Pharmacy Show

11-12 October 2026 • NEC Birmingham

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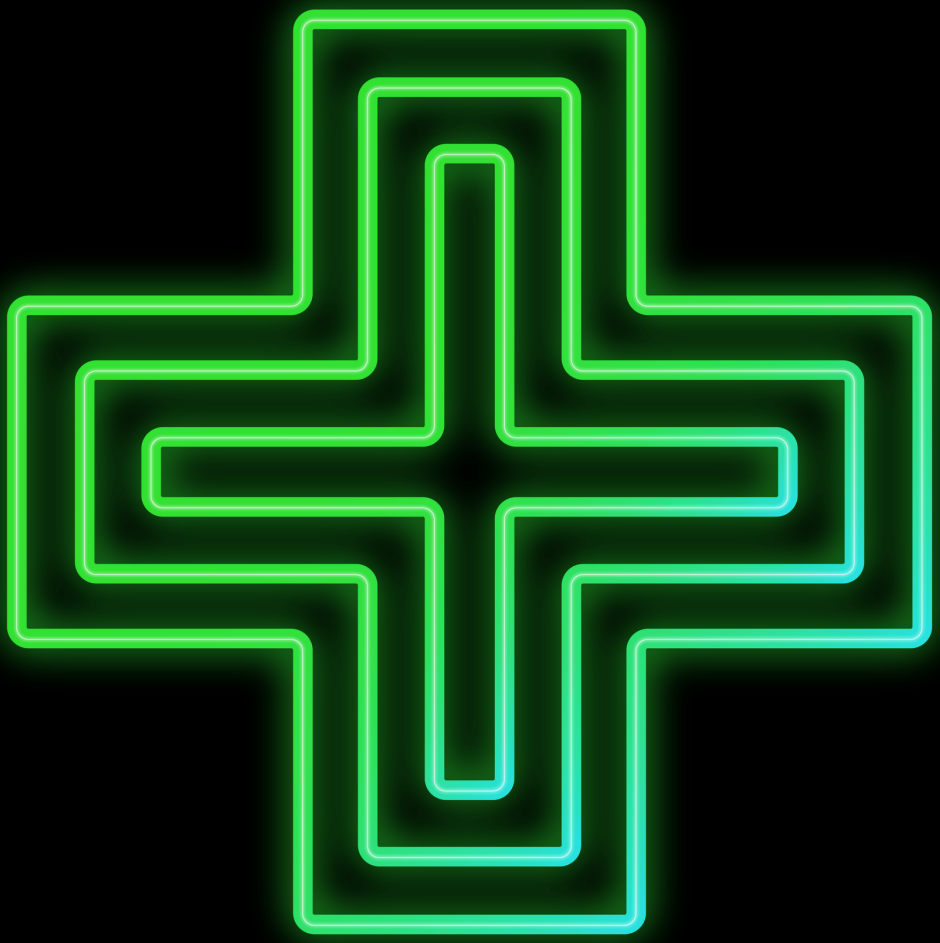

AN OVERVIEW OF THE UK COMMUNITY PHARMACY LANDSCAPE 2026

EXECUTIVE SUMMARY

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The UK community pharmacy remains a large and essential part of the healthcare system, with 12,448 registered pharmacies across the UK and a workforce of 95,613 pharmacy professionals. However, the sector is undergoing rapid structural change. Ownership is shifting away from larger groups towards independents and small operators. In England, small independents owning 1–5 pharmacies now represent the largest part of the market, reflecting a more fragmented ownership landscape.

Community pharmacy faces sustained pressure from funding constraints, rising operating costs, workforce shortages, medicines supply issues and growing prescription demand. These challenges are affecting service capacity, patient waiting times and staff wellbeing, while also increasing pressure on operating models across the sector.

At the same time, the sector has clear growth opportunities through Pharmacy First, the expansion of clinical and private services, wider use of digital tools such as EPS, EPTS and the NHS App, and the transition to a workforce that increasingly includes independent prescribers. For pharmacies and suppliers, the sector is becoming more service-led, digitally enabled and clinically focused, creating opportunities for those able to combine operational resilience with innovation and patient access.



MARKET AT A GLANCE

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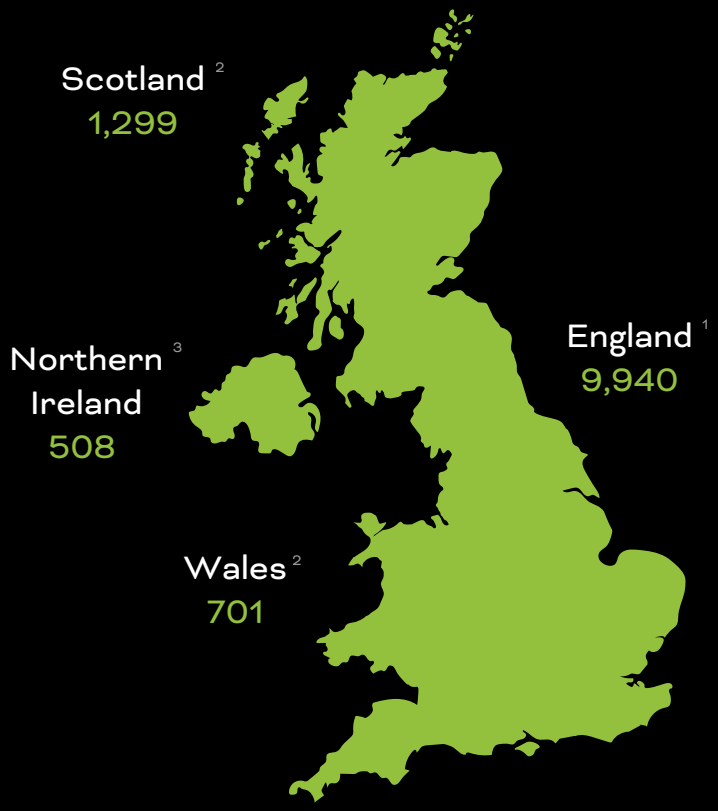
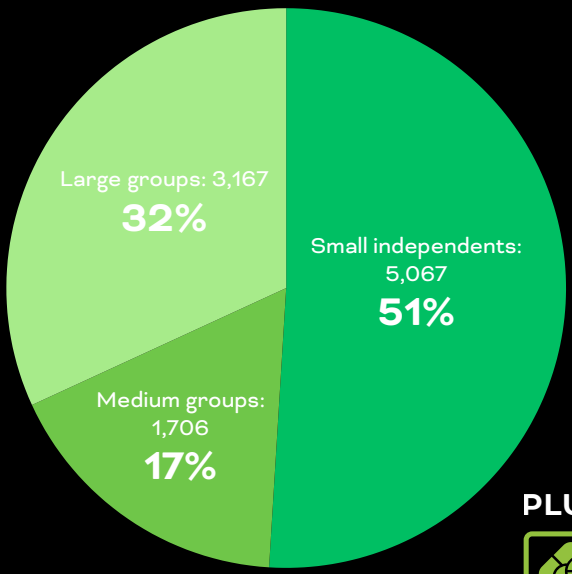
12,448

REGISTERED PHARMACIES IN THE UK





PHARMACY MARKET SHARES IN ENGLAND BY SIZE [1]

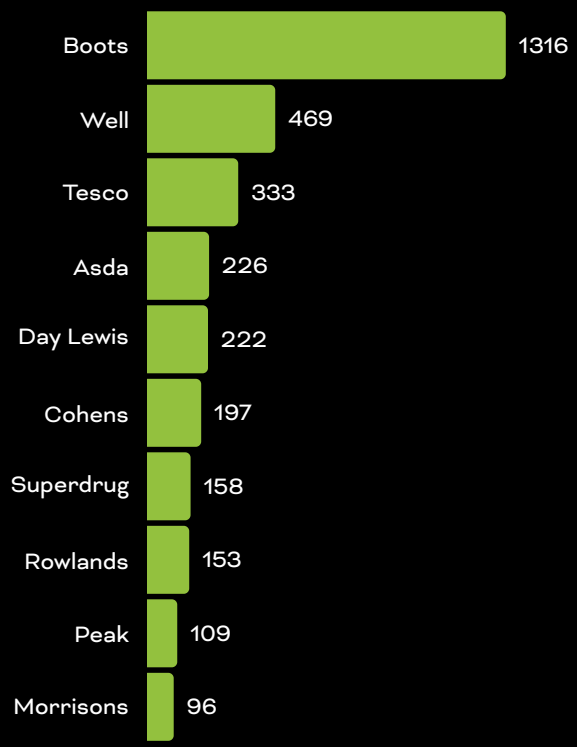


PLUS

454 [1]

online pharmacies

TOP MULTIPLE OPERATORS [4]



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HOW IS THE LANDSCAPE CHANGING?

In 2026, we have seen a shift in the balance of ownership, the publication of the independent economic review, and delayed arrangements for the 2026/27 Community Pharmacy Contractual Framework (CPCF), alongside new graduates qualifying with independent prescriber annotations. This is set against a backdrop of political, economic, societal, and technological changes that are evolving at a rapid pace.

At the end of April 2026, there were 9,940 community pharmacies in England (excluding the 454 distance-selling pharmacies), a decrease of 44 YoY and a drop of 897 compared to January 2021. Reported drivers of these closures include inadequate funding, rising operating costs, and difficulties recruiting and retaining community pharmacists.

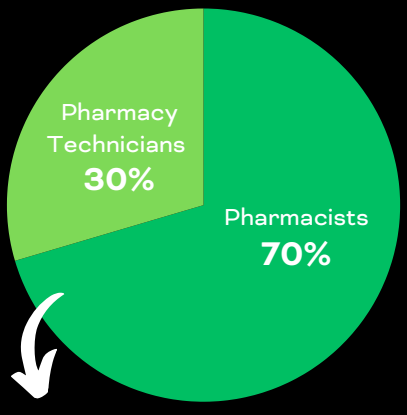
Comparing pharmacy market shares in England between now and the beginning of 2021, the largest proportion of the sector has shifted to small independents. With 5,067 owning 1–5 pharmacies (51% of the market share), this demonstrates an increase of 1,043 pharmacies. Medium-sized groups owning 6–99 pharmacies are now at 1,706 (17% market share), demonstrating an increase of 113. Larger groups owning 100 or more pharmacies are now at 3,167 (32% of the market share), demonstrating a decrease of 2,053. Distance-selling pharmacy numbers have increased by 85, bringing the number from 369 to 454.

There are more registered pharmacy professionals in the UK than in 2021, with numbers increasing from 86,066 to 95,613, representing a growth of 11%. One of the major changes for 2026 is that the sector will see its first cohort of newly-qualified graduates entering community pharmacy, already with independent prescribing abilities. This will inevitably lead to changes in workforce adjustments for both employers and employees.

NUMBER OF PHARMACY PROFESSIONALS IN THE UK [2]

95,613

REGISTERED PHARMACY PROFESSIONALS



of which 38% of registered pharmacists with a prescribing annotation (25,866)

67,339

REGISTERED PHARMACISTS

- England 57,064
- Scotland 5,734
- Wales 2,827
- Northern Ireland and Others 1,714

28,274

REGISTERED PHARMACY TECHNICIANS

- England 23,538
- Scotland 2,712
- Wales 1,830
- Northern Ireland and Others 194

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WHAT ARE THE KEY CHALLENGES FACING COMMUNITY PHARMACY?

CONTRACTUAL CHANGES

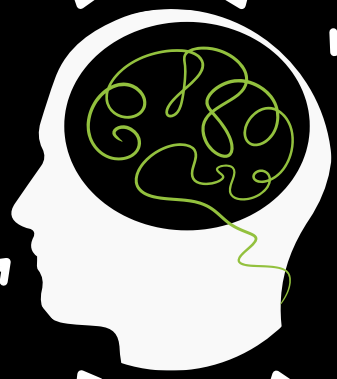
Following delays, the CPCF for 2026/27 was announced on 29 May 2026, outlining a 10.3% funding uplift for the sector (£3.636b) Other headline takeaways included confirmation that independent prescribing will be added to Pharmacy First and PCS, Single Activity Fee increases, medicine margin increases, training closure flexibilities, and late claims processes, amongst other new changes.

FINANCIAL PRESSURES

Despite the uplift outlined in the newly-announced contract, the sector will still face funding pressures including rising operating and staffing costs and tight dispensing margins. Over the next 12 months, 45% expect cash flow to be their biggest challenge, followed by 41% who cite staff and energy costs. The increase in employers National Insurance and National Minimum Wage from April 2025 will have a significant increase in staff costs, particularly where part-time staff are used.

NEW TECHNOLOGY

The rapid pace of technological change can be daunting and requires significant investment. First-time buyers and small independents may not have adequate funds to adapt to new technologies.



MEDICINES SHORTAGES

Whilst the 2026/27 contract increases the retained medicines margin allowance by £200m to £1.1bn, writes off up to £239m of historic margin over-delivery, and commits to further work on medicines supply issues and margin distribution, shortages still present anxieties particularly with ongoing conflict in the Middle East worsening disruption.

WORKFORCE SHORTAGES AND WORKLOAD

Workforce shortages continue to affect service delivery, with 60% of pharmacy teams reporting staffing gaps and 54% of pharmacy owners struggling to recruit permanent staff. The impact is being felt by patients, with 81% of pharmacy staff reporting longer waiting times and 57% saying they have less capacity to provide advice and services. At the same time, workload has continued to rise: the CCA noted that the number of NHS prescription items dispensed has increased by 16% since 2015/16, reaching 1.16 billion in 2024/25.

LIMITED RESOURCES

Even with the new contract offering a monthly 4-hour closure for pharmacies to dedicate to staff learning and development, some pharmacies may not have the expertise in-house to ensure strong financial and operational resilience.

... AND MORE

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WHAT DOES THIS MEAN?

Community pharmacy continues to evolve rapidly, with significant change across the sector each year. Despite ongoing challenges, there are positive signs of confidence: in 2025, 31% of pharmacies were sold to first-time buyers, while 41% were acquired by independent operators or small multiples, according to Christie & Co's Business Outlook 2026.

Whether you are a pharmacy owner, supplier, pharmacy professional, or part of the wider community pharmacy workforce, these shifts highlight that meaningful opportunities remain across the sector.

1. GROWTH IN PRIVATE SERVICES AND COMMERCIAL EXPANSION

The community pharmacy sector is seeing significant growth in services and a shift towards private provision and commercial reinvention. Between 2021 and 2025, pharmacy services increased by 300%, rising from 7.5 million to 25 million, alongside a 25% increase in dispensed prescription items over the past decade.

The new 2026/27 CPCF settlement will support this expansion with a £200m uplift to the retained margin, a write-off of net over-delivery of contract funding up to £239m, and an increase in the Single Activity Fee by 6p.

Looking ahead, growth is expected to continue, with 59% anticipating increased dispensing of weight loss medications, 63% expecting expansion in private services, 52% predicting growth in Pharmacy First, and 45% forecasting further increases in dispensing volume.

This shift creates clear opportunities: by investing in the extension of key services, pharmacies can meet patient demand while also diversifying and strengthening their income streams.



2. PHARMACY FIRST AND SERVICE EXPANSION

Pharmacy First was introduced in January 2024, enabling pharmacists to supply prescription-only medicines for seven common conditions: sinusitis, sore throat, earache, infected insect bites, impetigo, shingles and uncomplicated urinary tract infections in women. The service also incorporates the previously established Community Pharmacist Consultation Service (CPCS), allowing for urgent repeat prescription supply and the treatment of a broader range of minor illnesses.

Between February 2024 and October 2025, the NHS Business Services Authority reported that 4.5 million Pharmacy First consultations were completed, with medicines supplied in 3.5 million cases. By October 2025, participation had expanded to 10,900 pharmacies. Funding for it will continue, as outlined in the 2026/27 CPCF, reflecting its growing role in improving patient access and reducing pressure on GP services.

For pharmacies, Pharmacy First represents a significant shift towards a more service-led and clinically focused model. It creates new revenue streams while increasing patient footfall and strengthening the role of pharmacists as first points of care. For suppliers, it drives demand for a broader range of treatments linked to minor conditions and supports opportunities in training, digital tools and service enablement. Overall, the service reinforces the move towards integrated primary care delivery and highlights the growing commercial and clinical value of community pharmacy.

OPPORTUNITIES

3. ENHANCING PRESCRIPTION EFFICIENCY AND DIGITAL ENGAGEMENT

With growing prescription demand, the Electronic Prescription Service (EPS) is now firmly established across primary care, with over 95% of prescriptions in England issued electronically. EPS allows prescriptions to be sent digitally from prescribers directly to pharmacies and onward to the NHSBSA for reimbursement, streamlining workflows, simplifying payment processes and reducing administrative burden. It also improves safety by removing the risk of misread handwriting, helping to reduce dispensing errors, while enabling real-time tracking of prescriptions.

Building on this, the Electronic Prescription Tracking Service (EPTS) gives patients greater visibility over their prescriptions. When enabled, EPTS allows patients to check the status of their prescriptions directly through the NHS App, reducing the need to contact pharmacies for updates and supporting smoother communication between patients, prescribers and pharmacy teams. By providing timely and accessible information, it helps reduce frustration, improve transparency and enhance the overall experience of accessing medicines. Pharmacies with EPTS enabled are encouraged to promote the feature to help more patients benefit.

The shift also presents clear opportunities for suppliers. According to the Pharmacy Show pre-show survey, 30% of respondents expressed interest in engaging with healthcare app providers, indicating strong demand for digital solutions. This creates an opportunity for suppliers to showcase innovative tools that enhance patient engagement, streamline workflows and support pharmacies in delivering digitally enabled care.



4. CHANGE IN THE DISTANCE SELLING PHARMACIES

In June 2025, the government amended the National Health Service (Pharmaceutical and Local Pharmaceutical Services) Regulations 2013, introducing a ban on new applications for pharmacies intending to provide NHS services exclusively online. With around 400 distance selling pharmacies already in operation, this was considered sufficient for current demand. The change aims to curb the rapid expansion of online-only models, safeguard access to face-to-face pharmacy services in local communities, and maintain a balanced mix of digital and in-person care.



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5. EXPANDING ROLE OF PHARMACY PROFESSIONALS: INDEPENDENT PRESCRIBING

As outlined in the 2026/27 CPCF, a national NHS independent prescribing offer will launch from autumn 2026.

Sitting within Pharmacy First and PCS, with up to five new prescribing-only pathways expected to be added, pharmacies delivering the new IP offer will receive a one-off £500 set-up fee and a £525 monthly infrastructure fee. Whilst there does remain some uncertainty in the sector as to how this expansion will be rolled out, the direction of travel is clear.

Independent prescribing is increasingly being viewed as a key enabler of the government's ambition to shift more care into community settings, improve access to treatment, and reduce pressure on GP services.

Combined with the arrival of the first cohort of pharmacist independent prescribers graduating in 2026 and the outcomes of the recent IP Pathfinder pilots, the new investment may encourage more ICBs to commission prescribing services locally, creating new opportunities for community pharmacies to expand their clinical role and generate additional service income.





6. MENTAL HEALTH AND WELLBEING

Mental health and wellbeing remain significant concerns within the community pharmacy workforce. According to a survey by the Pharmacists' Defence Association (PDA), more than 40% of pharmacists reported that their work significantly harms their wellbeing. Despite this, only around one in three pharmacists felt encouraged or supported to discuss wellbeing concerns in the workplace.

The survey highlighted persistent pressures, including heavy workloads, staffing shortages and limited opportunities for rest, with many pharmacists regularly missing breaks or working beyond their contracted hours. It also pointed to gaps in leadership and organisational support: only 20% of respondents believed their line managers were adequately trained to support staff wellbeing, and just one in ten reported seeing meaningful action taken following staff feedback.

For pharmacies, addressing wellbeing through better staffing models, workflow support, training and technology will be critical. For suppliers, there is an opportunity to support pharmacies with solutions that reduce workload pressure, such as automation, digital tools and service support, as well as initiatives that enable staff development and improve working conditions.

FUTURE OUTLOOK

Looking ahead, the UK community pharmacy sector is moving towards a more clinically integrated, service-led and digitally enabled model. The strategic direction of travel is clear: pharmacies will be expected to deliver more patient-facing care, make better use of prescribing capability, adopt digital tools more effectively and operate with greater efficiency in a financially constrained environment. As commissioning evolves, the organisations best placed to succeed are likely to be those that can combine operational resilience with workforce development, service innovation and strong local healthcare partnerships.

For pharmacy owners, suppliers and service partners, this means planning not only for short-term pressure but for long-term capability building and collaboration. The Pharmacy Show, taking place on 11-12 October 2026 at the NEC Birmingham, offers a timely opportunity to strengthen networks, access the latest sector insights, explore new technologies and service models, and meet potential business partners. In a fast-changing market, staying connected to sector thinking and building the right partnerships will be increasingly important to identifying growth opportunities and maintaining competitive advantage.



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