LaingBuisson

RETAIL PHARMACY
UK MARKET REPORT

FIRST EDITION

COVERING:

REGULATION

MARKET ECONOMICS

DEMAND & SUPPLY

GOVERNMENT POLICY

CORPORATE PROFILES

FUTURE OF PHARMACIES

The healthcare experts

RETAIL PHARMACY
UK MARKET REPORT
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At the start of 2015 we enter an election year, the NHS is enduring another winter of crisis, GP and A&E frameworks are stretched to bursting and the issue of healthcare funding looks like a football that has been kicked around once too often by various political parties and interests. Dramatic changes to the NHS are still bedding down, particularly in relation to commissioning of services, not least from community pharmacies. Policy towards the role of pharmacy is the subject of debate, from outside, and within the sector where there are finally stirrings of a unification of voice in relation to pursuing industry wide objectives. This is the landscape that community pharmacy currently inhabits in a plethora of retail guises.

The first edition of this exclusive LaingBuisson report covers a wide range of industry issues, providing a benchmark of information for anyone interested in the pharmacy sector.

Public sector funding and regulation dominate the sector, and the report looks at both economic and regulatory structure, as well as considering what is happening in practice. The report provides detailed analysis of the current market, considering demand, revenue and ownership. It considers market share, the property market, growth, and provides in-depth financial analysis of over 35 of the leading corporate multiples.

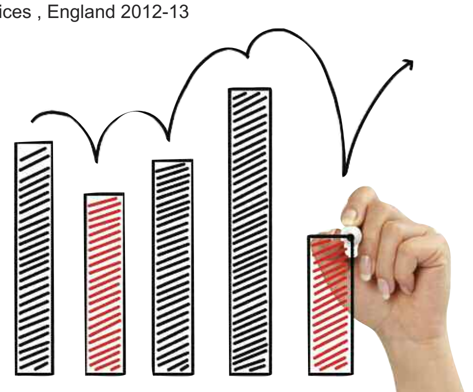
The development of government policy, both in relation to the NHS, and in regard to market entry control, is examined, incorporating industry opinion and comment.

Finally the report looks at issues affecting the future of the community pharmacy sector. It examines its potential role within the NHS, looks at commissioning in transition, considers new channels to market and new technology, and the increase in competition within the sector. It also gives insight into the pharmacy workforce, the relationship with General Practice, and evaluates the latest sector attempts to develop a 'manifesto' and find a unified voice.

The report is an invaluable guide and source of information for anyone with an interest in the sector, be they owners, pharmacists, investors, policy makers, commissioners, or educational establishments training those looking to be pharmacists of the future.

Exclusive Tables & Figures include...

- Number of pharmacies per head of population UK
- Pharmacy ownership by large multiple (20-99 pharmacies)
- Pharmacy ownership by small multiple (6-19 pharmacies)
- Independent pharmacy owners by size, number of pharmacies and market share
- Number of 100-hour pharmacies in England 2008-9 to 2012-13
- Number and % of registered community pharmacies by country in the UK
- Number of pharmacies by size of owner
- Major multiple ownership by number of pharmacies and market share
- Penetration of pharmacy outlets into supermarket chains
- Number of community pharmacies England 2004-5 to 2013-14
- English pharmacy market % increase in pharmacy numbers year on year 2005-6 to 2013-14
- Community pharmacies opening and closing, England, 2006-07 to 2013-14
- Pharmacy workforce gender and age statistics
- Key Financials for leading multiples
- Major multiples EBITDA as % of revenue 2010 to 2013/14
- Secondary multiples EBITDA as % of revenue 2010 to 2013/14
- Number and percentage of "exempt category" Distance Selling pharmacies, England, 2008-09(1) to 2013-14
- Prescriptions per head of population England 2003-2013
- Indicative monthly income from Essential services October 2014 - England
- Income expectation from essential services payments for pharmacy fulfilling 3,060, 5000 and 8,000 items per month
- Number of prescription items dispensed (millions), dispensing fees received and average fees received per pharmacy by year as at 31st March - England
- Community pharmacies on the pharmaceutical list, average prescriptions items dispensed per month per pharmacy, England 2006-07 to 2013-14
- Number of community pharmacies on the pharmaceutical list, number & percentage of prescription items dispensed by monthly dispensing volume bands, England 2006-07 to 2013-14
- Percentage of community pharmacies providing MUR services in ENGLAND
- Average MURs per community pharmacy in England
- Community pharmacies on the pharmaceutical list, number and percentage providing New Medicines Services , England 2012-13 to 2013-14



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What does RETAIL PHARMACY UK MARKET REPORT offer you?

Executive Summary & Highlights

Market Regulation & Control
+ Historical background
+ Registration
+ Ownership
+ Market entry

Market Economics
+ Overview
+ Economic structure

The Current Market
+ Demand for pharmacy services
+ Revenue streams
+ Supply in the market
+ Ownership
+ Growth in the market

Government Policy & Sector Development
+ The historical background
+ The new millennium
+ Coalition policy
+ Labour party policy
+ Local authority policy making and commissioning
+ Scottish policy
+ Welsh policy
+ Northern Ireland policy

The Corporate Players
+ Profitability
+ Profiles of the key multiple pharmacy groups

Issues Affecting the Future of Community Pharmacy
+ Pharmacy as part of the NHS
+ 2015 Community Pharmacy Manifesto – developing a unified voice
+ Increased competition
+ Technology and new channels to market
+ Commissioning in transition
+ The relationship between community pharmacy and GPs
+ The Pharmacy workforce

Financial Appendix
+ Detailed analysis of the statutory accounts of major providers

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Get access to the top decision makers at leading high street pharmacy groups

An excellent companion to this report is LaingBuisson's latest data set on UK Retail Pharmacy which includes over information on almost 160 groups (each with five or more operating pharmacy branches) with the contact details of 400 individuals.

Data fields include: Org ID, Group Name, Contact Name, Contact Title, Contact First Name, Contact Surname, Contact Salutation, Contact Job Title, Address 1, Address 2, Town, County, Postcode, Telephone Number, Email, Website, Sector Code, Sector, Region Code, Region, Registration Number, Category Code, Category

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In addition to Market Reports, LaingBuisson publishes business newsletters and holds a number of well-attended annual conferences and Forum events which bring together delegates from every area of health and social care across the private, public and voluntary sectors.

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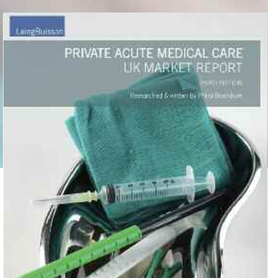

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