

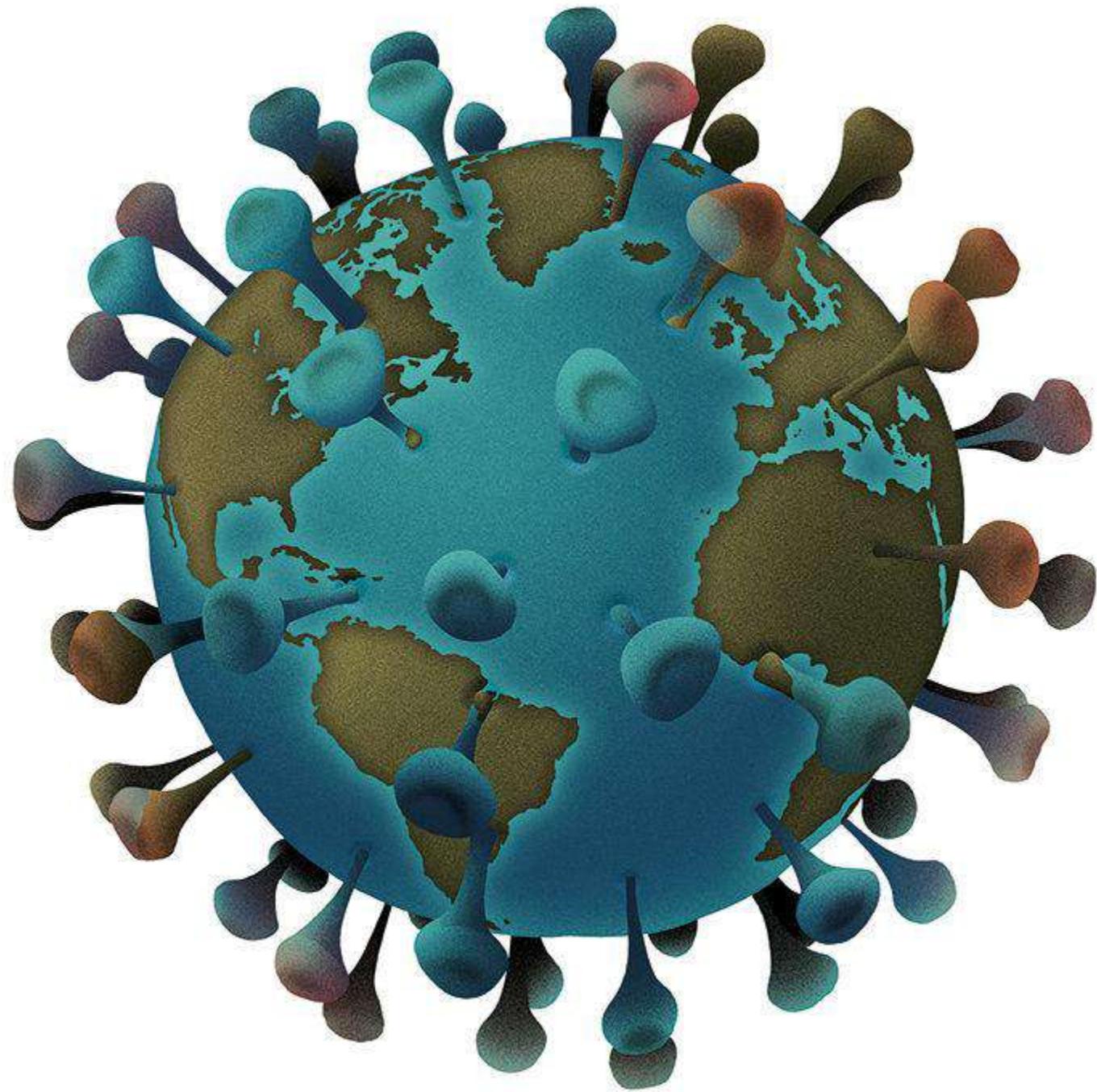


Abril 2020

Retos y Oportunidades en un Mercado Post-Covid19 (Retail farmacéutico)

Llegó el Coronavirus Covid-19

¿Cómo está impactando los negocios?

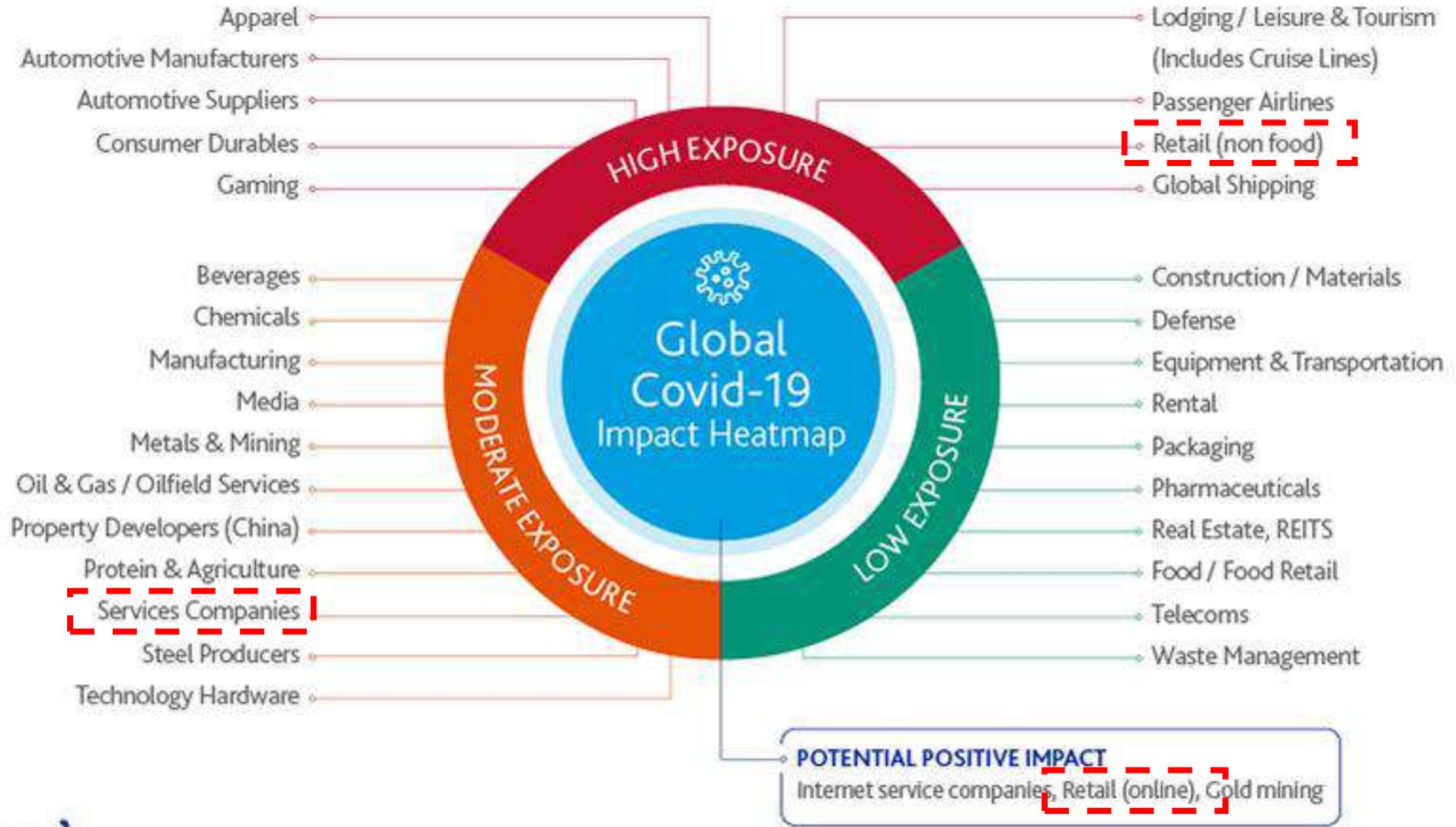




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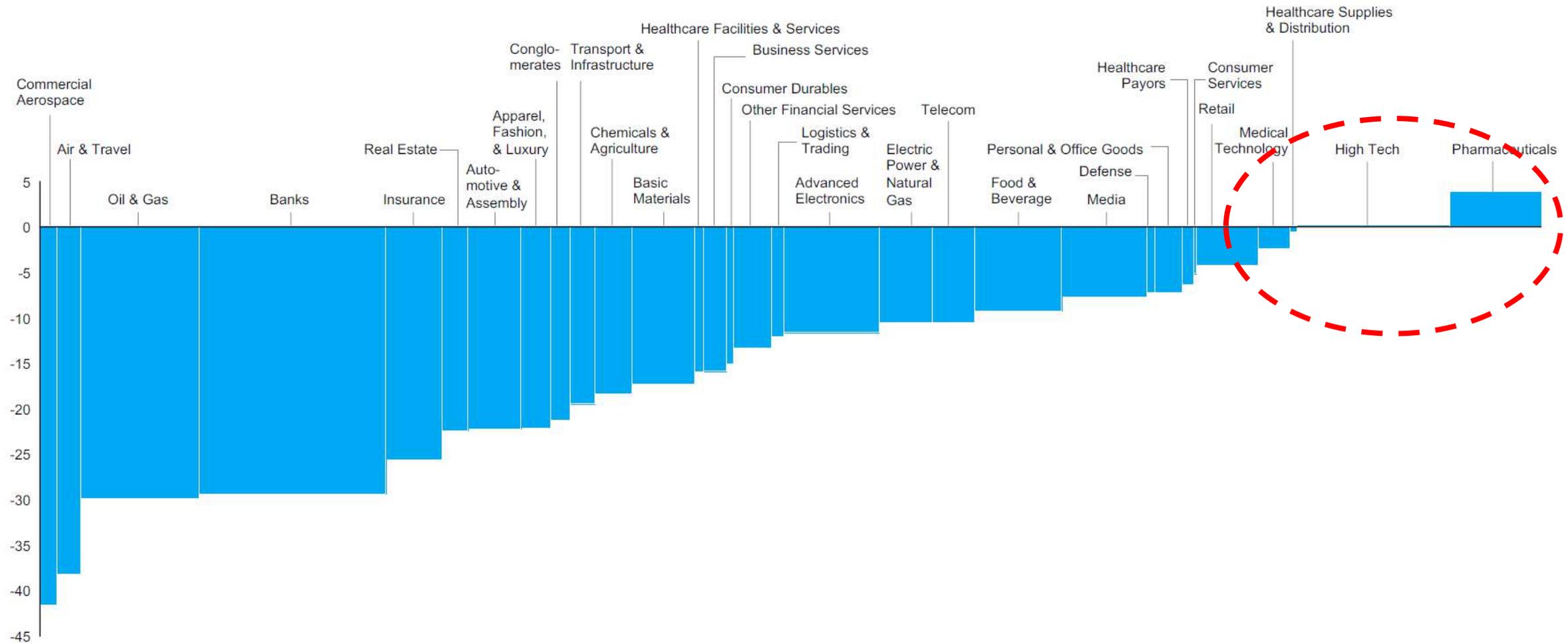
RadarLayout™: Coronavirus Impact Index by Industry

Categories affected by COVID-19	Banking, Financial Services & Insurance	Energy & Resources	Healthcare & Life Sciences	High Tech & Telecommunications	Media & Entertainment	Public Sector	Retail	Manufacturing	Universities & Colleges	Non-profits	Travel & Transportation
Personnel	Major	Major	Moderate	Major	Major	Major	Severe	Severe	Severe	Severe	Severe
Operations	Major	Major	Severe	Major	Severe	Moderate	Major	Severe	Moderate	Major	Severe
Supply Chain	Minor Impact	Severe	Major	Severe	Moderate	Minor Impact	Severe	Severe	Minor Impact	Minor Impact	Severe
Revenue	Severe	Major	Major	Severe	Major	Major	Major	Severe	Severe	Severe	Severe
Overall Avasant Assessment	Major	Major	Major	Major	Major	Major	Severe	Severe	Major	Major	Severe



Market capitalization has declined across sectors, with significant variation to the extent of the decline

Weighted average year-to-date local currency shareholder returns by industry in percent¹. Width of bars is starting market cap in \$



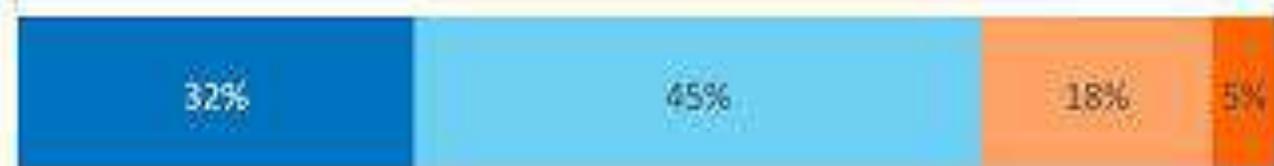
1. Data set includes global top 5000 companies by market cap in 2019, excluding some subsidiaries, holding companies and companies who have delisted since

Drug Channels Coronavirus Industry Impact Survey: Patient Behavior

When we look back on 2020, will the coronavirus have left a lasting mark on the drug channel by:

Increasing consumers' use of mail pharmacies instead of retail pharmacies

■ Very likely ■ Somewhat likely ■ Somewhat unlikely ■ Very unlikely



Count of Increasing consumers' use of clinics located in retail locations



0%

% of respondents (n=677)

100%

Source: Drug Channels Institute analysis of March 2020 survey results. Data exclude those who responded "unsure." Totals may not sum due to rounding.

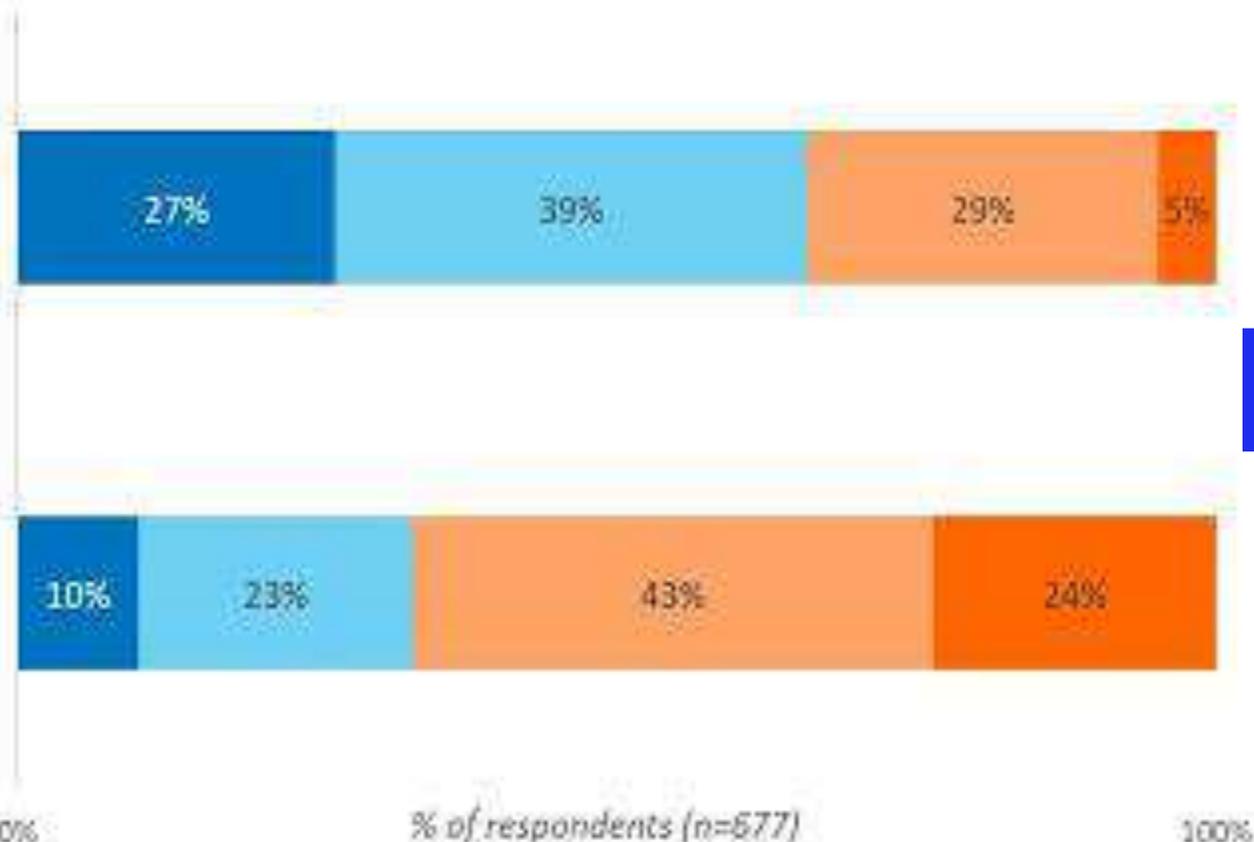
Published on Drug Channels (www.DrugChannels.net) on March 24, 2020.

Drug Channels Coronavirus Industry Impact Survey: Channel Impact

When we look back on 2020, will the coronavirus have left a lasting mark on the drug channel by:

Causing pharmaceutical wholesalers to increase average inventory levels of prescription drugs

■ Very likely ■ Somewhat likely ■ Somewhat unlikely ■ Very unlikely



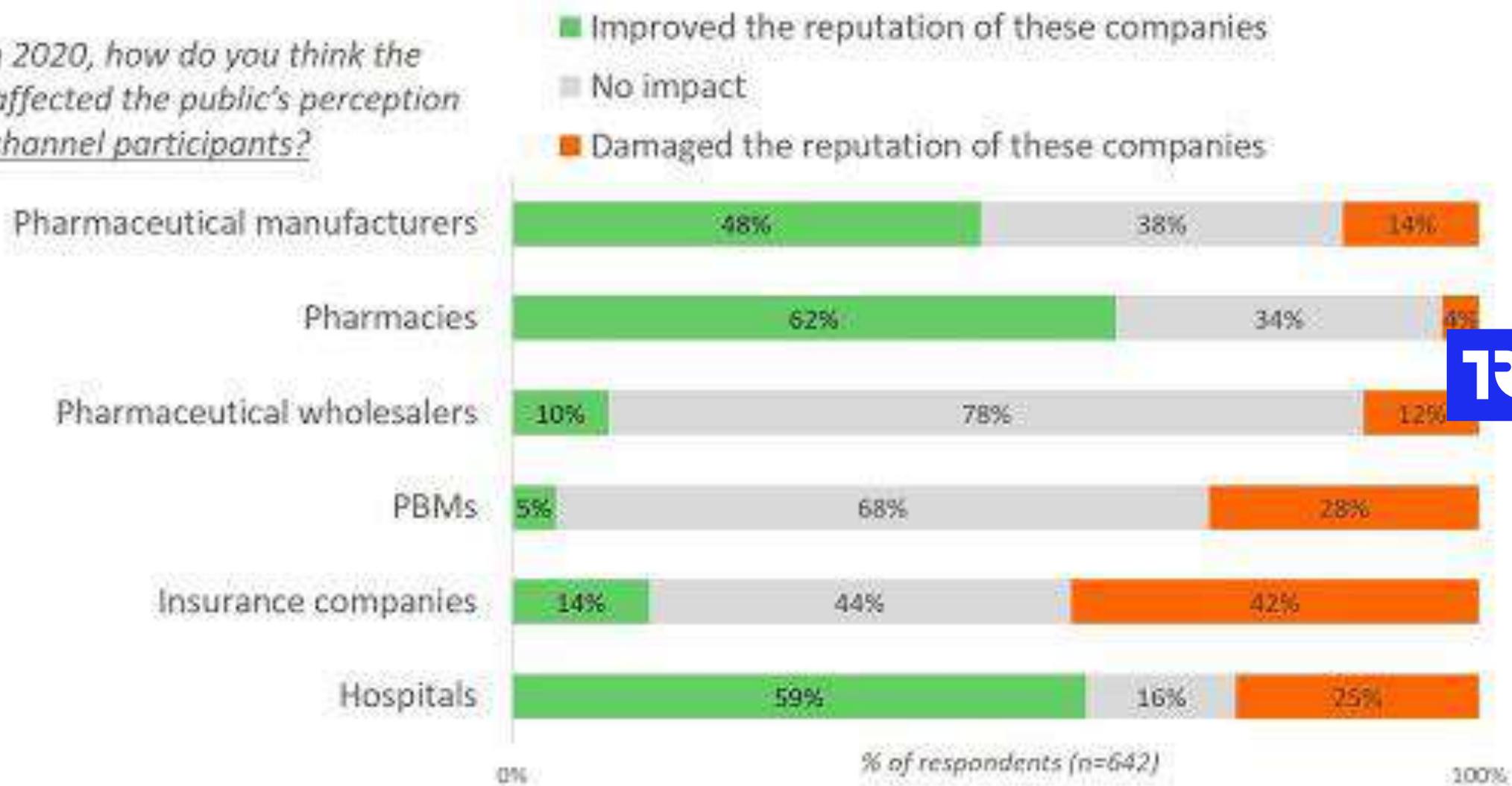
Increasing prescription profits for retail pharmacies

Source: Drug Channels Institute analysis of March 2020 survey results. Data exclude those who responded "unsure." Totals may not sum due to rounding.

Published on Drug Channels (www.DrugChannels.net) on March 24, 2020.

Drug Channels Coronavirus Industry Impact Survey: Public Perception

When we look back on 2020, how do you think the coronavirus will have affected the public's perception of the following drug channel participants?



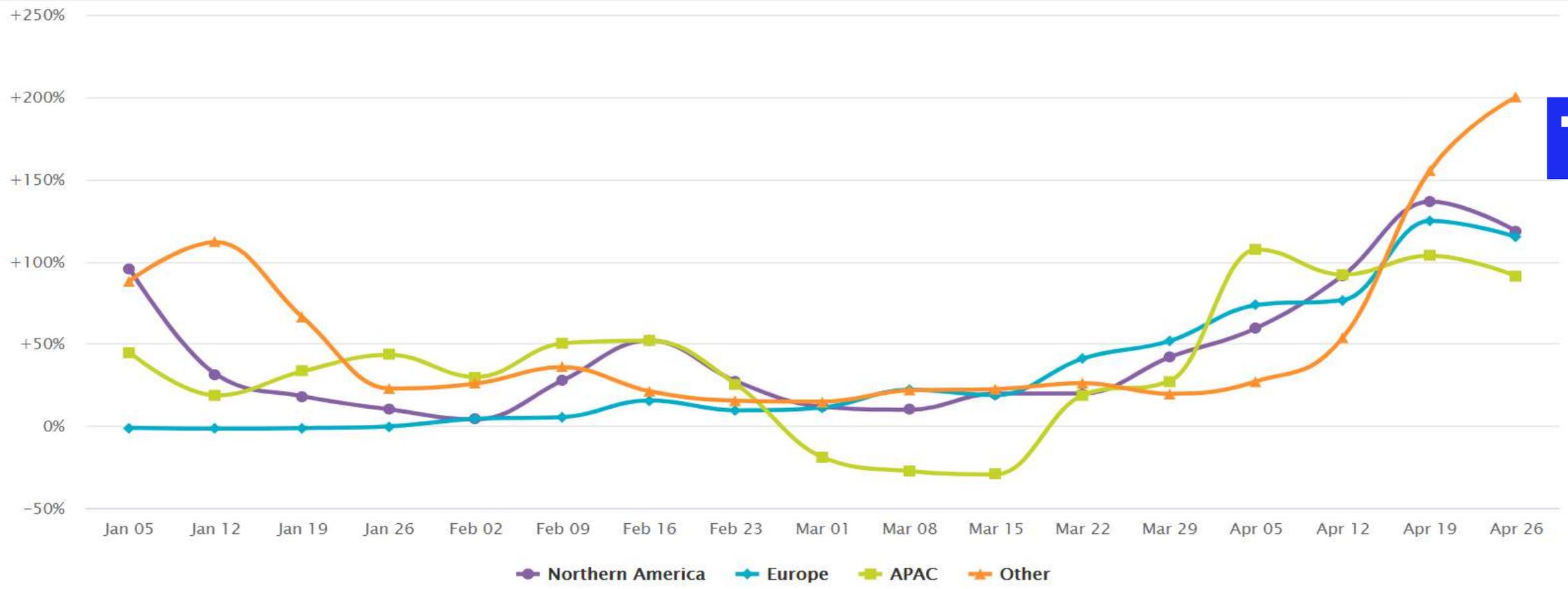
Source: Drug Channels Institute analysis of March 2020 survey results. Data exclude those who responded "unsure." Totals may not sum due to rounding.
Published on Drug Channels (www.DrugChannels.net) on March 26, 2020.

[REGIONAL TRENDS](#)[COUNTRIES TRENDS](#)

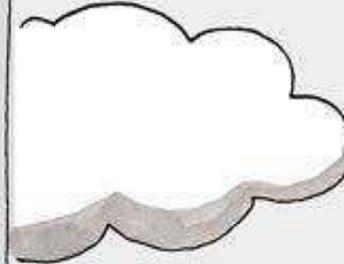
Sector ? Sub-sector ? Economic indicators ?

Retail (online activity) ▾ All ▾ Orders ▾

Last 14 days Since January



La transformación digital está a años luz de distancia, no veo que nuestra compañía tenga que implementar eso pronto

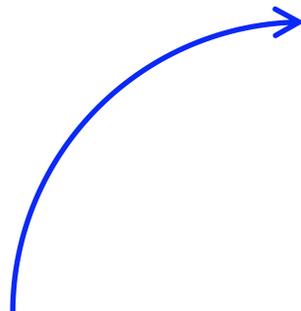


TOM
FISH
BURNE

Herramientas para pensar

¿Cómo abordar esta situación?

Dar espacio y tiempo para pensar cambios profundos



Proteger a los colaboradores

Gestionar y cuidar clientes

Gestionar y cuidar abastecimiento

Cuidar la caja

Foco en el presente

Equipo mirando el futuro

Análisis de escenarios económicos al retorno

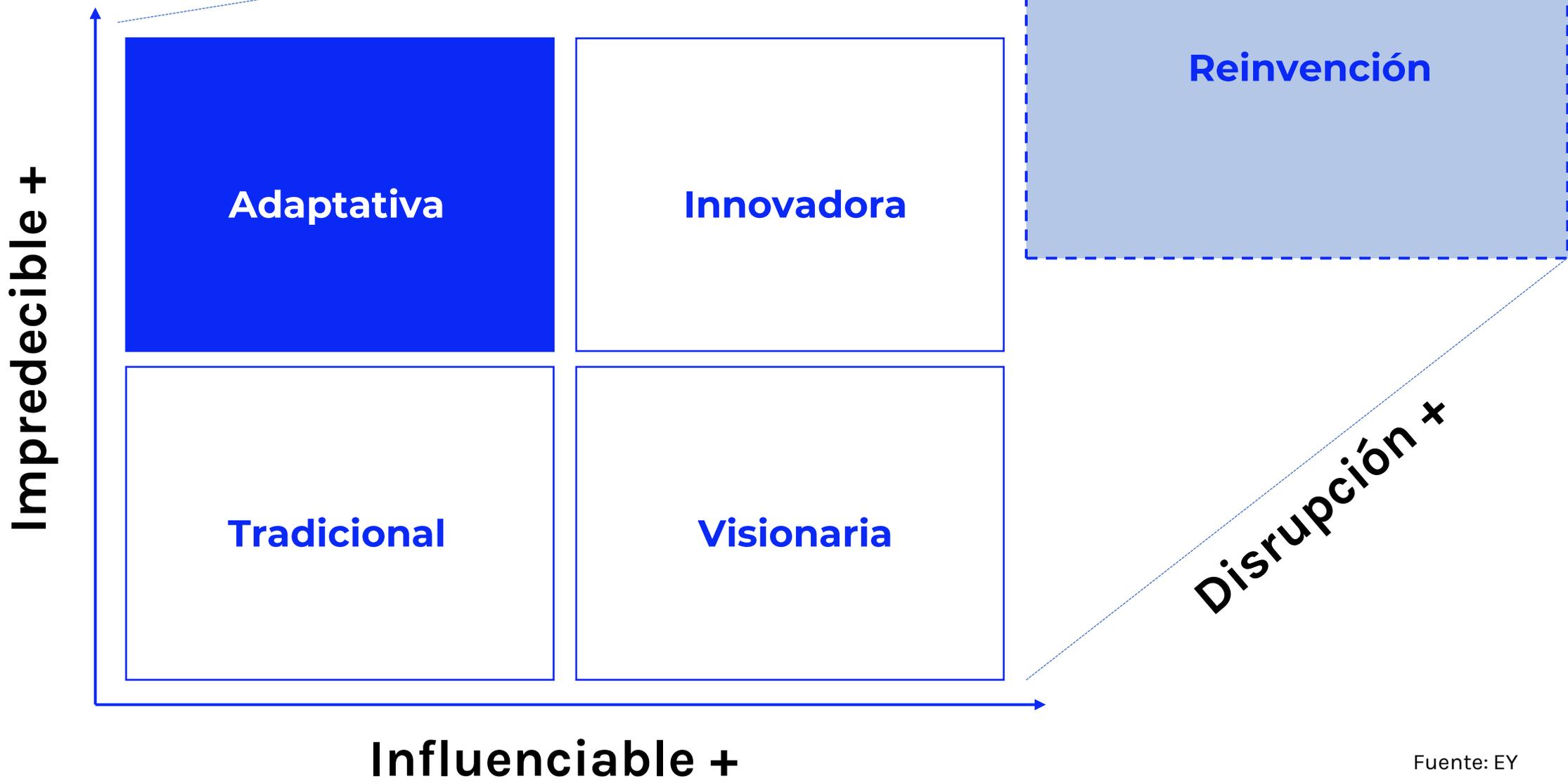
Idear y realizar cambios estructurales al negocio a mediano plazo para manejar la demanda futura y proteger los ingresos

Plan detallado para el retorno

Nueva estrategia para la “nueva normalidad” – Reimaginar & Reformar







Who to consider transitioning: Four categories of workforce for the immediate post-shelter-at-home environment



VIRTUAL/ REMOTE

Maintain remote work, while increasing flexibility

- Focus on remote support, productivity, connectivity, health
- Shift contracts where needed & possible towards flexible arrangements



ONSITE FLEXIBLE

Define plan for staged return based on local context

- Identify milestones for starting a safe return to work process (e.g., local public health system readiness, government return to work guidelines)
- Develop detailed plan for return to work based on key considerations: virus spread, guidance from public health authorities, workforce readiness to return to work, legal liability



ONSITE CRITICAL

Return to work with increased work flexibility

- Define plan for return to work, including staggered shifts and slower ramp-ups
- Re-train to move to more flexible skill sets
- Shift contracts where needed & towards flexible arrangements



OTHER

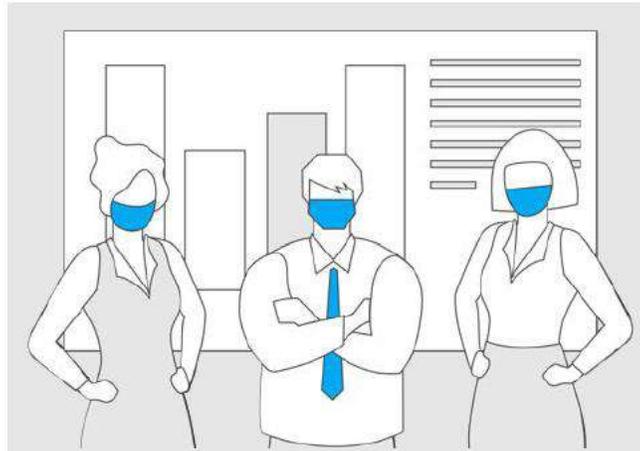
Transparency, reskilling, preserve company's future

- Provide transparency into reality of situation facing company
- Re-train or seek opportunities to shift focus
- Other actions to preserve future of company



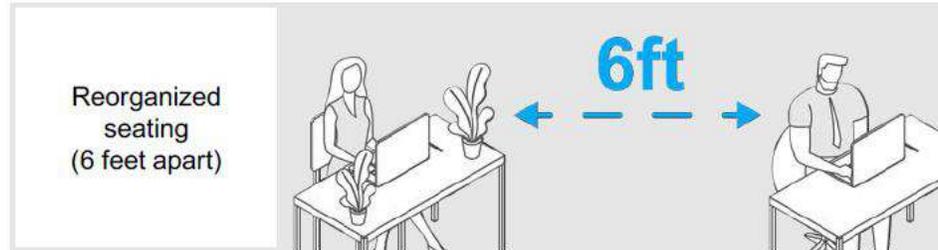
Sample journey: Office environment

Travel to work and pre-entry



Masks required and provided for employees

At Work

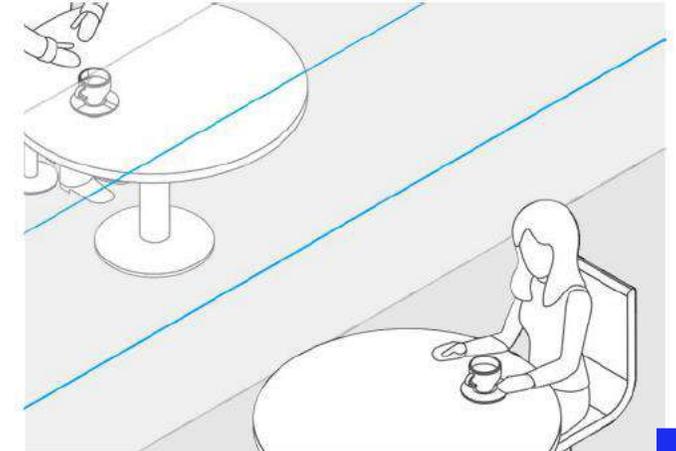


Reorganized seating
(6 feet apart)

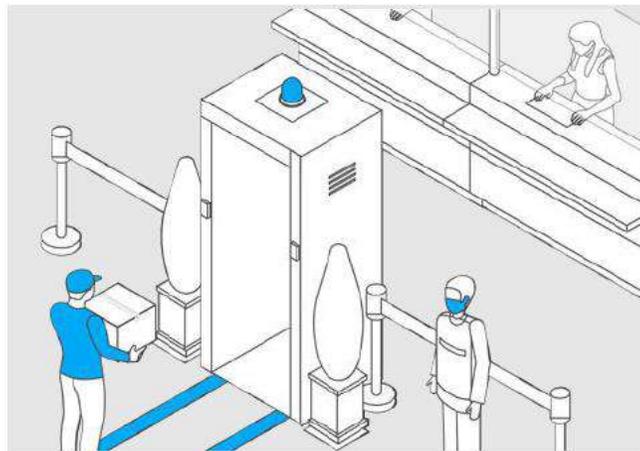


Headcount limited
below fire code limit
(e.g. limiting number
of entries by shifts)

Common space use



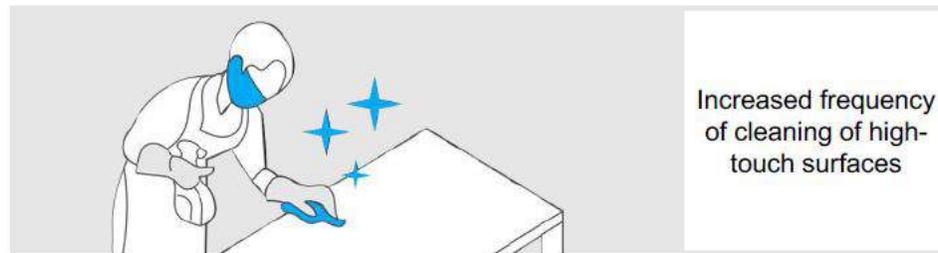
Separated lunch seating



Limited entrance for non-employees



Masks required at all
times (Except when
working individually
more than
6 feet apart)



Increased frequency
of cleaning of high-
touch surfaces

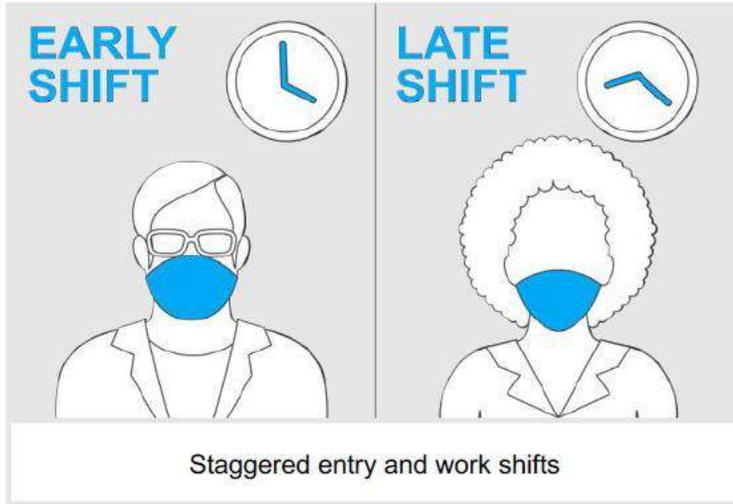


Increased frequency cleaning with visibly monitored
cleaning schedules



Sample journey: Retail environment

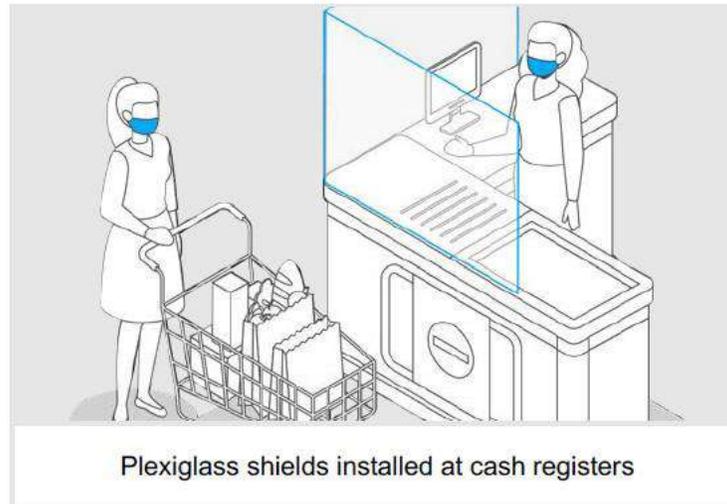
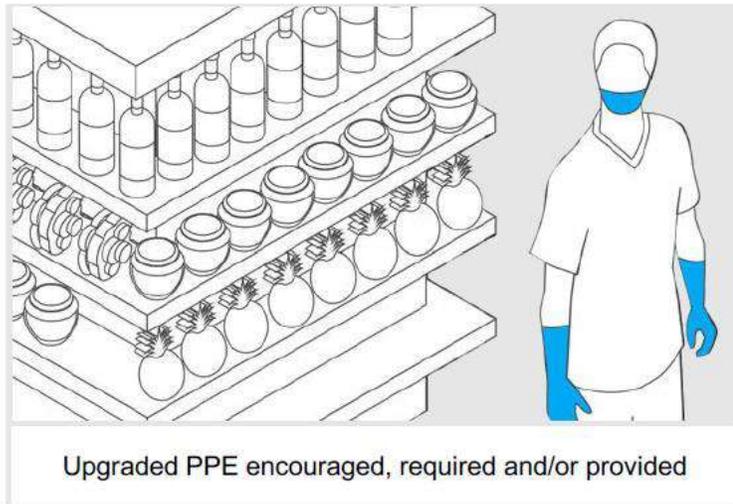
Travel to work and pre-entry



At Work



Common space use



¿Cómo va a Cambiar la Conducta del Consumidor luego del COVID-19?



Ideas para el negocio post Covid-19 en el retail farmacéutico

Algunos ejemplos para tener en cuenta...

Entrega sin contacto



TR



Online

Prescription Delivery, Expertly Handled



600%+
orders

90%+
hiring



TR



To request a prescription delivery, text **"DELIVER"** to **727478**

[Learn more about our response to COVID-19 →](#)



Telemedicina

Find Care online

Feeling sick? Consult with a health care provider online from the safety of your home >



Pharmacy Chat

Expert advice on medications for symptoms >



FREE Rx delivery

Get eligible Rx delivered to your door in 1-2 days via Walgreens Express >



FREE shipping

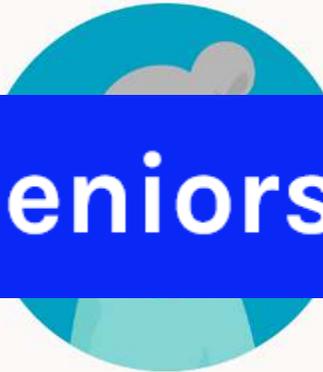
Shop online and get essentials shipped to your home free when you spend \$35+ >



Drive thru

Drive-thru shopping

Use the drive-thru to safely pick up Rx & select household essentials† >



Seniors

New services for seniors

Get extra support, from seniors-only shopping times to weekly discounts >



INICIO MEDICAMENTOS CÓMO FUNCIONA QUIÉNES SOMOS PREGUNTAS FRECUENTES INSCRÍBETE ▾

1 Busca tu medicamento en la página web

2 Sube tu receta y datos al portal

3 Despacho a tu farmacia cercana o tu domicilio

6x
venta
marzo

TR

Ultima milla



Tu farmacia más cercana

Buscar

Contacto info@farmex.cl



NEW

MEDICAMENTOS

COLÁGENO HIDROLIZADO

DISFUNCIÓN ERÉCTIL

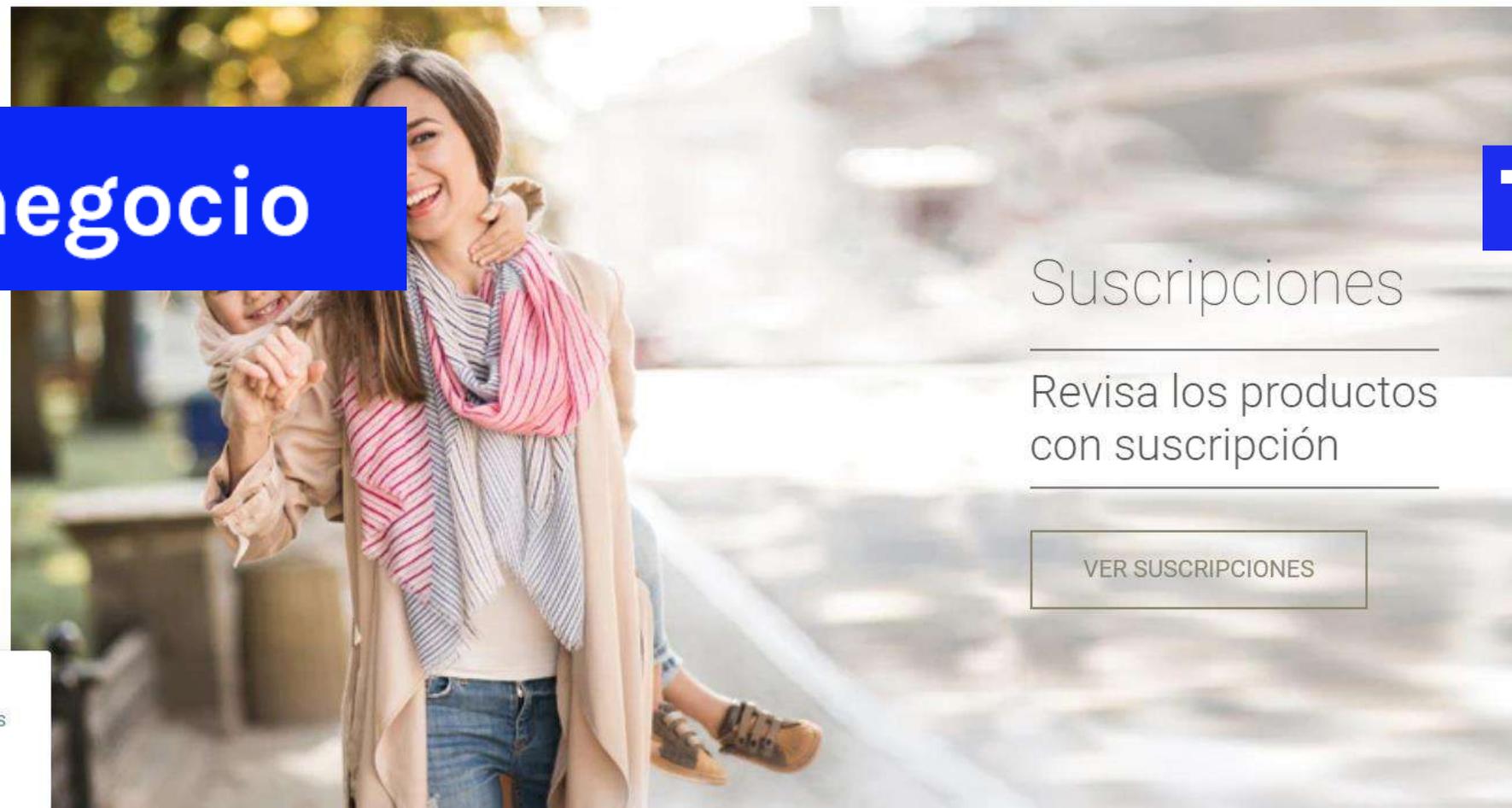
MASCARILLAS

SUSCRIPCIONES

BLOG

Modelo de negocio

TR



Suscripciones

Revisa los productos con suscripción

VER SUSCRIPCIONES



Jorge from Santiago, Santiago Recently bought Ripol 100 mg. x 5 Comprimidos Recubiertos! 3 hours ago Verified by Proof Factor

Nuevos servicios

PRESENCIAL

La medicina de excelencia en el lugar que necesitas.
Reserva una hora aquí

MÁS INFORMACIÓN AQUÍ

NUEVO CENTRO DE TELEMEDICINA

La medicina de excelencia en el lugar que necesitas.

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MÉDICOS A DOMICILIO

Nosotros vamos a tu casa.
Inscríbete aquí

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TR

Drones

DRON MULTIPROPÓSITO ENTREGA MEDICAMENTOS EN ZAPALLAR

NUEVOS CONTAGIOS 678

21:16

SANTIAGO

COVID-19
EMERGENCIA GLOBAL



Pago sin contacto

Local / barrio




Imagen Spa
Belleza responsable. salud y bienestar.



**Farmacias
Comunitarias**

FARMACIA

LO MEJOR DEL CINE
Acción, Dances, Comedia, terror, Drama, Romances, Fideos, Musicales, Pizarrón, P. Novelas

TR



Experiencia protegida

TR

AFP

Tiendas sólo delivery

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