

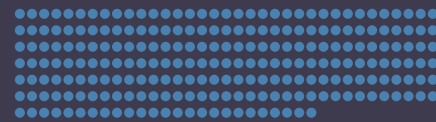
MEASURING THE MARKET

DAWN CONNELLY & MARTIN COTTERELL

LARGE MULTIPLES

There has been a net fall of 118 large multiple pharmacies. LloydsPharmacy has divested more than 200 pharmacies (after acquiring 281 Sainsbury's pharmacies in September 2016) and Rowlands Pharmacy is selling 70 stores. Boots has proposed axing head office jobs but made no mention of pharmacy closures.

Boots 2,350 ↓ 26



LloydsPharmacy 1,597 ↑ 21



Well 788 ↓ 27



Rowlands 516 ↓ 3



Tesco 377 ↓ 5



SMALL MULTIPLES

There has been a net increase of 92 small multiple pharmacies, with Jhoots acquiring the most among the 12 largest chains (by owner). A significant proportion of Norchem's increase is because sister companies were combined.

Jhoots 68 ↑ 45



H I Weldrick 63 ↑ 2



Dudley Taylor 60 ↑ 4



Waremoos 54 ↑ 2



Day Lewis 290 ↑ 20



Asda 256 ↑ 1



Cohens 225 ↑ 43



Superdrug 204 ↑ 1



Paydens 131 ↑ 24



Morrisons 118 ↓ 1



PCT Healthcare 115 ↑ 52

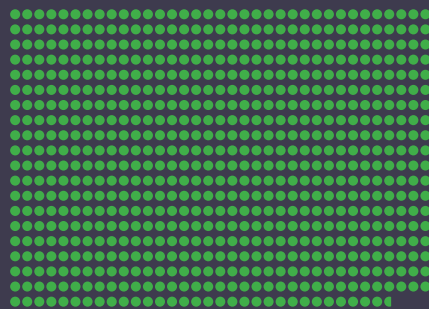


LARGE MULTIPLES

(>100 pharmacies)

Pharmacies: **6,967**

Market share: **49.4%** ↓ 0.6 PP

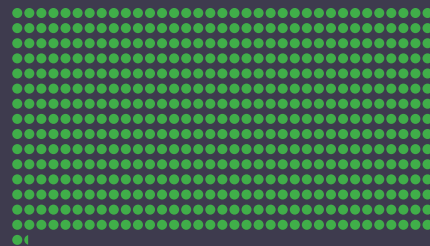


INDEPENDENTS

(1-5 pharmacies)

Pharmacies: **5,264**

Market share: **37.3%** ↓ 0.1 PP



2019

vs. 2016

Total market: **14,108*** ↓ 52

*Includes distance-selling pharmacies within each sector

● = 10 PHARMACIES

(PP = Percentage points)

SMALL MULTIPLES

(6-99 pharmacies)

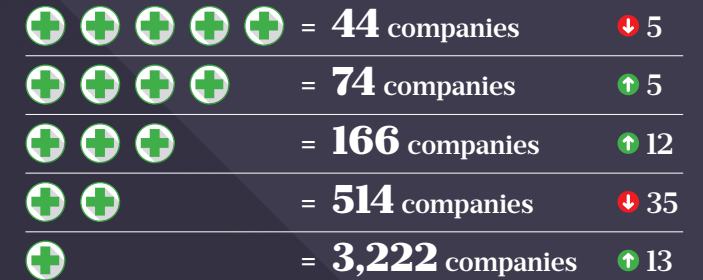
Pharmacies: **1,877**

Market share: **13.3%** ↑ 0.7 PP



INDEPENDENTS

There has been a net drop of 26 independent pharmacies. Most contractors still own a single pharmacy; there has been a slight increase in the number of contractors who own three or four pharmacies.



DISTANCE-SELLING PHARMACIES

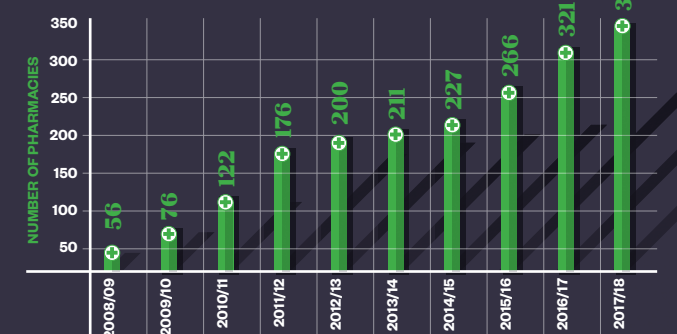
Market share: **2.5%**** ↑ 0.6 PP

**2017-2018 data (latest available)



DISTANCE-SELLING PHARMACIES

Exemptions to NHS market entry for distance-selling pharmacies were first introduced in England in 2005, resulting in a steady rise in numbers in the following years. Distance-selling NHS pharmacies are not permitted in Scotland and Wales.



Source: General Pharmaceutical Council register of premises March 2016 and January 2019 (excluding NHS trust-owned dispensaries); NHS Digital: General Pharmaceutical Services in England — 2007/2008 to 2017/2018.