



PGEU GPUE

*Pharmaceutical Group of European Union
Groupement Pharmaceutique de l'Union Européenne*





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The Models of Pharmacy in Europe

John Chave, Secretary General



Pharmaceutical Group of European Union

Members: Professional Bodies & Pharmacists' Associations



2013: 32 Countries



Pharmaceutical Group of European Union
Groupement Pharmaceutique de l'Union Européenne

Austria		Malta
Belgium		Netherlands
Bulgaria		Poland
Bosnia Herzegovina		Portugal
Cyprus		Romania
Czech Rep		Slovakia
Denmark		Slovenia
Estonia		Spain
Finland		Sweden
France		United Kingdom
Germany		Croatia
Greece		FYR Macedonia
Hungary		Norway
Ireland		Serbia
Italy		Switzerland
Luxembourg		Turkey

European Pharmacy 2013



FARMÁCIA DE LUTO
Não deixe que a sua farmácia encerre.



The screenshot shows a website for "FARMÁCIA DE LUTO". The header includes a black ribbon logo with a white cross. The menu bar has links for Início, Notícias, Contributos, A Economia da Farmácia, Faça-se ouvir, Reunião Magna, Inscreva-se na newsletter, and Promotores. Below the menu are social media links for YouTube, Twitter, and Facebook. A main heading "REUNIÃO MAGNA DA FARMÁCIA" is followed by several bullet points: "600 farmácias correm o risco de fechar em 2013", "1.131 farmácias com fornecimentos suspensos", "457 farmácias com processos judiciais", "235 milhões de euros de dívida litigiosa", and "40 mil euros de resultado líquido negativo na farmácia média". To the right, there's a "PETIÇÃO" section with links to sign online or at a pharmacy, and a "Petição – portugueses solidários com farmácias" link.







Pill Image

XANAX

Done

Summary

XANAX (2)

4.7/73 XANAX

ALPRAZOLAM

15 Rate this drug!

Indications & Usage

Dosage & Administration

Adverse Reactions

Contraindications

Warnings

Overdosage

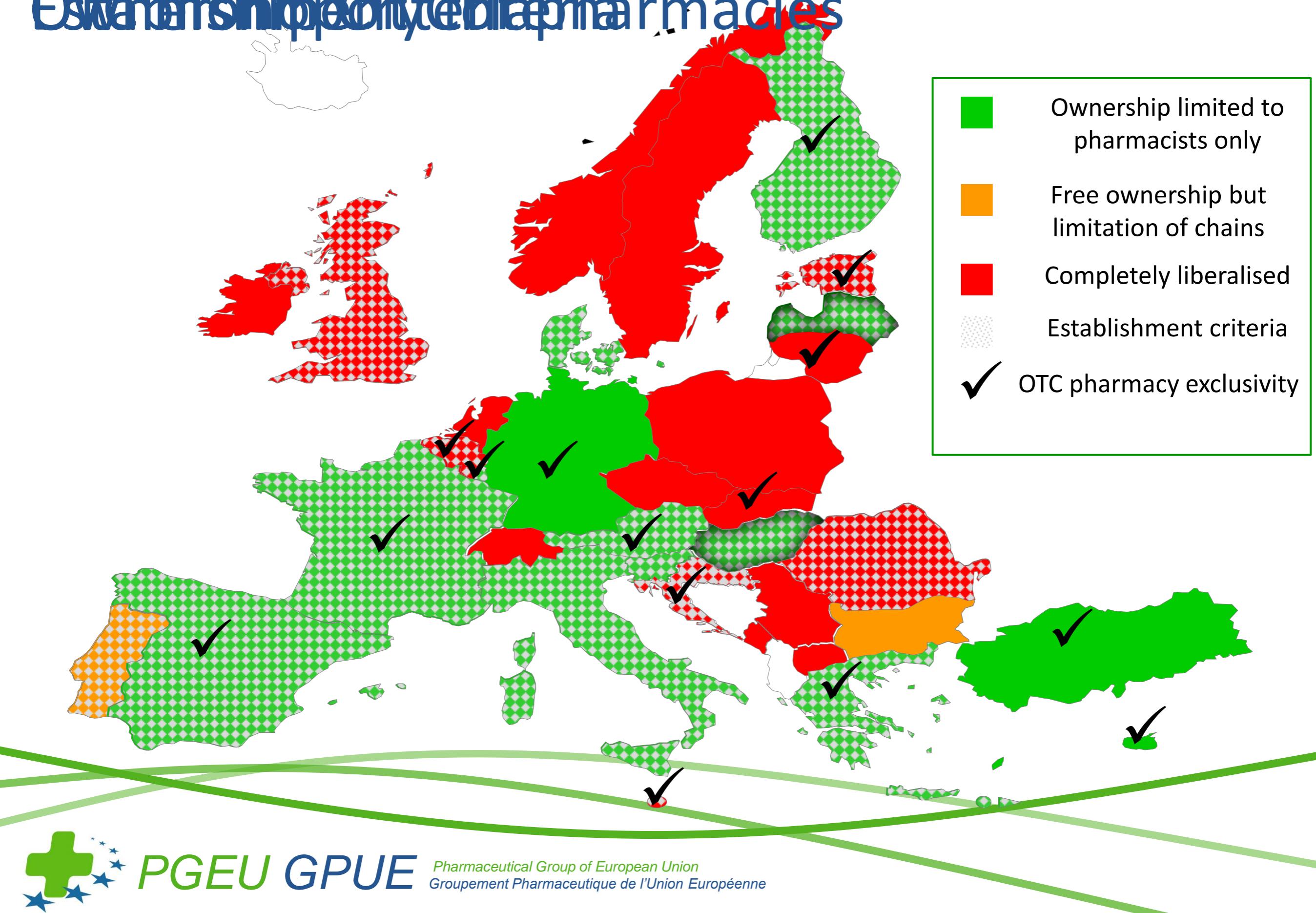
Drugs Share Rx Card Favorites Drug Code

Three Currents of Change

- Liberalisation
- Economic Change
- Professional Change



Establishment criteria for pharmacies

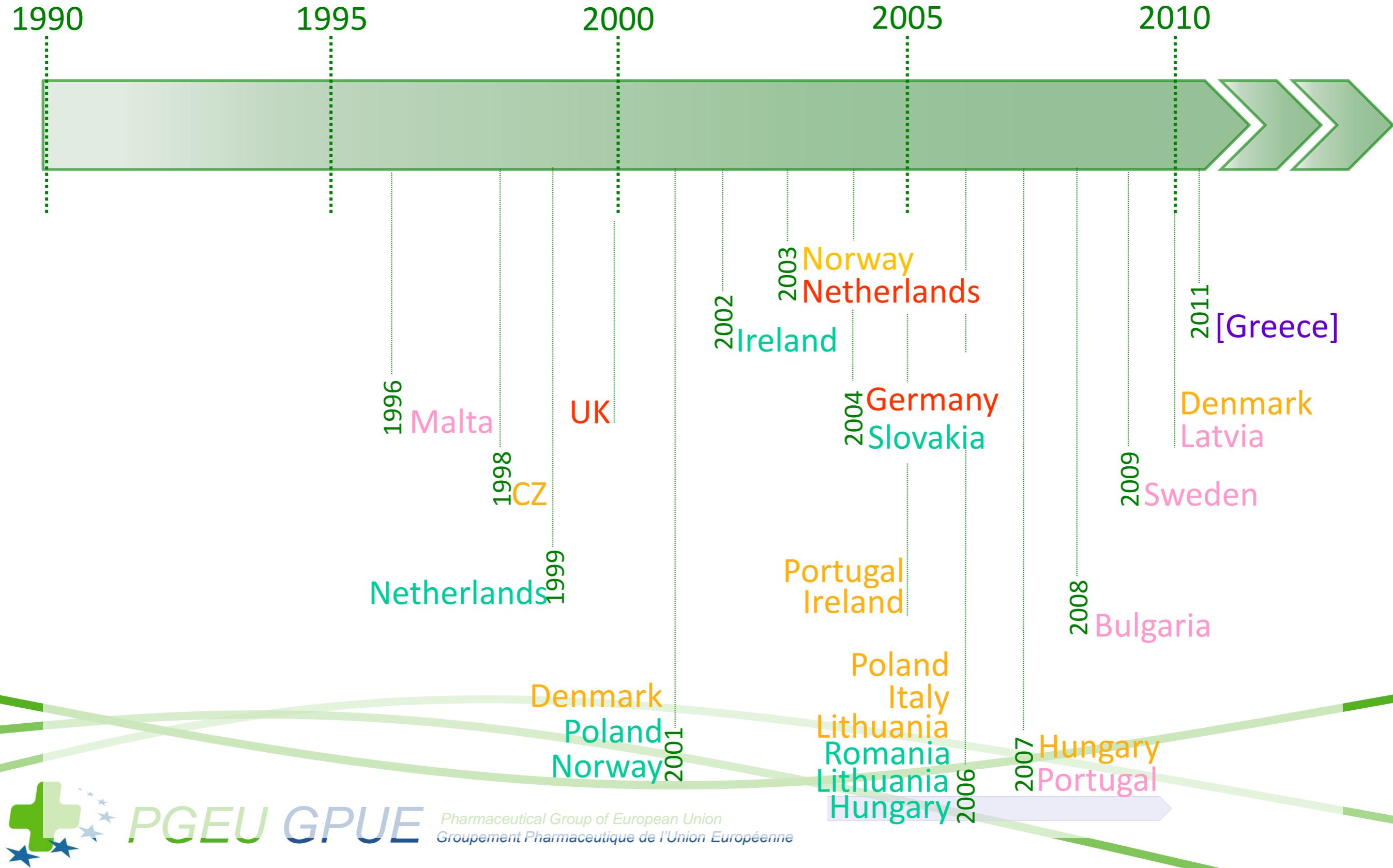


Ownership AND Establishment

Ownership Establishment

NPMs

Internet



The Decisions of the European Court of Justice

- In 2007, The European Commission started legal action against ownership restrictions in Italy and Germany.
- The Commission argued that such restrictions were not compatible with the EU internal market.
- At the same time, the Court considered a legal challenge to pharmacy establishment restrictions in Spain.

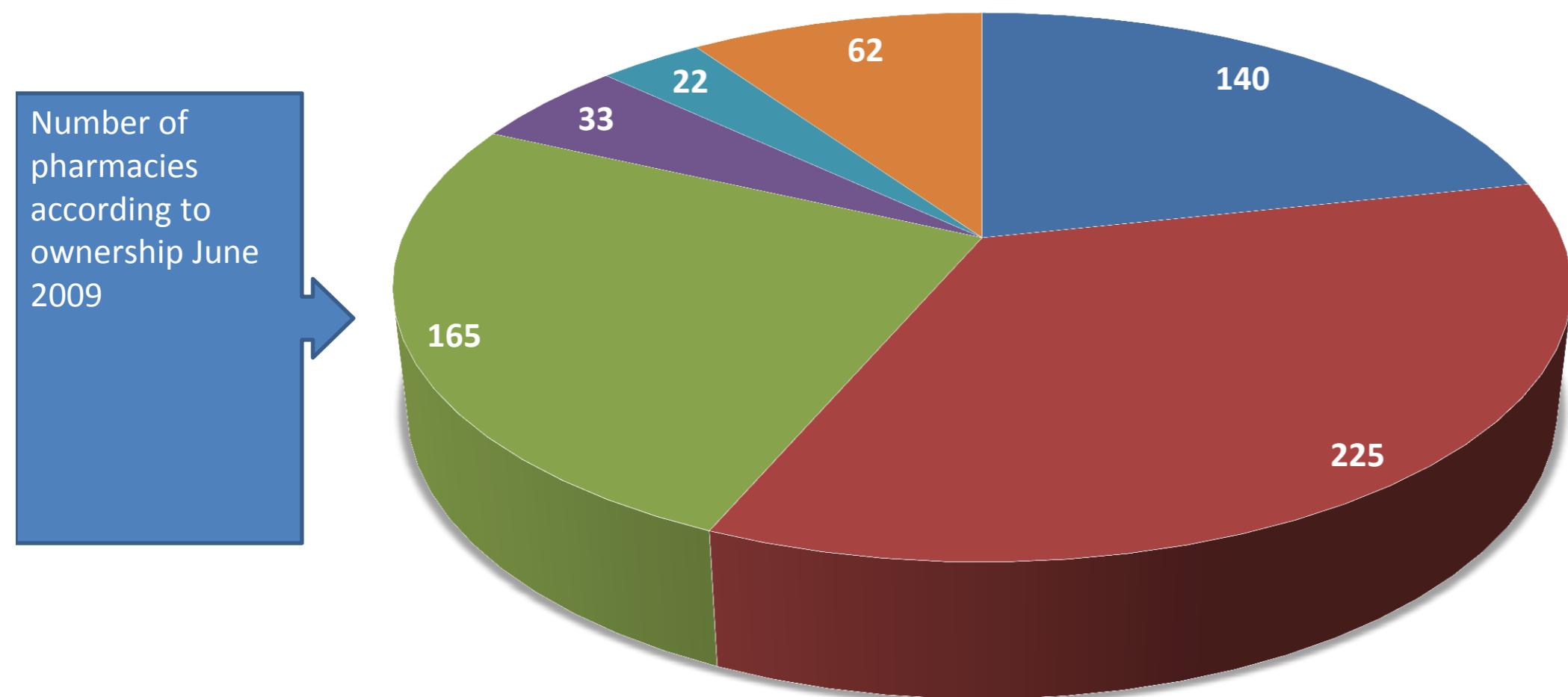


The Decisions of the European Court of Justice

- The Court affirmed the right of EU Member states to restrict ownership of pharmacies to pharmacists;
- The Court argued that ownership restriction was necessary to protect the independence of the pharmacist;
- In a different case, the Court ruled that geographical restrictions on the establishment of new pharmacies were justified in order to ensure an adequate distribution of pharmacies across the territory.

Norway

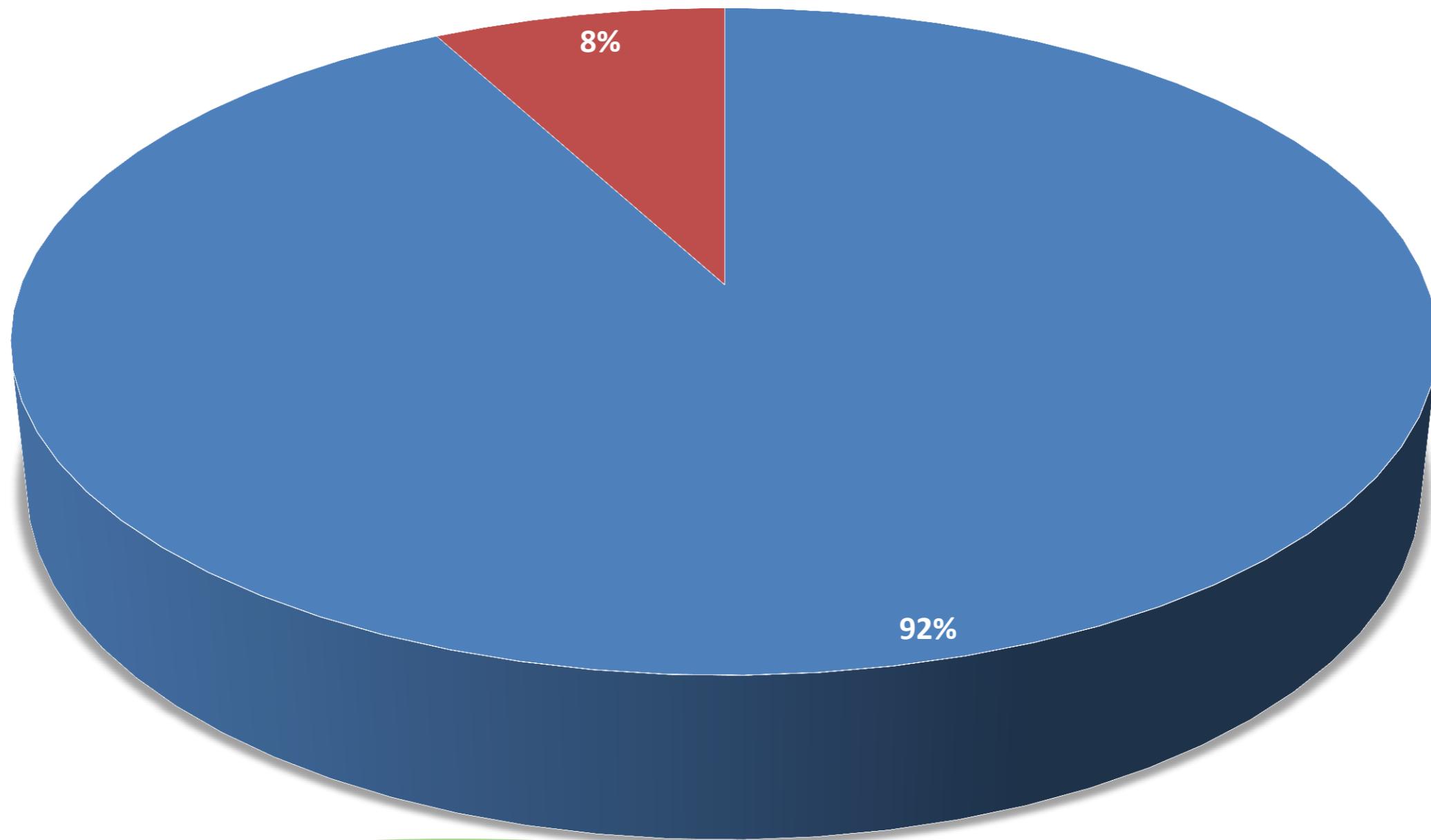
- Alliance apotek / Boots apotek, wholly owned
- Vitusapotek, wholly owned
- Independent pharmacies (no chain connections)
- Apokjeden / Apotek 1, wholly owned
- Public Hospital pharmacies
- Other independent pharmacies with a chain connection



Source: Norwegian Pharmacy Association

Ireland

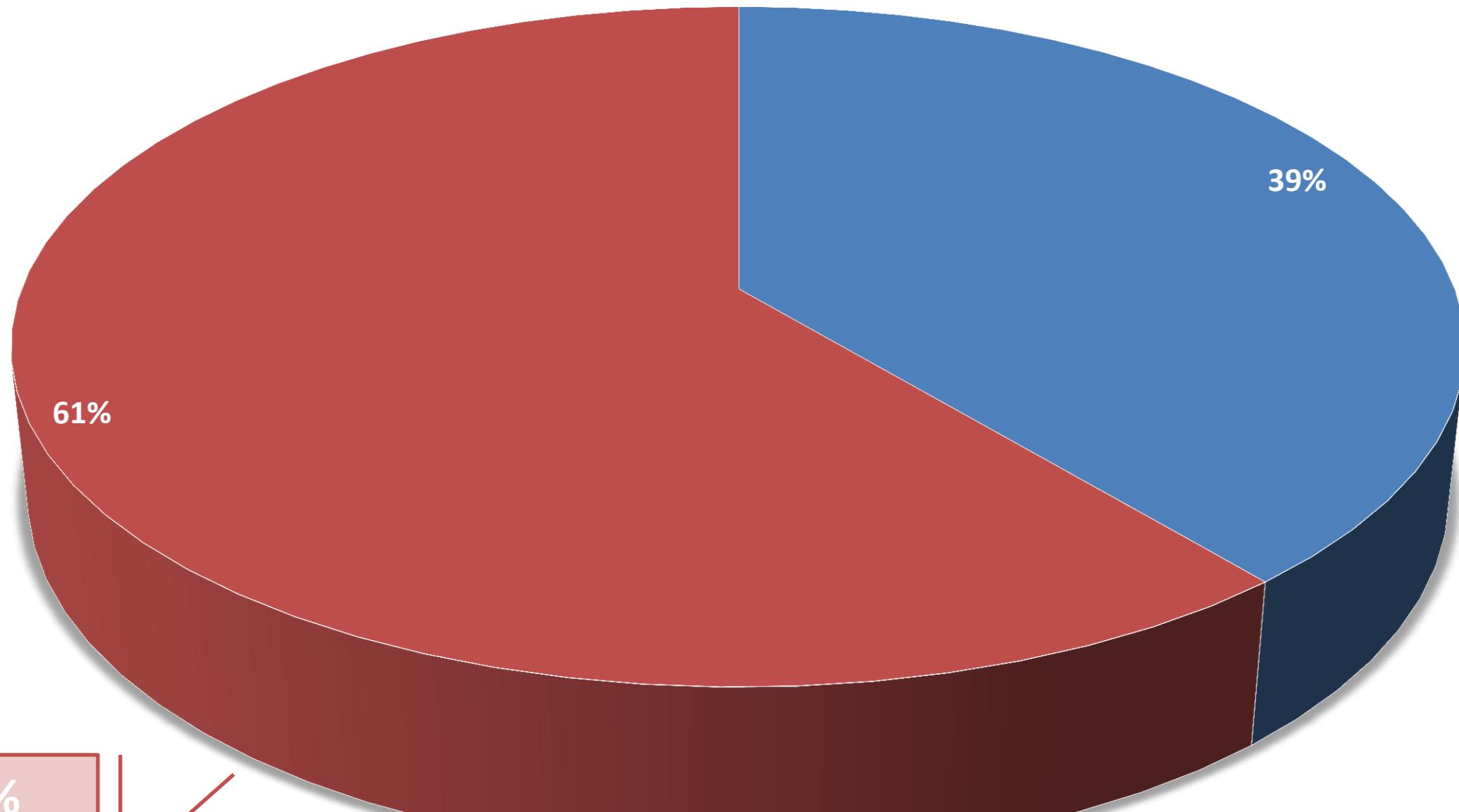
■ Independents and small chains ■ Corporate Chain Ownership



Source: Irish Pharmacy Union

UK

■ Independents ■ Multiples

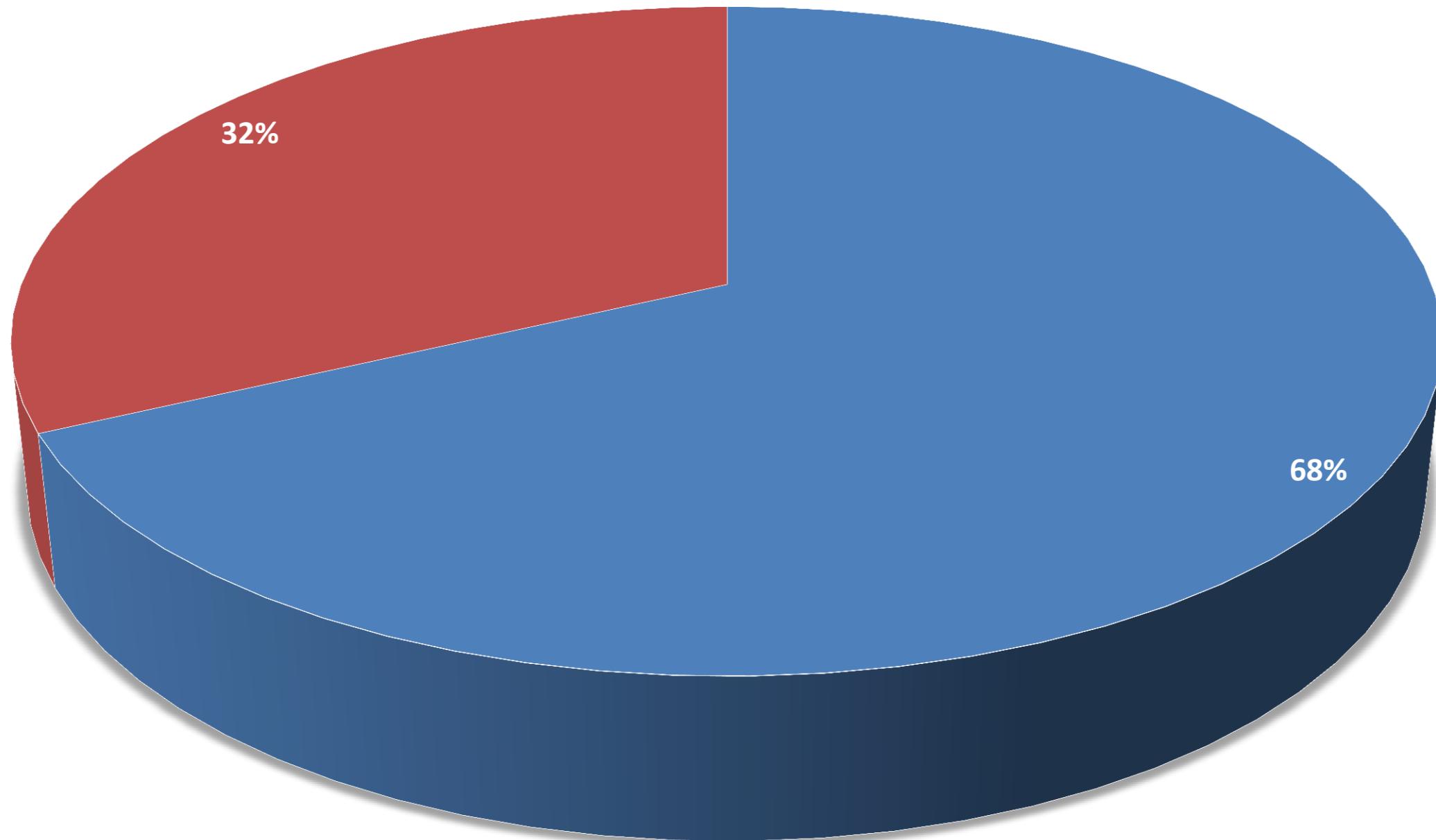


> 2 %
in 4 years



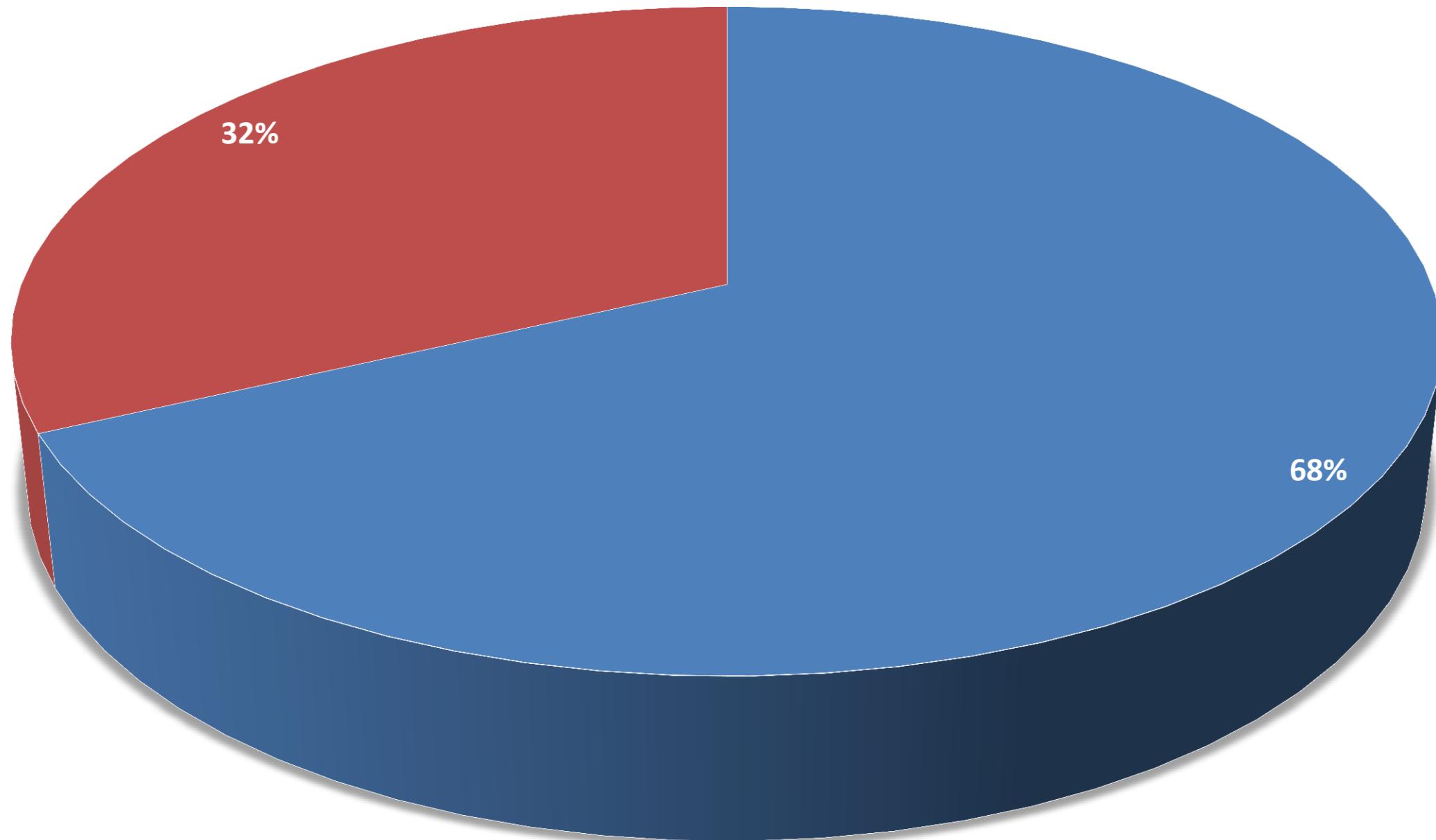
Netherlands

■ Independent ■ Multiples

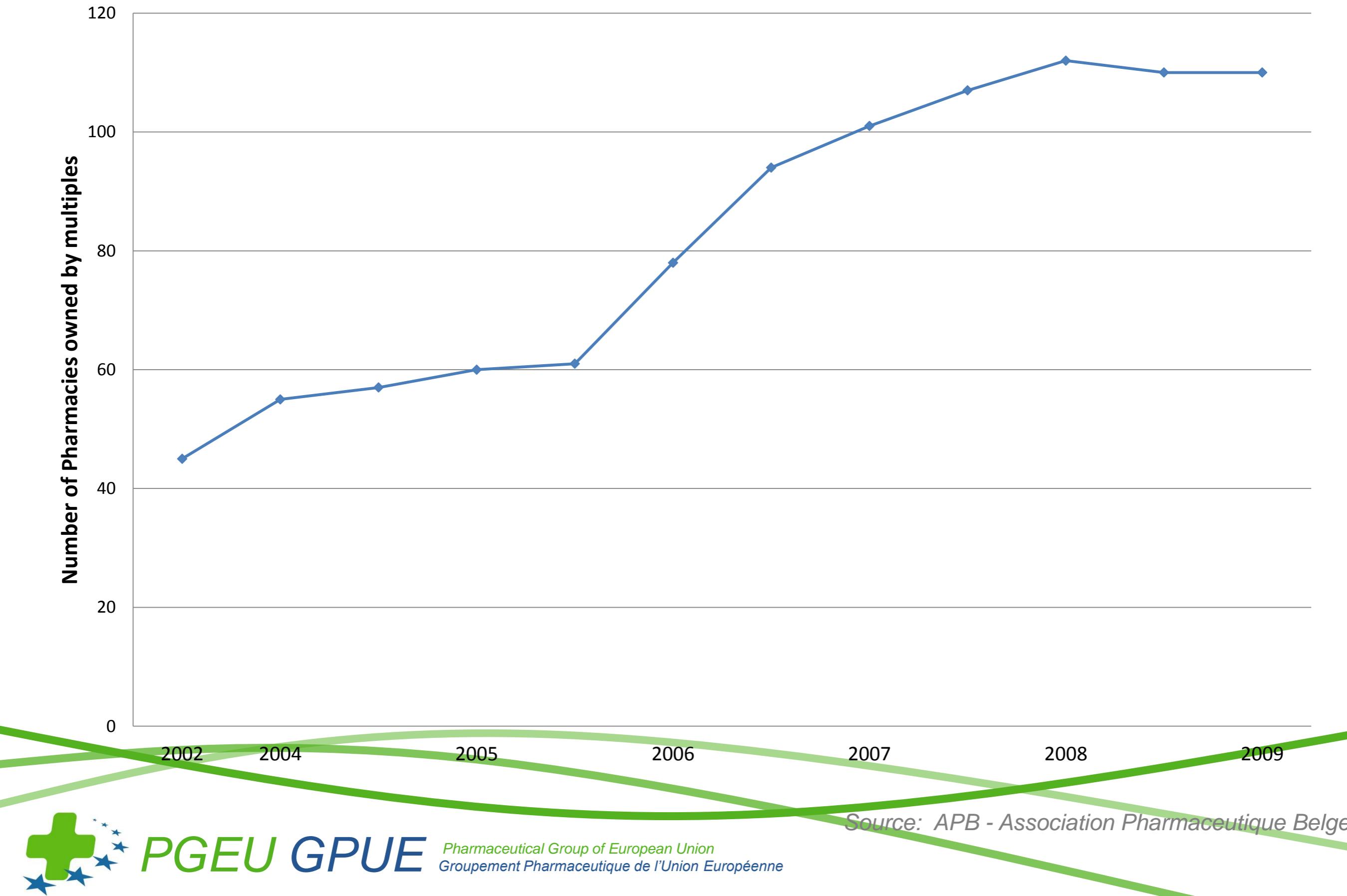


Netherlands

■ Independent ■ Multiples



Lloyds in Belgium

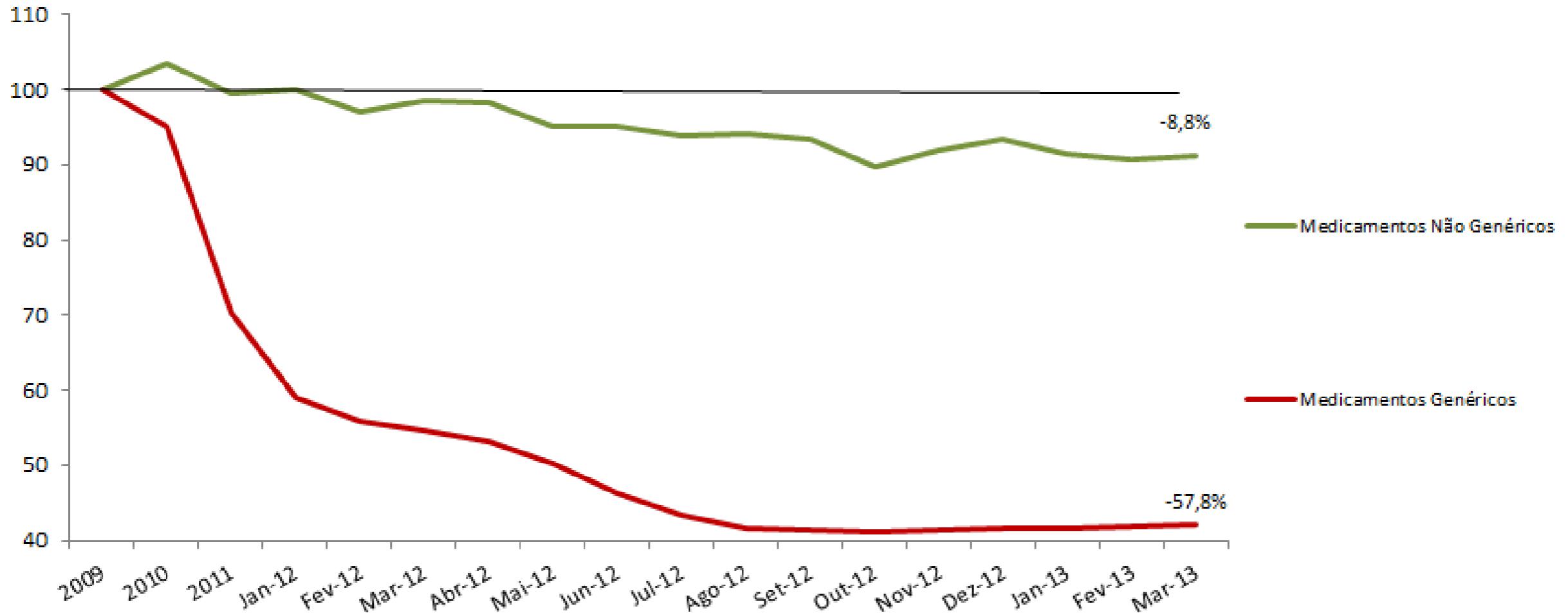


Some thoughts on liberalisation

- European Pharmacy is still an overwhelmingly independent profession, and will remain so for the foreseeable future;
- The debate now in Europe is not about legality of restrictions; it is about whether liberalised systems reduce costs;
- The challenge for European pharmacists is to demonstrate that regulated models generate added value.



Economic Change



The Dutch Generic Tendering System

The effects of tendering on prices in the Netherlands, Top 10 packs by sales, May-June 2008

Pharmaceutical Product	Preferred supplier	Pharmacy purchase price (€)		Change
		May 2008	June 2008	
1. Omeprazole tablets/capsules, 20 mg	Ratiopharm	€ 0.36	€ 0.05	- 88 %
2. Alendroninezuur tablets, 70 mg	Centrafarm	€ 4.99	€ 0.36	- 93 %
3. Omeprazole tablets/capsules, 40 mg	Centrafarm	€ 0.65	€ 0.09	- 86 %
4. Paroxetine tablets, 20 mg	Ratiopharm	€ 0.37	€ 0.07	- 82 %
5. Simvastatin tablets, 40 mg	Actavis	€ 0.27	€ 0.04	- 84 %
6. Pravastatin tablets, 40 mg	Focus Farma	€ 0.54	€ 0.13	- 76 %
7. Simvastatin tablets, 20 mg	Ratiopharm	€ 0.17	€ 0.03	- 85 %
8. Tamsulozine tablets/capsules, 0.4 mg	Centrafarm	€ 0.34	€ 0.07	- 80 %
9. Amlodipine tablets, 5 mg	Ratiopharm	€ 0.19	€ 0.03	- 85 %
10. Citalopram tablets, 20 mg	Ratiopharm	€ 0.34	€ 0.04	- 88 %

Source: Stichting Farmaceutische Kengetallen (SFK), quoted in Kanavos, Seeley and Vandoros, 2009

Since the first wave of tenders the Dutch generics market decreased 66% - Off Patent prices fall on average 85%

ZORG · 8 OKTOBER 2009

Kamer heeft begrip voor apothekers

De apothekers, die protesteren tegen de te lage prijzen waarvoor ze medicijnen moeten leveren, vonden donderdag gehoor bij de Tweede Kamer. Een Kamermeerderheid vindt dat het beleid van de zorgverzekeraars om alleen nog de goedkoopste middelen te vergoeden, aan het doorschieten is.



Met spandoeken voeren apothekers actie in Den Haag. © ANP



© KNMP 2009



© KNMP 2009



HART VAN NEDERLAND PIET PHILIPSSA SHOWNIEWS

HOME PROGRAMMA CEMIST NIEWS UIT DE PROVINCIE TIPS OVER ONS SBS 6 DAGELIJKS OM 19.00 EN 22.30 UUR VOLG HVNL

DRENTHE FLEVOLAND FRIESLAND GELDERLAND GRONINGEN UMBURG NOORD-BRABANT NOORD-HOLLAND OVERIJSEL Utrecht ZEELAND ZUID-HOLLAND

LAATSTE NIEWS

- » Loods in Reijmerstok uitgebrand
- » Gewonden bij ongeval Pijnacker
- » Billentograaf niet vervolgd
- » Onderzoek justitie geen verrassing voor ziekenhuis
- » Apothekers voeren actie tegen nieuw beleid

10.25 uur

NEDERLAND

Apothekers voeren actie tegen nieuw beleid

Een paar honderd apothekers hebben donderdag gedemonstreerd in Den Haag. Ze riepen de Tweede Kamer op een einde te maken aan nieuw beleid waarbij apothekers veel minder geld krijgen voor de medicijnen die ze aan patienten leveren.

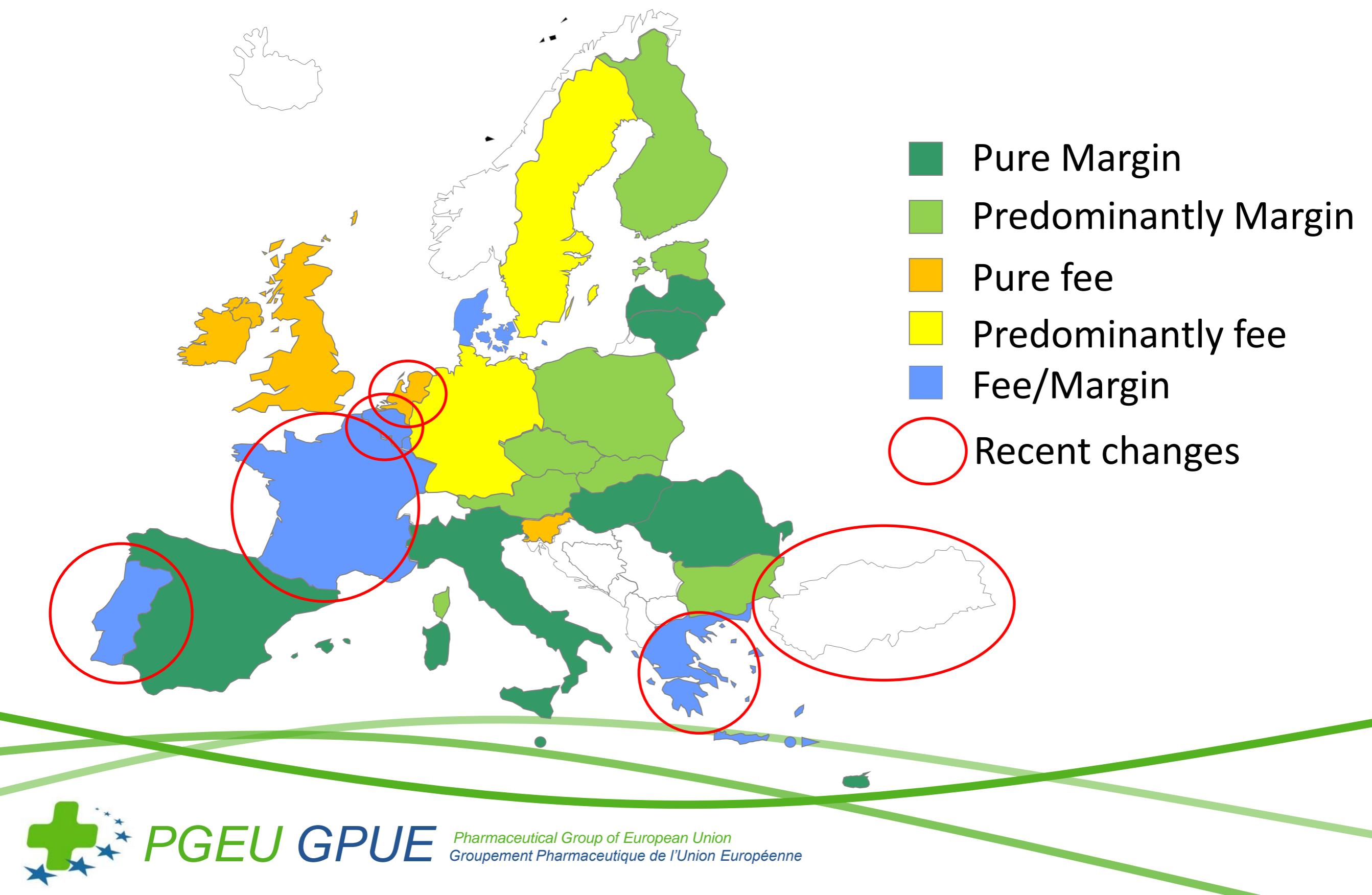
MEER

UIT DE PROVINCIE

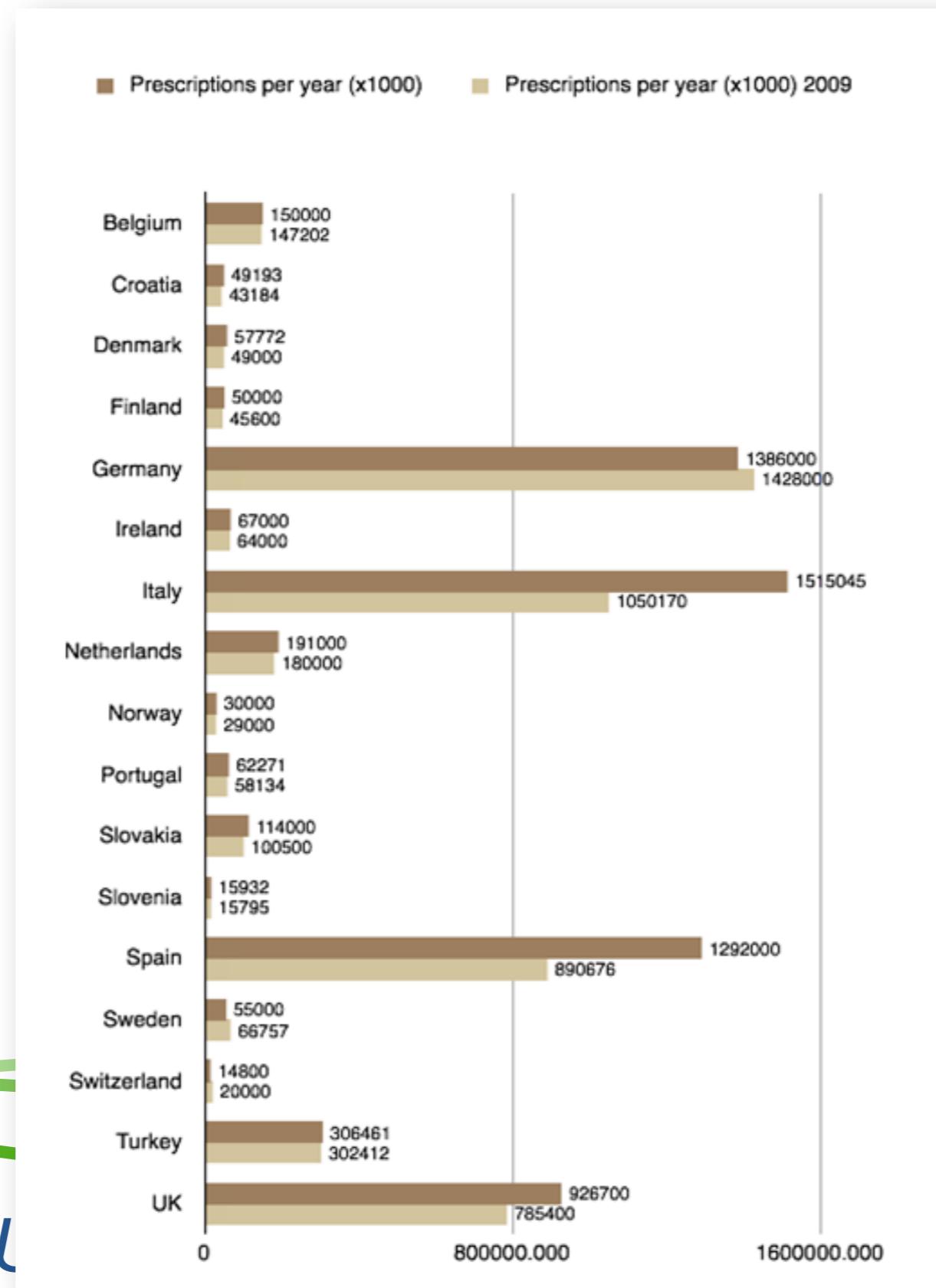
- » Loods in Reijmerstok uitgebrand
- » Gewonden bij ongeval Pijnacker
- » Billentograaf niet vervolgd

Onderstaande pagina's

Pharmacist remuneration systems in EU



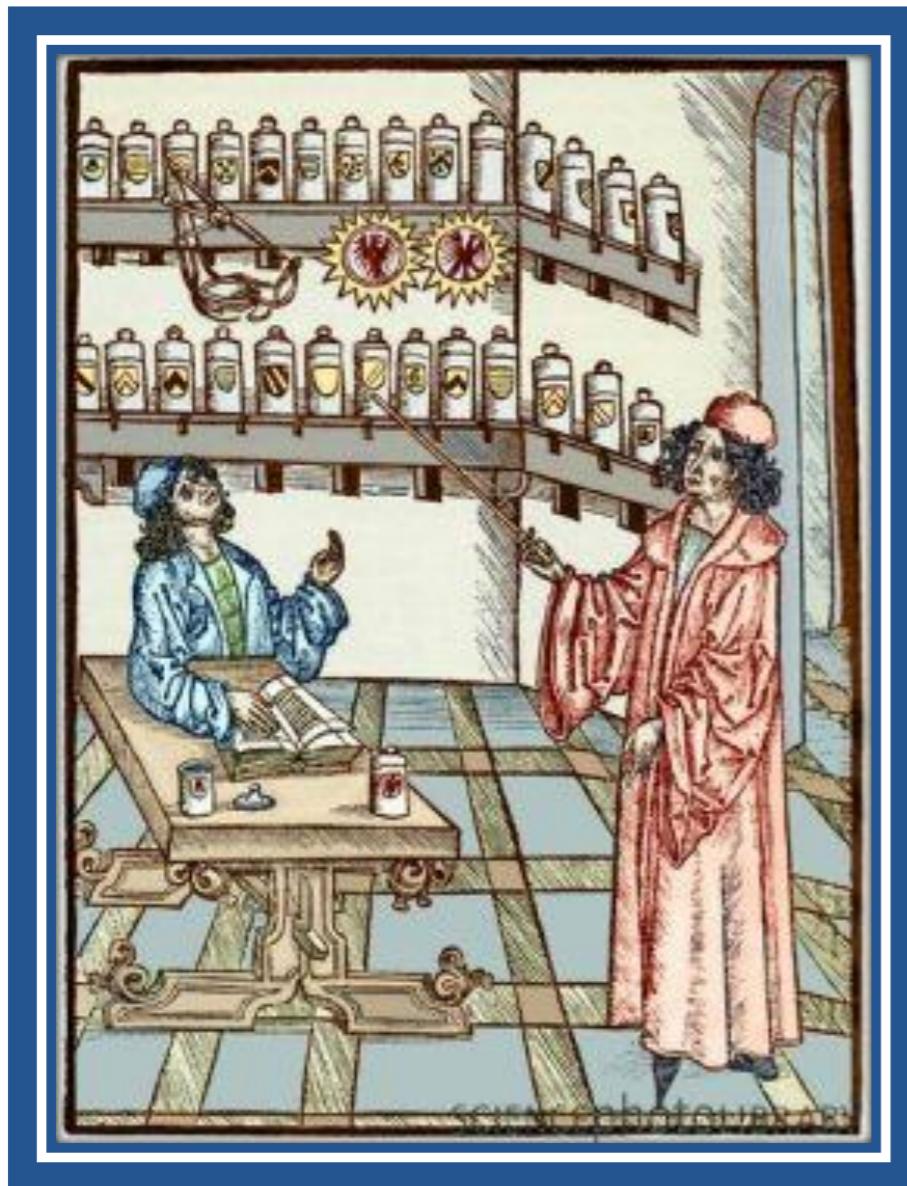
Meanwhile workload increases....



Economic Change

- In many EU countries margins and fees for pharmacists are being reduced;
- It is estimated that within the next two years 80% of medicines dispensed in the EU will be generics;
- Margin based remuneration systems were not designed for very low price generics.
- Independent pharmacies need to consider ways of generating economies of scale in order to confront economic challenges.

Professional Change



Models of Professional Practice in Europe

- Pharmacy in Europe is still dominated by the traditional dispensing model.
- A wider range of services such as medicine use reviews and other pharmaceutical care services are available in the UK, Netherlands and to a limited extent in France.
- Professional practice is very similar across Europe.





What we know about the future of European Health Systems

- The rational and appropriate use of medication will become a central concern of health systems as the populations ages, both for economic and health reasons
- 65% of people over 60 have two or more chronic conditions,
- Patients over 65 take on average 2 to 6 prescribed medications and 1-3.4 non prescribed medications, with 13 prescribed medications at higher end of the range.
- A higher prevalence of certain diseases, such as Alzheimer, Parkinson, glaucoma, osteoarthritis, and congestive heart.
- Adherence rates in this age group are 60% or less.

■ Up to 50% of cardiovascular disease admissions may be due to poor adherence

What we know about the future of European Health Systems

- Effective early detection and management of chronic disease will be essential if costs are to be contained

The burden of chronic diseases – some facts

36 million people die prematurely from preventable chronic non-communicable diseases: 63% of deaths globally



70% to 80% of healthcare costs = €700 billion in the EU and this number is expected to rise in the coming years.

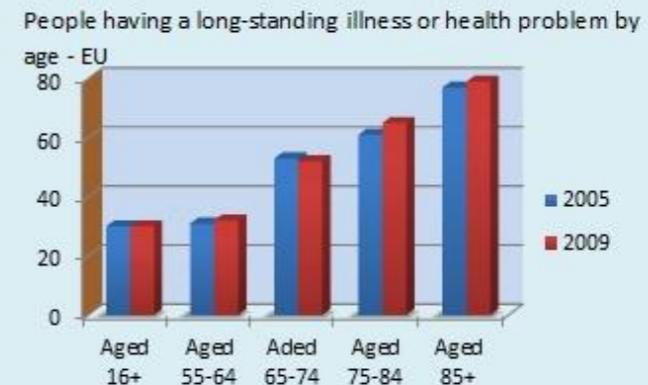
97% of health expenses are presently spent on treatment, only 3% is invested in prevention

2 out of 3 people, who have reached retirement age, have had at least two chronic conditions



40% of the population in Europe above the age of 15 is reported to have a chronic disease¹.

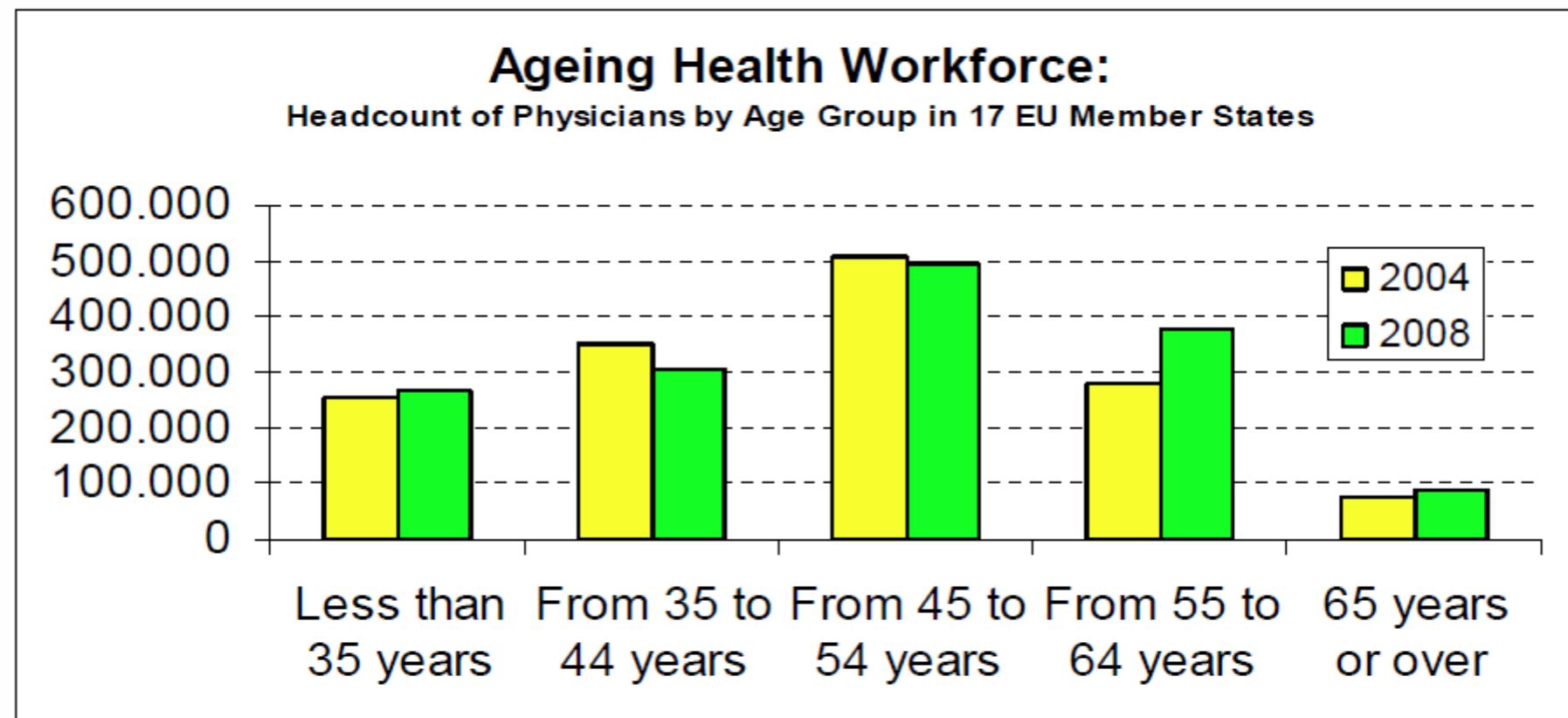
Premature deaths from chronic diseases will increase by 17% over the next 10 years if the roots of the problems are not tackled.



What we know about the future of European Health Systems

- Primary Care Services/the Health Care team will have to undertake new roles

Figure 2: Number of physicians by age group in 17 EU member States in 2004 and 2008



Source: Eurostat, 2011. Absolute numbers. Data available from 17 MS: AT, BE, CZ, DK, DE, ES, FI, FR, HU, IT, LV, LT, NL, RO, SK, SE, UK – note that for F, NL and IT data refers to professionally active doctors who may or may not have direct contact with a patient.

What we know about the future of European Health Systems

- There will need to be a significant shift from secondary to primary care settings, and an increased reliance on self care.



Where does this lead?



Looking Forward



The European Pharmacy Blueprint

- A vision for pharmacy supported by all DGFI members



A Prescription for the Future

- It is essential that pharmacy maintains its key strengths: independence, trust value, network/accessability and reliability;
- Remuneration systems may need to move away from margins towards fees;
- The opportunities offered by eHealth must be taken, particularly with regard to patient medication records;
- New services should not be seen as replacing the traditional pharmacy model, but supporting it.
- The future of pharmacy lies in the hands of today's practitioners.





PGEU ANNUAL REPORT 2012





THANK YOU

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