

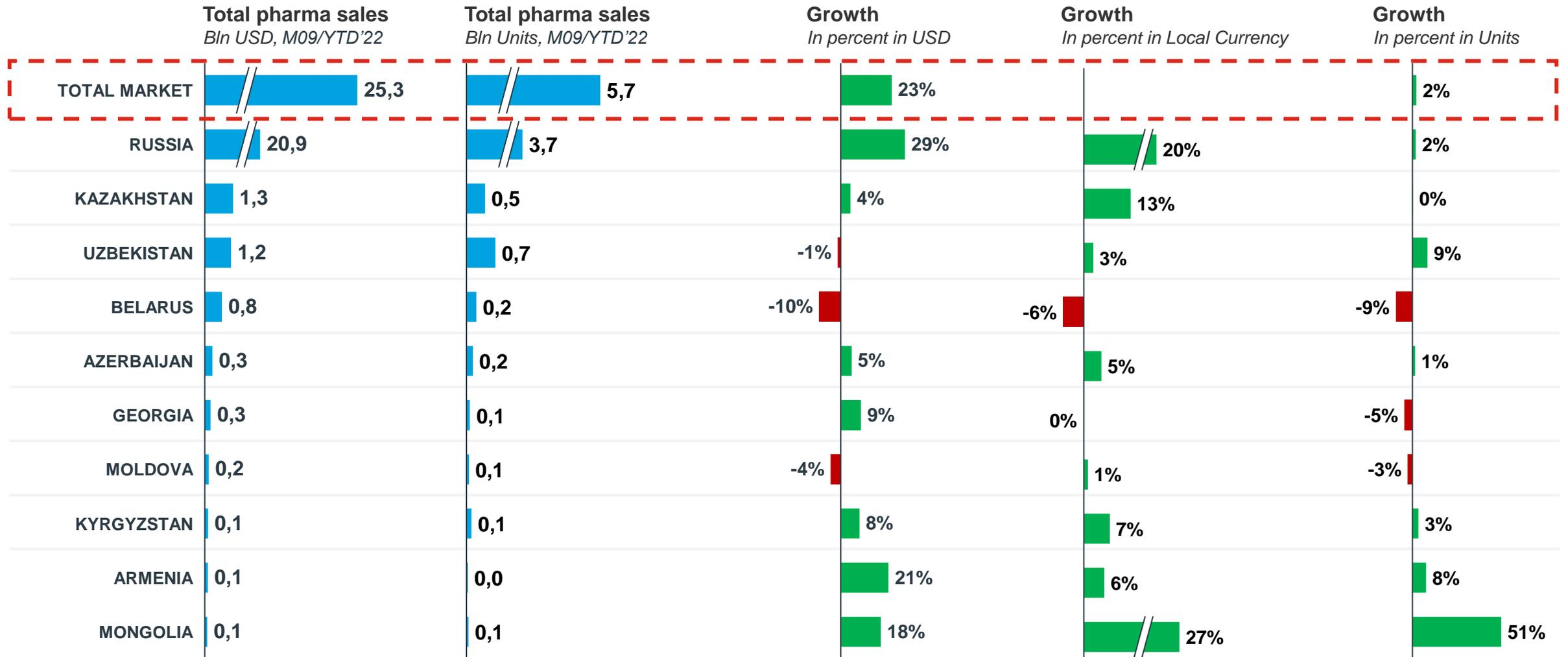


Facts from IQVIA

M09 2022

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

Total Market grew by 23% in USD and by 2% 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 September 2022

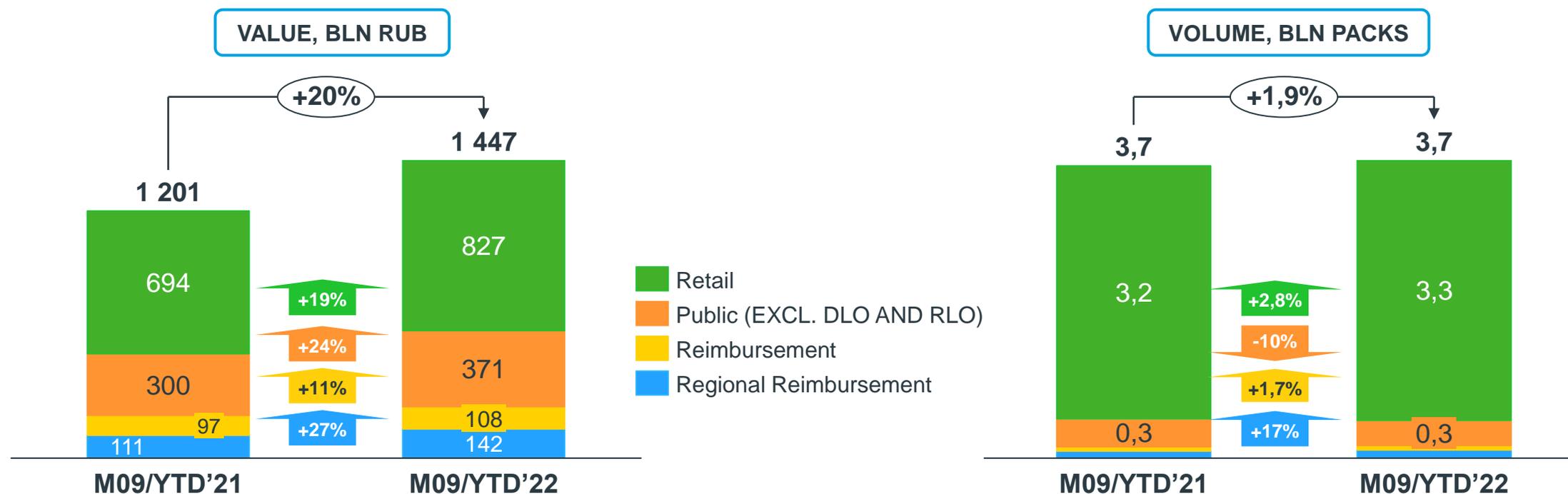
Market grew by 20% in value and 2% in volume



13,7%



INFLATION



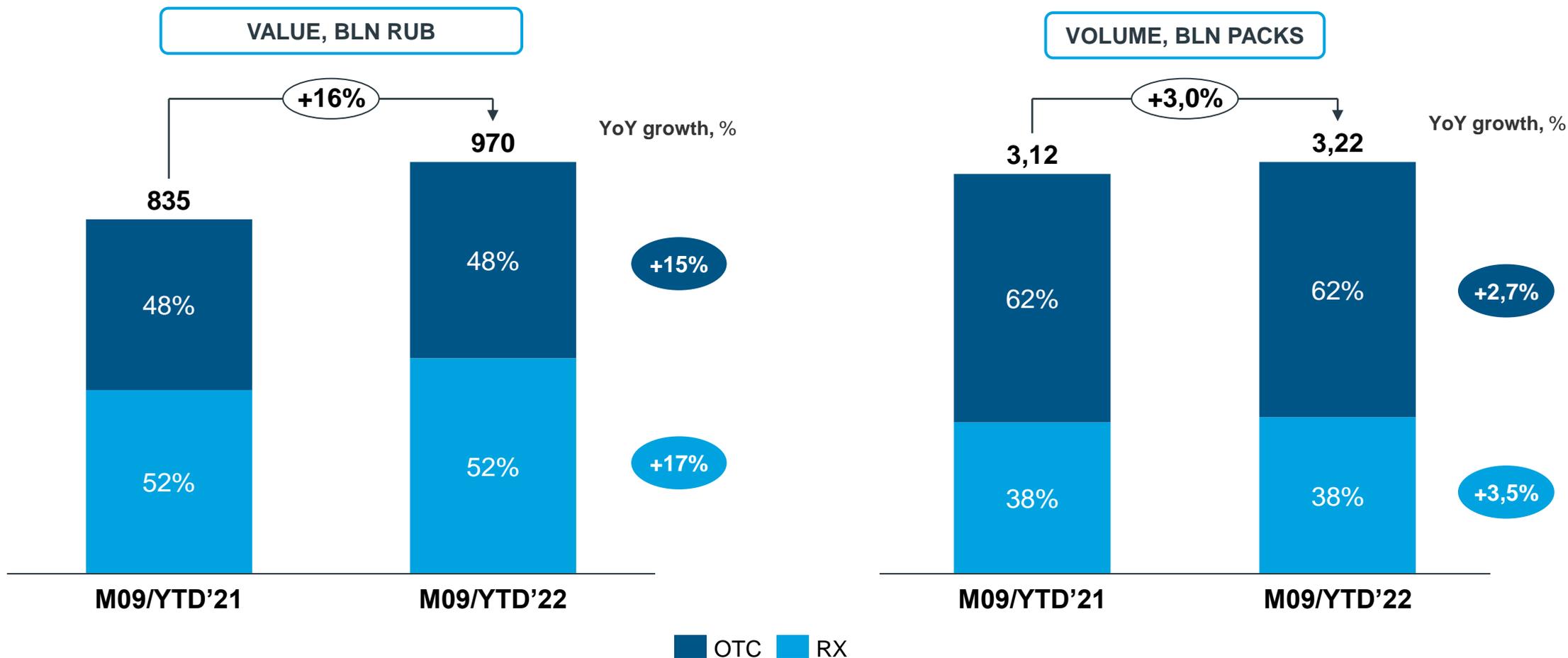
Indicator	RUB	USD	EUR	PACKS
Value M09/YTD'22, Bln.	1 447	20,9	19,8	3,7
Growth M09/YTD'22, %	▲ 20%	▲ 29%	▲ 46%	▲ 1,9%

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 September 2022



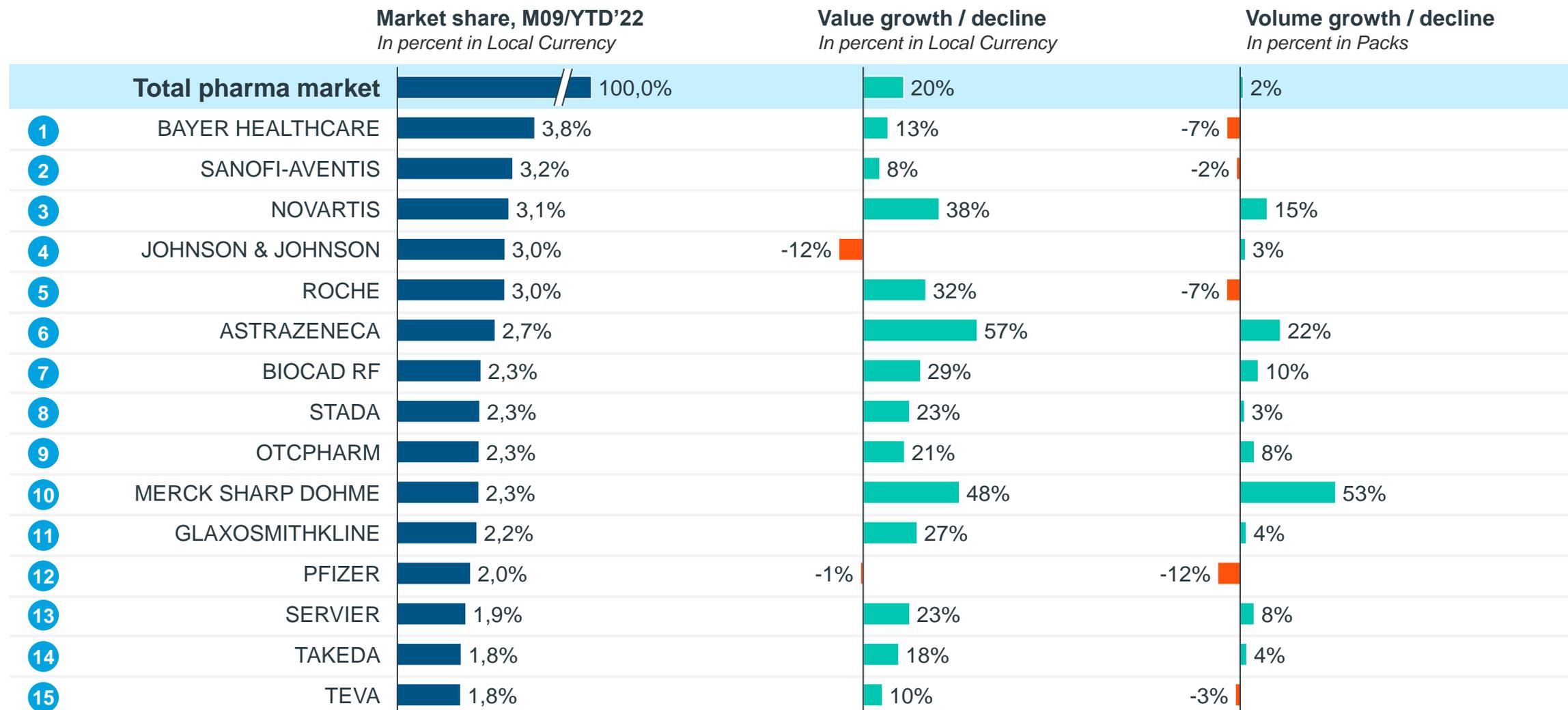
Retail Sell-Out: Market grew by 16% in value and 3% in volume



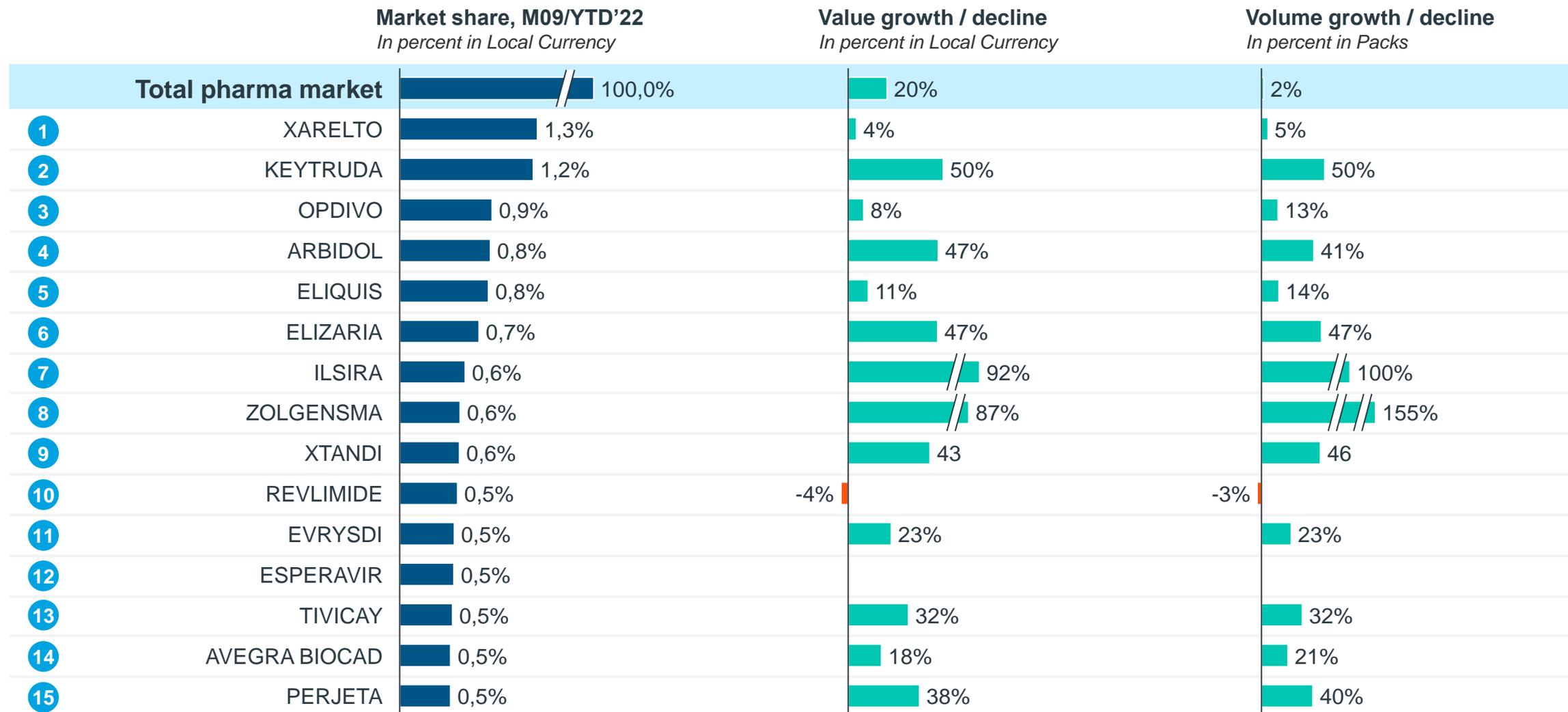
Sell-In vs Sell-Out, OTC registered drugs



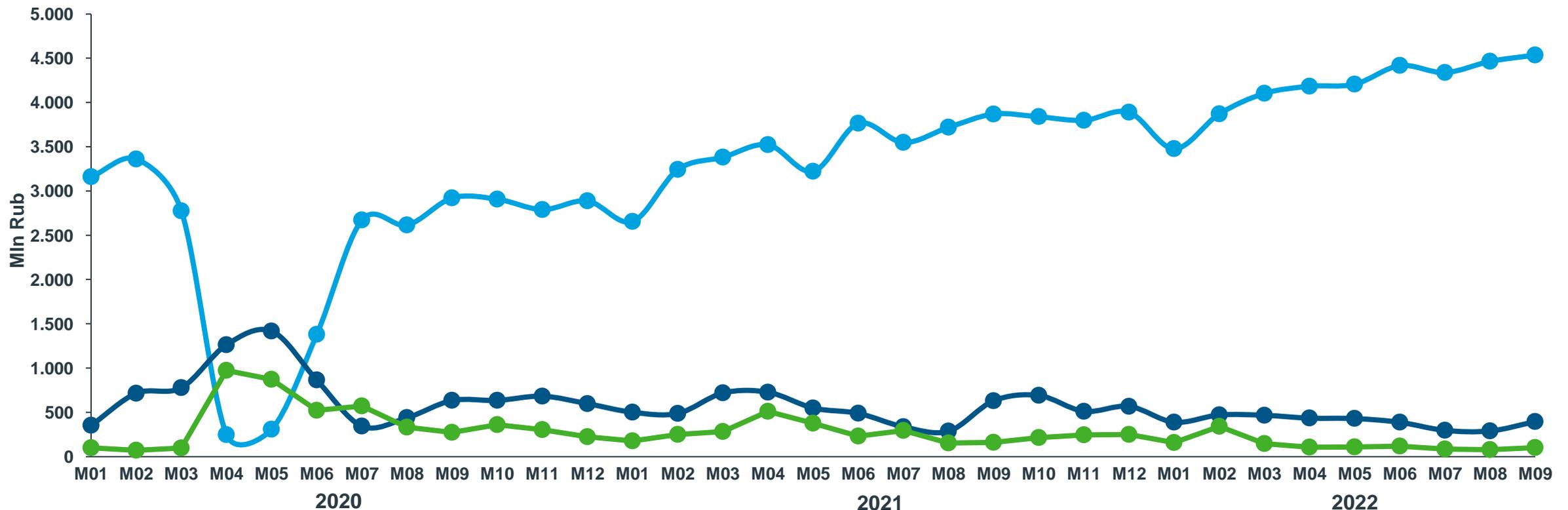
TOP-15 corporations on Russian market, September 2022



TOP-15 brands on Russian market, September 2022



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

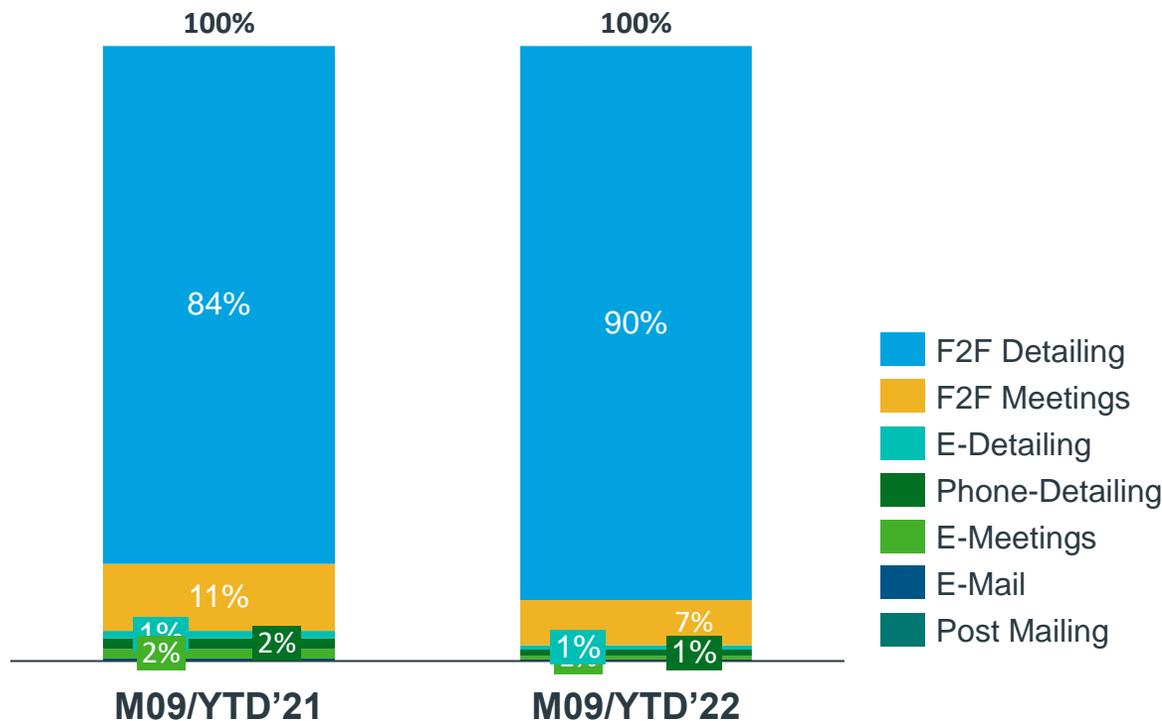
Source: IQVIA Russia, Channel Dynamics promo évaluation; Specialties: Allergology/Pulmonology, Cardiology, Dermatology, Diabetes, E.N.T., Gastroenterology, GPs, Gynecology, Neurology, Oncology, Pediatric, Pharma, Psychotherapy, Urology.



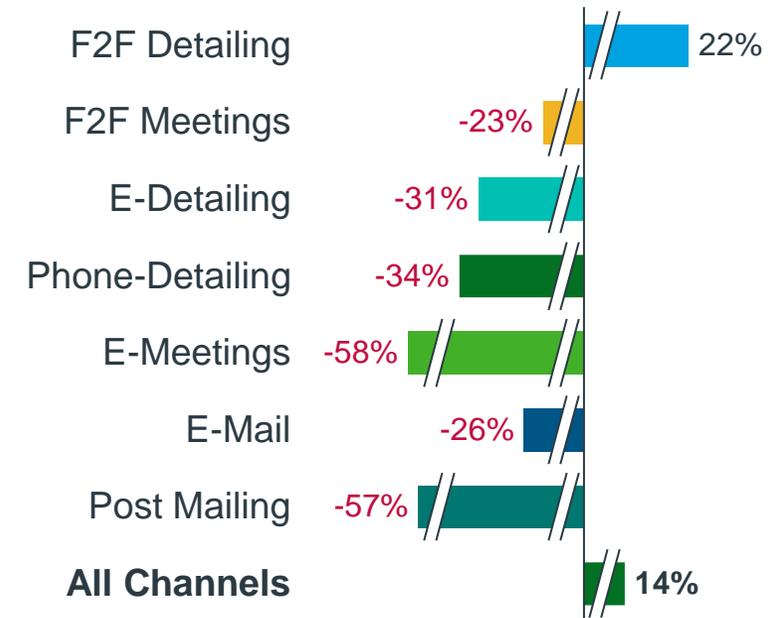
Total Market overall promotional value in Rub increased by 14%, YTD September 2022 vs 2021



Promotional value in Rub share by channel



% Changes in promotional value in Rub by channel YTD September 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

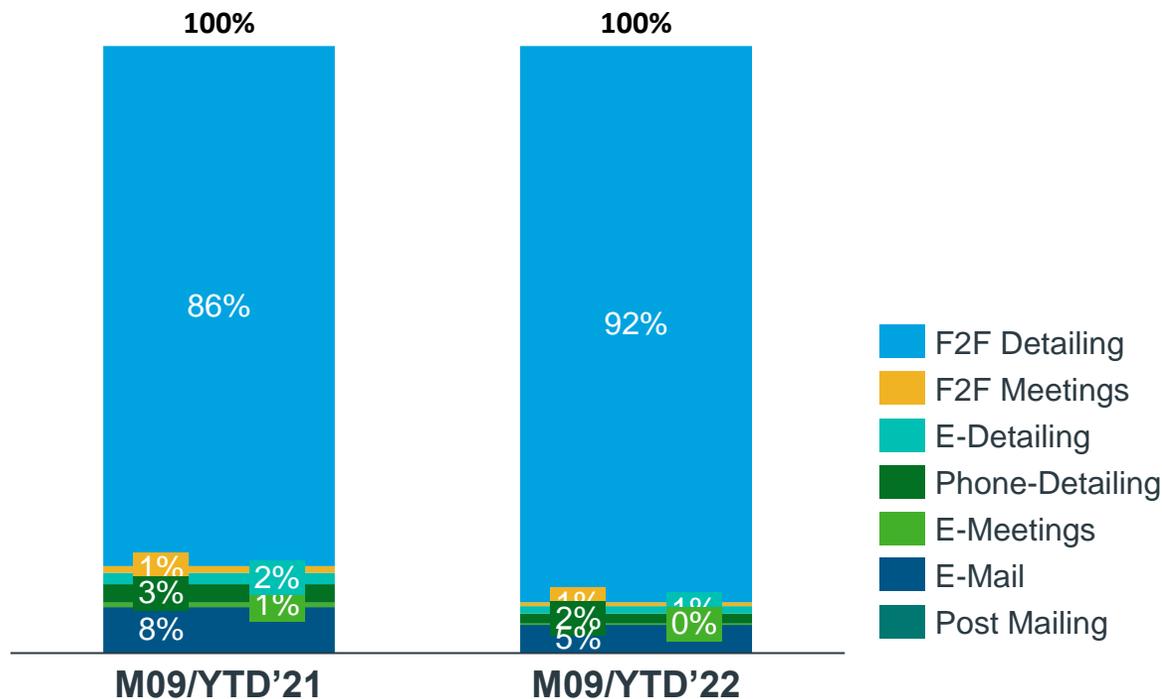
Value – a cost of each interaction projected on doctor's universe

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.

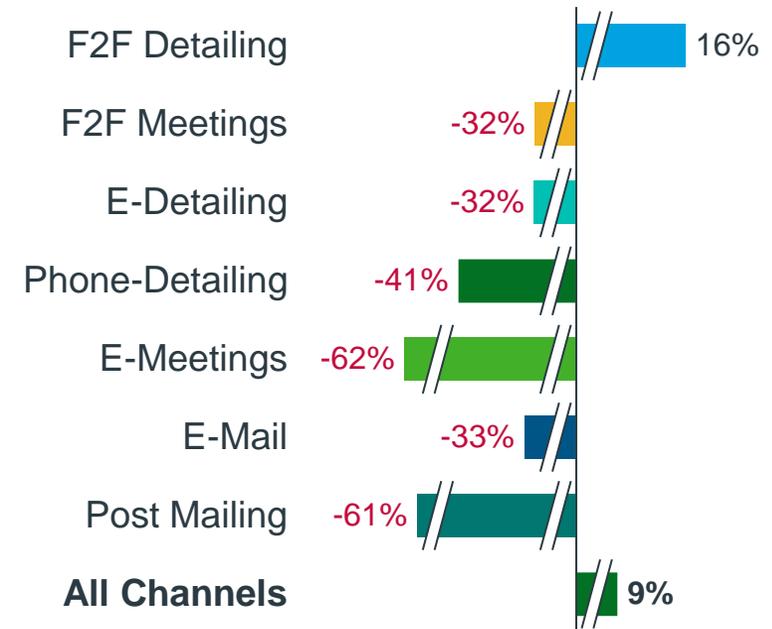
Total Market overall promotional volume (contacts) increased by 9%, YTD September 2022 vs 2021



Promotional value in Rub share by channel



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



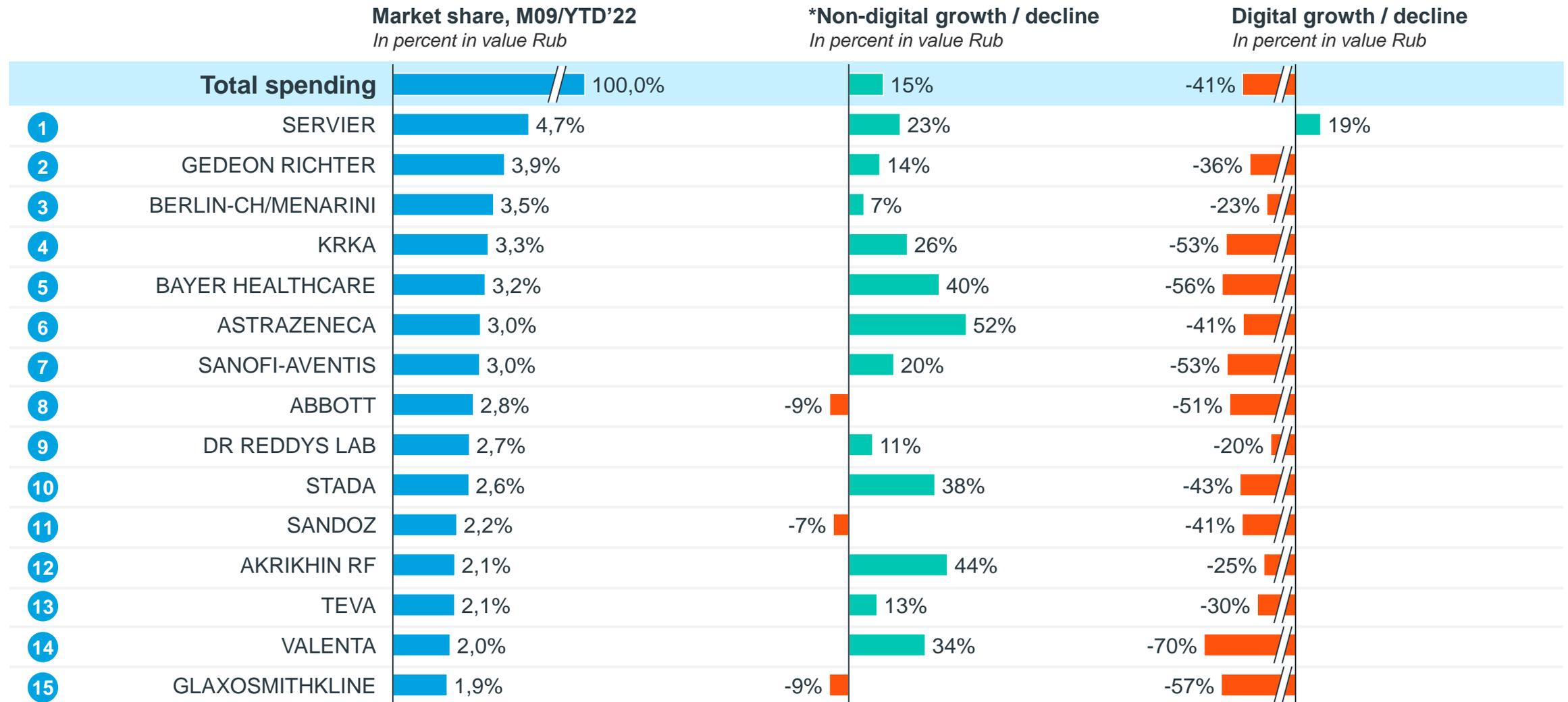
F2F Detailing – Reps visits. **Traditional others:** 1) F2F meetings – group meetings, round tables etc, 2) Phone Detailing – phone calls, 3) E-mail – communication via email. 4) Post Mailing – paper mails. **Digital:** 1) E-detailing – 1-1 calls visits using digitabl platforms 2) E-meetings – group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

TOP-10 distributors on the market of gross sales, 1-3Q 2022

#	Distributor	Market share in gross sales, %		Change in gross sales 1-3Q 2022 / 1-3Q 2021, %
		1-3Q 2022	1-3Q 2021	
1	Pulse	13,4%	13,9%	12,8%
2	Protek	12,5%	12,2%	19,7%
3	Katren	12,4%	12,8%	12,6%
4	R-Pharm	8,3%	9,2%	5,8%
5	FK Grand Capital	5,6%	5,4%	21,4%
6	BSS	4,6%	4,1%	31,9%
7	Pharmkomplekt	3,7%	5,4%	-21,1%
8	Profitmed	2,9%	3,0%	12,0%
9	Irvin	2,9%	2,4%	40,9%
10	Lancet	2,1%	1,9%	28,7%
Total		68,6%	70,2%	13,5%

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

Source: based on data from distributors participating in the rating

TOP-10 distributors on the budget market, 1-3Q 2022

#	Distributor	Distributor Type	Head Office	Relative volume of budget sales, 1-3Q 2022	Share of budget sales from the gross sales volume, %
1	R-Pharm	National	Moscow	1,000	61%
2	Pharmstandart**	National	Moscow	0,844	-
3	Irvin	Regional	Moscow	0,499	88%
4	BSS	National	Saint-Petersburg	0,405	44%
5	Farmimex*	Interregional	Moscow	0,327	75%
6	GDP	National	Moscow	0,287	95%
7	Lancet	National	Moscow	0,247	59%
8	Protek	Interregional	Moscow	0,237	10%
9	Severo-Zapad	Interregional	Saint-Petersburg	0,125	98%
10	Farmacevt	Interregional	Rostov-on-Don	0,106	63%

*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, 1-3Q 2022

#	Distributor	Distributor Type	Head Office	Relative volume of secondary distribution, 1-3Q 2022	Share of secondary distribution sales from the gross sales volume, %
1	R-Pharm	National	Moscow	1,000	31%
2	Lancet	Interregional	Moscow	0,313	38%
3	Profitmed	Interregional	Moscow	0,253	22%
4	Pharmkomplekt	National	N.Novgorod	0,243	17%
5	Asfadis	Interregional	Moscow	0,242	33%
6	Protek	National	Moscow	0,237	5%
7	Firma Euroservice	Interregional	Moscow	0,202	57%
8	Pulse	National	Moscow	0,167	3%
9	Pharmservis	Regional	Krasnodar	0,121	47%
10	Pharmacevt	Interregional	Rostov-on-Don	0,120	37%

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

Source: based on data from distributors participating in the rating

Rating of Russian pharmacy chains

1-3Q 2022



TOP-10 pharmacy chains and pharmacy associations by sales of drugs (excluding reimbursement drugs supply) 1-3Q 2022

#	Category	Regions	Pharmacy Chain / Pharmacy Association	Market share of pharmacy chain on the retail market, drugs only, 1-3Q 2022	Change in drug sales 1-3Q 2022 vs. 1-3Q 2021	Change in drug sales Like for Like 1-3Q 2022 vs. 1-3Q 2021	Number of stores (1 October 2022)	Change in number of stores 1-3Q 2022 vs. 1-3Q 2021
1	Fed.	84	ASNA (Moscow)	11,66%	12,8%	16,7%	17 866	19,0%
2	Fed.	58	Rigla (Moscow)	7,14%	21,0%	12,2%	3 575	6,8%
3	Fed.	60	Aprél' (Krasnodar)	5,94%	48,9%	18,0%	4 807	80,9%
4	Fed.	33	Iris (Moscow)	5,15%	20,8%	-	3 282	22,2%
5	Fed.	51	United Pharmacy Chain Erkafarm and Melodiya Zdorov'ya (Moscow)	4,70%	-23,0%	-	1 980	8,5%
6	Fed.	14	Neo-Farm (Moscow)	3,85%	22,1%	-	1 088	13,5%
7	Fed.	38	Vita (Samara)	3,26%	23,3%	10,1%	2 305	40,8%
8	Fed.	10	Farmlend (Ufa)	2,87%	23,0%	8,0%	1 815	22,6%
9	Fed.	34	Maksavit (Nizhniy Novgorod)	1,23%	15,9%	7,8%	828	16,3%
10	Fed.	10	Aloe (Saint-Petersburg)	1,15%	51,5%	-	518	75,6%
Total:				47,0%	15,8%	14,0%	38 064	24,3%

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

© 2022 IQVIA - Rating of Russian Pharmacy Chains 1-3Q 2022

TOP-10 pharmacy chains by gross sales (excluding reimbursement drugs supply) 1-3Q 2022

#	Pharmacy Chain	Gross sales share of pharmacy chain on the retail market, 1-3Q 2022	Change in gross sales 1-3Q 2022 vs. 1-3Q 2021	Change in gross sales Like for Like 1-3Q 2022 vs. 1-3Q 2021	Average check, 1-3Q 2022
1	Rigla (Moscow)	9,18%	19,5%	12,2%	710
2	Aprel' (Krasnodar)	7,74%	52,3%	18,0%	634
3	United Pharmacy Chain Erkafarm and Melodiya Zdorov'ya (Moscow)	5,59%	-8,4%	-	-
4	Neo-Farm (Moscow)	4,66%	21,4%	-	860
5	Vita (Samara)	4,09%	23,7%	10,3%	-
6	Farmlend (Ufa)	3,73%	24,2%	9,3%	658
7	Maksavit (Nizhniy Novgorod)	1,75%	15,6%	7,8%	685
8	Aloe (Saint-Petersburg)	1,15%	51,5%	-	-
9	Gubernskie Apteki (Krasnoyarsk)	1,11%	15,6%	-	1 071
10	Monastirev (Vladivostok)	0,75%	28,0%	14,1%	1 077

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

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TOP-6 pharmacy associations and service platforms by sales of drugs (excluding reimbursement drugs supply) 1-3Q 2022

#	Pharmacy Association / Service Platform	Market share of pharmacy association on the retail market, drugs only, 1-3Q 2022	Change in drug sales 1-3Q 2022 vs. 1-3Q 2021	Change in drug sales Like for Like 1-3Q 2022 vs. 1-3Q 2021	Number of stores (1 October 2022)	Average check, 1-3Q 2022
1	ProApteka (Moscow)	12,60%	41,5%	18,1%	9 450	503
2	ASNA (Moscow)	11,66%	12,8%	16,7%	17 866	630
3	MFO (Saint-Petersburg)	8,23%	56,1%	19,1%	7 470	-
4	Iris (Moscow)	5,15%	20,8%	-	3 282	-
5	Sozvezdie (Moscow)	4,97%	7,5%	-	6 040	527
6	VESNA (Saint-Petersburg)	1,46%	19,3%	-	1 960	-

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

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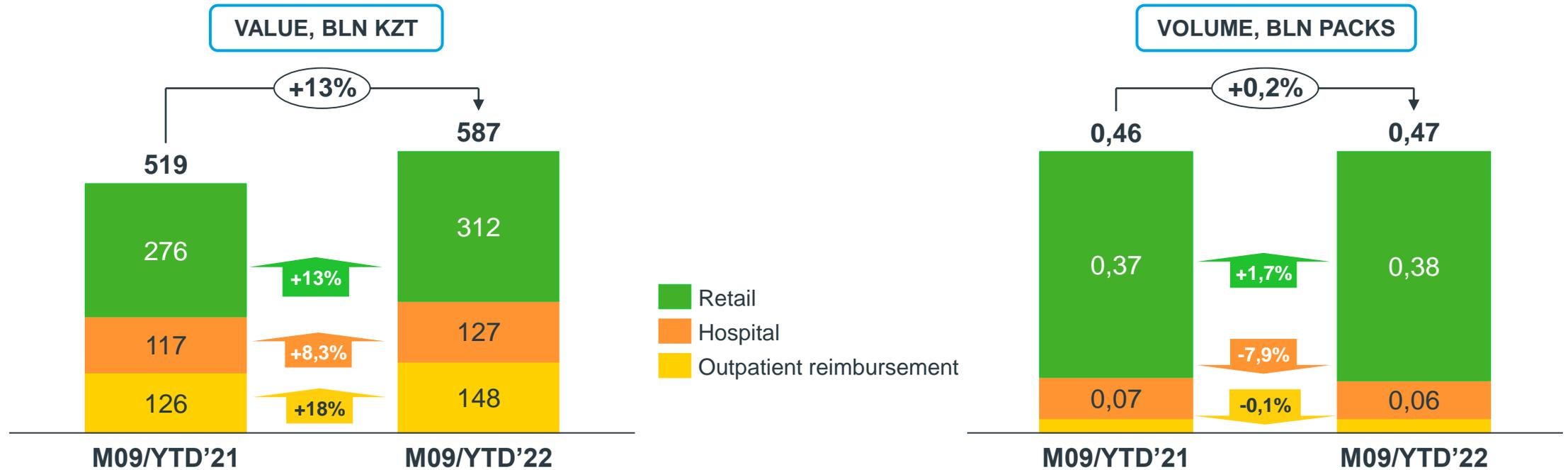
Kazakhstan pharma market growth in September 2022

Market grew by 13% in value and 0,2% in volume

17,7%



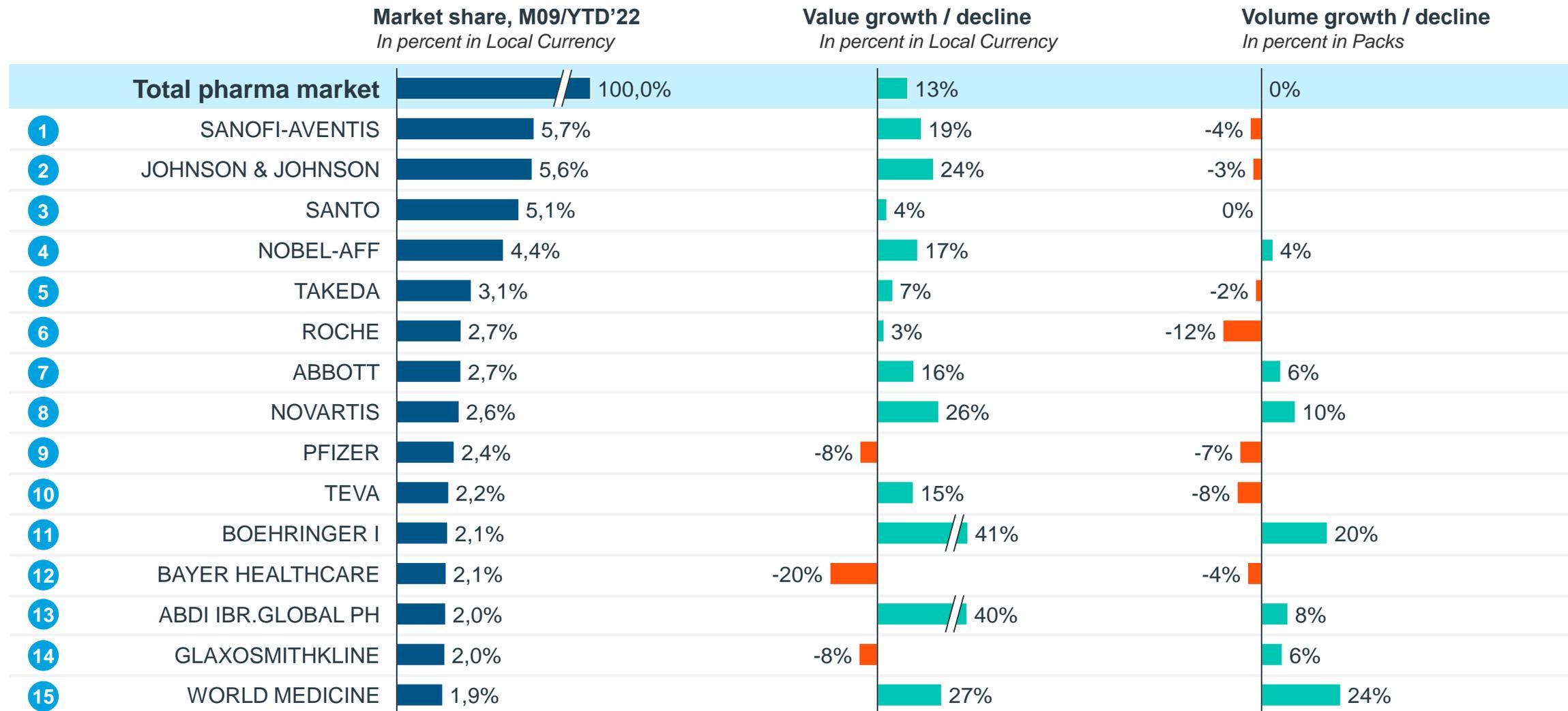
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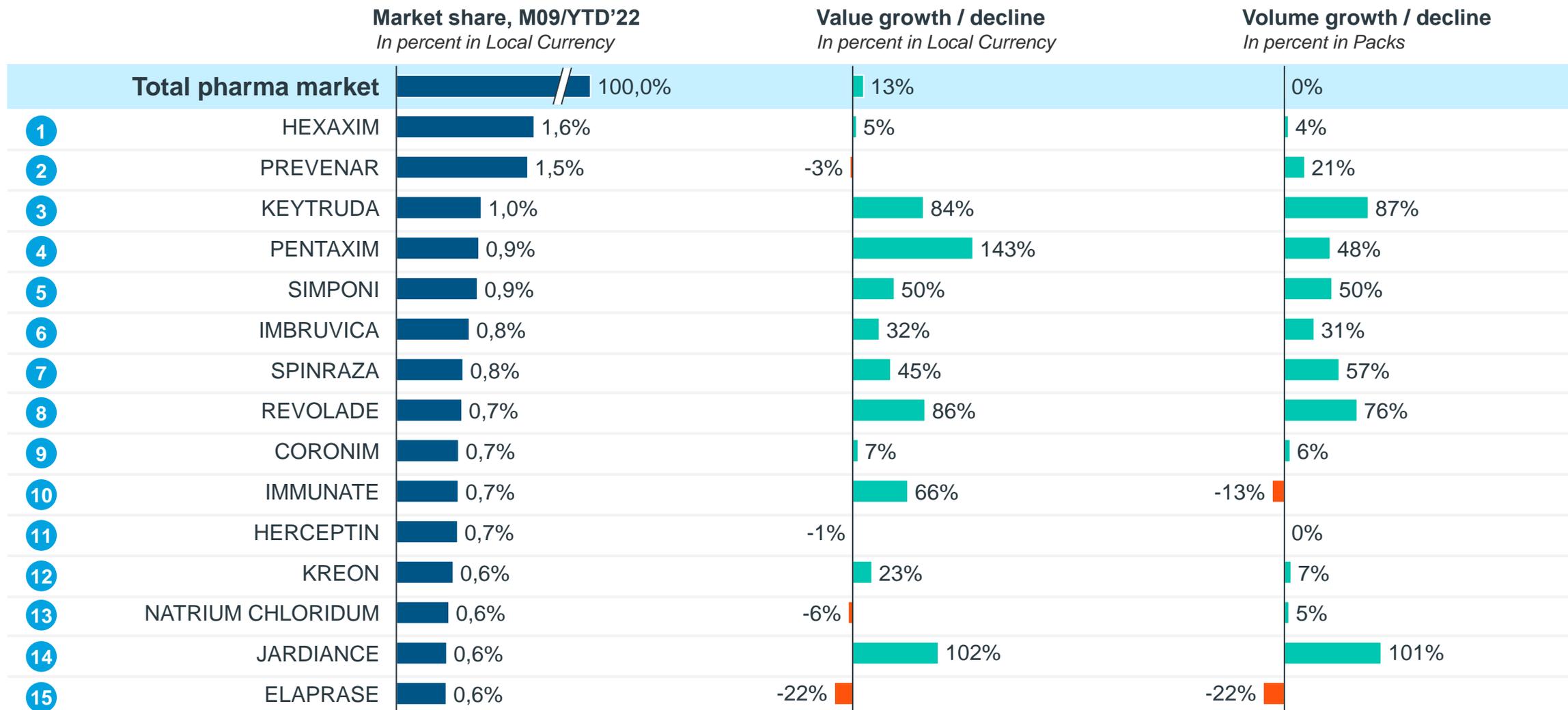
Indicator	KZT	USD	EUR	PACKS
Value M09/YTD'22, Bln.	587	1,28	1,20	0,47
Growth M09/YTD'22, %	▲ 13%	▲ 4,4%	▲ 17%	▲ 0,2%

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, September 2022



TOP-15 brands on Kazakhstan market, September 2022



Belarus pharma market decrease in September 2022

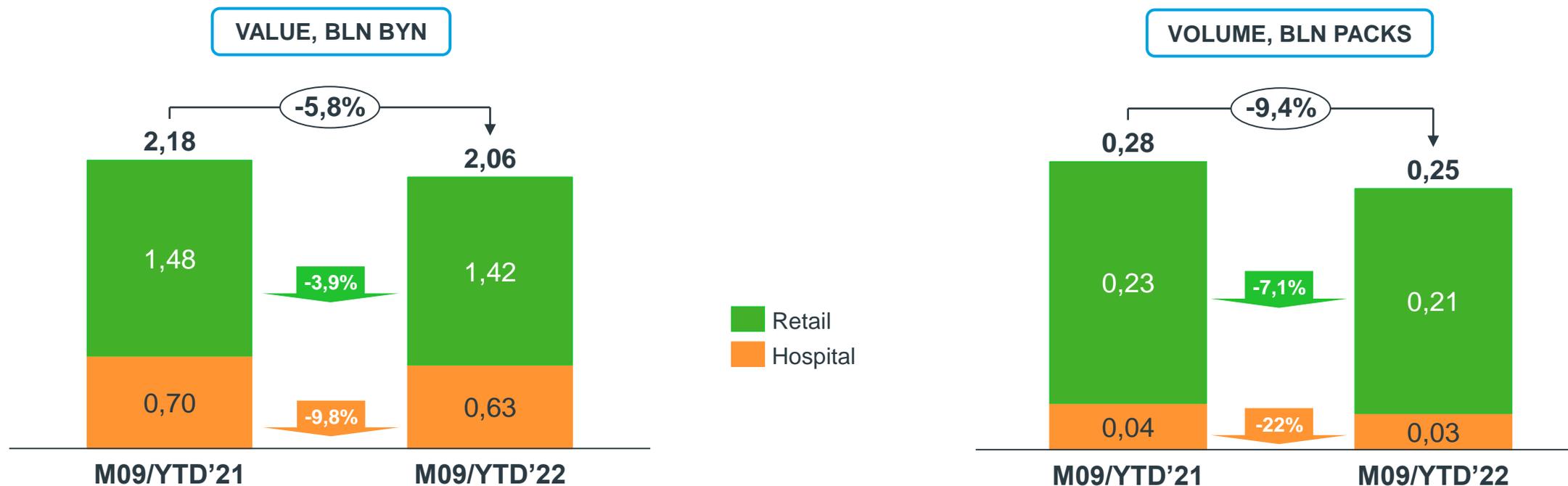
Market dropped by -6% in value and by -9% in volume



17,4%

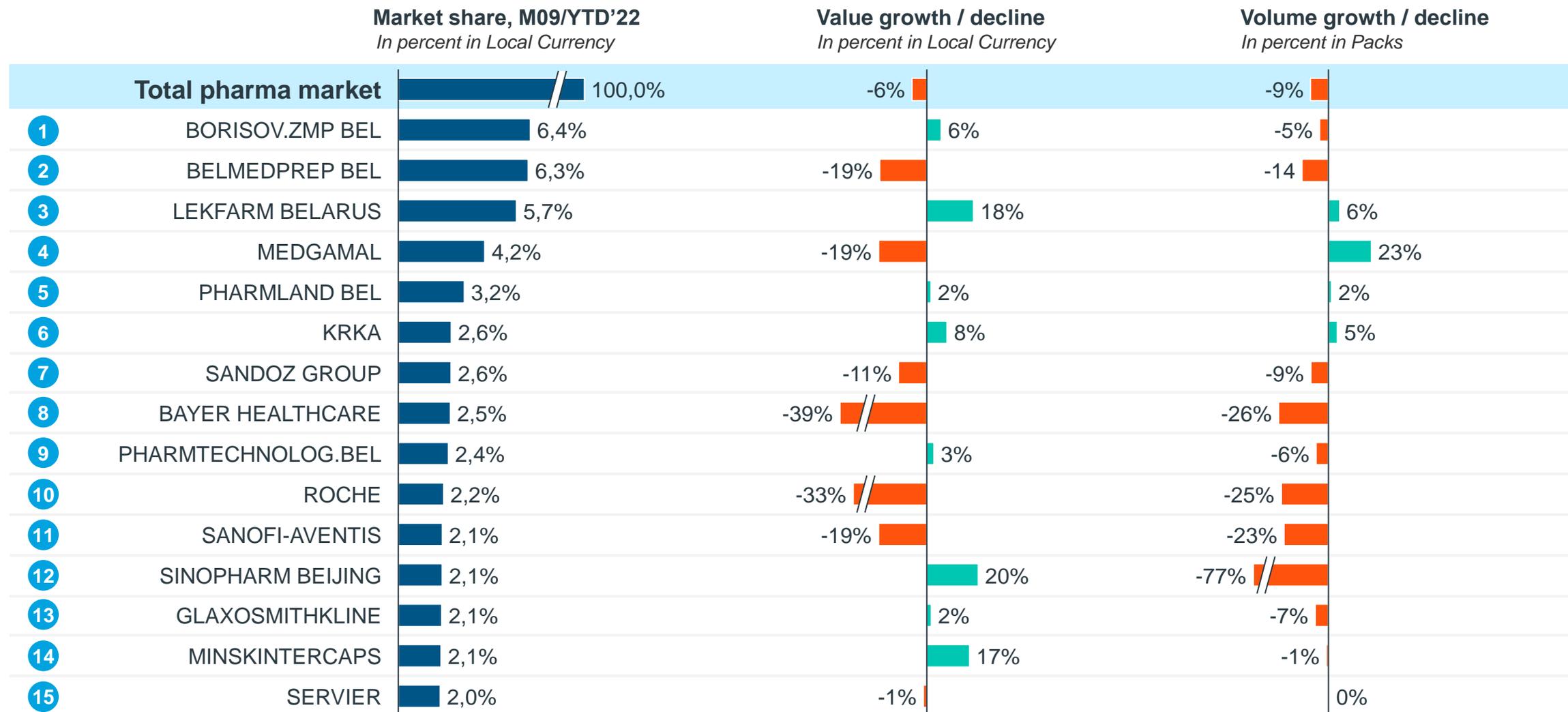


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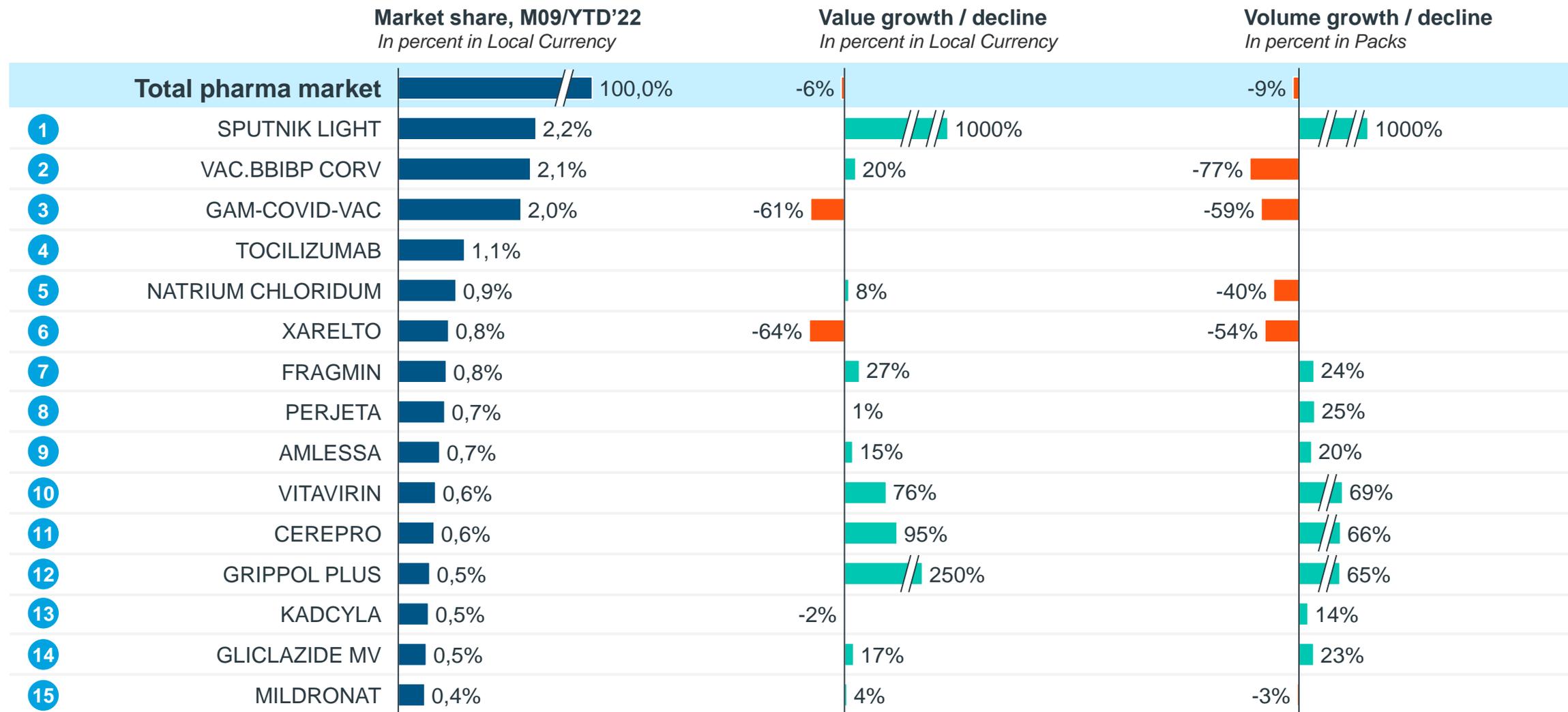


Indicator	BYN	USD	EUR	PACKS
Value M09/YTD'22, Bln.	2,06	0,77	0,73	0,25
Growth M09/YTD'22, %	▼ -5,8%	▼ -9,7%	▲ 1,8%	▼ -9,4%

TOP-15 corporations on Belarus market, September 2022



TOP-15 brands on Belarus market, September 2022



Uzbekistan pharma market growth in September 2022

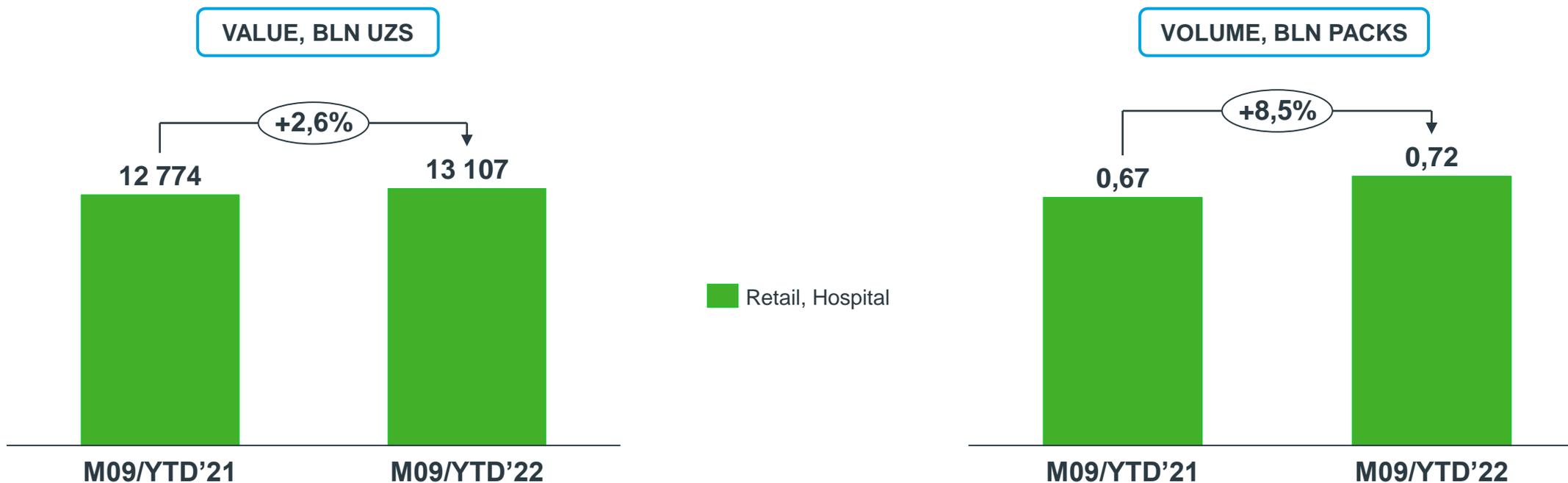
Market grew by 3% in value and 9% in volume



12,2%

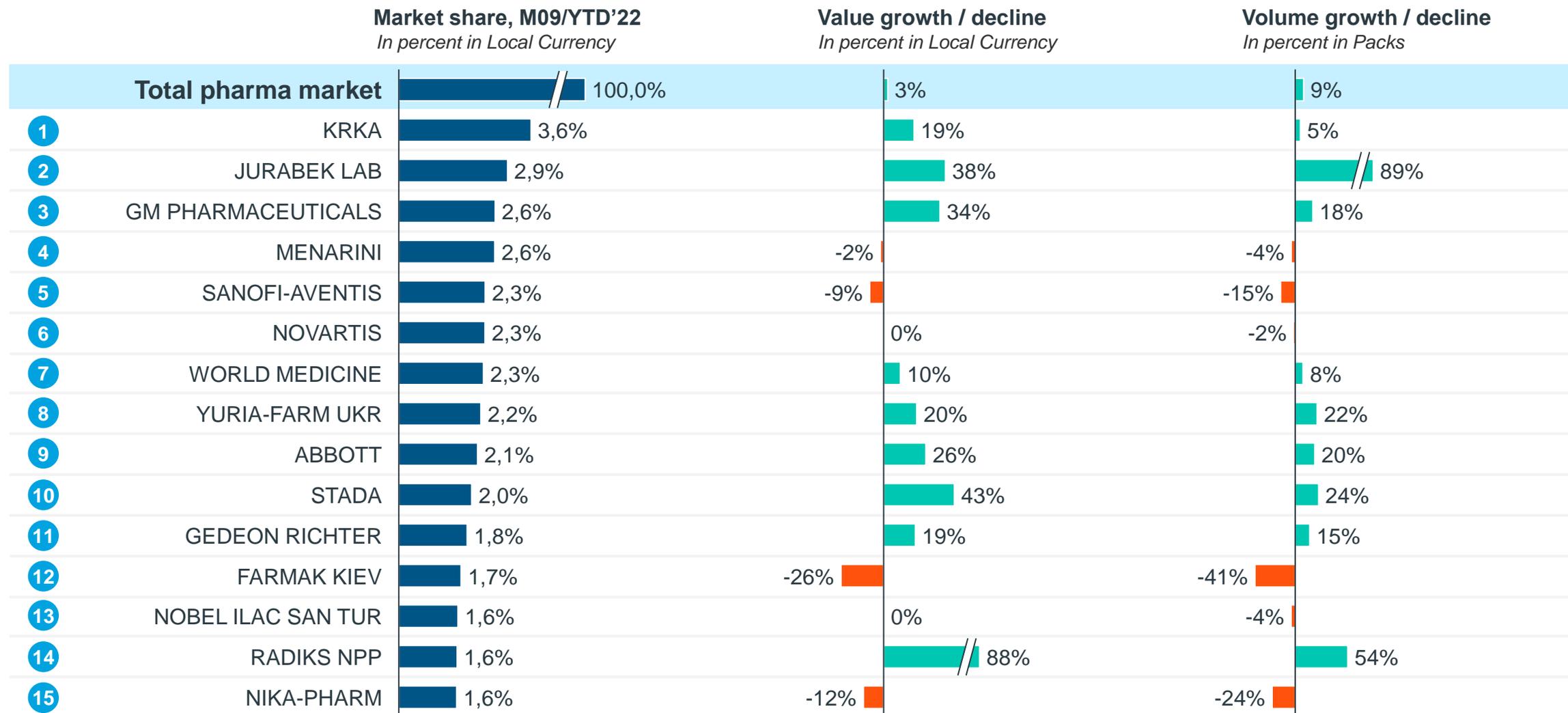


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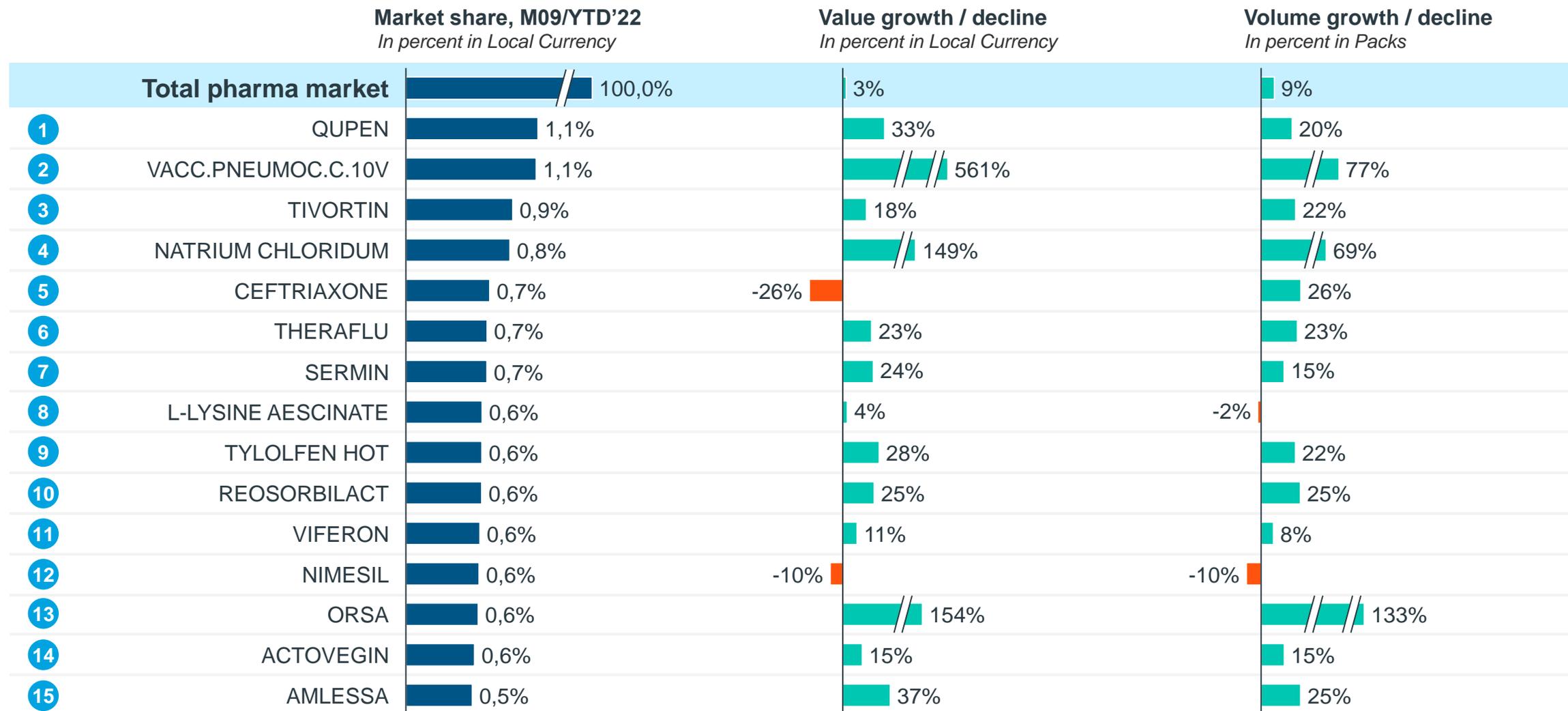
Indicator	UZS	USD	EUR	PACKS
Value M09/YTD'22, Bln.	13 107	1,19	1,12	0,72
Growth M09/YTD'22, %	▲ 2,6%	▼ -1,3%	▲ 10,8%	▲ 8,5%

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



Kyrgyzstan pharma market growth in September 2022

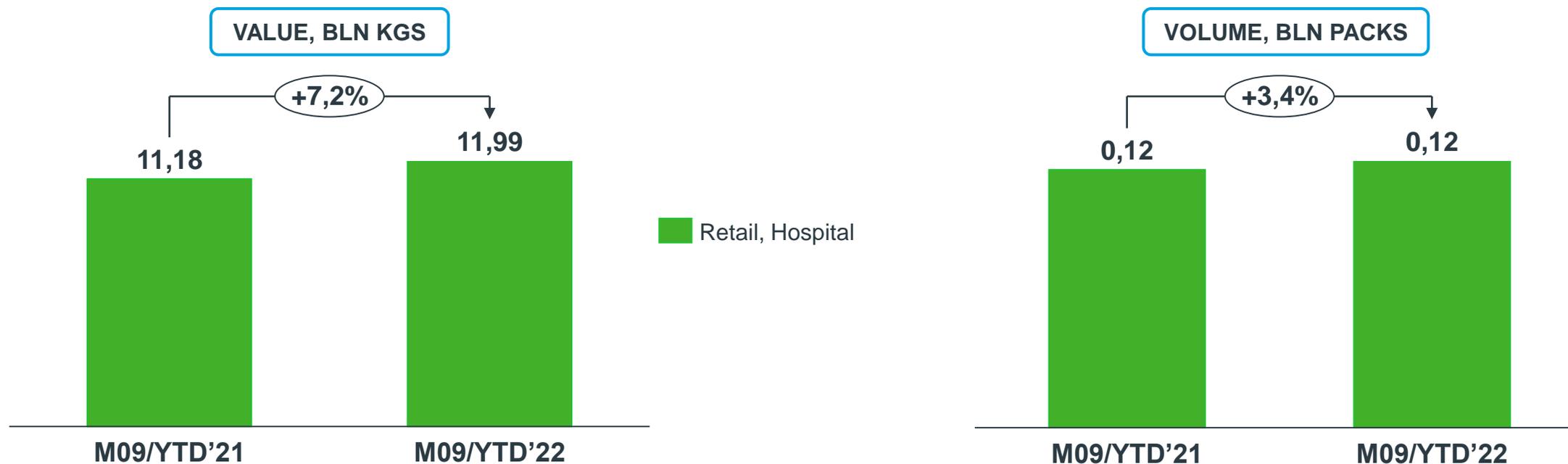
Market grew by 7% in value and by 3% in volume



15,5%

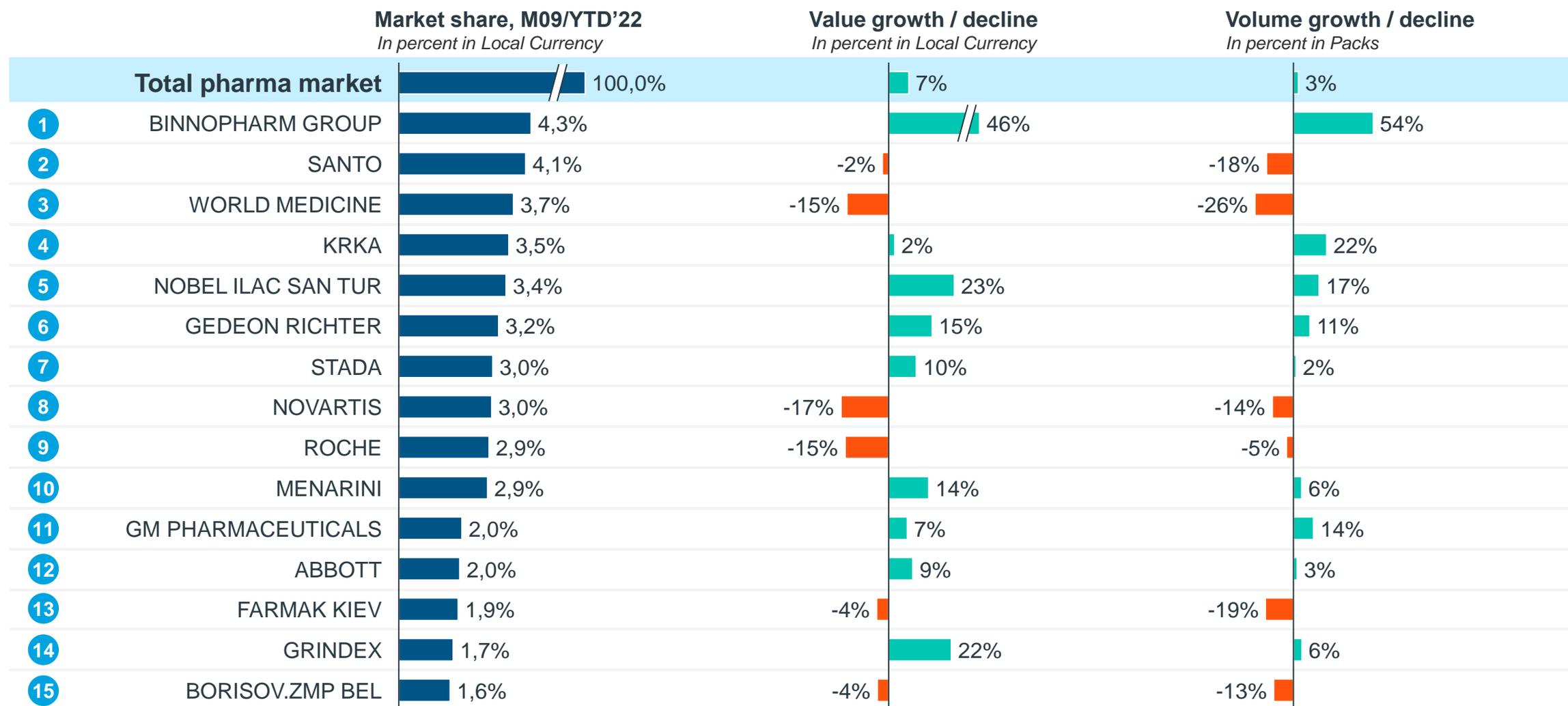


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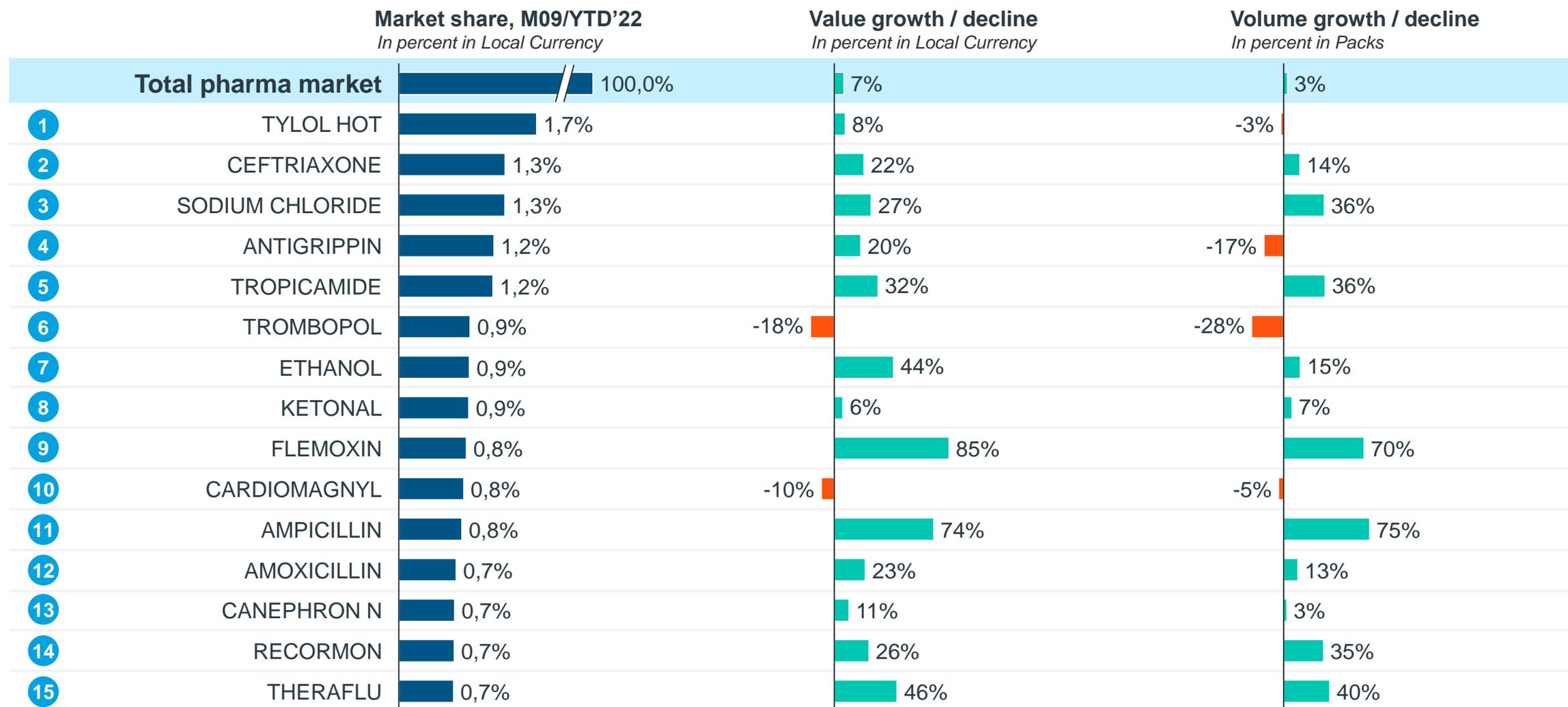


Indicator	KGS	USD	EUR	PACKS
Value M09/YTD'22, Bln.	12,0	0,14	0,14	0,12
Growth M09/YTD'22, %	▲ 7,2%	▲ 8,4%	▲ 22%	▲ 3,4%

TOP-15 corporations on Kyrgyzstan market, September 2022



TOP-15 brands on Kyrgyzstan market, September 2022



Mongolia pharma market growth in September 2022

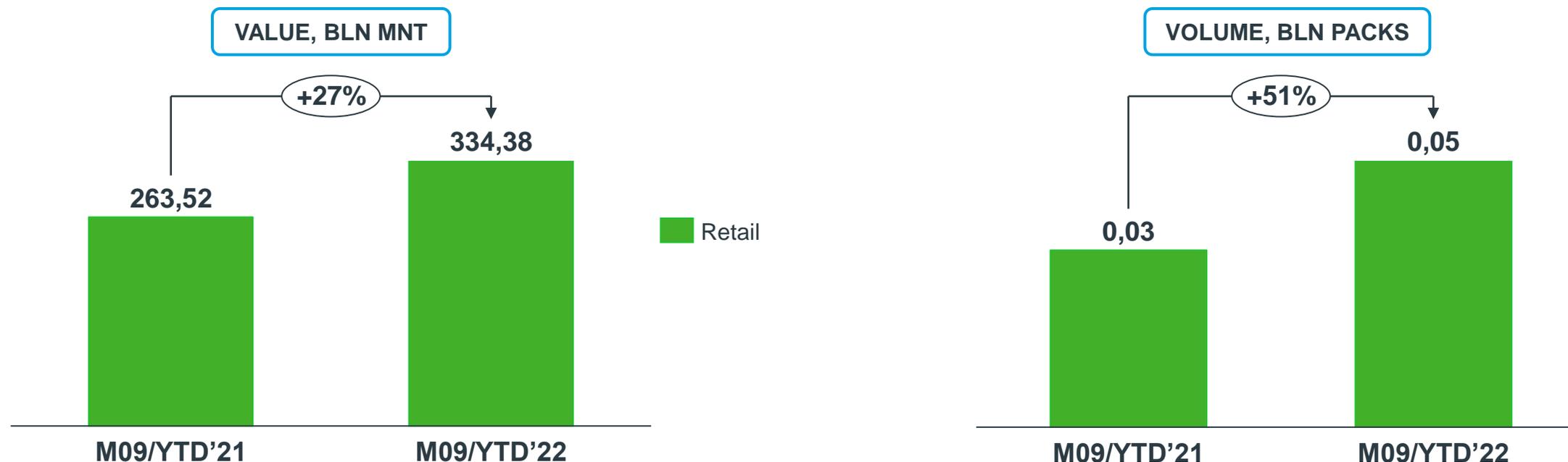
Market grew by 27% in value and by 51% in volume



13,8%



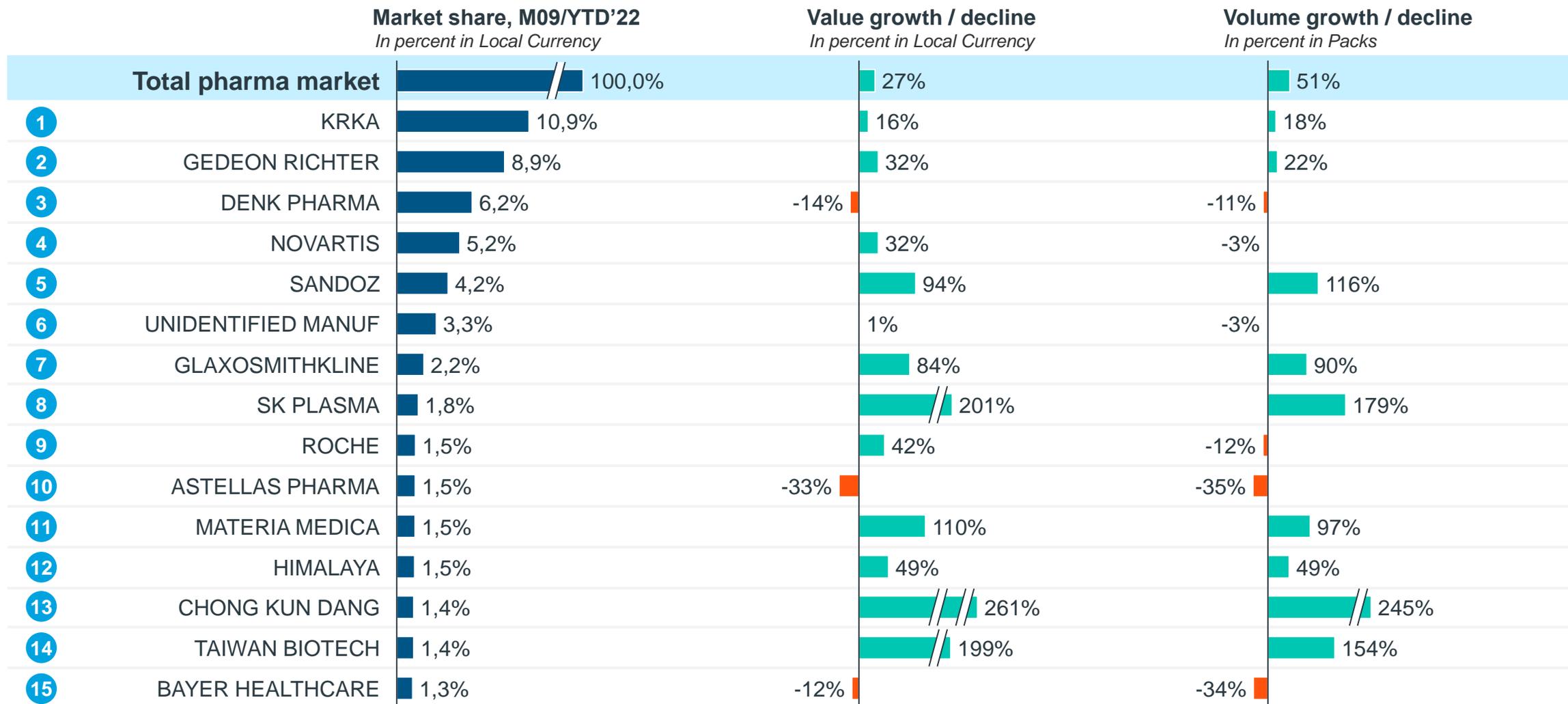
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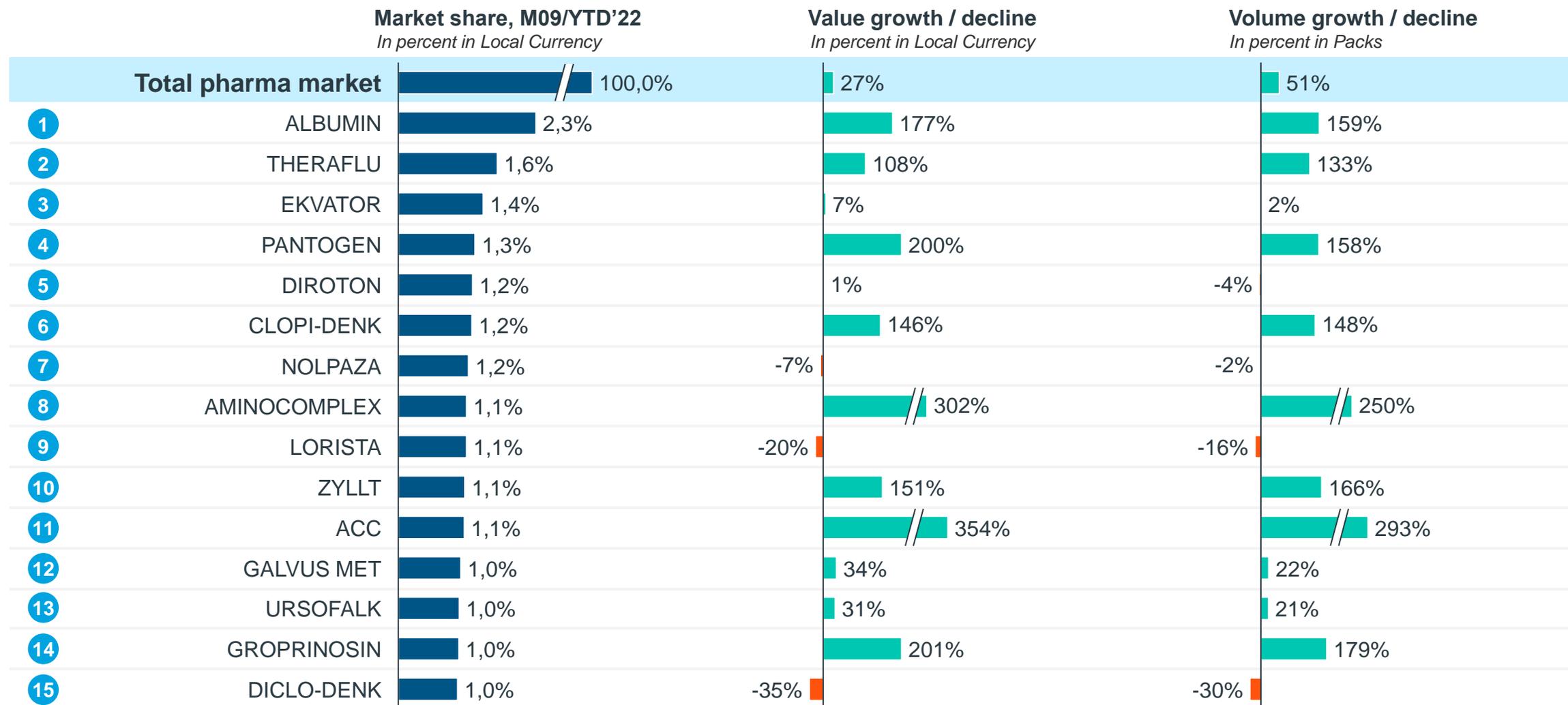
Indicator	MNT	USD	EUR	PACKS
Value M09/YTD'22, Bln.	334	0,11	0,10	0,05
Growth M09/YTD'22, %	▲ 27%	▲ 18%	▲ 33%	▲ 51%

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

TOP-15 corporations on Mongolia market, September 2022



TOP-15 brands on Mongolia market, September 2022



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