



How we built the collaborative
program from the Shopper
Centric.

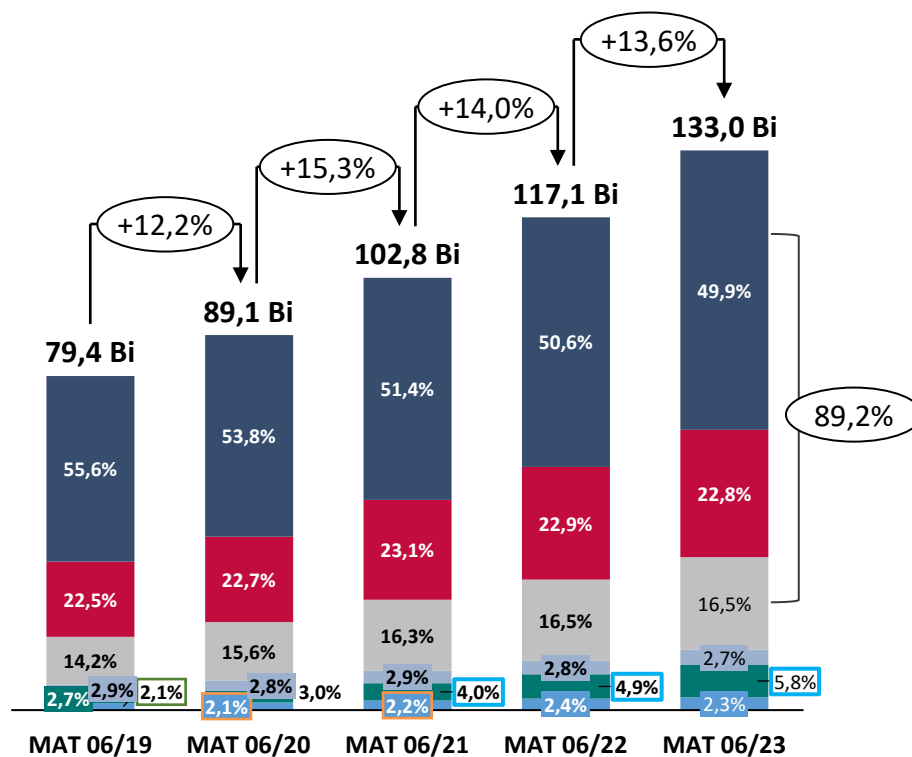
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**Program of
Excellence in the
Service to the
Drug Shop**

The Brazilian market consists of ~90 thousand pharmacies.
About 30 economic groups with approximately 12 thousand PDVs, represent 50% of the market demand (Big Chains).

Pharmacy Channel - Subchannel Detail

Pharmacy Market- DISCOUNTED R\$



Growth MAT	Growth YTD
13,6%	11,4%
12,0%	9,2%
13,2%	11,4%
13,7%	11,2%
13,1%	12,9%
34,4%	36,2%
9,1%	4,1%

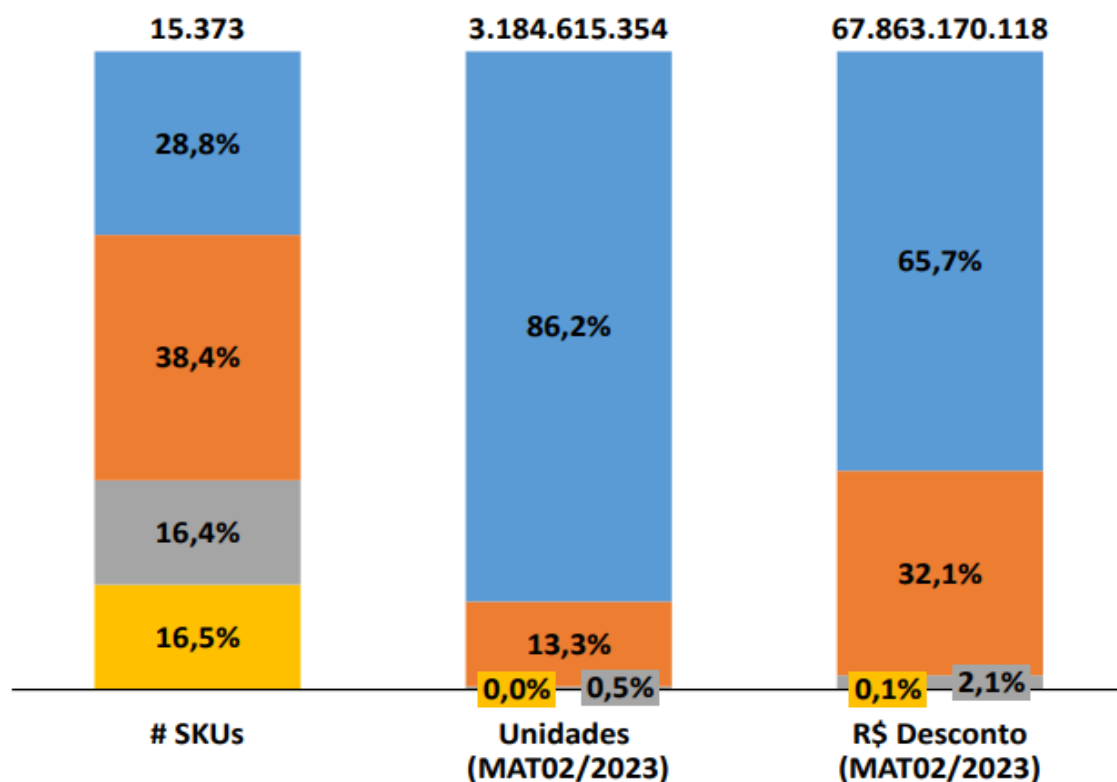
- BIG CHAINS
- INDEPENDENT
- ASSOCIATIVIST
- SMALL CHAINS
- DIGITAL
- MIDDLE CHAINS

Regardless of the channels of operation, in the POS Shopper finds several options for the same SKU, whether similar brand, or generic.

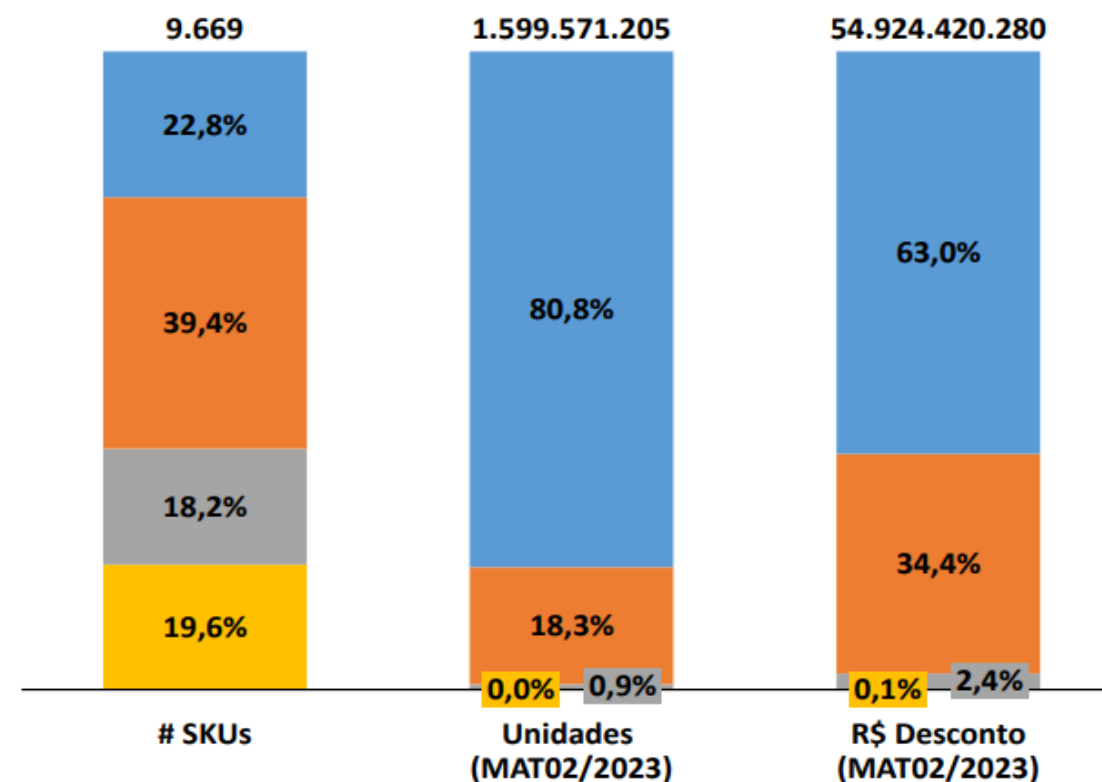
This represents greater complexity for the retailer and friction in the purchase of medicines.

Market demand for prescription products (with and without generics) according to average turnover:

SKU for POS – Prescription Medicines



SKU for POS – Prescription Medicines **without** Generics



At least 1 Unit per Month
At least 1 Unit per Trimester
At least 1 Unit per Semester
At least 1 Unit since Semester

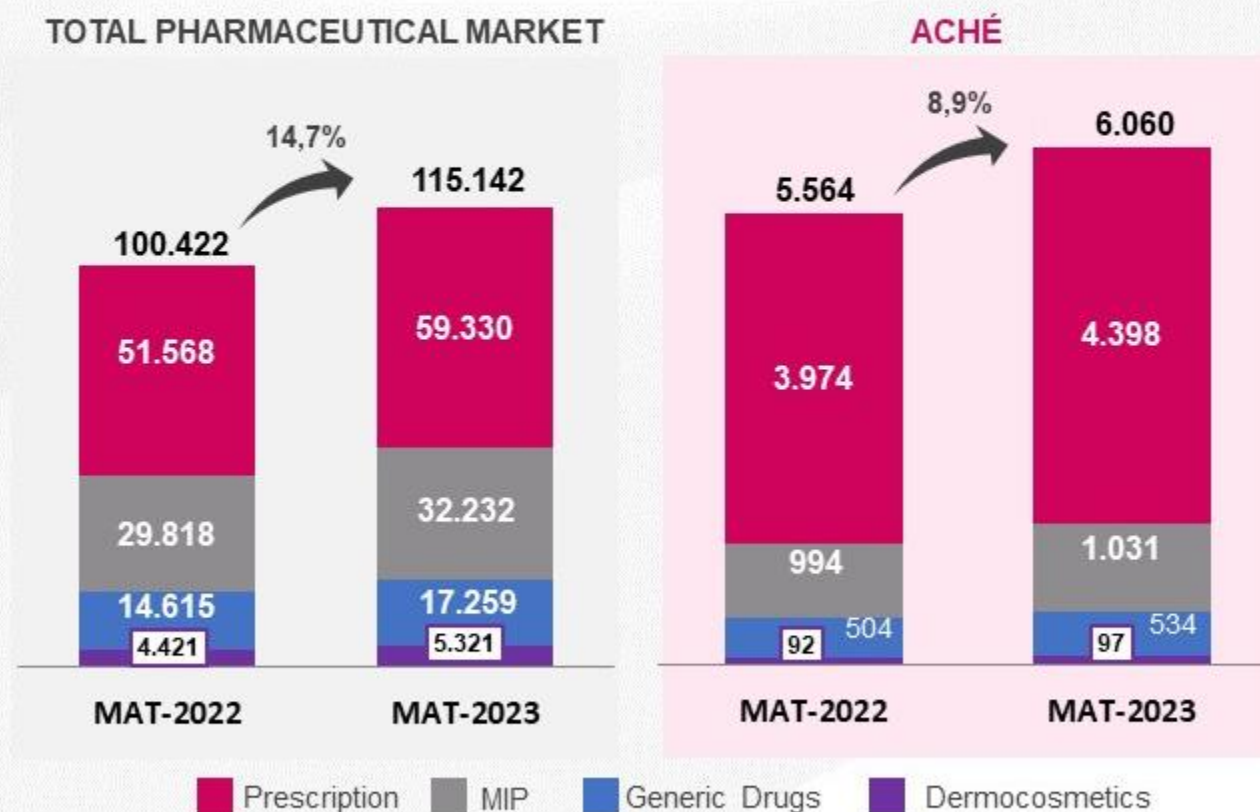
Aché is a Top Laboratory of Medical Prescription, this segment is your's *core* business and has expertise of +56 years of operation.

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ACHÉ PERFORMANCE x RETAIL PHARMACEUTICAL MARKET (PMB PPP REAIS)

R\$ MM

TOTAL PHARMACEUTICAL MARKET



Source: IQVIA – PPP – MAT JULY 2023

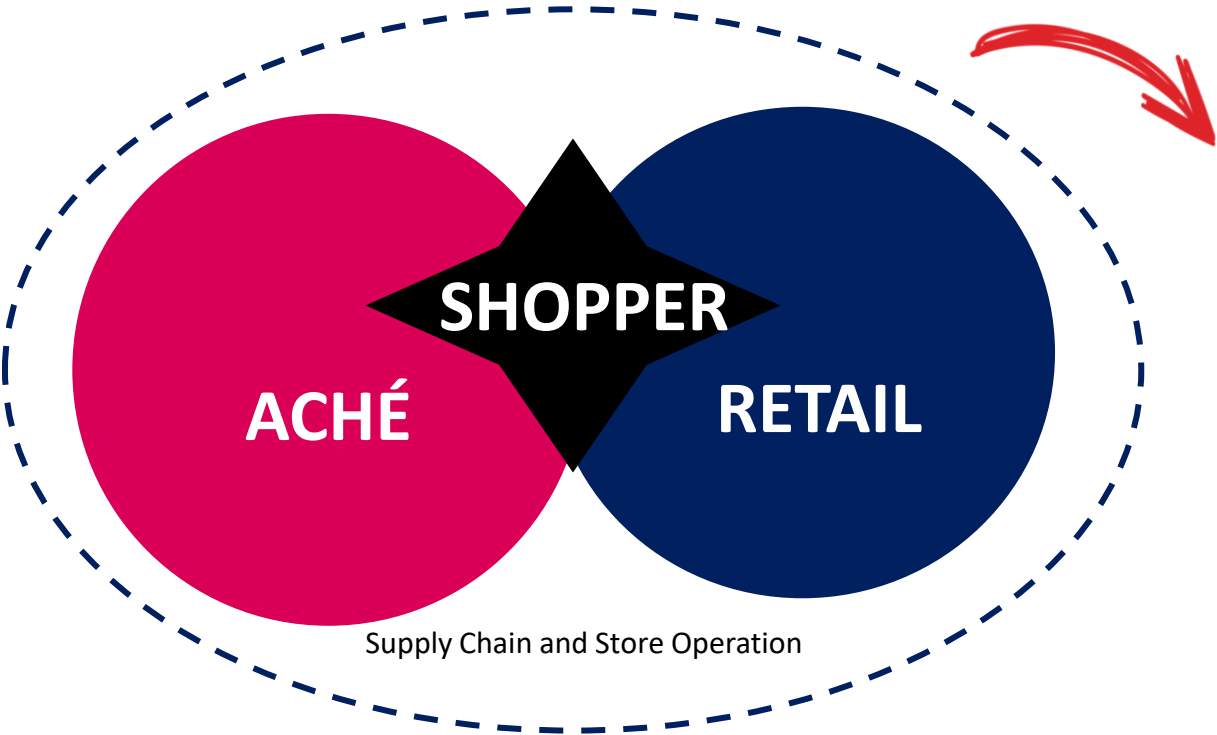
TOP 10 MOST PRESCRIBED LABORATORIES

POSITION	LABORATORY
1 st	EUROFARMA
2 nd	ACHÉ
3 rd	EMS PHARMA
4 th	MERCK
5 th	GSK
6 th	BIOLAB
7 th	MANTECORP FARMASA
8 th	LIBBS
9 th	SANOFI
10 th	ASPEN

Source: IQVIA – Prescription MAT JULY 2023

The dispensing of medicines at the pharmacy counter represents **+85% of the public** who enters a store in BR, **+70% of the revenue** and is **therefore its reason to exist**.

With the **Shopper culture at the heart of the strategy**, we started a journey with the **ambition of improving the shopping experience at the counter of medicines**, in the physical and digital environments, **from research and collaborative action** between Aché and Retail:



Know to Meet:

SHOPPERS OF MEDICINES: MAPPED PROFILES

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The **4 identified profiles** cover the vast majority of customers. Importantly, a single customer can match more than one profile, varying with their needs at the time of purchase.

35% **Resolutives**

26% **Silvers**

21% **Consumerist**

17% **Head of the House**

They have one common feature: they cannot be pressed

A informação contida nesta comunicação é de propriedade Aché e destinada exclusivamente ao uso da pessoa ou entidade a quem se dirige e outros autorizados a recebê-la.

HOW THEY WANT TO BE MET

From the arrival at the counter of attendance and request of the drug, we have three models to know:



1

RECEPTIVE

Attendance is limited to meet the customer's request

44%

It is the profile **best rated by the majority.**

Not giving purchase **options** is a **disadvantage for some, however**
Doesn't get to be a nuisance.



Resolutives 48%



Head of the house 47%



Silvers 39%



Consumerist 44%

2

SEMIRECEPTIVE

Attendant **brings the requested product + another option** of generic or similar at the same time

42%

Profile **pleases a large part Of the population.**

Attempt to offer the best option
Medicine, (without forcing the exchange) and
demonstrating technical knowledge.



Resolutives 36%



Head of the house 42%



Silvers 49%



Consumerist 41%

3

INFLUENT

Attendant **brings the only option of generic or similar, encouraging the exchange** of the product.

14%

It is the profile with the highest index
Of rejection. Associate
To "push therapy".

The best evaluated among those who buy
medicines for acute use, with a lower education
profile.



Resolutives 16%



Head of the house 11%



Silvers 12%



Consumerist 15%

HOW IS THE ADHERENCE IN THE POS AND WHAT ARE THE OPPORTUNITIES FOR THE RETAILER?

Mystery Shopper:

In **74%** of the services evaluated, there was no influence of the pharmacist or clerk in the purchase, but **there are opportunities in the service cascade.**



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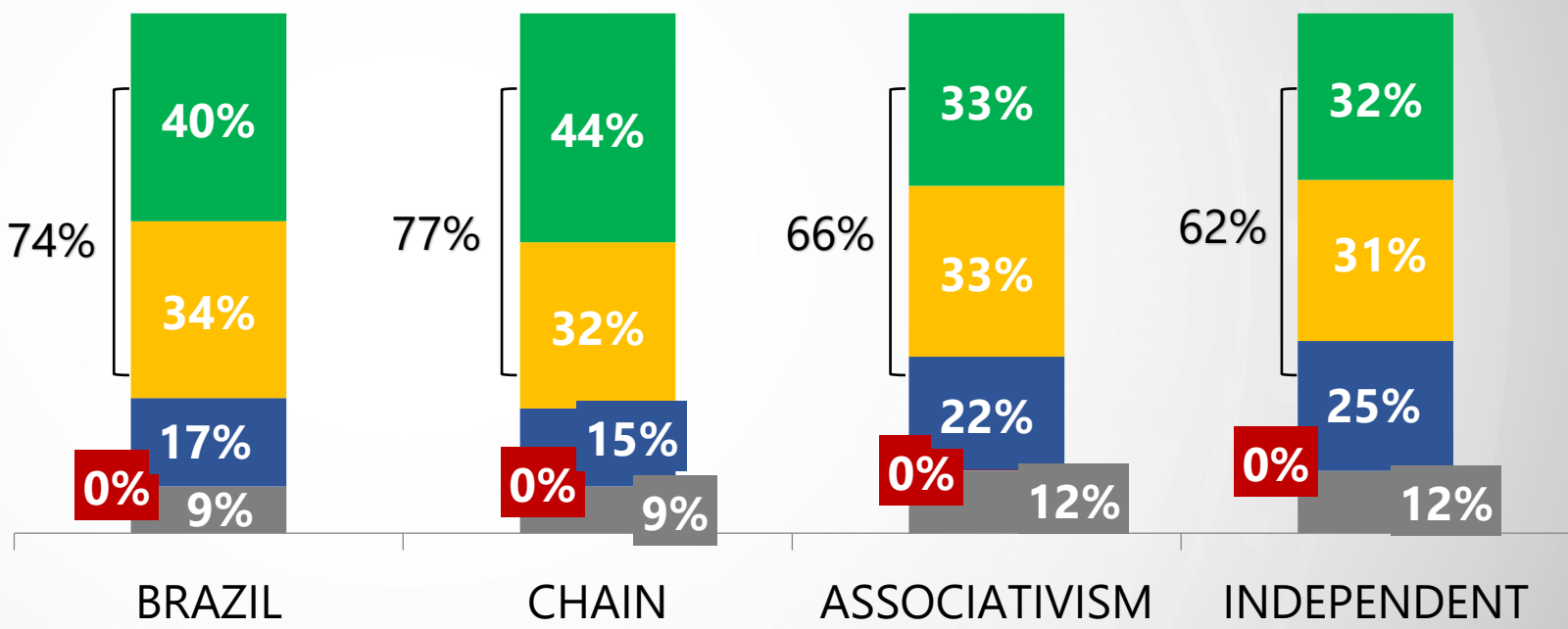
Em todos os Estados do Brasil em 120 bandeiras do grande e médio varejo



24

Moléculas Testadas 1º sem 2023





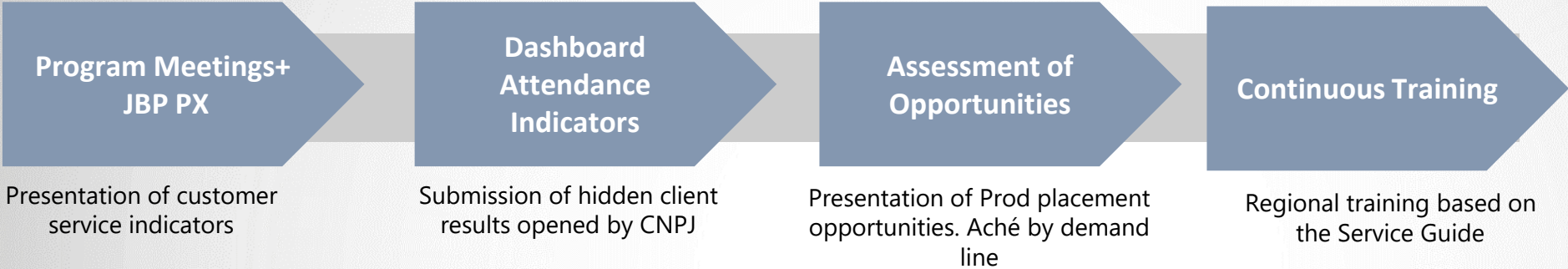
- Receptive
- No Offer Available
- SemiReceptive
- Influent
- Just Another Option

SHARING OF RECURRING INDICATORS ON SERVICE:



Coverage of 75% of the drug market in Brazil

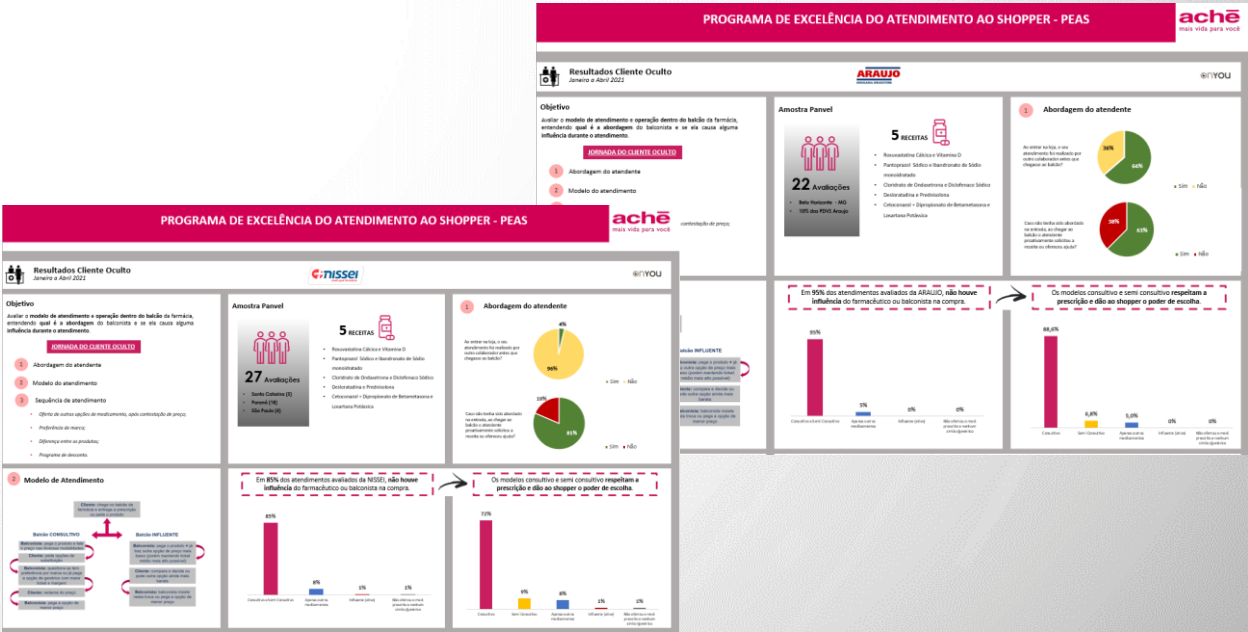
Customer Flow*:



ADHERENCE OF PHARMACIES



2022: 7 thousands
2023: +10 thousands
Customer reviews hidden



Learning from the Main Stages of Program Development



Launch The Guide Of Best Practices To Attendance on the Counter

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GUIA DE ATENDIMENTO
NO BALCÃO
DE MEDICAMENTOS

Goals of the Guide



Guidance on the profiles of customers



Guidance on the shopper preferences during the shopping experience



Support the retailer strategy and their choices about which the better attendance profile, to the best shopping experience



Eliminate frictions at the shopping experience, or other problems that frustrating the client



Maximize the results of retailers and supply chains, based on customer loyalty.



DOWNLOAD HERE



A photograph of two healthcare workers in a pharmacy. On the left, a man in a light blue shirt and a white face mask is looking towards the right. On the right, a woman in a white lab coat, glasses, and a white face mask is gesturing with her hands as if explaining something. They are standing in front of shelves stocked with various boxes of medicine. The text 'Discuss, Disseminate best practices and support development, acting collaboratively' is overlaid in pink on the image.

Discuss, Disseminate best
practices and support
development, acting
collaboratively

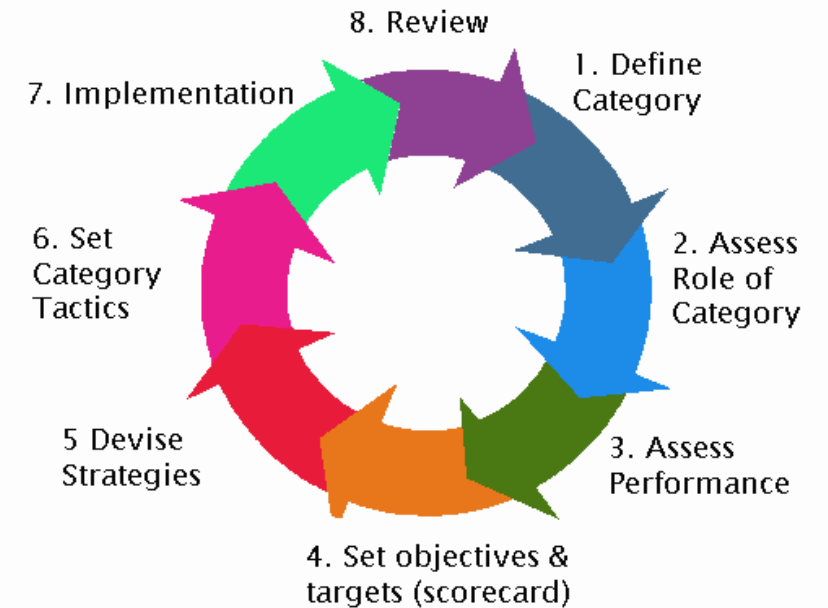
DEVELOPMENT SUPPORT AND OPPORTUNITY CAPTURE

Ensure **AVAILABILITY with SUSTAINABILITY** through the methodology of Catman,
in the main attribute of choice and **loyalty of the Shopper to the POS**

What is it:

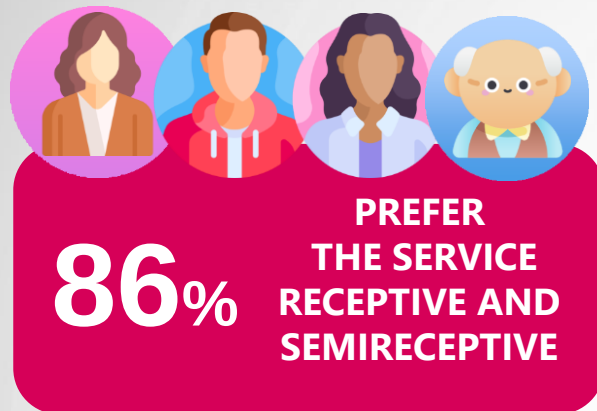
- Strategic and **collaborative partnership**;
- **Vision of category** and purchasing behaviour;
- Connecting prescribing habits for strategy and cross Category;
- **Mission of purchase solutions** (Chronic and Acute Treatments);
- **Recommendation of the assortment** and priority mix;-

Methodology of the **08 CatMan Steps**



BENEFITS OF IND-VAR PROGRAM AND COLLABORATION

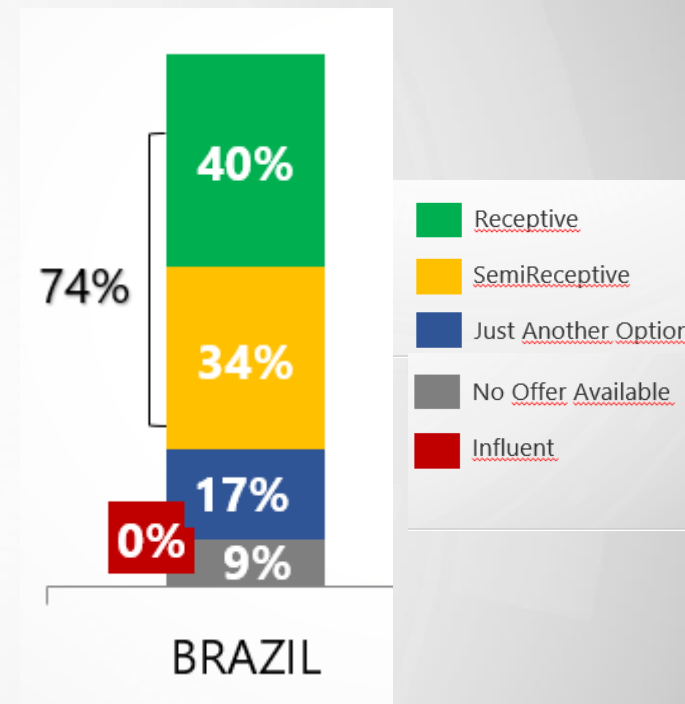
Program of Excellence in Service to the Medicine Shopper



 **Greater Availability and Better Assortment**

 **Lesser Rejection**

Brazilian's Market attendance YTD JUN 23



Journey of Excellence in Service to the Medicine Shopper



SURVEYS, CUSTOMER SERVICE AUDIT & KPIS:

1. Segmentation and qualification of drug shoppers from 2 groups: chronic and acute use.
2. Understanding with clerks and pharmacists about the frictions and opportunities for dispensing medicines in the pharmacy environment.
3. Evaluation of the adherence of the service in the POS, in its various channels.



COMMUNICATION AND ENGAGEMENT

4. Debate and engagement of retailers on service preferences and best practices, their indicators and market opportunities.
5. Launch Service Guide at the Counter of Medicines with Good Practices (disseminate).



WIN-WIN

6. Support for the development of the VA: consulting services to act on opportunities, e.g.: GC Medicamentos.

Excellence in Care and Greater adherence to treatment.

Retail counterparts: Mkt trade spaces in Aché performance categories in Autoservice.

NEXT STEP



RECOGNITION

7. Annual event in recognition of the main Retailers in Service Excellence.





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Trade Marketing

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