



JULY 2019

# U.S. NATIONAL PHARMACY MARKET SUMMARY

*Market Insights Report*

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# NATIONAL PHARMACY MARKET SUMMARY

Tracking changes and trends in pharmacy growth, personnel, ownership, and many other data points has become essential for understanding the healthcare market at large. Increasingly, pharmacies are becoming a primary provider for their clients who visit them for annual flu shots, common colds or allergies, and even some ambulatory care. Working under the supervision of a physician, some pharmacists even provide an annual wellness exam.

## TRENDS

As of June 2019, Walgreens led the pharmacy market both in number of pharmacists and number of locations. CVS and Walmart are second and third in those rankings. The Top 5 pharmacy corporations own nearly 28,000 retail locations with Walgreens and CVS accounting for over 9,000 locations each. In fact, 90% of all pharmacy facilities are retail locations. Being the pharmacy close to and trusted by the customer is essential to growth.

The growth of these retail giants tells the story of pharmacy trends. Walgreens has recently expanded horizontally with pharmacy location acquisitions while CVS has grown vertically with its acquisition of Aetna. According to the latest analysis from DrugChannels.net, CVS has greater prescription revenue than either Walgreens or Walmart. These are only a few of the factors that aid in an understanding of the entire market and your specific customers.

## ONEKEY VALIDATION METHODOLOGY

To ensure the level of accuracy and compliance required to propel healthcare businesses forward, the OneKey database from IQVIA is derived from best-of-breed data collection methods and powerful integration processes including:

- Proactive telephone, web, and desktop research
- Billions of claims and transactional data linking, validating, and delivering insight

- Continual execution of automatic and manual processes that balance efficiency to ensure quality
- Daily processing, verification and validation of customer inquiries for efficient governance and stewardship
- Automatic import of trusted industry and government sources to ensure compliance

This blend of people, processes and technology enables us to deliver provider data that reflects the latest profile updates, regulatory changes, the impact of provider-organization relationships, and more.

OneKey also enables you to access IQVIA's sales, prescription, and claims data for deeper provider insights.

## HOW TO USE THIS REPORT

IQVIA creates our Market Insights Reports to give you essential data on a market in an easily understandable format. Use this to refresh your commercial team preparing to engage providers. Or review it to identify where your team may need to dive deeper.

When you're ready to go deeper, our OneKey database and variety of integrations make staying up-to-minute with provider and organization data as easy as logging in. With more than 9.7 million healthcare professionals, 2.4 million email addresses, and 709,000 healthcare organizations, OneKey connects your organization to a single reference data standard and helps you understand customer access, value and potential.

## TOP 25 PHARMACIES IN THE U.S.

RANK	COMPANY NAME	CITY	STATE	PHARMACISTS	STORES
1	Walgreens Company	Deerfield	IL	48,986	9,323
2	CVS Health	Woonsocket	RI	31,235	9,054
3	Walmart Stores Inc	Bentonville	AR	15,369	4,865
4	Rite Aid Corp	Camp Hill	PA	10,869	2,721
5	The Kroger Company	Cincinnati	OH	7,516	1,956
6	Albertsons Inc	Boise	ID	6,157	1,713
7	Amerisourcebergen Corporation	Chesterbrook	PA	4,852	1,961
8	Publix Super Markets Inc	Lakeland	FL	4,700	1,084
9	McKesson Corp	San Francisco	CA	4,524	1,556
10	Costco Wholesale Corp	Issaquah	WA	2,179	500
11	Cardinal Health Inc	Dublin	OH	1,382	518
12	Ahold Delhaize Usa	Carlisle	PA	1,380	521
13	H E Butt Grocery Company	San Antonio	TX	1,310	270
14	Meijer Great Lakes Limited Partnership	Grand Rapids	MI	1,080	238
15	Southeastern Grocers LLC	Jacksonville	FL	1,059	327
16	Hy Vee Inc	West Des Moines	IA	1,006	249
17	Sears Holdings Corp	Hoffman Estates	IL	945	306
18	Kaiser Permanente	Oakland	CA	892	131
19	Freds Inc	Memphis	TN	778	301
20	Pharmerica Corp	Louisville	KY	614	89
21	Giant Eagle Inc	Pittsburgh	PA	594	204
22	Shopko Stores Operating Company LLC	Green Bay	WI	574	206
23	Ahold Delhaize America	Salisbury	NC	484	170
24	Wegmans Food Markets Inc	Rochester	NY	479	88
25	Kinney Drugs Inc	Gouverneur	NY	437	113

Source: IQVIA's OneKey healthcare provider reference database. Last update: 7/1/2019.

# PHARMACIES BY TYPE

## PHARMACY BY OWNERSHIP

OWNERSHIP	PHARMACY TOTAL
Independent	39,985
Chain Stores	48,196
<b>Total</b>	<b>88,181</b>

## PHARMACY BY FACILITY TYPE

FACILITY TYPE	PHARMACY TOTAL
Central Fill	43
Closed-Door	4,347
Compounding	768
Internet	52
Mail Service	621
Nuclear	435
Outpatient Pharmacy	1,858
Retail Pharmacy	80,057
<b>Total</b>	<b>88,181</b>

## BY NUMBER OF PHARMACISTS

PHARMACISTS AT LOCATION	PHARMACY TOTAL
1	13,883
2	13,317
3	10,820
4	7,463
5	4,666
6	3,003
7	1,849
8	1,244
9	762
10	510
11-15	954
16-20	203
21-25	70
26+	93
N/A	29,344
<b>Total</b>	<b>88,181</b>

## STATES WITH MOST PHARMACIES IN THE U.S.

STATE	NUMBER OF PHARMACIES
CA	8,015
TX	7,059
FL	6,599
NY	6,584
PA	4,047
MI	3,289
IL	3,068
OH	2,873
GA	2,785
NJ	2,774
NC	2,685
VA	2,056
TN	1,993
AL	1,845
MO	1,662
LA	1,652
MD	1,598
WA	1,560
PR	1,509
IN	1,492
MA	1,476
KY	1,453
AZ	1,404
MN	1,390
WI	1,384
SC	1,384
OK	1,165
CO	1,095
MS	1,076
AR	1,016
IA	968
CT	929
OR	879
KS	828
WV	678
UT	663
NE	642
NV	640
NM	423
ID	395
ME	370
MT	351
HI	320
NH	316
SD	269
DE	247
RI	242
ND	239
VT	196
DC	193
WY	170
AK	146
GU	44
VI	39
MP	6
<b>Grand Total</b>	<b>88,181</b>

*OneKey connects your organization to a single reference data standard and helps you understand customer access, value and potential.*



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