



Facts from IQVIA

M08 2022

Russian pharma market growth in August 2022

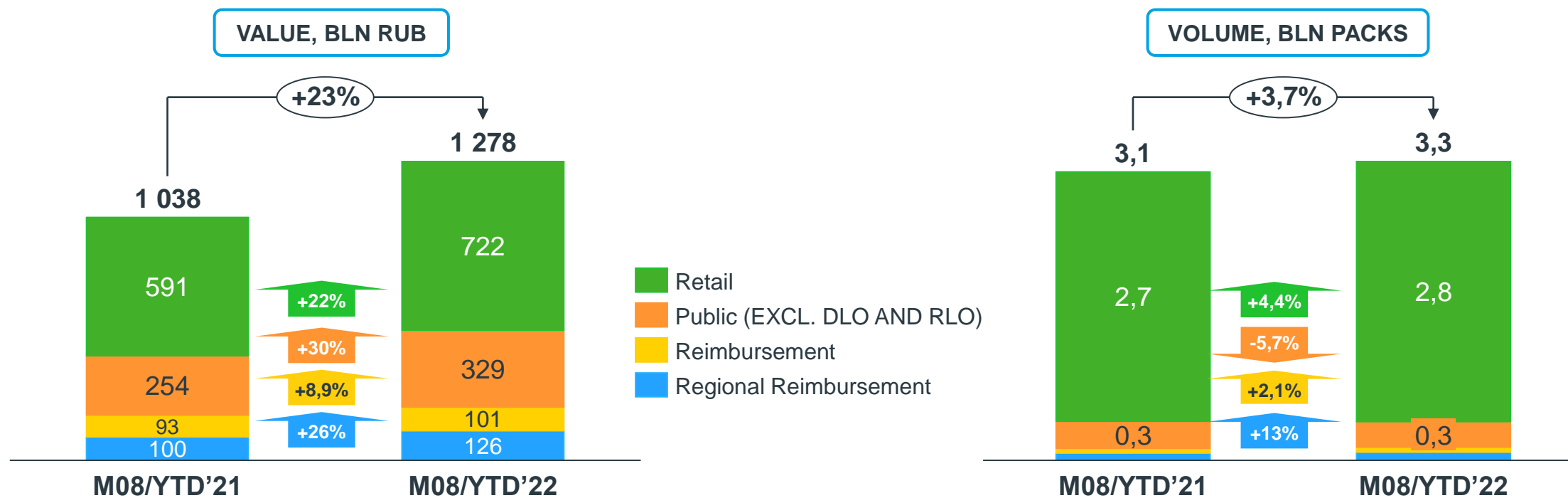
Market grew by 23% in value and 4% in volume



14,3%



INFLATION



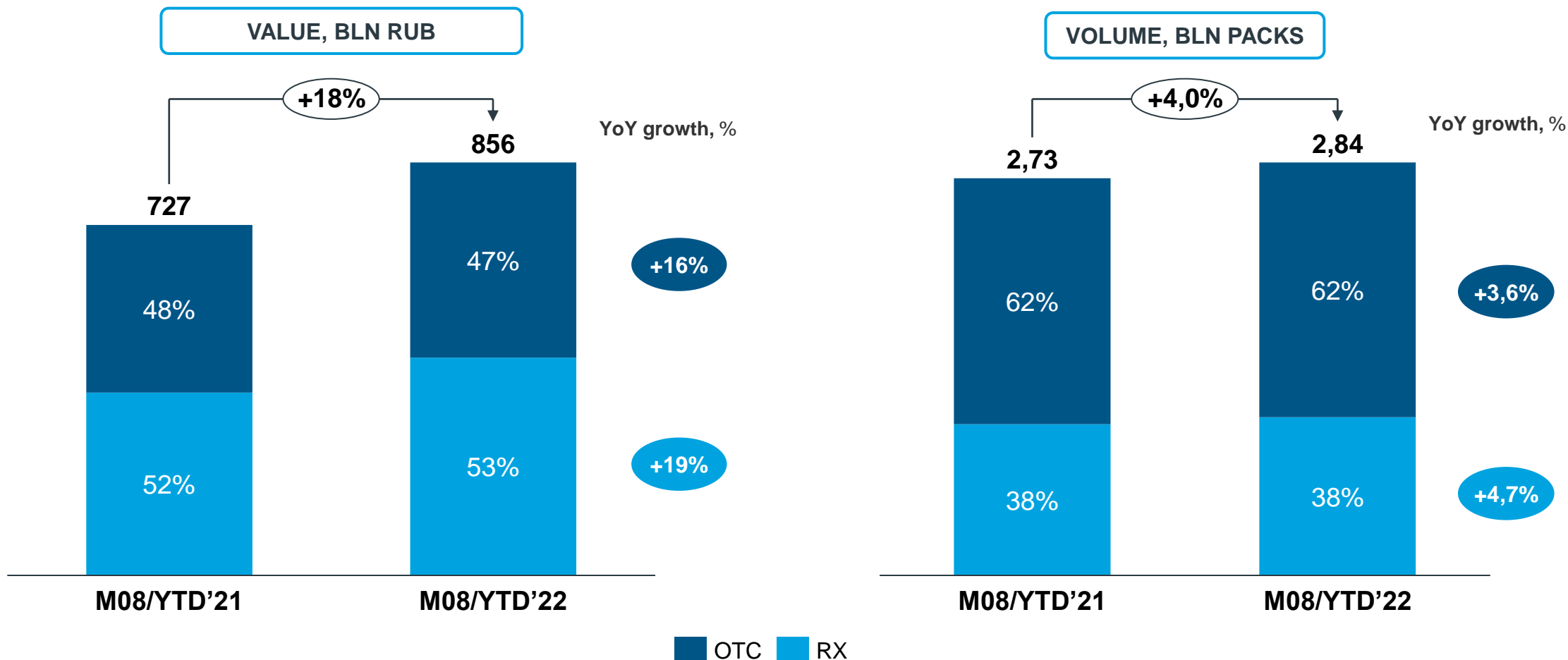
Indicator	RUB	USD	EUR	PACKS
Value M08/YTD'22, Bln.	1 278	18,1	17,0	3,3
Growth M08/YTD'22, %	▲ 23%	▲ 29%	▲ 45%	▲ 3,7%

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

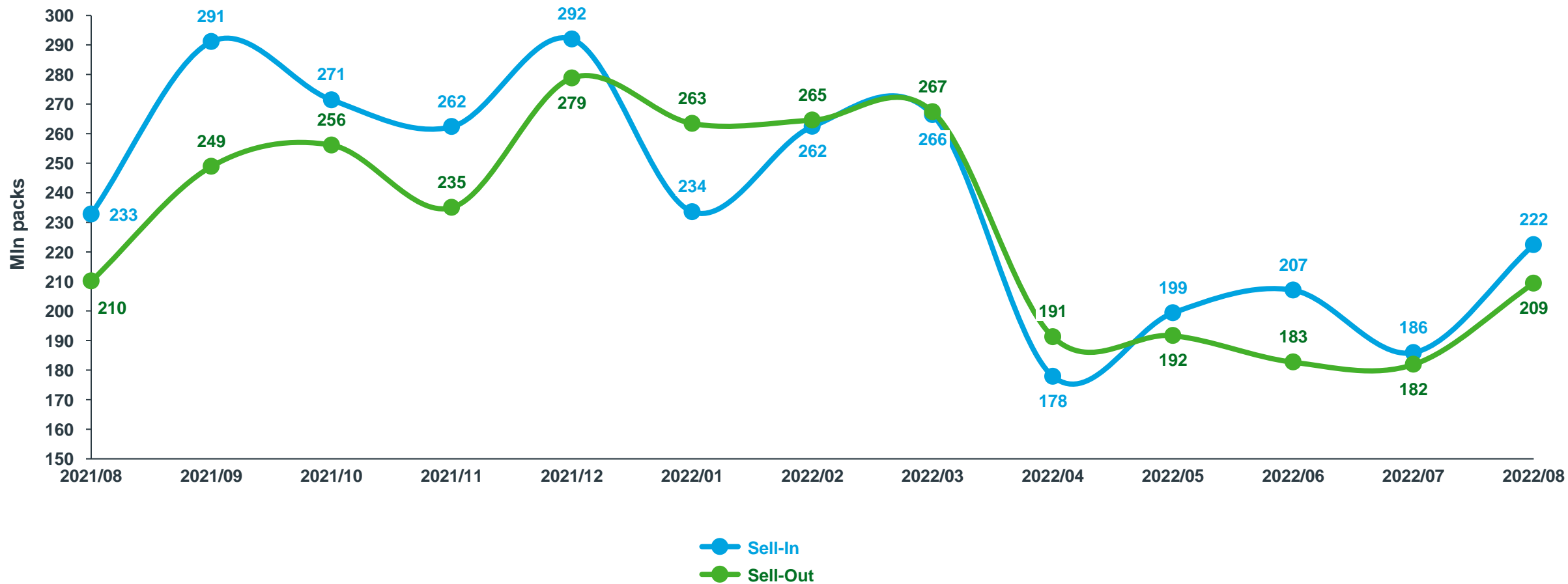
Russian pharma market growth in August 2022



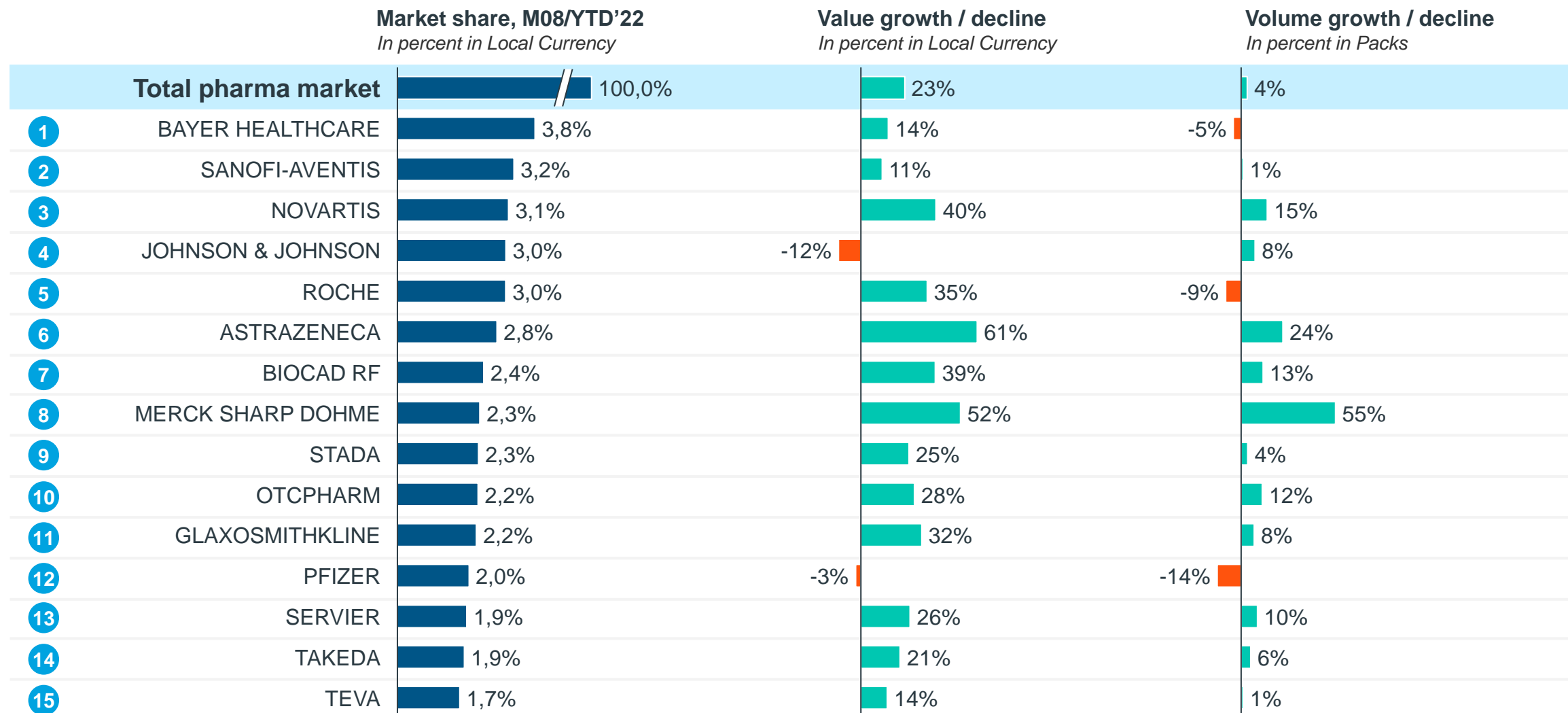
Retail Sell-Out: Market grew by 18% in value and 4% in volume



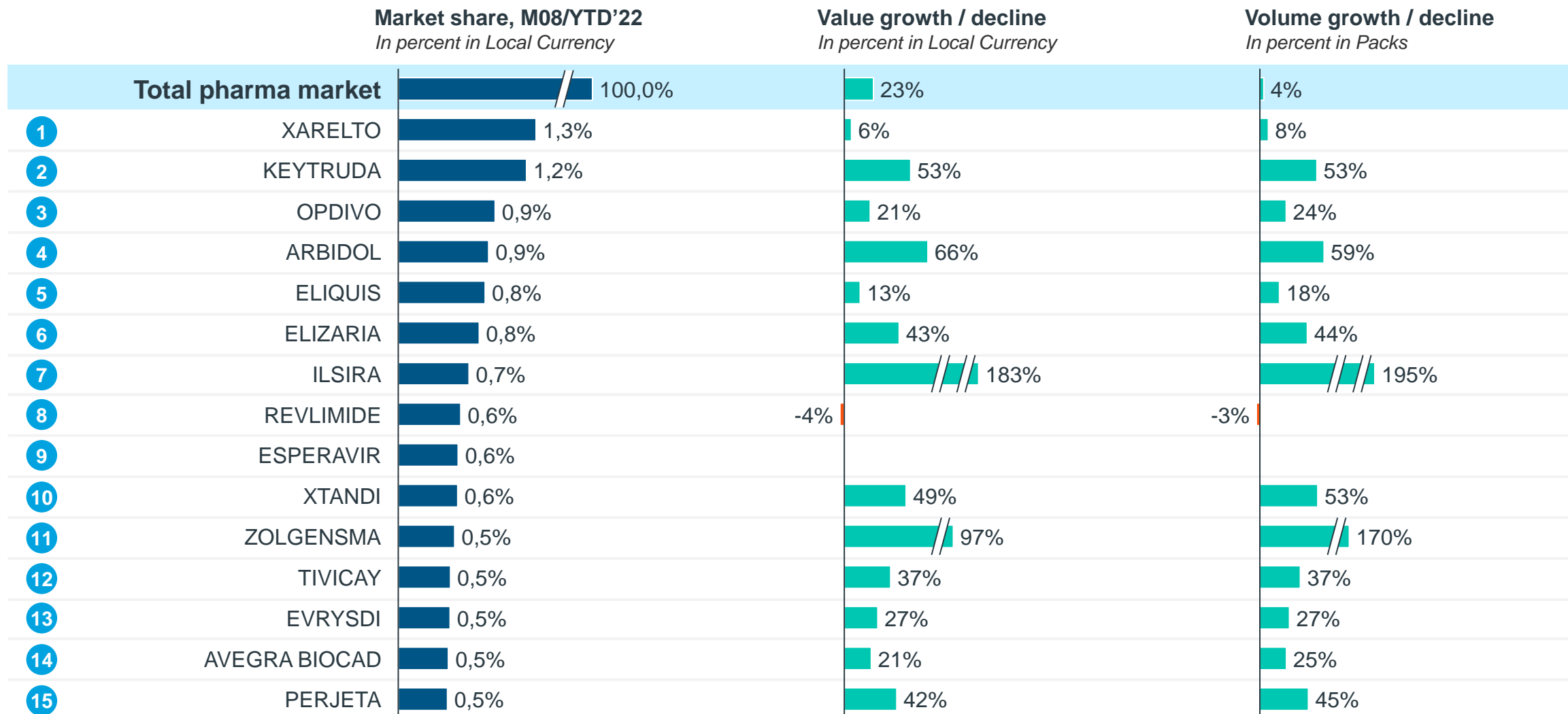
Sell-In vs Sell-Out, OTC registered drugs



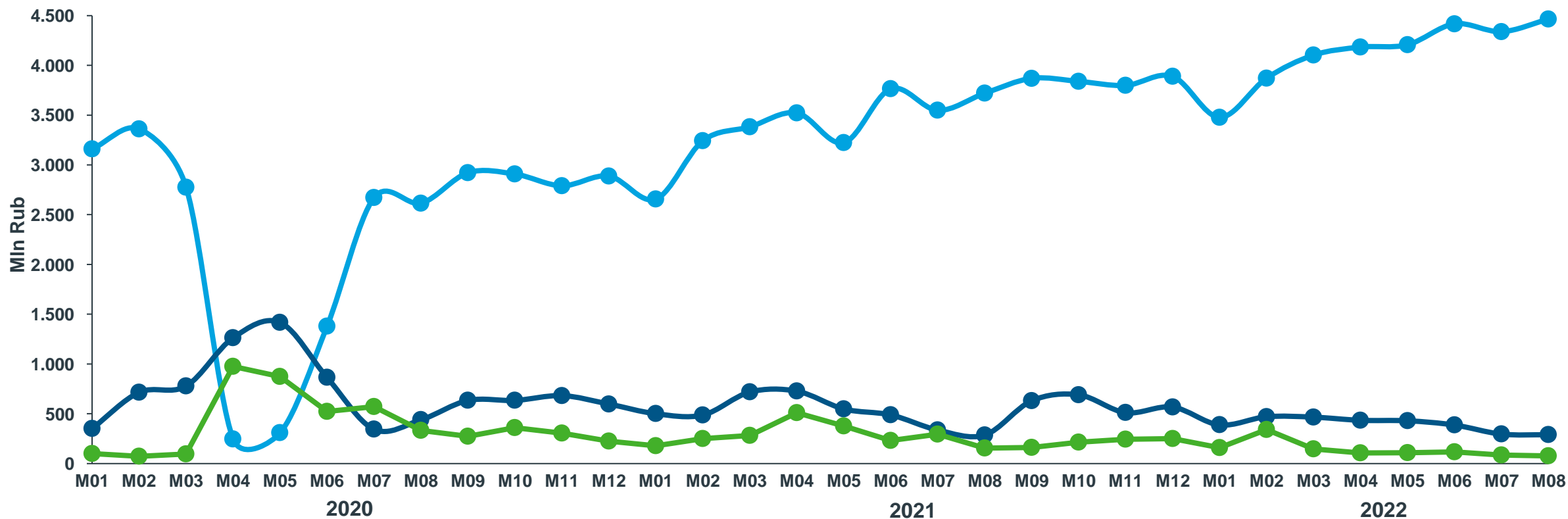
TOP-15 corporations on Russian market, August 2022



TOP-15 brands on Russian market, August 2022



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

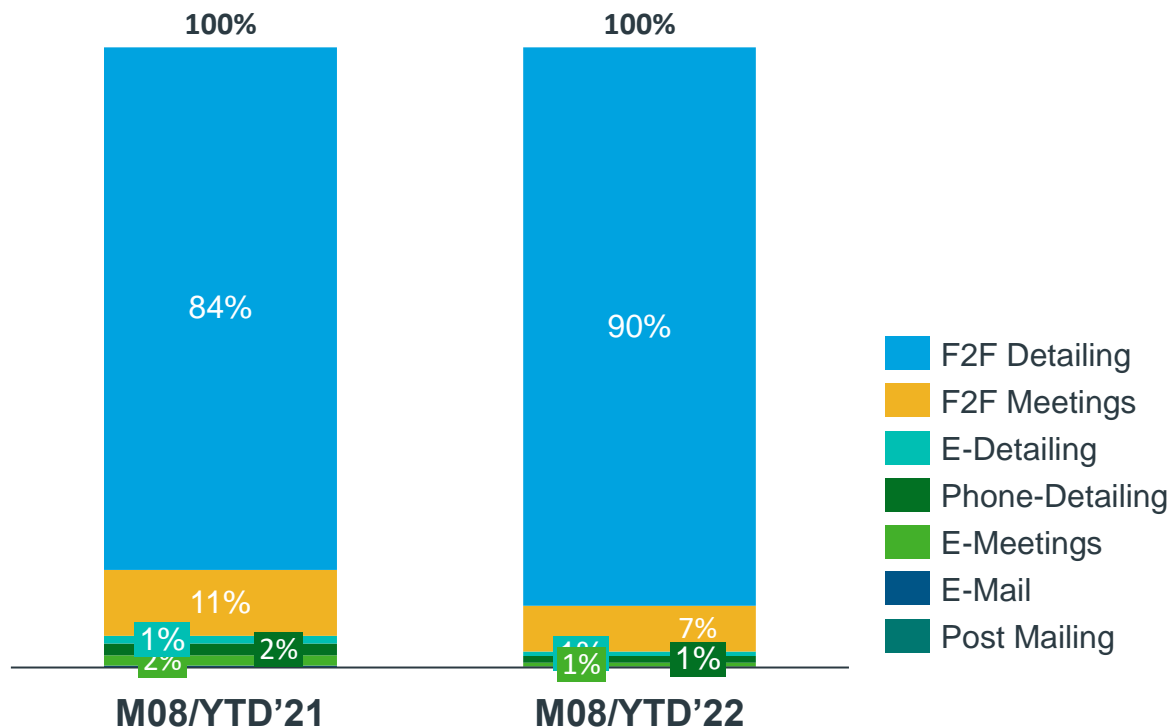


Value – a cost of each interaction projected on doctor’s universe

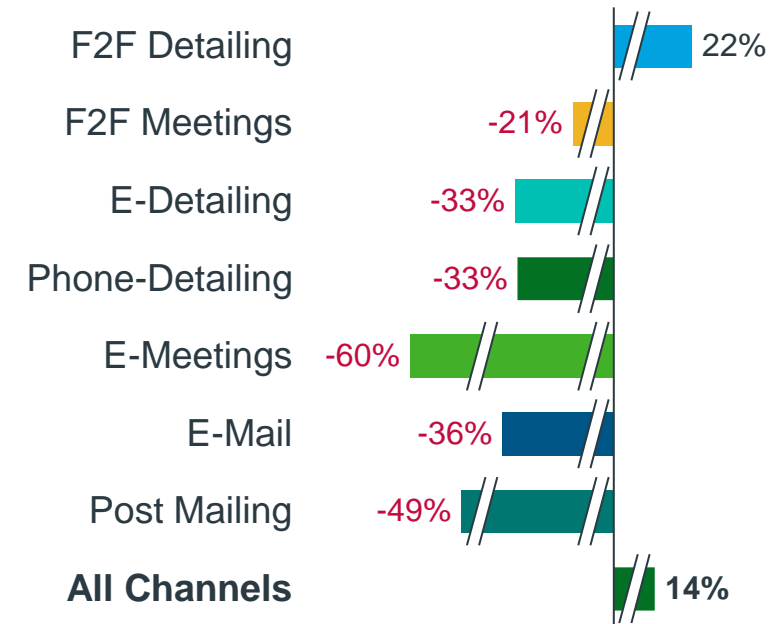
Total Market overall promotional value in Rub increased by 14%, YTD August 2022 vs 2021



Promotional value in Rub share by channel



% Changes in promotional value in Rub by channel YTD August 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

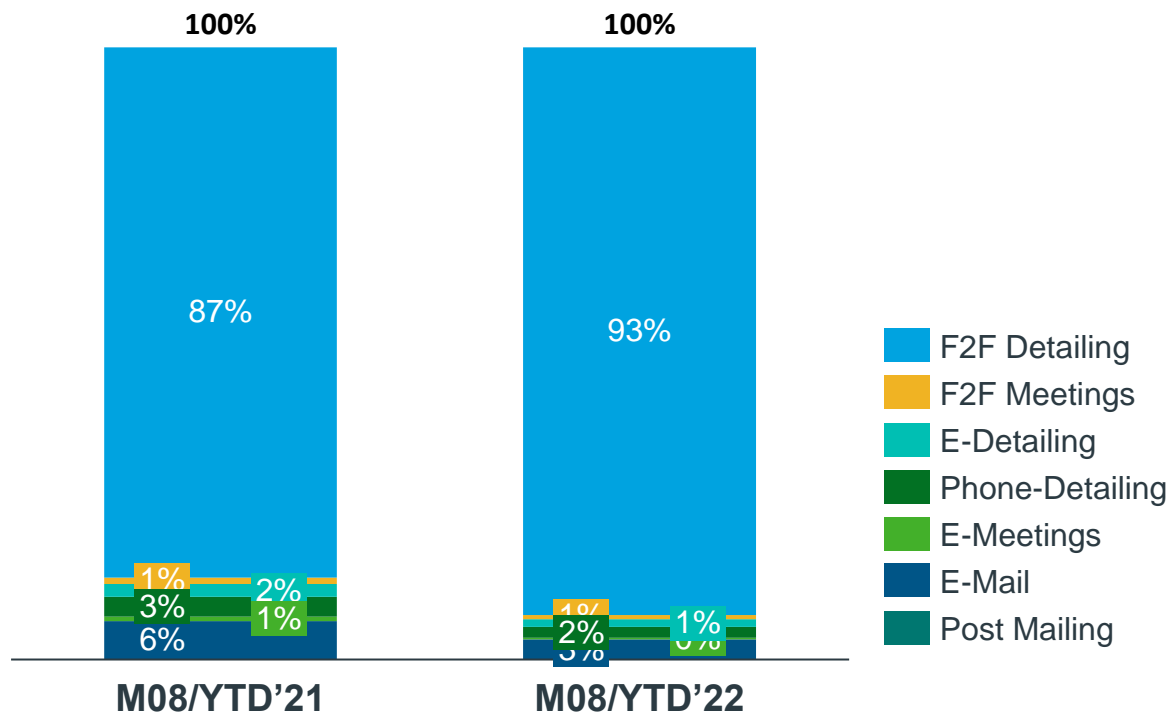
Value – a cost of each interaction projected on doctor’s universe

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.

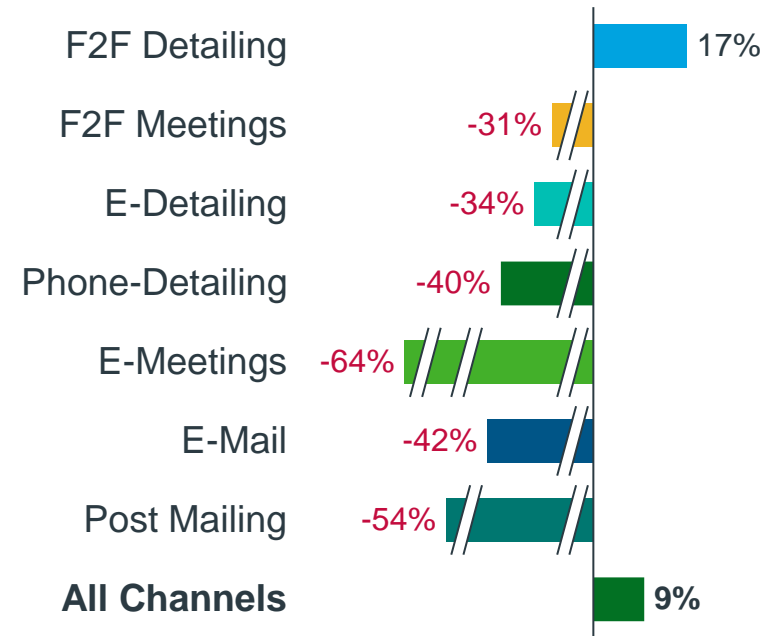
Total Market overall promotional volume (contacts) increased by 9%, YTD August 2022 vs 2021



Promotional value in Rub share by channel



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



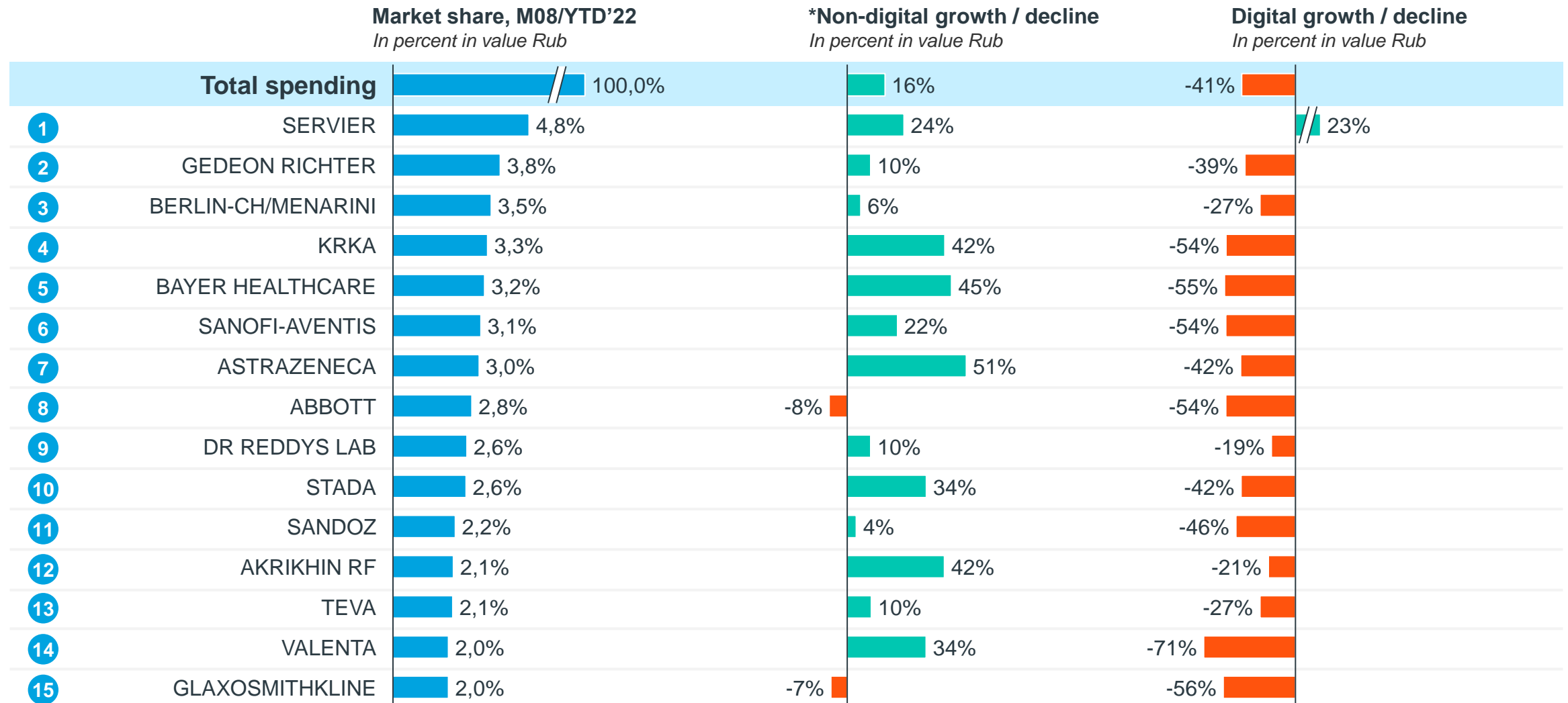
F2F Detailing – Reps visits. **Traditional others:** 1) F2F meetings – group meetings, round tables etc, 2) Phone Detailing – phone calls, 3) E-mail – communication via email. 4) Post Mailing – paper mails. **Digital:** 1) E-detailing – 1-1 calls visits using digitabl platforms 2) E-meetings – group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

Kazakhstan pharma market growth in August 2022

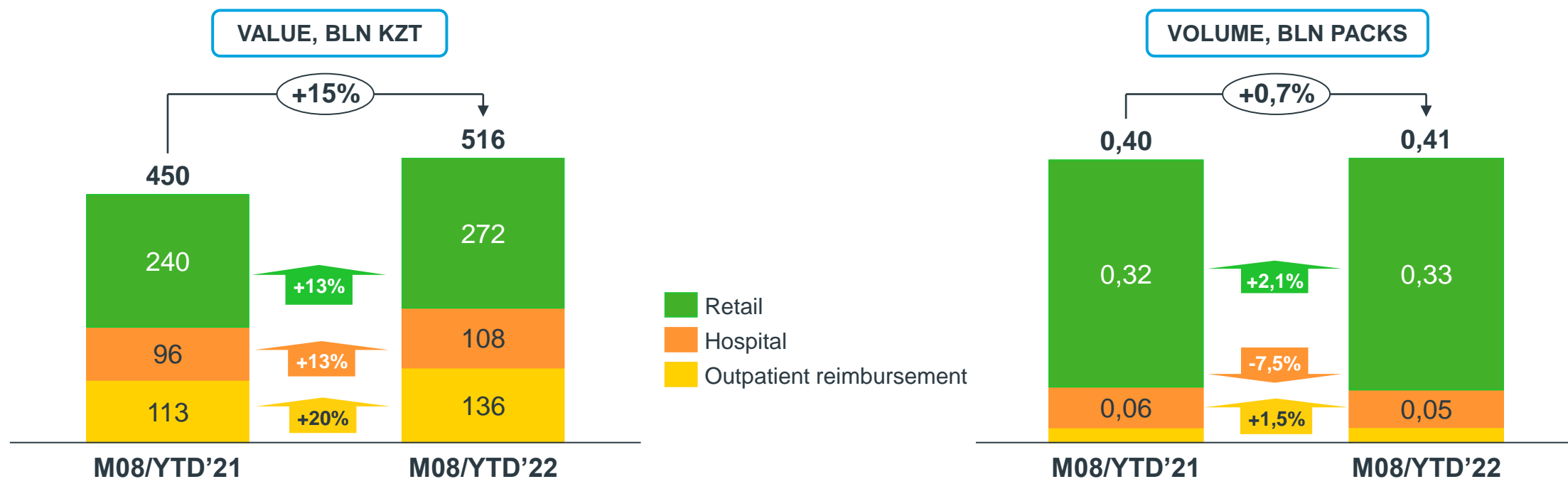
Market grew by 15% in value and 1% in volume



16,1%



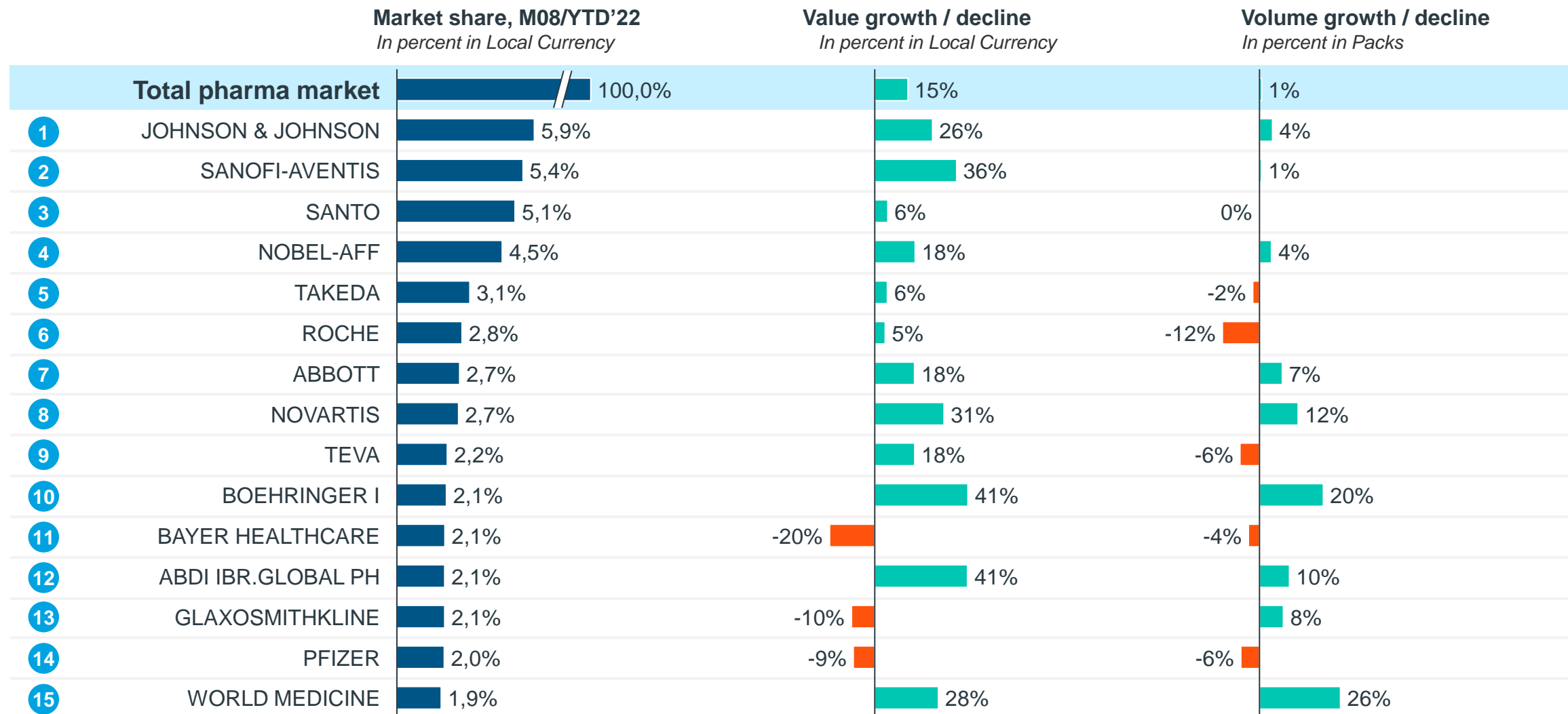
INFLATION



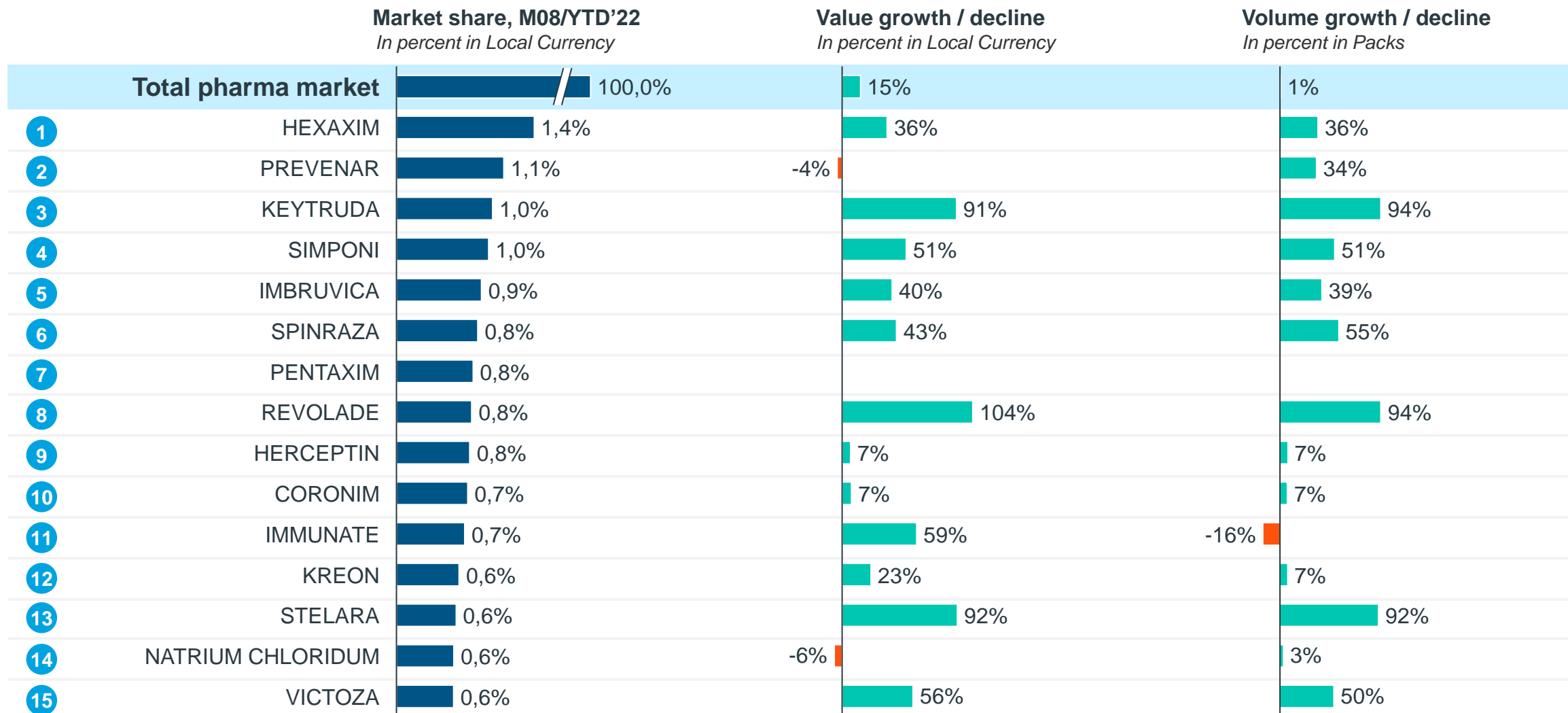
Indicator	KZT	USD	EUR	PACKS
Value M08/YTD'22, Bln.	516	1,13	1,05	0,41
Growth M08/YTD'22, %	▲ 15%	▲ 6,4%	▲ 19%	▲ 0,7%

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, August 2022



TOP-15 brands on Kazakhstan market, August 2022



Belarus pharma market decrease in August 2022

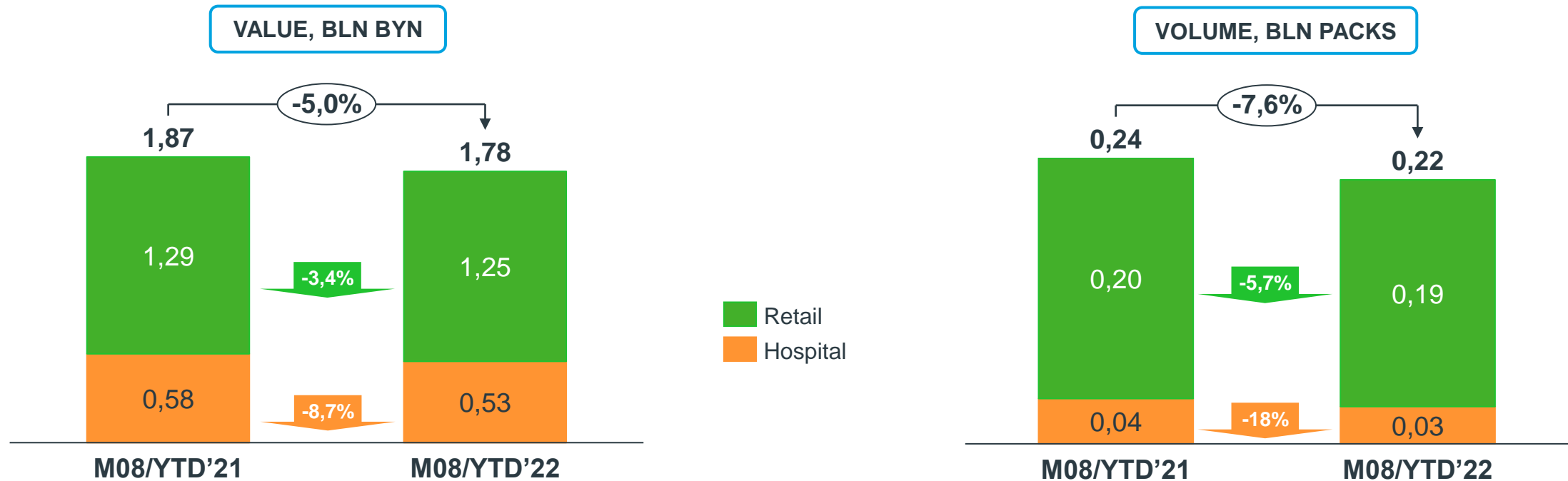
Market dropped by -5% in value and by -8% in volume



17,9%



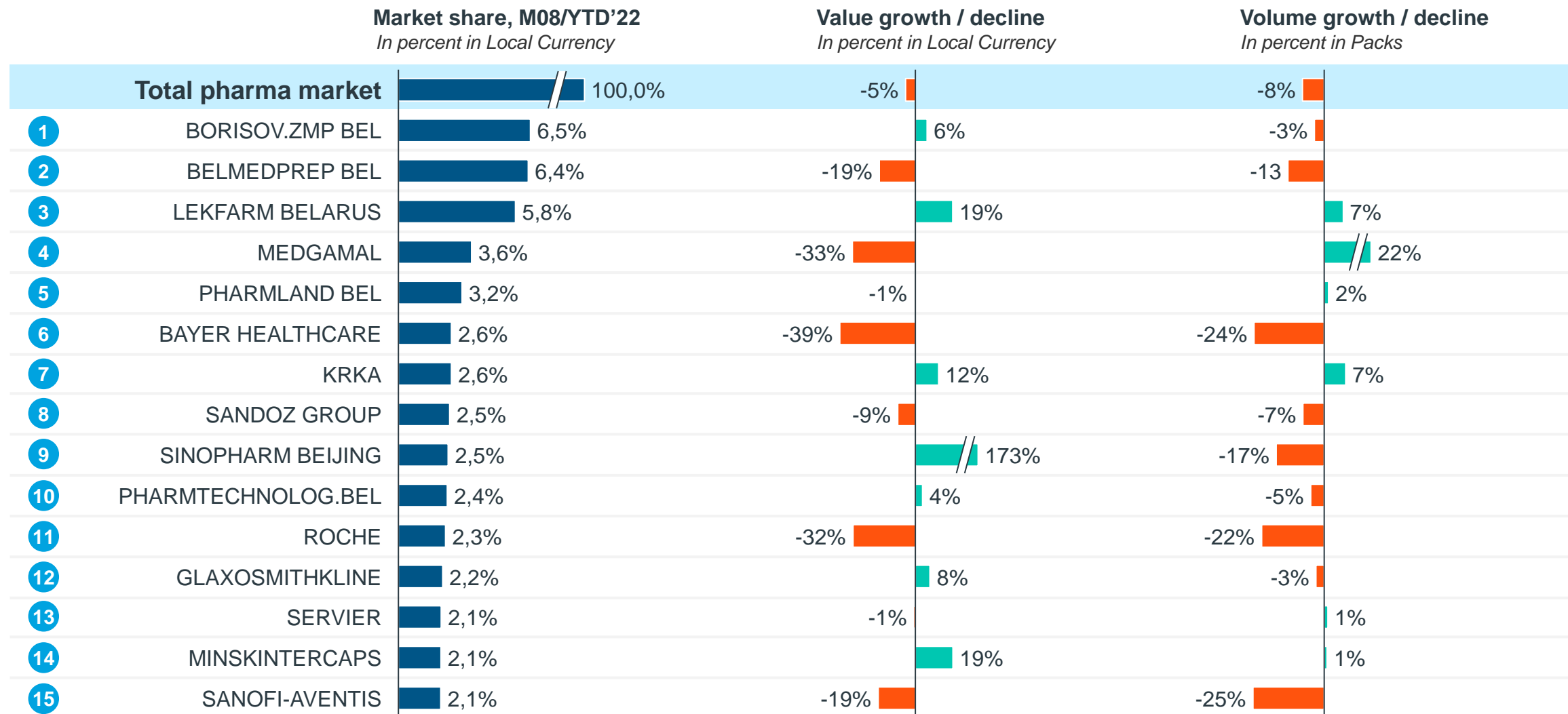
INFLATION



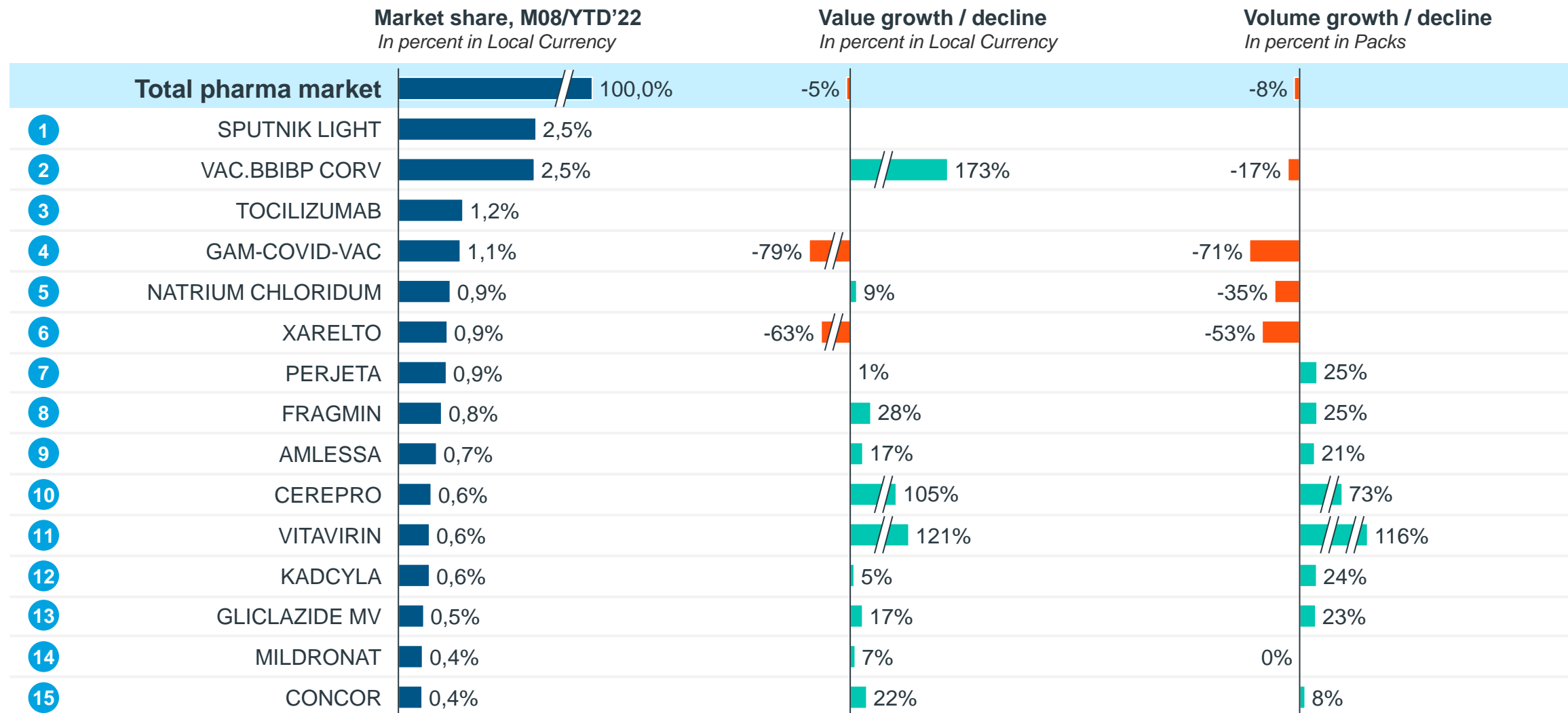
Indicator	BYN	USD	EUR	PACKS
Value M08/YTD'22, Bln.	1,78	0,66	0,62	0,22
Growth M08/YTD'22, %	▼ -5,0%	▼ -9,3%	▲ 1,3%	▼ -7,6%

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, August 2022



TOP-15 brands on Belarus market, August 2022



Uzbekistan pharma market growth in August 2022

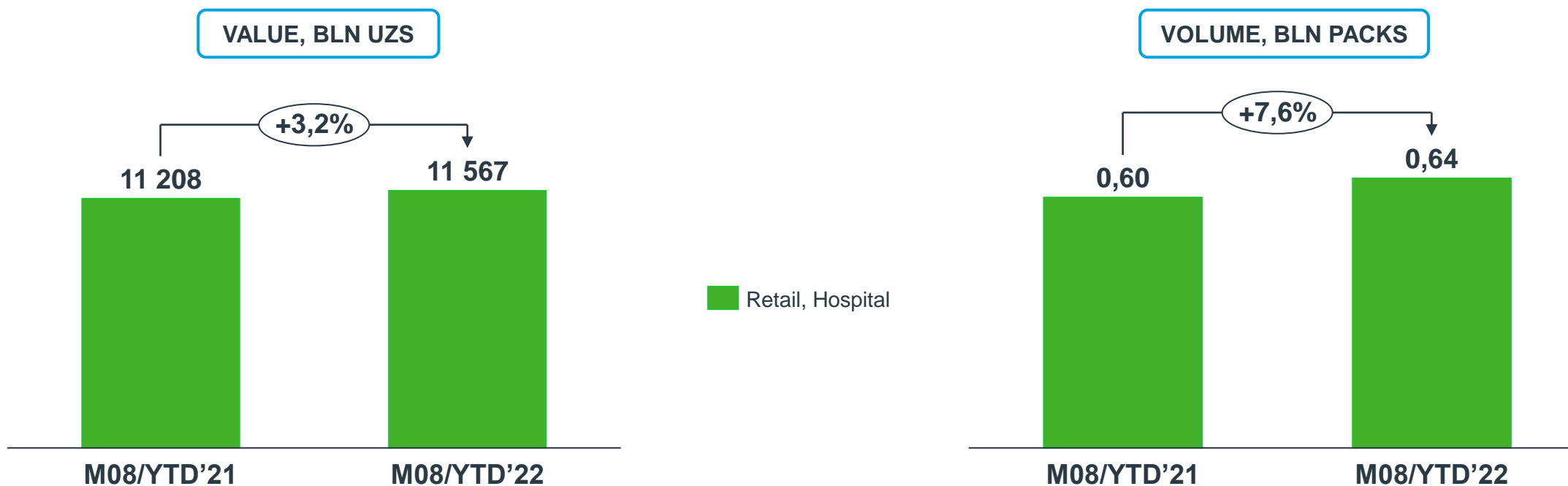
Market grew by 3% in value and 8% in volume



12,3%

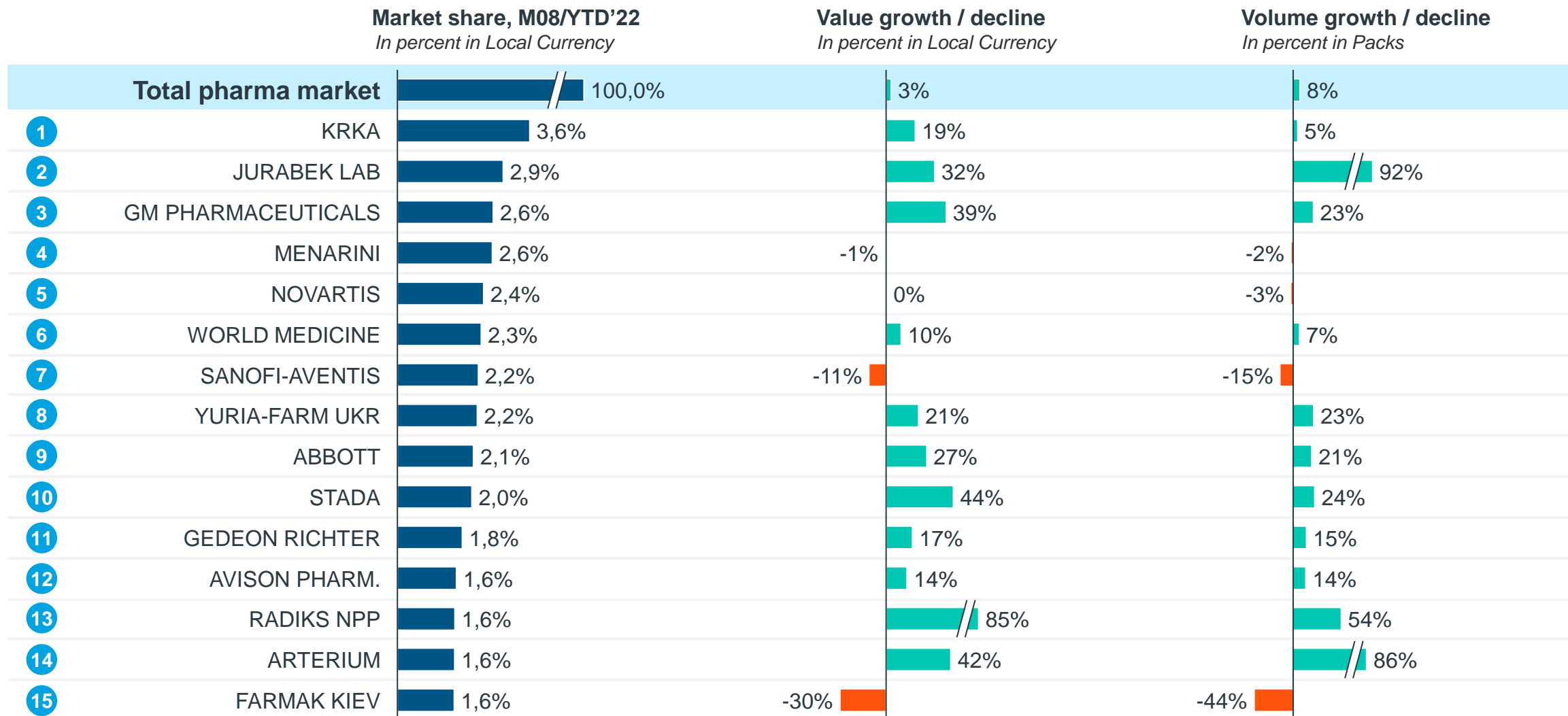


INFLATION



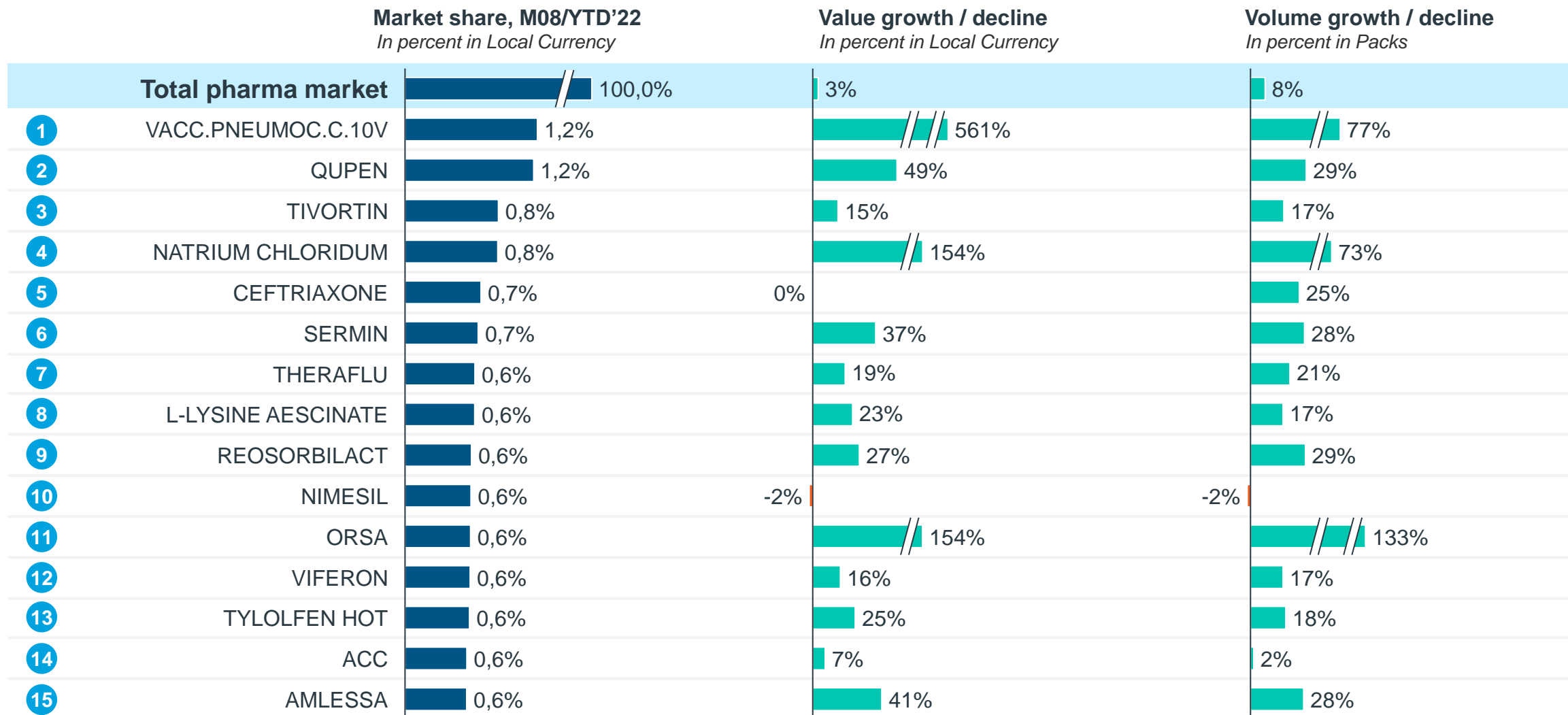
Indicator	UZS	USD	EUR	PACKS
Value M08/YTD'22, Bln.	11 567	1,05	0,98	0,64
Growth M08/YTD'22, %	▲ 3,2%	▼ -0,9%	▲ 10%	▲ 7,6%

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



Armenia pharma market growth in August 2022

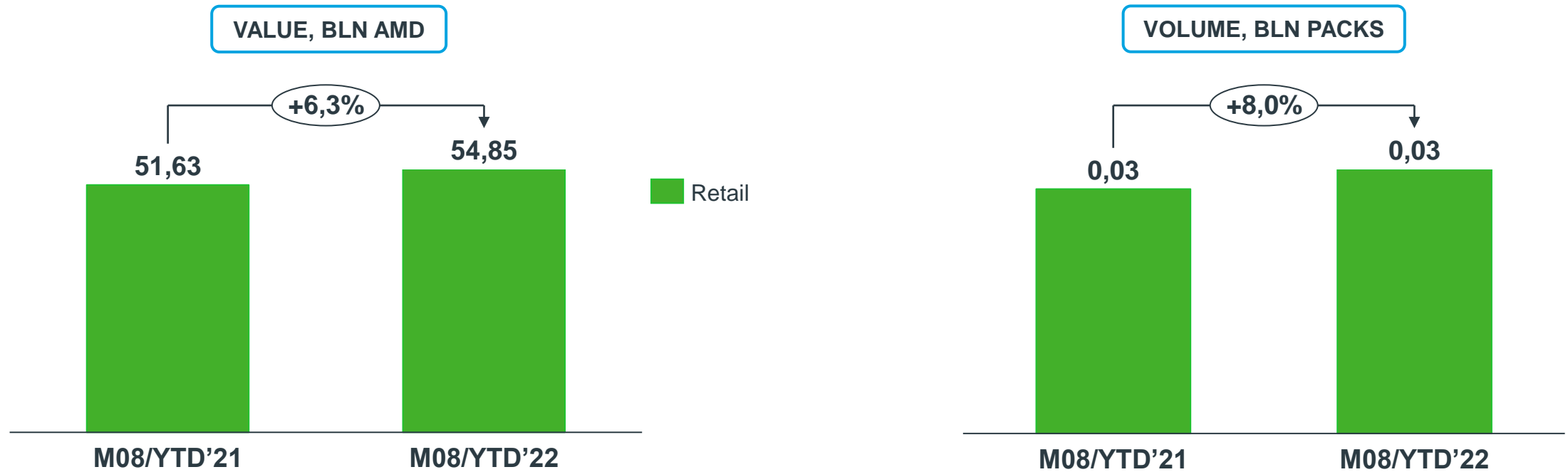
Market grew by 6% in value and by 8% in volume



9,1%

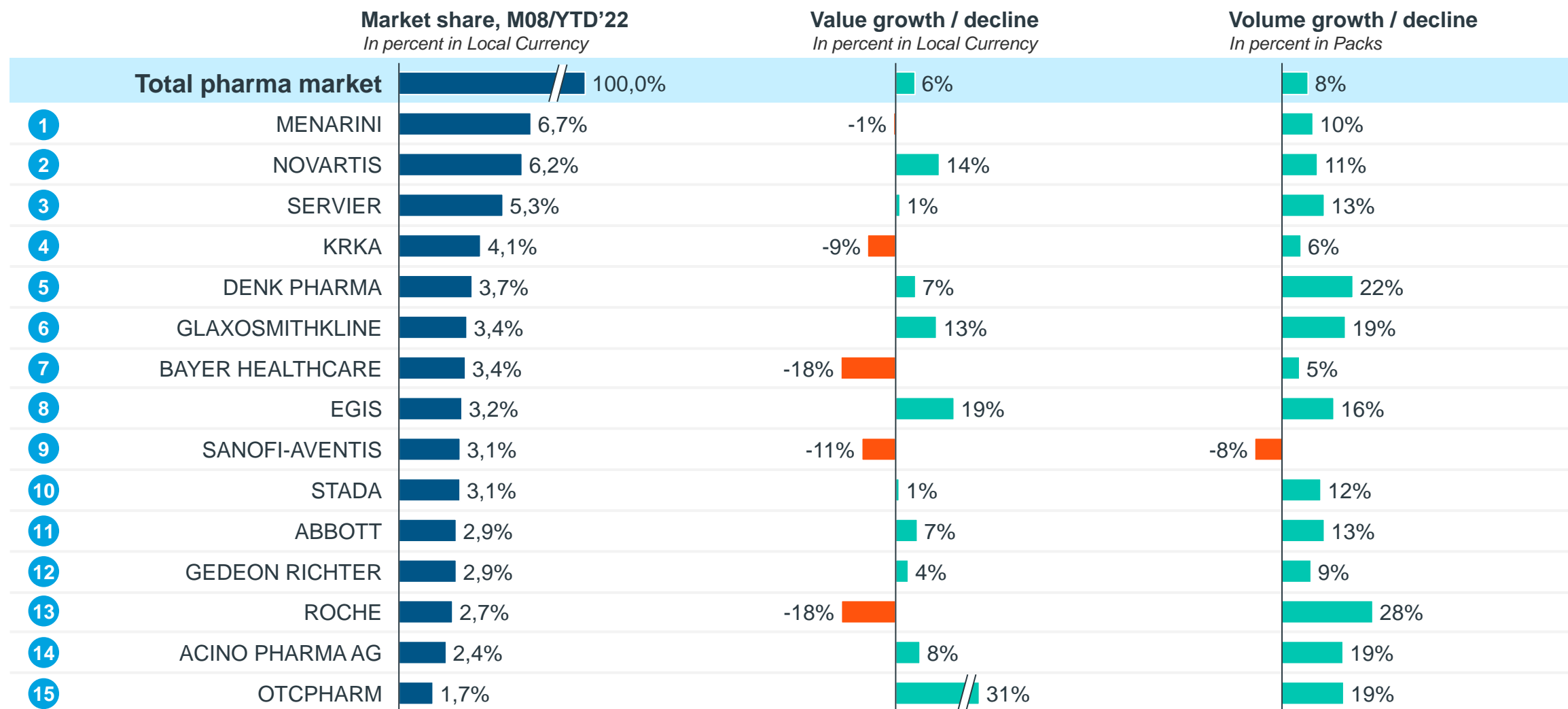


INFLATION

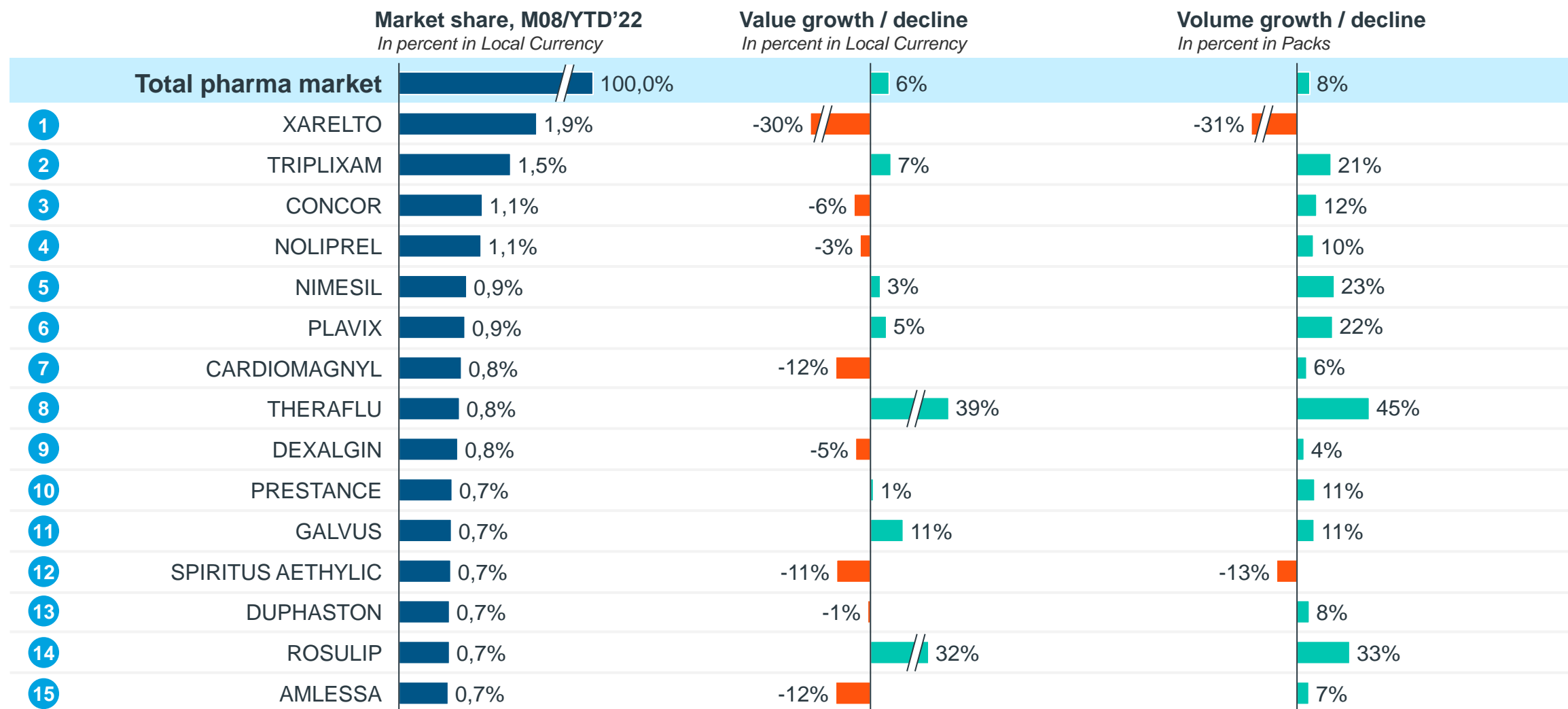


Indicator	AMD	USD	EUR	PACKS
Value M08/YTD'22, Bln.	54,9	0,12	0,11	0,03
Growth M08/YTD'22, %	▲ 6,3%	▲ 21%	▲ 36%	▲ 8,0%

TOP-15 corporations on Armenia market, August 2022



TOP-15 brands on Armenia market, August 2022



Georgia pharma market growth in August 2022

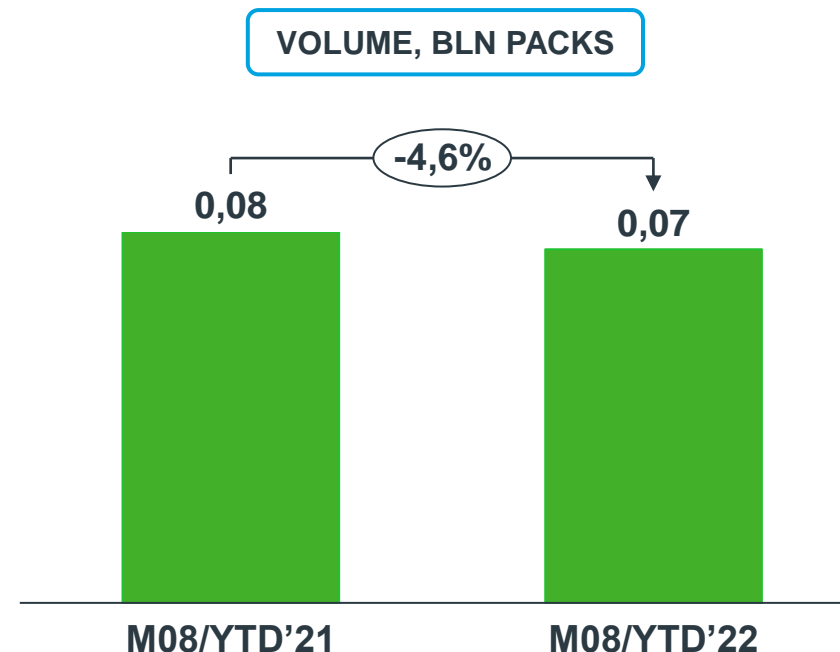
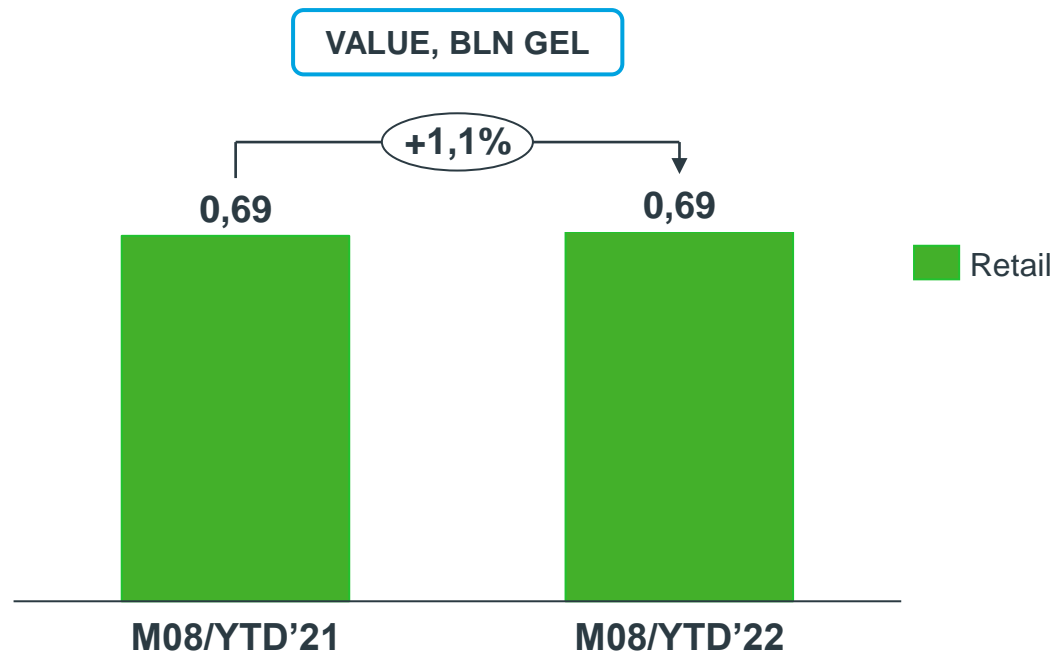
Market grew by 1% in value and dropped by 5% in volume



10,9%

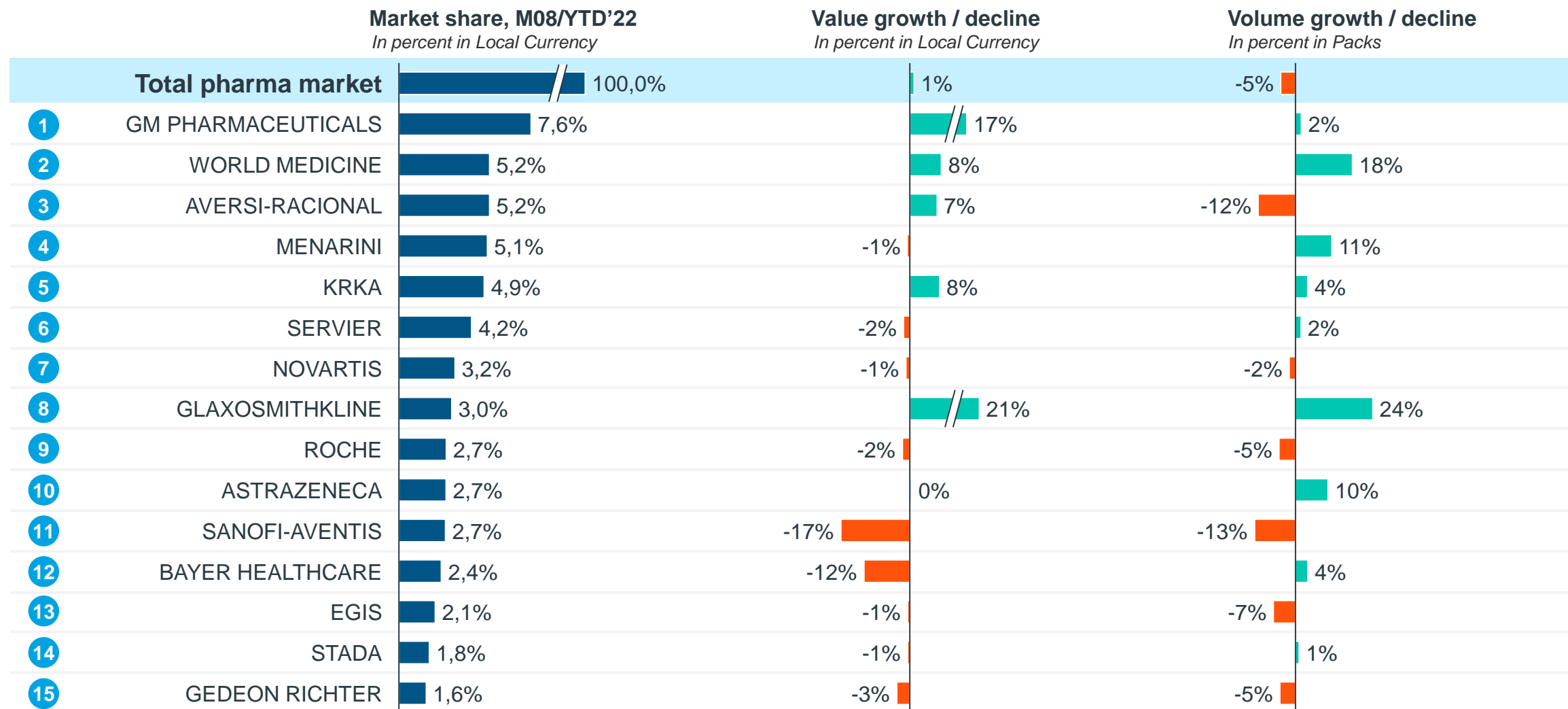


INFLATION

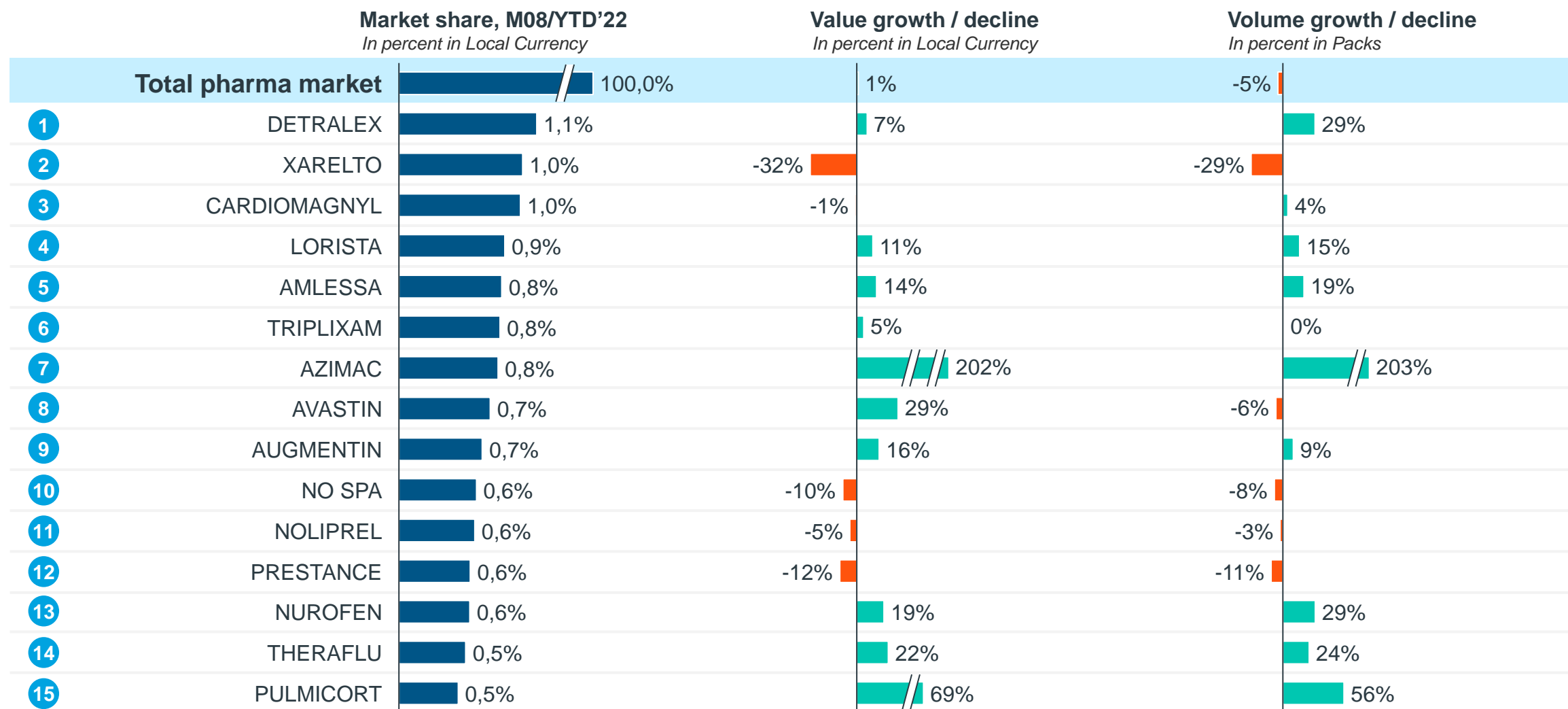


Indicator	GEL	USD	EUR	PACKS
Value M08/YTD'22, Bln.	0,7	0,23	0,22	0,07
Growth M08/YTD'22, %	▲ 1,1%	▲ 10%	▲ 23%	▼ -4,6%

TOP-15 corporations on Georgia market, August 2022



TOP-15 brands on Georgia market, August 2022



Azerbaijan pharma market growth in August 2022

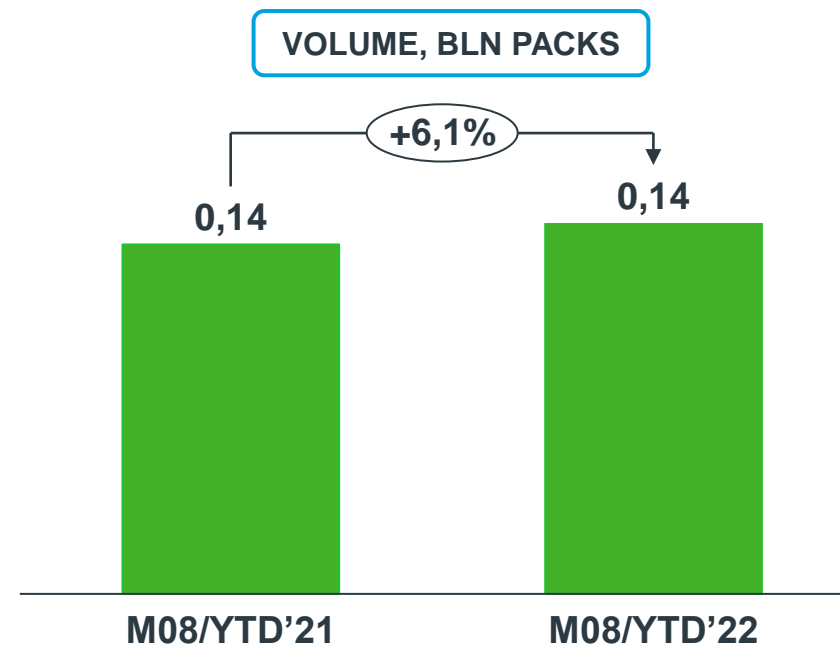
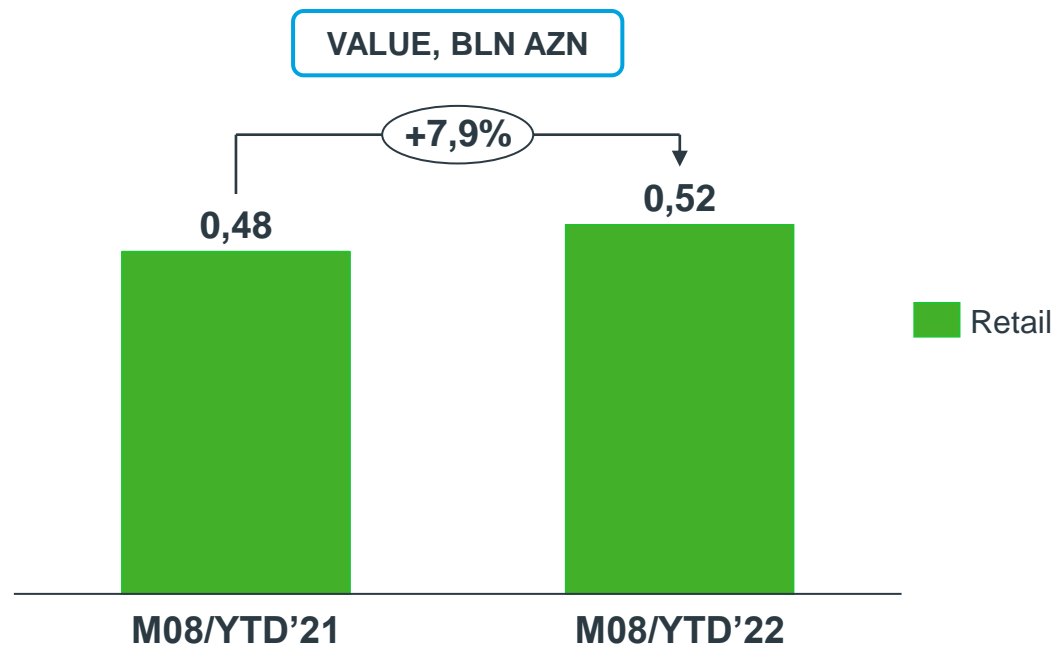
Market grew by 8% in value and 6% in volume



14,2%

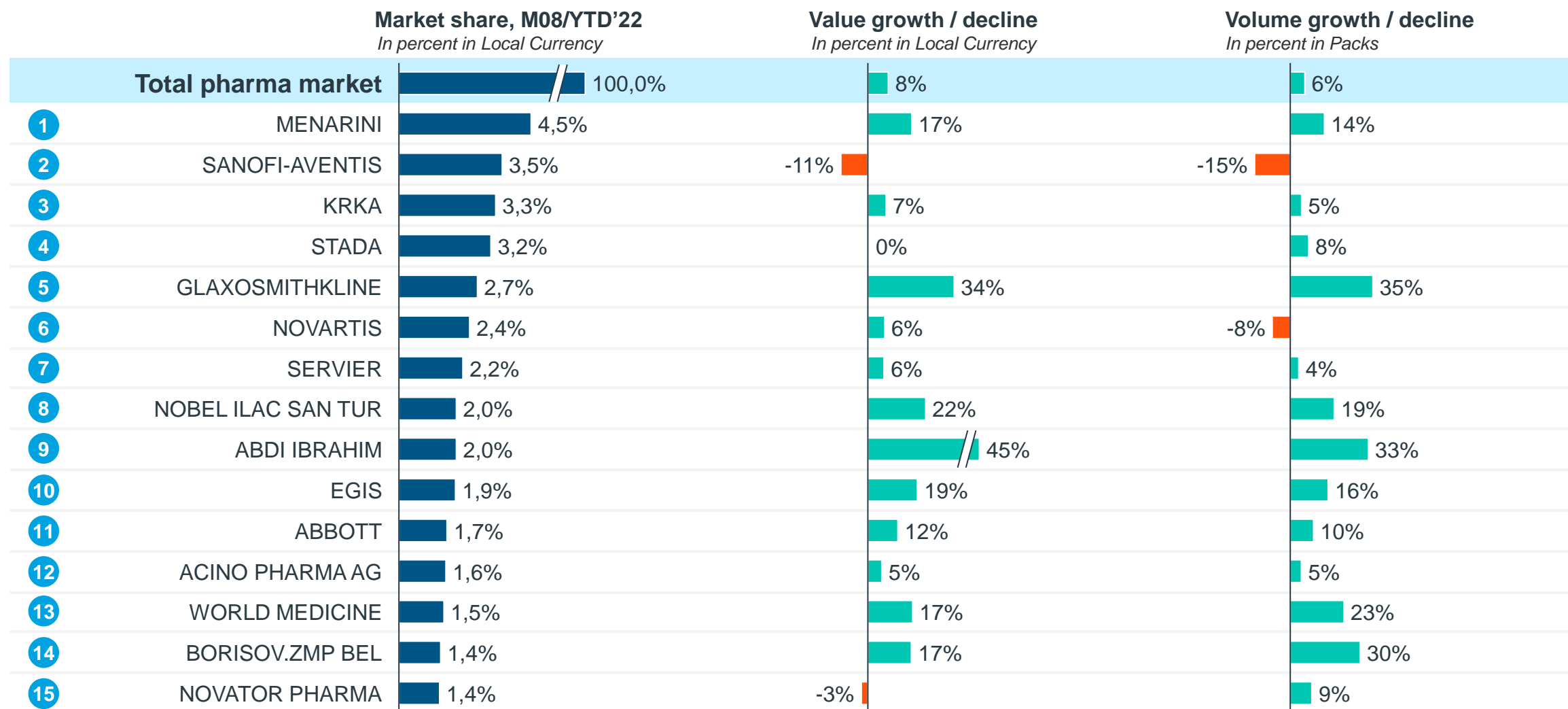


INFLATION

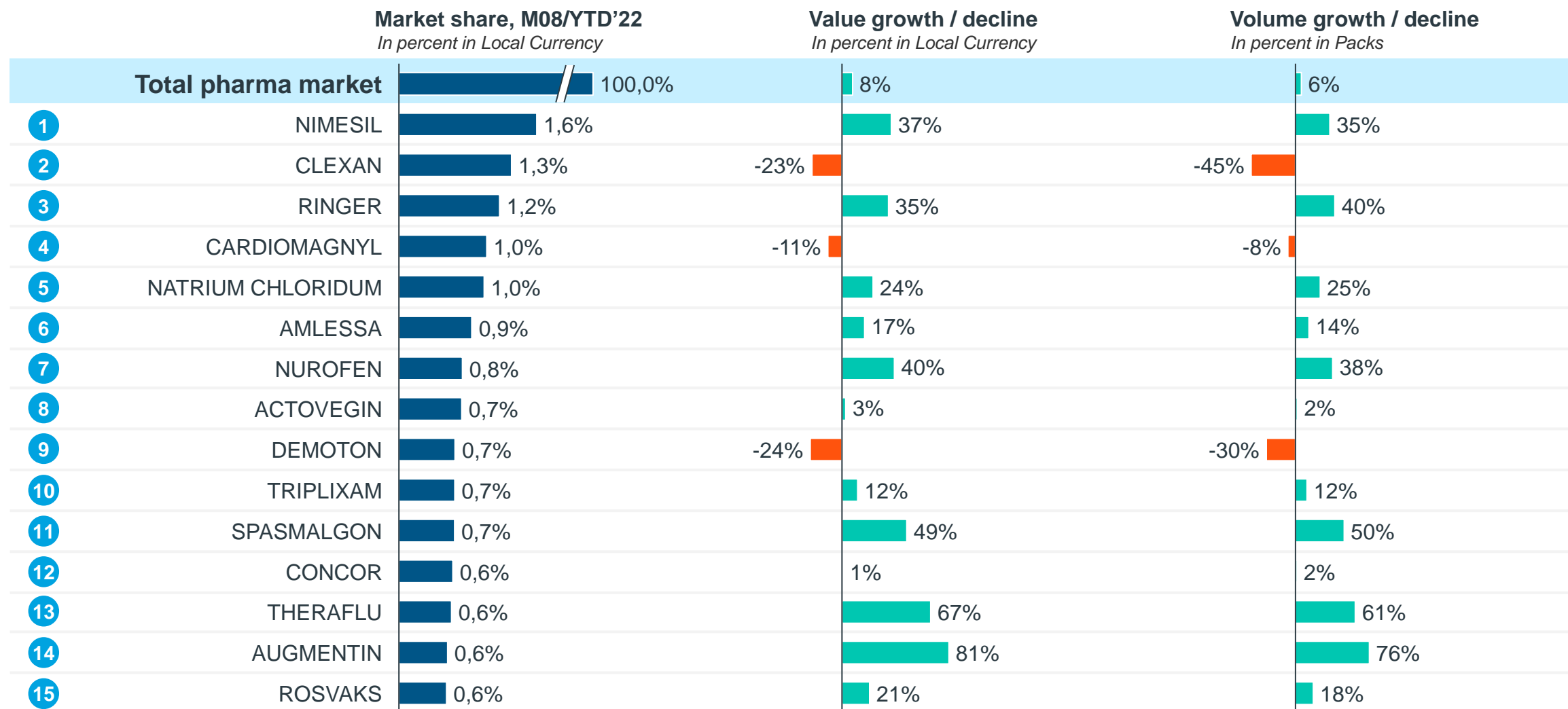


Indicator	AZN	USD	EUR	PACKS
Value M08/YTD'22, Bln.	0,52	0,31	0,28	0,14
Growth M08/YTD'22, %	▲ 7,9%	▲ 7,9%	▲ 20%	▲ 6,1%

TOP-15 corporations on Azerbaijan market, August 2022



TOP-15 brands on Azerbaijan market, August 2022



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