



Facts from IQVIA

M10 2022

Russian pharma market dynamics in October 2022

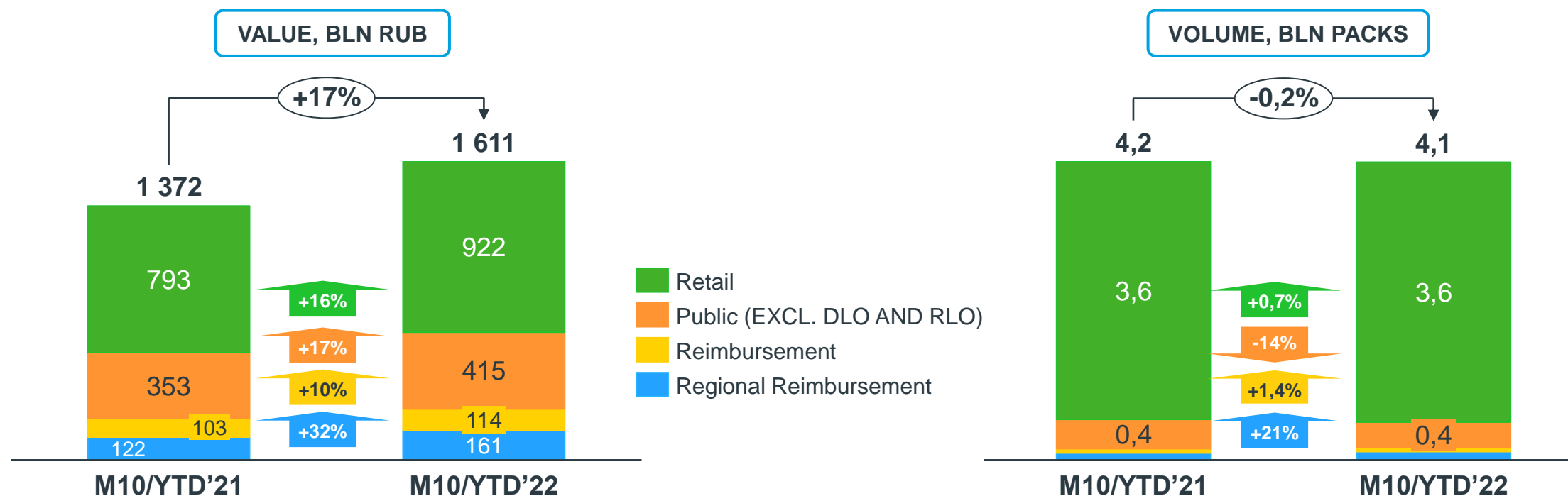
Market grew by 17% in value and dropped by 0,2% in volume



12,6%



INFLATION



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

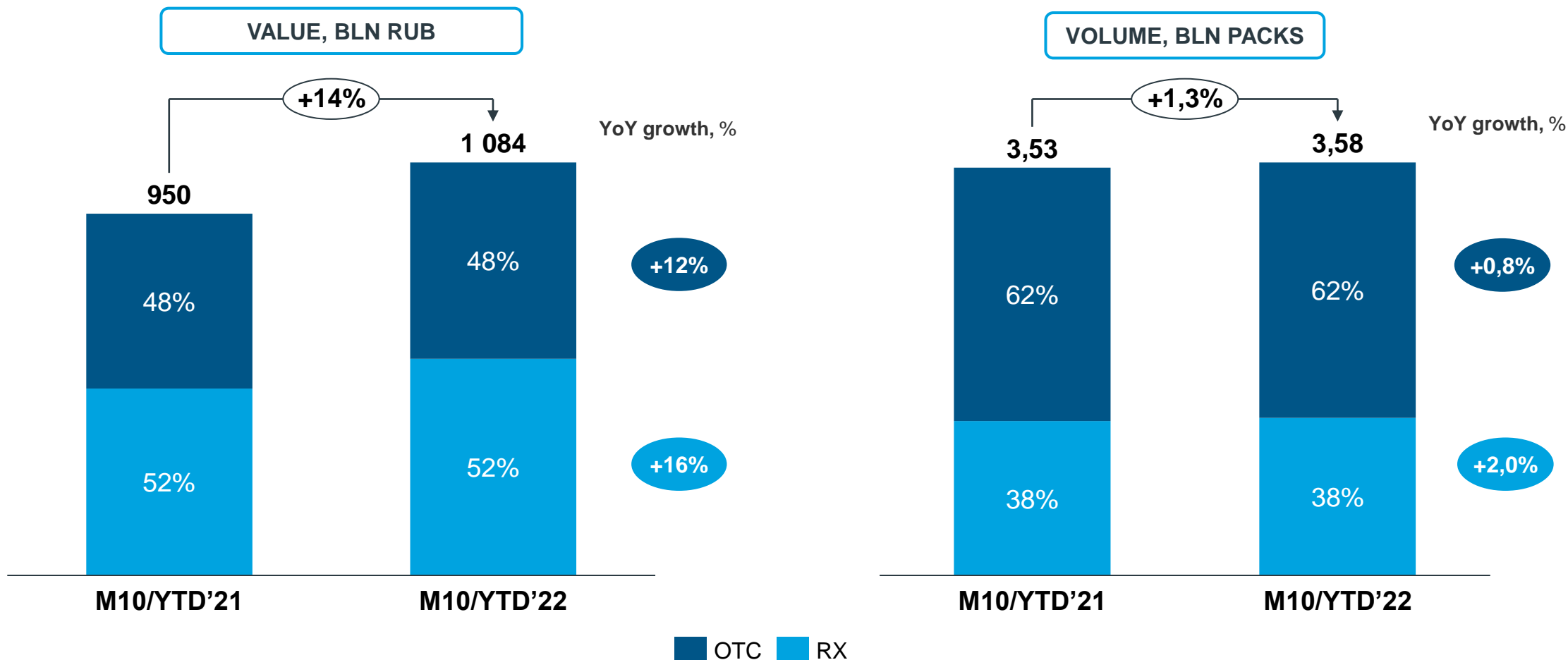
Indicator	RUB	USD	EUR	PACKS
Value M10/YTD'22, Bln.	1 611	23,6	22,6	4,1
Growth M10/YTD'22, %	▲ 17%	▲ 27%	▲ 44%	▼ -0,2%

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 October 2022



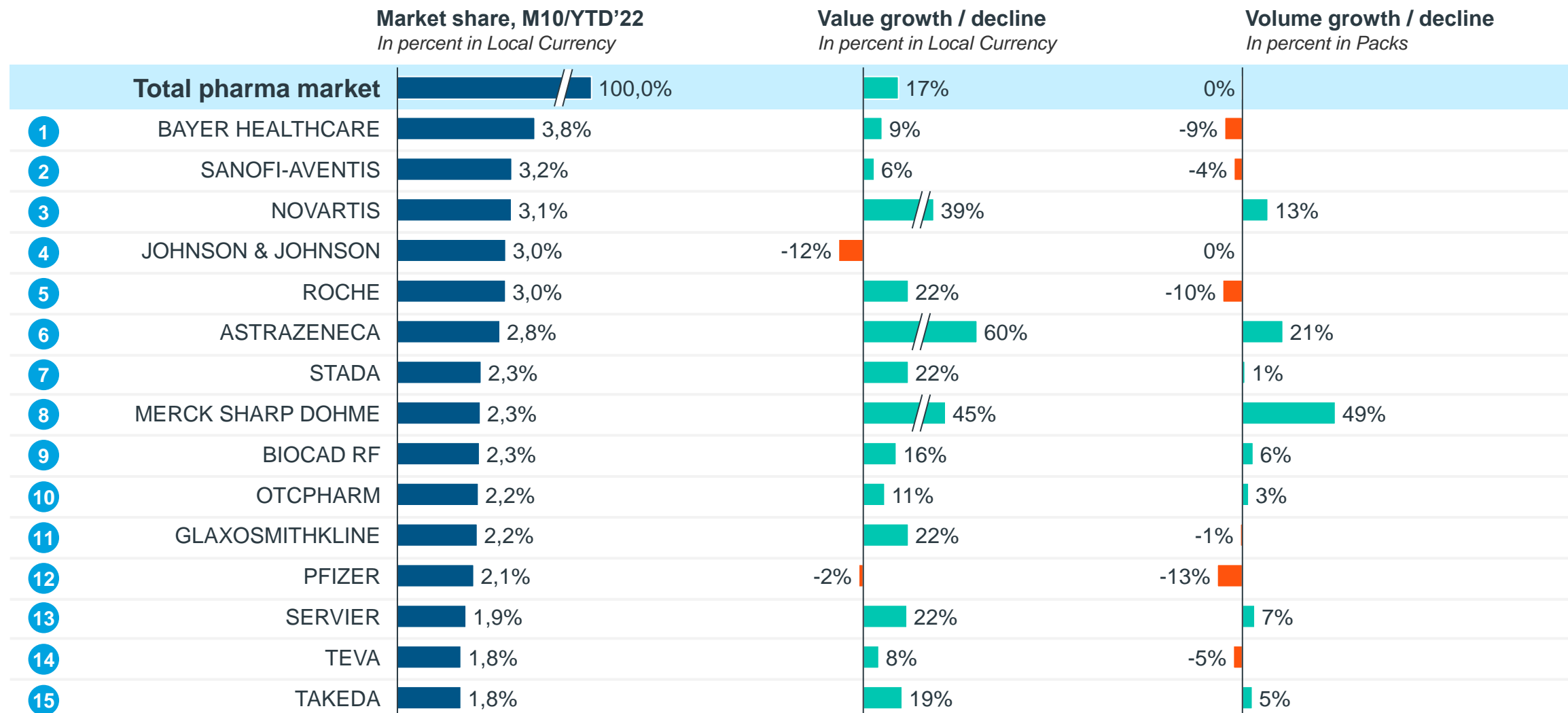
Retail Sell-Out: Market grew by 14% in value and 1,3% in volume



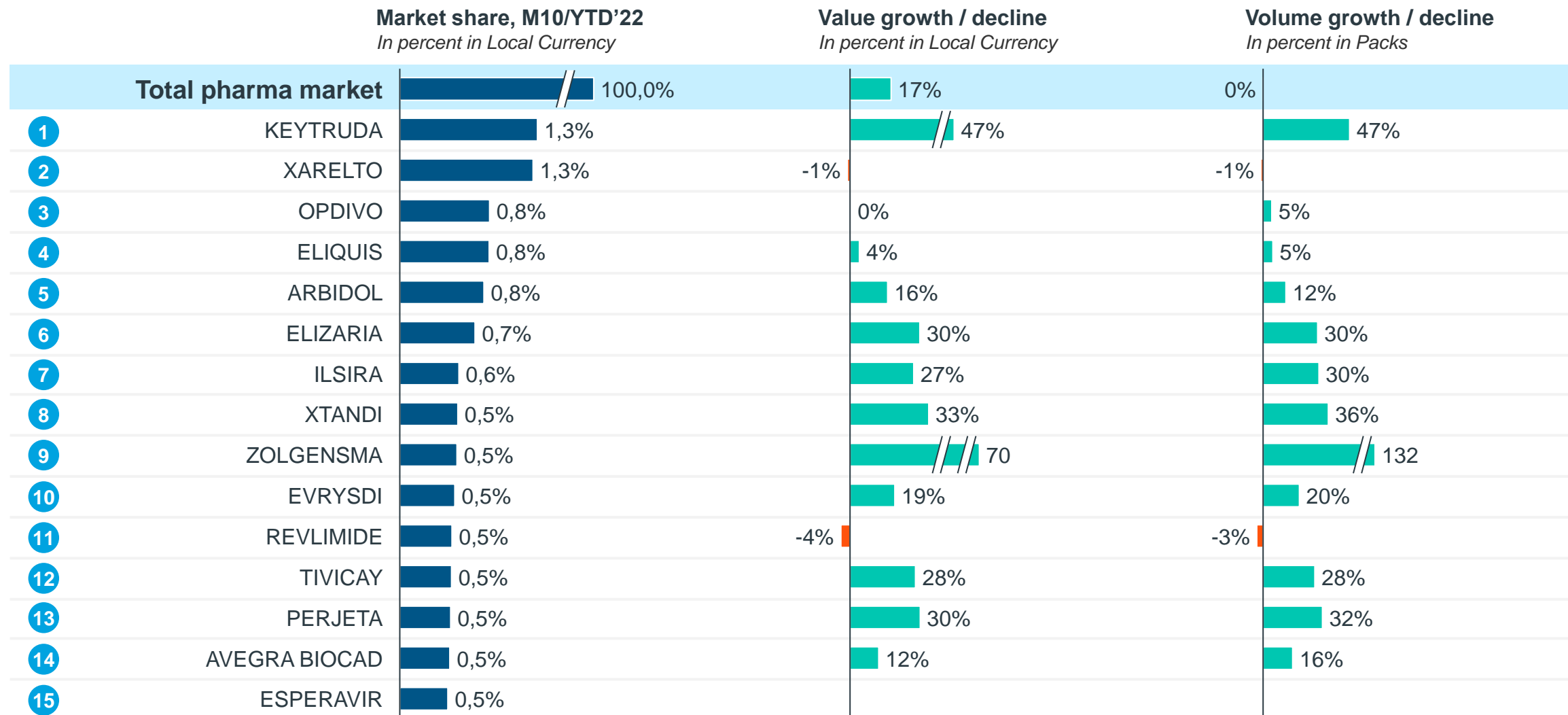
Sell-In vs Sell-Out, OTC registered drugs



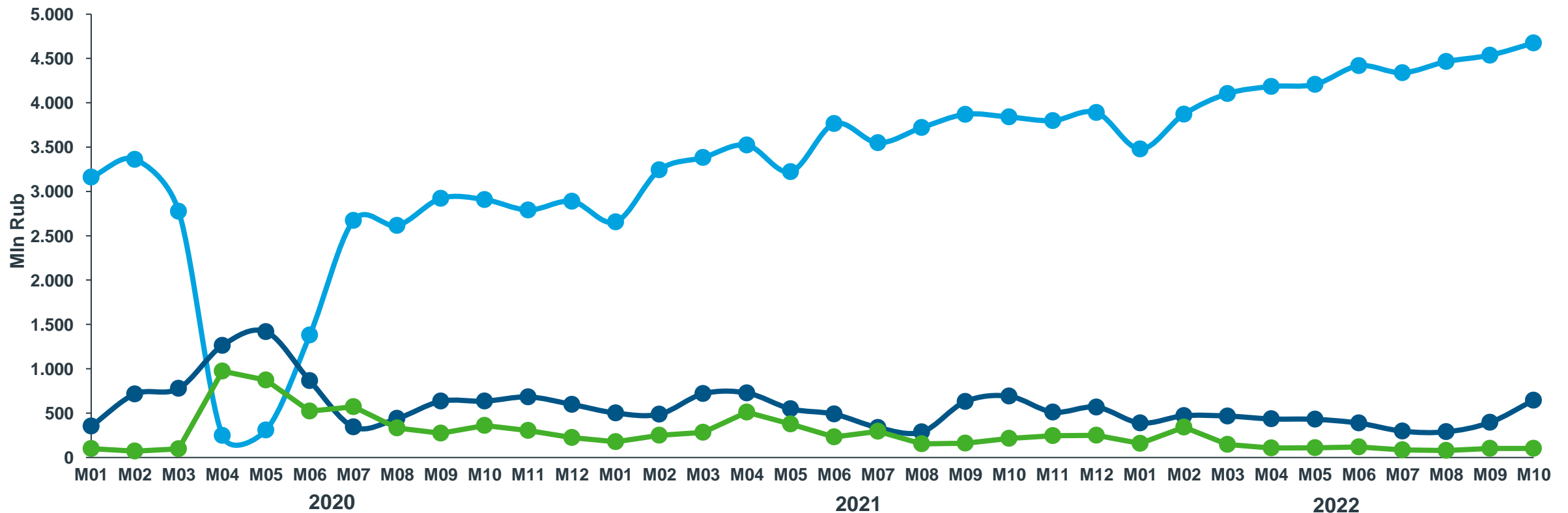
TOP-15 corporations on Russian market, October 2022



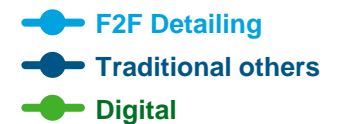
TOP-15 brands on Russian market, October 2022



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

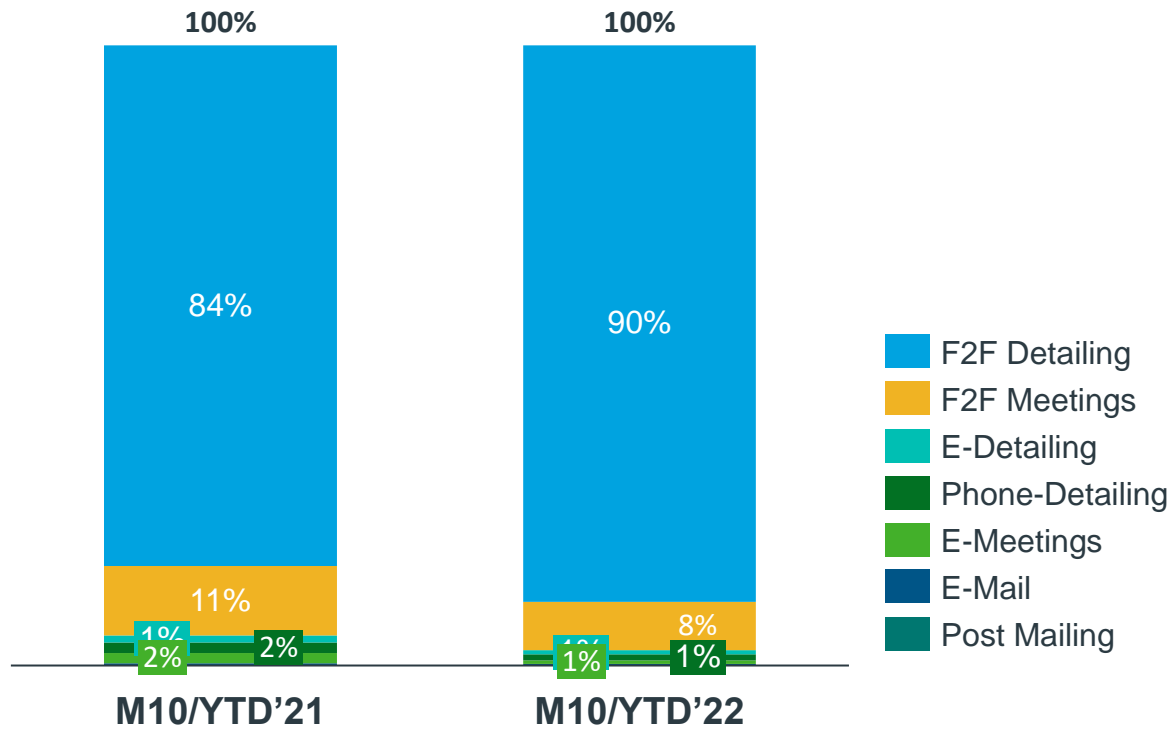


Value – a cost of each interaction projected on doctor’s universe

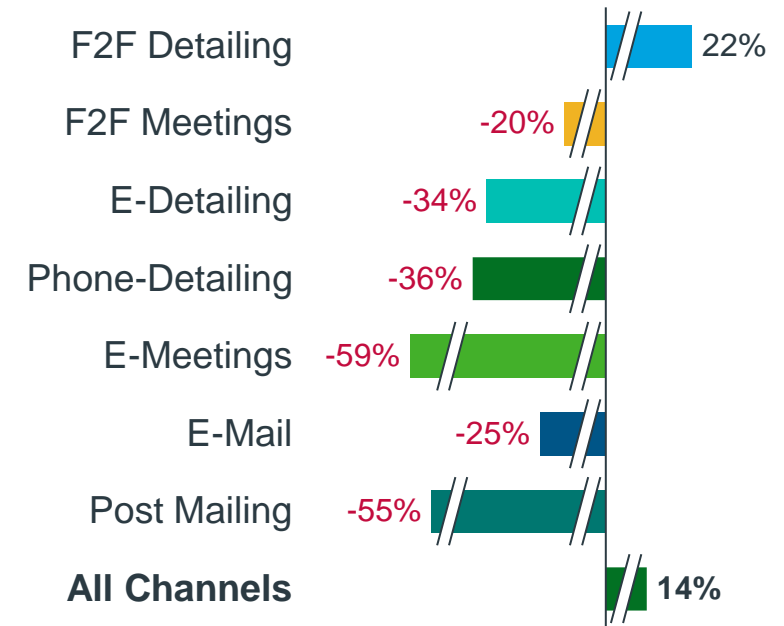


Total Market overall promotional value in Rub increased by 14%, YTD October 2022 vs 2021

Promotional value in Rub share by channel



% Changes in promotional value in Rub by channel YTD October 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

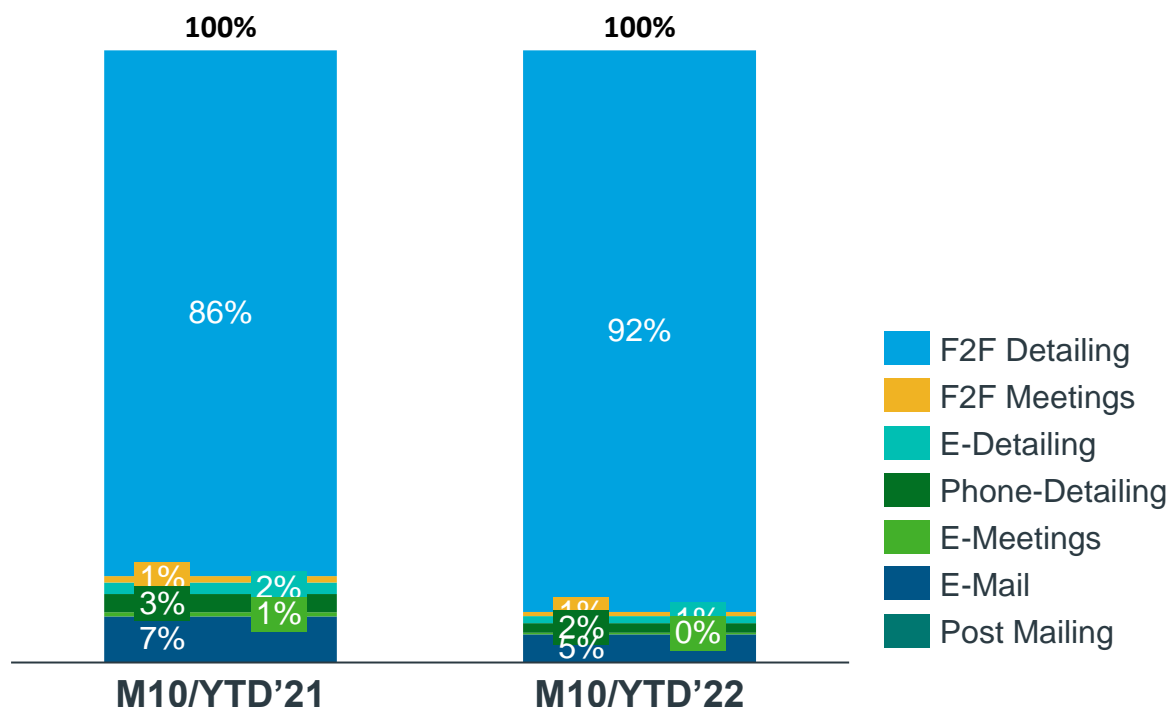
Value – a cost of each interaction projected on doctor’s universe

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.

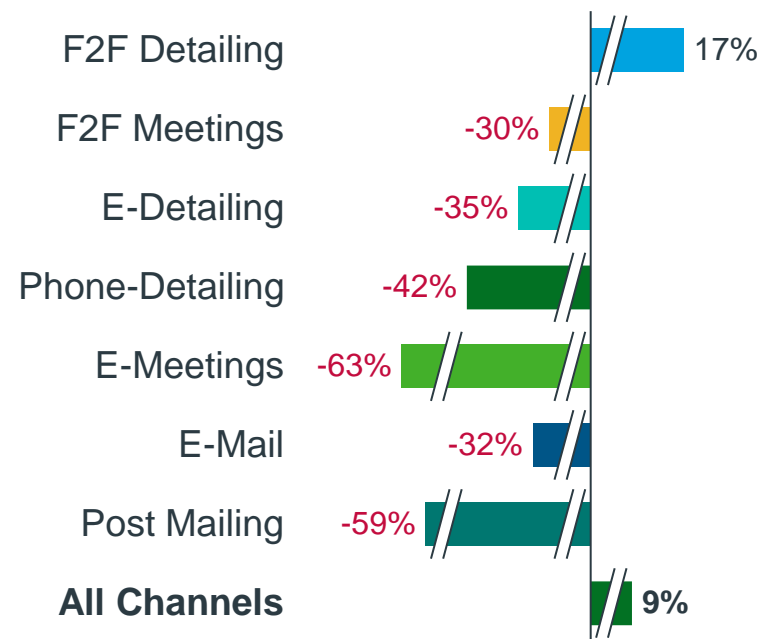
Total Market overall promotional volume (contacts) increased by 9%, YTD October 2022 vs 2021



Promotional value in Rub share by channel



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

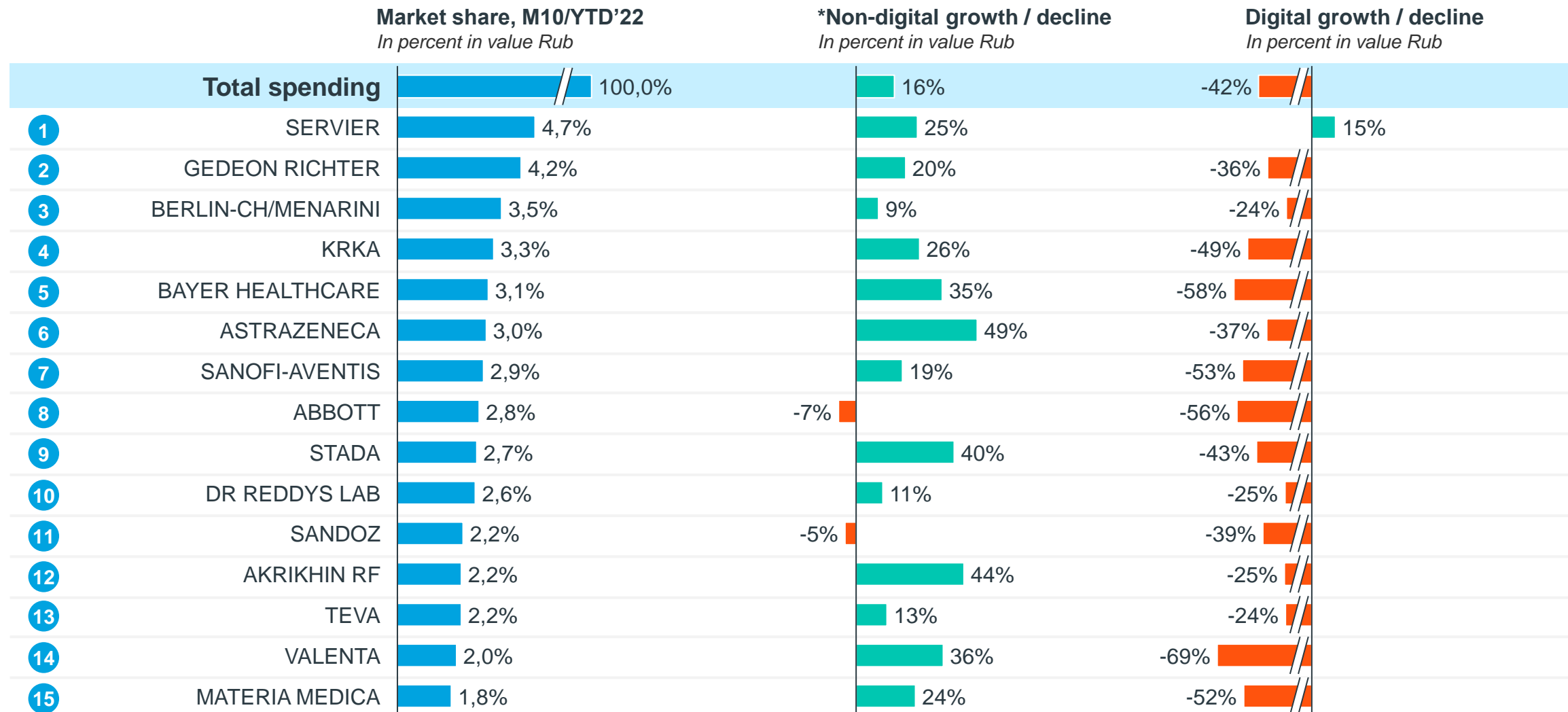


F2F Detailing – Reps visits. **Traditional others:** 1) F2F meetings – group meetings, round tables etc, 2) Phone Detailing – phone calls, 3) E-mail – communication via email. 4) Post Mailing – paper mails. **Digital:** 1) E-detailing – 1-1 calls visits using digitabl platforms 2) E-meetings – group 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 October 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 October 2022

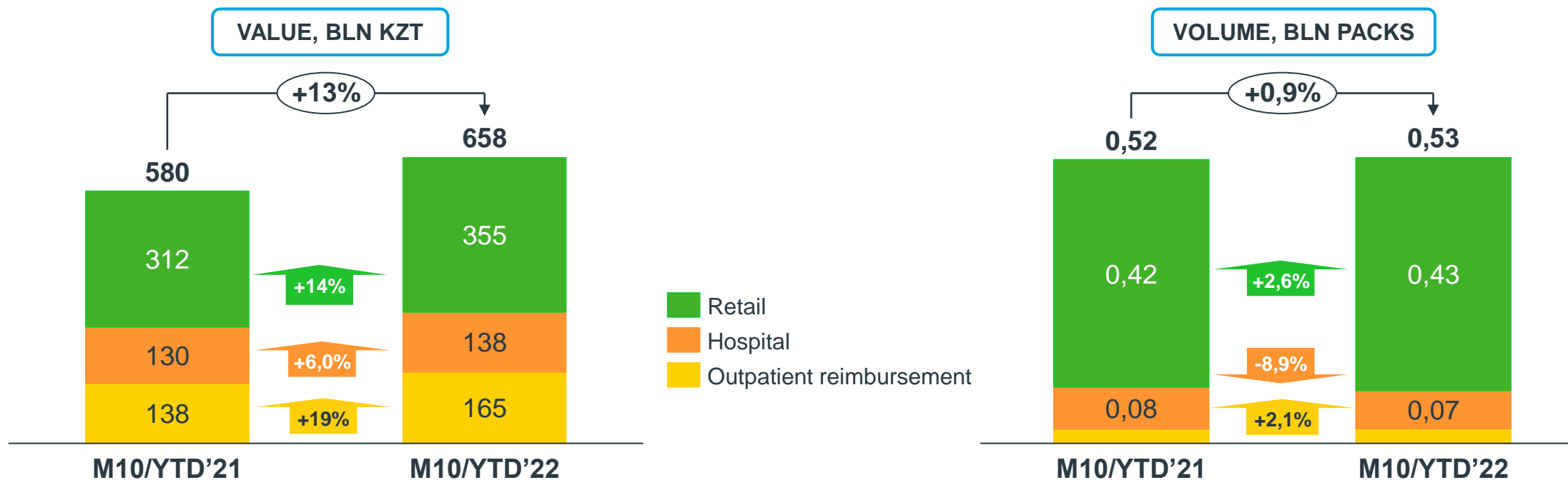
Market grew by 13% in value and 0,9% in volume



18,8%



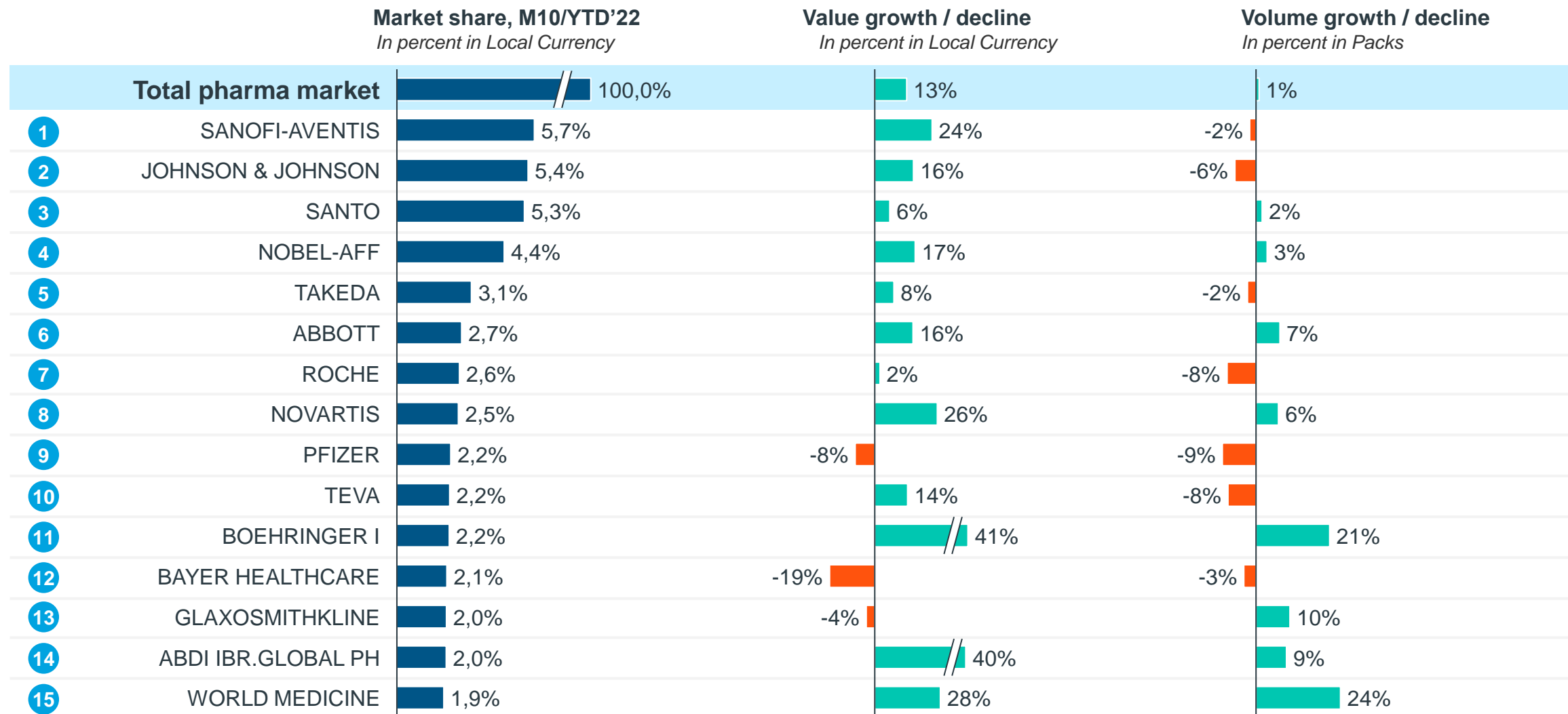
INFLATION



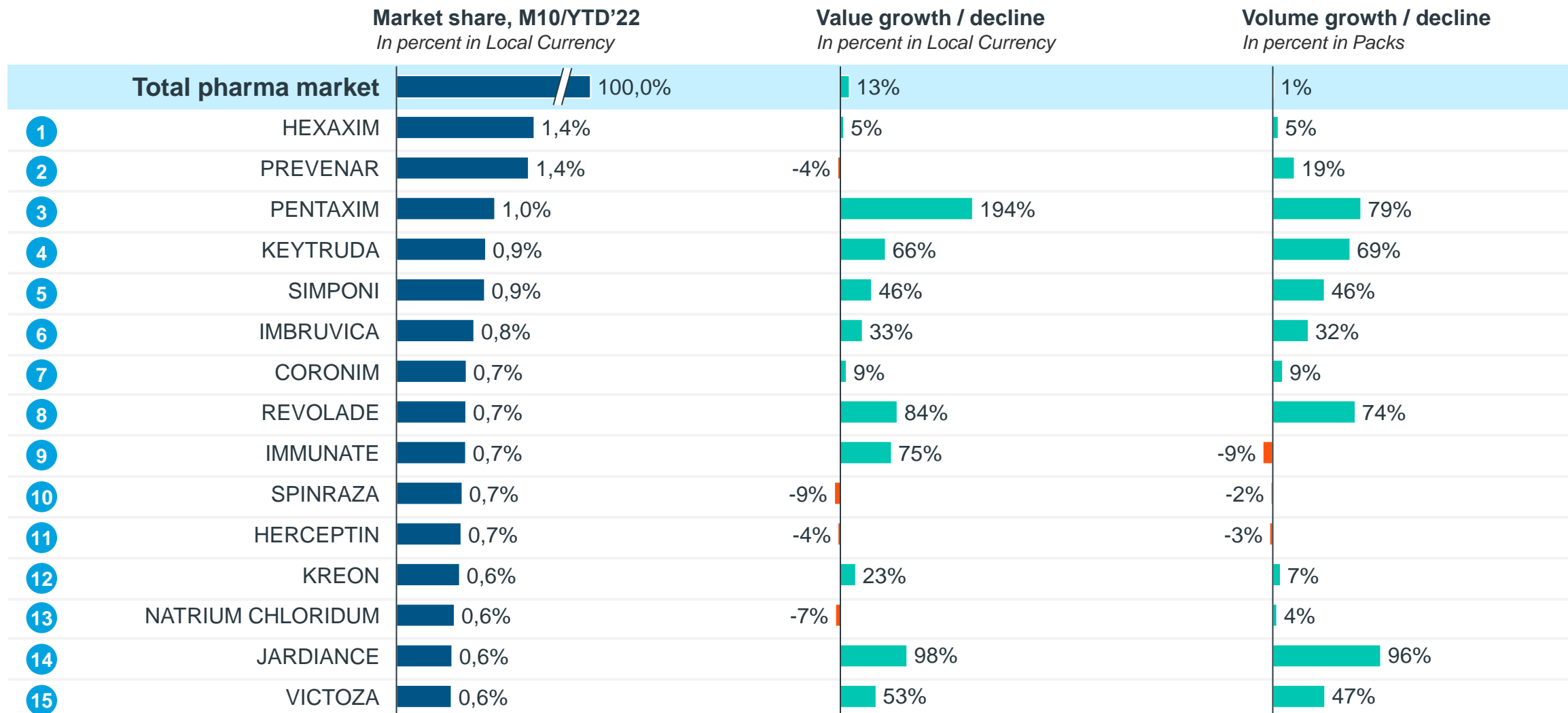
Indicator	KZT	USD	EUR	PACKS
Value M10/YTD'22, Bln.	658	1,43	1,36	0,53
Growth M10/YTD'22, %	▲ 13%	▲ 4,4%	▲ 18%	▲ 0,9%

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, October 2022



TOP-15 brands on Kazakhstan market, October 2022



Belarus pharma market dynamics in October 2022

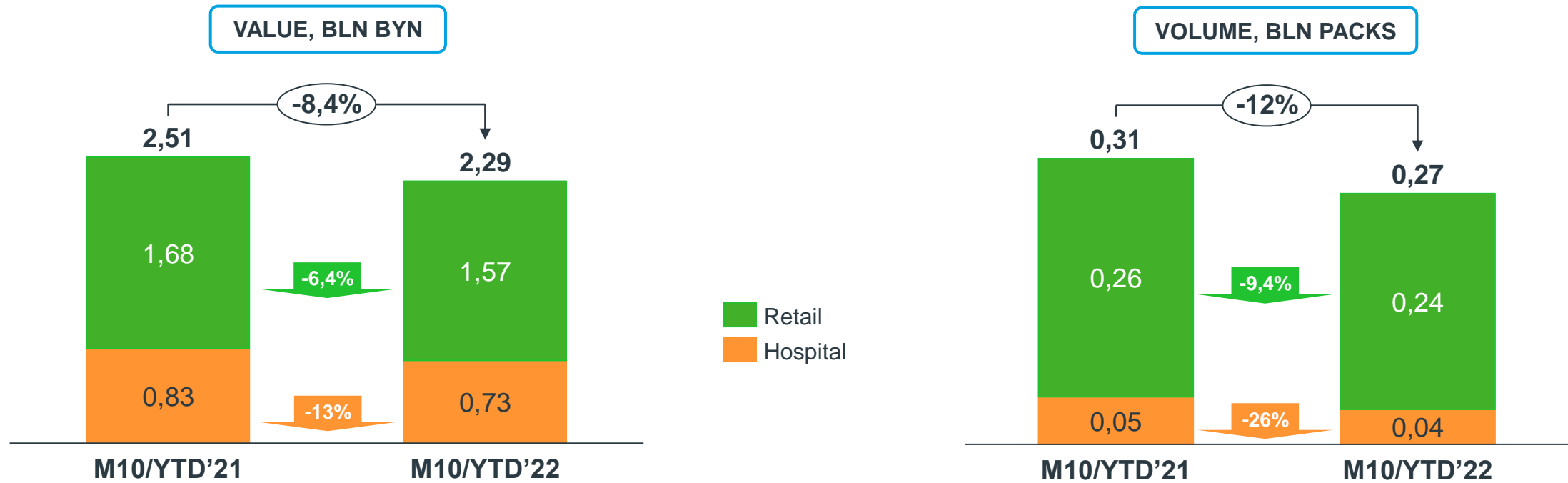
Market dropped by 8,4% in value and by 12% in volume



15,2%



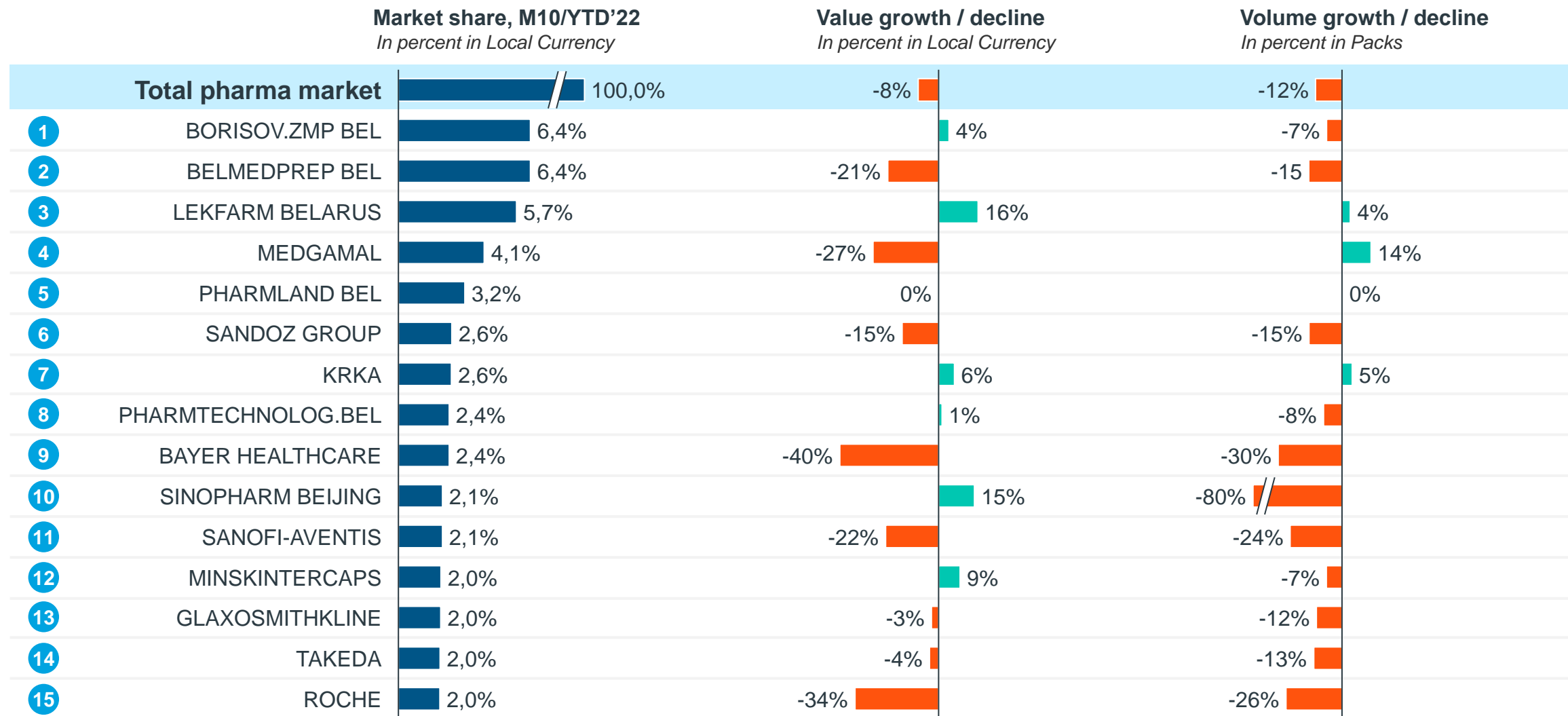
INFLATION



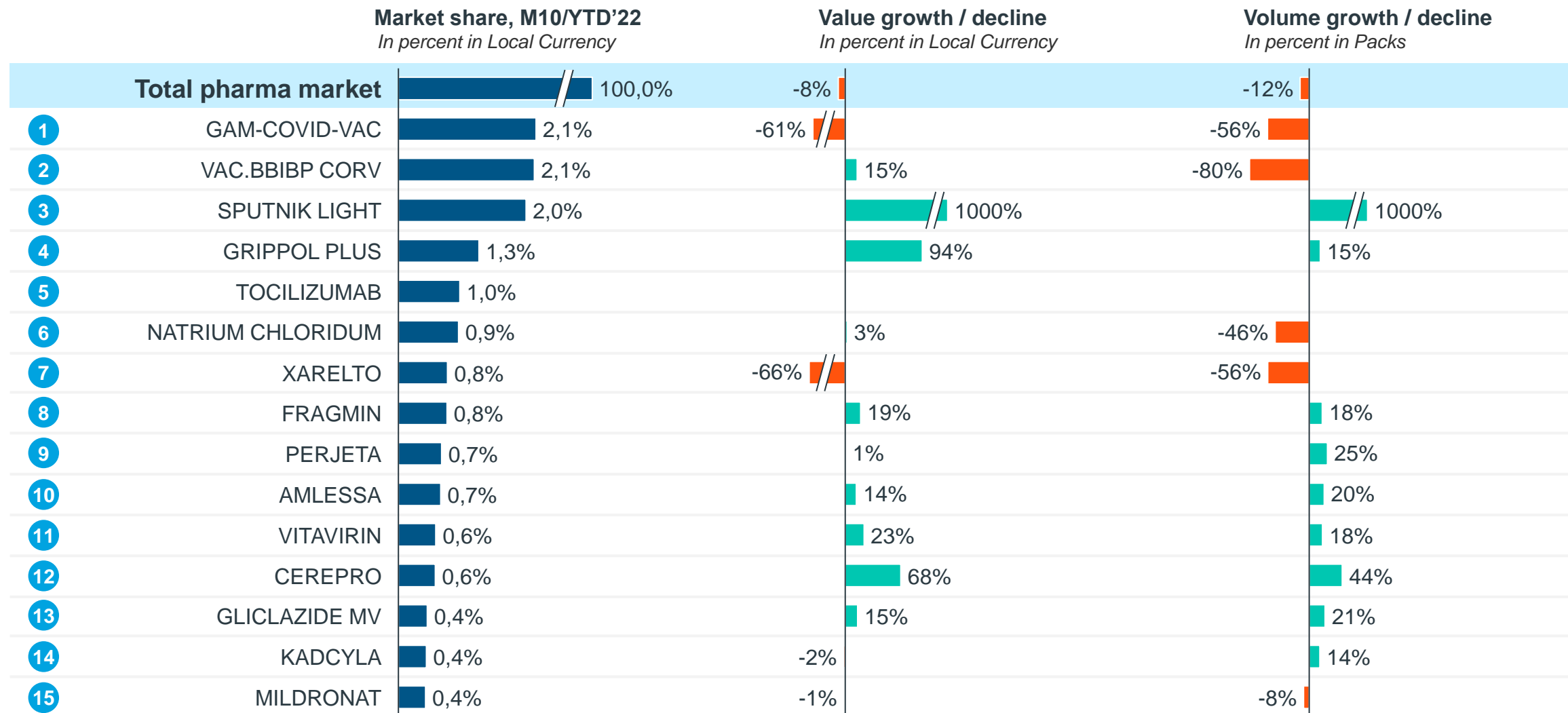
Indicator	BYN	USD	EUR	PACKS
Value M10/YTD'22, Bln.	2,29	0,87	0,83	0,27
Growth M10/YTD'22, %	▼ -8,4%	▼ -12%	▼ -0,4%	▼ -12%

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, October 2022



TOP-15 brands on Belarus market, October 2022



Uzbekistan pharma market dynamics in October 2022

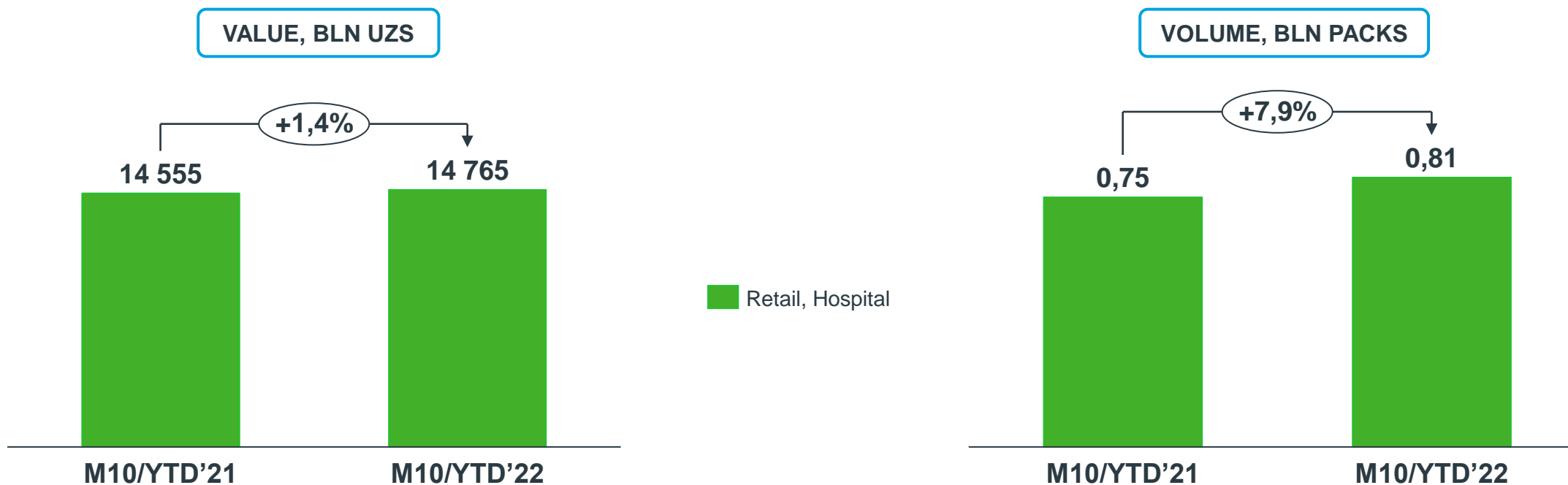
Market grew by 1,4% in value and 7,9% in volume



12,2%

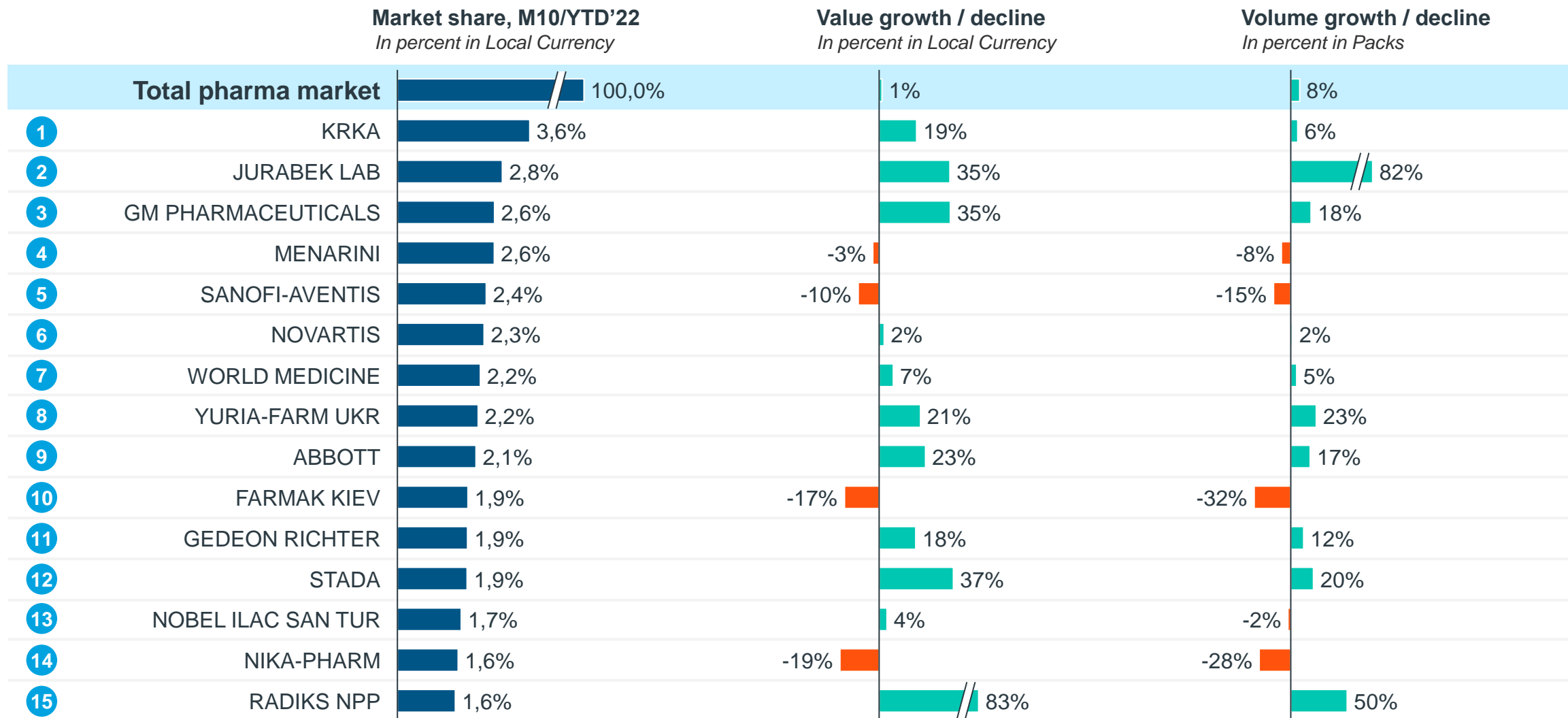


INFLATION



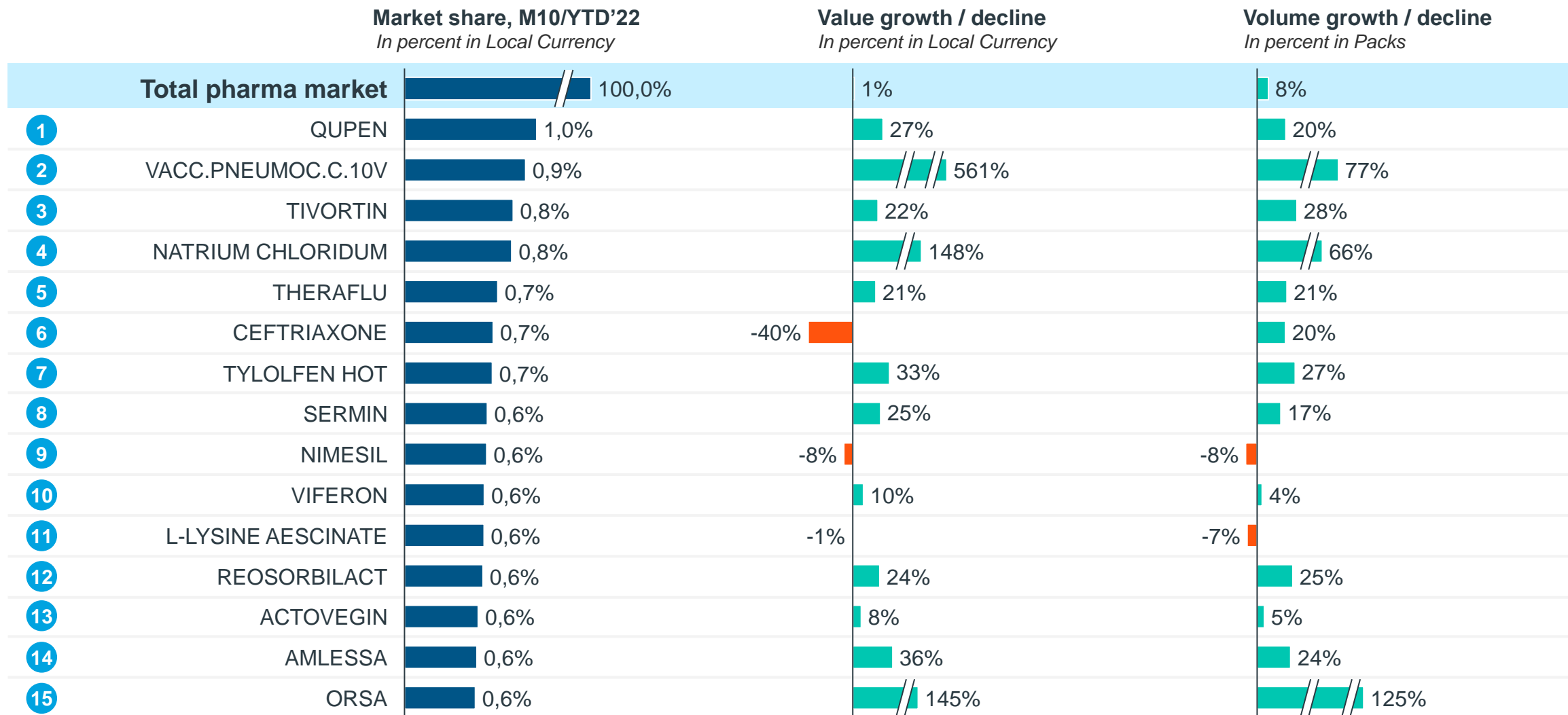
Indicator	UZS	USD	EUR	PACKS
Value M10/YTD'22, Bln.	14 765	1,34	1,27	0,81
Growth M10/YTD'22, %	▲ 1,4%	▼ -2,4%	▲ 10%	▲ 7,9%

TOP-15 corporations on Uzbekistan market, October 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, October 2022

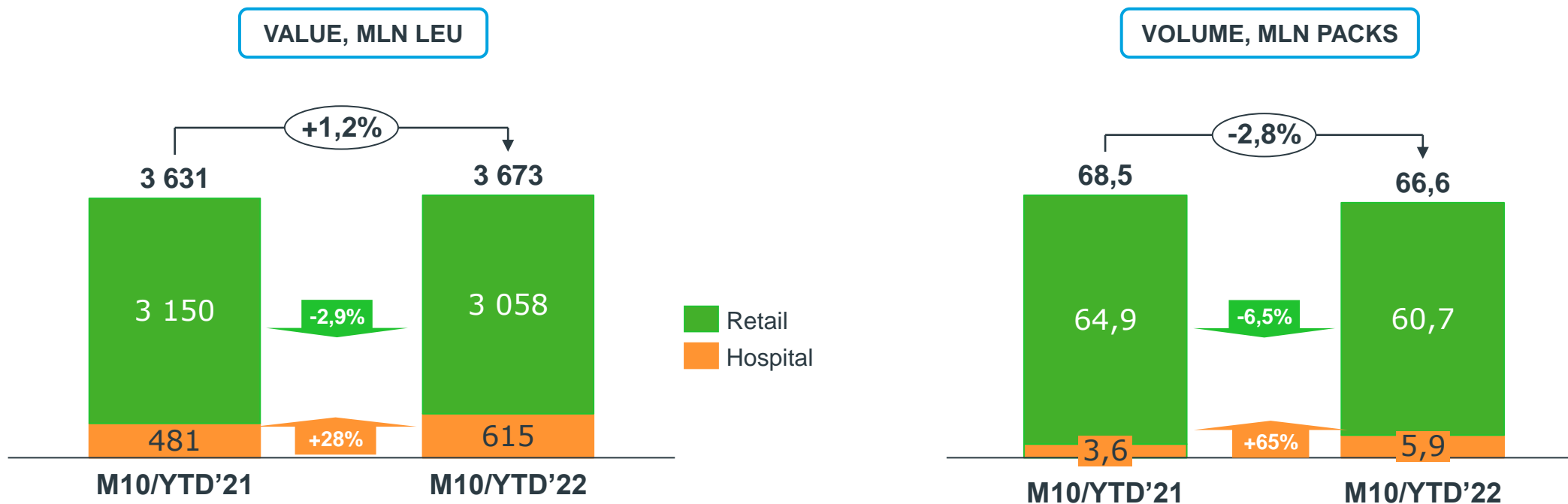


Moldova pharma market dynamics in October 2022

Market grew by 1,2% in value and dropped by 2,8% in volume

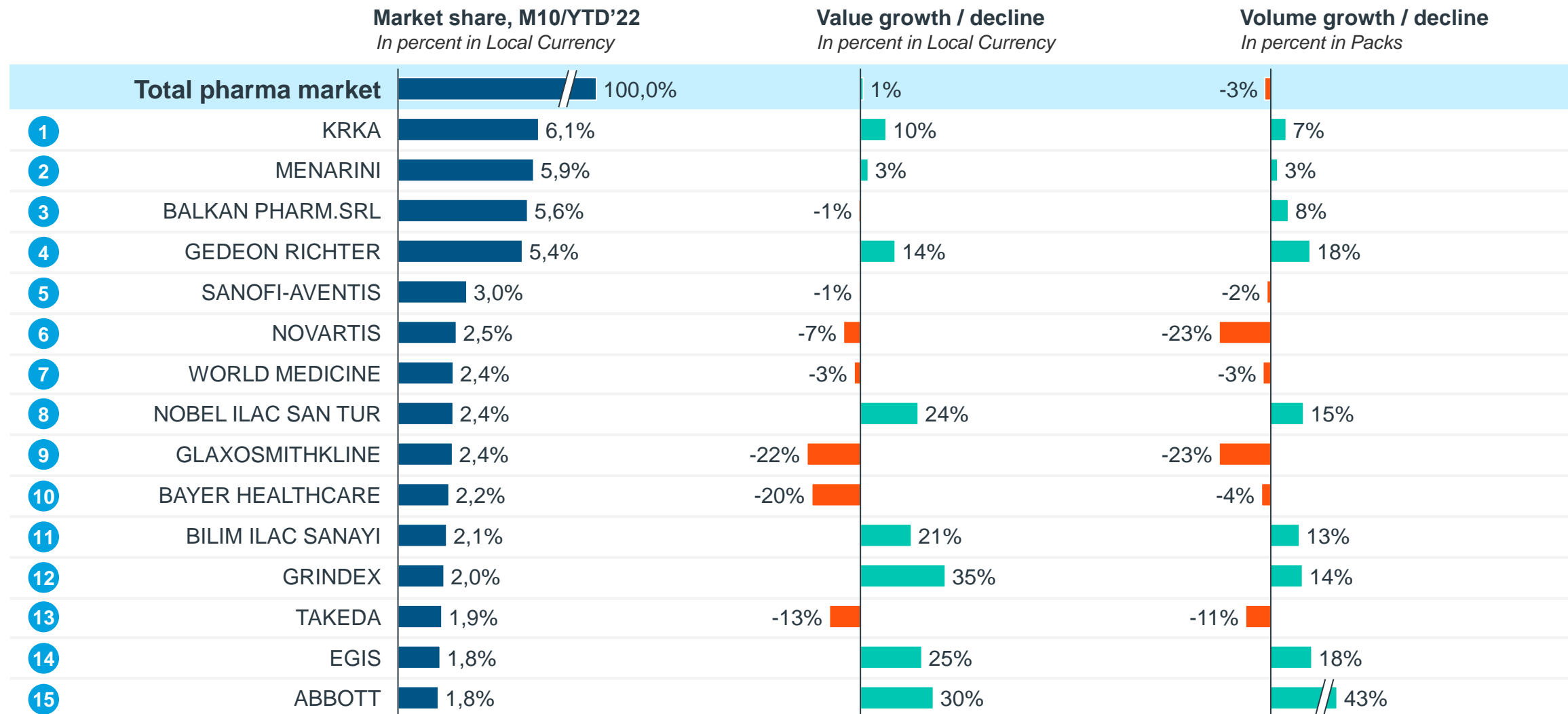


34,6%
INFLATION

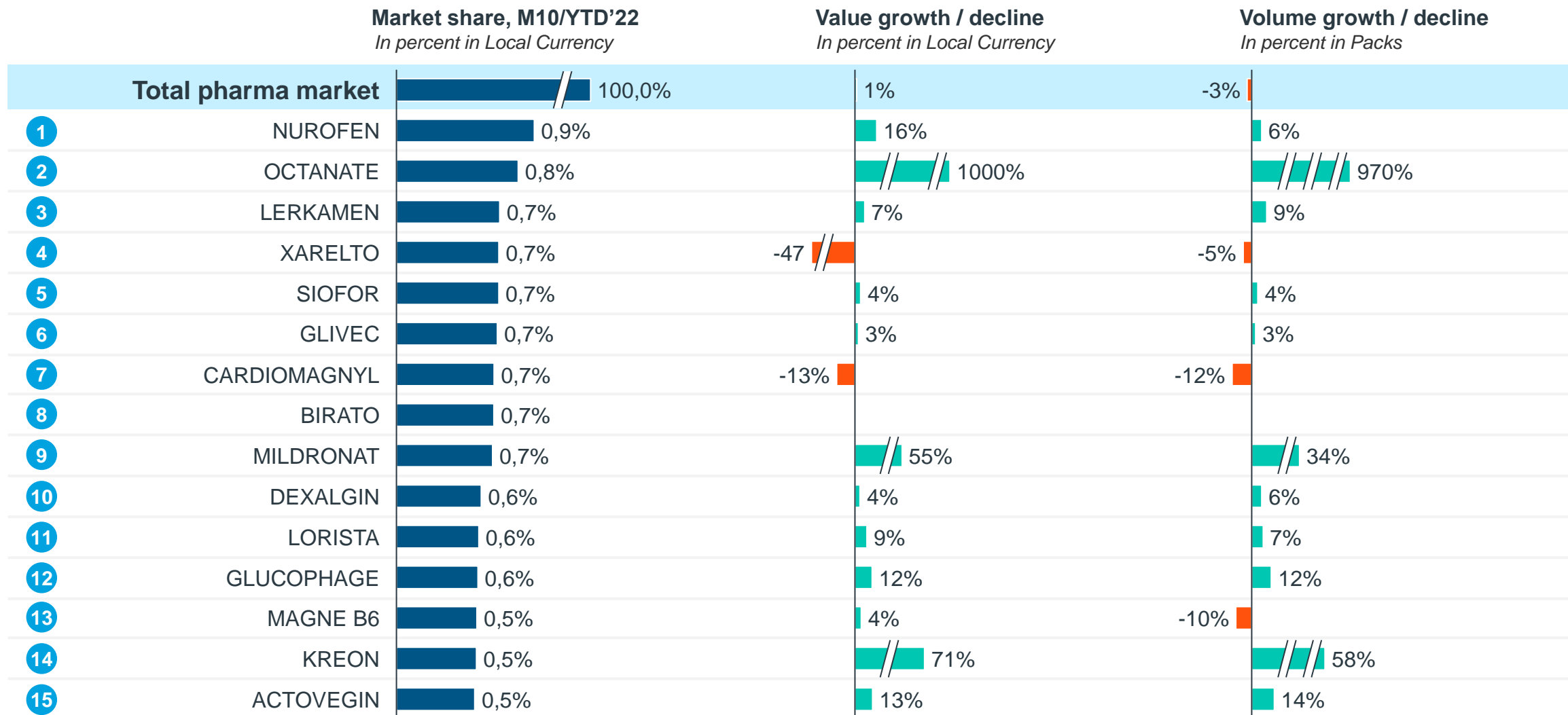


Indicator	LEU	USD	EUR	PACKS
Value M10/YTD'22, Mln.	3 673	195,5	184,9	66,6
Growth M10/YTD'22, %	▲ 1,2%	▼ -4,8%	▲ 7,3%	▼ -2,8%

TOP-15 corporations on Moldova market, October 2022



TOP-15 brands on Moldova market, October 2022



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