



Facts from IQVIA

M04 2022



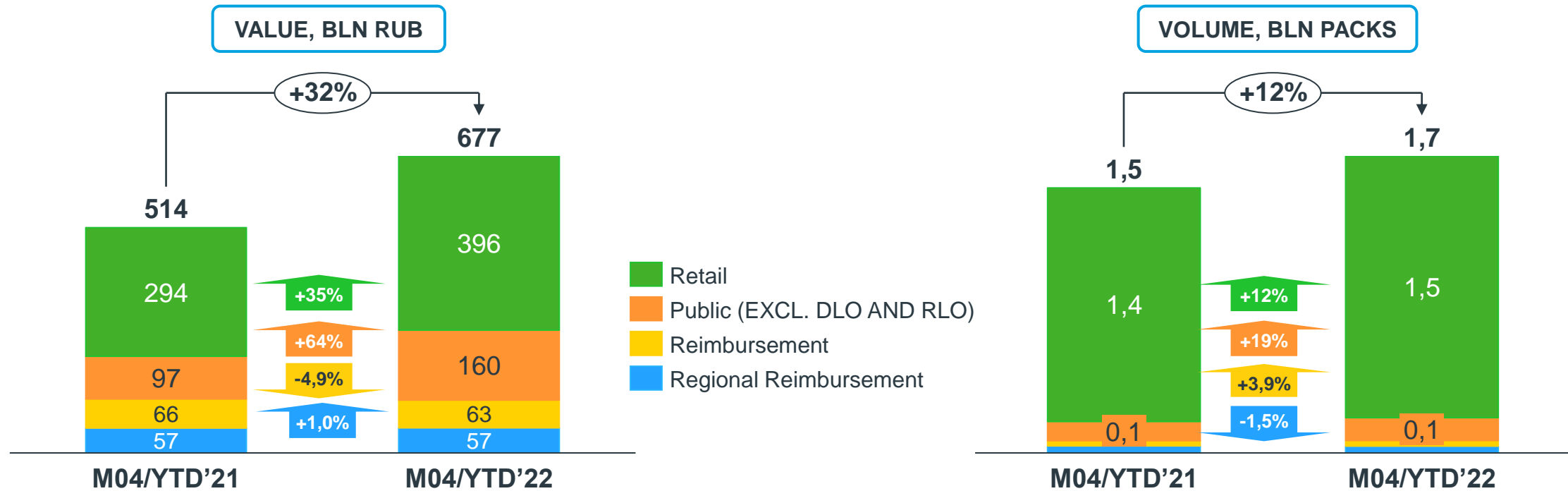
17,8%



INFLATION

Russian pharma market growth in April 2022

Market grew by 32% in value and 12% in volume



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

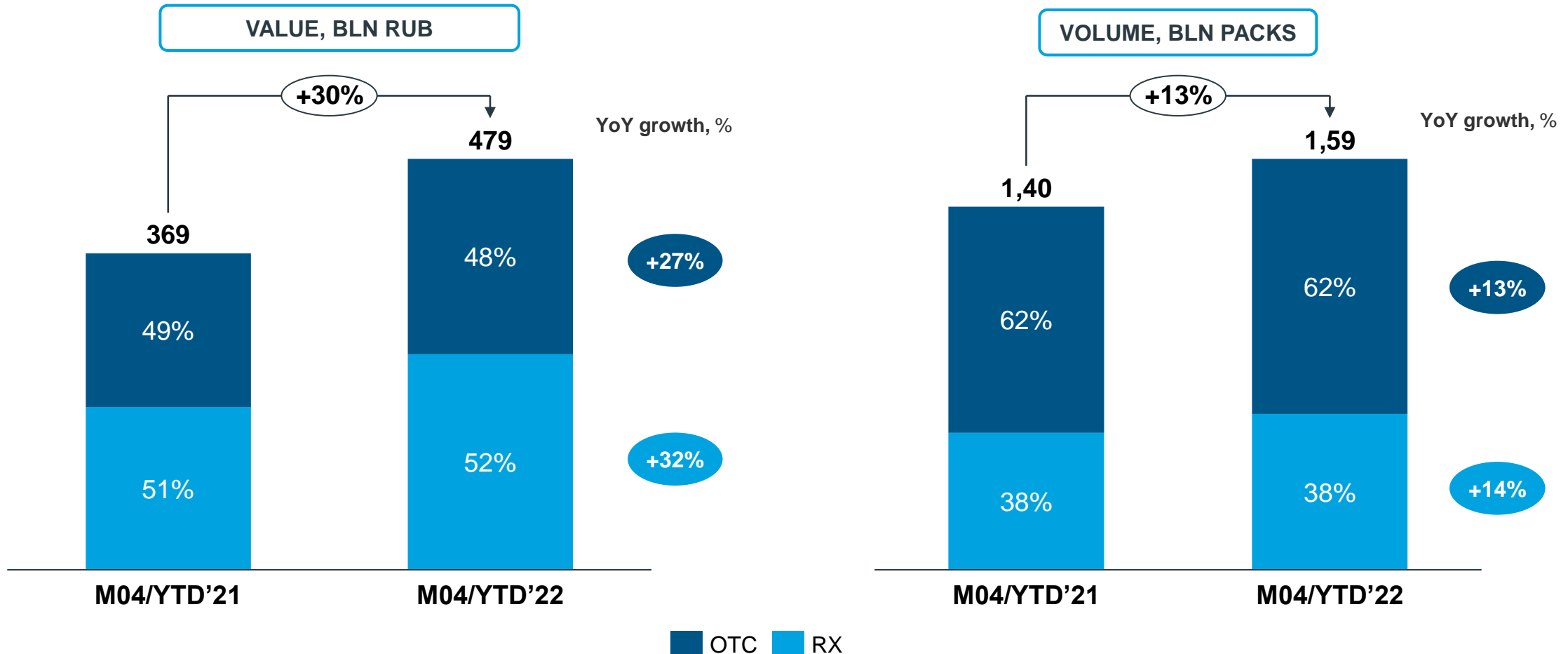
Indicator	RUB	USD	EUR	PACKS
Value M04/YTD'22, Bln.	677	8,1	7,3	1,7
Growth M04/YTD'22, %	▲ 32%	▲ 17%	▲ 27%	▲ 12%

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



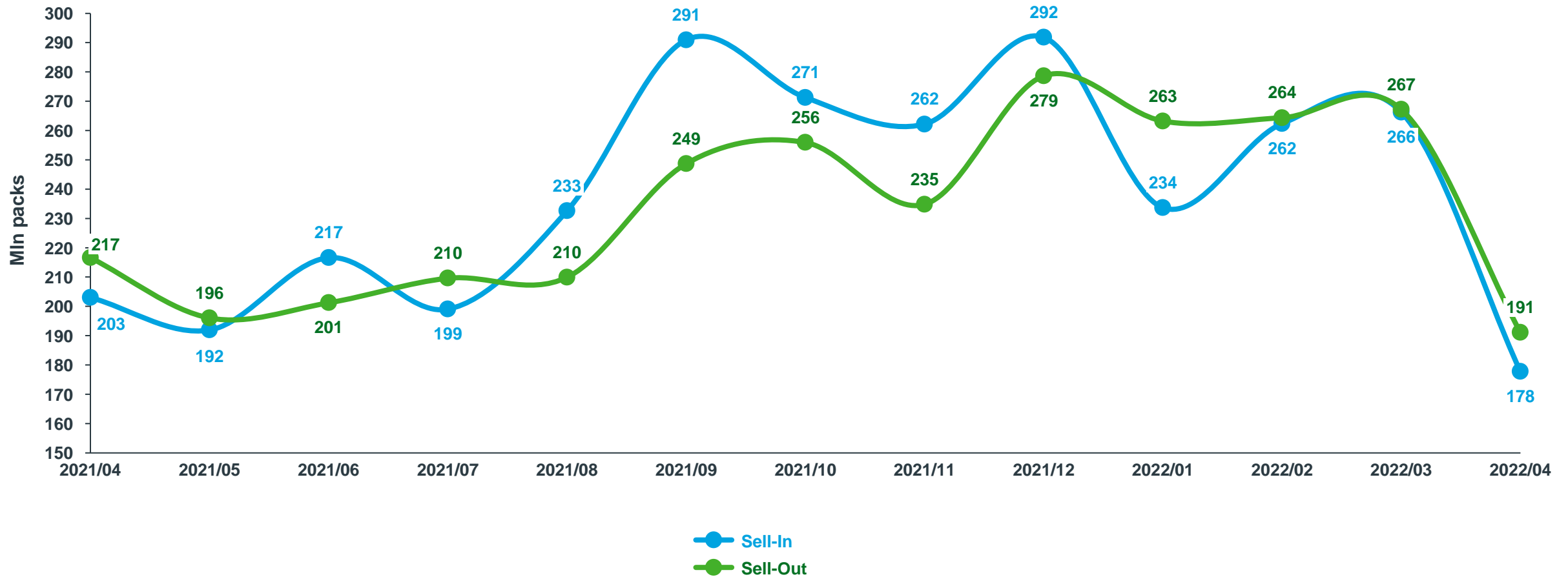
Russian pharma market increase in April 2022

Retail Sell-Out: Market grew by 30% in value and 13% in volume



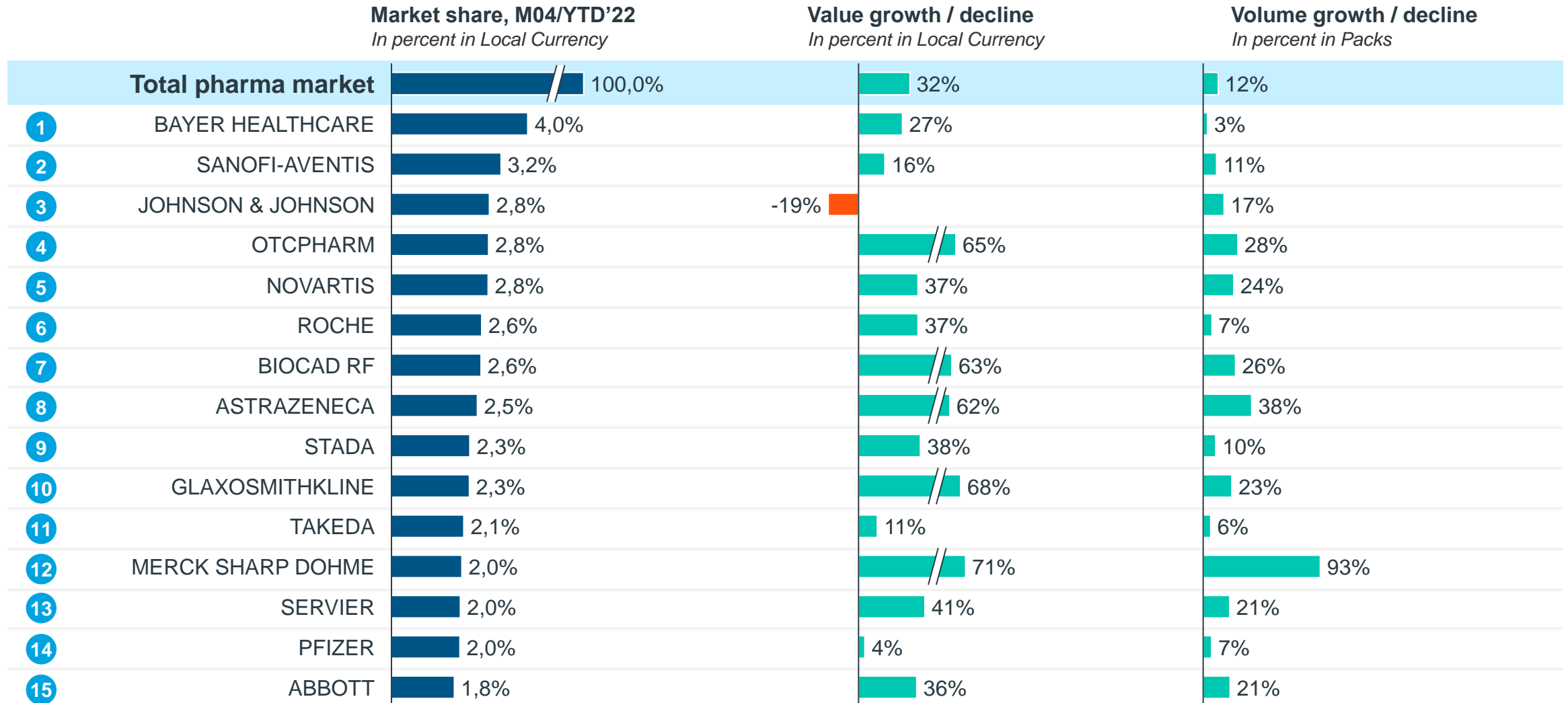


Sell-In vs Sell-Out, OTC registered drugs



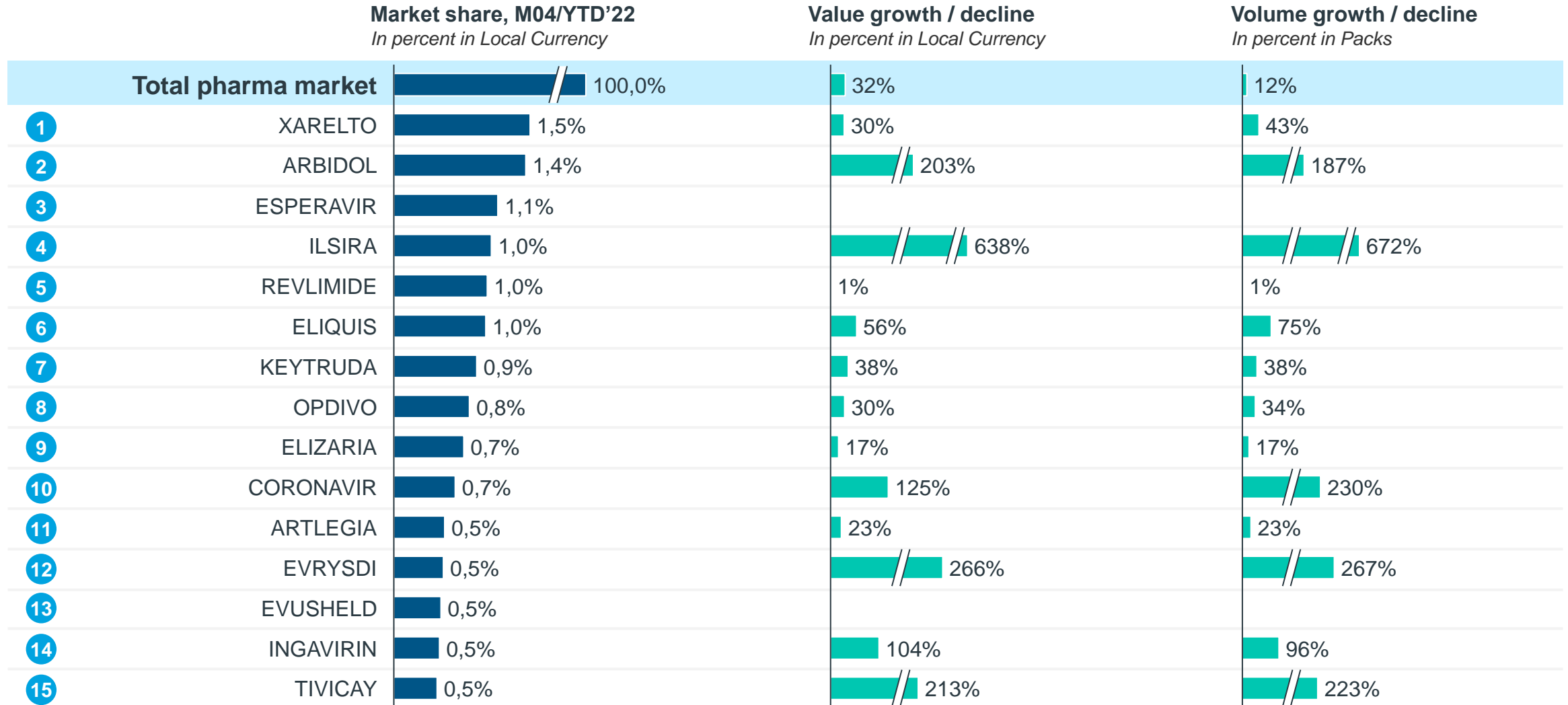


TOP-15 corporations on Russian market, April 2022

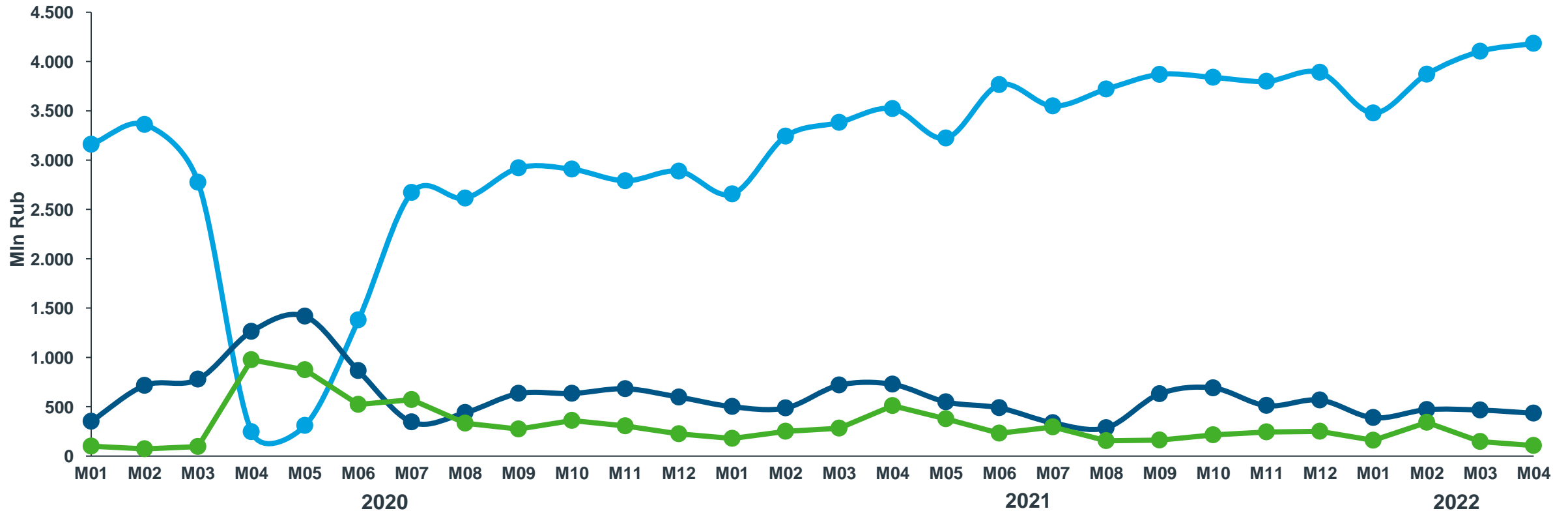




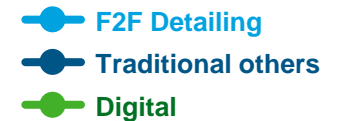
TOP-15 brands on Russian market, April 2022



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

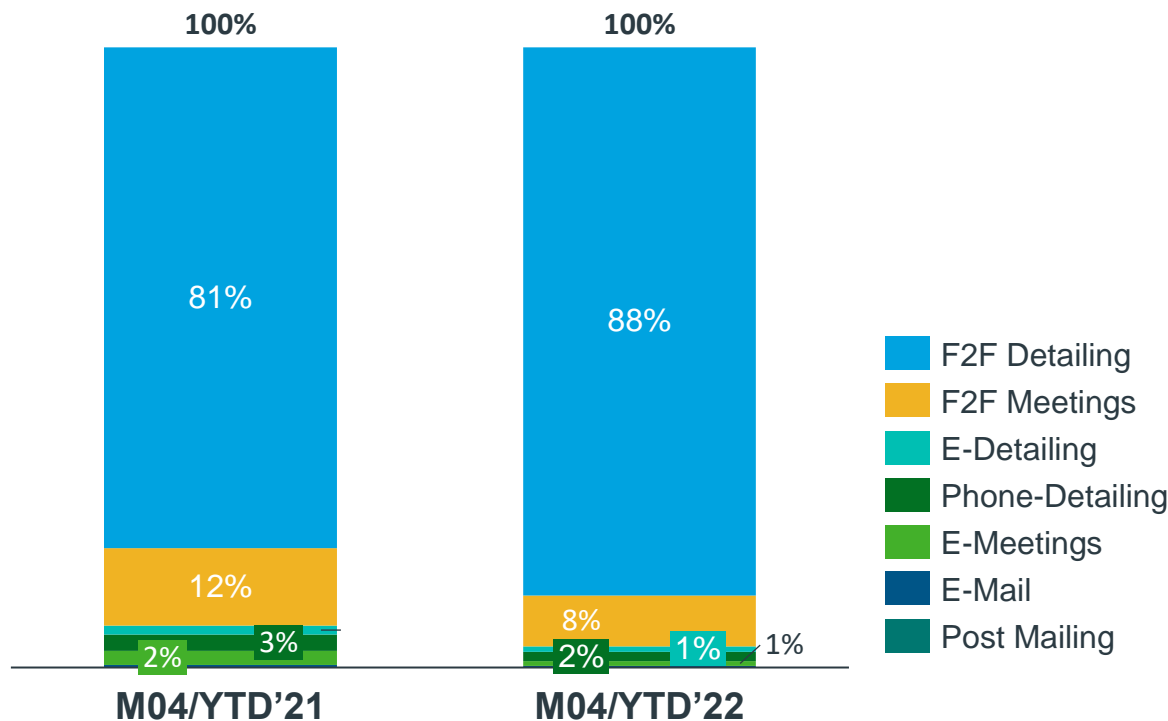


Value – a cost of each interaction projected on doctor’s universe

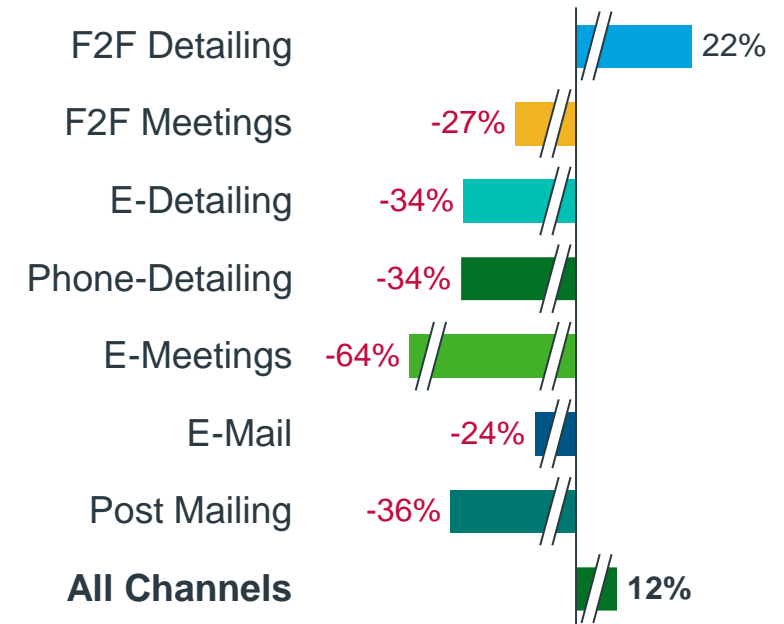
Total Market overall promotional value in Rub increased by 12%, YTD April 2022 vs 2021



Promotional value in Rub share by channel



% Changes in promotional value in Rub by channel YTD April 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

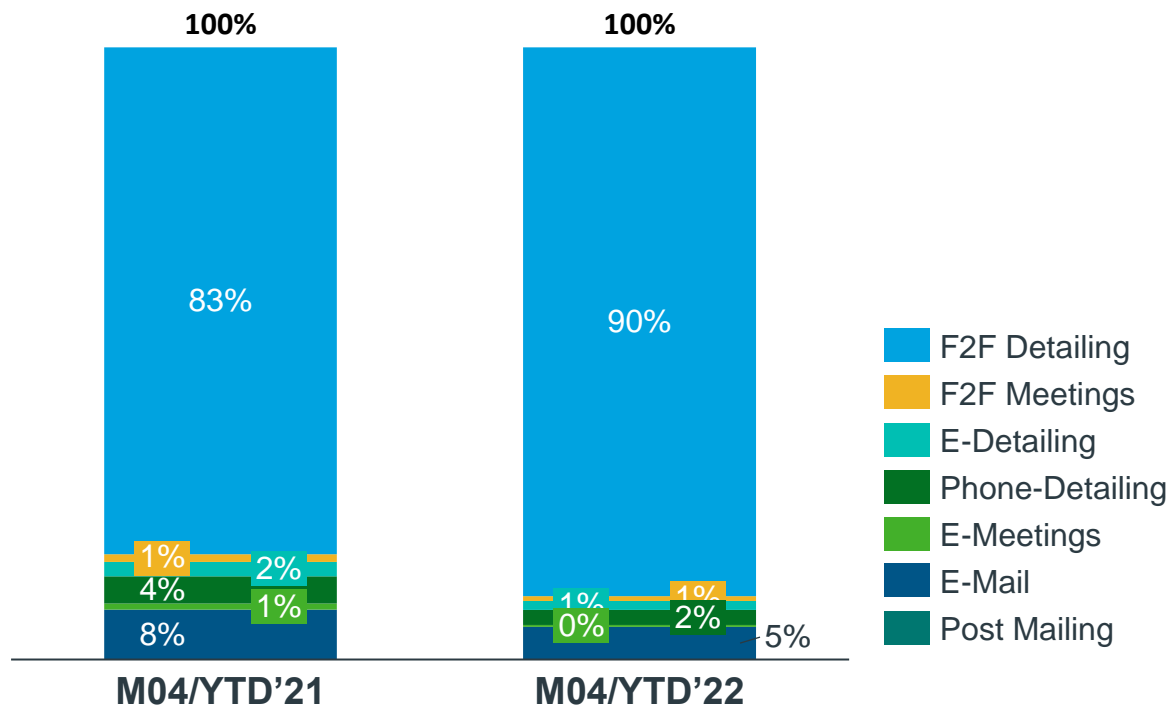
Value – a cost of each interaction projected on doctor's universe

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.

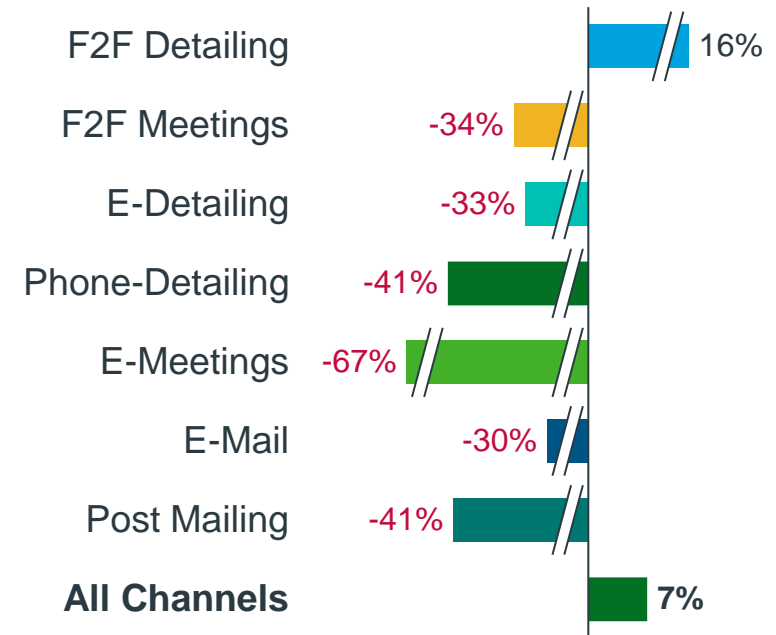
Total Market overall promotional volume (contacts) increased by 7%, YTD April 2022 vs 2021



Promotional value in Rub share by channel



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



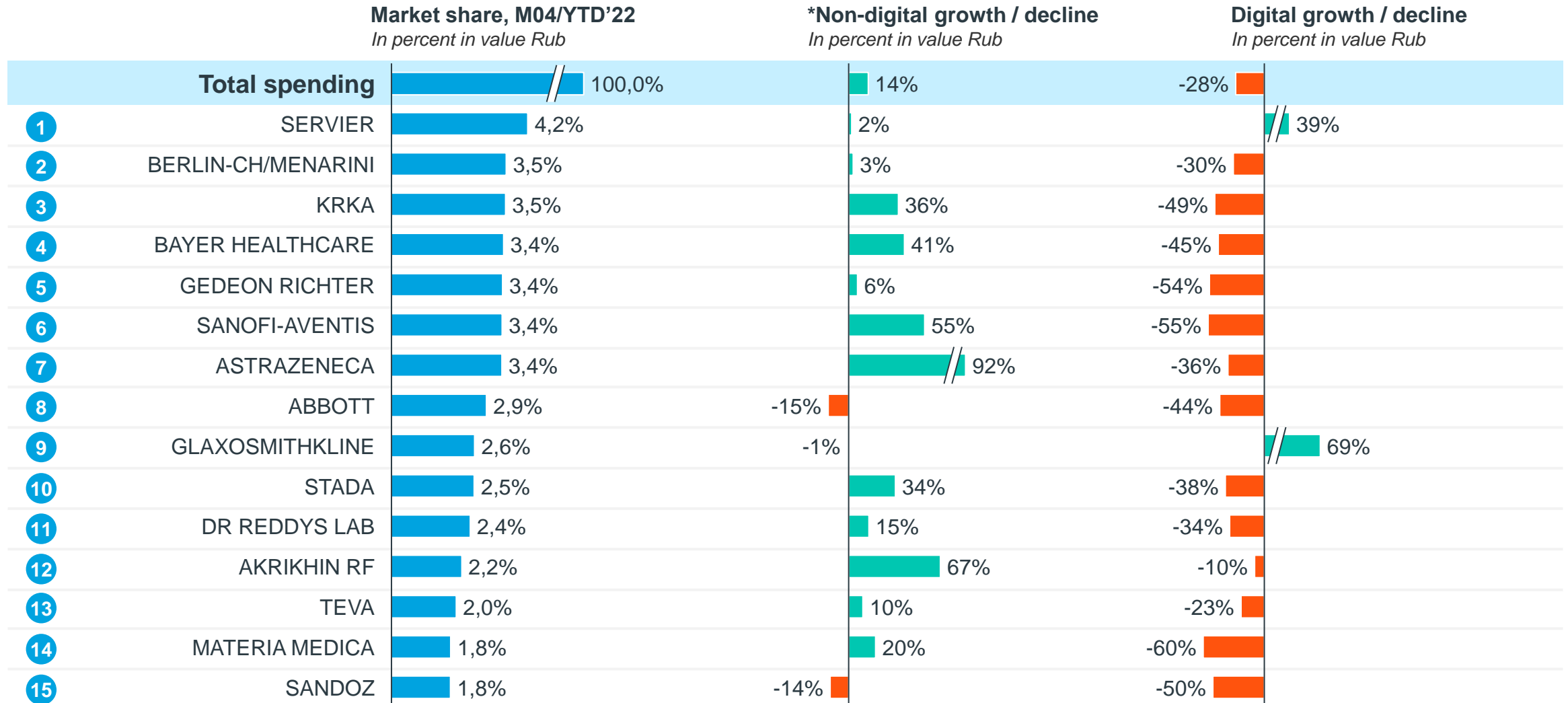
F2F Detailing – Reps visits. **Traditional others:** 1) F2F meetings – group meetings, round tables etc, 2) Phone Detailing – phone calls, 3) E-mail – communication via email. 4) Post Mailing – paper mails. **Digital:** 1) E-detailing – 1-1 calls visits using digitabl platforms 2) E-meetings – group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

Rating of Russian pharmacy chains

1Q 2022



TOP-10 pharmacy chains and pharmacy associations by sales of drugs (excluding reimbursement drugs supply) 1Q 2022

#	Category*	Regions	Pharmacy Chain / Pharmacy Association	Number of stores (1 Apr 2022)	Market share of pharmacy chain on the retail market, drugs only, 1Q 2022, %	Change in drug sales 1Q 2022 vs. 1Q 2021, %	The indicator of the relative sales of drugs, 1Q 2022 (relative to the leading audited company)	Average check, rub.	The rank of gross sales 1Q 2022 (relative to the leading audited company)
1	Fed.	80	ASNA	16 786	8,72%	7,9%	-	386	-
2	Fed.	58	Rigla ¹	3 468	6,88%	43,7%	1,000	747	1
3	Fed.	59	April	3 438	5,34%	68,4%	0,775	676	2
5	Fed.	27	Iris ²	3 000	5,15%	39,9%	0,748	-	4
4	Fed.	50	United Pharmacy Chain Erkafarm and Melodiya zdorov'ya ³	1 849	4,85%	-7,6%	0,705	-	3
6	Fed.	14	Neo-Farm	1 011	4,03%	53,7%	0,585	-	5
7	Fed.	38	Vita (Samara)	2 172	3,21%	44,0%	0,467	-	6
8	Fed.	10	Farmland	1 588	2,64%	40,0%	0,384	695	7
9	Fed.	10	Aloe (BCC Holding)	474	1,16%	124,4%	0,169	-	9
10	Reg.	2	Gubernskie Apteki	377	1,05%	45,7%	0,153	1 341	8
Total:				34 163	43,0%	46,0%			

*Fed. = federal, Intr. = interregional, Reg. = regional

¹ Including OZ, Zhivika and DOMfarma

² Including Fakmakopeyka, Farmakopeyka 24, Khelmi, Tvoy doktor, Zdes' apteka, Farmani, Aptechestvo, Stavropol'skiye gorodskiy apteki, Farmaimpex, Novaya apteka and Minitsen

³ Including Doktor Stoletov, Ozerki, Raduga, Pervaya pomoshch', Ladushka, Khoroshaya apteka, Vashe zdorov'ye, Farmvolga, Narodnaya apteka, Novaya apteka, MosApteka, Ozerki u doma, Melodiya zdorov'ya

Source: based on data from pharmacy chains and pharmacy associations participating in the rating

© 2022 IQVIA - Rating of Russian Pharmacy Chains 1Q 2022

TOP-10 pharmacy chains by gross sales (excluding reimbursement drugs supply) 1Q 2022

#	Pharmacy Chain	The indicator of the relative gross sales of drugs, 1Q 2022	Change in gross sales 1Q 2022 vs. 1Q 2021, %
1	Rigla ¹	1,000	40,2%
2	April	0,775	88,2%
3	United Pharmacy Chain Erkafarm and Melodiya zdorov'ya ²	0,649	8,4%
4	Neo-farm	0,549	50,2%
5	Vita (Samara)	0,452	41,5%
6	Farmland	0,383	38,4%
7	Gubernskiye Apteki	0,143	44,3%
8	Aloe (BCC Holding)	0,133	124,4%
9	Monastyrev	0,084	52,9%
10	Vasha №1	0,053	63,0%

¹ Including OZ, Zhivika and DOMfarma

² Including Doktor Stoletov, Ozerki, Raduga, Pervaya pomoshch', Ladushka, Khoroshaya apteka, Vashe zdorov'ye, Farmvolga, Narodnaya apteka, Novaya apteka, MosApteka, Ozerki u doma, Melodiya zdorov'ya

Source: based on data from pharmacy chains and pharmacy associations participating in the rating

© 2022 IQVIA - Rating of Russian Pharmacy Chains 1Q 2022

TOP-6 pharmacy associations and service platforms by sales of drugs (excluding reimbursement drugs supply) 1Q 2022

#	Pharmacy Association / Service Platform	Head Office	Number of stores (1 Apr 2022)	Market share of pharmacy association on the retail market, drugs only, 1Q 2022, %	Change of drug sales 1Q 2022 vs. 1Q 2021, %	The indicator of the relative sales of drugs, 1Q 2022
1	ProApteka	Moscow	9 098	10,49%	46,5%	1,000
2	ASNA	Moscow	16 786	8,72%	7,9%	0,999
3	MFU ¹	St. Petersburg	6 428	7,00%	48,3%	0,741
4	Iris ²	Moscow	3 000	5,15%	39,9%	0,489
5	Sozvezdie	Moscow	5 007	4,53%	30,5%	0,550
6	VESNA ³	St. Petersburg	1 787	1,62%	39,5%	0,183

¹ MedPharm Unity

² Including Fakmakopeyka, Farmakopeyka 24, Khelmi, Tvoj doktor, Zdes' apteka, Farmani, Aptechestvo, Stavropol'skiye gorodskiye apteki, Farmaimpex, Novaya apteka and Minitsen

³ All-Russian United Commonwealth of Independent Drugstores

Source: based on data from pharmacy associations and service platform participating in the rating

© 2022 IQVIA - Rating of Russian Pharmacy Chains 1Q 2022



Rating of Russian distributors 1Q 2022



TOP-10 distributors on the market of gross sales, 1Q 2022

#	Distributor	Market share in gross sales, %		Change in gross sales 1Q 2022/1Q 2021, %
		1Q 2022	1Q 2021	
1	Pulse	13,2%	12,2%	49,6%
2	Katren	12.2%	11.7%	44.7%
3	Protek	12.0%	11.3%	47.0%
4	R-Pharm	9.0%	8.0%	54.3%
5	FK Grand Capital	5.2%	5.0%	45.4%
6	BSS	5.2%	3.5%	105.2%
7	Pharmkomplekt	3.6%	4.9%	3.1%
8	Irvin	2.7%	2.0%	88.4%
9	Profitmed	2.2%	2.7%	12.0%
10	Lancet	2.0%	1.8%	52.9%
Total		67,3%	63,1%	47,6%

*Asfadis – distributors association, includes Avikon, Accentmed, Alenpharma, ASTI, Asti plus, Lesan pharma, Donskoi Gospital.

Source: based on data from distributors participating in the rating



TOP-10 distributors on the budget market, 1Q 2022

#	Distributor	Distributor Type	Head Office	Relative volume of budget sales, 1Q 2022	Share of budget sales from the gross sales volume, %
1	R-Pharm	National	Moscow	1.000	69%
2	Pharmstandart**	National	Moscow	0.527	-
3	Irvin	Regional	Moscow	0.392	89%
4	BSS	National	Saint-Petersburg	0.352	42%
5	GDP	Interregional	Moscow	0.216	94%
6	Farmimex*	Interregional	Moscow	0.207	70%
7	Lancet	Interregional	Moscow	0.193	60%
8	Protek	National	Moscow	0.168	9%
9	Severo Zapad	Interregional	Saint-Petersburg	0.096	98%
10	Farmacevt	Interregional	Rostov-on-Don	0.049	46%

*Expert assessment

**Data based on analysis of IQVIA tender base

Source: IQVIA, based on data from distributors participating in the rating



TOP-10 distributors on the market of secondary sales, 1Q 2022

#	Distributor	Distributor Type	Head Office	Relative volume of secondary distribution, 1Q 2022	Share of secondary distribution sales from the gross sales volume, %
1	R-Pharm	National	Moscow	1.000	25%
2	Lancet	Interregional	Moscow	0.334	38%
3	Pharmkomplekt	National	N.Novgorod	0.324	20%
4	Protek	National	Moscow	0.294	6%
5	Profitmed	Interregional	Moscow	0.261	27%
6	Firma Euroservice	Interregional	Moscow	0.249	68%
7	Asfadis*	Interregional	Moscow	0.209	28%
8	Pulse	National	Moscow	0.172	3%
9	Farmacevt	Interregional	Rostov-on-Don	0.155	54%
10	BSS	National	Saint-Petersburg	0.114	5%

*Asfadis – distributors association, includes Avikon, Accentmed, Alenpharma, ASTI, Asti plus, Lesan pharma, Donskoi Gospital.

Source: based on data from distributors participating in the rating



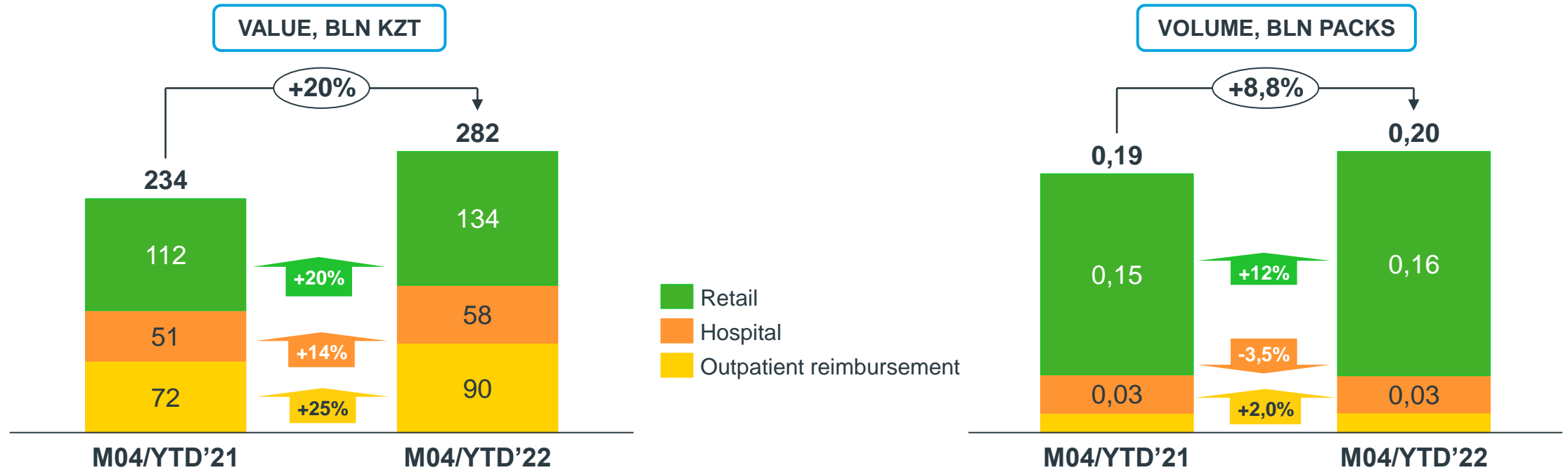
13,2%



INFLATION

Kazakhstan pharma market growth in April 2022

Market grew by 20% in value and 9% in volume

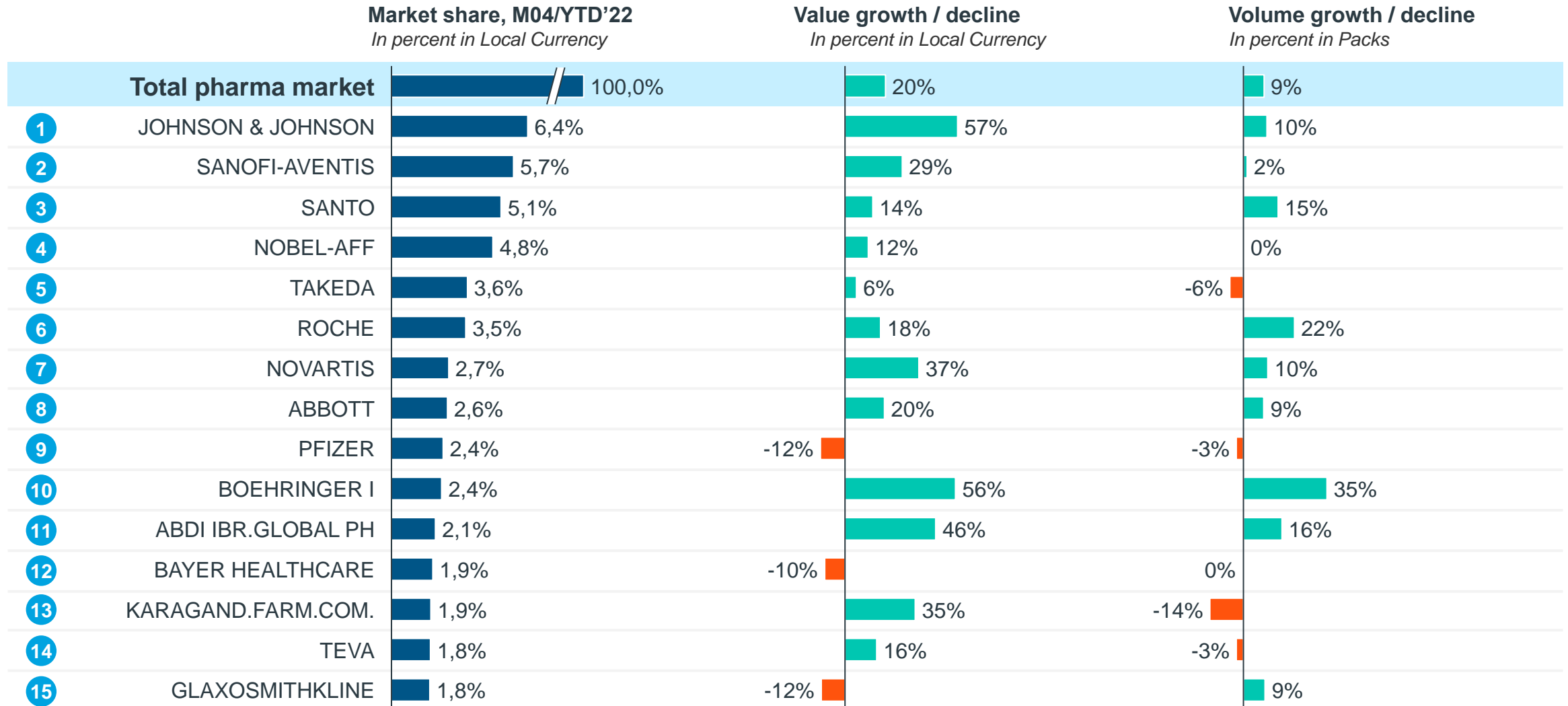


Indicator	KZT	USD	EUR	PACKS
Value M04/YTD'22, Bln.	282	0,62	0,56	0,20
Growth M04/YTD'22, %	▲ 20%	▲ 11%	▲ 20%	▲ 8,8%

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, April 2022





TOP-15 brands on Kazakhstan market, April 2022

		Market share, M04/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%	20%	9%
1	HEXAXIM	1,6%	1%	0%
2	PREVENAR	1,3%	-16%	37%
3	PENTAXIM	1,1%		
4	HERCEPTIN	1,1%	25%	22%
5	SIMPONI	1,0%	43%	43%
6	KEYTRUDA	1,0%	93%	96%
7	IMBRUVICA	1,0%	62%	60%
8	ELAPRASE	0,9%	-1%	-2%
9	STELARA	0,9%	236%	236%
10	IMMUNATE	0,8%	71%	0%
11	SPINRAZA	0,8%		
12	CORONIM	0,8%	12%	11%
13	VICTOZA	0,7%	85%	79%
14	REVOLADE	0,6%	106%	91%
15	METOJECT	0,6%	8%	2%



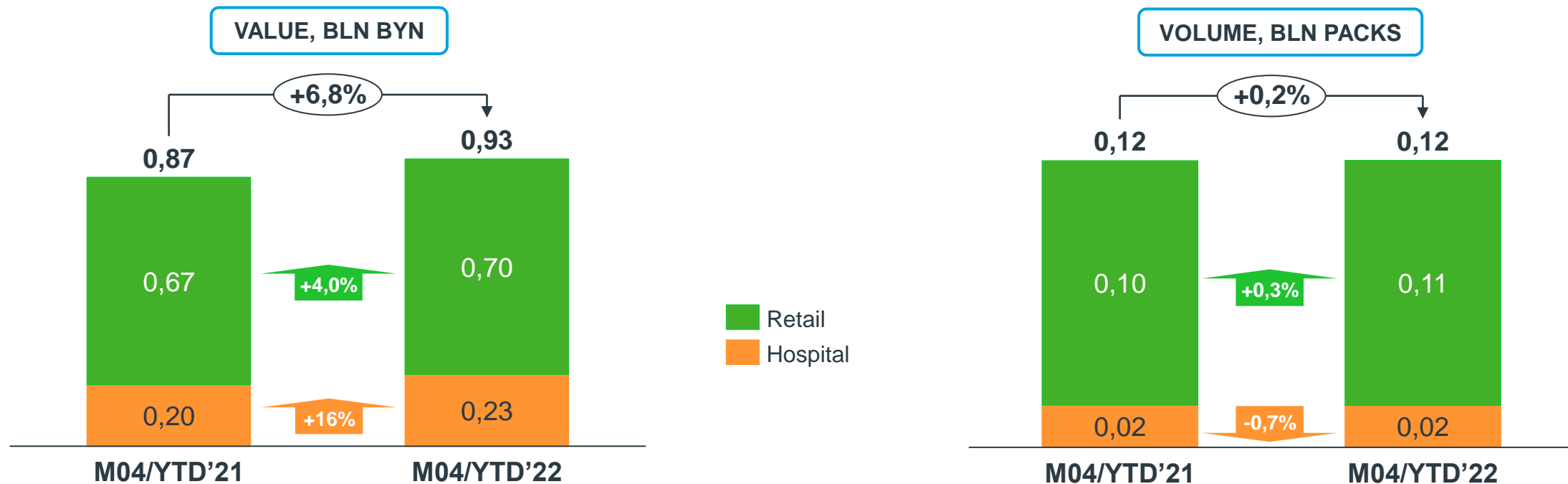
16,8%



INFLATION

Belarus pharma market growth in April 2022

Market grew by 7% in value and 0,2% in volume

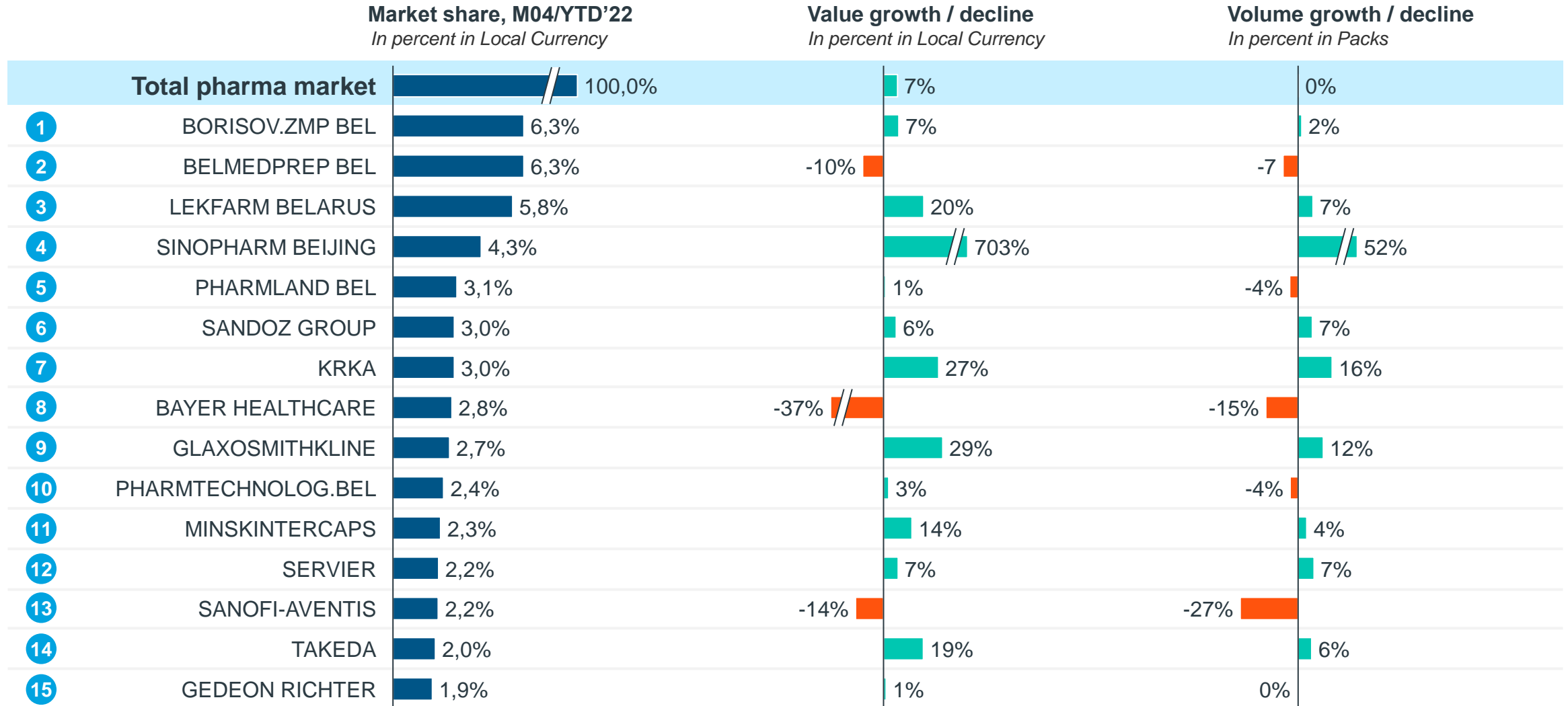


Indicator	BYN	USD	EUR	PACKS
Value M04/YTD'22, Bln.	0,93	0,33	0,30	0,12
Growth M04/YTD'22, %	▲ 6,8%	▼ -0,3%	▲ 7,4%	▲ 0,2%

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

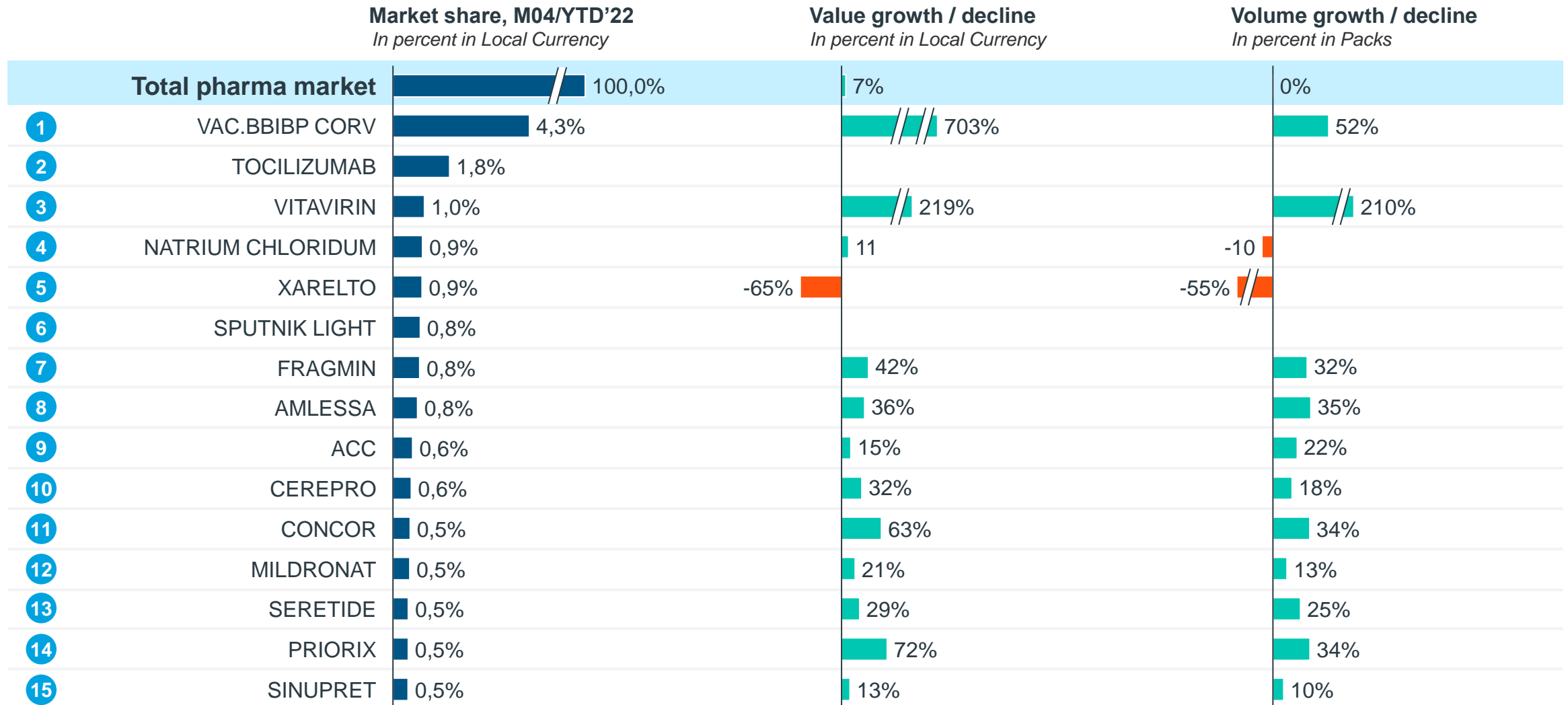


TOP-15 corporations on Belarus market, April 2022





TOP-15 brands on Belarus market, April 2022





10,38%



INFLATION

Uzbekistan pharma market growth in April 2022

Market grew by 3% in value and 8% in volume



Indicator	UZS	USD	EUR	PACKS
Value M04/YTD'22, Bln.	5 873	0,53	0,48	0,34
Growth M04/YTD'22, %	▲ 3,2%	▼ -1,6%	▲ 6,2%	▲ 8,3%



TOP-15 corporations on Uzbekistan market, April 2022

		Market share, M04/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%	3%	8%
1	KRKA	3,9%	11%	4%
2	NOVARTIS	2,9%	40%	18%
3	JURABEK LAB	2,8%	130%	138%
4	SERUM INSTIT.IND	2,6%	621%	545%
5	MENARINI	2,5%	13%	14%
6	GM PHARMACEUTICALS	2,3%	25%	11%
7	STADA	2,2%	34%	4%
8	WORLD MEDICINE	2,2%	-1%	0%
9	SANOFI-AVENTIS	2,0%	-25%	-29%
10	FARMAK KIEV	1,9%	-11%	-29%
11	ARTERIUM	1,9%	122%	166%
12	GEDEON RICHTER	1,8%	27%	35%
13	AVISON PHARM.	1,7%	-6%	-5%
14	YURIA-FARM UKR	1,6%	13%	15%
15	ABBOTT	1,6%	12%	3%

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, April 2022

		Market share, M04/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%	3%	8%
1	VACC.PNEUMOC.C.10V	2,4%	561%	77%
2	QUPEN	1,2%	45%	11%
3	ACC	0,9%	33%	27%
4	NATRIUM CHLORIDUM	0,9%	252%	122%
5	L-LYSINE AESCINATE	0,8%	112%	98%
6	VIFERON	0,7%	28%	39%
7	SEPTOLETE	0,7%	69%	60%
8	CEFTRIAXONE	0,7%	45%	85%
9	THERAFLU	0,7%	-16%	-15%
10	TIVORTIN	0,6%	-9%	-11%
11	AZIMAC	0,6%	1%	-9%
12	NIMESIL	0,6%	26%	25%
13	CALCIUM D3 NYCOMED	0,6%	123%	120%
14	URSOSAN	0,6%	285%	204%
15	AMLESSA	0,6%	19%	10%



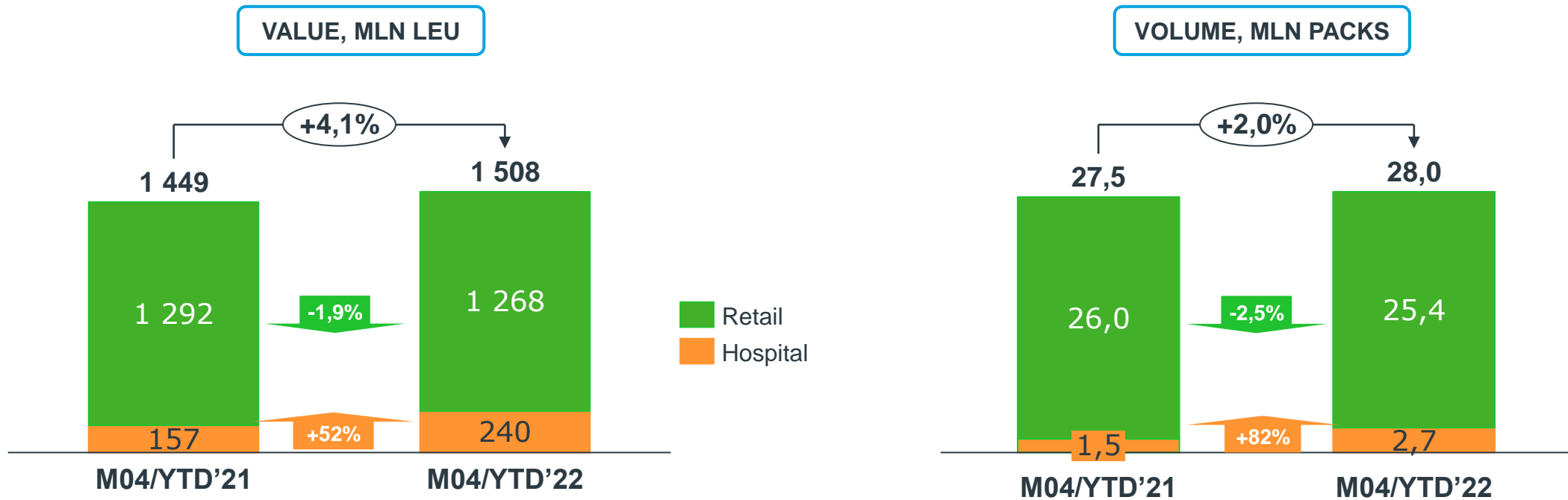
27,1%



INFLATION

Moldova pharma market growth in April 2022

Market grew by 4% in value and 2% in volume

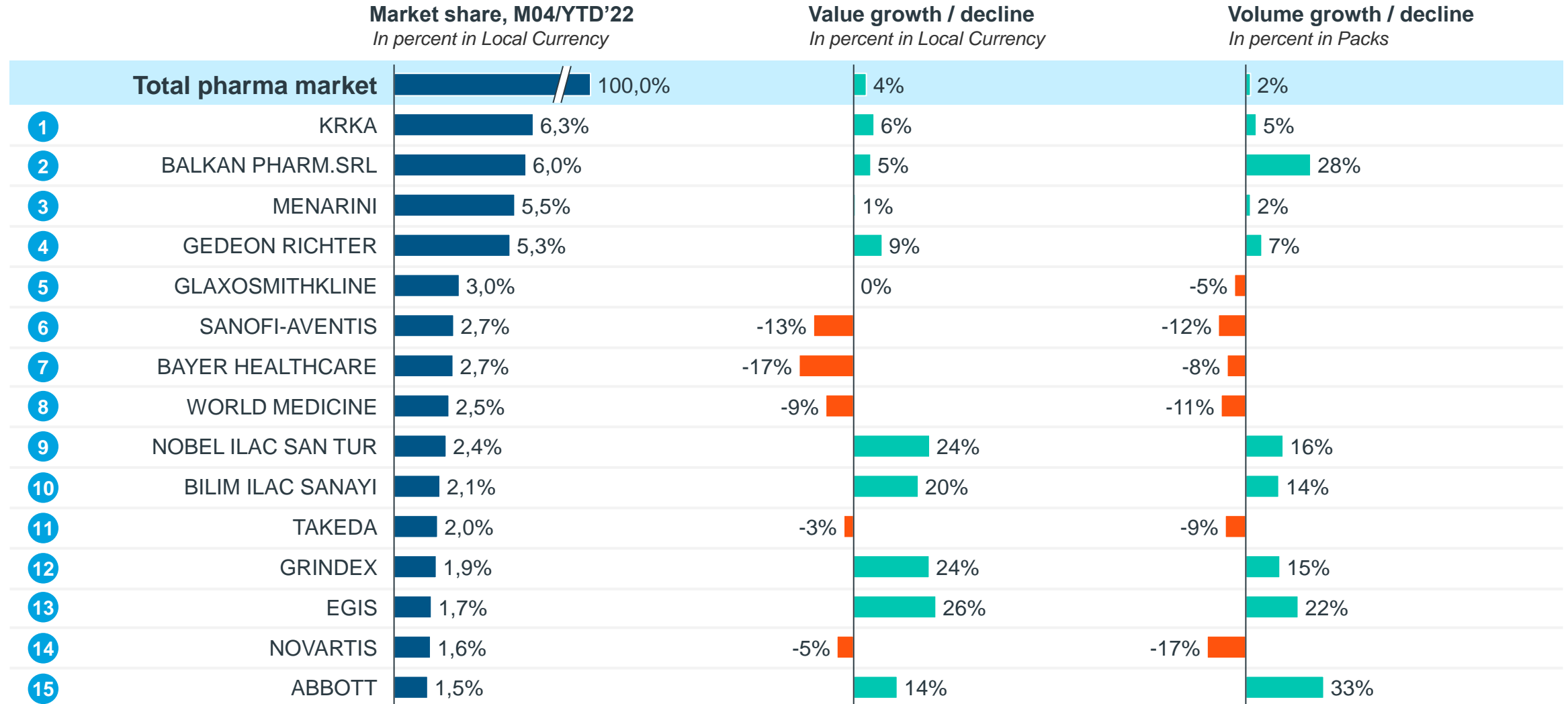


Indicator	LEU	USD	EUR	PACKS
Value M04/YTD'22, Mln.	1 508	83,0	74,5	28,0
Growth M04/YTD'22, %	▲ 4,1%	▲ 1,0%	▲ 8,9%	▲ 2,0%

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



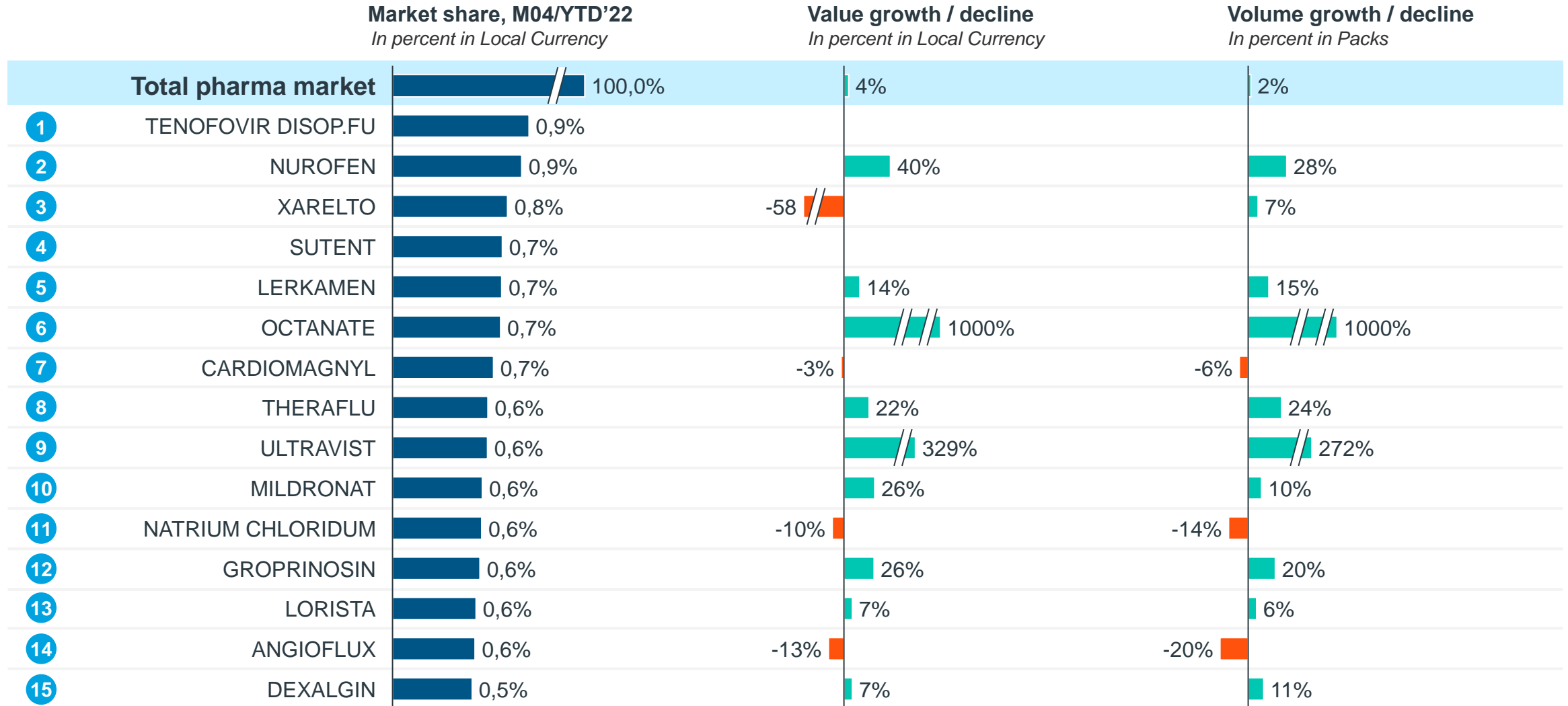
TOP-15 corporations on Moldova market, April 2022



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



TOP-15 brands on Moldova market, April 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