

# Rating of Russian pharmacy chains 1Q 2020

# TOP-10 pharmacy chains and pharmacy associations by sales of drugs (excluding reimbursement drugs supply) 1Q 2020

#	Category*	Regions	Pharmacy Chain / Pharmacy Association	Number of stores (1 April 2020)	Market share of pharmacy chain on the retail market, drugs only, 1Q 2020, %	Change in drug sales 1Q 2020 vs. 1Q 2019, %	The indicator of the relative sales of drugs, 1Q 2020 (relative to the leading audited company)	Average check, rub.	The rank of gross sales 1Q 2020 (relative to the leading audited company)
1	Fed.	83	ASNA	10 733	12,26%	15,4%	2,039	324	-
2	Fed.	54	Rigla <sup>1</sup>	2 905	6,0%	27,3%	1,000	560	1
3	Fed.	36	Erkafarm <sup>2</sup>	1 131	4,0%	6,5%	0,657	-	2
5	Intr.	10	Neo-farm	737	3,81%	39,0%	0,633	727	4
4	Fed.	8	Pharmacy chains 36,6 <sup>**4</sup>	1 397	3,63%	11,1%	0,604	816	3
6	Fed.	36	Vita (Samara)	1 787	3,14%	16,4%	0,522	487	5
7	Fed.	46	Planeta zdorov'ya <sup>**</sup>	1 736	3,09%	9,9%	0,513	-	6
8	Fed.	47	April	1 411	3,01%	8,6%	0,501	524	8
9	Fed.	27	Iris <sup>3</sup>	1 675	3,0%	1,9%	0,497	-	7
10	Fed.	8	Farmland	1 282	2,17%	21,3%	0,360	513	9
<b>Total:</b>				<b>24 794</b>	<b>44,1%</b>	<b>15,7%</b>			

\*Fed. = federal, Intr. = interregional, Reg. = regional

\*\*Expert assessment

1 Including OZ, Zhivika and DOMfarma

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

3 Including Fakmakopeyka, Farmakopeyka 24, Khelmi, Tvoy doktor, Zdes' apteka, Farmani, Aptechestvo, Stavropol'skiye gorodskiy apteki, Novuyu apteka and Minitsen

4 Including AVE Group; Gorzdrav; A5 Group and Kalina-Pham

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

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# TOP-10 pharmacy chains by gross sales (excluding reimbursement drugs supply) 1Q 2020

#	Pharmacy Chain	The indicator of the relative gross sales of drugs, 1Q 2020	Change in gross sales 1Q 2020 vs. 1Q 2019, %
1	Rigla <sup>1</sup>	1,000	26,6%
2	Erkafarm <sup>2</sup>	0,654	6,5%
3	Pharmacy chain 36,6 <sup>*4</sup>	0,633	24,8%
4	Neo-farm	0,587	37,4%
5	Vita (Samara)	0,495	14,5%
6	Planeta zdorov'ya*	0,490	9,6%
7	Iris <sup>3</sup>	0,489	13,7%
8	April	0,484	7,4%
9	Farmland	0,356	22,3%
10	Melodiya zdorov'ya <sup>5</sup>	0,270	41,9%

\*Expert assessment

1 Including OZ, Zhivika and DOMfarma

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

3 Including Fakmakopeyka, Farmakopeyka 24, Khelmi, Tvoj doktor, Zdes' apteka, Farmani, Aptechestvo, Stavropol'skiye gorodskiyе apteki, Novuyu apteka and Minitsen

4 Including AVE Group; Gorzdrav; A5 Group and Kalina-Pharm

5 Including own pharmacies, excluding franchising and partners

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

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# TOP-6 pharmacy associations and service platforms by sales of drugs (excluding reimbursement drugs supply) 1Q 2020

#	Pharmacy Association / Service Platform	Head Office	Number of stores (1 April 2020)	Market share of pharmacy association on the retail market, drugs only, 1Q 2020, %	Change of drug sales 1Q 2020 vs. 1Q 2019, %	The indicator of the relative sales of drugs, 1Q 2020
1	ASNA	Moscow	10 733	12,26%	15,4%	1,000
2	ProApteka	Moscow	5 810	7,28%	28,1%	0,505
3	MFU <sup>1</sup>	St. Petersburg	4 411	6,37%	101,0%	0,508
4	Sozvezdiye	Moscow	3 613	2,79%	112,3%	0,218
5	VESNA <sup>2</sup>	St. Petersburg	1 456	1,48%	30,7%	0,124
6	Zdravcity	Moscow	14 549	0,22%	118,7%	0,021

1 MedPharm Unity  
2 All-Russian United Commonwealth of Independent Drugstores

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