

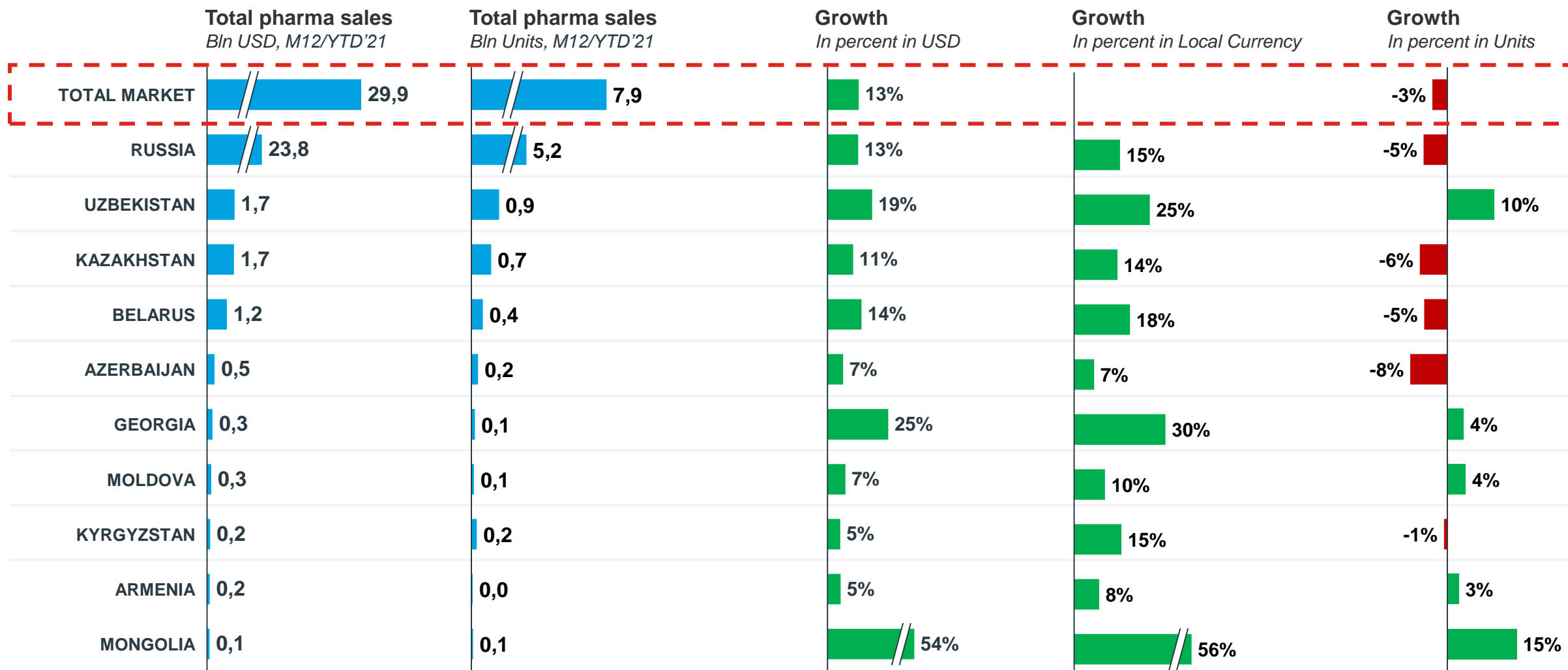


Facts from IQVIA

M12 2021

EAEU & CIS, Russia Countries ranking in Jan-Dec 2021, Total market, Value in Bln. USD and Units

Total Market grew by 13% in USD and declined by 3% in volume



Source: IQVIA databases. Retail and Non-Retail (excluding food supplements and diagnostic agents). Azerbaijan, Georgia and Armenia – retail only. TRD Prices



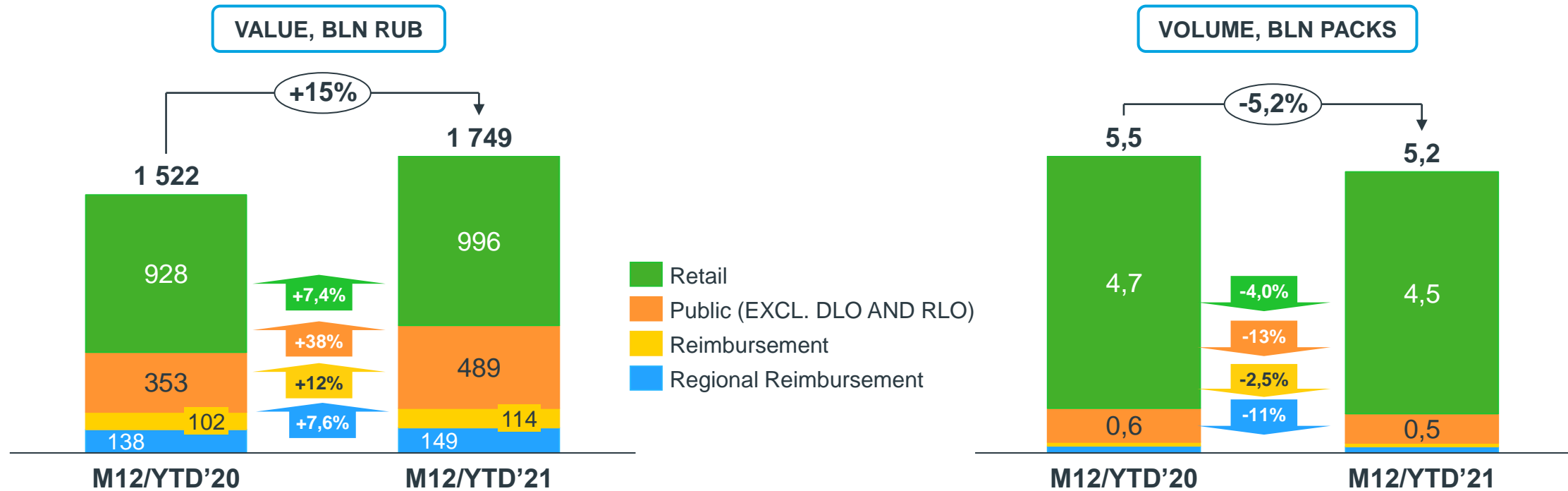
8,4%



INFLATION

Russian pharma market growth in Jan-Dec 2021

Market grew by 15% in value and decreased by 5% in volume



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

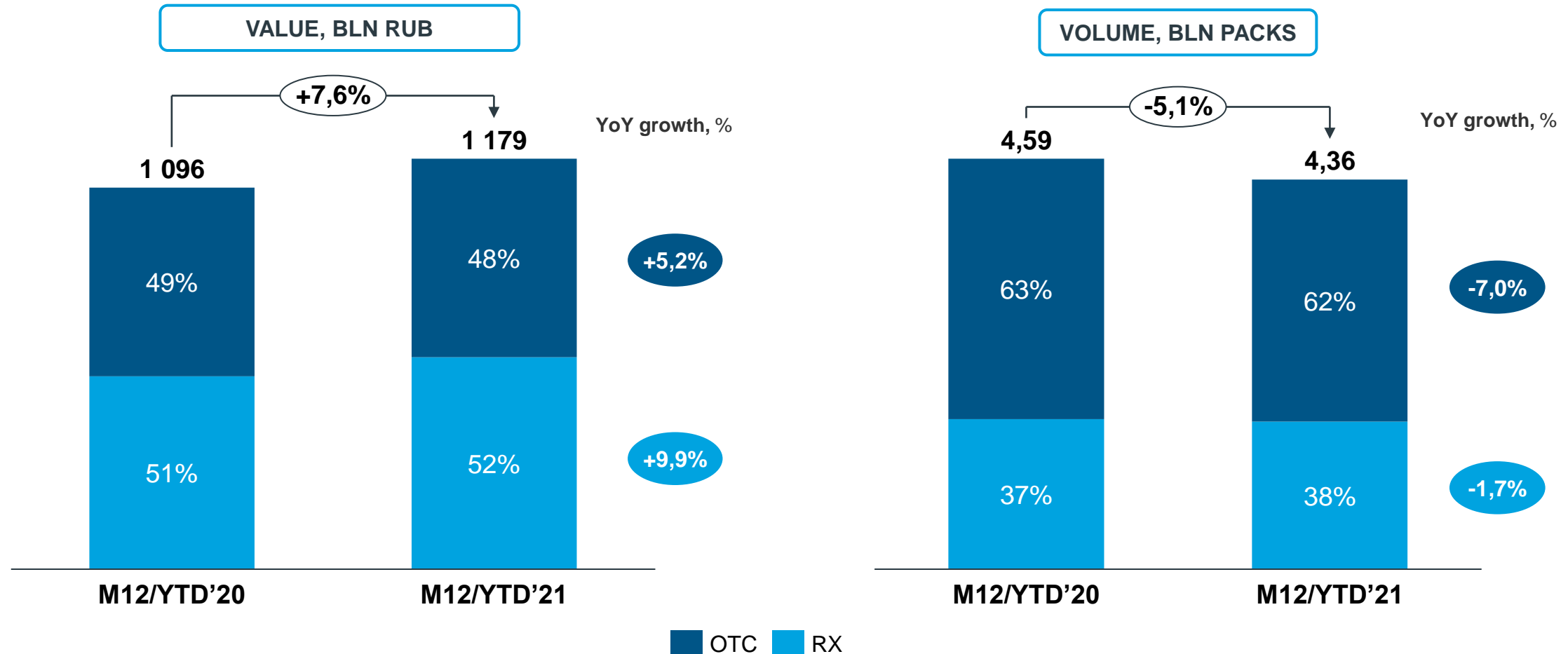
Indicator	RUB	USD	EUR	PACKS
Value M12/YTD'21, Bln.	1 749	23,8	20,2	5,2
Growth M12/YTD'21, %	▲ 15%	▲ 13%	▲ 9,1%	▼ -5,2%

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



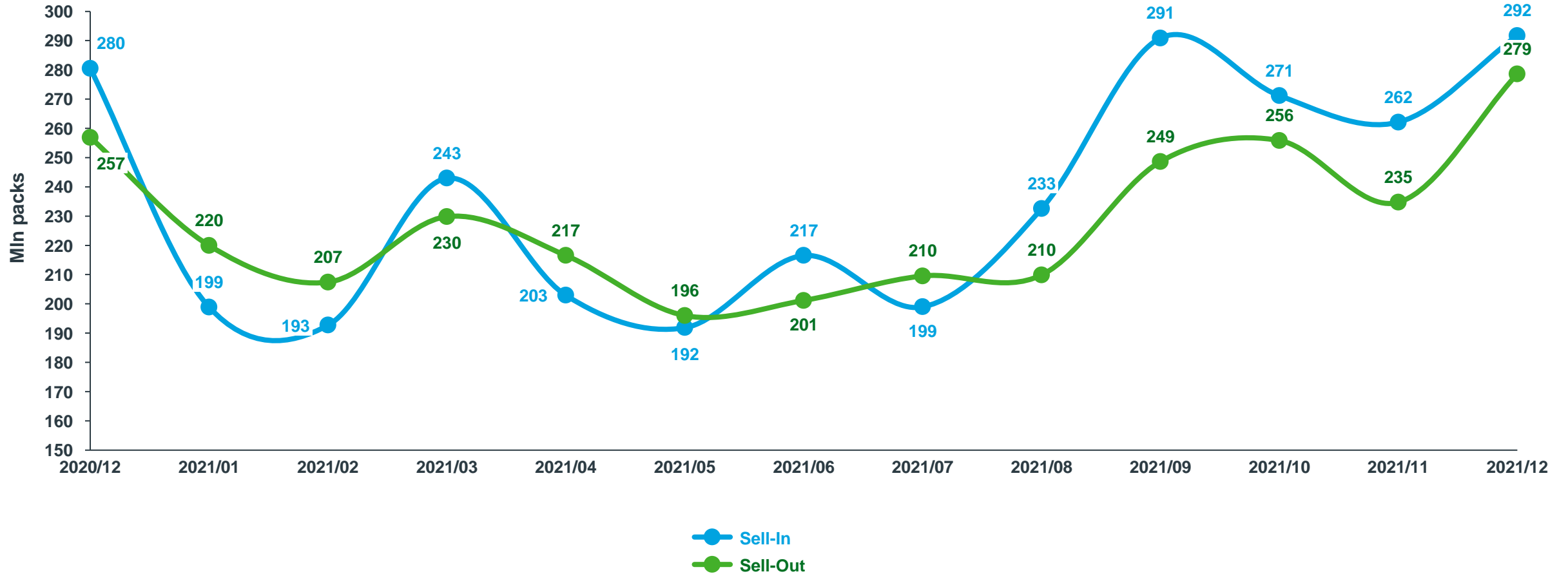
Russian pharma market increase in Jan-Dec 2021

Retail Sell-Out: Market grew by 7,6% in value and dropped by 5,1% in volume



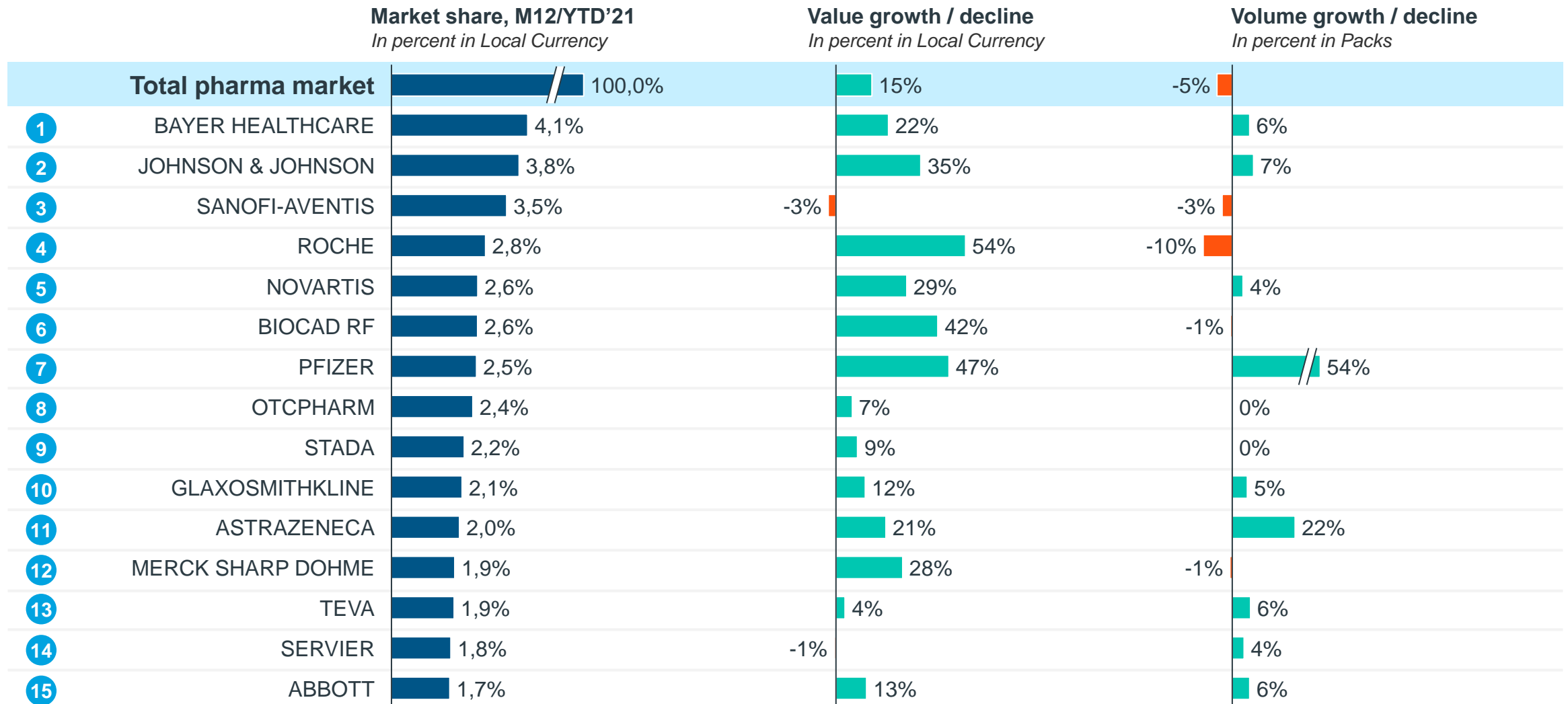


Sell-In vs Sell-Out, OTC registered drugs



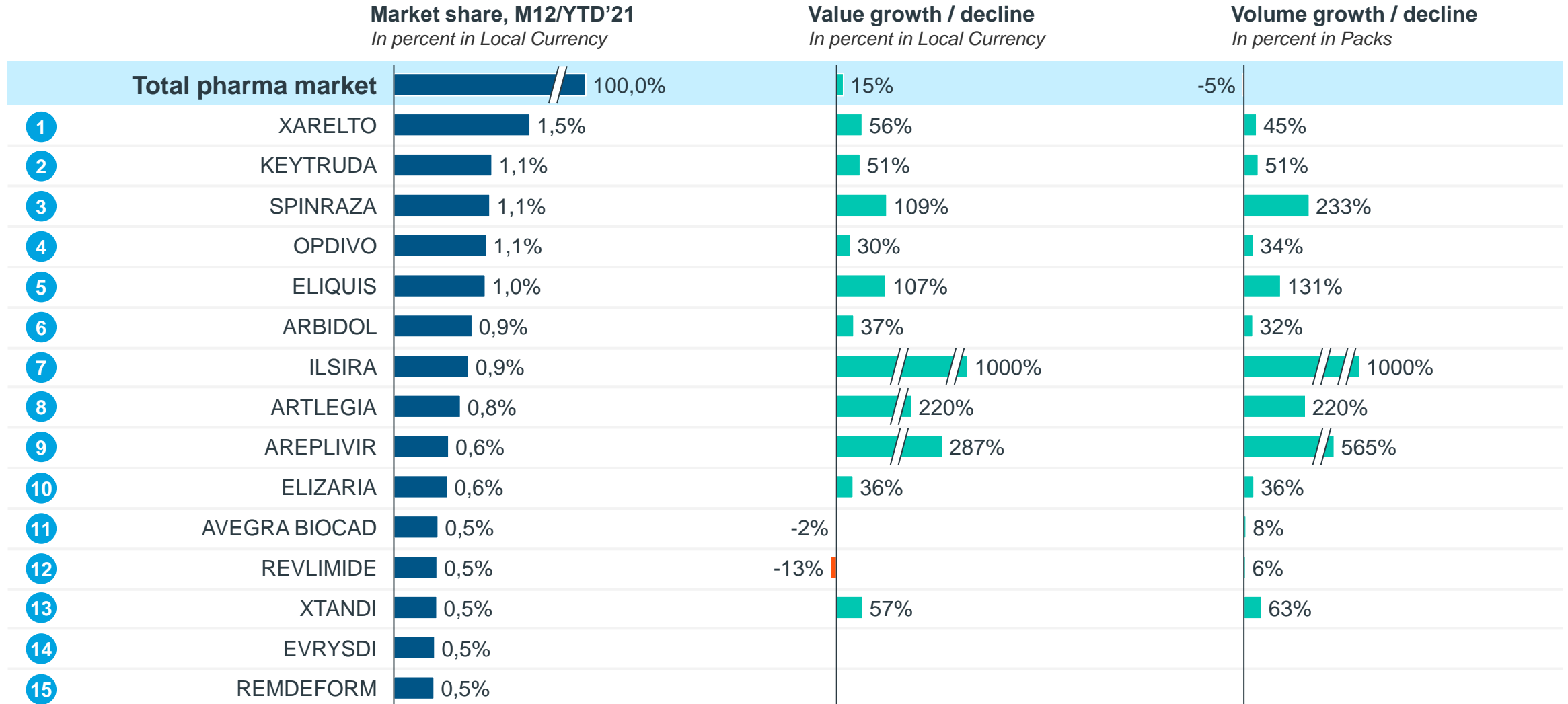


TOP-15 corporations on Russian market, Jan-Dec 2021

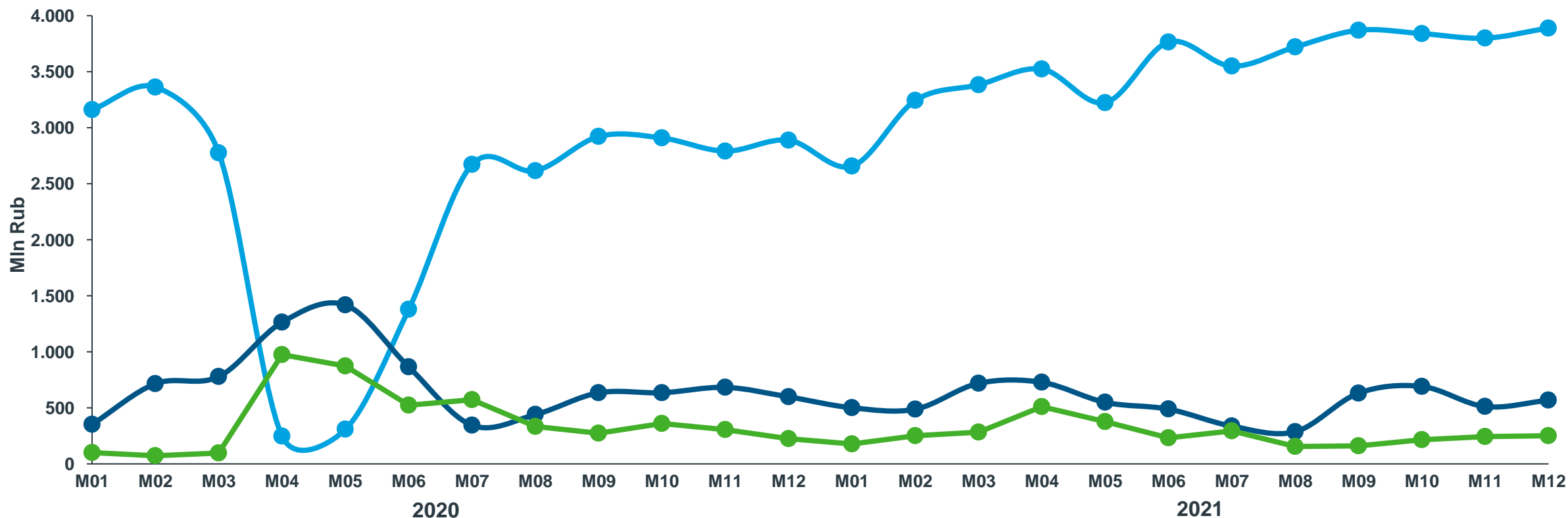




TOP-15 brands on Russian market, Jan-Dec 2021



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

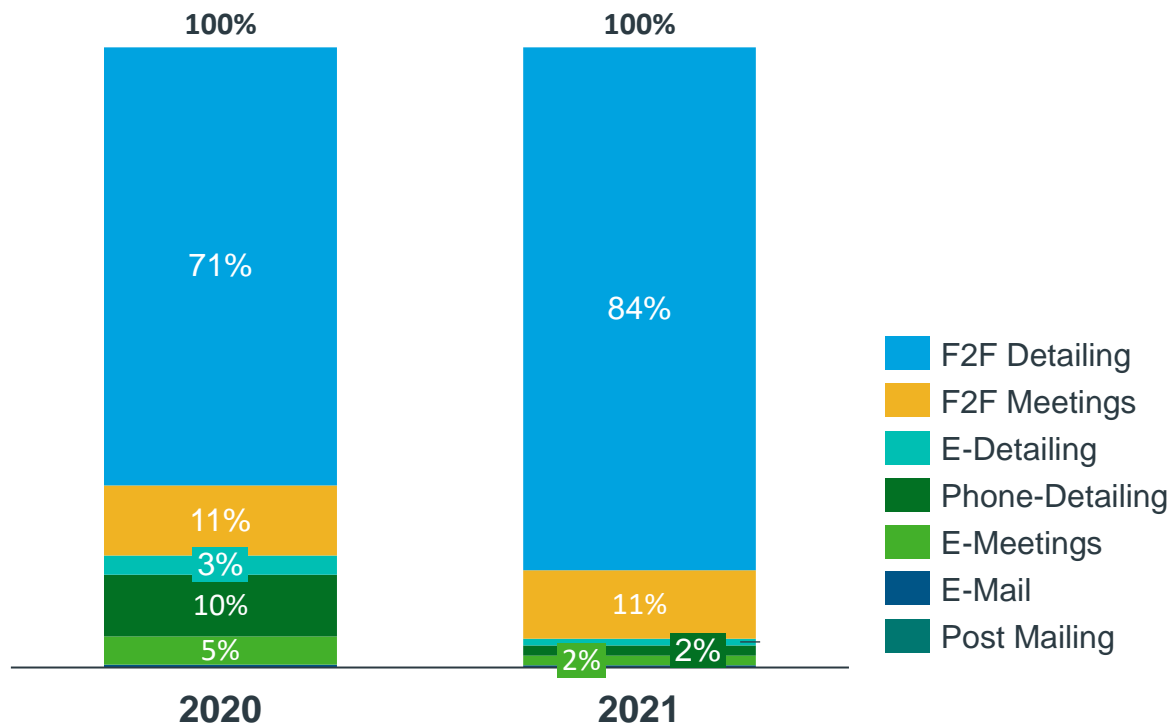
Source: IQVIA Russia, Channel Dynamics promo évaluation; Specialties: Allergology/Pulmonology, Cardiology, Dermatology, Diabetes, E.N.T., Gastroenterology, GPs, Gynecology, Neurology, Oncology, Pediatric, Pharma, Psychotherapy, Urology.



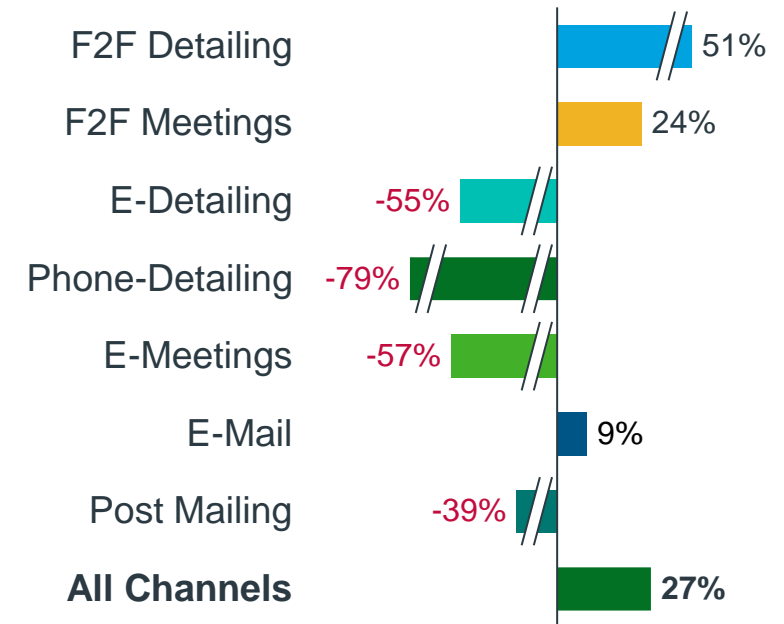
Total Market overall promotional value in Rub increased by 27%, 2021 vs 2020



Promotional value in Rub share by channel



% Changes in promotional value in Rub by channel 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 digital platforms 2) E-meetings – group e-meetings, webinars etc

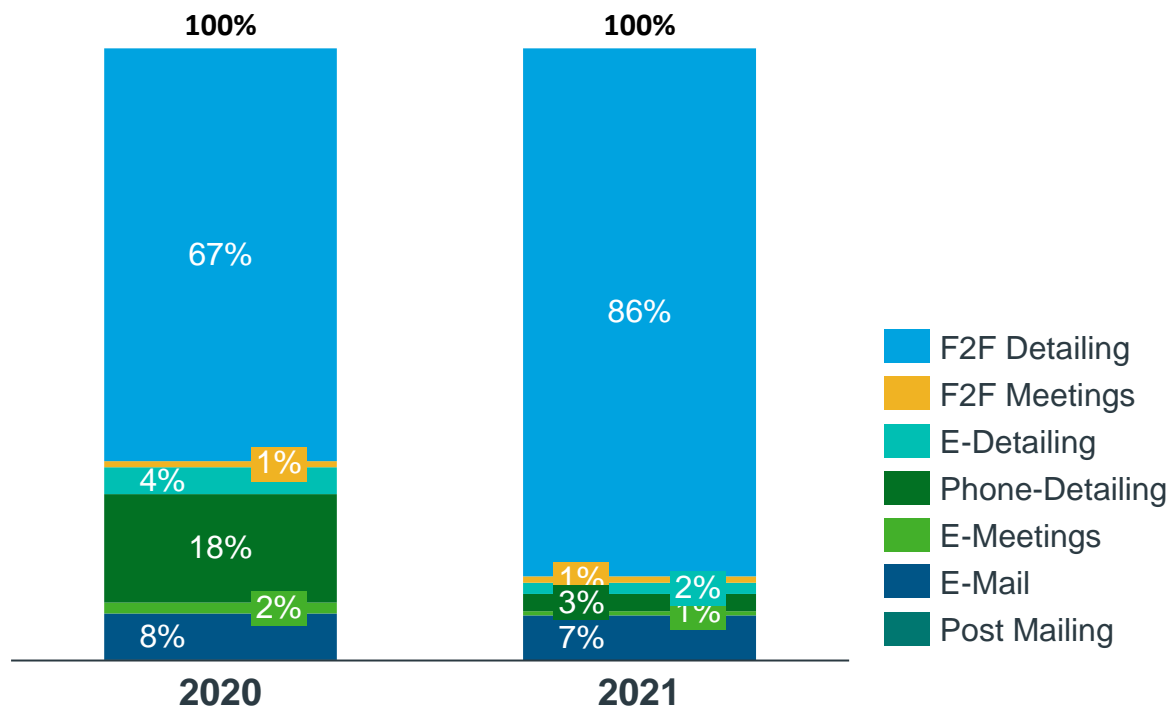
Value – a cost of each interaction projected on doctor's universe

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.

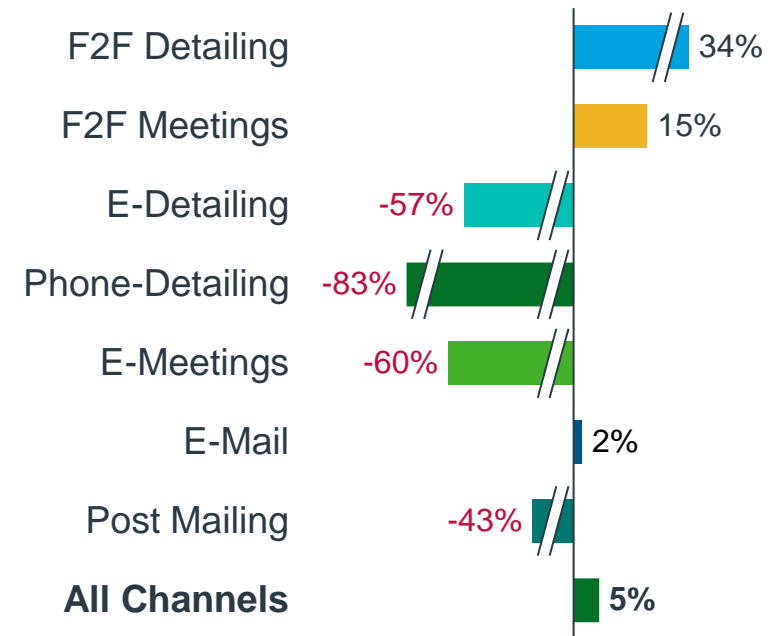
Total Market overall promotional volume (contacts) increased by 5%, 2021 vs 2020



Promotional value in Rub share by channel



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



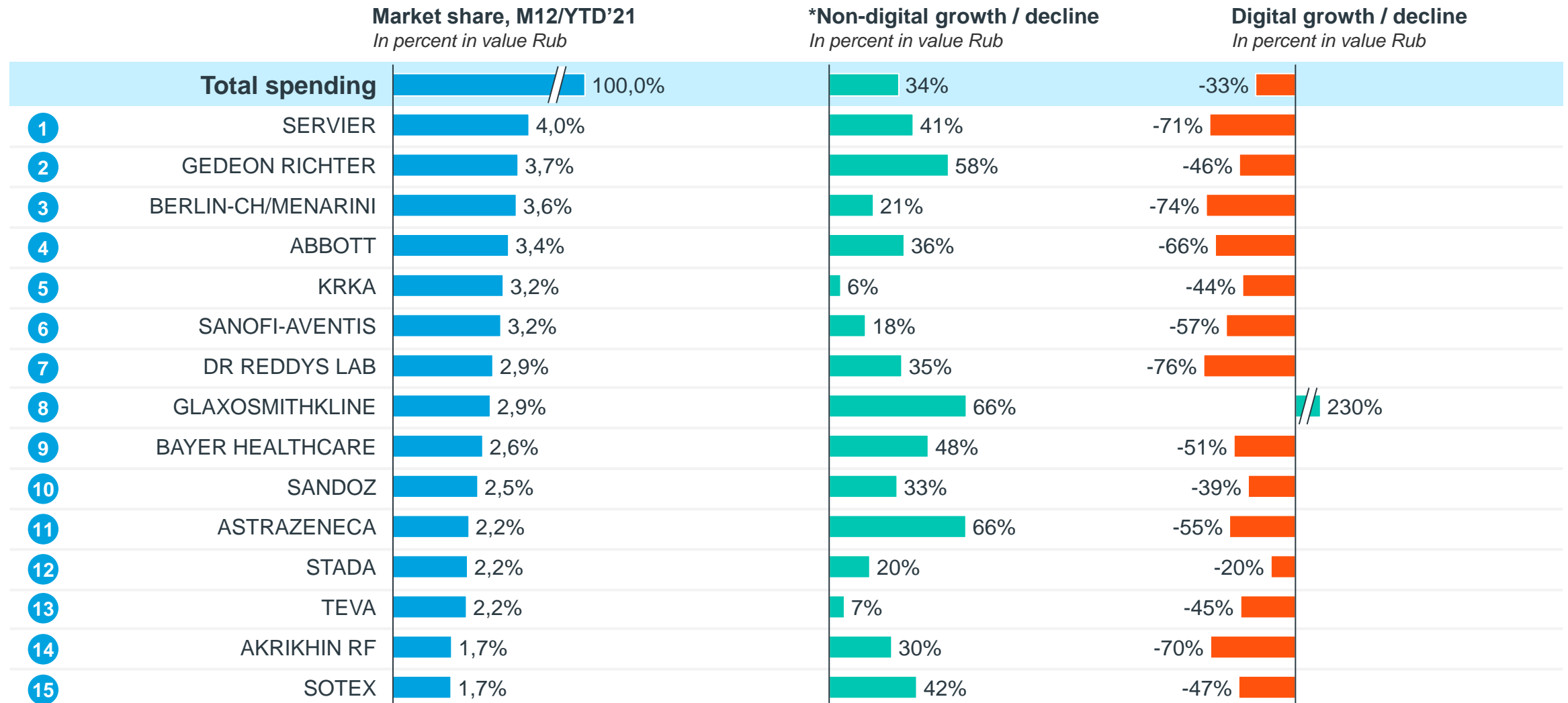
F2F Detailing – Reps visits. **Traditional others:** 1) F2F meetings – group meetings, round tables etc, 2) Phone Detailing – phone calls, 3) E-mail – communication via email. 4) Post Mailing – paper mails. **Digital:** 1) E-detailing – 1-1 calls visits using digitabl platforms 2) E-meetings – group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



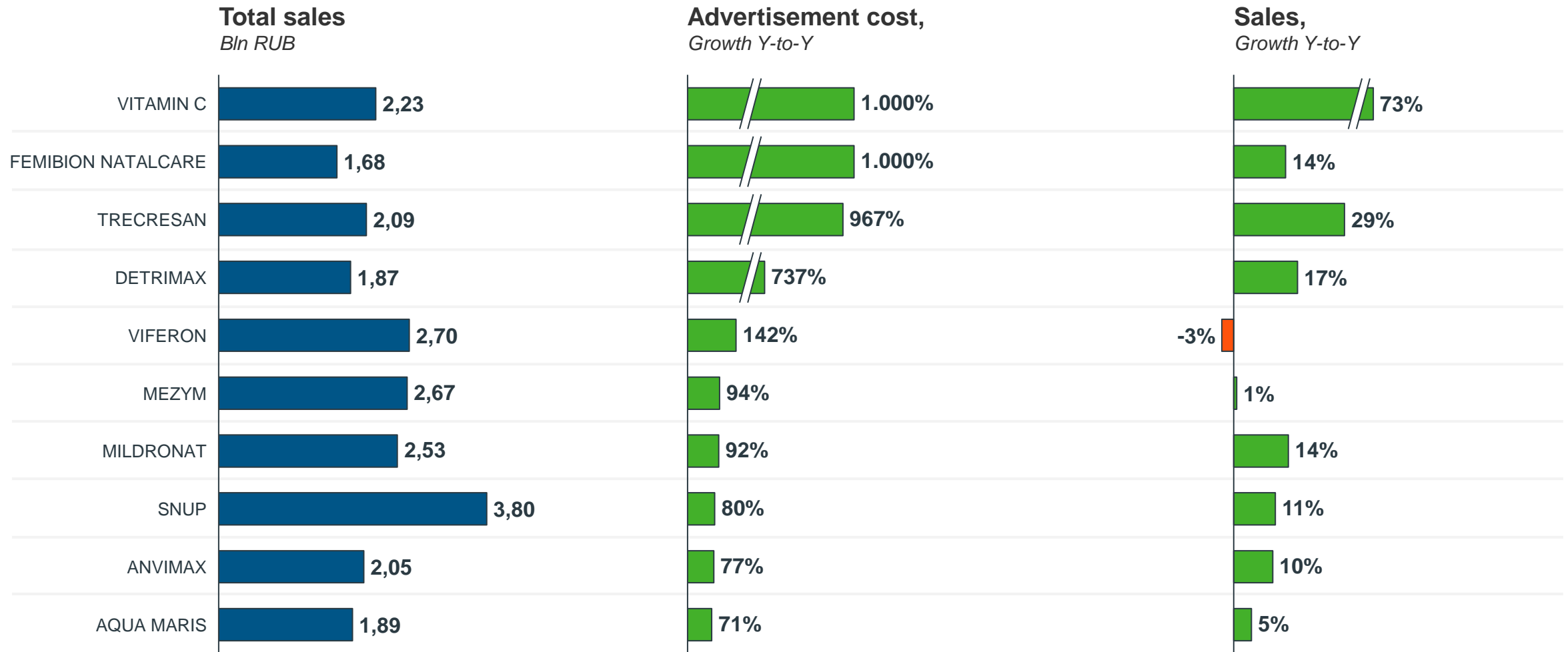
TOP-15 corporations on promotional value in Rub, 2021



*Non-digital: F2F Detailing + Traditional others.

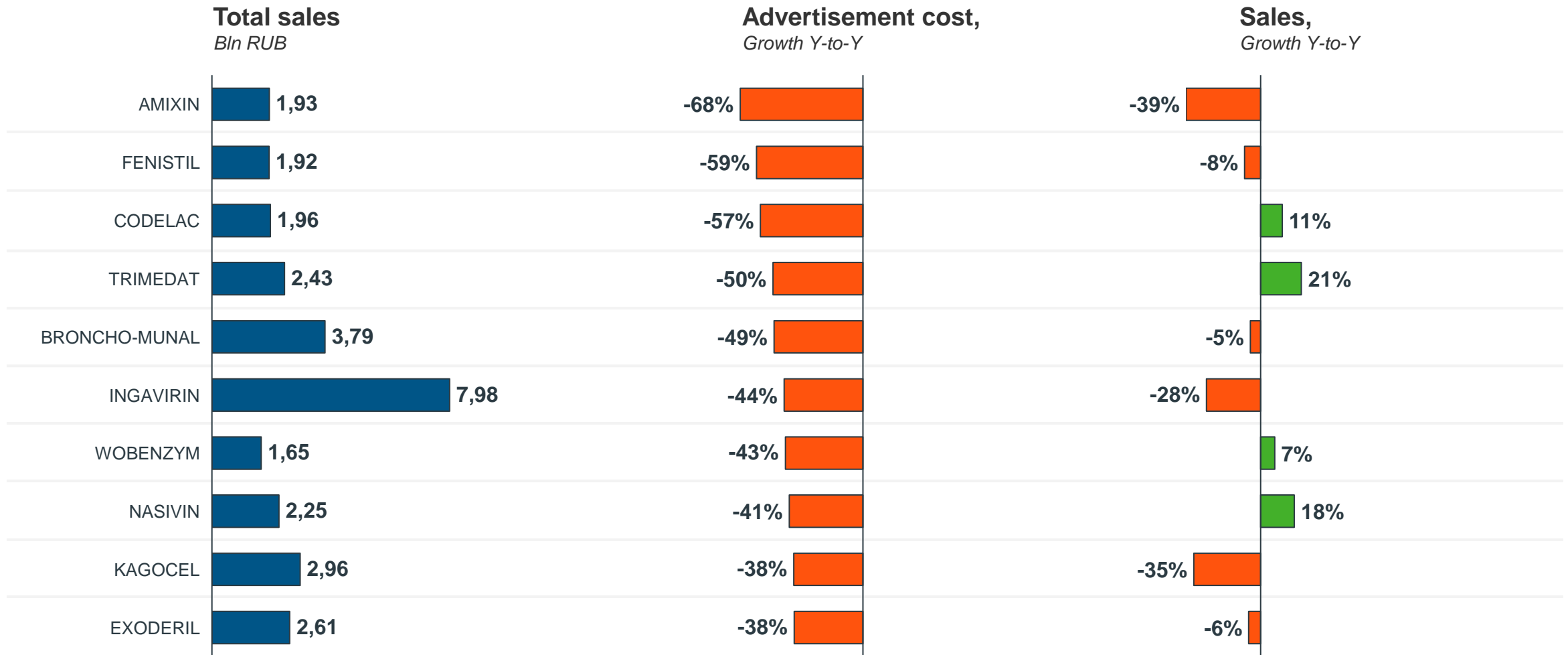
Source: IQVIA Russia, Channel Dynamics promo évaluation; Specialties: Allergology/Pulmonology, Cardiology, Dermatology, Diabetes, E.N.T., Gastroenterology, GPs, Gynecology, Neurology, Oncology, Pediatric, Pharma, Psychotherapy, Urology.

TOP-10 products by growth in advertisement investments in Jan-Dec 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 Jan-Dec 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



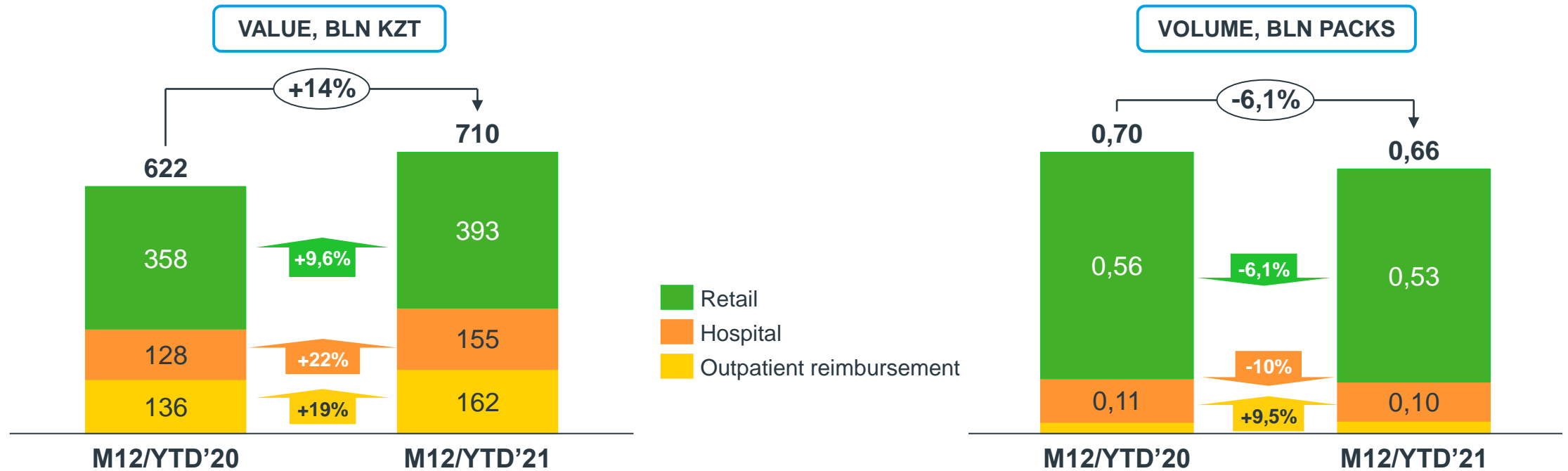
8,4%



INFLATION

Kazakhstan pharma market growth in Jan-Dec 2021

Market grew by 14% in value and decreased by 6% in volume

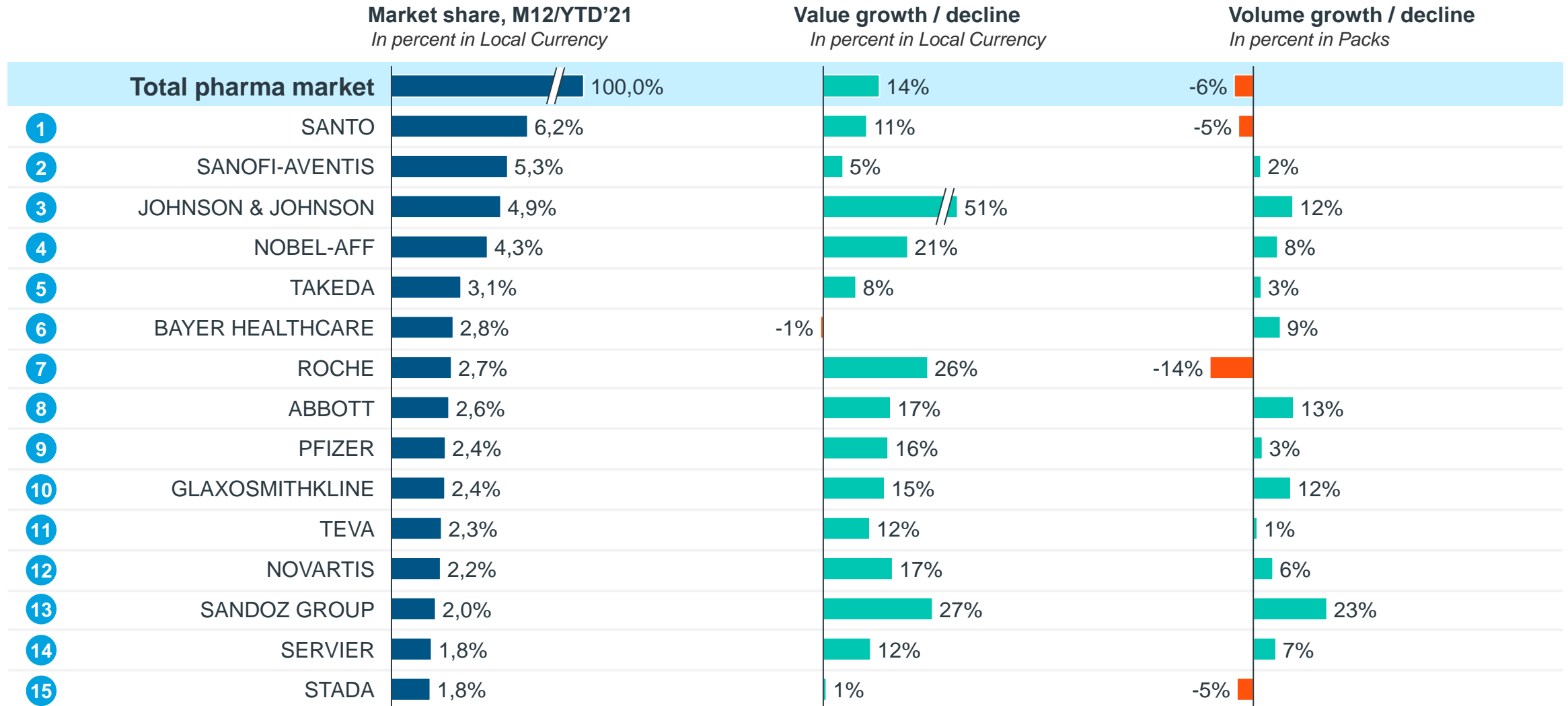


Indicator	KZT	USD	EUR	PACKS
Value M12/YTD'21, Bln.	710	1,67	1,41	0,66
Growth M12/YTD'21, %	▲ 14%	▲ 11%	▲ 6,3%	▼ -6,1%

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



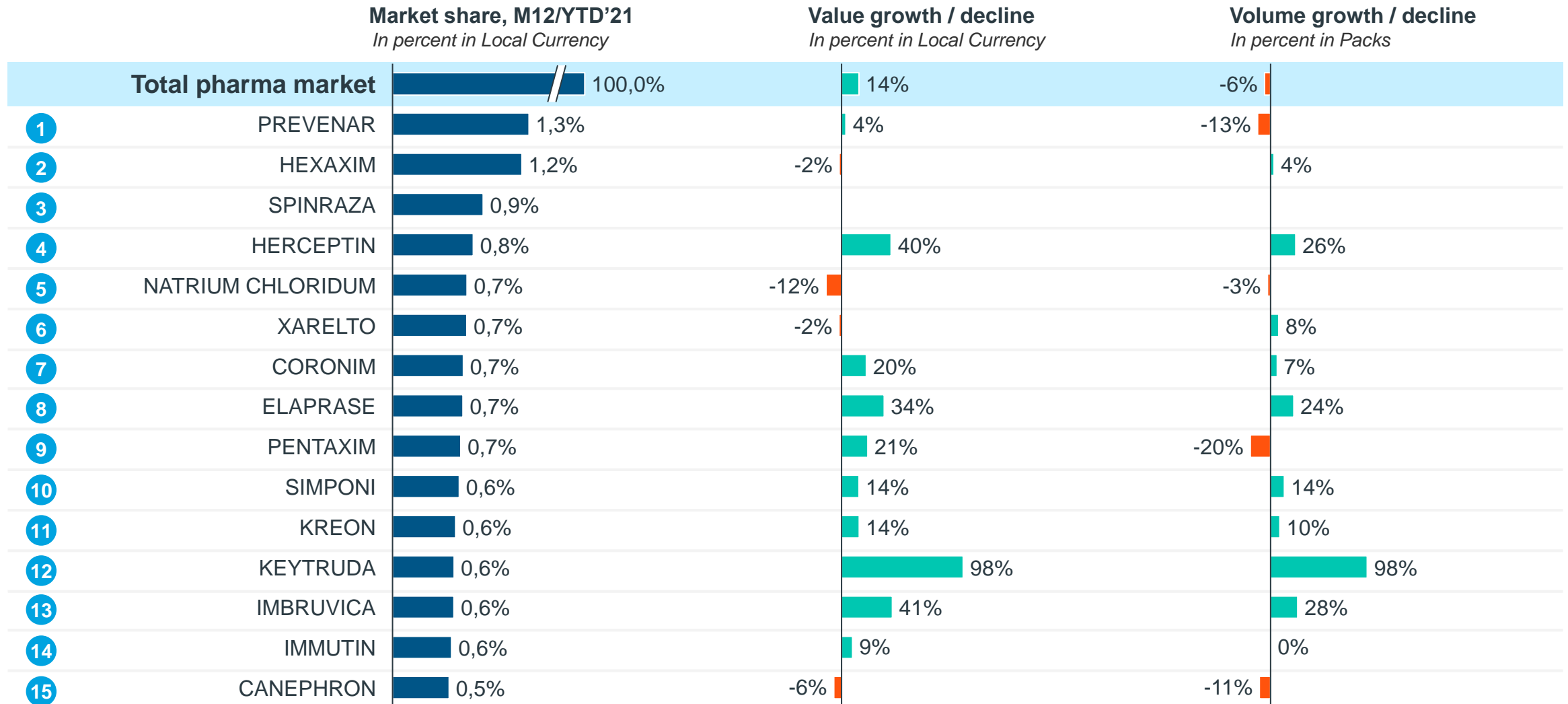
TOP-15 corporations on Kazakhstan market, Jan-Dec 2021



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



TOP-15 brands on Kazakhstan market, Jan-Dec 2021





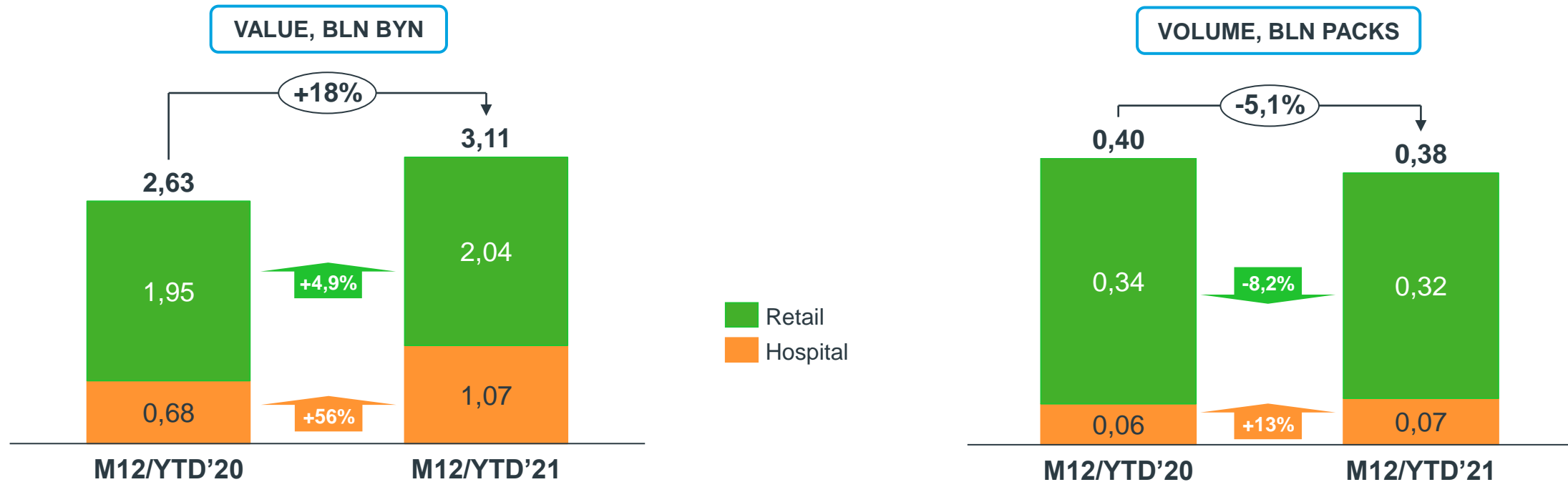
10,0%



INFLATION

Belarus pharma market growth in Jan-Dec 2021

Market grew by 18% in value and decreased by 5% in volume

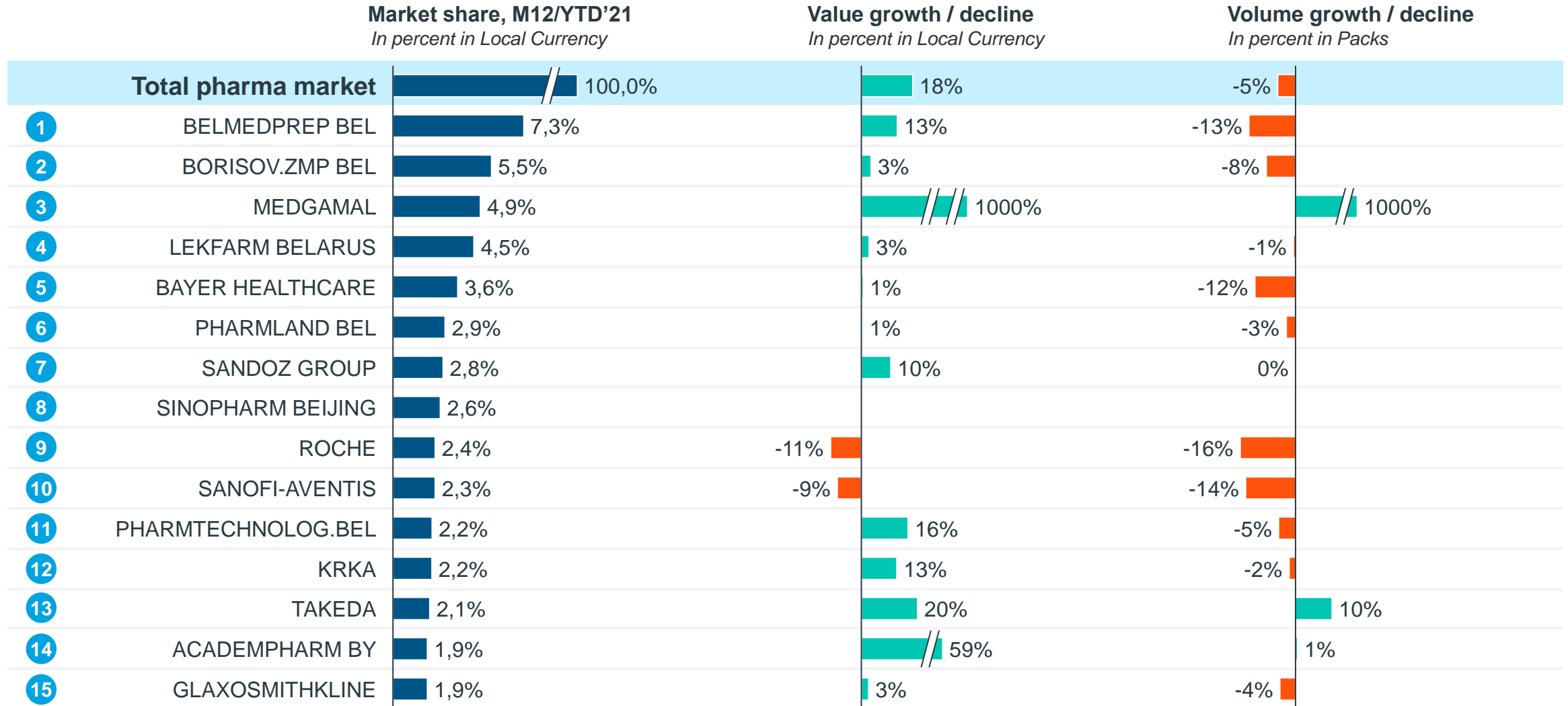


Indicator	BYN	USD	EUR	PACKS
Value M12/YTD'21, Bln.	3,11	1,23	1,04	0,38
Growth M12/YTD'21, %	▲ 18%	▲ 14%	▲ 11%	▼ -5,1%

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-Dec 2021





TOP-15 brands on Belarus market, Jan-Dec 2021

	Market share, M12/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%	18%	-5%
1 GAM-COVID-VAC	4,7%		
2 VAC.BBIBP CORV	2,6%		
3 XARELTO	2,0%	10	2
4 ACTEMRA	1,0%	30	34
5 HEPARIN-BELMED	0,8%	119%	79%
6 NATRIUM CHLORIDUM	0,8%	30%	16%
7 FRAXIPARINE	0,8%	57%	20%
8 RIVAXAN	0,7%	1000%	1000%
9 FRAGMIN	0,6%	61%	63%
10 ACC	0,5%	63%	50%
11 AMLESSA	0,5%	24%	13%
12 GRIPPOL PLUS	0,5%	20%	-3%
13 PROTAMIN-INSUL.	0,5%	25%	16%
14 PERJETA	0,5%	50%	32%
15 VITAVIRIN	0,4%	121%	117%



10,0%



INFLATION

Uzbekistan pharma market growth in Jan-Dec 2021

Market grew by 25% in value and by 10% in volume



Indicator	UZS	USD	EUR	PACKS
Value M12/YTD'21, Bln.	18 123	1,71	1,45	0,92
Growth M12/YTD'21, %	▲ 25%	▲ 19%	▲ 15%	▲ 10%



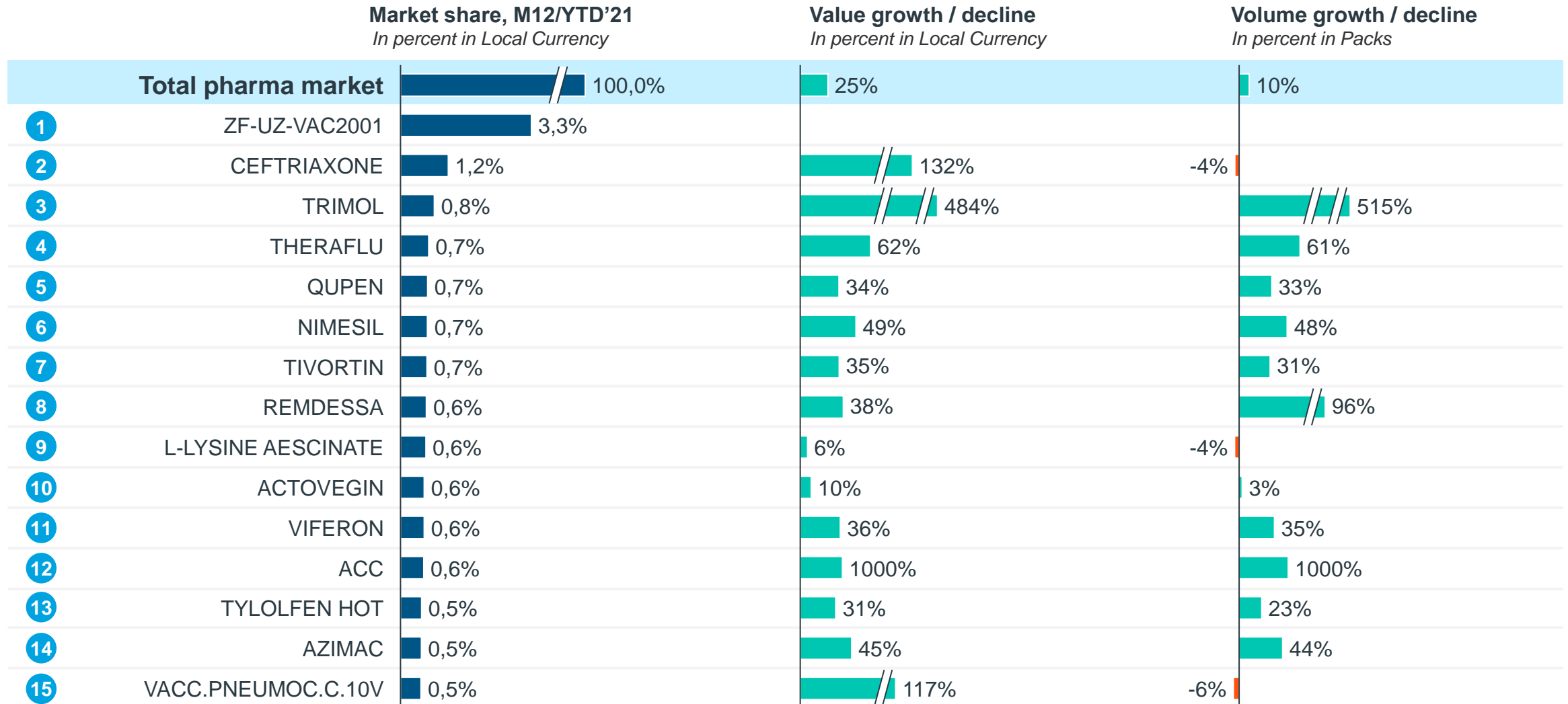
TOP-15 corporations on Uzbekistan market, Jan-Dec 2021

	Market share, M12/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%	25%	10%
1 ANHUI ZHIFEI LONG.	3,3%		
2 KRKA	3,1%	5%	6%
3 SANOFI-AVENTIS	2,7%	32%	30%
4 MENARINI	2,6%	5%	-8%
5 NOVARTIS	2,4%	18%	-4%
6 FARMAK KIEV	2,3%	17%	1%
7 NIKA-PHARM	2,1%	91%	50%
8 WORLD MEDICINE	2,1%	38%	27%
9 ZHURABEK LAB	2,0%	6%	-9%
10 GM PHARMACEUTICALS	1,9%	44%	39%
11 NOBEL ILAC SAN TUR	1,7%	39%	25%
12 ABBOTT	1,7%	19%	15%
13 YURIA-FARM UKR	1,7%	21%	11%
14 GEDEON RICHTER	1,7%	16%	9%
15 POLPHARMA SA	1,6%	44%	39%

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-Dec 2021





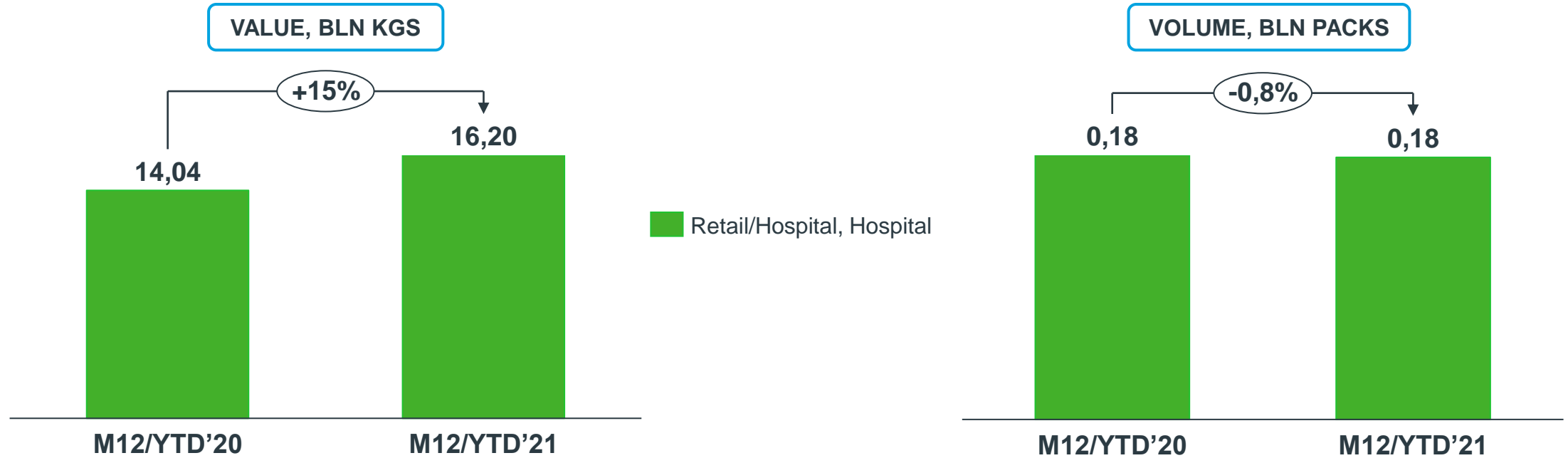
11,2%



INFLATION

Kyrgyzstan pharma market growth in Jan-Dec 2021

Market grew by 15% in value and decreased by 1% in volume

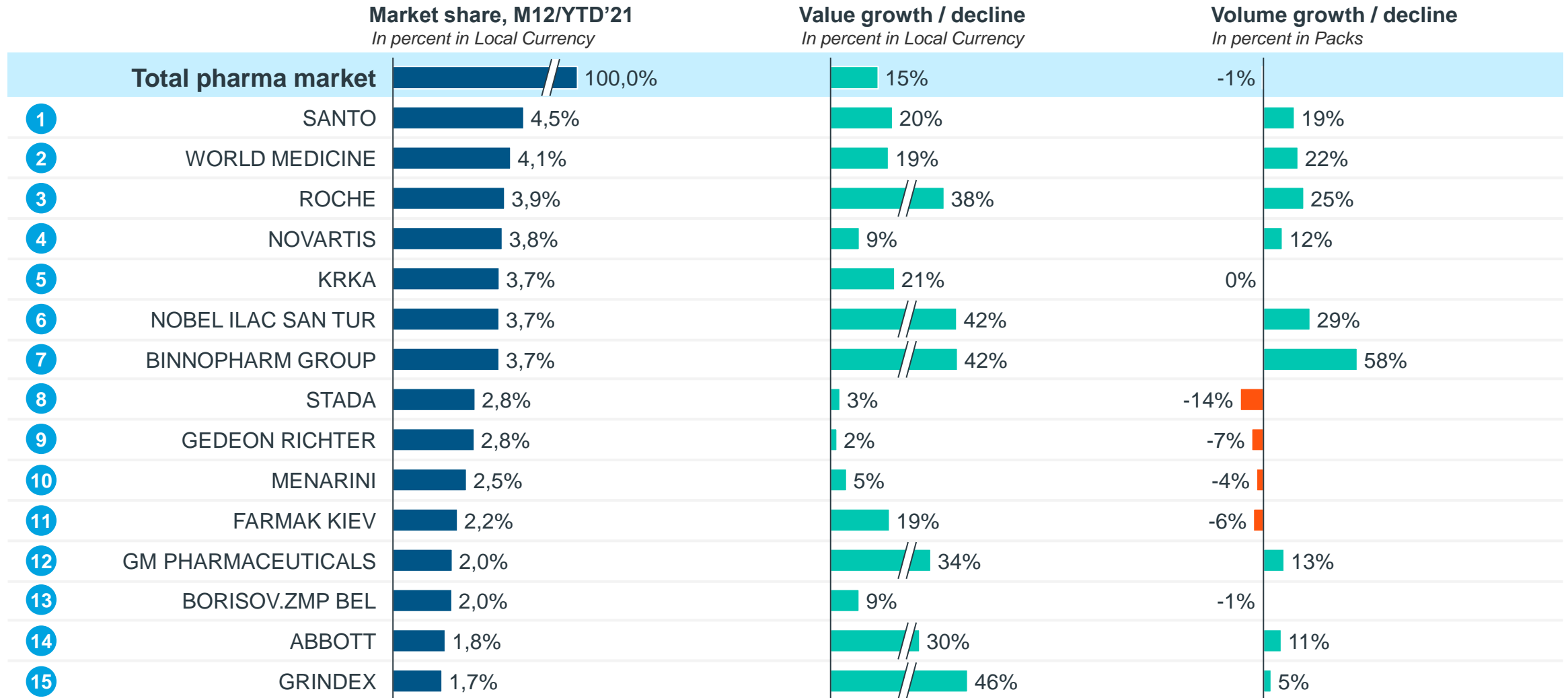


Indicator	KGS	USD	EUR	PACKS
Value M12/YTD'21, Bln.	16,2	0,19	0,16	0,18
Growth M12/YTD'21, %	▲ 15%	▲ 5,2%	▲ 2,1%	▼ -0,8%

Source: IQVIA databases. Retail Market (exclude food supplements and diagnostic agents), TRD Prices
Inflation Rate: Countries - List (tradingeconomics.com)



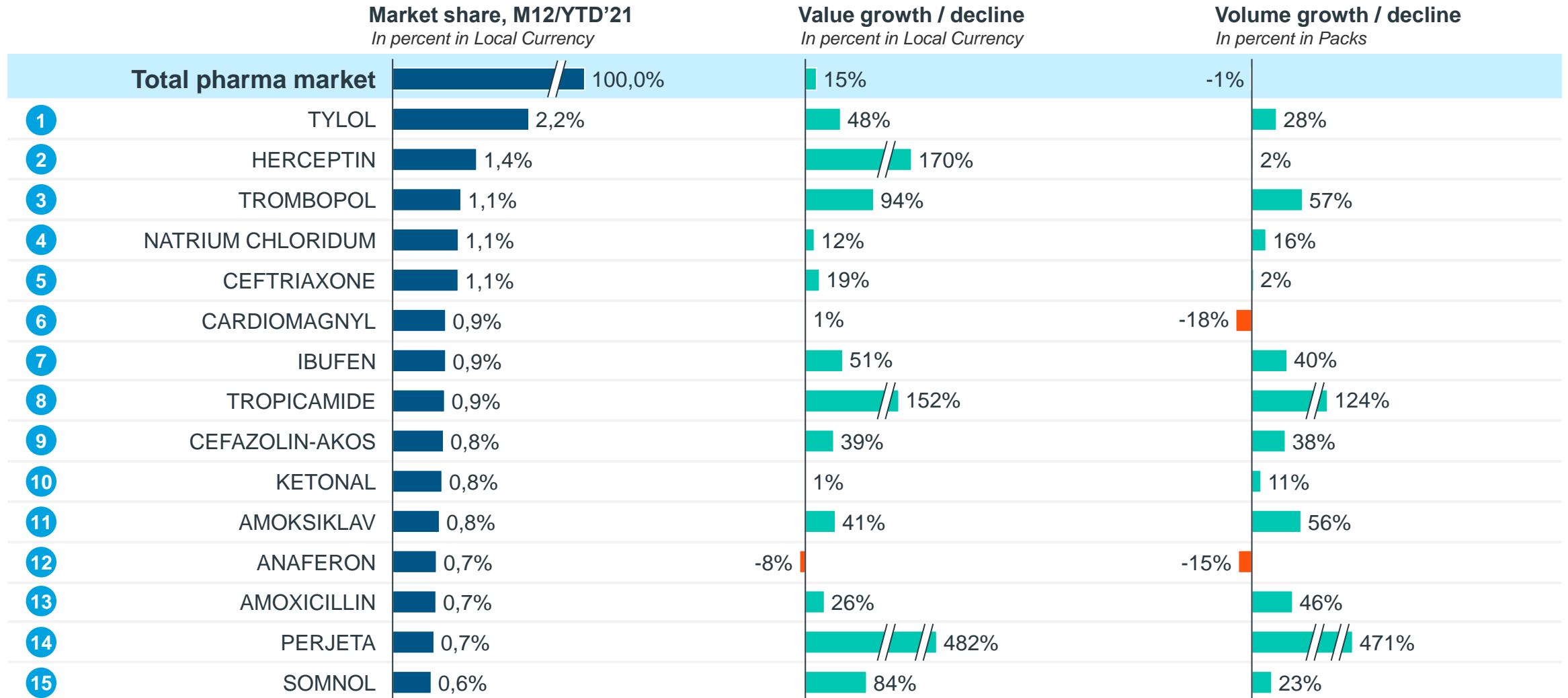
TOP-15 corporations on Kyrgyzstan market, Jan-Dec 2021



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



TOP-15 brands on Kyrgyzstan market, Jan-Dec 2021



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



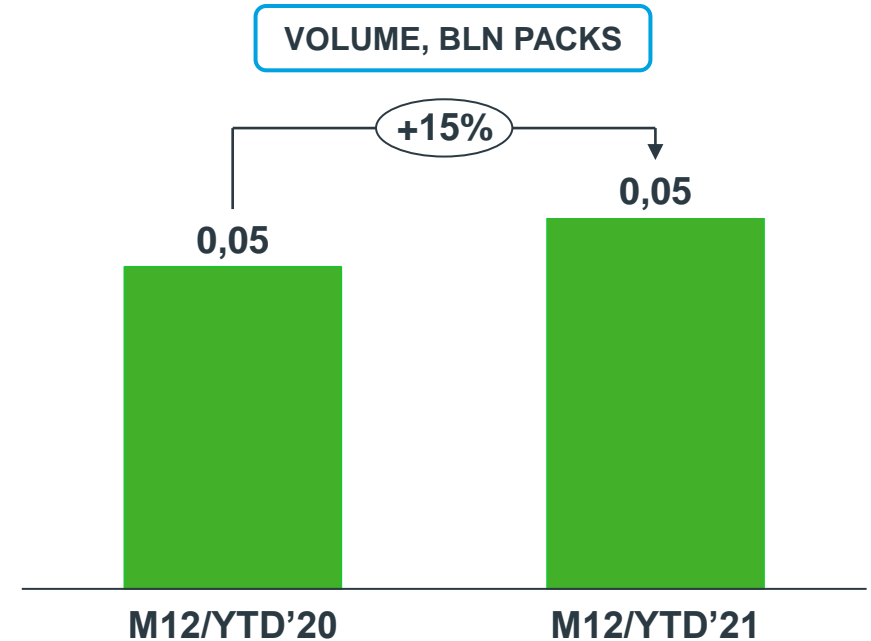
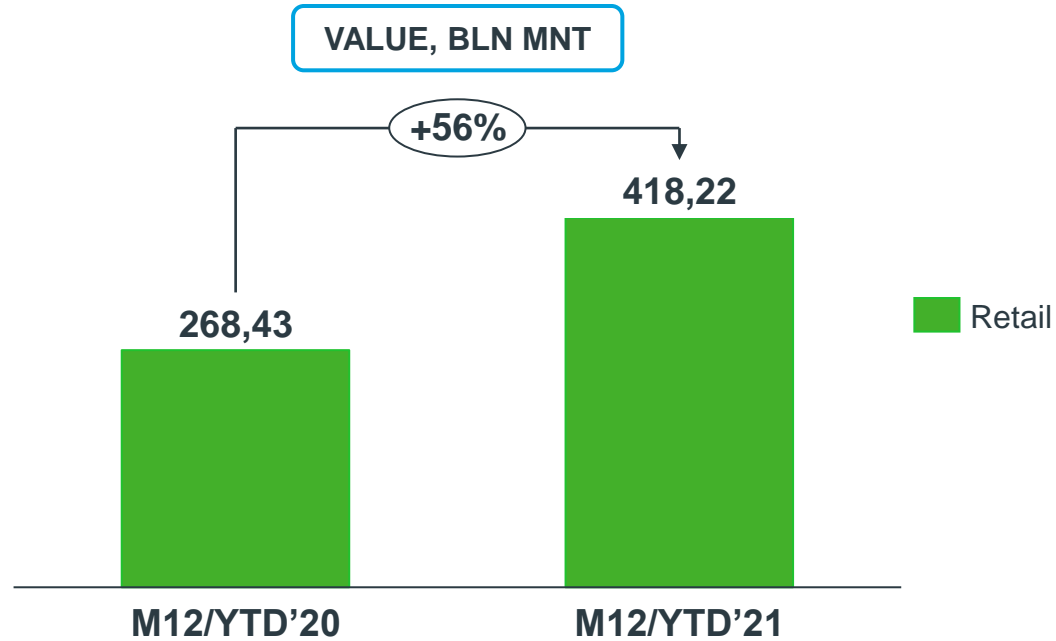
Mongolia pharma market growth in Jan-Dec 2021

Market grew by 56% in value and by 15% in volume

13,4%



INFLATION



Indicator	MNT	USD	EUR	PACKS
Value M12/YTD'21, Bln.	418	0,15	0,12	0,05
Growth M12/YTD'21, %	▲ 56%	▲ 54%	▲ 49%	▲ 15%

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

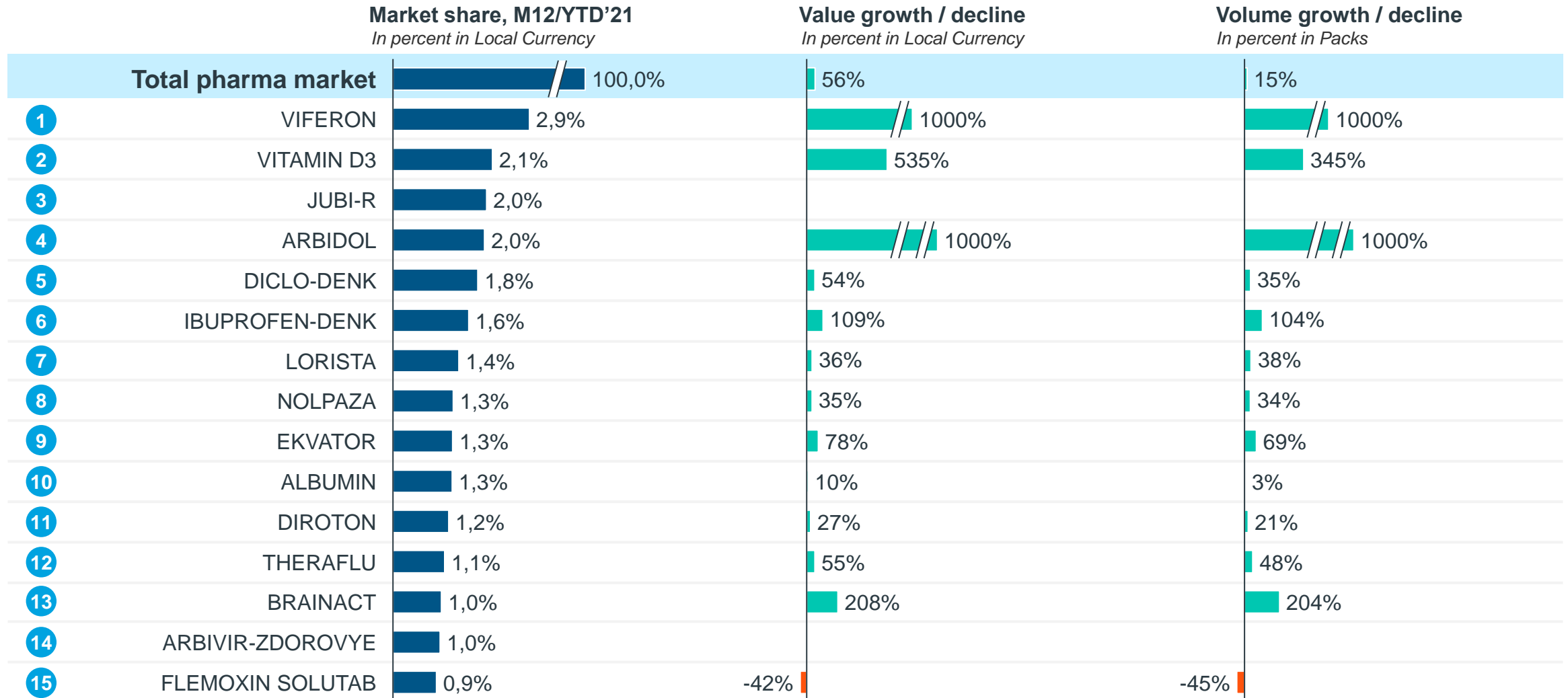


TOP-15 corporations on Mongolia market, Jan-Dec 2021

		Market share, M12/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%	56%	15%
1	KRKA	10,2%	43%	29%
2	DENK PHARMA	9,0%	71%	48%
3	GEDEON RICHTER	7,2%	30%	20%
4	UNIDENTIFIED MANUF	4,5%	1000%	1000%
5	NOVARTIS	3,9%	17%	69%
6	FERON	2,9%	1000%	1000%
7	SANDOZ	2,9%	-9%	-12%
8	ASTELLAS PHARMA	2,4%	-46%	-60%
9	JUBILANT L.S.INDIA	2,0%		
10	BAYER HEALTHCARE	2,0%	93%	83%
11	OTCPHARM	2,0%	1000%	1000%
12	GLAXOSMITHKLINE	1,6%	46%	38%
13	MATERIA MEDICA	1,5%	247%	234%
14	KRASPHARMA	1,5%	319%	264%
15	KALBE FARMA TBK	1,4%	116%	-19%



TOP-15 brands on Mongolia market, Jan-Dec 2021



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