

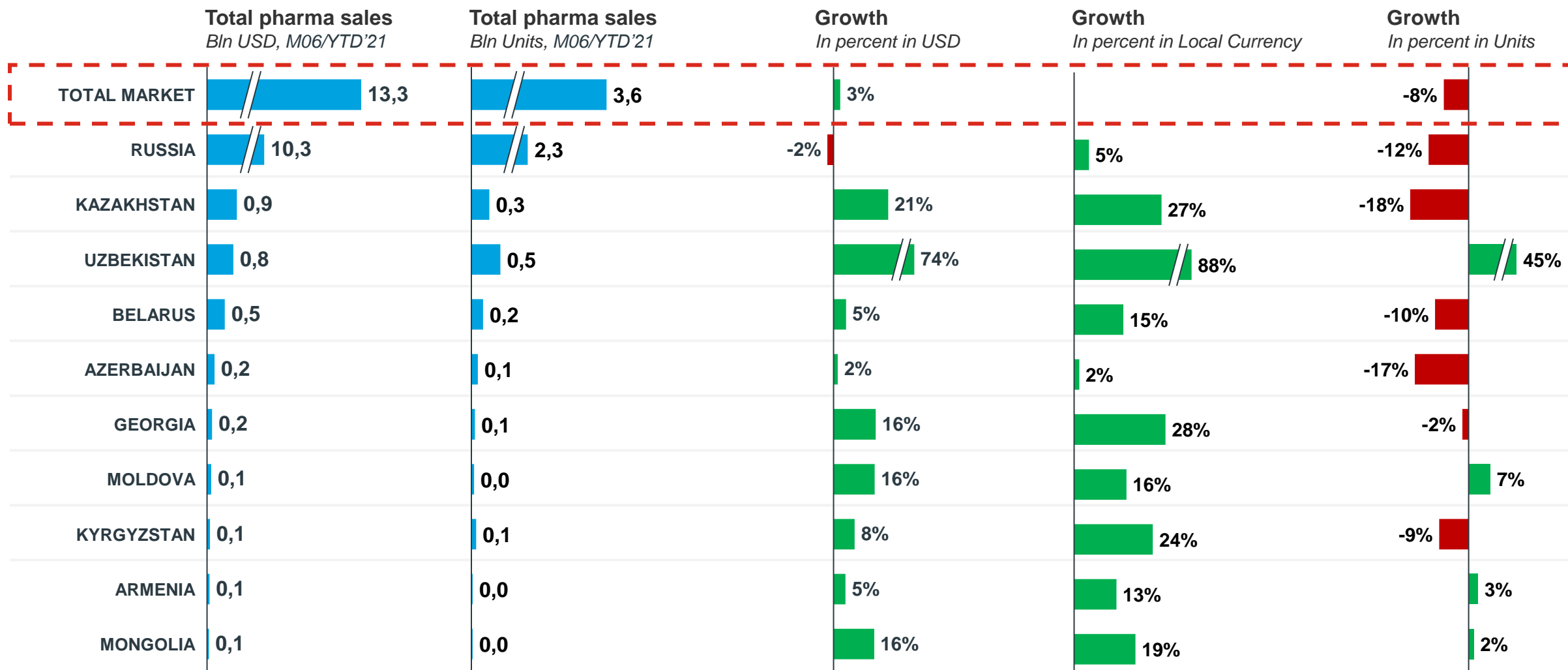


# Facts from IQVIA

M06 2021

# EAEU & CIS, Russia Countries ranking in January-June 2021, Total market, Value in Bln. USD and Units

Total Market grew by 3% in USD and declined by 8% in volume



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



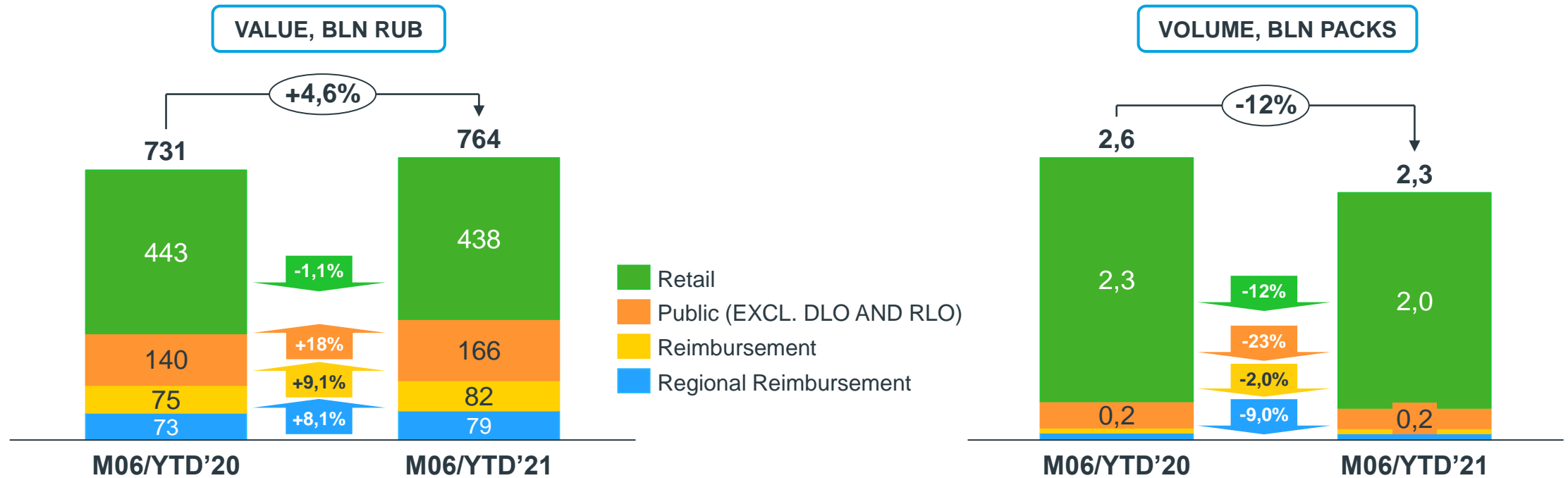
6,5%



INFLATION

# Russian pharma market growth in January-June 2021

Market grew by 4,6% in value and decreased by 12% in volume



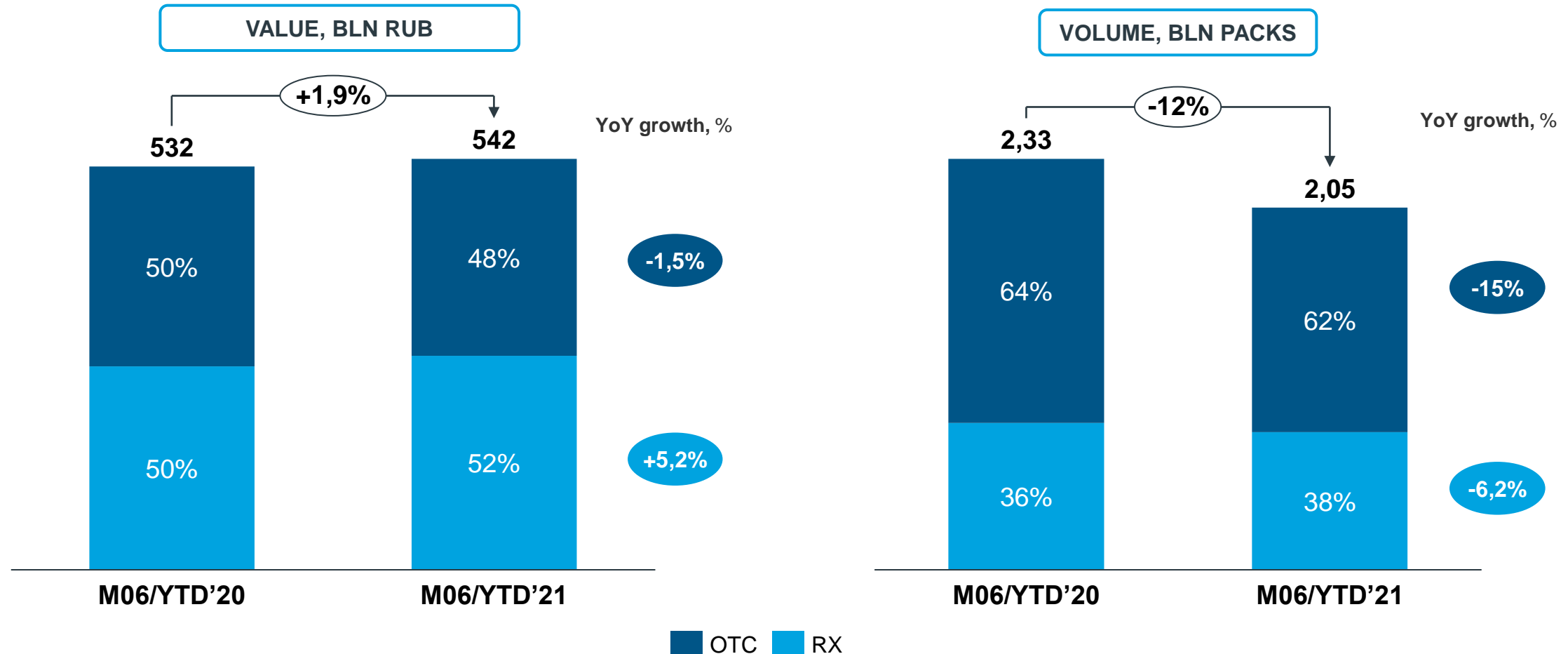
Indicator	RUB	USD	EUR	PACKS
Value M06/YTD'21, Bln.	764	10,3	8,5	2,3
Growth M06/YTD'21, %	▲ 4,6%	▼ -2,3%	▼ -11%	▼ -12%

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



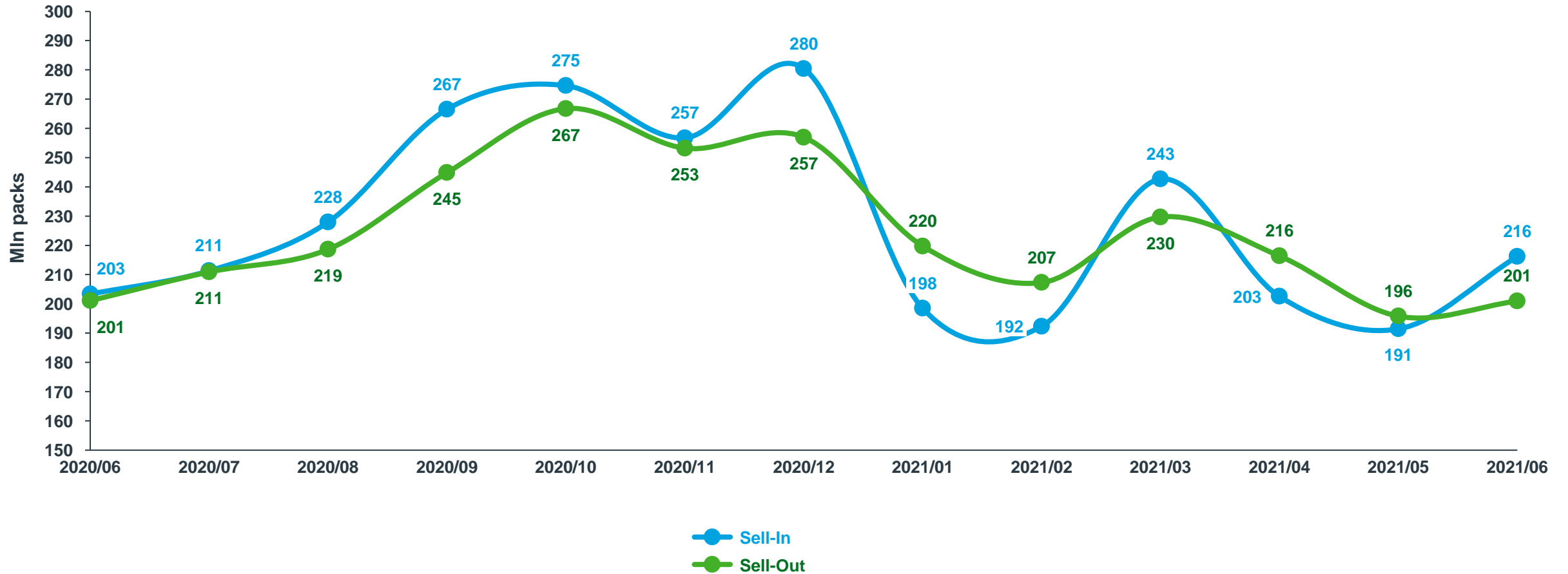
# Russian pharma market increase in January-June 2021

Retail Sell-Out: Market grew by 1,9% in value and dropped by 12% in volume



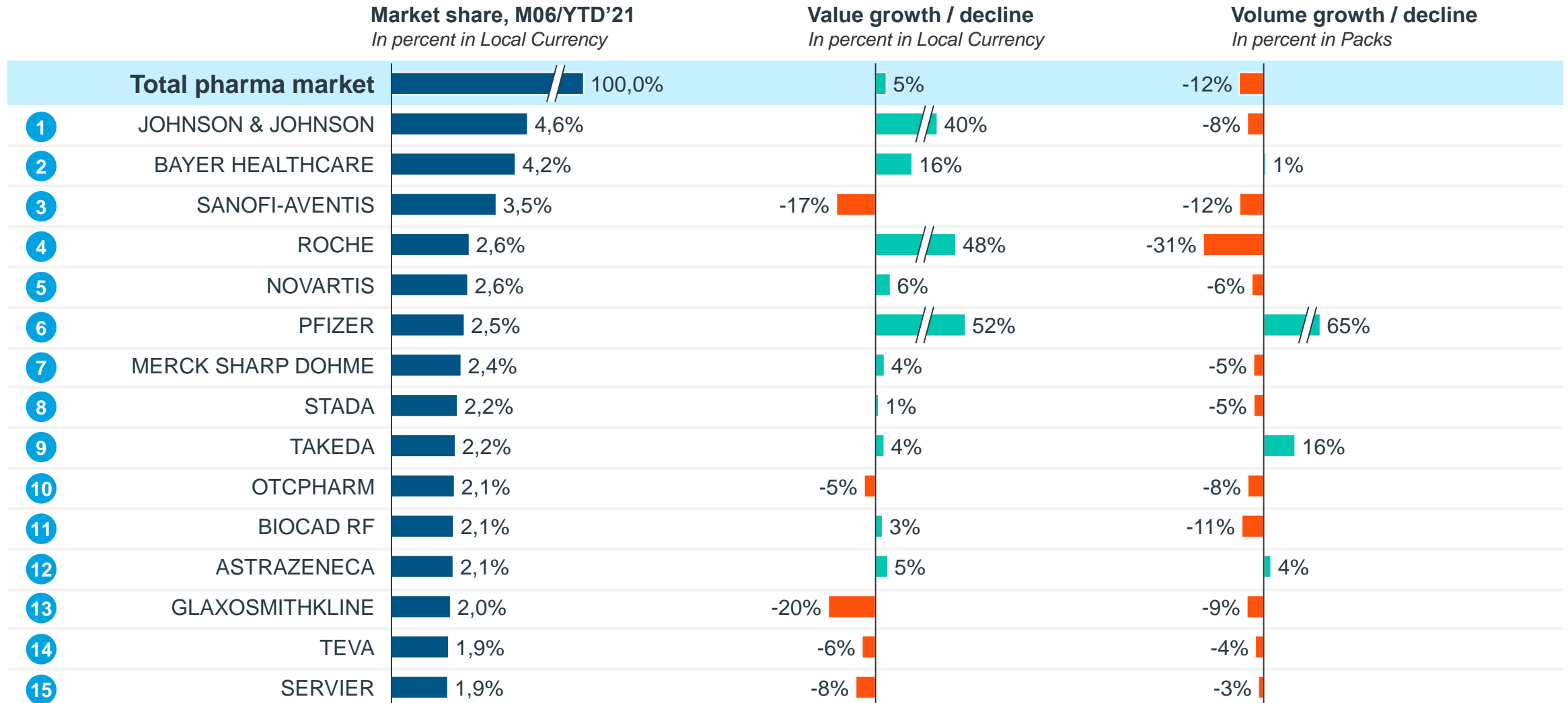


# Sell-In vs Sell-Out, OTC registered drugs





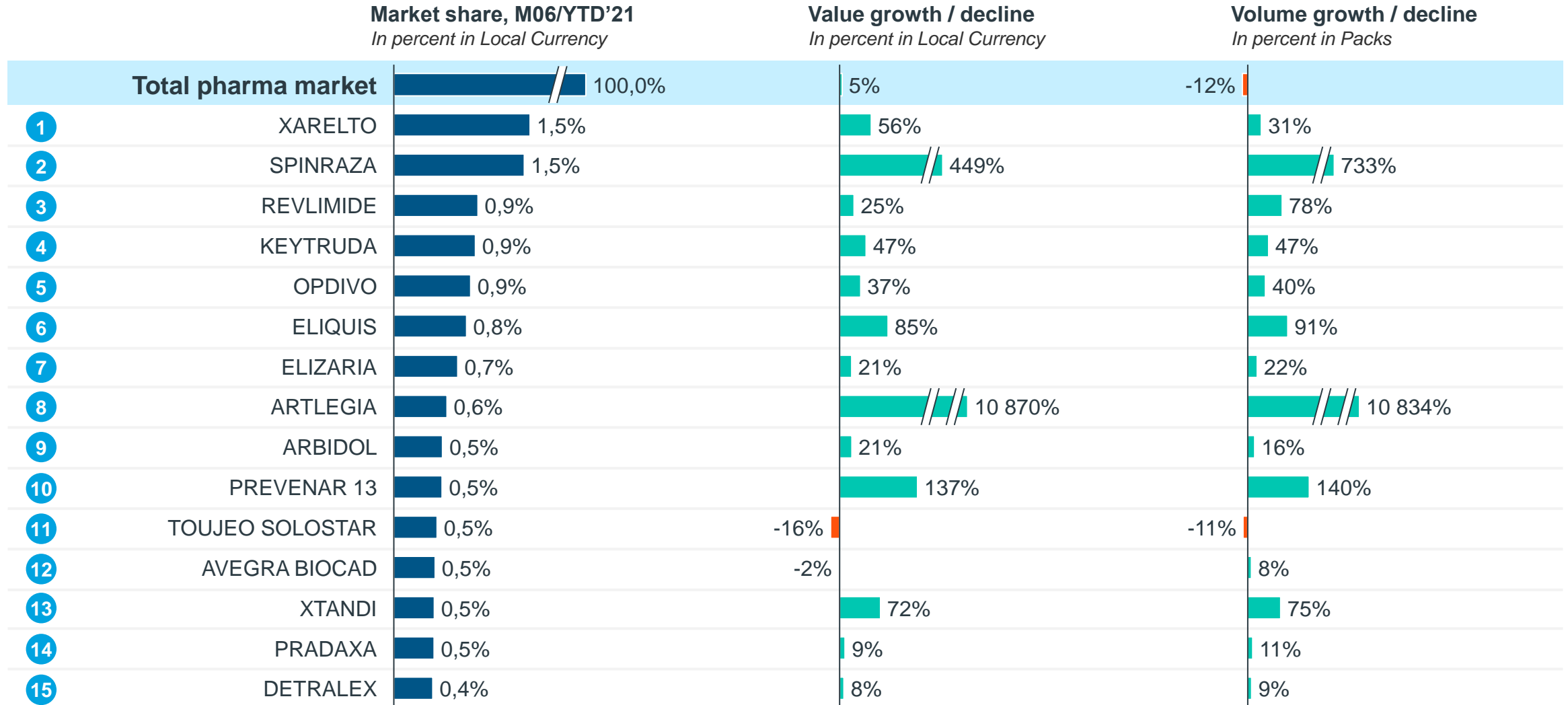
# TOP-15 corporations on Russian market, January-June 2021



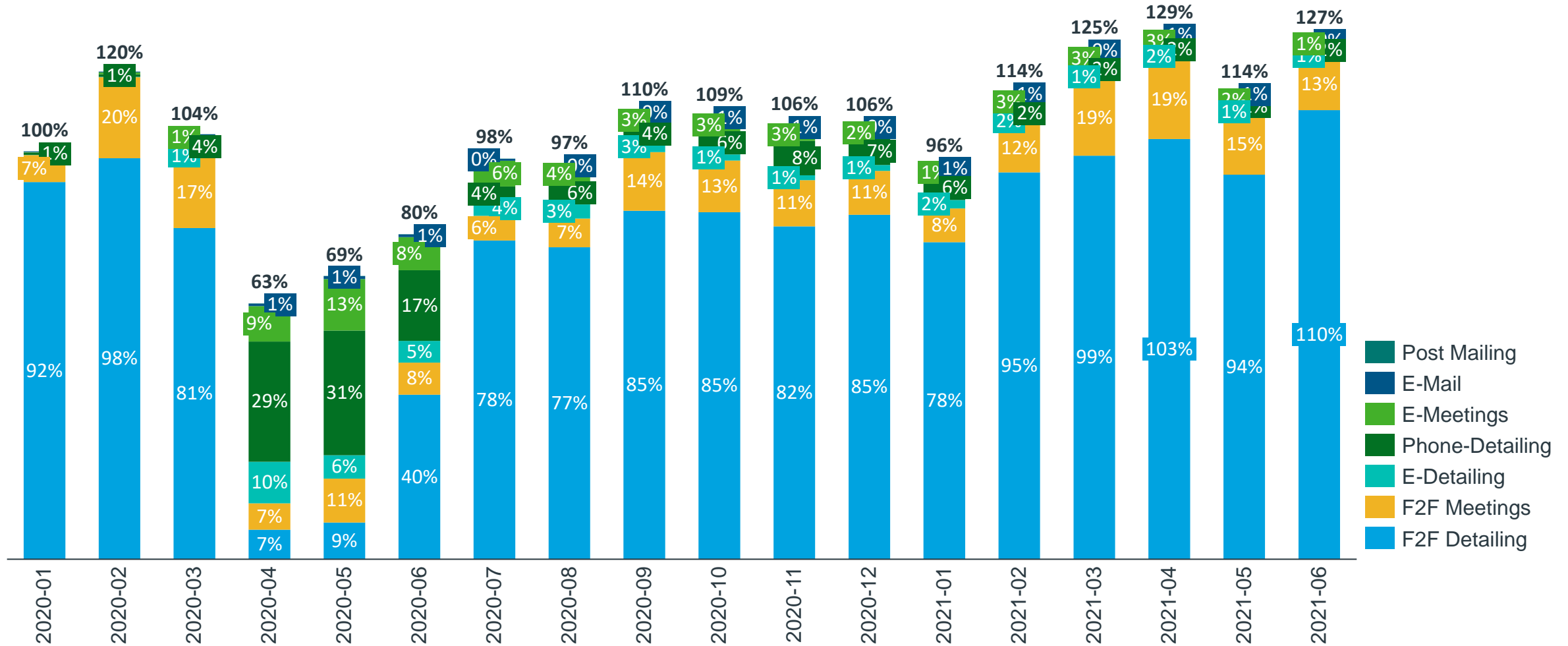
Source: IQVIA databases. Retail, Public, DLO, RLO (excluding food supplements and diagnostic agents), TRD Prices



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



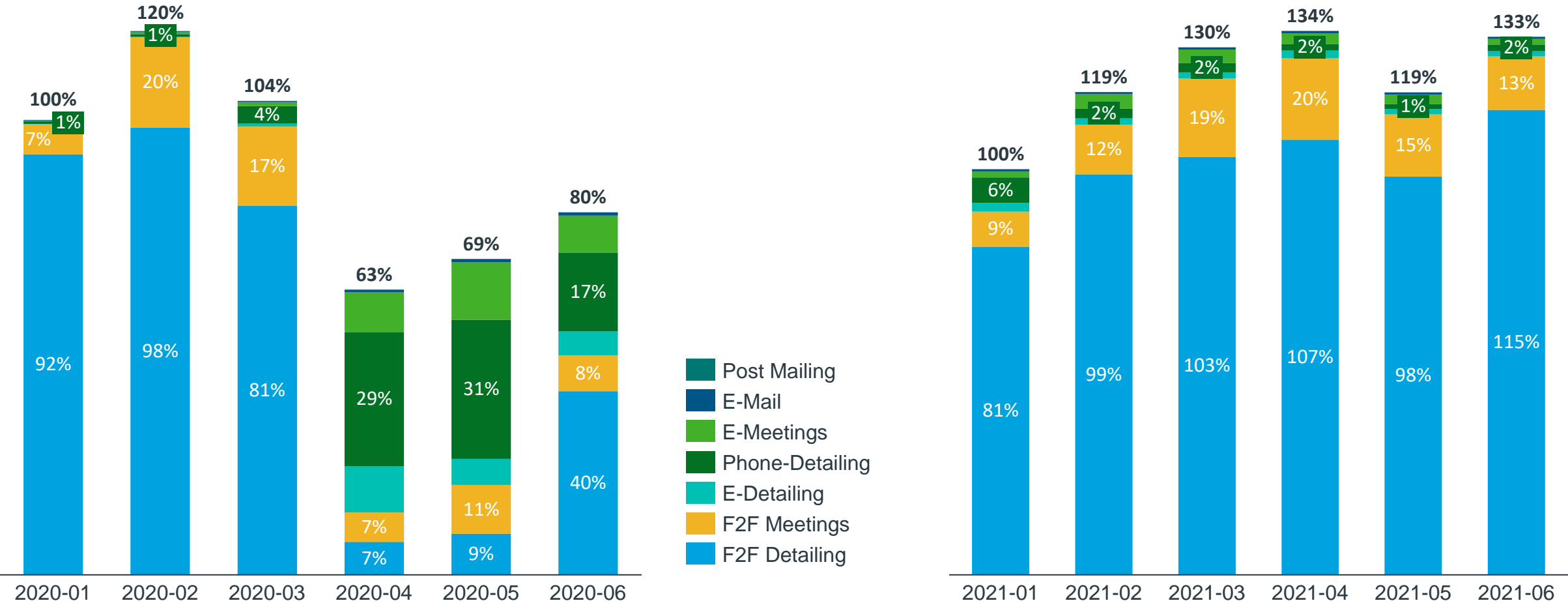
# Index of promotional interactions by channel in Russia, January 2020 - June 2021



Source: IQVIA Russia, Channel Dynamics promo evaluation. All months are measured relative to 2020-01 as a baseline



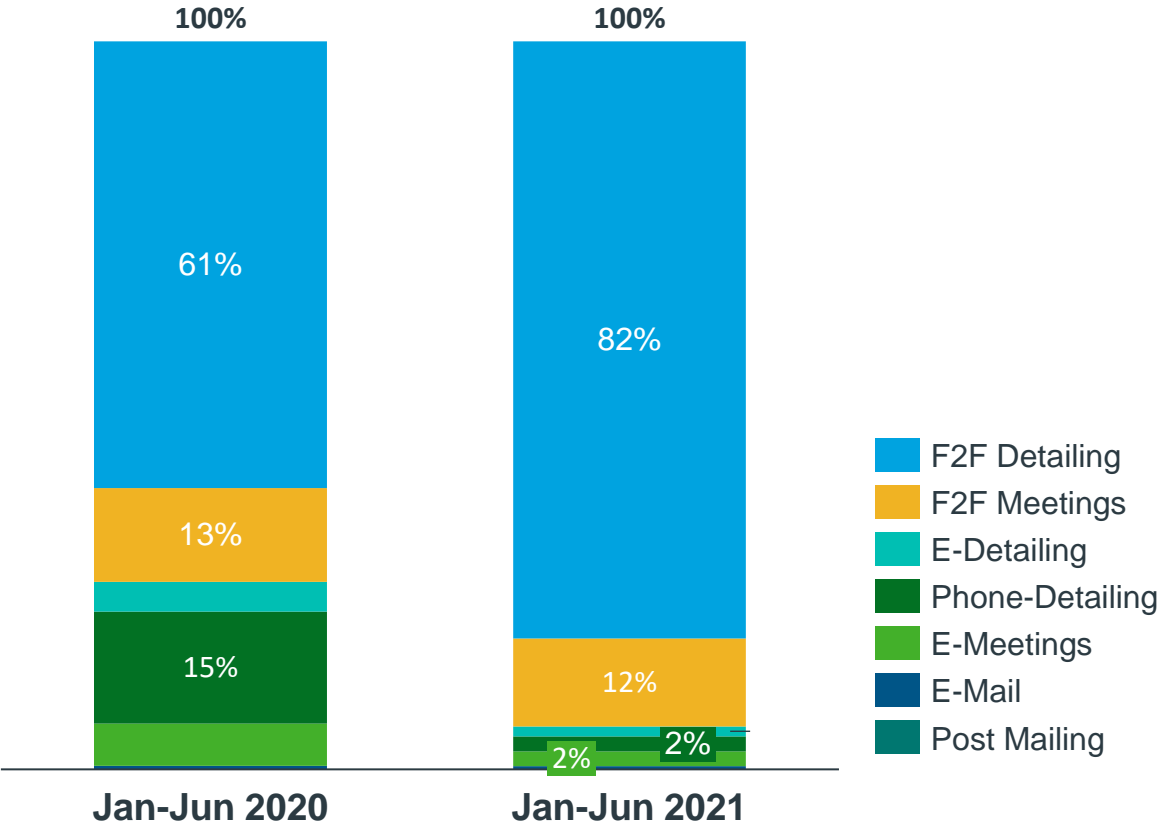
# Index of promotional interactions by channel in Russia, January - June 2020 & 2021



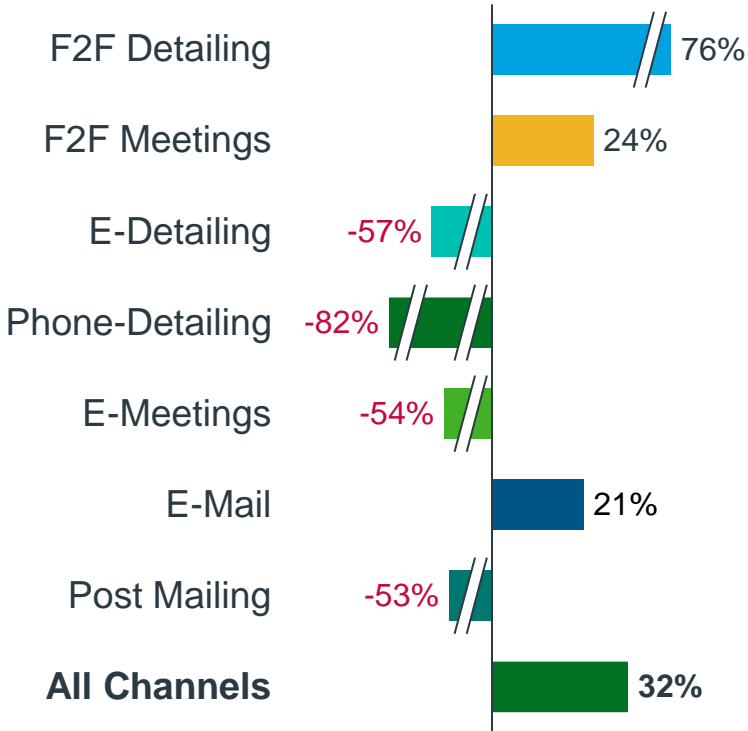
Source: IQVIA Russia, Channel Dynamics promo evaluation. 2020 is measured relative to 2020-01 as a baseline. 2021 is measured relative to 2021-01 as a baseline.

# Total Market overall promotional volume increased by 32%, Jan-Jun 2021 vs 2020

Promotional volume share by channel

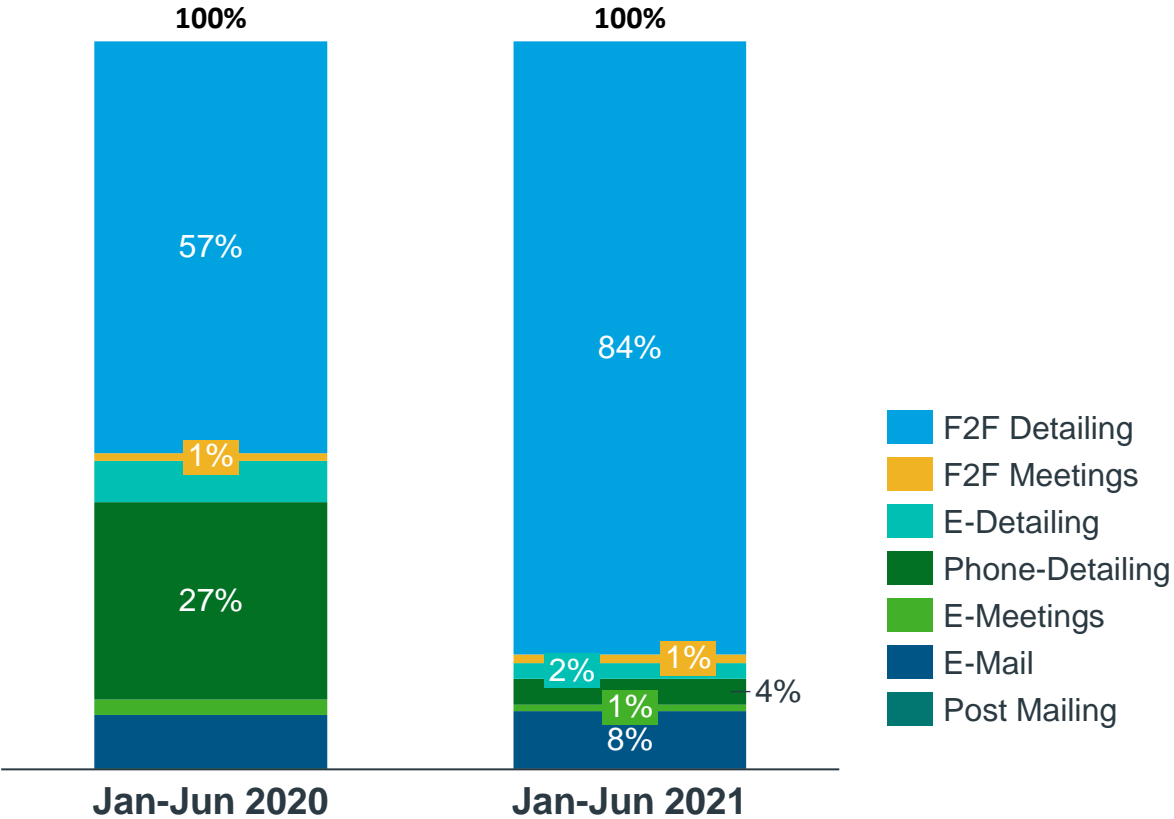


% Changes in promotional volume by channel Jan-Jun 2021 vs 2020

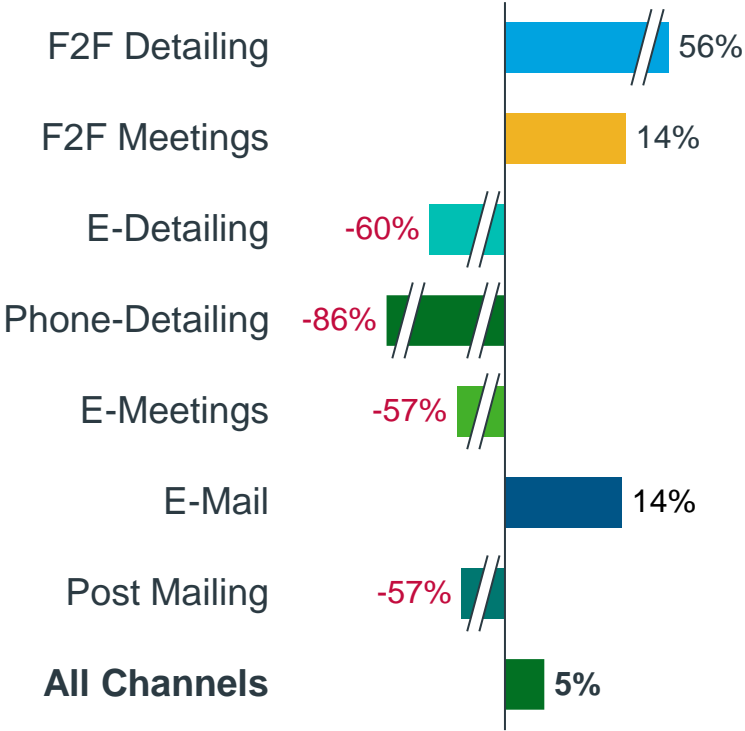


# Total Market overall promotional volume (contacts) increased by 5%, Jan-Jun 2021 vs 2020

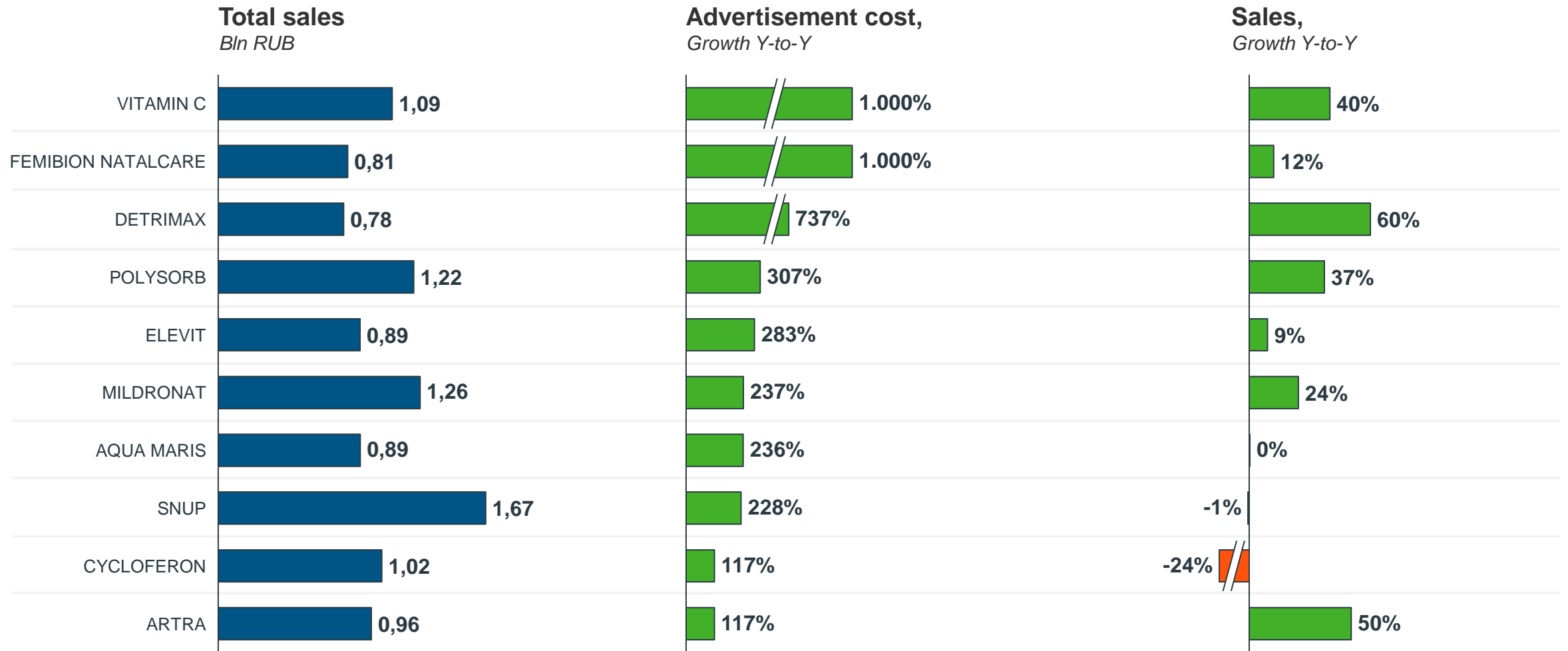
Promotional volume (contacts) share by channel



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

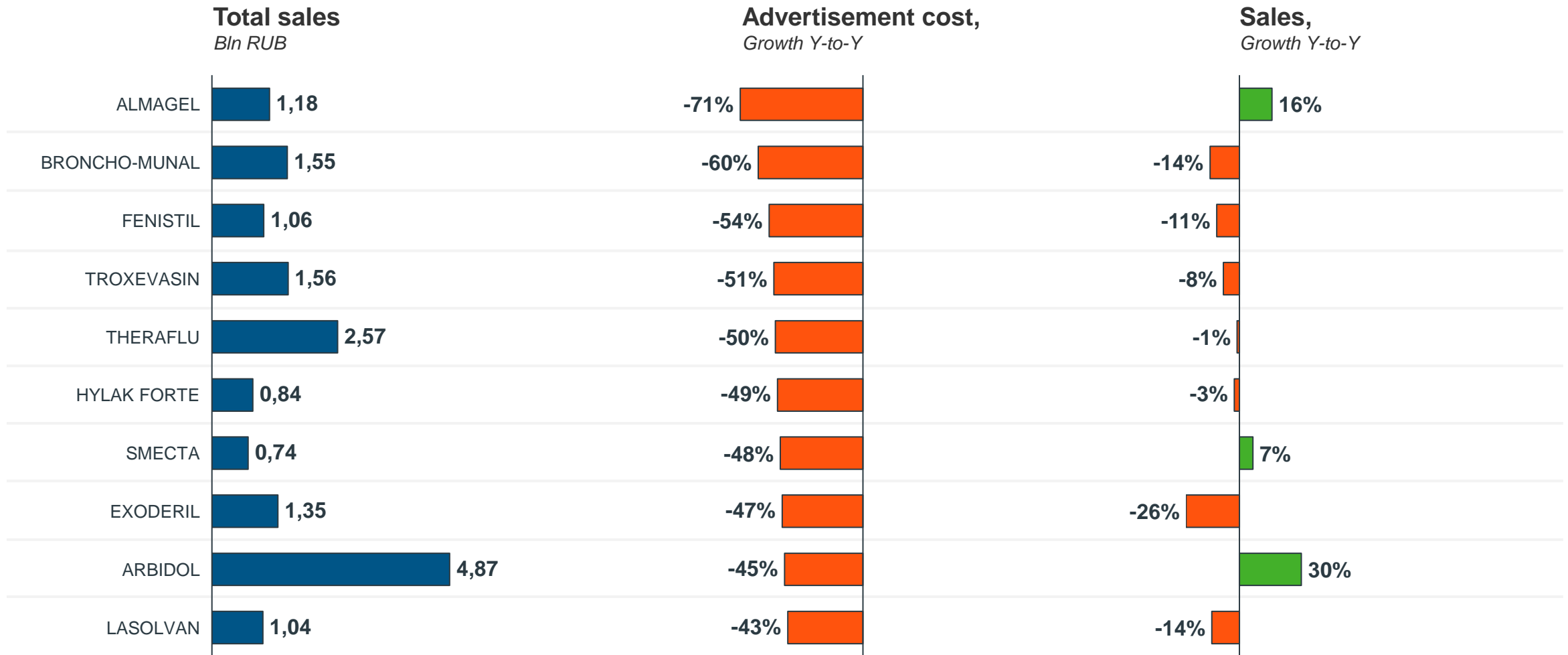


# TOP-10 products by growth in advertisement investments in January-June 2021



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-June 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



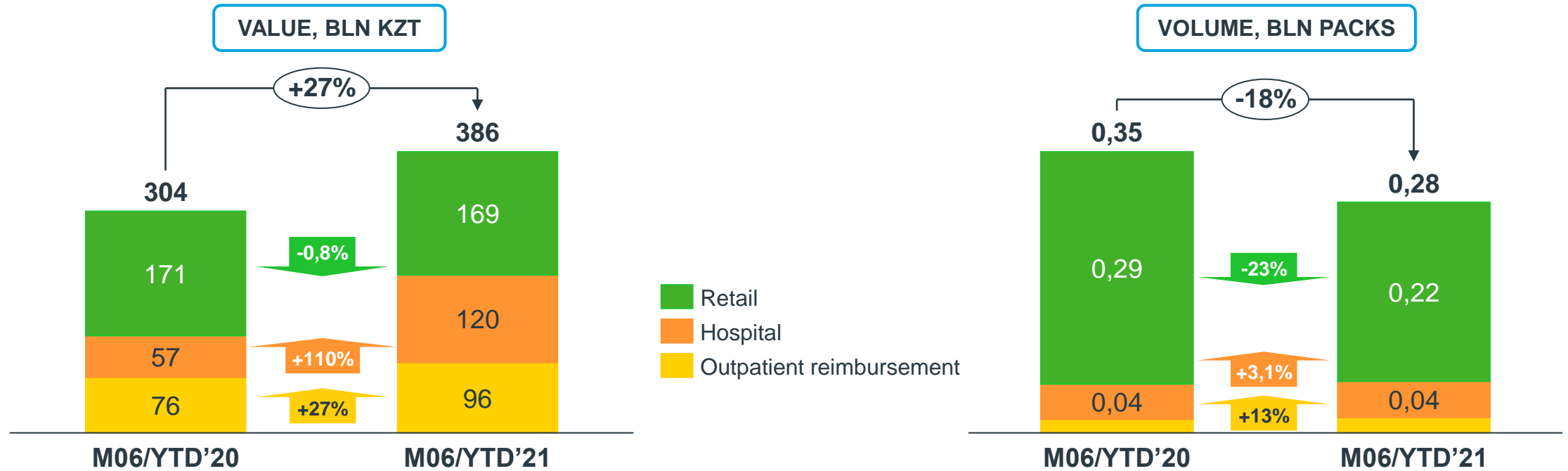
7,9%



INFLATION

# Kazakhstan pharma market growth in January-June 2021

Market grew by 27% in value and decreased by 18% in volume

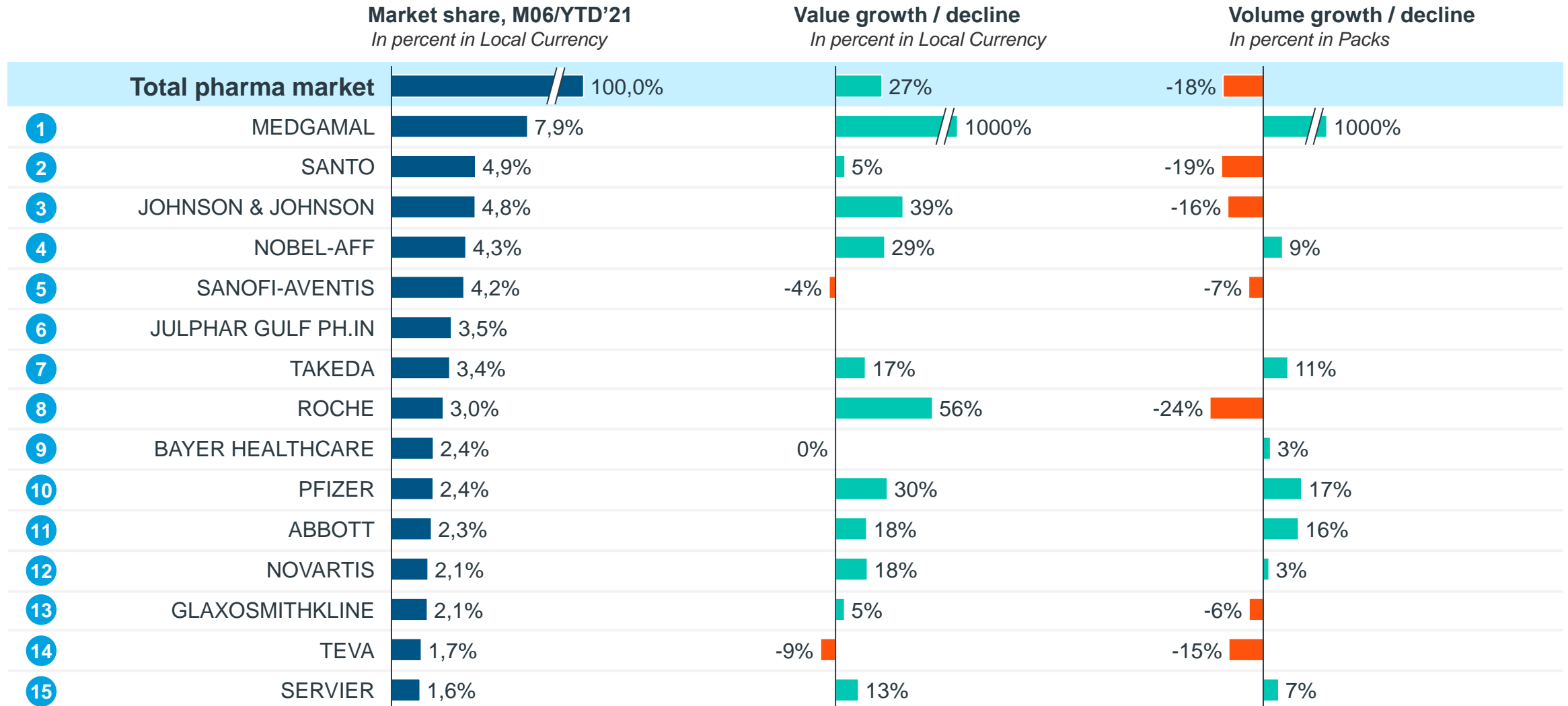


Indicator	KZT	USD	EUR	PACKS
Value M06/YTD'21, Bln.	386	0,91	0,76	0,28
Growth M06/YTD'21, %	▲ 27%	▲ 21%	▲ 11%	▼ -18%

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



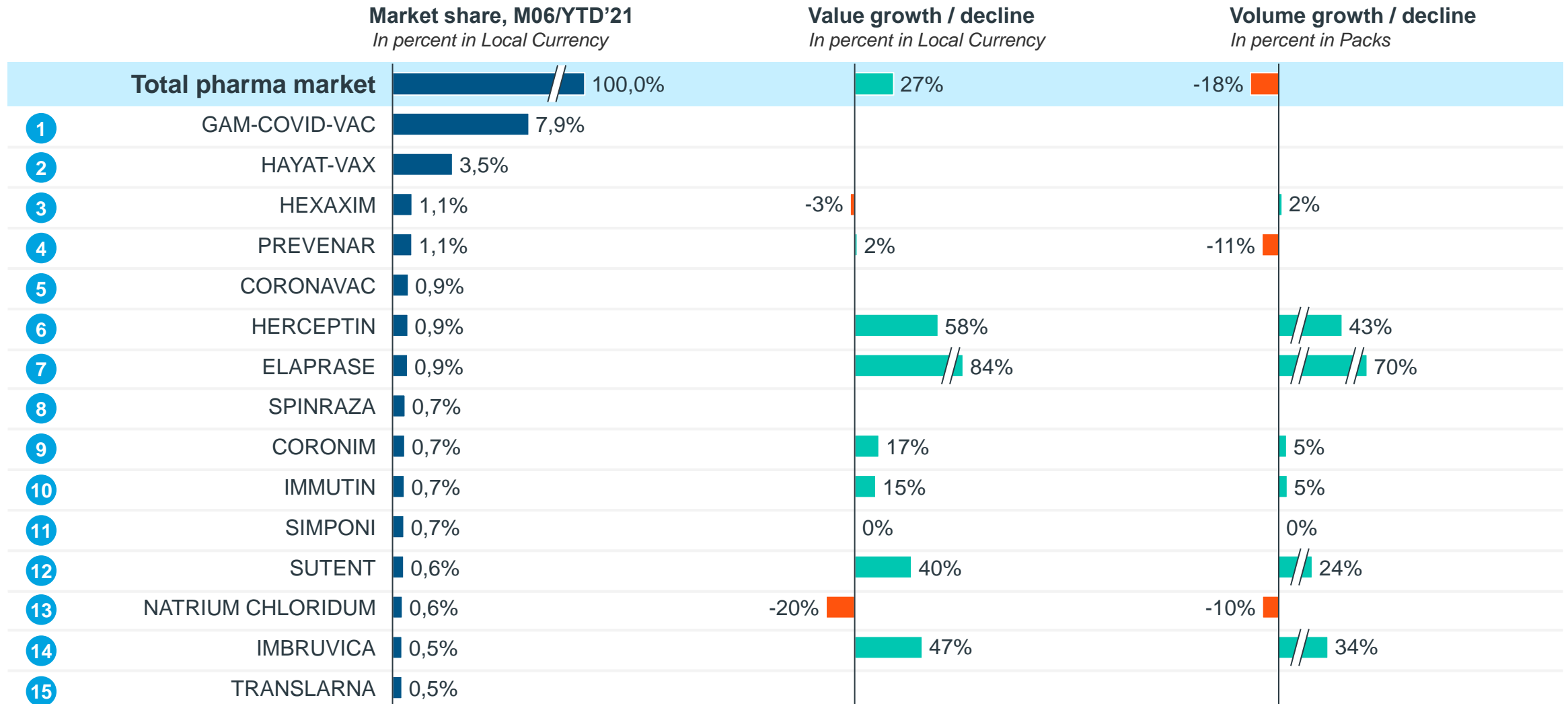
# TOP-15 corporations on Kazakhstan market, January-June 2021



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



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



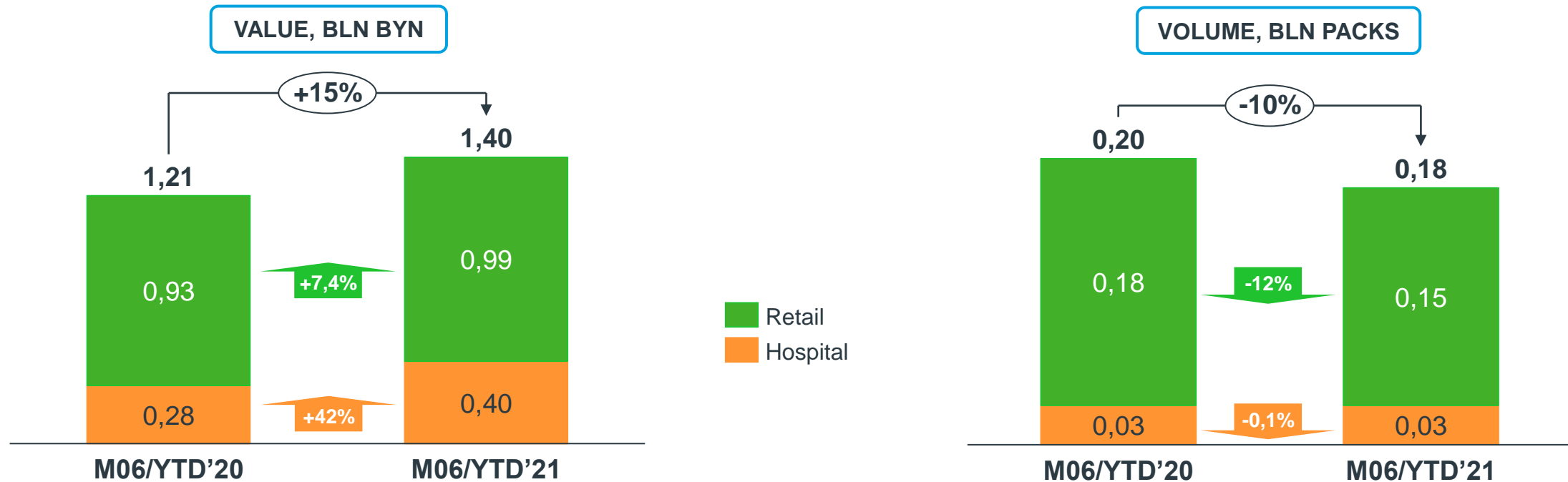




9,9%  
INFLATION

# Belarus pharma market growth in January-June 2021

Market grew by 15% in value and decreased by 10% in volume



Indicator	BYN	USD	EUR	PACKS
Value M06/YTD'21, Bln.	1,40	0,54	0,45	0,18
Growth M06/YTD'21, %	▲ 15%	▲ 5,1%	▼ -4,0%	▼ -10%

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

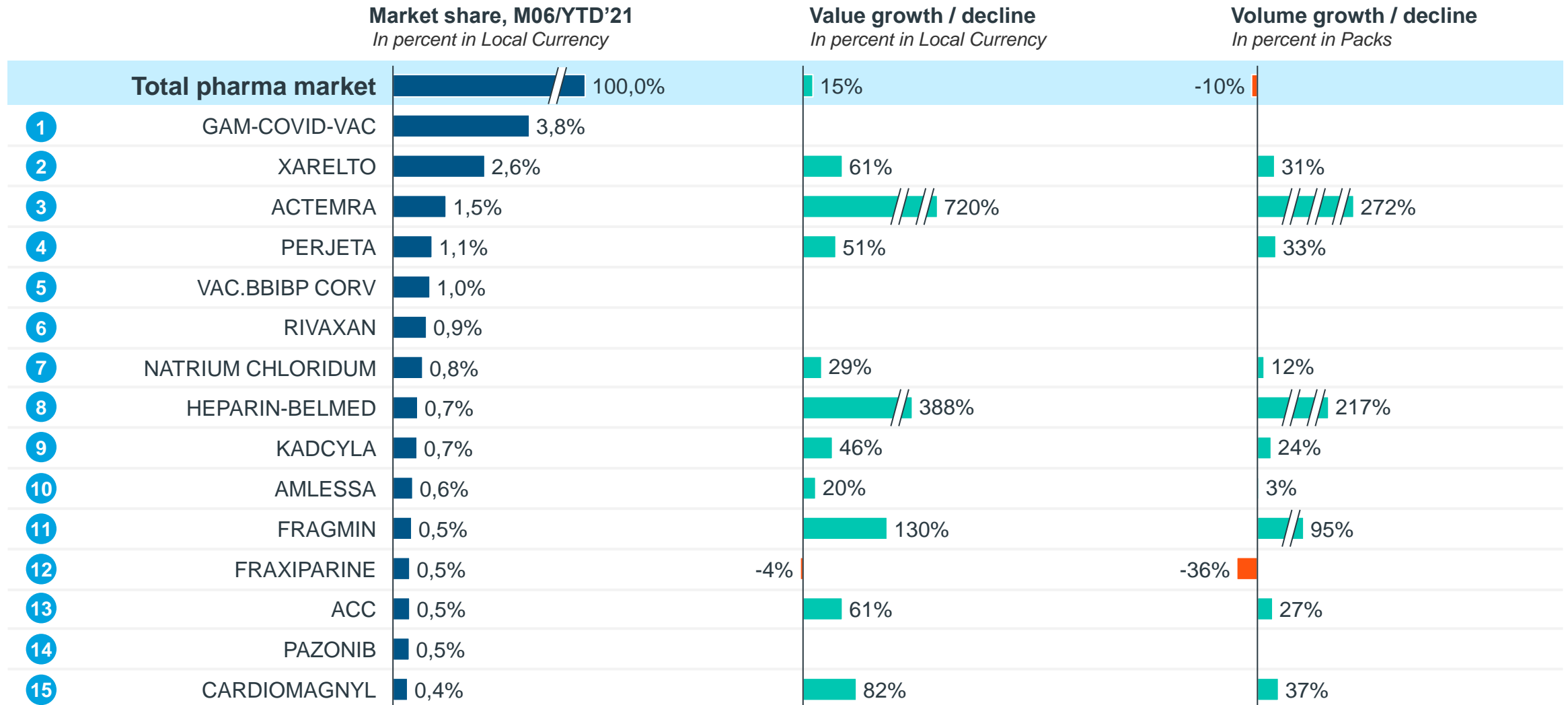


# TOP-15 corporations on Belarus market, January-June 2021

		Market share, M06/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%	15%	-10%
1	BELMEDPREP BEL	7,2%	7%	-17%
2	BORISOV.ZMP BEL	5,9%	-2%	-14%
3	LEKFARM BELARUS	4,7%	-3%	-2%
4	BAYER HEALTHCARE	4,5%	24%	-7%
5	ROCHE	3,8%	75%	-21%
6	MEDGAMAL	3,8%	14 507 641%	6 390 150%
7	PHARMLAND BEL	3,1%	0%	-4%
8	SANDOZ GROUP	2,8%	3%	-15%
9	SANOFI-AVENTIS	2,3%	-8%	-23%
10	PHARMTECNOLOG.BEL	2,3%	18%	-9%
11	KRKA	2,3%	8%	-9%
12	ACADEMPHARM BY	2,3%	90%	13%
13	GLAXOSMITHKLINE	2,1%	9%	-9%
14	TAKEDA	2,1%	25%	10%
15	SERVIER	2,1%	9%	-7%



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





10,9%



INFLATION

# Uzbekistan pharma market growth in January-June 2021

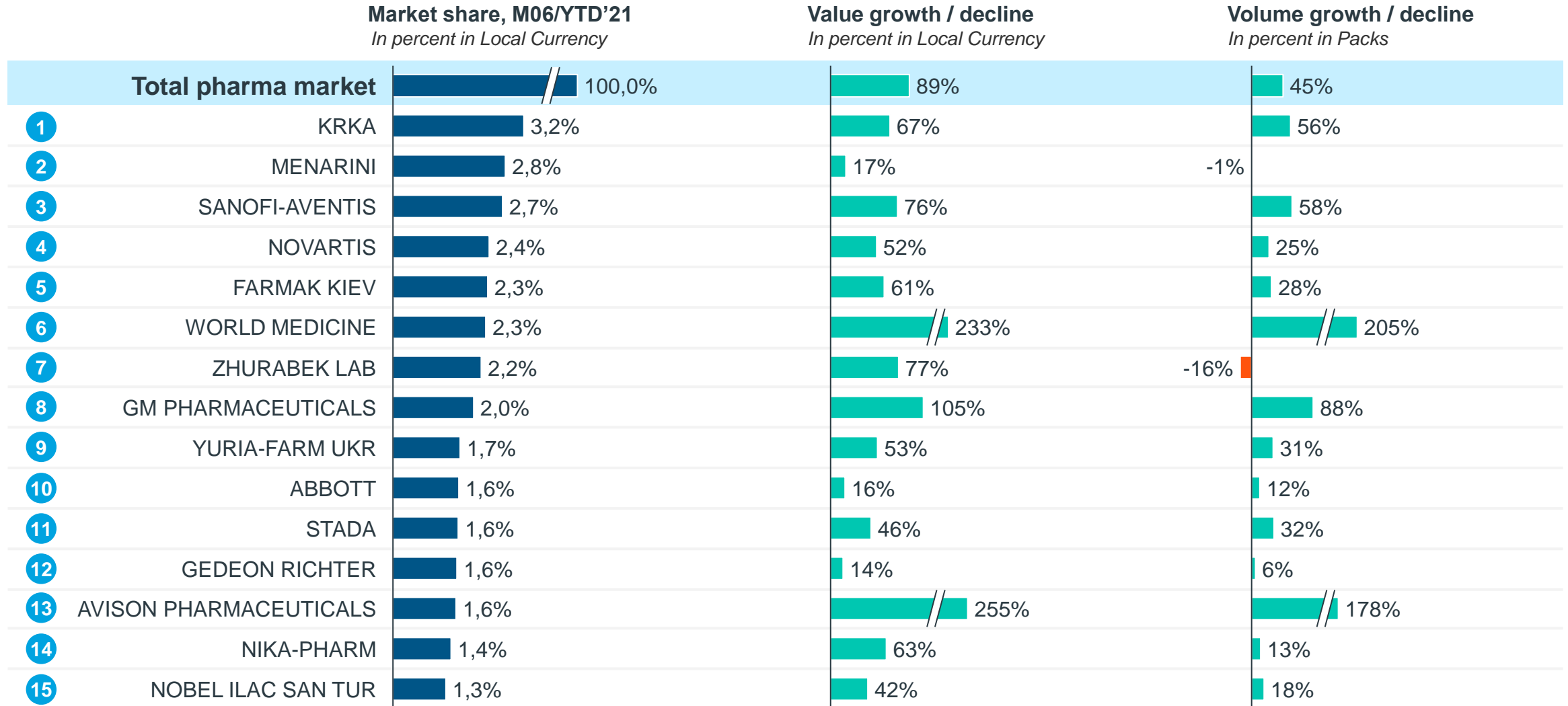
Market grew by 89% in value and by 45% in volume



Indicator	UZS	USD	EUR	PACKS
Value M06/YTD'21, Bln.	8 349	0,79	0,66	0,45
Growth M06/YTD'21, %	▲ 89%	▲ 75%	▲ 60%	▲ 45%



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



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-June 2021

		Market share, M06/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%	89%	45%
1	CEFTRIAZONE	1,0%	54%	-17%
2	REMEDESSA	1,0%		
3	TRIMOL	1,0%	1 914%	1 771%
4	QUPEN	0,7%	175%	164%
5	THERAFLU	0,6%	379%	369%
6	ACC	0,6%	144%	134%
7	TIVORTIN	0,6%	106%	108%
8	NIMESIL	0,6%	22%	21%
9	CANEPHRON N	0,6%	61%	63%
10	ZF-UZ-VAC2001	0,6%		
11	VIFERON	0,5%	12%	4%
12	AZIMAC	0,5%	194%	178%
13	RINOXIL	0,5%	80%	75%
14	CLEXANE	0,5%	286%	278%
15	SERMIN	0,4%	151%	129%



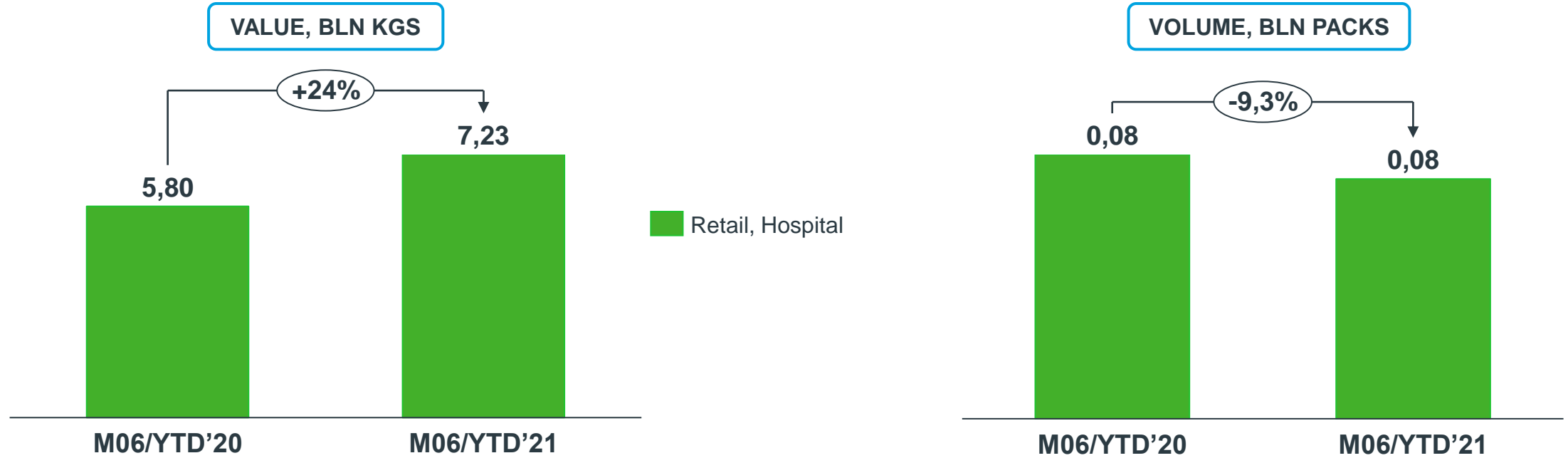
14,2%



INFLATION

# Kyrgyzstan pharma market growth in January-June 2021

Market grew by 24% in value and decreased by 9,3% in volume

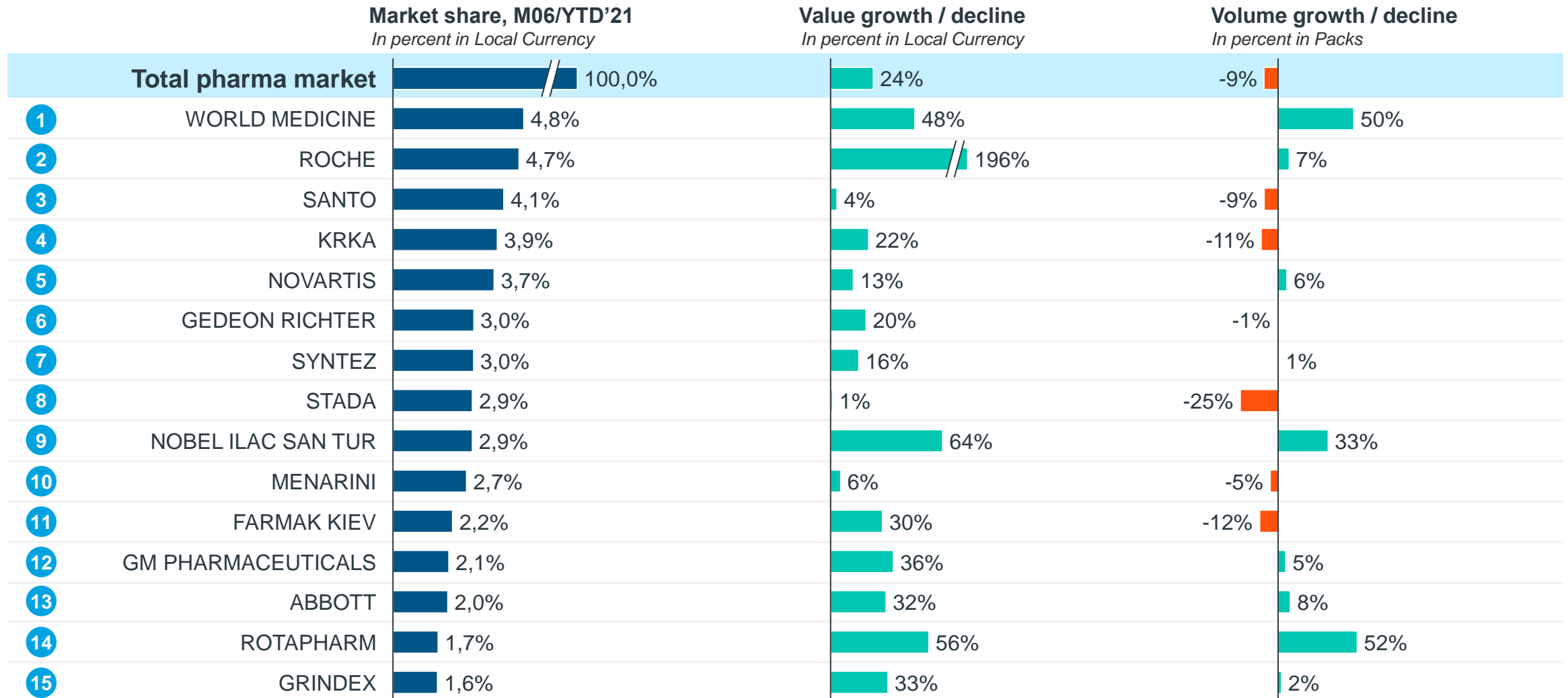


Indicator	KGS	USD	EUR	PACKS
Value M06/YTD'21, Bln.	7,2	0,09	0,07	0,08
Growth M06/YTD'21, %	▲ 24%	▲ 8,3%	▼ -0,7%	▼ -9,3%

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



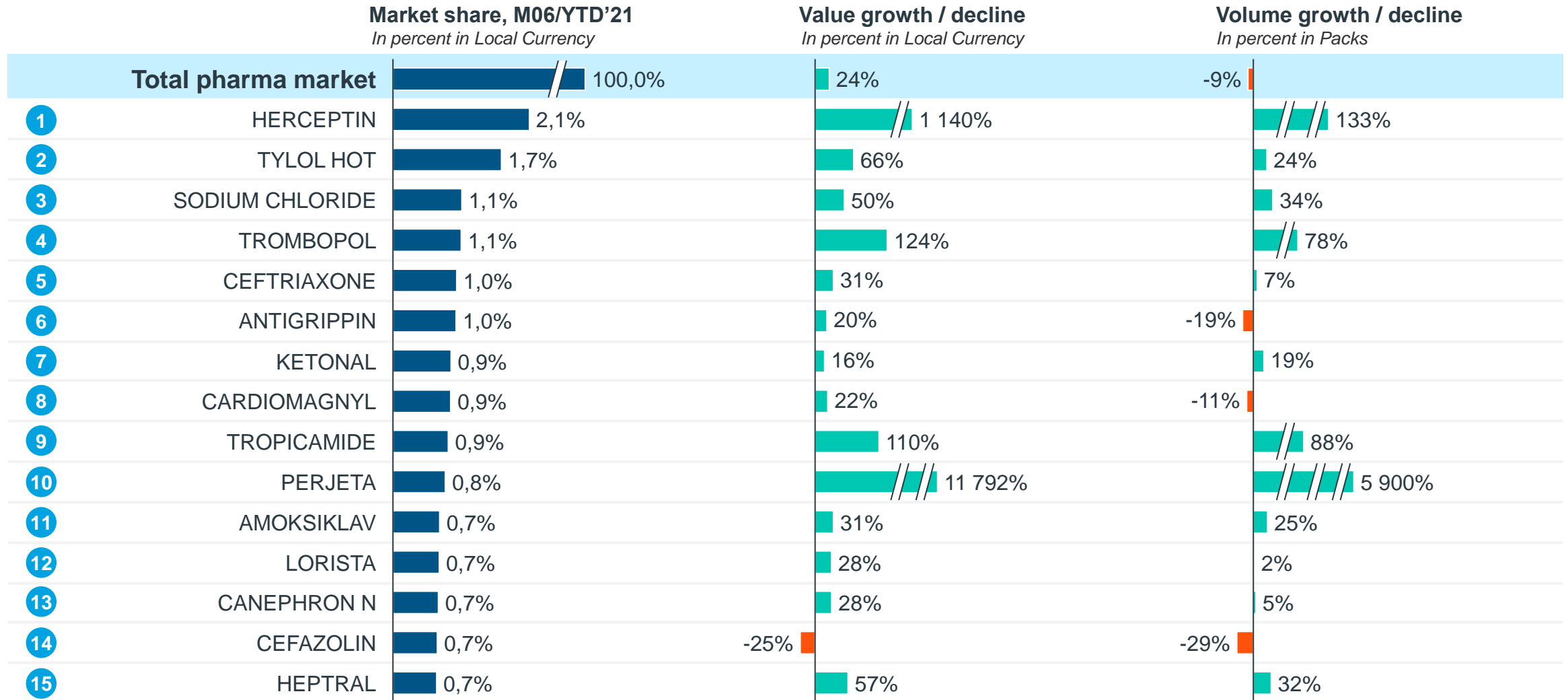
# TOP-15 corporations on Kyrgyzstan market, January-June 2021







# TOP-15 brands on Kyrgyzstan market, January-June 2021





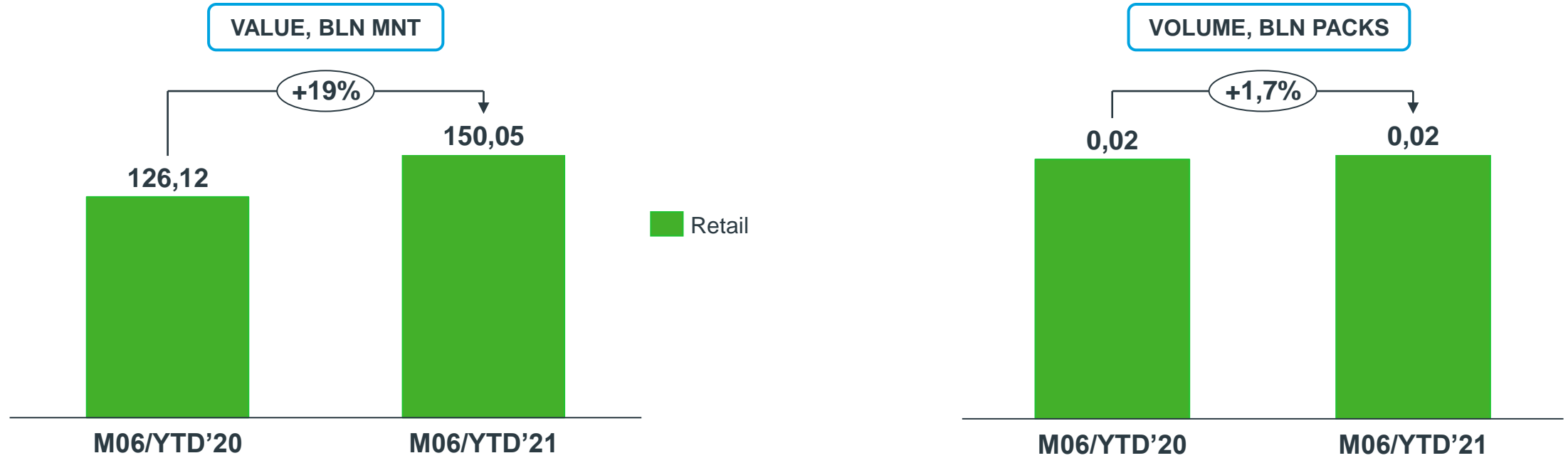
6,6%



INFLATION

# Mongolia pharma market growth in January-June 2021

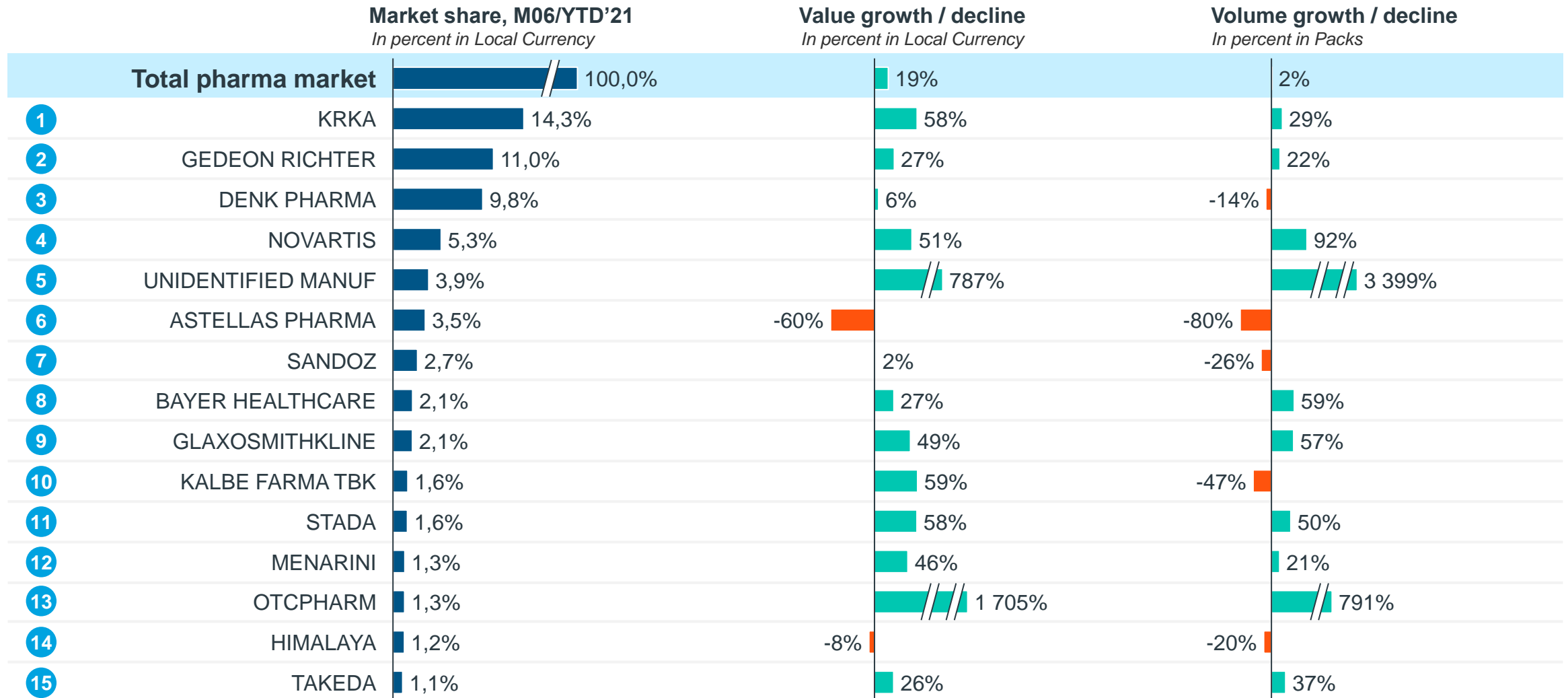
Market grew by 19% in value and by 1,7% in volume



Indicator	MNT	USD	EUR	PACKS
Value M06/YTD'21, Bln.	150	0,05	0,04	0,02
Growth M06/YTD'21, %	▲ 19%	▲ 16%	▲ 5,7%	▲ 1,7%



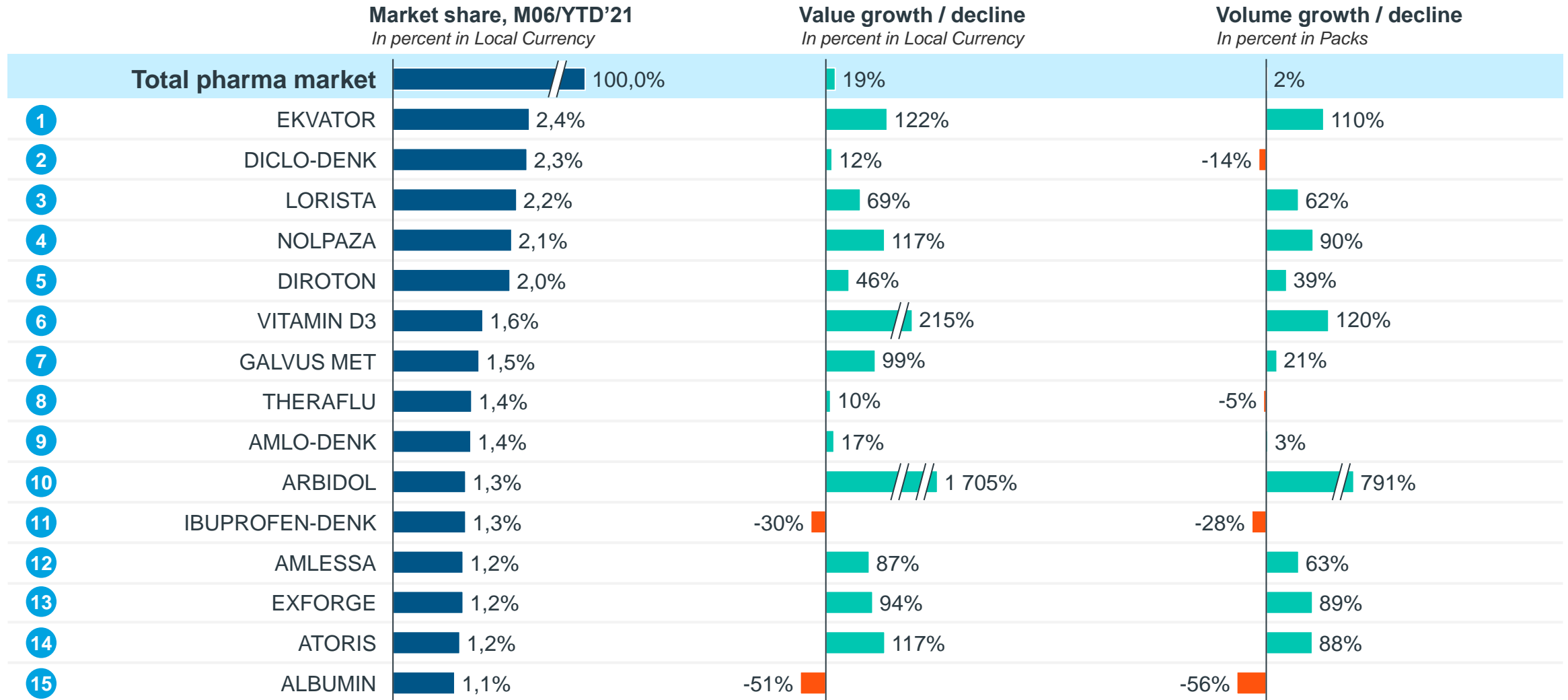
# TOP-15 corporations on Mongolia market, January-June 2021



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



# TOP-15 brands on Mongolia market, January-June 2021



# CONTACT US

## **Anton Kalyapin**

*Director, Offering and Supplier Relations*

 Anton.Kalyapin@IQVIA.com

 +7 499 272 05 00

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## **Svetlana Nikulina**

*Sales Director Russia and CIS*

 Svetlana.Nikulina@IQVIA.com

 +7 499 272 05 00

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## **Bakhtiiar Tinibaev**

*Supplier Services Analyst*

 Bakhtiiar.Tinibaev@IQVIA.com

 +7 499 272 05 00