

DEVELOPMENT FACTORS OF THE RETAIL MARKET

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DEVELOPMENT FACTORS OF THE RETAIL MARKET

Structure of pharmacy segment



Ratio of network and individual pharmacies



Market leaders



Main categories of the retail segment



Consumption structure by districts



Factors and price structure



STRUCTURE OF PHARMACY SEGMENT



STRUCTURE OF PHARMACY SEGMENT IN ALMATY CITY

Region name	Category of total product turnover	Number of pharmacies	Product turnover
Almaty	A1	33	23 530 876 826
	A2	71	15 478 599 288
	B	177	17 579 221 277
	C	400	14 313 364 895
	D	343	3 839 614 351
	New pharmacy	71	0
Total		1 095	74 741 676 637

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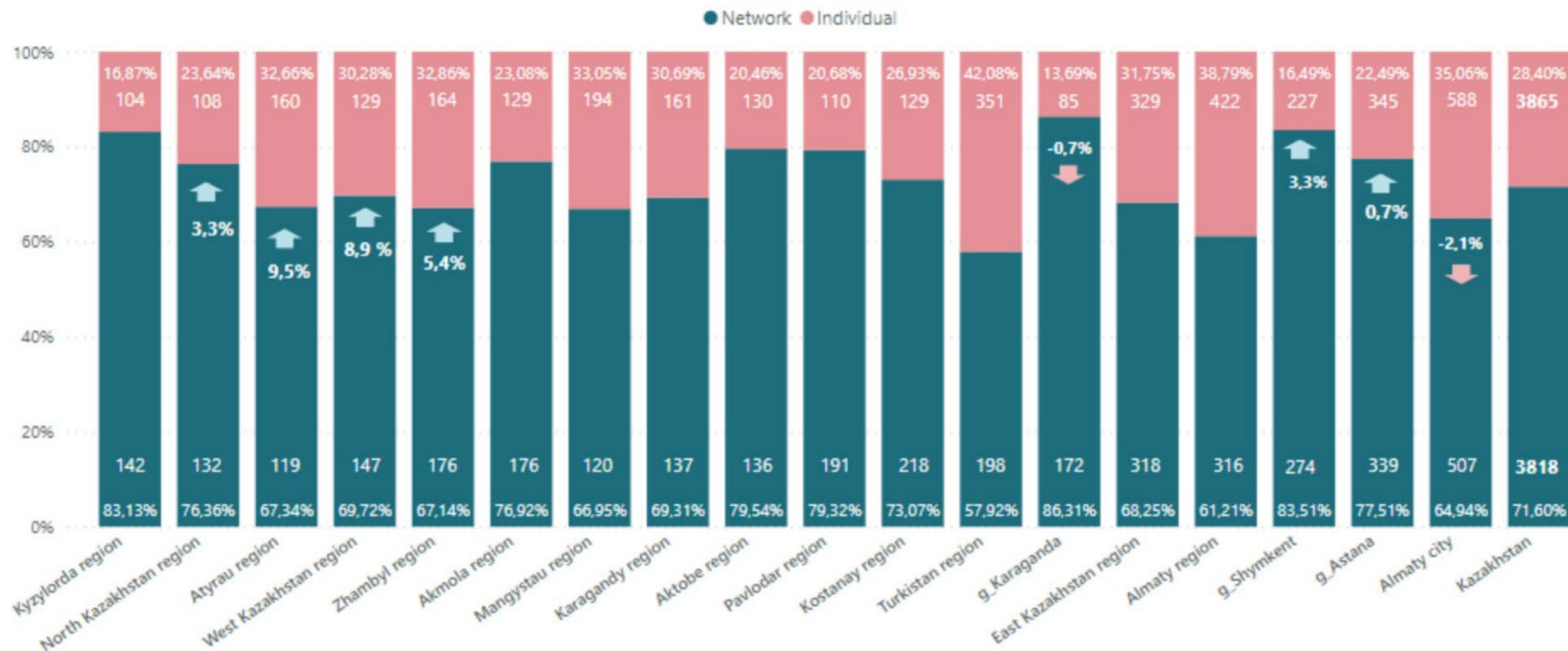
Consumption structure by districts



Factors and price structure



Ratio of individual and network pharmacies for 9 months of 2022



Network - 3 818

Individual - 3 865

Total of pharmacies in the Republic of Kazakhstan - 7 683



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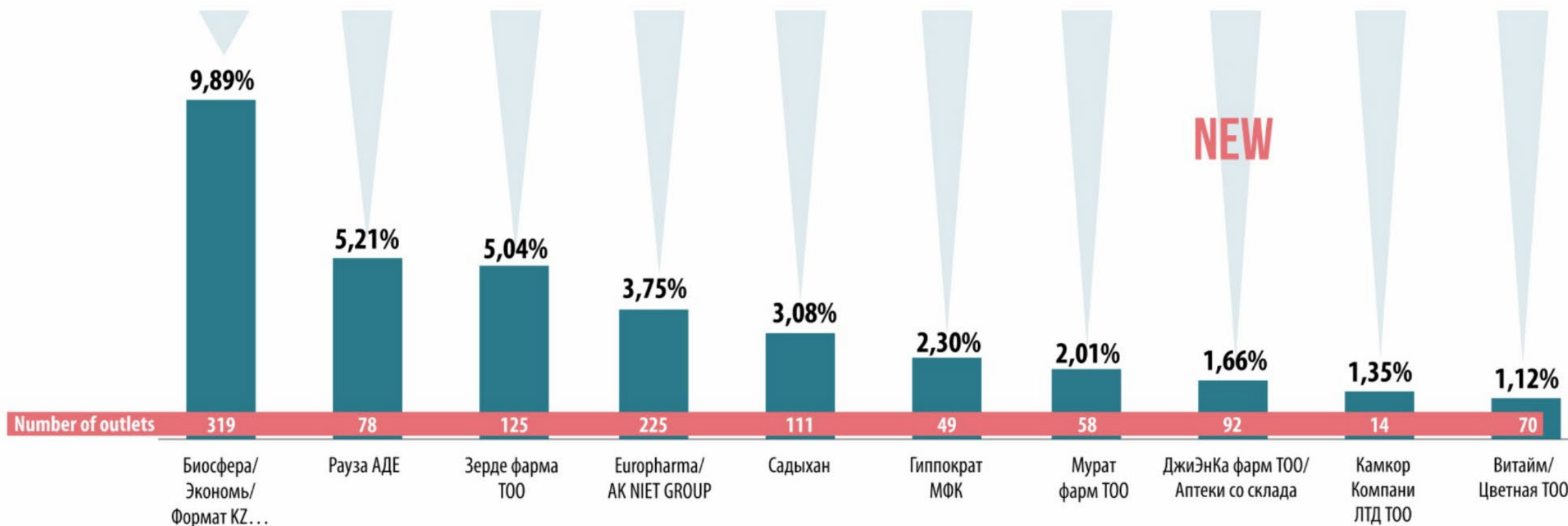


TOP-10 PHARMACY NETWORKS ON THE RETAIL MARKET FOR YTD SEPTEMBER 2022

Dynamics for 9 months of 2022

2022/2021

Ranking	— 0	▲ 1	▲ 1	▼ -2	— 0	— 0	▲ 1	▲ 5	— 0	— 0
MS	▼ -0,38%	▼ -0,12%	▲ 1,28%	▼ -1,69%	▼ -0,56%	▲ 0,40%	▲ 0,45%	▲ 0,95%	▲ 0,17%	▲ 0,10%
Number of pharmacies	▲ 7	▲ 31	▲ 28	▼ -36	▲ 14	▼ -6	▲ 8	▲ 65	▲ 1	▲ 4



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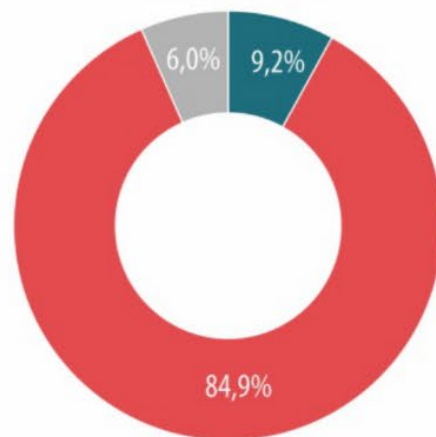


Factors and price
structure

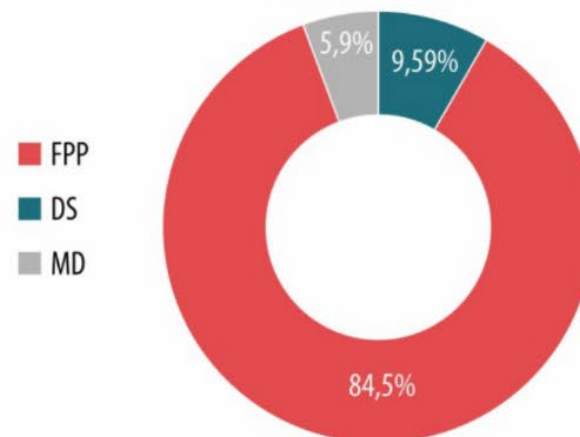


SALES VOLUME OF DIETARY SUPPLEMENTS AND MEDICAL DEVICES WITH THE DEVELOPMENT DYNAMICS FOR YTD SEPTEMBER 2022

Main segments of the retail market for 9 months of 2022



Main segments of the retail market for 9 months of 2021

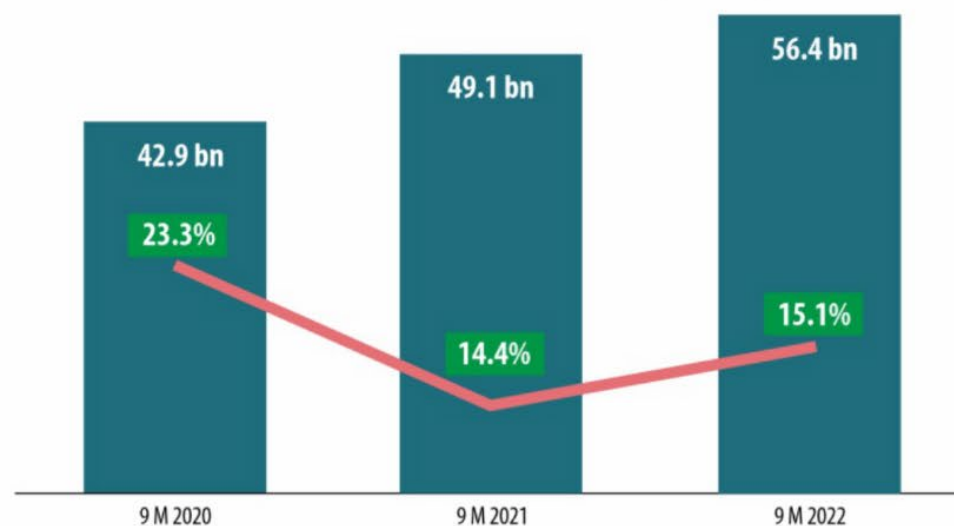


FPP
DS
MD

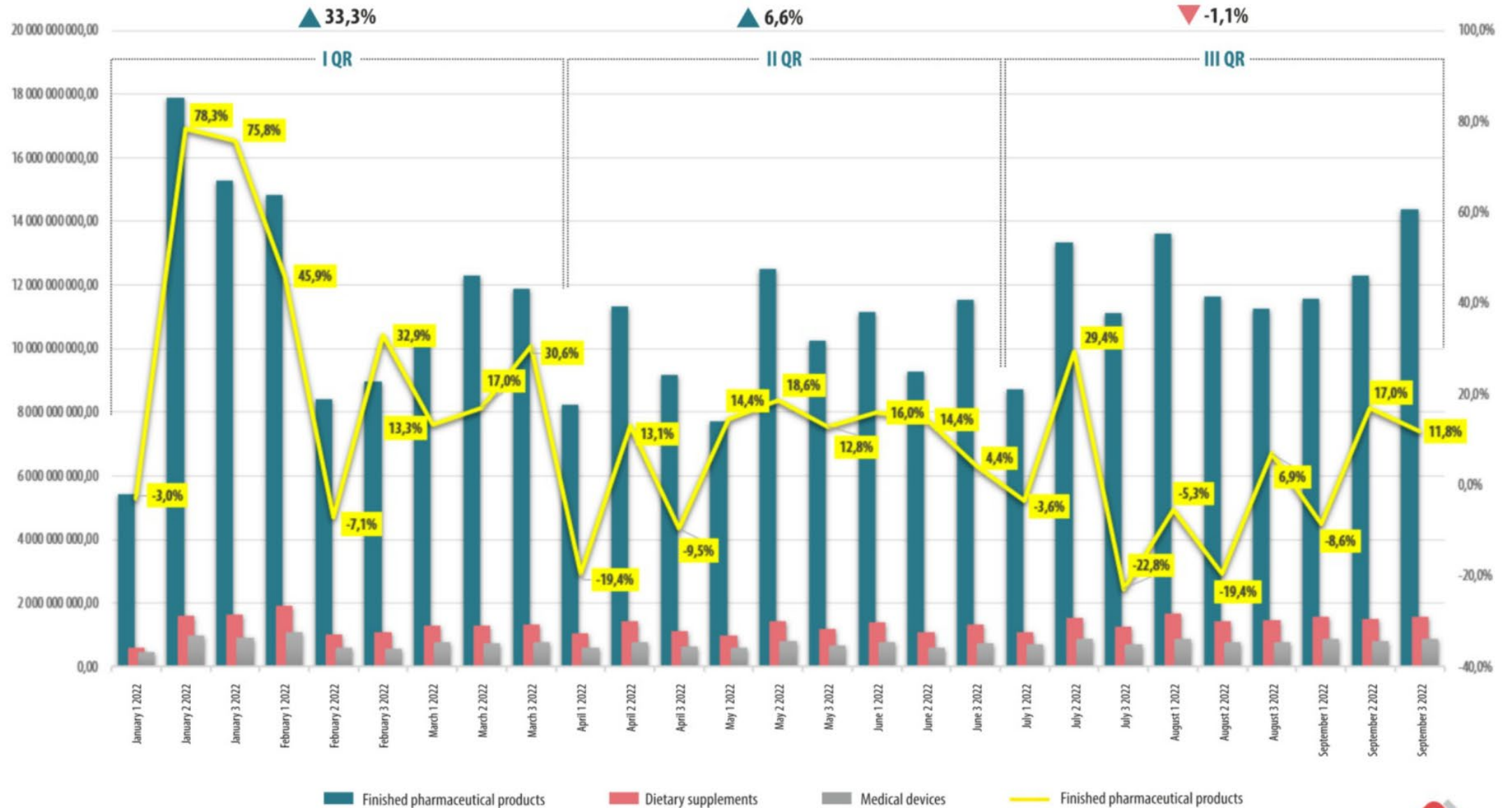
Volume of the retail market of FPP, DS, MD



Sales volume of DS and MD with the development dynamics



FPP, DS, MD BY THE DECADES OF 2022



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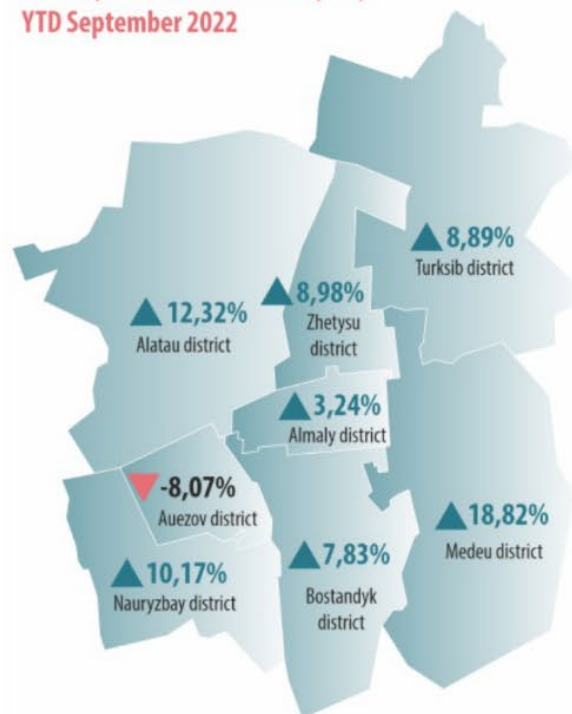
MARKET IN ALMATY ACROSS DISTRICTS FOR 9 MONTHS OF 2022

Growth in Almaty

6%

-3%

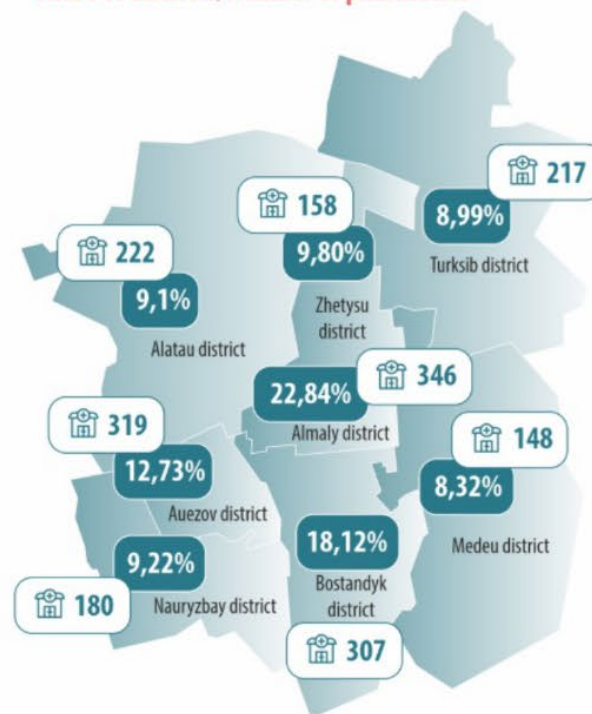
Sales dynamics across Almaty city
YTD September 2022



Sales dynamics of TOP-10 brands in Almaty YTD September 2021

1	Heptral	820,0	▲ 10,6%
2	Ursosan	660,9	▲ 4,8%
3	Creon	605,4	▲ 24,9%
4	Tropicamid	584,4	▲ 40,4%
5	Nimesil	572,1	▲ 37,2%
6	Tanflex	560,3	▲ 108,6%
7	Viferon	540,2	▲ 14,9%
8	Ethyl alcohol	524,8	▲ 11,8%
9	Canephron	488,9	▲ 16,4%
10	Actovegin	486,9	▲ 11,4%

Share of districts/Number of pharmacies



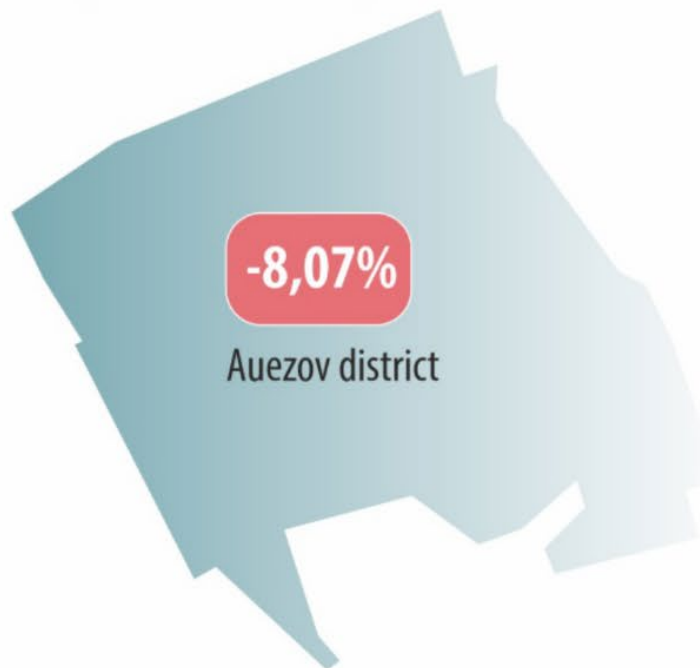
Sales dynamics of TOP-10 brands in Almaty YTD September 2021

1	Xarelto	1 023,0	▲ 12,7%
2	Heptral	741,2	▲ 51,3%
3	Ursosan	630,6	▲ 54,3%
4	Creon	484,7	▲ 16,2%
5	Viferon	470,0	▲ 44,7%
6	Ethyl alcohol	469,6	▼ -23,1%
7	Groprinosin	444,0	▲ 7,4%
8	Actovegin	437,0	▲ 16,4%
9	Sodium chloride	423,5	▲ 2,4%
10	Canephron	420,1	▲ 15,8%

MARKET IN AUEZOV DISTRICT FOR 9 MONTHS OF 2022

Growth in Auezov district  -8,1%  -17,4%

Sales dynamics across Auezov district
YTD September 2022/YTD September 2021



Sales dynamics of TOP-10 brands in Auezov district
YTD September 2022

1	Binocrit	108,5	▲	223,0%
2	Heptral	93,8	▼	-25,2%
3	Ethyl alcohol	87,7	▲	2,5%
4	Ursosan	80,1	▲	8,0%
5	Creon	72,2	▲	13,5%
6	Nimesil	72,2	▲	24,0%
7	Groprinosin	65,7	▲	2,5%
8	Canephron	64,8	▲	9,0%
9	Avastin	61,8	▲	1728,0%
10	Sodium chloride	60,6	▼	-18,3%

Sales dynamics of TOP-10 brands in Auezov district
YTD September 2021

1	Cineset	191,3	▼	-7,7%
2	Xarelto	130,3	▲	51,9%
3	Heptral	125,5	▲	106,1%
4	Viferon	97,0	▲	89,1%
5	Ethyl alcohol	85,6	▲	144,8%
6	Theraflu	77,2	▲	33,9%
7	Actovegin	75,4	▼	-17,6%
8	Ursosan	74,1	▲	51,9%
9	Sodium chloride	74,1	▲	100,0%
10	Groprinosin	64,1	▲	27,2%

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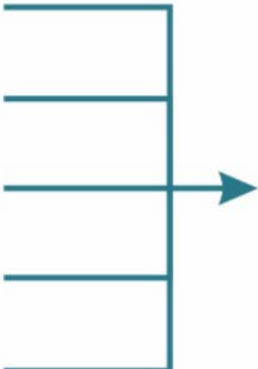
Consumption structure by districts



Factors and price structure



- Change of the currency rate in March
- **Change in the price structure**
- Internal and external geopolitical climate
- Outstock in April
- Outbreak of the enterovirus infection

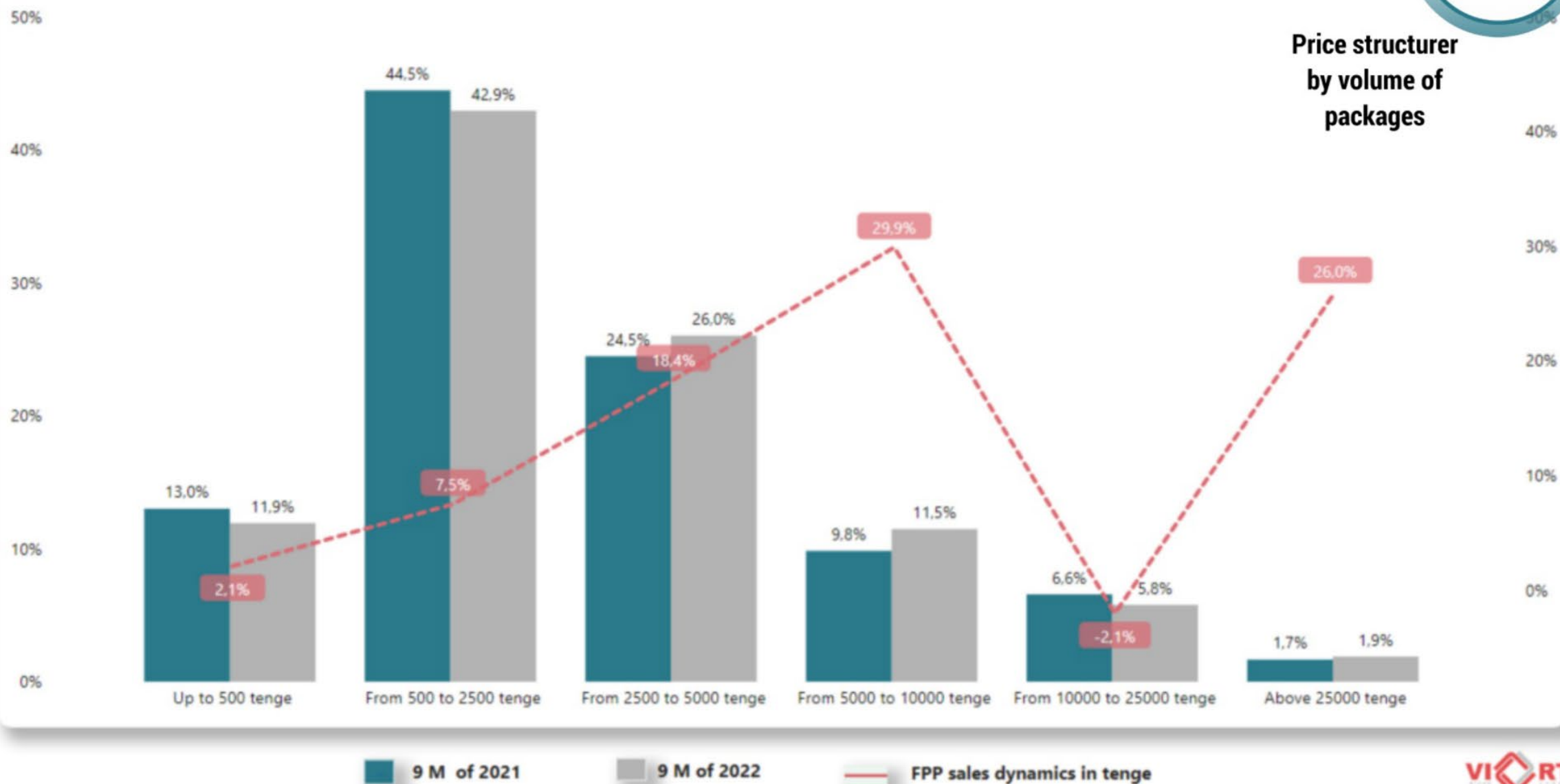


11,2%

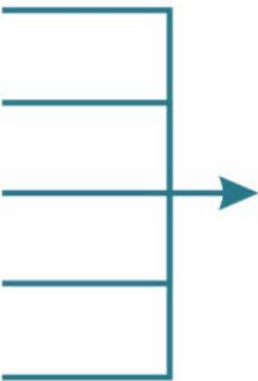
Price structure of the retail market for YTD September by value



Price structure
by volume of
packages



- Change of the currency rate in March
- Change in the price structure
- Internal and external geopolitical climate
- Outstock in April
- Outbreak of the enterovirus infection



11,2%

THANK YOU FOR THE ATTENTION!

**Pharmaceutical retail market
for the period of YTD September 2022**

