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The rating of pharmacy chains in the Russian Federation based on the results of the first quarter of 2017.
Based on the results of the first quarter of 2017, the number of pharmacies in Russia reached 60,422, with the overall turnover including all categories of goods sold through the pharmacy segment, amounting to 281.56 billion rubles. In the pharmacy segment, we observe continuing consolidation and growth of the key players' share. Both the turnover of pharmacies and the average check are growing, which inspires optimism. The most obvious changes occur in the formal field of changing the status of pharmacies.

... sed lex: Consequences of the law 44-FZ

Since January 1, 2017, amendments to the 44-FZ have entered into force, obliging State unitary enterprises (SUE) and municipal unitary enterprises (MUE) to make procurements only under this law, prohibiting procurements under the law 223-FZ. The law 44-FZ stipulates rigid requirements to the description of procurements. The pharmacy can request the products it needs, only under their INN, but not under their trade name, and the procurement procedure can last more than a month. Fearing that these factors will lead both to the narrowing of the range in pharmacies, and to the shortage in individual products that can't be ordered forward, state and municipal pharmacies began to change their status to limited liability companies. LLC can work under the law 223-FZ, according to which procurements can be made quickly, by a description of goods including their trade name. In the first quarter of 2017, five pharmacy chains changed the status: *Pharmacy* in Komsomolsky, Frunzensky and Ordzhonikidzevsky Districts of Ivanovo, in the Ivanovo region; *Pharmacy 22* in the Kostroma Region, and *Pharmacy Plus* in the Orenburg region (Table 1). As a result of a sober assessment of the consequences of 44-FZ for state and municipal pharmacies, a bill has been submitted to the State Duma, which will allow them to procure goods under FZ-223 again, from June 2017.
Of the large M & A transactions, it is worth to note the absorption of 29 pharmacies of the *Social Pharmacy* in the Stavropol Territory by Rostov *Pharmacevt +*, in January 2017.

In the first quarter of 2017, the expansion of some pharmacy networks to new regions attracted attention: Krasnoyarsk *Gubernskie Pharmacies* expanded to the Irkutsk region, Moscow *Neo-Pharm*, to the Kostroma region and St. Petersburg, Krasnodar *Aprel*, to Oryol and Lipetsk region, Moscow *Mega Pharm*, to the Leningrad region (Table 2).

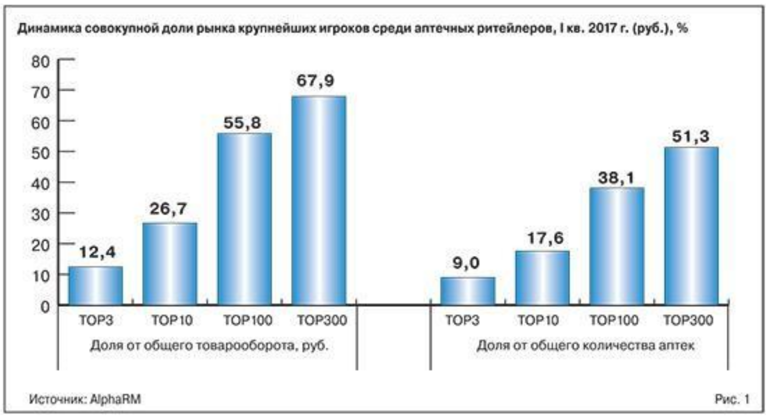
The battle of the strongest

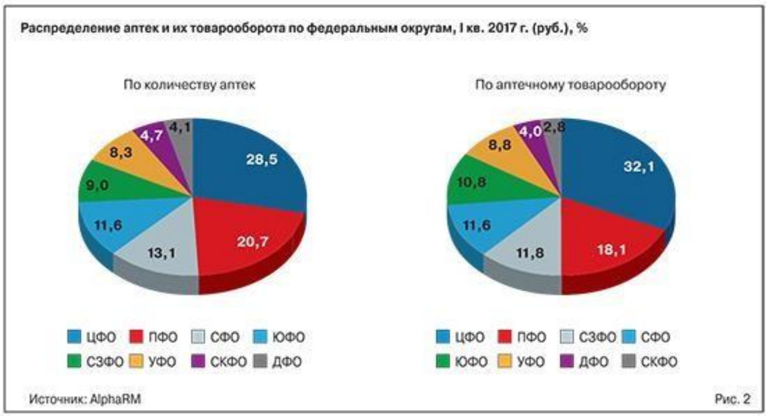
The first position in the ranking of pharmacy chains in the 1st quarter of 2017 belongs to *Rigla* (Moscow) with 1,803 pharmacies in 48 regions of Russia and a market share of 4.76%. On the second position, *Group 36.6* (Moscow), represented by 1,755 pharmacies in four regions, with a market share of 4.5%. The Samara *Implosia* has the third position, with 1,891 pharmacy outlets in 42 regions and a market share of 3.18% (Table 4).

The new networks that got into TOP100 in the first quarter of 2017 and which were not included in TOP100 in 2016 are: *Mega Pharm* (Moscow), that occupied the 117th position in 2016, soared to the 23rd position in the first quarter of 2017; *Mosapteka* (Moscow), rose from the 141st position to the 80th ; Tver *RELY* was on 101st position in 2016 and on 87th in 2017; Tomsk *Leka* rose from the 104th position to the 91st ; *Serdce Continenta* (Moscow) moved from the 108th position to the 97th (Table 3).

The TOP3 pharmacy chains have a combined share of 9% of total pharmacies and 12.4% of total turnover; the TOP10, 17.6 and 26.7%, respectively, and the TOP300 account for more than half of all pharmacy institutions with a combined turnover of almost 70% of the total retail market (Figure 1).

The maximum share both in the number of pharmacies (28.5%) and in the volume of turnover (32.1%) belongs to the Central Federal District. The minimum share in the number of pharmacies belongs to the Far Eastern Federal District (4.1%), and in terms of goods turnover, to the North Caucasus Federal District (2.8%) (Figure 2).





The average monthly turnover per pharmacy in Russia in 2016 amounted to 1.55 million rubles (with the maximum value of 2.03 million rubles in the North-West Federal District, and the minimum of 0.94 million rubles in the North Caucasus Federal District). The average purchase in the Russian Federation amounted to 389 rubles, with the maximum of 406 rubles in the North-Western Federal District, and a minimum (254 rubles) in the North Caucasus Federal District (Figure 3). Pharmacies with average regional revenues (category B*) account for 40.5% of the average sales structure in the Russian Federation, while the share of pharmacies with revenues below the average is also high, amounting to 35% of the total market. Super-profitable pharmacies (A +, 5.5%) are almost one and a half times less numerous than super-unprofitable pharmacies (C-, 7.5%), while pharmacies that are slightly better off than average make up only 11.6% (Figure 4).

Аптечные сети, сменившие форму собственности с ГУП/МУП на ООО, I кв. 2017 г.		
Инициатор	Регион	Дата перехода в ООО
ФАРМАЦИЯ (Комсомольск)	Ивановская область	Февраль 2017
Фармация Фрунзенского района (Иваново)	Ивановская область	Февраль 2017
Фармация Октябрьского района (Иваново)	Ивановская область	Февраль 2017
Аптека 22 (Нея)	Костромская область	Март 2017
Фармация плюс (Бузулук)	Оренбургская область	Март 2017

Источник: AlphaRM — Таблица 1

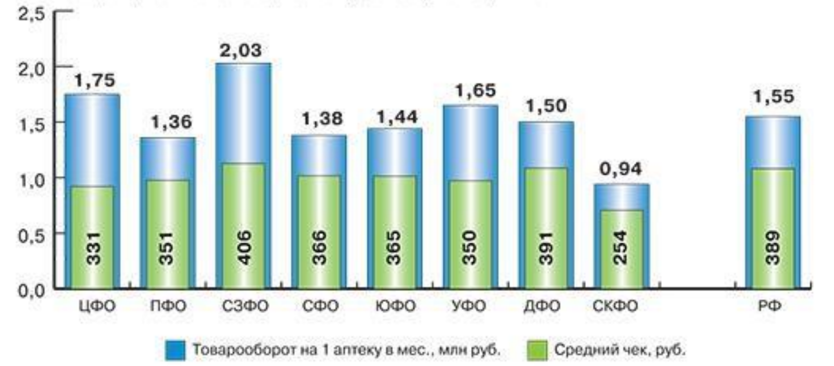
Выход в новые регионы, I кв. 2017 г.		
Инициатор экспансии	Регион	Начало экспансии
Губернские аптеки (Красноярск)	Иркутская область	Январь 2017
Мега-Фарм (Москва)	Ленинградская область	Январь 2017
Нео-Фарм (Москва)	Костромская область	Март 2017
Нео-Фарм (Москва)	Санкт-Петербург	Март 2017
Апрель (Краснодар)	Орловская область	Март 2017
Апрель (Краснодар)	Липецкая область	Март 2017

Источник: AlphaRM — Таблица 2

Новые сети в ТОР 100, I кв. 2017 г.		
Название сети	Место в рейтинге	
	I кв. 2017 г.	2016 г.
Мега Фарм (Москва)	23	117
Мосаптека (Москва)	80	141
РИЛАЙ (Тверь)	87	101
Лека (Томск)	91	104
Сердце Континента (Москва)	97	108

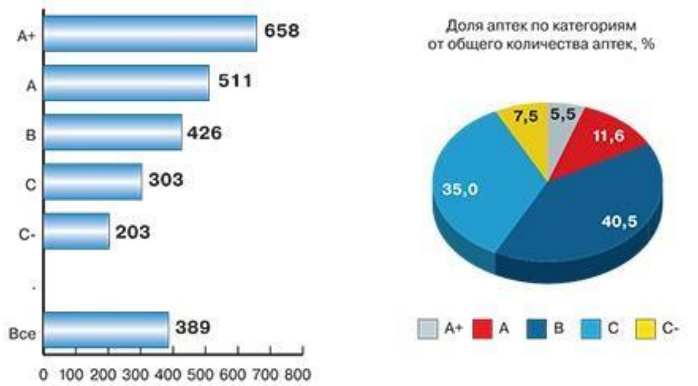
Источник: AlphaRM — Таблица 3

Ключевые характеристики аптечного ритейла в детализации по ФО, I кв. 2017 г.



Источник: AlphaRM — Рис. 3

Размер среднего чека в зависимости от товарооборота аптеки, I кв. 2017 г., руб.



Источник: AlphaRM — Рис. 4

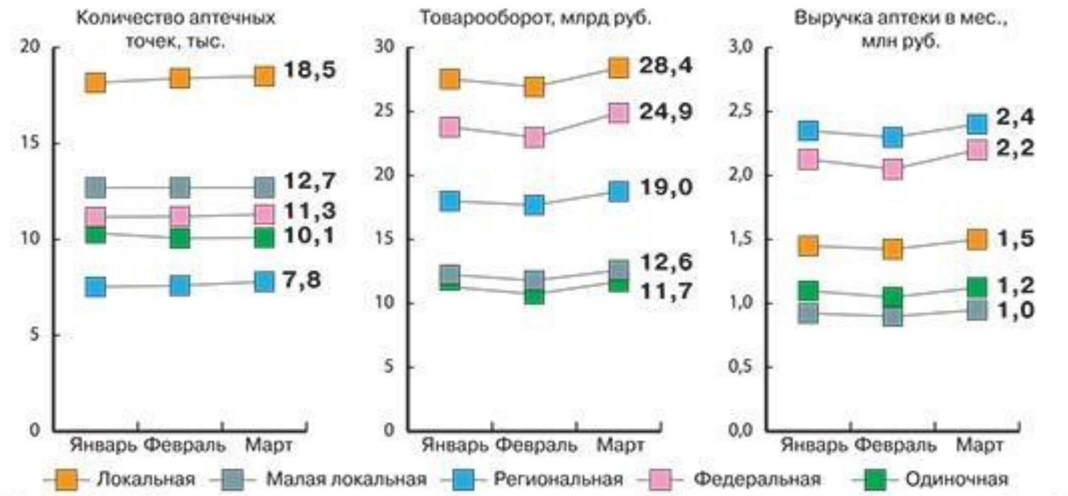
TOP50 аптечных сетей по размеру товарооборота, I кв. 2017 г.

Рейтинг	Название (центральный офис)	Вид	Кол-во регионов	Кол-во точек	Объем продаж, млн руб.	Средний чек, руб.	Доля рынка, %
1	Ригла (Москва)	Федеральная	48	1 803	13 391,9	457,3	4,76
2	Group 36,6 (Москва)	Региональная	4	1 755	12 661,6	452,8	4,50
3	Имплозия (Самара)	Федеральная	42	1 891	8 953,2	425,4	3,18
4	Планета здоровья (Пермь)	Федеральная	39	1 105	7 483,7	488,9	2,66
5	Первая Помощь&Радуга (Санкт-Петербург)	Федеральная	45	1 196	6 840,5	426,0	2,43
6	Доктор Столетов&Озерки (Москва)	Федеральная	12	354	6 664,9	704,7	2,37
7	Нео-Фарм (Москва)	Региональная	7	342	5 885,9	637,5	2,09
8	Фармакопейка&Твой доктор (Тула)	Федеральная	15	891	4 579,5	470,3	1,63
9	Фармленд (Уфа)	Региональная	7	746	4 505,9	476,4	1,60
10	Апрель (Краснодар)	Региональная	8	559	4 302,8	508,6	1,53
11	Фармаимпекс (Ижевск)	Федеральная	19	596	4 246,1	542,4	1,51
12	Вита (Самара)	Федеральная	14	732	3 519,9	438,1	1,25
13	Самсон-Фарма (Москва)	Локальная	1	66	3 459,9	1 363,1	1,23
14	36,7С&Максавит (Нижний Новгород)	Федеральная	30	302	3 189,9	455,3	1,13
15	Мелодия здоровья (Новосибирск)	Федеральная	52	670	2 949,11	407,5	1,05
16	Аптека от склада (Пермь)	Федеральная	22	578	2 933,5	478,1	1,04
17	Фармацевт+ (Ростов-на-Дону)	Региональная	6	277	2 837,4	531,3	1,01
18	Новая аптека&Аптека Миницен (Хабаровск)	Федеральная	10	134	2 297,4	600,0	0,82
19	Невис (Санкт-Петербург)	Региональная	5	392	2 007,2	411,2	0,71
20	Классика (Челябинск)	Локальная	2	177	1 875,9	575,3	0,67
21	Родник здоровья&ЛекОптТорг (Санкт-Петербург)	Региональная	4	117	1 590,7	520,2	0,56
22	Губернские аптеки (Красноярск)	Локальная	2	189	1 529,3	435,5	0,54
23	Мега Фарм (Москва)	Региональная	5	235	1 340,7	442,8	0,48
24	Дешевая аптека (Ростов-на-Дону)	Региональная	3	79	1 330,1	701,2	0,47
25	Farmani&Аптечество (Нижний Новгород)	Региональная	4	214	1 312,6	424,9	0,47
26	Алоэ БСС (Санкт-Петербург)	Федеральная	18	220	1 300,0	447,0	0,46
27	Фармакор (Санкт-Петербург)	Федеральная	16	227	1 285,6	412,3	0,46
28	Флория (Москва)	Региональная	4	190	1 226,2	503,3	0,44
29	ФармИмЭкс (Москва)	Федеральная	17	255	1 213,9	471,4	0,43
30	Областной аптечный склад (Челябинск)	Локальная	2	255	1 155,8	361,4	0,41
31	Здоровье (Усть-Лабинск)	Локальная	2	92	1 120,4	588,1	0,40
32	Петербургские аптеки (Санкт-Петербург)	Локальная	1	83	1 117,5	496,1	0,40
33	Фармэконом (Иркутск)	Локальная	1	73	1 112,1	641,2	0,39
34	Антей (Вологда)	Региональная	5	182	1 051,7	525,8	0,37
35	Алия-Фарм (Самара)	Региональная	5	120	1 027,0	538,1	0,36
36	Эдельвейс (Кемерово)	Региональная	4	126	994,1	540,8	0,35
37	Новосибирская аптечная сеть (Новосибирск)	Локальная	1	105	987,2	572,8	0,35
38	Семейная аптека (Благовещенск)	Региональная	5	121	972,3	559,1	0,35
39	Юг-Фарма (Ростов-на-Дону)	Региональная	3	130	964,8	541,5	0,34
40	Ставропольские городские аптеки (Ставрополь)	Региональная	3	174	903,1	395,0	0,32
41	ДЕЖУРНАЯ АПТЕКА (Москва)	Локальная	2	41	877,1	691,2	0,31
42	Волгофарм (Волгоград)	Локальная	1	133	854,5	407,5	0,30
43	Аптеки Столицы (Москва)	Локальная	1	80	849,1	556,5	0,30
44	ТриКа (Москва)	Региональная	4	53	817,7	573,3	0,29
45	Нижегородская областная фармация (Нижний Новгород)	Локальная	1	223	710,3	3691	0,25
46	Фармакон&Клюква (Ижевск)	Региональная	3	145	619,4	406,1	0,22
47	ДИАЛОГ (Москва)	Локальная	2	33	604,2	720,0	0,21
48	Формула Здоровья (Мурманск)	Локальная	2	68	593,0	682,0	0,21
49	Мэтр (Брянск)	Федеральная	12	137	592,5	436,1	0,21
50	ОренЛек (Оренбург)	Локальная	1	127	587,6	385,7	0,21

Источник: AlphaRM

Таблица 4

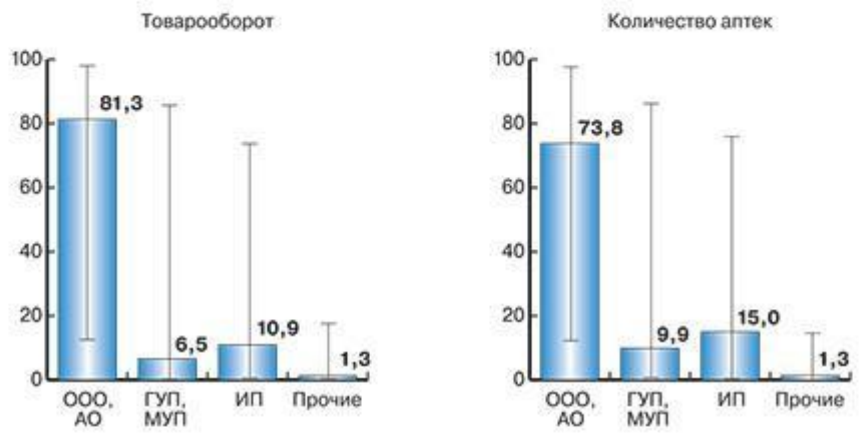
Характеристика аптечных сетей в зависимости от формы локализации, I кв. 2017 г.



Источник: AlphaRM

Рис. 5

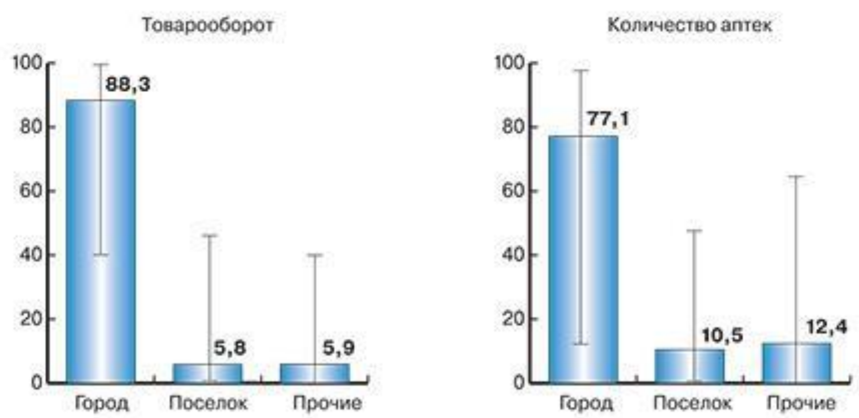
Долевое распределение различных параметров аптек по формам собственности в целом по стране и разброс по субъектам РФ, I кв. 2017 г., %



Источник: AlphaRM

Рис. 6

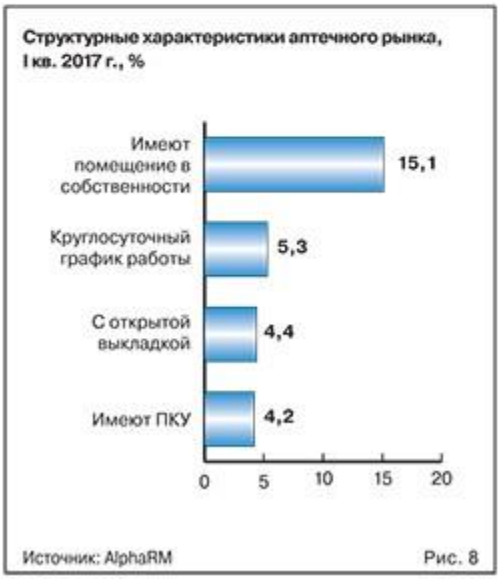
Долевое распределение различных параметров аптек по расположению в целом по стране и разброс по субъектам РФ, I кв. 2017 г., %



Источник: AlphaRM

Рис. 7

In the rating among federal pharmacy chains, *Doctor Stoletov & Ozerki* (Moscow) is the first by the average purchase amount (705 rubles), *Kalina-Pharm* (Veliky Novgorod) is the first among regional ones (766 rubles), *Samson-Pharma* (Moscow) is the first among local ones (1363 rubles), *Flora* (Volzhsky) is the first among small local ones (700 rubles.).



By number of pharmacy outlets, *Implosia* (Samara) is the first, both among all pharmacies, and among federal ones (1,891 pharmacy). Among the regional networks, the *Group 36.6* (Moscow) (1,755 pharmacy) is leading. Among the local networks, the network *Bashpharmacia* (Ufa) includes the most pharmacies (301). Among small local ones, *Flora* (Volzhsky) and *Apteka na Inskom* (Novosibirsk) (9 pharmacies) are leaders.

Based on the results of 2016, local networks are leading in terms of the total number of pharmacy outlets (18,500), followed by small local networks with 12.7 thousand pharmacies, then federal networks with 11.3 thousand pharmacies, single pharmacies with 10.1 thousand pharmacies; regional networks close the list with 7.8 thousand pharmacies. In terms of the total turnover in the first quarter of 2017, the local networks were first (28.4 billion rubles), followed by federal networks (24.9 billion rubles), regional networks (19 billion rubles), small local networks (12.6 billion rubles), and single pharmacies (11.7 billion rubles.). Regional networks have the maximum monthly average revenue in terms of one pharmacy (2.4 million rubles.), followed by federal networks (2.2 million rubles), local networks (1.5 million rubles), single pharmacies (1.2 million rubles) and small local networks (1.0 million rubles) (Figure 5).

The most popular form of ownership is a limited liability company or a joint stock company. 73.8% of pharmacy outlets accounting for 81.3% of turnover, have this form of ownership. They are followed by individuals who registered their status of entrepreneurs and run 15% of pharmacies, which together account for 10.9% of turnover. 9.9% of pharmacies with a turnover of 6.5% are in the state and municipal property (Figure 6).

As it was to be expected, the lion's share of pharmacies is located within the city limits: 77.1% of pharmacies accounting for 88.3% of total turnover. Only 10.5% of pharmacies with a total turnover of 5.8% are located in townships or villages (Figure 7). Among the pharmacies, 15% of the outlets have the retail space in their ownership; 24-hour pharmacies make up 5.3% of all pharmacies, 4.4% of pharmacies work with open assortment display, 4.2% of pharmacies sell medicinal products subject to strict record keeping and storage (Figure 8).

* Each constituent entity of the Federation has its own scale for evaluating pharmacy institutions: category B includes pharmacies with average regional revenues; category A includes pharmacies with a turnover above the average; category A + includes pharmacies that have “super-profits” (the turnover per month exceeds the average regional revenue by more than 2.5 times in a particular region); category C includes pharmacies with a turnover below the average; category C- includes “super-unprofitable” pharmacies (their turnover per month is much lower than the average regional level).

Read more: http://www.pharmvestnik.ru/publs/lenta/v-rossii/dura-lex-prnt-17-m5-887.html