

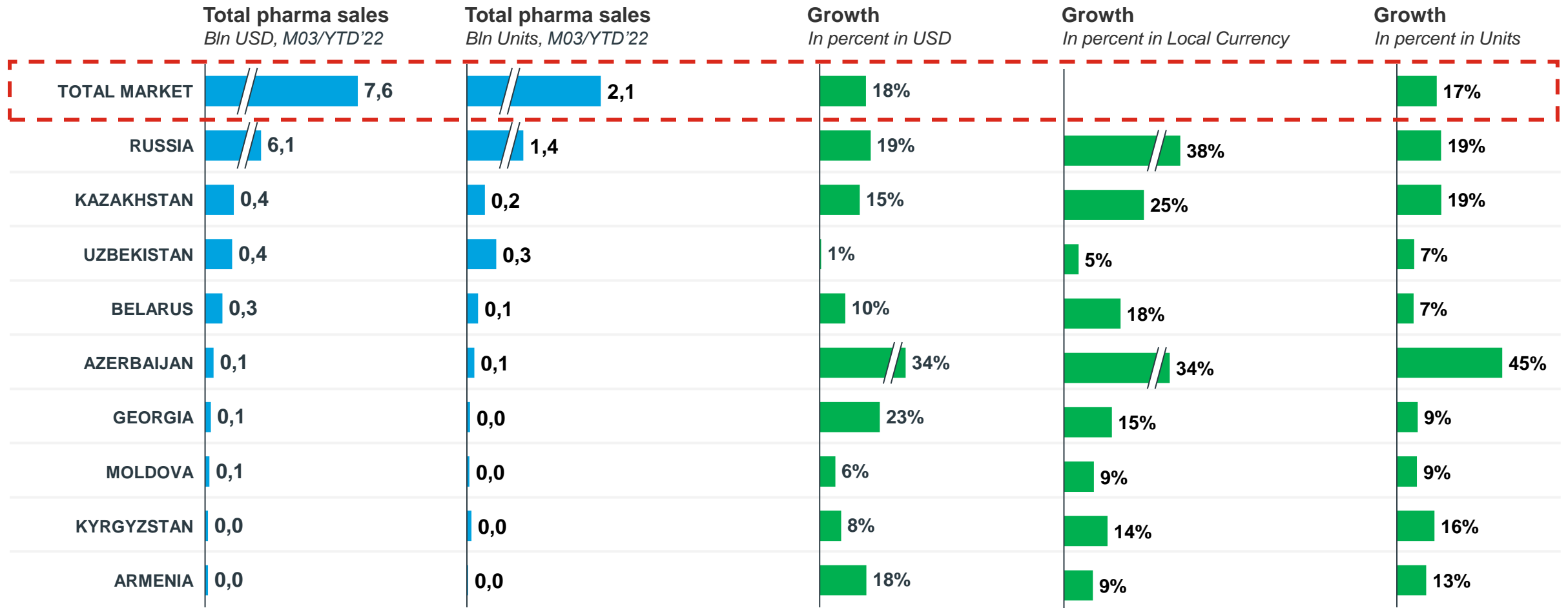


Facts from IQVIA

M03 2022

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

Total Market grew by 18% in USD and by 17% in Units





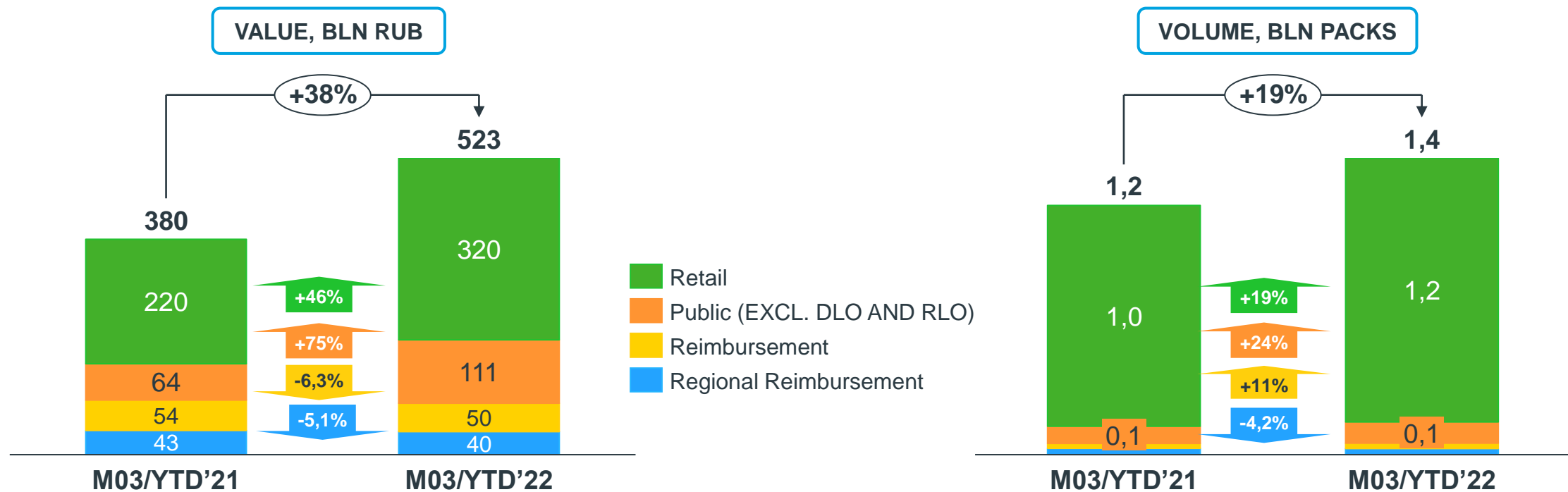
16,7%



INFLATION

Russian pharma market growth in March 2022

Market grew by 38% in value and 19% in volume



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

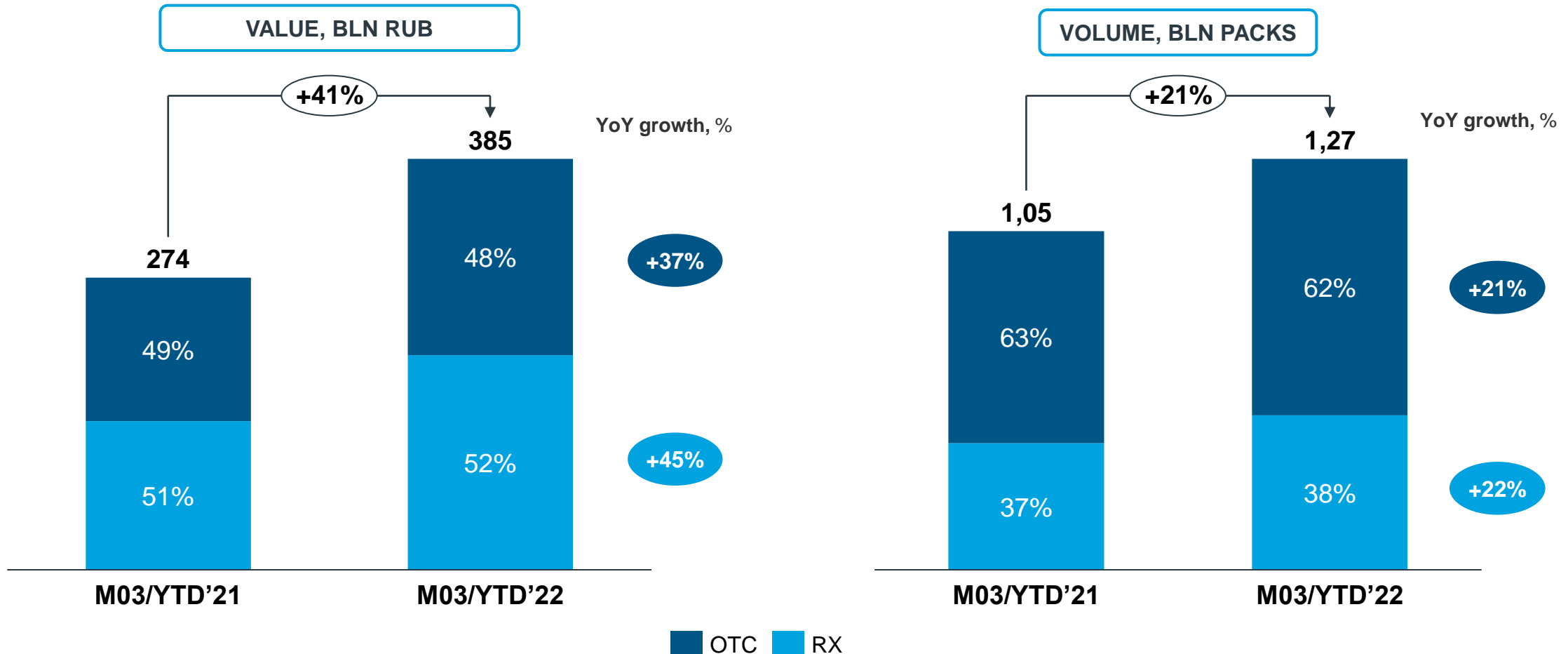
Indicator	RUB	USD	EUR	PACKS
Value M03/YTD'22, Bln.	523	6,1	5,4	1,4
Growth M03/YTD'22, %	▲ 38%	▲ 19%	▲ 28%	▲ 19%

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



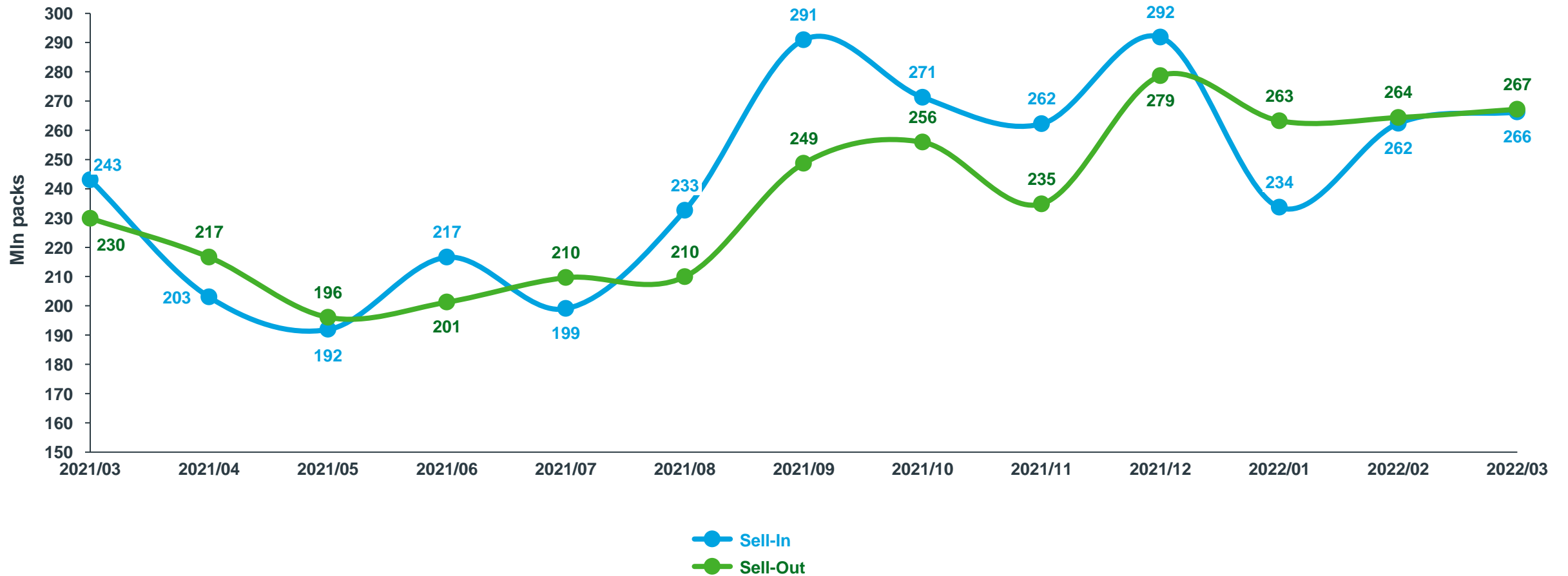
Russian pharma market increase in March 2022

Retail Sell-Out: Market grew by 41% in value and 21% in volume





Sell-In vs Sell-Out, OTC registered drugs



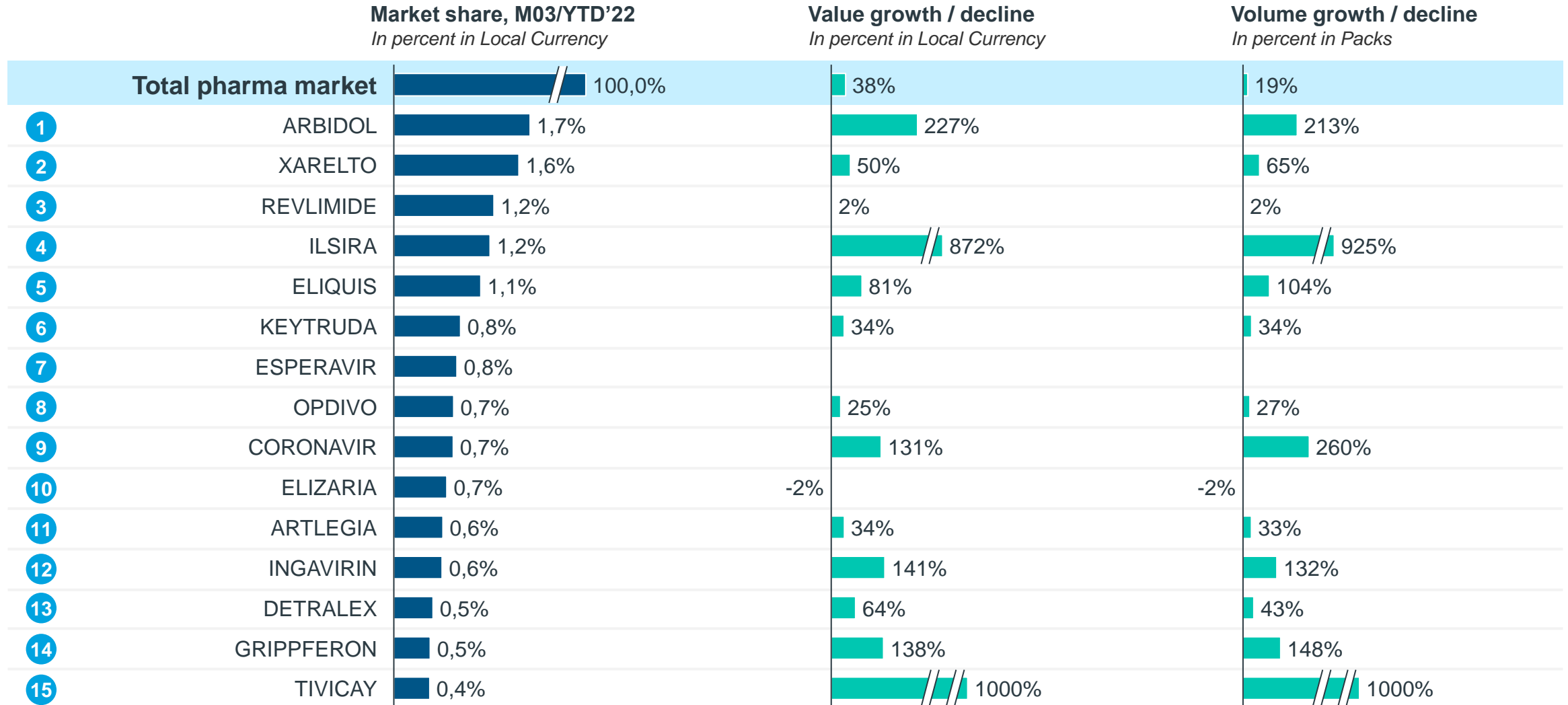


TOP-15 corporations on Russian market, March 2022

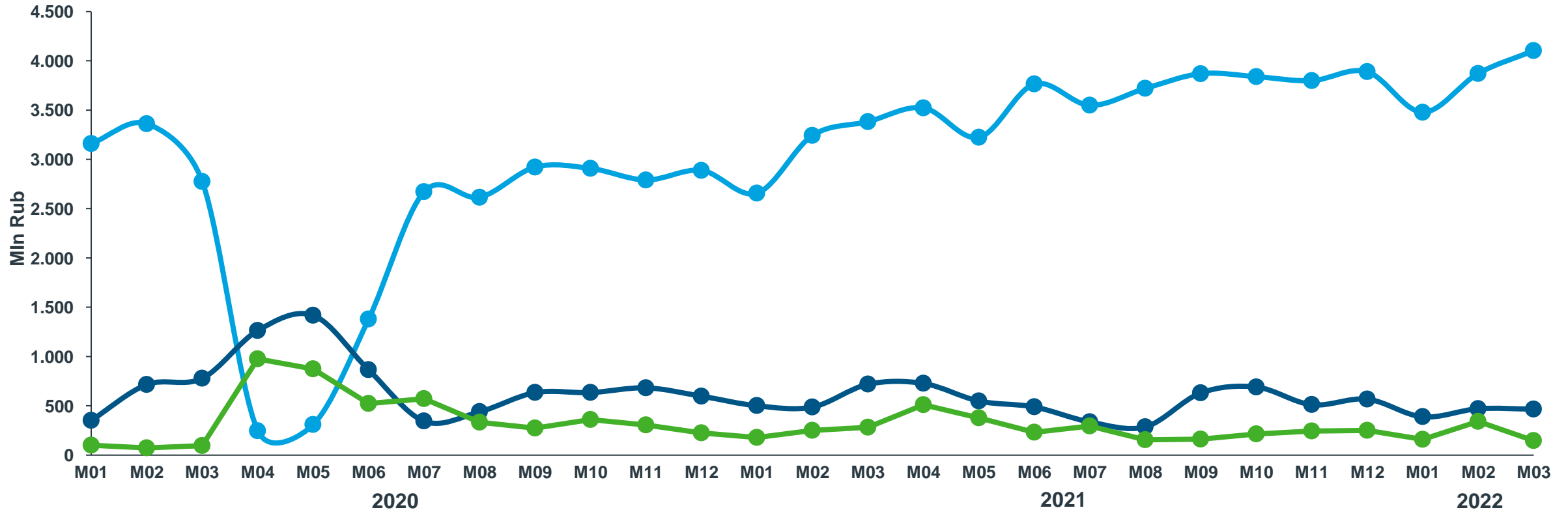
		Market share, M03/YTD'22 <i>In percent in Local Currency</i>	Value growth / decline <i>In percent in Local Currency</i>	Volume growth / decline <i>In percent in Packs</i>
Total pharma market		100,0%	38%	19%
1	BAYER HEALTHCARE	4,1%	39%	14%
2	SANOFI-AVENTIS	3,2%	22%	19%
3	OTCPHARM	3,2%	83%	39%
4	JOHNSON & JOHNSON	2,8%	2%	24%
5	NOVARTIS	2,8%	33%	38%
6	BIOCAD RF	2,7%	66%	31%
7	STADA	2,4%	49%	17%
8	GLAXOSMITHKLINE	2,3%	101%	39%
9	ROCHE	2,3%	37%	20%
10	ASTRAZENECA	2,2%	51%	47%
11	SERVIER	2,2%	59%	36%
12	TAKEDA	2,1%	18%	14%
13	PFIZER	2,0%	9%	18%
14	ABBOTT	1,9%	49%	35%
15	KRKA	1,9%	49%	38%



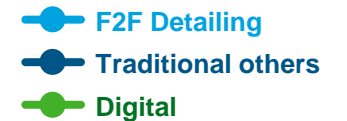
TOP-15 brands on Russian market, March 2022



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

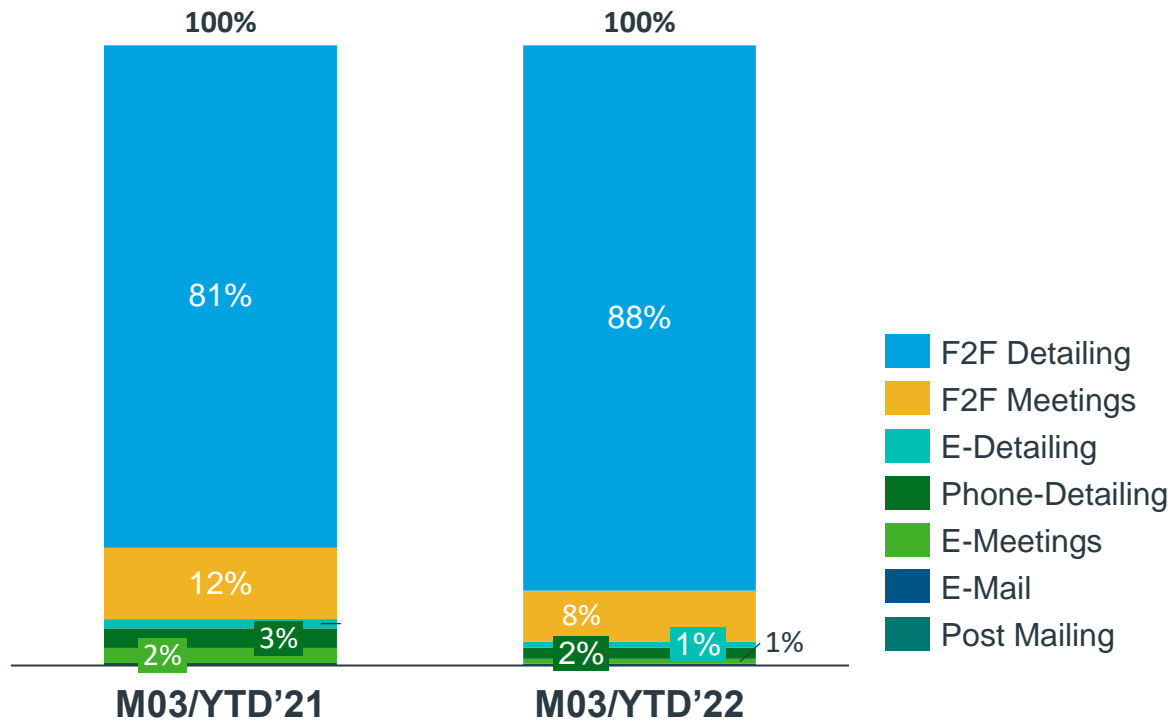


Value – a cost of each interaction projected on doctor’s universe

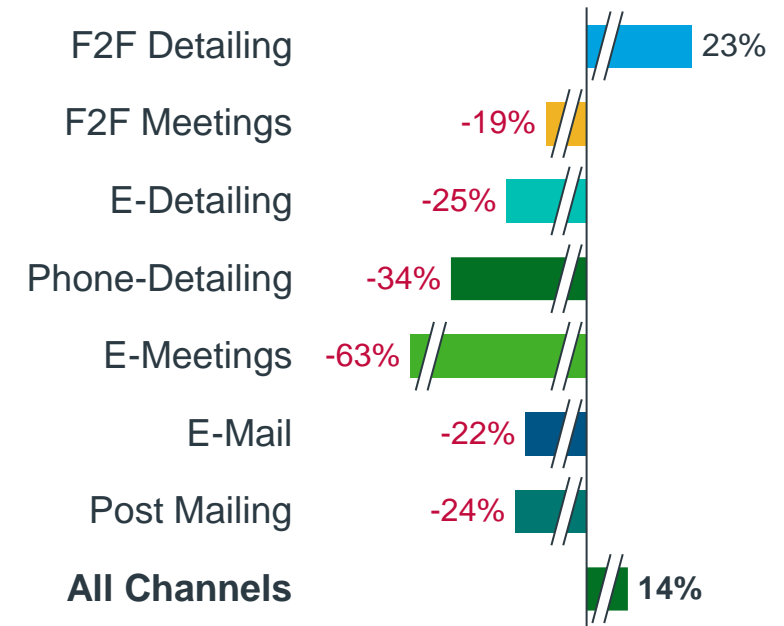
Total Market overall promotional value in Rub increased by 14%, YTD March 2022 vs 2021



Promotional value in Rub share by channel



% Changes in promotional value in Rub by channel YTD March 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

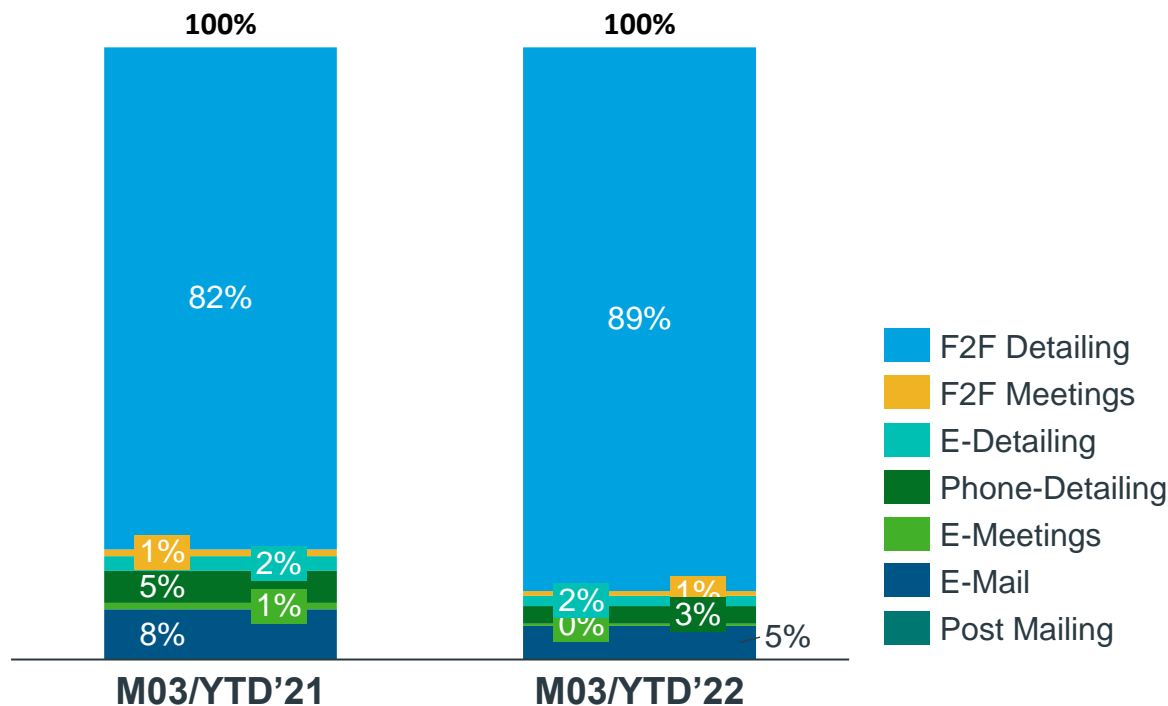
Value – a cost of each interaction projected on doctor's universe

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.

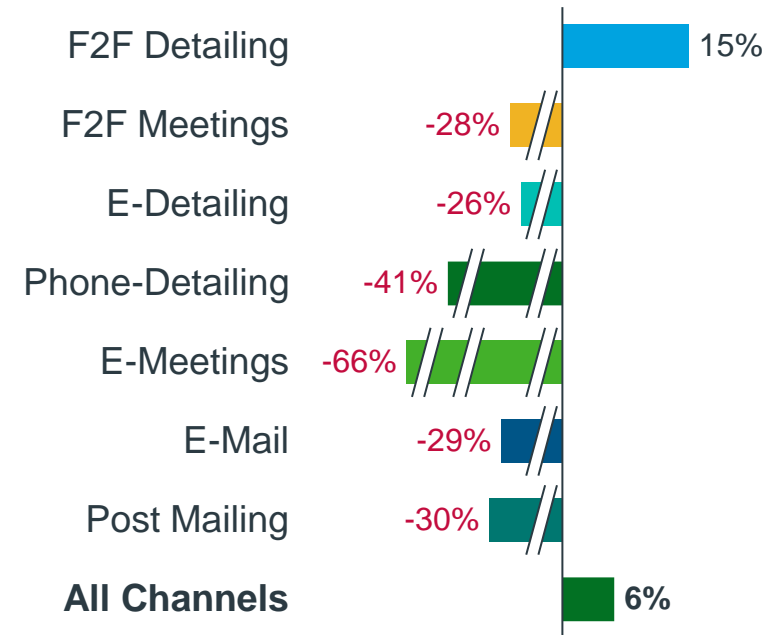
Total Market overall promotional volume (contacts) increased by 6%, YTD March 2022 vs 2021



Promotional value in Rub share by channel



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



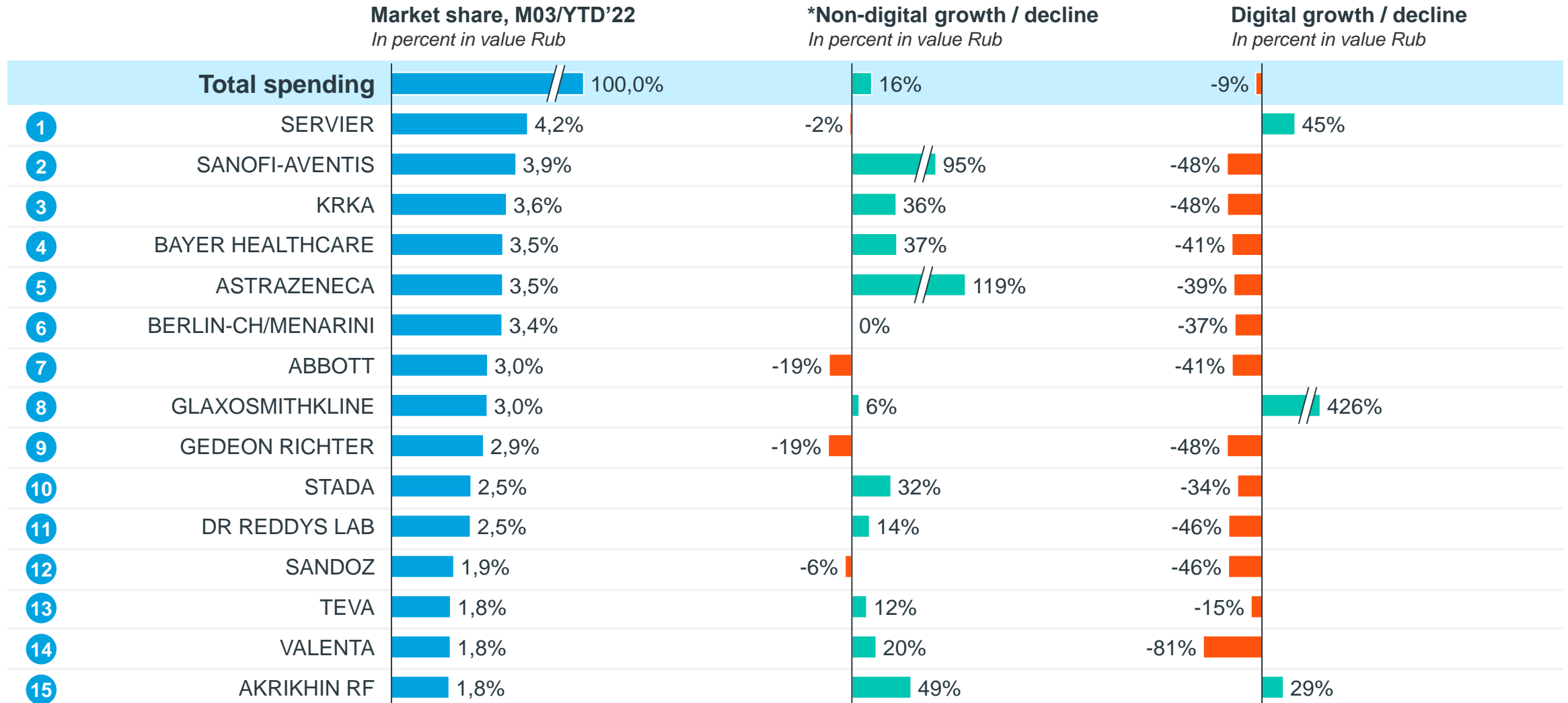
F2F Detailing – Reps visits. **Traditional others:** 1) F2F meetings – group meetings, round tables etc, 2) Phone Detailing – phone calls, 3) E-mail – communication via email. 4) Post Mailing – paper mails. **Digital:** 1) E-detailing – 1-1 calls visits using digitabl platforms 2) E-meetings – group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



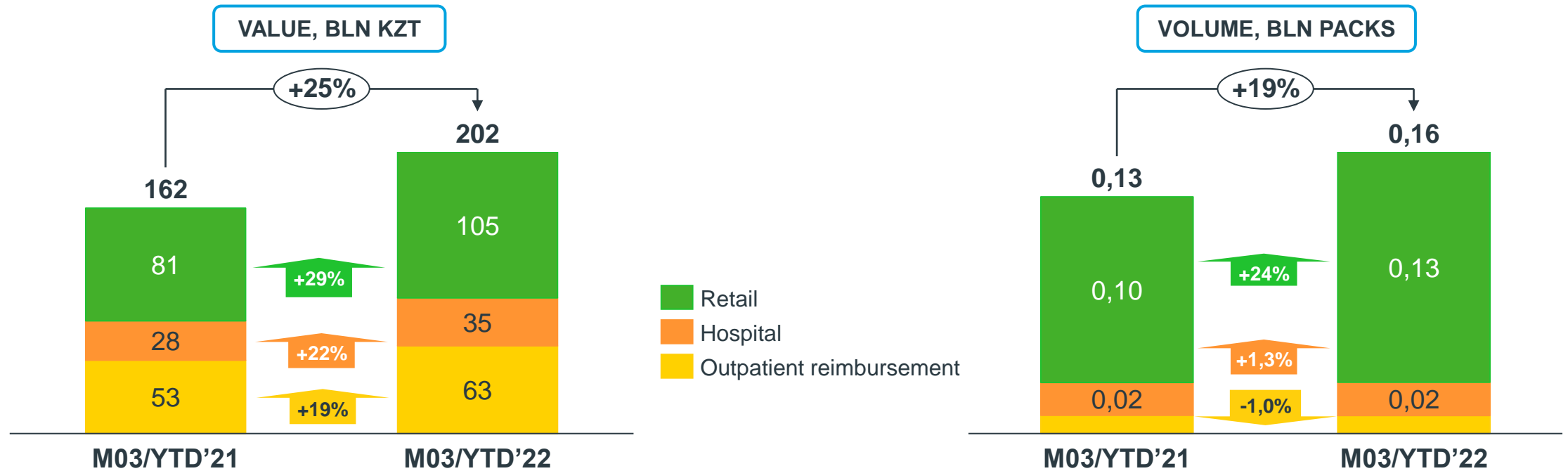
12,0%



INFLATION

Kazakhstan pharma market growth in March 2022

Market grew by 25% in value and 19% in volume

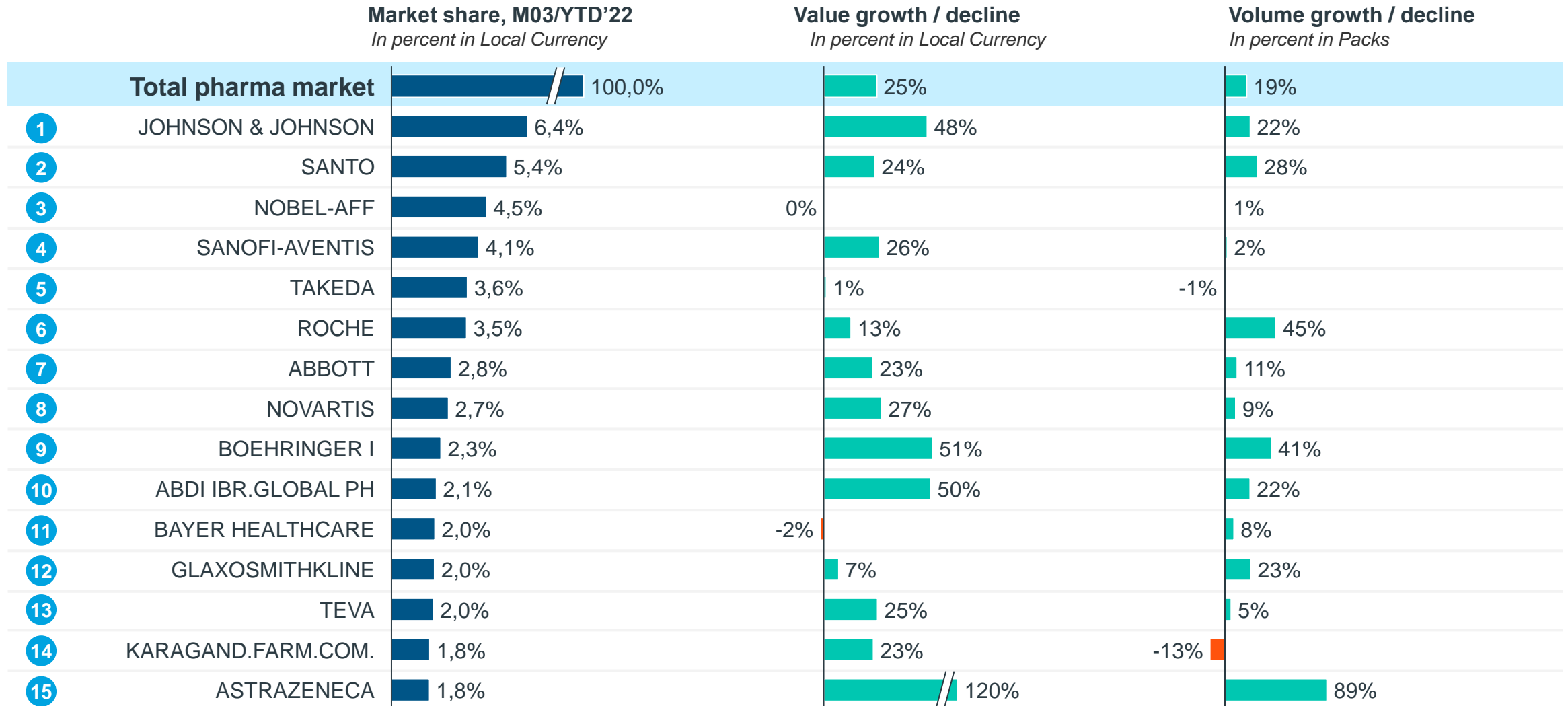


Indicator	KZT	USD	EUR	PACKS
Value M03/YTD'22, Bln.	202	0,44	0,39	0,16
Growth M03/YTD'22, %	▲ 25%	▲ 15%	▲ 24%	▲ 19%

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

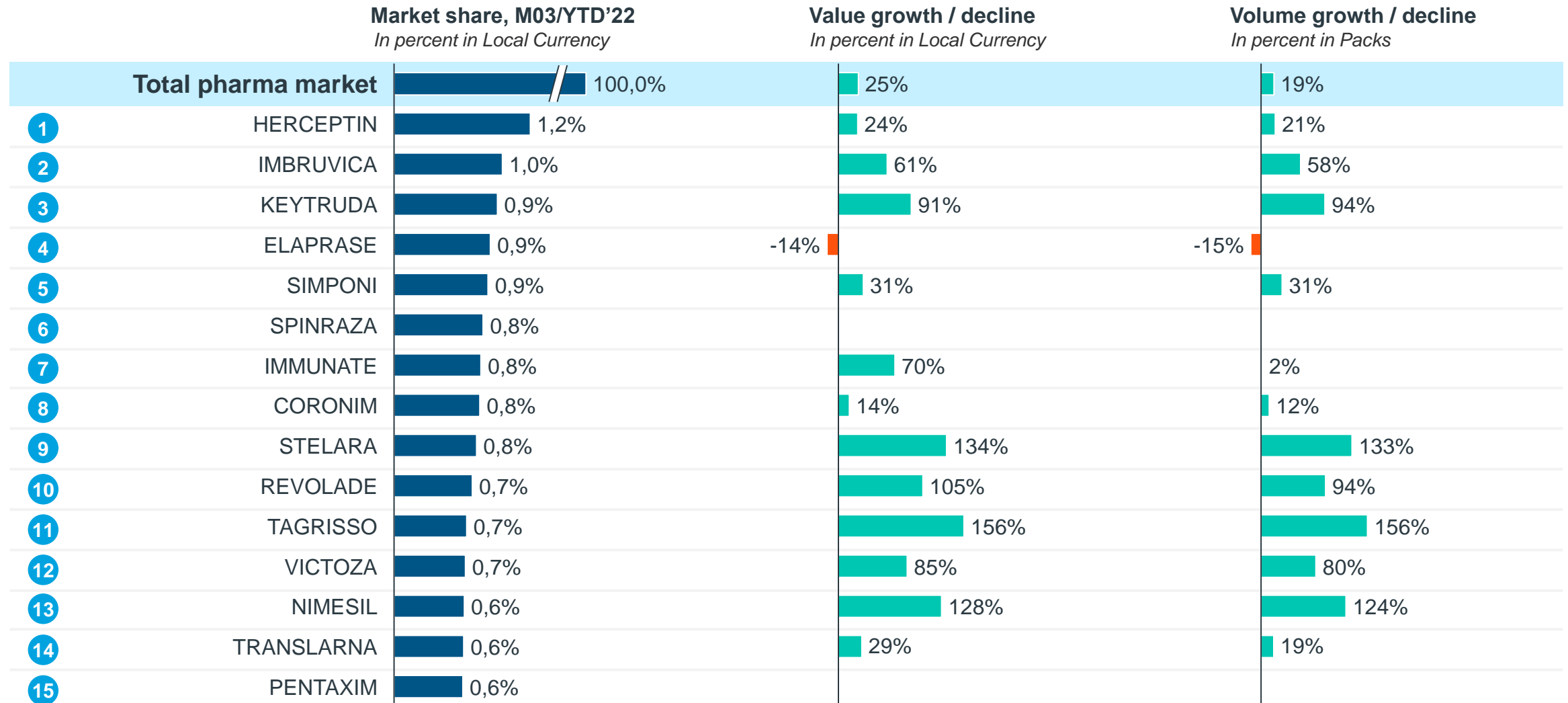


TOP-15 corporations on Kazakhstan market, March 2022





TOP-15 brands on Kazakhstan market, March 2022





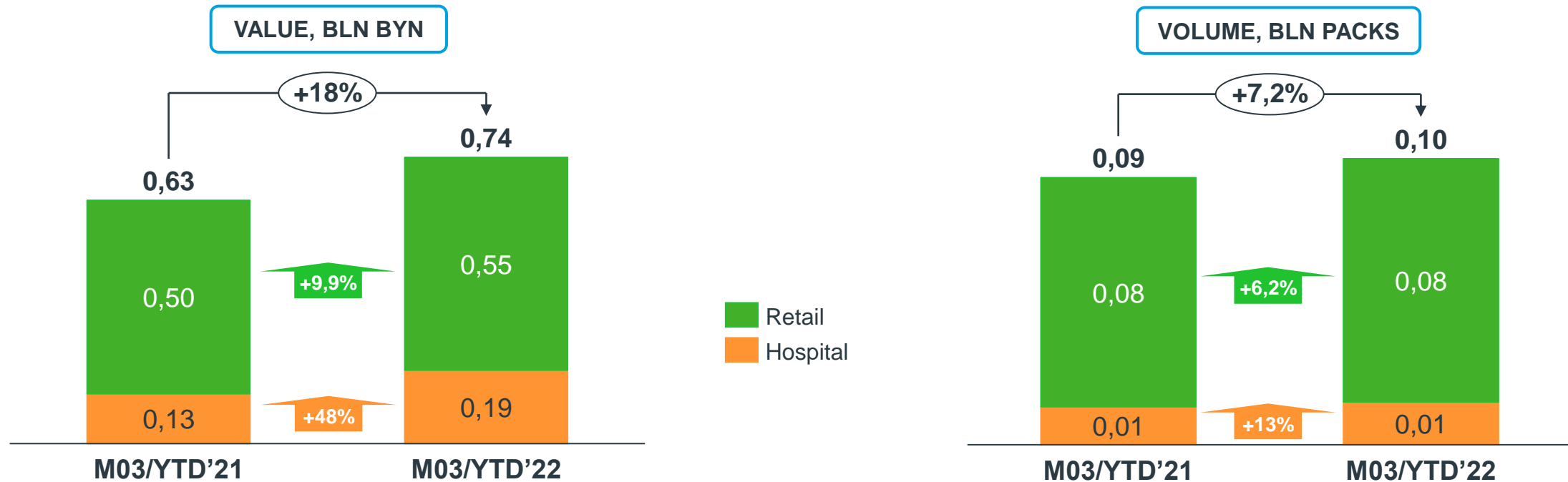
15,9%



INFLATION

Belarus pharma market growth in March 2022

Market grew by 18% in value and 7% in volume

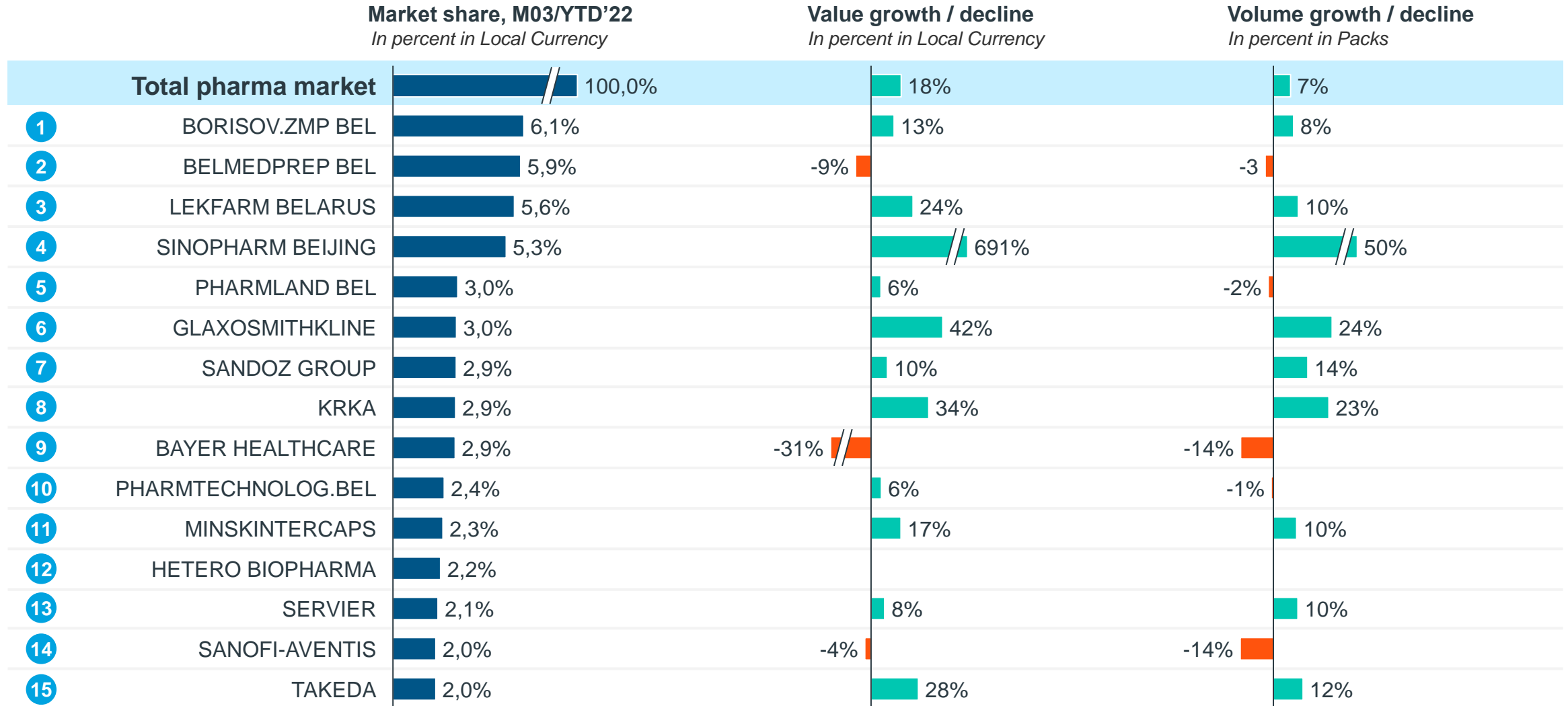


Indicator	BYN	USD	EUR	PACKS
Value M03/YTD'22, Bln.	0,74	0,27	0,24	0,10
Growth M03/YTD'22, %	▲ 18%	▲ 10%	▲ 18%	▲ 7,2%

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



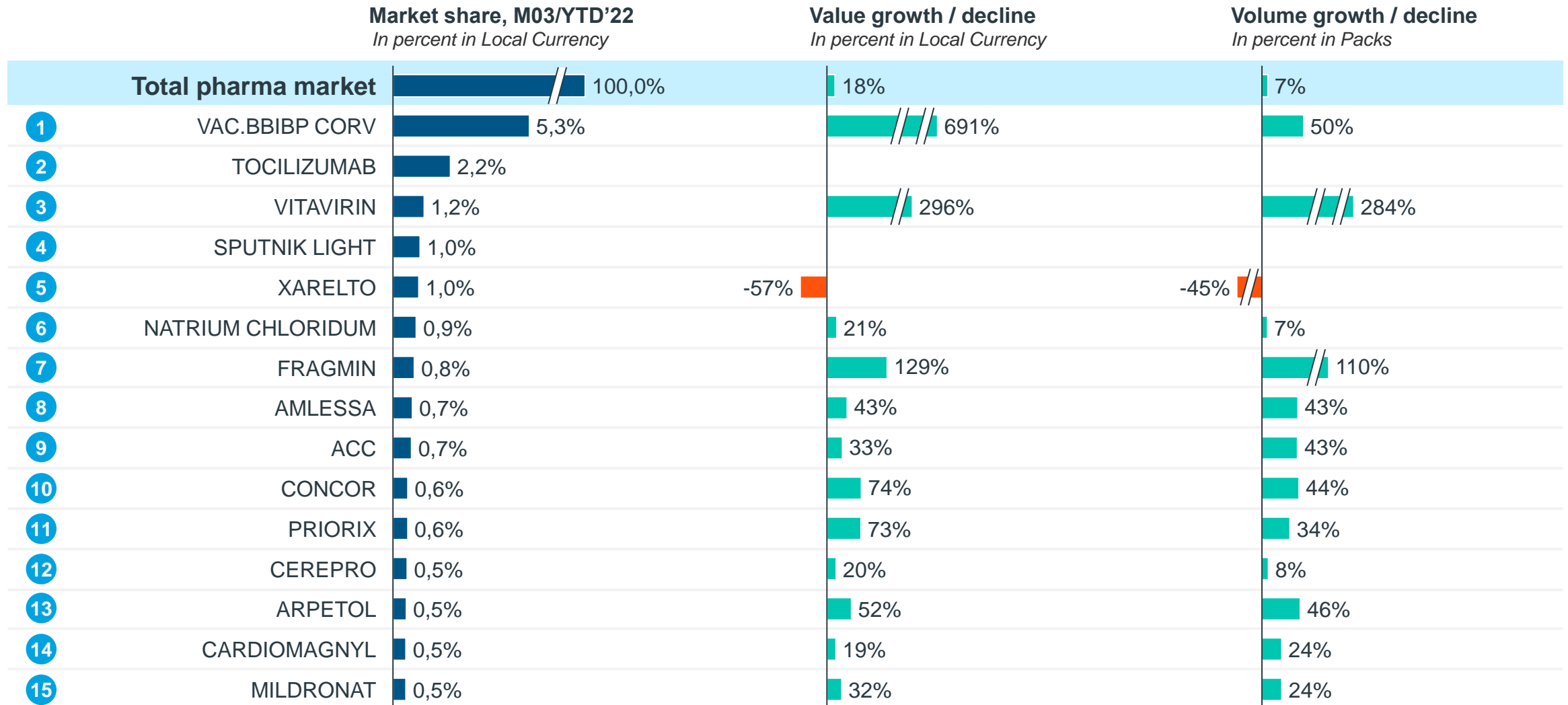
TOP-15 corporations on Belarus market, March 2022



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



TOP-15 brands on Belarus market, March 2022





10,5%



INFLATION

Uzbekistan pharma market growth in March 2022

Market grew by 5% in value and 7% in volume



Indicator	UZS	USD	EUR	PACKS
Value M03/YTD'22, Bln.	4 546	0,42	0,37	0,26
Growth M03/YTD'22, %	▲ 4,6%	▲ 0,5%	▲ 7,8%	▲ 7,4%



TOP-15 corporations on Uzbekistan market, March 2022

		Market share, M03/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%	5%	7%
1	KRKA	3,7%	7%	2%
2	SERUM INSTIT.IND	3,3%	613%	393%
3	NOVARTIS	3,2%	69%	40%
4	JURABEK LAB	2,5%	145%	113%
5	GM PHARMACEUTICALS	2,3%	30%	21%
6	WORLD MEDICINE	2,2%	14%	16%
7	FARMAK KIEV	2,2%	5%	-17%
8	MENARINI	2,1%	13%	13%
9	STADA	1,9%	24%	-13%
10	ARTERIUM	1,8%	105%	121%
11	SANOFI-AVENTIS	1,8%	-29%	-35%
12	GEDEON RICHTER	1,7%	30%	36%
13	YURIA-FARM UKR	1,6%	16%	18%
14	BINNOPHARM GROUP	1,6%	26%	33%
15	AVISON PHARM.	1,4%	-28%	-29%

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, March 2022

		Market share, M03/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%	5%	7%
1	VACC.PNEUMOC.C.10V	3,1%	561%	77%
2	ACC	1,0%	67%	62%
3	QUPEN	1,0%	-3%	-25%
4	L-LYSINE AESCINATE	0,8%	111%	92%
5	NATRIUM CHLORIDUM	0,8%	214%	99%
6	THERAFLU	0,8%	-19%	-18%
7	VIFERON	0,8%	33%	47%
8	SEPTOLETE	0,7%	67%	59%
9	CEFTRIAZONE	0,7%	40%	89%
10	AZIMAC	0,7%	10%	1%
11	IROVIR-S	0,6%	80%	52%
12	SERMIN	0,6%	88%	71%
13	TIVORTIN	0,6%	-9%	-12%
14	FORXIGA	0,6%	621%	590%
15	CALCIUM D3 NYCOMED	0,6%	128%	124%



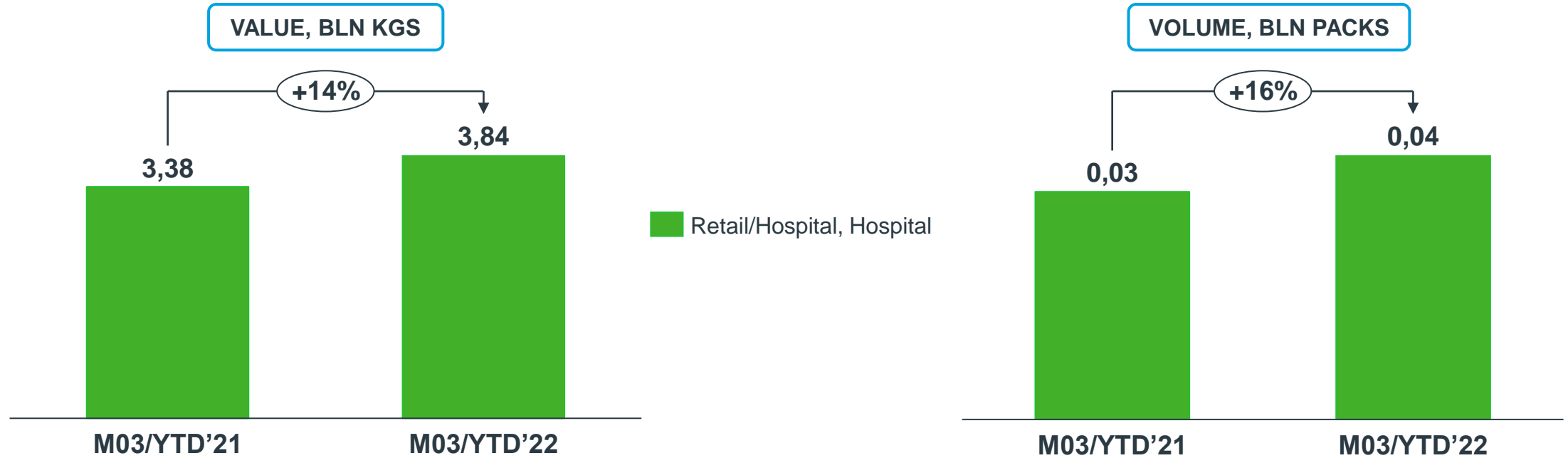
13,2%



INFLATION

Kyrgyzstan pharma market growth in March 2022

Market grew by 14% in value and by 16% in volume

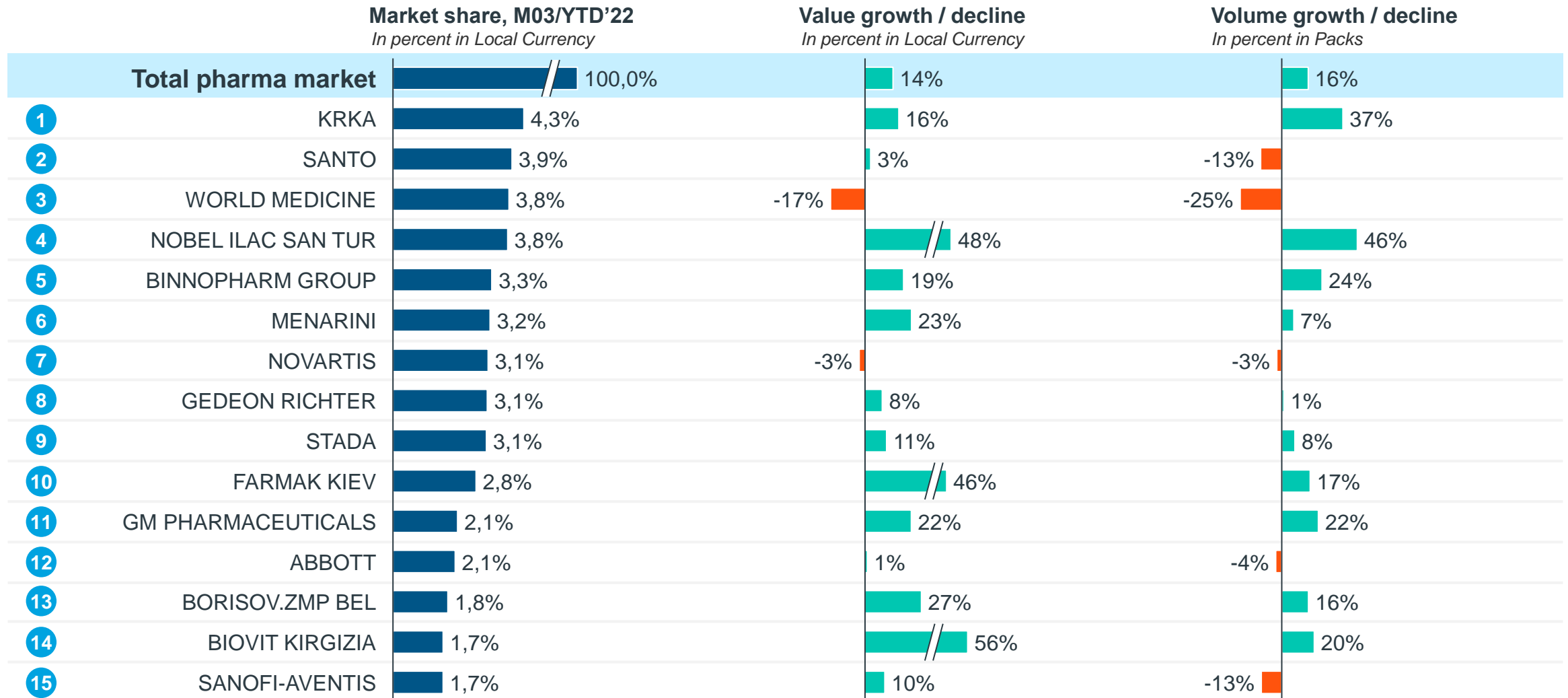


Indicator	KGS	USD	EUR	PACKS
Value M03/YTD'22, Bln.	3,8	0,04	0,04	0,04
Growth M03/YTD'22, %	▲ 14%	▲ 8,1%	▲ 16%	▲ 16%

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

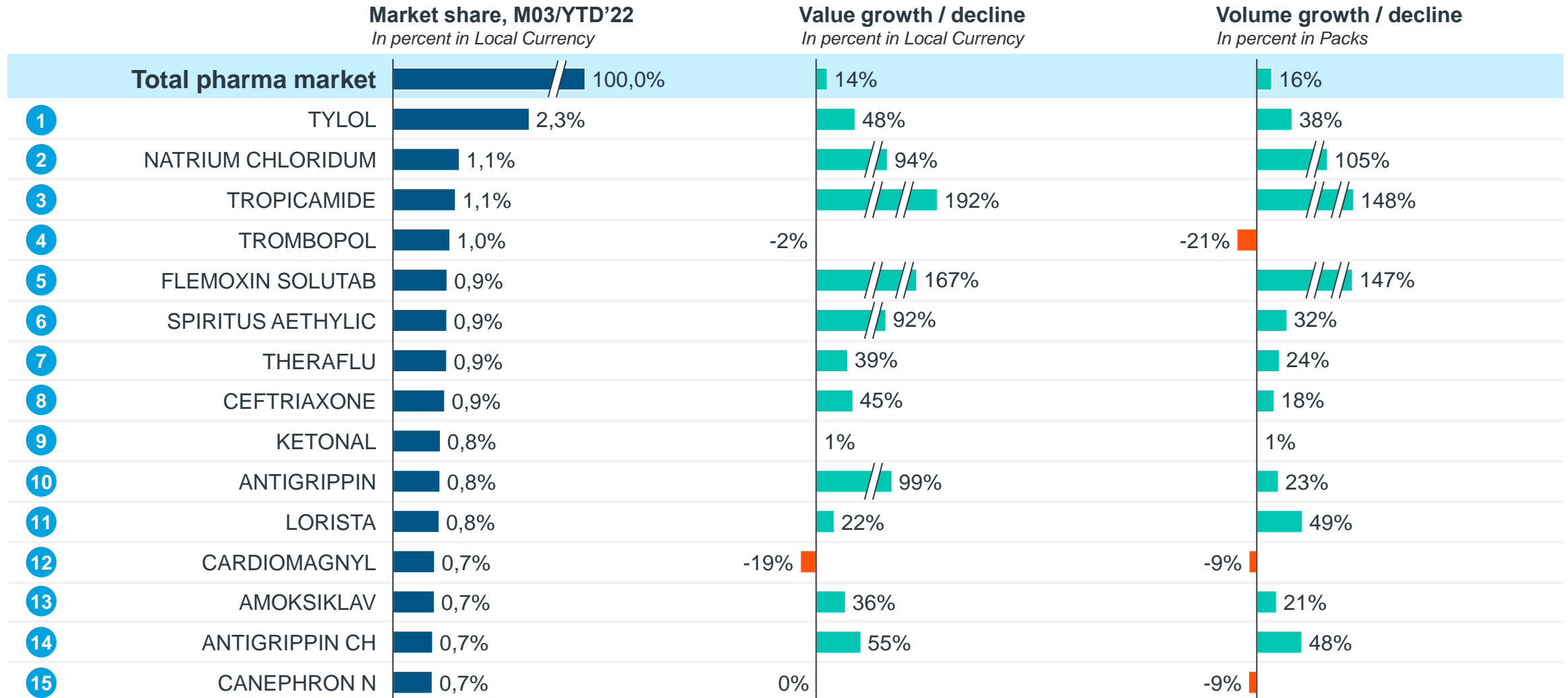


TOP-15 corporations on Kyrgyzstan market, March 2022





TOP-15 brands on Kyrgyzstan market, March 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