



November 2021

U.S. National Pharmacy Market Summary 2021

Market Insights Report

Introduction

Tracking changes and trends in pharmacy growth, personnel, ownership, and many other data points have become essential for understanding the healthcare market at large. Pharmacies have adapted their businesses in response to the pandemic by supplying COVID-19 testing and vaccines.

TRENDS

Like all healthcare segments, pharmacies have been impacted by COVID-19. According to IQVIA data on weekly mail order prescriptions during the summer of 2020, there was an average increase of 6.5% over the same period in 2019 as consumers embraced mail order. Mail order prescriptions had been on the decline until the COVID-19 pandemic reversed the trend.

Beginning in April 2020, IQVIA's National Health Care Utilization Project showed that elective procedures nearly ceased. Between March 6, 2020 and May 29, 2020, the use of prescription drugs was down 34%, pharmaceutical usage was down 41% for acute therapies, and 23% for chronic therapies. The dramatic fall in the amount of people starting therapies or adding drugs to their regimens negatively impacted prescription sales throughout the United States.

PHARMACY COUNTS

As of August 2021, Walgreens led the pharmacy market in number of pharmacists, however, CVS led by number of locations. CVS placed second in the number of pharmacists while Walgreens place second in the number of pharmacies. Walmart placed 3rd in both the number of pharmacists and the number of pharmacies. The top five pharmacy corporations own over 29,000 retail locations with CVS and Walgreens accounting for over 10,000 and 9,000 locations respectively. In fact, 88% of all pharmacy facilities are retail locations.

Top 25 pharmacies in the U.S.

RANK	COMPANY NAME	PHARMACISTS	STORES
1	Walgreens Company	49,614	9,012
2	CVS Health	41,022	10,179
3	Walmart Stores, Inc	19,105	5,185
4	Rite Aid Corp	10,394	2,432
5	The Kroger Company	8,558	2,246
6	Amerisourcebergen Corporation	5,913	2,252
7	Publix Super Markets, Inc	5,219	1,200
8	Albertsons Companies, Inc	4,944	1,705
9	McKesson Corp	4,202	1,612
10	H E B Texas Grocery	2,150	284
11	Costco Wholesale Corp	2,098	547
12	Ahold Delhaize, Usa	1,567	537
13	Cardinal Health, Inc	1,240	495
14	Hy Vee, Inc	1,063	296
15	Meijer Great Lakes Limited Partnership	935	261
16	Southeastern Grocers, LLC	801	231
17	Cigna Healthcare	697	49
18	Genoa Healthcare	652	601
19	Pharmerica Corp	635	107
20	Giant Eagle, Inc	607	215
21	Ahold Delhaize America	548	188
22	Wegmans Food Markets, Inc	457	97
23	Bartell Drugs	457	69
24	Shoprite Supermarkets, Inc	382	146
25	Kinney Drugs, Inc	375	100

Pharmacies by Type

PHARMACY BY OWNERSHIP

OWNERSHIP	PHARMACY TOTAL
Independent	19,119
Not independent	46,964
TOTAL	66,083

PHARMACY BY FACILITY TYPE

FACILITY TYPE	PHARMACY TOTAL
Alternate dispensing site	1,891
Central fill	55
Closed-door	3,090
Compounding	854
Mail service	512
Nuclear	286
Retail pharmacy	59,395
TOTAL	66,083

BY NUMBER OF PHARMACISTS

PHARMACISTS AT LOCATION	PHARMACY TOTAL
1	12,086
2	12,159
3	10,555
4	8,296
5	5,826
6	3,959
7	2,619
8	1,794
9	1,175
10	772
11-15	1,565
16-20	375
21-25	121
26+	150
N/A	4,631
TOTAL	66,083

States with the Most Pharmacies in the US

STATE	NUMBER OF PHARMACIES
CA	6,081
TX	5,404
NY	4,873
FL	4,860
PA	2,925
MI	2,400
OH	2,351
IL	2,167
GA	2,156
NC	2,064
NJ	2,063
VA	1,538
TN	1,517
AL	1,326
MO	1,257
WA	1,221
AZ	1,195
MD	1,192
LA	1,170
IN	1,168
MA	1,140
KY	1,132
WI	1,068
SC	1,050
PR	1,030
MN	946
CO	859
OK	859
AR	738
MS	703
IA	688
CT	678
OR	671
KS	637
WV	522
UT	500
NV	479

NE	437
NM	325
ID	313
ME	298
NH	267
MT	247
HI	219
DE	207
SD	197
ND	191
RI	180
DC	161
VT	135
WY	116
AK	111
GU	22
VI	20
MP	7
FM	1
AS	1
TOTAL	66,083

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

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
- Millions of claims and transactional data linking, validating, or delivering insights
- 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's Market Insights Reports provide you with essential data on a market in an easily understandable format. Use this to refresh your commercial team preparing to engage with providers or review it to identify where your team may need to dive deeper.

When you're ready to go deeper, the OneKey database makes access to up-to-minute provider and organization data as easy as logging in. With more than 11 million healthcare professionals, 3.1 million email addresses, and 717,000 healthcare organizations, OneKey connects your organization to a single reference data standard and helps you understand customer access, value, and potential.



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