IQVIA

KIHE 2024

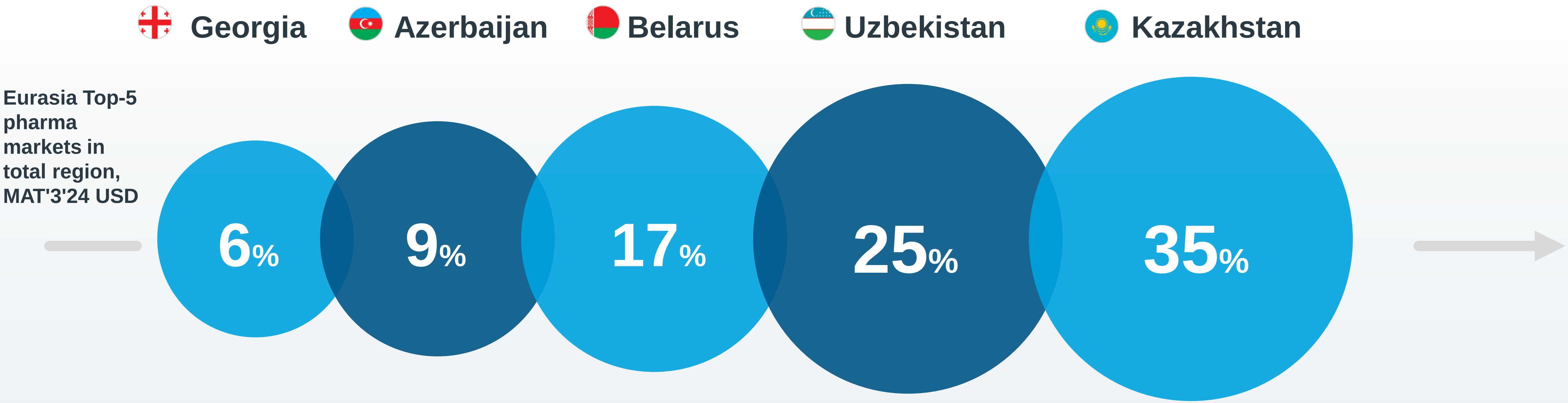
Фармацевтический рынок Казахстана 2024. Проблемы и перспективы

MAY 15, 2024

Overall Eurasia region pharma market is expected to grow with 12-14% CAGR in MAT'3'24-25

CIS+ countries pharma market aspirations[1]

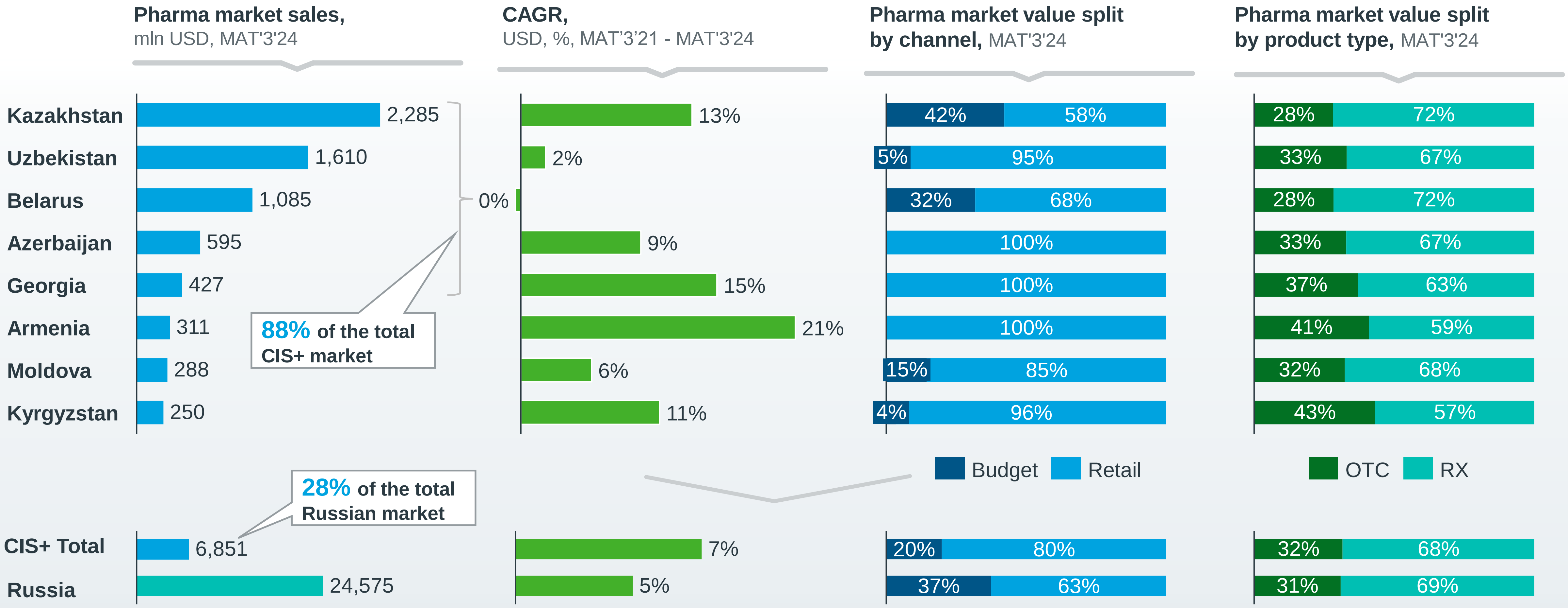
Top-5 pharma markets takes ~91% of total Eurasia value



(1) Excluding Russia

Eurasia pharma markets demonstrate the domination of retail segment; Rx products account for ~60-70% of sales

CIS+ pharma market landscape



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Kazakhstan pharma market MAT’03 24

May 2024

Zhibek Kerimbaeva
Country Head Kazakhstan/Eurasia

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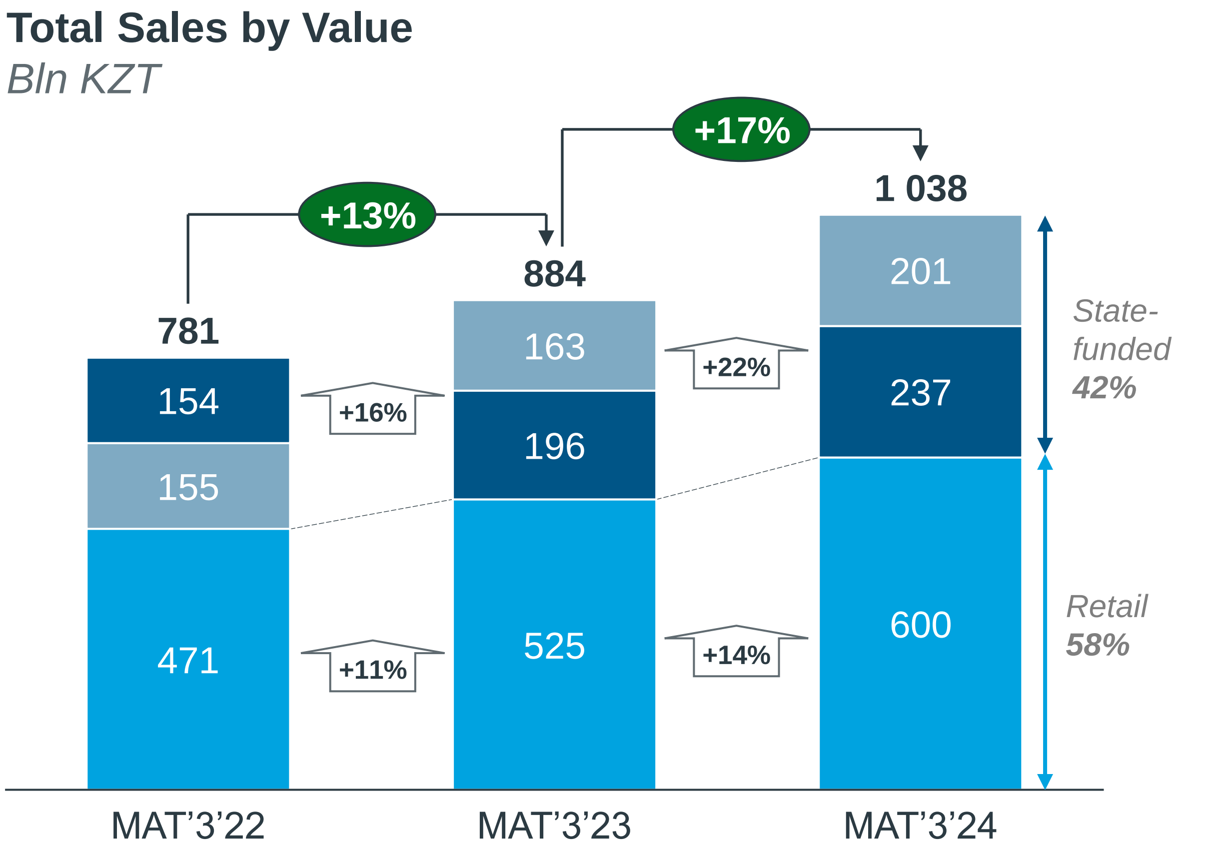
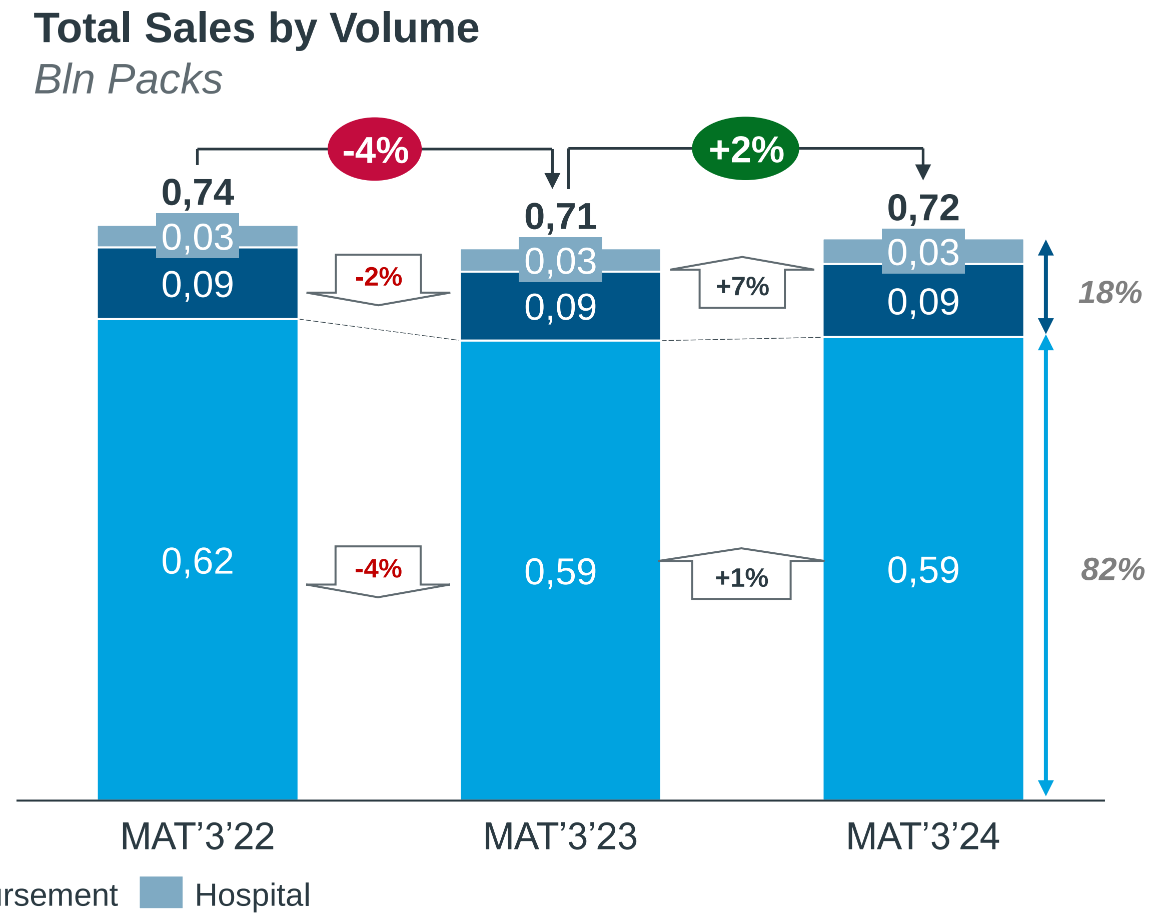
Kazakhstan pharma market continues to grow in value terms in MAT Mar'24 both in retail and state-funded channels

Kazakhstan total pharma market by channels





Indicator	KZT	USD	EURO	Packs	SU
Value MAT'03'24, Bln	1 038,4	2,3	2,1	0,7	21,7
Growth 24/23, %	17%	19%	14%	2%	5%

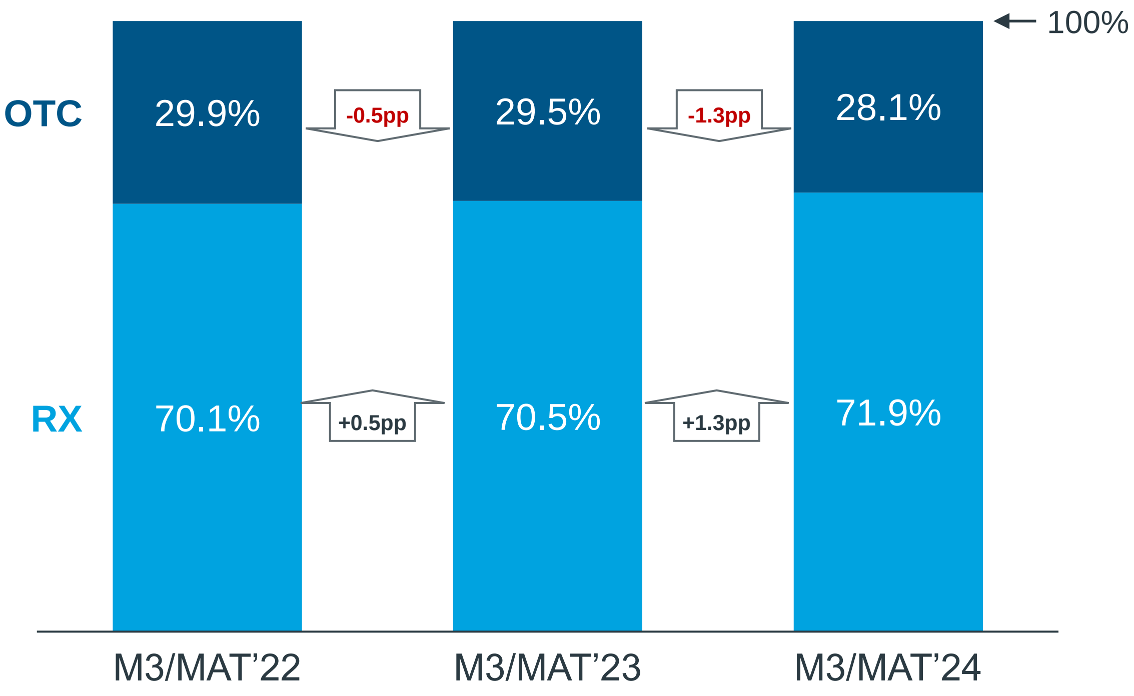
Source: IQVIA database (Retail, Hospital, Reimbursement); Trade price

The market is dominated by Rx medicines; share of non-generic drugs (Original and first-in-INN) has slowly grown in the past years

Total pharma market by structure

Prescription status

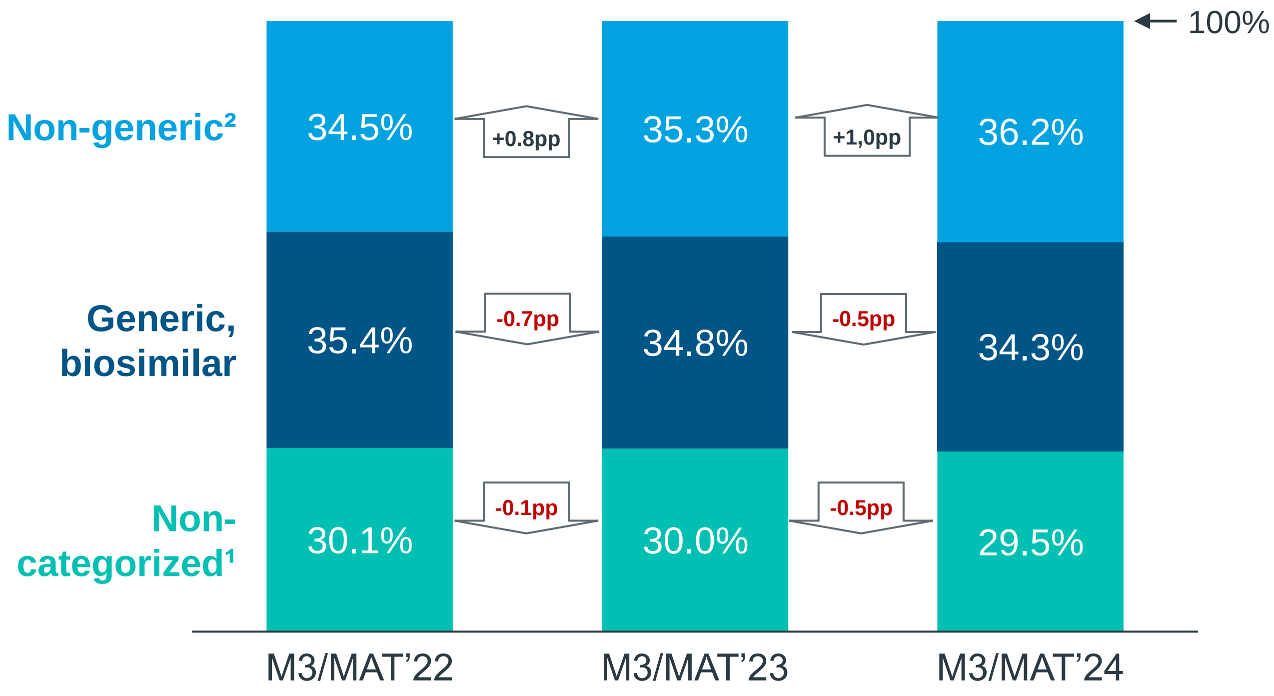
Bln ₸



	Rx / OTC, %		
Retail	52 / 48	52 / 48	53 / 47
State	98 / 2	98 / 2	98 / 2

Non-generic vs generic biosimilar drugs

Bln ₸



	Non-generic[2] / Generic, biosimilar / Non-categorized[1], %		
Retail	25 / 38 / 37	24 / 38 / 38	23 / 39 / 38
State	49 / 32 / 19	53 / 29 / 18	54 / 28 / 18

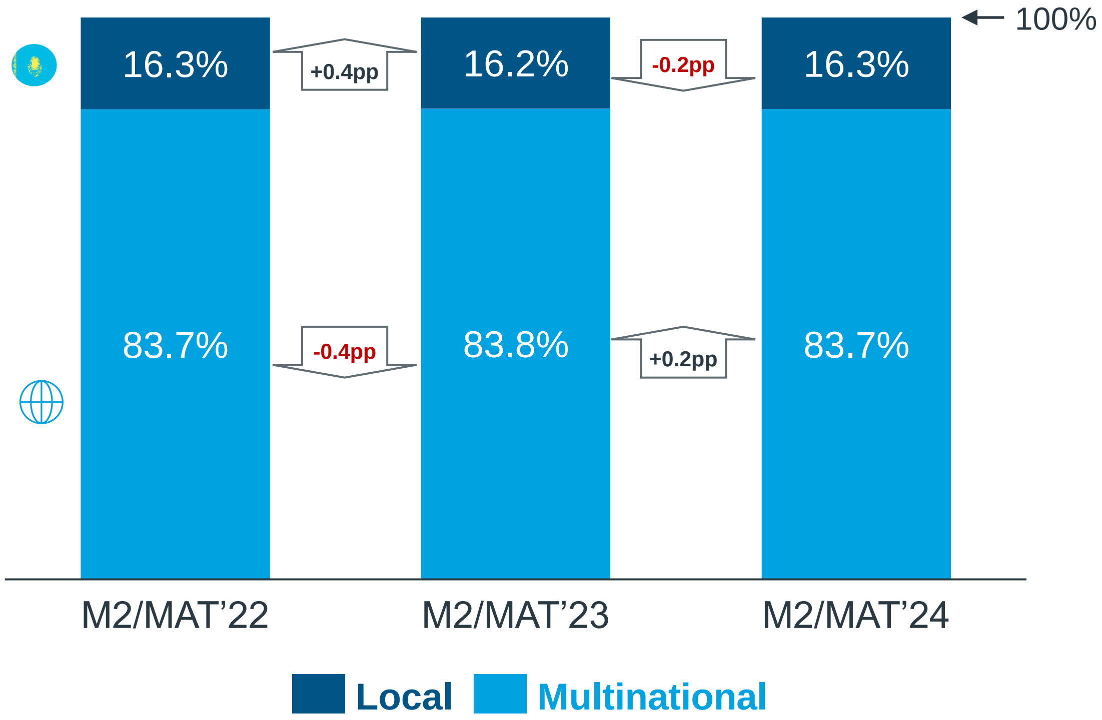
Source: IQVIA database (Retail and Budget audits in Kazakhstan); Trade price;

The market share of local companies still the same during 3 last years in value and about 40 % in volume terms which is still far from the objectives set up by President

Total pharma market by corporation nationality

Total Sales value

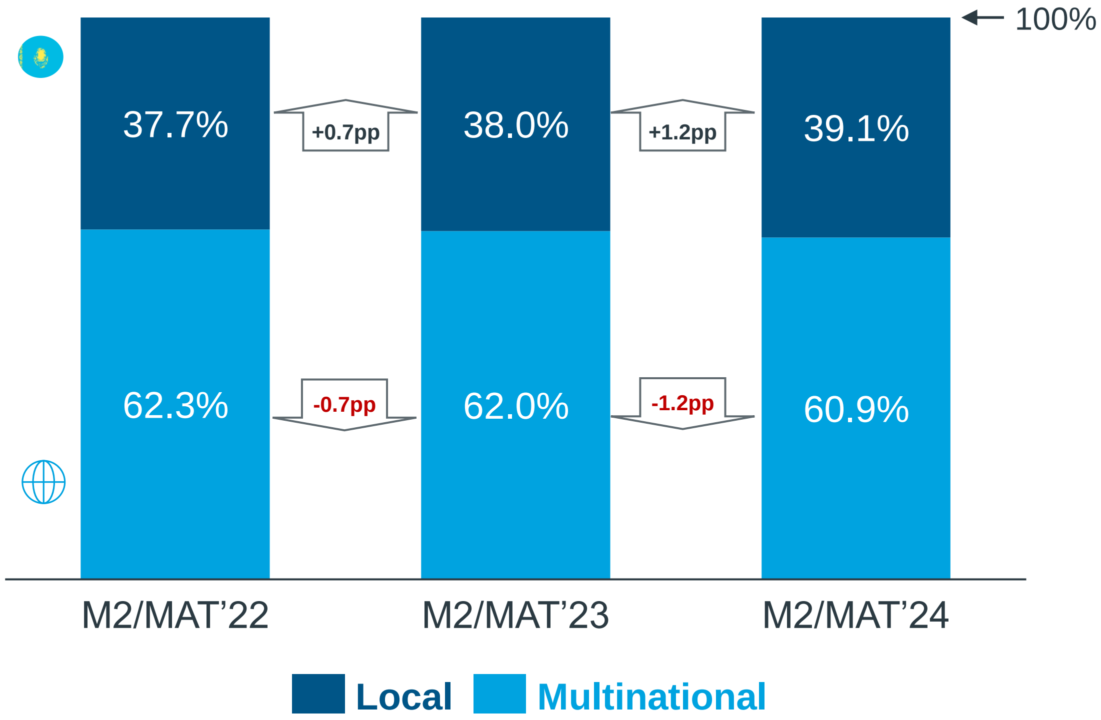
₸



	Multinational / Local, %		
Retail	88 / 12	88 / 12	87 / 13
State	77 / 23	78 / 22	79 / 21

Total Sales volume

Packs



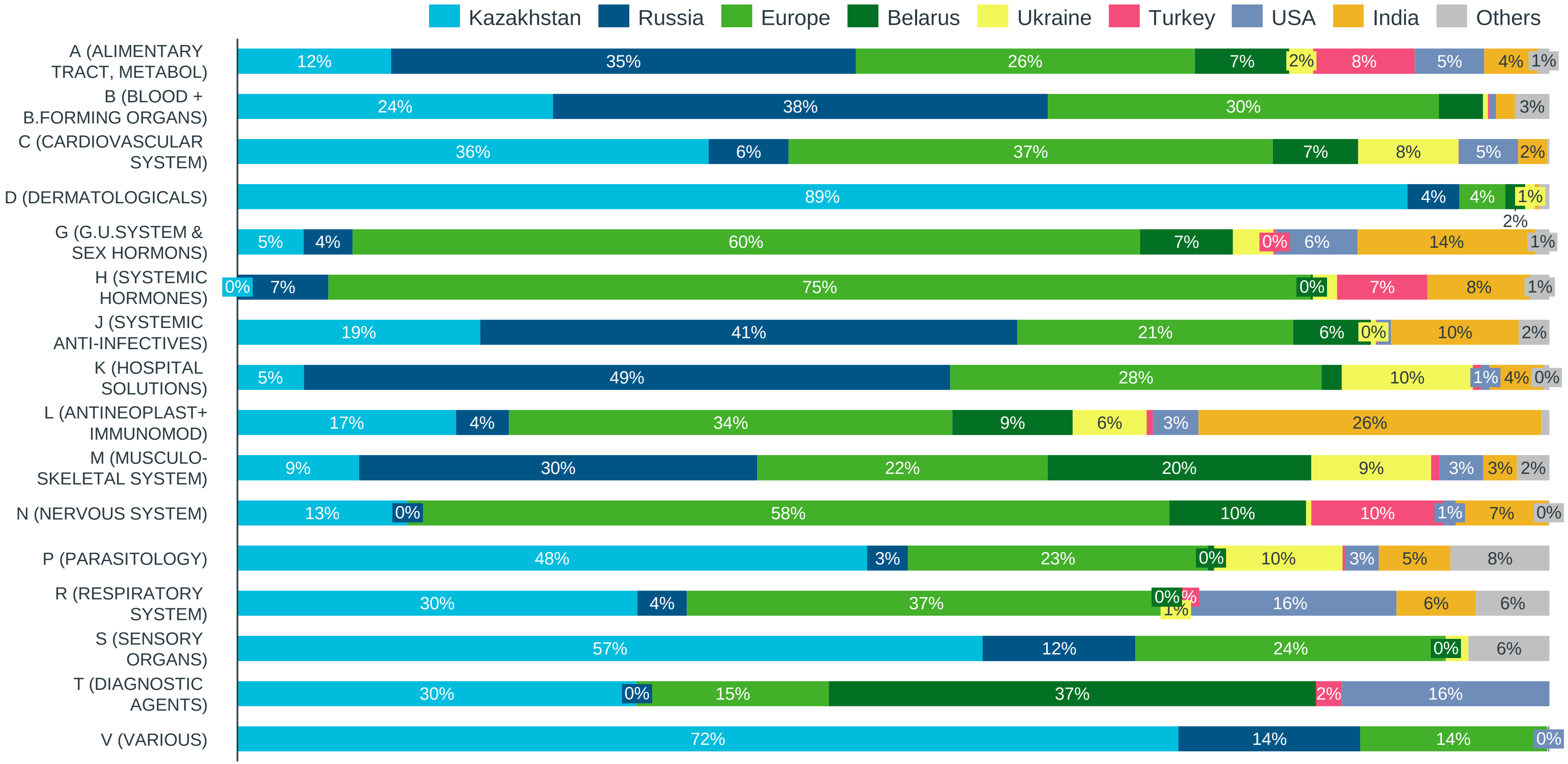
	Multinational / Local, %		
Retail	68 / 32	67 / 33	67 / 33
State	33 / 67	34 / 66	32 / 68

Source: IQVIA database (Retail and Budget audits in Kazakhstan); Trade price;

In 7 out of 16 ATC classes more than 30% of the drugs are produced in Kazakhstan

Drug consumption in Kazakhstan by the drug manufacturing origin

Drug consumption in Kazakhstan by ATC 1 class and by the drug manufacturing origin *SU, 2021*



Comments

- There are large foreign manufacturers which have production in Kazakhstan: Santo (member of Polpharma group), Nobel (Turkey) and Abdi Ibrahim Global Pharm (Turkey)
- In 5 out of 16 ATC classes more than 30% of the drugs produced in Russia
- In 8 out of 16 ATC classes more than 30% of the drugs produced in Europe
- ATC1 H (Systemic Hormones) is the only category that does not have drugs produced in Kazakhstan

Updated monthly

Only 5 out of TOP10 companies have positive value dynamics vs previous period. There are 2 local companies in TOP3!

Top10 overall ranking of companies by sales

	Company	Market share *MAT'03'24, % in KZT*	Value change *MAT'03'24 - MAT'03'23*	Volume change *MAT'03'24 - MAT'03'23*	Top1 brand (value) *Share in company portfolio*	
	Total	**100%**	**17%**	**2%**		
1	SANTO	4,73%	7%	0%	Ibufen	8%
2	NOBEL-AFF	4,21%	21%	13%	Coronim	13%
3	JOHNSON & JOHNSON	4,17%	-3%	-72%	Simponi	20%
4	SANOFI	4,10%	1%	-2%	Hexaxim	20%
5	ROCHE	3,04%	52%	12%	Evrysdi	15%
6	TAKEDA	2,88%	23%	-2%	Immunate	18%
7	WORLD MEDICINE	2,52%	18%	14%	Cefamed	10%
8	NOVARTIS	2,49%	23%	-11%	Jakavi	26%
9	ABBOTT	2,32%	11%	9%	Heptral	25%
10	ASTRAZENECA	2,22%	65%	30%	Tagrisso	28%

Top-10: 32,67%

Total pharmaceutical market overview

Source: IQVIA database (Retail, Hospital, Reimbursement); Trade price

9 out of Top10 brands generate their sales in the state-funded segment; All of Top10 brands are international

Top10 overall ranking of brands by sales

#	Brand	Market share (MAT'03'24, % in KZT)	Value change (MAT'03'24 - MAT'03'23)	Volume change (MAT'03'24 - MAT'03'23)	State vs Retail, Share of sales: Retail	Budget
	Total	100%	17%	2%		
1	KEYTRUDA	1,16%	65%	74%	0%	100%
2	PREVENAR	0,87%	1%	-2%	0%	100%
3	HEXAXIM	0,83%	-12%	-12%	0%	100%
4	SIMPONI	0,81%	35%	35%	0%	100%
5	JARDIANCE	0,78%	70%	71%	18%	82%
6	SPINRAZA	0,77%	-30%	-29%	0%	100%
7	VACC MEAS.MUMP.RUB	0,73%	686%	352%	0%	100%
8	JAKAVI	0,66%	57%	60%	0%	100%
9	VICTOZA	0,64%	40%	37%	0%	100%
10	TAGRISSO	0,62%	81%	81%	0%	100%

Top-10: 7,88%

Retail Budget

Total pharmaceutical market overview

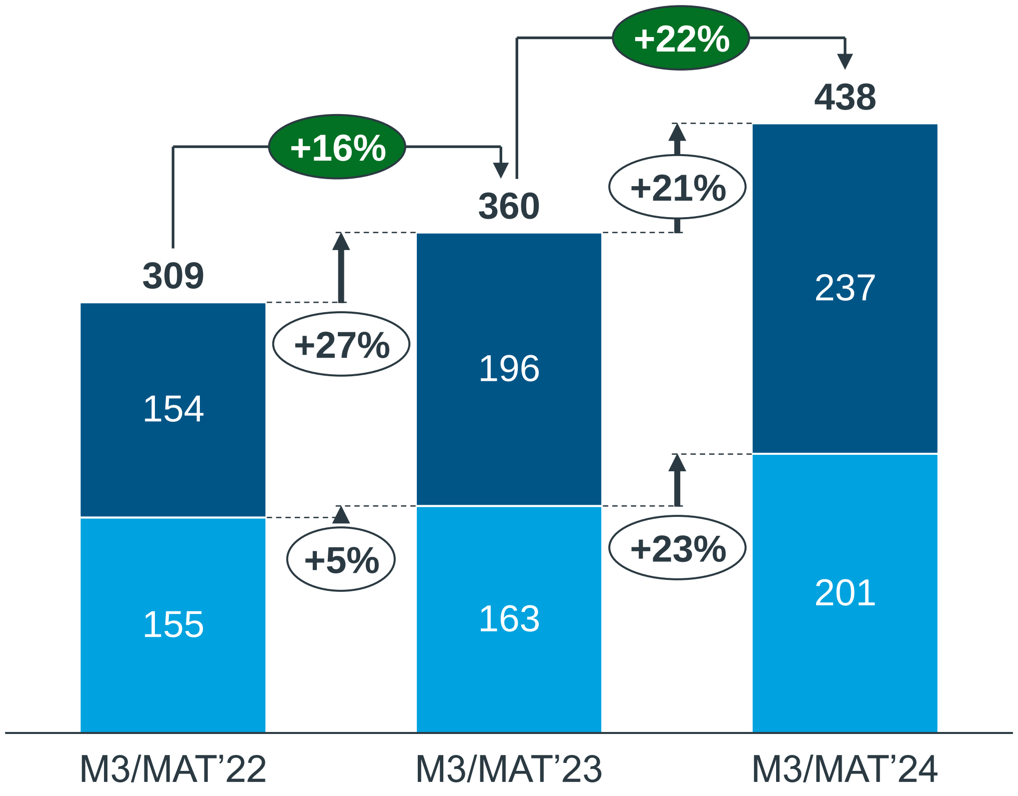
Source: IQVIA database (Retail, Hospital, Reimbursement); Trade price

Kazakhstan:
State -funded segment

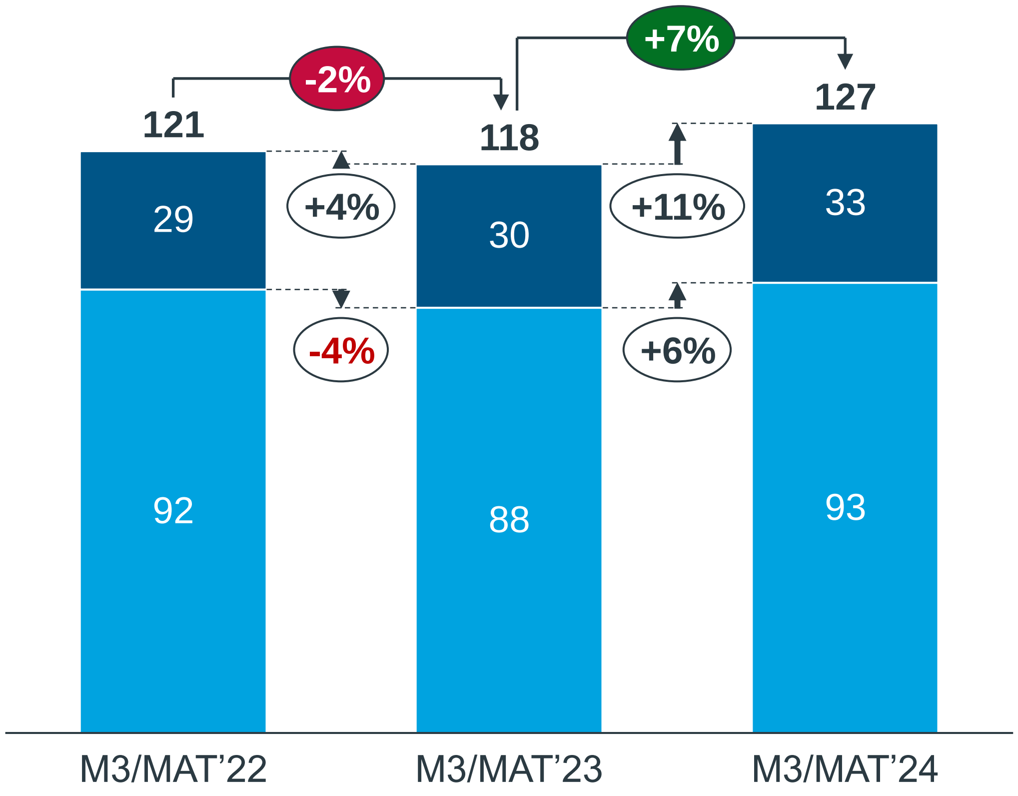
Hospital sales occupy 45% of total Budget sales in Kazakhstan; the reimbursement segment is 55%

Total State funded segment

Total State funded Sales by Value
Bln ₸



Total State funded Sales by Volume
Mln Packs



Free & Co-payment Hospital

State funded segment

Source: IQVIA database (Budget audit in Kazakhstan); Trade price;

B02 category shows the highest CAGR

State funded segment EphMRA2 top-10 performance

	EphMRA2	Market Share MAT'3'24 Bln ₸, %	CAGR, MAT'3'24-MAT'3'22 %	YoY, MAT'3'24 - MAT'3'23 %	Top-1 Brand	MS% within relative EphMRA2
1	L01 - Antineoplastics	114 (26%)	35%	43%	Keytruda	11%
2	A10 - Drugs Used In Diabetes	41 (9%)	24%	23%	Victoza	16%
3	J07 - Vaccines	40 (9%)	7%	17%	Prevenar	23%
4	B02 - Blood Coagulation System Products	27 (6%)	40%	34%	Revolade	23%
5	L04 - Immunosuppressive Agents	24 (6%)	35%	28%	Simponi	35%
6	N07 - Other Cns Drugs	20 (5%)	26%	12%	Spinraza	41%
7	A16 - Other Alimentary Tract And Metabolism Products	13 (3%)	22%	8%	Elaprase	37%
8	J01 - Systemic Antibacterial	11 (2%)	3%	13%	Cef	15%
9	B01 - Antithrombotic Agents	10 (2%)	-14%	-10%	Pradaxa	26%
10	J05 - Antivirals For Systemic Use	10 (2%)	-10%	3%	Rezolsta	20%
	Total Top-10	**309 (71%)**	**22%**	**25%**		

State funded segment

Source: IQVIA database (Budget audit in Kazakhstan); Trade price; Excluding Diagnostic agents EphMRA2 – T02,T03

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TOP 10 ATC 2 accumulated more than 70% of the market value

State funded segment EphMRA2 top-10 performance

#	EphMRA2	Market Share MAT'3'24 (Bln ₸, %)	Sales value split by corporation nationality MAT'3'24 (₸, %): Multinational	Local	Sales volume split by corporation nationality MAT'3'24 (Packs, %): Multinational	Local
1	L01 - Antineoplastics	114 (26%)	72%	28%	39%	61%
2	A10 - Drugs Used In Diabetes	41 (9%)	91%	9%	46%	54%
3	J07 - Vaccines	40 (9%)	100%	0%	100%	0%
4	B02 - Blood Coagulation System Products	27 (6%)	84%	16%	29%	71%
5	L04 - Immunosuppressive Agents	24 (6%)	89%	11%	99%	1%
6	N07 - Other Cns Drugs	20 (5%)	96%	4%	59%	41%
7	A16 - Other Alimentary Tract And Metabolism Products	13 (3%)	90%	10%	97%	3%
8	J01 - Systemic Antibacterial	11 (2%)	27%	73%	11%	89%
9	B01 - Antithrombotic Agents	10 (2%)	46%	54%	15%	85%
10	J05 - Antivirals For Systemic Use	10 (2%)	79%	21%	39%	61%
	Total Top-10	**309 (71%)**	80%	20%	30%	70%

Multinational / Local

State funded segment

Source: IQVIA database (Budget audit in Kazakhstan); Trade price;

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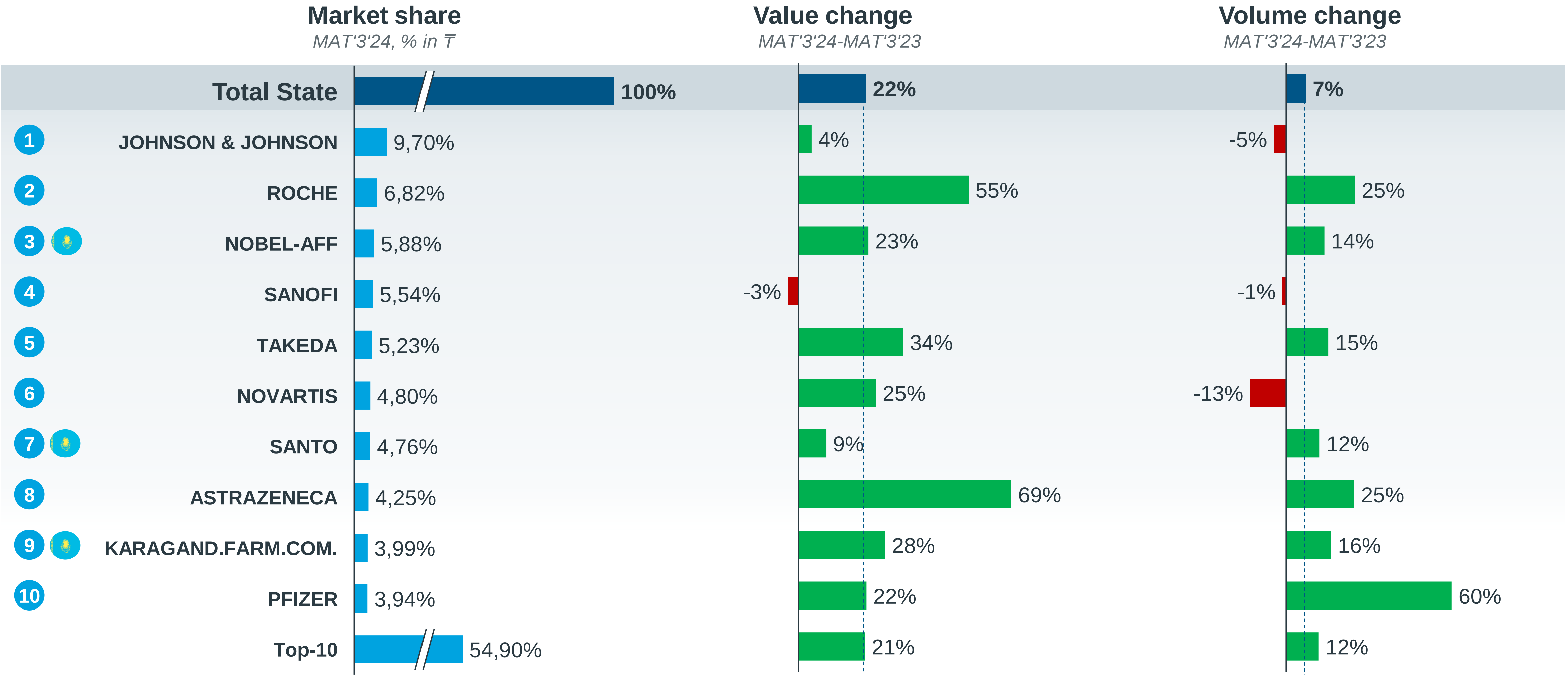
Astra Zeneca shows a significant value growth in MAT'03'24

Top-10 state funded segment ranking of companies by sales



Source: IQVIA database (Budget audit in Kazakhstan); Trade price;

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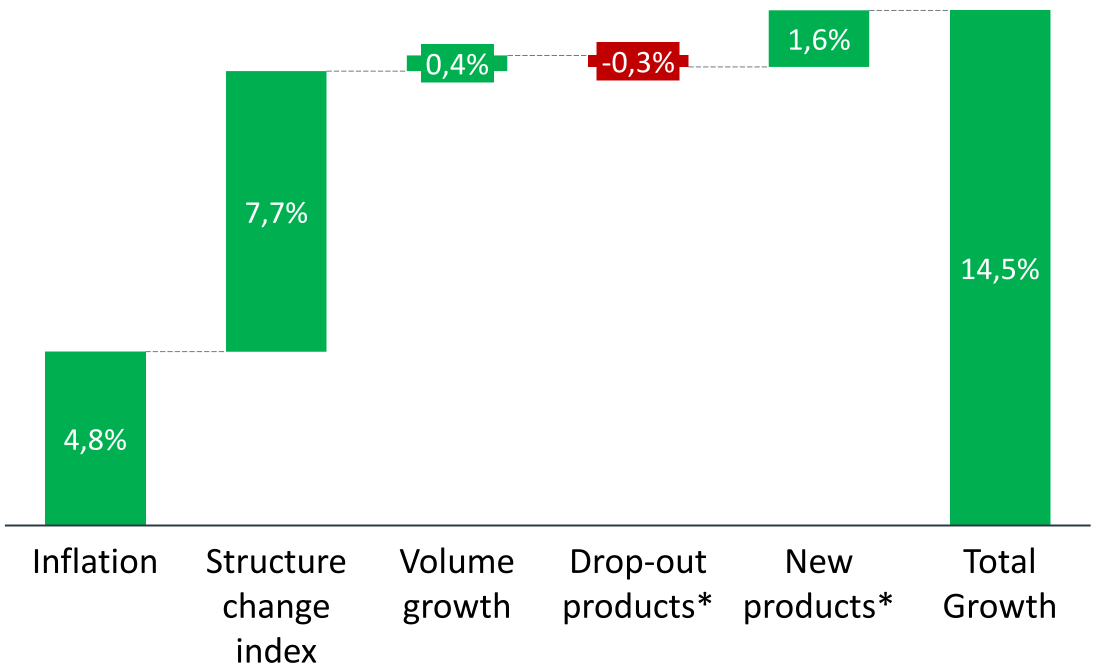
Growth Factors in KZ Pharma Market by Channel, MAT'3'24 vs MAT'3'23

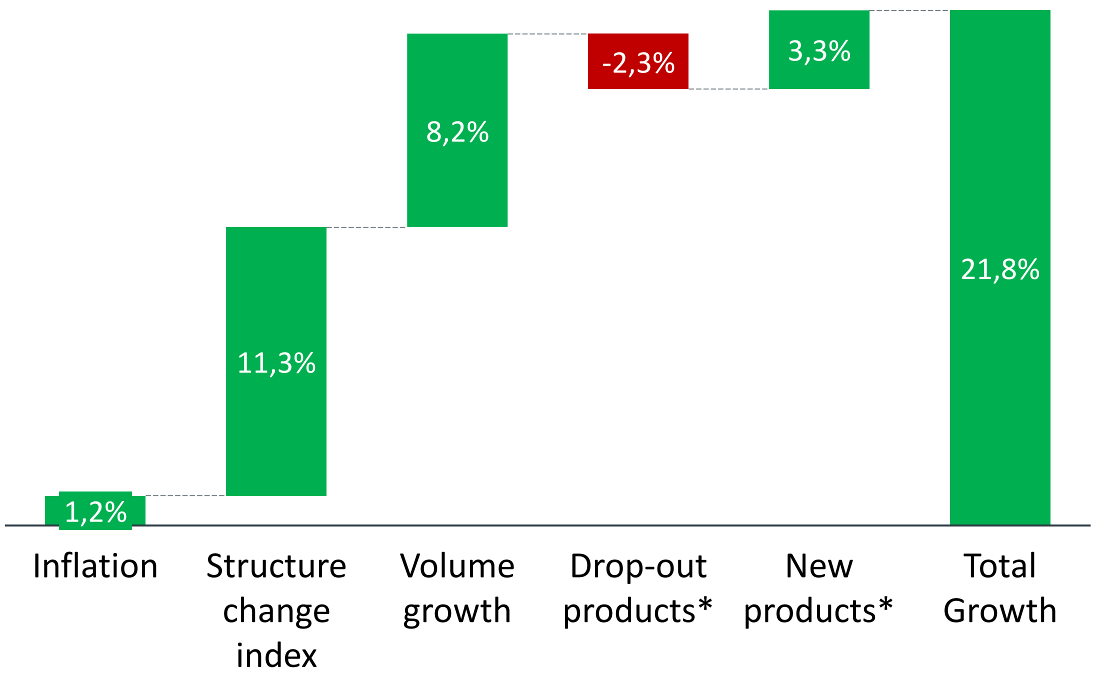
Growth in KZ (Retail pharma market)

Local currency (trade prices), %



Growth in KZ (Budget pharma market)

Local currency (trade prices), %

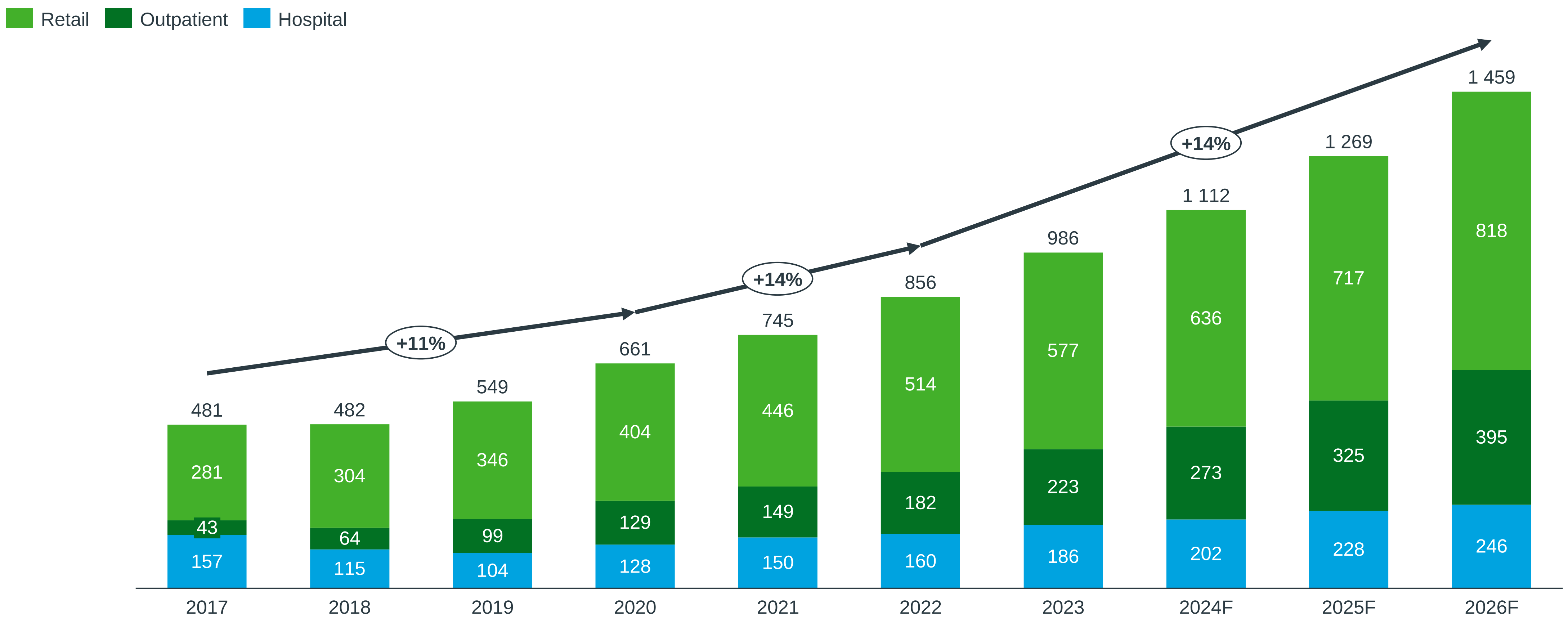


Source: IQVIA database (Retail and Budget audits in Kazakhstan); Trade price;

State channel is the main driver of the growth of the pharmaceutical market of Kazakhstan, in 2022-2026 it is projected to grow by 14,3% in value

Kazakhstan pharmaceutical market: structure and trends overview

KZ Pharmaceutical market structure, Bln KZT



Sources: IQVIA data, IQVIA analysis

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Thank you!

Zhibek Kerimbaeva
Country Head IQVIA in Kazakhstan/Eurasia
+7 701 710 0691
Zhibek.Kerimbaeva@iqvia.com