



# North Macedonia Pharmacy Battle Cards

Competitive intelligence briefing for sales teams positioning against Eurofarm Bitola and Viola Skopje in the North Macedonia pharmacy market.

# Market Landscape Overview

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## Major Players

Competing for dominance in North Macedonia's pharmacy sector

60%

## Our Market Share

ZEGIN Farm leads with commanding position

170+

## Our Store Network

Extensive physical presence nationwide

We dominate North Macedonia's pharmacy landscape with unmatched scale, brand recognition, and customer reach. Our competitors operate with different strategies and market positions.



# Competitor #1: Eurofarm Bitola

## Company Profile

- Founded: 2000
- Employees: 500-600
- Revenue: €46.6M (2024)
- HQ: Bitola

## Business Model

Vertical integration with wholesale and retail operations. Exclusive importer for 20+ international brands including Jamieson, Dr. Wolz, and Microlife.

# Eurofarm's Competitive Position

## Strengths

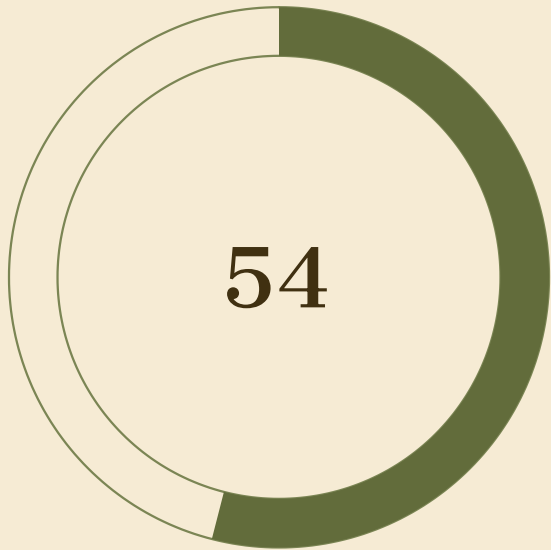
- Exclusive brand partnerships
- ISO-certified processes
- Strong sports sponsorship (HC Eurofarm Pelister)
- Established e-commerce platform

## Weaknesses

- Limited digital innovation
- No loyalty programs
- Smaller physical network
- Higher dependency on brand exclusivity

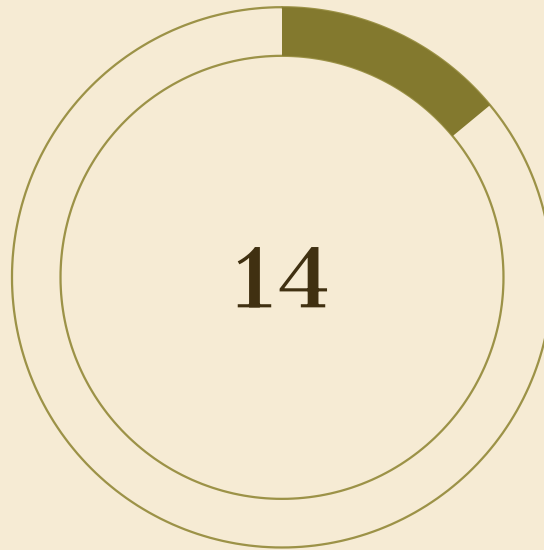
Threat Level: **High** - Significant financial strength and exclusive product access make them our primary competitor.

# Competitor #2: Viola Skopje



**Employees**

Small but focused team



**Store Locations**

Concentrated in Skopje



**2024 Revenue**

Modest but stable growth



# Viola's Market Position

## Local Community Focus

Family-owned business operating since 1992 with integrated wholesale-retail model. Strong neighborhood presence in Skopje with personalized service approach.

## Limited Scale Impact

Significantly smaller than market leaders, representing minimal threat to our dominant position but maintains loyal local customer base.



Threat Level: **Low** - Localized competitor with stable but limited market influence.

# Sales Battle Strategy: Against Eurofarm

1

## Leverage Network Scale

Emphasize our 170+ locations versus their limited physical presence. Highlight convenience and accessibility advantages.

2

## Competitive Pricing Power

Use our market dominance to offer more competitive pricing on comparable products, undermining their exclusive brand strategy.

3

## Digital Innovation Gap

Position our award-winning e-commerce platform and advanced customer service as superior to their basic digital offerings.



# Key Messaging Against Competitors

1

## Market Leadership

"As North Macedonia's pharmacy leader with 60% market share, we deliver unmatched reliability and trust that smaller competitors cannot match."

2

## Accessibility Advantage

"Our 170+ locations nationwide ensure you're never far from professional pharmacy care, unlike limited regional chains."

3

## Innovation Excellence

"Our award-winning digital platform and 30+ years of experience deliver the most advanced pharmacy services in the country."



# Overall Strategy: Outcompeting Key Rivals

To maintain and grow our market leadership, our strategy against Eurofarm and Viola leverages our core strengths while addressing their specific competitive advantages.



## Amplify ZEGIN's Unmatched Scale

Leverage our extensive physical footprint and efficient distribution network for superior accessibility and consistent supply, making us the convenient choice over smaller rivals.



## Accelerate Digital & Service Innovation

Invest in advanced e-commerce, telepharmacy, and personalized health management tools to set a new industry standard and outpace competitors' basic digital presence.



## Cultivate Deep Customer Loyalty

Implement robust loyalty programs, offer competitive pricing on key products, and enhance personalized patient care to retain existing customers and attract new ones.

# Opportunity Assessment

## Short-term

Exploit Eurofarm's digital limitations by enhancing our online customer experience and launching loyalty programs.

1

2

3

## Long-term

Pioneer telepharmacy and AI-driven health services to create insurmountable competitive advantages.

## Medium-term

Consider strategic acquisitions of smaller players like Viola to consolidate market position further.

# Win Strategy Summary

## Emphasize Scale & Trust

Lead with our dominant market position, extensive network, and 30+ years of proven reliability.

## Highlight Innovation Leadership

Showcase our award-winning digital platform and commitment to advancing pharmacy care technology.

## Leverage Competitive Pricing

Use our purchasing power and market dominance to offer superior value propositions.

- ❏ Remember: We're not just competing on products—we're the trusted pharmacy partner that North Macedonia relies on for accessible, professional healthcare.

