



# Facts from IQVIA

M07 2021



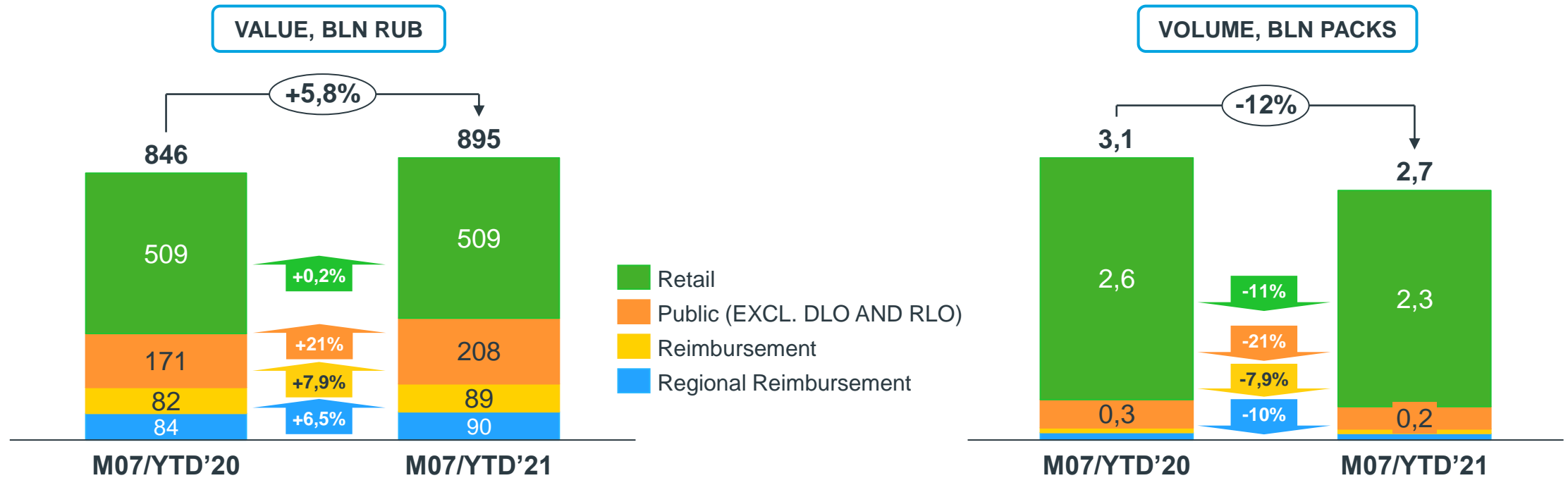
6,5%



INFLATION

# Russian pharma market growth in January-July 2021

Market grew by 5,8% in value and decreased by 12% in volume



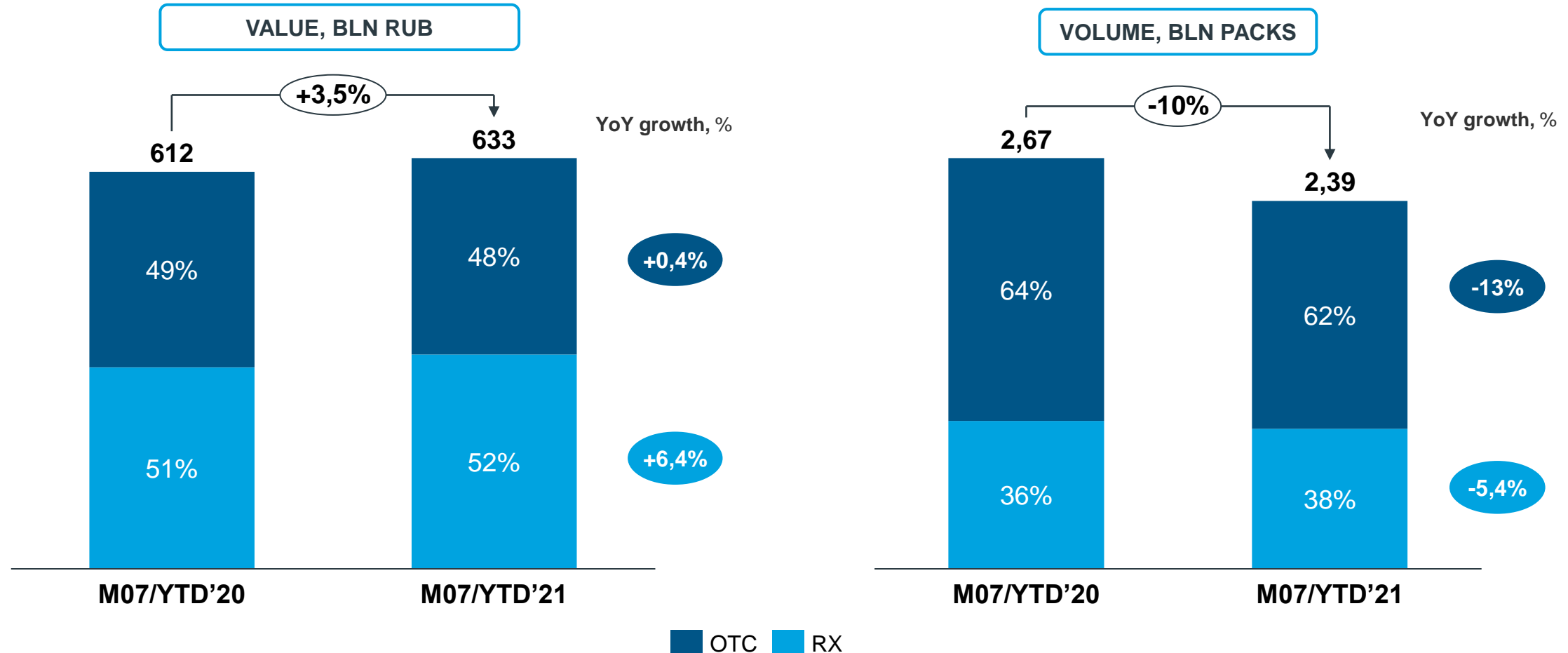
Indicator	RUB	USD	EUR	PACKS
Value M07/YTD'21, Bln.	895	12,1	10,0	2,7
Growth M07/YTD'21, %	▲ 5,8%	▼ -0,8%	▼ -8,5%	▼ -12%

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



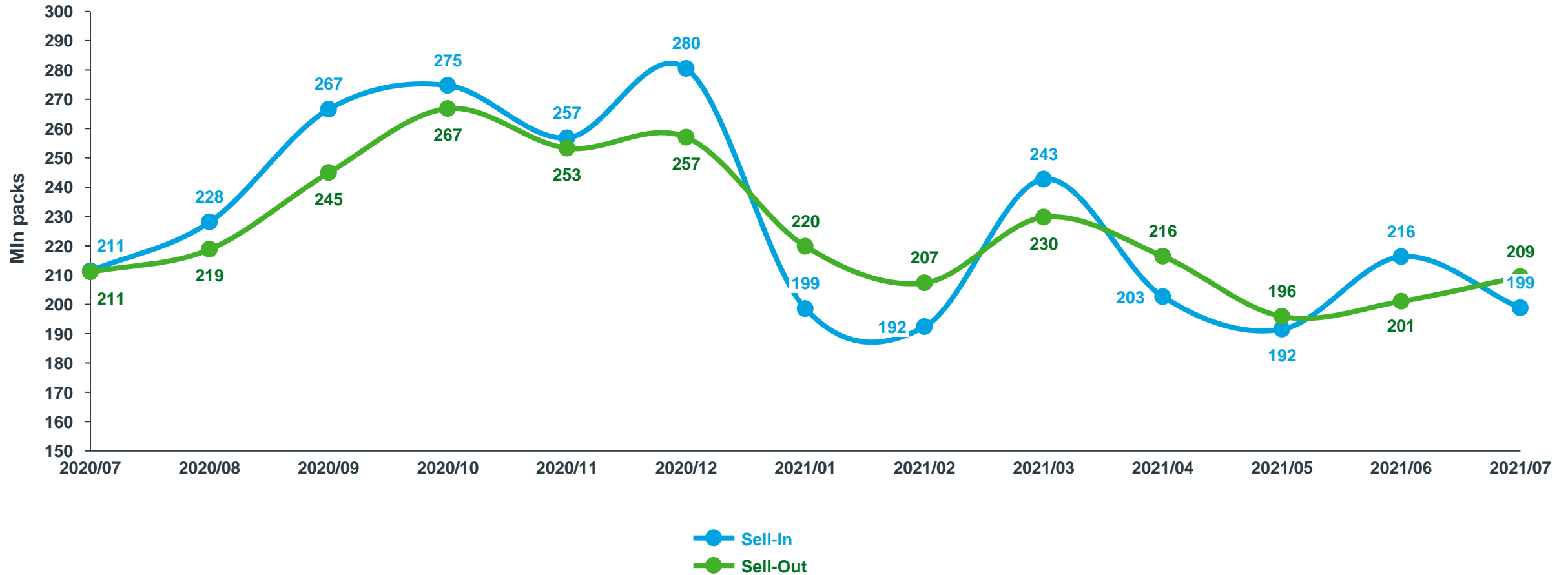
# Russian pharma market increase in January-July 2021

Retail Sell-Out: Market grew by 3,5% in value and dropped by 10% in volume



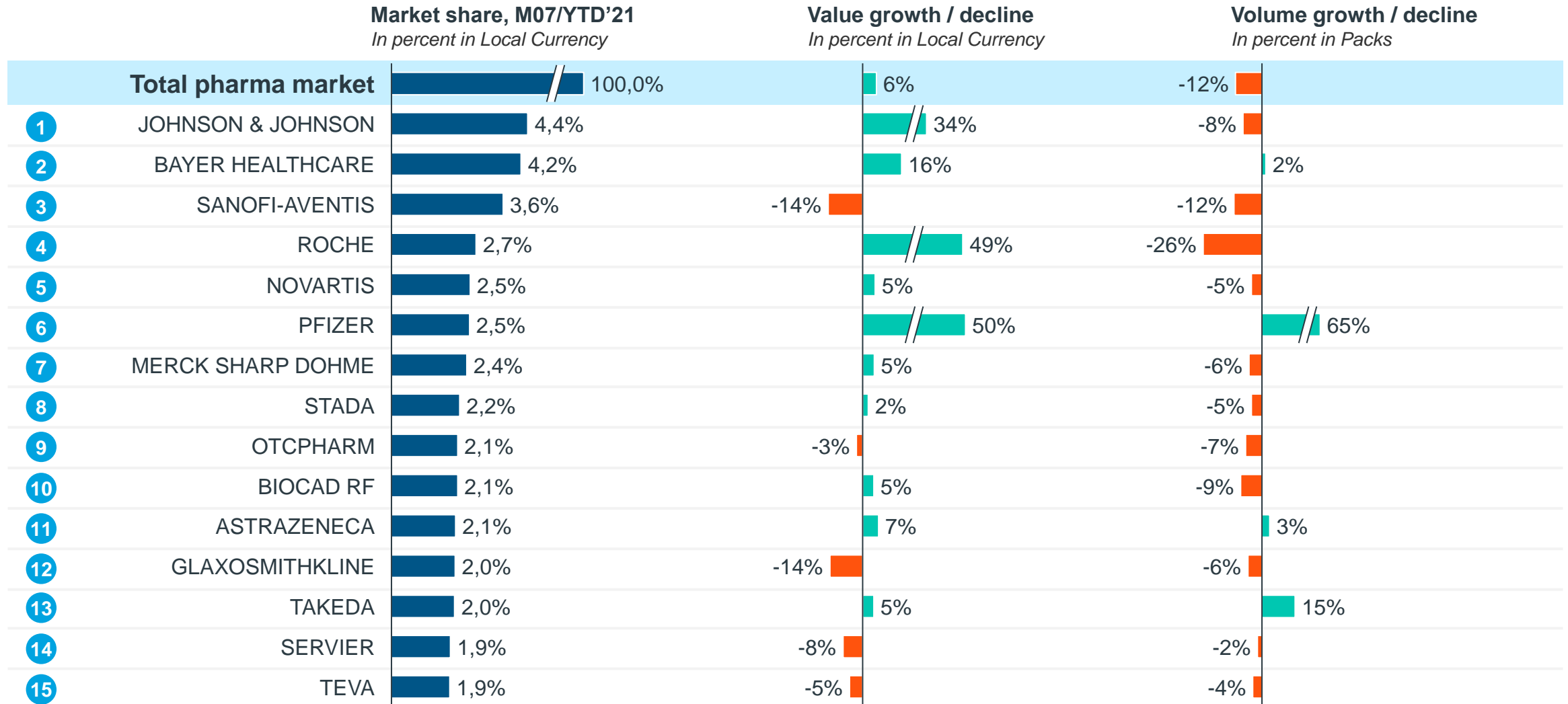


# Sell-In vs Sell-Out, OTC registered drugs





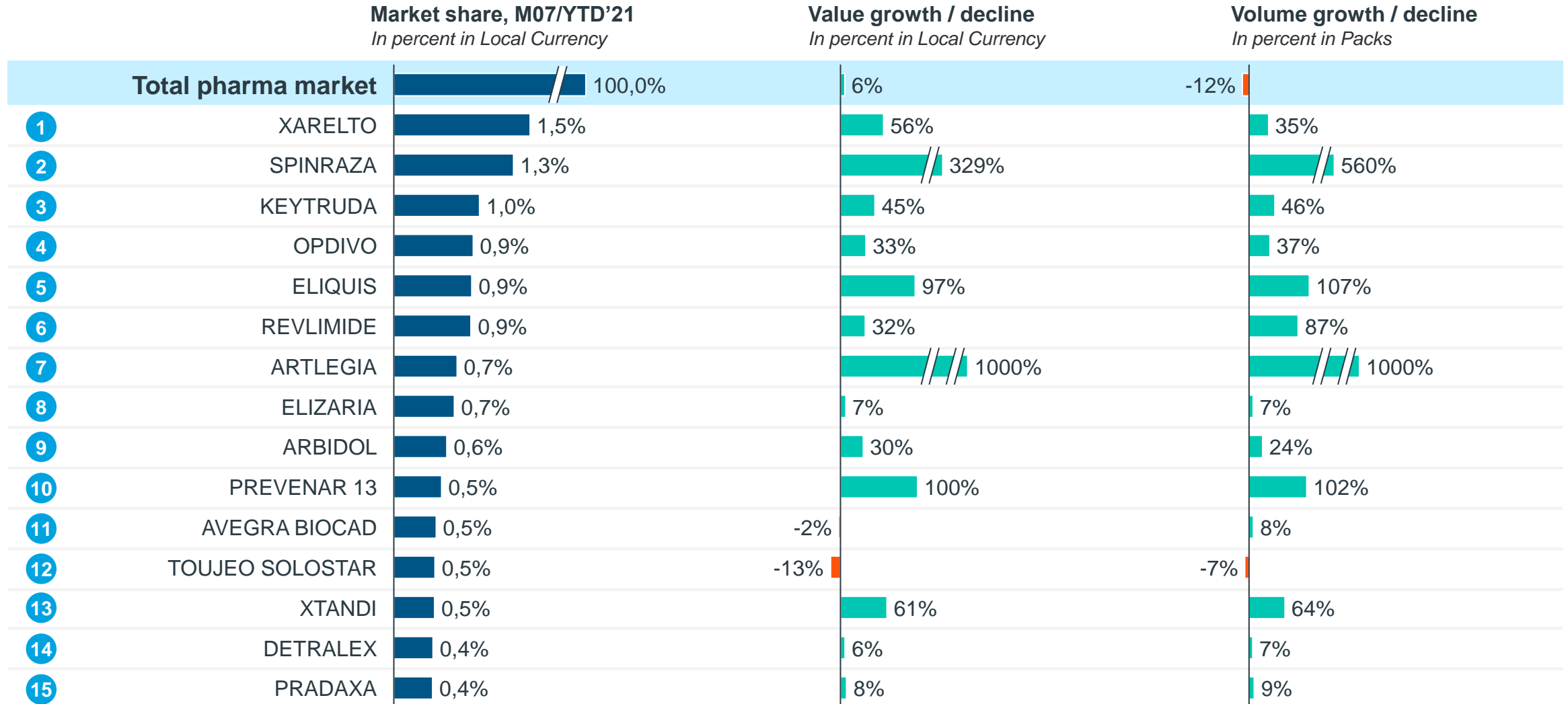
# TOP-15 corporations on Russian market, January-July 2021



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

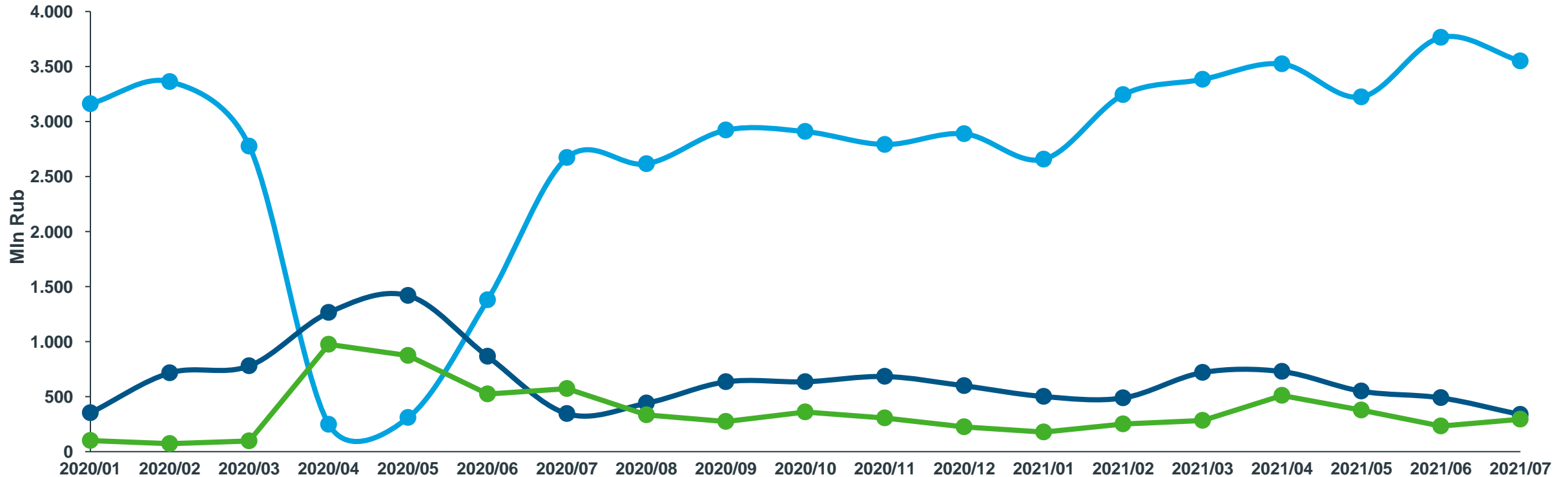


# TOP-15 brands on Russian market, January-July 2021



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-July 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

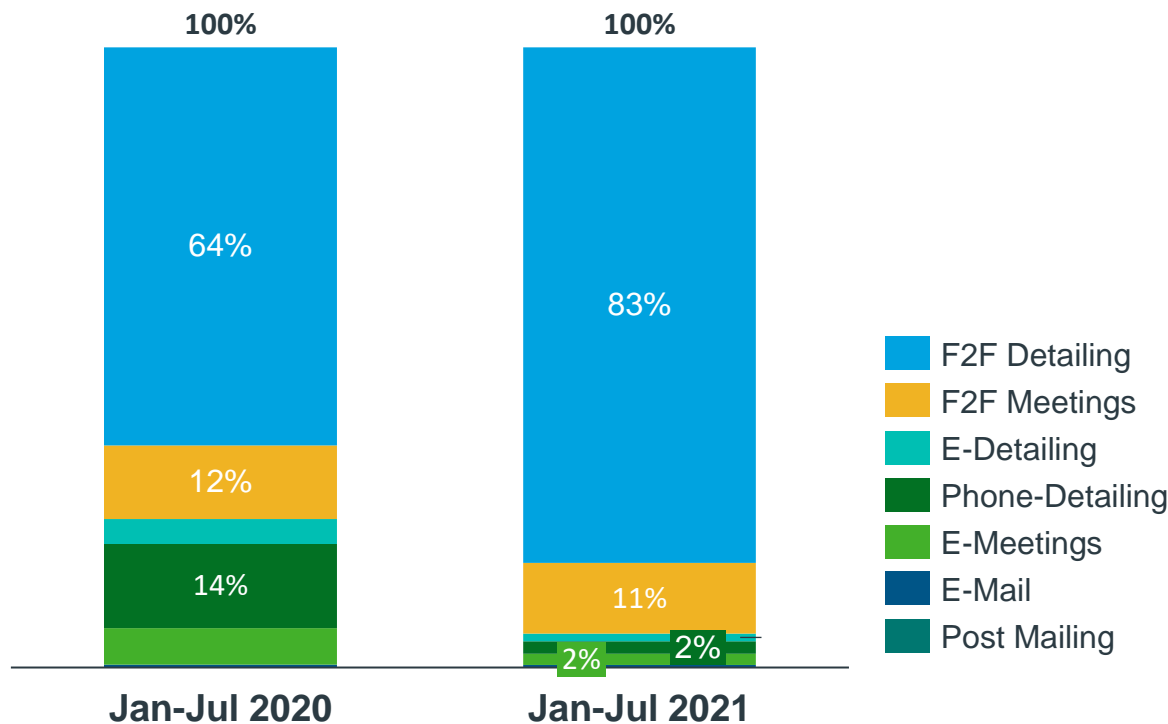
Source: IQVIA Russia, Channel Dynamics promo évaluation; Specialties: Allergology/Pulmonology, Cardiology, Dermatology, Diabetes, E.N.T., Gastroenterology, GPs, Gynecology, Neurology, Oncology, Pediatric, Pharma, Psychotherapy, Urology.

- F2F Detailing
- Traditional others
- Digital

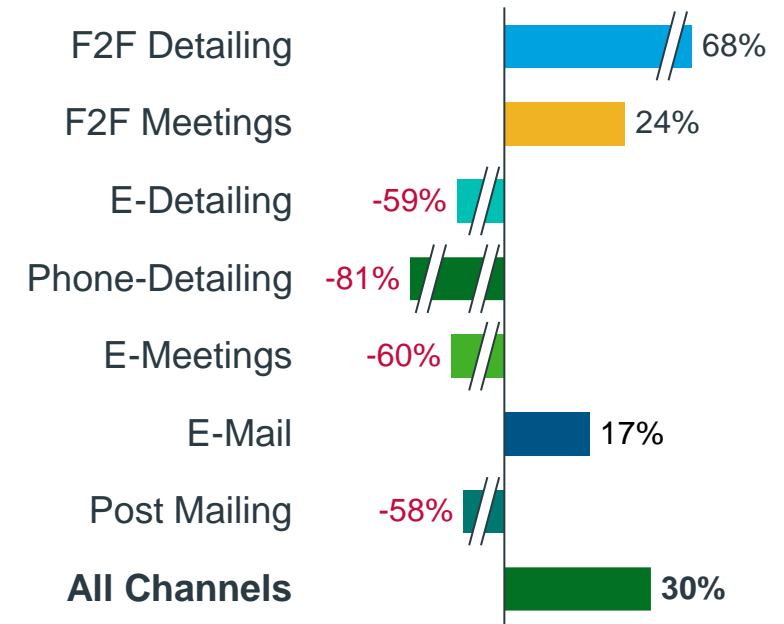
# Total Market overall promotional value in Rub increased by 30%, January-July 2021 vs 2020



Promotional value in Rub share by channel



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

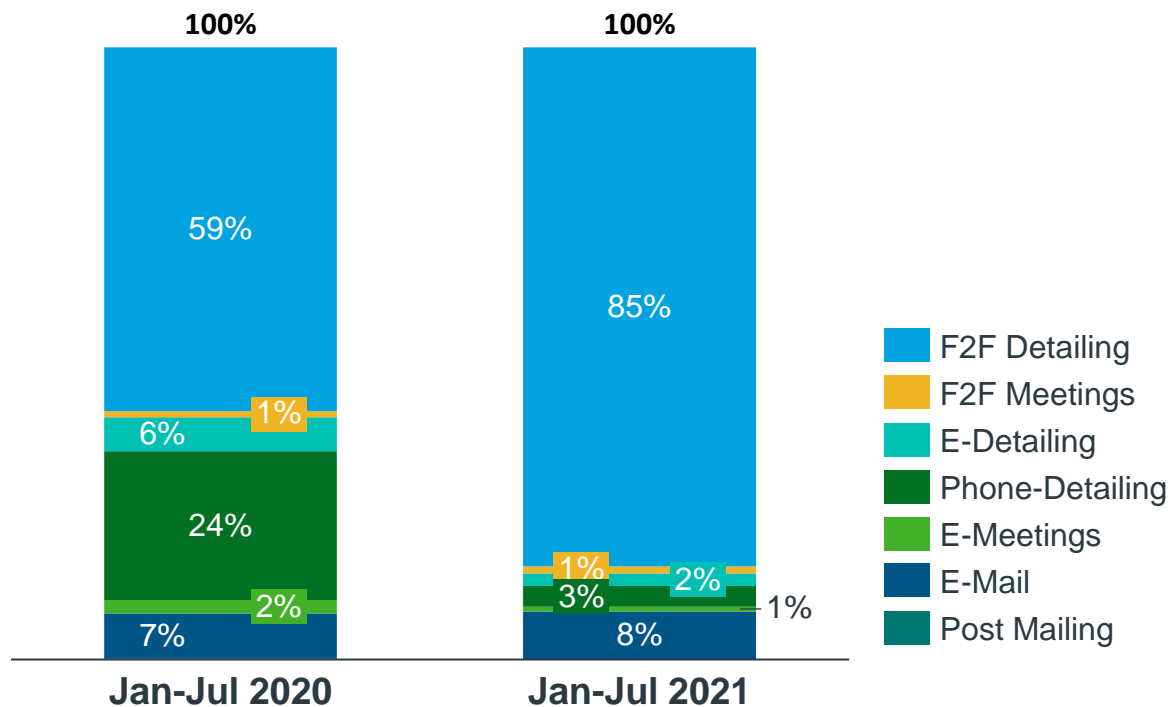
Source: IQVIA Russia, Channel Dynamics promo évaluation; Specialties: Allergology/Pulmonology, Cardiology, Dermatology, Diabetes, E.N.T., Gastroenterology, GPs, Gynecology, Neurology, Oncology, Pediatric, Pharma, Psychotherapy, Urology.



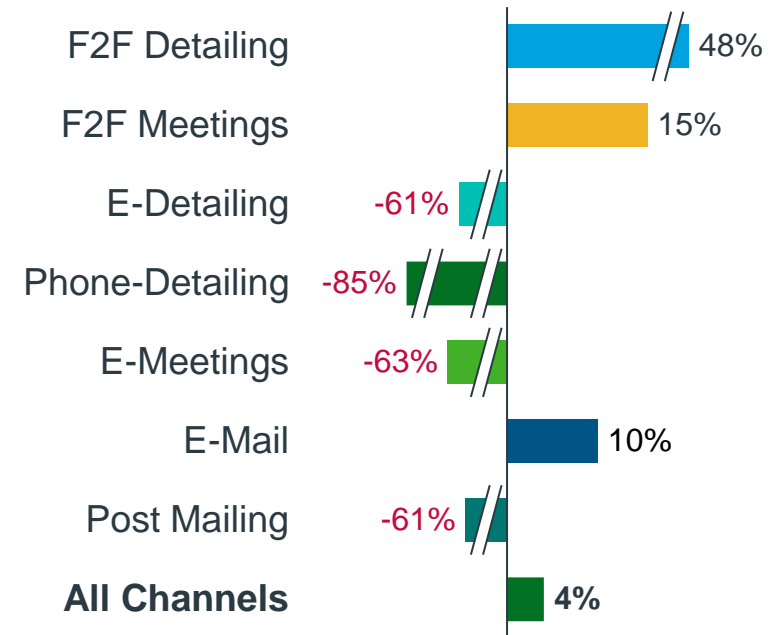
# Total Market overall promotional volume (contacts) increased by 4%, January-July 2021 vs 2020



Promotional value in Rub share by channel



% Changes in promotional value in Rub by channel Jan-Jul 2021 vs 2020

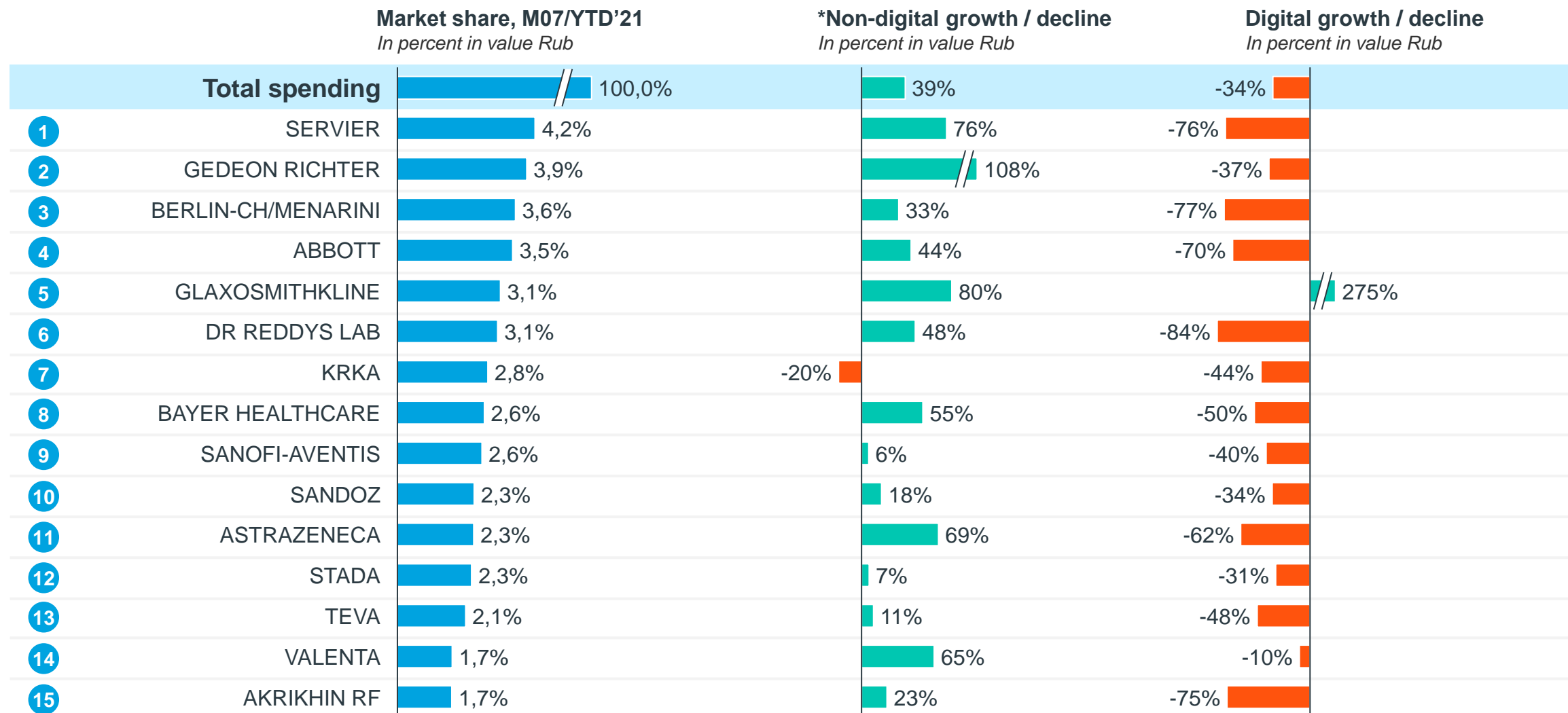


**F2F Detailing** – Reps visits. **Traditional others:** 1) F2F meetings – group meetings, round tables etc, 2) Phone Detailing – phone calls, 3) E-mail – communication via email. 4) Post Mailing – paper mails. **Digital:** 1) E-detailing – 1-1 calls visits using digitabl platforms 2) E-meetings – group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

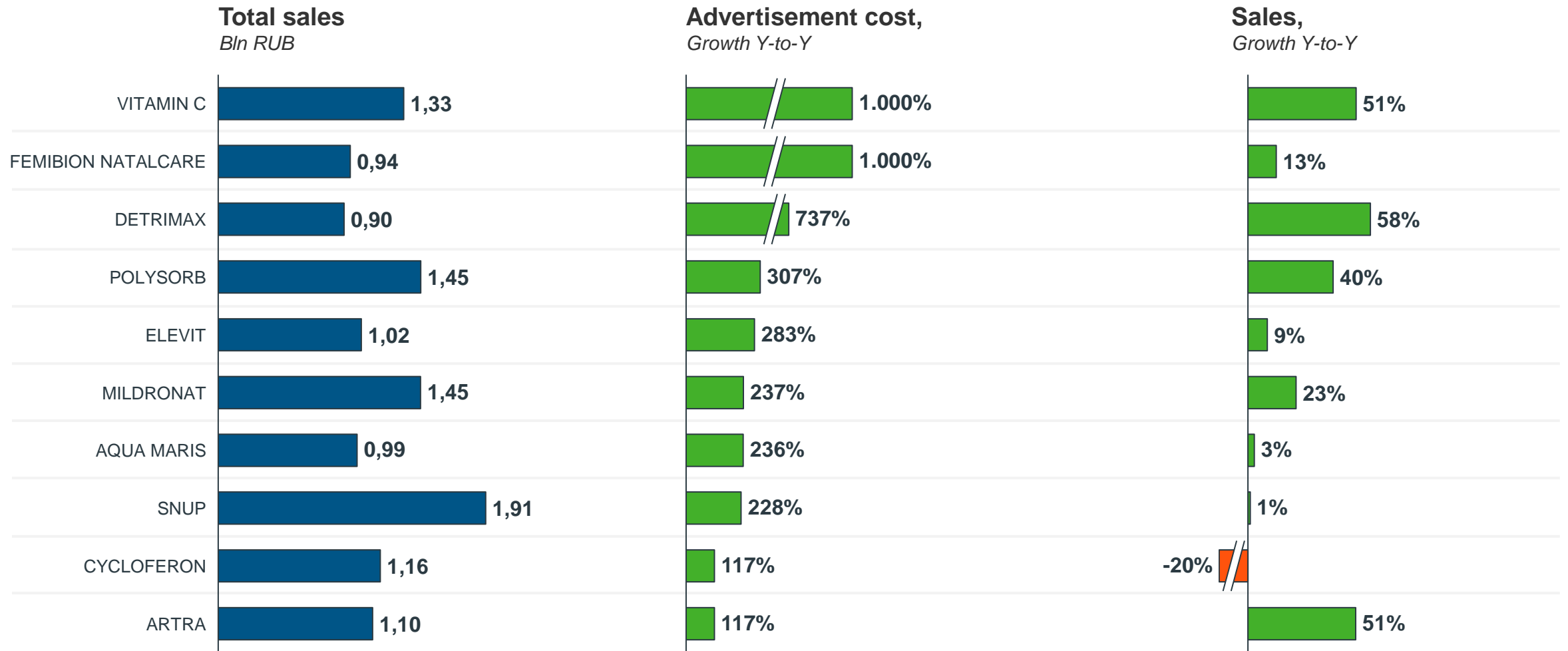
# TOP-15 corporations on promotional value in Rub, January-July 2021



\*Non-digital: F2F Detailing + Traditional others.

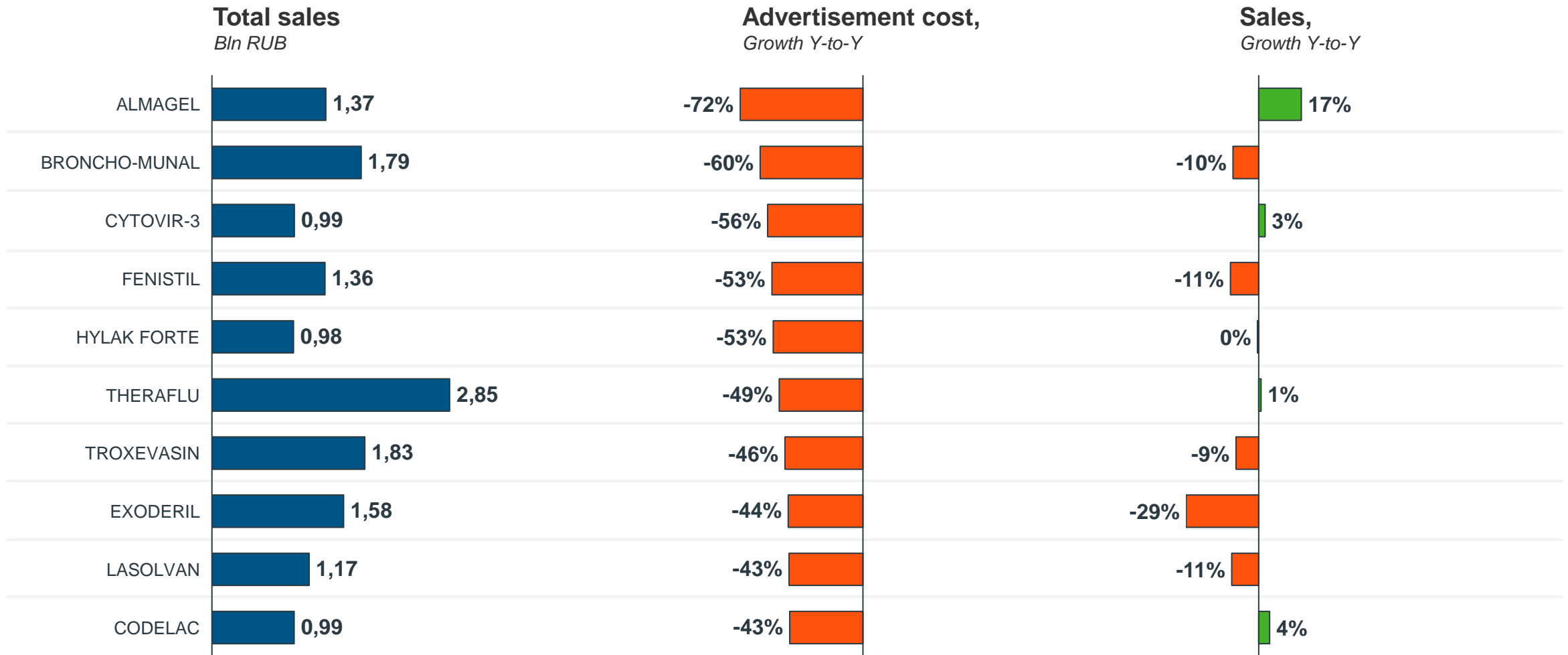
Source: IQVIA Russia, Channel Dynamics promo évaluation; Specialties: Allergology/Pulmonology, Cardiology, Dermatology, Diabetes, E.N.T., Gastroenterology, GPs, Gynecology, Neurology, Oncology, Pediatric, Pharma, Psychotherapy, Urology.

# TOP-10 products by growth in advertisement investments in January-July 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 January-July 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



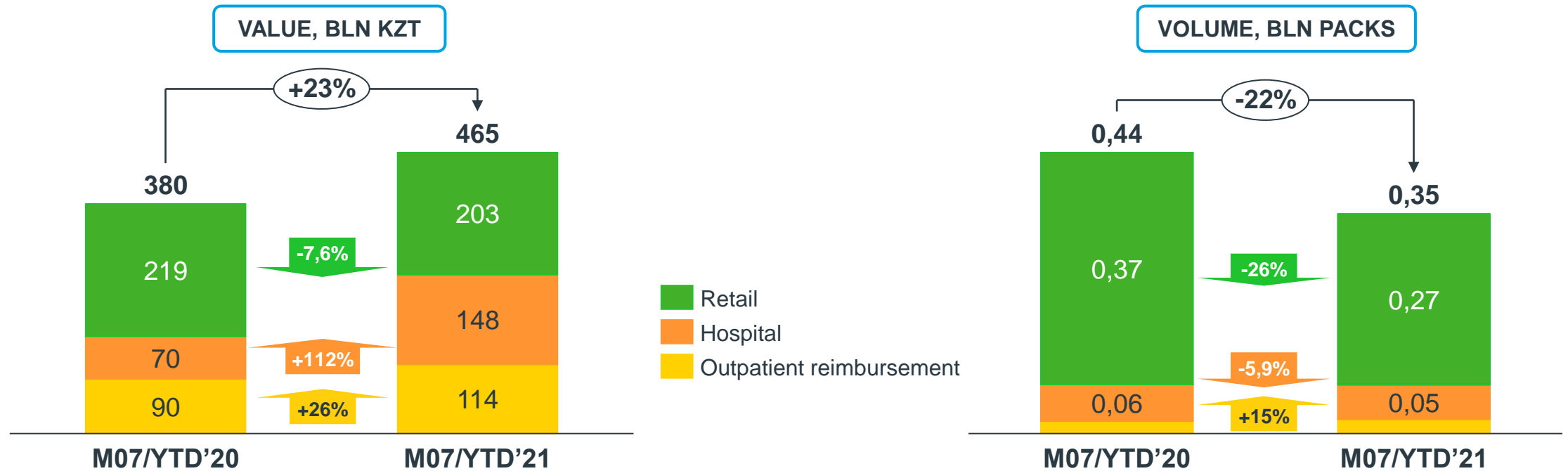
8,4%



INFLATION

# Kazakhstan pharma market growth in January-July 2021

Market grew by 23% in value and decreased by 22% in volume

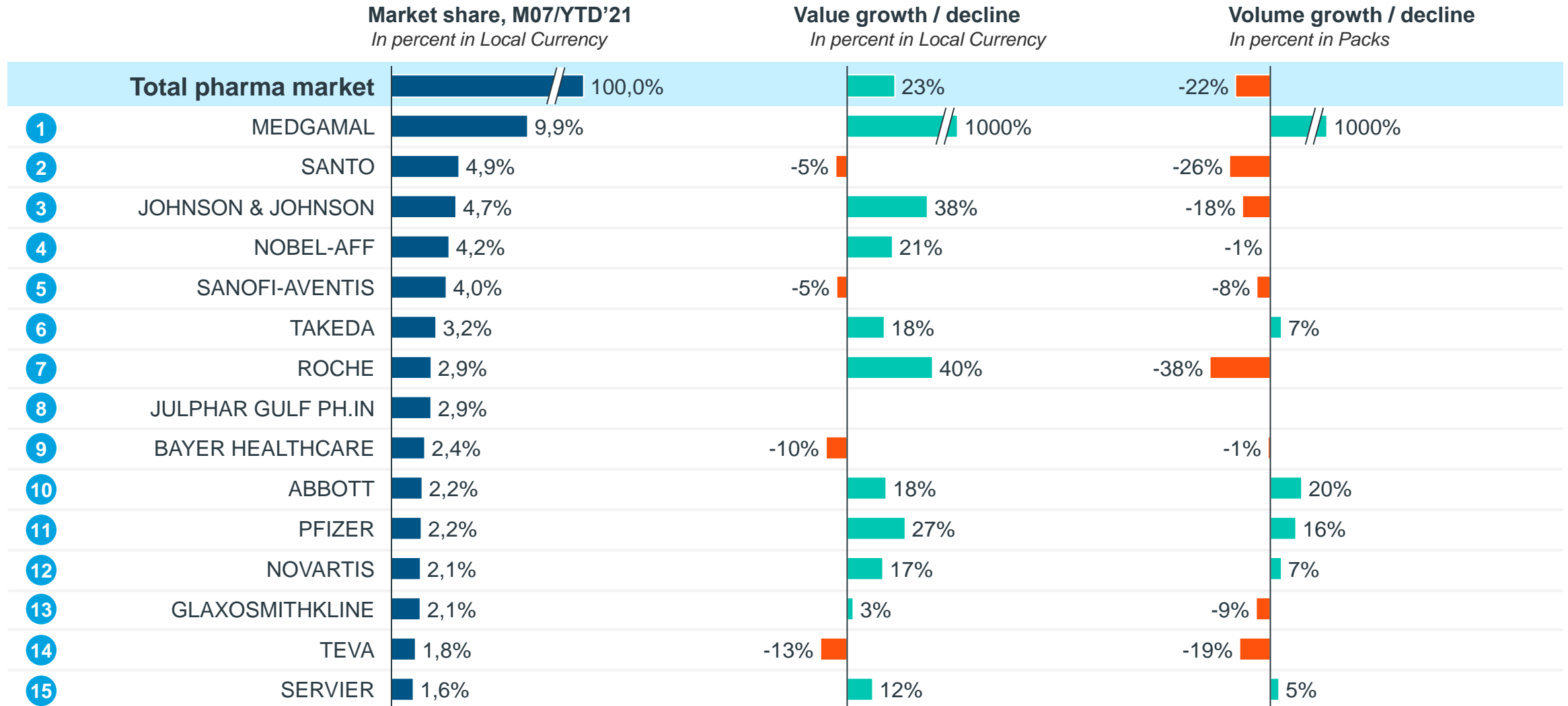


Indicator	KZT	USD	EUR	PACKS
Value M07/YTD'21, Bln.	465	1,10	0,92	0,35
Growth M07/YTD'21, %	▲ 23%	▲ 17%	▲ 8,2%	▼ -22%

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



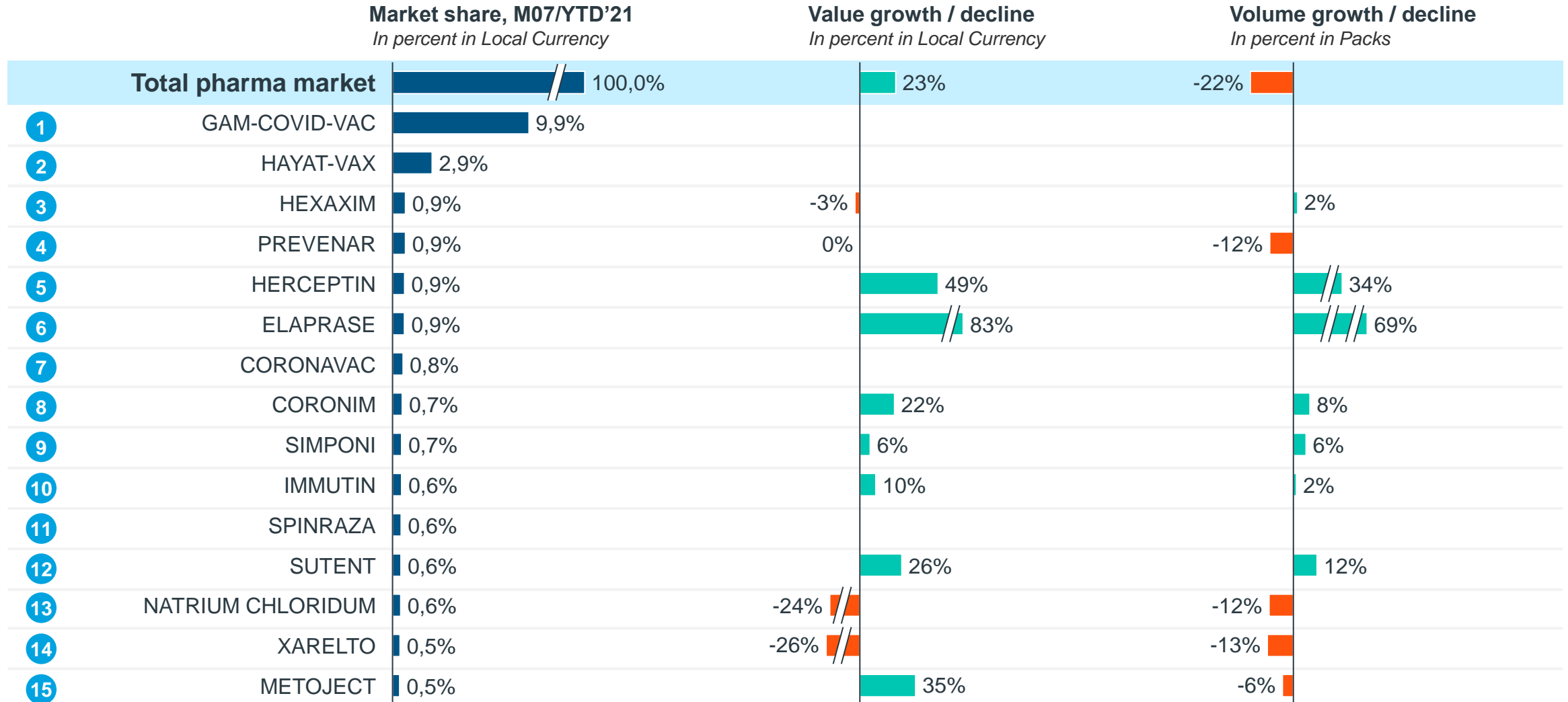
# TOP-15 corporations on Kazakhstan market, January-July 2021



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



# TOP-15 brands on Kazakhstan market, January-July 2021





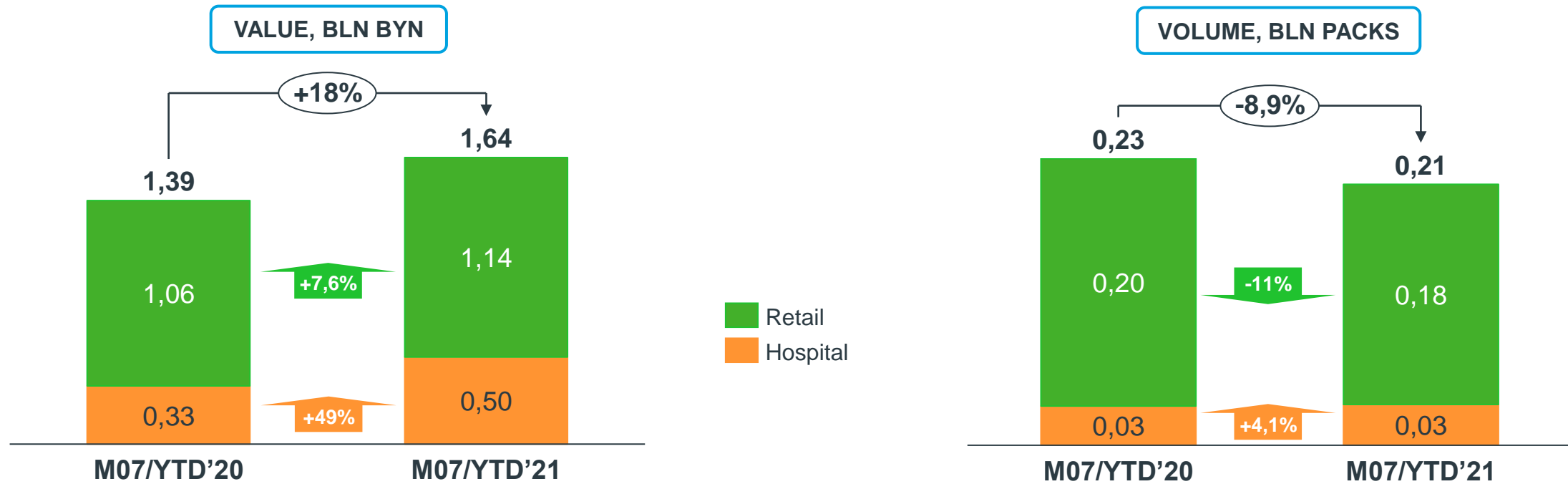
9,8%



INFLATION

# Belarus pharma market growth in January-July 2021

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



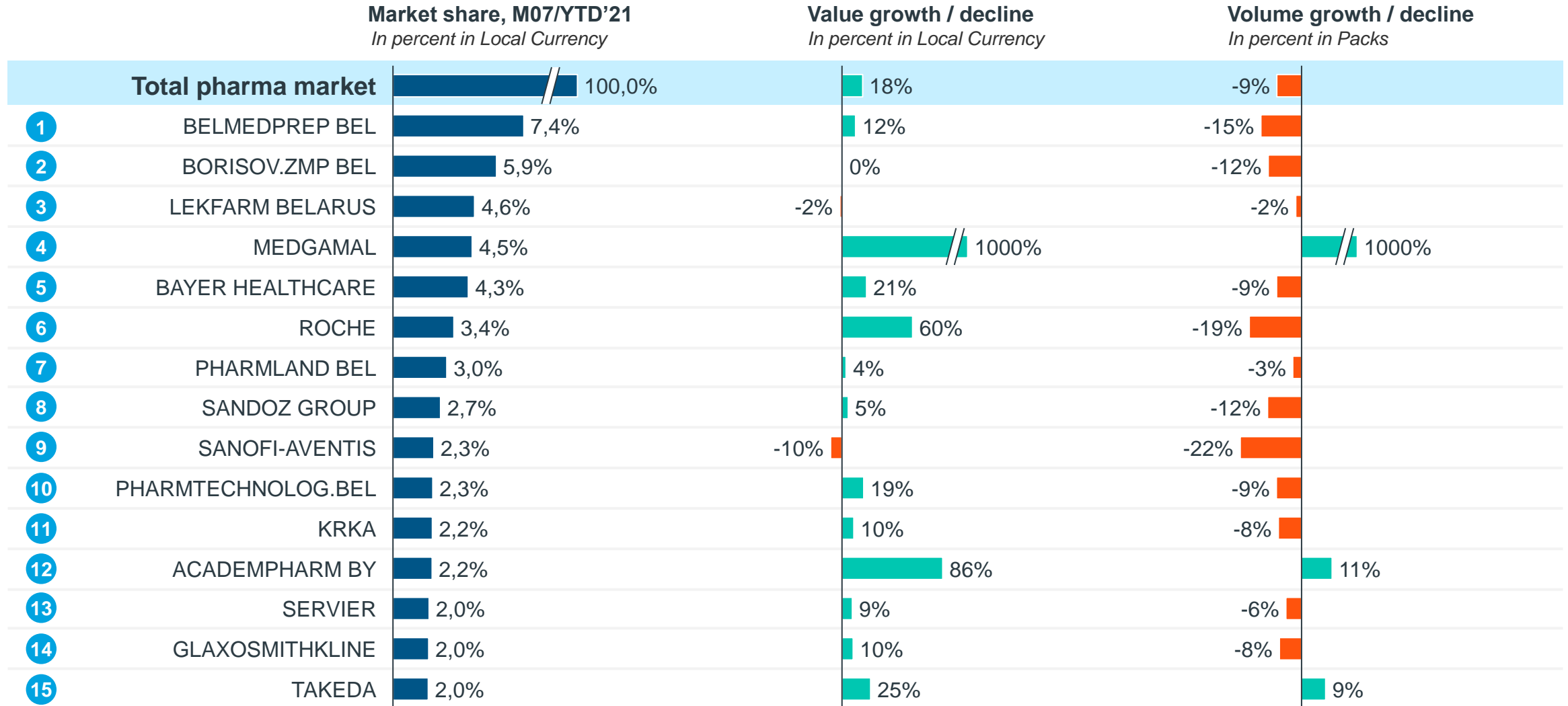
Indicator	BYN	USD	EUR	PACKS
Value M07/YTD'21, Bln.	1,64	0,64	0,53	0,21
Growth M07/YTD'21, %	▲ 18%	▲ 7,7%	▼ -0,9%	▼ -8,9%

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





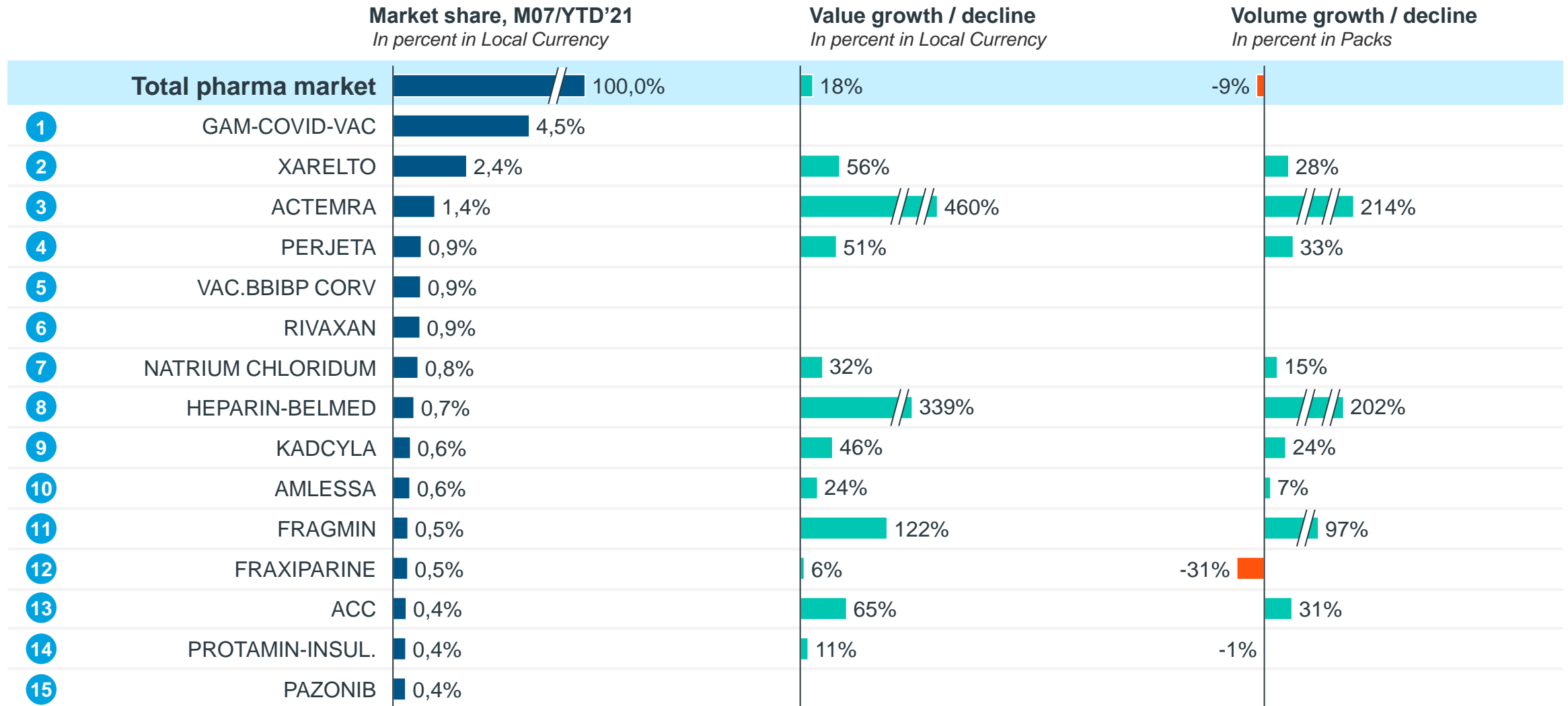
# TOP-15 corporations on Belarus market, January-July 2021



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



# TOP-15 brands on Belarus market, January-July 2021





11,1%



INFLATION

# Uzbekistan pharma market growth in January-July 2021

Market grew by 77% in value and by 38% in volume



Indicator	UZS	USD	EUR	PACKS
Value M07/YTD'21, Bln.	9 612	0,91	0,76	0,52
Growth M07/YTD'21, %	▲ 77%	▲ 65%	▲ 51%	▲ 38%



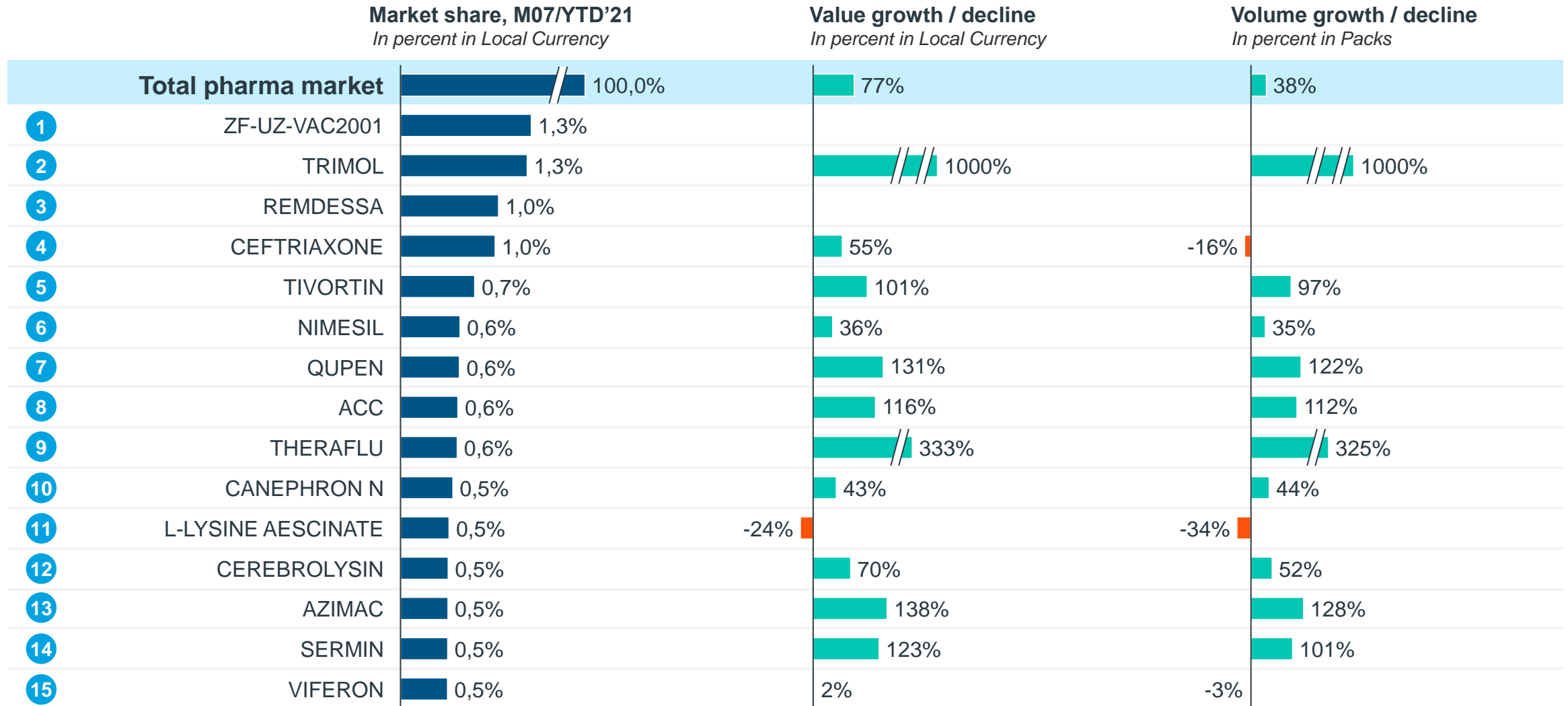
# TOP-15 corporations on Uzbekistan market, January-July 2021

		Market share, M07/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>
<b>Total pharma market</b>		100,0%	77%	38%
1	KRKA	3,2%	65%	59%
2	MENARINI	2,7%	12%	-6%
3	SANOFI-AVENTIS	2,6%	60%	46%
4	NOVARTIS	2,5%	39%	14%
5	FARMAK KIEV	2,3%	45%	16%
6	ZHURABEK LAB	2,3%	63%	-17%
7	WORLD MEDICINE	2,2%	167%	150%
8	GM PHARMACEUTICALS	1,9%	81%	70%
9	YURIA-FARM UKR	1,8%	43%	24%
10	ABBOTT	1,7%	16%	11%
11	STADA	1,5%	38%	25%
12	GEDEON RICHTER	1,5%	6%	0%
13	AJANTA PHARMA IND	1,5%	757%	685%
14	NIKA-PHARM	1,5%	61%	11%
15	AVISON PHARM.	1,5%	178%	134%

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-July 2021





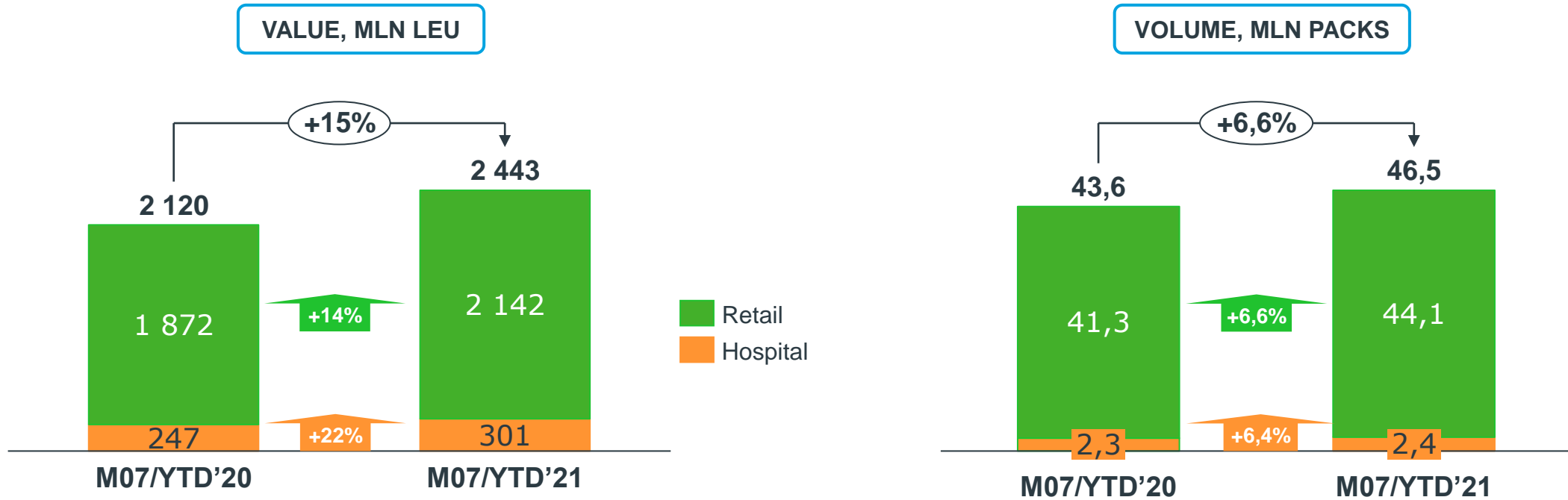
3,5%



INFLATION

# Moldova pharma market growth in January-July 2021

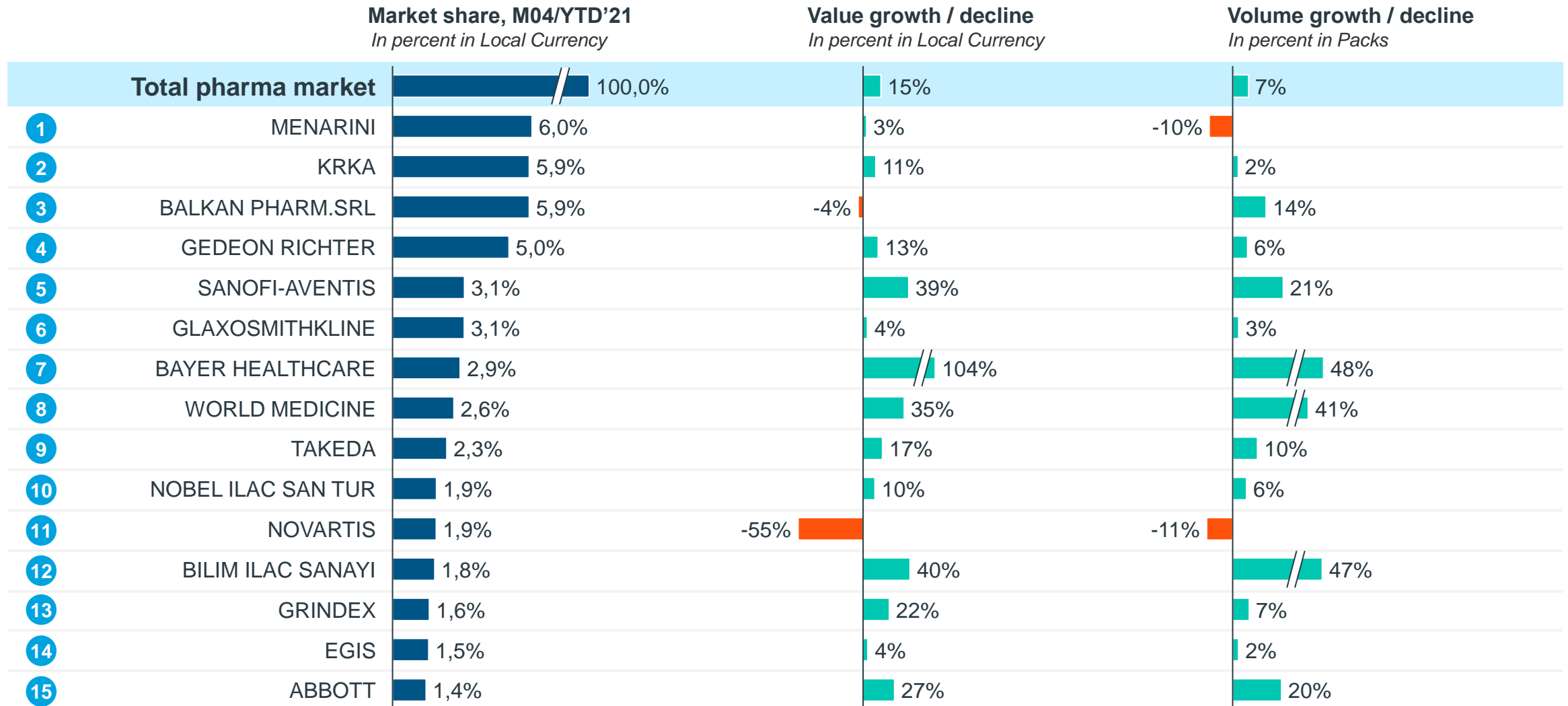
Market grew by 15% in value and by 6,6% in volume



Indicator	LEU	USD	EUR	PACKS
Value M07/YTD'21, Bln.	2 443	137,9	114,8	46,5
Growth M07/YTD'21, %	▲ 15%	▲ 14%	▲ 5,4%	▲ 6,6%

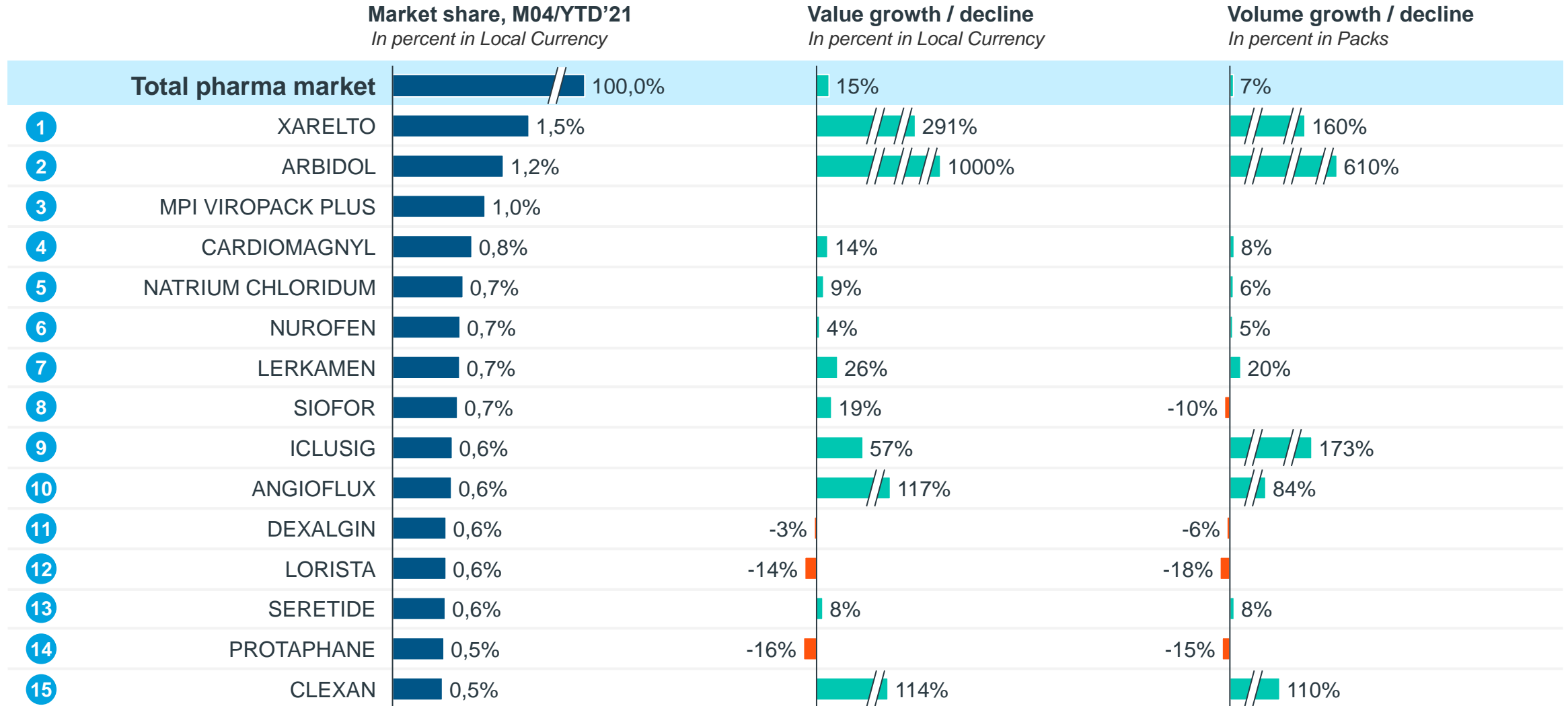


# TOP-15 corporations on Moldova market, January-July 2021





# TOP-15 brands on Moldova market, January-July 2021



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



# CONTACT US

## **Anton Kalyapin**

*Director, Offering and Supplier Relations*

 Anton.Kalyapin@IQVIA.com

 +7 499 272 05 00

---

## **Svetlana Nikulina**

*Sales Director Russia and CIS*

 Svetlana.Nikulina@IQVIA.com

 +7 499 272 05 00

---

## **Bakhtiar Tinibaev**

*Supplier Services Analyst*

 Bakhtiar.Tinibaev@IQVIA.com

 +7 499 272 05 00