Rating of Russian pharmacy

Chains 1-4Q 2020

TOP-10 pharmacy chains and pharmacy associations by sales of drugs (excluding reimbursement drugs supply) 1-4Q 2020

#	Category*	Regions	Pharmacy Chain / Pharmacy Association	Number of stores (1 January 2021)	Market share of pharmacy chain on the retail market, drugs only, 1-4Q 2020, %	Change in drug sales 1-4Q 2020 vs. 1-4Q 2019, %	The indicator of the relative sales of drugs, 1-4Q 2020 (relative to the leading audited company)	Average check, rub.	The rank of gross sales 1-4Q 2020 (relative to the leading audited company)
1	Fed.	81	ASNA	11 900	12,84%	9,8%	-	346	-
2	Fed.	56	Rigla[1]	3 136	6,07%	16,0%	1,000	579	1
3	Fed.	36	Erkafarm[2]	1 079	4,85%	4,0%	0,799	-	2
4	Fed.	12	Neo-farm	800	3,64%	15,4%	0,600	753	4
5	Fed.	52	April	1 892	3,52%	33,5%	0,580	548	3
6	Fed.	46	Planeta zdorov’ya**	1 859	3,49%	42,6%	0,575	-	5
7	Int.	8	Pharmacy chains 36,6**[4]	1 469	3,47%	-6,3%	0,571	-	7
8	Fed.	27	Iris[3]	1 792	3,36%	9,8%	0,554	-	6
9	Fed.	37	Vita (Samara)	1 817	3,20%	10,8%	0,527	-	8
10	Fed.	8	Farmland	1 320	2,32%	15,9%	0,382	536	9
Total:				**27 064**	**46,8%**	**15,1%**			

*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 gorodskiye apteki, Novuyu apteka and Minitsen
4 Including AVE Group; Gorzdrav; A5 Group and Kalina-Pharm
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 2020

#	Pharmacy Chain	The indicator of the relative gross sales of drugs, 1-4Q 2020	Change in gross sales 1-4Q 2020 vs. 1-4Q 2019, %
1	Rigla[1]	1,000	16,6%
2	Erkafarm[2]	0,716	4,0%
3	April	0,552	33,1%
4	Neo-farm	0,546	16,5%
5	Planeta zdorov'ya*	0,541	39,7%
6	Iris[3]	0,533	13,0%
7	Pharmacy chain 36,6*[4]	0,511	-7,2%
8	Vita (Samara)	0,496	10,9%
9	Farmland	0,376	17,6%
10	Melodiya zdorov'ya[5]	0,253	14,5%

*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 gorodskiye 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

TOP-6 pharmacy associations and service platforms by sales of drugs (excluding reimbursement drugs supply) 1-4Q 2020

#	Pharmacy Association / Service Platform	Head Office	Number of stores (1 January 2021)	Market share of pharmacy association on the retail market, drugs only, 1-4Q 2020, %	Change of drug sales 1-4Q 2020 vs. 1-4Q 2019, %	The indicator of the relative sales of drugs, 1-4Q 2020
1	ASNA	Moscow	11 900	12,84%	9,8%	1,000
2	ProApteka	Moscow	7 589	8,88%	44,6%	0,583
3	MFU[1]	St. Petersburg	5 277	6,03%	33,4%	0,455
4	Sozvezdiye	Moscow	4 410	3,89%	109,2%	0,307
5	VESNA[2]	St. Petersburg	1 520	1,39%	19,0%	0,108
6	Zdravcity	Moscow	14 651	0,36%	131,7%	0,031

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