



# Facts from IQVIA

M05 2022



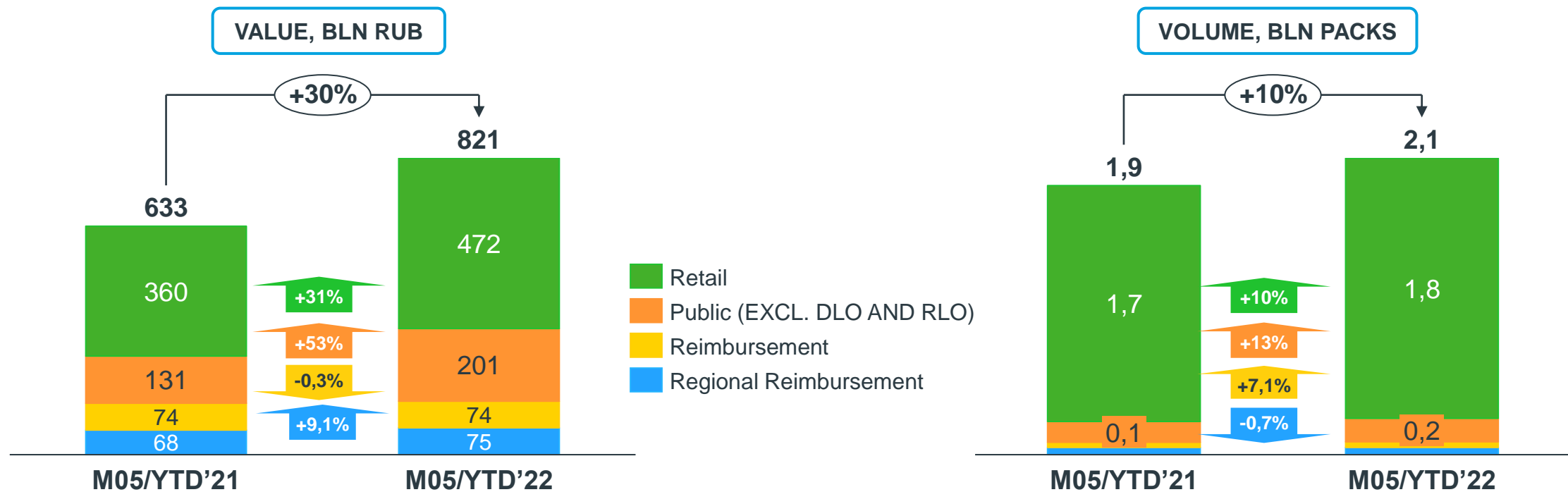
17,1%



INFLATION

# Russian pharma market growth in May 2022

Market grew by 30% in value and 10% in volume



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

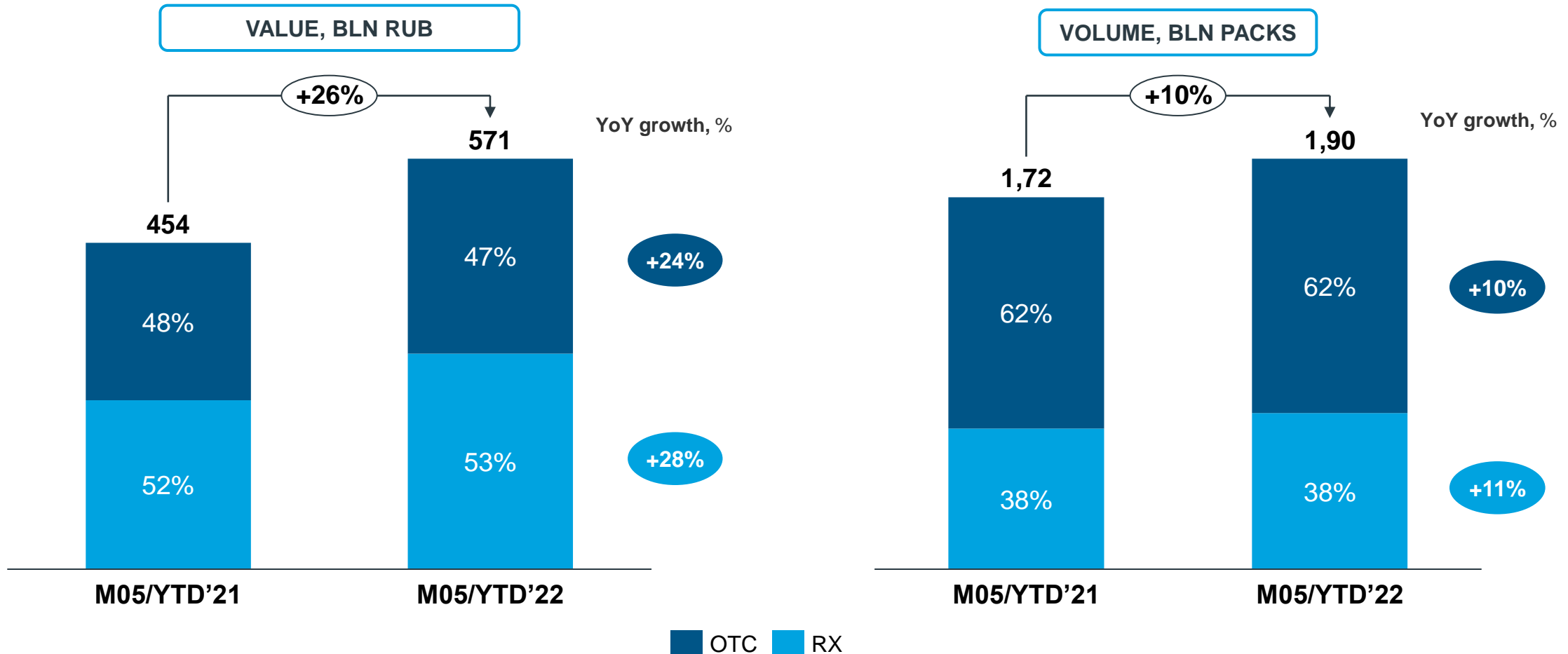
Indicator	RUB	USD	EUR	PACKS
Value M05/YTD'22, Bln.	821	10,3	9,4	2,1
Growth M05/YTD'22, %	▲ 30%	▲ 21%	▲ 33%	▲ 10%

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



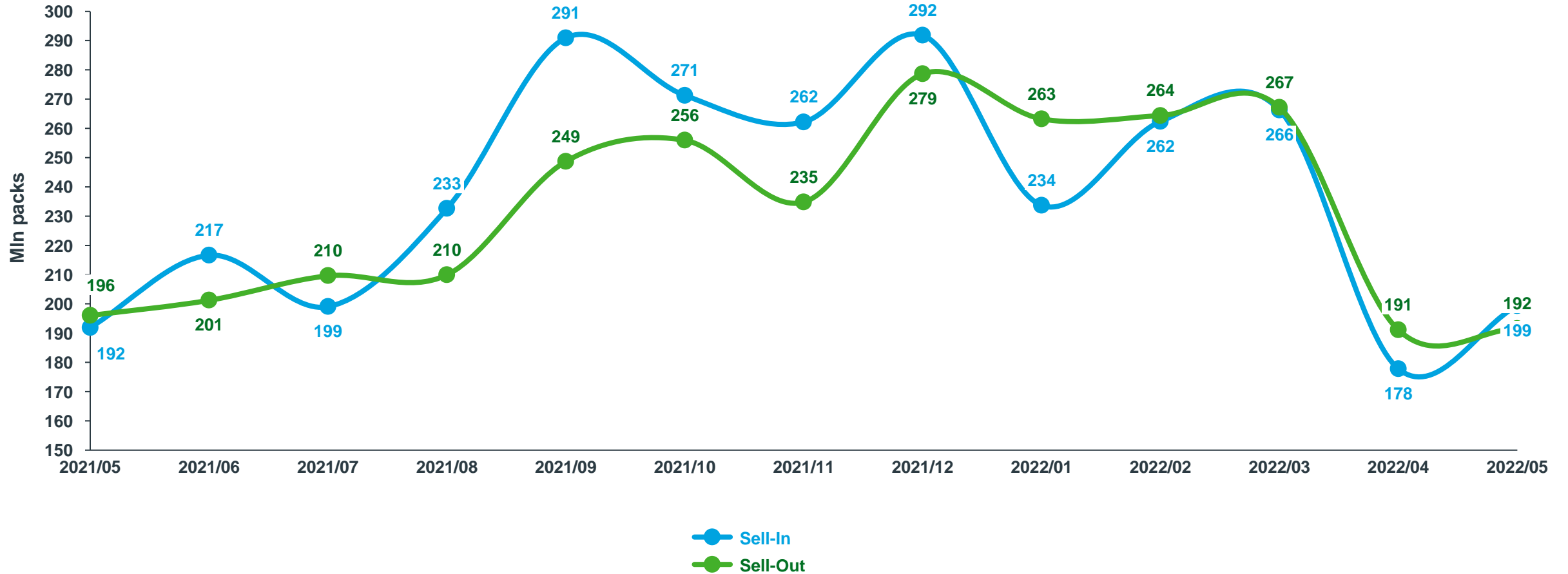
# Russian pharma market increase in May 2022

*Retail Sell-Out: Market grew by 26% in value and 10% in volume*



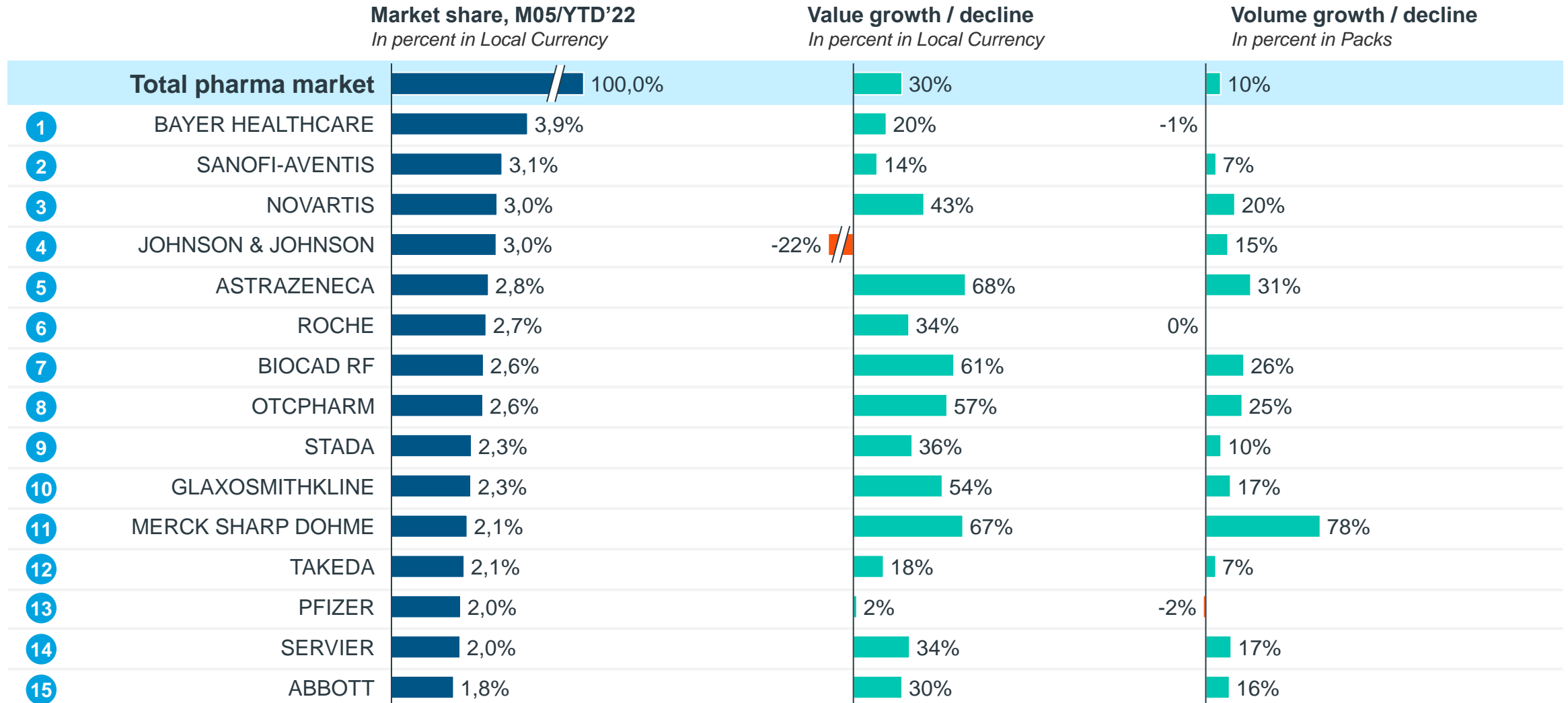


# Sell-In vs Sell-Out, OTC registered drugs





# TOP-15 corporations on Russian market, May 2022

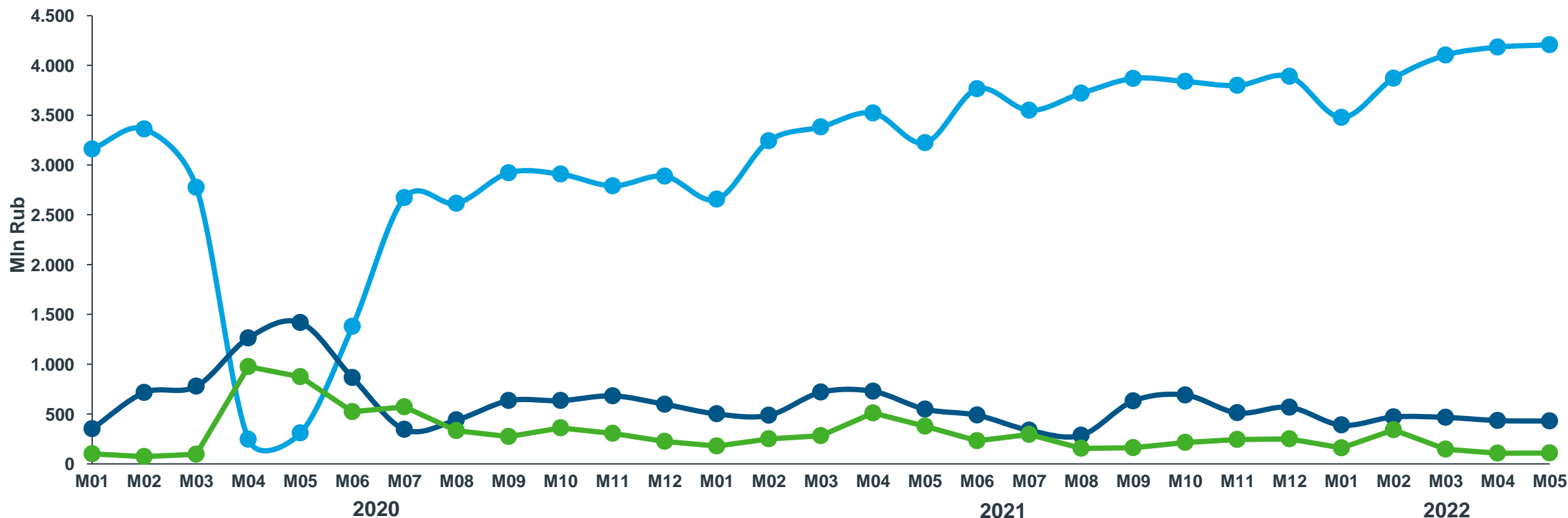




# TOP-15 brands on Russian market, May 2022

		Market share, M05/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>
<b>Total pharma market</b>		100,0%	30%	10%
1	XARELTO	1,4%	17%	30%
2	ARBIDOL	1,2%	182%	166%
3	KEYTRUDA	1,0%	55%	55%
4	ILSIRA	0,9%	490%	516%
5	ELIQUIS	0,9%	42%	58%
6	ESPERAVIR	0,9%		
7	OPDIVO	0,9%	32%	36%
8	REVLIMIDE	0,9%	1%	1%
9	ELIZARIA	0,7%	20%	20%
10	EVUSHELD	0,6%		
11	CORONAVIR	0,6%	108%	198%
12	EVRYSDI	0,5%	125%	126%
13	ZOLGENSMA	0,5%	217%	333%
14	TIVICAY	0,5%	121%	125%
15	ARTLEGIA	0,5%	12%	11%

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

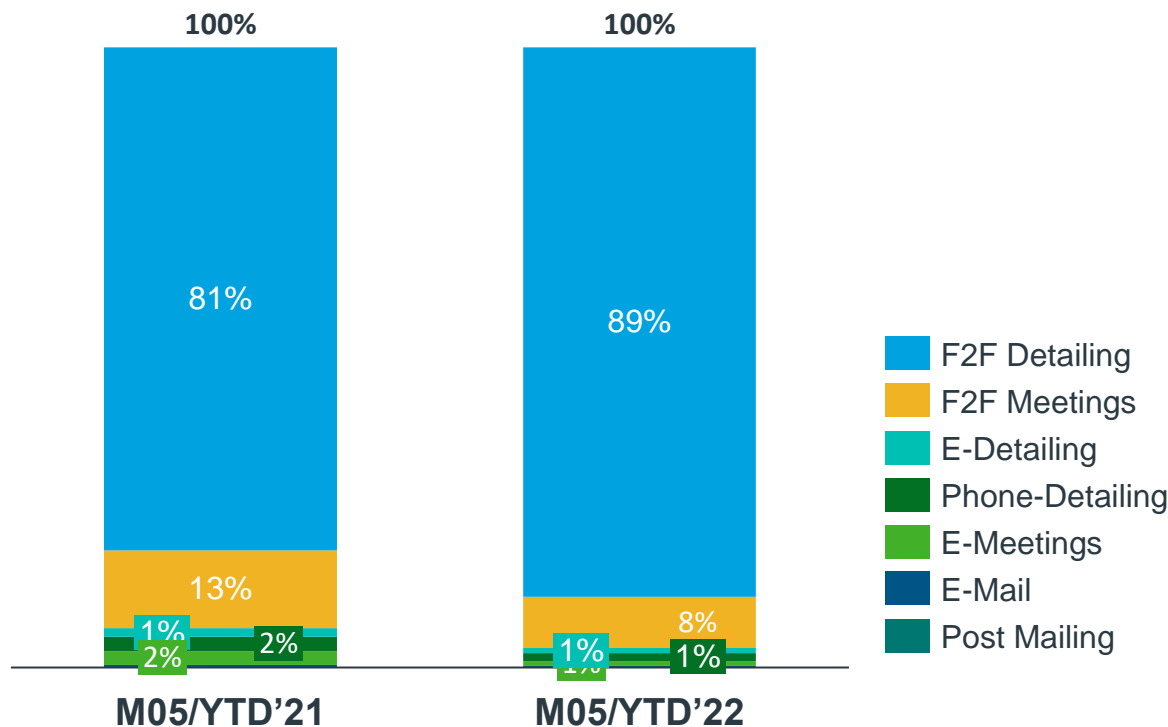
Source: IQVIA Russia, Channel Dynamics promo évaluation; Specialties: Allergology/Pulmonology, Cardiology, Dermatology, Diabetes, E.N.T., Gastroenterology, GPs, Gynecology, Neurology, Oncology, Pediatric, Pharma, Psychotherapy, Urology.



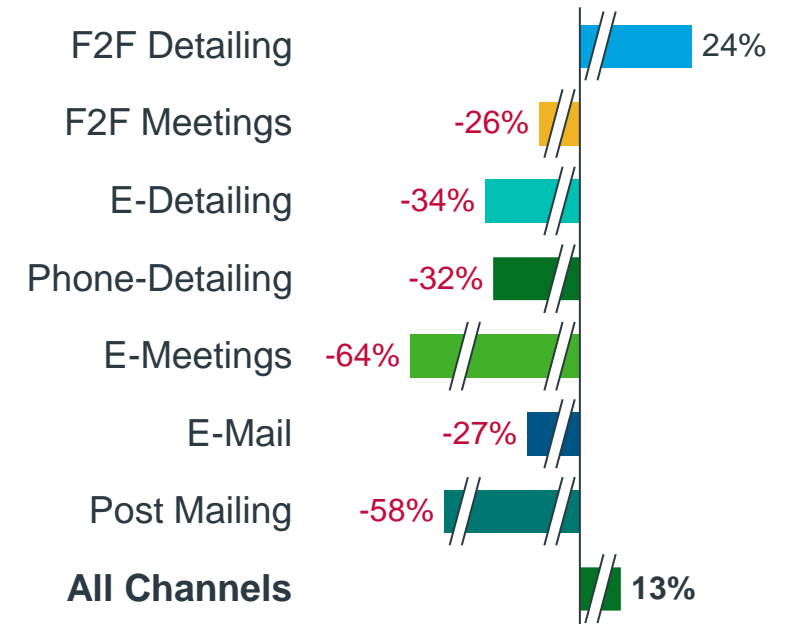
# Total Market overall promotional value in Rub increased by 13%, YTD May 2022 vs 2021



Promotional value in Rub share by channel



% Changes in promotional value in Rub by channel YTD May 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

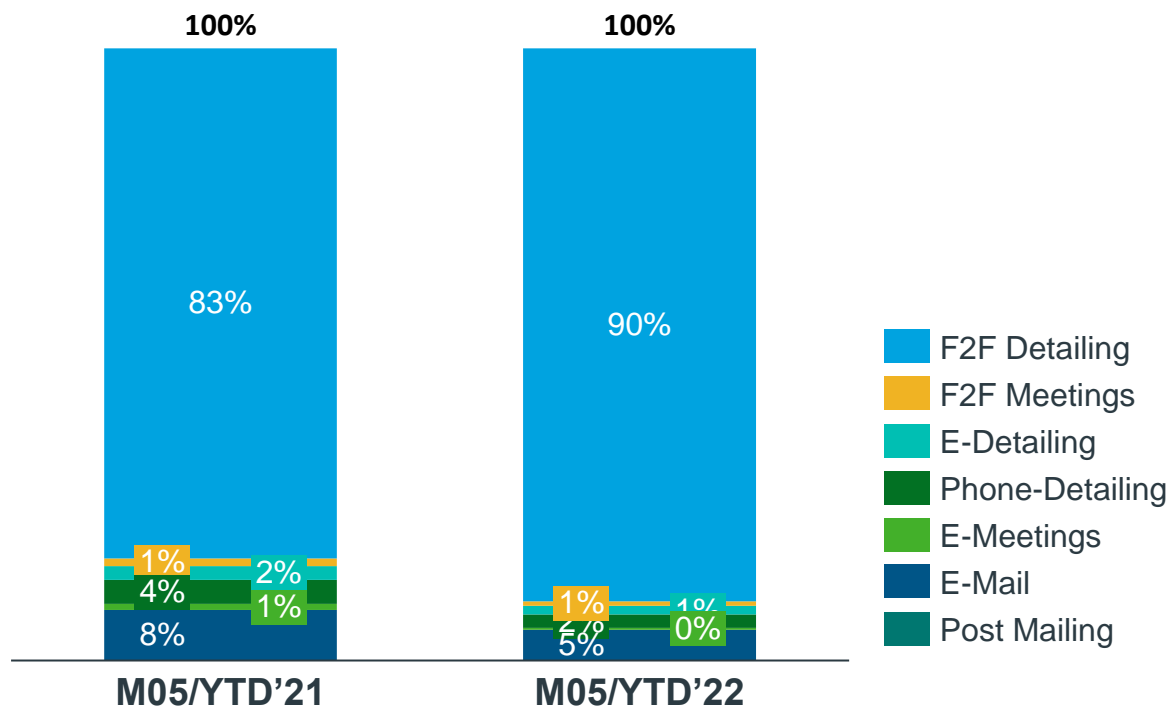
Source: IQVIA Russia, Channel Dynamics promo évaluation; Specialties: Allergology/Pulmonology, Cardiology, Dermatology, Diabetes, E.N.T., Gastroenterology, GPs, Gynecology, Neurology, Oncology, Pediatric, Pharma, Psychotherapy, Urology.



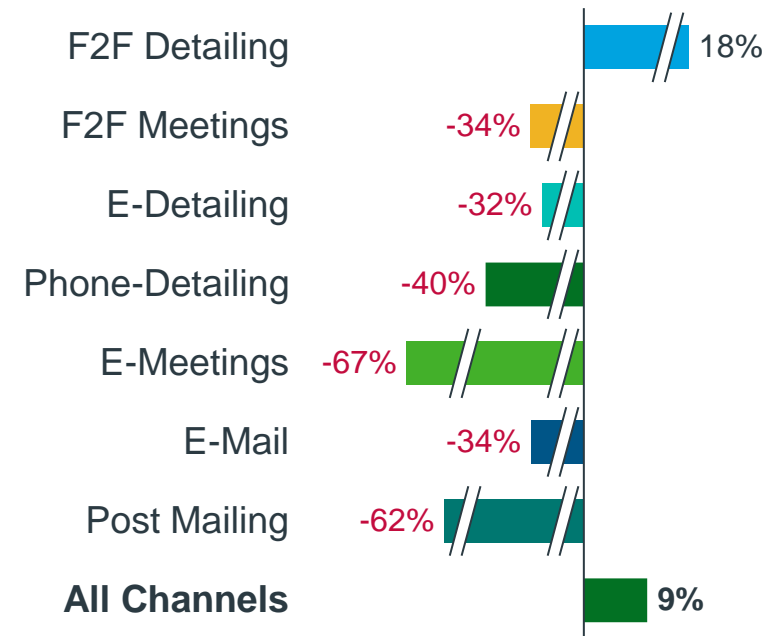
# Total Market overall promotional volume (contacts) increased by 9%, YTD May 2022 vs 2021



Promotional value in Rub share by channel



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



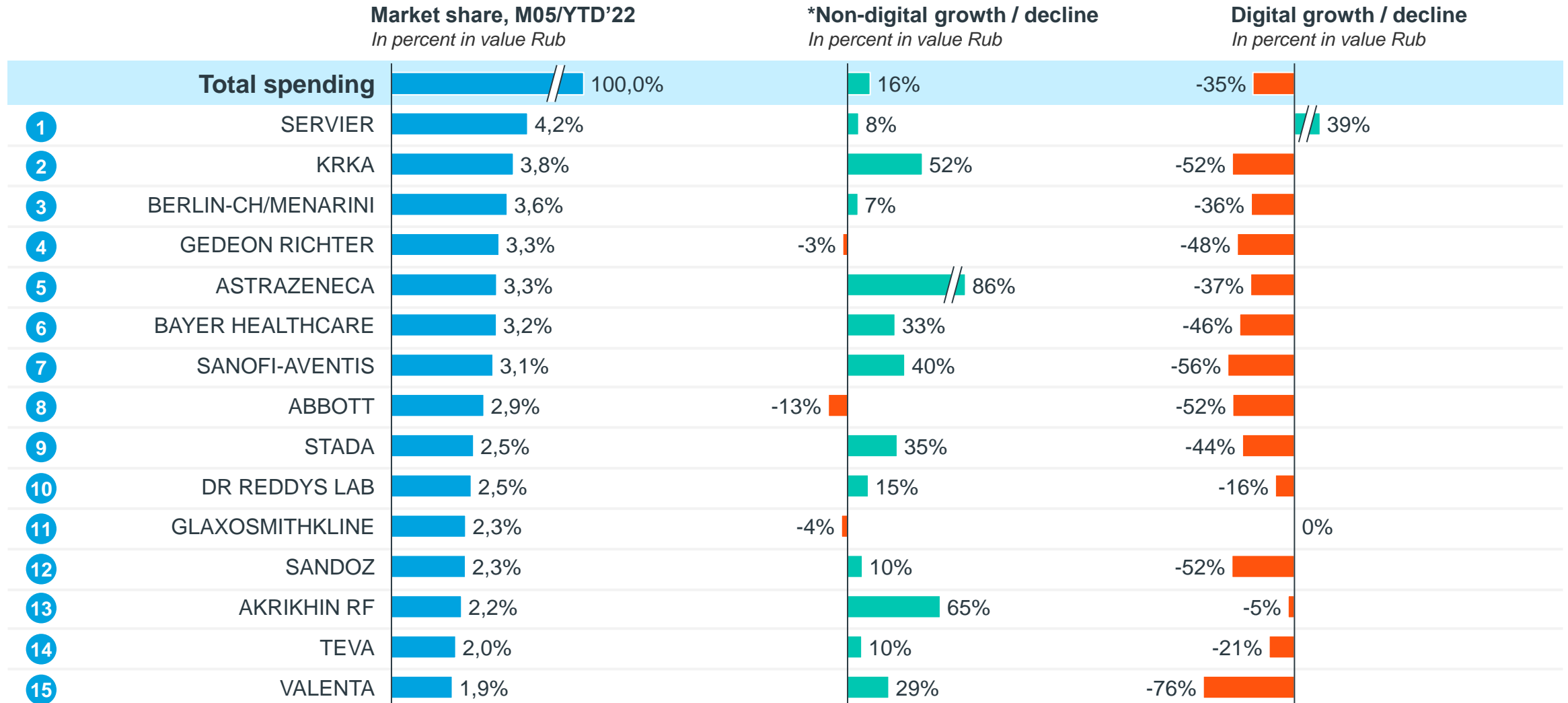
**F2F Detailing** – Reps visits. **Traditional others:** 1) F2F meetings – group meetings, round tables etc, 2) Phone Detailing – phone calls, 3) E-mail – communication via email. 4) Post Mailing – paper mails. **Digital:** 1) E-detailing – 1-1 calls visits using digitabl platforms 2) E-meetings – group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



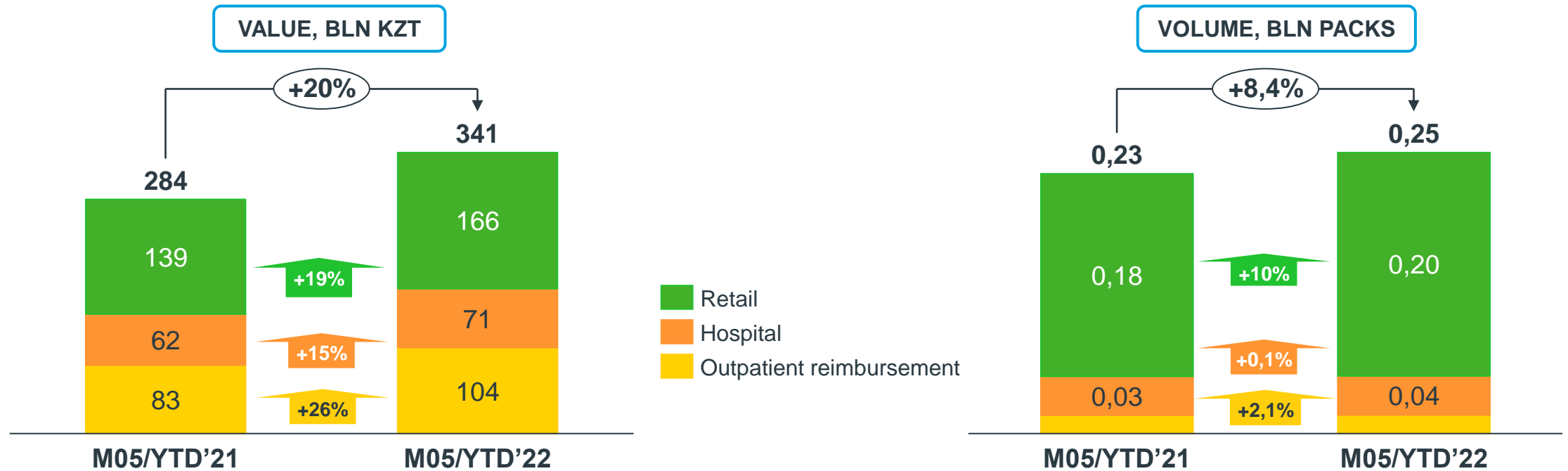
14,0%



INFLATION

# Kazakhstan pharma market growth in May 2022

Market grew by 20% in value and 8% in volume

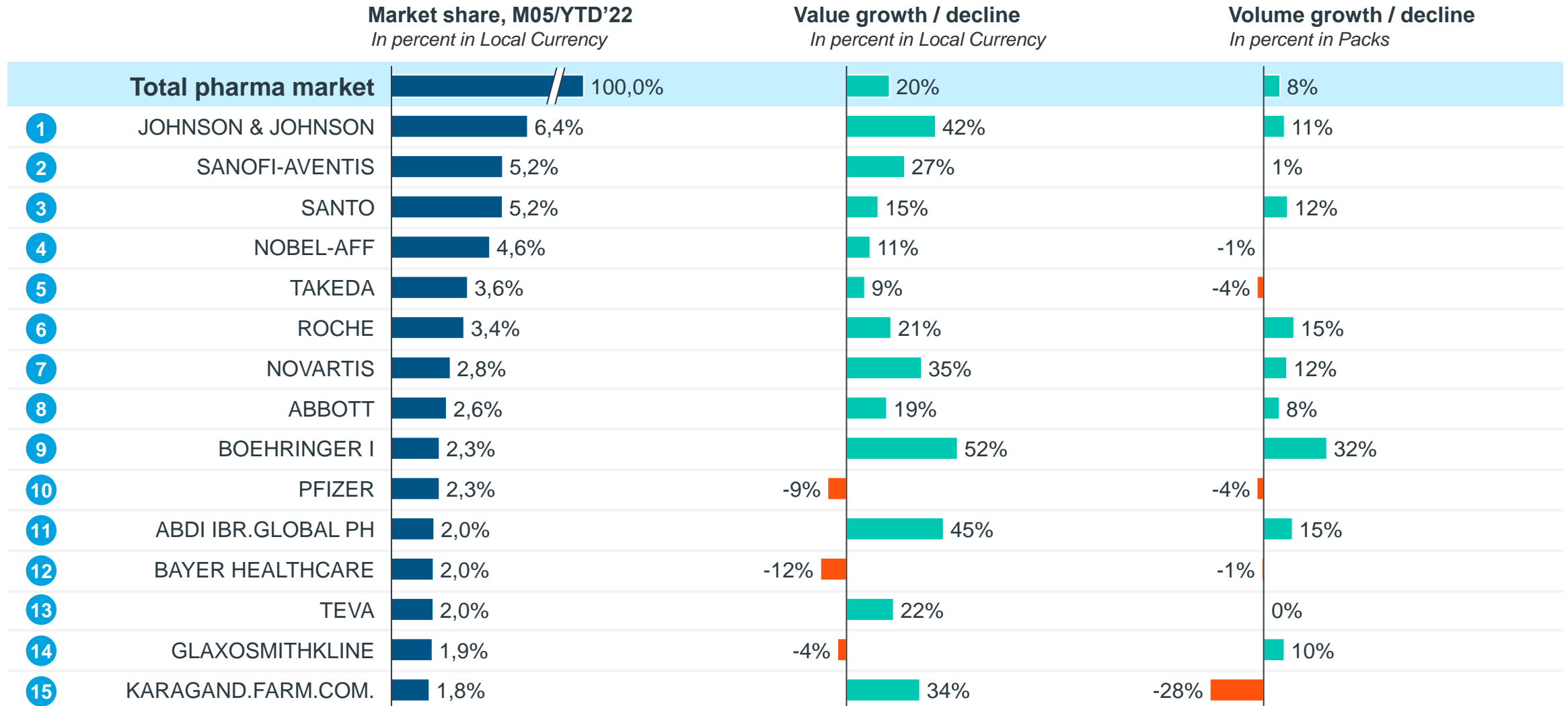


Indicator	KZT	USD	EUR	PACKS
Value M05/YTD'22, Bln.	341	0,76	0,69	0,25
Growth M05/YTD'22, %	▲ 20%	▲ 12%	▲ 23%	▲ 8,4%

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, May 2022



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



# TOP-15 brands on Kazakhstan market, May 2022

		Market share, M05/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>
<b>Total pharma market</b>		100,0%	20%	8%
1	HEXAXIM	1,3%	1%	0%
2	PREVENAR	1,2%	-8%	45%
3	SPINRAZA	1,0%	55%	63%
4	HERCEPTIN	1,0%	26%	23%
5	ELAPRASE	1,0%	6%	5%
6	SIMPONI	1,0%	53%	53%
7	KEYTRUDA	1,0%	106%	109%
8	PENTAXIM	0,9%		
9	IMBRUVICA	0,9%	69%	68%
10	REVOLADE	0,8%	128%	117%
11	IMMUNATE	0,8%	70%	-1%
12	STELARA	0,8%	242%	243%
13	CORONIM	0,7%	10%	9%
14	VICTOZA	0,7%	91%	84%
15	METOJECT	0,6%	10%	5%



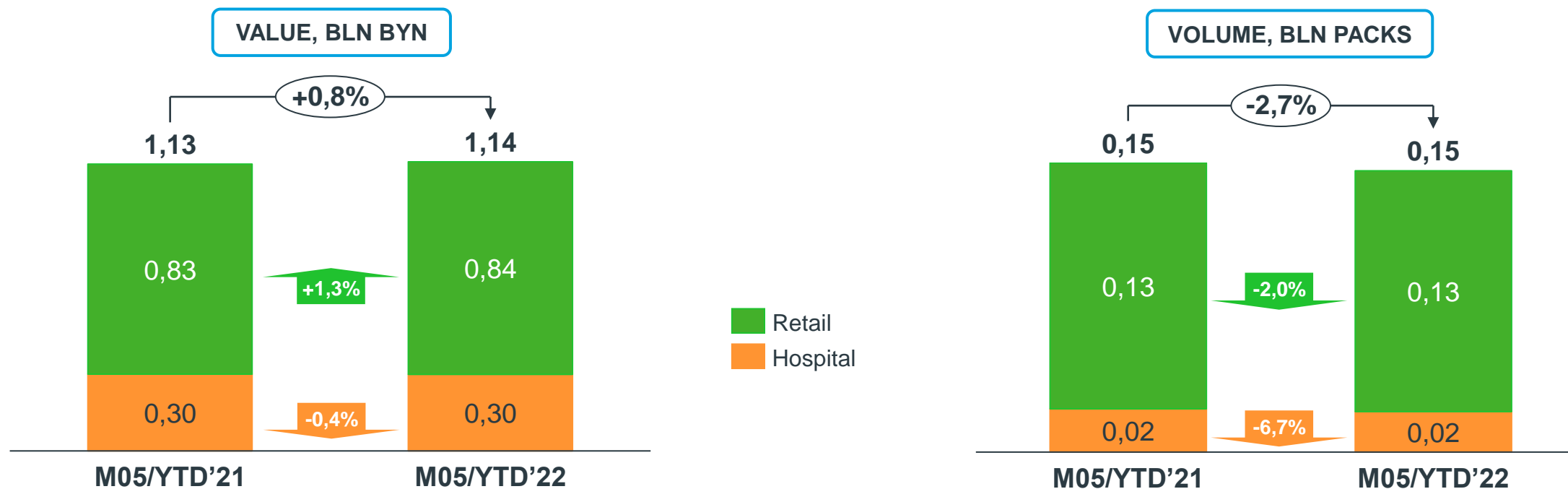
17,0%



INFLATION

# Belarus pharma market growth in May 2022

Market grew by 1% in value and dropped by 3% in volume

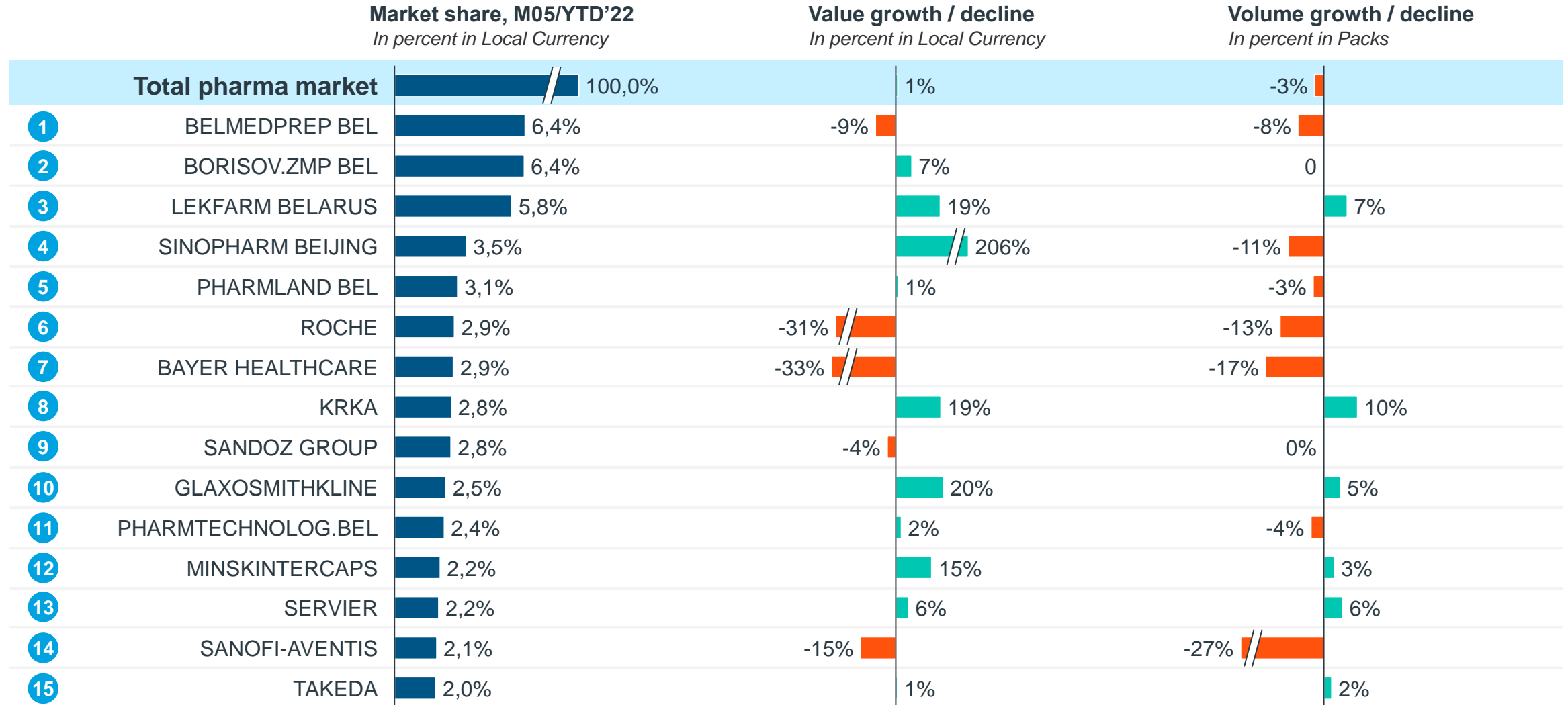


Indicator	BYN	USD	EUR	PACKS
Value M05/YTD'22, Bln.	1,14	0,42	0,38	0,15
Growth M05/YTD'22, %	▲ 0,8%	▼ -4,9%	▲ 4,0%	▼ -2,7%

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



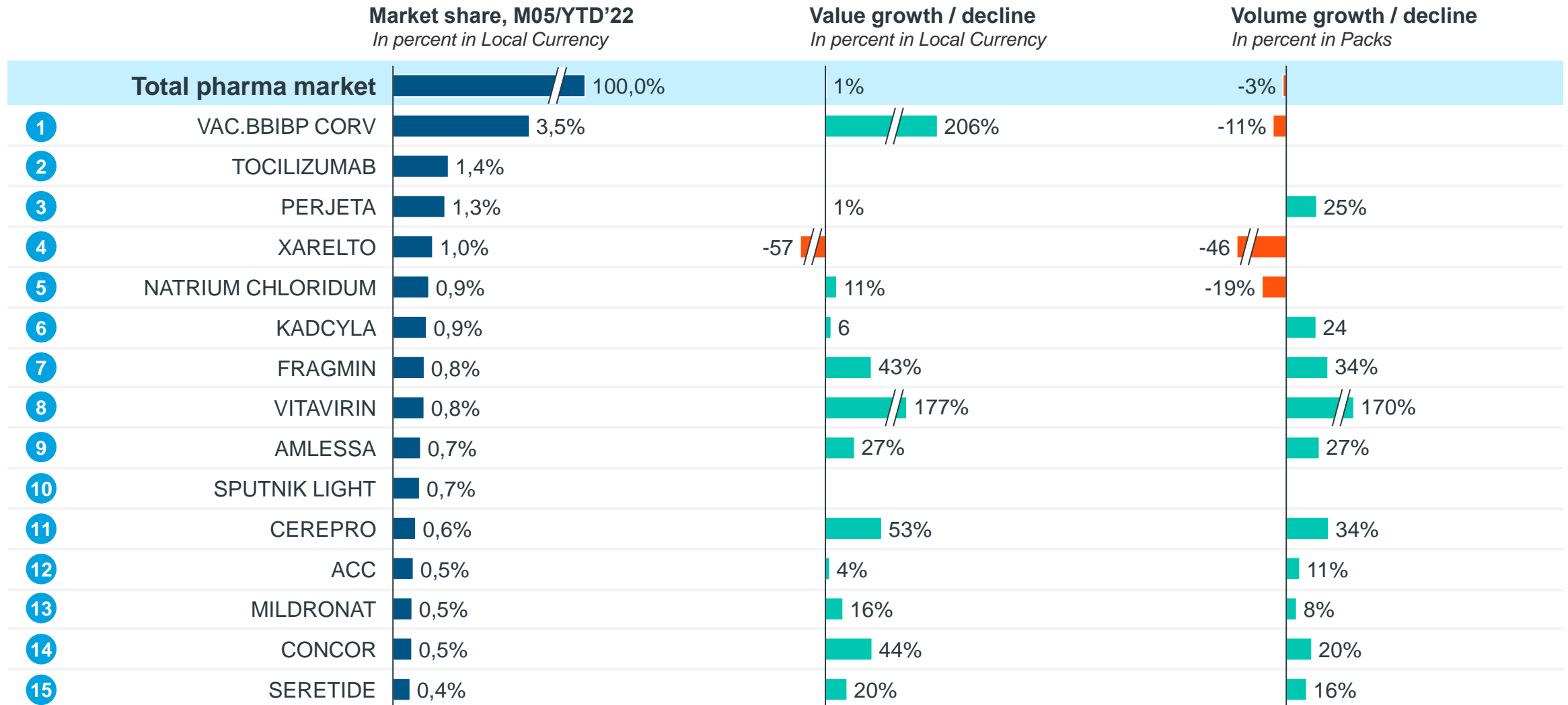
# TOP-15 corporations on Belarus market, May 2022



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



# TOP-15 brands on Belarus market, May 2022







10,95%



INFLATION

# Uzbekistan pharma market growth in May 2022

Market grew by 5% in value and 8% in volume



Indicator	UZS	USD	EUR	PACKS
Value M05/YTD'22, Bln.	7 338	0,67	0,60	0,41
Growth M05/YTD'22, %	▲ 5,5%	▲ 0,5%	▲ 9,7%	▲ 7,7%



# TOP-15 corporations on Uzbekistan market, May 2022

		Market share, M05/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>
<b>Total pharma market</b>		100,0%	5%	8%
1	KRKA	3,8%	17%	8%
2	NOVARTIS	2,7%	23%	7%
3	MENARINI	2,7%	9%	11%
4	JURABEK LAB	2,7%	101%	122%
5	GM PHARMACEUTICALS	2,4%	30%	15%
6	STADA	2,3%	45%	24%
7	SERUM INSTIT.IND	2,1%	605%	542%
8	WORLD MEDICINE	2,1%	-7%	-9%
9	SANOFI-AVENTIS	2,1%	-19%	-19%
10	GEDEON RICHTER	1,9%	29%	34%
11	ABBOTT	1,8%	22%	14%
12	AVISON PHARM.	1,8%	9%	8%
13	ARTERIUM	1,8%	76%	130%
14	FARMAK KIEV	1,7%	-22%	-36%
15	YURIA-FARM UKR	1,7%	13%	13%

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, May 2022

		Market share, M05/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>
<b>Total pharma market</b>		100,0%	5%	8%
1	VACC.PNEUMOC.C.10V	1,9%	561%	77%
2	QUPEN	1,3%	67%	29%
3	NATRIUM CHLORIDUM	0,8%	239%	120%
4	ACC	0,8%	23%	16%
5	L-LYSINE AESCINATE	0,7%	62%	53%
6	CEFTRIAZONE	0,7%	41%	61%
7	VIFERON	0,7%	30%	37%
8	NIMESIL	0,7%	23%	23%
9	TIVORTIN	0,7%	-4%	-6%
10	SERMIN	0,6%	68%	51%
11	THERAFLU	0,6%	-14%	-14%
12	SEPTOLETE	0,6%	56%	49%
13	AMLESSA	0,6%	31%	20%
14	CALCIUM D3 NYCOMED	0,6%	130%	129%
15	AZIMAC	0,5%	3%	-8%



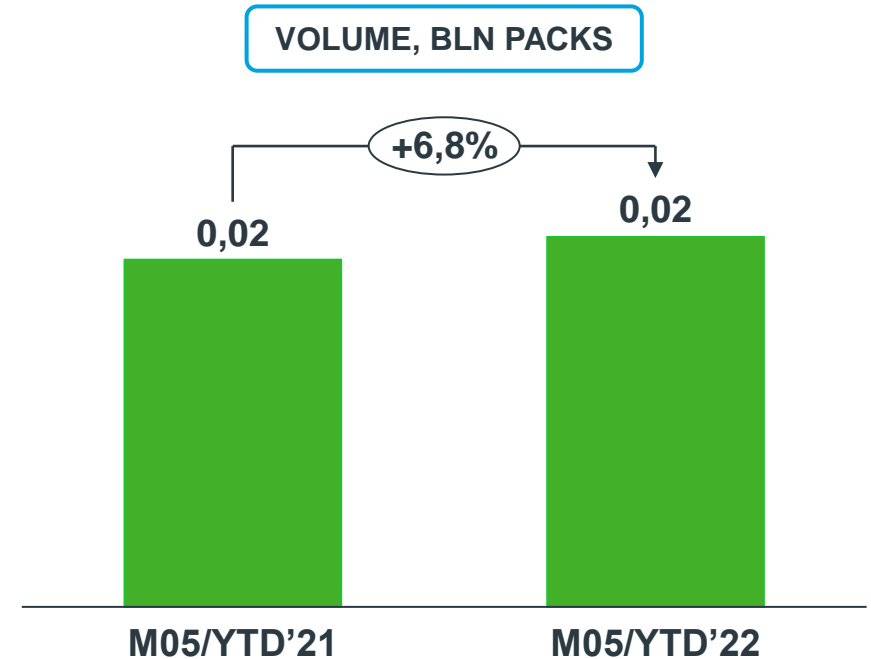
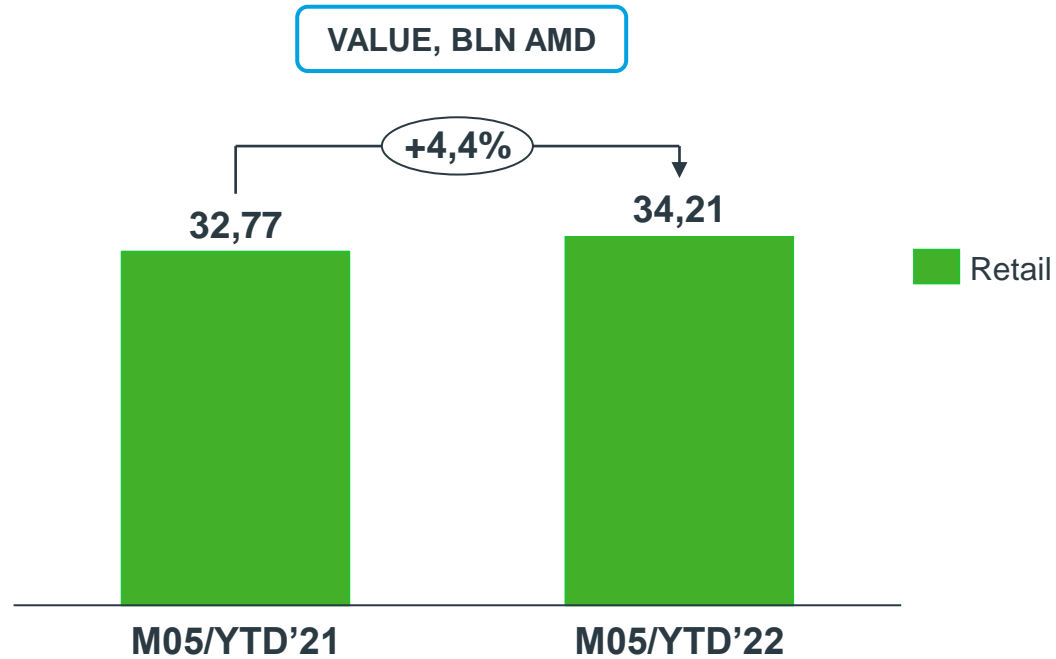
9,0%



INFLATION

# Armenia pharma market growth in May 2022

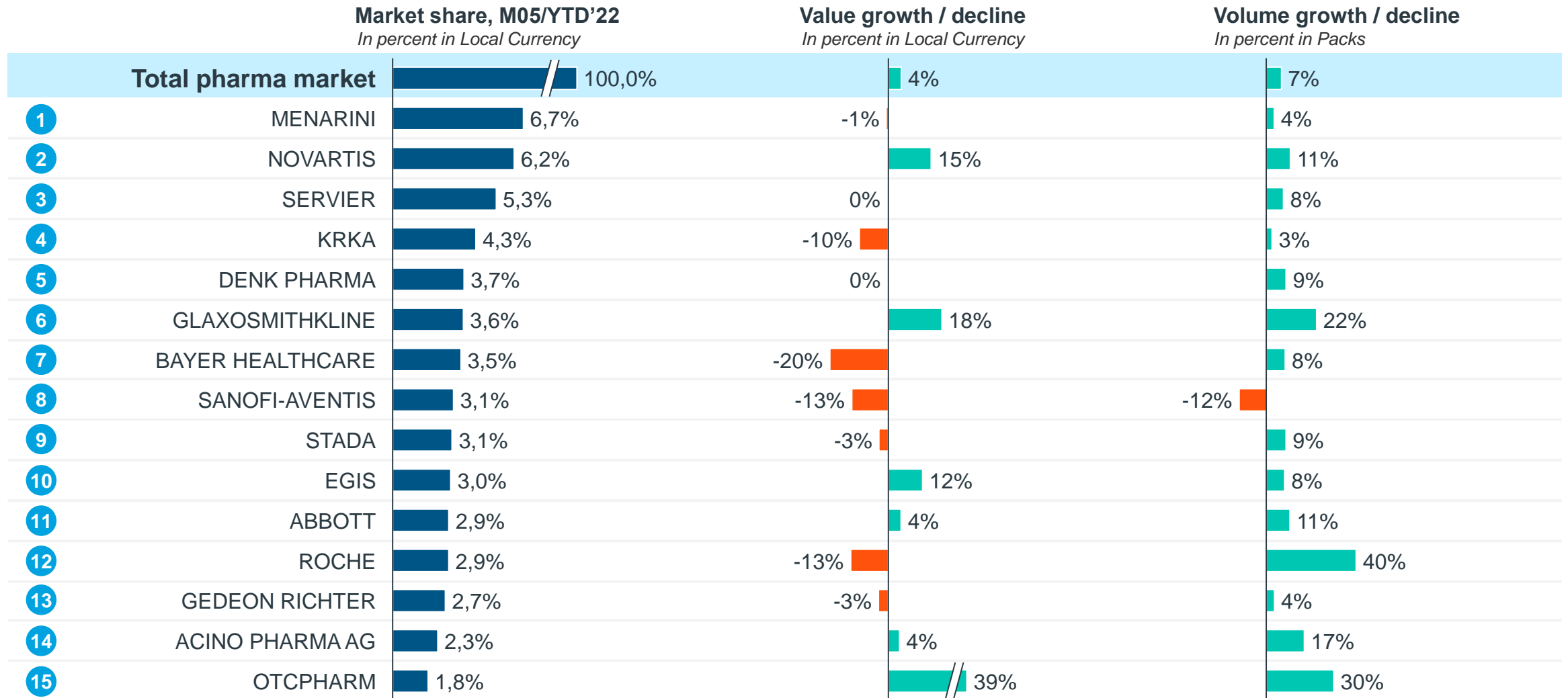
Market grew by 4% in value and by 7% in volume



Indicator	AMD	USD	EUR	PACKS
Value M05/YTD'22, Bln.	34,2	0,07	0,07	0,02
Growth M05/YTD'22, %	▲ 4,4%	▲ 15%	▲ 25%	▲ 6,8%

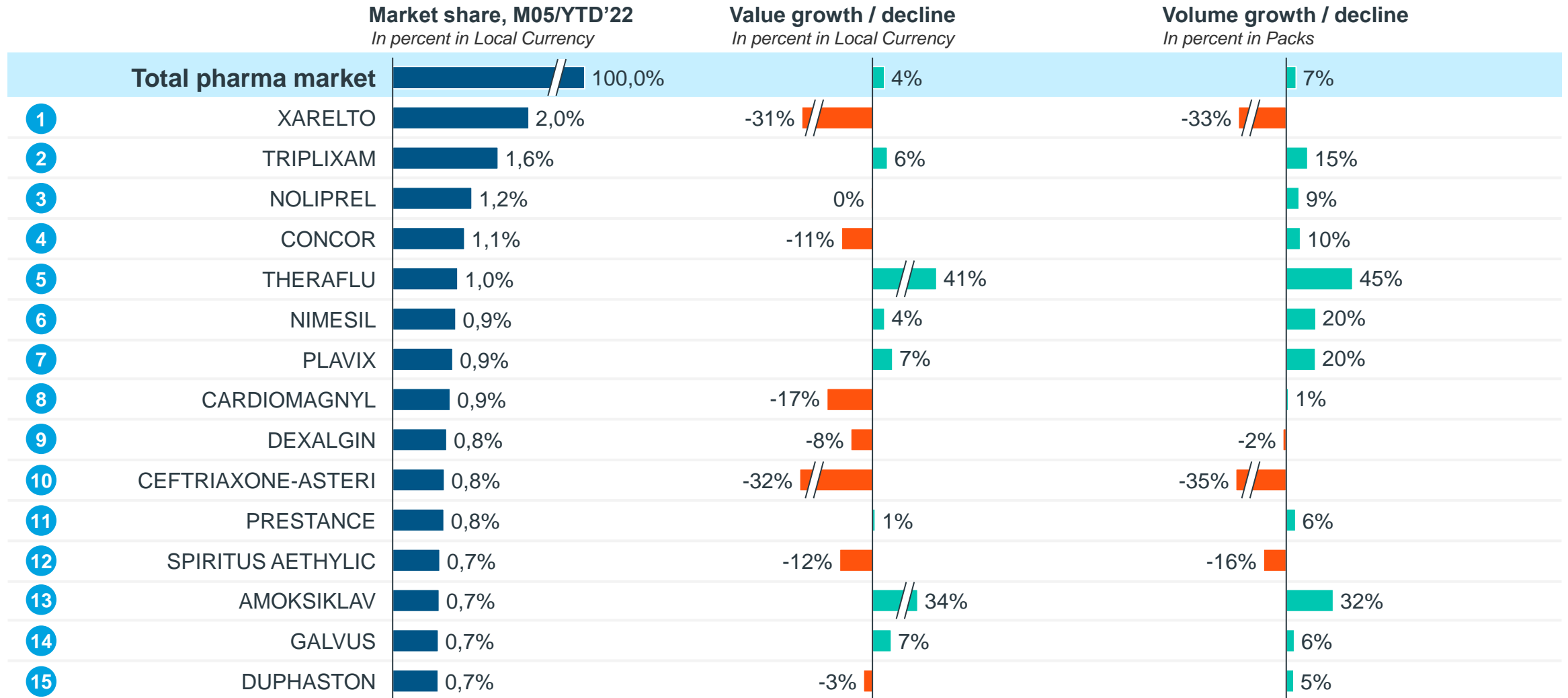


# TOP-15 corporations on Armenia market, May 2022





# TOP-15 brands on Armenia market, May 2022





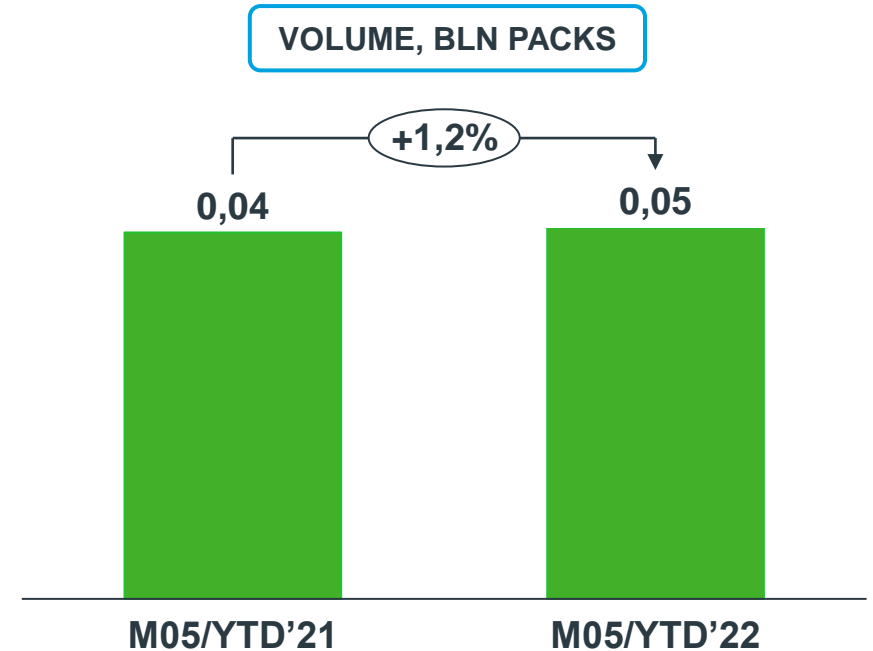
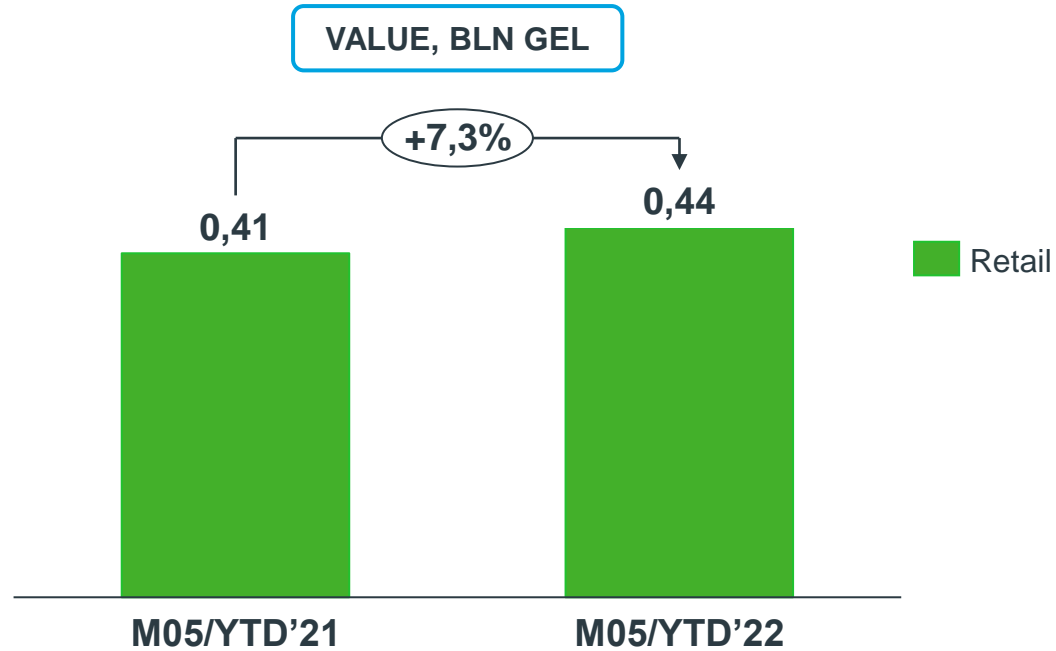
13,3%



INFLATION

# Georgia pharma market growth in May 2022

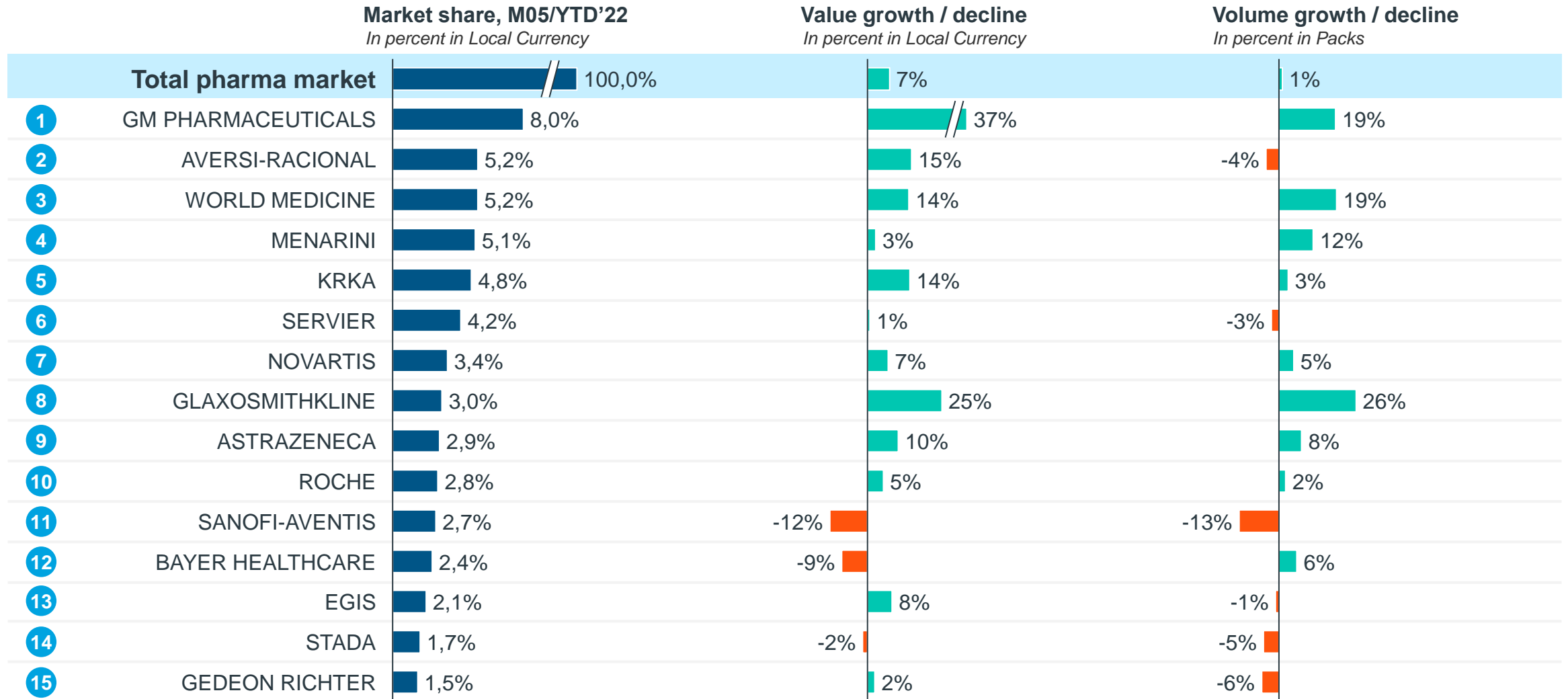
Market grew by 7% in value and by 1% in volume



Indicator	GEL	USD	EUR	PACKS
Value M05/YTD'22, Bln.	0,4	0,14	0,13	0,05
Growth M05/YTD'22, %	▲ 7,3%	▲ 17%	▲ 28%	▲ 1,2%



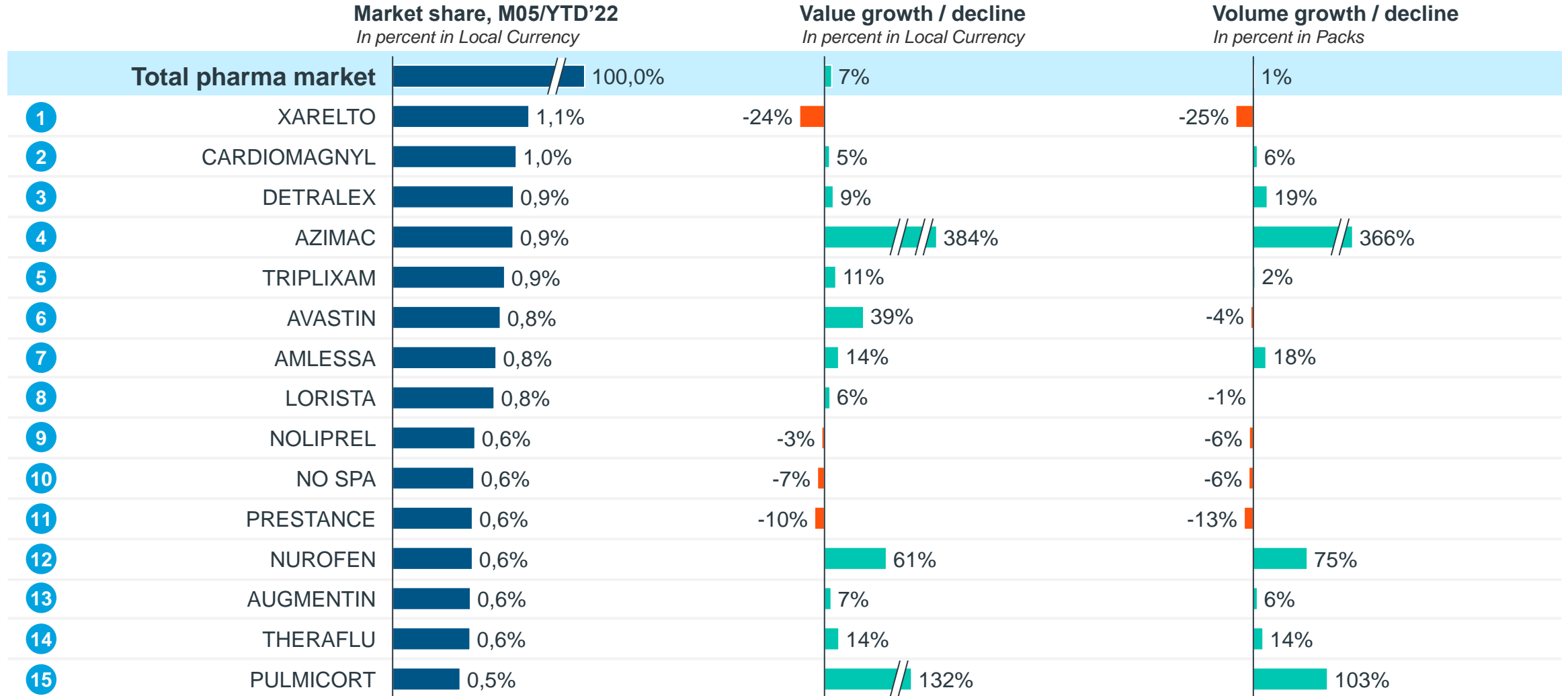
# TOP-15 corporations on Georgia market, May 2022







# TOP-15 brands on Georgia market, May 2022





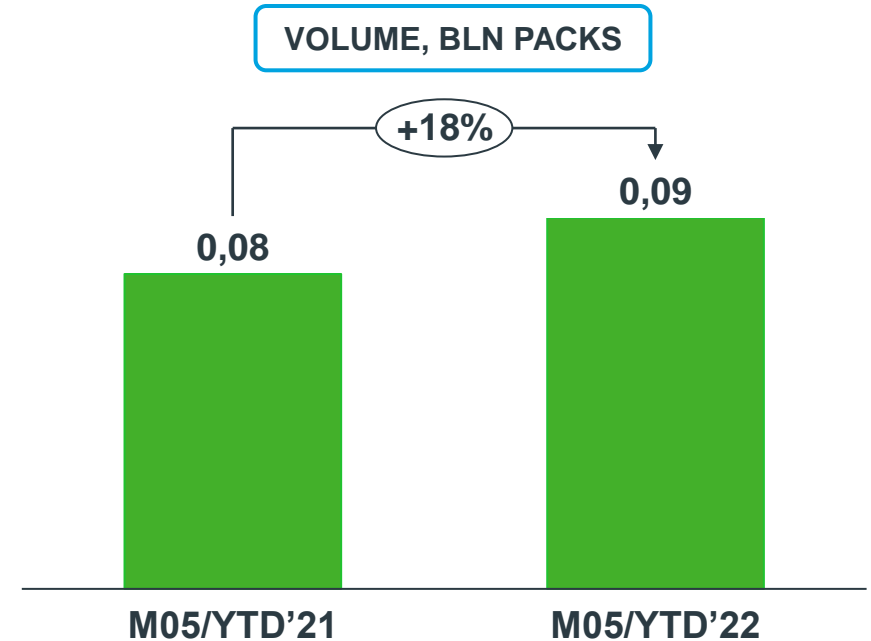
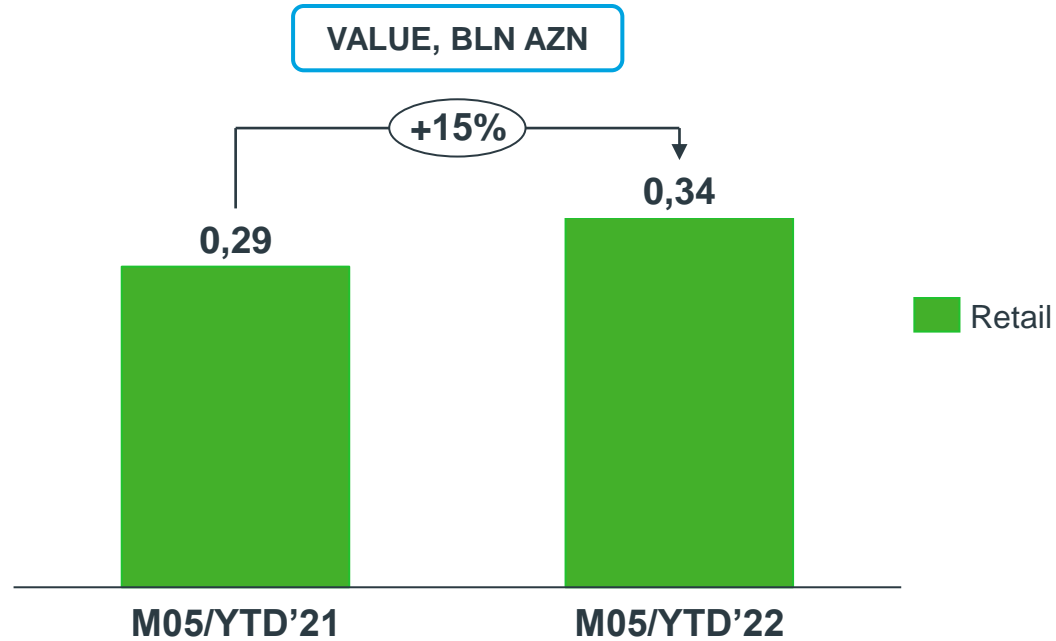
12,6%



INFLATION

# Azerbaijan pharma market growth in May 2022

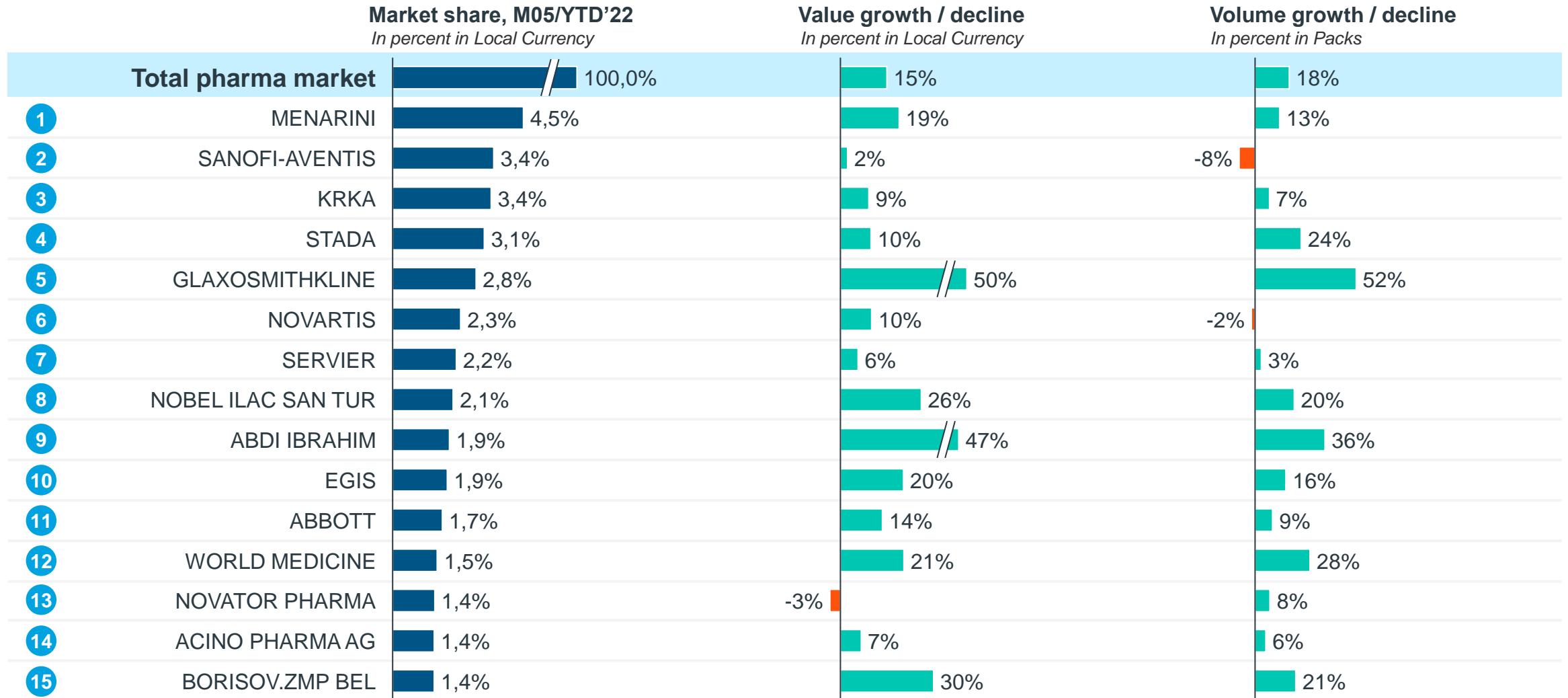
Market grew by 15% in value and 18% in volume



Indicator	AZN	USD	EUR	PACKS
Value M05/YTD'22, Bln.	0,34	0,20	0,18	0,09
Growth M05/YTD'22, %	▲ 15%	▲ 15%	▲ 26%	▲ 18%

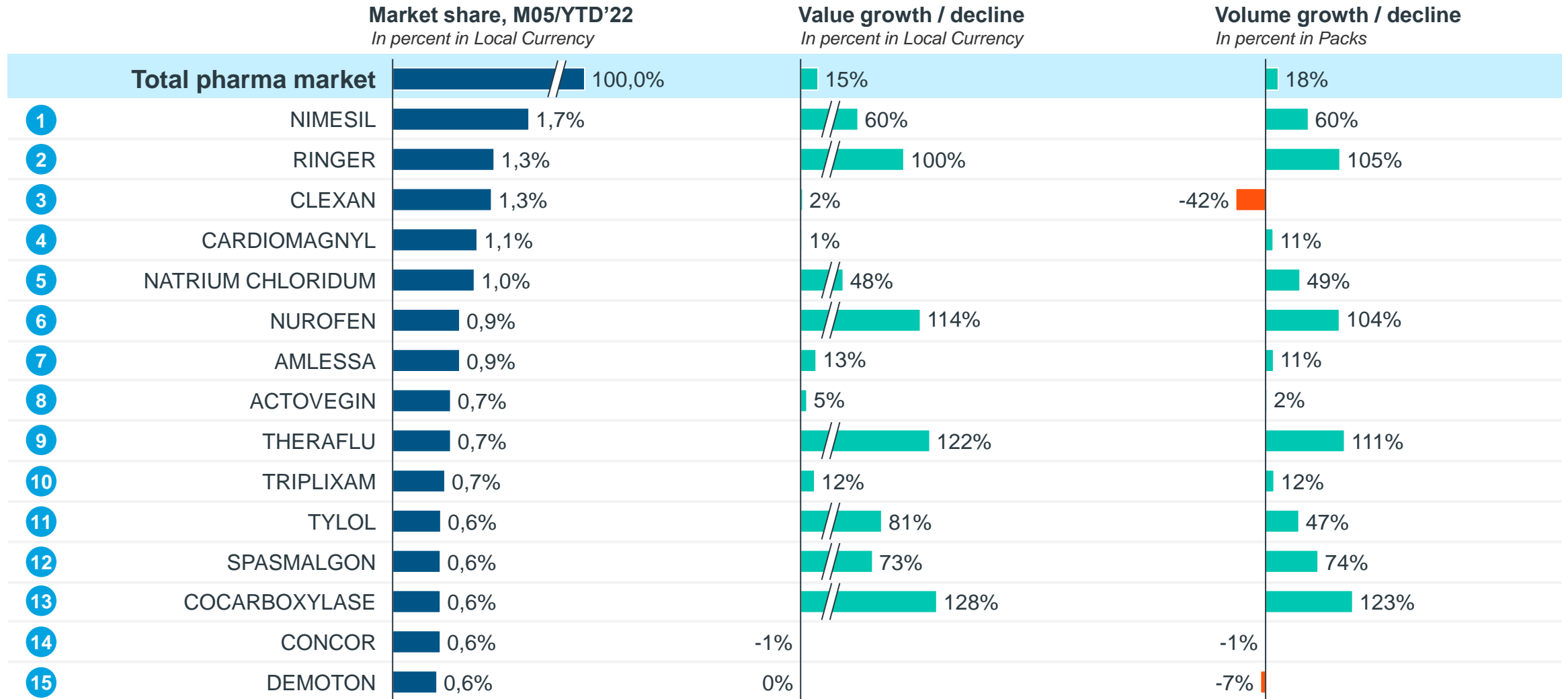


# TOP-15 corporations on Azerbaijan market, May 2022





# TOP-15 brands on Azerbaijan market, May 2022



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