

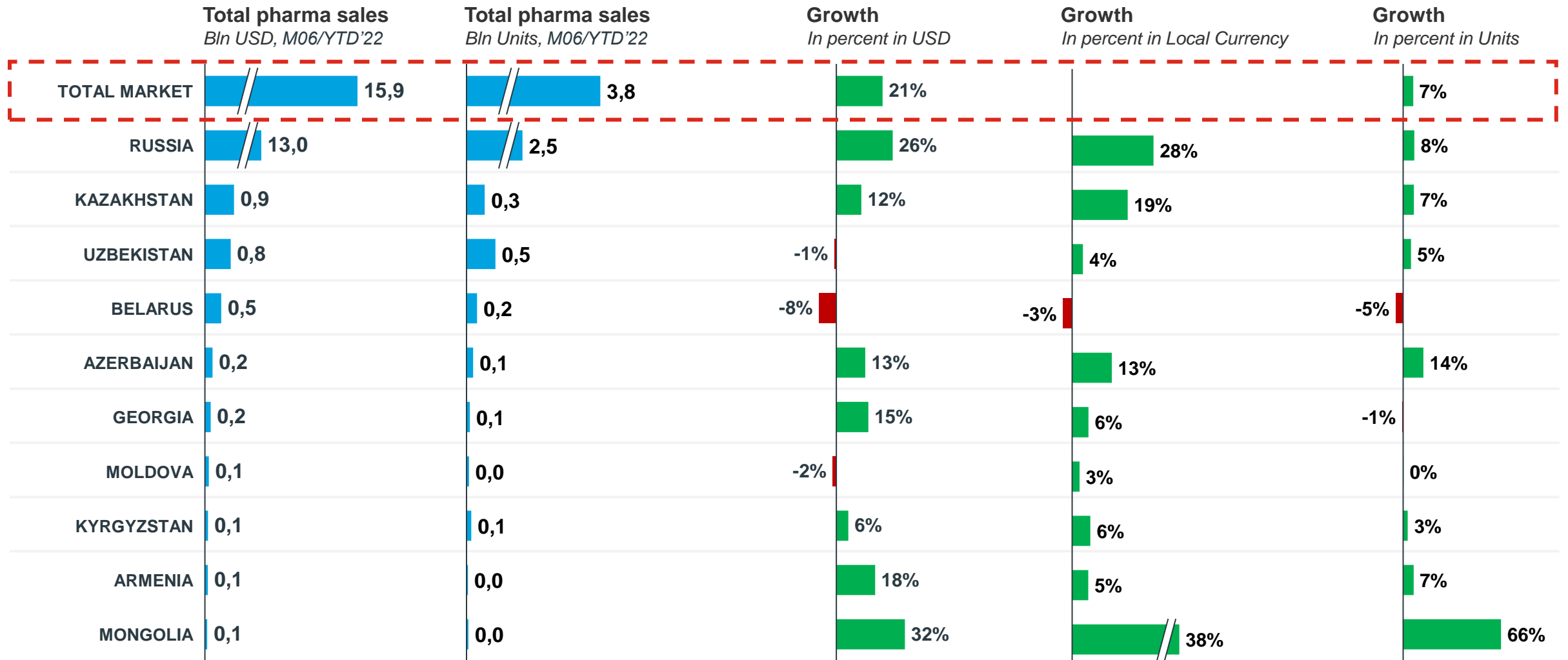


Facts from IQVIA

M06 2022

EAEU & CIS, Russia Countries ranking in June 2022, Total market, Value in Bln. USD and Units

Total Market grew by 21% in USD and by 7% in Units



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

Russian pharma market growth in June 2022

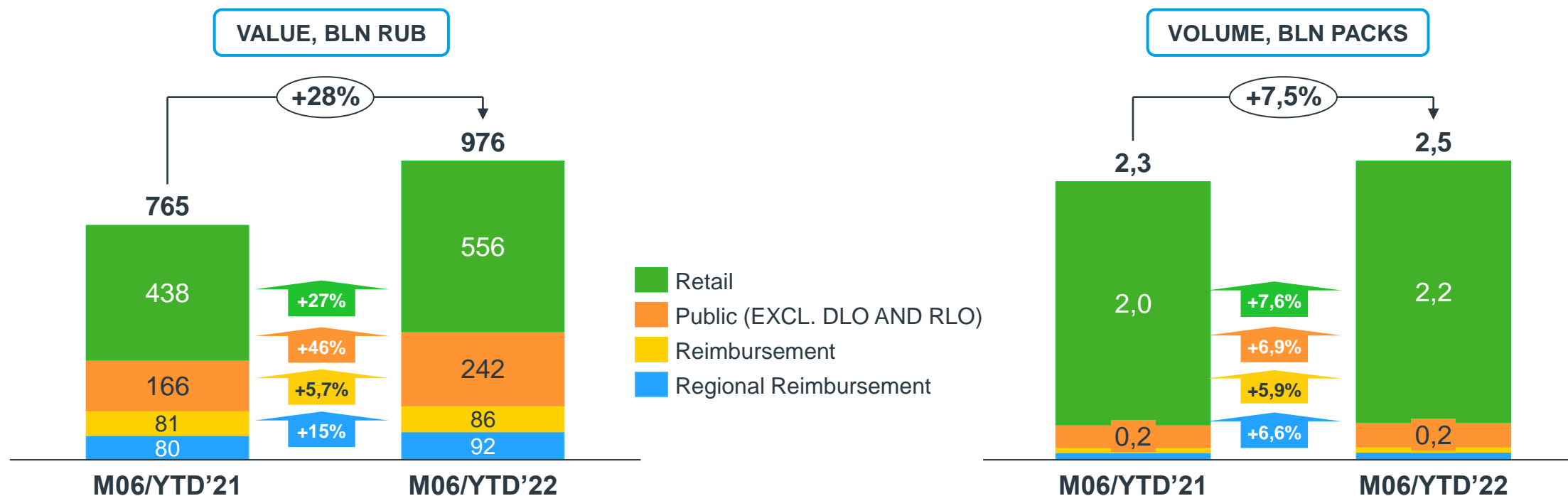
Market grew by 28% in value and 8% in volume



15,9%



INFLATION



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

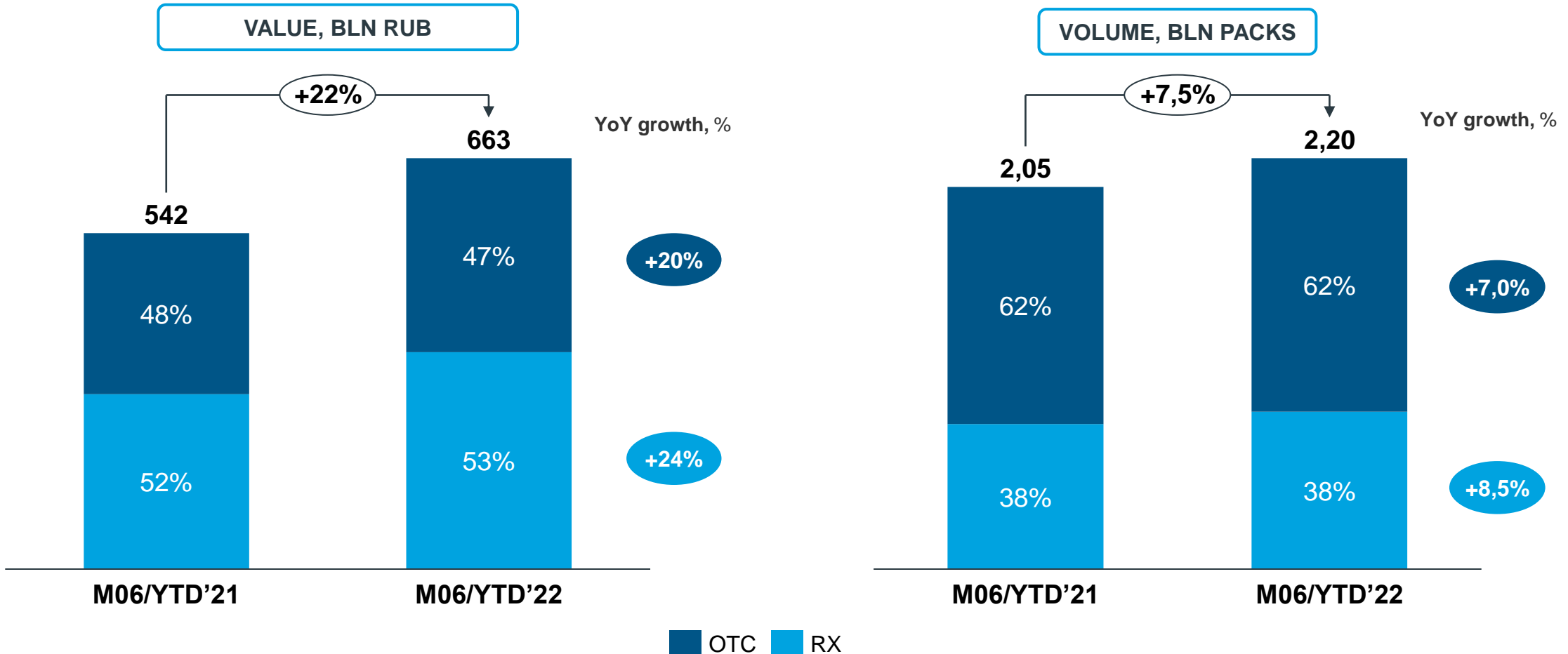
Indicator	RUB	USD	EUR	PACKS
Value M06/YTD'22, Bln.	976	13,0	11,9	2,5
Growth M06/YTD'22, %	▲ 28%	▲ 26%	▲ 40%	▲ 7,5%

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

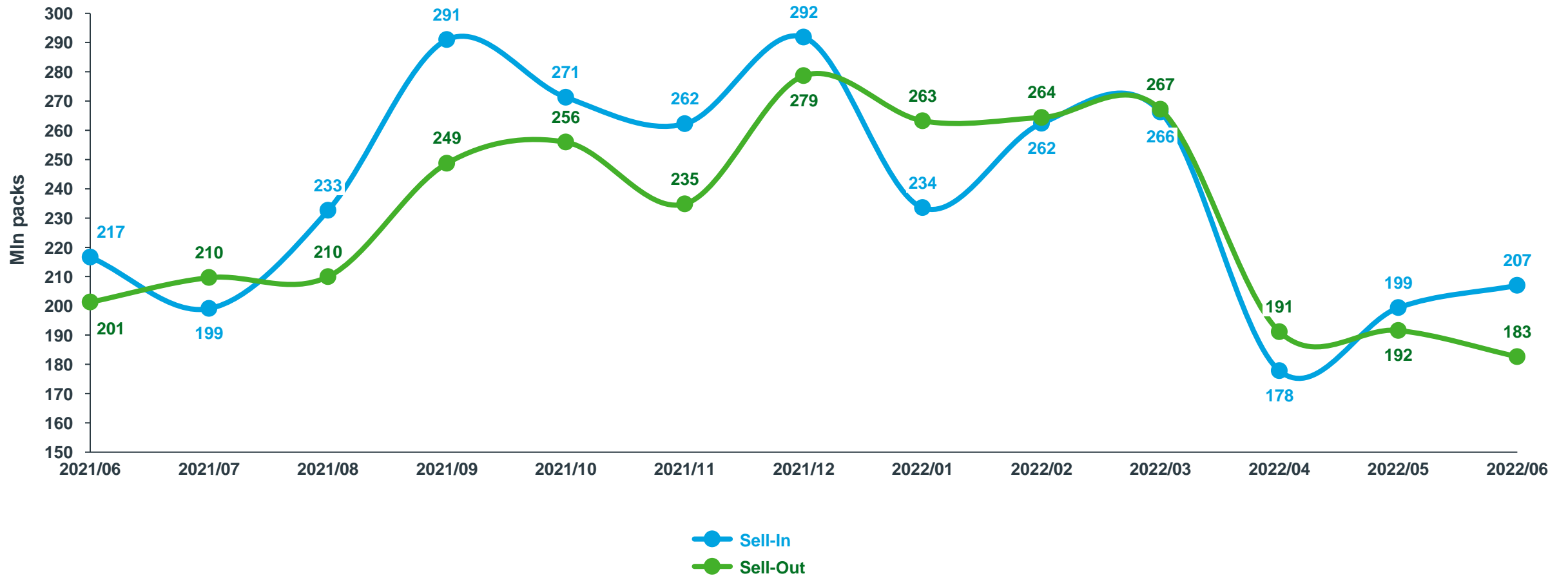
Russian pharma market growth in June 2022



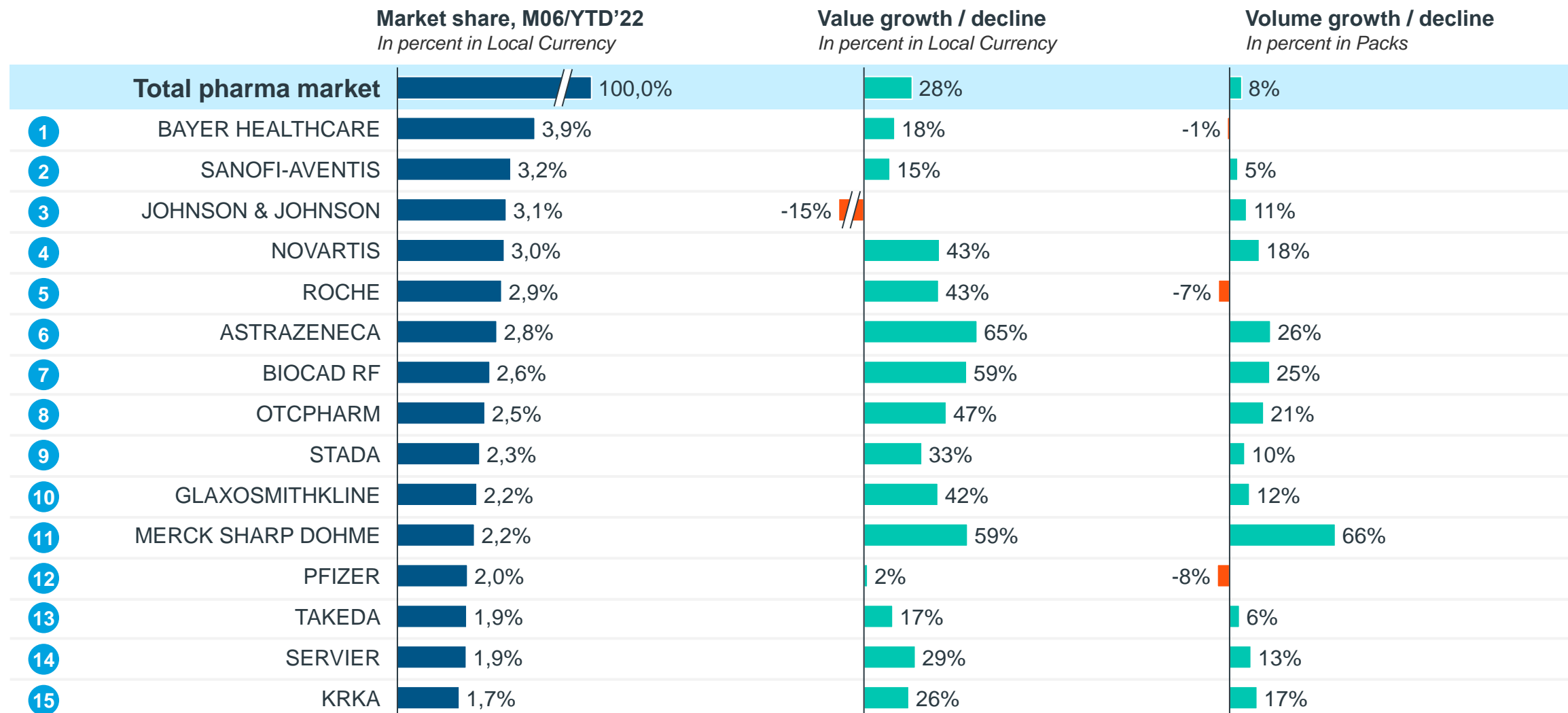
Retail Sell-Out: Market grew by 22% in value and 8% in volume



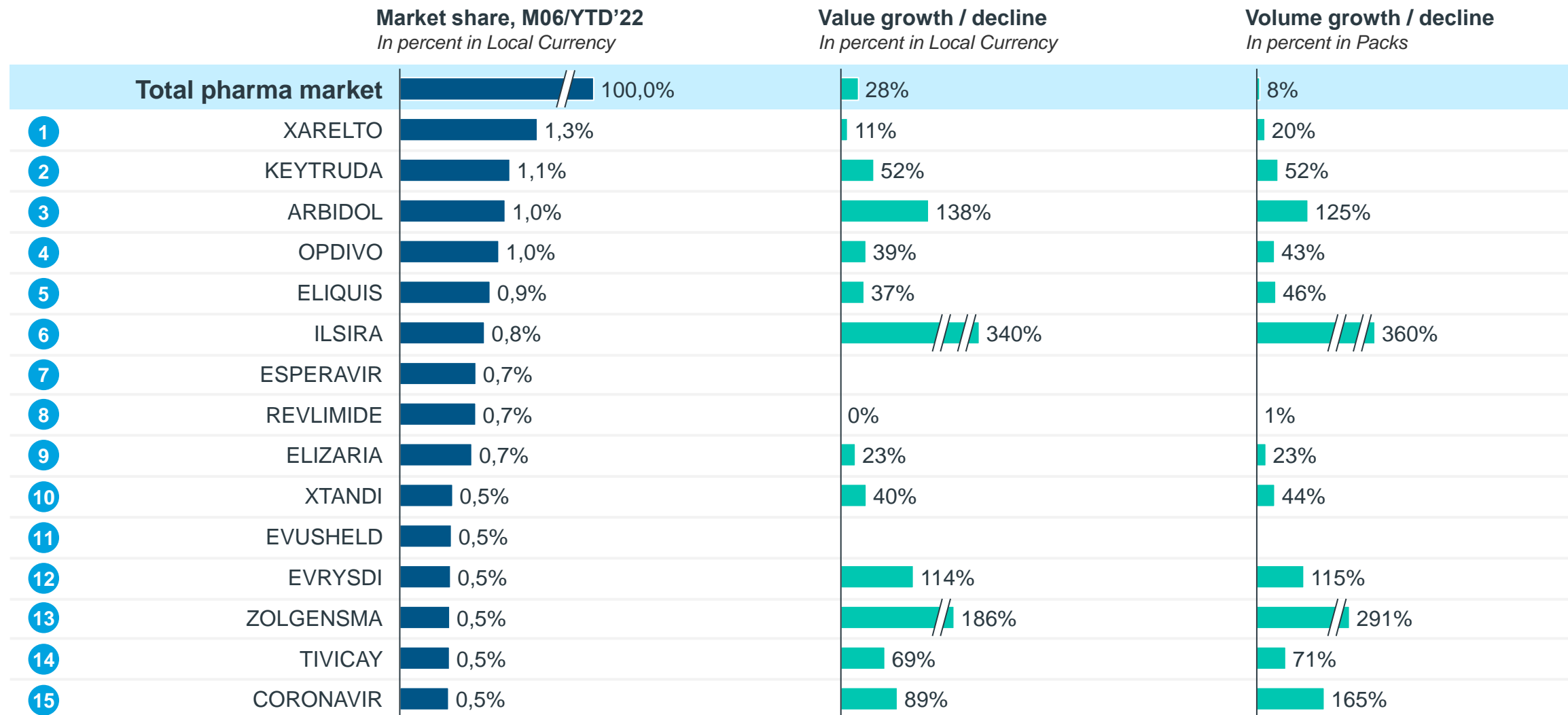
Sell-In vs Sell-Out, OTC registered drugs



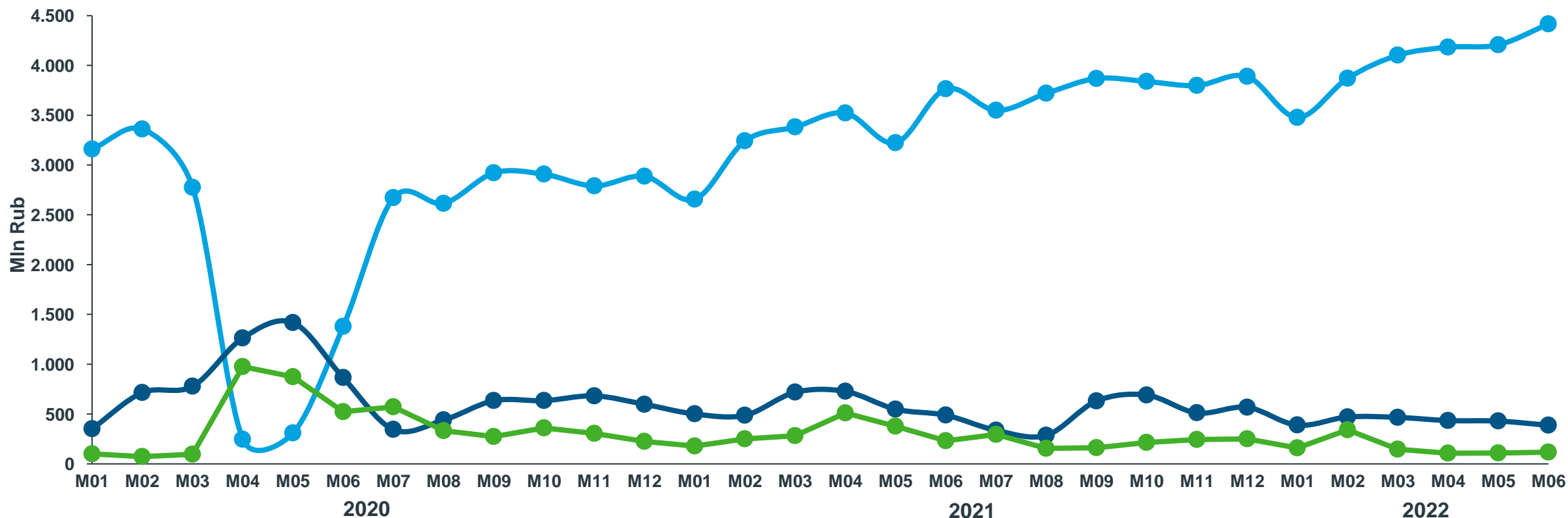
TOP-15 corporations on Russian market, June 2022



TOP-15 brands on Russian market, June 2022



Promotional interactions in value Rub by channel in Russia, January 2020 – June 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 digital platforms 2) E-meetings – group e-meetings, webinars etc

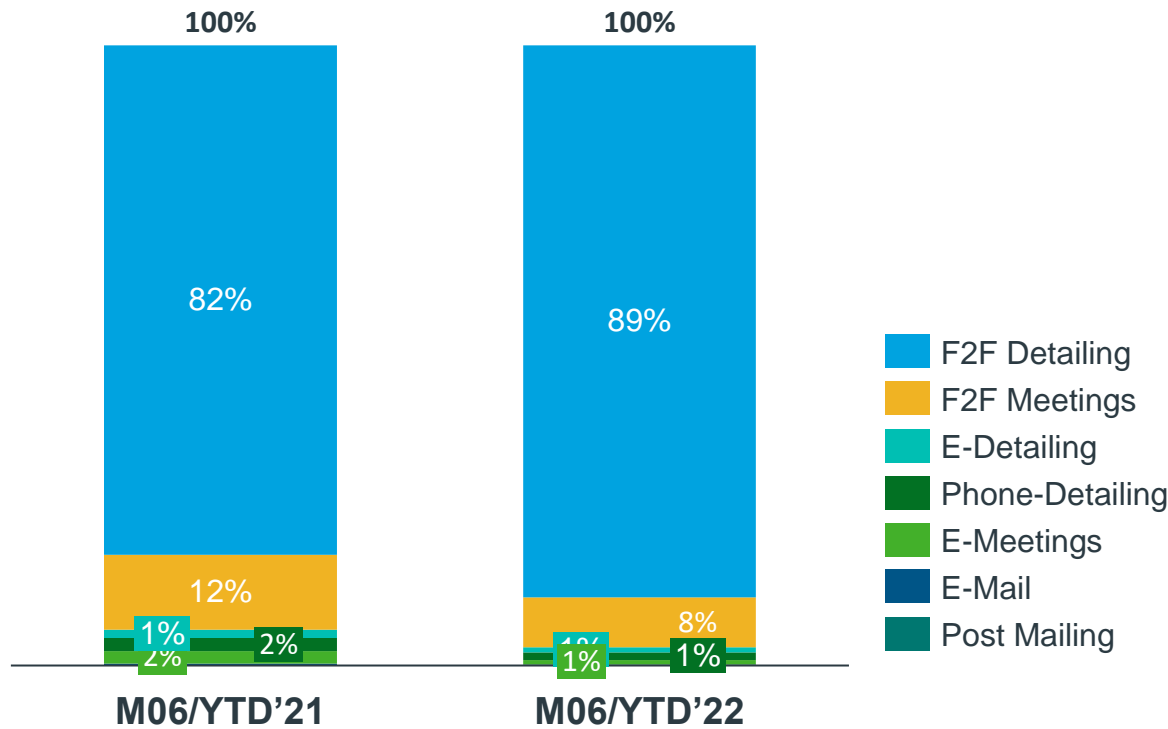


Value – a cost of each interaction projected on doctor's universe

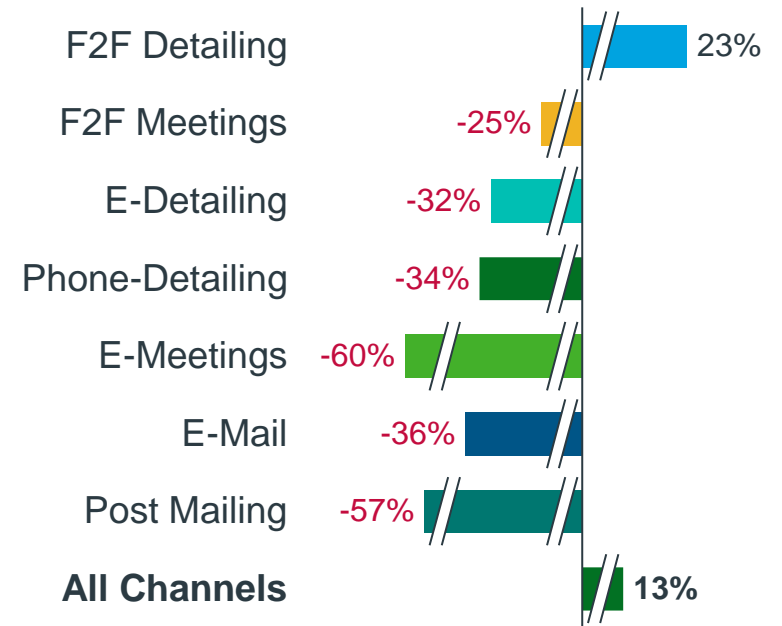


Total Market overall promotional value in Rub increased by 13%, YTD June 2022 vs 2021

Promotional value in Rub share by channel



% Changes in promotional value in Rub by channel YTD June 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

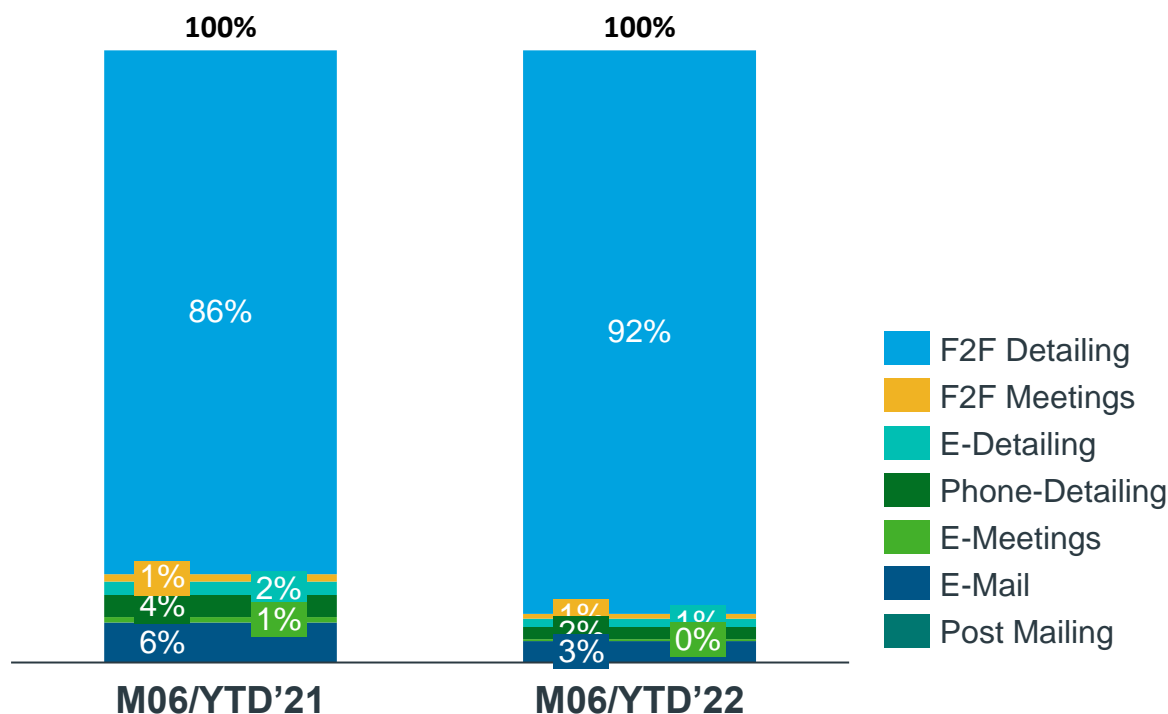
Value – a cost of each interaction projected on doctor’s universe

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.

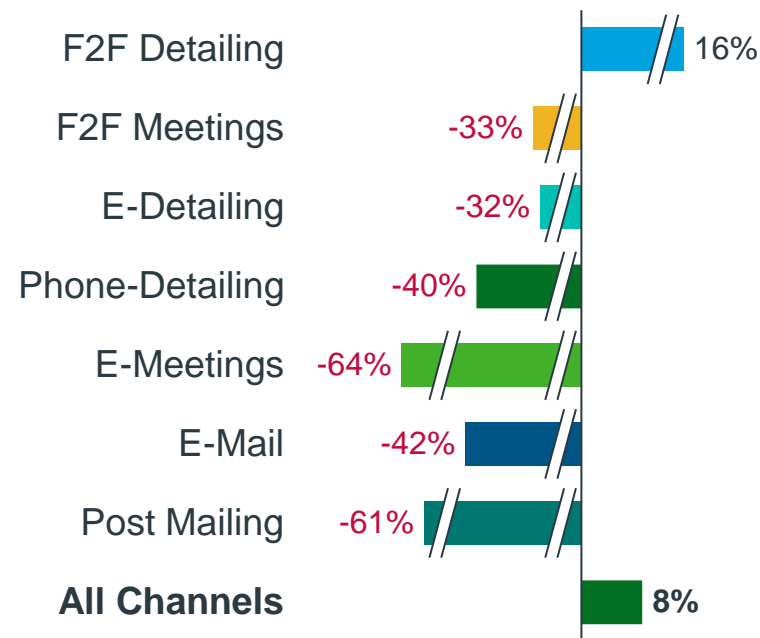
Total Market overall promotional volume (contacts) increased by 8%, YTD June 2022 vs 2021



Promotional value in Rub share by channel



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

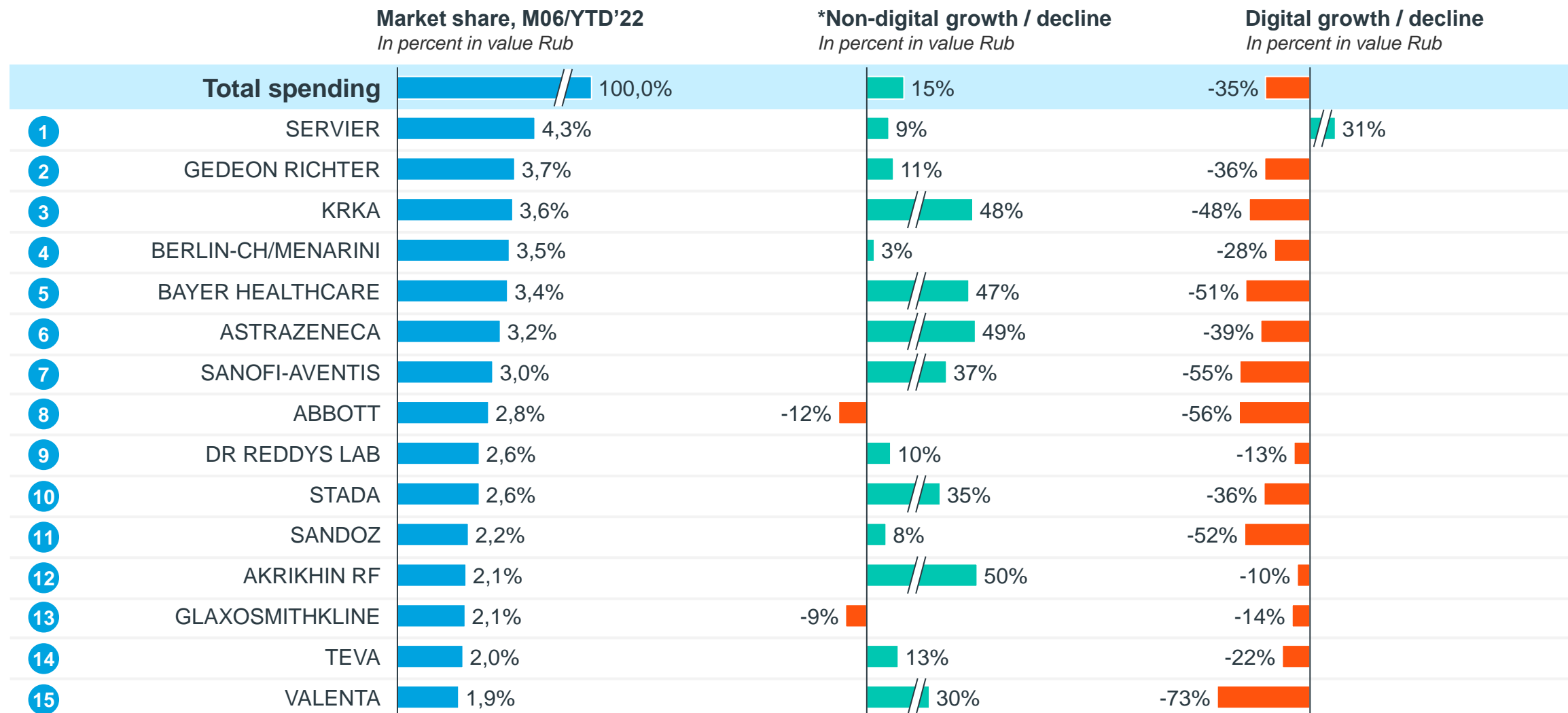


F2F Detailing – Reps visits. **Traditional others:** 1) F2F meetings – group meetings, round tables etc, 2) Phone Detailing – phone calls, 3) E-mail – communication via email. 4) Post Mailing – paper mails. **Digital:** 1) E-detailing – 1-1 calls visits using digitabl platforms 2) E-meetings – group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



*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.

Kazakhstan pharma market growth in June 2022

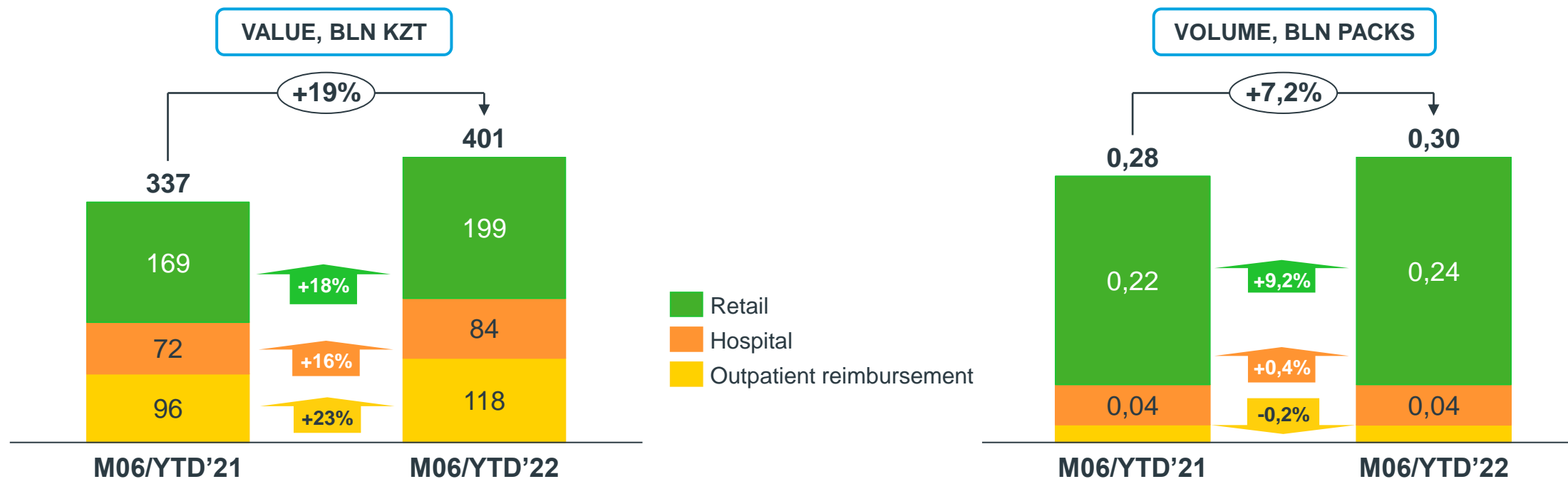
Market grew by 19% in value and 7% in volume



14,5%



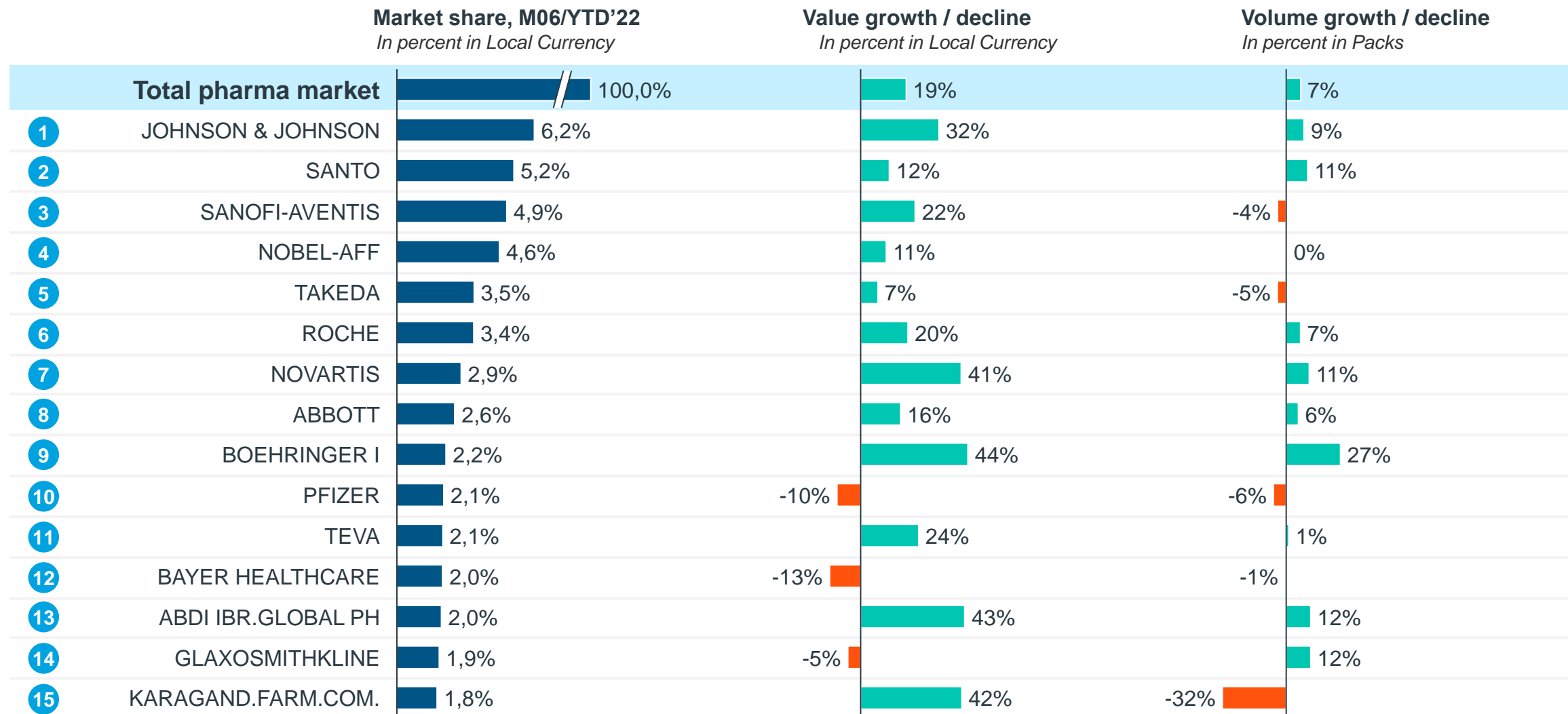
INFLATION



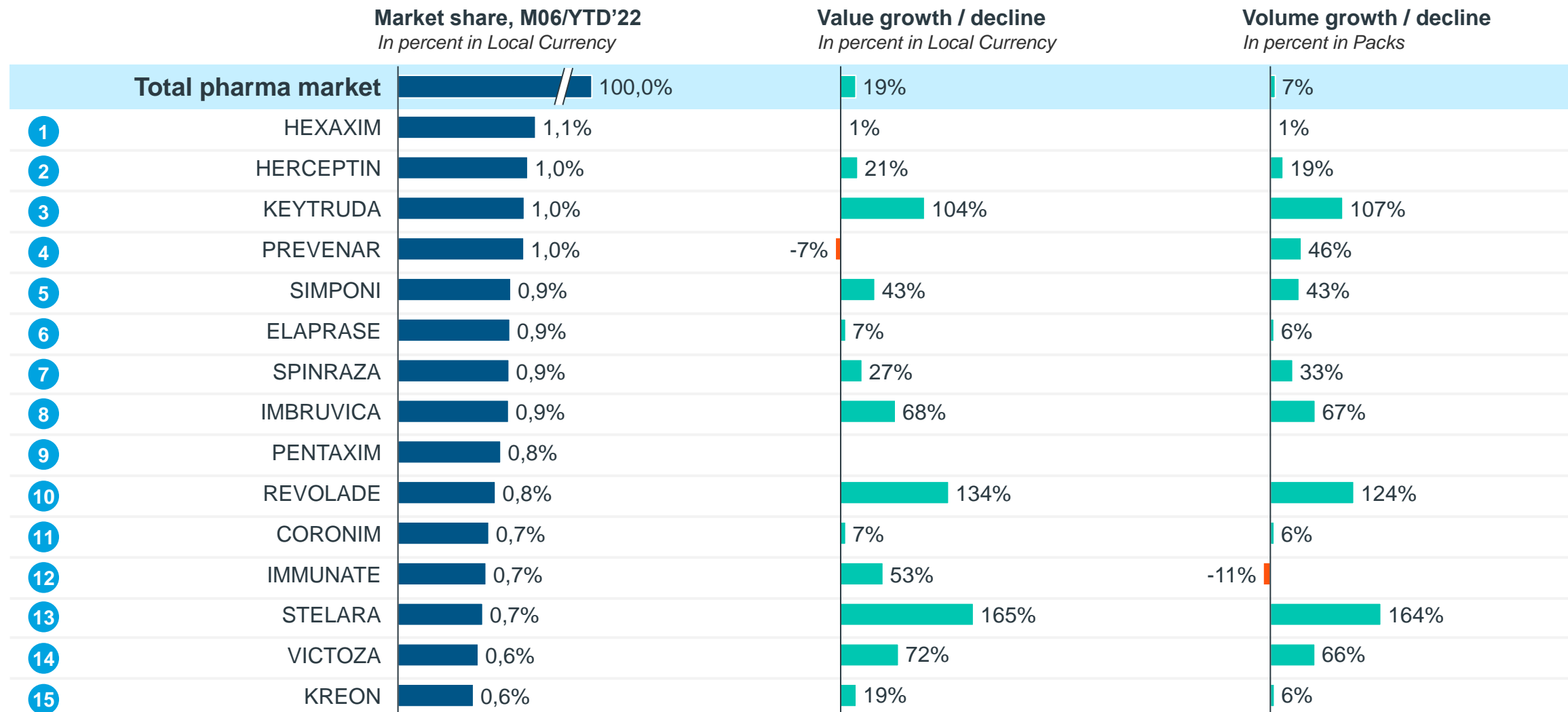
Indicator	KZT	USD	EUR	PACKS
Value M06/YTD'22, Bln.	401	0,89	0,81	0,30
Growth M06/YTD'22, %	▲ 19%	▲ 12%	▲ 23%	▲ 7,2%

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, June 2022



TOP-15 brands on Kazakhstan market, June 2022



Belarus pharma market decrease in June 2022

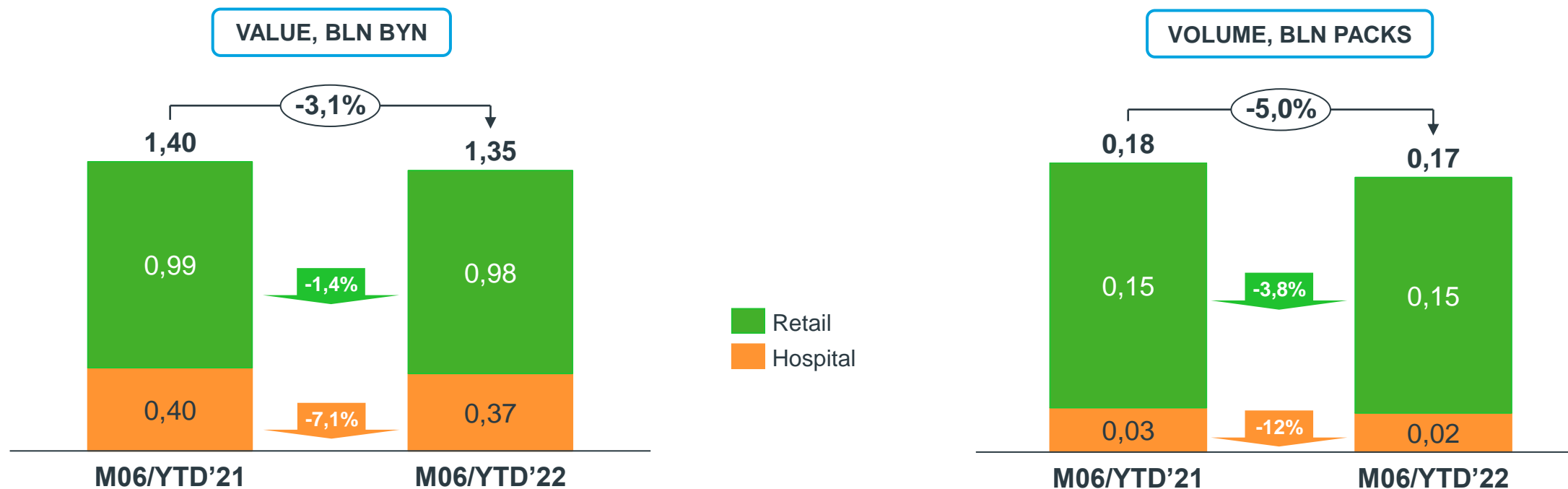
Market dropped by -3% in value and by -5% in volume



17,6%

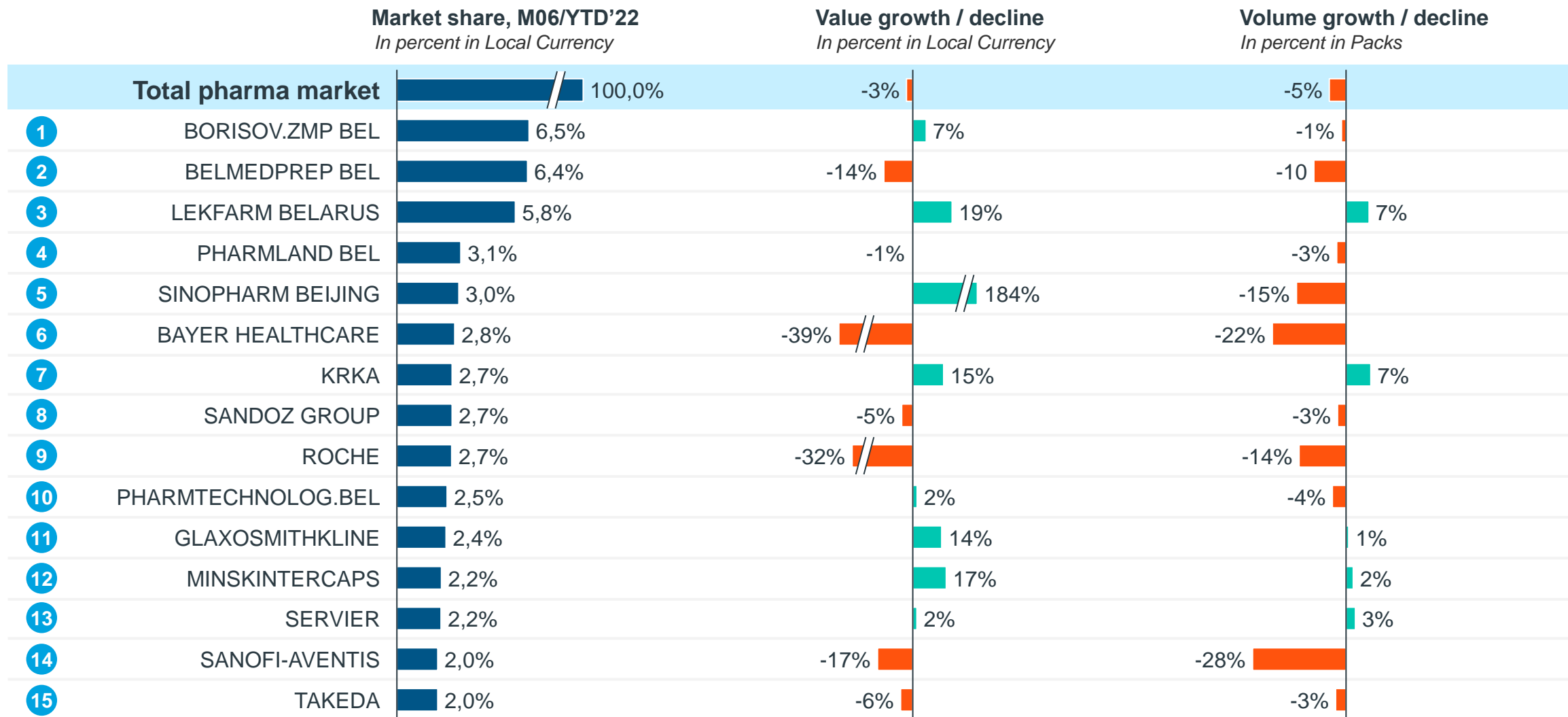


INFLATION

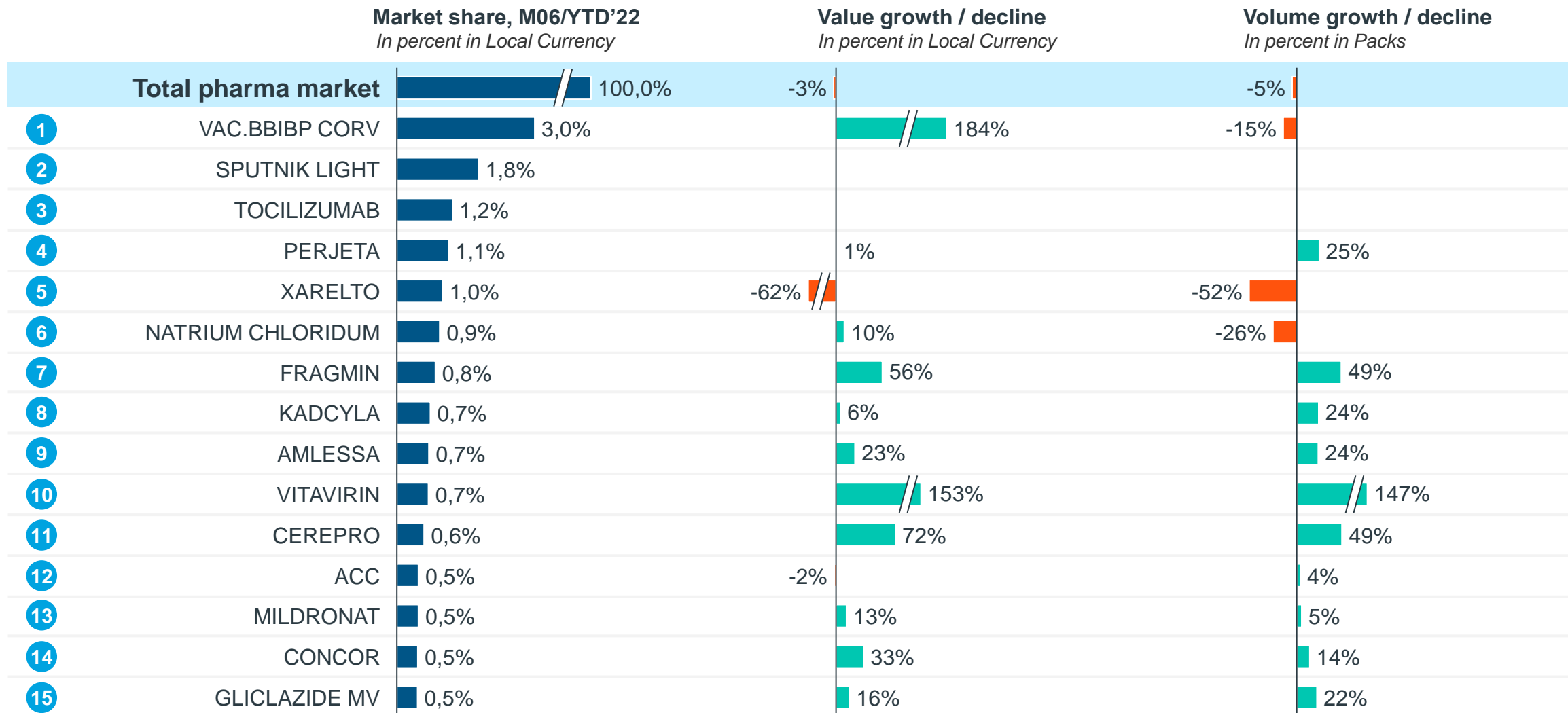


Indicator	BYN	USD	EUR	PACKS
Value M06/YTD'22, Bln.	1,35	0,50	0,46	0,17
Growth M06/YTD'22, %	▼ -3,1%	▼ -8,0%	▲ 1,4%	▼ -5,0%

TOP-15 corporations on Belarus market, June 2022



TOP-15 brands on Belarus market, June 2022



Uzbekistan pharma market growth in June 2022

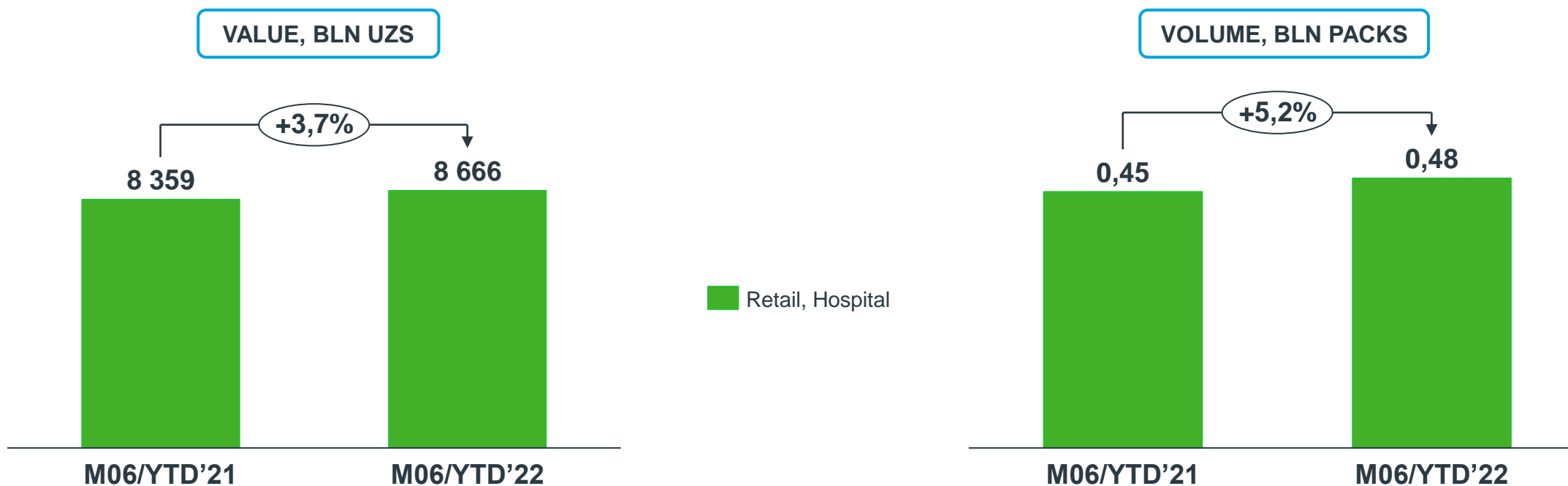
Market grew by 4% in value and 5% in volume



12,2%

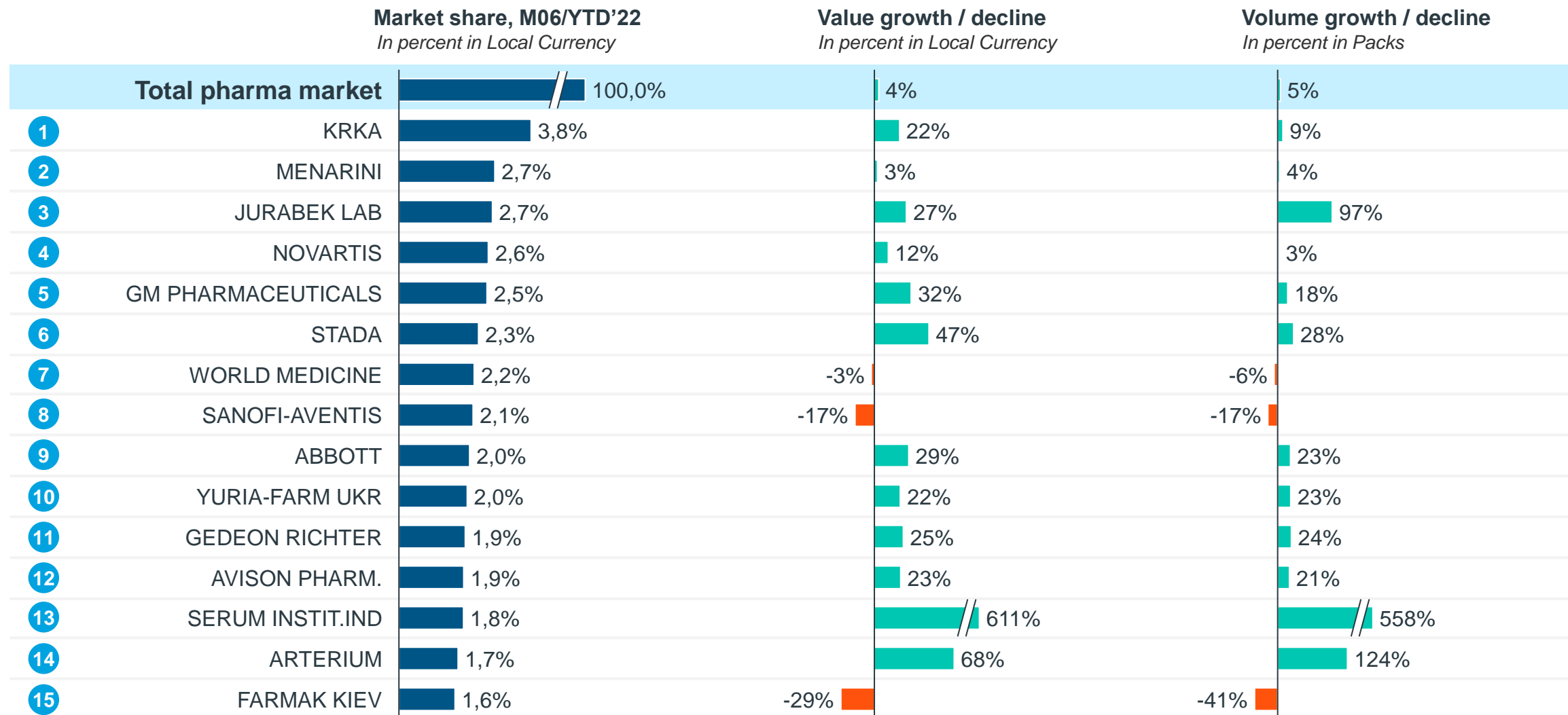


INFLATION



Indicator	UZS	USD	EUR	PACKS
Value M06/YTD'22, Bln.	8 666	0,79	0,72	0,48
Growth M06/YTD'22, %	▲ 3,7%	▼ -1,0%	▲ 8,8%	▲ 5,2%

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



	Market share, M06/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%	4%	5%
1 VACC.PNEUMOC.C.10V	1,6%	561%	77%
2 QUPEN	1,3%	89%	49%
3 SERMIN	0,8%	78%	61%
4 NATRIUM CHLORIDUM	0,8%	182%	93%
5 TIVORTIN	0,8%	9%	8%
6 L-LYSINE AESCINATE	0,7%	55%	46%
7 CEFTRIAXONE	0,7%	34%	49%
8 ACC	0,7%	18%	10%
9 VIFERON	0,6%	34%	39%
10 NIMESIL	0,6%	14%	15%
11 THERAFLU	0,6%	-3%	-2%
12 AMLESSA	0,6%	41%	29%
13 CALCIUM D3 NYCOMED	0,6%	160%	156%
14 TYLOLFEN HOT	0,5%	64%	55%
15 ORSA	0,5%	124%	107%

Kyrgyzstan pharma market growth in June 2022

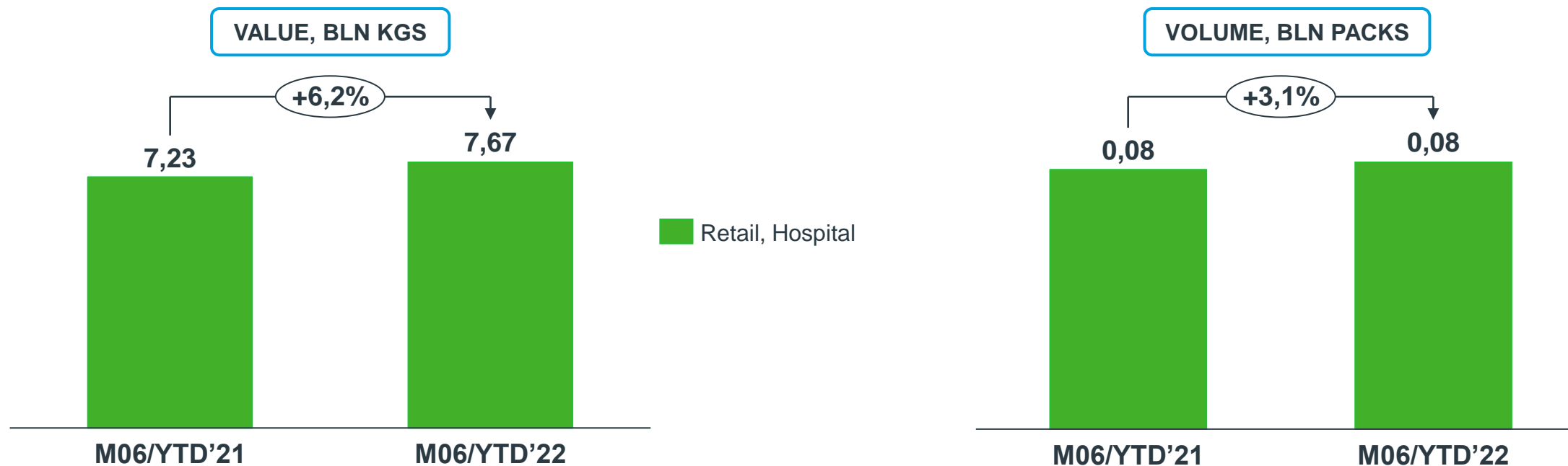
Market grew by 6% in value and by 3% in volume



13,1%

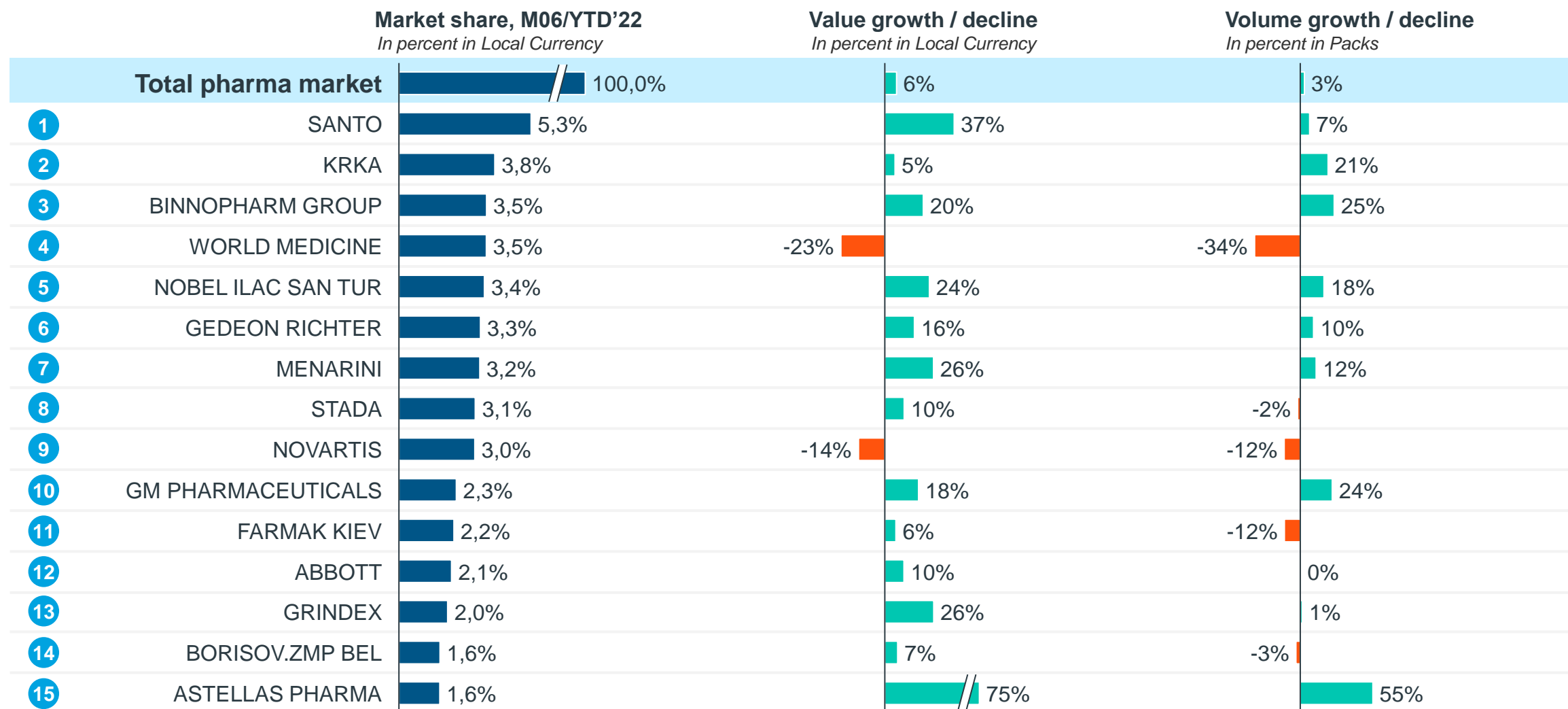


INFLATION

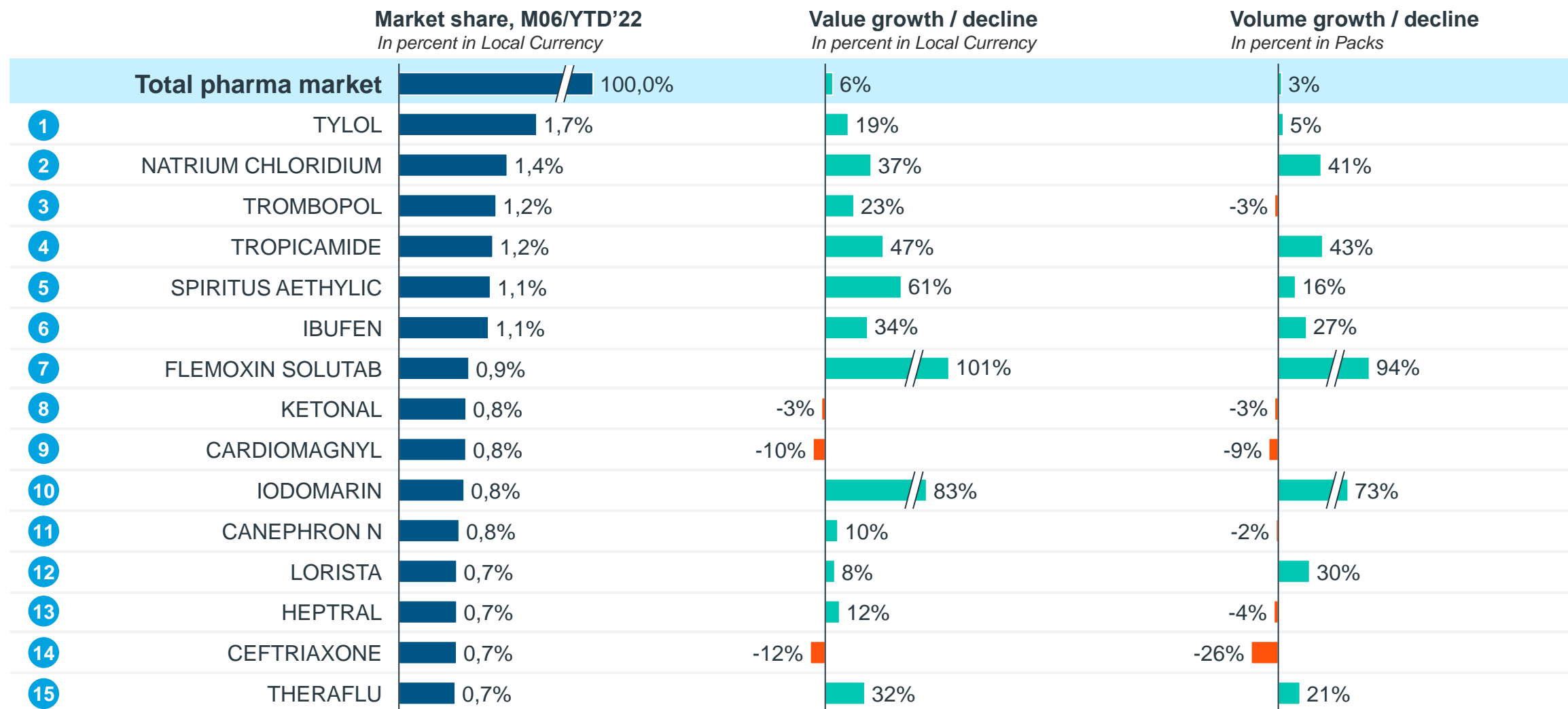


Indicator	KGS	USD	EUR	PACKS
Value M06/YTD'22, Bln.	7,7	0,09	0,08	0,08
Growth M06/YTD'22, %	▲ 6,2%	▲ 5,6%	▲ 16%	▲ 3,1%

TOP-15 corporations on Kyrgyzstan market, June 2022



TOP-15 brands on Kyrgyzstan market, June 2022



Mongolia pharma market growth in June 2022

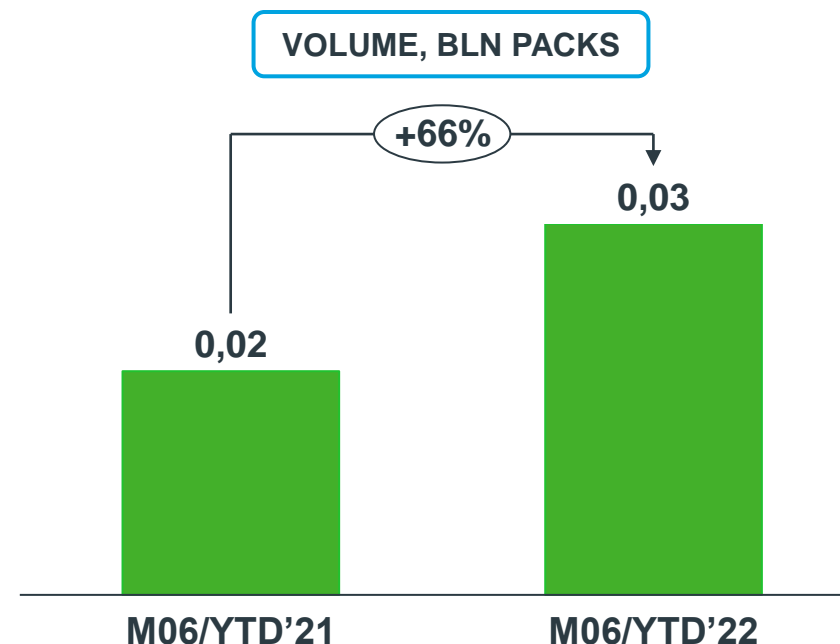
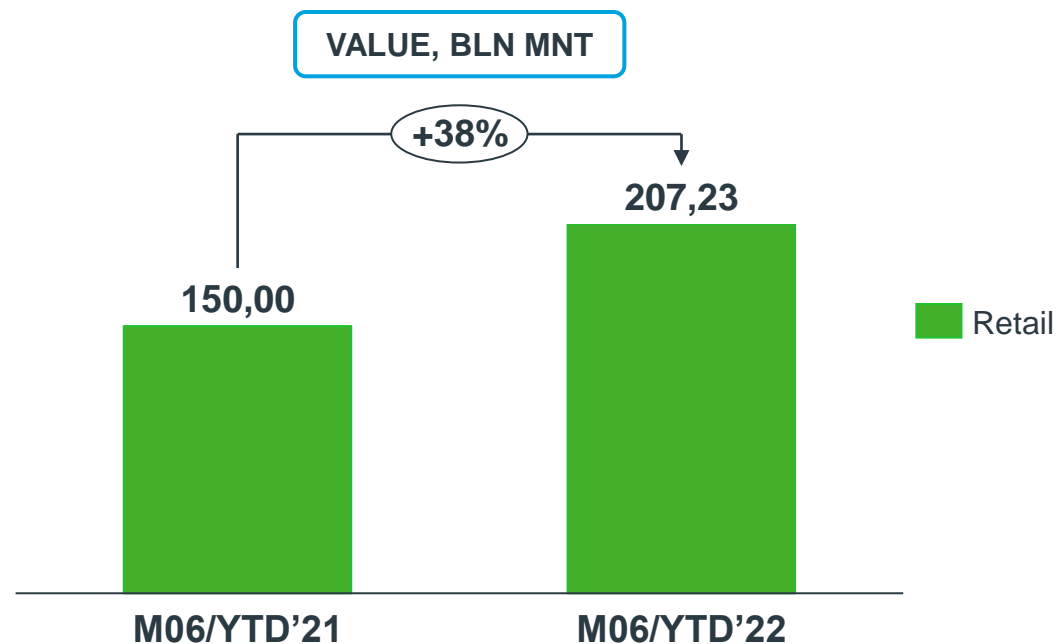
Market grew by 38% in value and by 66% in volume



16,1%

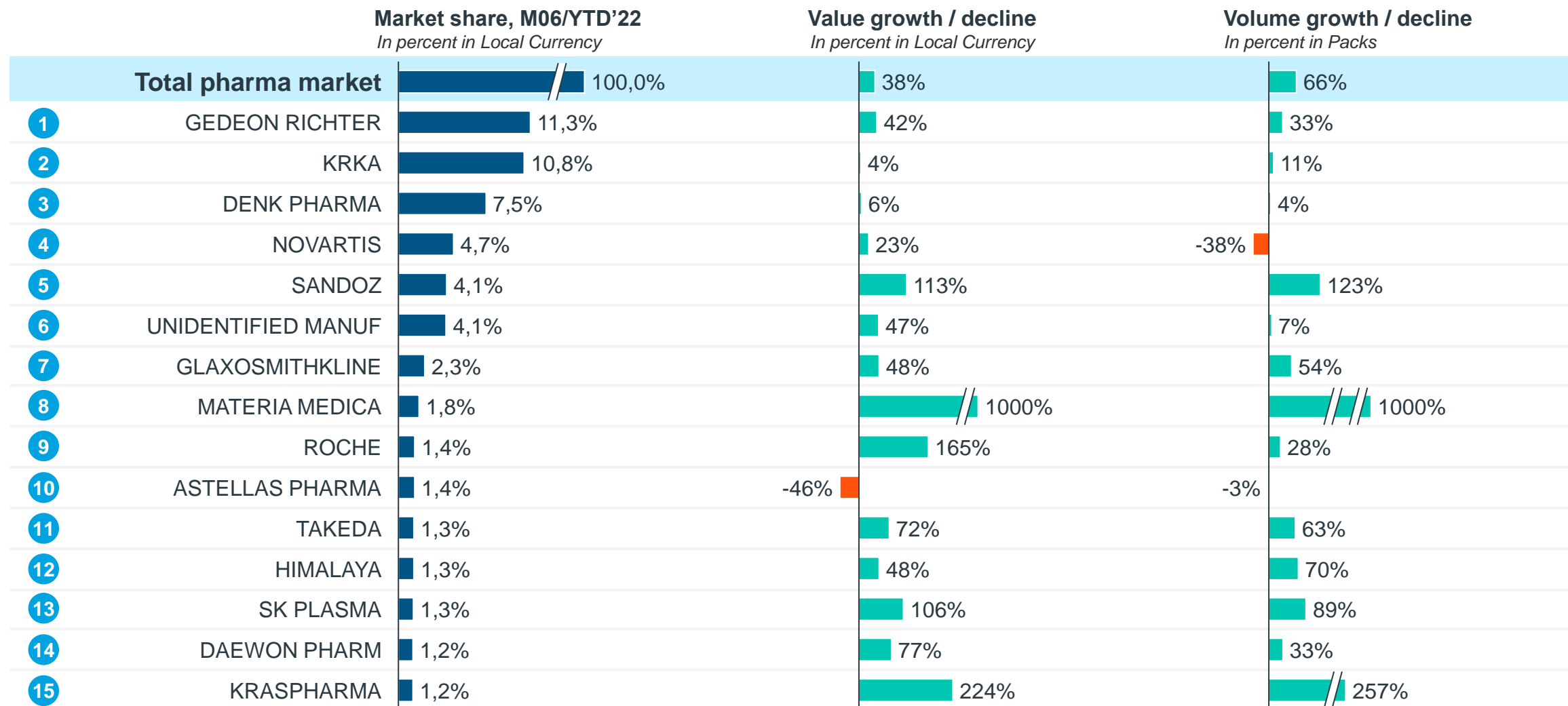


INFLATION

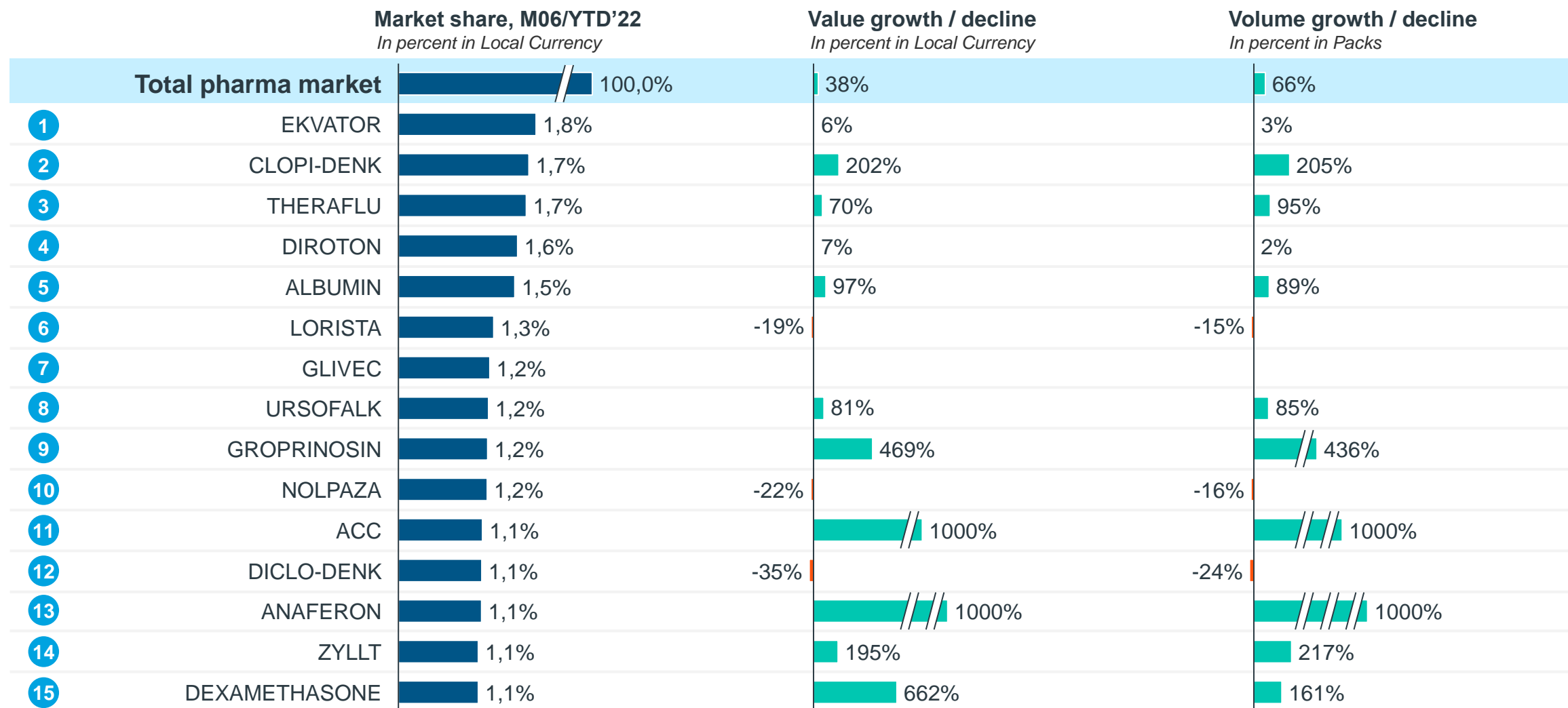


Indicator	MNT	USD	EUR	PACKS
Value M06/YTD'22, Bln.	207	0,07	0,06	0,03
Growth M06/YTD'22, %	▲ 38%	▲ 32%	▲ 46%	▲ 66%

TOP-15 corporations on Mongolia market, June 2022



TOP-15 brands on Mongolia market, June 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