

White Paper

# Pharmacy e-Commerce Handbook: Czech Republic and Slovakia

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# Introduction

In the closing of our first e-Commerce white paper “[Deep Dive into Pharmacy e-Commerce: Czech Republic and Slovakia](#)”, we stated that the growth rate of Czech and Slovak pharmacy e-Commerce would largely depend on how the Covid-19 pandemic unfolds. Given the development of the pandemic and subsequent growth of the e-Pharmacy channel, we think it is now the right time to take a look at the evolution of the e-Pharmacy channel in great detail again.

We are truly excited to share this data-based report to help you navigate the recent pharmacy e-Commerce changes and be prepared for the future.

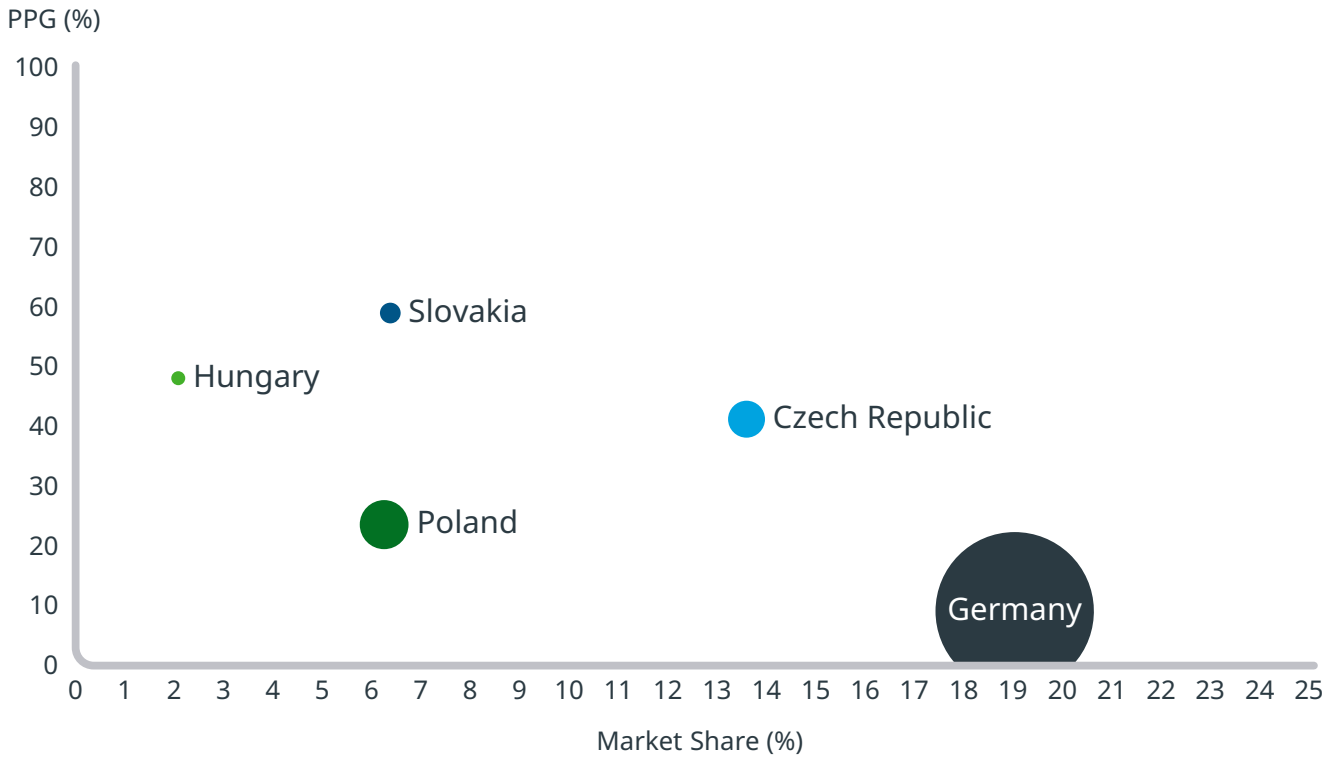
## 6 key executive trends

- #1 Czech Republic e-Pharmacy's Consumer Health market share reached 13.4% as of MAT 06/2021, valued at CZK 3.6 billion.
- #2 Slovak e-Pharmacy's Consumer Health market share reached 6% as of MAT 06/2021, valued at EUR 45 million.
- #3 IPO of Piluka.cz on the Prague Stock Exchange highlights the importance of e-Commerce channel.
- #4 Long-term growth trend has continued to be boosted by the COVID-19 pandemic.
- #5 e-Pharmacy as a channel continues to grow its presence to a broader scope of consumers beyond innovators and early adopters to early majority with key customer age range between 20 – 60 years.
- #6 New initiatives such as e-consultations, e-books and a plethora of other digital resources and innovations available to consumers continue to attract new customers and incentivize repeat purchase.

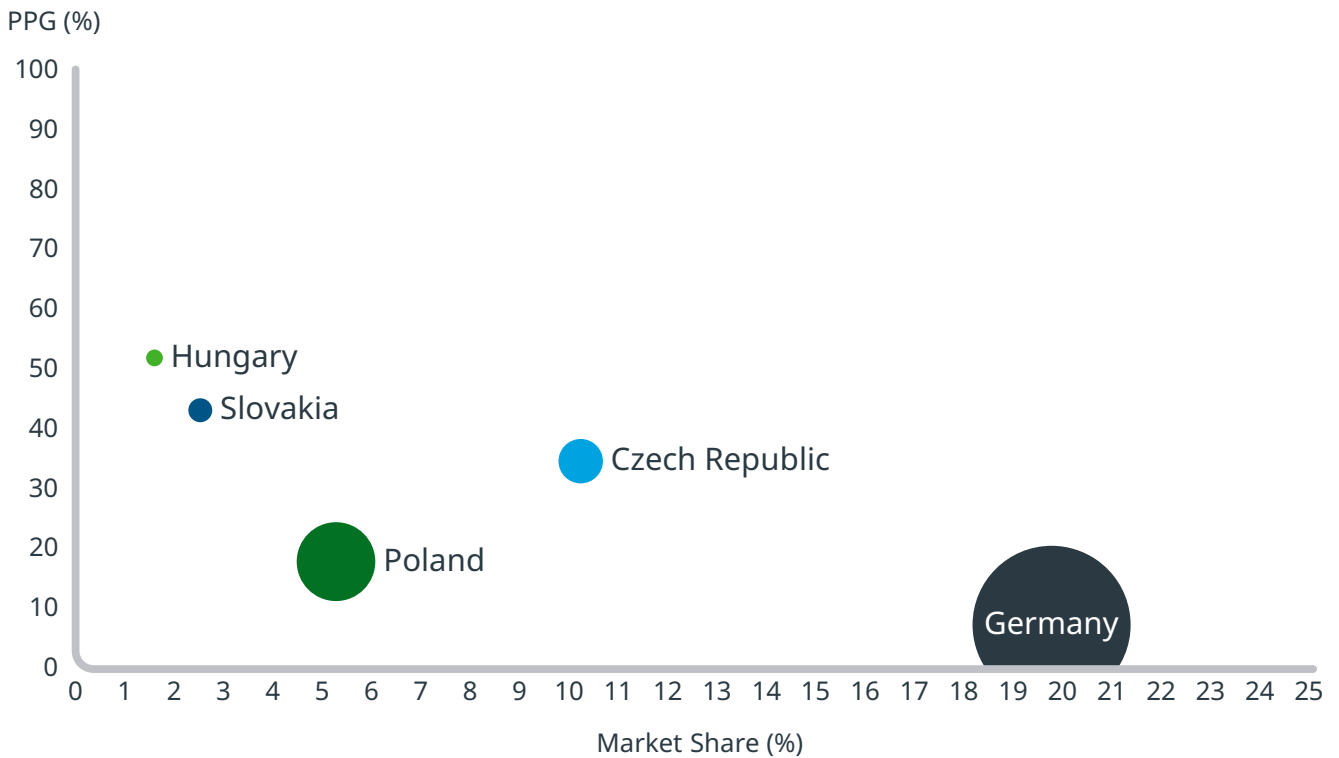


# e-Pharmacy market comparison for selected EU countries

Market share by value [EUR, MAT 06/2021]



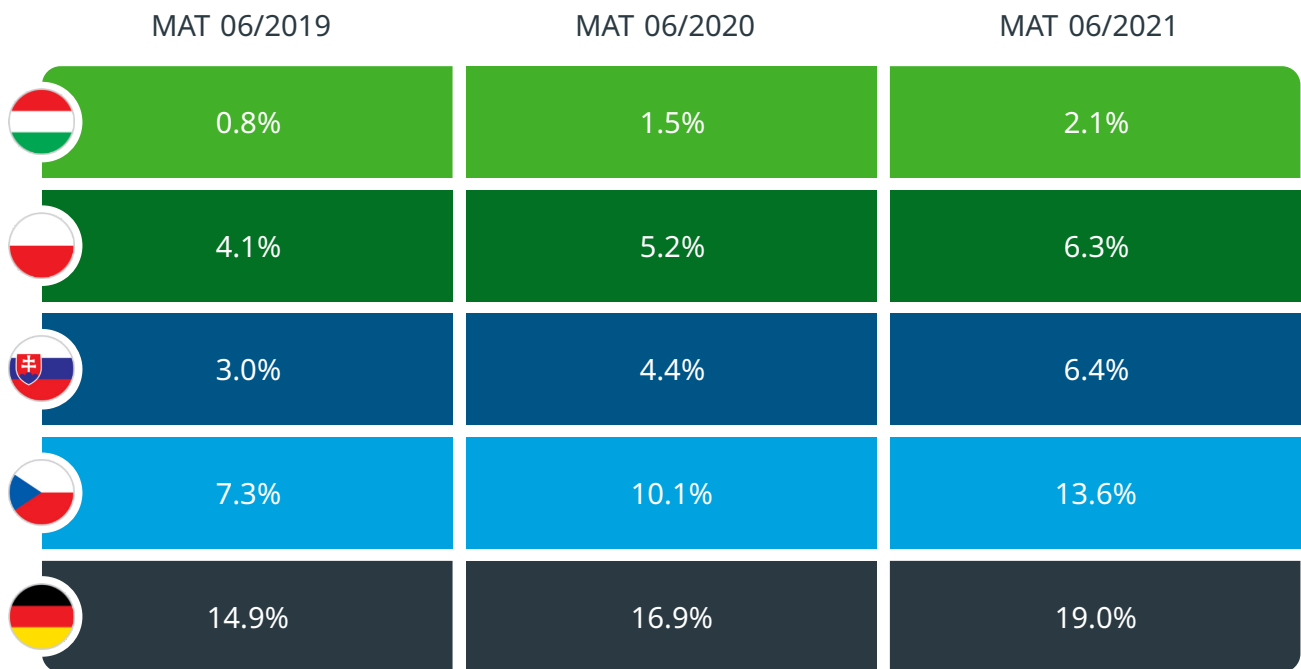
Market share by volume [units, MAT 06/2021]



Source: IQVIA Pharmatrend CZ, SK, GER, POL, HUN, 2021

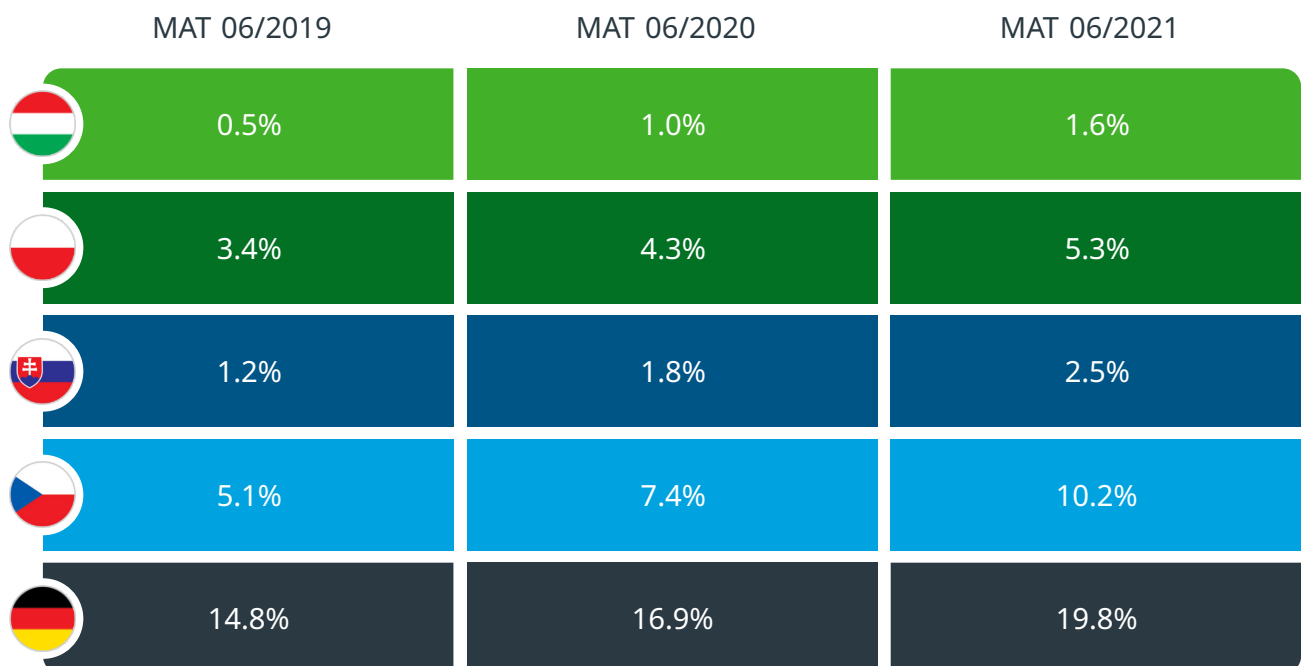
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## Market share by value



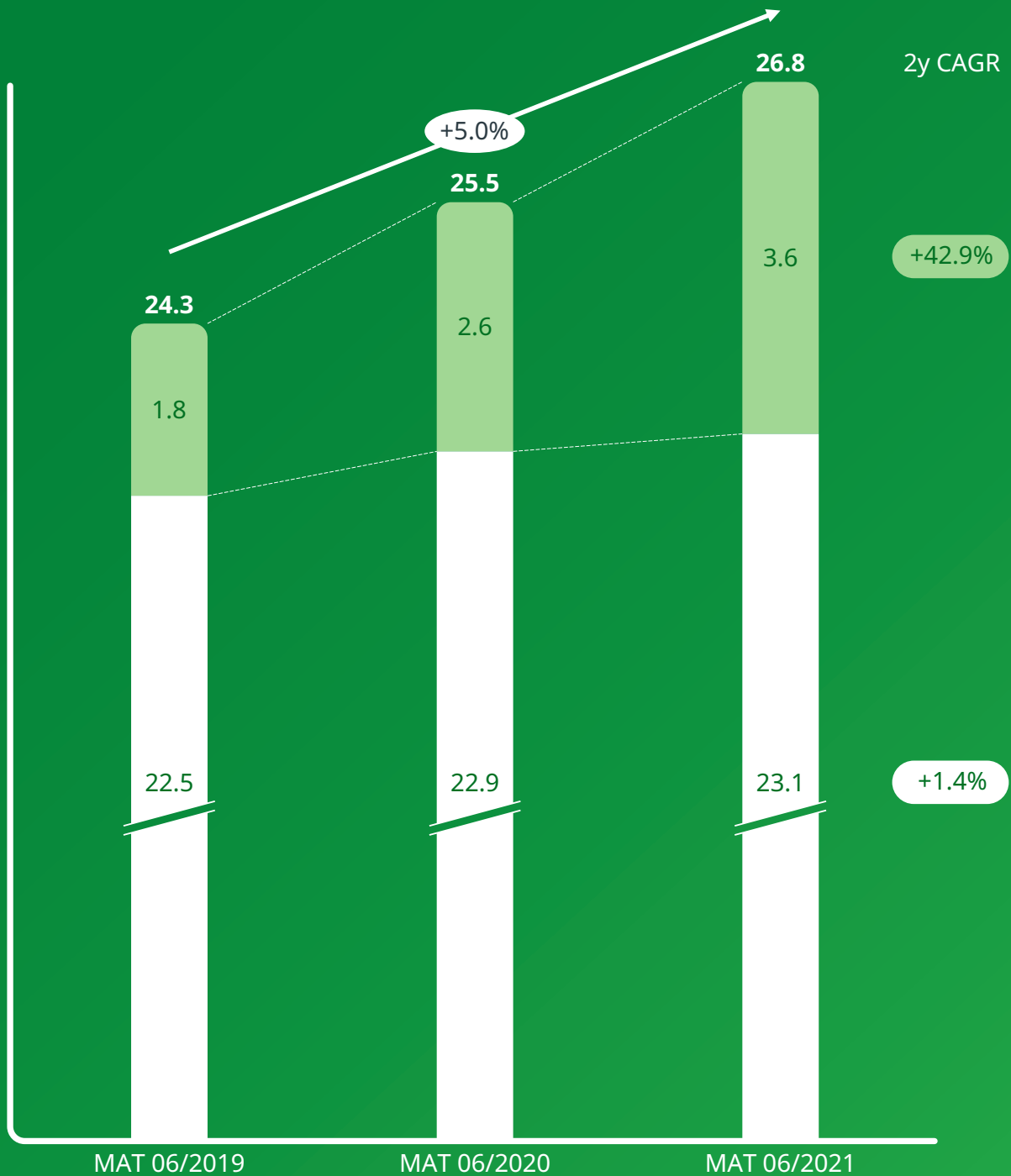
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## Market share by volume



# e-Pharmacy market share on Czech Consumer Health market

Total Czech Consumer Health market value - split by channel [CZK bn, MAT 06/2019-2021]

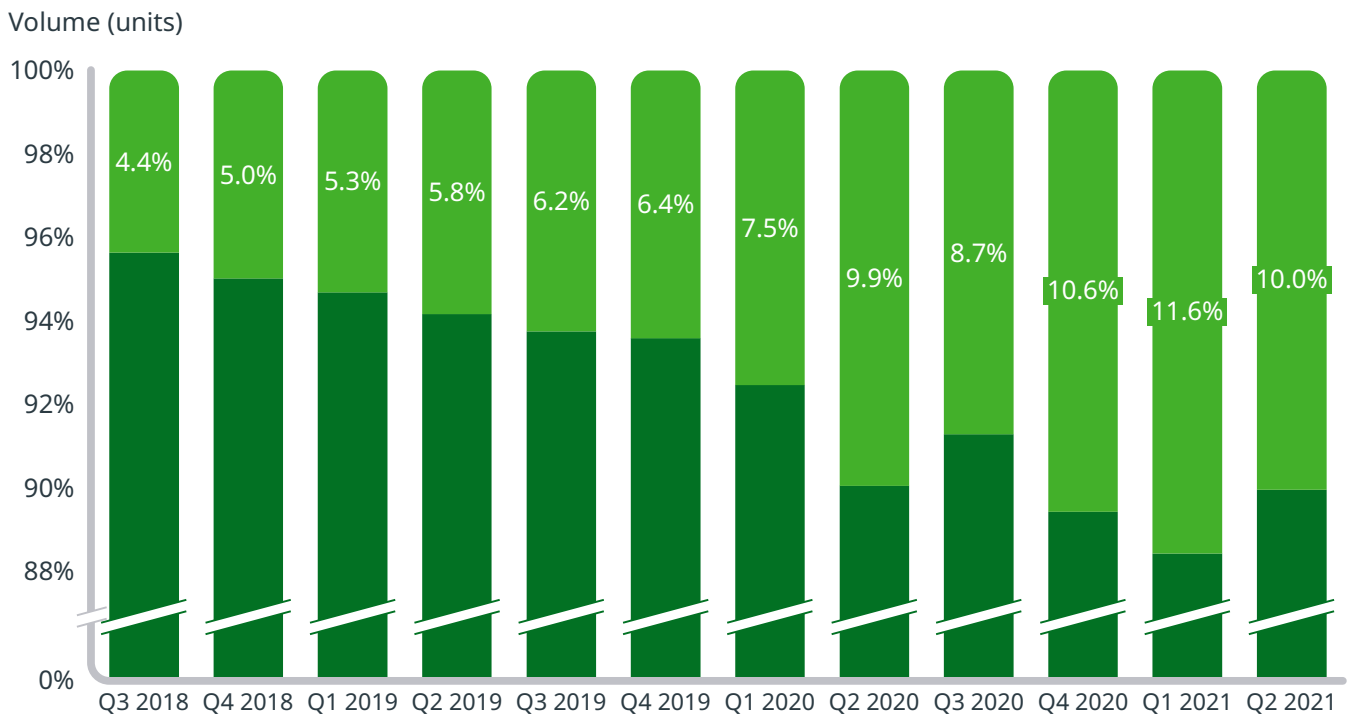
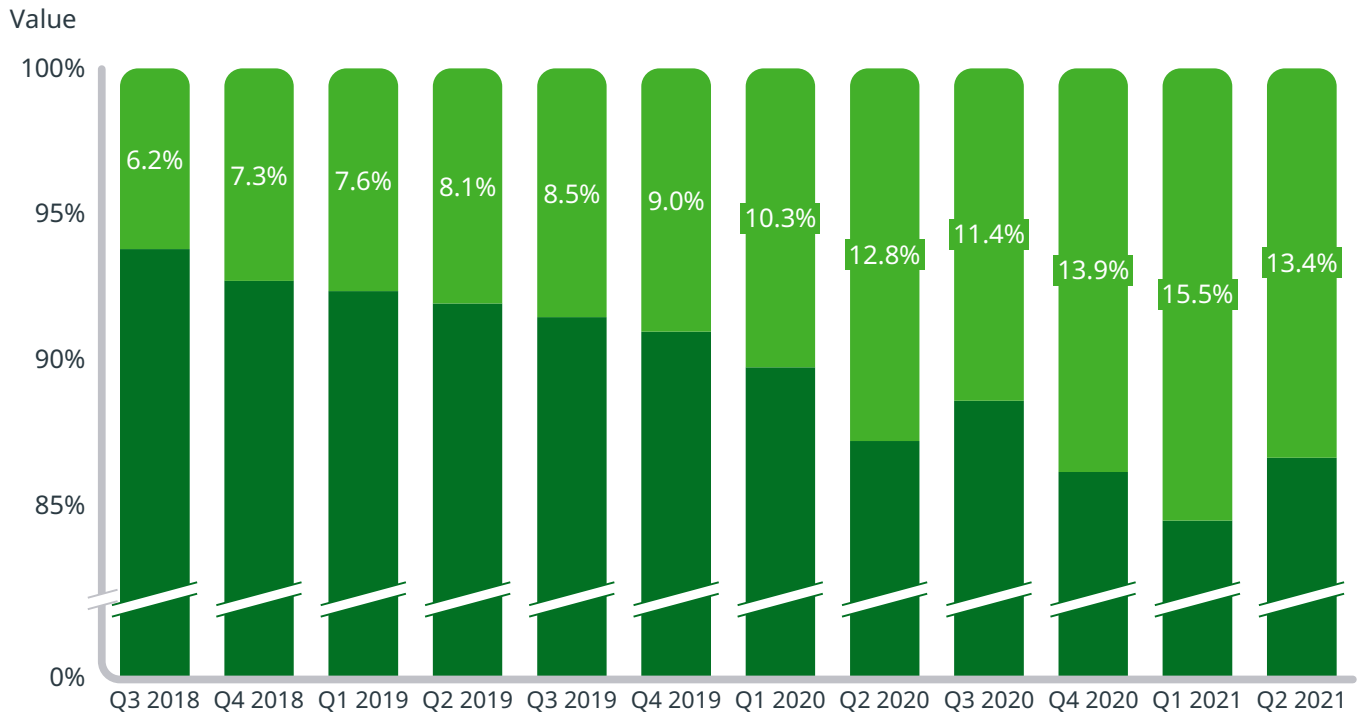


■ e-Commerce ■ Street Pharmacy

Source: IQVIA Pharmatrend, CZ, 2021

# Czech Republic e-Pharmacy landscape

Market share split e-Commerce vs. traditional pharmacies [Q3 2018 – Q2 2021]



■ e-Pharmacy 
 ■ Street Pharmacy

Source: IQVIA Pharmatrend, CZ, 2021

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**e-Commerce development over past 3 years in value [CZK mil, week 28/2019 – 28/2021]**



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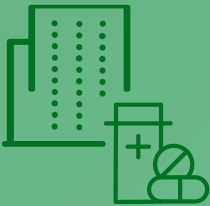
**e-Commerce development over past 3 years in volume [units ths, week 28/2019 – 28/2021]**



Source: IQVIA Pharmatrend, CZ, 2021



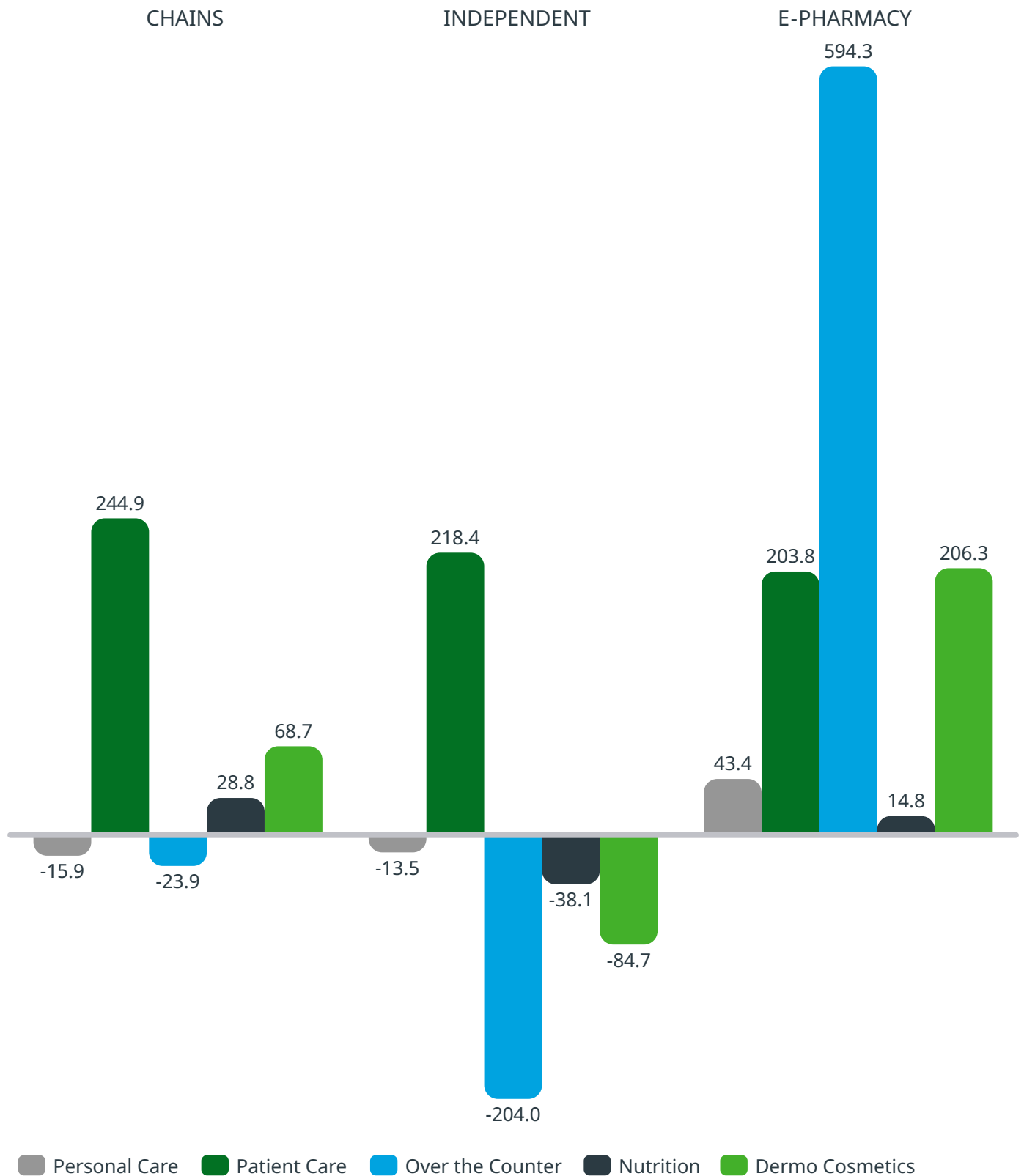
e-Pharmacy landscape in the Czech Republic [MAT 06/2021]

<p><b>Top e-Pharmacies in alphabetical order</b> (all in IQVIA e-Pharmacy CZ panel)</p> <p><i>Apotek</i></p> <p><i>Benu</i></p> <p><i>Dr.Max</i></p> <p><i>Lekarna.cz</i></p> <p><i>Pilulka.cz</i></p> 		<p>e-Pharmacy market value (CZK bln)</p> <p><b>3.64</b></p>	<p>e-Pharmacy market PPG growth (value)</p> <p><b>41.2%</b></p>	<p>e-Pharmacy market share in total CH (value)</p> <p><b>13.6%</b></p>
<p>Pharmacies</p> <p><b>2,682</b></p>	<p>Active e-Pharmacies</p> <p><b>138</b></p>	<p>IQVIA e-Pharmacy market value represented by TOP5 e-Pharmacies</p> <p><b>80%</b></p>	<p>e-Pharmacy market PPG growth (volume)</p> <p><b>34.5%</b></p>	<p>e-Pharmacy market share in OTC segment (value)</p> <p><b>11.2%</b></p>
<p>Registered e-Pharmacies</p> <p><b>149</b></p>	<p>IQVIA panel e-Pharmacies</p> <p><b>5</b></p>			

Source: IQVIA Pharmatrend, CZ, 2021

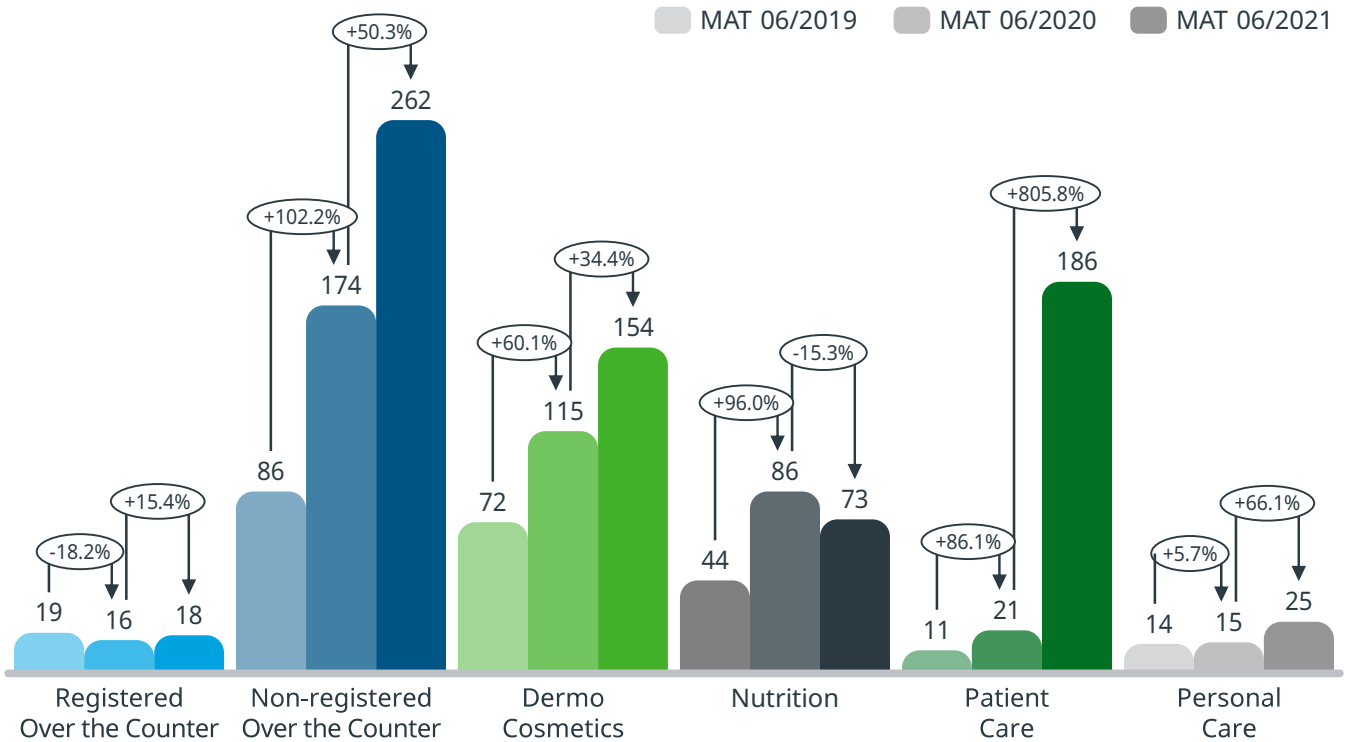
# Czech Republic e-Pharmacy market dynamics

Contribution to overall Consumer Health market growth by pharmacy type [CZK mil, MAT 06/2021]

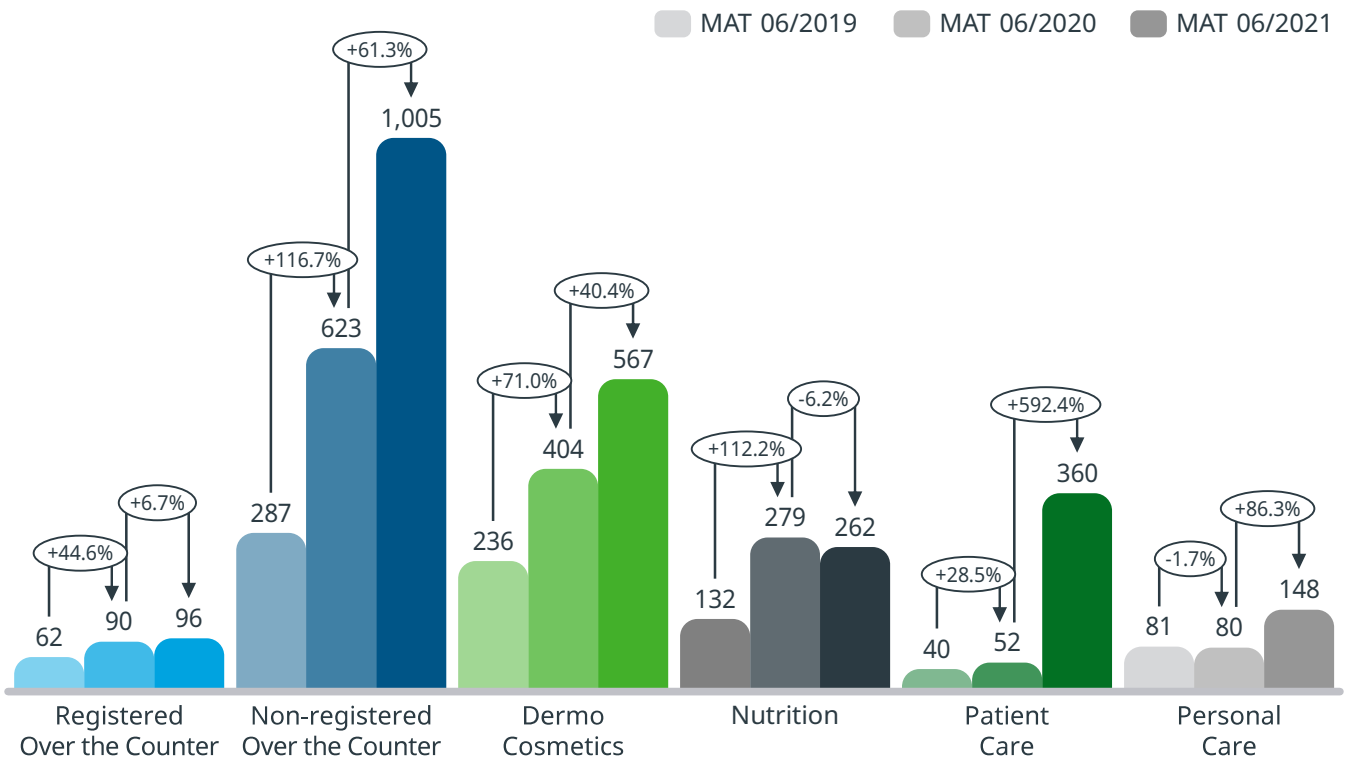


Source: IQVIA Pharmatrend, CZ, 2021

**e-Pharmacy: Value of new packs launched in the last 24 months [CZK mil, MAT 06/2019-2021]**



**e-Pharmacy: Volume of new packs launched in the last 24 months [units ths, MAT 06/2019-2021]**

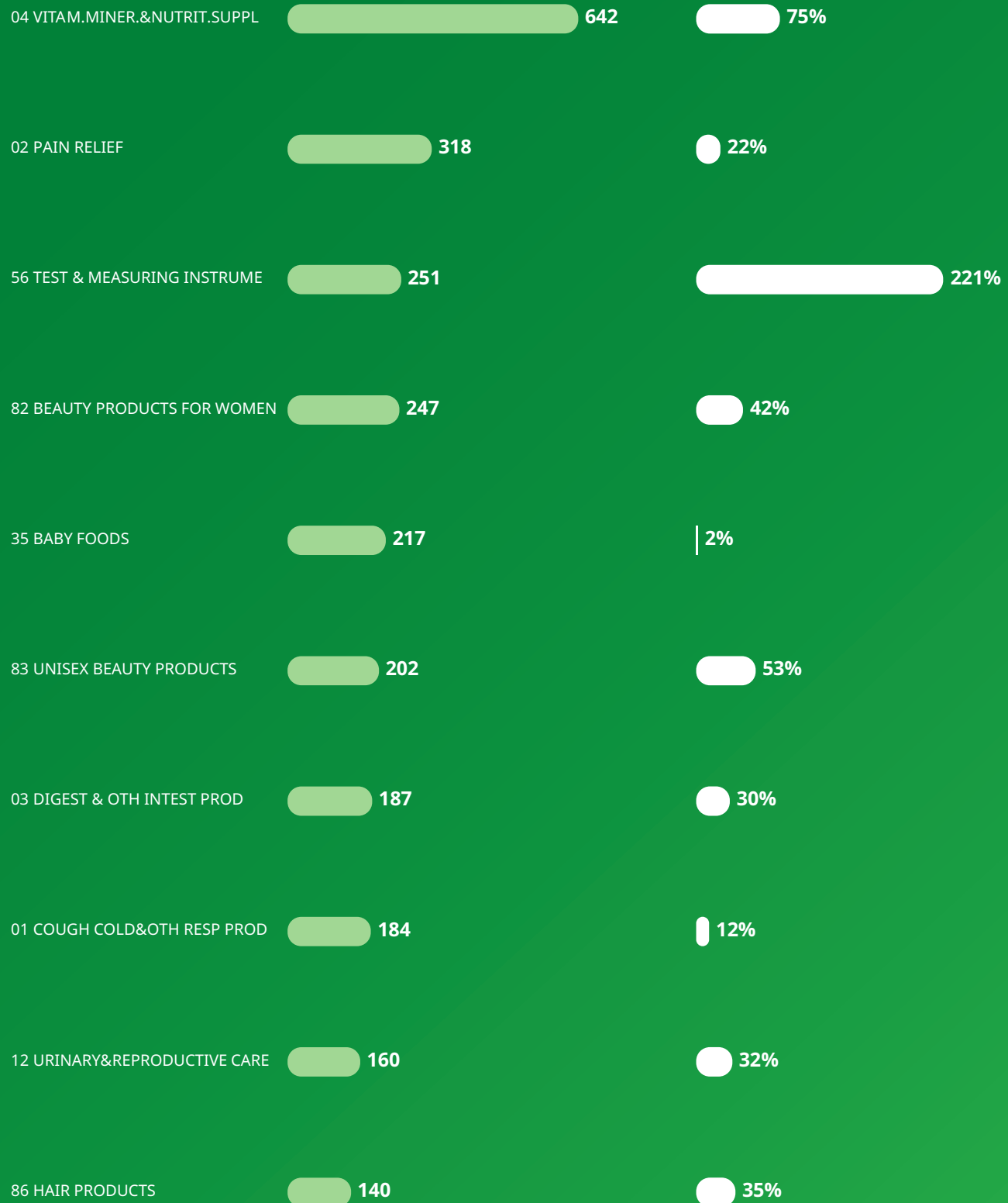


Source: IQVIA Pharamatrend, CZ, 2021

# Czech Republic e-Pharmacy top 10 OTC1 groups dynamics

Top 10 OTC1 groups by value [CZK mil, MAT 06/2021]

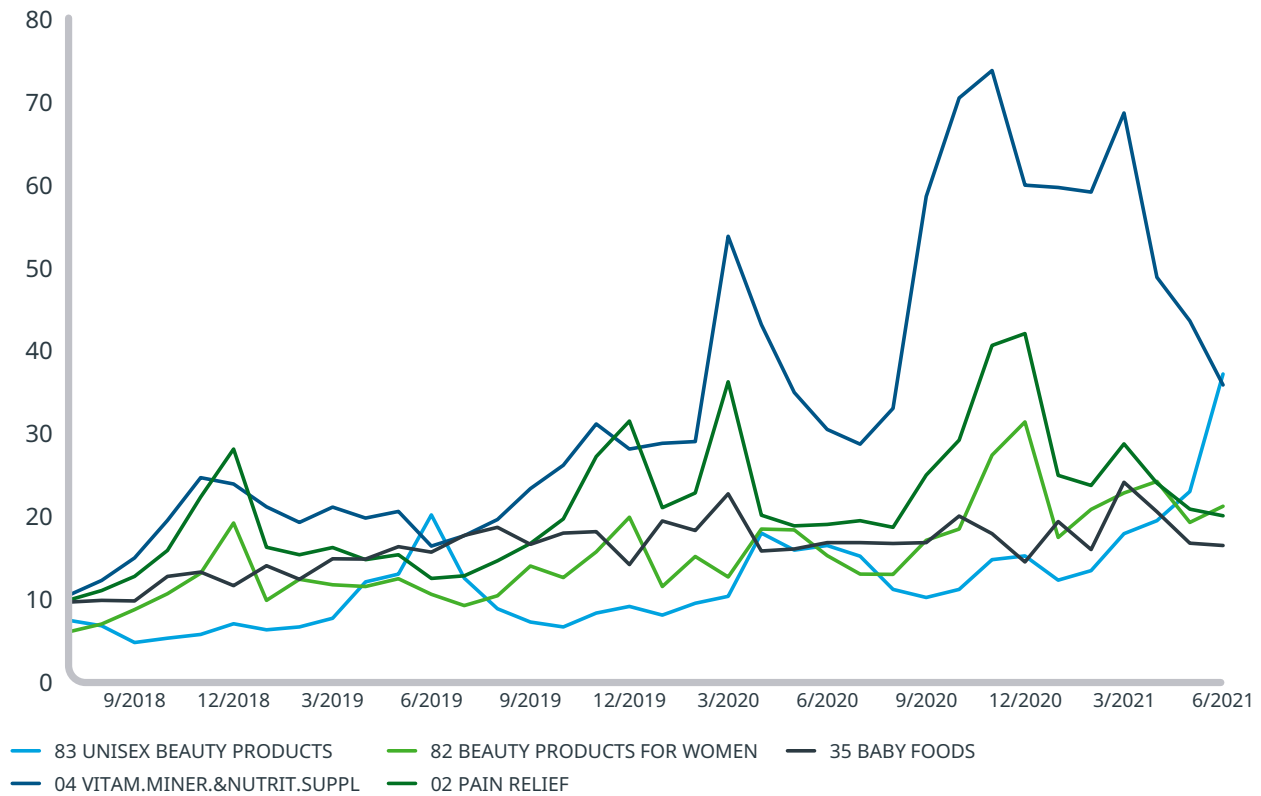
PPG [%, MAT 06/2021]



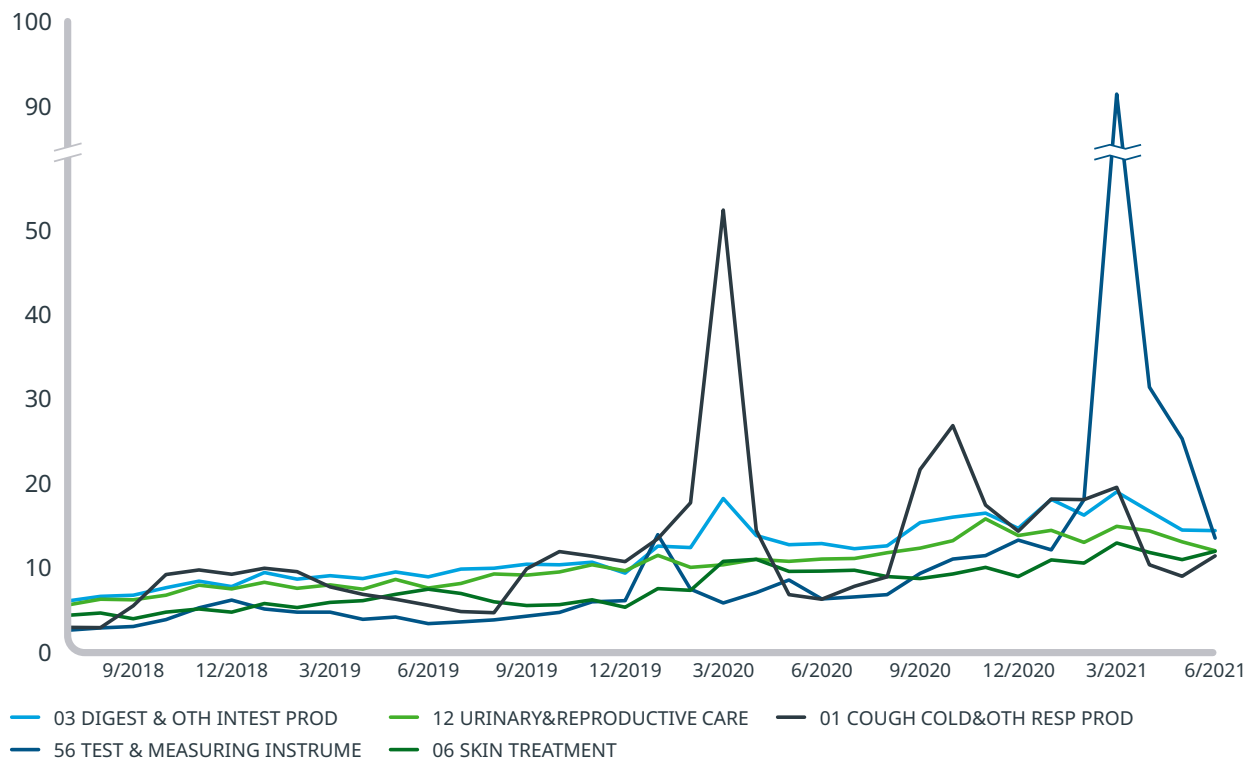
Source: IQVIA Pharmatrend, CZ, 2021

# Czech Republic e-Pharmacy key OTC1 groups

Top 1-5 OTC1 groups in terms of value [CZK mil, 07/2018 - 06/2021]



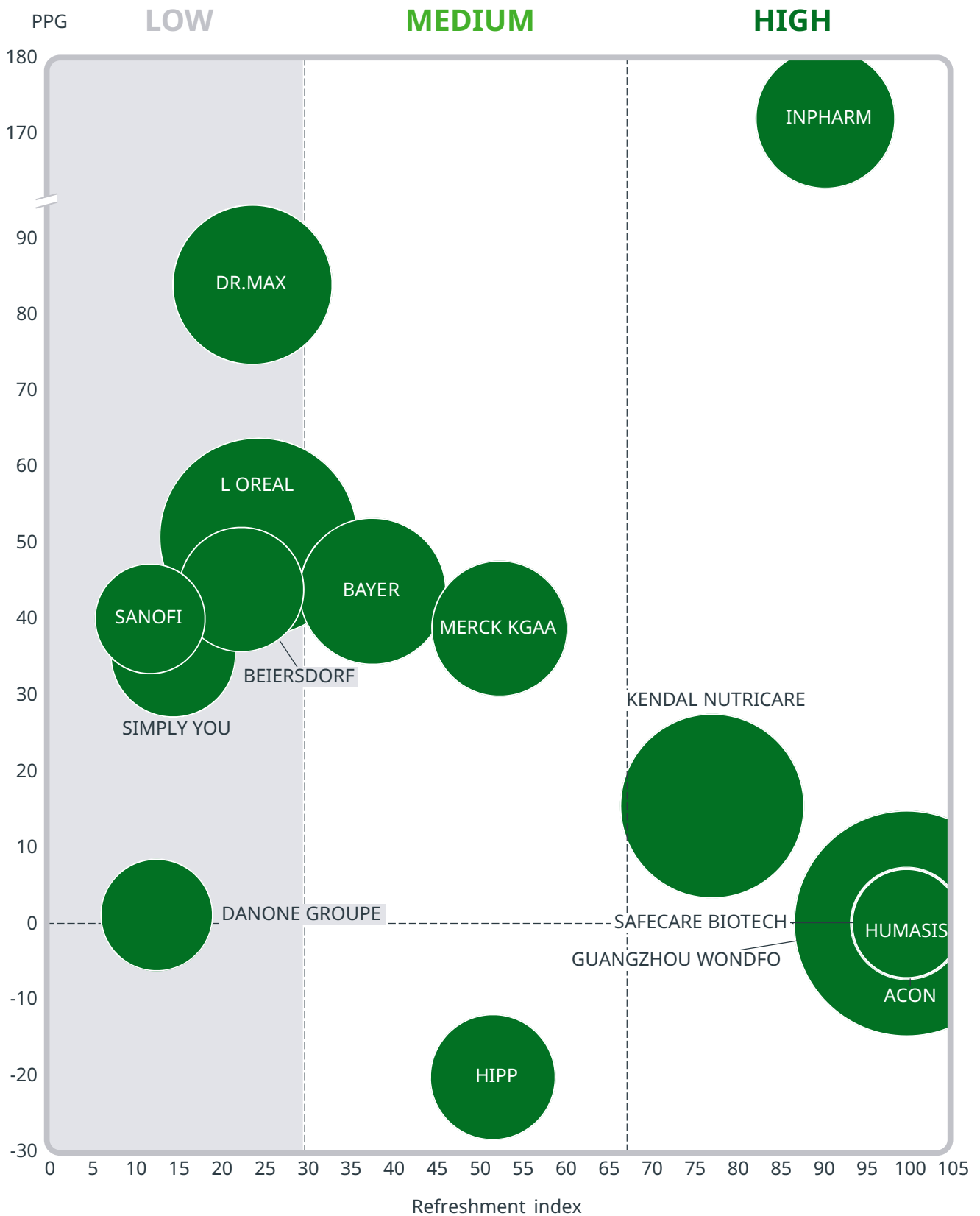
Top 6-10 OTC1 groups in terms of value [CZK mil, 07/2018 - 06/2021]



Source: IQVIA Pharmatrend, CZ, 2021

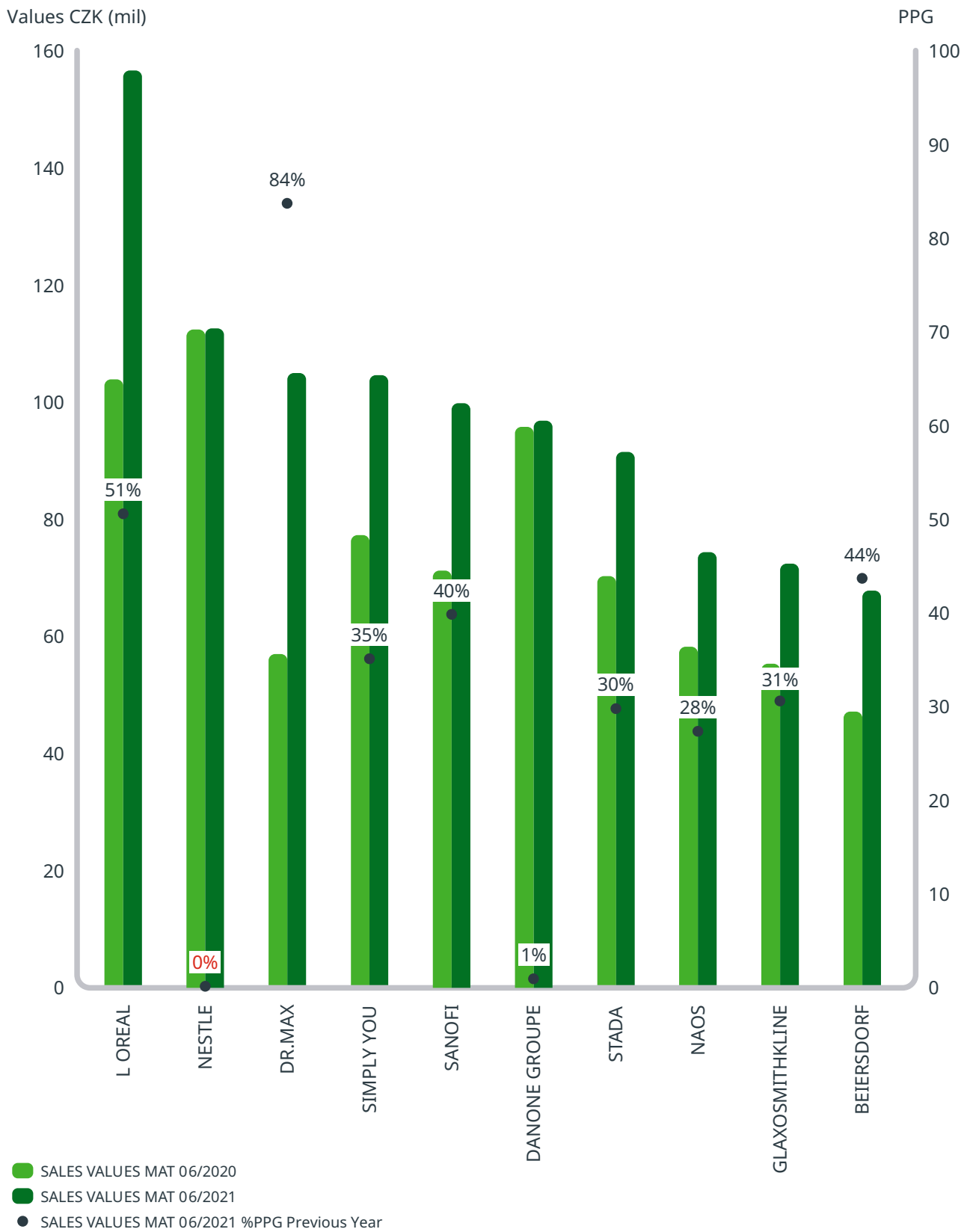
# Czech Republic e-Pharmacy portfolio refreshment

e-Commerce product refreshment index [MAT 06/2021]



Note: Refreshment Index = turnover from new launches / total company turnover; New pack launches in last 24 months  
 Source: IQVIA Pharamatrend, CZ, 2021

Top 10 corporations in e-Commerce by sales value (incl. PPG) [CZK mil, MAT 06/2021]



Source: IQVIA Pharmatrend, CZ, 2021

# e-Pharmacy market share on Slovak Consumer Health market

Total Slovak Consumer Health market value – split by channel [EUR mil, MAT 06/2019-2021]



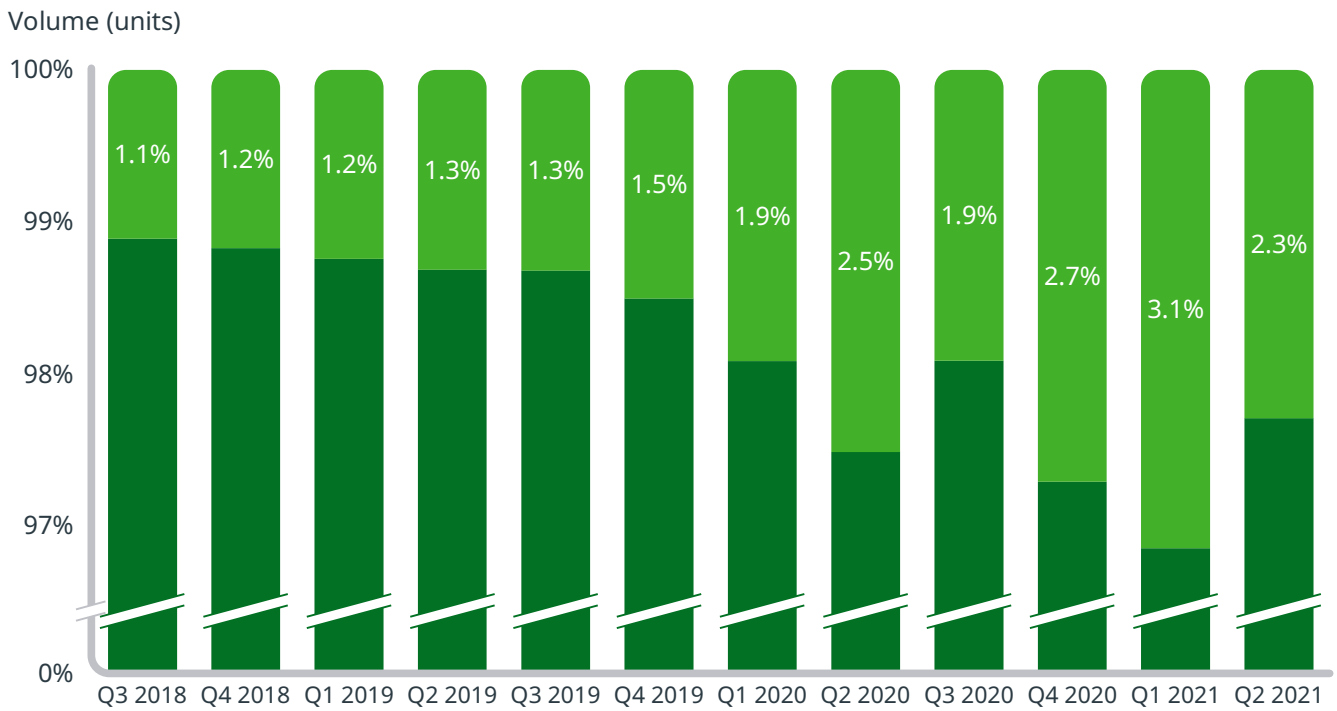
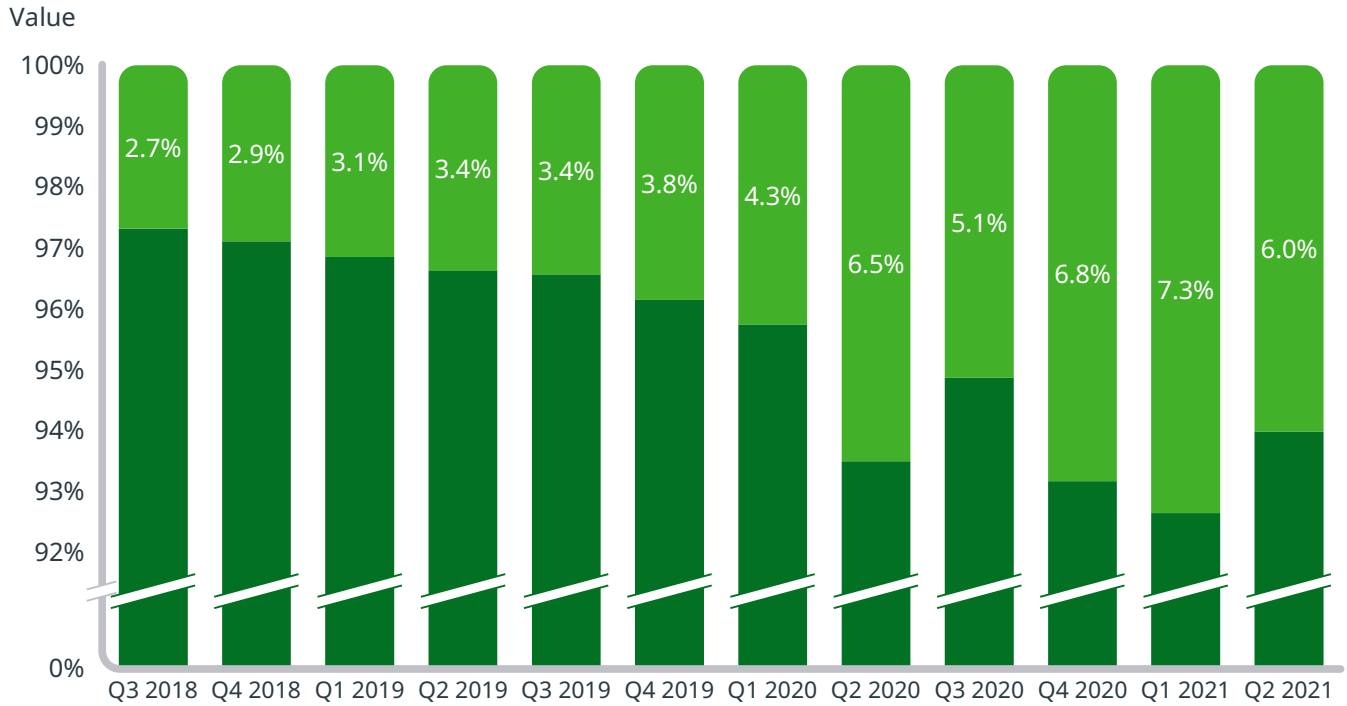
■ e-Commerce ■ Street Pharmacy

Source: IQVIA Pharmatrend, SK, 2021



# Slovakia e-Pharmacy landscape

Market share split e-Commerce vs. traditional pharmacies [Q3 2018 – Q2 2021]



■ e-Pharmacy
 ■ Street Pharmacy

Source: IQVIA Pharmatrend, SK, 2021

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**e-Commerce development over past 3 years in value [EUR mil, week 28/2019 – 28/2021]**



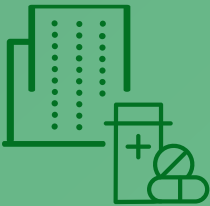
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**e-Commerce development over past 3 years in volume [units ths, week 28/2019 – 28/2021]**



Source: IQVIA Pharmatrend, SK, 2021

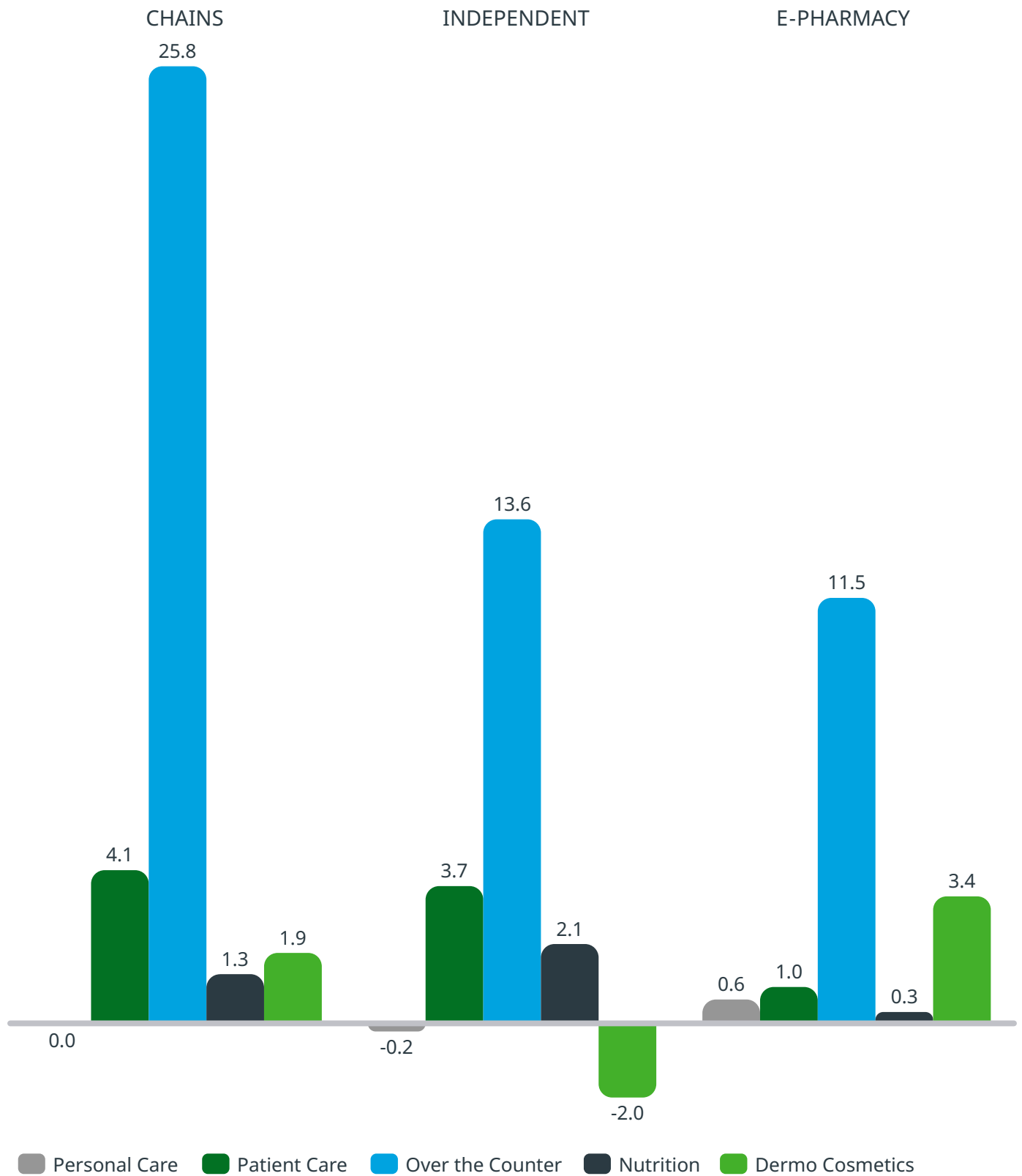
e-Pharmacy landscape in Slovakia [MAT 06/2021]

<p><b>Top e-Pharmacies in alphabetical order</b> (all in IQVIA e-Pharmacy SK panel)</p> <p><i>Benu</i></p> <p><i>Dr.Max</i></p> <p><i>Mojalekaren.sk</i></p> <p><i>Pilulka.sk</i></p> 		<p>e-Pharmacy market value (EUR mil)</p> <p><b>45.3</b></p>	<p>e-Pharmacy market PPG growth (value)</p> <p><b>59.0%</b></p>	<p>e-Pharmacy market share in total CH (value)</p> <p><b>6.4%</b></p>
<p>Pharmacies</p> <p><b>2,368</b></p>	<p>IQVIA panel e-Pharmacies</p> <p><b>5</b></p>	<p>IQVIA e-Pharmacy market value represented by TOP5 e-Pharmacies</p> <p><b>75%</b></p>	<p>e-Pharmacy market PPG growth (volume)</p> <p><b>43.0%</b></p>	<p>e-Pharmacy market share in OTC segment (value)</p> <p><b>5.8%</b></p>

Source: IQVIA Pharmatrend, SK, 2021

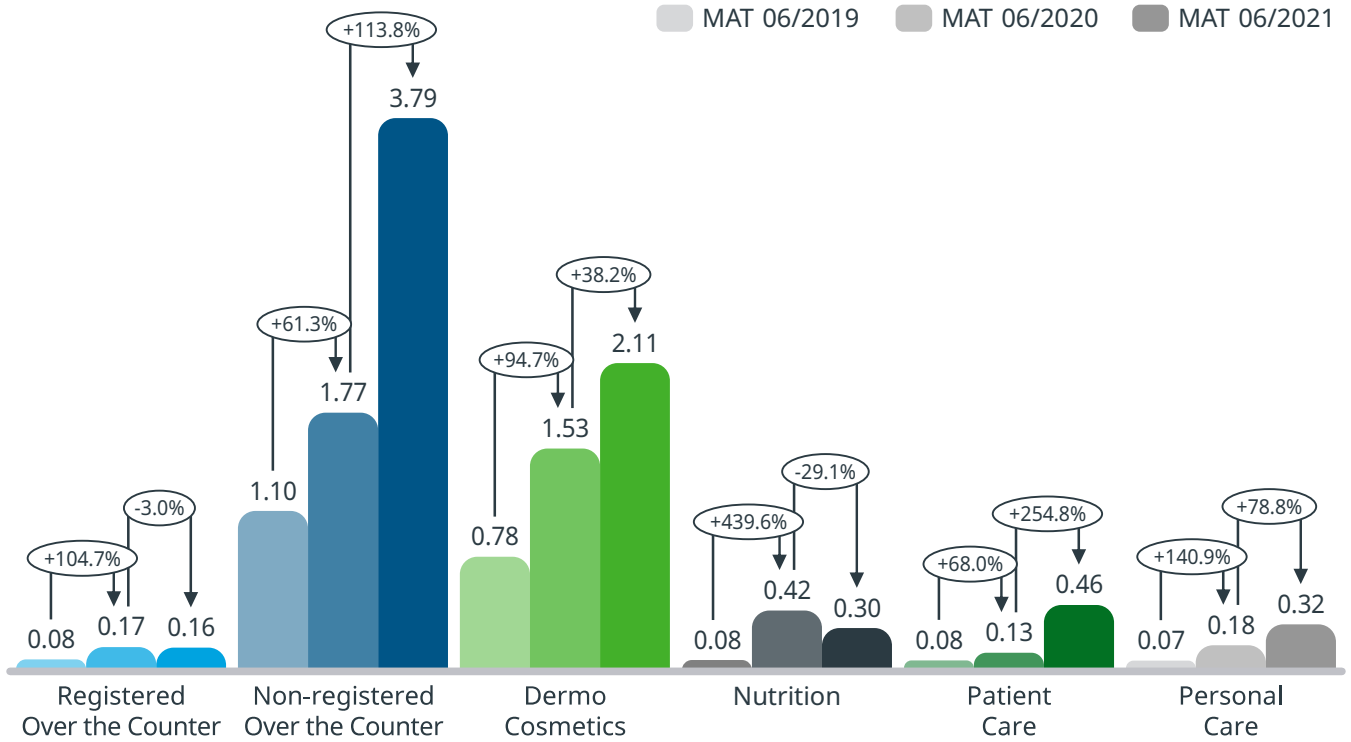
# Slovakia e-Pharmacy market dynamics

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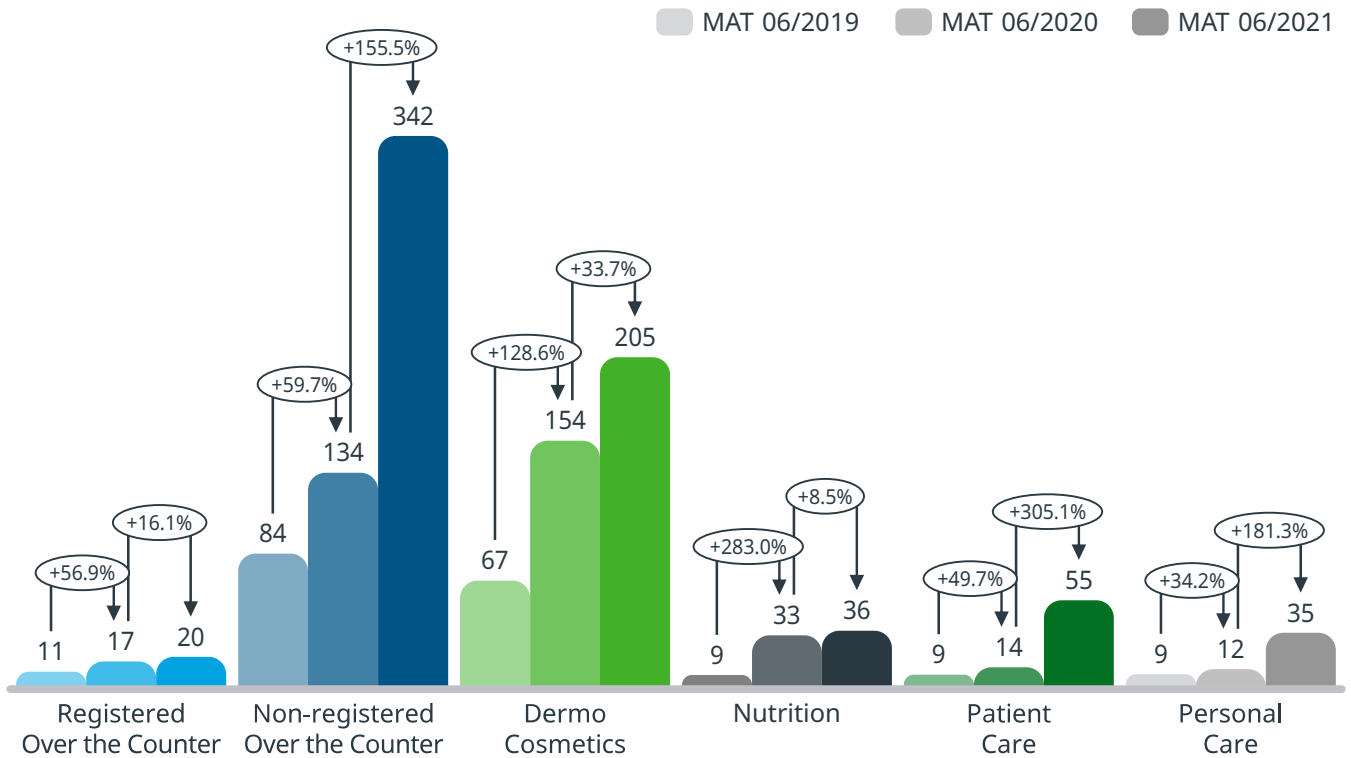


Source: IQVIA Pharmatrend, SK, 2021

**e-Pharmacy: Value of new packs launched in the last 24 months [EUR mil, MAT 06/2019-2021]**



**e-Pharmacy: Volume of new packs launched in the last 24 months [units ths, MAT 06/2019-2021]**



Source: IQVIA Pharmatrend, SK, 2021

# Slovakia e-Pharmacy top 10 OTC1 groups dynamics

Top 10 OTC1 groups by value [EUR mil, MAT 06/2021]

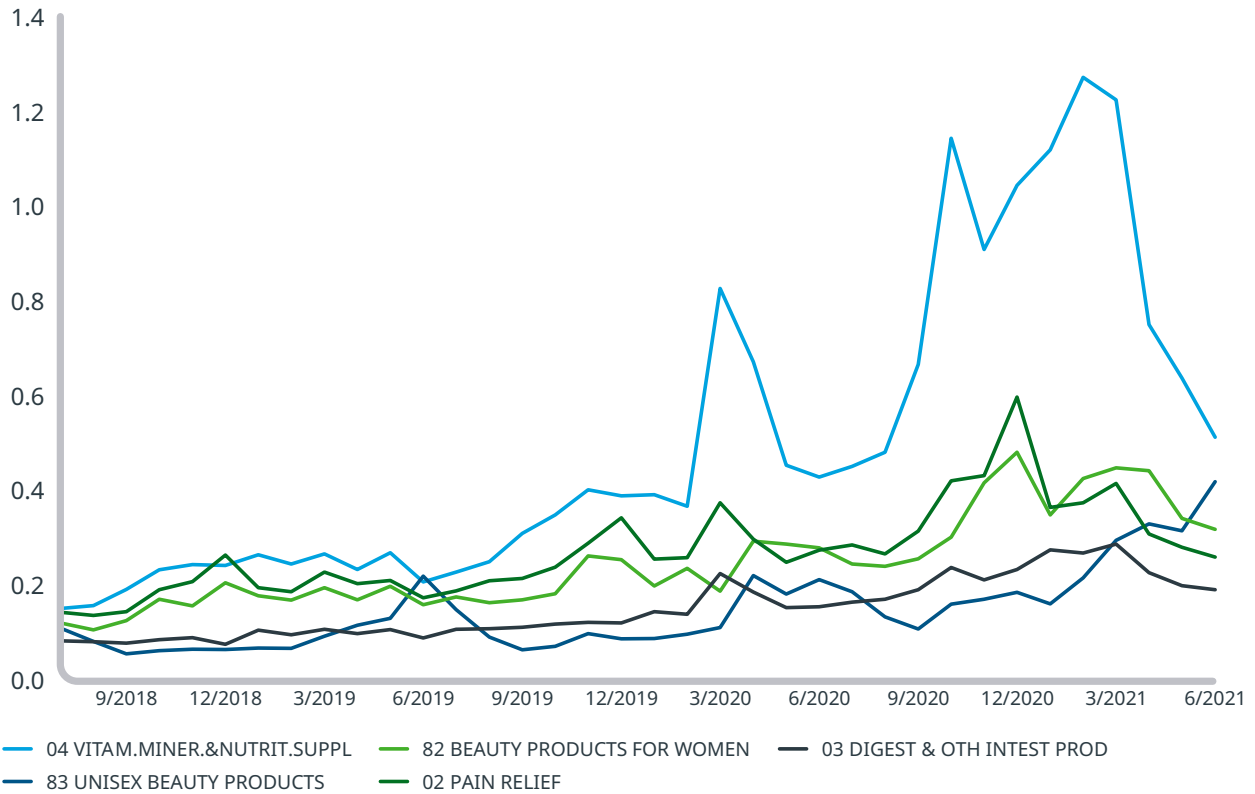
PPG [%, MAT 06/2021]



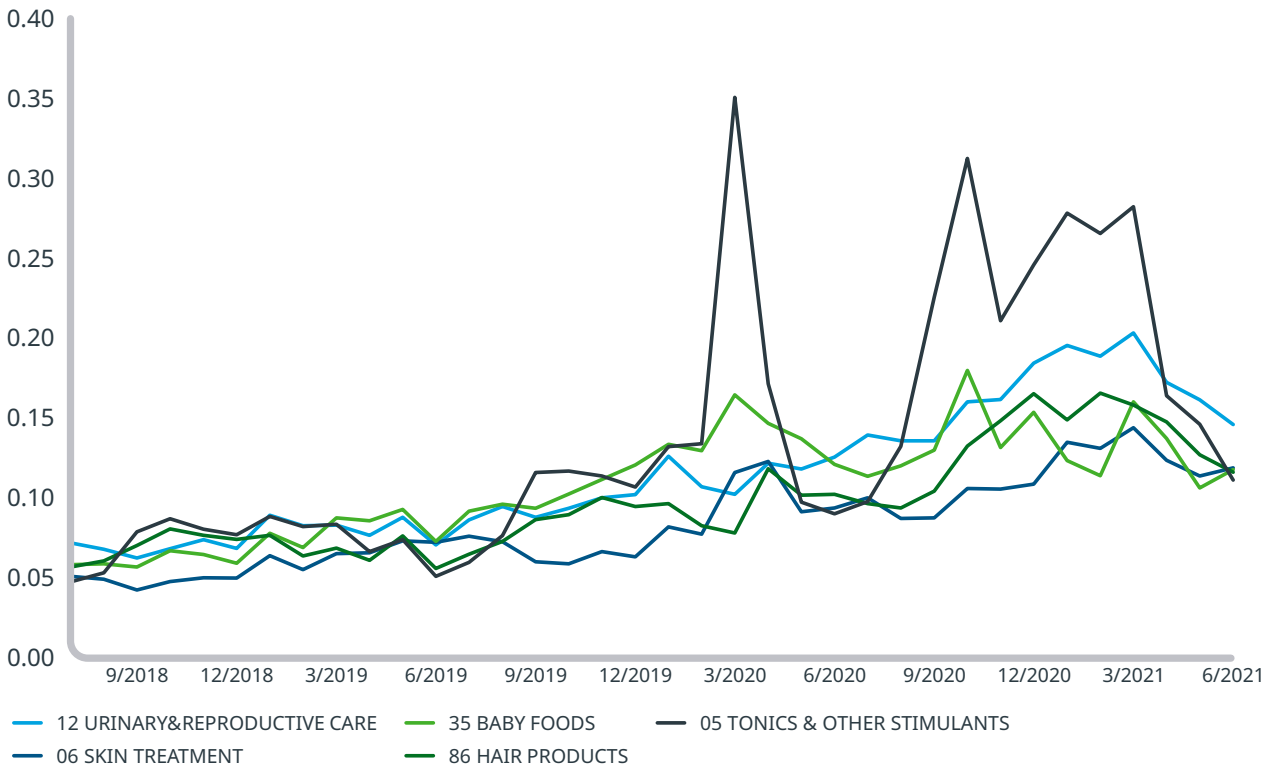
Source: IQVIA Pharmatrend, SK, 2021

# Slovakia e-Pharmacy key OTC1 groups

Top 1-5 OTC1 groups in terms of value [EUR mil, 07/2018 - 06/2021]



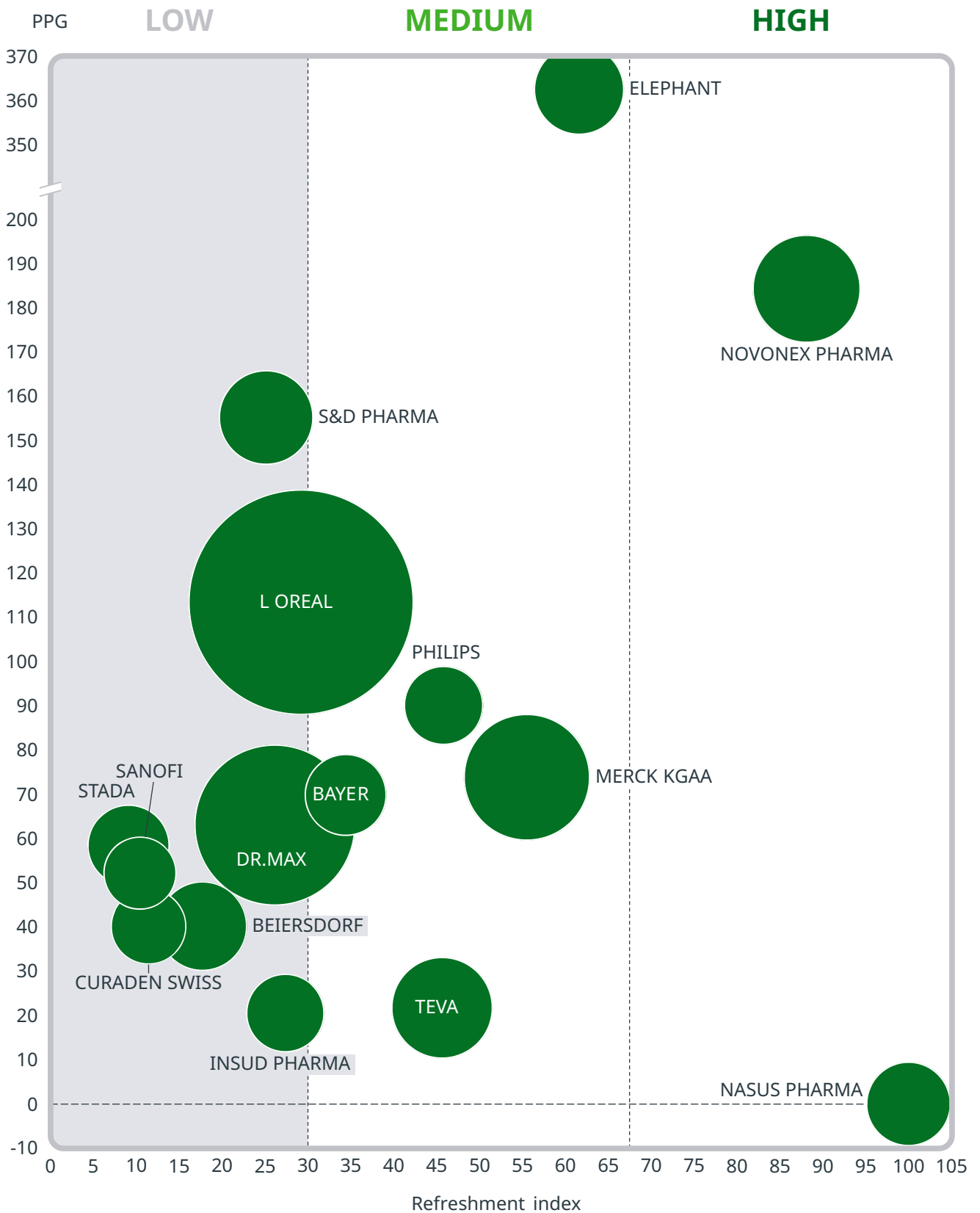
Top 6-10 OTC1 groups in terms of value [EUR mil, 07/2018 - 06/2021]



Source: IQVIA Pharamatrend, SK, 2021

# Slovakia e-Pharmacy portfolio refreshment

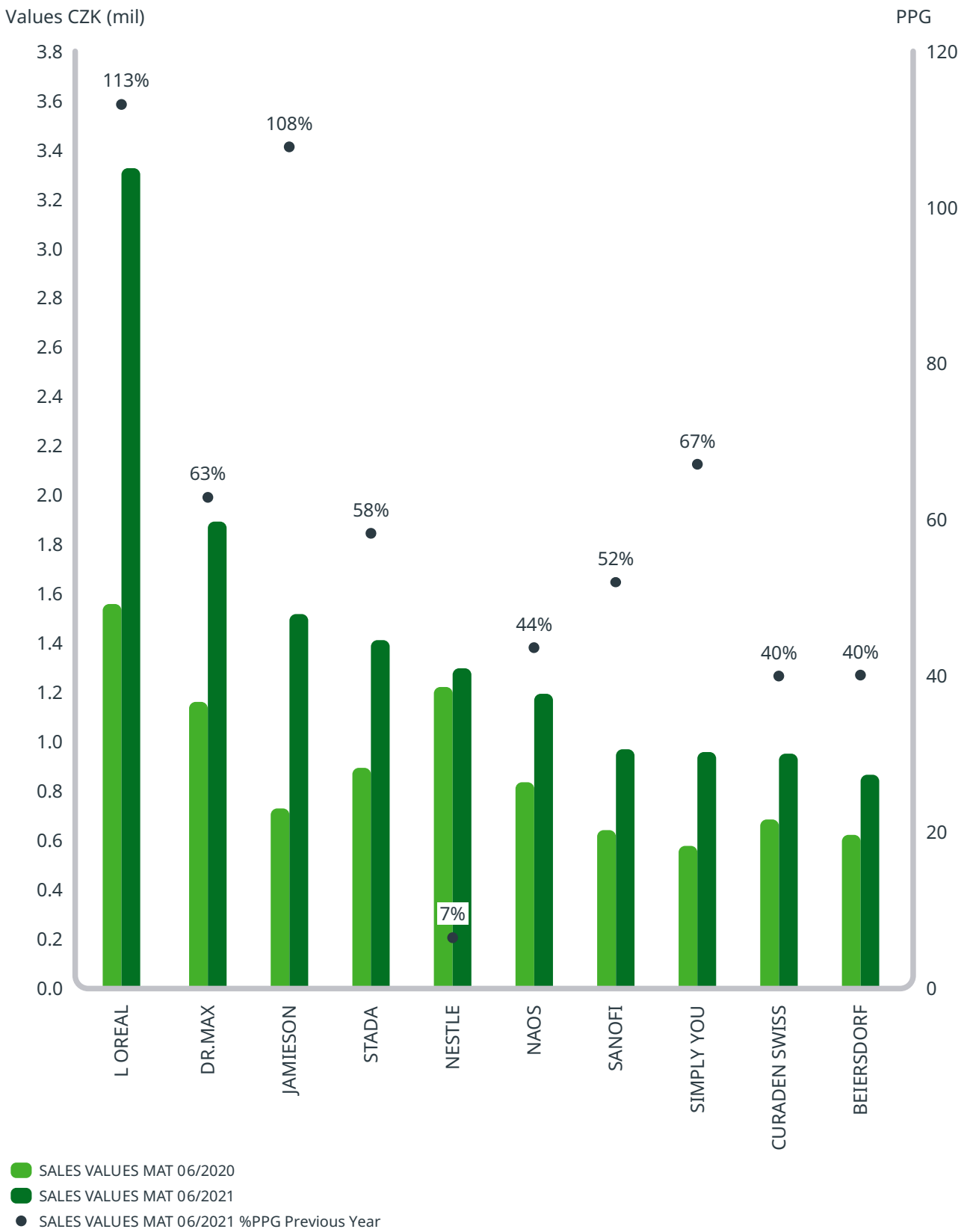
e-Commerce product refreshment index [MAT 06/2021]



Note: Refreshment Index = turnover from new launches / total company turnover; New pack launches in last 24 months  
 Source: IQVIA Pharmatrend, SK, 2021



Top 10 corporations in e-Commerce by sales value (incl. PPG) [EUR mil, MAT 06/2021]



Source: IQVIA Pharmatrend, SK, 2021

# About the authors



**MARTIN  
ŠLÉGL**

**General Manager,  
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IQVIA**

Martin Šlégl has over a decade of experience in the area of management consulting with expert knowledge of the pharma market. Before becoming the General Manager of the Czech Republic and Slovakia, Martin managed consulting, market research, advanced analytics, and the Real World Data team in Southeast Europe, covering 10 countries. Prior to joining IQVIA, he worked at Roland Berger.

Martin holds CEMS Master's in International Management and Master's in Business Economics degrees from ESADE in Barcelona and the Prague University of Economics and Business.



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Ondřej Sýkora is an innovative marketing professional with business experience from Europe, North America, and Southeast Asia.

Before joining IQVIA, Ondřej worked at a New York City-based investment firm where he was responsible for digital marketing, process automation, and public relations.

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