

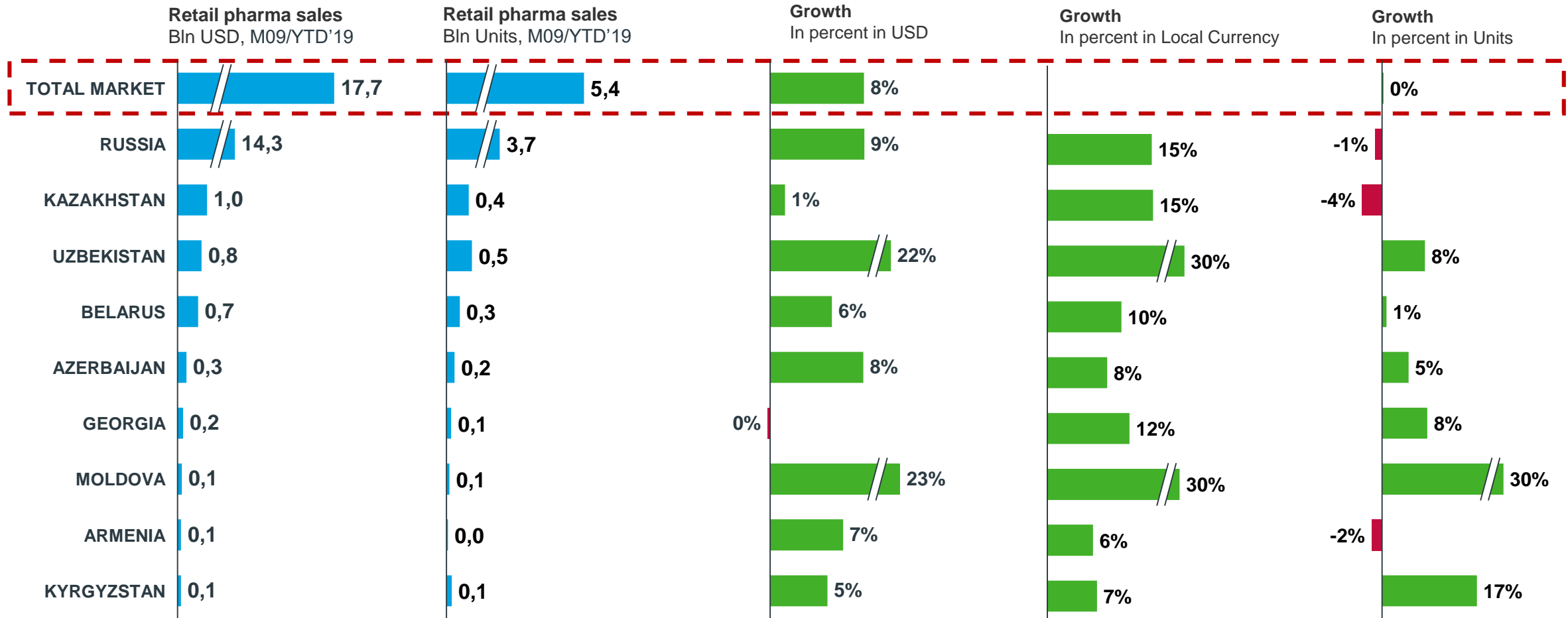


# Facts from IQVIA

M09 2019

# EAEU & CIS, Russia Countries ranking in January-September 2019, Total market, Value in Bln. USD and Units

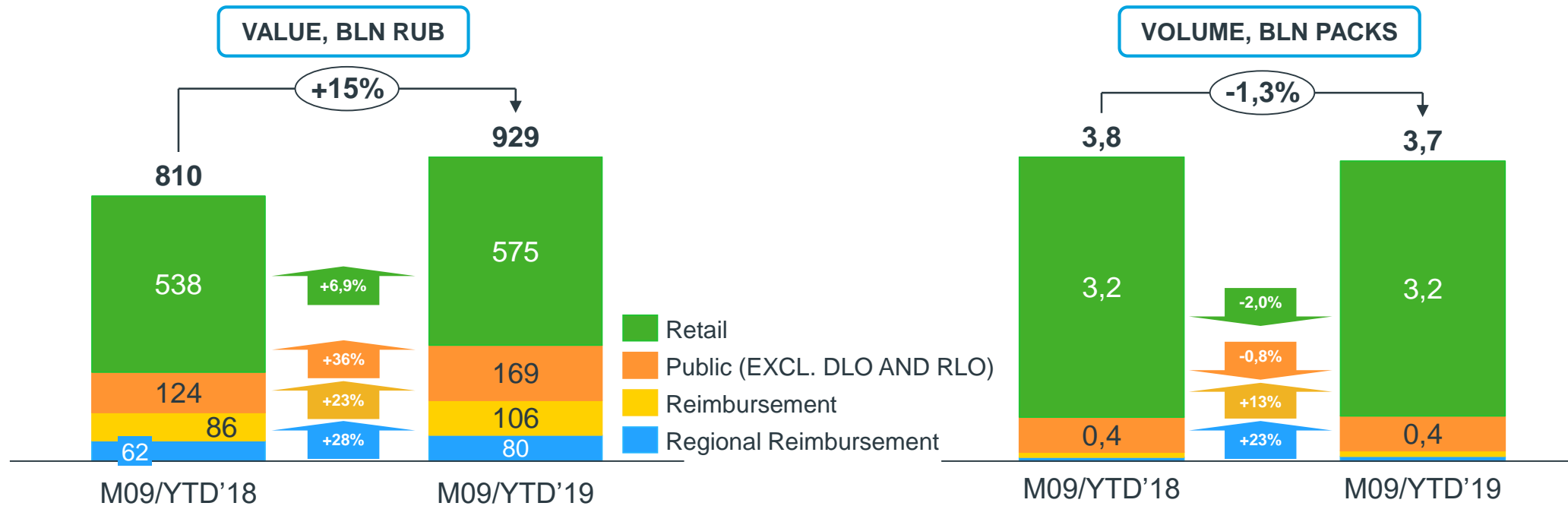
Total Market increases by 8% in USD and by 0,3% in volume





# Russian pharma market growth in January-September 2019

Market grew by 15% in value and decreased by 1,3% in volume

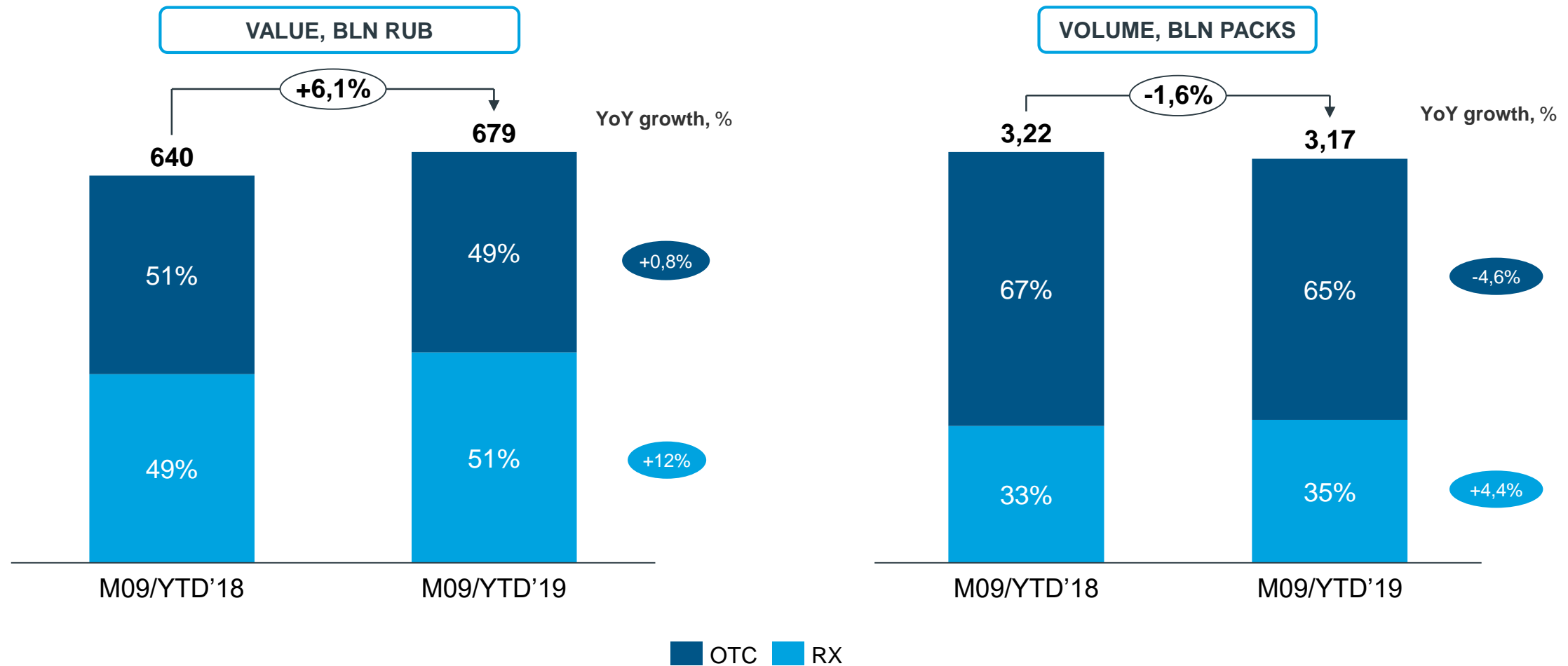


Indicator	RUB	USD	EUR	PACKS
Value M09/YTD'19, Bln.	929	14,3	12,7	3,7
Growth M09/YTD'19%	▲ 15%	▲ 8,5%	▲ 15%	▼ -1,3%



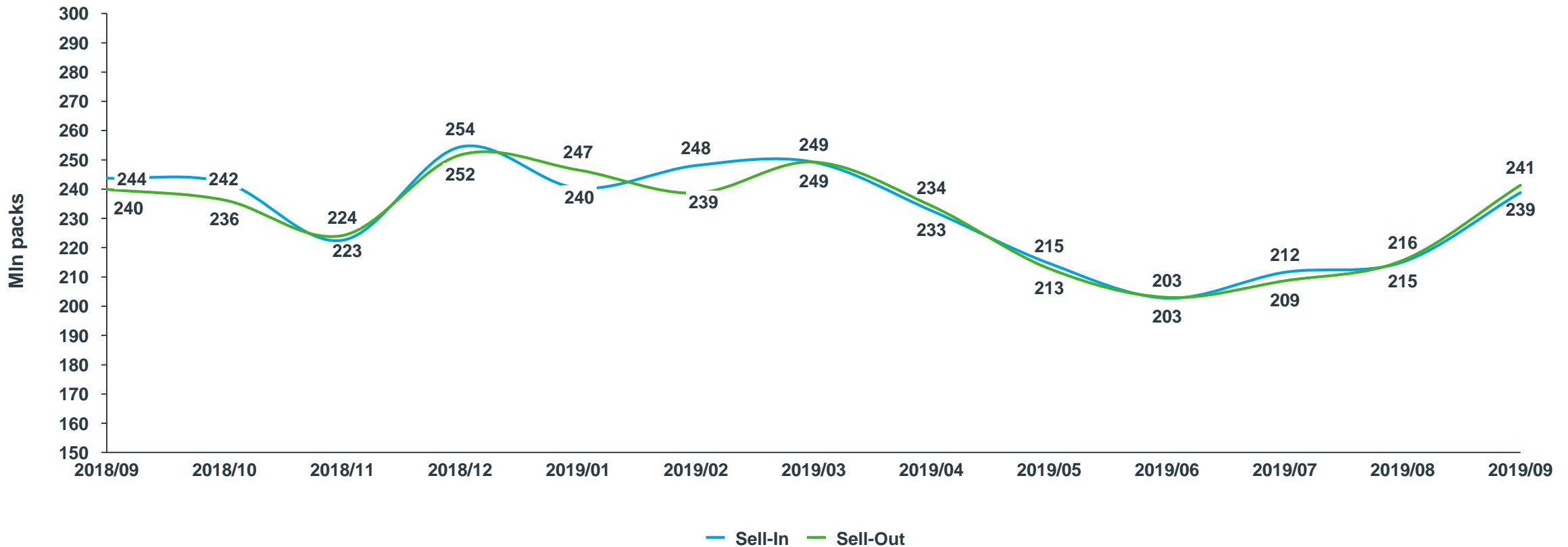
# Russian pharma market growth in January-September 2019

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



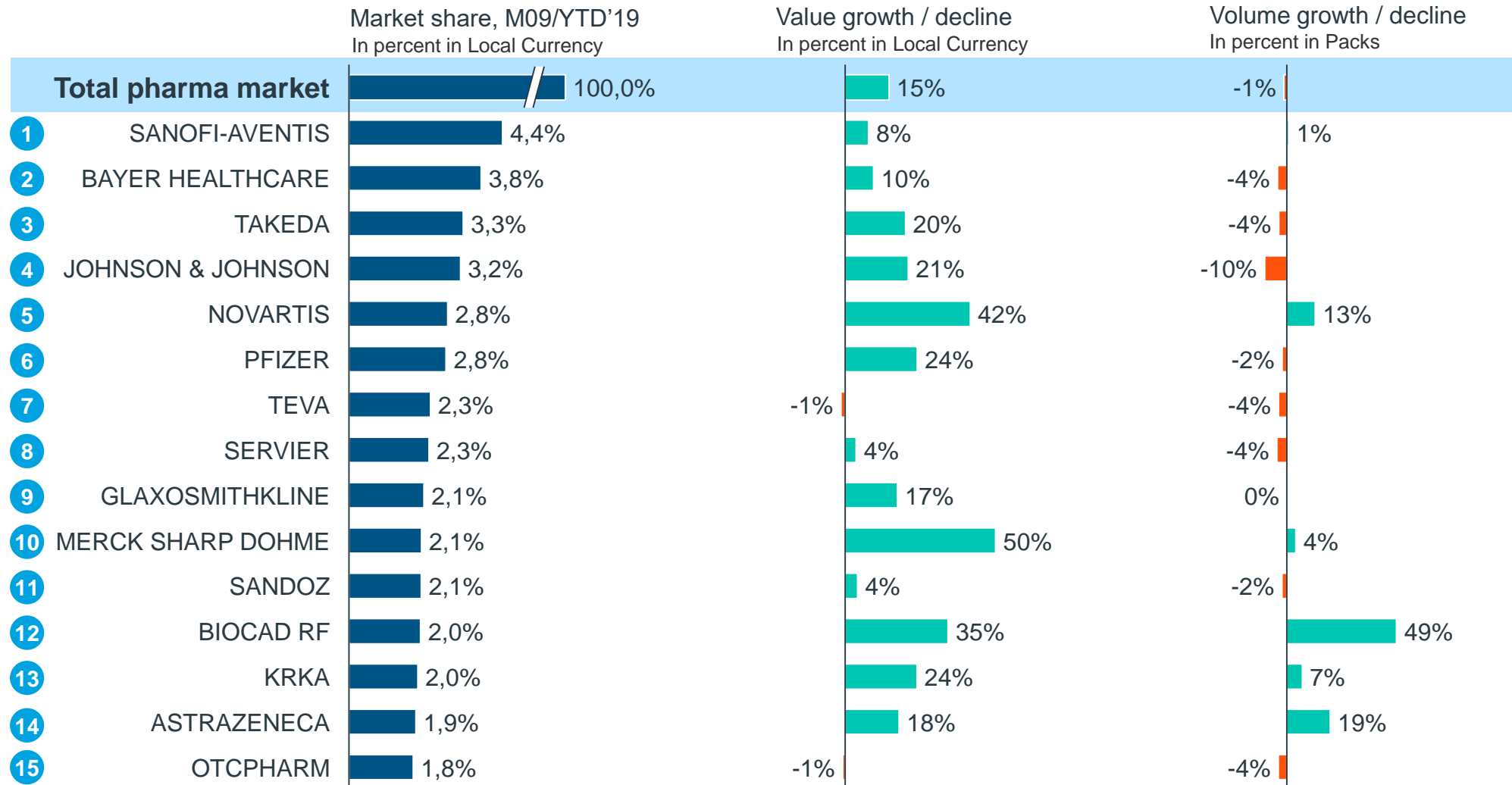


# Sell-In vs Sell-Out, OTC registered drugs



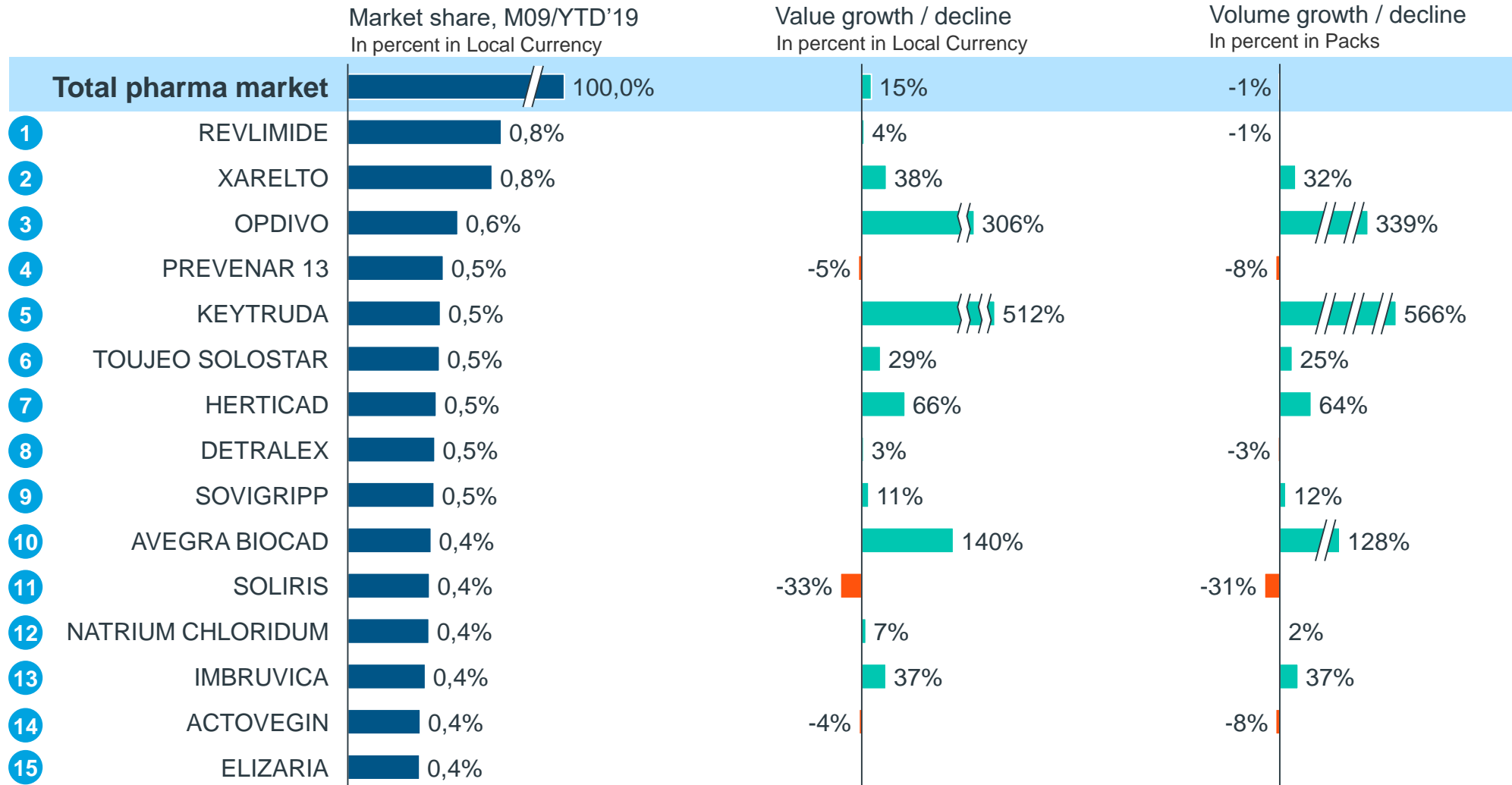


# TOP-15 corporations on Russian market, January-September 2019



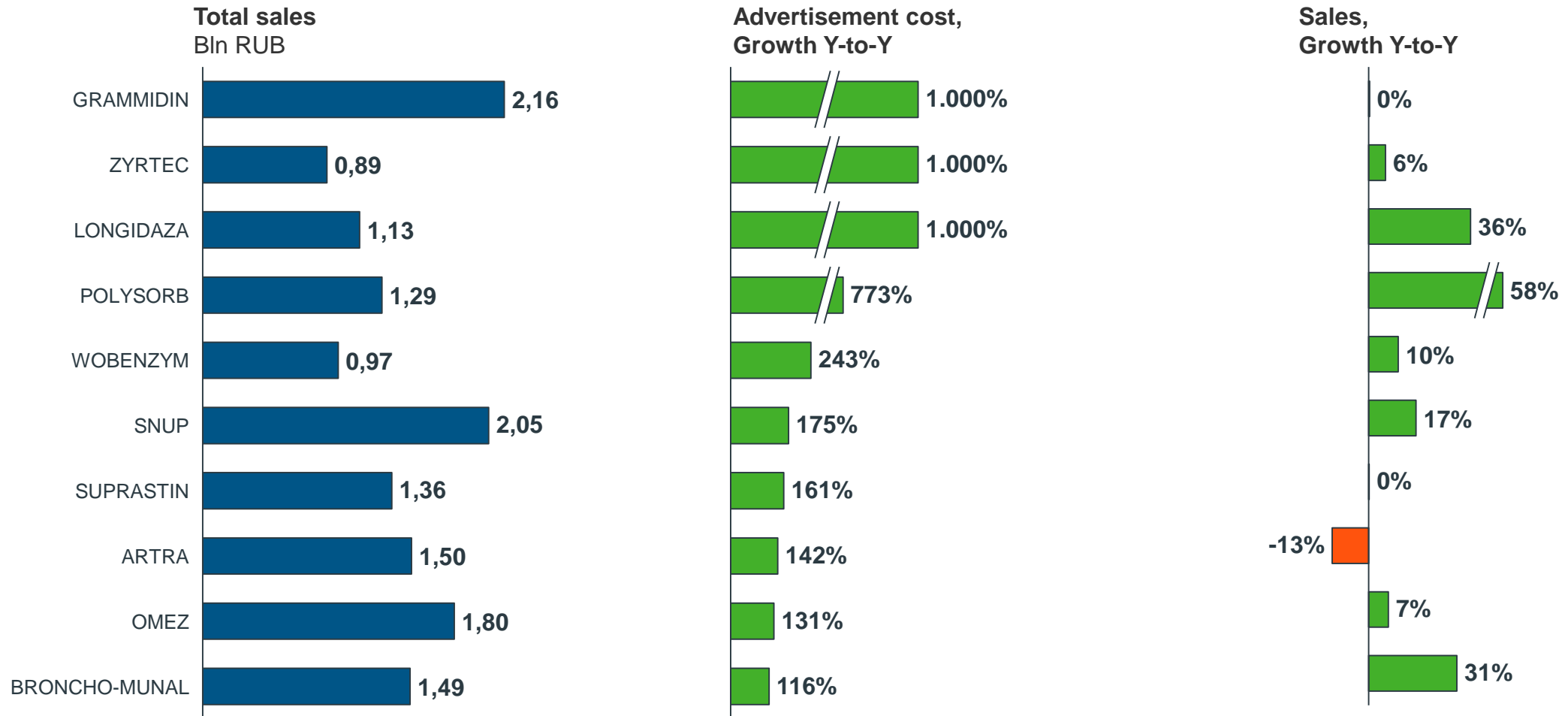


# TOP-15 brands on Russian market, January-September 2019



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

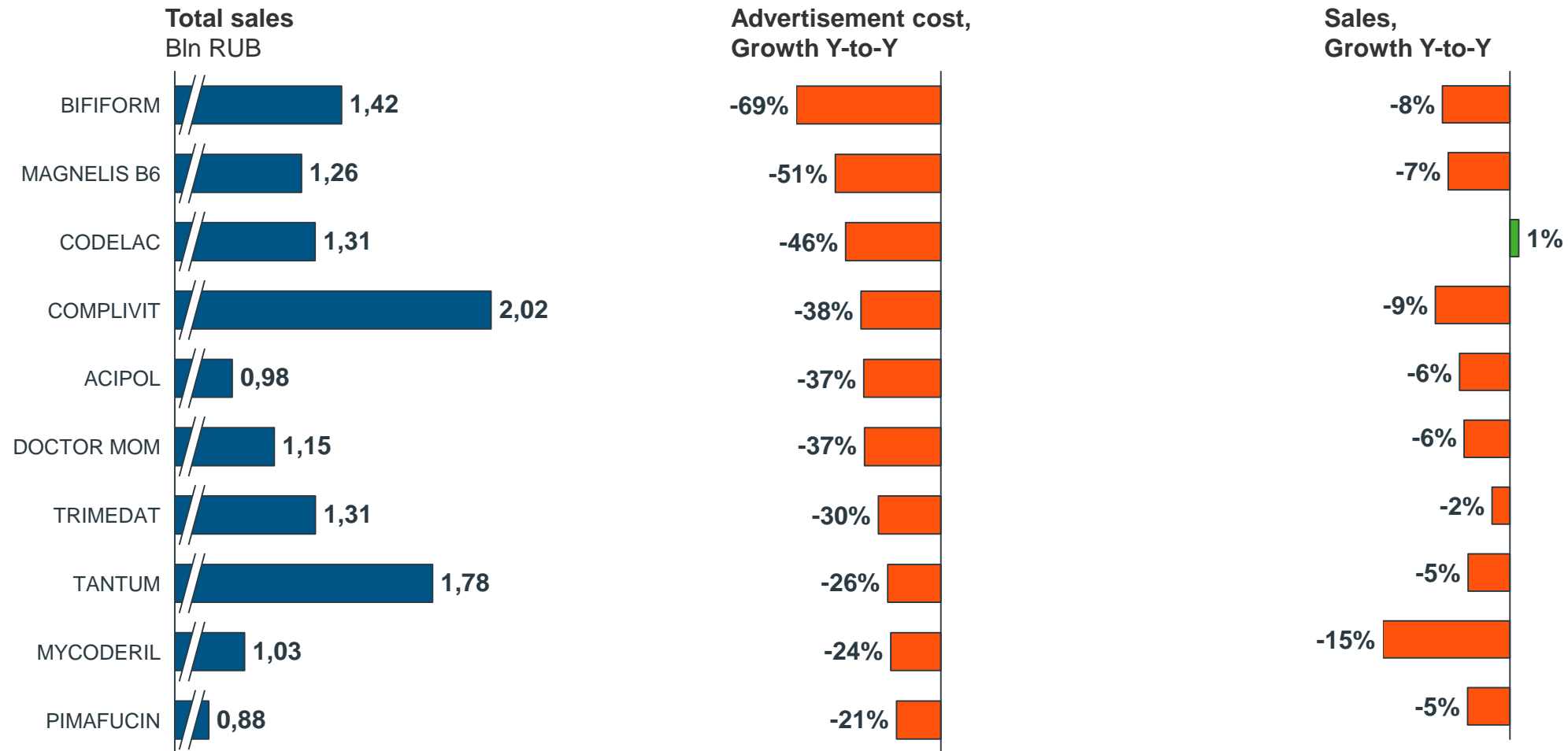
# TOP-10 products by growth in advertisement investments in January-September 2019



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-September 2019



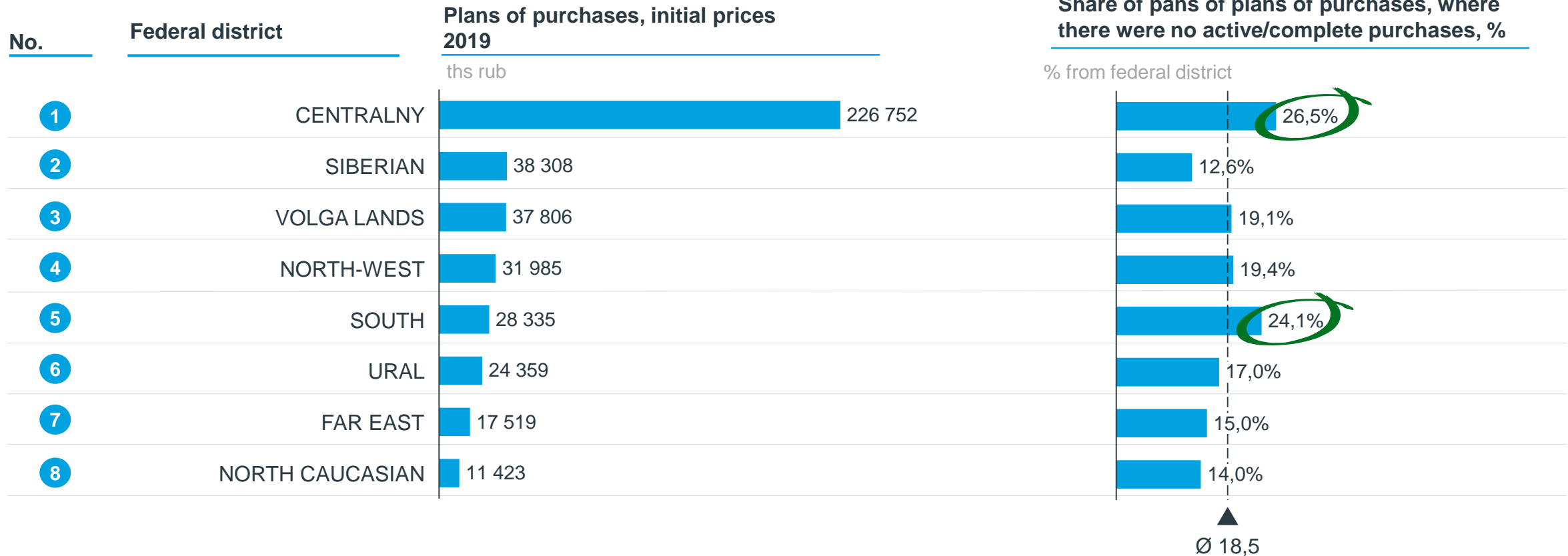
The rank is calculated among TOP-200 Brands by sales with advertising cost greater than 50 mln RUB  
 Source: IQVIA databases, Pharamtrend, Mediascope data, FIN Prices

## Special focus – tender market



# Central and South FD have the highest share of non-published purchases

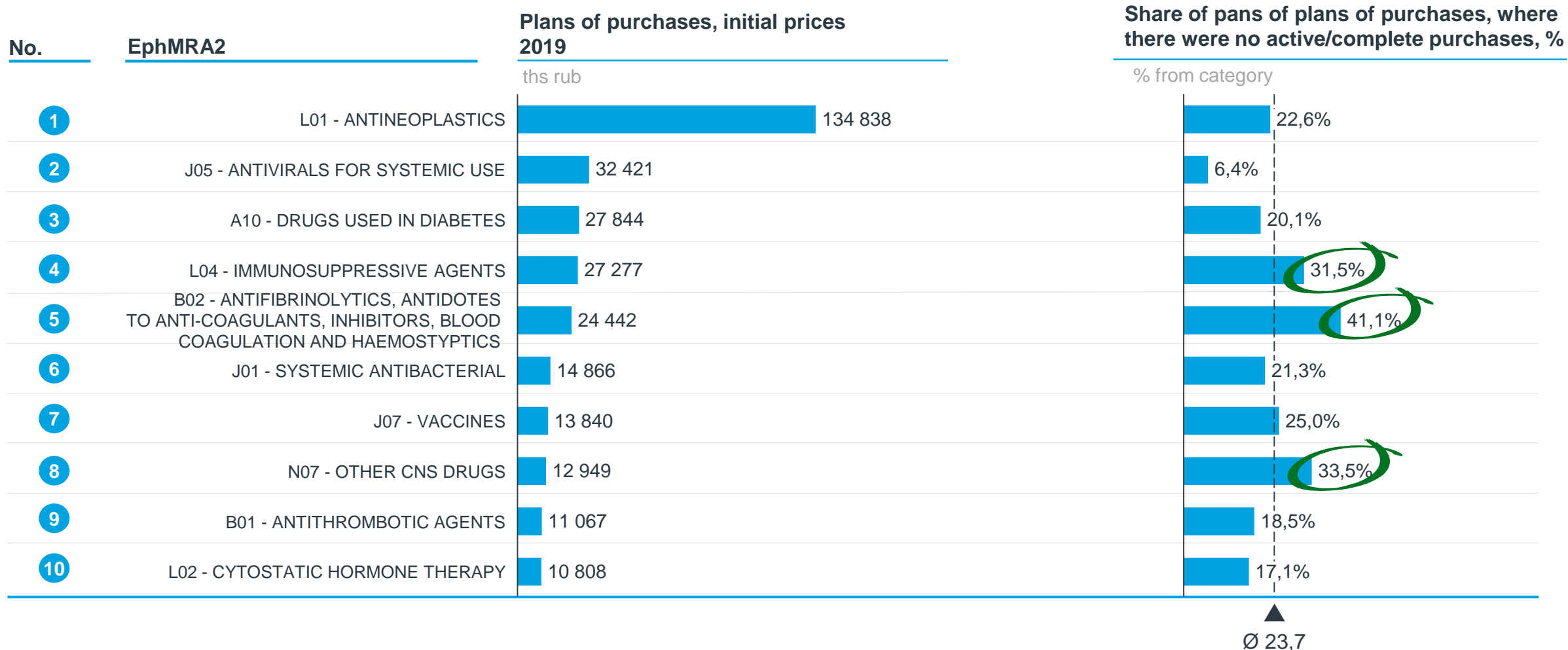
## Rating of Federal Districts in plans of purchases in 2019



# Immunosuppressive, antifibrinolytics and CNS drugs have highest share of non-published purchases in 2019



## TOP-10 EphMRA 2 groups by value in plans of purchases in 2019

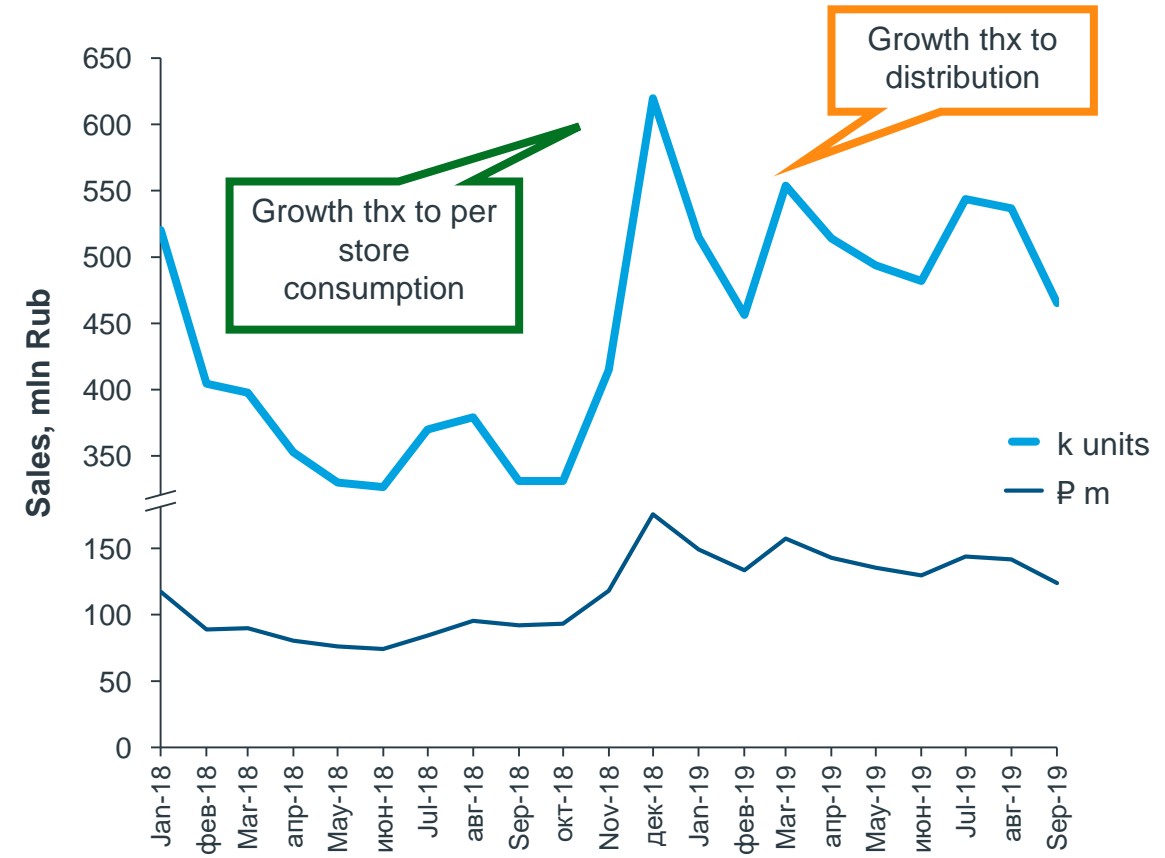
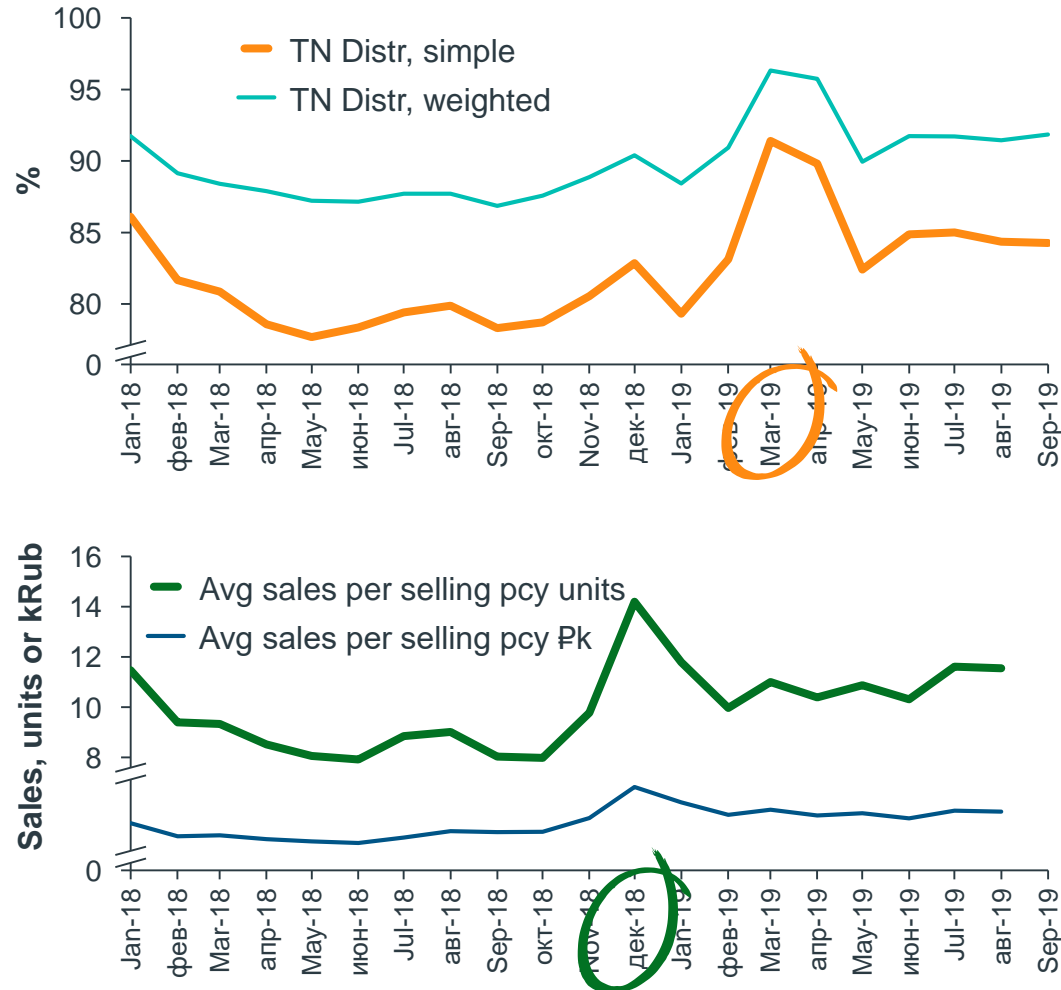


## Special focus – new PharmaTrend measurements

# IQVIA PharmaTrend in Russia now also features average packs sold per trade name and selling pharmacy to detect sales drivers



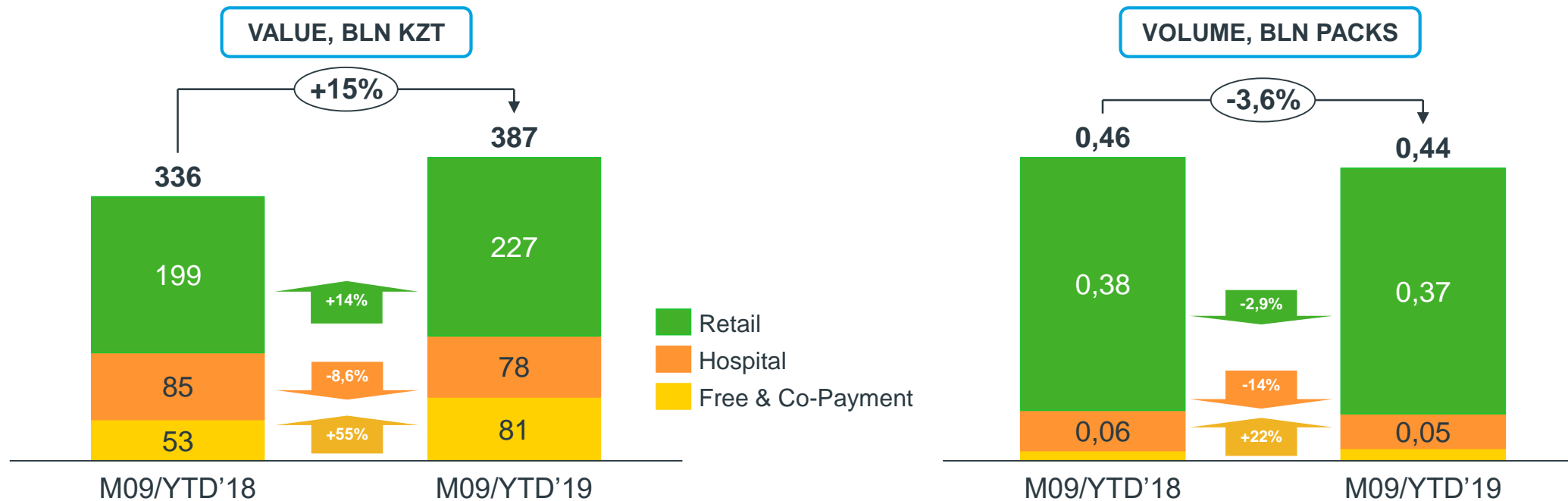
*In this real example (Polisorb), December sales were mainly driven by more packs sold per store (promotion), while in March, the extended distribution (# of stores) was the main sales driver*





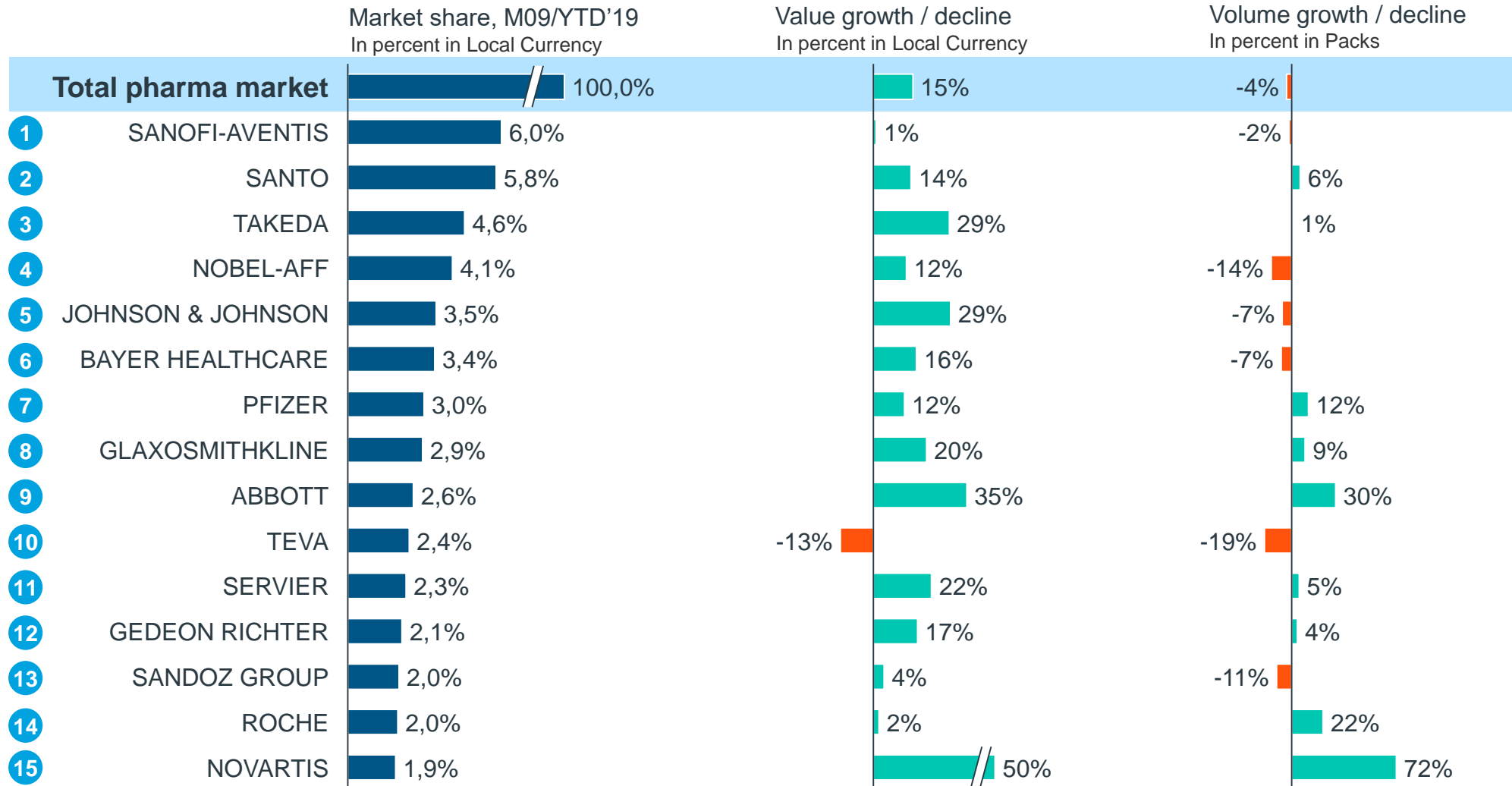
# Kazakhstan pharma market growth in January-September 2019

Market grew by 15% in value and decreased by 3,6% in volume



Indicator	KZT	USD	EUR	PACKS
Value M09/YTD'19, Bln.	387	1,01	0,90	0,44
Growth M09/YTD'19%	▲ 15%	▲ 1,3%	▲ 7,8%	▼ -3,6%

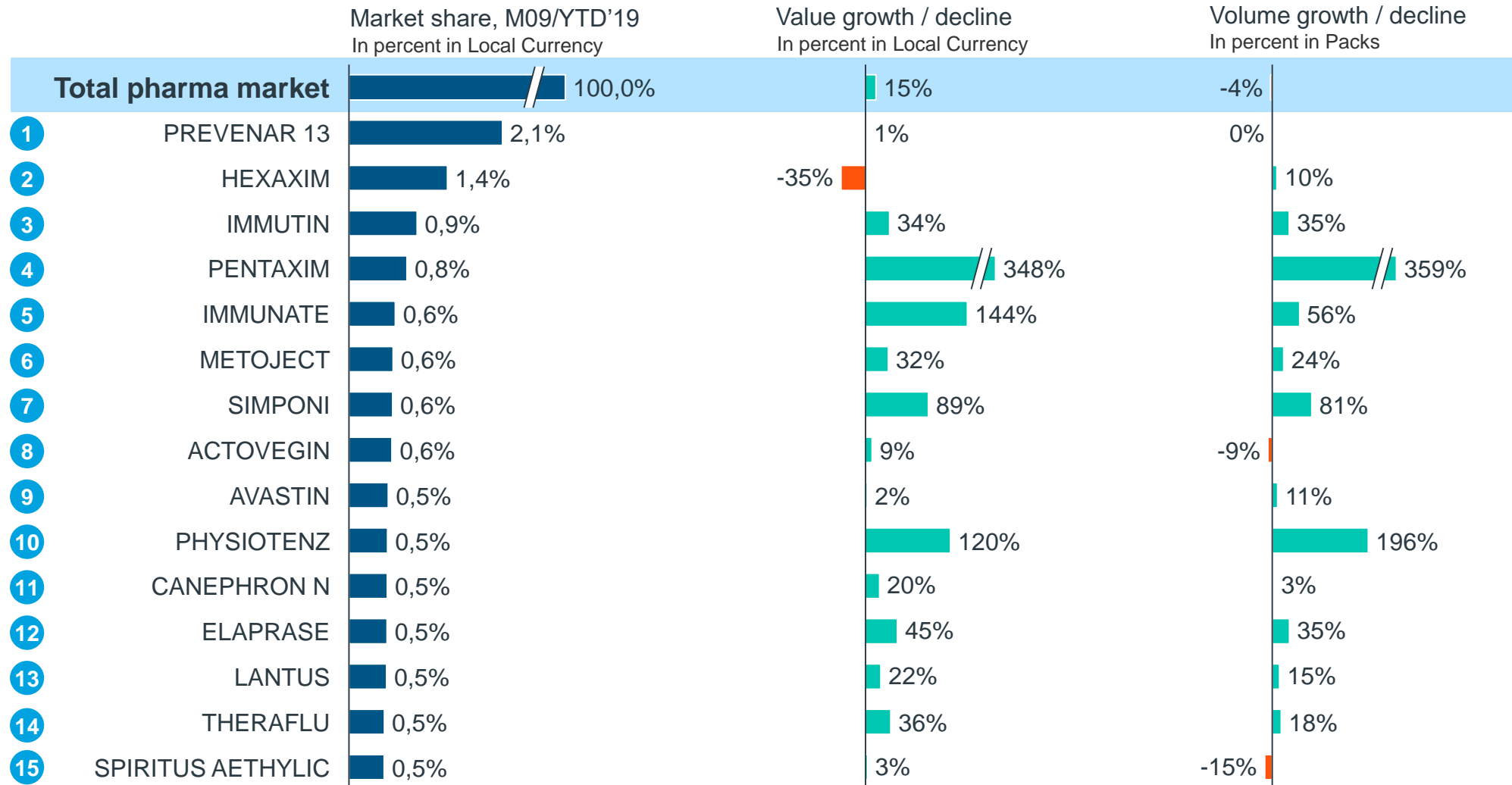
# TOP-15 corporations on Kazakhstan market, January-September 2019







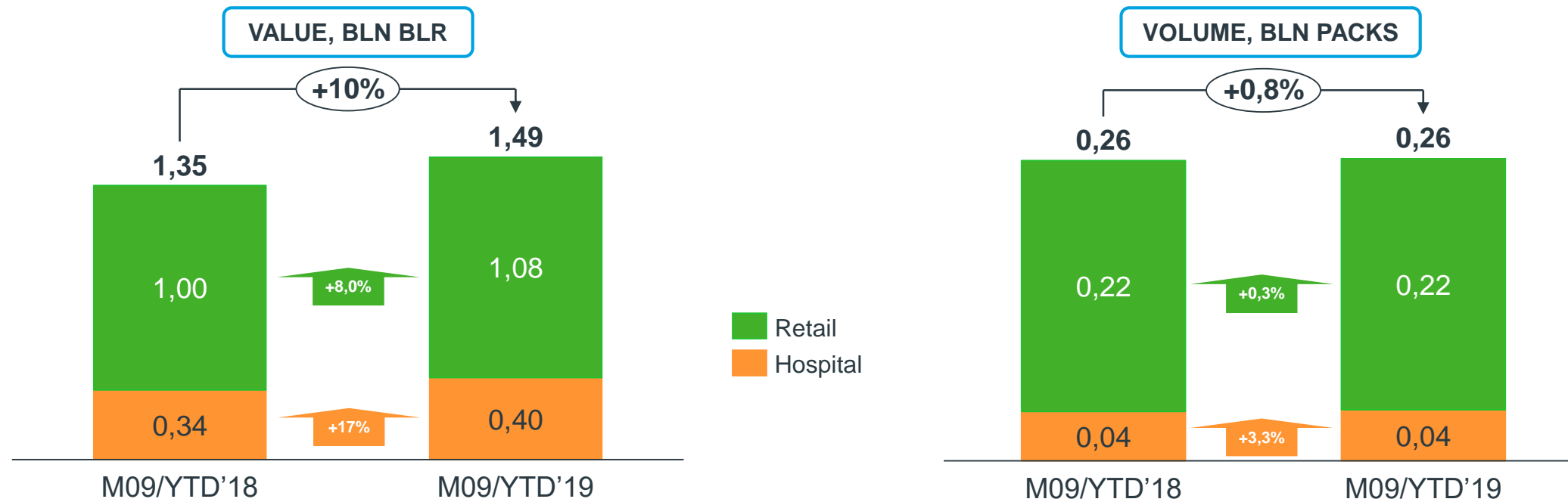
# TOP-15 brands on Kazakhstan market, January-September 2019





# Belarus pharma market growth in January-September 2019

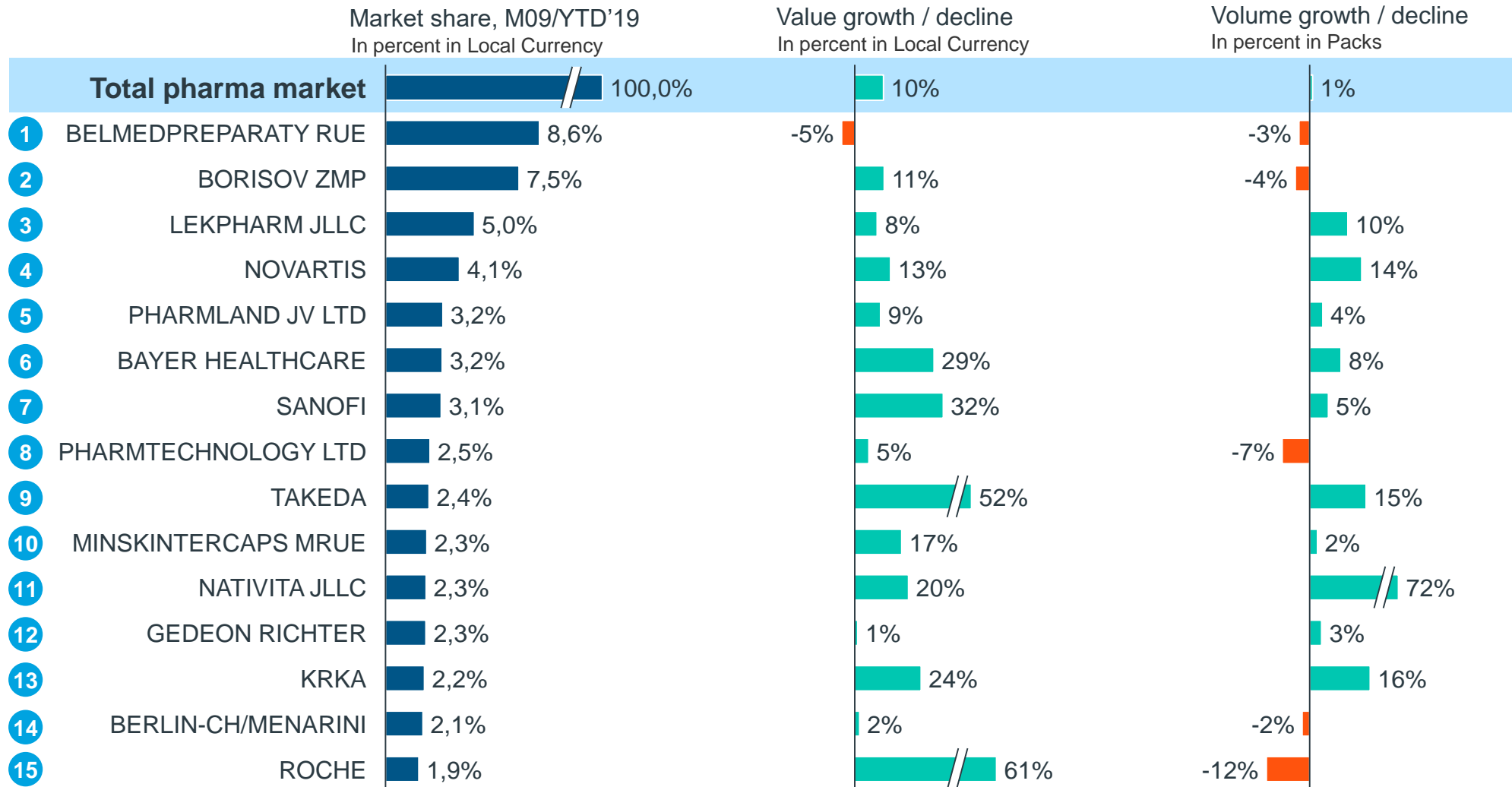
Market grew by 10% in value and by 0,8% in volume



Indicator	BLR	USD	EUR	PACKS
Value M09/YTD'19, Bln.	1,49	0,71	0,63	0,26
Growth M09/YTD'19%	▲ 10%	▲ 5,6%	▲ 12%	▲ 0,8%

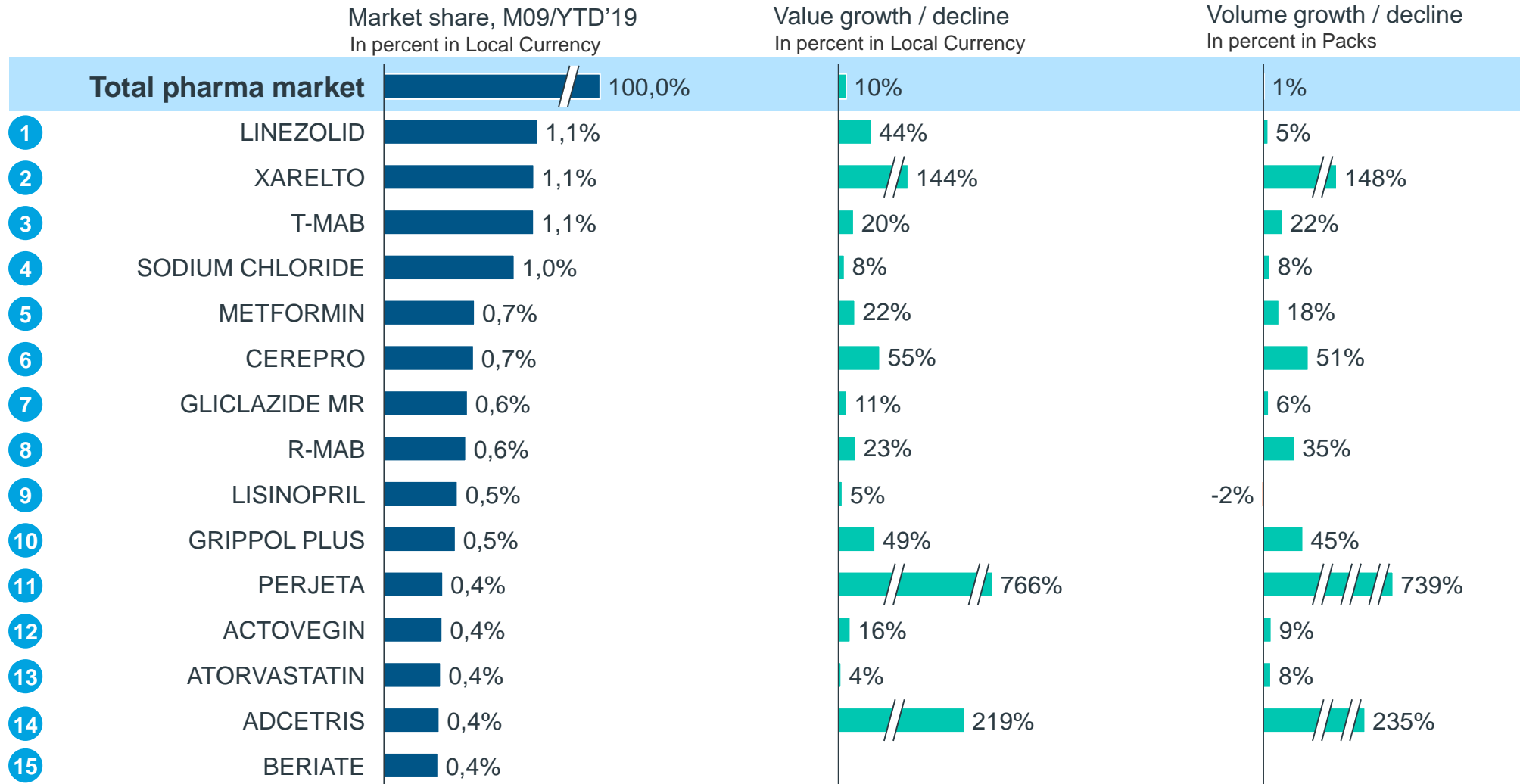


# TOP-15 corporations on Belarus market, January-September 2019





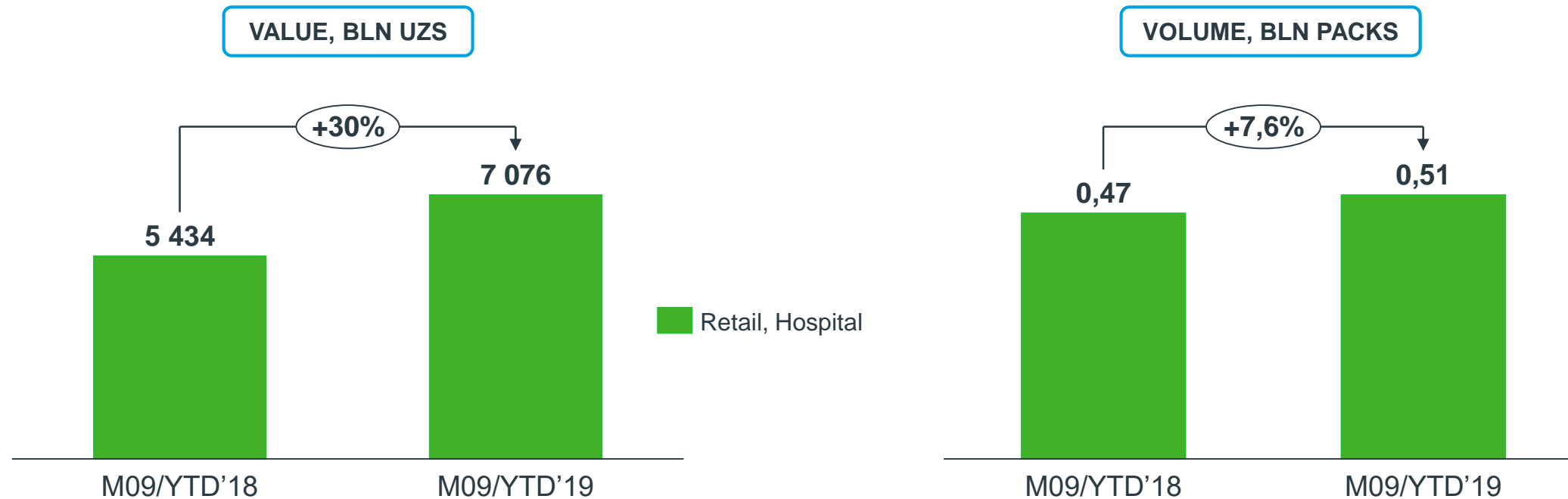
# TOP-15 brands on Belarus market, January-September 2019





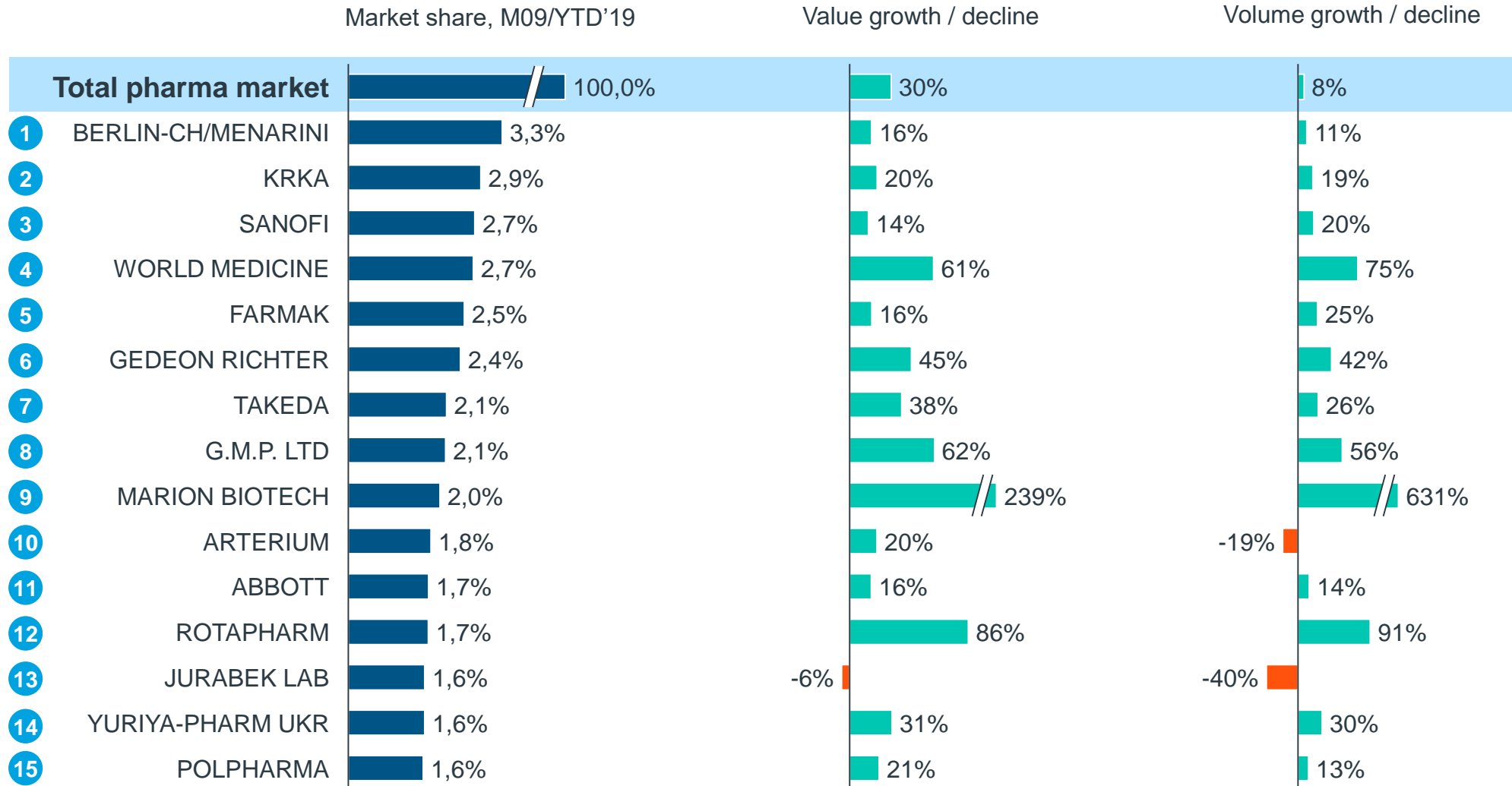
# Uzbekistan pharma market growth in January-September 2019

Market grew by 30% in value and by 7,6% in volume



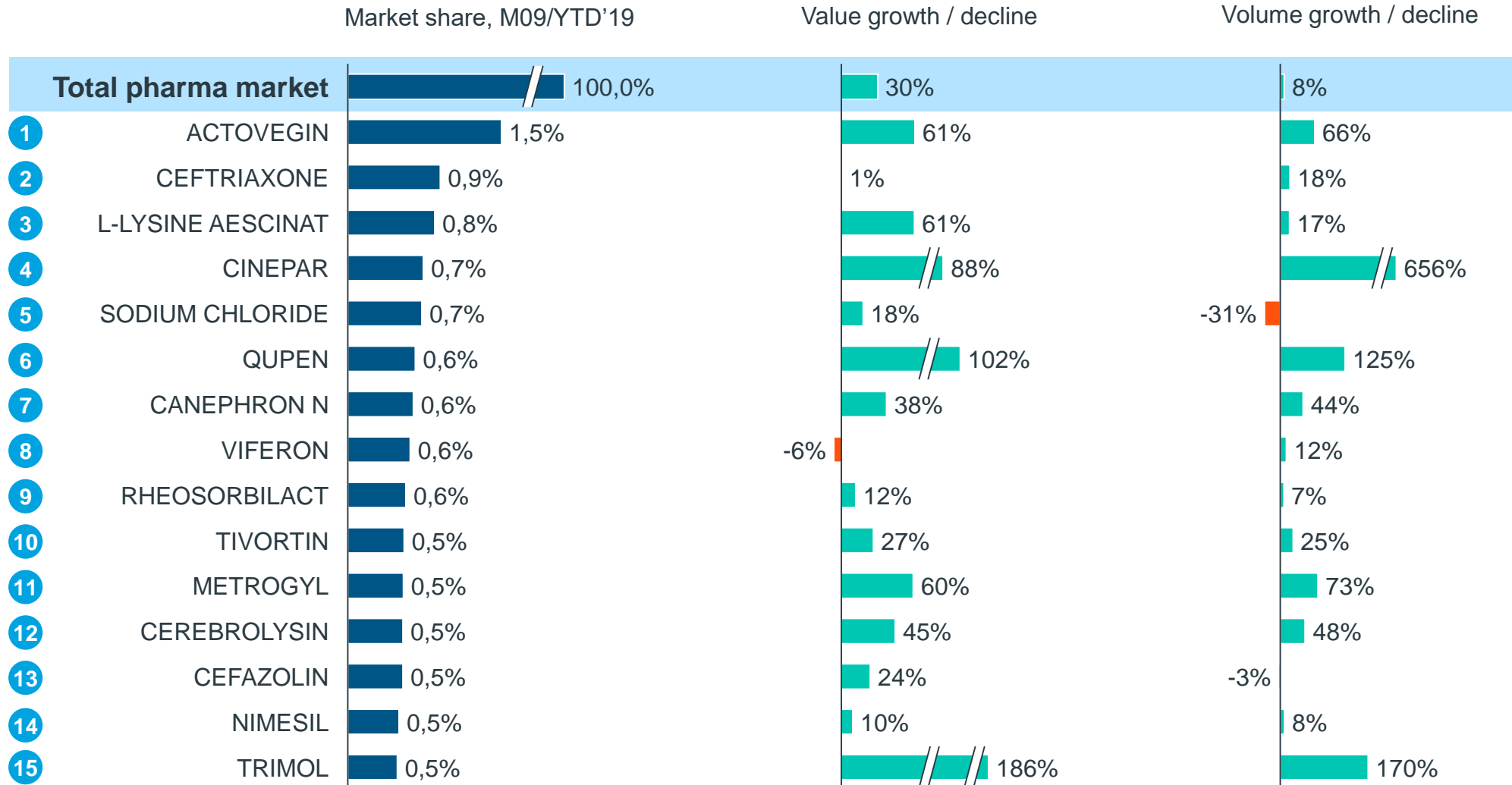
Indicator	UZS	USD	EUR	PACKS
Value M09/YTD'19, Bln.	7 076	0,83	0,74	0,51
Growth M09/YTD'19%	▲ 30%	▲ 22%	▲ 29%	▲ 7,6%

# TOP-15 corporations on Uzbekistan market, January-September 2019





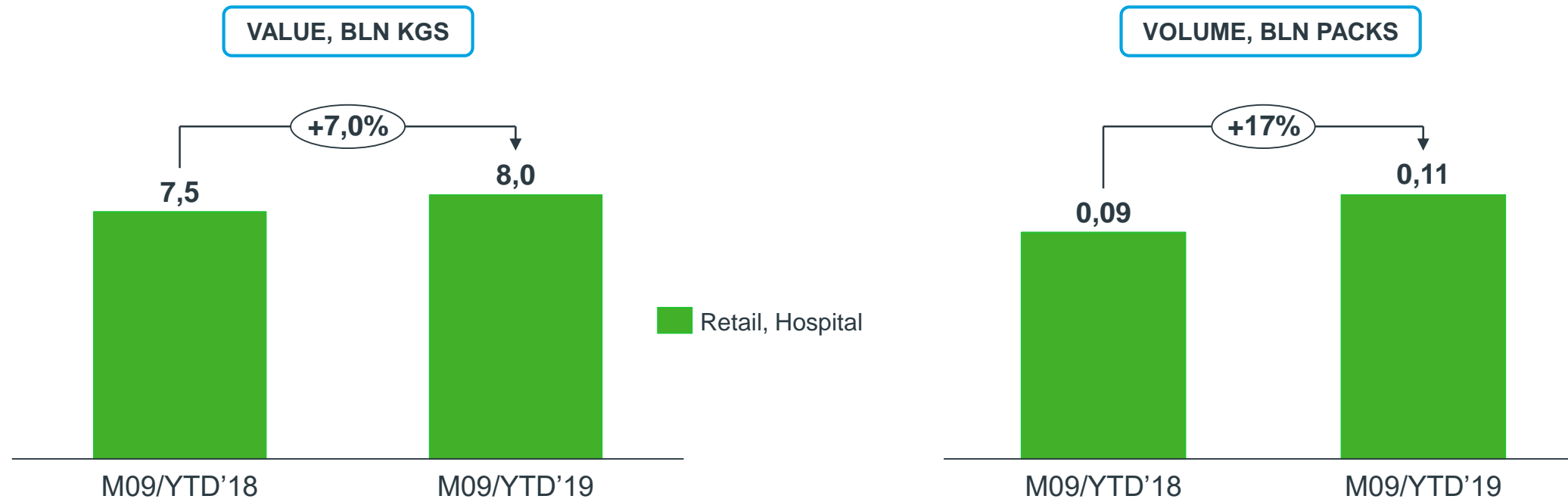
# TOP-15 brands on Uzbekistan market, January-September 2019





# Kyrgyzstan pharma market growth in January-September 2019

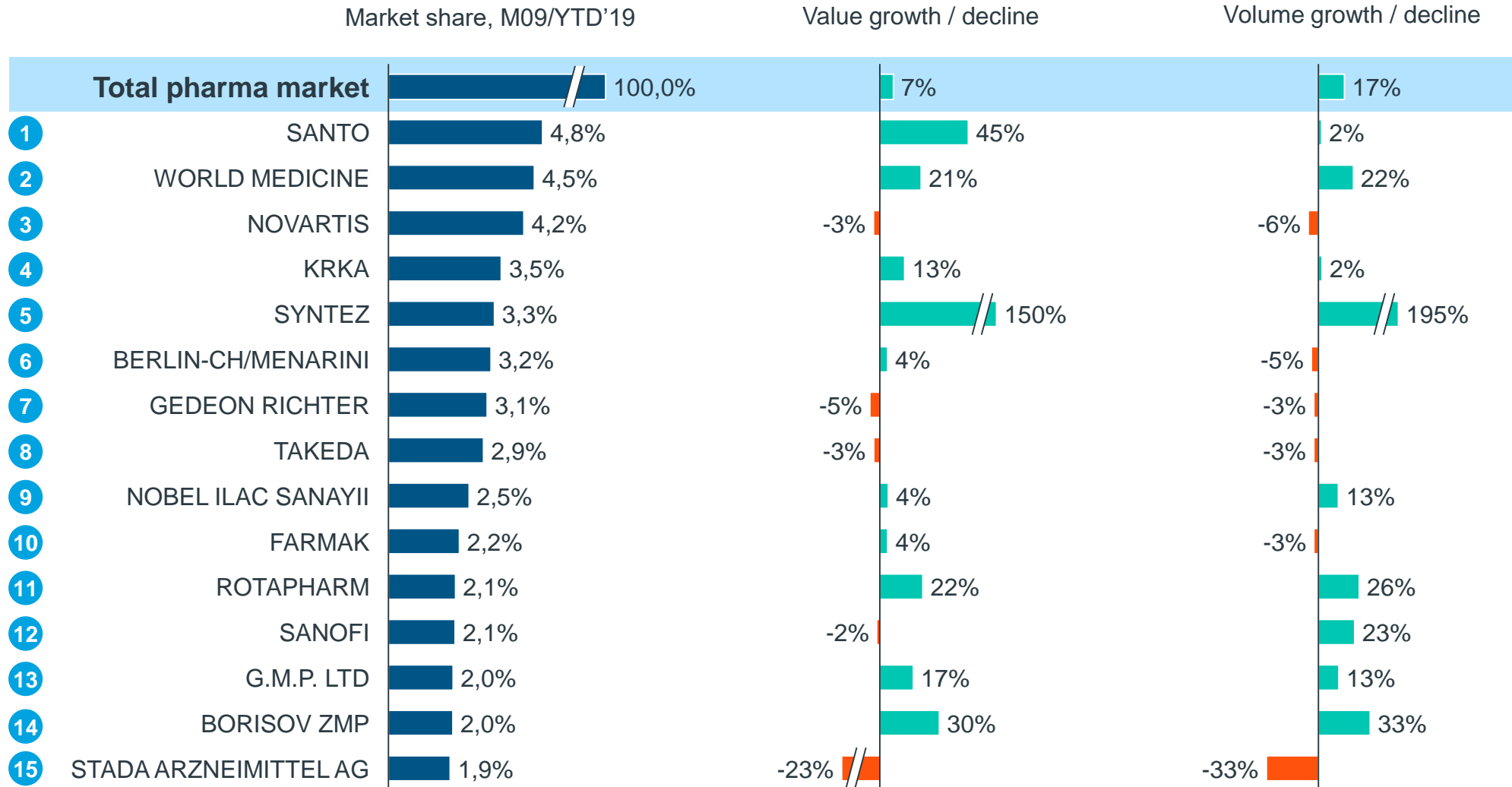
Market grew by 7,0% in value and by 17% in volume



Indicator	KGS	USD	EUR	PACKS
Value M09/YTD'19, Bln.	8,0	0,11	0,10	0,11
Growth M09/YTD'19%	▲ 7,0%	▲ 5,2%	▲ 12%	▲ 17%

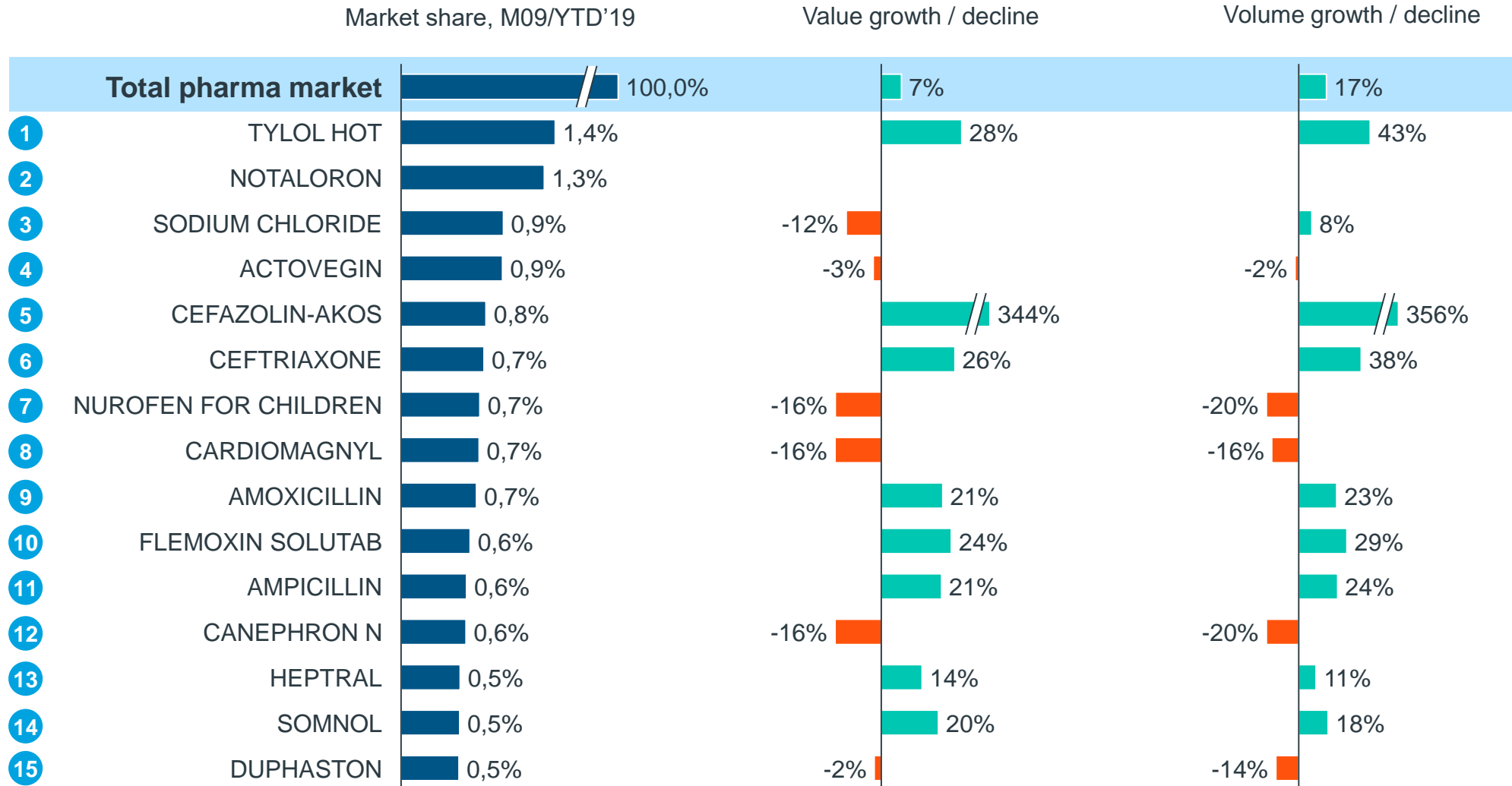


# TOP-15 corporations on Kyrgyzstan market, January-September 2019





# TOP-15 brands on Kyrgyzstan market, January-September 2019



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

# Please Contact Us for More Information



---

**Svetlana Nikulina**  
Sales Director

[svetlana.nikulina@IQVIA.com](mailto:svetlana.nikulina@IQVIA.com)  
+7 499 272 05 00

---

**Anton Kalyapin**  
Associate Director, Offering

[Anton.Kalyapin@IQVIA.com](mailto:Anton.Kalyapin@IQVIA.com)  
+7 499 272 05 00

---

**Nadezhda Kalinich**  
Client Service Representative

[Nadezhda.Kalinich@IQVIA.com](mailto:Nadezhda.Kalinich@IQVIA.com)  
+7 499 272 05 00