



Facts from IQVIA

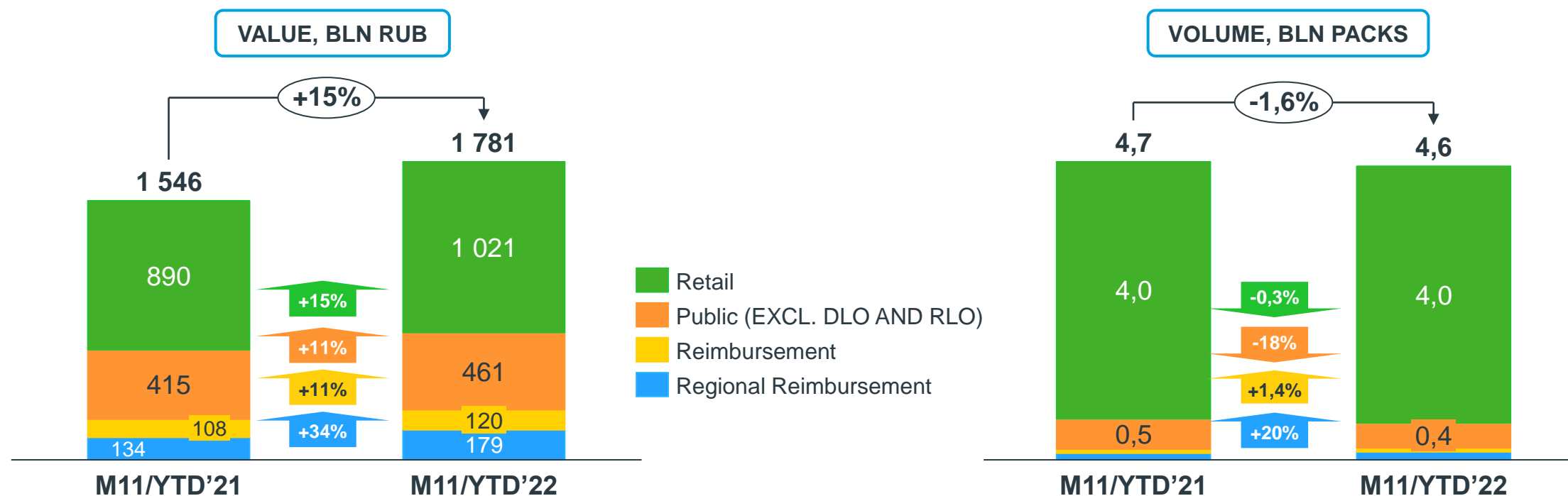
M11 2022

Russian pharma market dynamics in November 2022

Market grew by 15% in value and dropped by 1,6% in volume



12%
INFLATION



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

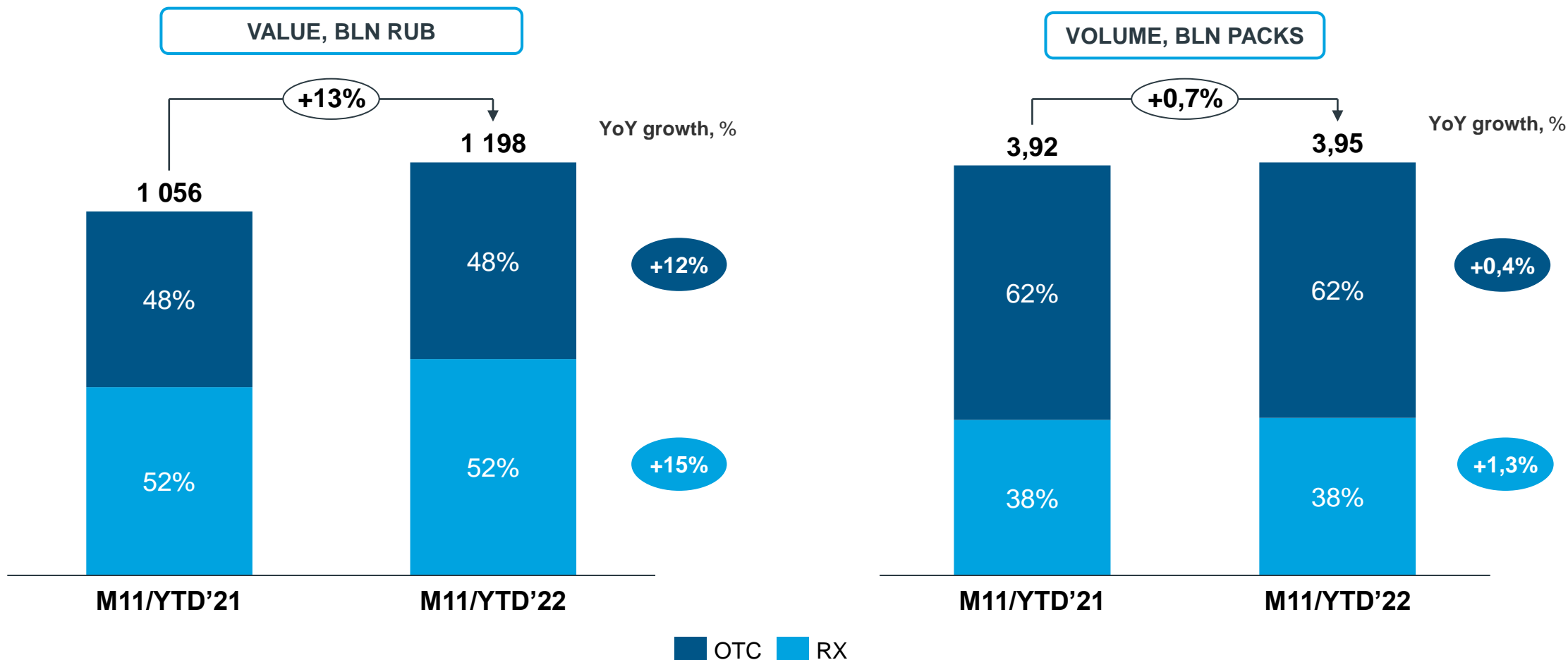
Indicator	RUB	USD	EUR	PACKS
Value M11/YTD'22, Bln.	1 781	26,4	25,3	4,6
Growth M11/YTD'22, %	▲ 15%	▲ 25%	▲ 43%	▼ -1,6%

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

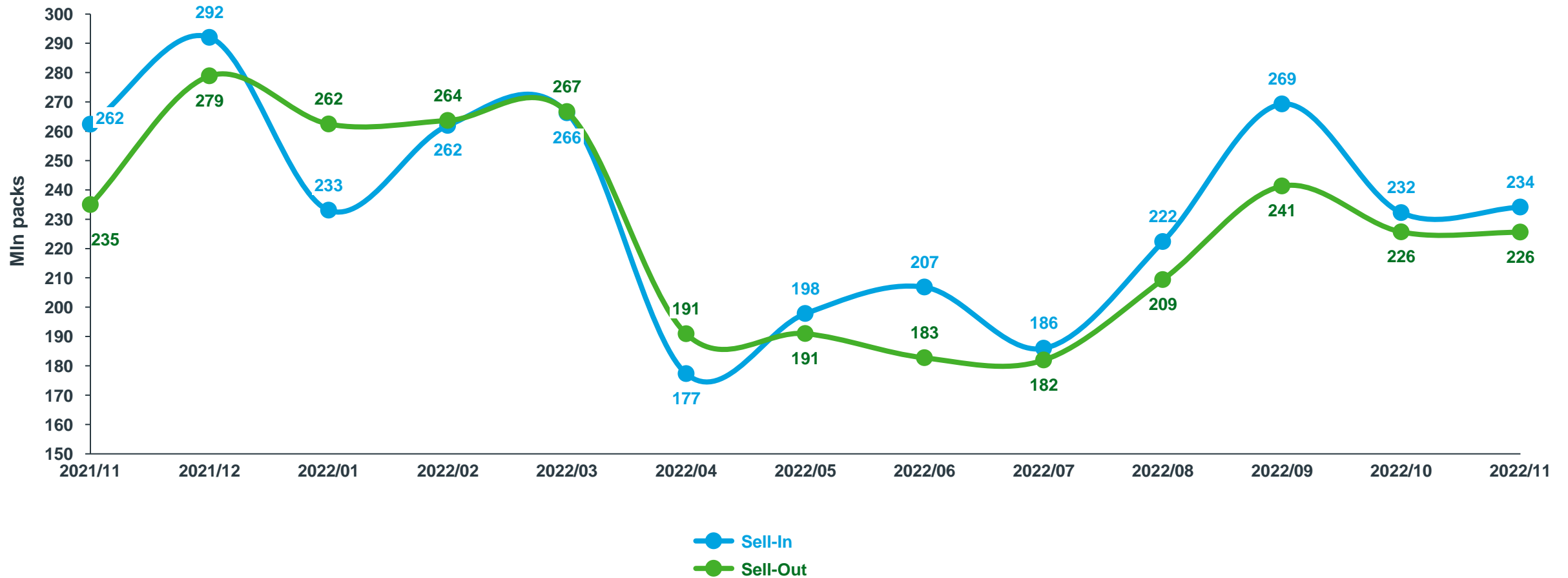
Russian pharma market dynamics in November 2022



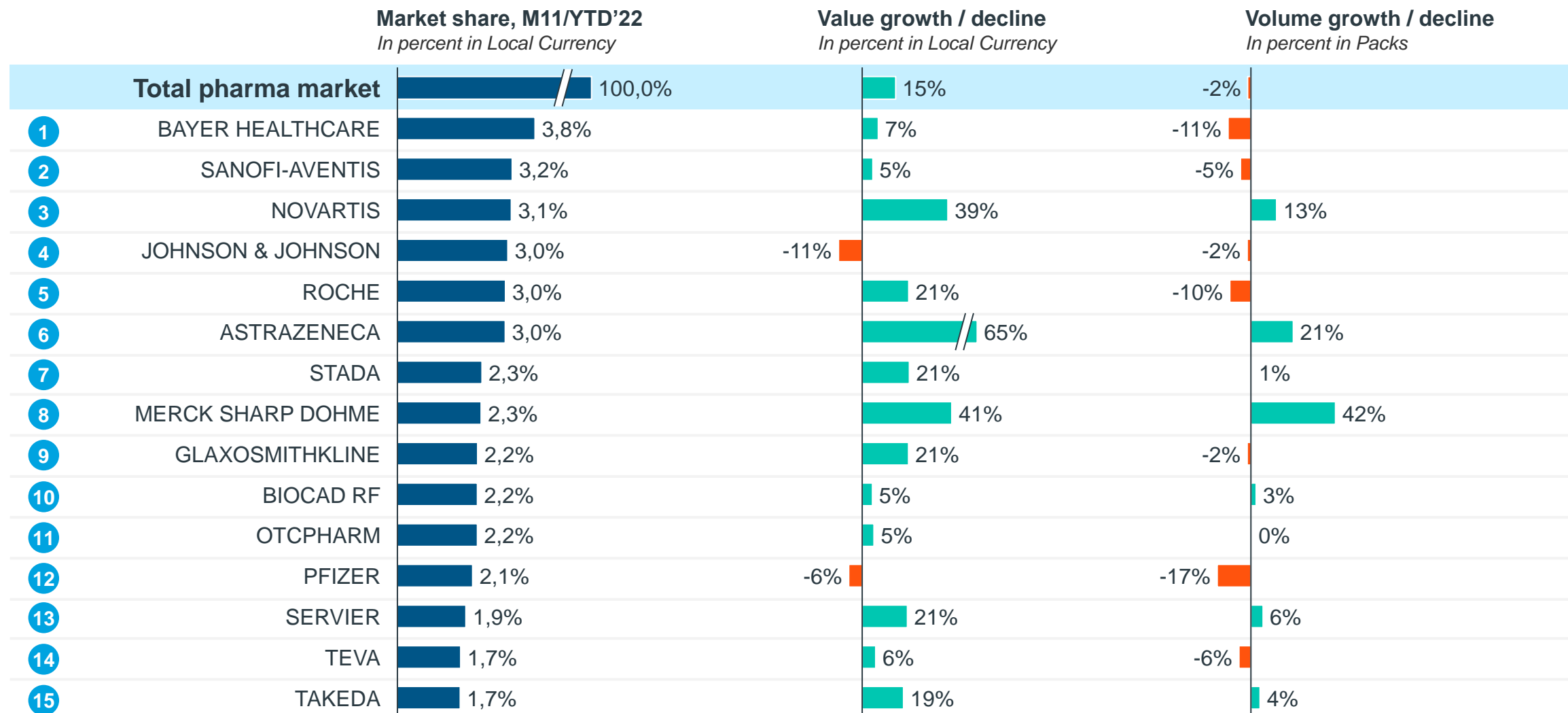
Retail Sell-Out: Market grew by 13% in value and 0,7% in volume



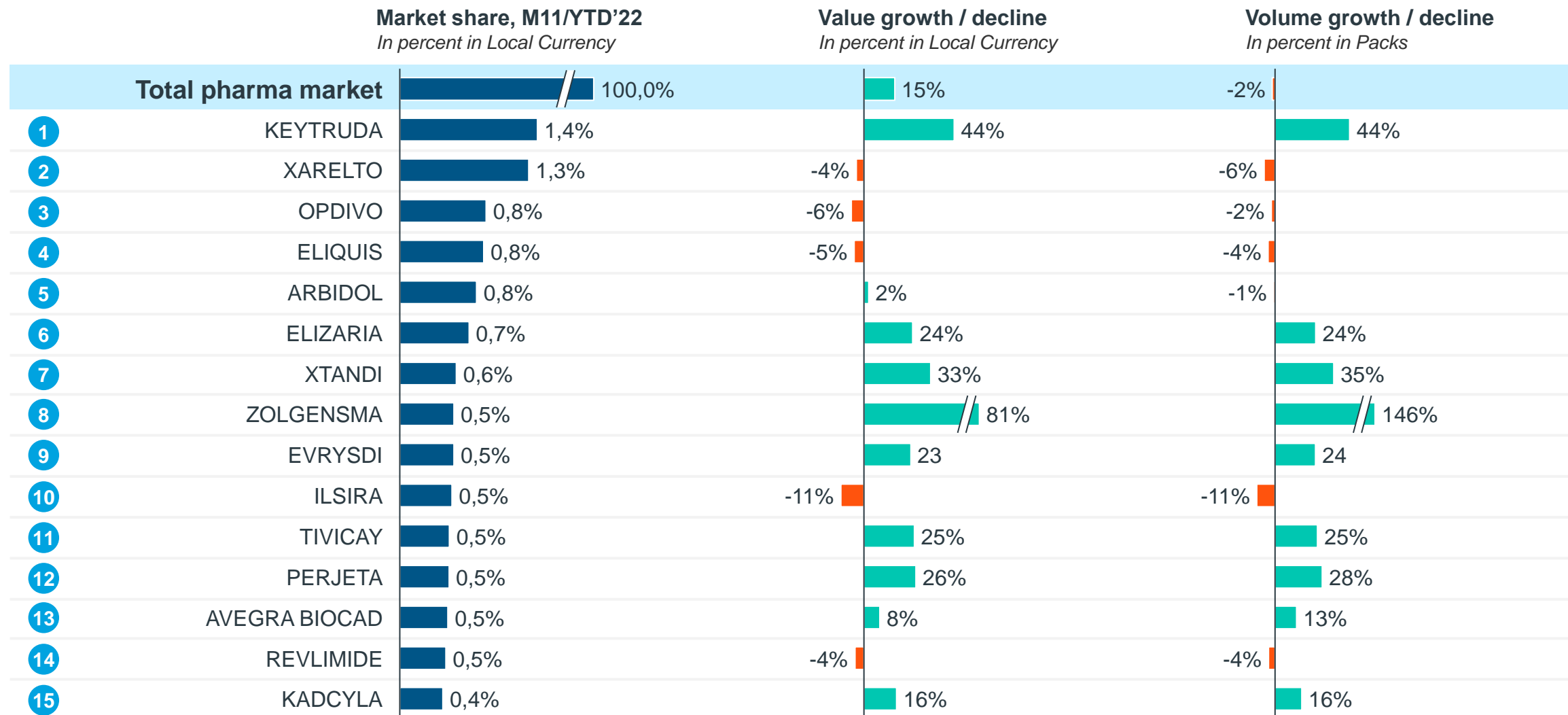
Sell-In vs Sell-Out, OTC registered drugs



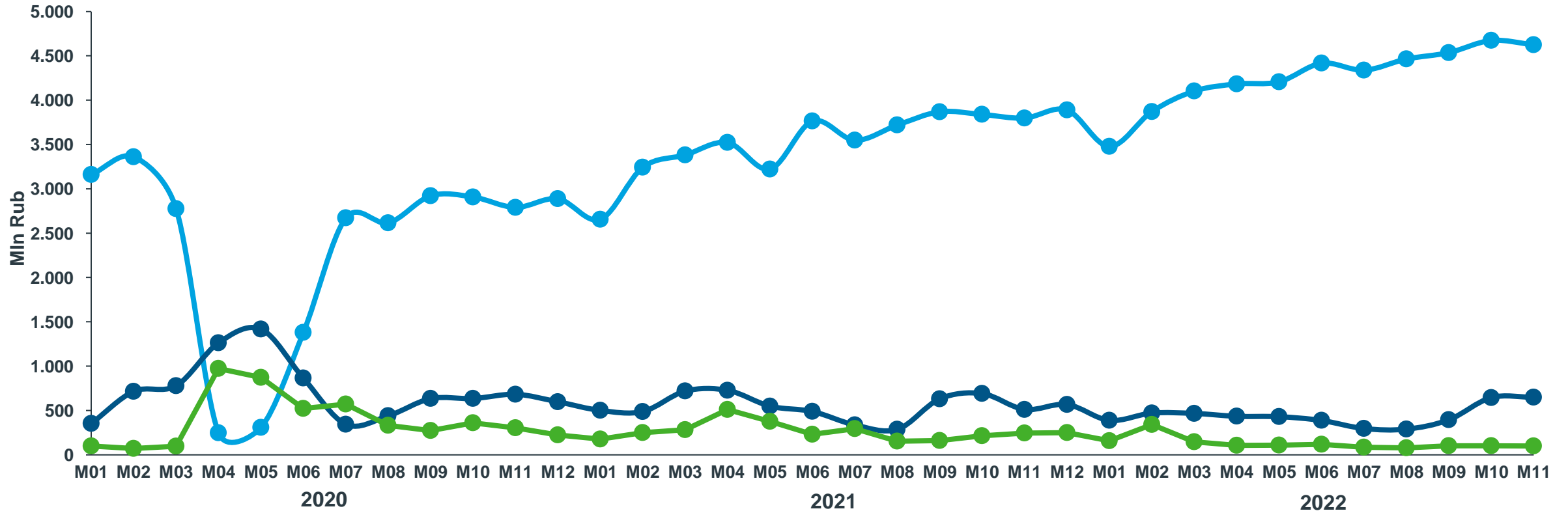
TOP-15 corporations on Russian market, November 2022



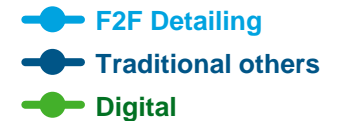
TOP-15 brands on Russian market, November 2022



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

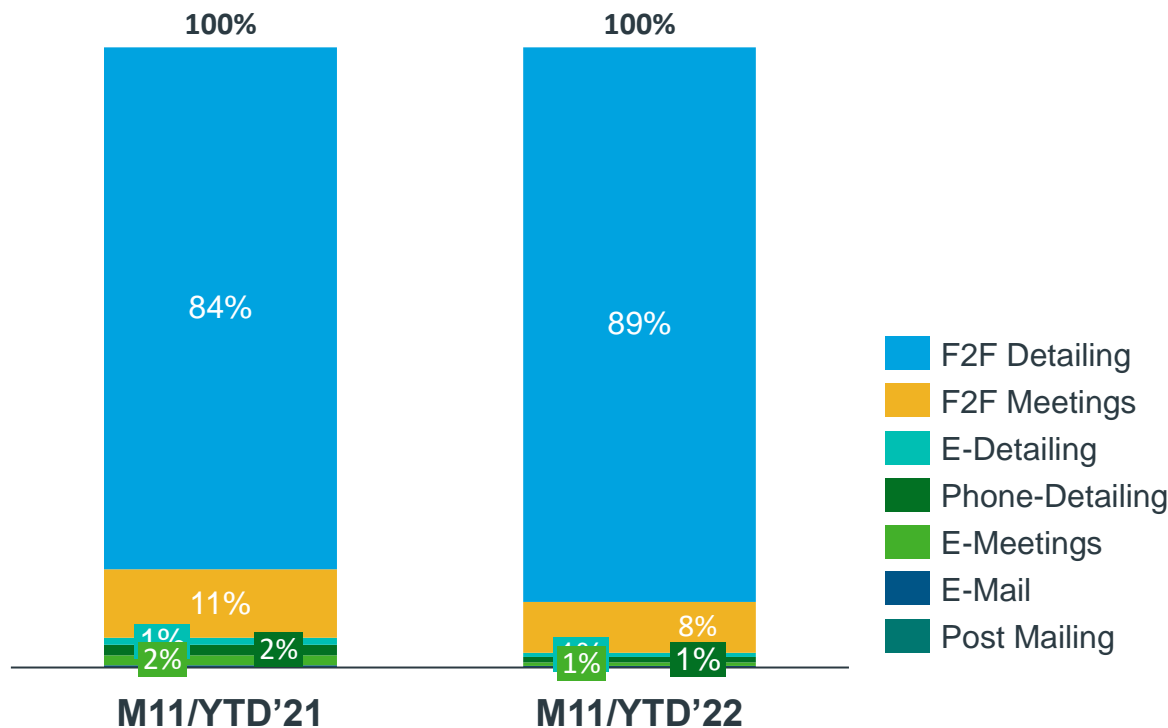


Value – a cost of each interaction projected on doctor’s universe

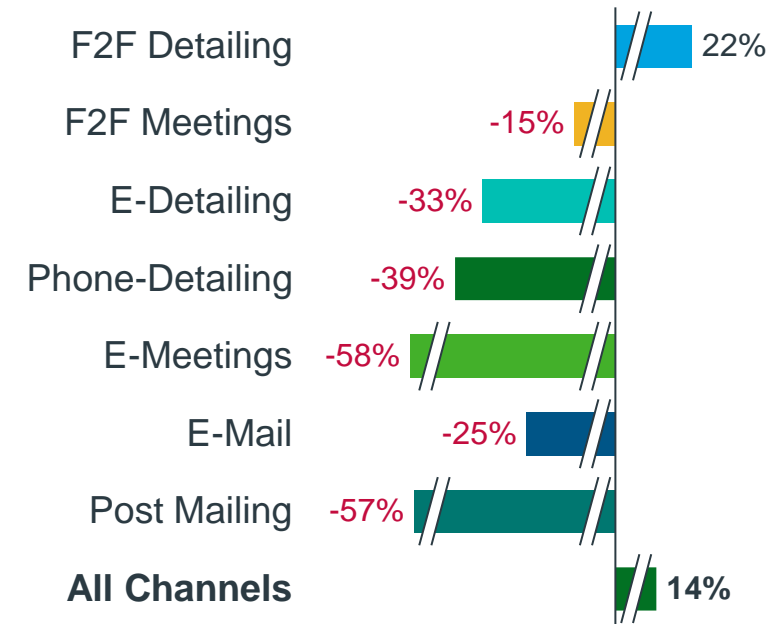
Total Market overall promotional value in Rub increased by 14%, YTD November 2022 vs 2021



Promotional value in Rub share by channel



% Changes in promotional value in Rub by channel YTD November 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

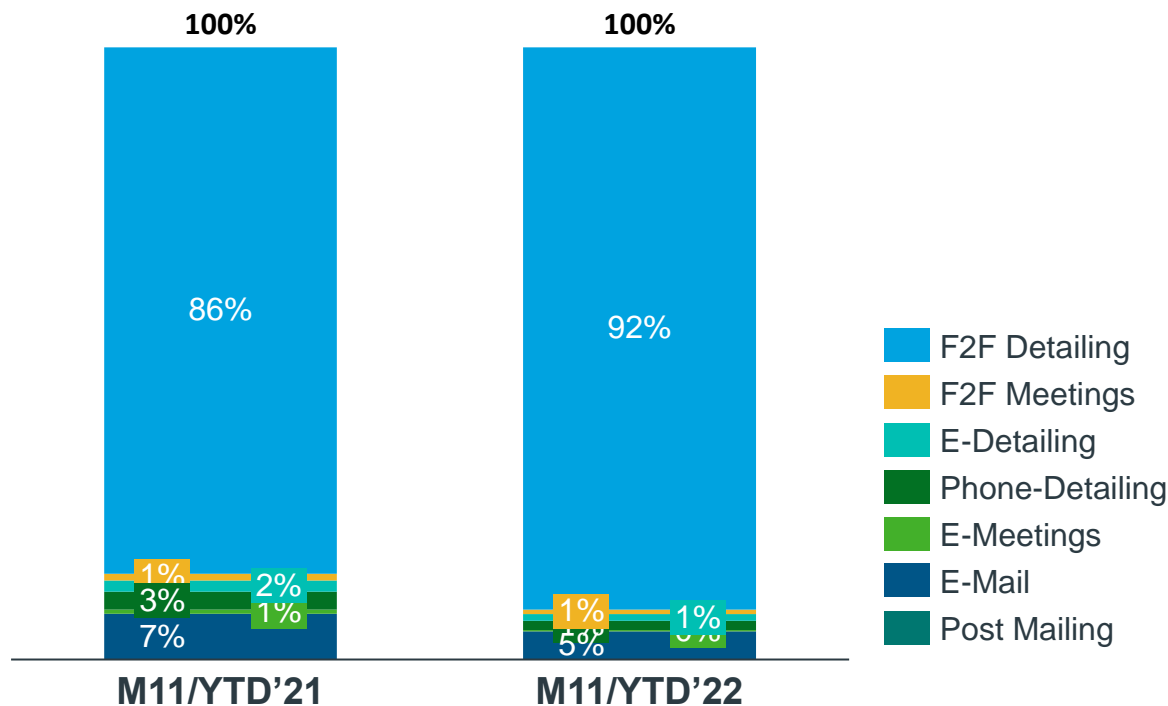
Value – a cost of each interaction projected on doctor's universe

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.

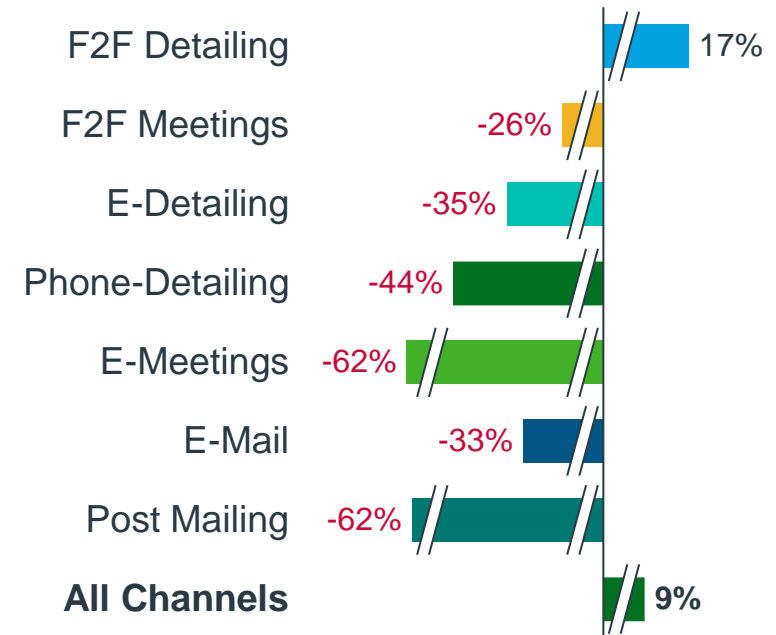
Total Market overall promotional volume (contacts) increased by 9%, YTD November 2022 vs 2021



Promotional volume in contacts share by channel



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



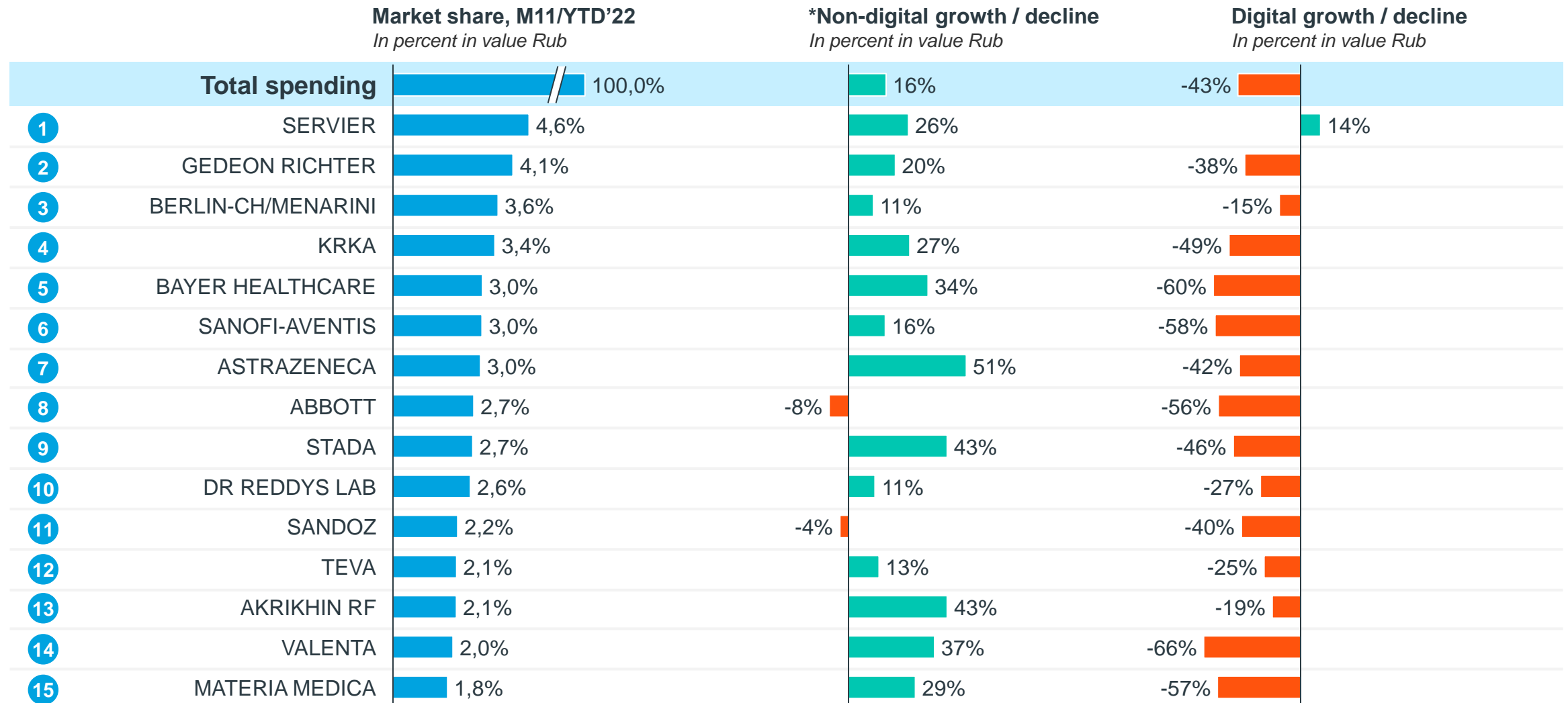
F2F Detailing – Reps visits. **Traditional others:** 1) F2F meetings – group meetings, round tables etc, 2) Phone Detailing – phone calls, 3) E-mail – communication via email. 4) Post Mailing – paper mails. **Digital:** 1) E-detailing – 1-1 calls visits using digitabl platforms 2) E-meetings – group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



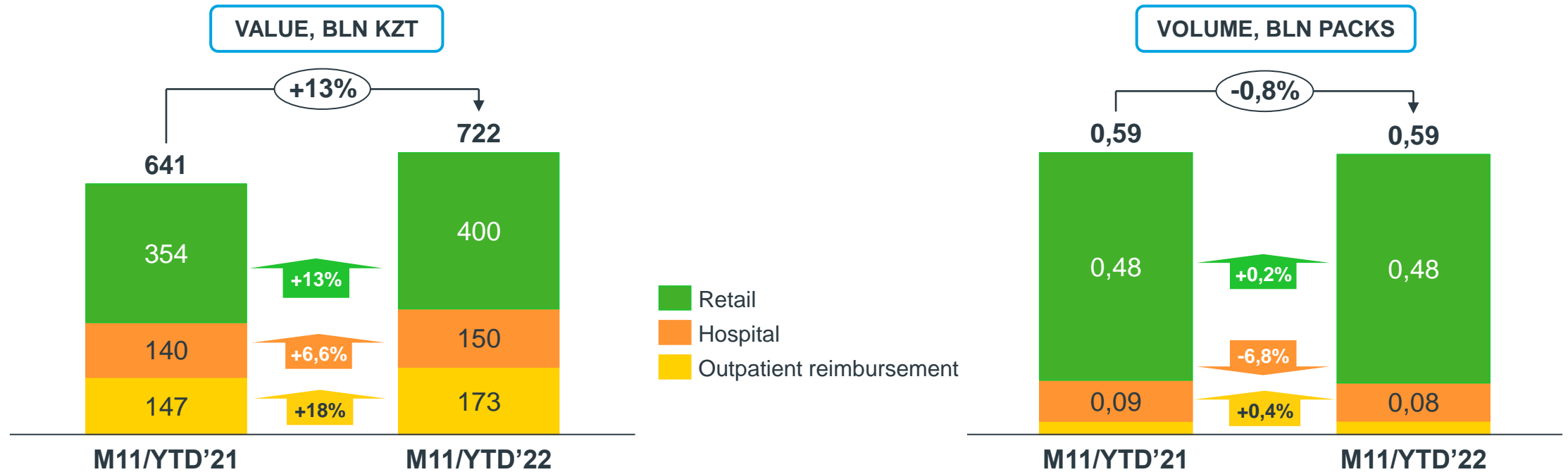
Kazakhstan pharma market dynamics in November 2022

Market grew by 13% in value and dropped by 0,8% in volume

20%



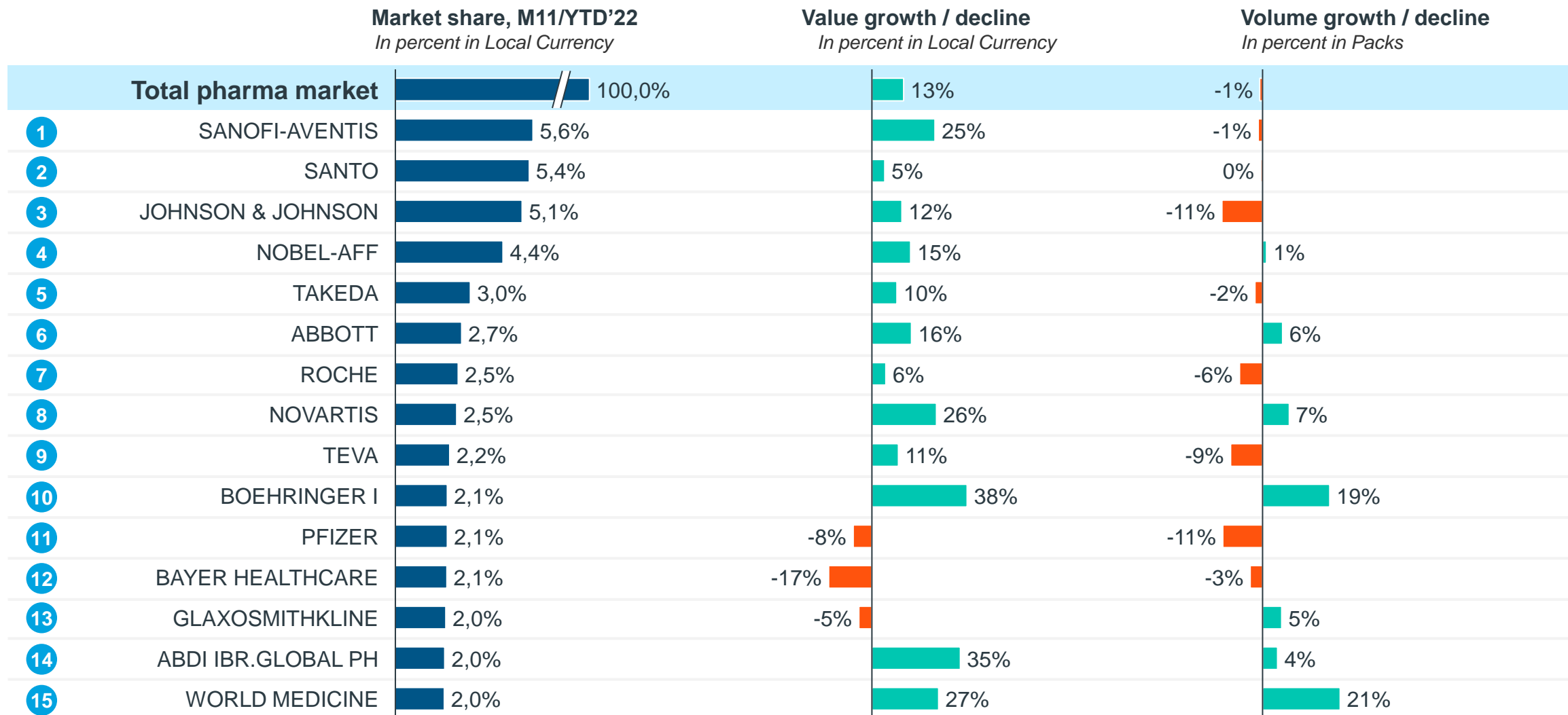
INFLATION



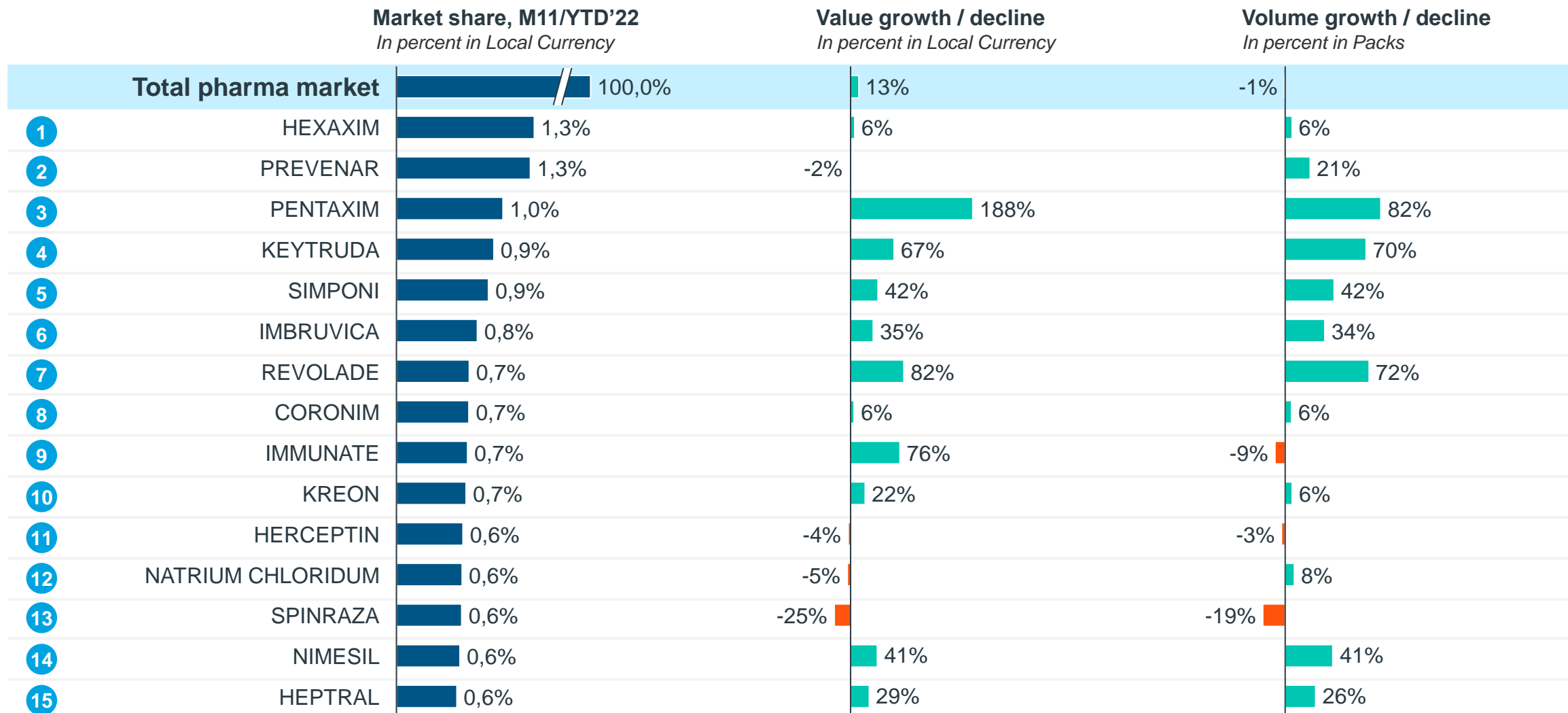
Indicator	KZT	USD	EUR	PACKS
Value M11/YTD'22, Bln.	722	1,57	1,49	0,59
Growth M11/YTD'22, %	▲ 13%	▲ 3,8%	▲ 17%	▼ -0,8%

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, November 2022

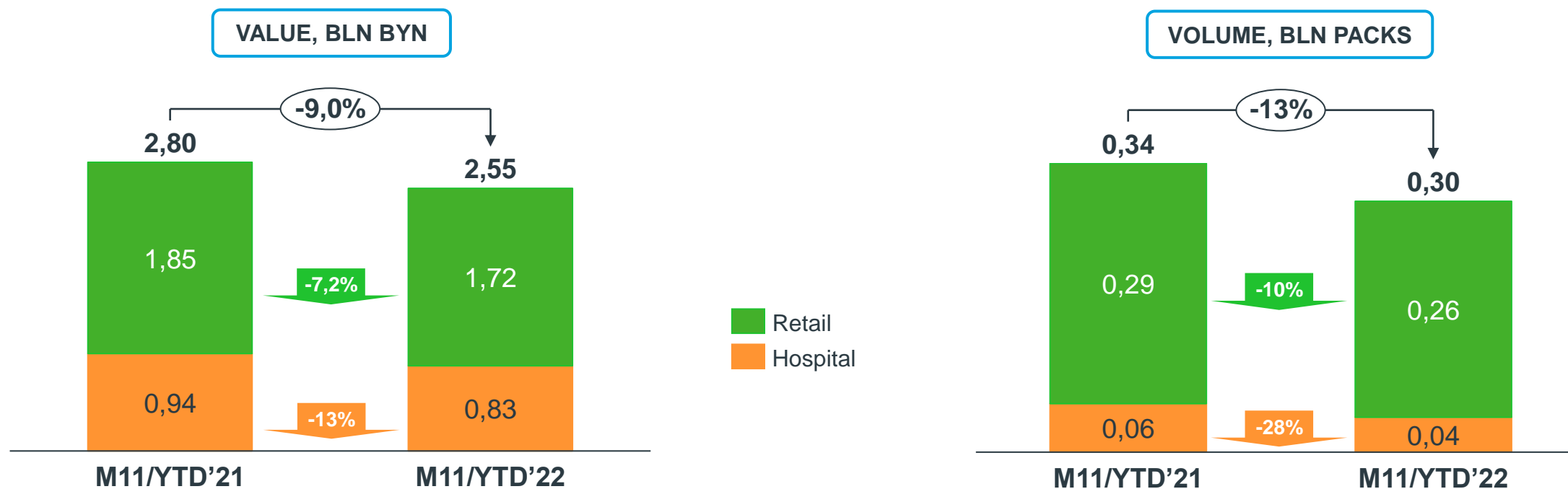


TOP-15 brands on Kazakhstan market, November 2022



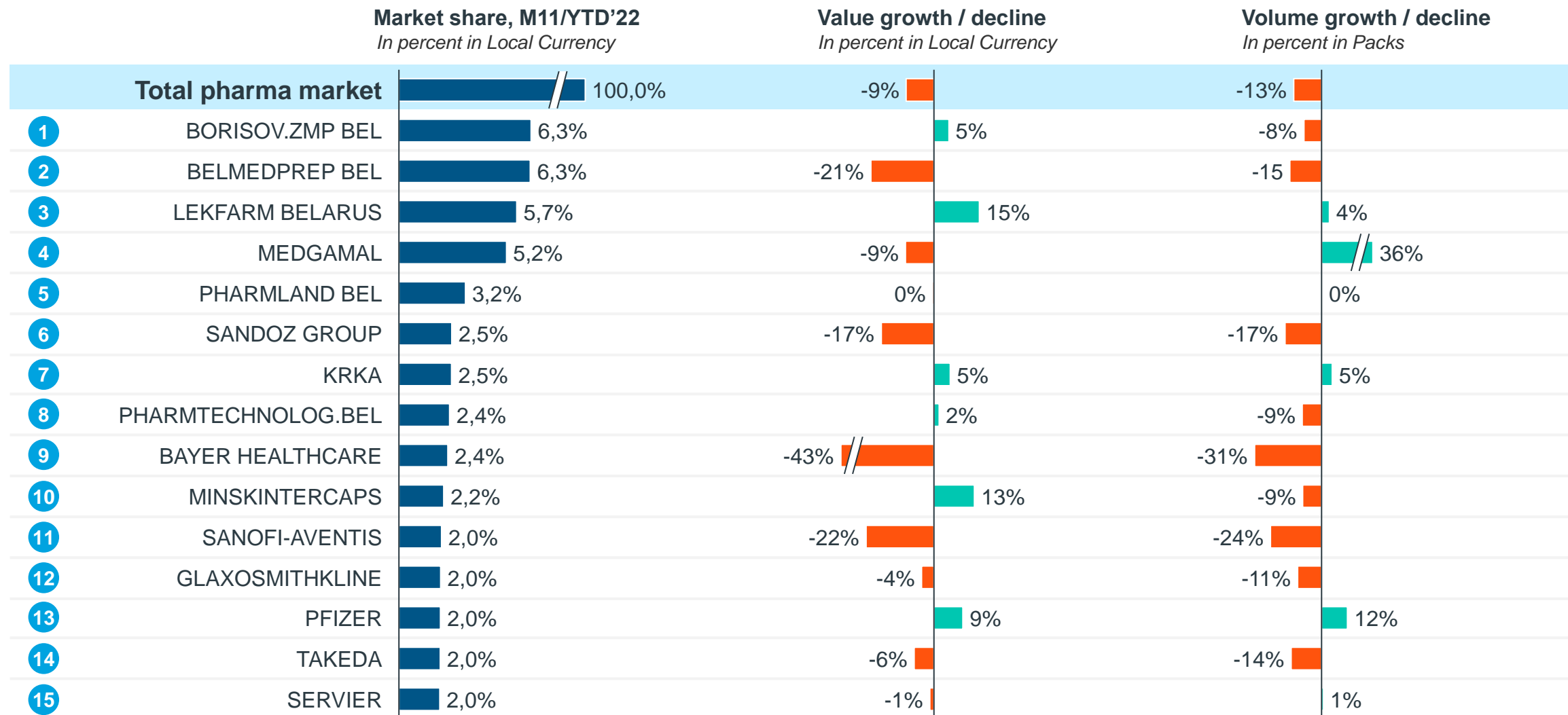
Belarus pharma market dynamics in November 2022

Market dropped by 9% in value and by 13% in volume

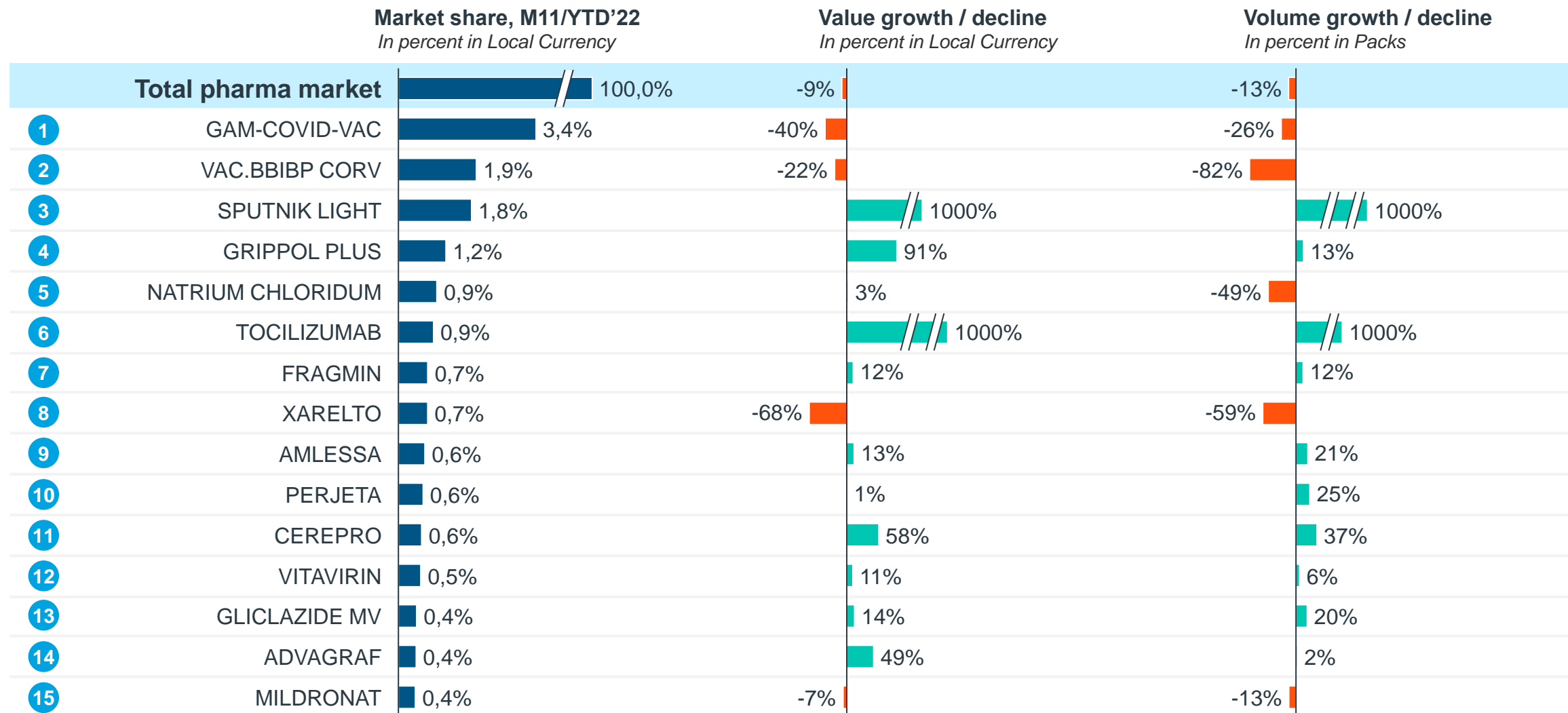


Indicator	BYN	USD	EUR	PACKS
Value M11/YTD'22, Bln.	2,55	0,97	0,93	0,30
Growth M11/YTD'22, %	▼ -9,0%	▼ -12%	▼ -0,4%	▼ -13%

TOP-15 corporations on Belarus market, November 2022

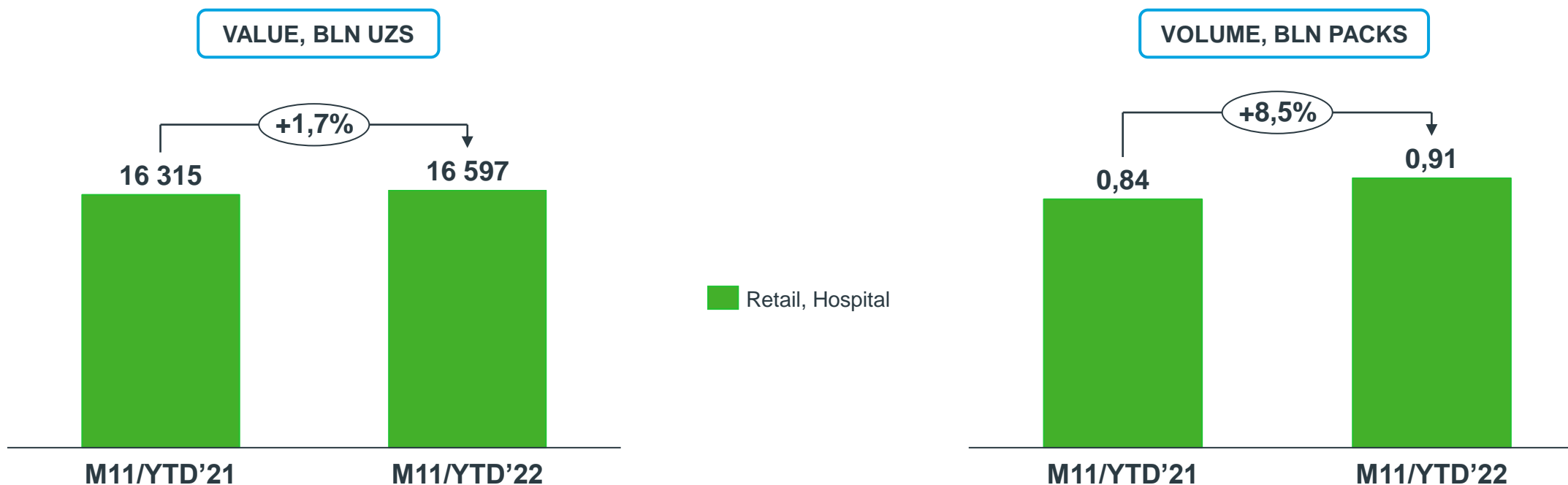


TOP-15 brands on Belarus market, November 2022



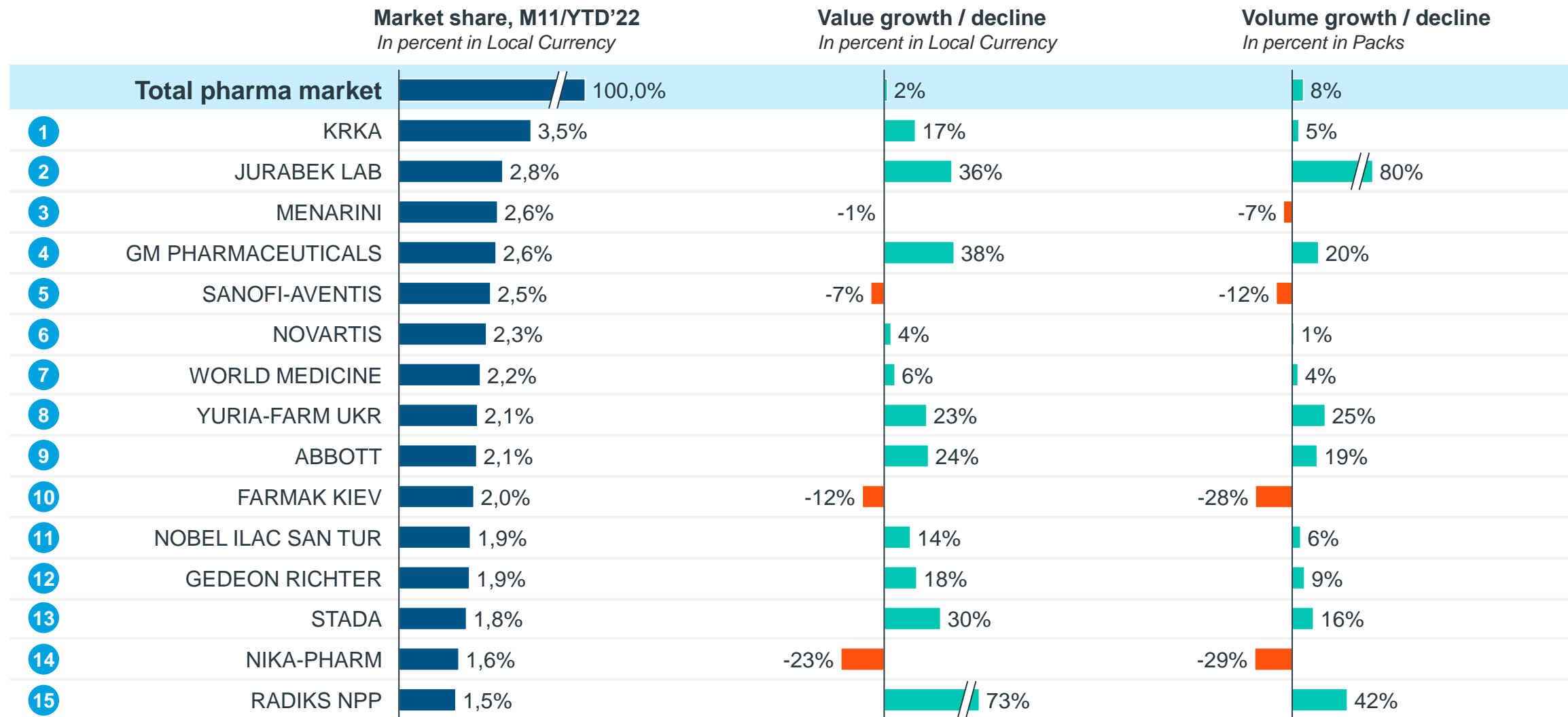
Uzbekistan pharma market dynamics in November 2022

Market grew by 1,7% in value and 8,5% in volume



Indicator	UZS	USD	EUR	PACKS
Value M11/YTD'22, Bln.	16 597	1,50	1,44	0,91
Growth M11/YTD'22, %	▲ 1,7%	▼ -2,4%	▲ 11%	▲ 8,5%

TOP-15 corporations on Uzbekistan market, November 2022



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, November 2022



		Market share, M11/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%	2%	8%
1	QUPEN	1,0%	28%	24%
2	NATRIUM CHLORIDUM	0,9%	154%	69%
3	VACC.PNEUMOC.C.10V	0,8%	561%	77%
4	THERAFLU	0,8%	24%	24%
5	TIVORTIN	0,8%	20%	26%
6	TYLOLFEN HOT	0,8%	46%	40%
7	CEFTRIAZONE	0,7%	-43%	16%
8	NIMESIL	0,7%	-3%	-3%
9	L-LYSINE AESCINATE	0,6%	-1%	-7%
10	VIFERON	0,6%	8%	0%
11	ACTOVEGIN	0,6%	8%	4%
12	SERMIN	0,6%	27%	19%
13	REOSORBILACT	0,6%	29%	30%
14	AMLESSA	0,6%	33%	21%
15	ORSA	0,5%	144%	124%

Armenia pharma market dynamics in November 2022

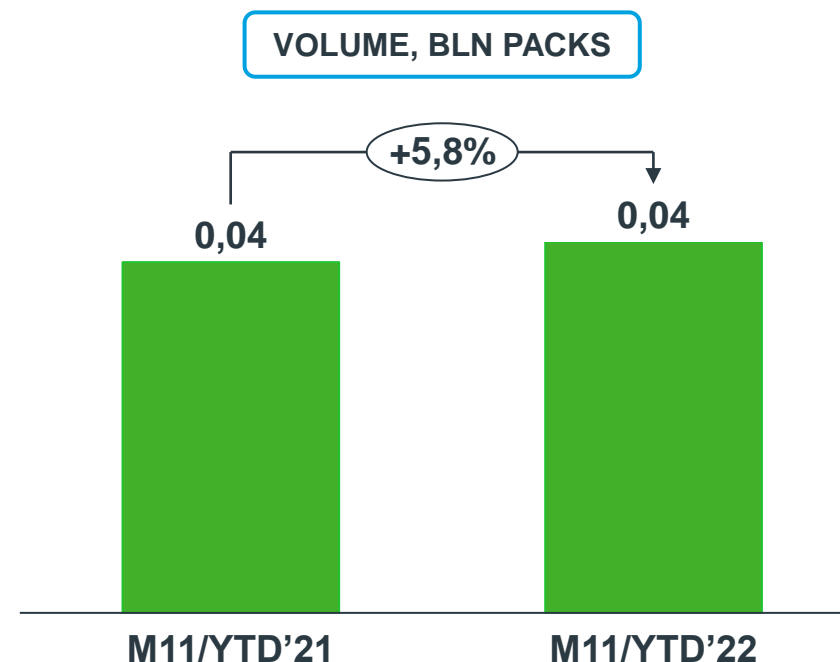
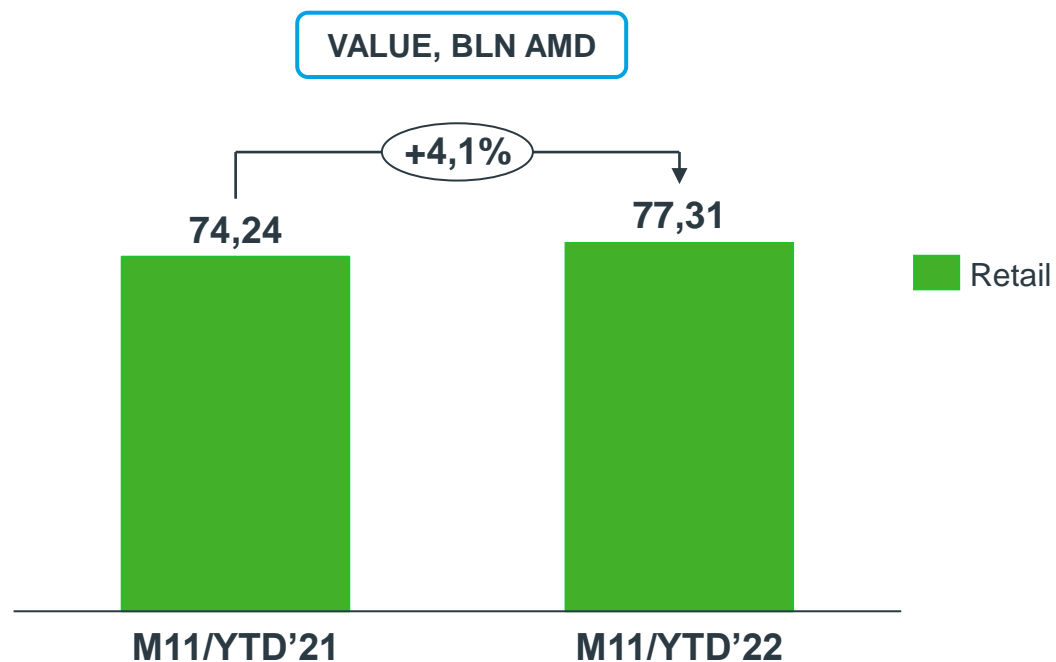
Market grew by 4,1% in value and by 5,8% in volume



8,8%

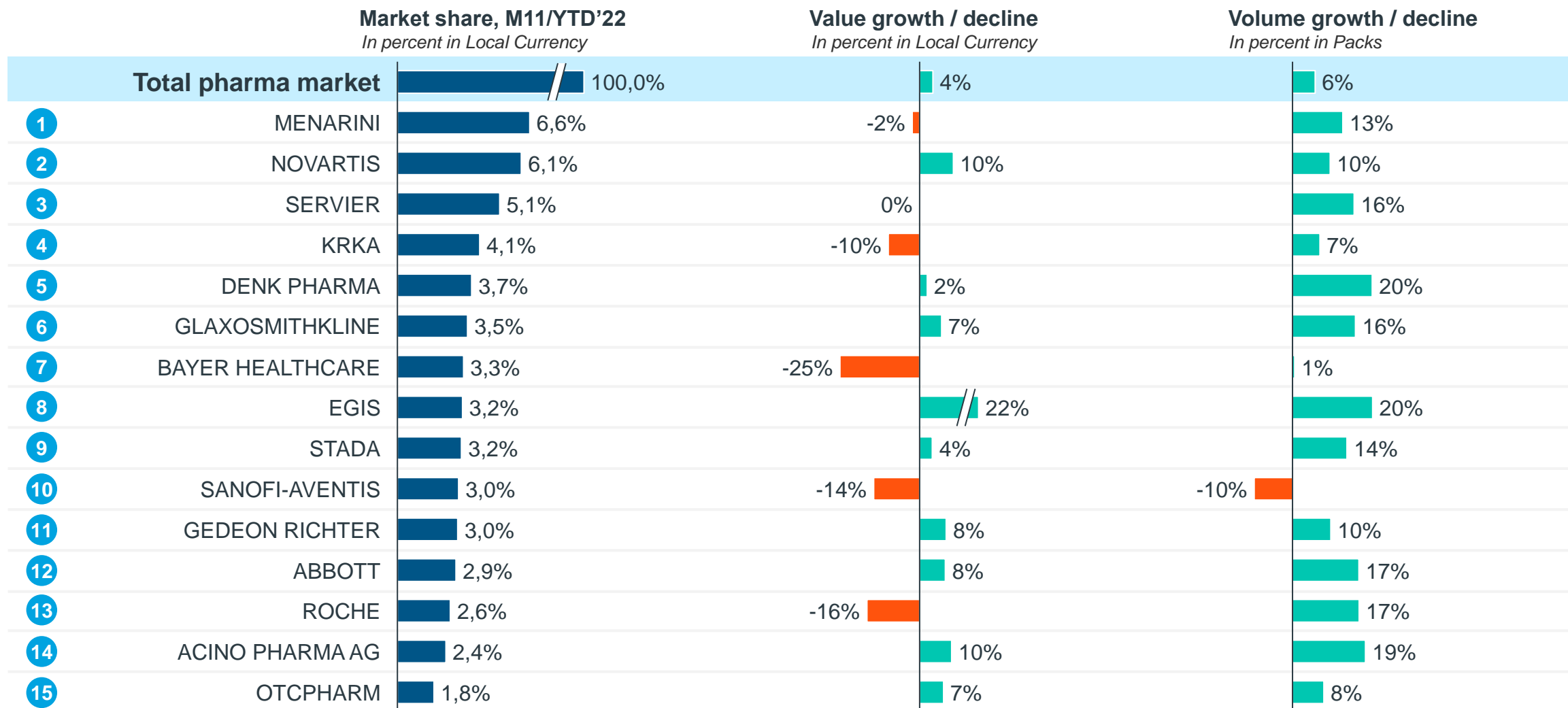


INFLATION

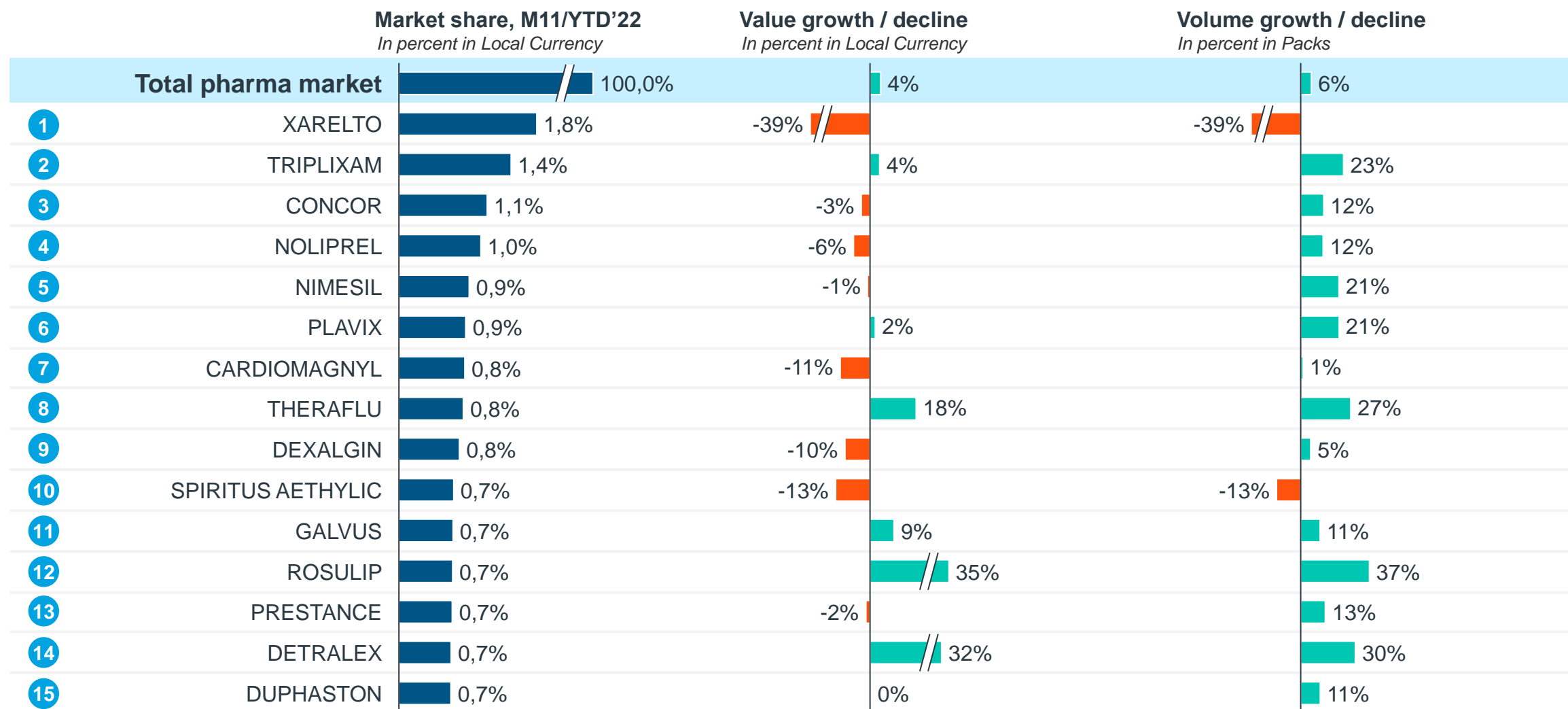


Indicator	AMD	USD	EUR	PACKS
Value M11/YTD'22, Bln.	77,3	0,18	0,17	0,04
Growth M11/YTD'22, %	▲ 4,1%	▲ 21%	▲ 36%	▲ 5,8%

TOP-15 corporations on Armenia market, November 2022



TOP-15 brands on Armenia market, November 2022



Georgia pharma market dynamics in November 2022

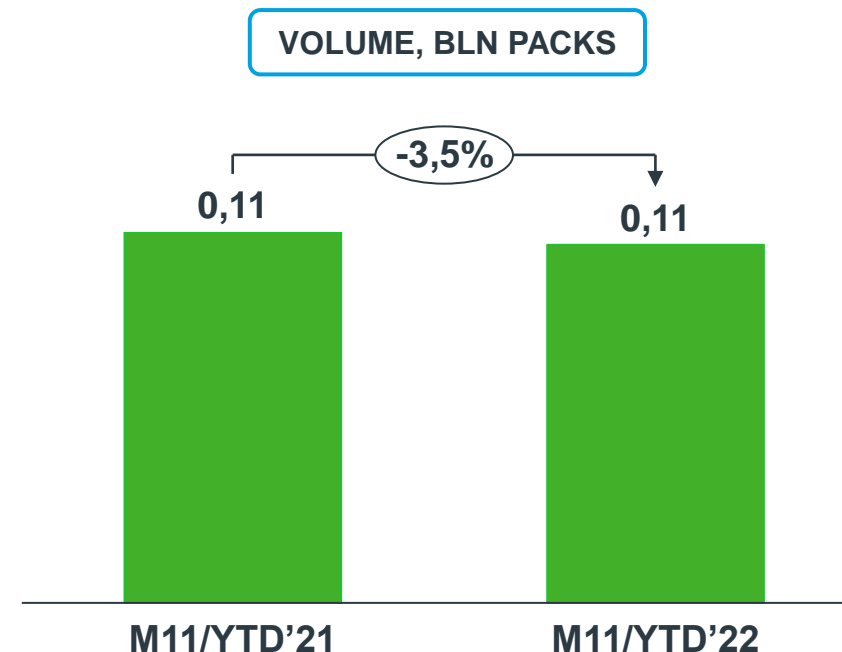
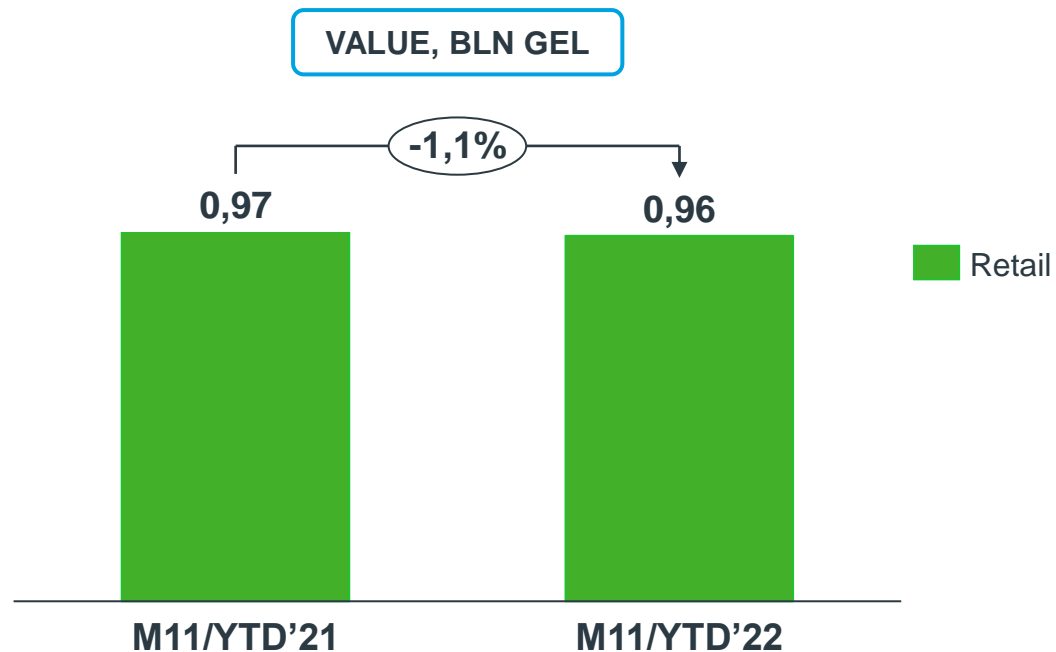
Market dropped by 1,1% in value and by 3,5% in volume



10%

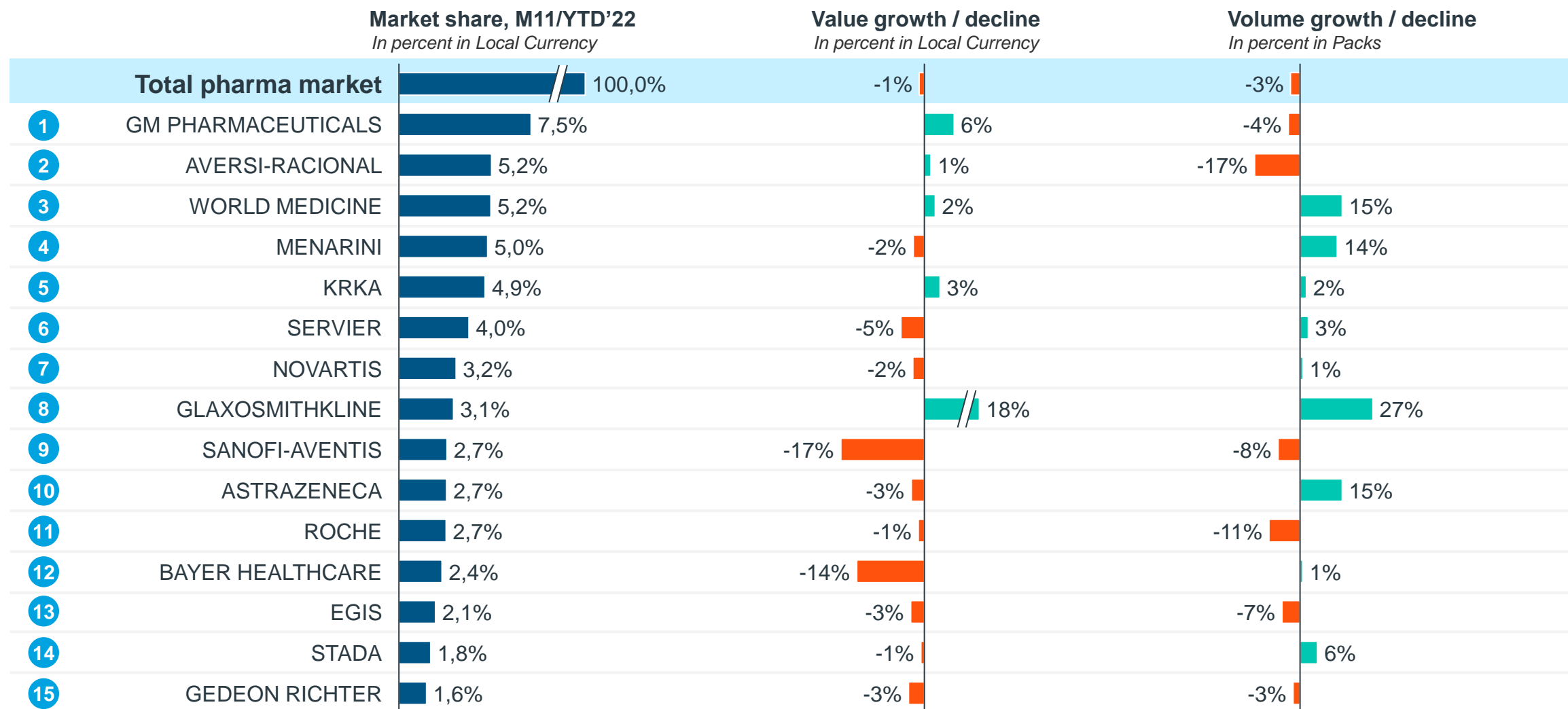


INFLATION

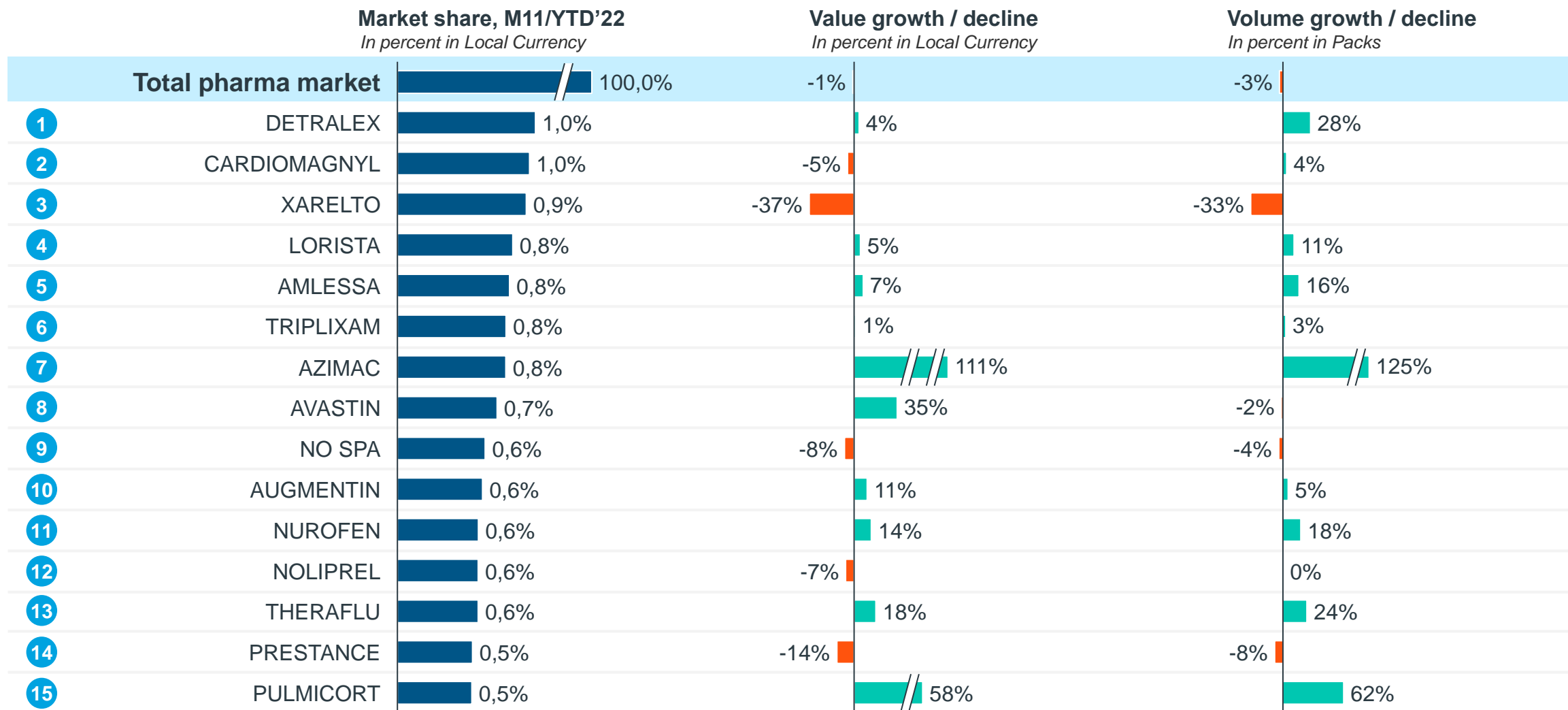


Indicator	GEL	USD	EUR	PACKS
Value M11/YTD'22, Bln.	1,0	0,33	0,31	0,11
Growth M11/YTD'22, %	▼ -1,1%	▲ 9,0%	▲ 23%	▼ -3,5%

TOP-15 corporations on Georgia market, November 2022



TOP-15 brands on Georgia market, November 2022



Azerbaijan pharma market dynamics in November 2022

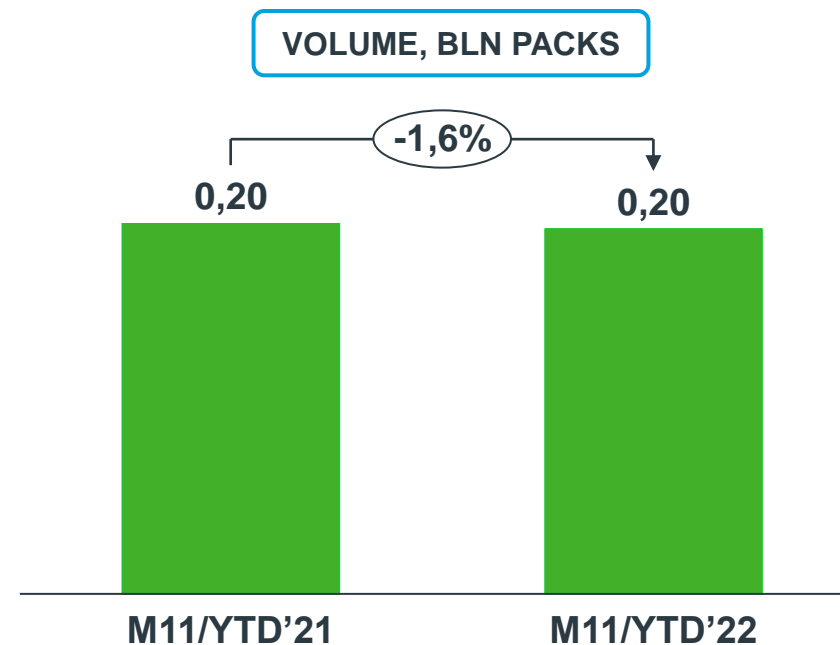
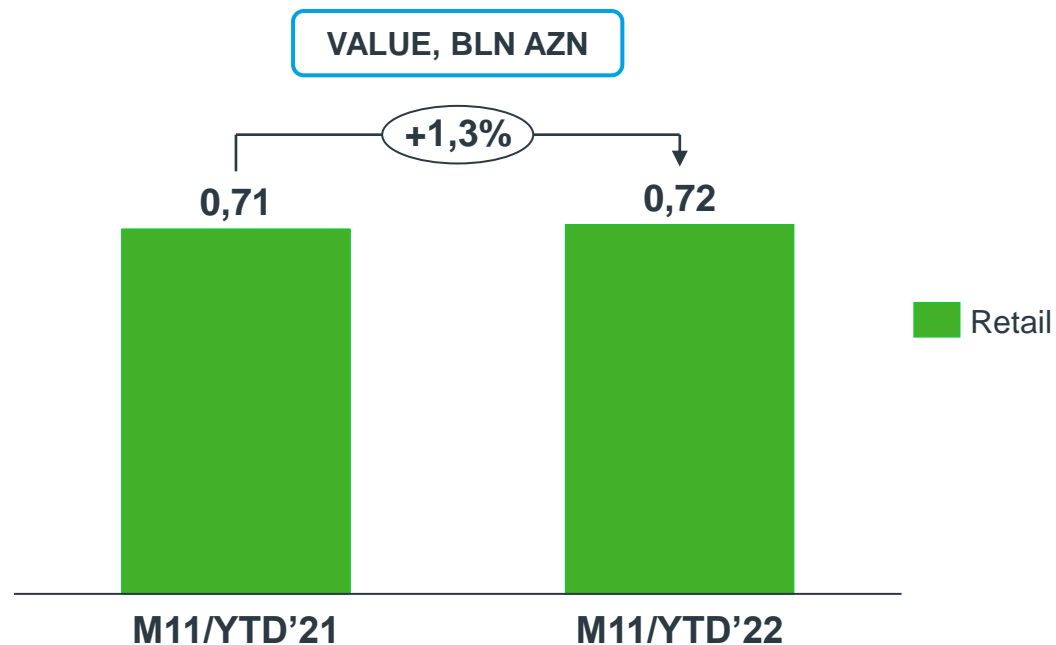
Market grew by 1,3% in value and dropped by 1,6% in volume



14%

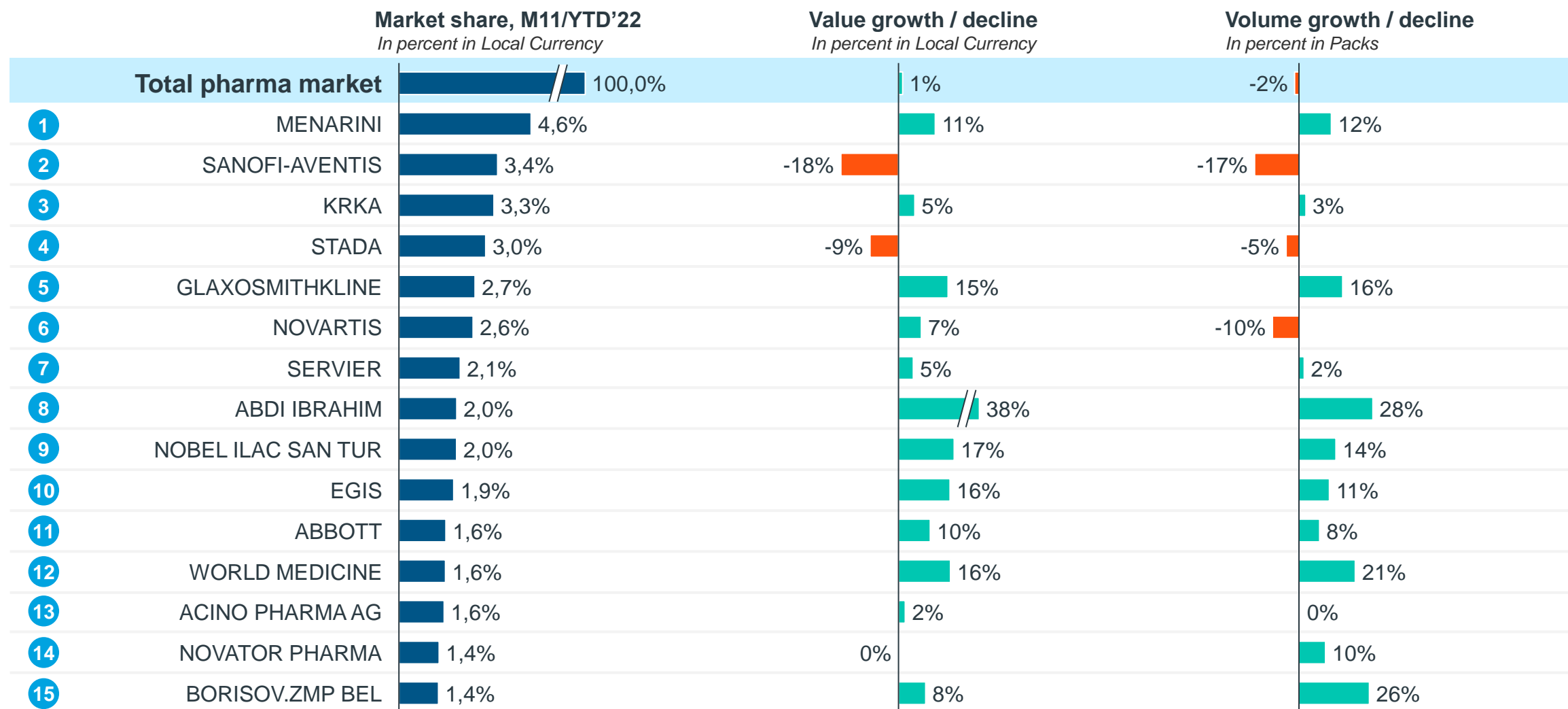


INFLATION

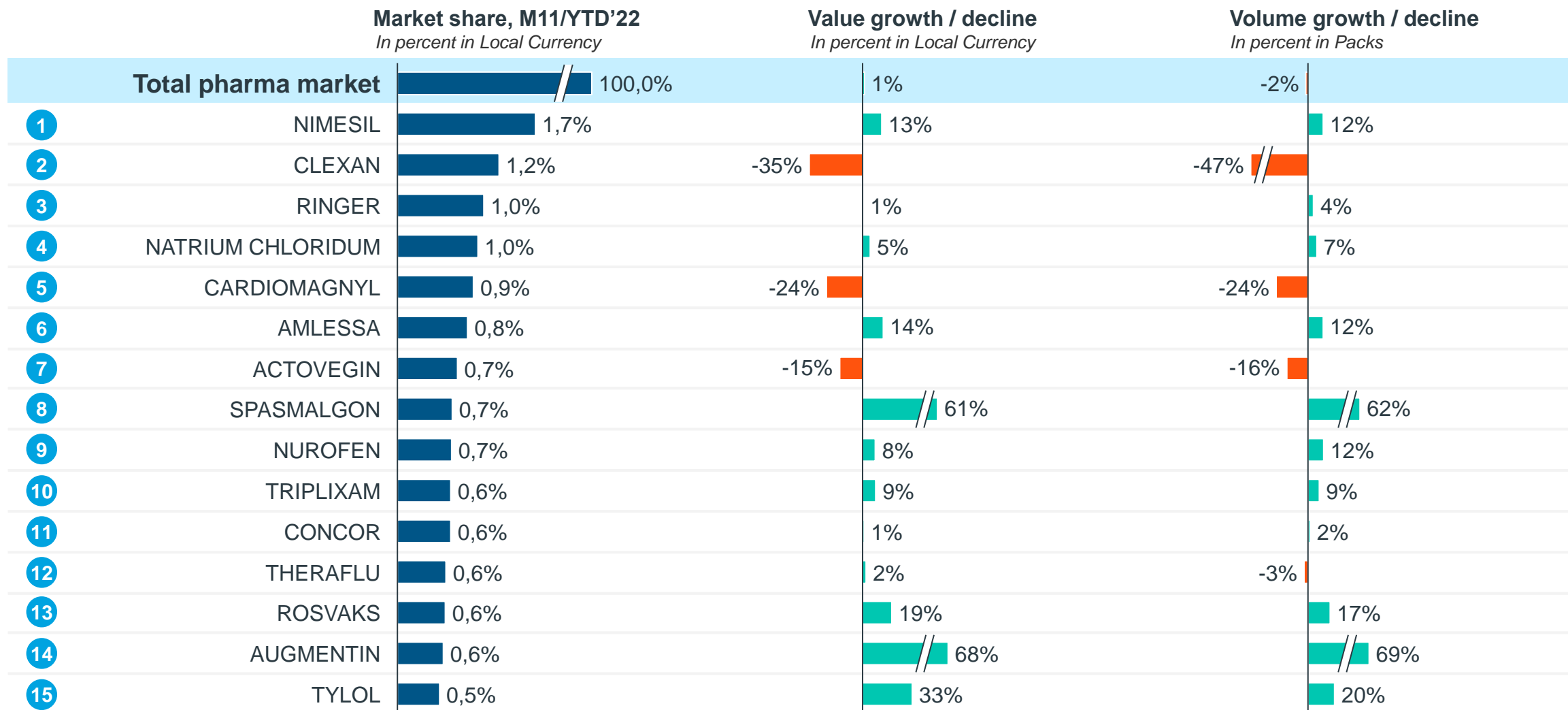


Indicator	AZN	USD	EUR	PACKS
Value M11/YTD'22, Bln.	0,72	0,42	0,40	0,20
Growth M11/YTD'22, %	▲ 1,3%	▲ 1,3%	▲ 14%	▼ -1,6%

TOP-15 corporations on Azerbaijan market, November 2022



TOP-15 brands on Azerbaijan market, November 2022



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