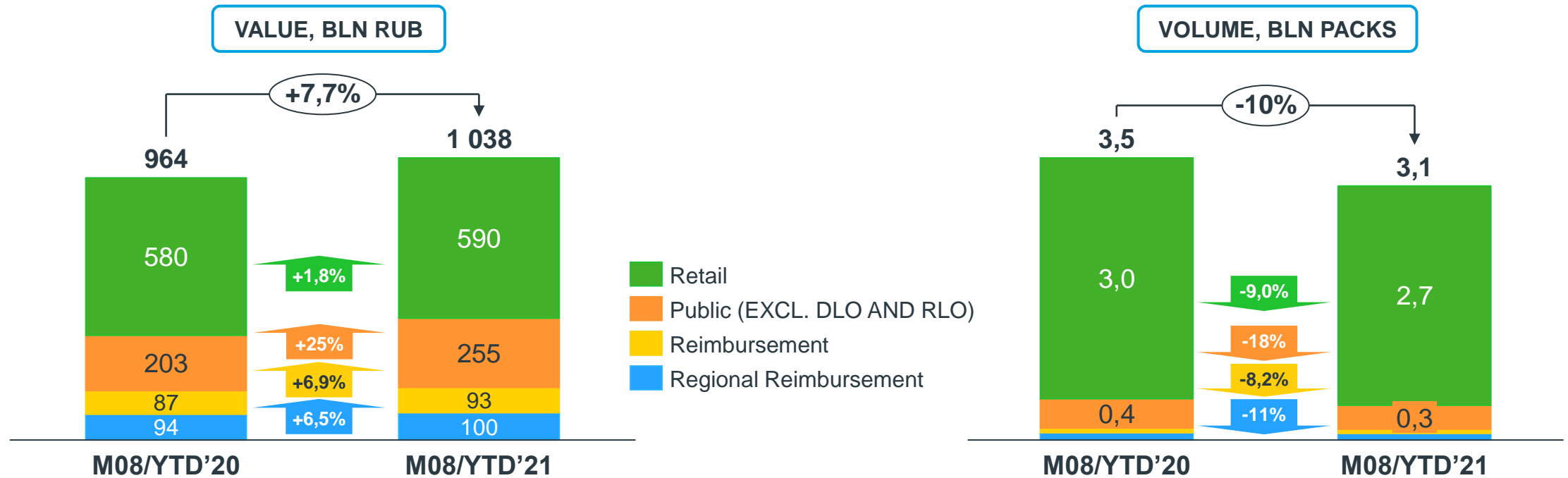
6,7%



INFLATION

Russian pharma market growth in January-August 2021

Market grew by 7,7% in value and decreased by 10% in volume



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

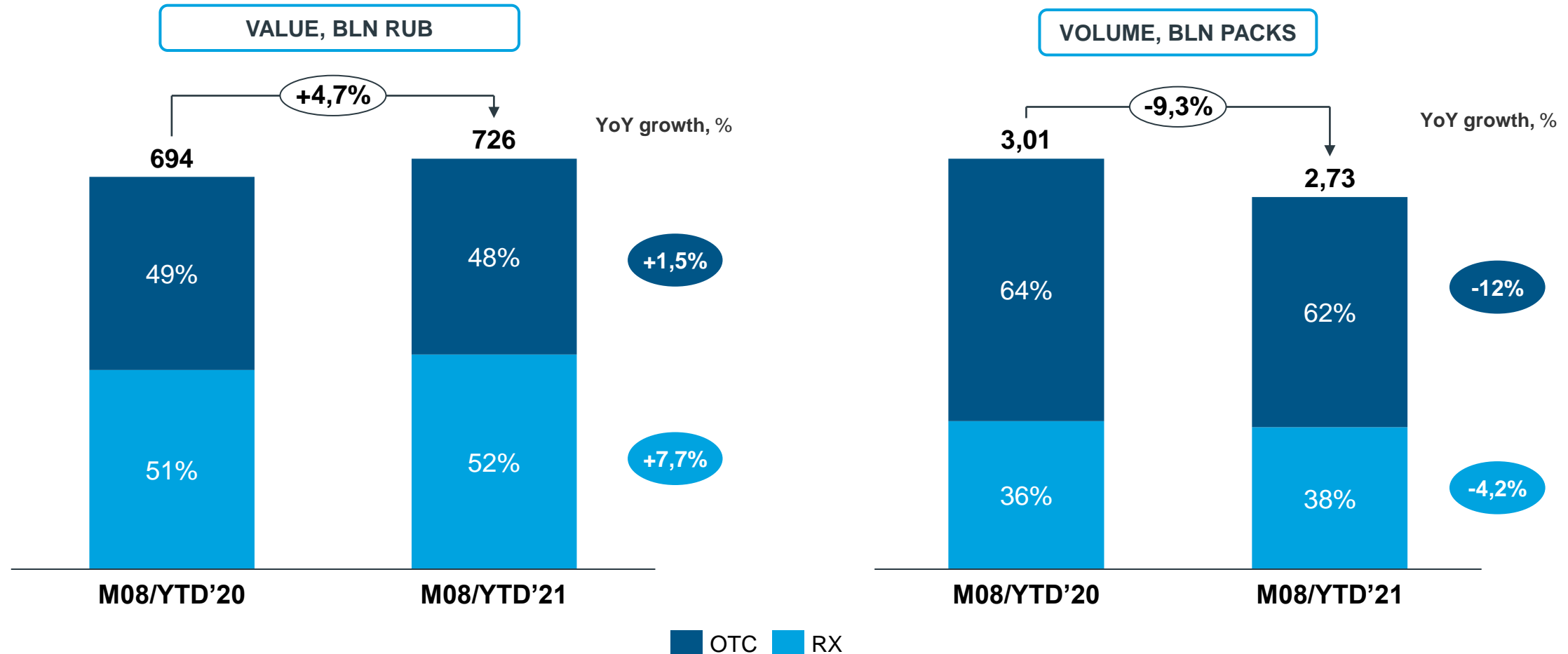
Indicator	RUB	USD	EUR	PACKS
Value M08/YTD'21, Bln.	1 038	14,0	11,7	3,1
Growth M08/YTD'21, %	▲ 7,7%	▲ 1,8%	▼ -5,2%	▼ -10%

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



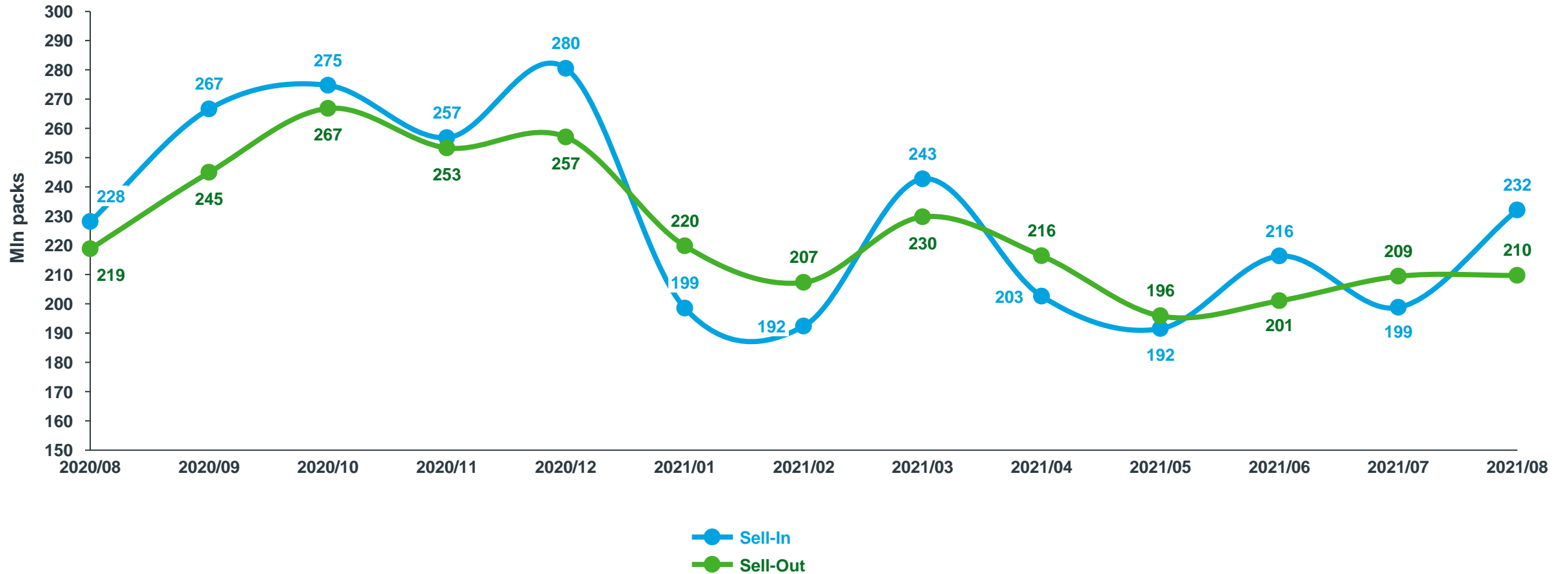
Russian pharma market increase in January-August 2021

Retail Sell-Out: Market grew by 4,7% in value and dropped by 9,3% in volume



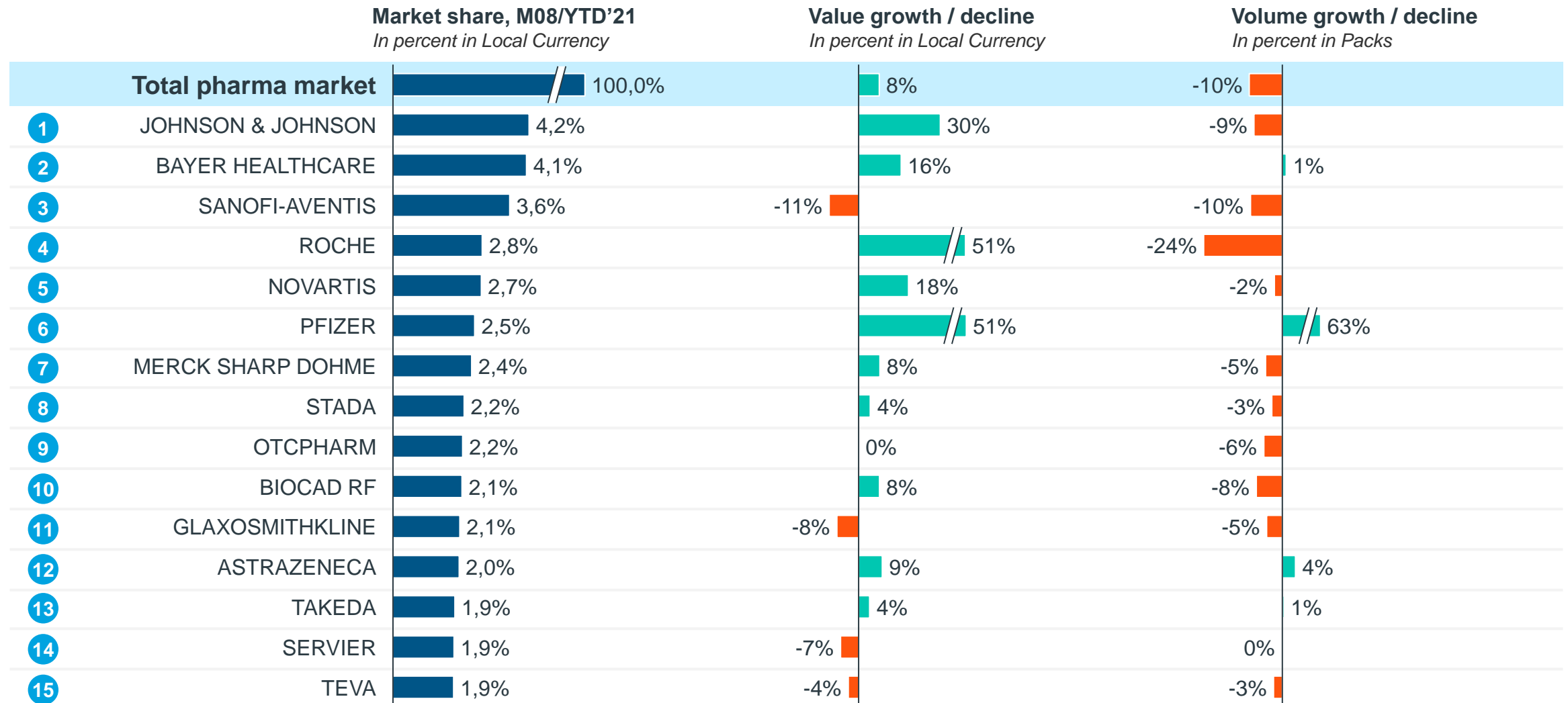


Sell-In vs Sell-Out, OTC registered drugs



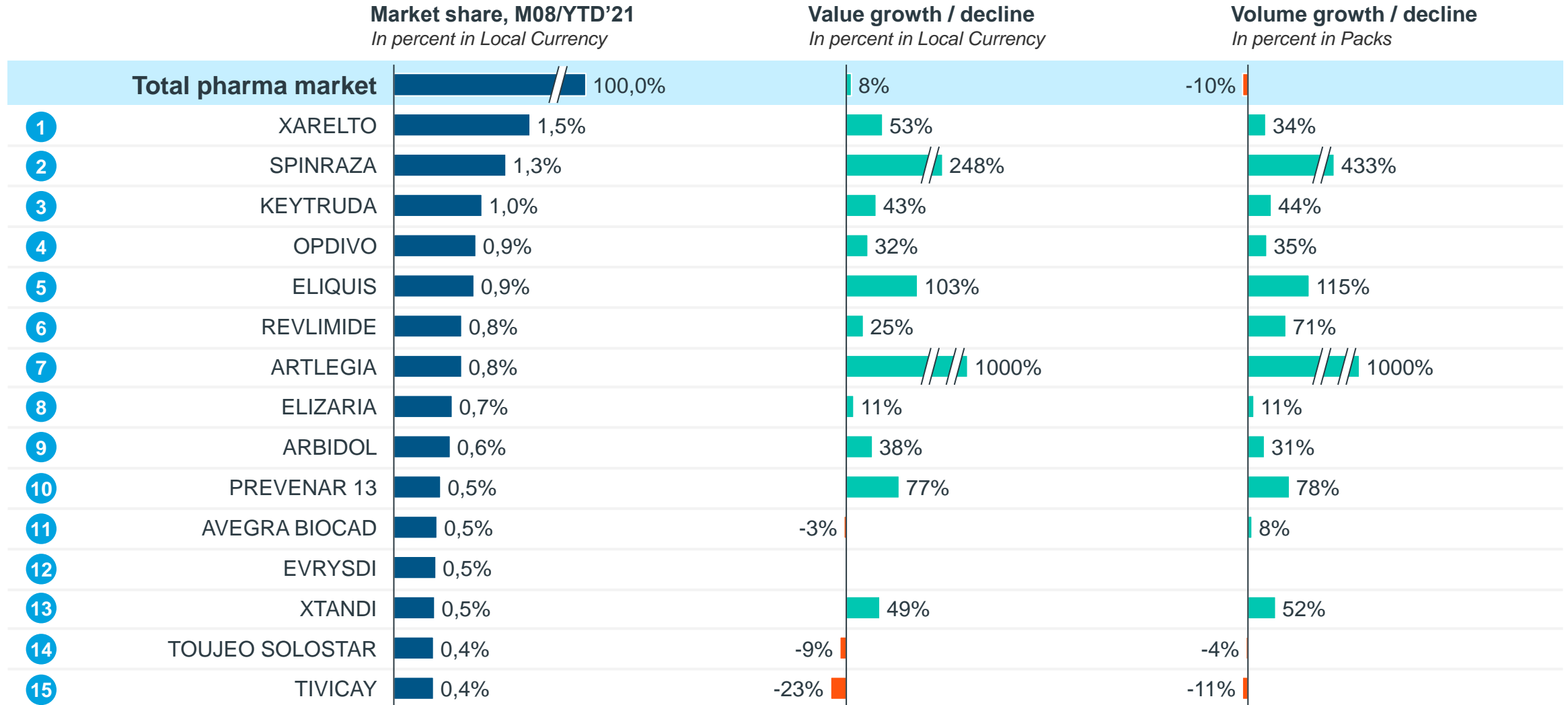


TOP-15 corporations on Russian market, January-August 2021



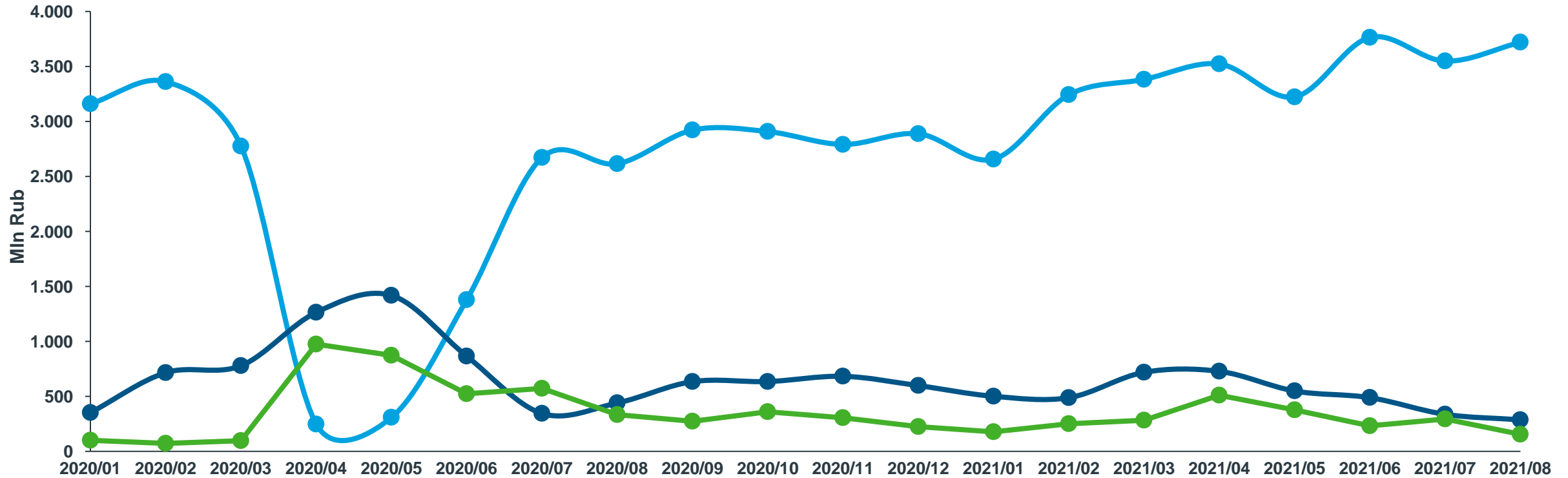


TOP-15 brands on Russian market, January-August 2021



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-August 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

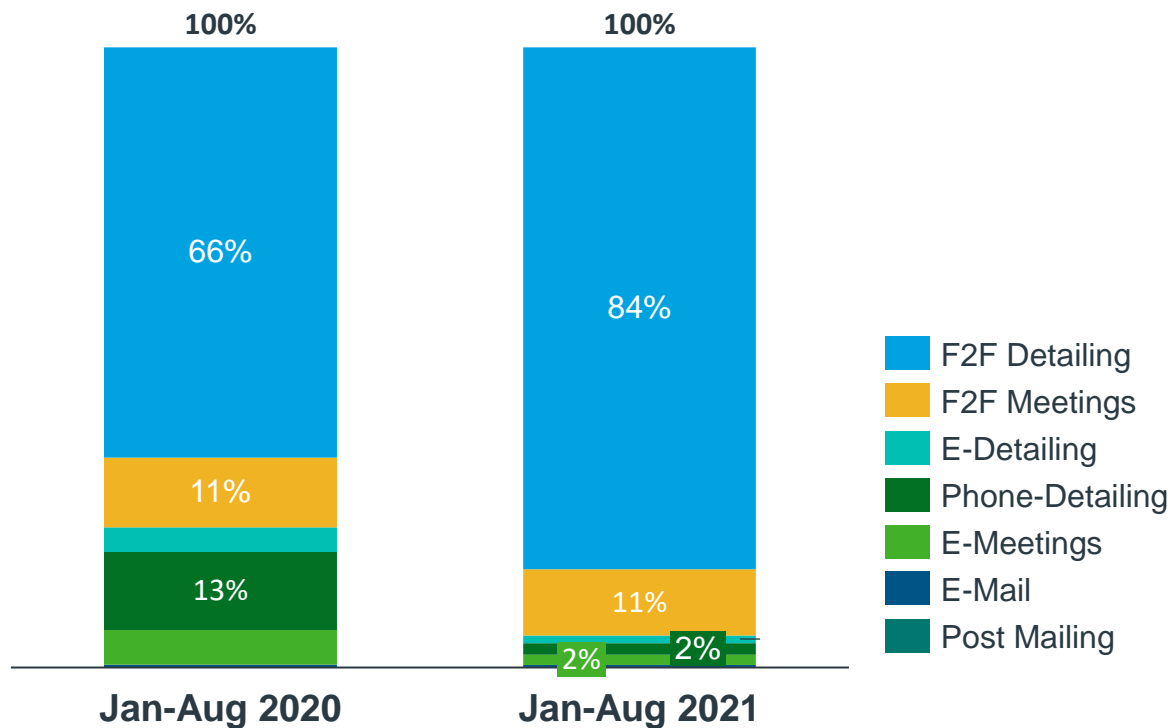
Source: IQVIA Russia, Channel Dynamics promo évaluation; Specialties: Allergology/Pulmonology, Cardiology, Dermatology, Diabetes, E.N.T., Gastroenterology, GPs, Gynecology, Neurology, Oncology, Pediatric, Pharma, Psychotherapy, Urology.

● F2F Detailing
● Traditional others
● Digital

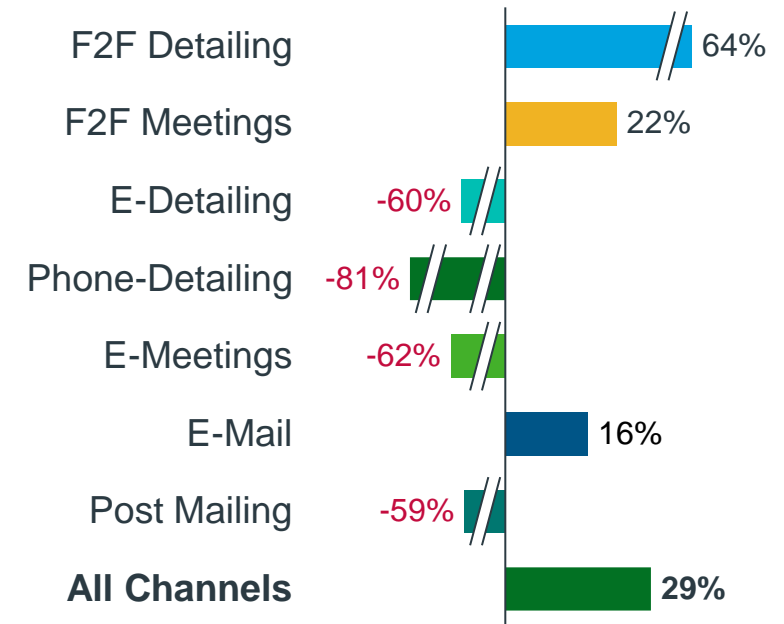
Total Market overall promotional value in Rub increased by 29%, Jan-Aug 2021 vs 2020



Promotional value in Rub share by channel



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

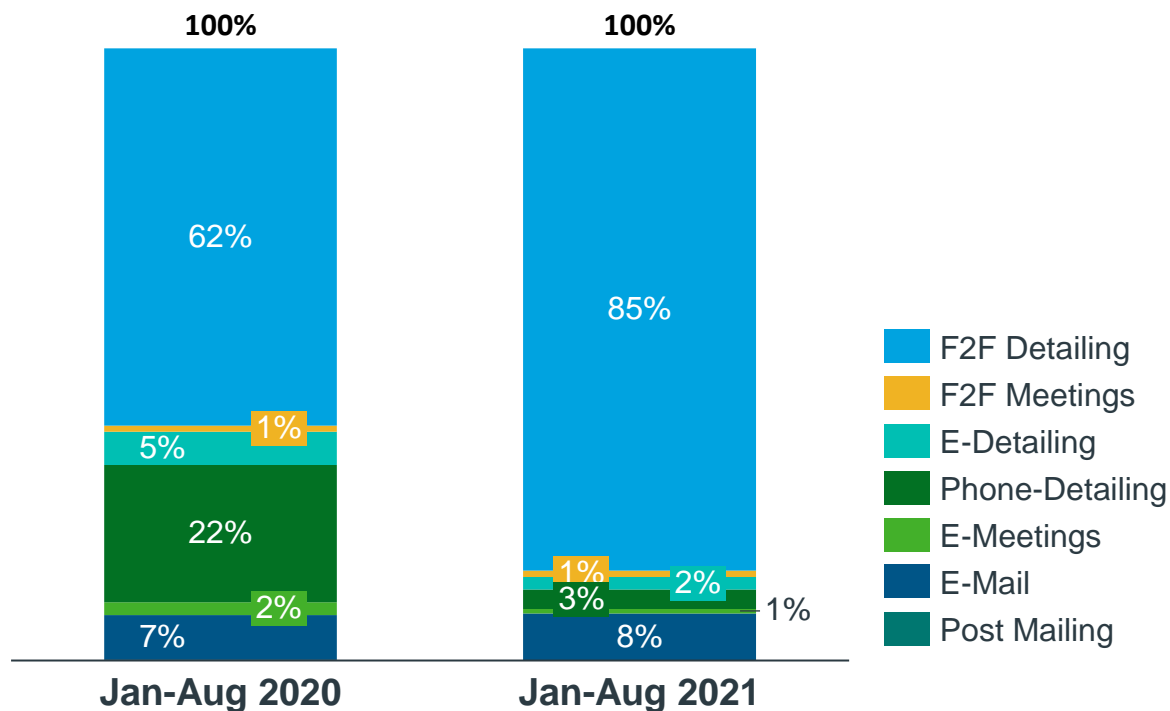
Value – a cost of each interaction projected on doctor’s universe

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.

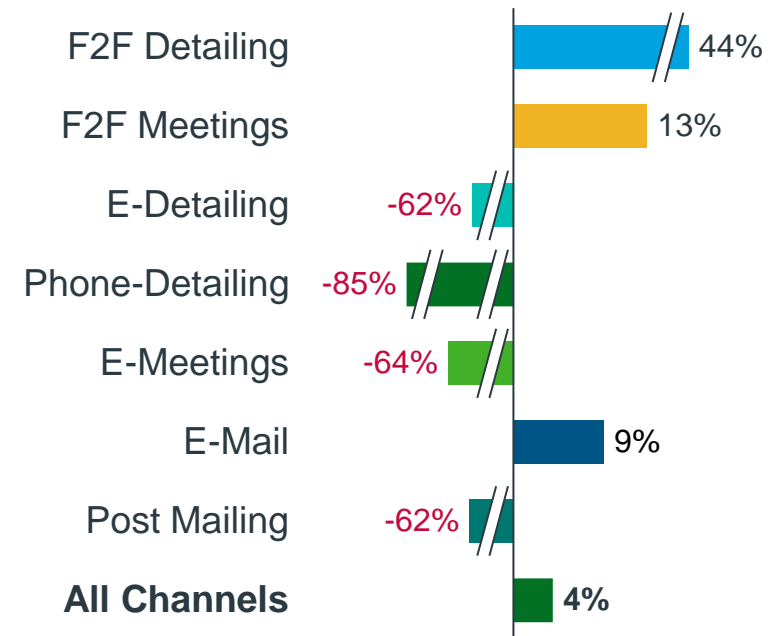
Total Market overall promotional volume (contacts) increased by 4%, Jan-Aug 2021 vs 2020



Promotional value in Rub share by channel



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



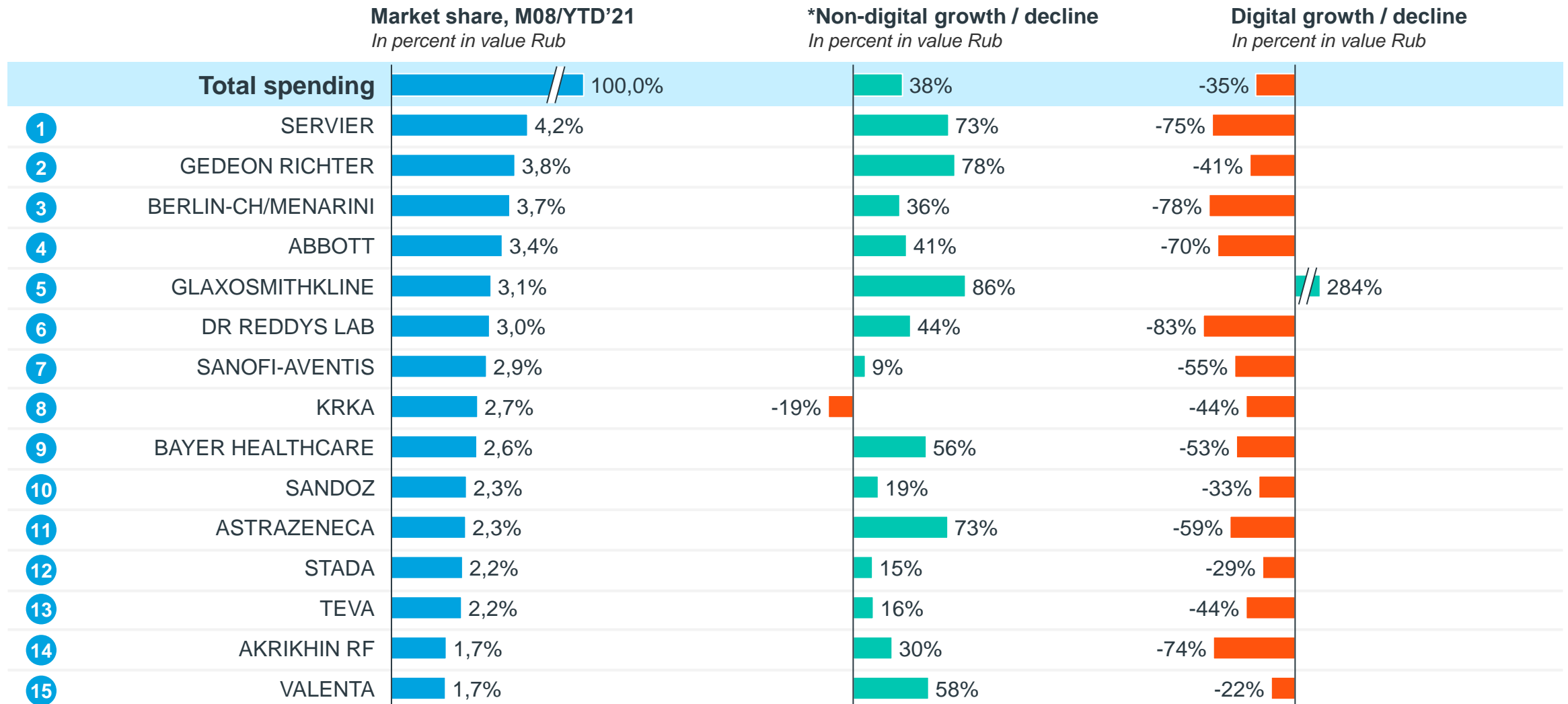
F2F Detailing – Reps visits. **Traditional others:** 1) F2F meetings – group meetings, round tables etc, 2) Phone Detailing – phone calls, 3) E-mail – communication via email. 4) Post Mailing – paper mails. **Digital:** 1) E-detailing – 1-1 calls visits using digitabl platforms 2) E-meetings – group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



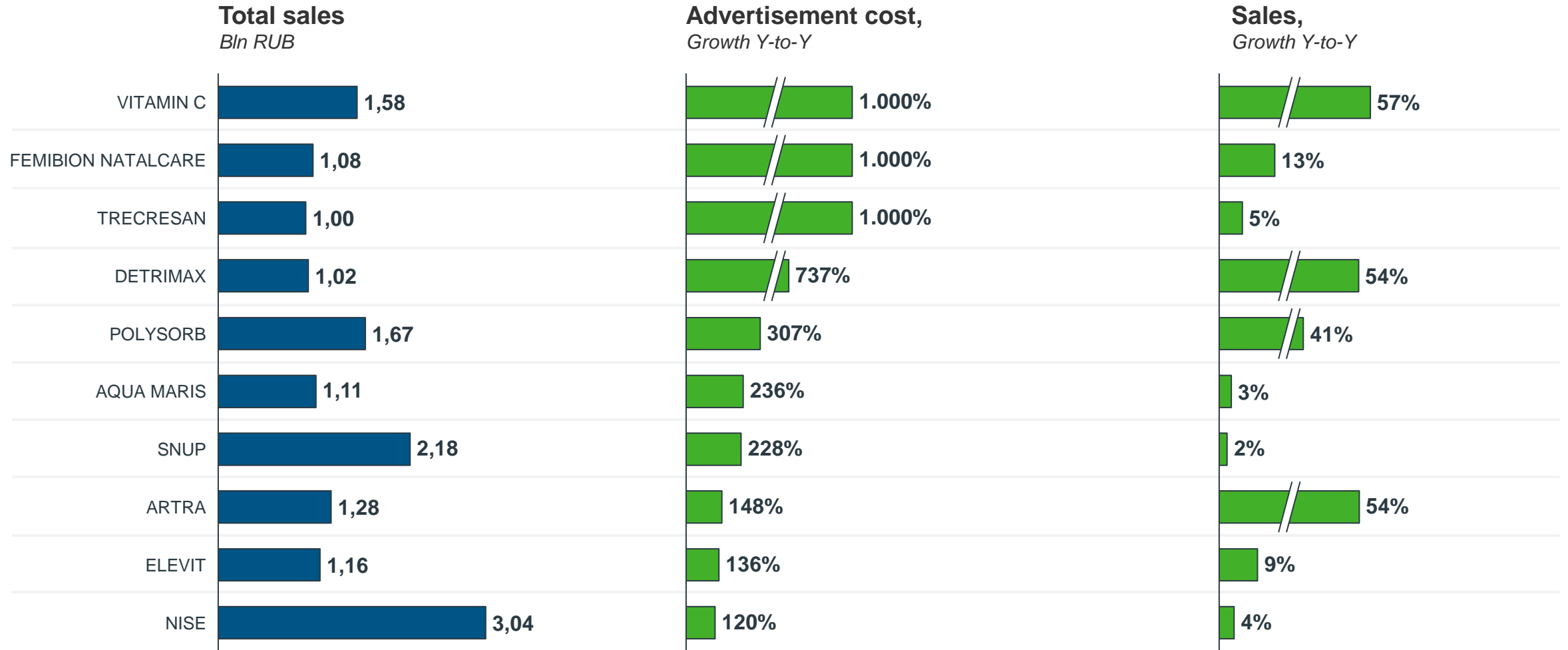
TOP-15 corporations on promotional value in Rub, Jan-Aug 2021



*Non-digital: F2F Detailing + Traditional others.

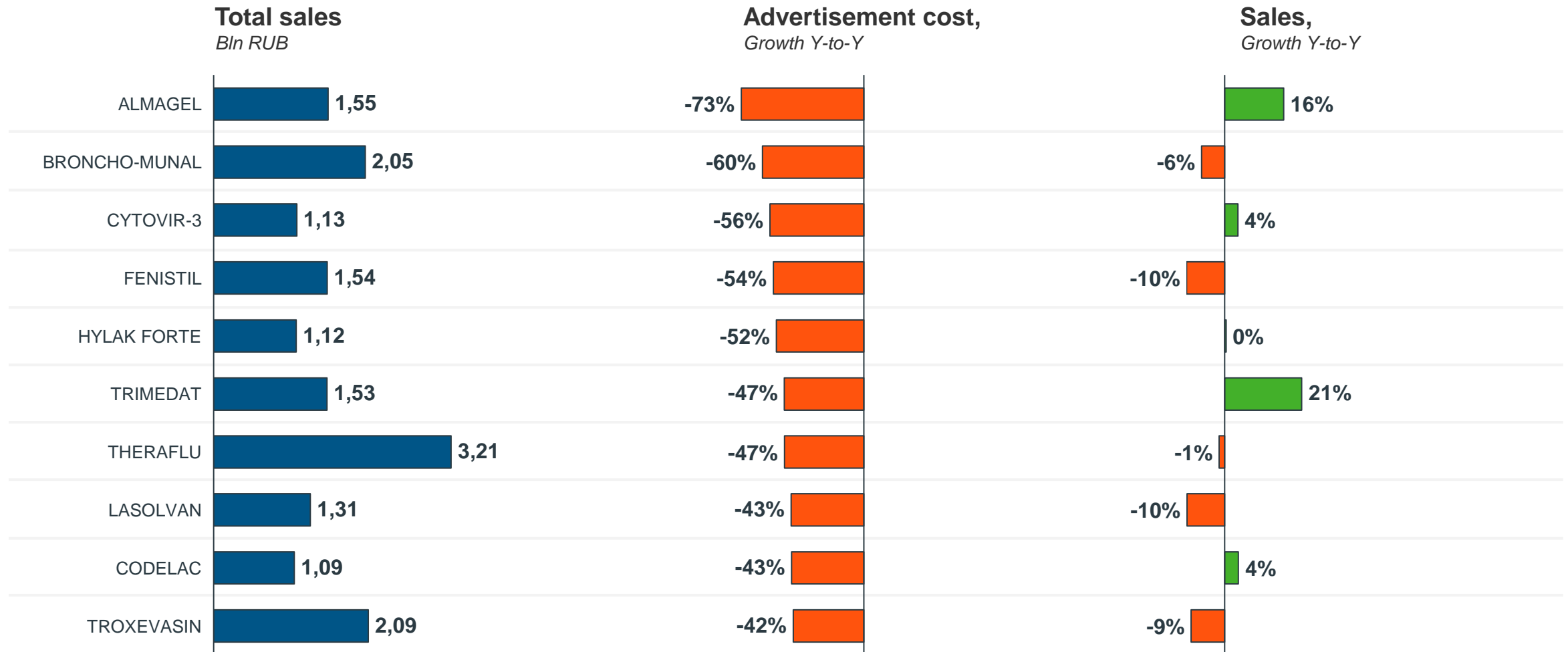
Source: IQVIA Russia, Channel Dynamics promo évaluation; Specialties: Allergology/Pulmonology, Cardiology, Dermatology, Diabetes, E.N.T., Gastroenterology, GPs, Gynecology, Neurology, Oncology, Pediatric, Pharma, Psychotherapy, Urology.

TOP-10 products by growth in advertisement investments in January-August 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

TOP-10 products by decline in advertisement investments in January-August 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



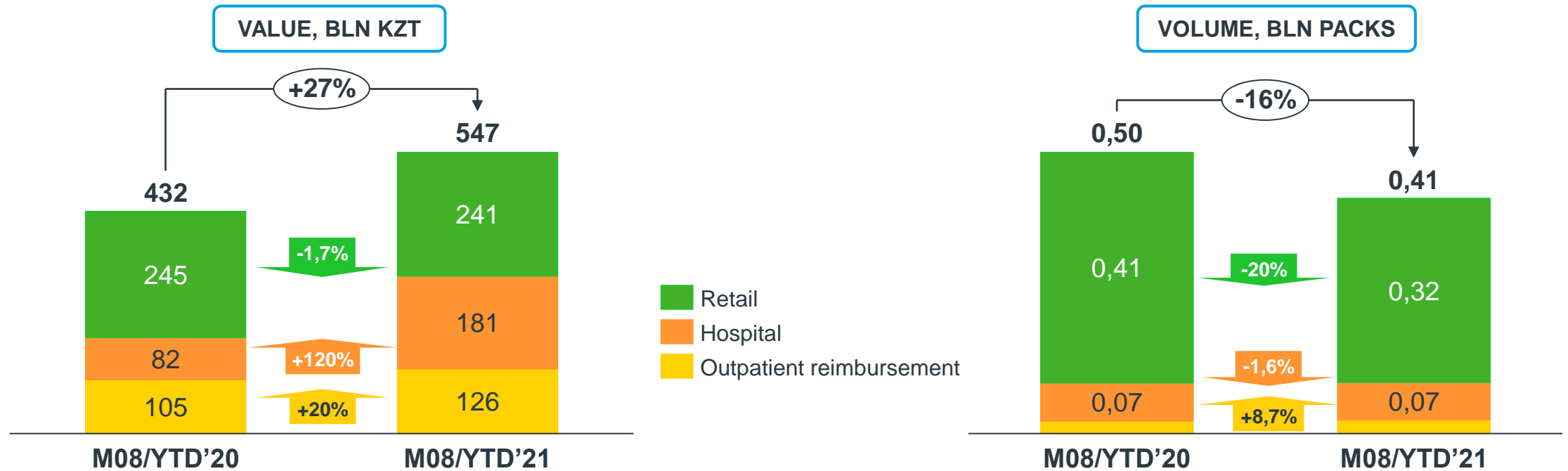
8,7%



INFLATION

Kazakhstan pharma market growth in January-August 2021

Market grew by 27% in value and decreased by 16% in volume

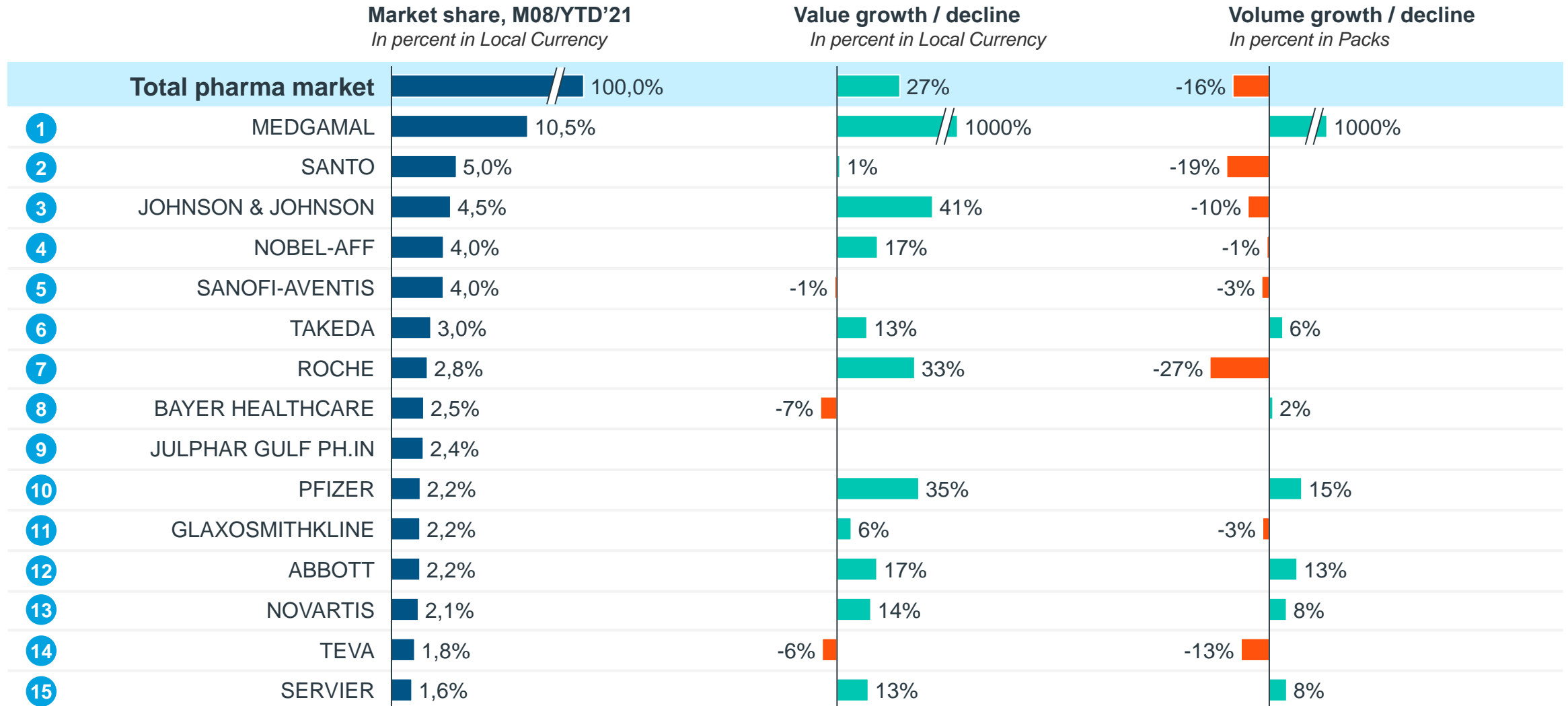


Indicator	KZT	USD	EUR	PACKS
Value M08/YTD'21, Bln.	547	1,29	1,08	0,41
Growth M08/YTD'21, %	▲ 27%	▲ 22%	▲ 13%	▼ -16%

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

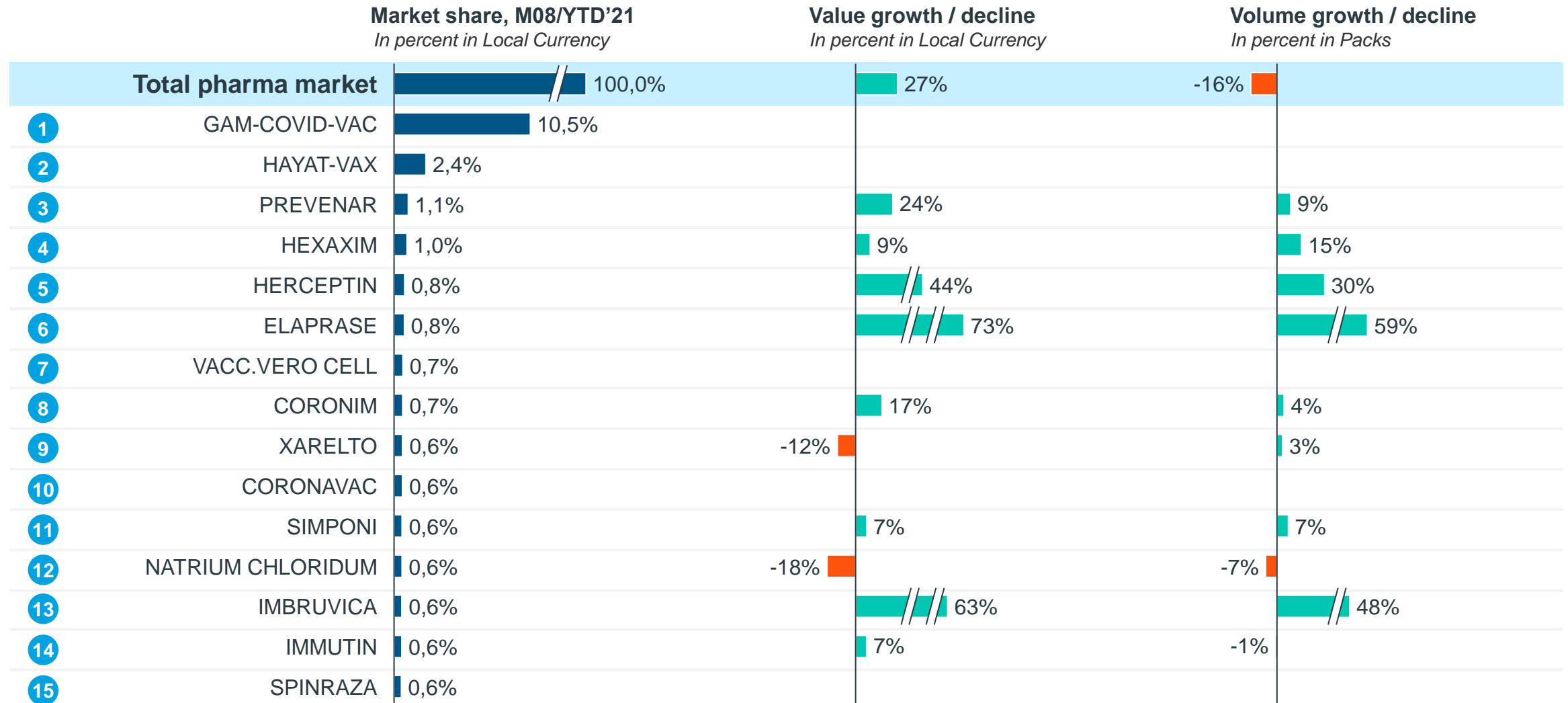


TOP-15 corporations on Kazakhstan market, January-August 2021





TOP-15 brands on Kazakhstan market, January-August 2021





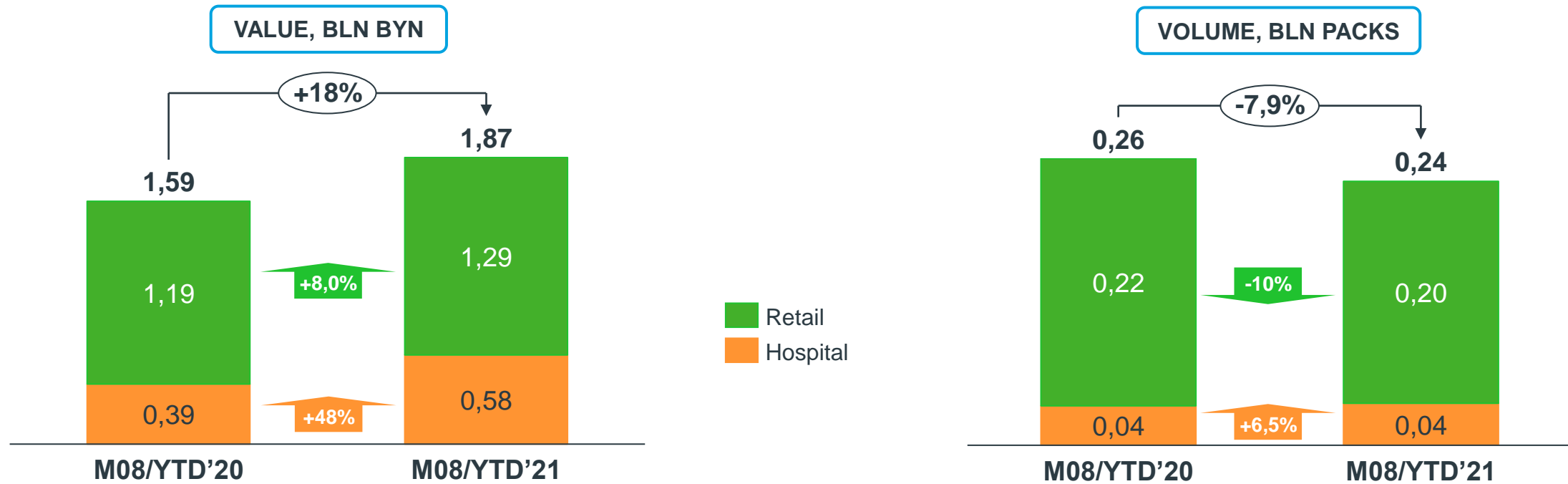
9,8%



INFLATION

Belarus pharma market growth in January-August 2021

Market grew by 18% in value and decreased by 7,9% in volume

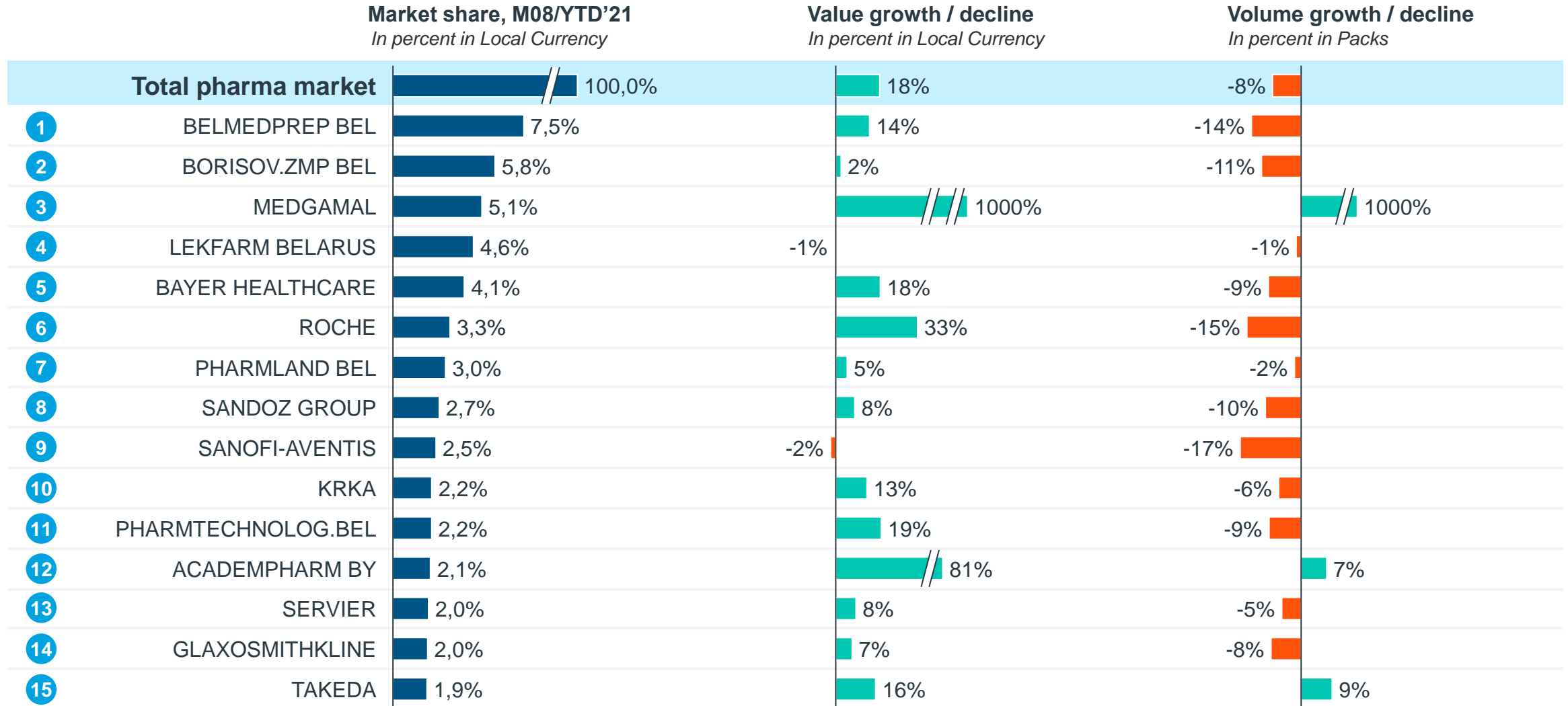


Indicator	BYN	USD	EUR	PACKS
Value M08/YTD'21, Bln.	1,87	0,73	0,61	0,24
Growth M08/YTD'21, %	▲ 18%	▲ 9,1%	▲ 1,5%	▼ -7,9%

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

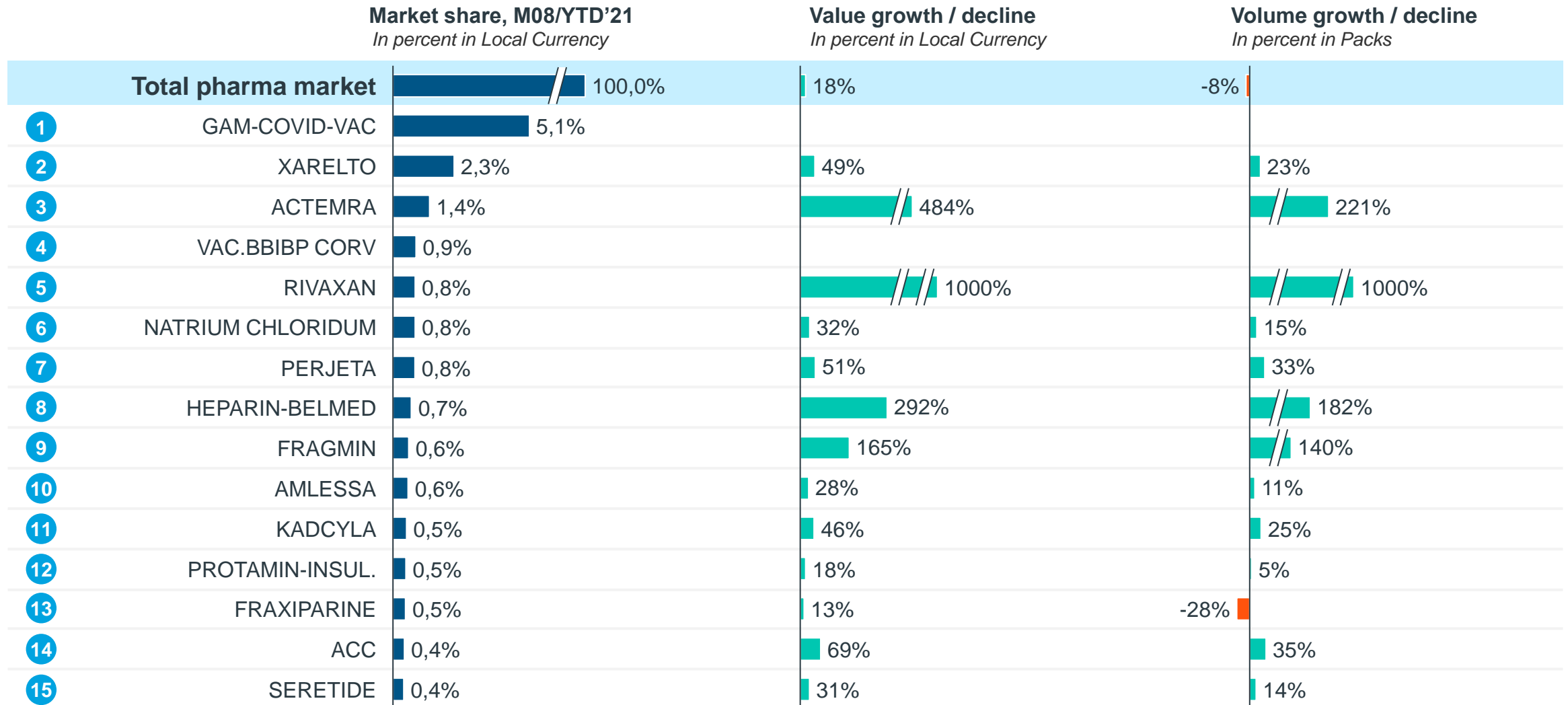


TOP-15 corporations on Belarus market, January-August 2021





TOP-15 brands on Belarus market, January-August 2021





11,1%



INFLATION

Uzbekistan pharma market growth in January-August 2021

Market grew by 68% in value and by 37% in volume



Indicator	UZS	USD	EUR	PACKS
Value M08/YTD'21, Bln.	11 159	1,06	0,88	0,59
Growth M08/YTD'21, %	▲ 68%	▲ 59%	▲ 48%	▲ 37%



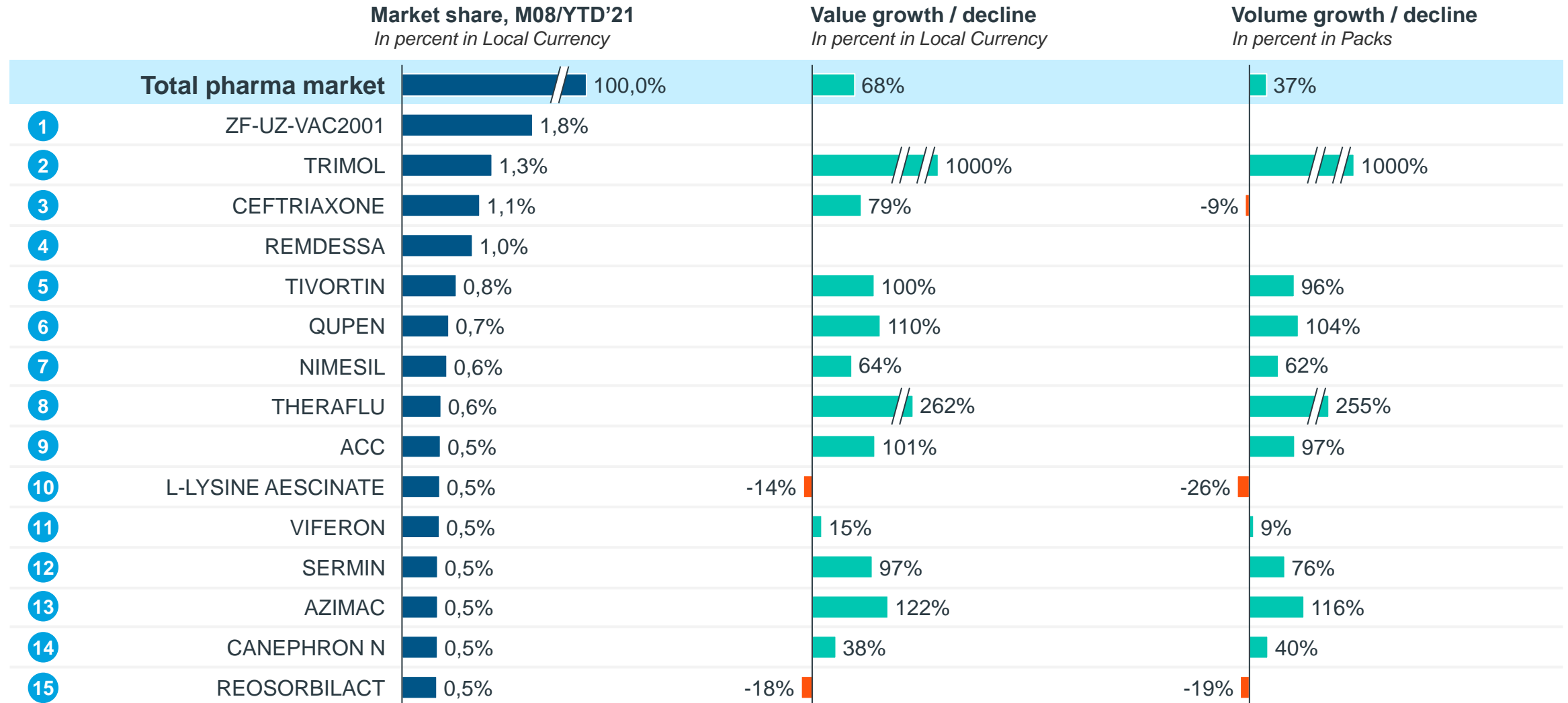
TOP-15 corporations on Uzbekistan market, January-August 2021

		Market share, M08/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%	68%	37%
1	KRKA	3,2%	62%	59%
2	MENARINI	2,7%	16%	0%
3	SANOFI-AVENTIS	2,7%	70%	61%
4	NOVARTIS	2,5%	40%	12%
5	FARMAK KIEV	2,3%	41%	14%
6	ZHURABEK LAB	2,3%	62%	-11%
7	WORLD MEDICINE	2,2%	130%	114%
8	GM PHARMACEUTICALS	2,0%	79%	71%
9	YURIA-FARM UKR	1,9%	44%	26%
10	ANHUI ZHIFEI LONG.	1,8%		
11	ABBOTT	1,7%	14%	9%
12	NIKA-PHARM	1,7%	75%	23%
13	NOBEL ILAC SAN TUR	1,6%	55%	24%
14	GEDEON RICHTER	1,6%	7%	4%
15	AJANTA PHARMA IND	1,5%	684%	652%

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, January-August 2021





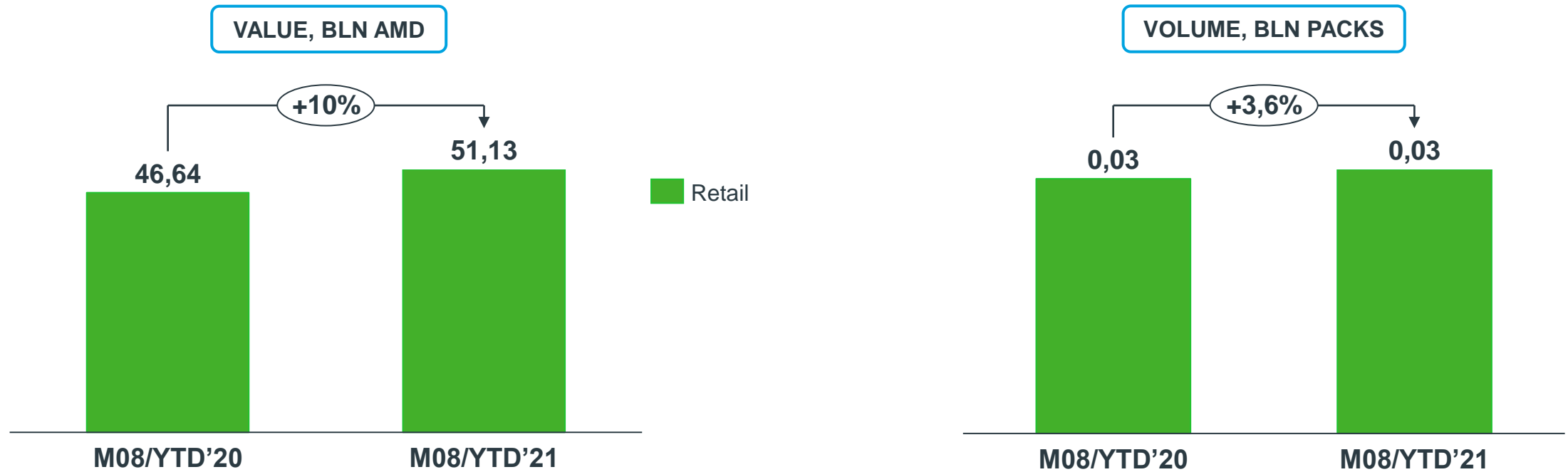
8,8%



INFLATION

Armenia pharma market growth in January-August 2021

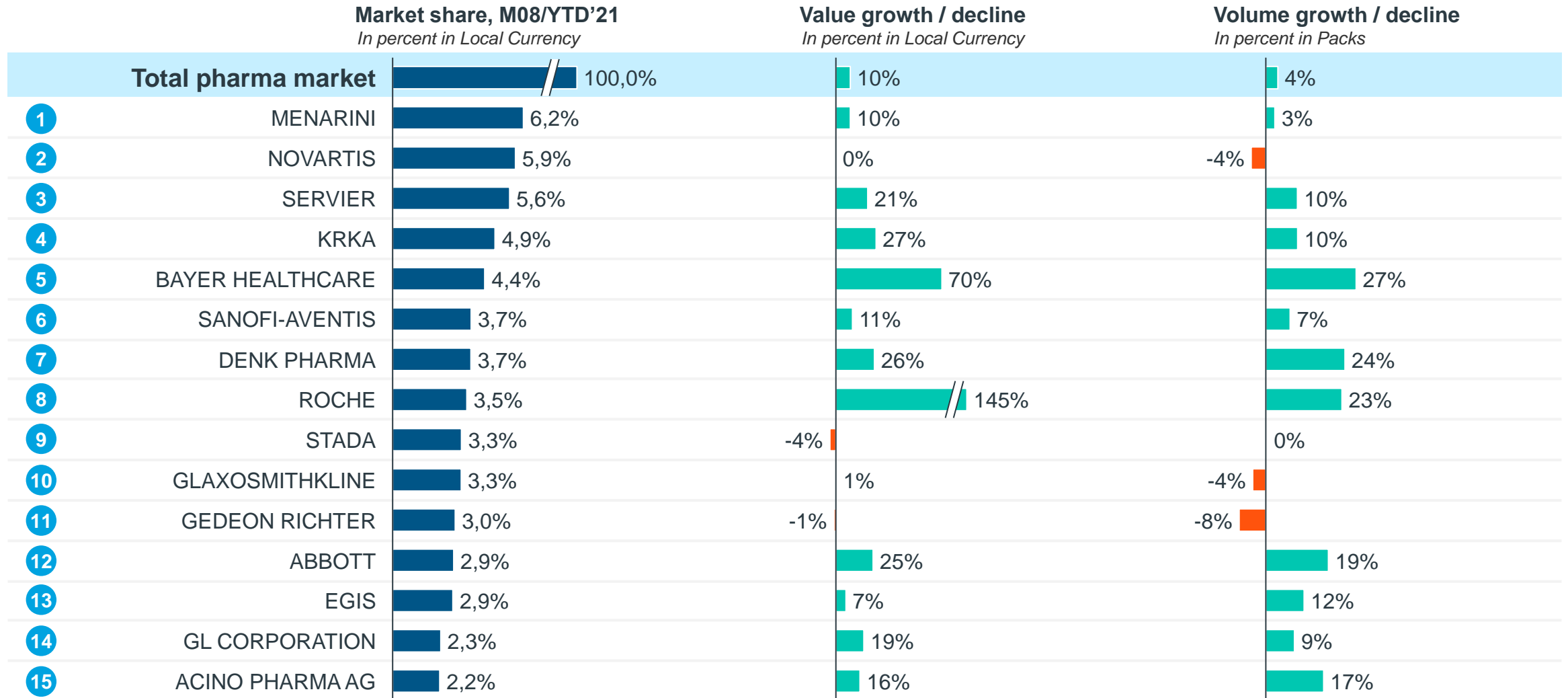
Market grew by 10% in value and by 3,6% in volume



Indicator	AMD	USD	EUR	PACKS
Value M08/YTD'21, Bln.	51,1	0,10	0,08	0,03
Growth M08/YTD'21, %	▲ 10%	▲ 3,2%	▼ -3,7%	▲ 3,6%

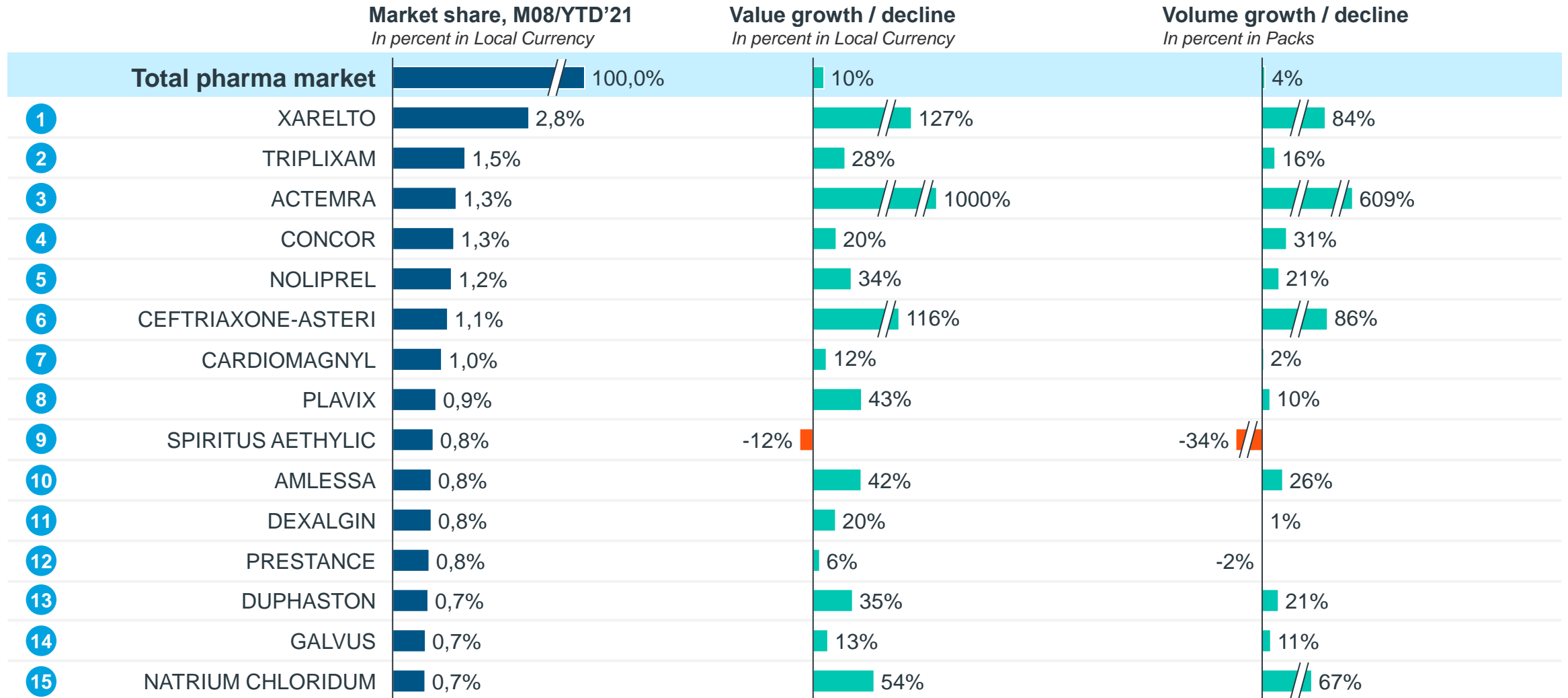


TOP-15 corporations on Armenia market, January-August 2021





TOP-15 brands on Armenia market, January-August 2021





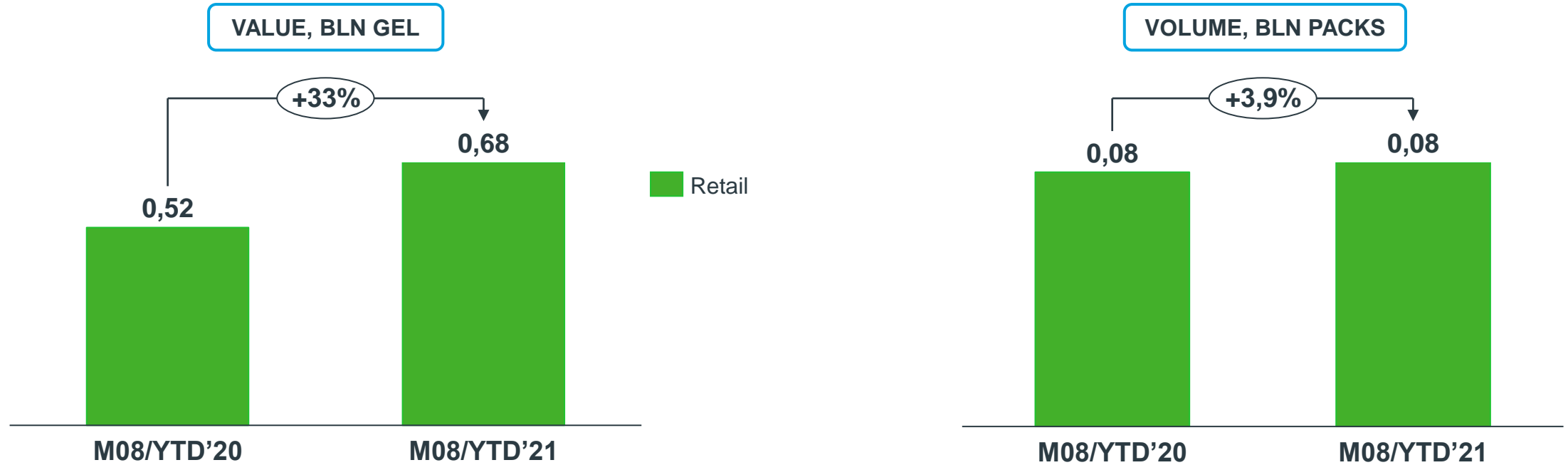
12,8%



INFLATION

Georgia pharma market growth in January-August 2021

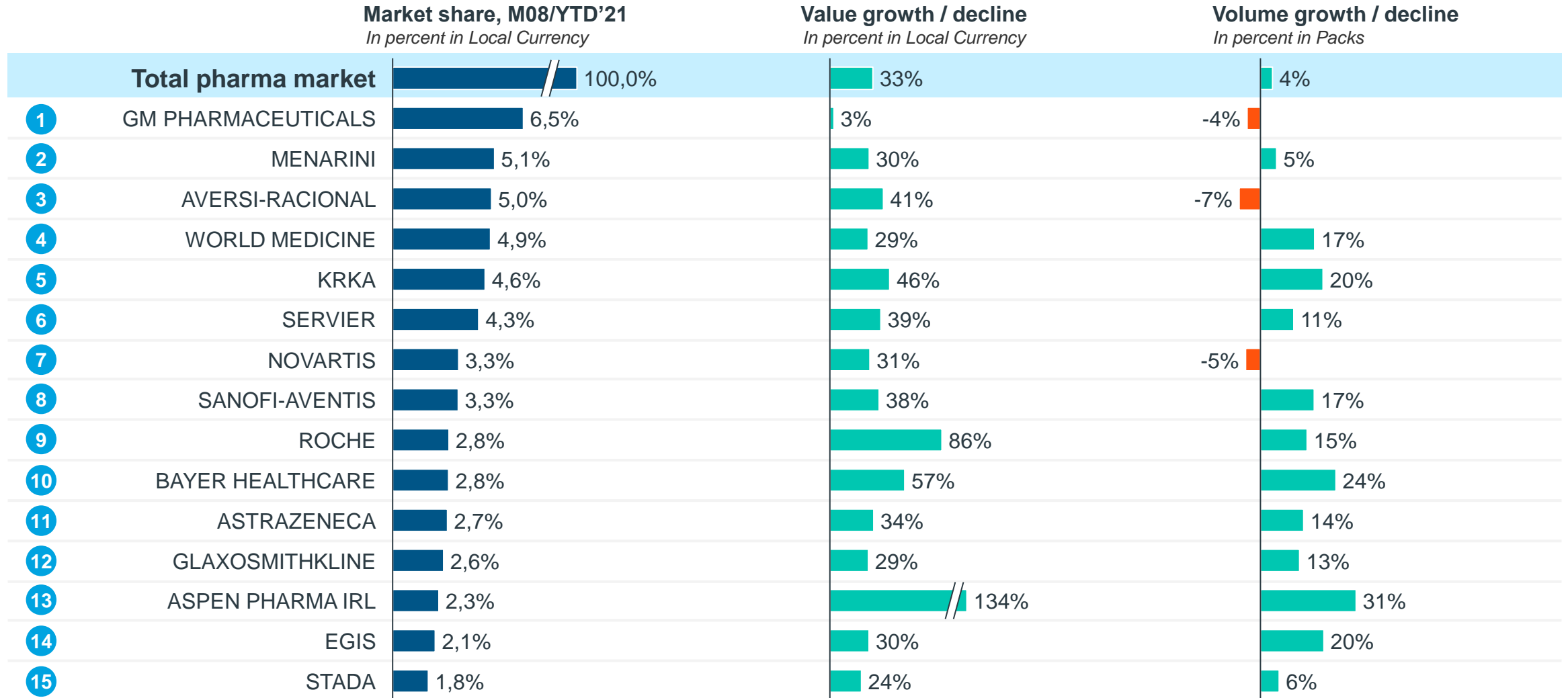
Market grew by 33% in value and by 3,9% in volume



Indicator	GEL	USD	EUR	PACKS
Value M08/YTD'21, Bln.	0,7	0,21	0,17	0,08
Growth M08/YTD'21, %	▲ 33%	▲ 23%	▲ 15%	▲ 3,9%

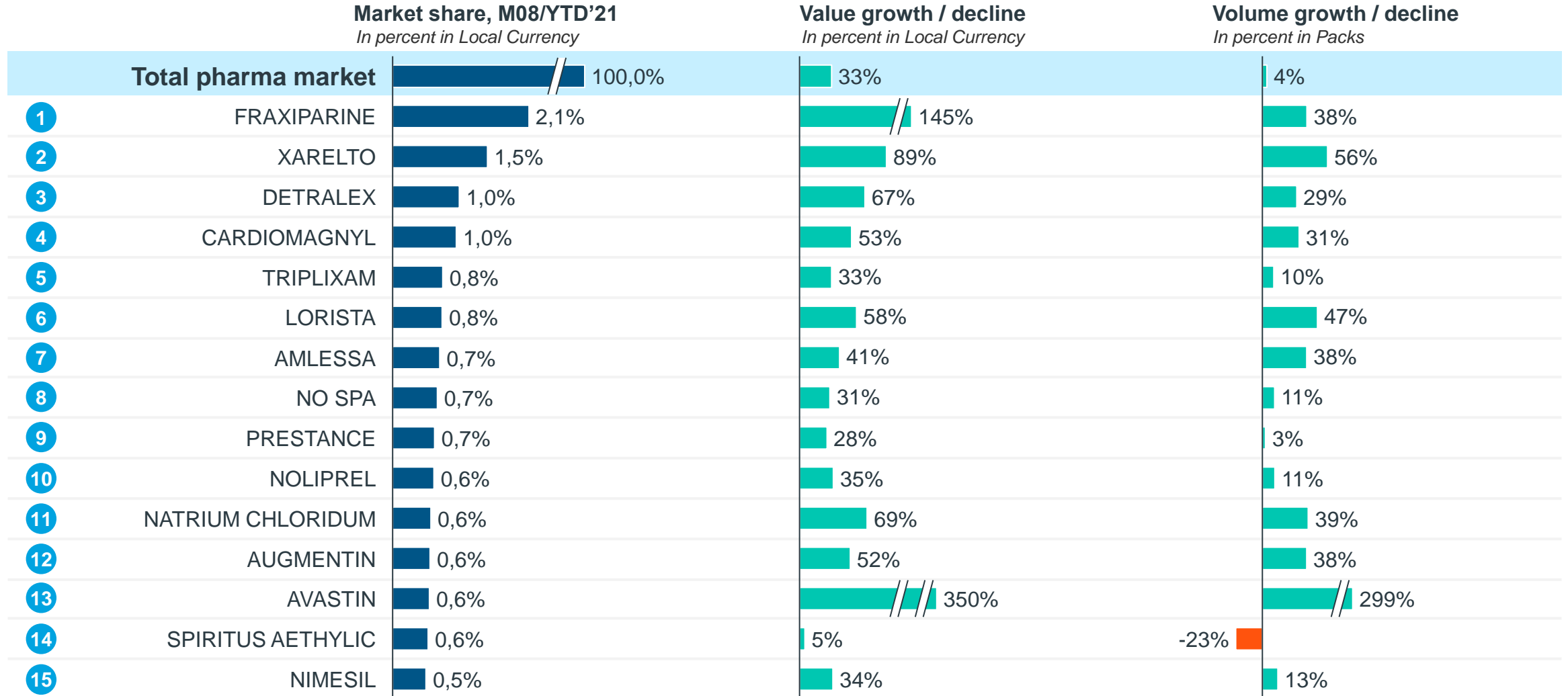


TOP-15 corporations on Georgia market, January-August 2021





TOP-15 brands on Georgia market, January-August 2021





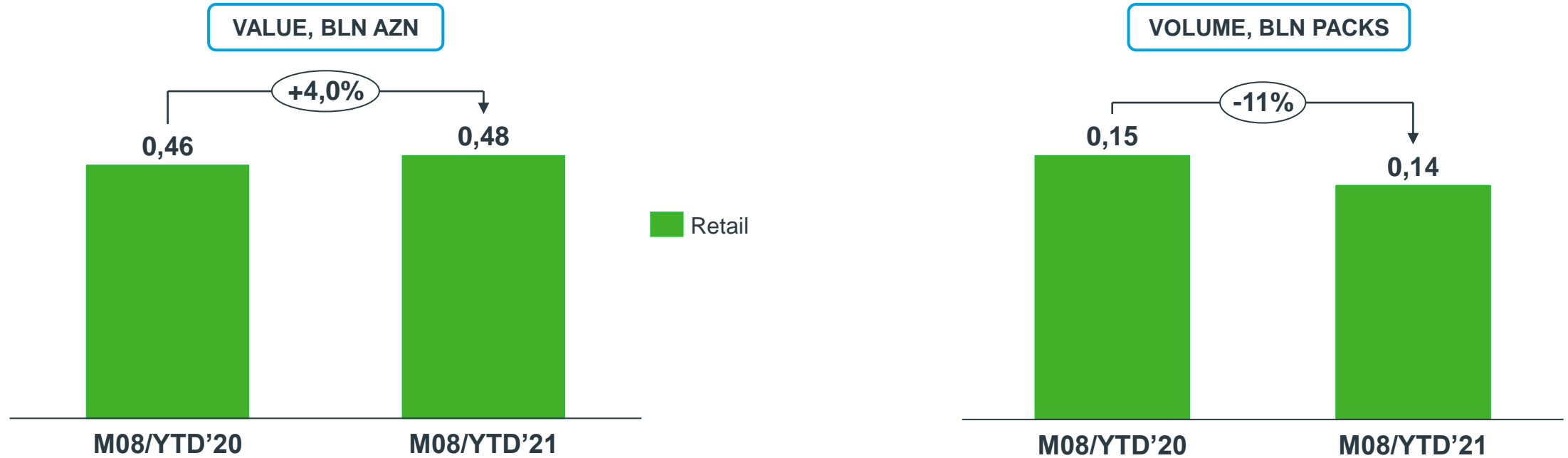
4,8%



INFLATION

Azerbaijan pharma market growth in January-August 2021

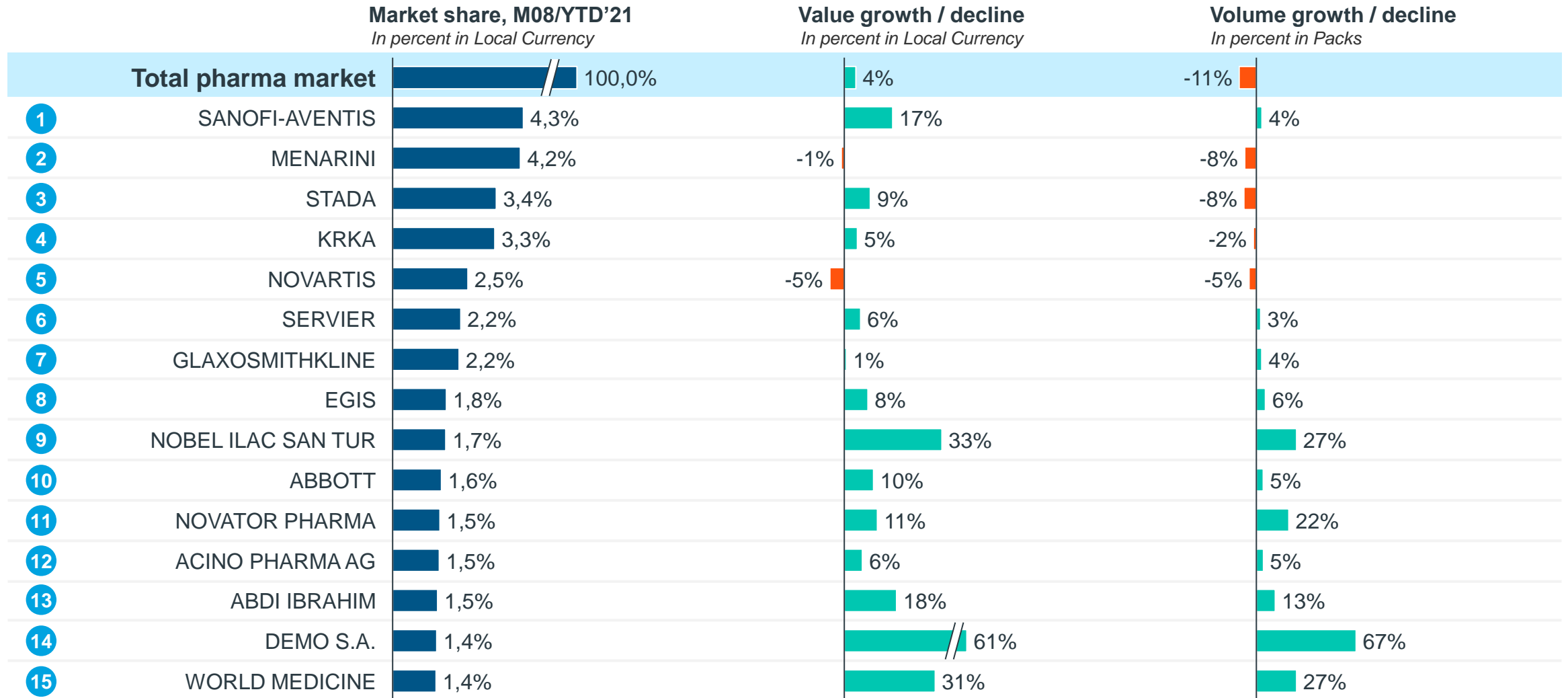
Market grew by 4,0% in value and decreased by 11% in volume



Indicator	AZN	USD	EUR	PACKS
Value M08/YTD'21, Bln.	0,48	0,28	0,24	0,14
Growth M08/YTD'21, %	▲ 4,0%	▲ 4,0%	▼ -3,0%	▼ -11%

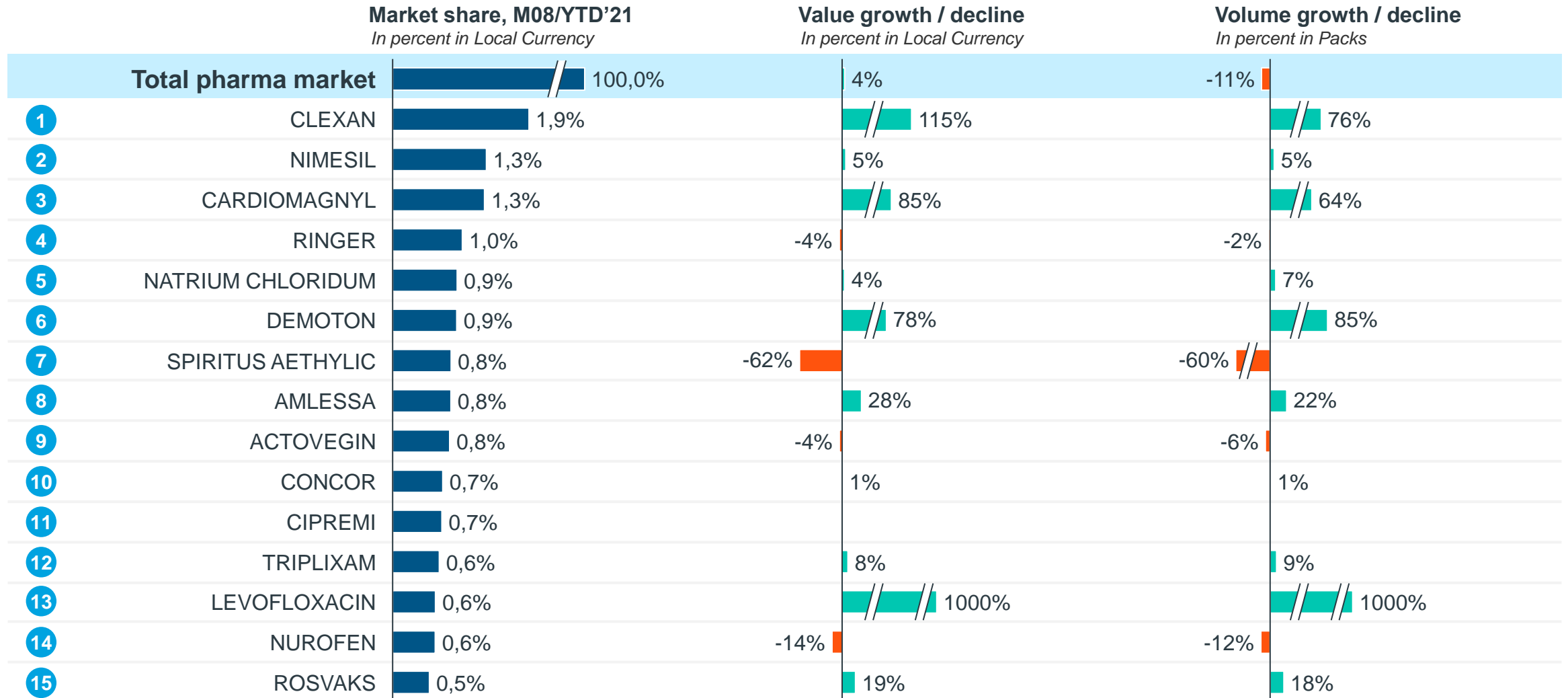


TOP-15 corporations on Azerbaijan market, January-August 2021





TOP-15 brands on Azerbaijan market, January-August 2021



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