



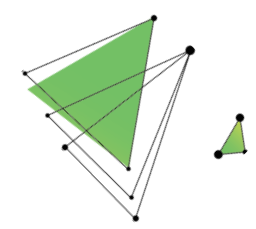
The Network's Road 4° EDIZIONE

**La collaborazione misurabile con
l'industria: strategie di rete**

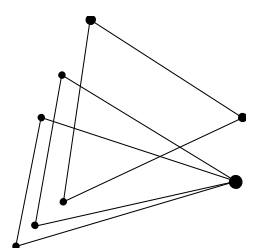
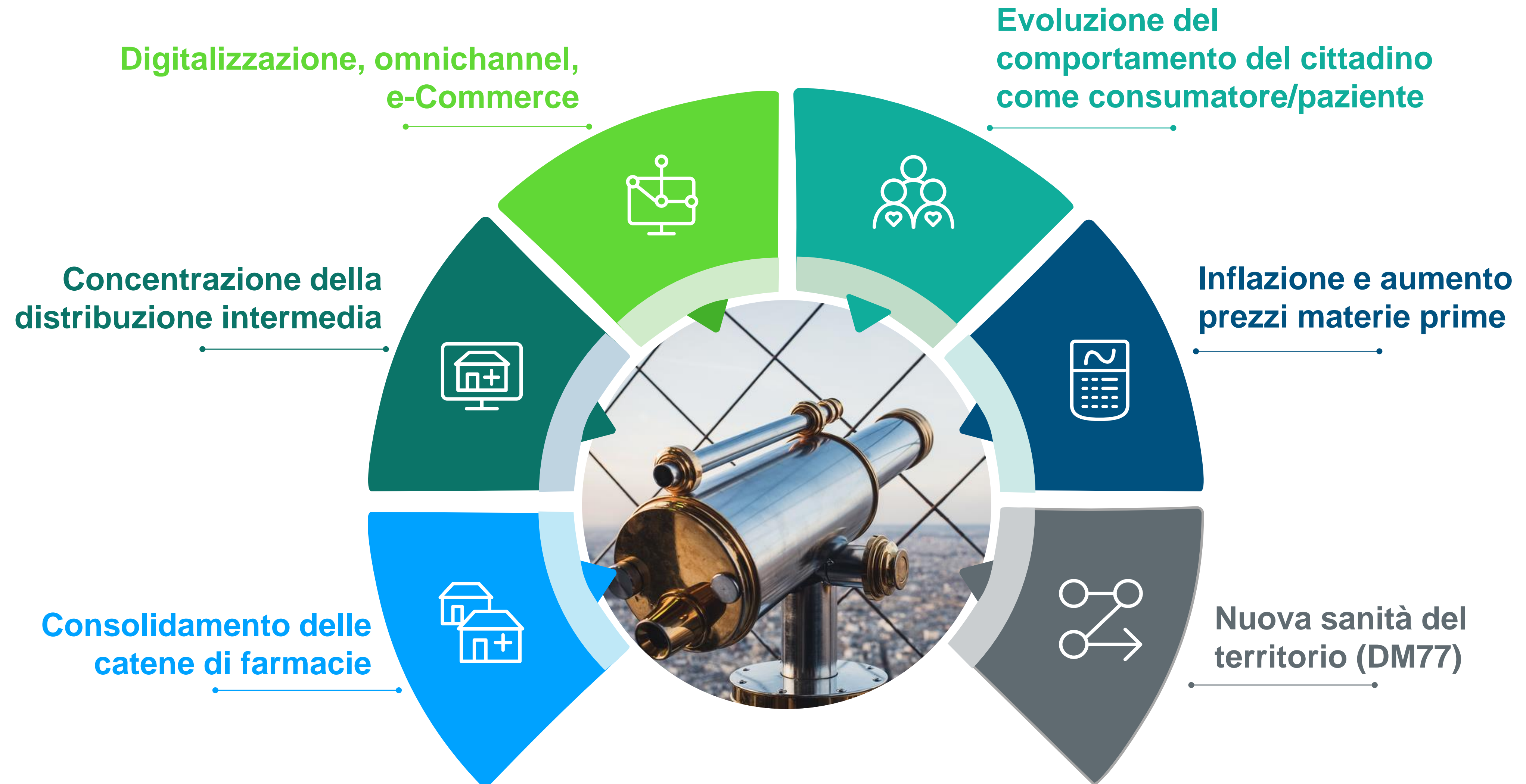
FRANCESCO CAVONE

Sr Principal, Consulting & Services

 **IQVIA**



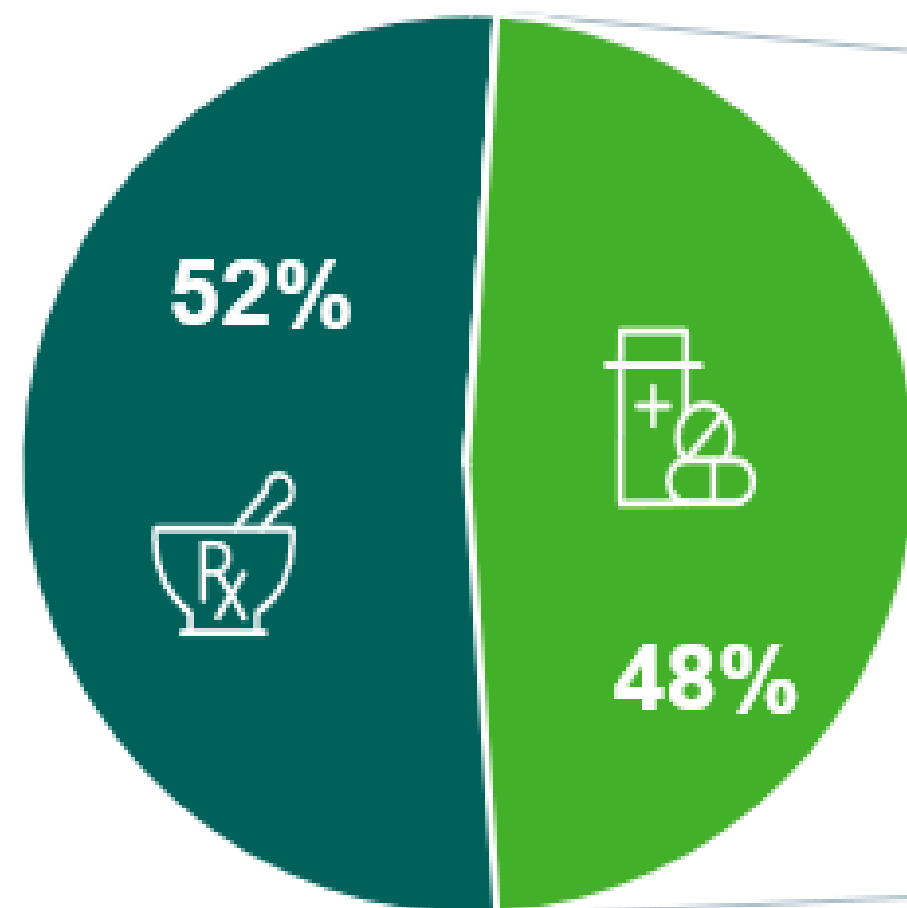
Il contesto di riferimento



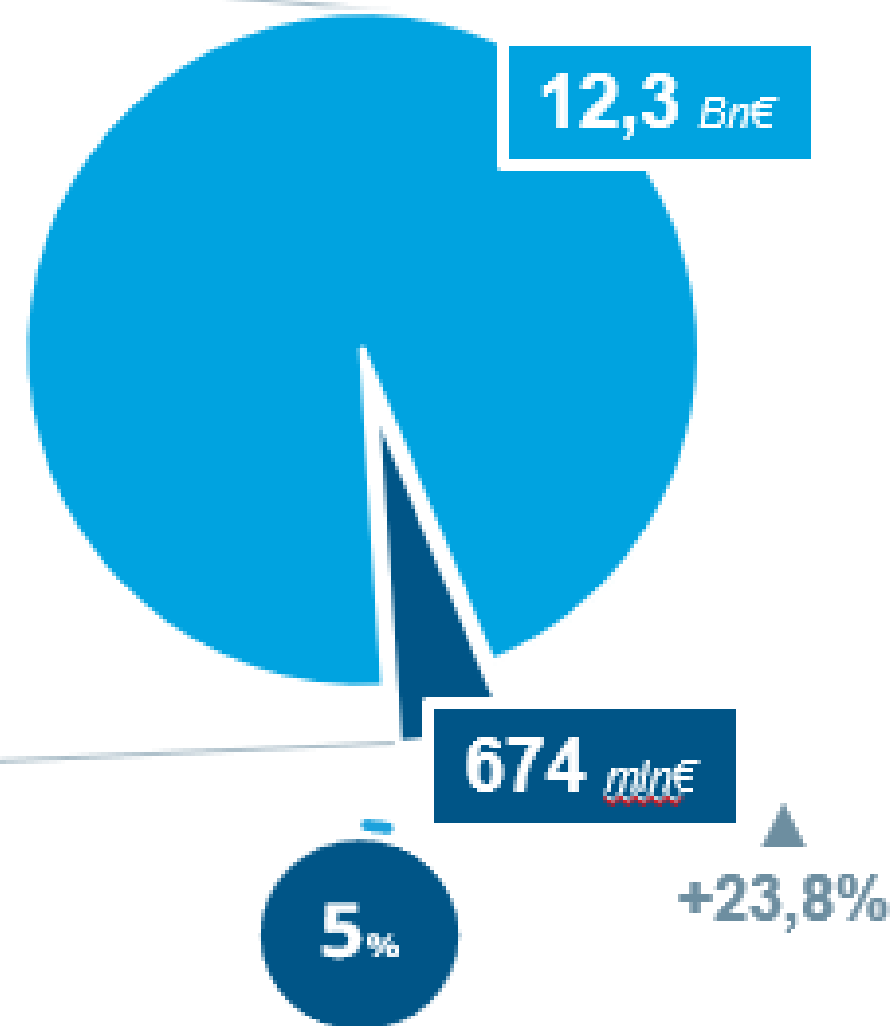
Il mercato in farmacia: continua il trend in terreno positive e anche l'etico guida la crescita

Fatturato 2022 (offline+online, F+P)

€ **27,2** Bn€ ▲ +5,1%

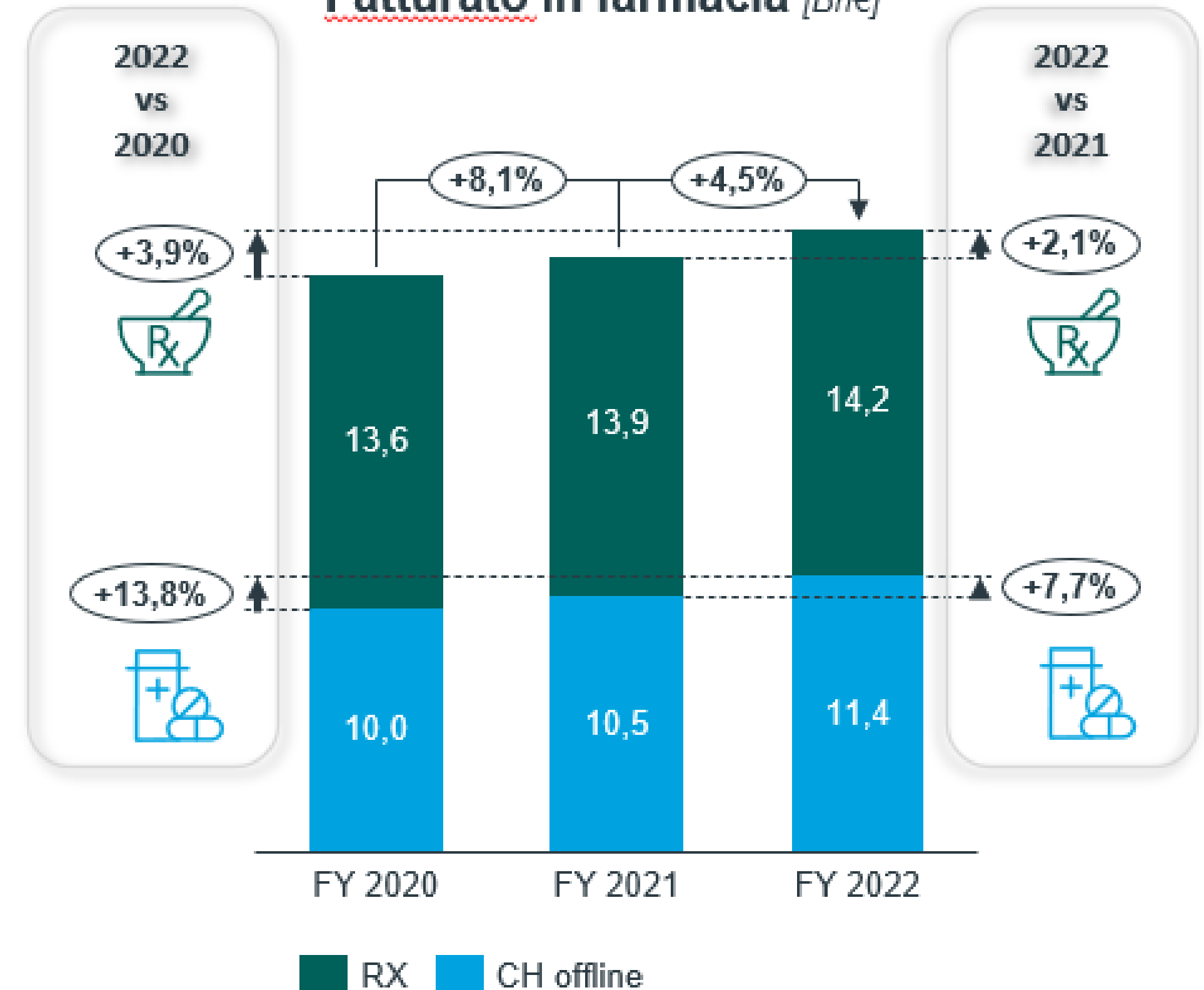


- Offline RX
- Offline CH (F+P)
- Online CH

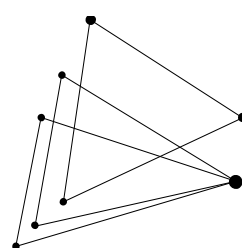


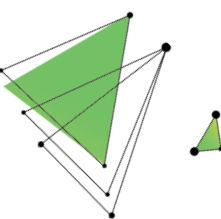
Source: Multichannel 2022 fatturato in farmacia, parafarmacia e online

Fatturato in farmacia [Bn€]



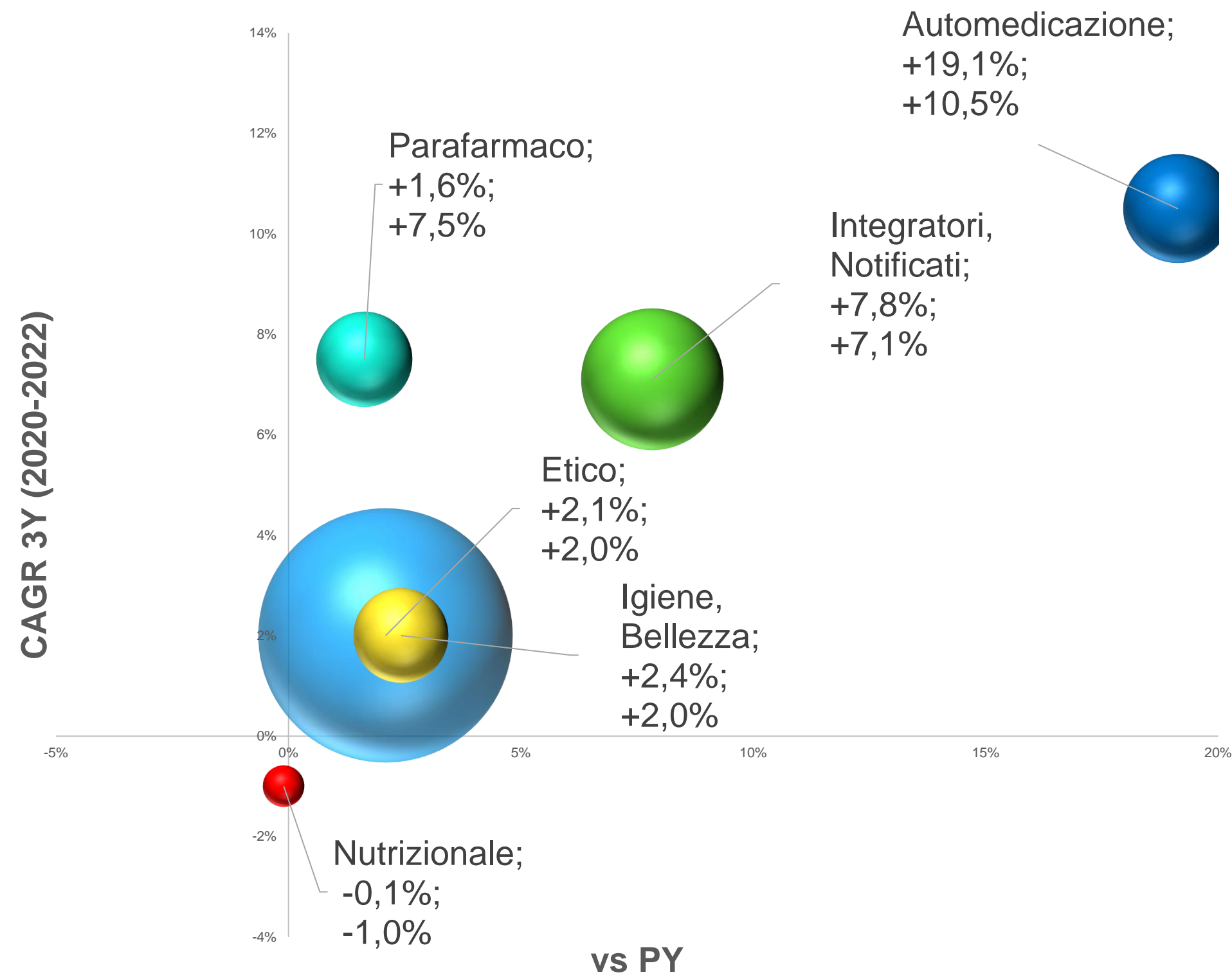
Source: Multichannel MAT12/22 fatturato in farmacia



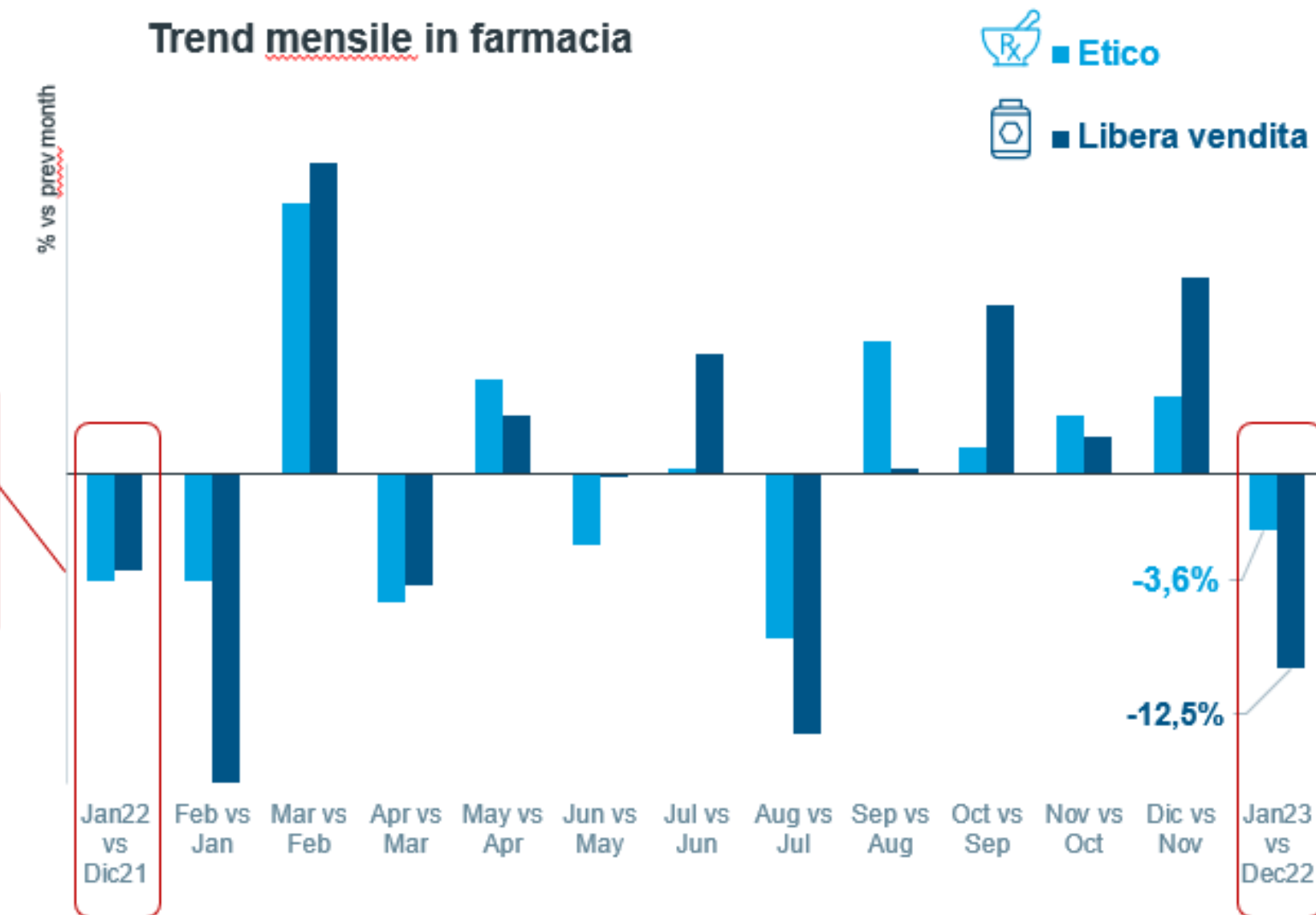


Integratori e notificati confermano la crescita del triennio anche nell'ultimo anno, ma in generale il 2023 inizia in salita per la farmacia

Trend 2022 vs 2021 e confronto con CAGR



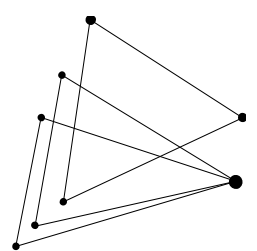
Trend mensile in farmacia



A Gen22 il farmaco etico aveva segnato un trend negative importante, a Gen23 il trend è opposto

Il comparto di libera vendita perde oltre il 12% verso mese precedente, l'etico poco meno del 4%

Source: Multichannel 2022 fatturato in farmacia



Cosa sono le “catene di farmacie”? E’ la combinate di “reali + network strong”

CATENE REALI

- Proprietà di privati, tipicamente fondi

NETWORK “STRONG”

- Gruppi di Farmacisti proprietari del punto vendita e associati in network il cui capogruppo è tipicamente un distributore intermedio, con regole di aggregazione rigide, applicate e condivise

NETWORK “LIGHT”

- Gruppi di Farmacisti proprietari del punto vendita e associati in network il cui capogruppo è tipicamente un distributore intermedio, ma le regole di aggregazione sono blande

INDIPENDENTI

- Farmacie di proprietà di farmacisti e non aggregati

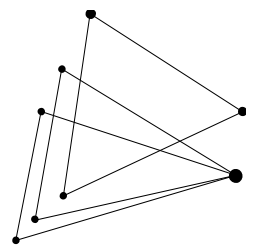
UN NUOVO MEDELLO DI BUSINESS

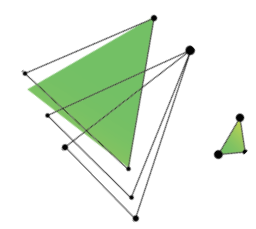
Le catene si consolidano guadagnando potere commerciale

Ottimizzazione portfolio e category management

Organizzazione servizi “sanitari”, e-Commerce e home delivery

Digitalizzazione, strumenti di BI e sistemi di reporting

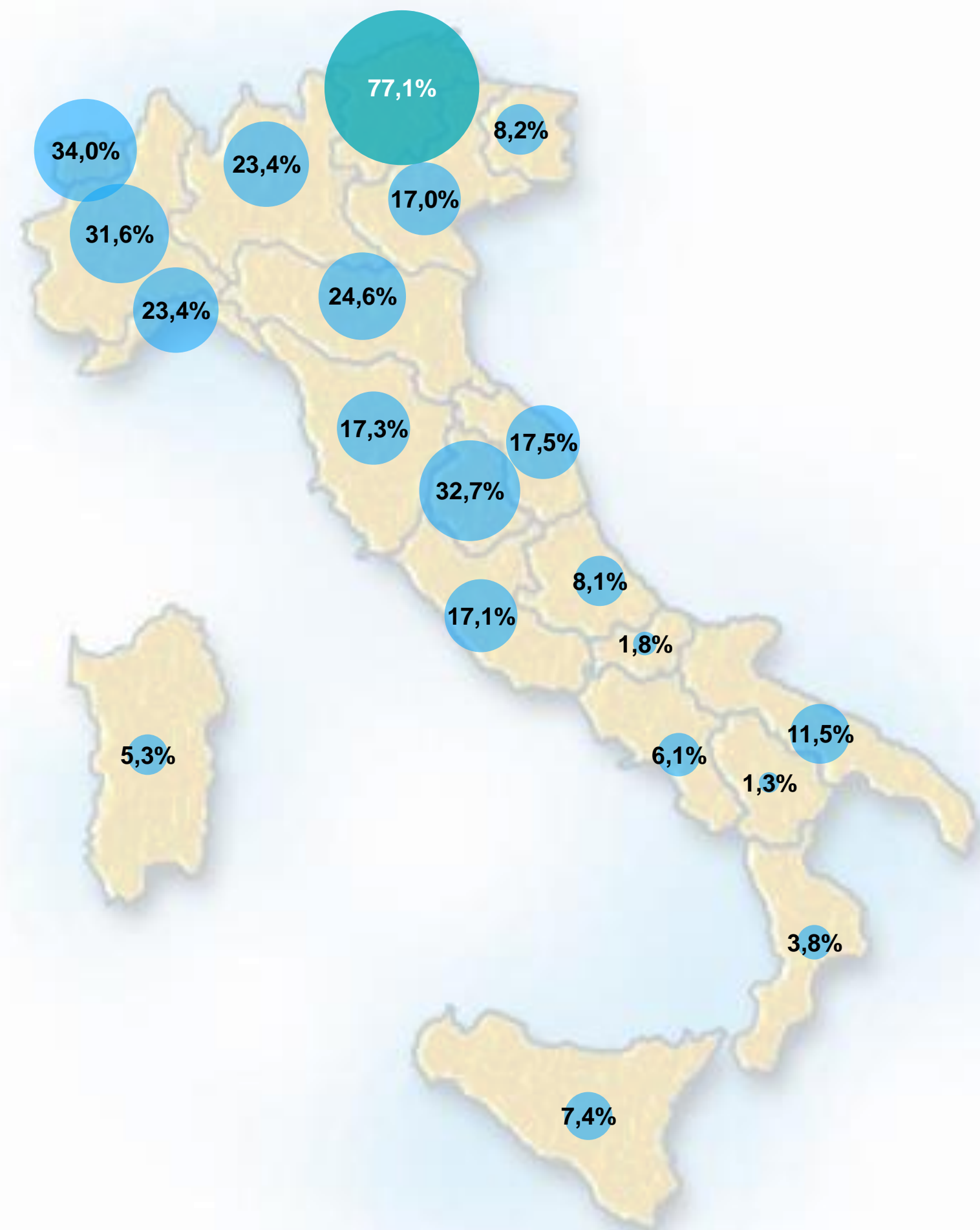




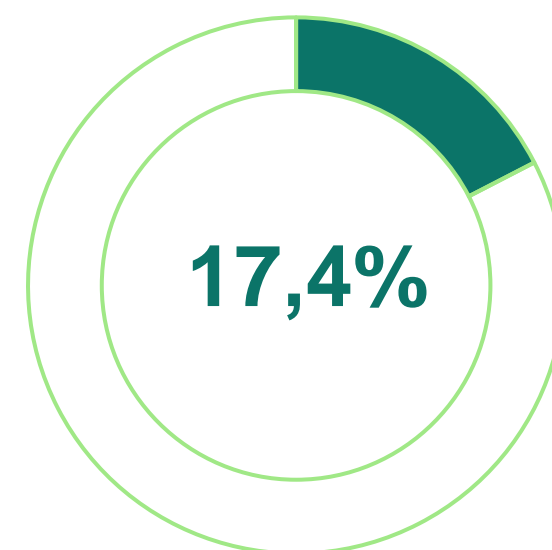
Il fenomeno è in continua evoluzione, ma a livello nazionale non c'è ancora una chiara evidenza



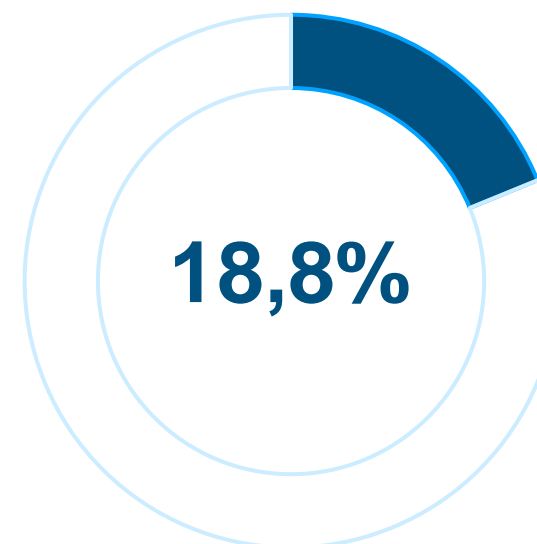
% IN NUMERICA



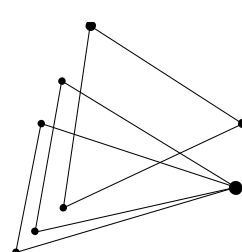
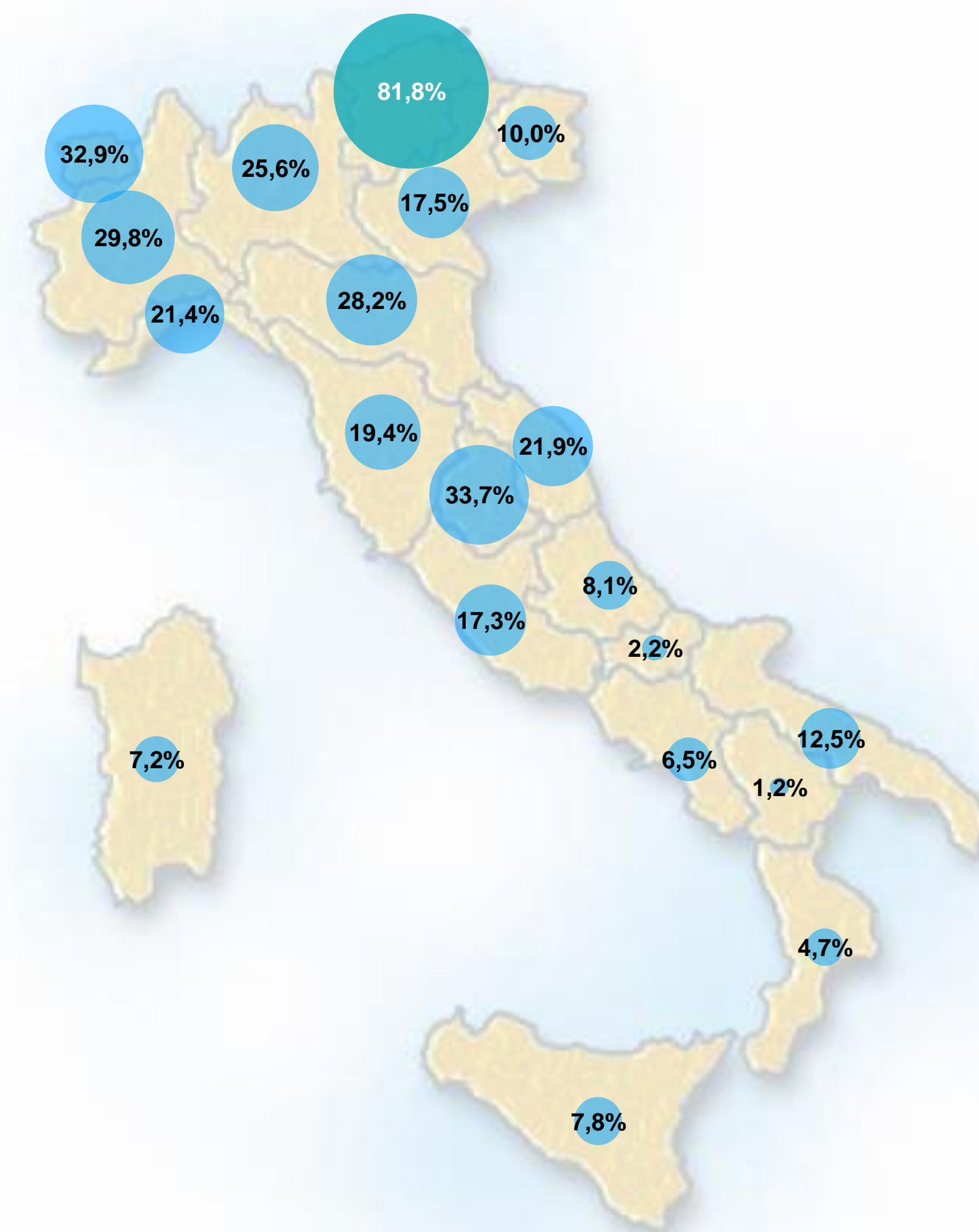
% IN NUMERICA

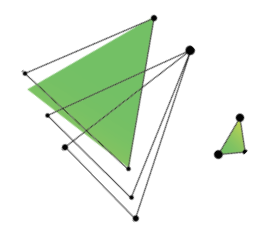


% A VALORE



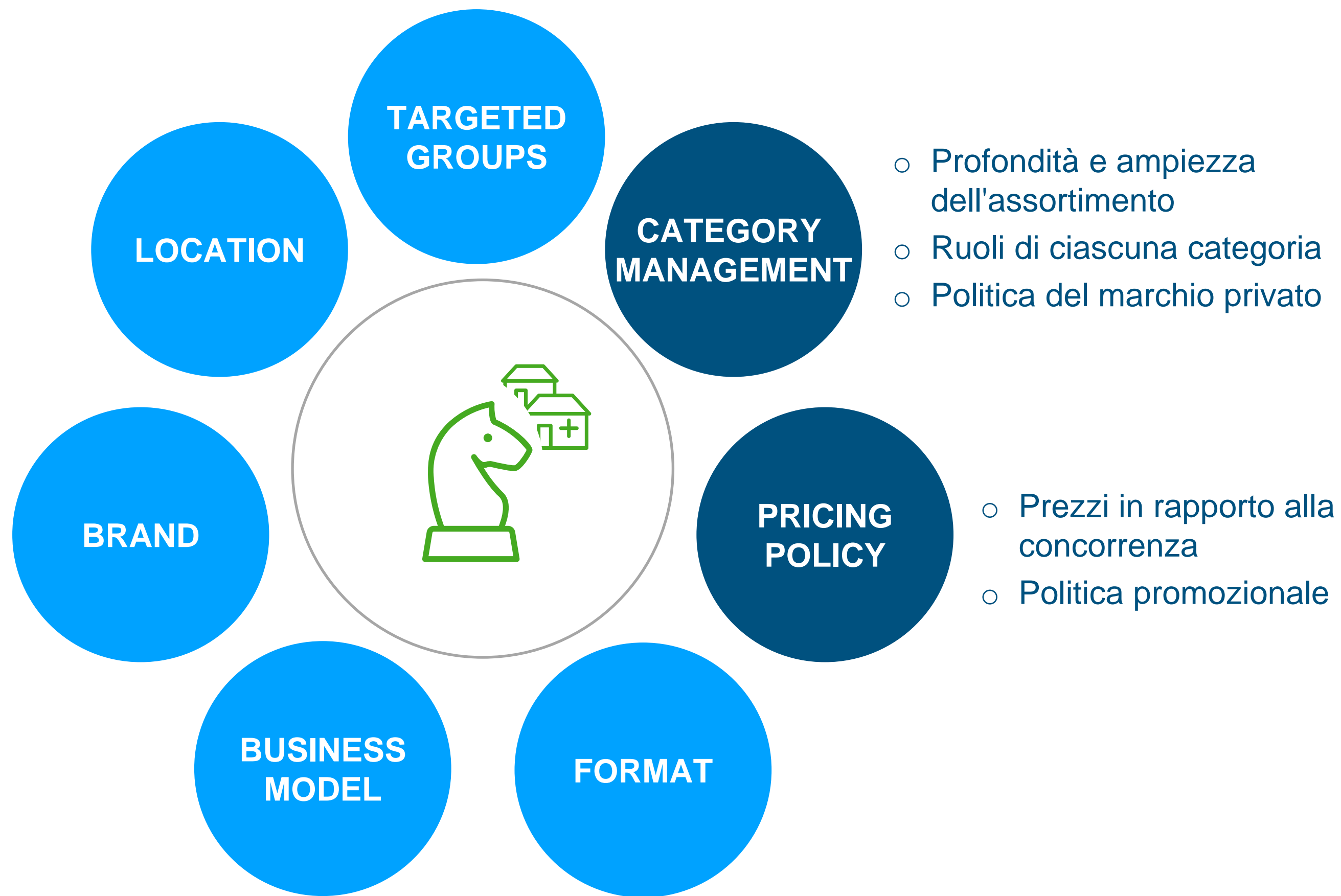
% A VALORE





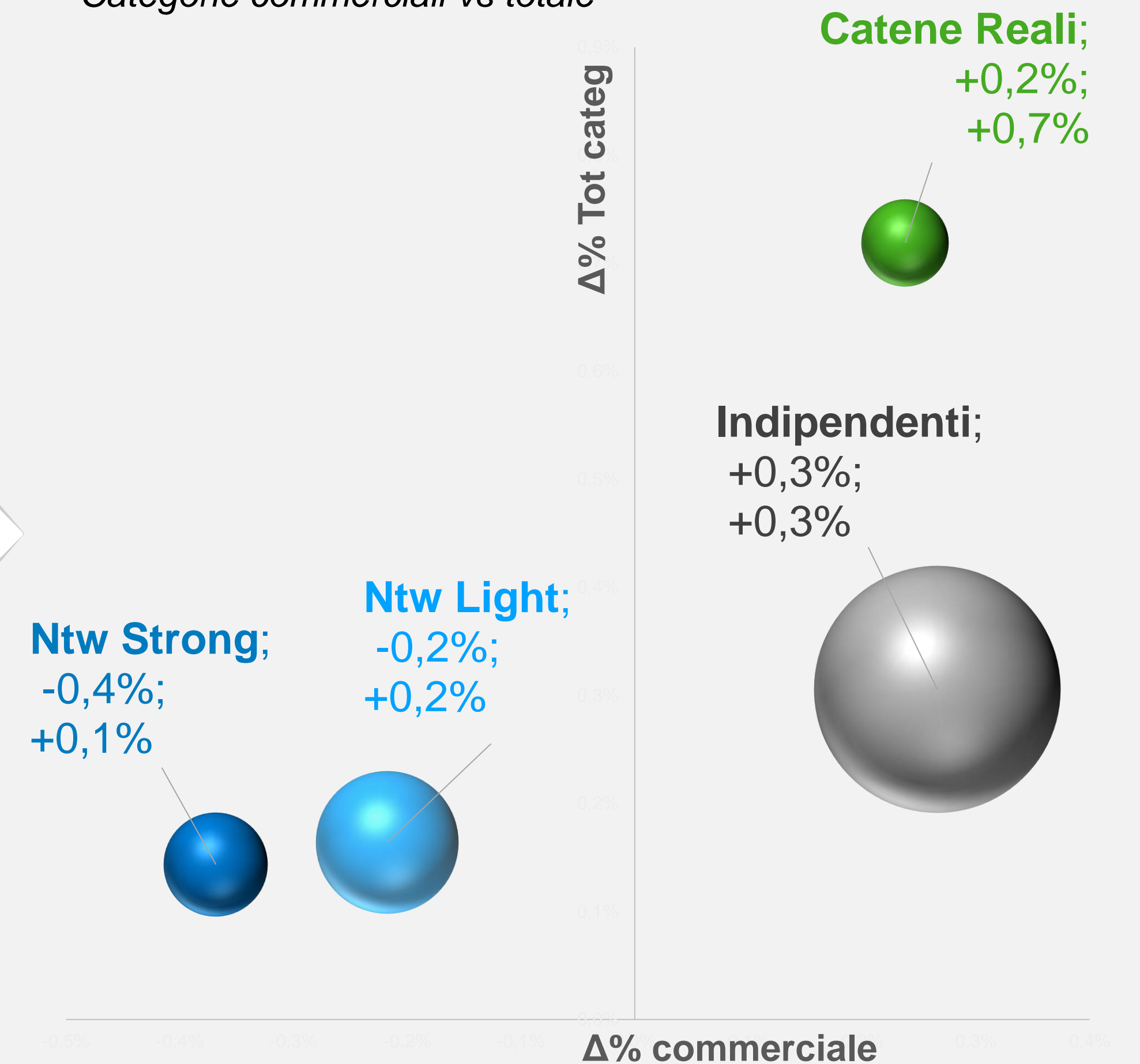
Comprendere il *category management* spinge un cambio di strategia, il prezzo medio aumenta nelle reali

7 aree su cui sviluppare una strategia di catena

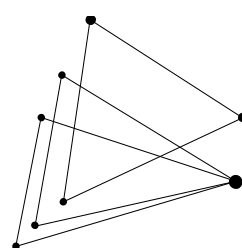


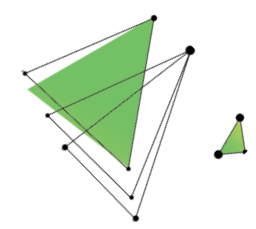
VARIAZIONE PREZZO MEDIO*

Category commerciali vs totale



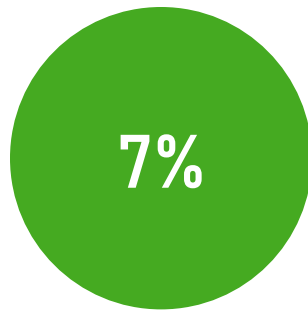
* Prezzo come rapporto valore/unità (etico + commerciale)





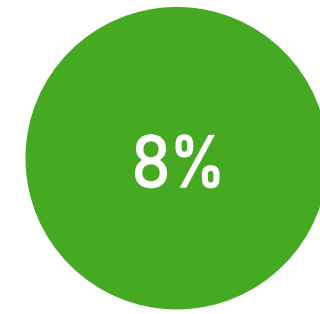
Farmacie più grandi in «catena», ma al momento la marca commerciale non rappresenta una spinta per le vendite

Market Share
in numerica

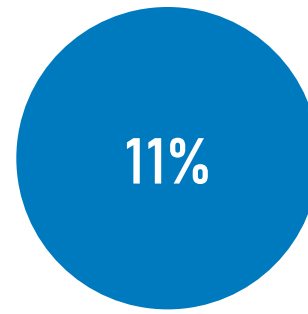


**CATENE
REALI**

Market Share
in valore

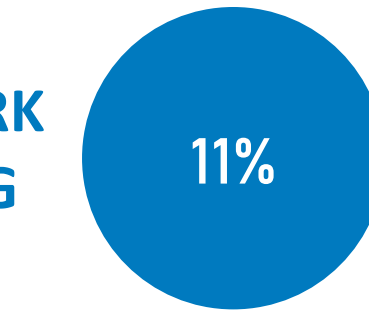


Market Share
in numerica



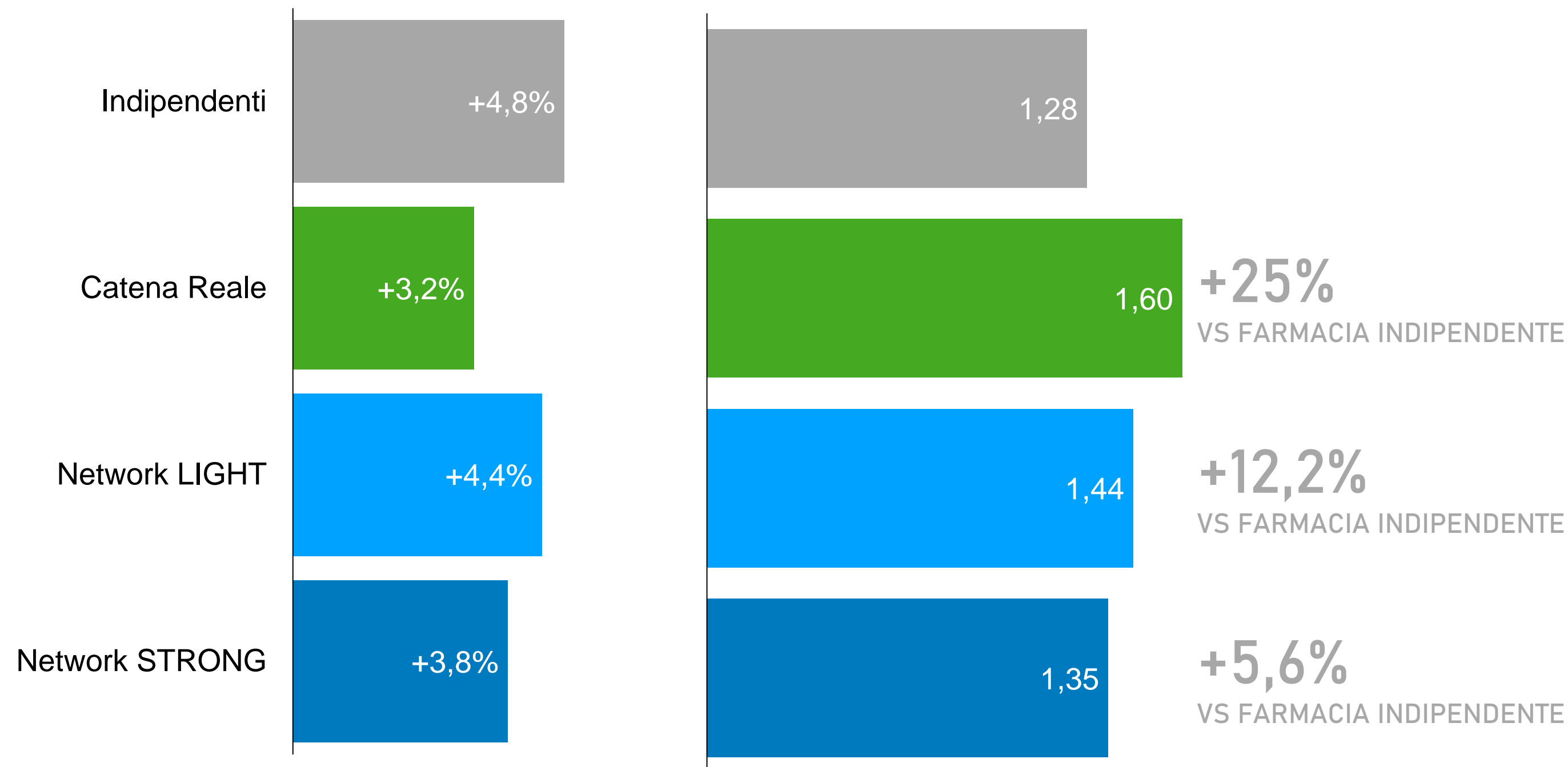
**NETWORK
STRONG**

Market Share
in valore



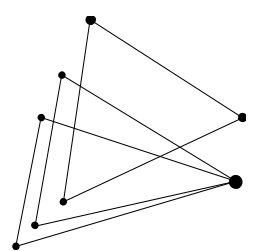
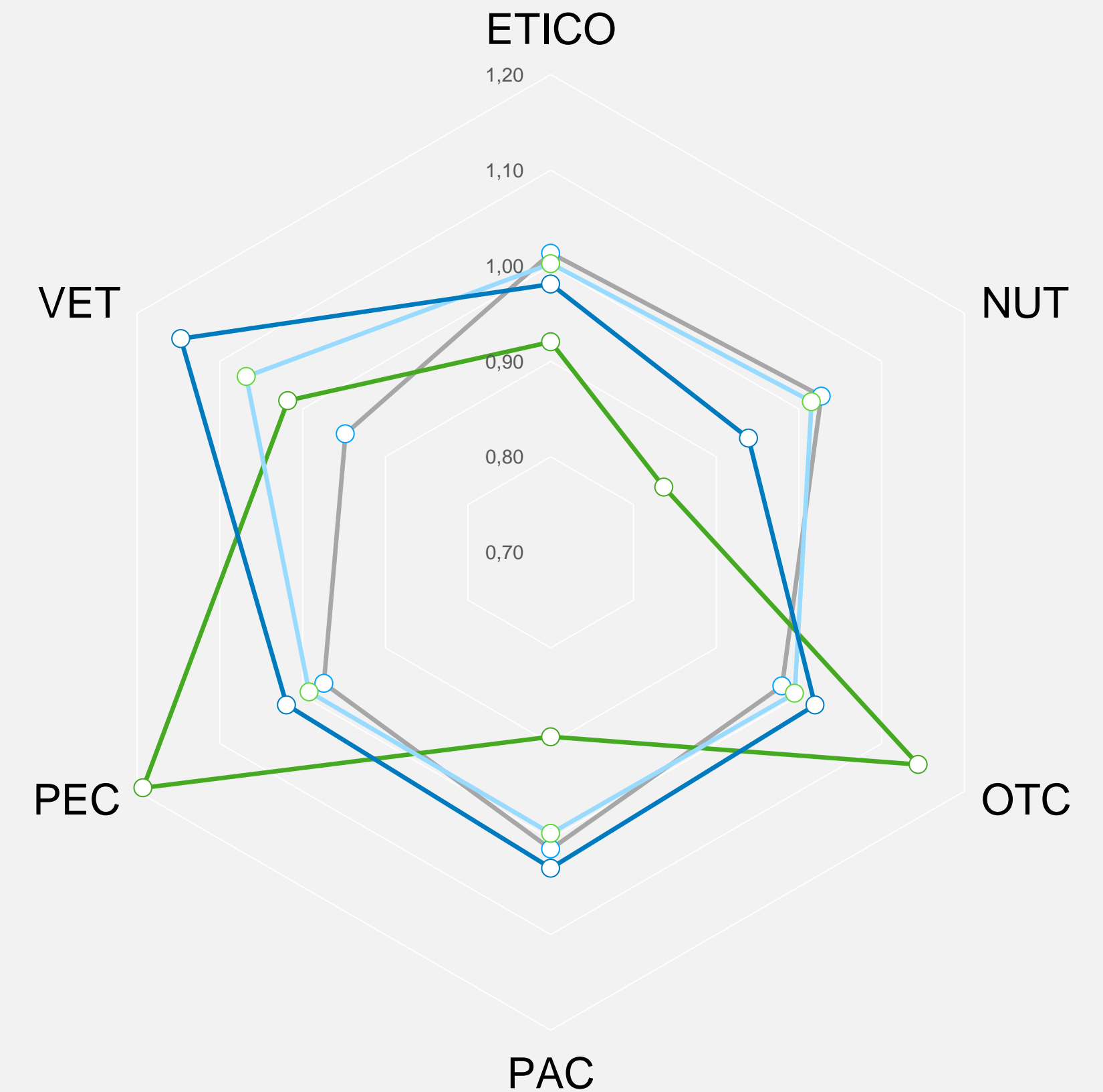
Crescita a valore 2022 vs 2021

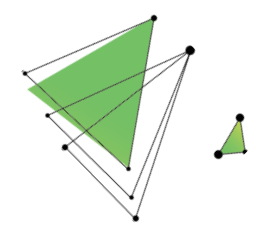
Fatturato medio 2022 (mln€)



Differente mix categorie nelle catene reali

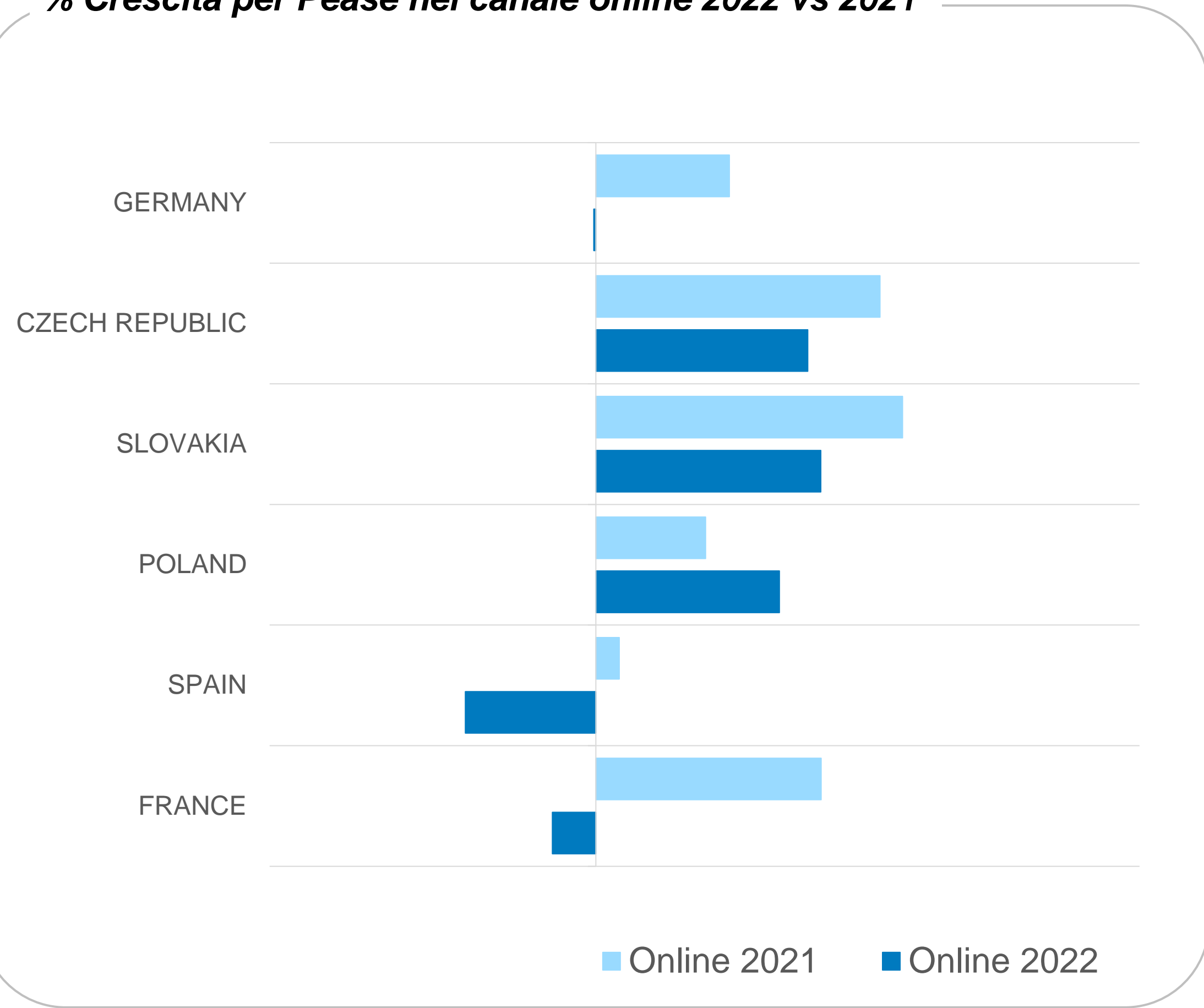
○ Indip ○ Reale ○ Virtuale Light ○ Virtuale Strong





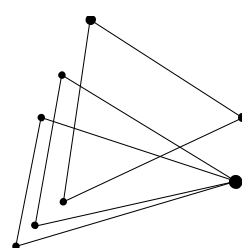
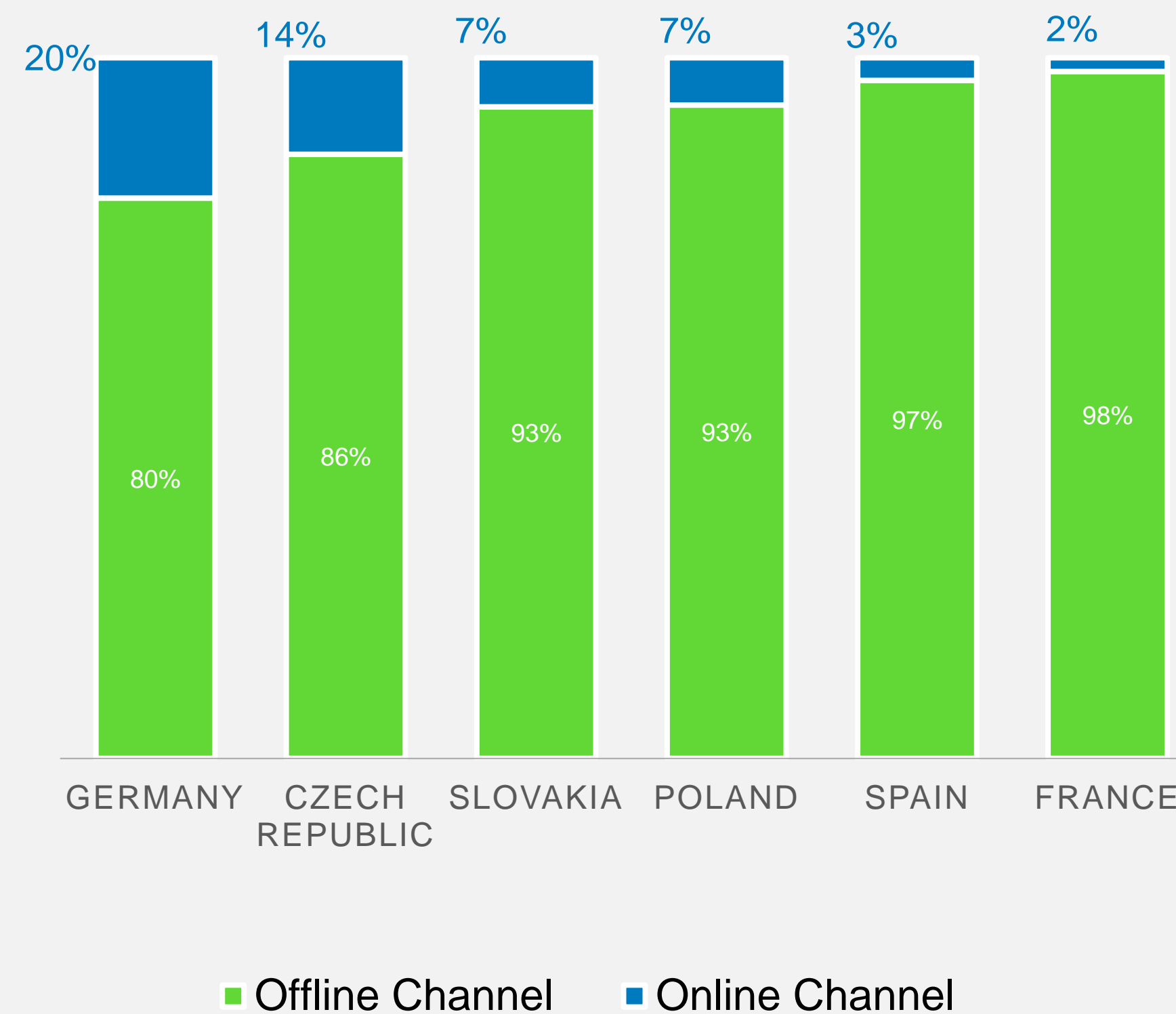
Trend ancora positivo per il canale online in quasi tutti i Paesi europei, anche se in % leggermente inferiori rispetto al 2021

% Crescita per Paese nel canale online 2022 vs 2021



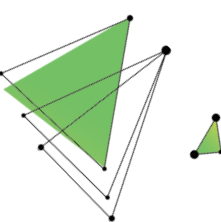
Source: IQVIA CH offline and online Information

Quota 2022 canale online vs offline



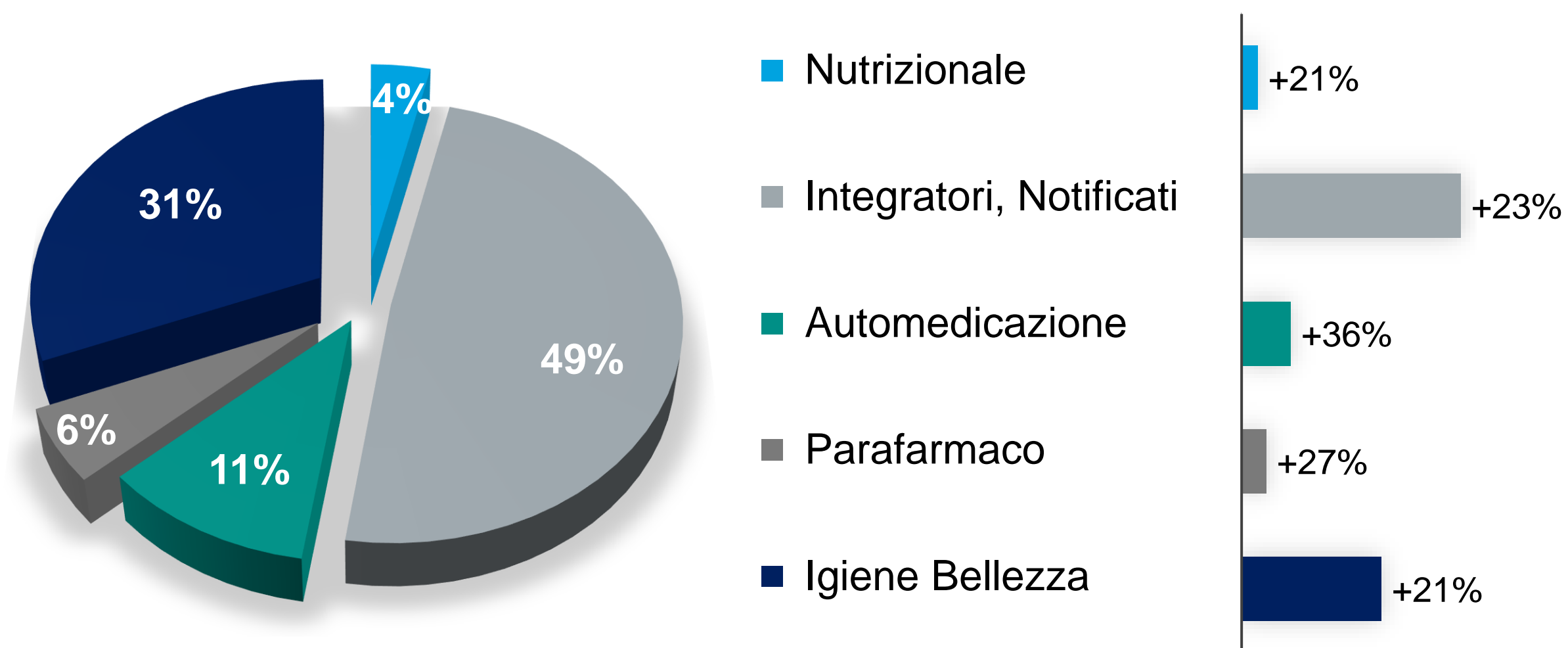
THE NETWORK'S ROAD





Trend ancora positivo per il canale online, ma il prezzo medio è costante per integratori e personal care. Il driver di acquisto principale si conferma la convenienza

Fatturato 673 mln€
FY 2022



1.400+

punti vendita autorizzati

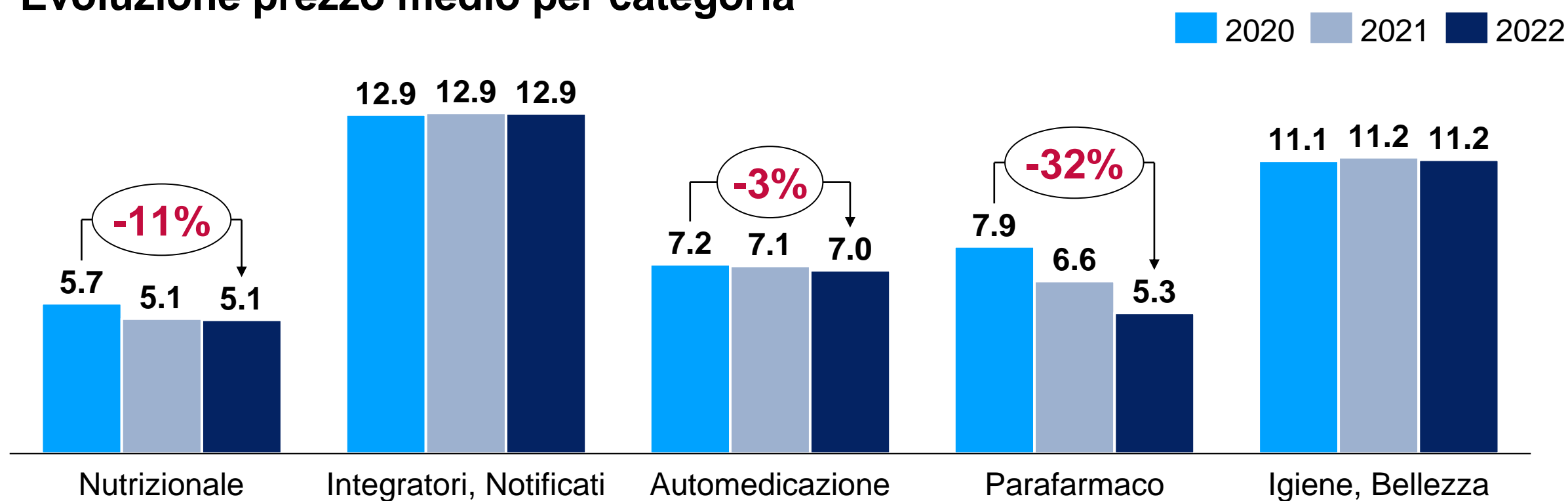
45%

quota dei **Top5** e-Retailer

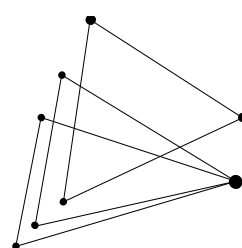
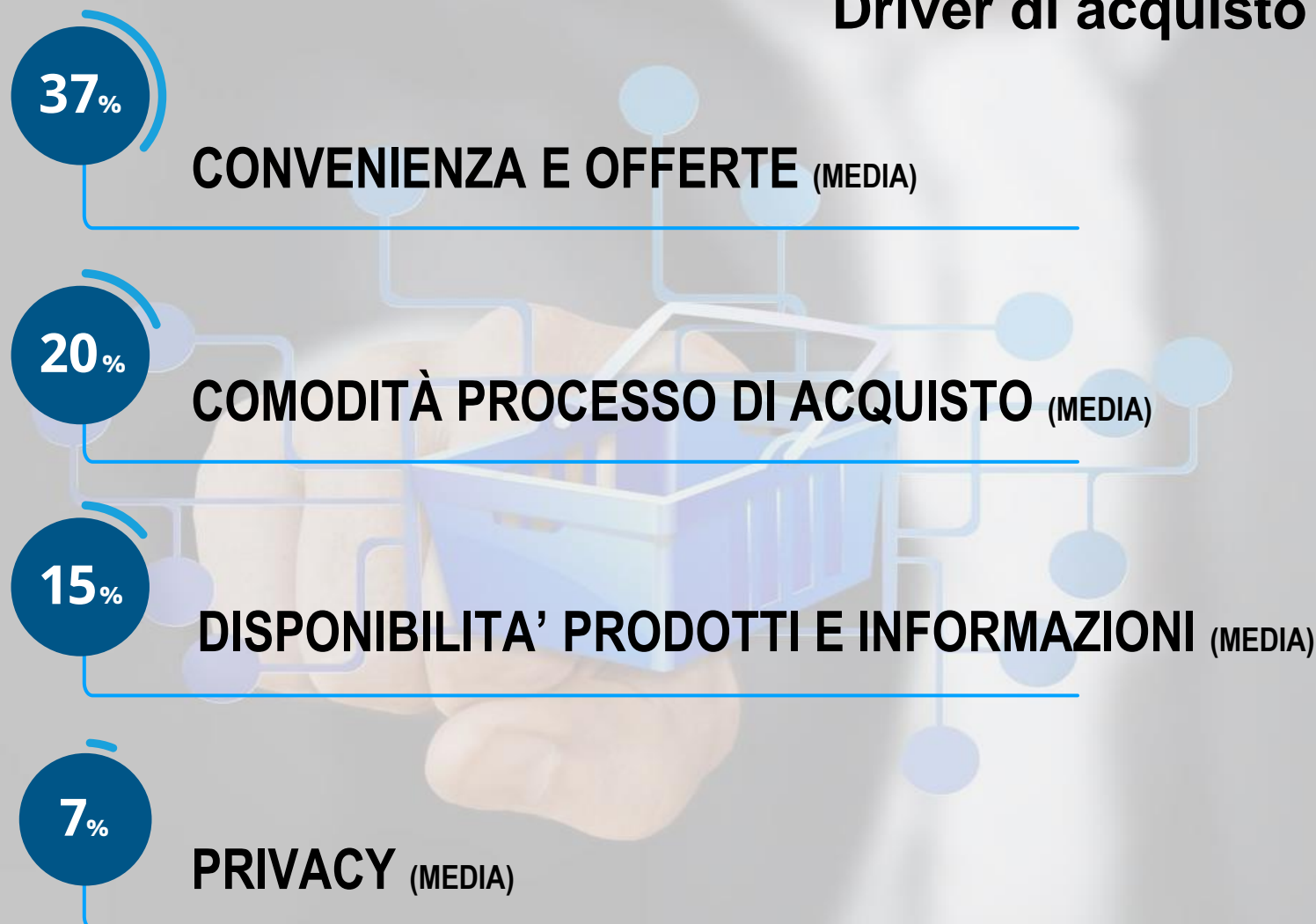
53%

quota dei **Top10** e-Retailer

Evoluzione prezzo medio per categoria



Driver di acquisto





Grazie



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