

FACTS from IQVIA | March 2023

Delivering solutions to drive healthcare forward

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The following definitions are used in the existing IQVIA report

Disclaimer

TIME PERIOD



Analyzed period of this report:

- April 2022 – March 2023

We apply MAT (Moving Annual Total) for comparison analysis

YoY: year over year growth

CAGR: compound annual growth rate

VALUES



VALUE – Rubles

VOLUME – Packs

Trade price (sell-in to pharmacies and hospitals)

MARKET



Total pharma market (all product categories including Z98 food supplements)

Source (IQVIA audits):

- Retail audit of drugs in RF
- Public audit of drugs in RF (excluding DLO and RLO)
- RLO and DLO (excluding sales of ATC2 EphMRA2 groups T02, T03)

CHANNELS



Retail channel (out-of-pocket market)

State-funded channel (all products are reimbursed) covers Public, RLO, DLO

OTHERS

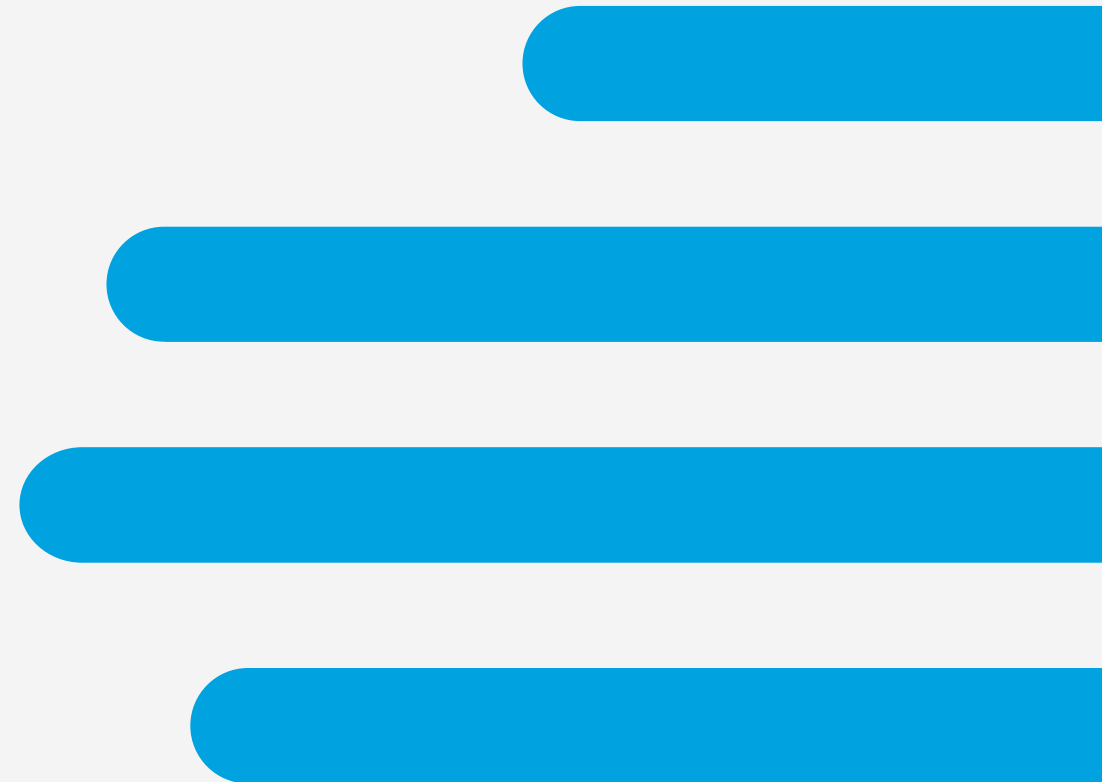


Ratings of pharma chains and distributors are updated on quarterly basis

Market forecast is derived from global IQVIA Market Prognosis which excludes Z98 category. Market Prognosis is updated twice per year – April and October

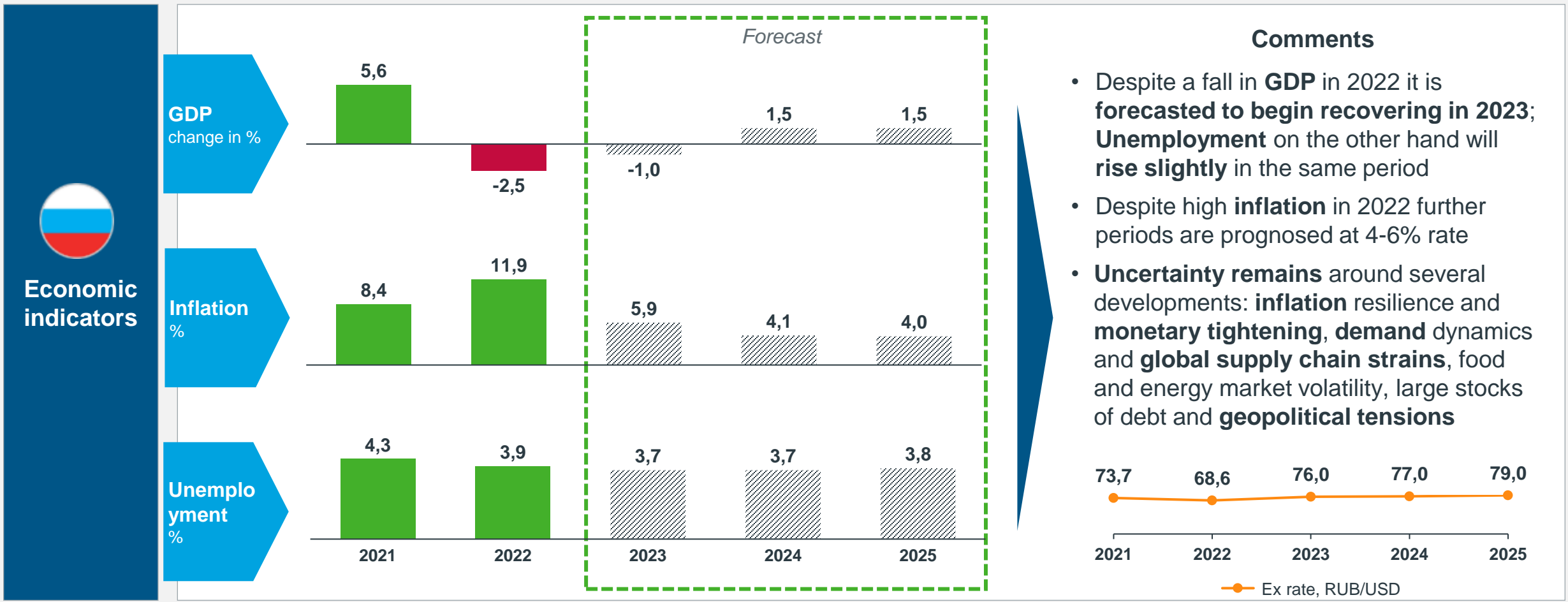
01

Economy & key regulatory changes



Russian GDP is forecasted at -1% level in 2023; inflation is likely to be stabilized with 76 RUB per 1 US\$ on annual average

Key economic indicators



- ### Comments
- Despite a fall in **GDP** in 2022 it is **forecasted to begin recovering in 2023**; **Unemployment** on the other hand will **rise slightly** in the same period
 - Despite high **inflation** in 2022 further periods are prognosed at 4-6% rate
 - **Uncertainty remains** around several developments: **inflation** resilience and **monetary tightening**, **demand** dynamics and **global supply chain strains**, food and energy market volatility, large stocks of debt and **geopolitical tensions**



Source: IQVIA analysis, [Макроэкономический опрос Банка России](#) | [Банк России \(cbr.ru\)](#)
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Electronic prescription service, reduction of prices of some antitumor drugs and state investments to develop local analogues

Key regulatory changes / news

Uniform electronic prescription service could be introduced within 18 months – Health Ministry

Russia's switch to the **uniform electronic prescription system is technologically possible within about 18 months** after this project is put on a legal footing and the related risks are properly assessed, the Russian health minister said.

in an interview with Russia 24 television.

The idea is that medicines prescribed to patients in one place will be administered in any other place, provided a prescription is submitted, he said.

“What needs to be done right now is to put the project on a legal footing, to take all opinions and risks into account, and to create guarantees of information security,” Murashko said.

Prices of some antitumor drugs go down in Russia – antimonopoly service

Prices for some **anti-tumor drugs have been cut by almost 86% in Russia**, including on the foreign drug Sutent (INN Sunitinib) and on four domestically developed generics, the Federal Antimonopoly Service (FAS) said in a statement.

Price reduction was due to consistent lowering of the registered prices for the foreign referential drug and to the antimonopoly service's approval of the price of a new domestically developed generic, the statement says. Price cuts will make these drugs more accessible to patients. Clinics will prescribe them for no cost under the national mandatory health insurance program, FAS said.

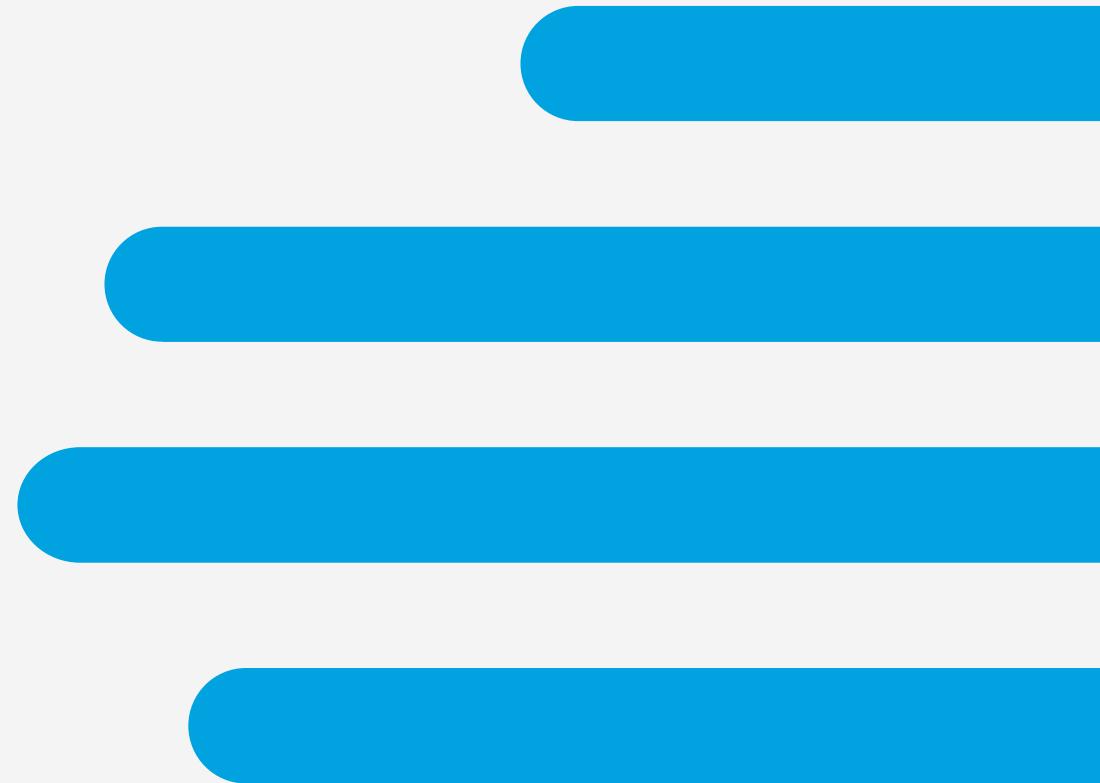
Pharma companies will get subsidies to develop analogue drugs – PM

The federal government will **subsidize pharmaceutical companies' projects to develop analogues of foreign drugs**. “The government will offer additional assistance to pharmaceutical companies, subsidizing projects to develop and register domestic analogues of drugs currently under foreign patent protection,” Prime Minister Mikhail Mishustin told his deputies.

“The program covers the most commonly used drugs of strategic importance,” Mishustin said. “The plan aims to start domestic production after the expiry of foreign patents. This is of special significance, given strong external pressure,” the prime minister said.

02

Total pharma market

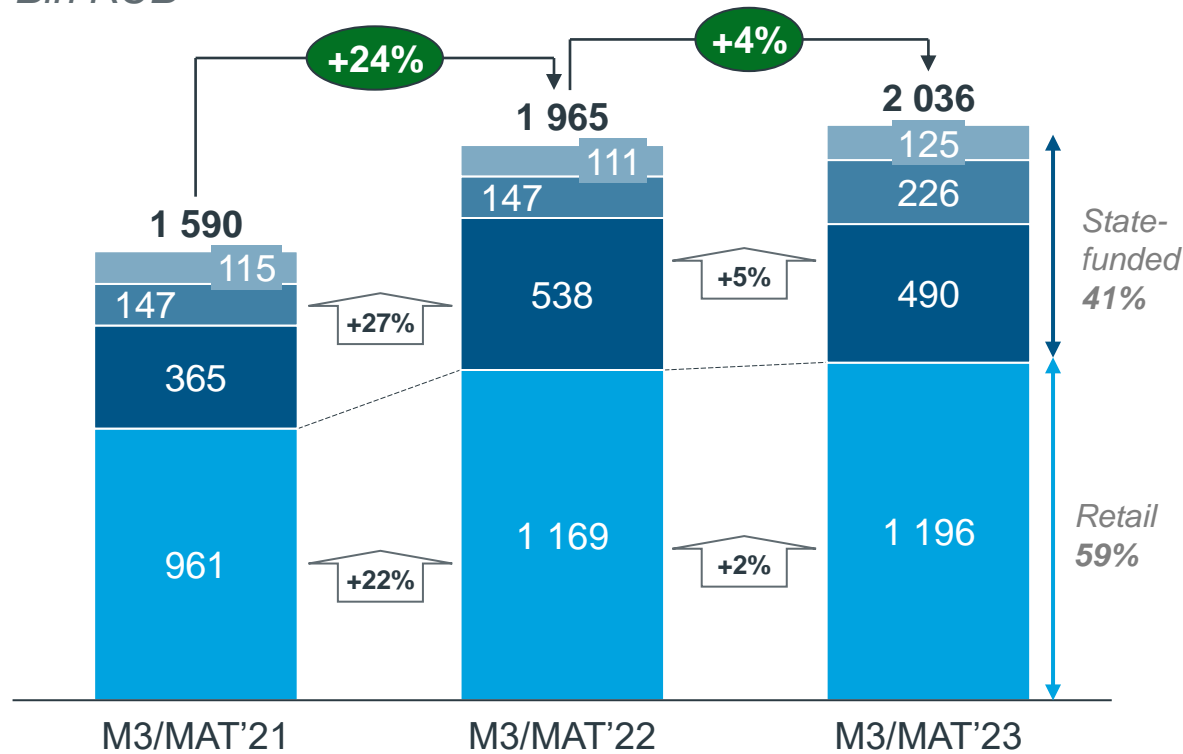


Value growth of the Russian pharma market is subsiding both in state and retail segments due to lack of significant growth drivers

Total pharma market by channels

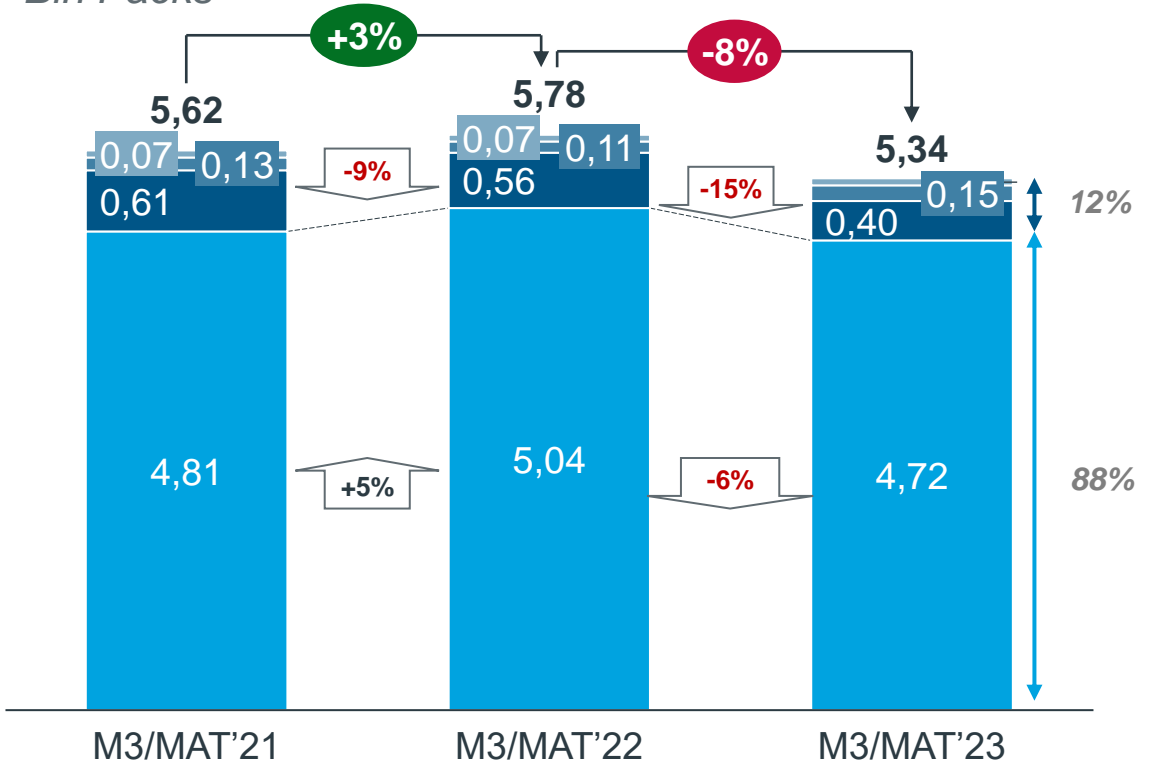
Total Sales by Value

Bln RUB



Total Sales by Volume

Bln Packs



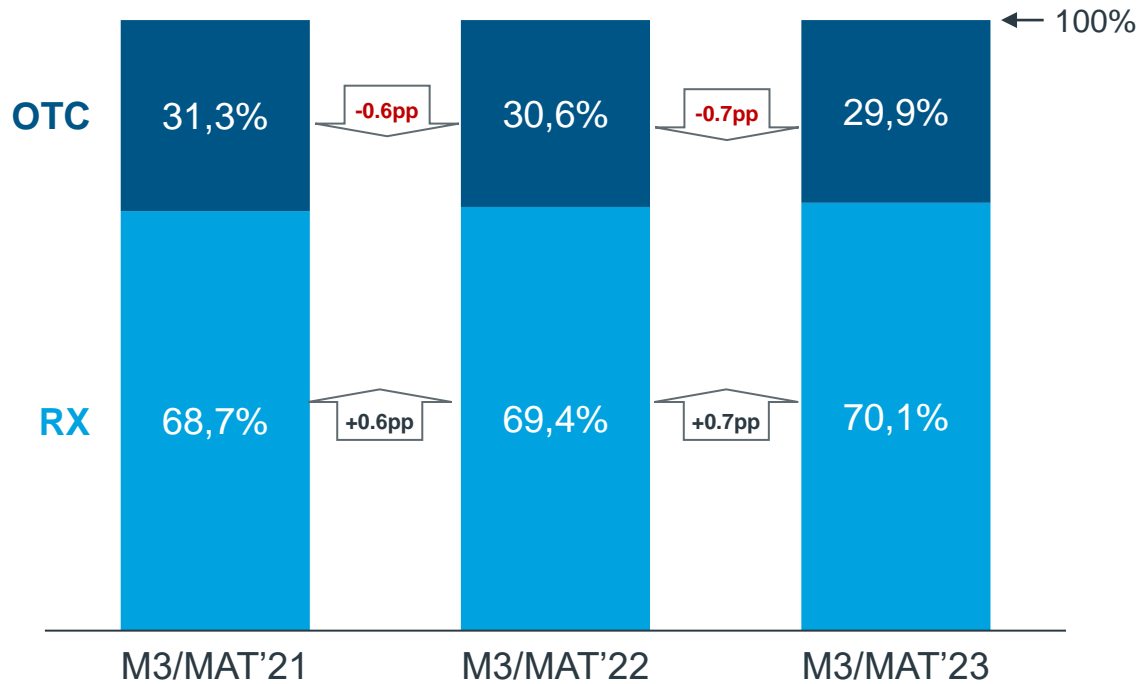
■ Retail
 ■ Public
 ■ Federal Reimbursement
 ■ Regional Reimbursement

| Indicator | RUB | USD | EURO | Packs | SU |
|----------------------|---------|------|------|-------|-------|
| Value MAT'03'23, Bln | 2 036,1 | 31,4 | 30,3 | 5,3 | 217,2 |
| Growth 23/22, % | 4% | 22% | 37% | -8% | -3,7% |

The market is dominated by Rx medicines; share of non-generic drugs is the highest as those products are usually high price

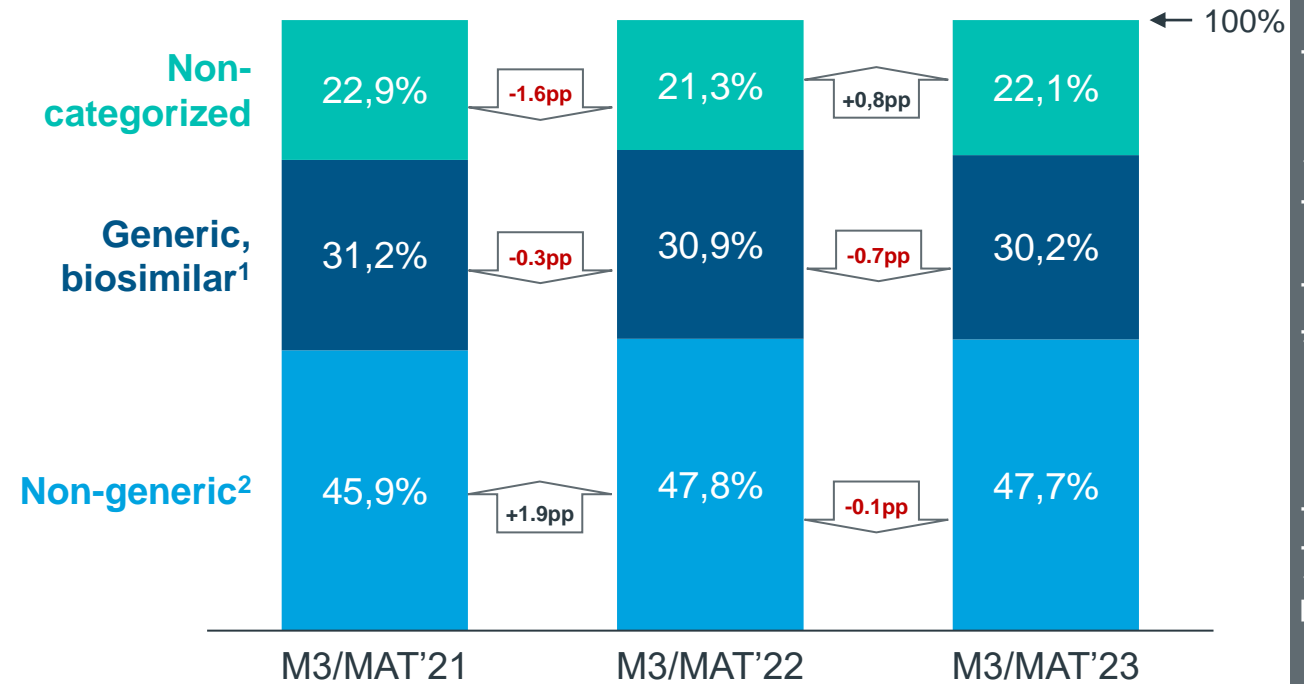
Total pharma market by structure

Prescription status
RUB



| | Rx / OTC, % | | |
|--------|-------------|---------|---------|
| Retail | 49 / 51 | 50 / 50 | 50 / 50 |
| State | 98 / 2 | 98 / 2 | 99 / 1 |

Non-generic vs generic biosimilar drugs
RUB

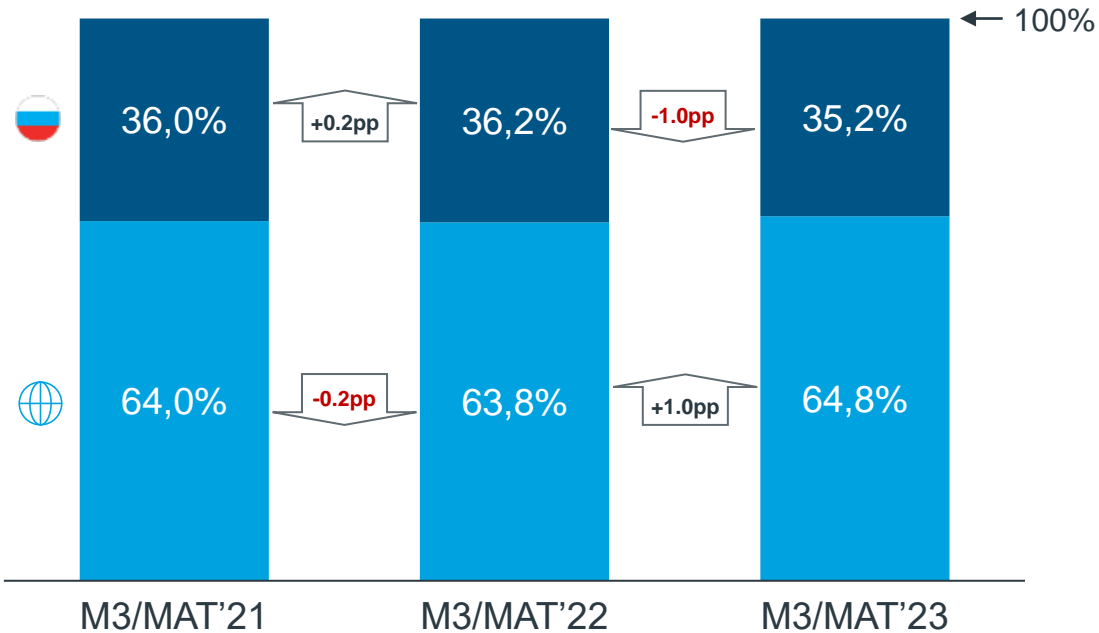


| | Non-generic ² / Generic, biosimilar ¹ / Non-categorized ¹ , % | | |
|--------|--|--------------|--------------|
| Retail | 34 / 38 / 28 | 35 / 37 / 28 | 32 / 39 / 29 |
| State | 64 / 21 / 15 | 68 / 21 / 11 | 71 / 17 / 12 |

Local companies have 35% of market share in value and 62% in volume terms which is still far behind Pharma 2030 objectives

Total pharma market by corporation nationality

Total Sales value
RUB

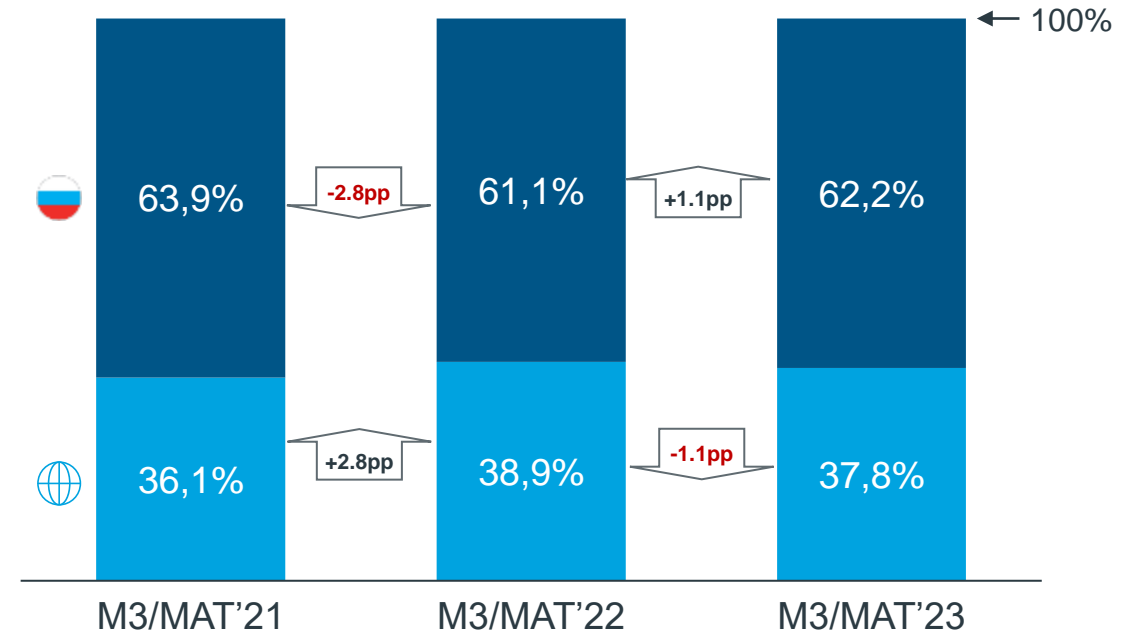


Local Multinational

Multinational / Local, %

| | | | |
|--------|---------|---------|---------|
| Retail | 63 / 37 | 64 / 36 | 61 / 39 |
| State | 65 / 35 | 64 / 36 | 70 / 30 |

Total Sales volume
Packs



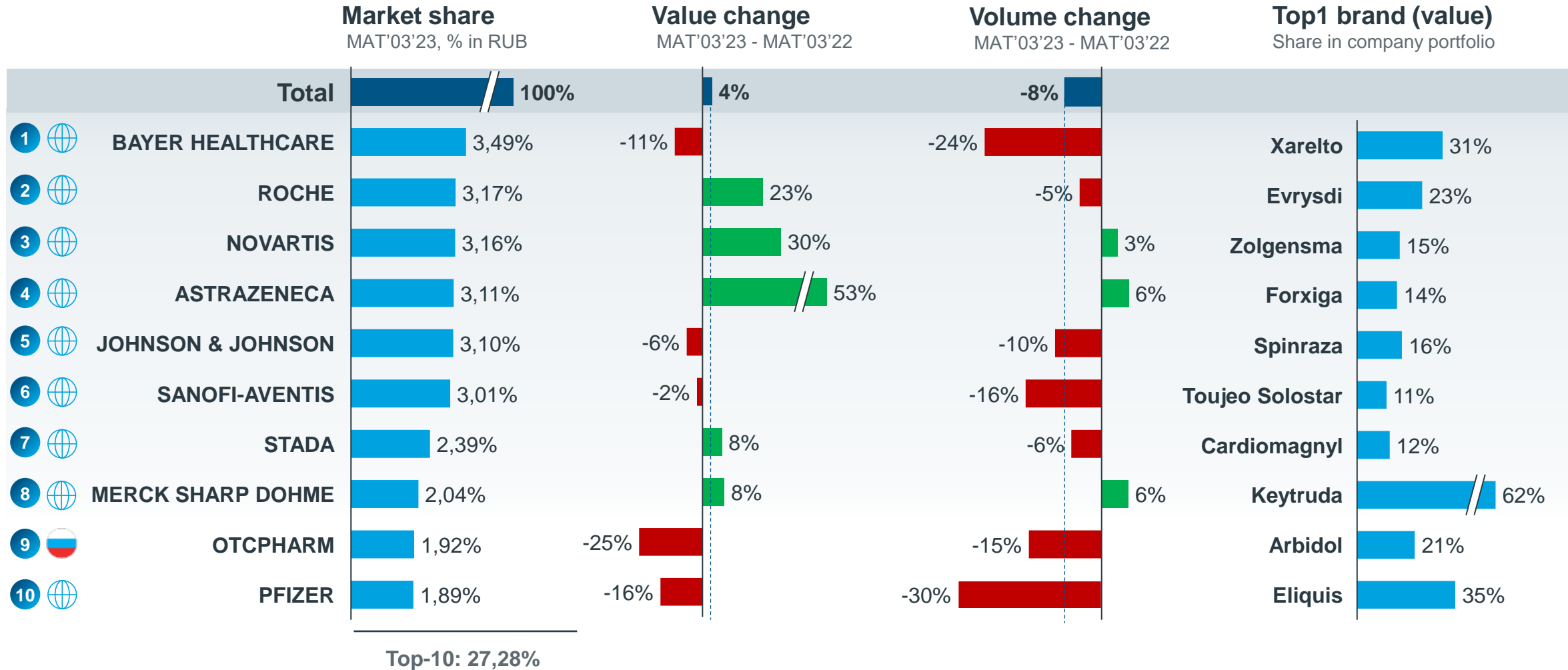
Local Multinational

Multinational / Local, %

| | | | |
|--------|---------|---------|---------|
| Retail | 39 / 61 | 42 / 58 | 40 / 60 |
| State | 21 / 79 | 20 / 80 | 21 / 79 |

Top-10 companies show a versatile trend where very few demonstrate a significant growth (AZ, Novartis) and others decline

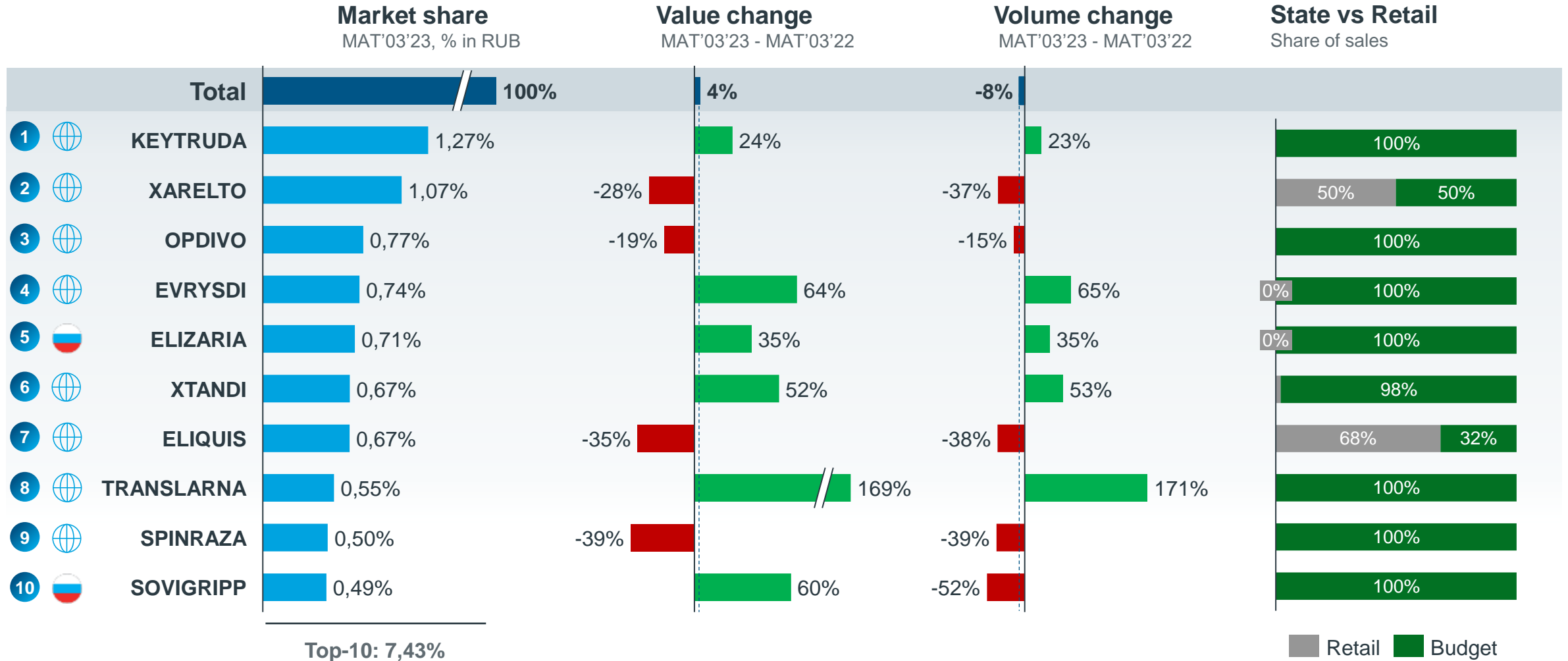
Top-10 overall ranking of companies by sales



Total pharmaceutical market overview

Most Top-10 brands generate their sales in the state-funded segment; there are only two local brand among Top-10

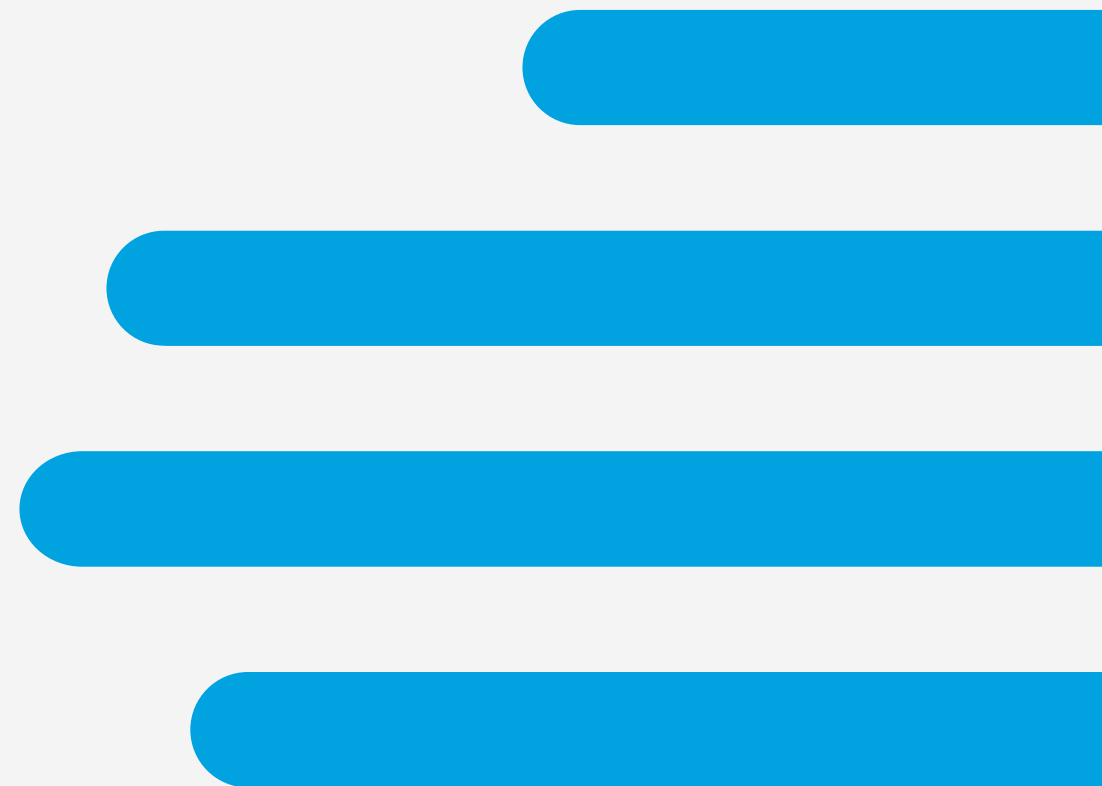
Top-10 overall ranking of brands by sales



Total pharmaceutical market overview

03

Retail segment

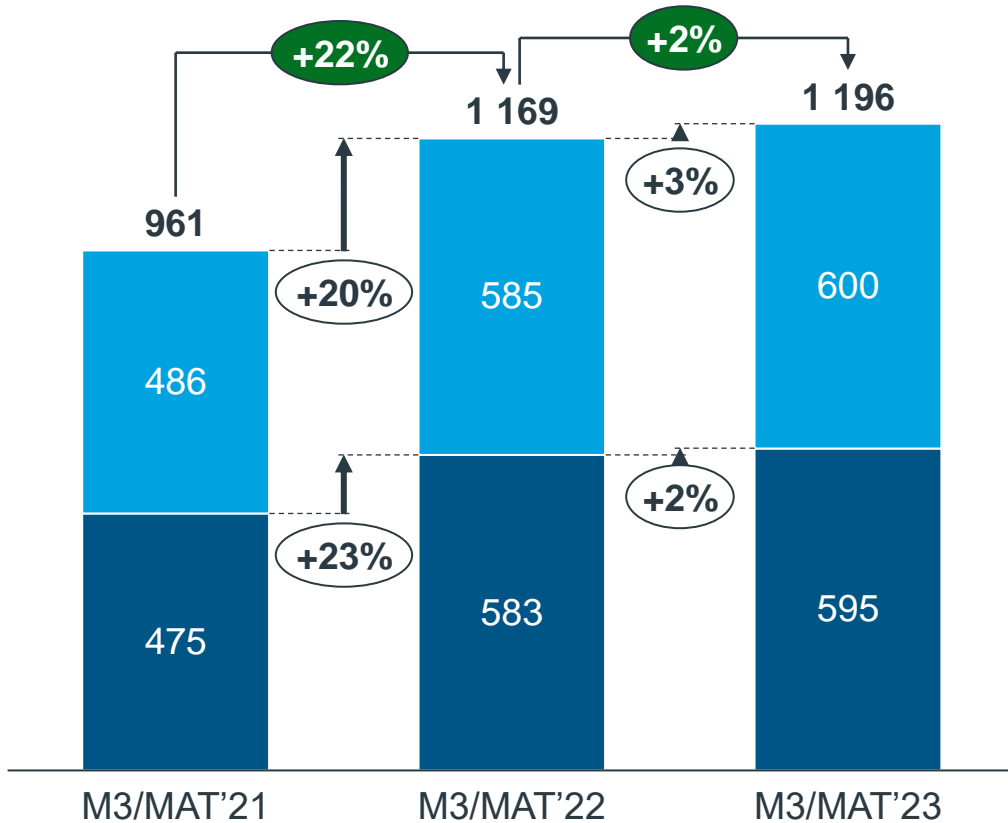


RX and OTC products have equal market share in value terms and OTC products dominate in volume in retail segment

Total Retail segment dynamics by OTC/Rx

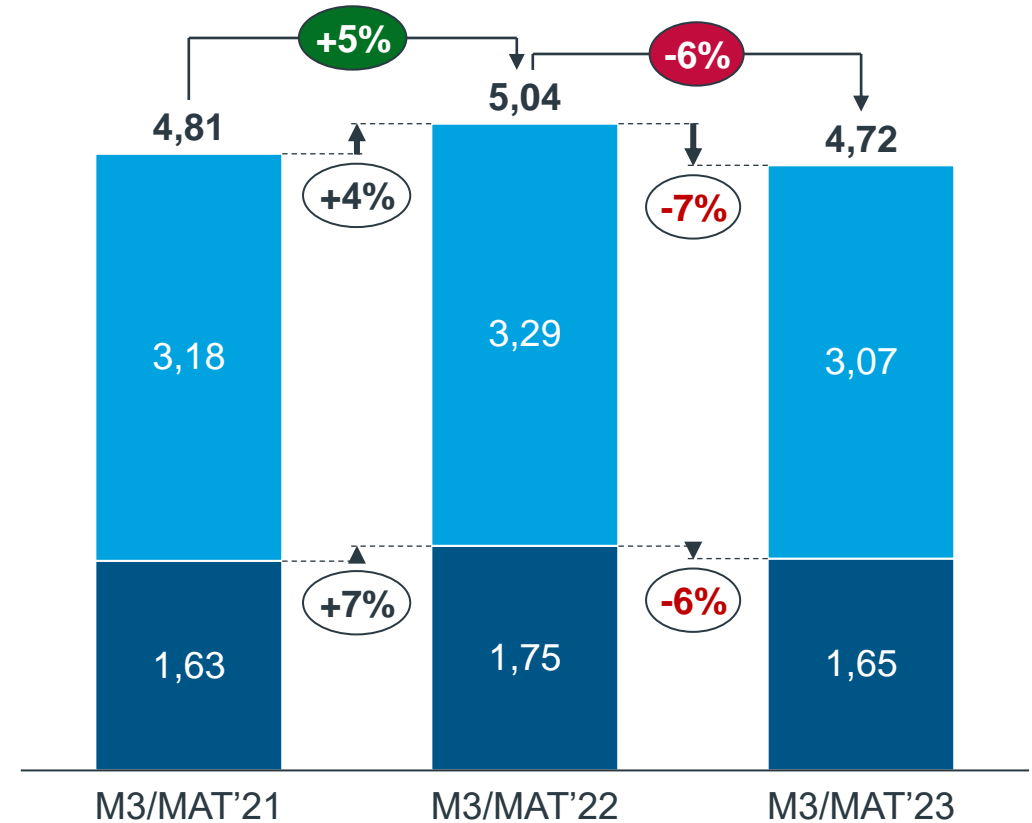
Total Retail Sales by Value

Bln RUB



Total Retail Sales by Volume

Bln Packs



■ OTC
■ RX

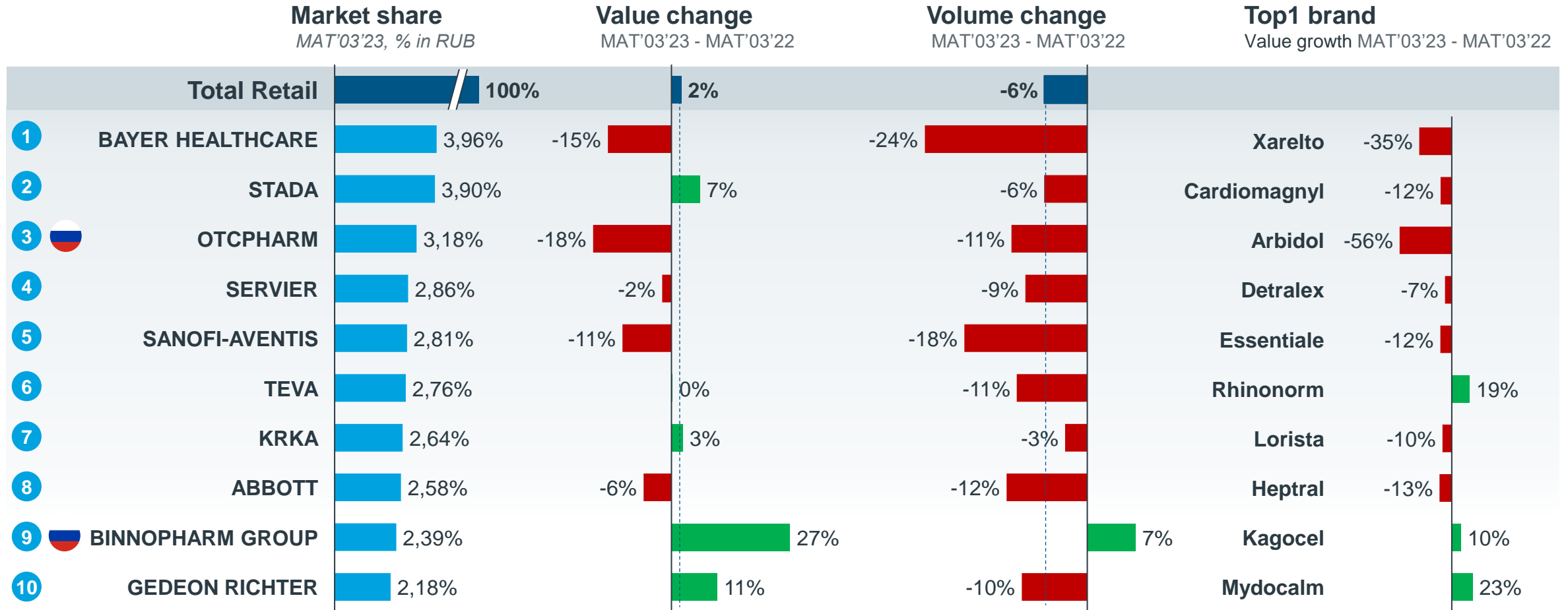
Only one category B01 (Antithrombotic) shows a negative YoY trend; others shape a positive sales dynamic in value terms

Retail segment EphMRA2 top-10 performance

| EphMRA2 | Market Share MAT'03'23 Bln RUB, % | CAGR, MAT'03'23 - MAT'03'21 % | YoY, MAT'03'23 - MAT'03'22 % | Top-1 Brand | | |
|--------------|--|-------------------------------------|------------------------------------|-----------------------------|-----------|-----|
| | | | | MS% within relative EphMRA2 | | |
| 1 | Z98 - Sotc Product | 77 (6%) | 14% | 10% | Bac-Set | 3% |
| 2 | C09 - Agents Acting On The Renin-Angiotensin System | 56 (5%) | 7% | -2% | Edarbi | 9% |
| 3 | R05 - Cough And Cold Preparations | 54 (4%) | 20% | 6% | Theraflu | 13% |
| 4 | R01 - Nasal Preparations | 45 (4%) | 21% | 18% | Snup | 8% |
| 5 | G03 - Sex Hormones And Products With Similar Desired Effects, Systemic Action Only | 41 (3%) | 16% | 6% | Femoston | 12% |
| 6 | B01 - Antithrombotic Agents | 39 (3%) | -1% | -28% | Xarelto | 28% |
| 7 | G04 - Urologicals | 37 (3%) | 10% | 1% | Canephron | 13% |
| 8 | N02 - Analgesics | 35 (3%) | 16% | 10% | Nurofen | 21% |
| 9 | M01 - Anti-Inflammatory And Anti-Rheumatic Products | 35 (3%) | 17% | 14% | Nimesil | 15% |
| 10 | R02 - Throat Preparations | 33 (3%) | 33% | 19% | Grammidin | 17% |
| Total Top-10 | | 450 (38%) | 14% | 4% | | |

Almost all Top-10 companies except for Binnopharm are in red zone in terms of volume MAT'03'2023 sales

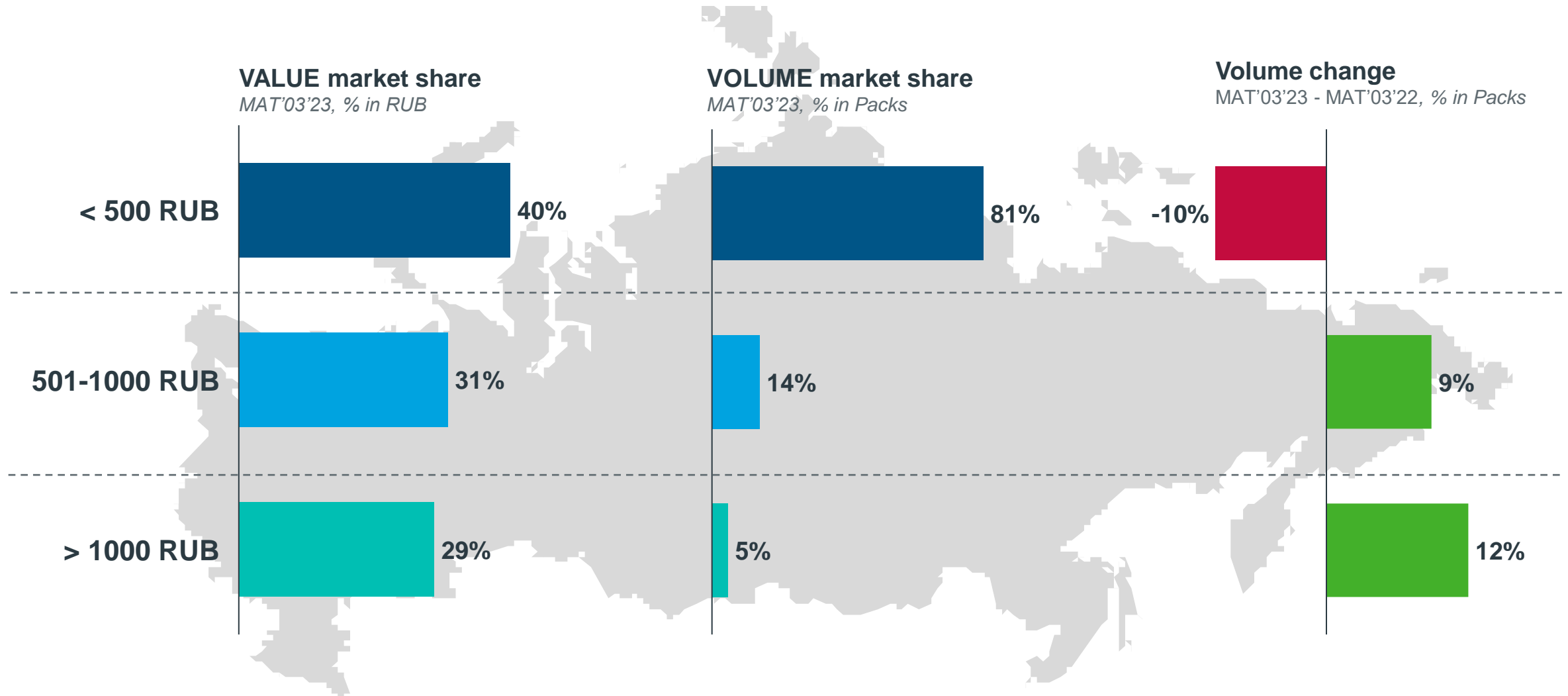
Top-10 retail segment ranking of companies by sales



Retail segment

81% of volume sales in retail segment are still with medicines at price <500 Rubles per pack

Retail sales distribution across pack price ranges



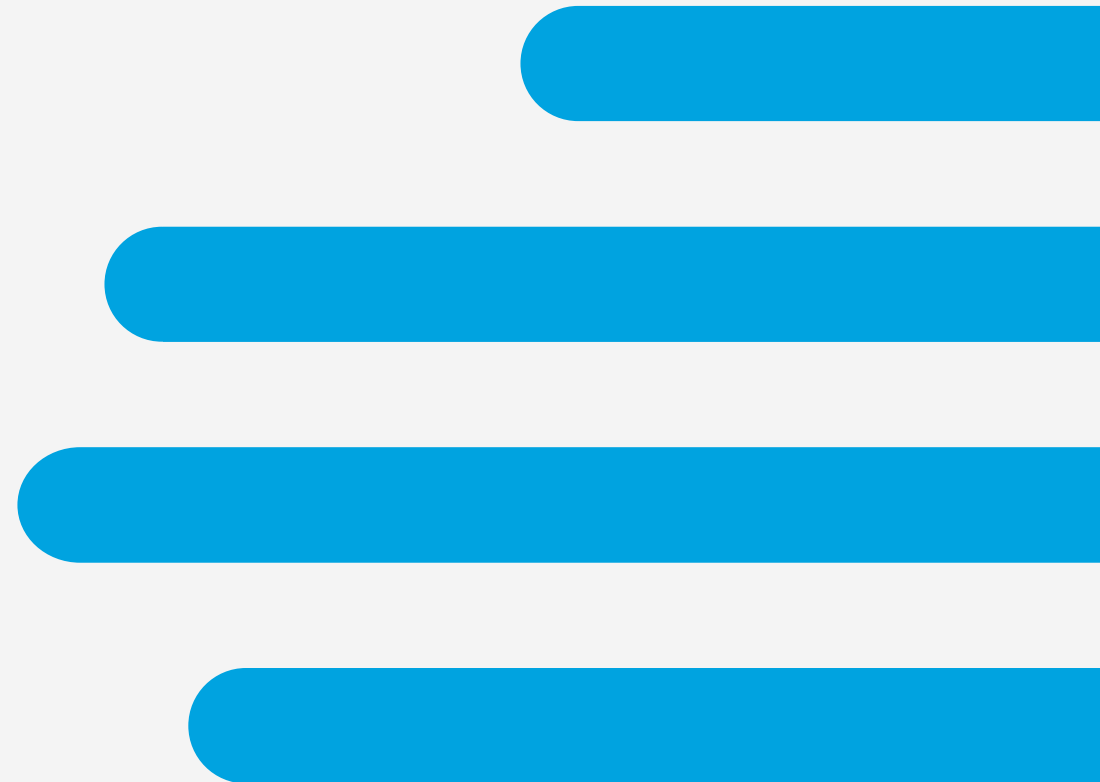
Lysobact, Ingavirin and Saxenda are products #1 in e-commerce sales in the relevant price pack range in MAT February 2023

Top5 SKUs by e-com sales in each price pack range

| E-commerce sales | Pack <500 RUB | Pack 501 – 1000 RUB | Pack >1001 RUB |
|------------------|--|--|---|
| # 1 | LYSOBACT T.SUCK.20MG 10MG 30 | INGAVIRIN CAPS 90MG 10 | SAXENDA CARTRID.+PEN 6MG 1ML 3 3ML |
| # 2 | CARDIOMAGNYL F.C.TAB 75MG 15.2MG 100 | CANEPHRON N C.TAB 60 | XARELTO FILM C.TABS 20MG 28 |
| # 3 | PENTALGIN FILM C.TABS 24 | MIRAMISTIN SOLUT. .01% 150ML | ELIQUIS FILM C.TABS 5MG 60 |
| # 4 | GRIPPFERON DROPS NASAL 10K 10ML | TAMIFLU CAPS 75MG 10 | ARMAVISCON FORTE SYRING I.A. 2.3% 3ML |
| # 5 | UTROGESTAN CAPS 200MG 14 | BAC-SET FORTE CAPS 20 210MG | DETRALEX F.C.TAB 900/ 100MG 60 |

04

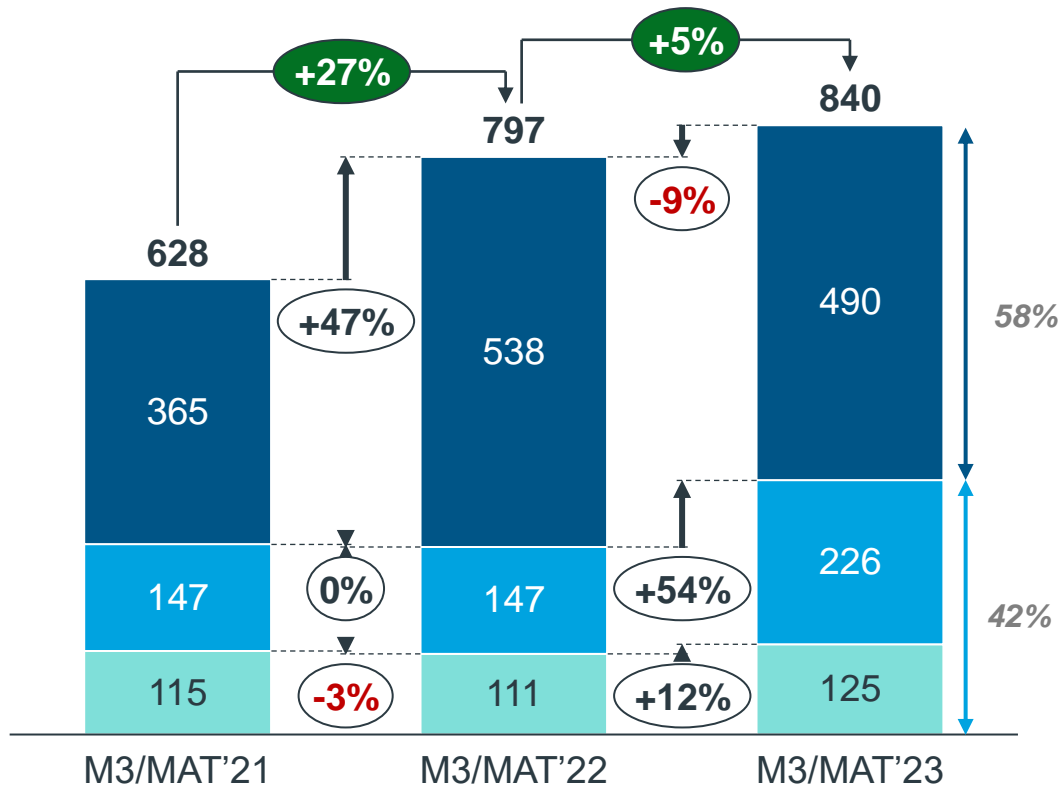
State-funded segment



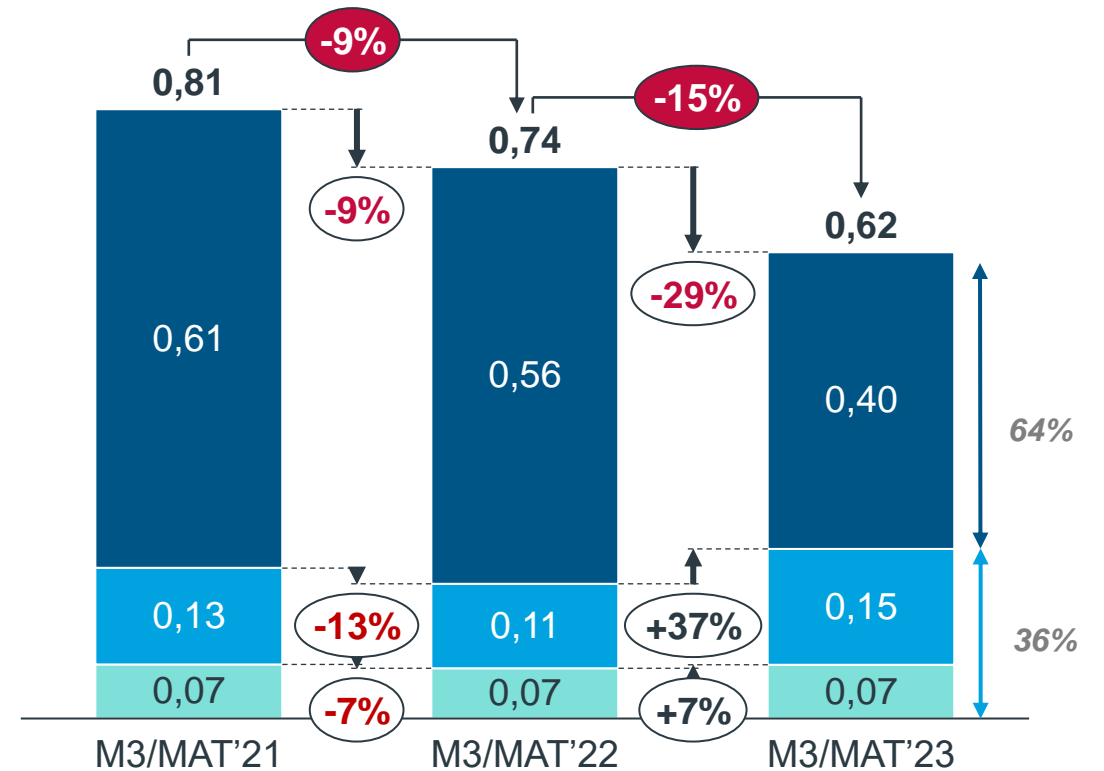
Hospital sales (public) occupy 58% of total reimbursement sales in Russia; the rest 42% (RLO & DLO) are realized in pharmacies

Total State funded segment

Total State funded Sales by Value
Bln RUB



Total State funded Sales by Volume
Bln Packs

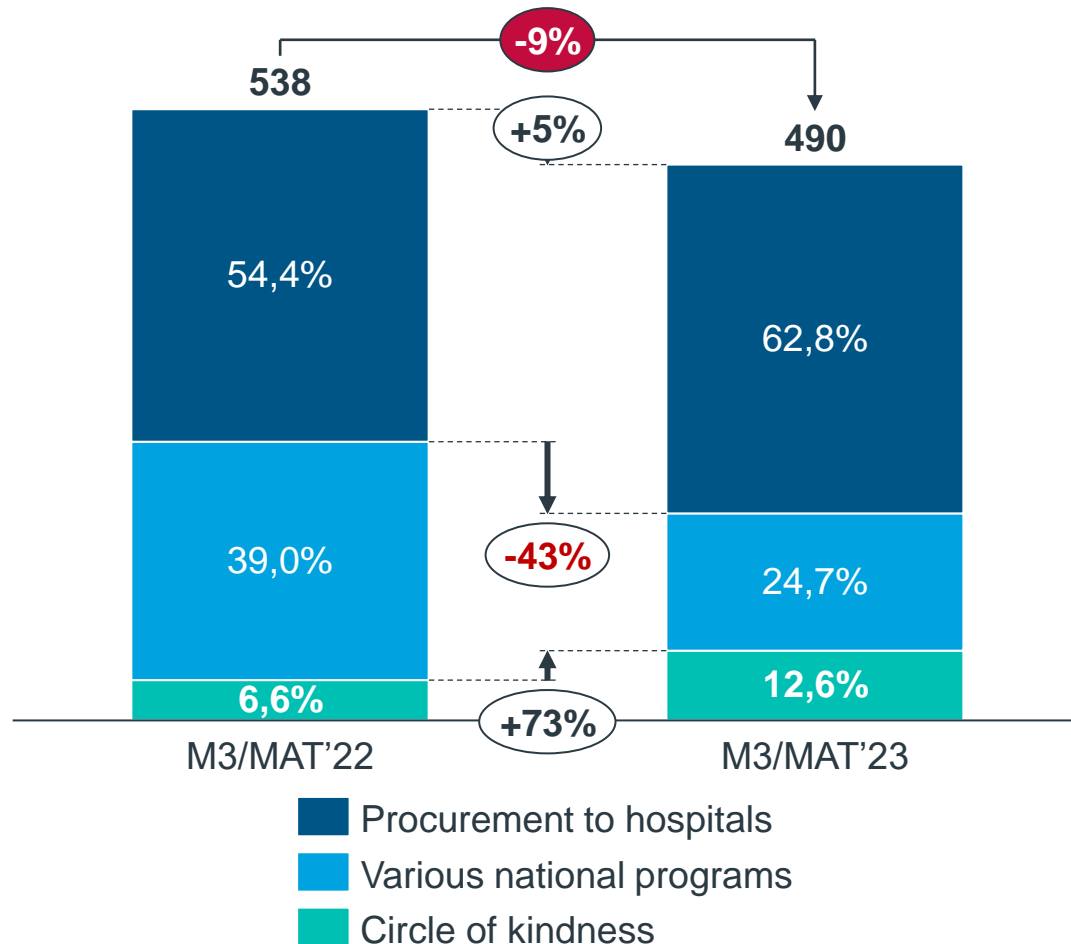


- Public
- Regional Reimbursement
- Federal Reimbursement

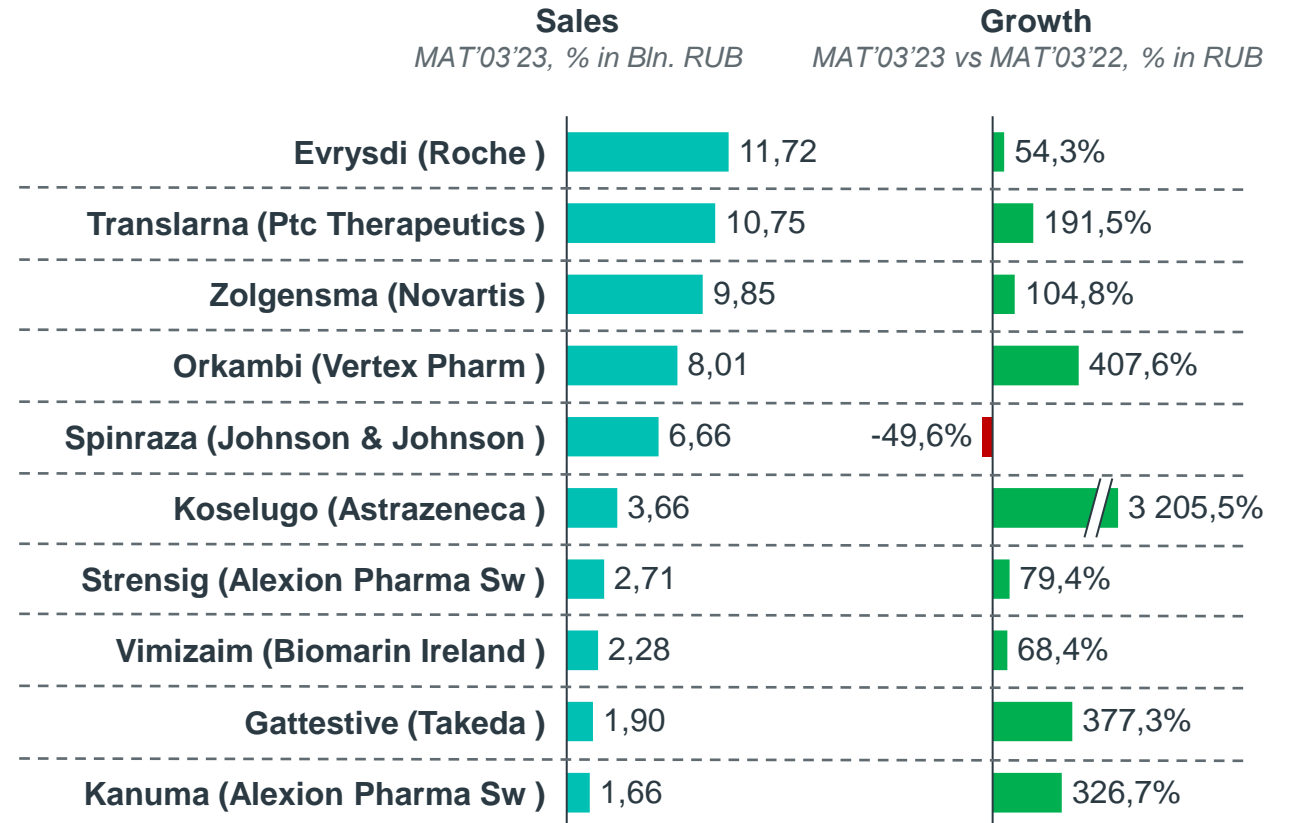
National state program “Circle of kindness” is the key contributor to the growth of public segment; Evrysdi is the largest product

Public (hospital) segment

Public Sales by Market Type
Bln RUB



Top-10 Brands in “Circle of kindness”



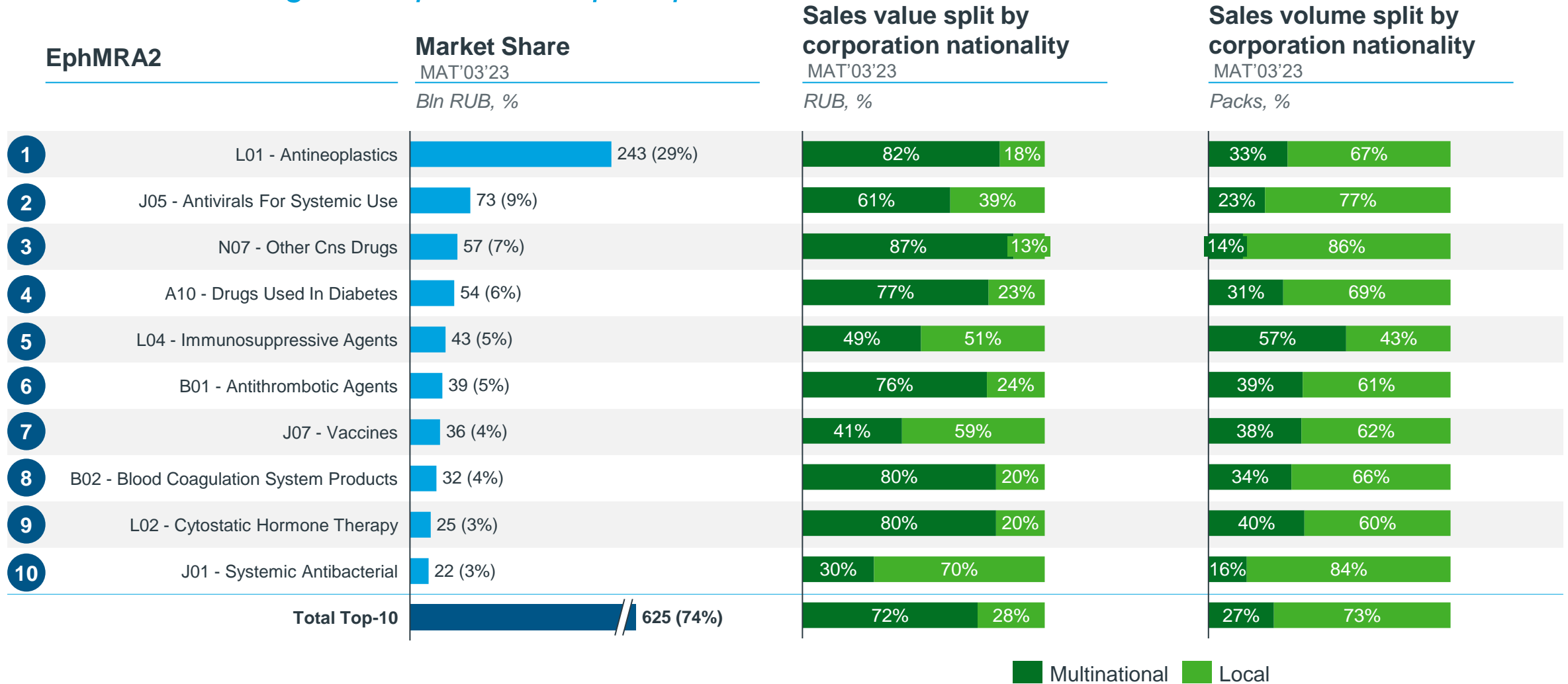
L01 is the largest category taking 29% of MS; J05, L04, B01, J01 are declining due to COVID irrelevance

State funded segment EphMRA2 top-10 performance

| EphMRA2 | Market Share | CAGR, | YoY, | Top-1 Brand | | |
|---------------------|---|--------------------------|----------------------------|-------------|-----------------|-----|
| | MAT'03'23 Bln RUB, % | MAT'03'23-MAT'03'21 % | MAT'03'23 - MAT'03'22 % | | | |
| 1 | L01 - Antineoplastics | 243 (29%) | 18% | 27% | Keytruda | 11% |
| 2 | J05 - Antivirals For Systemic Use | 73 (9%) | 25% | -32% | Tivicay | 13% |
| 3 | N07 - Other Cns Drugs | 57 (7%) | 42% | 4% | Evrysdi | 26% |
| 4 | A10 - Drugs Used In Diabetes | 54 (6%) | 18% | 32% | Toujeo Solostar | 12% |
| 5 | L04 - Immunosuppressive Agents | 43 (5%) | 15% | -27% | Elizaria | 34% |
| 6 | B01 - Antithrombotic Agents | 39 (5%) | 3% | -27% | Xarelto | 28% |
| 7 | J07 - Vaccines | 36 (4%) | 1% | 4% | Sovigripp | 27% |
| 8 | B02 - Blood Coagulation System Products | 32 (4%) | 6% | 29% | Hemlibra | 15% |
| 9 | L02 - Cytostatic Hormone Therapy | 25 (3%) | 26% | 50% | Xtandi | 53% |
| 10 | J01 - Systemic Antibacterial | 22 (3%) | -17% | -22% | Linezolid | 9% |
| Total Top-10 | | 625 (74%) | 15% | 2% | | |

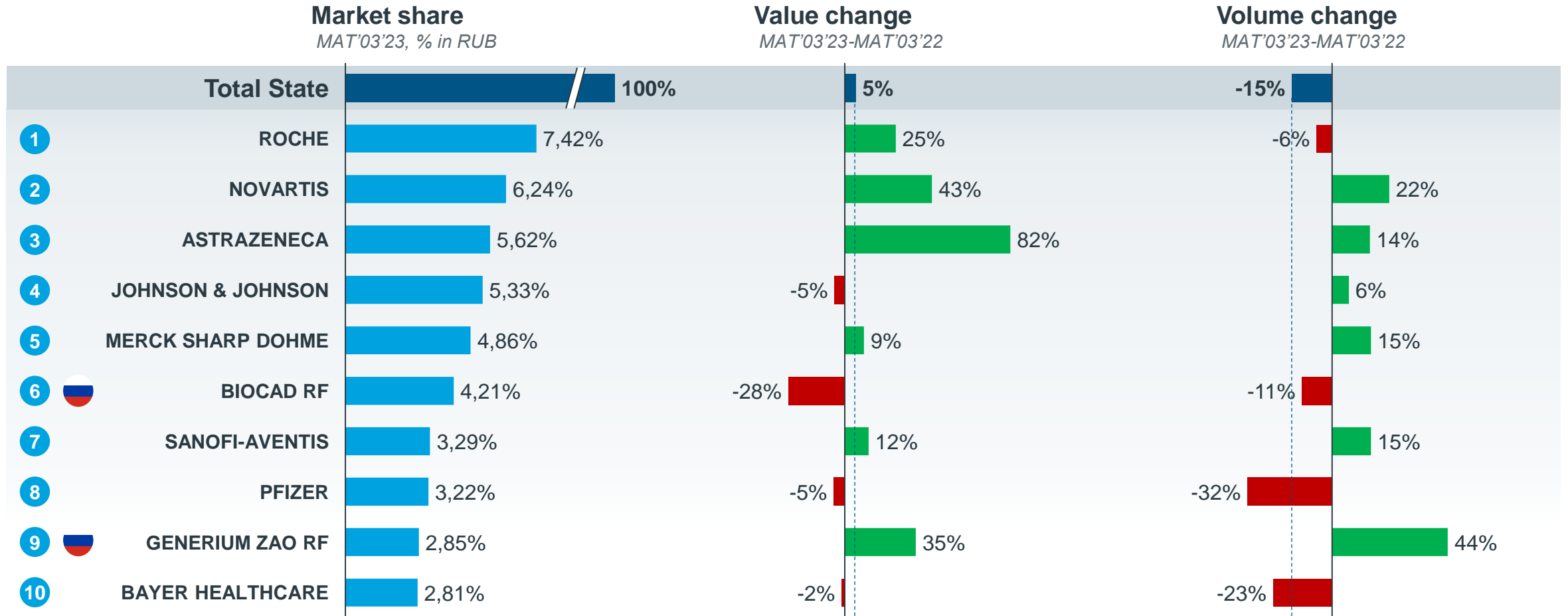
Multinational corporations' sales constitute around 72% of the market value and around 27% of the market volume

State funded segment EphMRA2 top-10 performance



AstraZeneca shows an outstanding value growth in MAT March 2023 leveraging all opportunities that market has provided

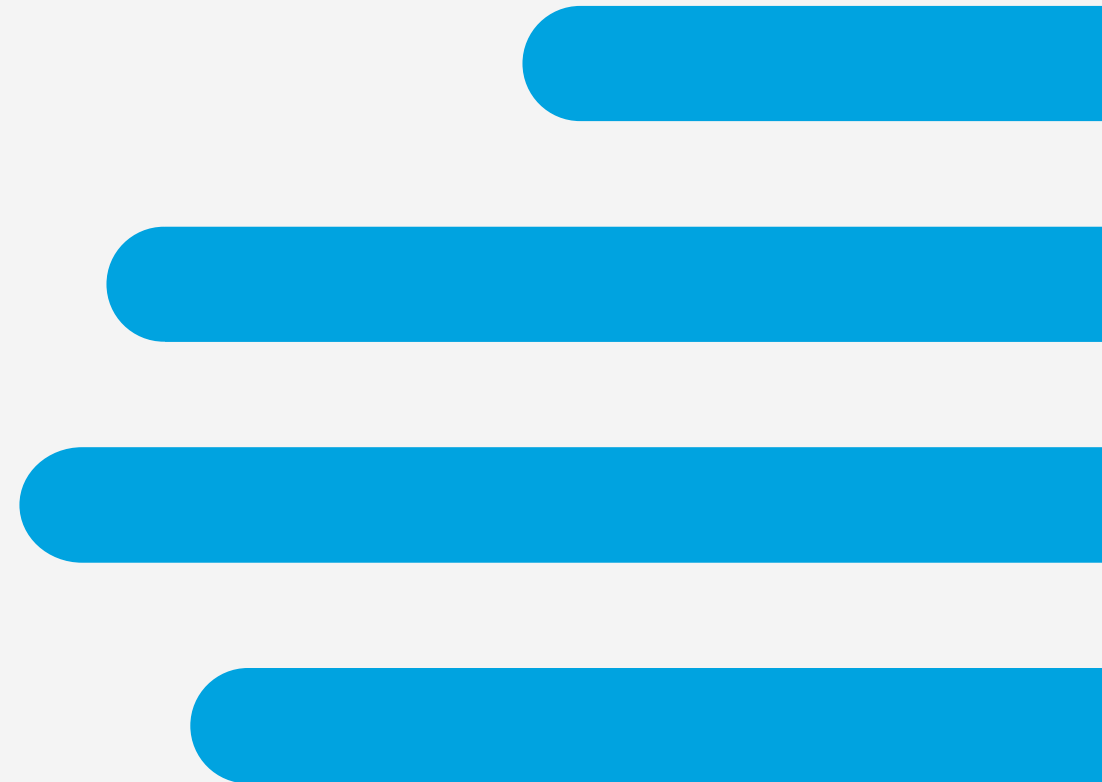
Top-10 state funded segment ranking of companies by sales



State funded segment

05

Pharma market forecast

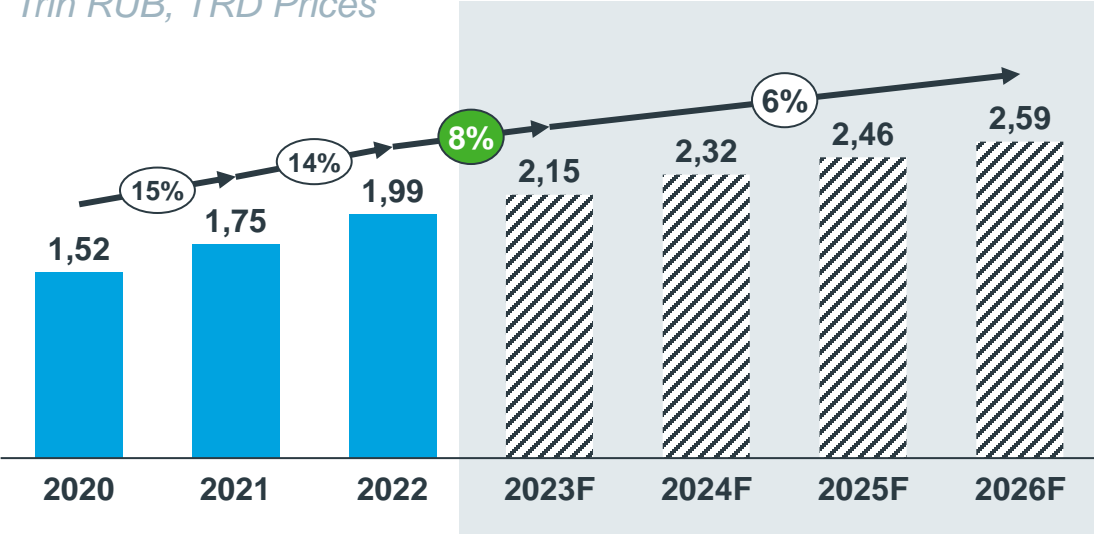


Pharma market is expected to slow down in 2023 and be in line or above the inflation rate that is predicted to be around 6%

Total market dynamics until 2026

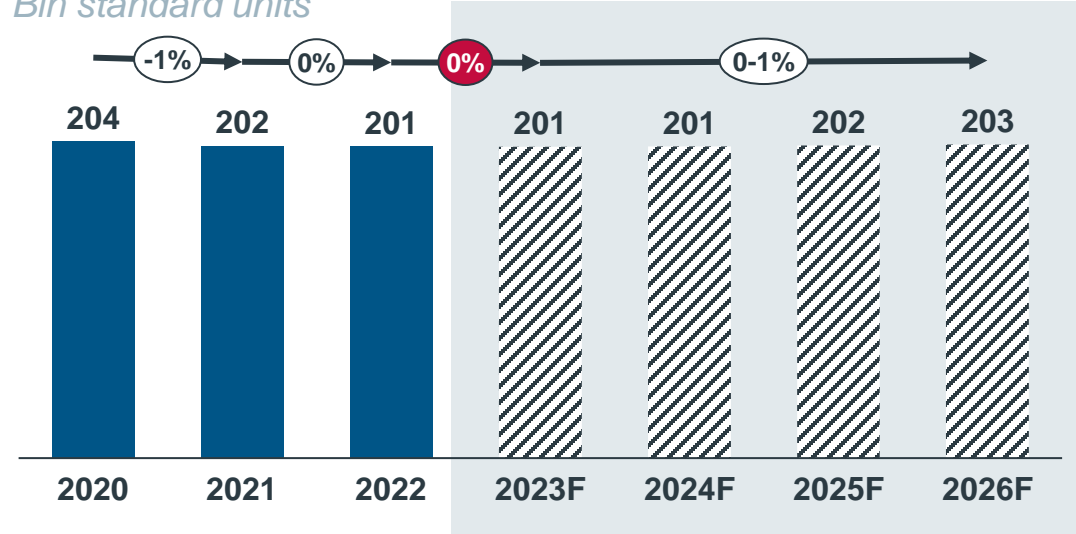
Market size in value terms

Trln RUB, TRD Prices



Market size in volume terms

Bln standard units








Comments:

- Covid and crisis (2020-2022):** Market boost due to overstocking behavior of consumers and surge in anti-viral and covid-related products. In addition, high inflation and significant price increase of non-EDL products resulted in 14-15% value market growth and shaped a very strong baseline. Volume is stagnating due to limited purchasing power of consumers.
- Recovery (2023-2026):** High growth in previous period will be offset by economic challenges and continues EU/US restrictions bringing the pharma market to 8% CAGR. In volume the pharma market is likely to be supported by new and on-going high-cost state programs (e.g. Diabetes, Orphan drugs, Oncology, Cardiology) to deliver 0-1% growth in the forecasted period.





There is a limited number of growth drivers that will support the Russian pharma market development so far

Key drivers for pharma market development

Retail

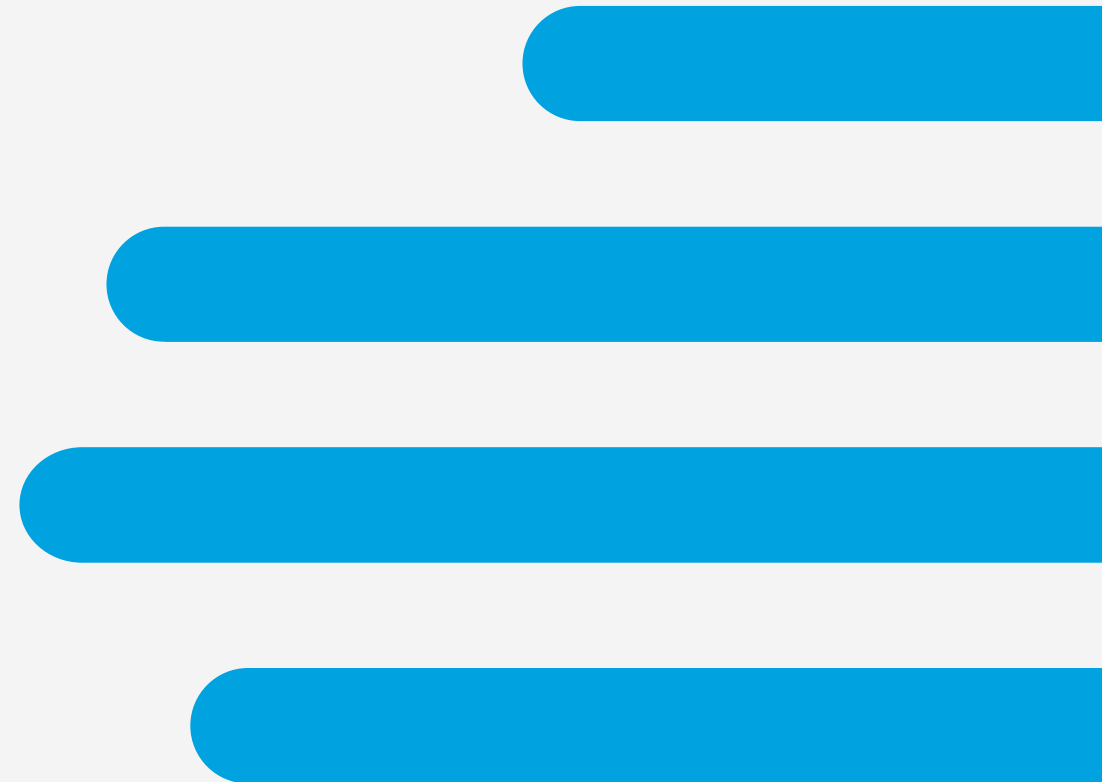
-  **Decreasing disposable income** of consumers due to the latest geo-political events
-  **Stop of overstocking behavior** of consumers (and quite strong baseline of 2022 year)
-  **Limited promotional activities** and product launches from MNCs
-  **Further e-com development** (search of the cheapest products)
-  **Price increase** (continued inflation)

State

-  **Limited funding in healthcare** and various federal & regional programs due to deficit of the Russian budget
-  **No further significant sales** increase of **COVID-related** medicines
-  Gradual **substitution of international medicines with local products** that are in many cases cheaper
-  **Extending of funding** of the most important national programs (e.g. «Circle of Kindness»)

06

Promo activities



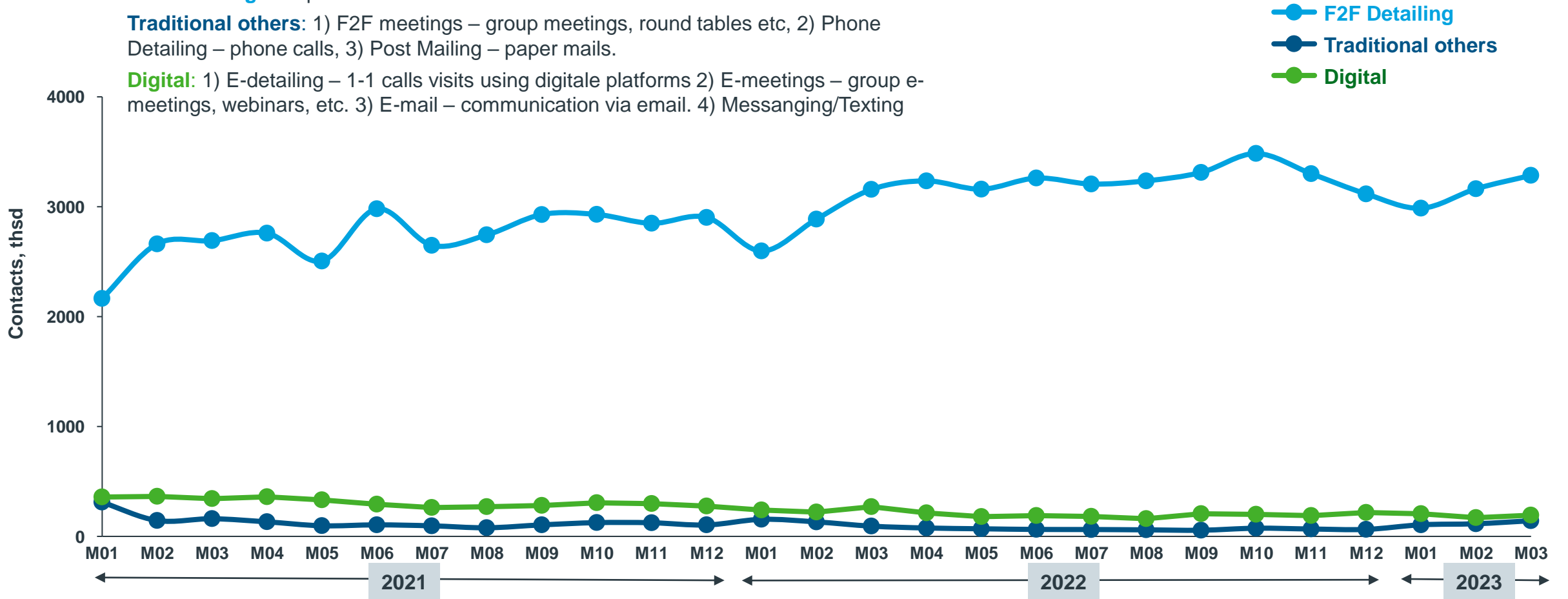
F2F detailing is gradually returning after Covid period and taking the leading position among all available promo channels

Promotional interactions by channel

F2F Detailing – Reps visits.

Traditional others: 1) F2F meetings – group meetings, round tables etc, 2) Phone Detailing – phone calls, 3) Post Mailing – paper mails.

Digital: 1) E-detailing – 1-1 calls visits using digitale platforms 2) E-meetings – group e-meetings, webinars, etc. 3) E-mail – communication via email. 4) Messanging/Texting

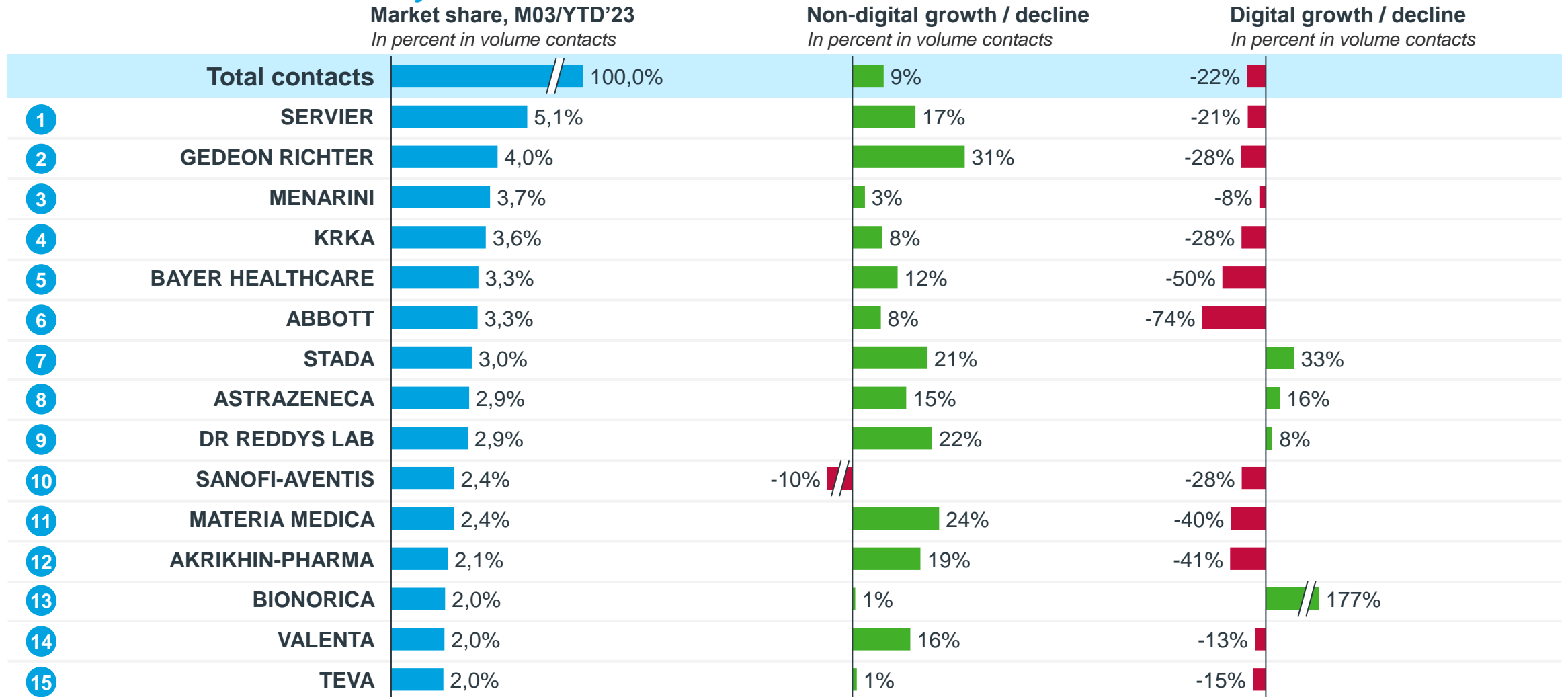


Promo activities

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. FACTS from IQVIA | Copyright © 2022 IQVIA. All rights reserved.

Most pharma companies reinvest into the traditional promotional activities and divest digital interactions

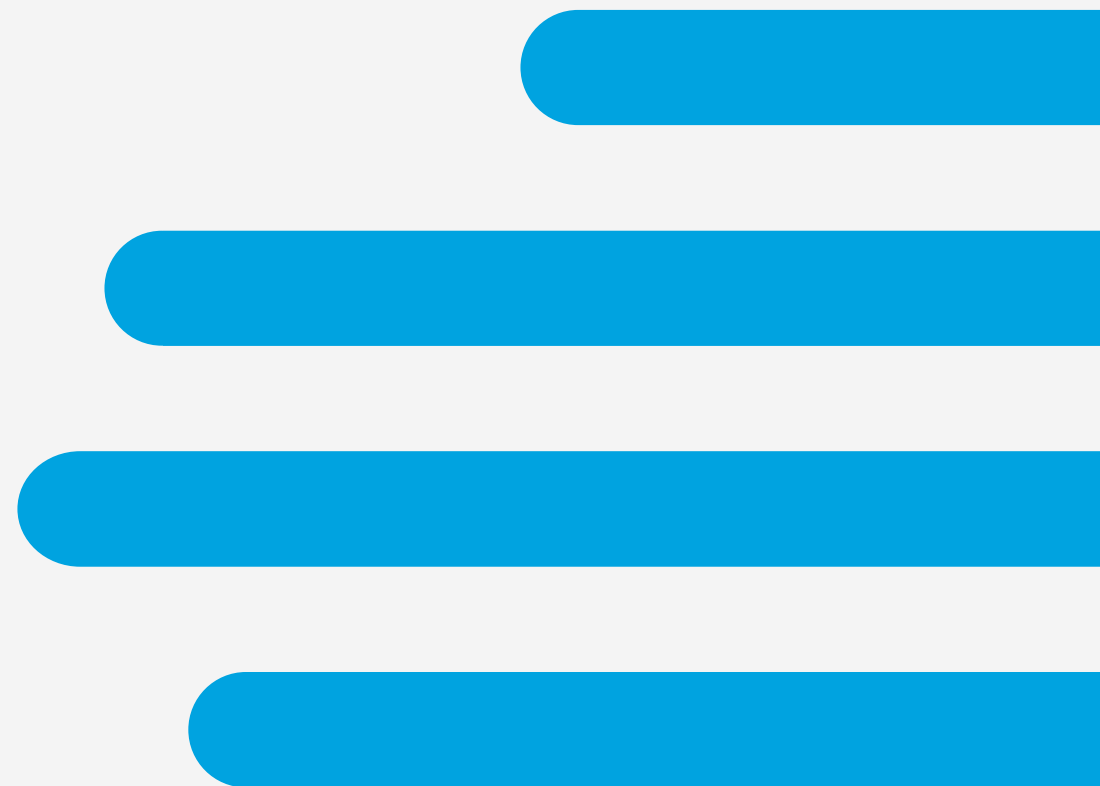
Promotional interactions by channel



Source: IQVIA Russia, Channel Dynamics promo évaluation; Specialities: Allergology/Pulmonology, Cardiology, Dermatology, Diabetes, E.N.T., Gastroenterology, GPs, Gynecology, Neurology, Oncology, Pediatric, Pharma, Psychotherapy, Urology.
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07

Value chain



Top-10 distributors own 69.3% of total gross sales in pharma market; Pulse is leader in Q1 2023

Total market top-10 distributors performance



| # | Distributor | Market share in gross sales*, % | | Change in gross sales Q1 2023 / Q1 2022, % |
|--------------|------------------|---------------------------------|--------------|--|
| | | Q1 2023 | Q1 2022 | |
| 1 | Pulse | 13,0% | 12,0% | -6,6% |
| 2 | Katren | 12,9% | 12,2% | -8,3% |
| 3 | Pulse | 12,1% | 13,2% | -20,3% |
| 4 | FK Grand Capital | 6,5% | 5,2% | 6,6% |
| 5 | R-Pharm | 5,8% | 9,0% | -43,7% |
| 6 | BSS | 4,6% | 5,2% | -23,1% |
| 7 | Pharmkomplekt | 4,2% | 3,7% | -1,1% |
| 8 | Pharmimeks | 4,0% | 2,4% | 40,3% |
| 9 | Irvin | 3,9% | 2,7% | 22,6% |
| 10 | Lancet | 2,4% | 2,0% | 6,0% |
| Total | | 69.3% | 67.6% | |

*Gross sales include Retail, State funded, Secondary and Non-target Sales

Top-10 pharmacy chains own 49.4% of total retail sales in pharma market; Asna is a pharmacy association that integrates 17 939 POS

Total market top-10 pharmacy chains

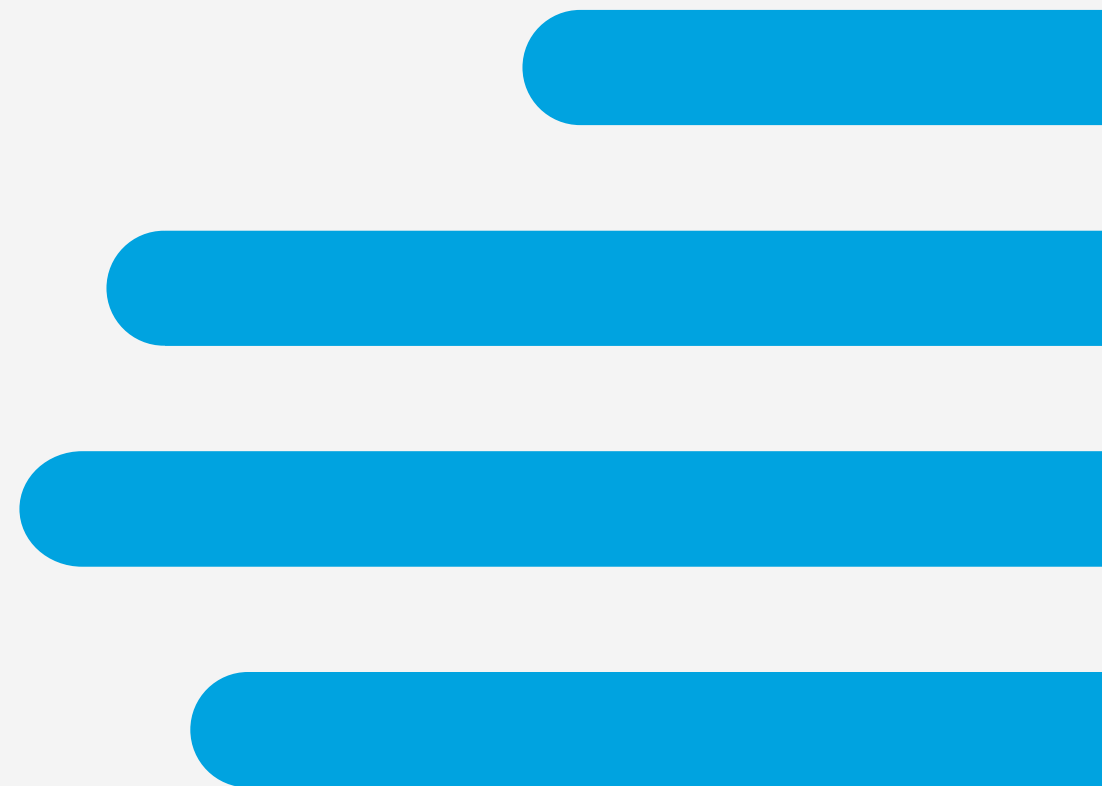


| # | Pharmacy chains | Market share in retail sales*, % | | Number of pharmacies (Point of Sales) Q1 2023 |
|--------------|--------------------------------|----------------------------------|--------------|---|
| | | Q1 2023 | Q1 2022 | |
| 1 | Asna** | 13,15% | 8,70% | 17 939 |
| 2 | Rigla | 7,41% | 6,86% | 3 752 |
| 3 | Aprēl | 5,32% | 5,32% | 5 821 |
| 4 | Erkhapharm & Melodiya Zdorovya | 4,97% | 4,84% | 2 091 |
| 5 | Iris | 3,84% | 5,14% | 2 725 |
| 6 | Neopharm | 3,38% | 3,27% | 1 112 |
| 7 | 36,6 | 3,38% | 3,55% | 1 846 |
| 8 | Vita (Samara) | 3,26% | 3,20% | 2 411 |
| 9 | Pharmland | 3,02% | 2,63% | 1 916 |
| 10 | Maksavit | 1,63% | 1,77% | 883 |
| Total | | 49.4% | 45.3% | |

*Drug sales in retail channel
 **ASNA – pharmacy association

08

CIS countries



CIS+ pharma markets demonstrate the domination of retail segment; Rx products are accounting for ~60-70% of sales

CIS+ countries pharmaceutical markets

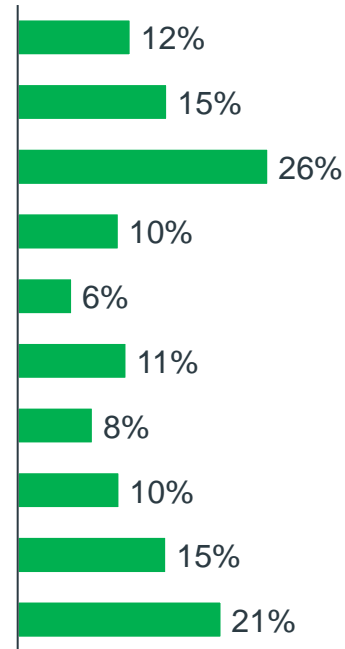
Pharma market sales

mln USD, MAT'03'23



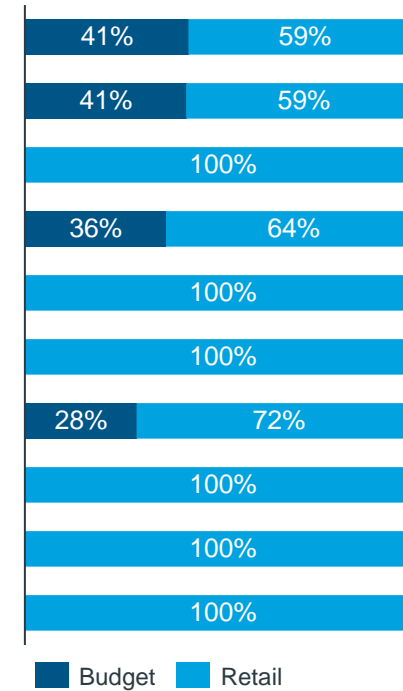
CAGR

LC, %, MAT'03'23 - MAT'03'20



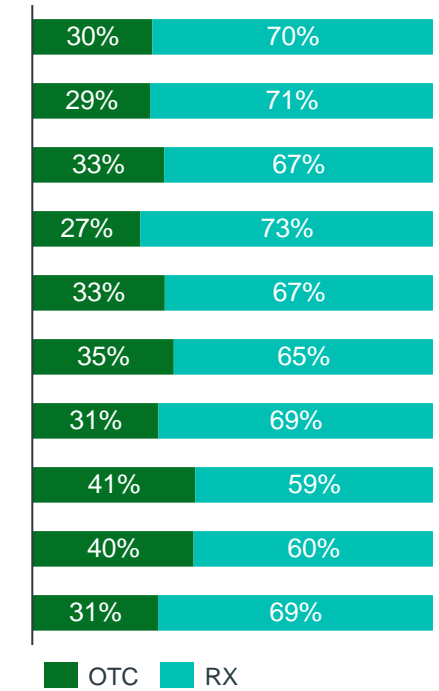
Market channel split

USD, MAT'03'23



Product type split

USD, MAT'03'23



Comments

- Kazakhstan and Uzbekistan are the largest markets where Uzbekistan shows the largest CAGR growth dynamic.
- Retail segment is prevailing for CIS+ markets with Kazakhstan, Belarus and Moldova showing the largest shares of budget channel.
- Prescribed products account for approximately 60-70% of 2022 sales in value in each of the CIS+ countries.

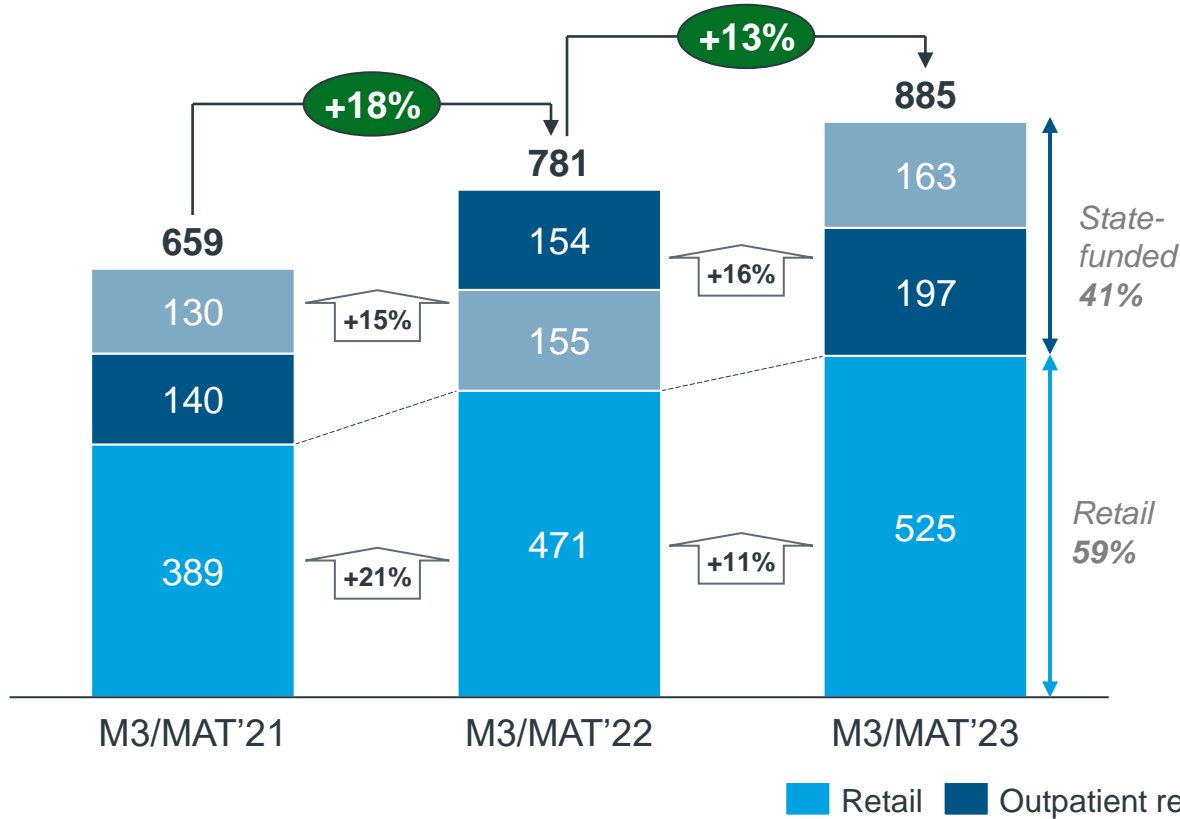
⁽¹⁾ For Uzbekistan, Azerbaijan, Georgia, Kyrgyzstan and Armenia budget channel is assessed based on the IQVIA team expertise; ⁽²⁾ For Mongolia data available only on import.



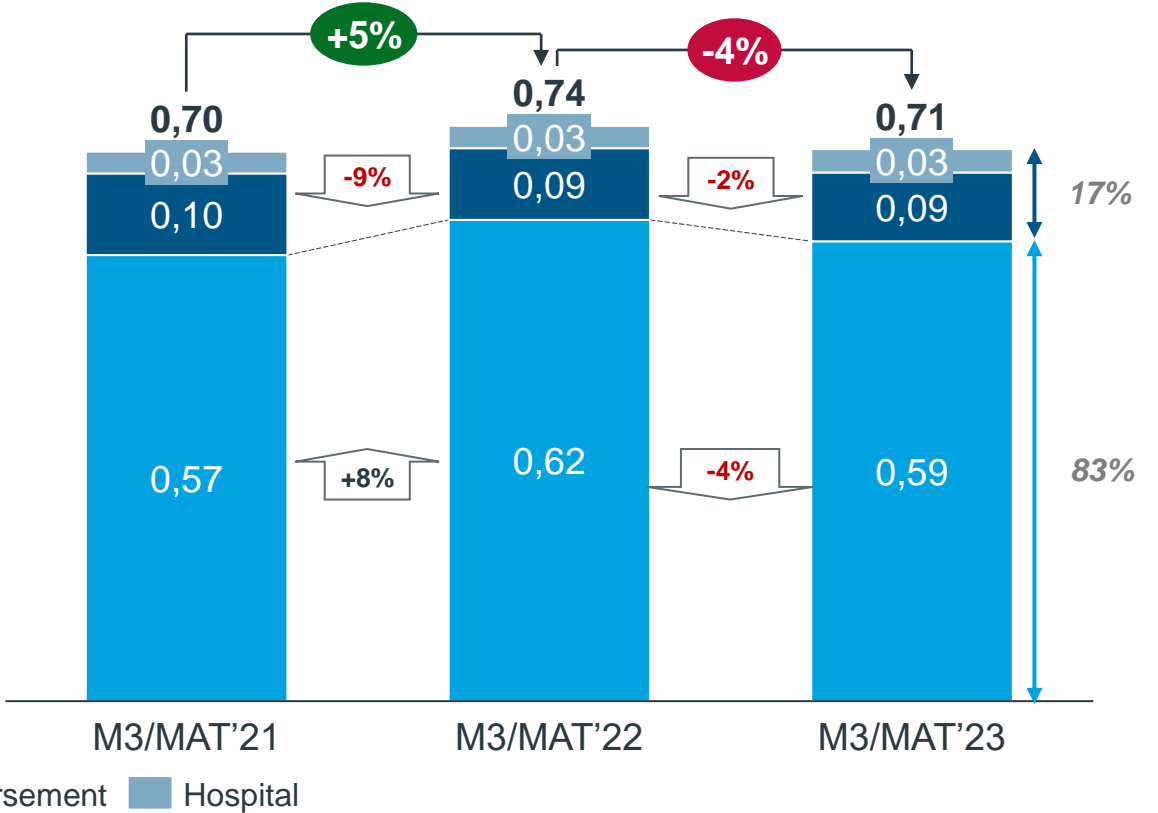
Kazakhstan pharma market continues to grow in value terms in MAT March 2023 both in retail and state-funded channels

Total pharma market by channels

Total Sales by Value
Bln KZT



Total Sales by Volume
Bln Packs

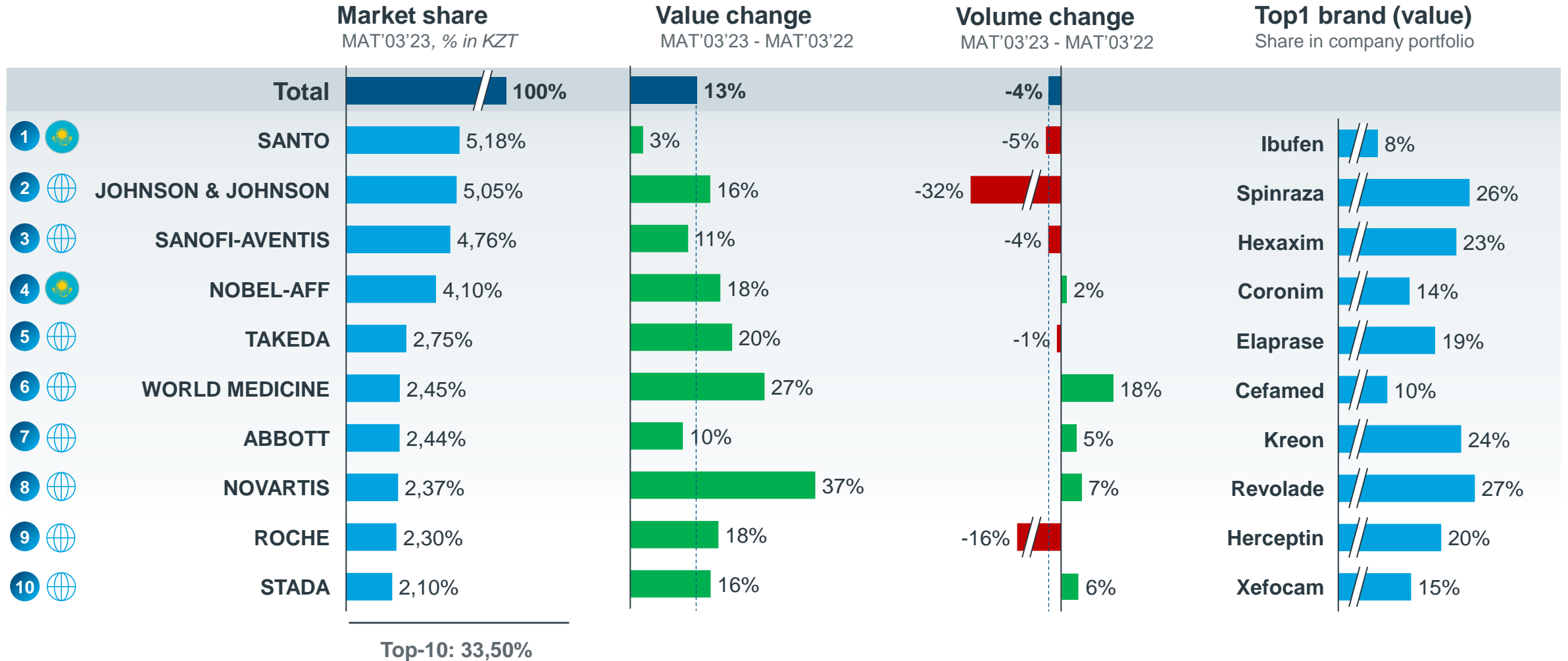


| Indicator | KZT | USD | EURO | Packs | SU |
|----------------------|-------|-----|------|-------|------|
| Value MAT'03'23, Bln | 884,8 | 1,9 | 1,8 | 0,7 | 20,8 |
| Growth 23/22, % | 13% | 7% | 19% | -4% | 0,0% |



J&J shows the strongest value growth while it is declining in volume; Spinraza is Top1 product in J&J portfolio

Top-10 overall ranking of companies by sales

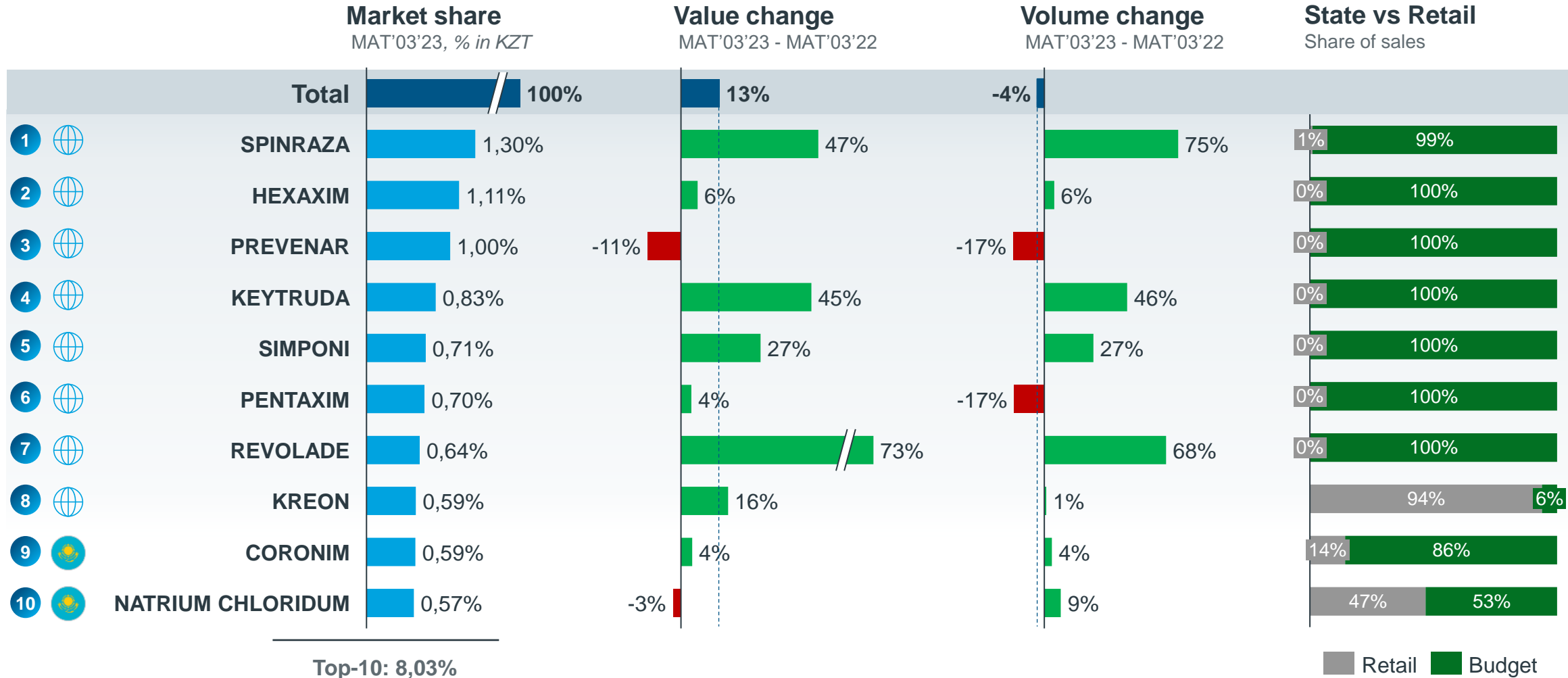


Total pharmaceutical market overview



Most Top-10 brands generate their sales in the state-funded segment; there are two local brands among Top-10

Top-10 overall ranking of brands by sales



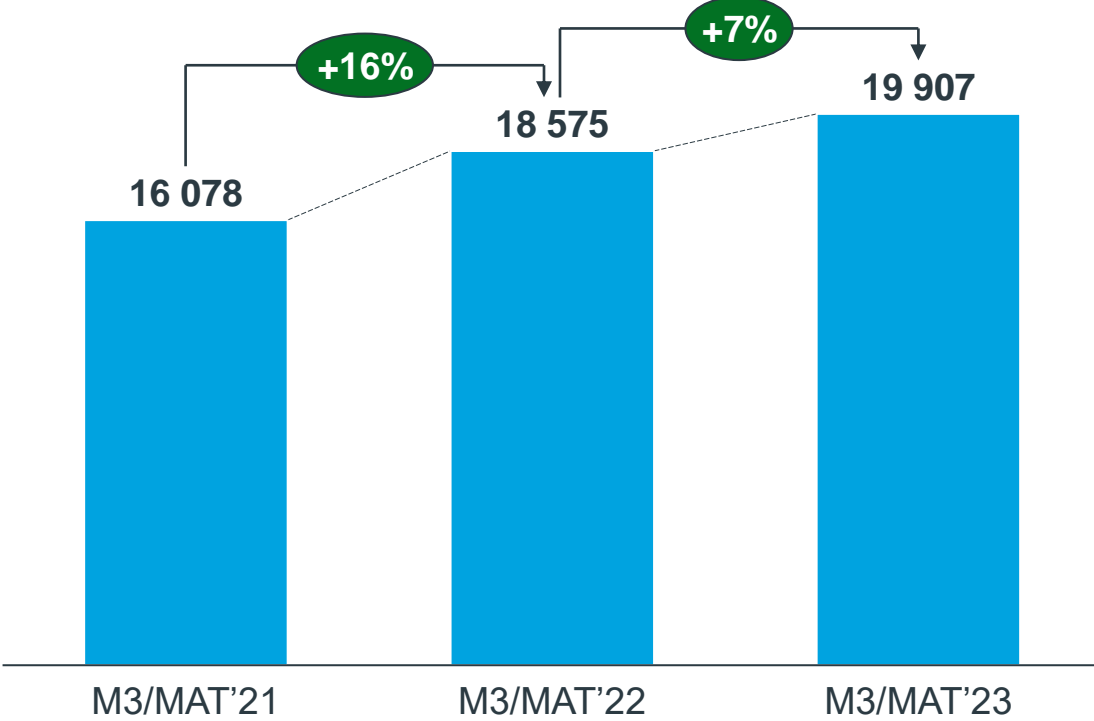
Total pharmaceutical market overview



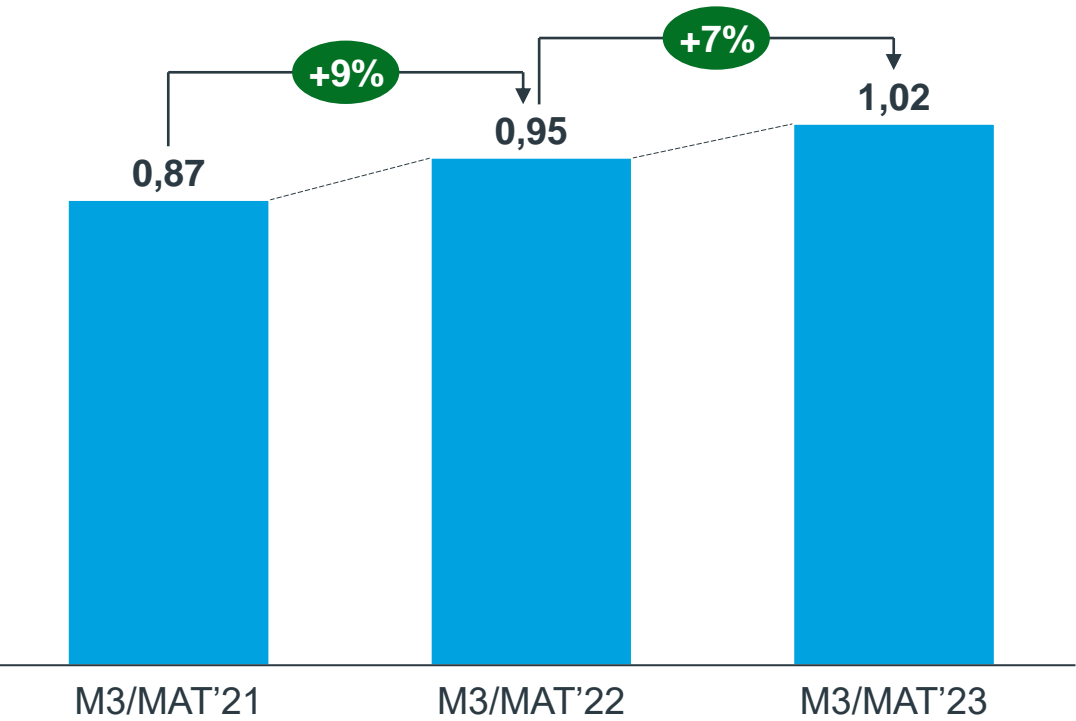
Uzbekistan pharma market continues to grow in value and volume terms in MAT March 2023

Total pharma market

Total Sales by Value
Bln UZS



Total Sales by Volume
Bln Packs



■ Retail

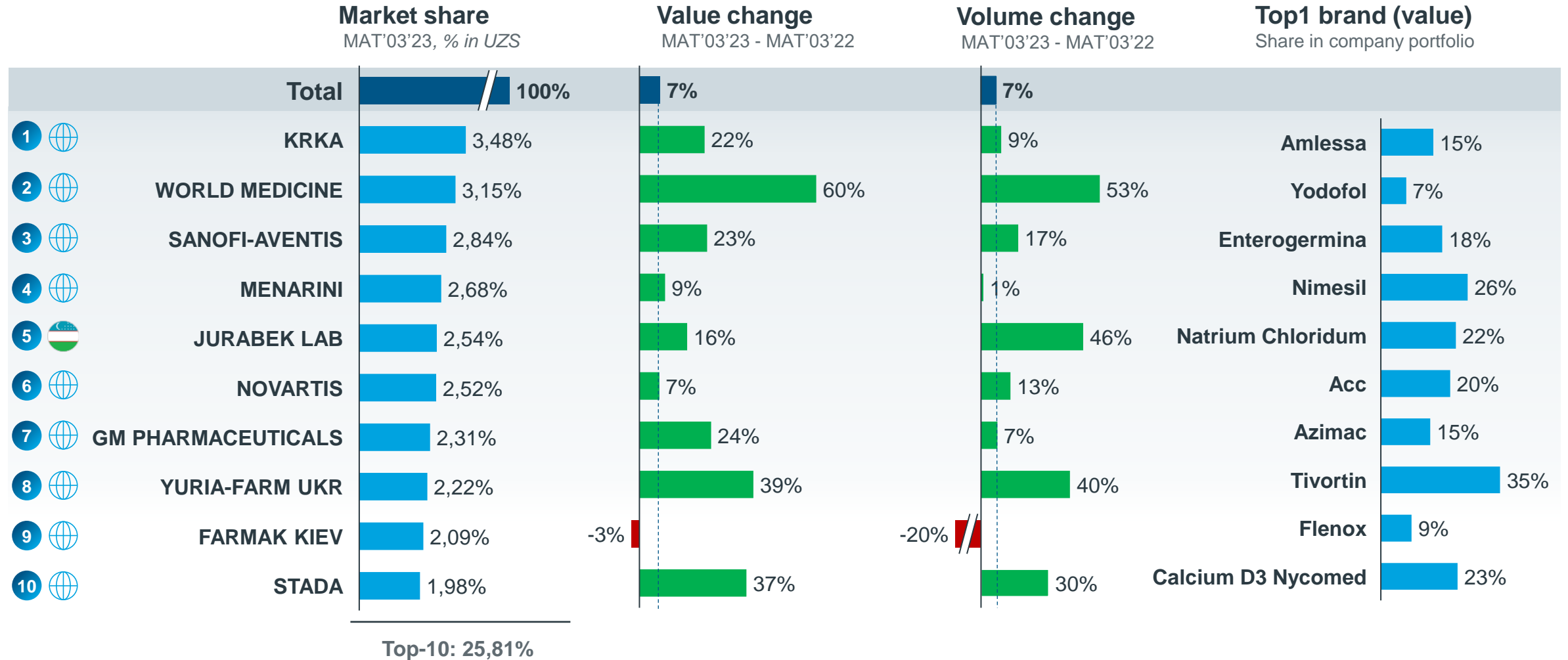
| Indicator | UZS | USD | EURO | Packs | SU |
|----------------------|----------|-----|------|-------|-------|
| Value MAT'03'23, Bln | 19 906,8 | 1,8 | 1,7 | 1,0 | 22,1 |
| Growth 23/22, % | 7% | 3% | 15% | 7% | -2,5% |

FACTS from IQVIA | Copyright © 2022 IQVIA. All rights reserved.
Source: IQVIA database (Retail, Hospital); Trade price



Most Top-10 companies have demonstrated significant sales growth both in value and volume terms in latest period

Top-10 overall ranking of companies by sales

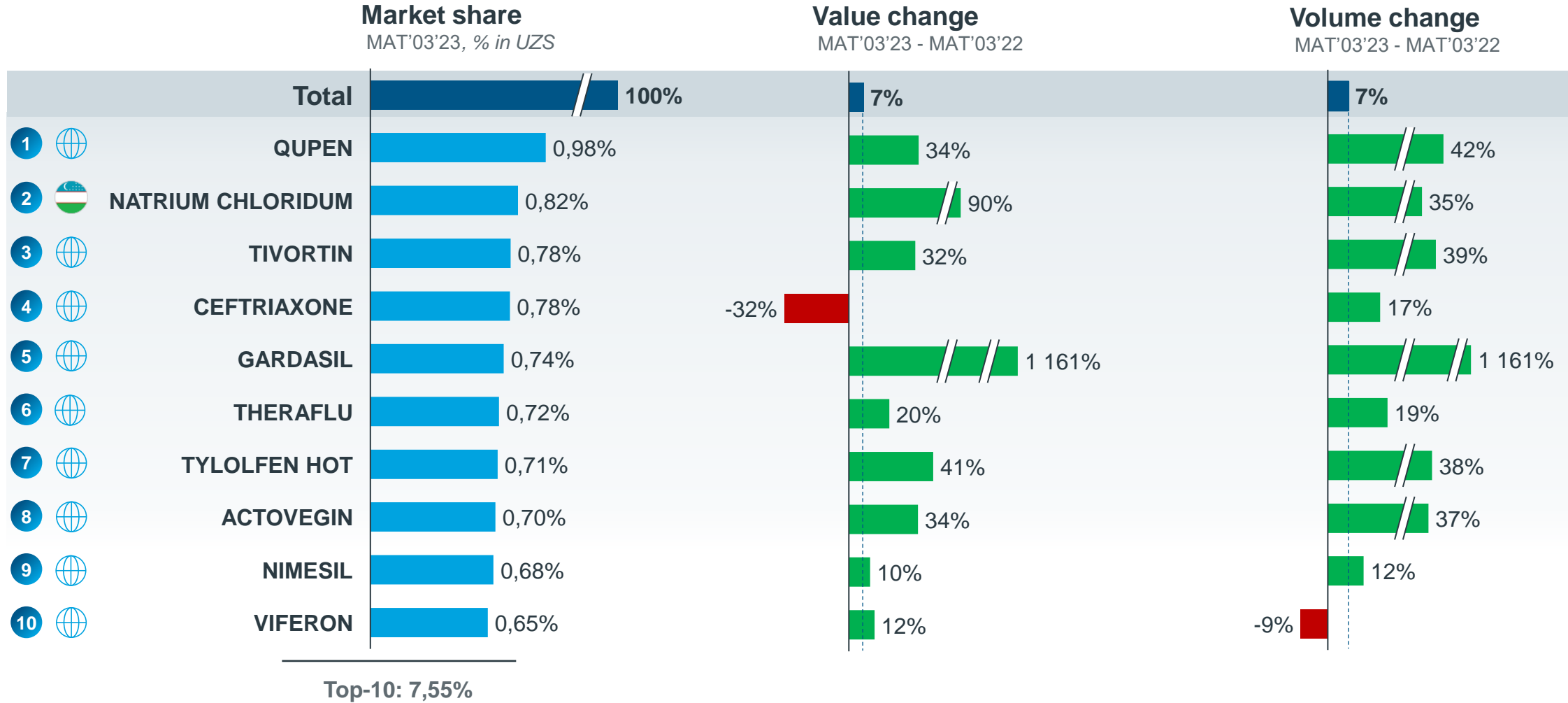


Total pharmaceutical market overview



There is only one local brand among Top-10 generating significant growth vs PY in value and volume terms

Top-10 overall ranking of brands by sales



Total pharmaceutical market overview

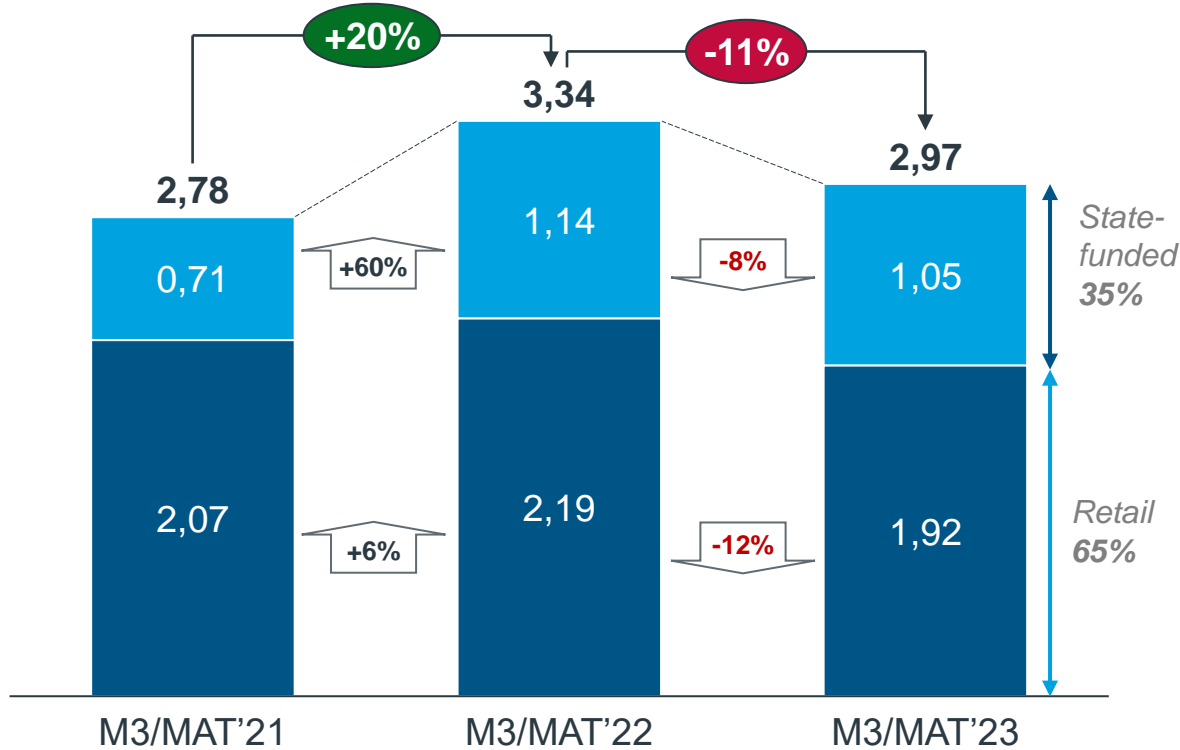


Belarus pharma market drops in value and volume terms both in retail and state-funded channels

Total pharma market by channels

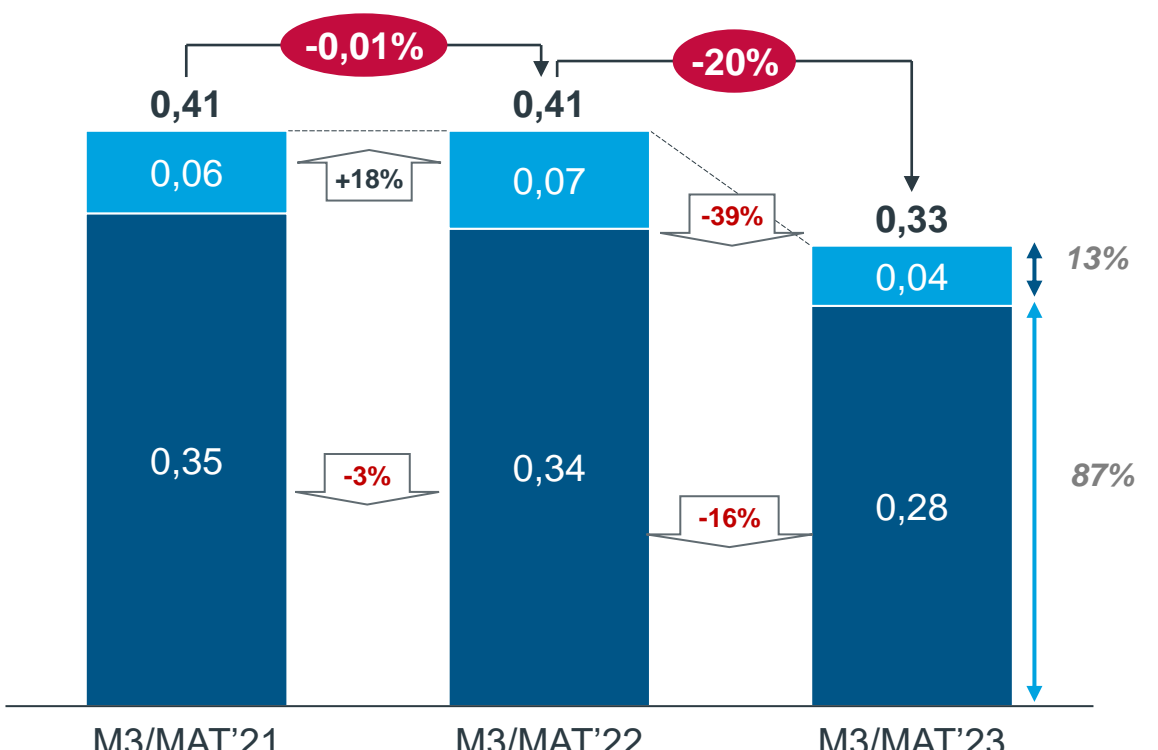
Total Sales by Value

Bln BYN



Total Sales by Volume

Bln Packs



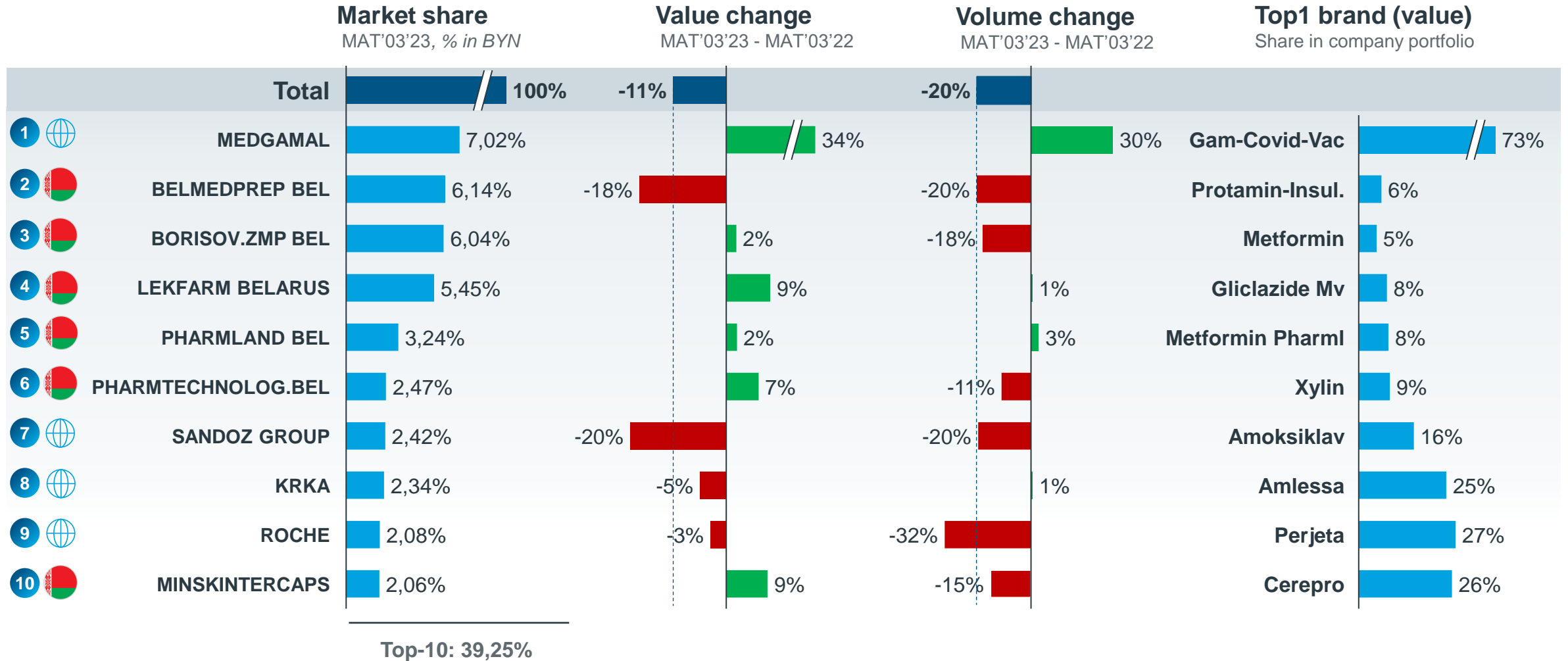
■ Hospital ■ Retail

| Indicator | BYN | USD | EURO | Packs | SU |
|----------------------|------|------|------|-------|-------|
| Value MAT'03'23, Bln | 3,0 | 1,1 | 1,1 | 0,3 | 14,1 |
| Growth 23/22, % | -11% | -12% | -1% | -20% | -6,6% |

Top-10 companies demonstrate controversial dynamic; 6 out 10 companies are local ones



Top-10 overall ranking of companies by sales

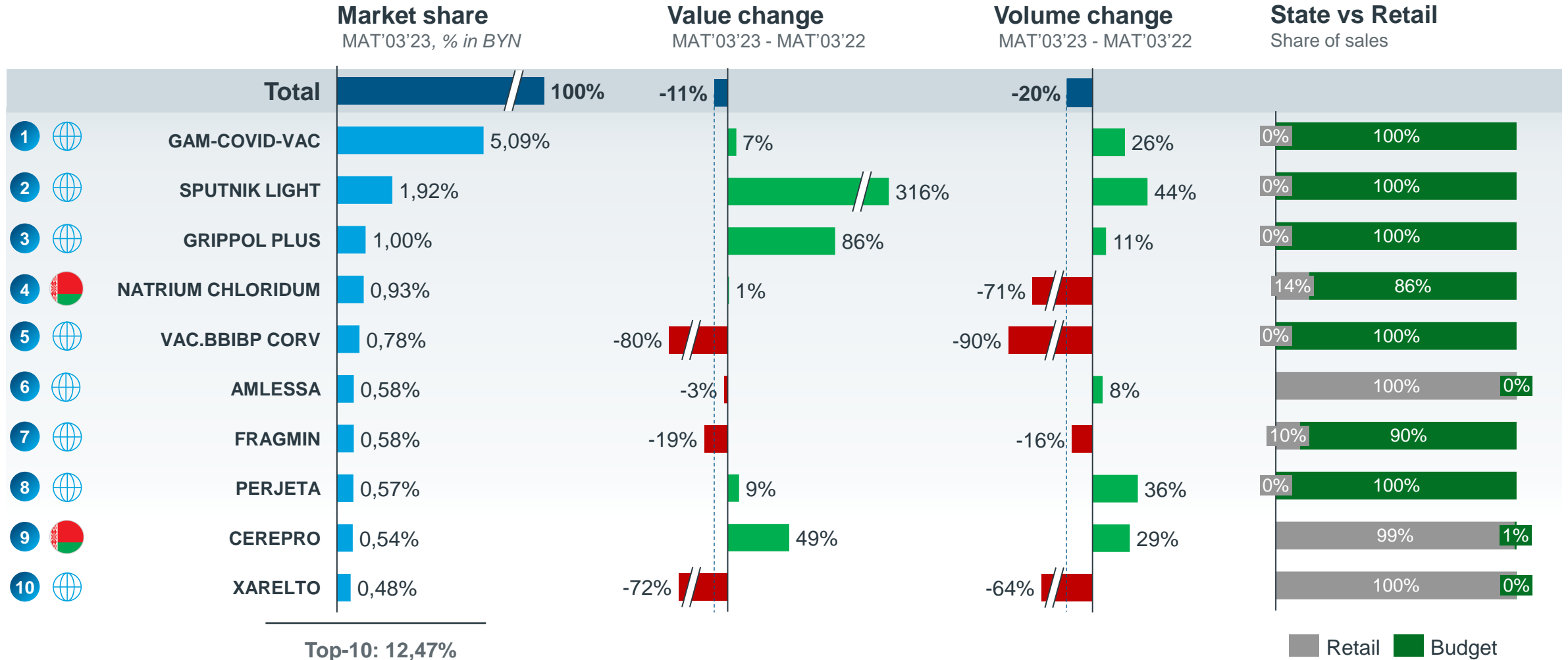


Total pharmaceutical market overview



Most Top-10 brands generate their sales in the state-funded segment; there are two local brands among Top-10

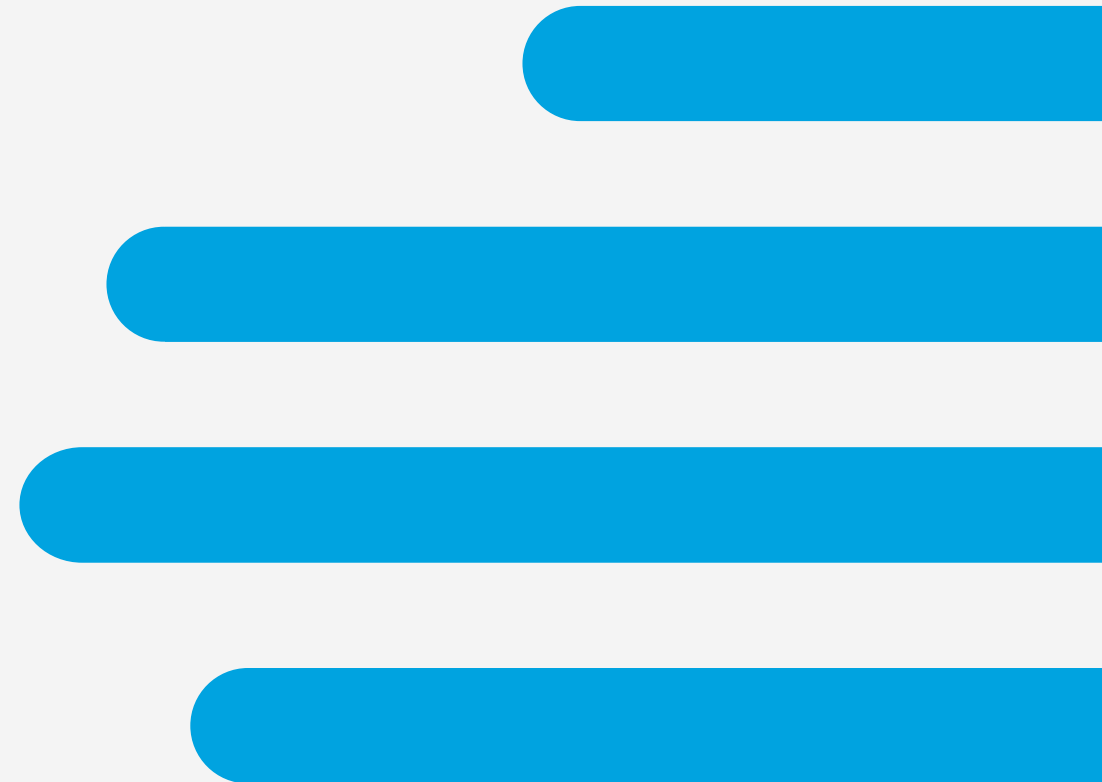
Top-10 overall ranking of brands by sales



Total pharmaceutical market overview

09

IQVIA offerings





INFORMATION



Pharma market audit

- Retail audit - Sell-In и Sell-out (monthly and weekly)
- Budget audit – Public, DLO, RLO
- Tenders and auctions
- E-commerce
- Monitoring of product prices



Channel Dynamic

- Monitoring of traditional and digital promotional activities directed to physicians and pharmacies (SoV)



OneKey

- >700k physicians / specialists
- >100k medical organizations
- >65k pharmacies
- 100% compliance to FL-152



DCD & MDLP

- Distributors' data processing and consolidation
- Serialization data processing and consolidation



LRx RPA

- Drugs prescriptions by indication
- RWE / RWD



TECHNOLOGY



Customer engagement

- MyCRM (local CRM solution)
- OCE: personal / digital (global CRM solution)
- Solutions for creating and managing CLM content



Compliance solutions

- Consent collection, storage and management (IQVIA Consent)
- Quality Management System at production site (eQMS)
- Pharmacovigilance process management system
- Fair Market Value (fair payments to KOLs and HCPs)



Business Intelligence

- Integrated solutions: reporting and data visualization



CONSULTING



Commercial Effectiveness

- Sales Force sizing and deployment
- Territory prioritization
- Pharmacy and physicians' segmentation
- ROI analysis of trade marketing activities
- KPI framework development
- Разработка и оценка KPIs



Management Consulting

- Commercial Due Diligence
- Portfolio strategy & targets' search
- Global market expansion
- Go-to-Market strategy
- Pricing and Market Access
- Launch Excellence
- Promo Mix Optimization
- Market landscape & forecasting



Primary Market Research

- In-depth interviews and focus-groups with various groups of stakeholders (KOLs, HCPs, pharmacists, consumers)
- Ad-hoc проекты: U&A, Price elasticity, Rep checks, KOLs mapping etc.
- Syndicated studies

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