

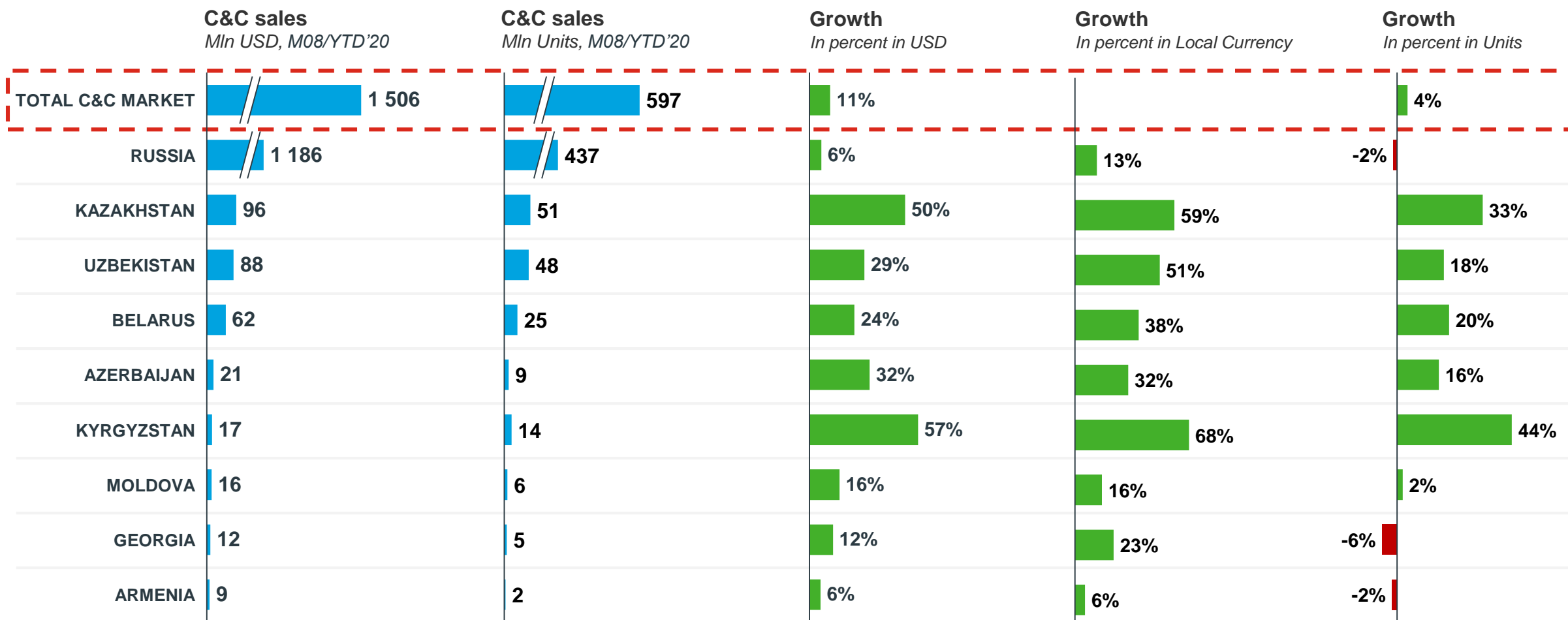


# Facts from IQVIA

M08 2020

# EAEU & CIS, Russia Cough&Cold category in January-August 2020, Value in Mln. USD and Units

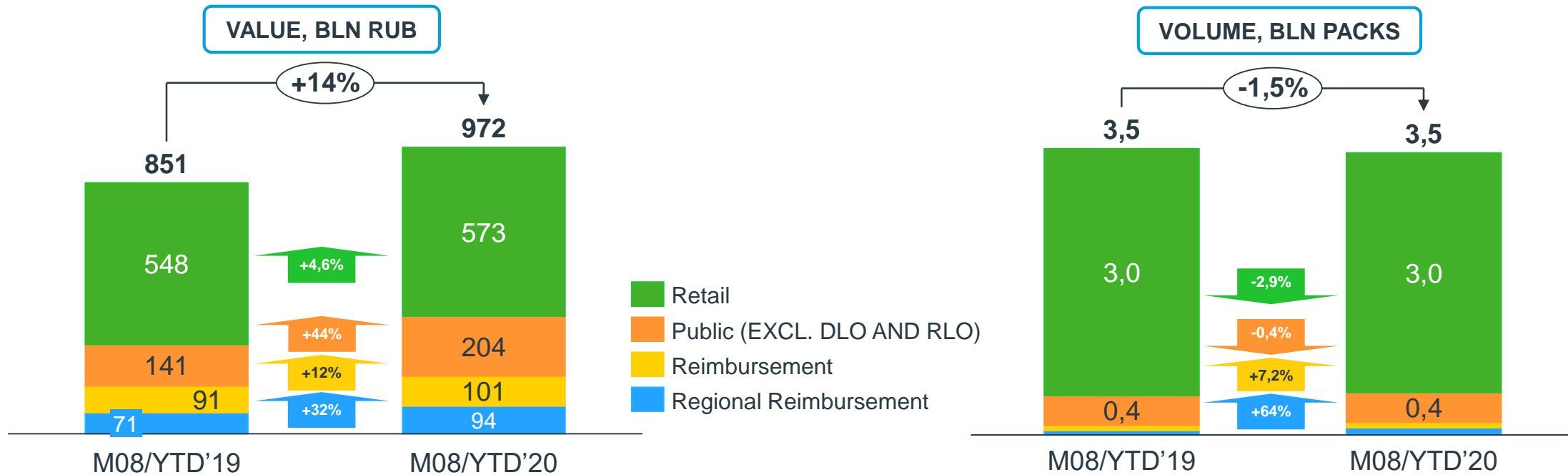
C&C increases by 11% in USD and by 4% in volume





# Russian pharma market growth in January-August 2020

Market grew by 14% in value and decreased by 1,5% in volume

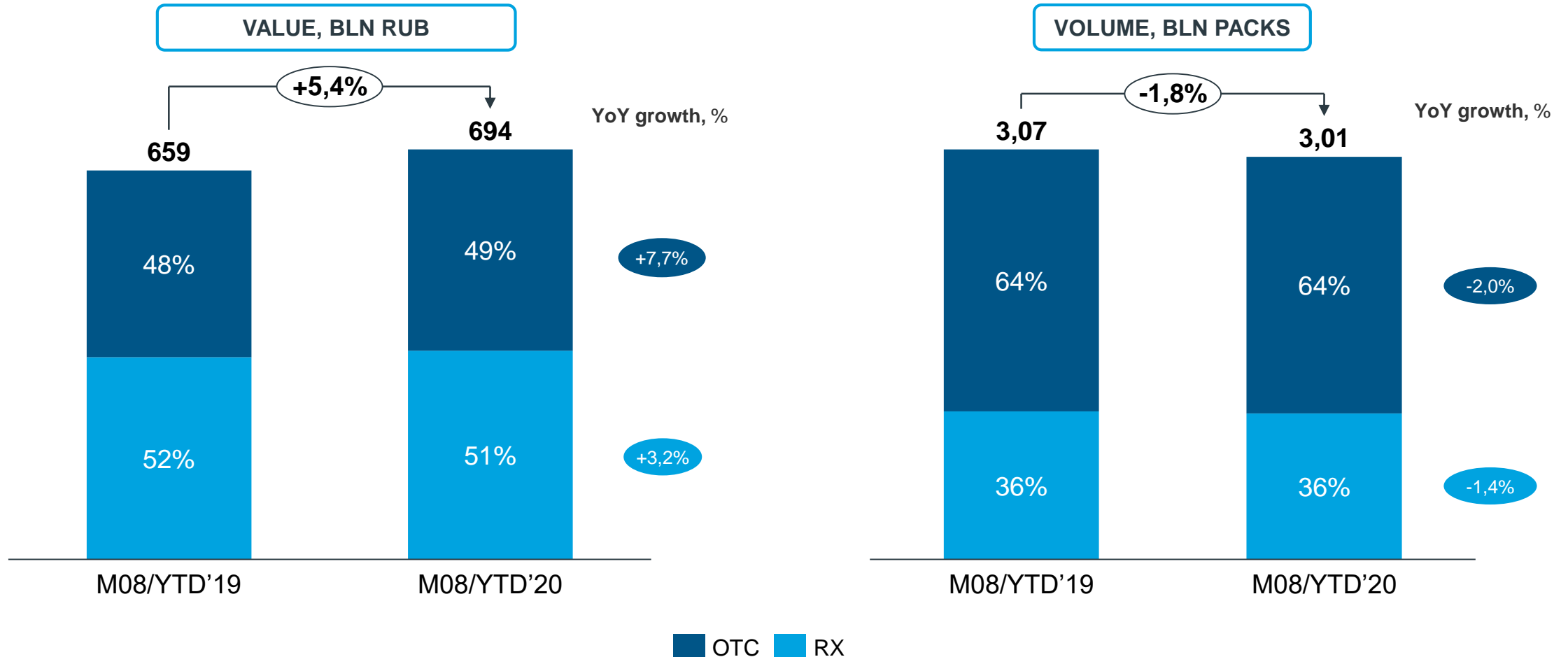


Indicator	RUB	USD	EUR	PACKS
Value M08/YTD'20, Bln.	972	14	12	3,5
Growth M08/YTD'20%	▲ 14%	▲ 5,9%	▲ 6,9%	▼ -1,5%

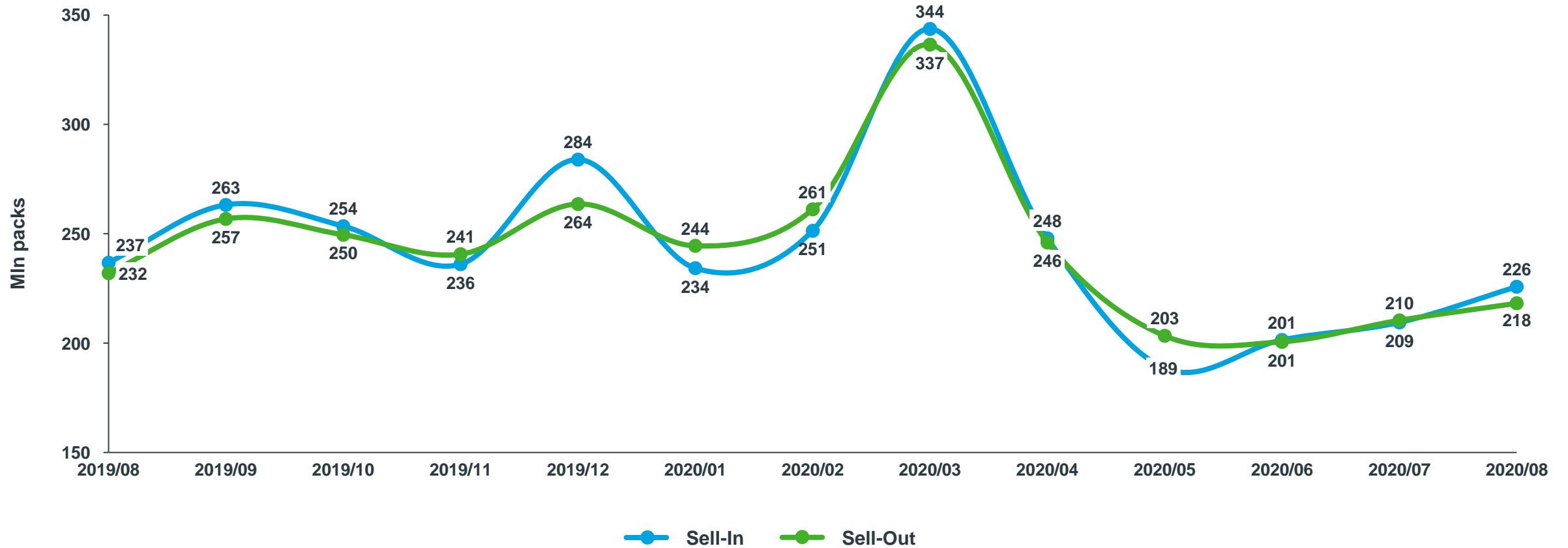


# Russian pharma market growth in January-August 2020

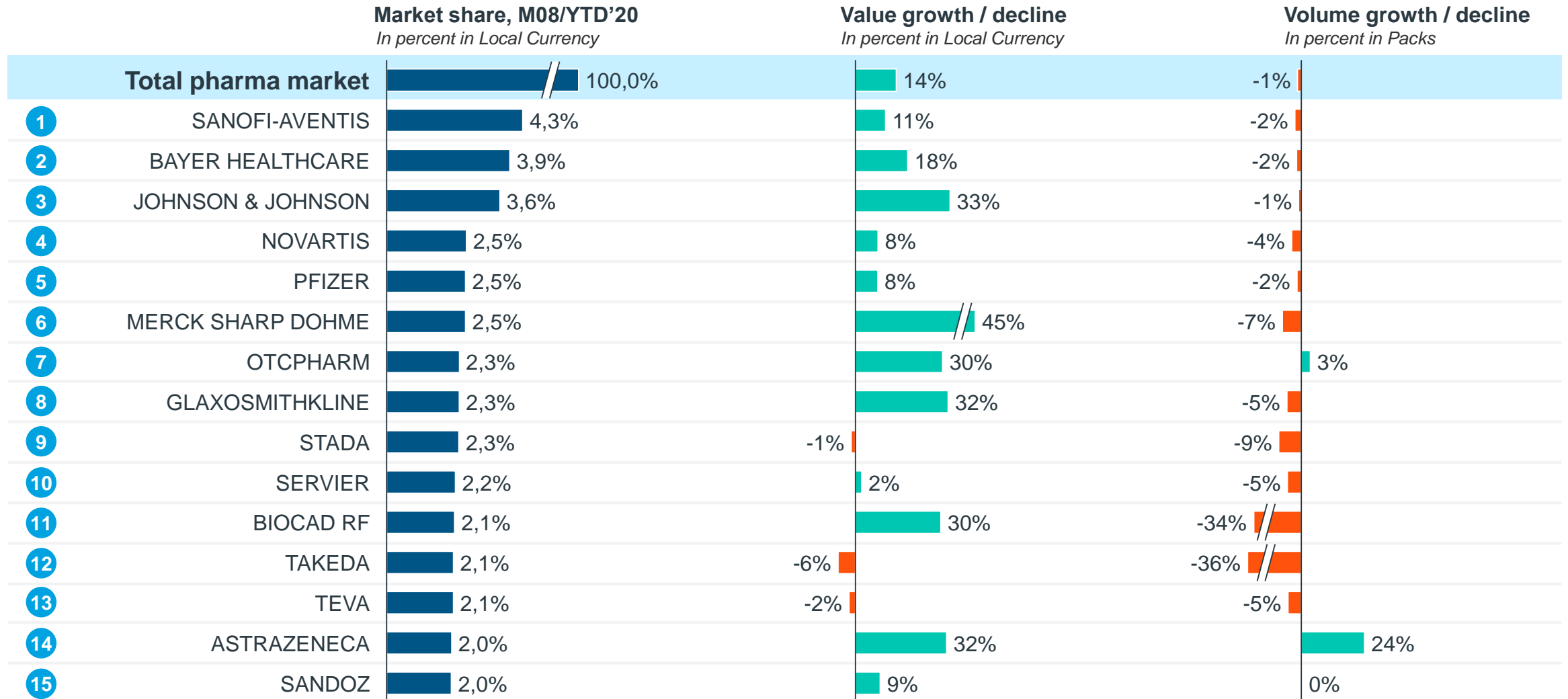
Retail Sell-Out: Market grew by 5,4% in value and decreased by 1,8% in volume



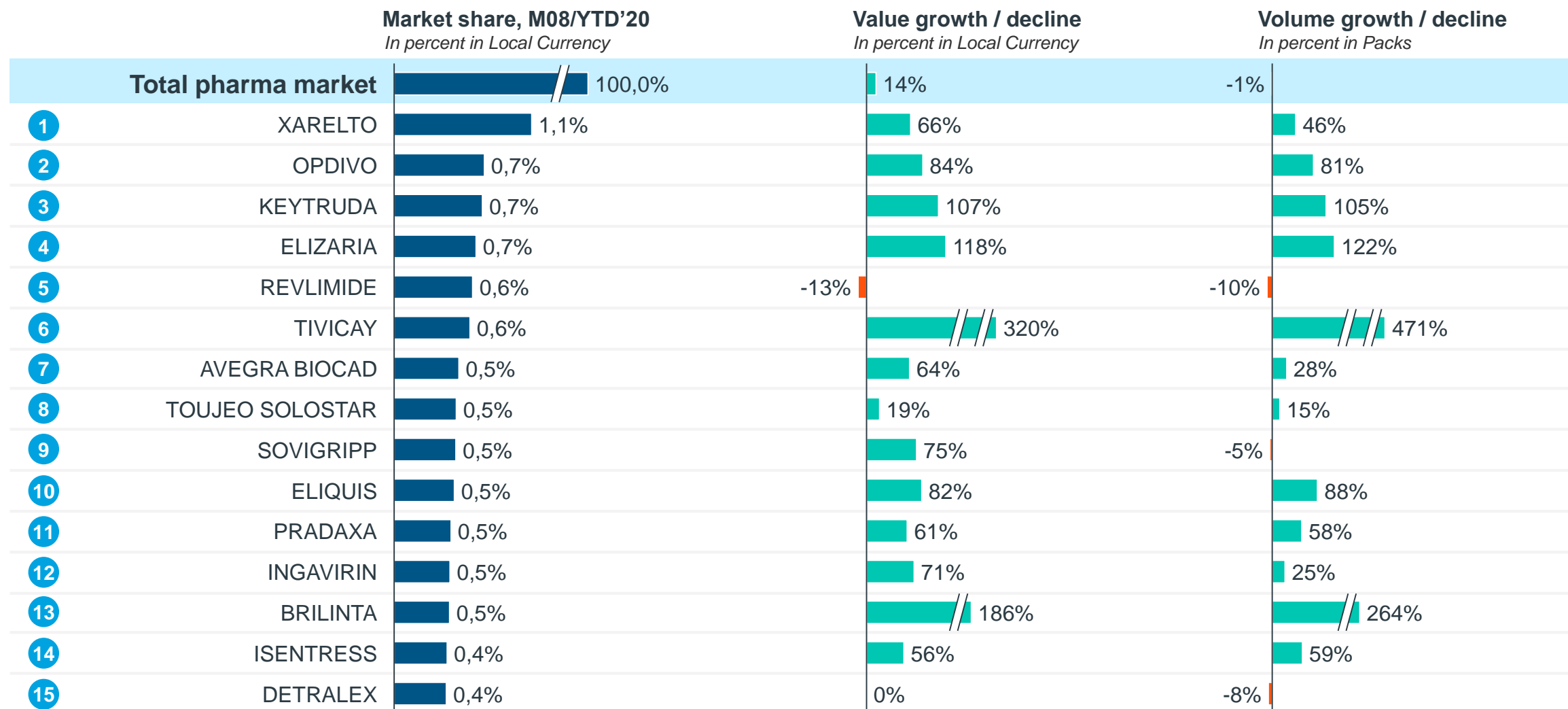
# Sell-In vs Sell-Out, OTC registered drugs



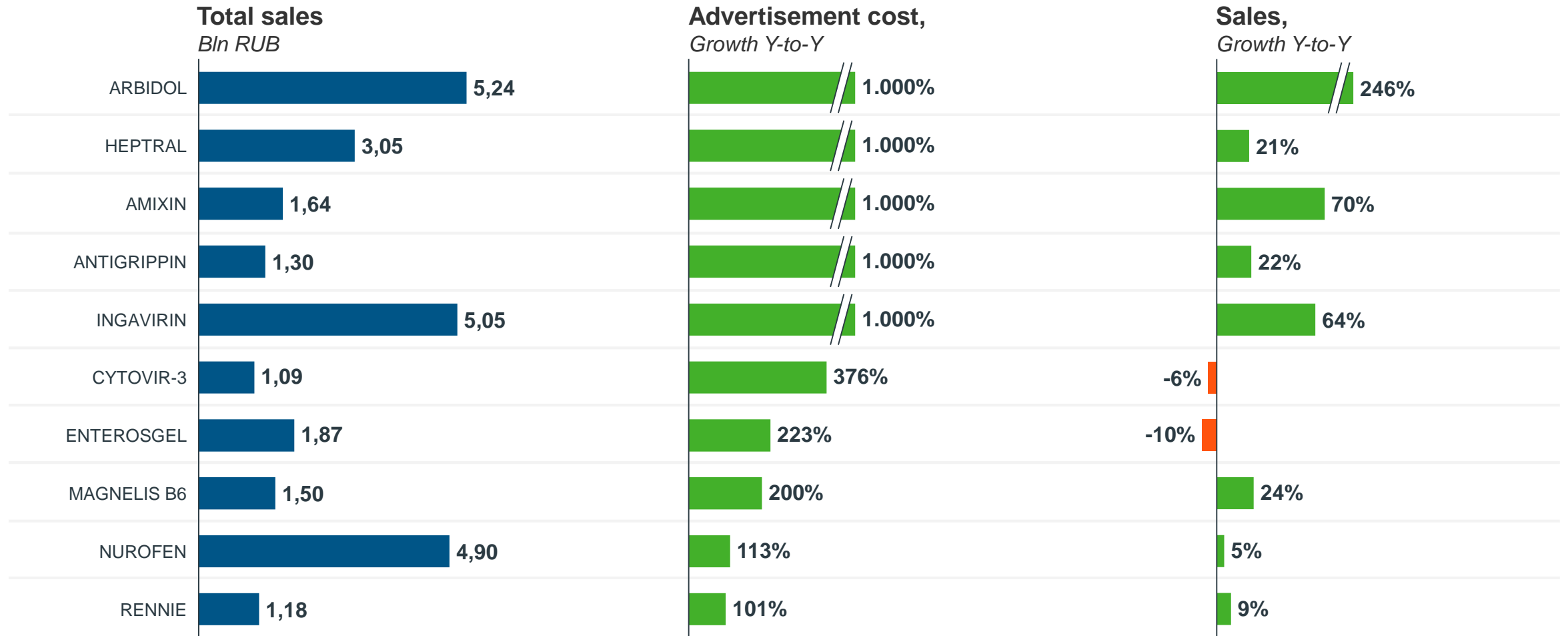
# TOP-15 corporations on Russian market, January-August 2020



# TOP-15 brands on Russian market, January-August 2020



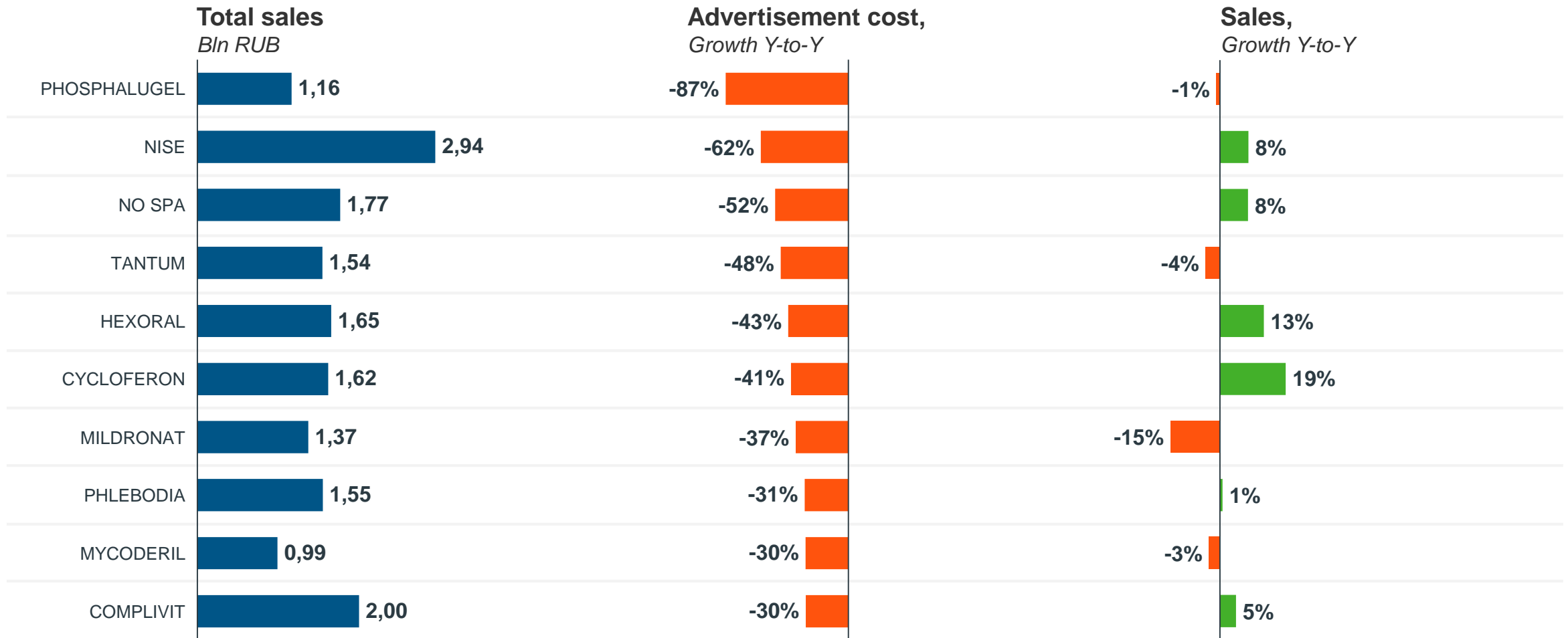
# TOP-10 products by growth in advertisement investments in January-August 2020



The rank is calculated among TOP-200 Brands by sales with advertising cost greater than 50 mln RUB  
 Source: IQVIA databases. Pharamtrend, Mediascope data, FIN Prices



# TOP-10 products by decline in advertisement investments in January-August 2020



The rank is calculated among TOP-200 Brands by sales with advertising cost greater than 50 mln RUB  
 Source: IQVIA databases. Pharmatrend, Mediascope data, FIN Prices

# IQVIA held Rx Awards 2020



For the 4th year in a row, IQVIA held the **IQVIA Awards** as part of IQVIA Client day. This year nominations celebrated best performers in Rx Retail and Public markets. Despite challenging times, six leaders demonstrated exceptional growth figures measured by **IQVIA PharmaTrend** (*Retail pharmacy off-take audit*) and **IQVIA Public audits**. More than 200 people that joined **IQVIA Client Day** live webinar, cheered the **winners in the following categories:**

**No. 1  
Rx brand  
in Retail**

*(annual absolute sales growth in rubles):*

**Eliquis**

**No. 1  
Rx company  
in Retail**

*(annual absolute sales growth in rubles):*

**KRKA**

**No. 1  
Rx launch  
in Retail**

*(sales volume in rubles generated in the first 6 months of sales):*

**Lidamitol**

**No. 1  
Rx brand  
in Public**

*(annual absolute sales growth in rubles):*

**Elizaria**

**No. 1  
Rx company  
in Public**

*(annual absolute sales growth in rubles):*

**MSD**

**No. 1  
Rx launch  
in Public**

*(sales volume in rubles generated in the first 6 months of sales):*

**Elizaria**

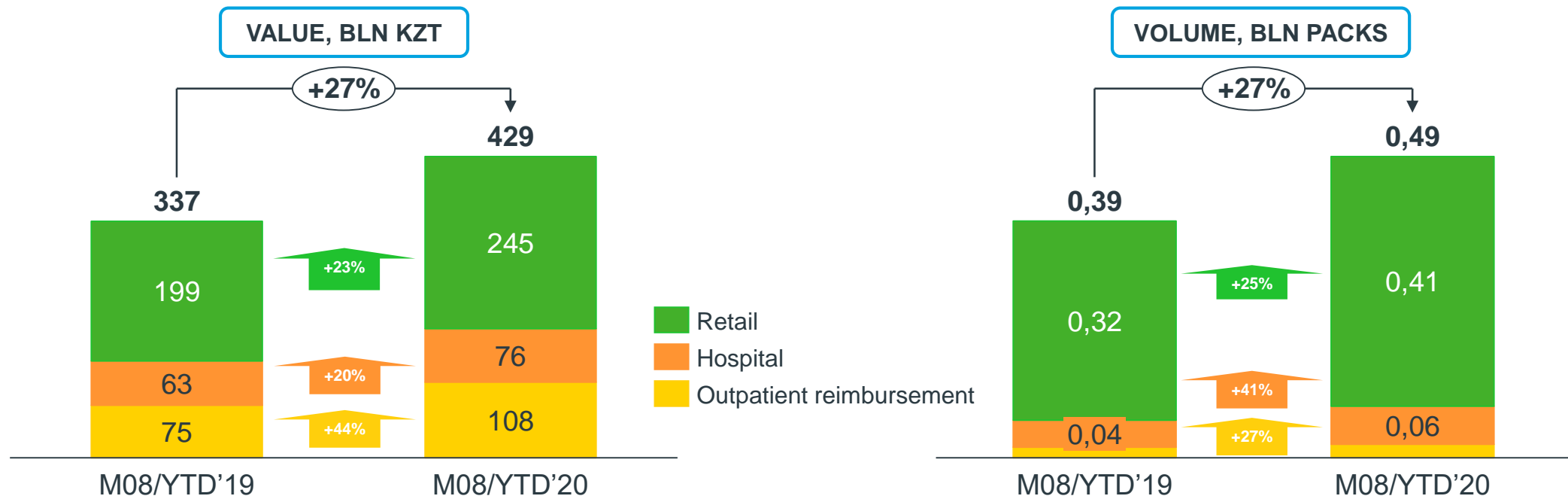


We congratulate the winners of all nominations and look forward to the results of the next year!



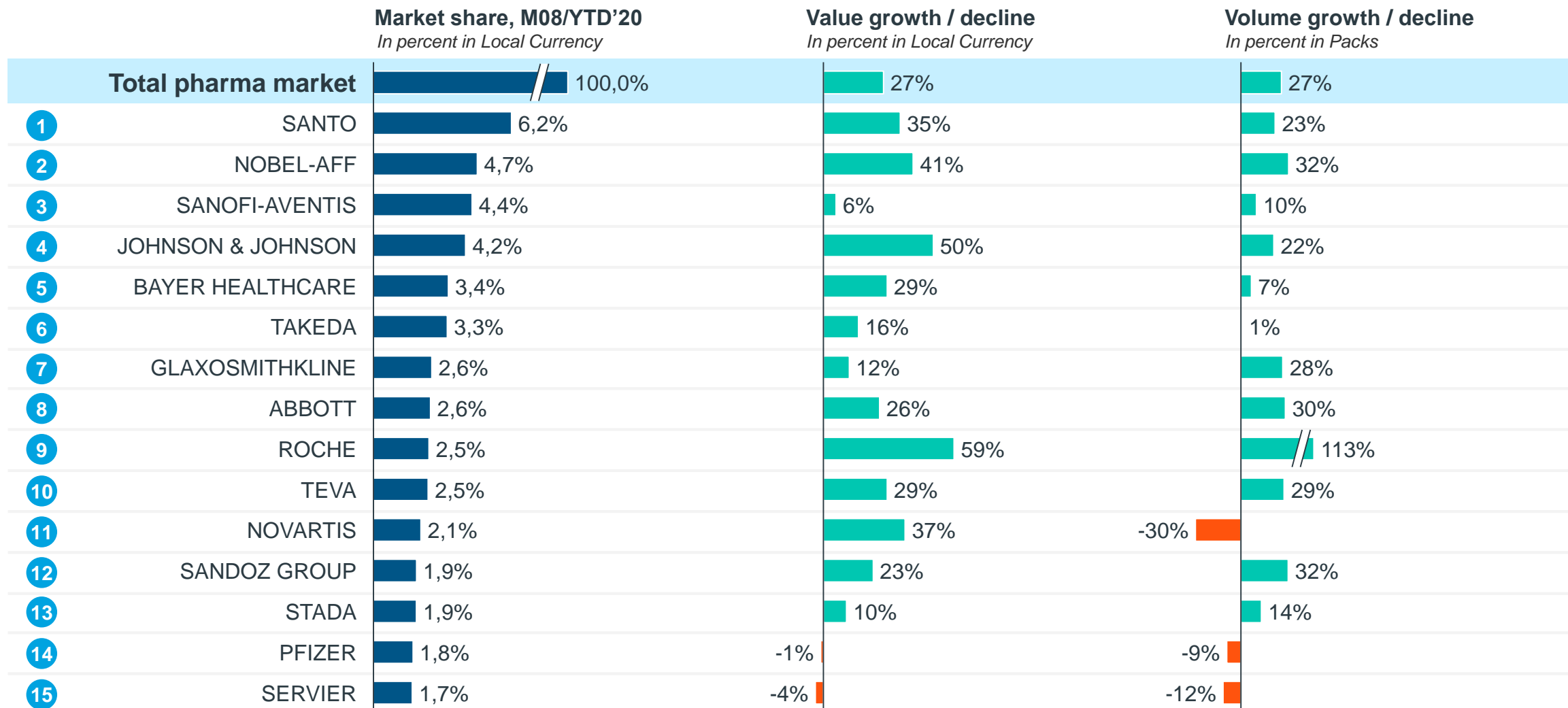
# Kazakhstan pharma market growth in January-August 2020

Market grew by 27% in value/volume



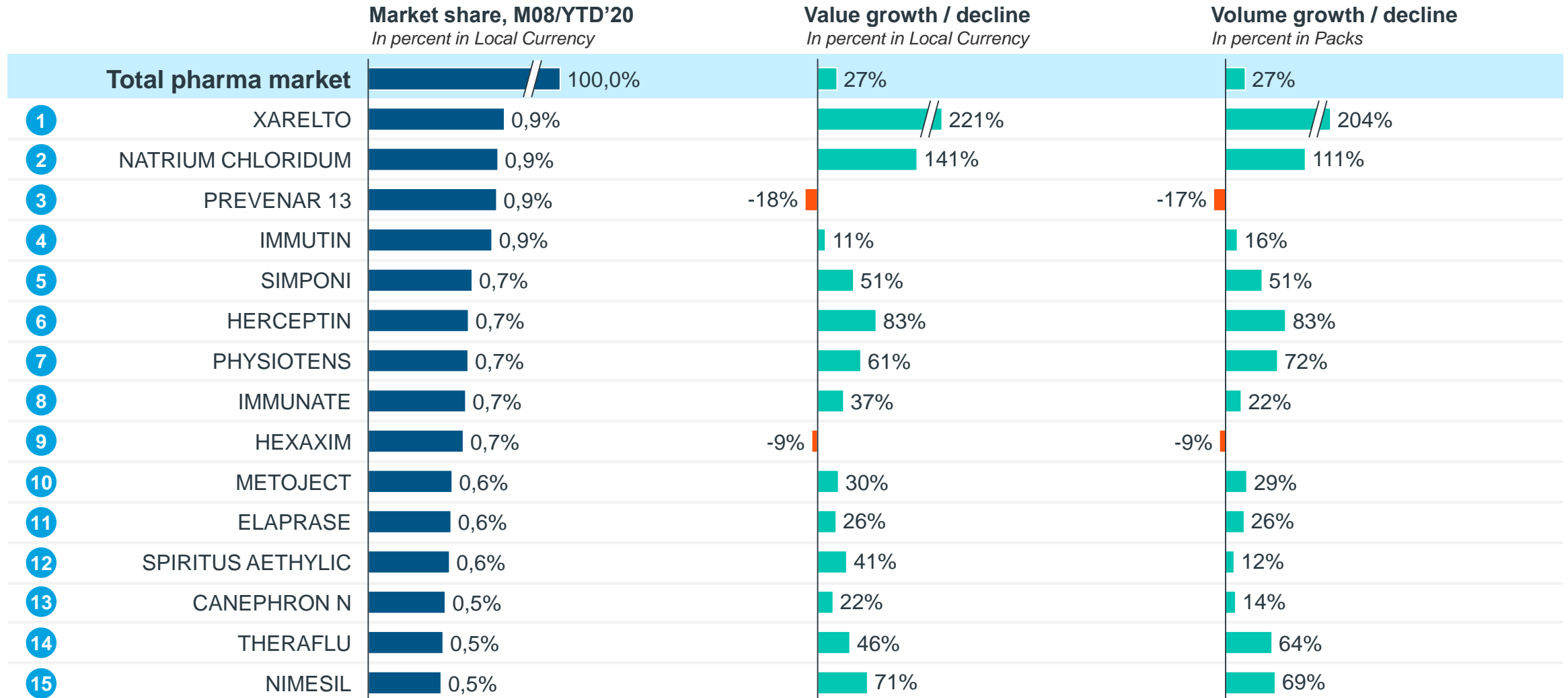
Indicator	KZT	USD	EUR	PACKS
Value M08/YTD'20, Bln.	429	1,06	0,95	0,49
Growth M08/YTD'20%	▲ 27%	▲ 19%	▲ 20%	▲ 27%

# TOP-15 corporations on Kazakhstan market, January-August 2020





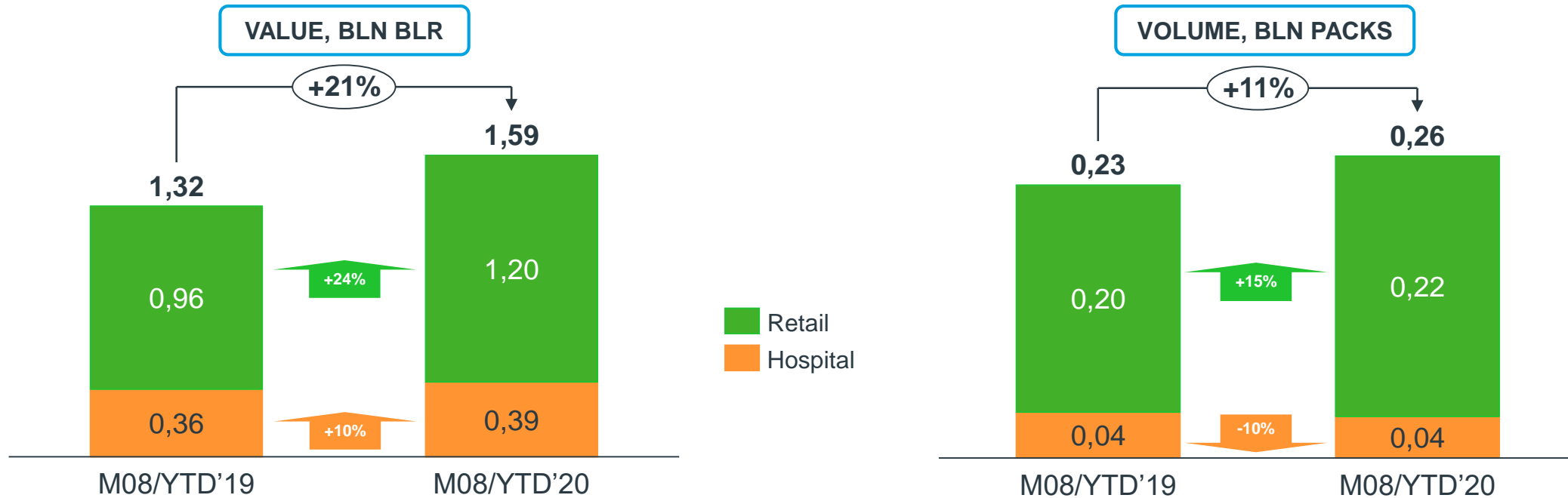
# TOP-15 brands on Kazakhstan market, January-August 2020





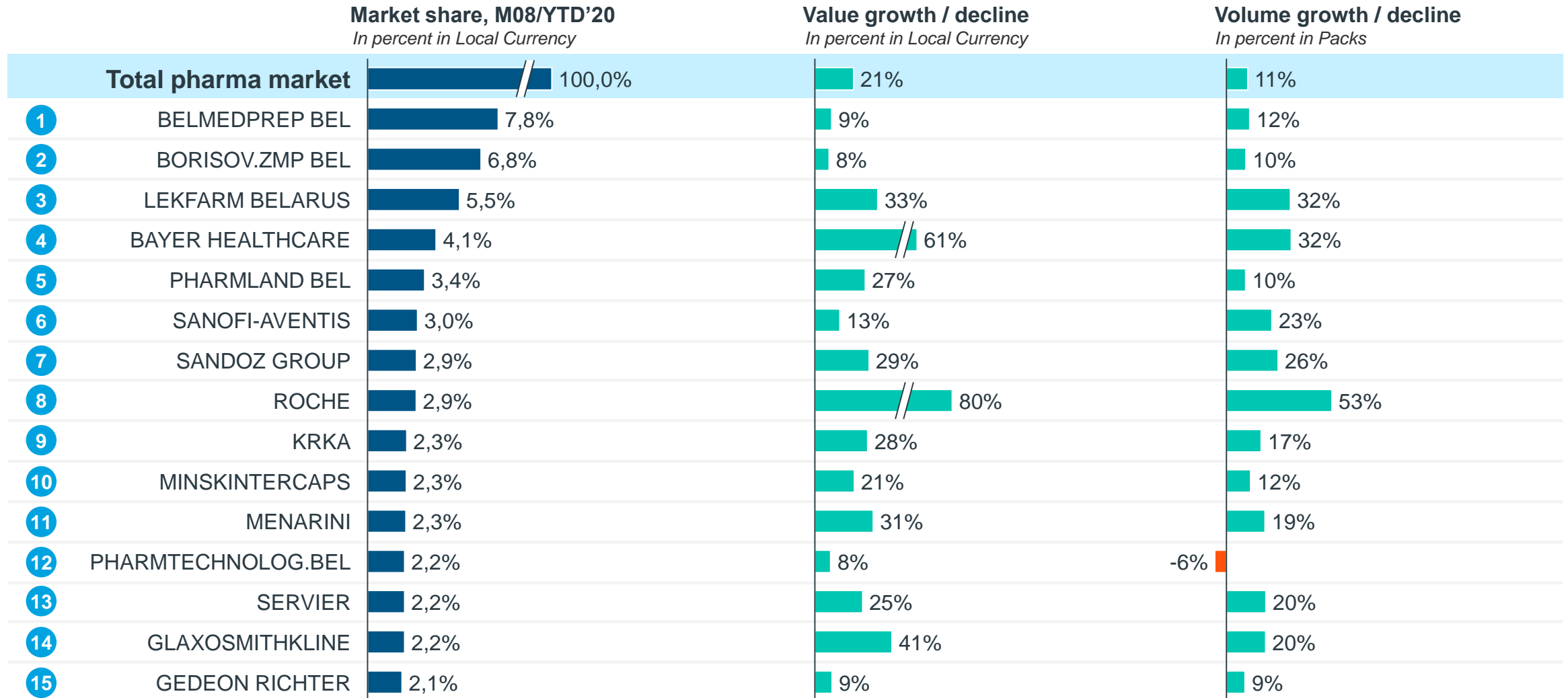
# Belarus pharma market growth in January-August 2020

Market grew by 21% in value and by 11% in volume



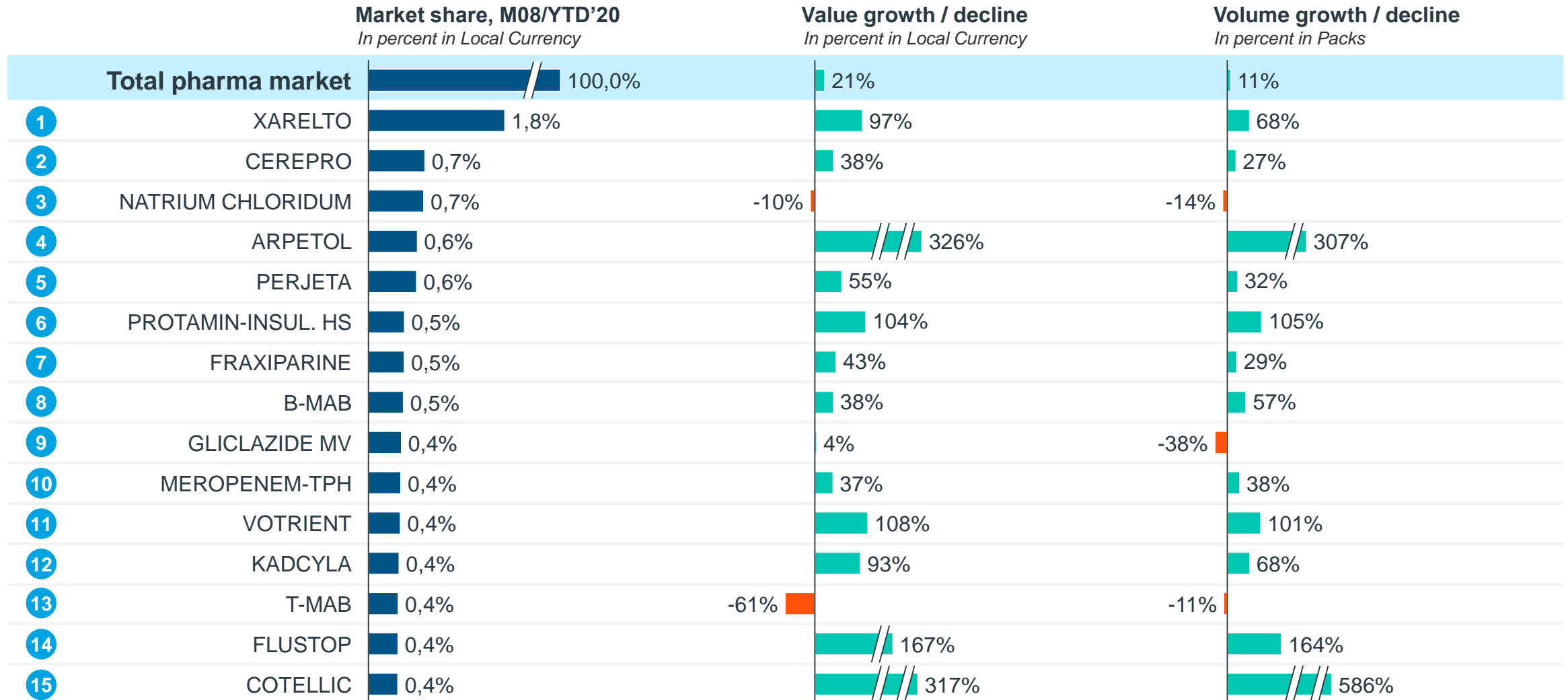
Indicator	BLR	USD	EUR	PACKS
Value M08/YTD'20, Bln.	1,59	0,67	0,60	0,26
Growth M08/YTD'20%	▲ 21%	▲ 7,0%	▲ 8,1%	▲ 11%

# TOP-15 corporations on Belarus market, January-August 2020





# TOP-15 brands on Belarus market, January-August 2020

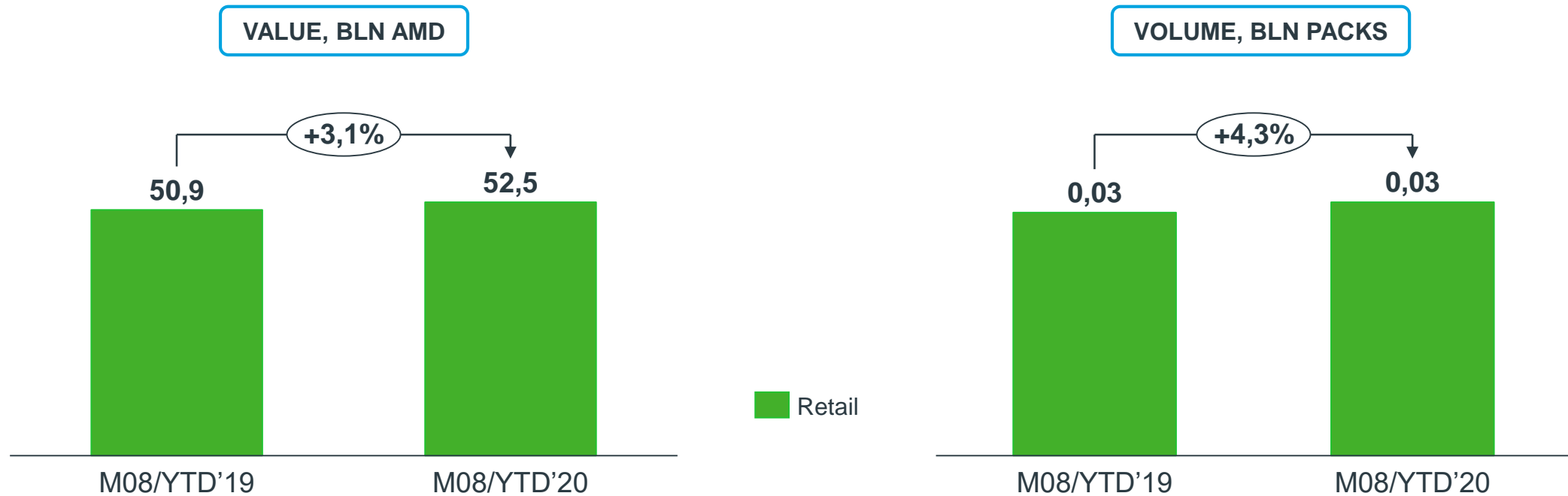






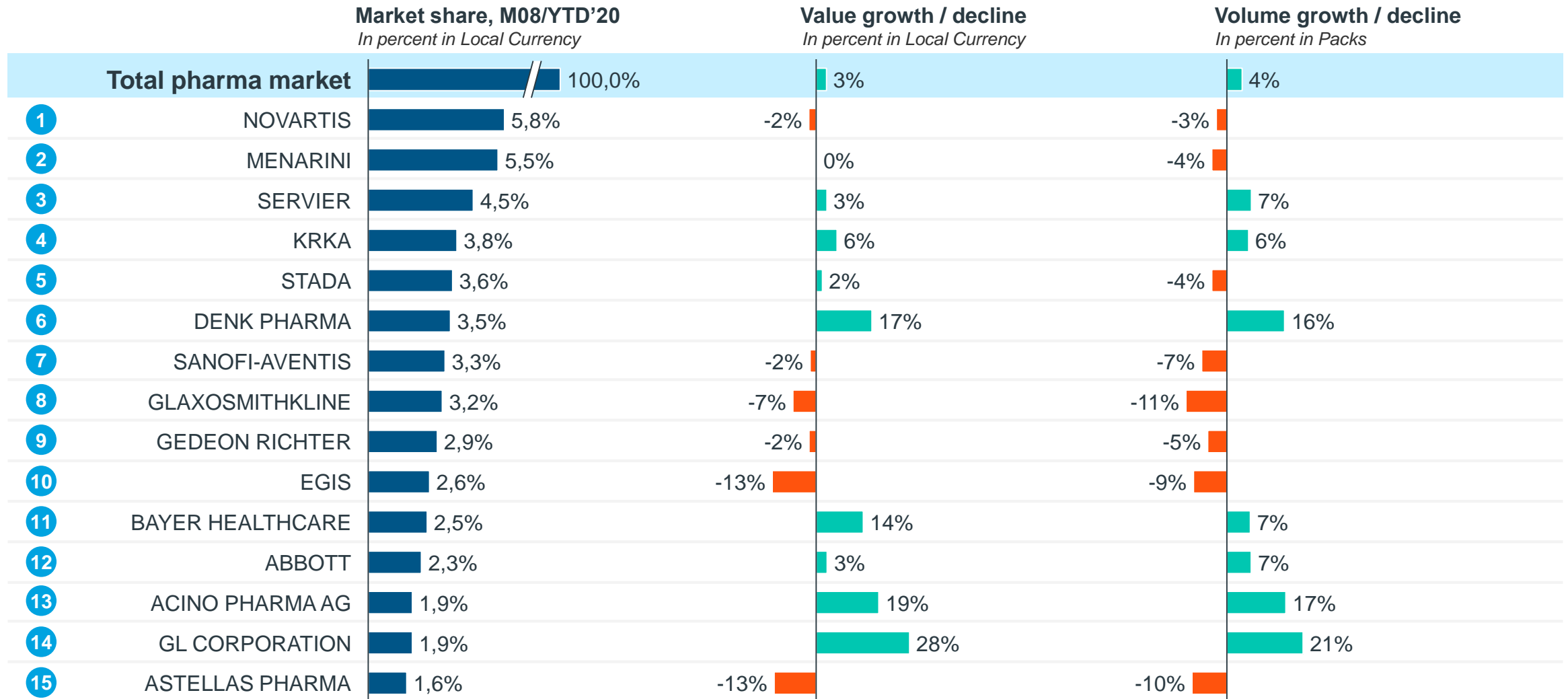
# Armenia pharma market growth in January-August 2020

Market increased by 3,1% in value and by 4,3% in volume



Indicator	AMD	USD	EUR	PACKS
Value M08/YTD'20, Bln.	52,5	0,1	0,1	0,03
Growth M08/YTD'20%	▲ 3,1%	▲ 2,8%	▲ 3,5%	▲ 4,3%

# TOP-15 corporations on Armenia market, January-August 2020





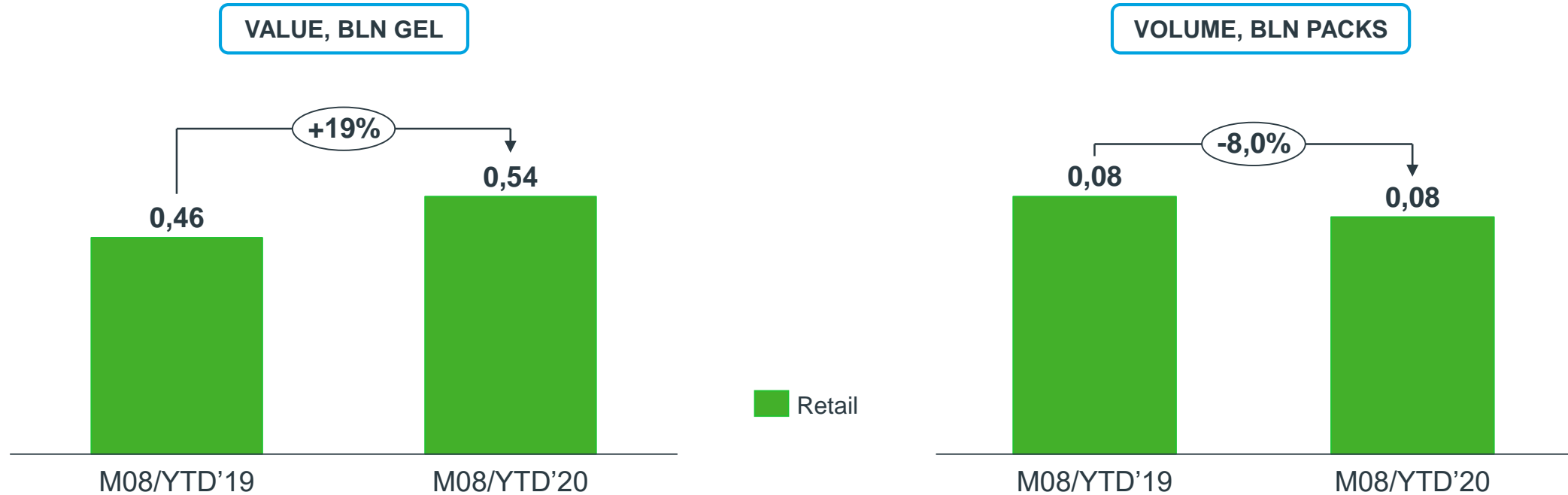
# TOP-15 brands on Armenia market, January-August 2020

		Market share, M08/YTD'20 <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%	3%	4%
1	XARELTO	1,2%	48%	62%
2	TRIPLIXAM	1,2%	13%	20%
3	ETHANOL	0,9%	150%	197%
4	CARDIOMAGNYL	0,9%	10%	12%
5	VITAMIN D3	0,8%	39%	24%
6	PRESTANCE	0,7%	6%	13%
7	CONCOR	0,7%	6%	9%
8	NIMESIL	0,6%	12%	7%
9	DUPHASTON	0,5%	3%	4%
10	ACTOVEGIN	0,5%	-14%	-11%
11	CEFTRIAXONE-ASTER	0,5%	39%	30%
12	GALVUS MET	0,5%	16%	23%
13	NOLIPREL FORTE ARG	0,4%	-3%	7%
14	SODIUM CHLORIDE	0,4%	0%	0%
15	CO-AMLESSA	0,4%	23%	22%



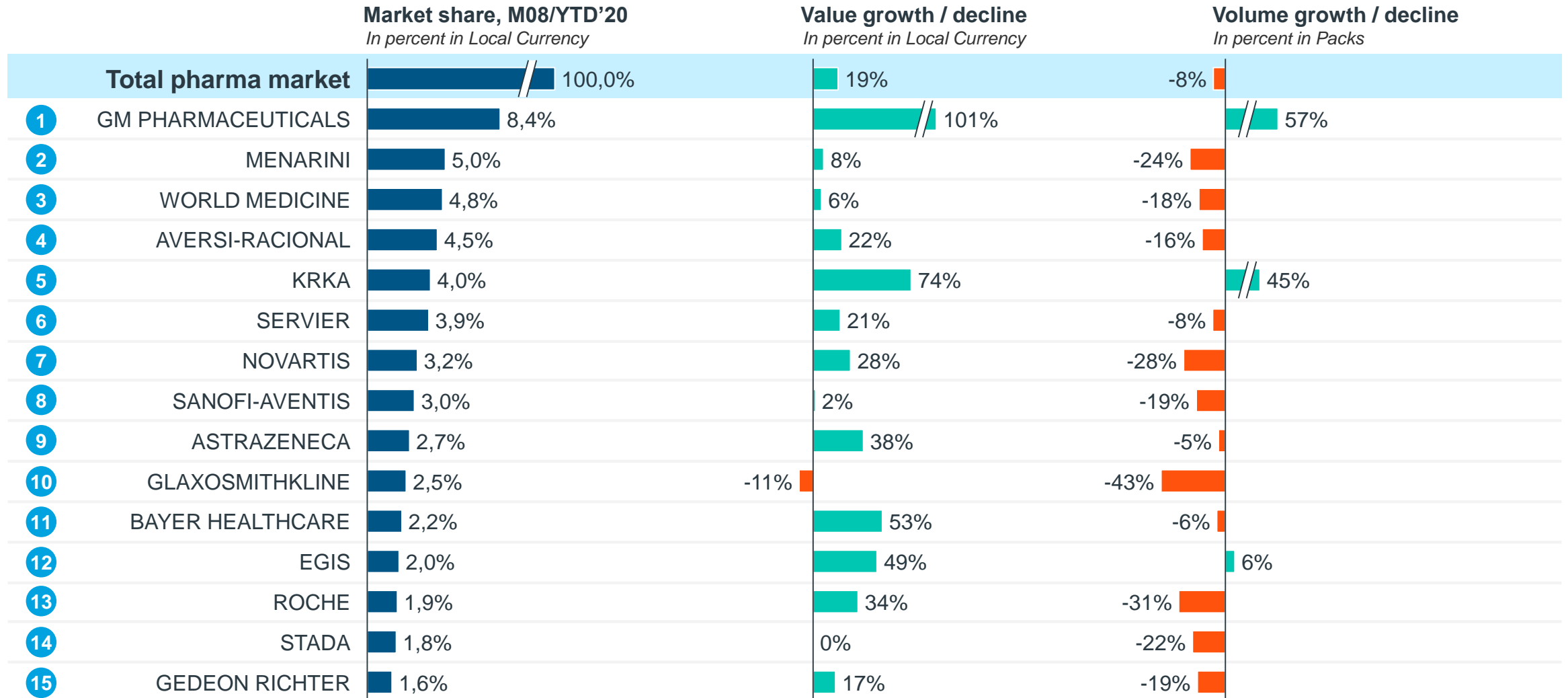
# Georgia pharma market growth in January-August 2020

Market grew by 19% in value and decreased by 8,0% in volume



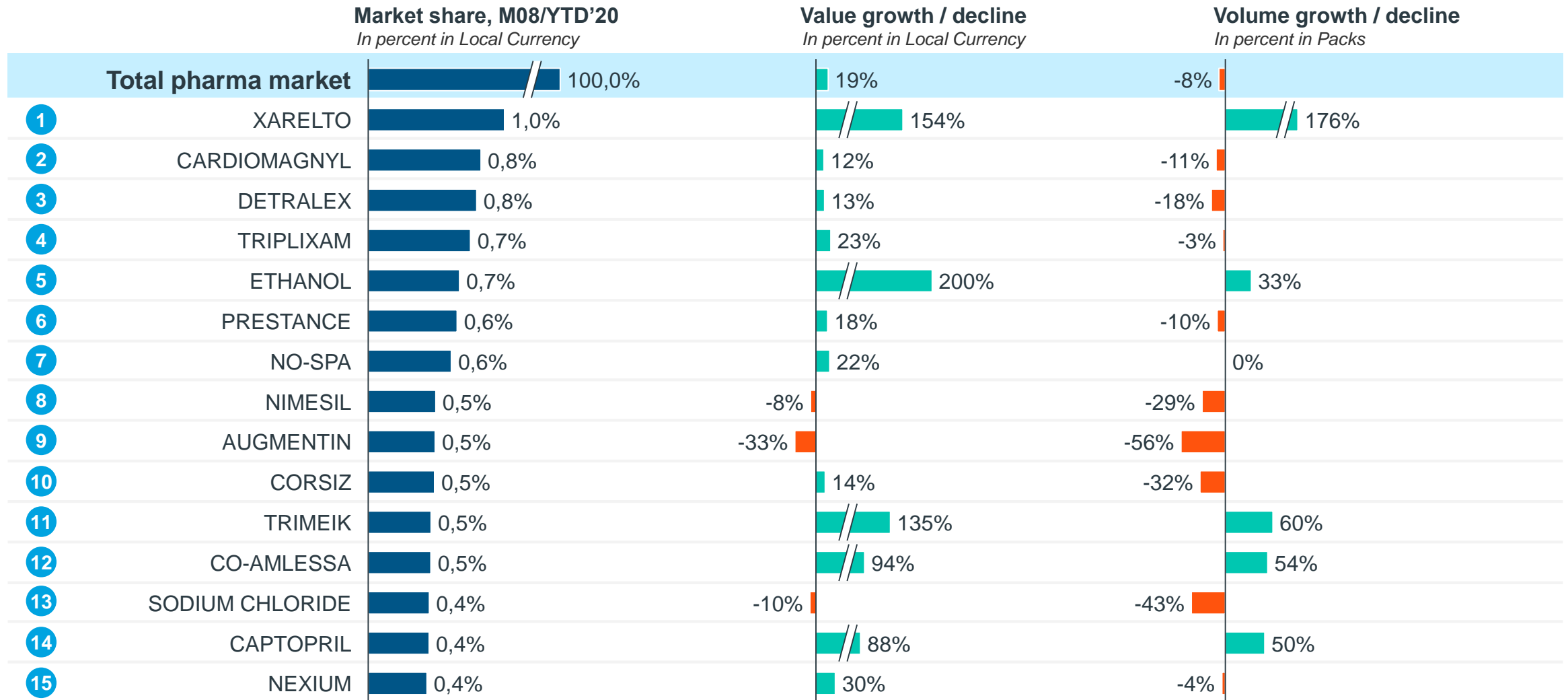
Indicator	GEL	USD	EUR	PACKS
Value M08/YTD'20, Bln.	0,5	0,2	0,2	0,08
Growth M08/YTD'20%	▲ 19%	▲ 8,1%	▲ 9,1%	▼ -8,0%

# TOP-15 corporations on Georgia market, January-August 2020





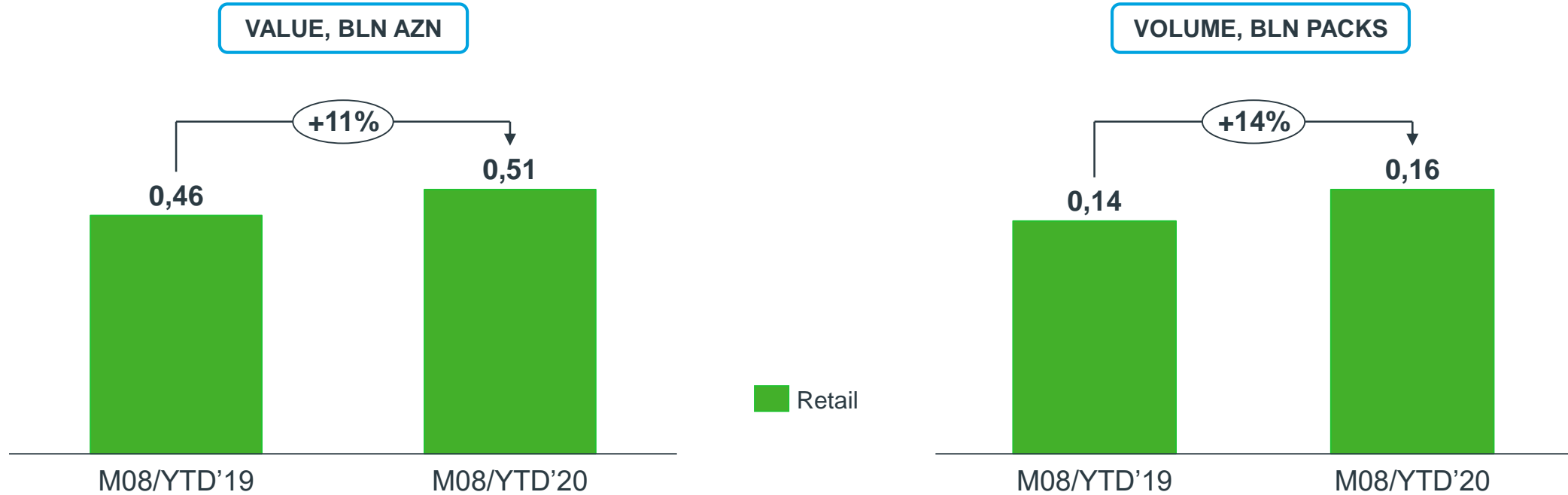
# TOP-15 brands on Georgia market, January-August 2020





# Azerbaijan pharma market growth in January-August 2020

Market grew by 11% in value and by 14% in volume



Indicator	AZN	USD	EUR	PACKS
Value M08/YTD'20, Bln.	0,5	0,3	0,3	0,16
Growth M08/YTD'20, %	▲ 11%	▲ 11%	▲ 12%	▲ 14%



# TOP-15 corporations on Azerbaijan market, January-August 2020

		Market share, M08/YTD'20 <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%	11%	14%
1	MENARINI	4,0%	17%	18%
2	NOVATOR PHARMA	3,3%	2%	9%
3	KRKA	3,1%	20%	13%
4	STADA	3,0%	19%	19%
5	SANOFI-AVENTIS	2,9%	9%	-5%
6	NOVARTIS	2,5%	15%	7%
7	GLAXOSMITHKLINE	2,1%	2%	0%
8	SERVIER	2,0%	13%	8%
9	BORISOV.ZMP BEL	1,7%	19%	15%
10	VEFA ILAC SANAYI	1,7%	23%	34%
11	EGIS	1,6%	11%	4%
12	ABBOTT	1,4%	20%	19%
13	HERBA FLORA	1,4%	26%	23%
14	ACINO PHARMA AG	1,4%	30%	23%
15	NOBEL ILAC SAN TUR	1,3%	7%	1%



# TOP-15 brands on Azerbaijan market, January-August 2020



		Market share, M08/YTD'20 <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%	11%	14%
1	ETHANOL	2,0%	251%	137%
2	NIMESIL	1,2%	17%	17%
3	RINGER`S SOLUTION	0,9%	66%	70%
4	ACTOVEGIN	0,9%	9%	12%
5	CLEXANE	0,8%	31%	28%
6	SODIUM CHLORIDE	0,8%	32%	30%
7	CARDIOMAGNYL	0,6%	28%	31%
8	ERGOFERON	0,6%	616%	617%
9	TRIPLIXAM	0,6%	28%	28%
10	SPASMALGON	0,5%	-34%	-34%
11	CONCOR	0,5%	47%	45%
12	ASCORBIC ACID	0,5%	118%	132%
13	AUGMENTIN	0,5%	9%	5%
14	NUROFEN FOR CHILD	0,4%	-15%	-14%
15	DEXAMETHASONE	0,4%	56%	33%

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