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# Rating of Russian pharmacy chains 1-4Q 2018

# TOP-10 pharmacy chains and pharmacy associations by sales of drugs (excluding reimbursement drugs supply), 1-4Q 2018

#	Category	Regions	Pharmacy Chain / Pharmacy Association	Number of stores (1 January 2019)	Market share of pharmacy chain on the retail market, drugs only, 1-4Q 2018, %	Change in drug sales 1-4Q 2018/1-4Q 2017, %	The indicator of the relative sales of drugs, 1-4Q 2018 (relative to the leading audited company)	Average check, rub.	The rank of gross sales, 1-4Q 2018
1	Fed.	82	ASNA	8 585	13,93%	-2,4%	2,361	315	-
2	Fed.	52	Rigla <sup>1</sup>	2 417	5,90%	24,5%	1,000	516	1
3	Fed.	44	Erkafarm <sup>2</sup>	1 266	5,67%	48,1%	0,962	-	2
4	Intr.	2	Pharmacy chain 36,6 <sup>3</sup>	1 319	4,74%	-7,5%	0,803	741	3
5	Fed.	23	Iris <sup>4</sup>	1 563	4,26%	13,0%	0,721	-	4
6	Fed.	10	Neo-farm	606	3,21%	30,2%	0,543	651	5
7	Fed.	27	April	1 335	2,83%	39,1%	0,480	451	6
8	Fed.	7	Farmland	1 114	2,18%	24,8%	0,370	493	7
9	Fed.	41	Planeta zdorov'ya*	1 550	2,15%	19,0%	0,364	-	8
10	Fed.	55	Melodiya zdorov'ya <sup>5</sup>	830	1,24%	59,4%	0,209	375	9
<b>Total</b>				<b>20 585</b>	<b>46,10%</b>	<b>13,7%</b>			

Fed. - federal; Intr. - interregional; Reg. - regional

\*Expert assessment

1Including OZ, Zhivika and DOMfarma

2Including Including Doktor Stoletov, Ozerki, Raduga, Pervaya pomoshch', Ladushka, Khoroshaya apteka, Vashe zdorov'ye, Farmvolga, Narodnaya apteka, Novaya apteka, MosApteka, Ozerki u doma

3Including AVE Group; Gorzdrav; A5 Group

4Including Fakmakopeyka, Farmakopeyka 24, Khelmi, Tvoy doktor, Zdes' apteka, Farmani, Aptechestvo, Stavropol'skiye gorodskiye apteki; excluding Novuyu apteka and Minitsen

5Including own pharmacies, excluding franchising

Source: based on data from pharmacy chains and pharmacy associations participating in the rating

# TOP-10 pharmacy chains by gross sales (excluding reimbursement drugs supply), 1-4Q 2018

#	Pharmacy Chain	The indicator of the relative gross sales of drugs, 1-4Q 2018	Change in gross sales 1-4Q 2018/ 1-4Q 2017, %
1	Rigla <sup>1</sup>	1,000	24,0%
2	Erkafarm <sup>2</sup>	0,935	48,1%
3	Pharmacy chain 36,6 <sup>3</sup>	0,728	-12,1%
4	Iris <sup>4</sup>	0,586	14,2%
5	Neo-Farm	0,502	36,6%
6	April	0,447	42,9%
7	Farmland	0,360	24,9%
8	Planeta zdorov'ya*	0,348	18,9%
9	Melodiya zdorovya <sup>5</sup>	0,202	42,0%
10	Pharmaimpex* <sup>6</sup>	0,184	-4,9%

\*Expert assessment

1Including OZ, Zhivika and DOMfarma

2Including Including Doktor Stoletov, Ozerki, Raduga, Pervaya pomoshch', Ladushka, Khoroshaya apteka, Vashe zdorov'ye, Farmvolga, Narodnaya apteka, Novaya apteka, MosApteka, Ozerki u doma

3Including AVE Group; Gorzdrav; A5 Group

4Including Fakmakopeyka, Farmakopeyka 24, Khelmi, Tvoy doktor, Zdes' apteka, Farmani, Aptechestvo, Stavropol'skiye gorodskiye apteki; excluding Novuyu apteka and Minitsen

5Including own pharmacies, excluding franchising

6Including Farmakon and Klyukvu

Source: based on data from pharmacy chains and pharmacy associations participating in the rating

# TOP-5 pharmacy associations and service platforms by sales of drugs (excluding reimbursement drugs supply), 1-4Q 2018

#	Pharmacy Association / Service Platform	Head Office	Number of stores (1 January 2019)	Market share of pharmacy association on the retail market, drugs only, 1-4Q 2018, %	Change of drug sales 1-4Q 2018/1-4Q 2017, %	The indicator of the relative sales of drugs, 1-4Q 2018
1	ASNA	Moscow	8 585	13,93%	-2,4%	1,000
2	ProApteka	Moscow	5 740	6,24%	48,2%	0,448
3	MFU <sup>7</sup>	S.Petersburg	2 550	3,92%	26,4%	0,281
4	Sozvezdiye	Moscow	1 577	1,51%	-	0,108
5	VESNA <sup>8</sup>	S.Petersburg	1 242	1,30%	30,0%	0,093

<sup>7</sup>MedPharm Unity

<sup>8</sup>All-Russian United Commonwealth of Independent Drugstores

Source: based on data from pharmacy associations and service platform participating in the rating