

# **RUSSIAN RETAILERS – UNQUESTIONED LEADERS**



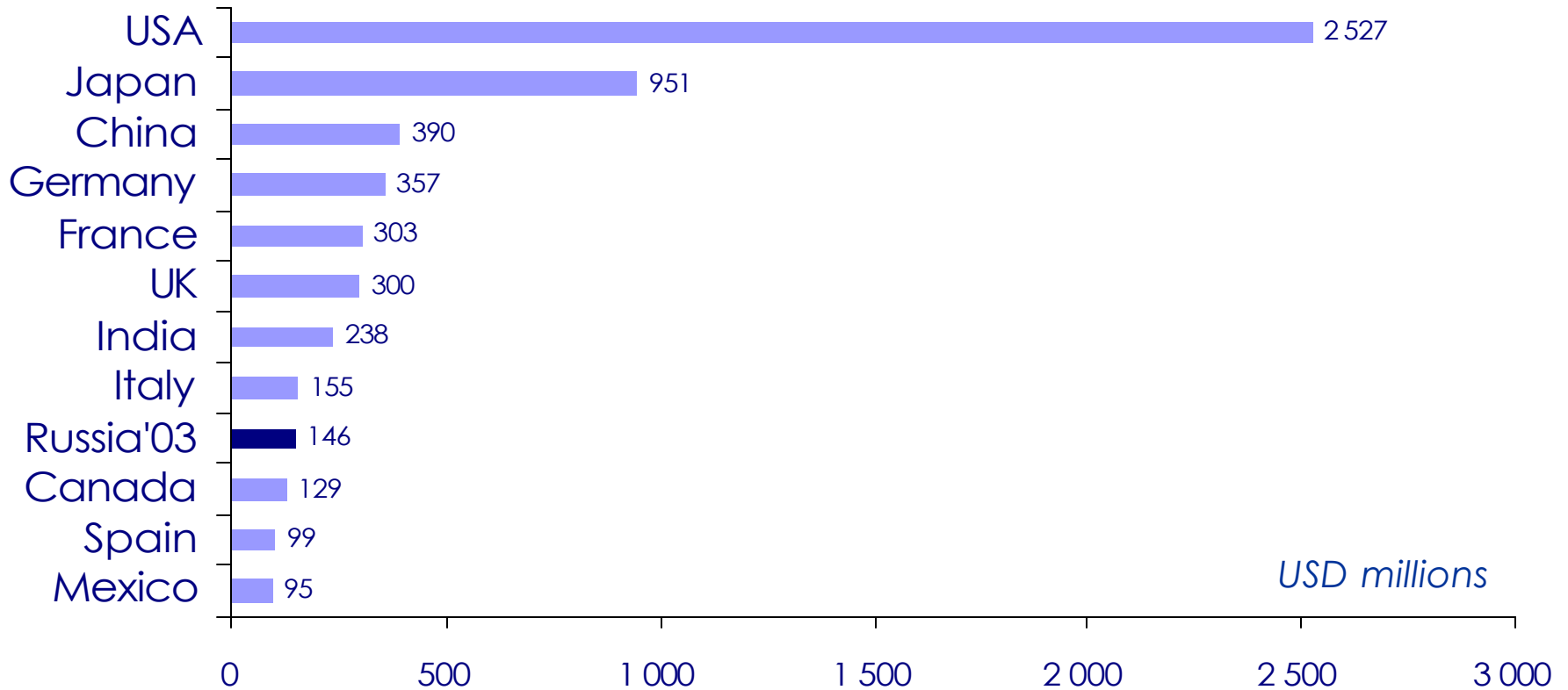
**by Artem BEKTEMIROV**

**CEO, Pharmacy Chain 36.6**

# TOP-10 WORLD RETAIL MARKETS



SALES BY COUNTRY, 2001

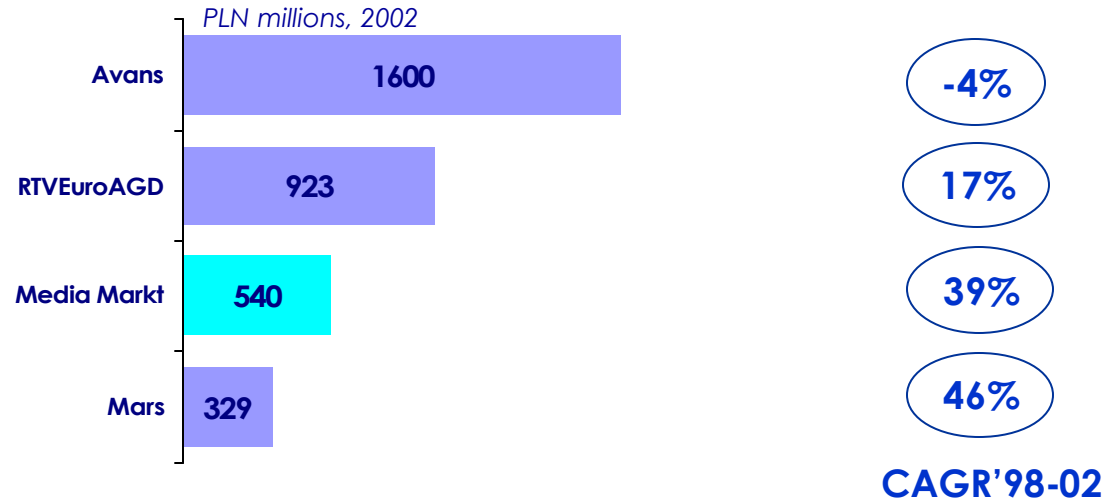




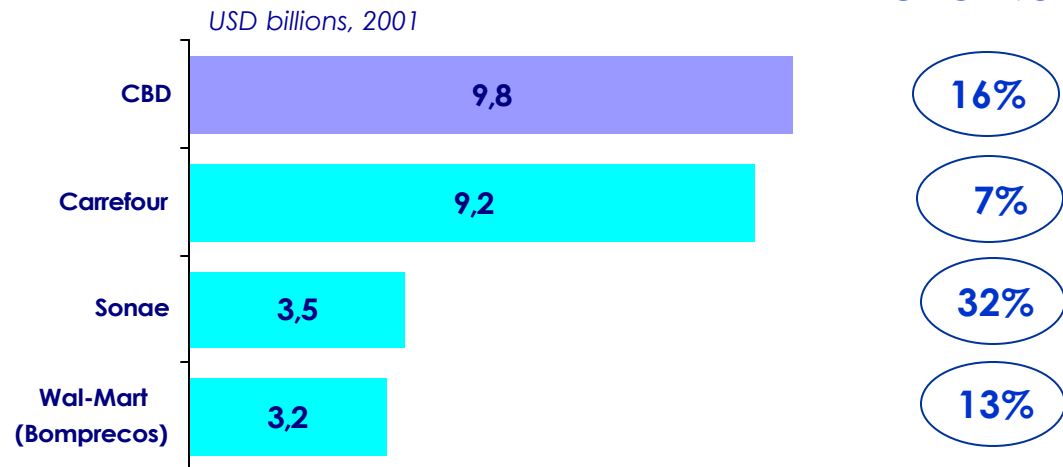
# DOMESTIC VS. INTERNATIONAL RETAILERS

International players

POLAND'S ELECTRONICS



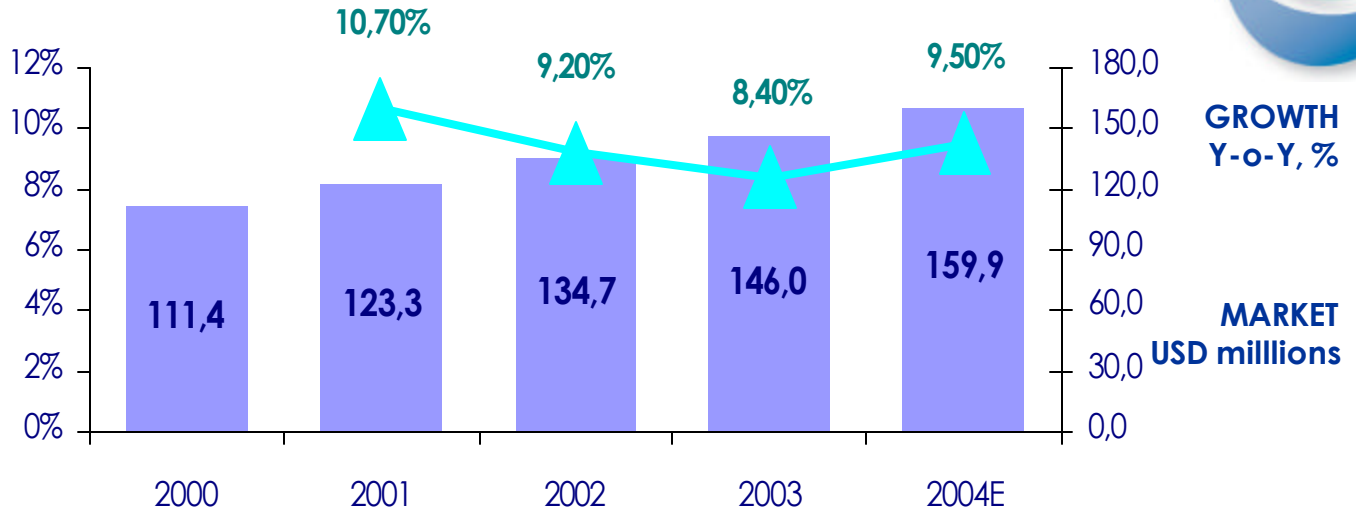
BRAZIL'S FOOD



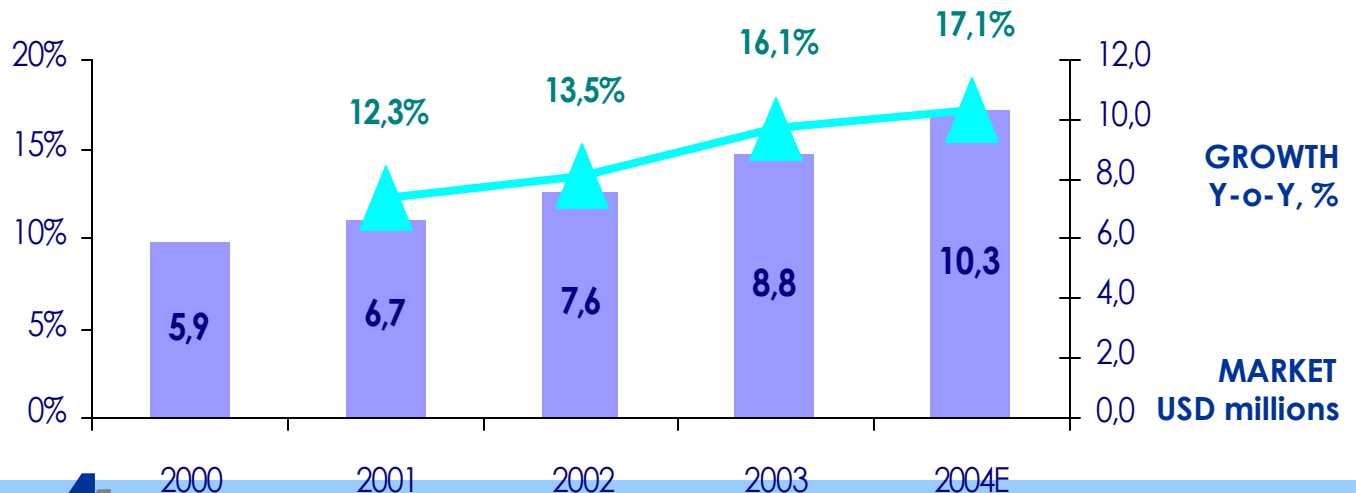


# RUSSIAN RETAIL GROWTH

## RUSSIA'S RETAIL



## RUSSIA'S PHARMA AND H&B RETAIL



# INTERNATIONAL RETAILERS IN RUSSIA



Few  
multinationals  
successfully  
adopt their  
business models  
in Russia

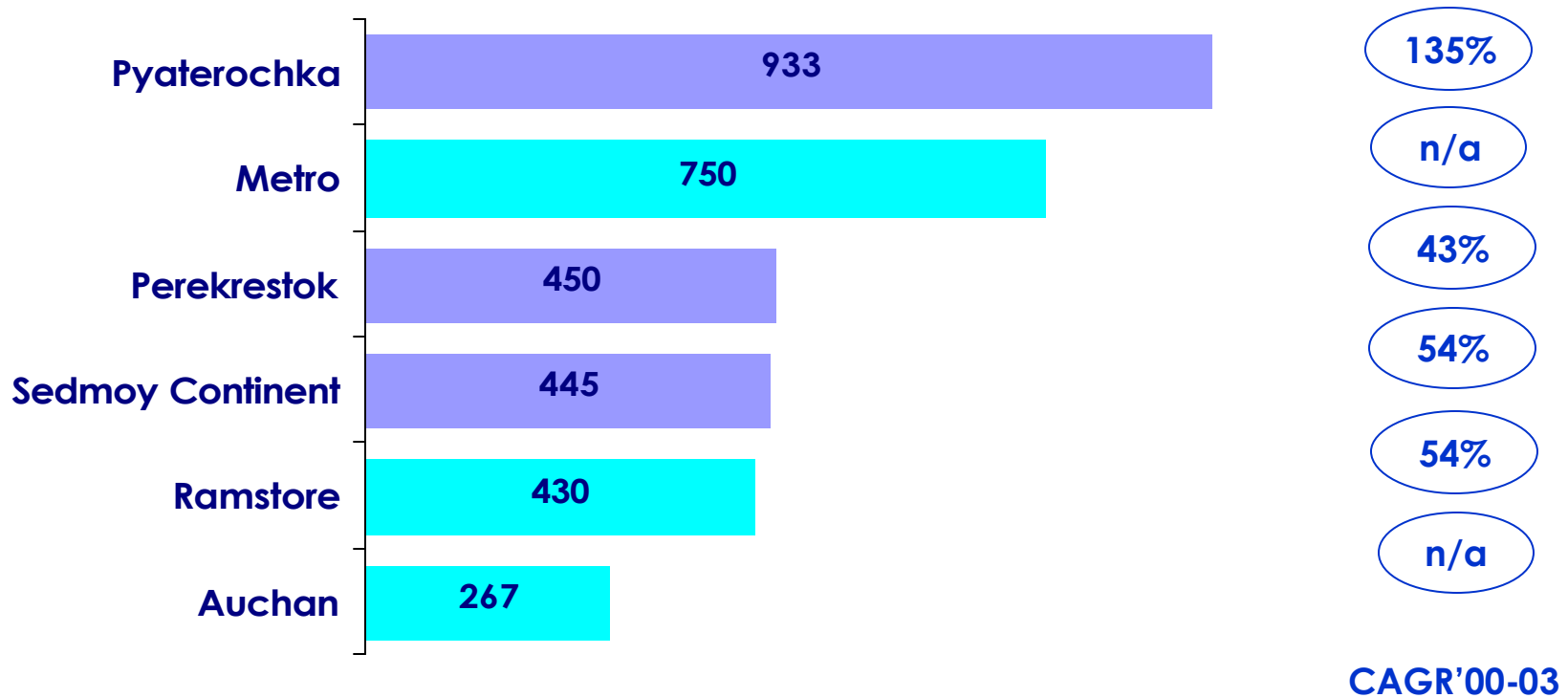
- McDonald's, BP, banks
- Metro, Auchan, OBI, Wal-Mart
- Mariannaud, Sephora, Douglas
- Boots, Walgreens, CVS

# RUSSIAN FOOD RETAILERS



 International players

USD millions, 2003



# WHY DOMESTIC PLAYERS WILL DOMINATE



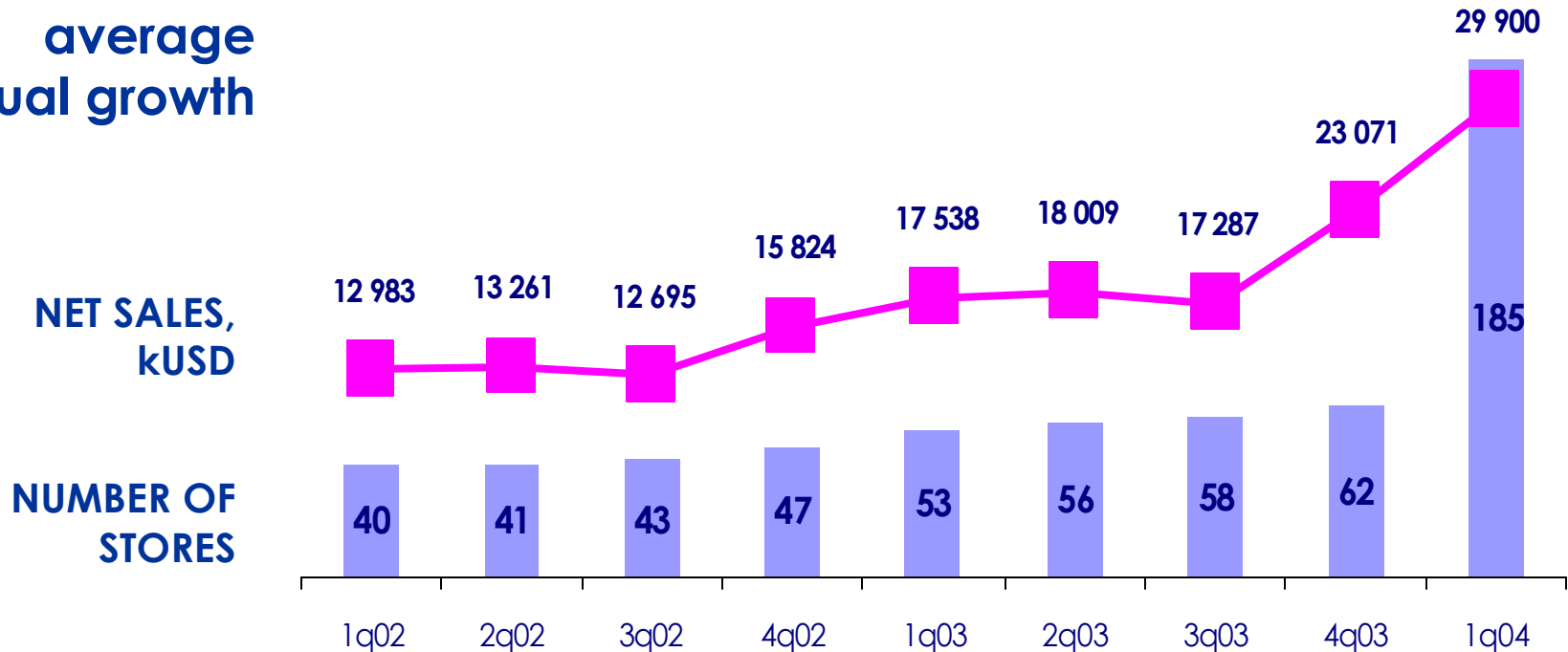
- **Efficient business model**
- **Investments in infrastructure and technologies**
- **Best international standards**

**BECAUSE THEY KNOW RUSSIA'S  
140 MILLION CONSUMERS**

# PHARMACY CHAIN 36.6 GROWTH

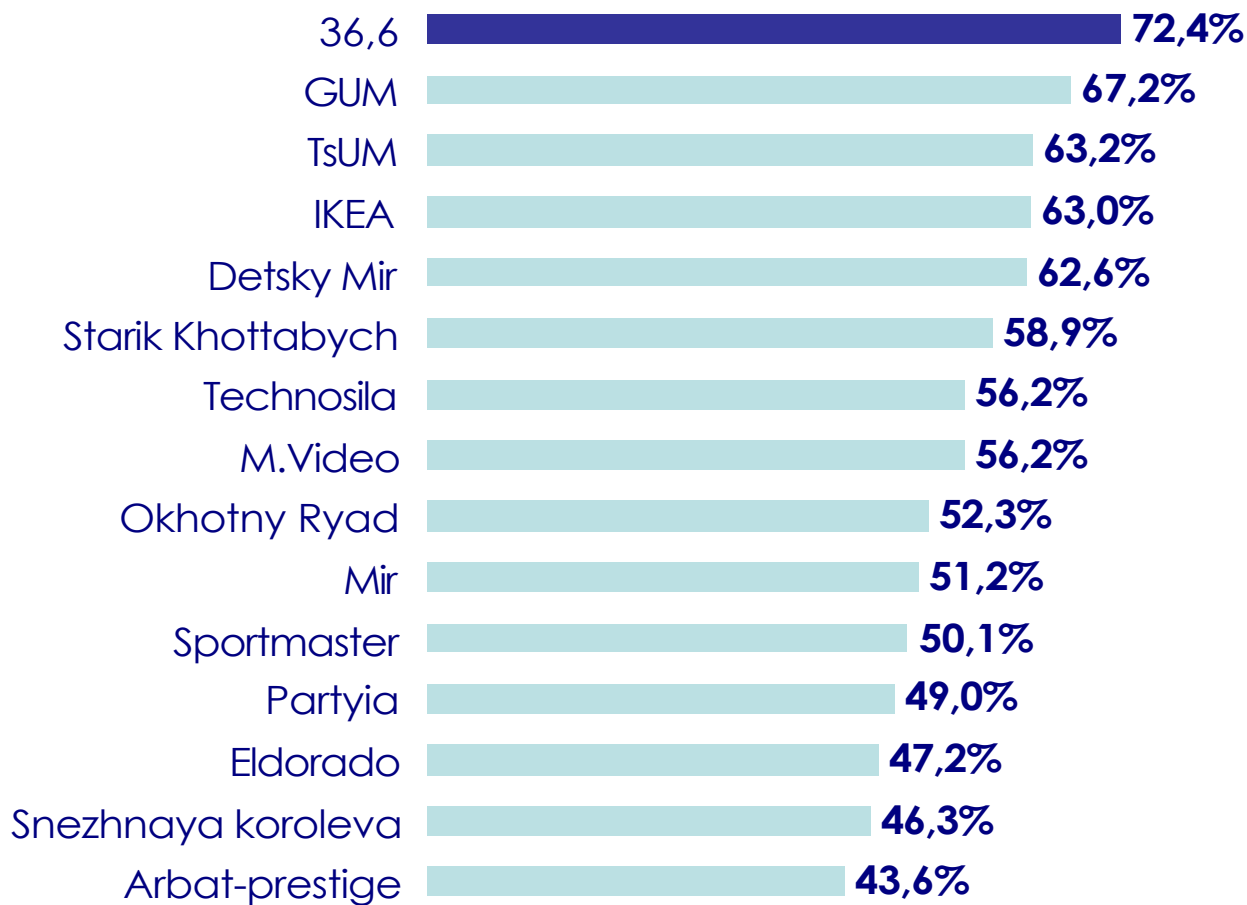


**47%**  
average  
annual growth





## 36.6 – WE KNOW OUR CUSTOMER

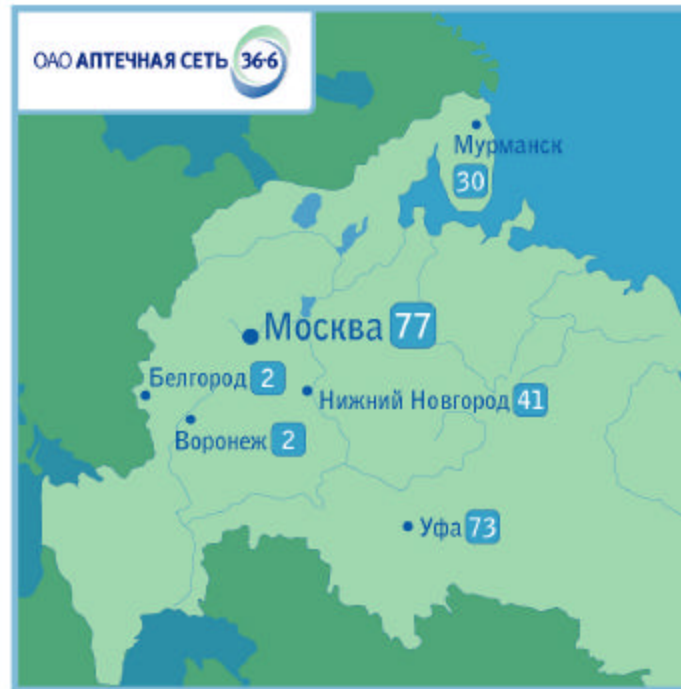


**GALLUP BRAND  
AWARENESS  
SURVEY, 2003**

## 36.6 – CONSTATLY DISCOVERING OUR CUSTOMERS



Innovation and  
regional  
expansion  
delivers value  
proposition to our  
customers  
nationwide



## 36.6 – HEALTHY, FIT & STRONG FOR INVESTORS



- Healthy performance**
- Fit domestic player**
- Strong business model**

# PHARMACY CHAIN

The logo for the pharmacy chain, featuring the number '36-6' in a bold, blue font inside a circular emblem. The emblem consists of two concentric rings, the outer one being light blue and the inner one being a darker blue, creating a sense of depth and movement.

36-6

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