



the vital link in healthcare

EUROPEAN HEALTHCARE  
DISTRIBUTION ASSOCIATION

# ANNUAL REPORT 2017-2018



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**“With the emergence of personalised healthcare, innovative technologies and new models of care delivery, we have a leading responsibility to support healthcare systems.”**

René Jenny, President, GIRP

“Throughout the years, GIRP has been consistently working to raise the profile of healthcare distributors and the vital role they play in the pharmaceutical supply chain. With the emergence of personalised healthcare, innovative technologies and new models of care delivery, we have a leading responsibility, in cooperation with our partners, to support healthcare systems.

At GIRP, we are convinced that a safe and efficient healthcare environment for patients in Europe depends on close trust-based collaboration between the stakeholders right along the value chain.

GIRP is creating a platform for this type of discussion and exchange: the European Healthcare Value Chain Network.

Markets in Europe are continually evolving, and amid these changes, it is our aim to respond to the challenges, support the activity of our members and identify new opportunities to improve patients' access to medicines.”



# THE YEAR IN REVIEW

## EVENTS OVERVIEW

28 – 30 May 2017 Madrid, ES	58 <sup>TH</sup> ANNUAL MEETING AND CONFERENCE	Harnessing healthcare value levers
22 November 2017 Brussels, BE	AUTUMN MEETING	Supply chain opportunities beyond delegated regulation compliance
22 November 2017 Brussels, BE	EUROPEAN PARLIAMENT LUNCH RECEPTION	Partnerships for timely and sustainable access to medicines
24 January 2018 Brussels, BE	INDUSTRY NETWORKING RECEPTION	Creating value beyond the pill – A stakeholder endeavour
25 - 26 January 2018 Brussels, BE	BIG DATA CONFERENCE – A GIRP EDUCATIONAL ACADEMY (GEA) EVENT	Big Data: Connected solutions for better healthcare
21 - 22 March 2018 Windsor, UK	3 <sup>RD</sup> SUPPLY CHAIN CONFERENCE – A GIRP EDUCATIONAL ACADEMY (GEA) EVENT	Supply chain to value chain: Together adding value



The 58<sup>th</sup> Annual Meeting and Conference on “Harnessing healthcare value levers” was held in Madrid on 29-30 May 2017. The event registered a record high attendance, with more than 220 pharmaceutical executives engaged in a conversation encompassing current healthcare issues.



**SAFER EUROPE  
WITHOUT FALSIFIED  
MEDICINES**

Supporting our members in the implementation of the Falsified Medicines Directive has remained one of GIRP’s priorities over the last year. We have worked to promote the smoothest possible process in the implementation of the directive.

GIRP co-organised the conference “**Safer Europe without falsified medicines**” in Tallinn on 8-9 November 2017, as part of the programme of the Estonian Presidency of the EU Council.



On 22 November 2017, the **GIRP European Parliament Lunch Reception** was hosted by Karin Kadenbach, Member of the Committee on the Environment, Public Health and Food Safety (ENVI). The discussion at the reception focused on “Partnerships for timely and sustainable access to medicines”.



On 24 January 2018, on the occasion of the yearly **GIRP Industry Networking Reception, the European Healthcare Value Chain Network** was formally launched, providing the leading platform for the exchange of information, expertise, solutions and services in the pharmaceutical value chain.



**GIRP  
EDUCATIONAL  
ACADEMY**

GIRP was delighted to welcome Vytenis Andriukaitis, European Commissioner for Health and Food Safety, at the **GIRP Educational Academy (GEA) conference: “Big Data: Connected solutions for better healthcare”**. Alongside a line-up of expert speakers, the Commissioner expanded on Big Data’s “immense potential to protect and promote health and to improve healthcare and cure”. The event took place on 25-26 January 2018 at The Hotel in Brussels, with more than 100 attendees taking part in the conversation.



**GIRP  
EDUCATIONAL  
ACADEMY**

On 21-22 March 2018, the **Supply Chain Conference** took place in Windsor in the United Kingdom, where GIRP partnered with the Healthcare Distribution Association UK (HDA UK) to provide the audience with insights on the most recent technical developments in the pharmaceutical supply chain. The event brought together more than 100 participants on the core message of “**Supply chain to value chain: Together adding value**”.

# THE FALSIFIED MEDICINES DIRECTIVE IMPLEMENTATION

## THE FINAL COUNTDOWN

On 9 February 2019, the Falsified Medicines Directive (FMD) requirement for safety features will kick in and medicines verification systems will have to be live across Europe. All actors in the supply chain have duties and responsibilities to ensure they are ready to comply ahead of the deadline. Among them, wholesalers will be responsible in certain circumstances to verify the authenticity of the medicines they receive. The circumstances under which they will need to do this are established in the Delegated Regulation on safety features.

As the deadline is fast approaching, GIRP has been working closely over the last year with the European Medicines

Verification Organisation (EMVO) and the other partners across the supply chain, to ensure a smooth and timely implementation of the Falsified Medicines Directive and its Delegated Regulation. Valuable steps have been taken towards the FMD implementation, but despite the achievements, much remains to be done to be fully compliant. The challenges ahead are important. The clock is ticking and the final countdown has begun. The year ahead will see a flurry of activity to make systems operational.

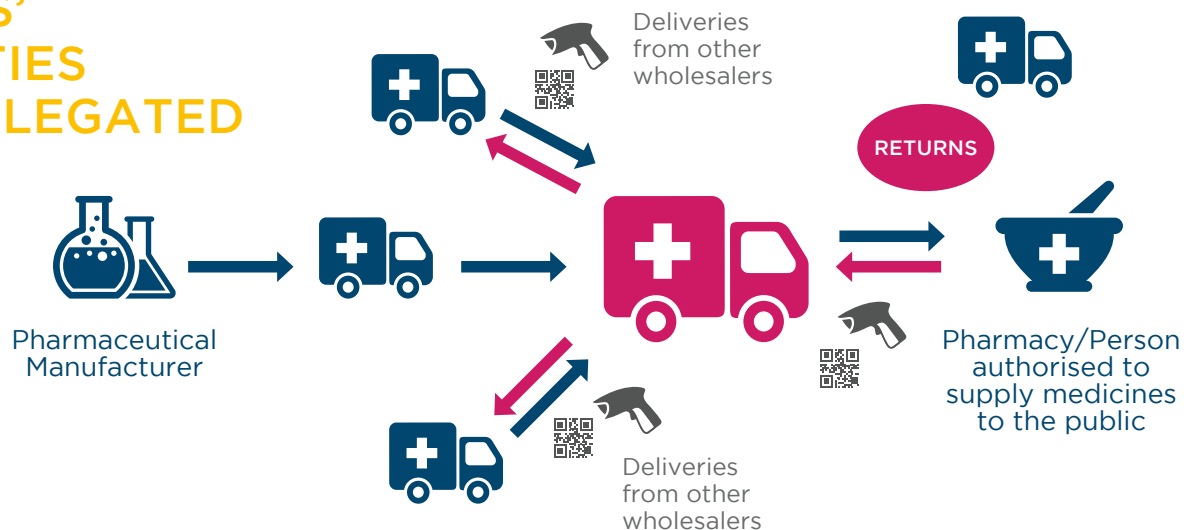
GIRP has strongly encouraged its national member associations to push for the participation of wholesalers in the establishment and governance of the National Medicines Verification

Organisations (NMVOs). Approaches vary from country to country, but wholesalers are now represented in a fair and balanced way in most places. GIRP will continue to support its members for the operational phase.

We are also glad to be able to confirm that the majority of NMVOs have now been established and are preparing for the operational phase. All stakeholders, from the On-Boarding Partners to End-Users, need to continue their work in order to be ready for the roll-out phase.

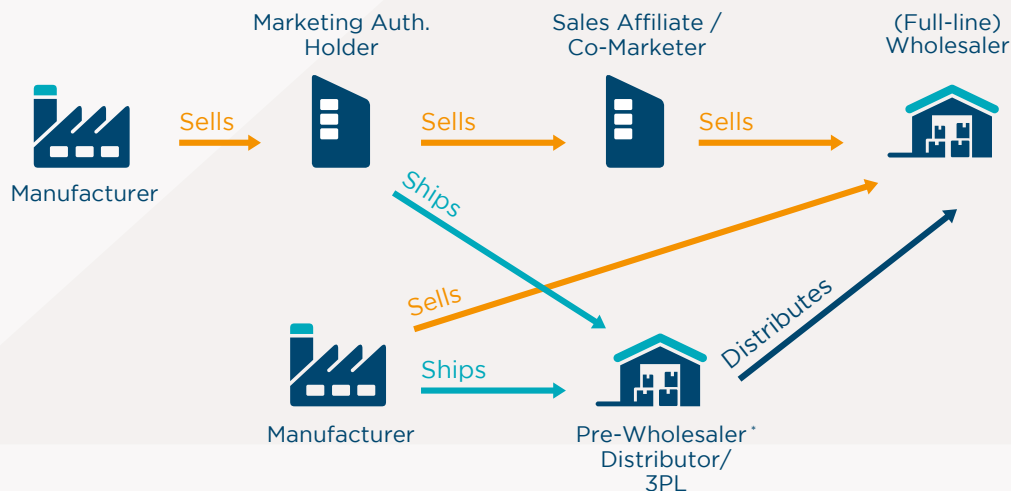
## WHOLESALE'S RESPONSIBILITIES UNDER THE DELEGATED REGULATION

VERIFICATION OF THE AUTHENTICITY OF THE UNIQUE IDENTIFIER (ART. 20)

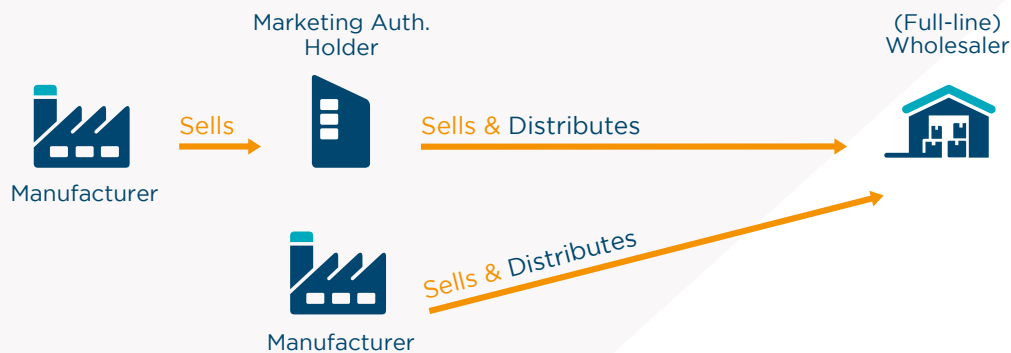


# EMVO – MASTER DATA GUIDELINES

## DESIGNATED WHOLESALER



NO VERIFICATION AT GOODS RECEIPT



VERIFY AT GOODS RECEIPT



\* Pre-Wholesaling is the provision of logistical services to pharmaceutical manufacturers, mainly consisting in the warehousing and transportation of pharmaceutical products from the manufacturer to wholesaler, ...

# HEALTHCARE DISTRIBUTORS IN THE EUROPEAN HEALTHCARE SECTOR

Healthcare distributors are essential to the efficient functioning of the European healthcare sector.

## EFFICIENCY INDICATOR: IMMEDIATE DELIVERY OF MEDICINES

- Pharmaceutical full-line wholesalers guarantee efficacious patient treatments by delivering the needed medicinal products in the required quantity and just-in-time.
- Full-line wholesalers protect the healthcare sector of high additional costs that would be caused by delays in delivering urgently needed medicine.

## WHY IS THE IMMEDIATE AVAILABILITY VITAL?

- In Europe, non-adherence to medicines and medication plans costs governments an estimated €125 billion and contributes to the premature deaths of nearly 200,000 Europeans a year <sup>(1)</sup>.

## DELIVERY FUNCTION

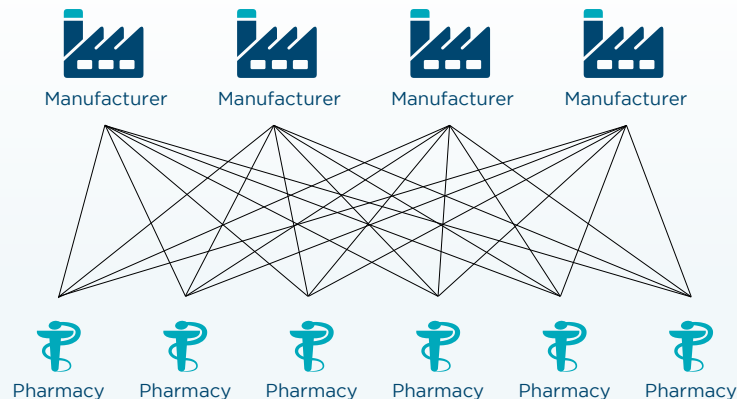
- Pharmaceutical full-line wholesalers ensure a delivery service within 4.6 hours (on average) and deliver 16.02 times per week to pharmacies (including remote areas).

## EFFICIENCY INDICATOR: REDUCED NUMBER OF TRANSACTIONS

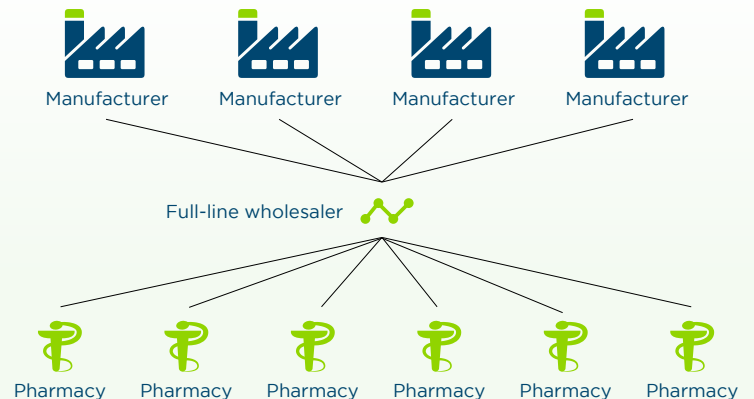
- Over 795.6 million transactions between pharmaceutical full-line wholesalers, pharmacies and manufacturers take place every year in the 6 key European markets (France, Germany, Italy, Spain, the Netherlands and the United Kingdom).
- Without pharmaceutical full-line wholesalers, the number of transactions would increase to 99.4 billion transactions per year.

<sup>(1)</sup> Source: European Federation of Pharmaceutical Industries and Associations (EFPIA)

### Direct distribution ~ 100 bn transactions



### Full-line wholesaler distribution ~ 800 M transactions

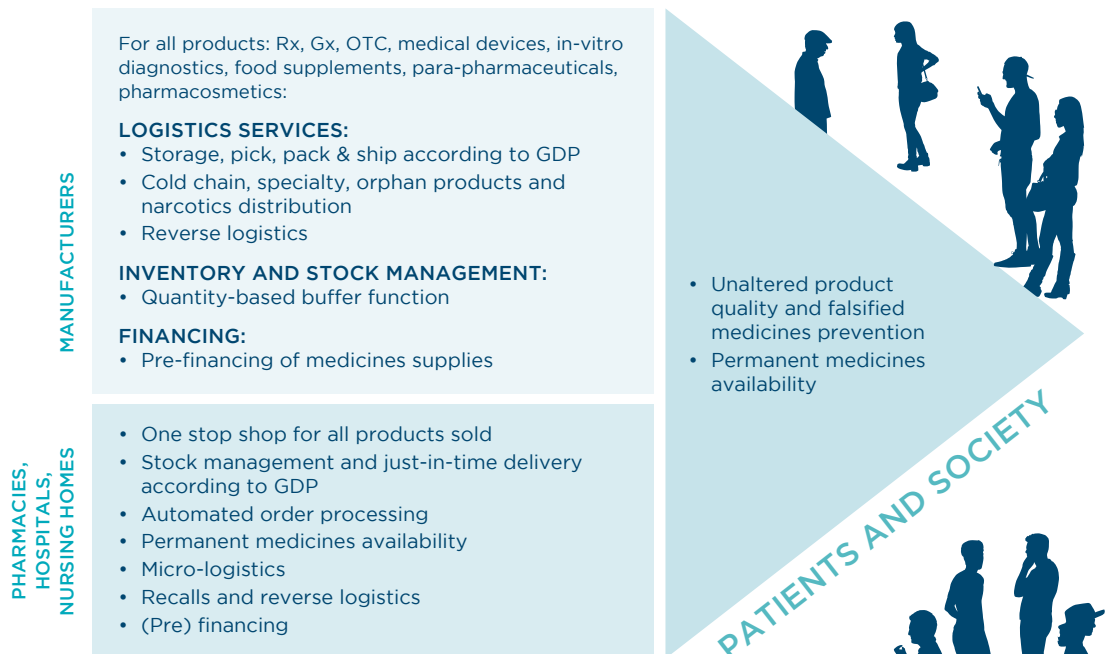




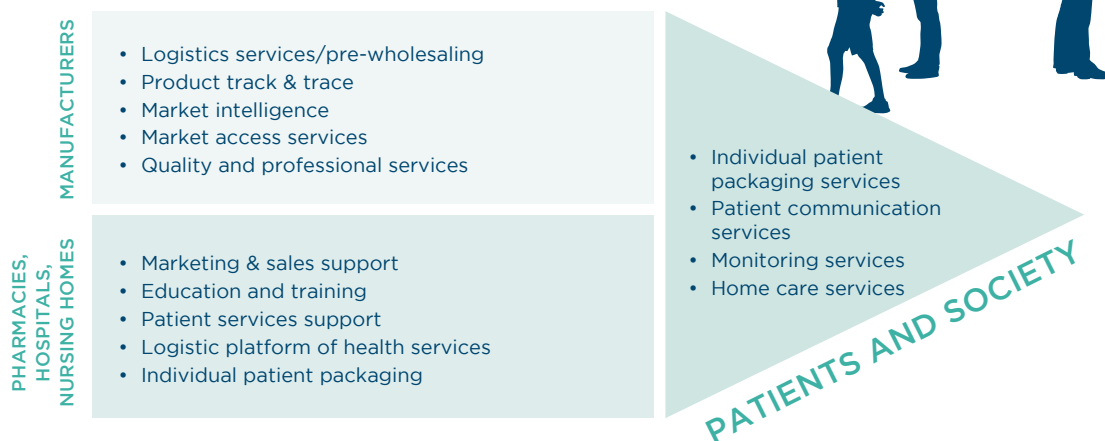
# HEALTHCARE DISTRIBUTORS' BROAD RANGE OF SERVICES



## Core services of healthcare distributors



## Healthcare distributors value-added services



IQVIA (NYSE:IQV) is a leading global provider of information, innovative technology solutions and contract research services focused on helping healthcare clients find better solutions for patients. Formed through the merger of IMS Health and Quintiles, IQVIA applies human data science - leveraging the analytic rigor and clarity of data science to the ever-expanding scope of human science - to enable companies to reimagine and develop new approaches to clinical development and commercialization, speed innovation and accelerate improvements in healthcare outcomes. Powered by the IQVIA CORE™, IQVIA delivers unique and actionable insights at the intersection of large-scale analytics, transformative technology and extensive domain expertise, as well as execution capabilities. With more than 55,000 employees, IQVIA conducts operations in more than 100 countries.

IQVIA is a global leader in protecting individual patient privacy. The company uses a wide variety of privacy-enhancing technologies and safeguards to protect individual privacy while generating and analyzing the information that helps their customers drive human health outcomes forward. IQVIA's insights and execution capabilities help all healthcare stakeholders tap into a deeper understanding of diseases, human behaviors and scientific advances, in an effort to advance their path toward cures.

To learn more, visit [www.IQVIA.com](http://www.IQVIA.com)



Ladies and gentlemen, dear GIRP members

Nothing is more sustainable than the constant change – however, there are some key elements which remain unchanged like the requirement to reach the corporate targets within your organization.

The ubiquitous „Internet of Things“, the increasing digitalization as well as the „Big Data“ approach or deep learning algorithms are influencing our daily business increasingly. All powered and supported by various, statistical information sources as well as data generated by business processes performed along the healthcare supply chain.

Digital Services – information at your finger tip, widgets especially tailored for individual users and user levels to support and monitor your business processes making it easy to react to deviations thereof. With “Digital Services” KNAPP supports you to reach your targets despite of a constantly changing environment.

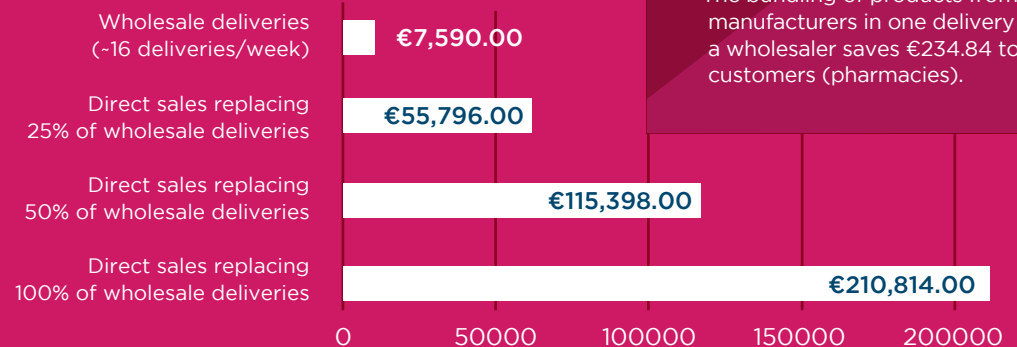
New technologies compared with elaborate data analytics enable us to create unique solutions and products like the “intelligently look at items and based on that decide how and where to grip a product” in KNAPP’s Pick-it-Easy Robot pick station or simply assist an operator to perform the right operation at the right time – the “Zero Defect” approach of KNAPP.

We are pleased to discuss the new technologies with you, dear GIRP members, and as well as to present show cases thereof in order to develop our partnership further. With best regards,

**Horst Matzer, Dipl.-Ing.**  
Director Healthcare Solutions, KNAPP AG

## EFFICIENCY STUDY THE WHOLESALING BUNDLING FUNCTION PROCESS COSTS PER PHARMACY

Source: IPF research 2016

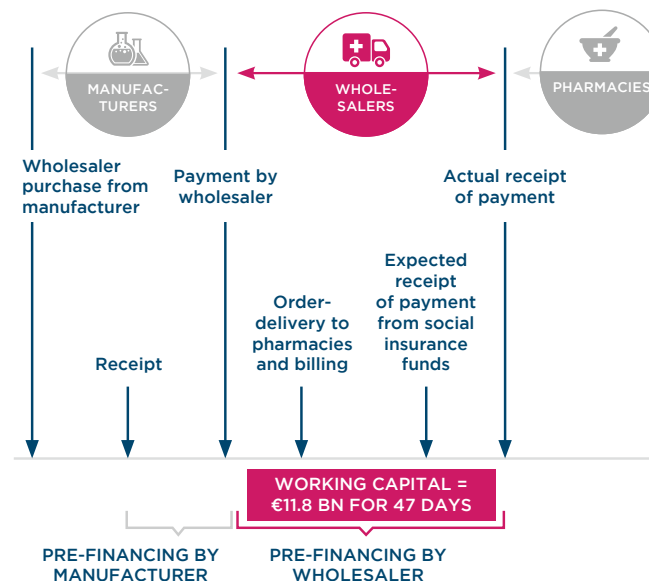


### QUICK FACTS BUNDLING FUNCTION

- Pharmaceutical full-line wholesalers ‘pool’ the medicines of 18.8 manufacturers per delivery on a weighted average.
- The bundling of products from 18.8 manufacturers in one delivery by a wholesaler saves €234.84 to customers (pharmacies).

## THE WHOLESALING FINANCING FUNCTION

Source: IPF research 2016



### QUICK FACTS FINANCING FUNCTION

- Pharmaceutical full-line wholesalers assume a financing function towards manufacturers and pharmacies.
- Pharmaceutical full-line wholesalers essentially secure the cash flow of the social insurers.
- Pharmaceutical full-line wholesalers finance on average €11.8 billion over a period of 47 days.
- Compared to the findings of the previous study (2011), financing volume increased in all six selected countries by €2.3 billion and the financing period increased by 5 days from 2011 to 2015.

# GIRP DATA

## THE EUROPEAN PHARMACEUTICAL FULL-LINE WHOLESALING SECTOR

Source: IPF Research 2016



**28**  
COUNTRIES

EU-26\* + CH + NO



**520,317,139**  
INHABITANTS



**180,743**  
DISPENSING  
POINTS<sup>2</sup>



**752**  
WHOLESALERS<sup>1</sup>

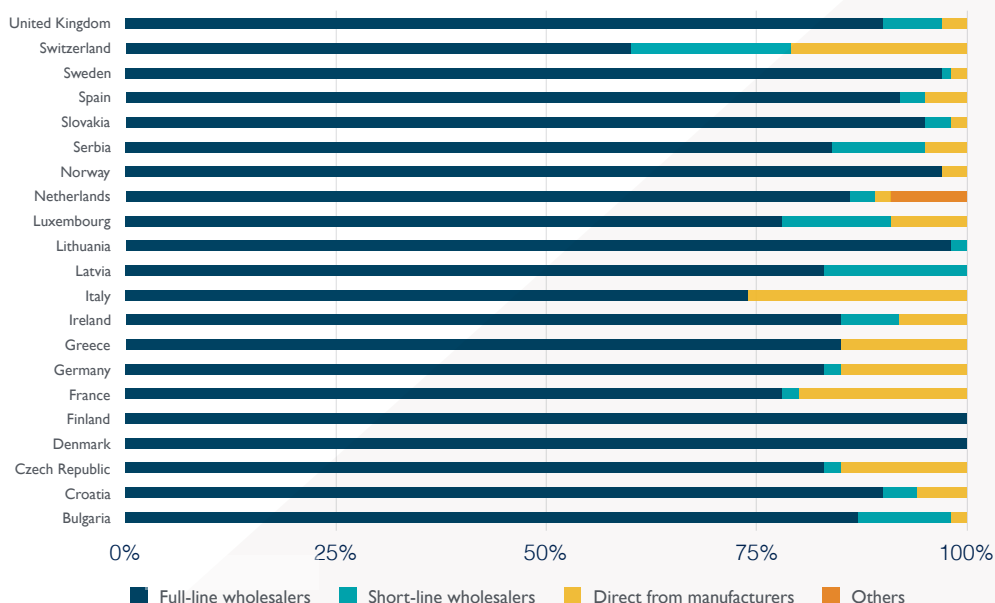


**1,490**  
OPERATING  
SITES

<sup>1</sup> National and regional wholesalers  
<sup>2</sup> Pharmacies, hospital pharmacies and dispensing doctors  
\* EU-28 without Malta and Cyprus

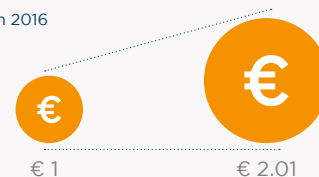
## MEDICINES SUPPLIED TO PHARMACIES PER DISTRIBUTION CHANNEL

Source: GIRP data 2017

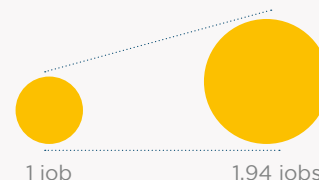


## AGGREGATED MULTIPLYING EFFECTS ON EMPLOYMENT (FTE) AND VALUE-ADDED

Source: EUROSTAT, IPF research 2016



Every €1 invested by the pharmaceutical full-line wholesale industry generates a further € 2.01 in the economies of the 6 key markets.



Each new job created by pharmaceutical full-line wholesalers generates 1.94 additional jobs in the economy as a whole.

# 58<sup>TH</sup> ANNUAL MEETING AND CONFERENCE, MADRID, SPAIN

## HARNESSING HEALTHCARE VALUE LEVERS



GIRP was honoured to welcome Encarnación Cruz Martos, Director General of the National Health System and Pharmacy Basic Services at the Ministry of Health, Social Services and Equality in Spain, who opened the conference.

The 58<sup>th</sup> Annual Meeting and Conference on “Harnessing healthcare value levers” was held in Madrid on 29-30 May 2017. The event registered a record high attendance gathering more than 220 executives from all sectors of the pharmaceutical broad spectrum. Wholesalers, manufacturers, pharmacists and insurers discussed key current issues facing the healthcare sector: cooperation within the supply chain, the impact of technological evolution, sustainability of the healthcare systems, the evolution of distribution models, with the utmost benefit of the patient remaining at the heart of the conversation.

European Commissioner for Health and Food Safety, Vytenis Andriukaitis, addressed the audience through a video message in which he highlighted three key issues: Digital Technology, Big Data and the Falsified Medicines Directive. “Digital technology is now an established and integral feature of modern society and you must be at the forefront in creating the right conditions for allowing digital development to flourish”, the Commissioner emphasised.

The message was well received. The audience recognised that all three themes were crucial to the evolution of the healthcare sector. Conference speakers repeatedly underlined the need for collaboration throughout the supply



**Vytenis Andriukaitis,**  
European Commissioner for Health & Food Safety

chain, and for a courageous adoption of innovation so as to ensure a holistic patient-care approach. This is a position strongly defended by GIRP and its members.

The members of GIRP - many of them integrated distributors of healthcare products and services - are well placed to tackle challenges of health technology and Big Data and exploit emerging opportunities to deliver real value to healthcare systems and benefit to patients. The position of distributors in the healthcare supply chain gives us a unique vantage point from which to intervene.



We focused our 2017 conference on the likely future evolutionary steps in healthcare and how we can best harness the opportunities to deliver ever-increasing value in the services we offer patients through pharmacies, healthcare institutions, our supply chain partners, payers and healthcare systems.



#### SESSION “HEALTHCARE DISTRIBUTION: A VISION FOR THE FUTURE”

Our panellists explored the trends and evolution in the healthcare distribution market and the impact of developments on the global stage, notably the specialty segment driving pharmaceutical growth and the emergence of high budgetary impact medicines prompting distributors to review their practices.

**From left to right:** David Johnston, CAPDM; Doug Long, IQVIA; Per Troein, IQVIA; Steve Collis, AmerisourceBergen.



#### SESSION “FROM CURRENT POLICIES AND PRACTICES TO A NEW APPROACH IN HEALTHCARE”

In this session, speakers delved into the role of each stakeholder along the supply chain and how close collaboration between partners can improve healthcare systems.

**From left to right:** Rajesh Patel, PGEU & UK NPA; Christoph Stoller, Teva Pharmaceuticals & Medicines for Europe; Roger Sorel, GIRP; Alicia Wildpret, COFARES; Sonia Ruiz Morán, General Pharmaceutical Council of Spain; Rui Carrington, OCP Portugal; Monika Derecque-Pois, GIRP.



The 2017 Annual Meeting and Conference concluded with a visit to Farmavenix' facilities, where participants could observe first-hand how a pharmaceutical pre-wholesaler creates value for the pharmaceutical industry and the supply chain as a whole.



Sensitech Inc. is focused on delivering supply chain visibility solutions that track, monitor and protect products for global leaders in the food, life sciences, consumer goods, and industrial markets.

Our solutions are focused in three key areas: quality and compliance, supply chain security, and logistics performance management. Quality and compliance solutions address temperature-sensitive, complex supply chains focused on delivering the highest quality possible, while our supply chain security solutions help to mitigate risks associated with theft, diversion and chain of custody. Sensitech's logistics performance solutions deliver origin-to-destination, real-time transparency to any in-transit journey.

For more than 25 years we have helped our customers to deliver higher quality products, ensure patient safety, comply with regulatory requirements, protect brand equity, and increase profitability.

**To find out more, please visit:**  
[www.sensitech.com](http://www.sensitech.com)

# BIG DATA CONFERENCE, BRUSSELS, BELGIUM

## BIG DATA: CONNECTED SOLUTIONS FOR BETTER HEALTHCARE



On 25-26 January 2018, in the scope of the GIRP Educational Academy, GIRP launched its newest venture, the conference 'Big Data: Connected solutions for better healthcare' at The Hotel in Brussels. The topic generated much interest and discussions among more than 100 participants, who took the opportunity to reflect with skilled professionals on how to make the most of innovative practices.

The great potential of Big Data was remarked on by both Jyrki Katainen, European Commission Vice-President for Jobs, Growth, Investment and Competitiveness and Vytenis Andriukaitis, Commissioner for Health and Food Safety. They highlighted its ability to identify patterns and lead to new prevention, diagnostic and therapeutic techniques, while simultaneously decreasing inefficiencies and reducing waste of time and resources.

Speakers also pointed out that the pharmaceutical wholesale sector collects large quantities of data, ranging from shipping and logistics details to sales orders and invoices. This wealth of information, when combined with existing analytics solutions, can offer unique insights into the market and help determine how to push efficiency and thus contribute to the sustainability of healthcare systems.



**IBM Watson Health and Pfizer presented their cooperation combining Big Data, artificial intelligence, and pharmaceutical and medical research to tackle cancer.**



### BETTER MARKET DECISIONS WITH INSIGHT INTO HEALTH

The complexity and challenges in pharmaceutical supply chain management are constantly increasing. While the big pharmaceutical pipelines focus on specialty drugs, market sales are dominated by generics and OTC products, both being exposed to increasing price competition. With our platform for digital market data, INSIGHT Health makes the development of the supply chain in several European countries more predictable. With our customer-oriented tools and intelligent data analysis, we provide our clients with simple and efficient access to in-depth market knowledge. Wholesalers and pharmacies in particular will be challenged by future developments and the digitisation of the health care system.

On the other hand, an increased flow of information could, for example, lead to automatic pricing in pharmacies according to real-time market data. In this way, digitisation could support existing business models instead of threatening them. In order to master these challenges successfully, INSIGHT Health has already established tailor-made services and analysis platforms. INSIGHT Health is pleased to support the work of GIRP and all GIRP members and to intensify the cooperation.

**Further information can be found at:**  
[www.insight-health.de](http://www.insight-health.de)

## 3<sup>RD</sup> SUPPLY CHAIN CONFERENCE, WINDSOR, UNIT- ED KINGDOM

### SUPPLY CHAIN TO VALUE CHAIN: TOGETHER ADDING VALUE



This year, the Supply Chain Conference moved to Windsor, in the United Kingdom, where GIRP partnered with its British member, the Healthcare Distribution Association UK (HDA UK) to provide the audience with insightful content and engaging discussions on the latest hot topics of the pharmaceutical supply chain.

Building on the fruitful exchanges in previous years, the 3<sup>rd</sup> edition of the GEA event addressed new ways of transforming the pharmaceutical supply chain into a true pharmaceutical value chain. The event was held on 21-22 March 2018.

Over 100 guests, including expert speakers from pharmaceutical manufacturing, healthcare distributors, and other supply chain stakeholders, as well as 5 GMMP inspectors joined us this year and contributed to the debates.

Topics ranged from latest innovations in handling temperature-sensitive products and the use of electronic delivery notes to the implementation of the Falsified Medicines Directive. Presentations of the latest collaborative projects on temperature-controlled storage and transportation included an exchange of views on GDP implementation with the GMMP inspectors.



1996-2016, 20 years of creating packaging solutions. CAPPI first started out in the design and manufacturing of plastic shipping totes dedicated to pharmaceutical wholesalers. Driven by innovation, CAPPI invests in the development and testing of customized packaging for the transport of temperature-controlled products year-on-year. A leading company in the French market, CAPPI continues its international growth in three strategic markets: pharmaceutical manufacturers, pharmaceutical wholesalers and the food industry.

CAPPI meets demands from all across the pharmaceutical supply chain, from manufacturer to wholesaler and from wholesaler to pharmacy. Our range of plastic shipping totes for pharmaceutical wholesalers are designed and tested to integrate automated order preparation processes. Equipped with a qualified, isothermal protection inlay to respect any temperature range during transport: guaranteed to satisfy all mechanical and thermal needs.

Learn more at: [www.cappi.fr](http://www.cappi.fr)





#### OUTSTANDING SERVICE: SSI SCHAEFER'S CSS TEAM RECEIVES SUPPLIER AWARD 2017

Having the highest availability of all systems and short service lead times are huge factors in successfully operating complex logistics systems. The PHOENIX group, a leading pharmaceutical trader in Europe, highly values the SSI Schaefer approach to timely implementation and has granted the Customer Service & Support (CSS) team its Supplier Award 2017.

In keeping with their high standards and in order to meet the growing demands on quantity and service, the PHOENIX Group adapted their logistics system in Oldenburg in several modernization steps together with SSI Schaefer. The result was a significant increase in performance from the entire system. In two implementation steps with 14 new fully automatic A-Frames, an entire picking line was replaced and furthermore the complete warehouse control was renewed. The intralogistics expert also replaced the components of the main conveyor between the picking and shipping area in the three story system. The CSS team mainly worked during times of little operation and almost all around the clock to avoid affecting the readiness for delivery of the logistics center.

SSI Schaefer received the Supplier Award from the renowned pharmaceutical trader as "Best project team 2017" for implementing the extremely challenging project, which was very technical and came with stringent timescales.

## AUTUMN MEETING, BRUSSELS, BELGIUM

### SUPPLY CHAIN OPPORTUNITIES BEYOND DELEGATED REGULATION COMPLIANCE



From left to right: Rob Moss,  
European Association of Hospital  
Pharmacists; Bernd Grabner,  
Jacoby GM Pharma; Eddy Gilissen,  
IQVIA; Graham Smith, Tracelink

On the occasion of the GIRP 2017 Autumn Conference, held on 21-22 November 2017, GIRP invited partners from the healthcare sector along with solution providers to explore the potential to create new partnerships and to spur new occasions for collaboration.

Since the implementation of the Delegated Regulation on safety features, which complements the Falsified Medicines Directive, is in full swing, supply chain processes are being reorganised as untapped opportunities are arising for healthcare distributors.

Speakers discussed how healthcare distributors can capitalise on their expertise and unique vantage point in the supply chain to help partners develop new business opportunities and models beyond pure compliance.

## EUROPEAN PARLIAMENT LUNCH RECEPTION, BRUSSELS, BELGIUM

### PARTNERSHIPS FOR TIMELY AND SUSTAINABLE ACCESS TO MEDICINE

GIRP's mandate also envisages regular exchanges with Members of the European Parliament, to keep them informed of the challenges faced by the sector and to ensure they have a good understanding of the crucial role distributors play in the healthcare system. Karin Kadenbach hosted the 2017 edition of our yearly event, which allowed again for the customary candid discussion with national and European decision-makers.

Ms Kadenbach commended the "tremendous effort showing wholesalers' engagement to patients all around Europe by ensuring that each patient has access to the right medicine, at the right place, at the right time and in the right conditions."

The MEP also recognized that "GIRP has built a strong partnership with PACT (the Patients Access Partnership)



# INDUSTRY NETWORKING RECEPTION, BRUSSELS, BELGIUM

## CREATING VALUE BEYOND THE PILL - A STAKEHOLDER ENDEAVOUR



GIRP has a strong commitment to facilitate and strengthen partnerships, build trust, and find new opportunities for growth and innovation. The GIRP Industry Networking Reception is a yearly event aiming to provide an informal opportunity for representatives from the pharmaceutical industry, healthcare distributors and pharmacists to come together and to discuss common issues affecting the pharmaceutical supply chain.



The event seeks to facilitate and strengthen partnerships, build trust, and find new opportunities for growth and innovation. On 24 January 2018, the reception hosted by GIRP's Advisory Council Supply Chain Solutions brought together around 50 participants from GIRP members, the pharmaceutical industry and other supply chain partners.



**Ms Karin Kadenbach, Member of European Parliament, hosted the luncheon.**

collaborating with the other stakeholders and patients' representatives in developing innovative and sustainable solutions to ensure equitable patients' access to medicines".



**Dr. Paul Rübig, Member of European Parliament**



Excellis Health Solutions is a leading provider of strategy and implementation consulting services within the Life Sciences and Healthcare industries on a global level.

Since its foundation in the USA in 2010 and established European presence in 2014, Excellis health solutions is now recognized as the global leader in serialization consultancy for the pharmaceutical industry.

With more than 110 employees, Excellis can rely on its experts, a proven methodology, a strong customer base and wide range of best-in-class use-cases to successfully deliver projects with a world-wide structure and a Pan-European team.

Excellis work for the pharmaceutical industry focuses on the processes and integration for the MAH, CMOs, the extended Supply Chain as well as the hospitals and Pharmacies.

The company has an established thought leadership position (EFPIA, EMVO, UK-NMVO, BAEPD, EAEPD, HDA, FDA, GTT, ...) and a very strong partner network through the European pharma Eco-system. This gives Excellis a unique insight into the wider serialisation landscape including the distribution, the brand protection and anti-counterfeiting aspects.

Excellis remains agnostic in his approach of solutions. 3C Excellis have been recognized as Best EU Specialized Pharma Consultancy and Serialization Experts of the Year 2016 and 2017.

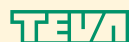
## EUROPEAN HEALTHCARE VALUE CHAIN NETWORK

Ensuring that patients receive the right medicine at the right time and from the right location requires a complex value chain involving many different pharmaceutical supply stakeholders.

The **European Healthcare Value Chain Network** aims to connect dynamic supply chain stakeholders (pharmaceutical specialty, branded and generic manufacturers, healthcare distributors, healthcare retailers and

supply chain providers) to break down the conventional barriers to partnership and collaboration between stakeholders on operational and value chain matters. The forum is the leading platform for the exchange of information, learning, expertise, competencies, solutions and services in the pharmaceutical value chain, and provides the right environment for trust-building in supply chain partner relationships.

Our ever-growing partners pool currently includes:



## TARGET AREAS FOR ACTIONS:

- **Supply chain operational aspects**
  - service level definition, inventory management, ordering processes, pre-wholesaling / third party logistic services.
- **Transparency**
  - setting the framework for enhanced transparency and trust building at each stage of the value chain.
- **‘Beyond the pill’ initiatives**
  - focusing on patient centric solution and services such as adherence.
- **Falsified Medicines Directive**
  - focusing on areas for collaboration and opportunities beyond compliance implementation.
- **Implementation of Good Distribution Practices (GDP)**
  - tackling operational challenges for controlled temperature compliance across the sector areas and assessing opportunities for multi-partner collaboration.
- **Distribution**
  - the effective distribution of specialty medicines, personalised medicines, orphan medicines, etc.
- **Market access**
  - leveraging cross-sectoral expertise and competency to achieve optimized market access.
- **E-initiatives**
  - e-health, EPR, e-prescriptions.
- **Big Data.**
- **Digital disrupters**
  - taking partners ‘beyond the pill’.

## GIRP UPCOMING EVENTS

<b>27 May 2018</b> Dublin, IE	<b>EUROPEAN HEALTH POLICY BRIEFING &amp; GENERAL ASSEMBLY</b>
<b>28 - 29 May 2018</b> Dublin, IE	<b>59<sup>TH</sup> ANNUAL MEETING AND CONFERENCE</b>
<b>13 September 2018</b> Sofia, BG	<b>REGIONAL FOCUS MEETING</b>
<b>7 November 2018</b> Brussels, BE	<b>EUROPEAN HEALTH POLICY BRIEFING &amp; GENERAL ASSEMBLY</b>
<b>8 November 2018</b> Brussels, BE	<b>AUTUMN MEETING</b>
<b>28 - 29 March 2019</b> Nice, FR	<b>4<sup>TH</sup> SUPPLY CHAIN CONFERENCE</b>
<b>27 - 28 May 2019</b> Stockholm, SE	<b>60<sup>TH</sup> ANNUAL MEETING AND CONFERENCE</b>



### TEMPERATURE-CONTROLLED SOLUTIONS TO MAINTAIN THE QUALITY AND INTEGRITY OF MEDICAL PRODUCTS DURING TRANSPORT

The design and qualification of suitable transport equipment to ensure that the required storage conditions of medicinal products are maintained, is a critical requirement of the new Good Distributions Practice (GDP) guidelines.

Thermo King PharmaSolutions offers a wide range of GDP qualified transport equipment to fit every stage of the distribution process, from trailers transporting goods from manufacturing facilities to distribution centers, to vans in the last mile distribution. Along with initial temperature mapping, documentation of the four stages of qualification based on Good Manufacturing Practice (GMP) Annex 15, Thermo King offers strong expertise with a wide European service network of more than 1400 CERTI-TECH trained and certified technicians.

Thermo King, as the leading manufacturer of transport temperature control systems, helps you meet additional GDP requirements, by providing GAMP5 validated real-time temperature monitoring, preventative maintenance, easy access to service and calibration activities on transport equipment and monitoring devices, 24/7 assistance as well as training.

For further information, please visit [www.thermoking.com](http://www.thermoking.com).



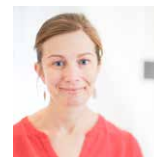
# ABOUT GIRP

GIRP, the European Healthcare Distribution Association, is the umbrella organisation for pharmaceutical full-line wholesalers and distributors of healthcare products and services in Europe. It represents the national associations of over 750 pharmaceutical wholesalers serving 35 European countries, as well as major international and pan-European healthcare distribution companies. GIRP members employ over 140,000 people and distribute around 15 billion packs of medicines as well as a wide range of healthcare products per year. As the vital link in healthcare, they are committed to developing and providing innovative and efficient healthcare products and services to improve health and wellbeing of patients across Europe.

## THE GIRP TEAM



**Monika Derecque-Pois**  
Director General



**Pauline Foucher**  
External Affairs  
Manager



**Martin FitzGerald**  
Deputy  
Director General



**Judith Kalina**  
Corporate Affairs  
Manager



**Giulia Colombo**  
Regulatory Affairs  
Manager



**Susanne Trischler**  
Communications  
and Event Manager

The premier platform reaching across Europe and beyond with expertise and experience for our partners' excellence.

## GIRP COMMITTEES

### COMMITTEES

- Economic and Social Affairs Committee (ECOSOC)
- Legal Affairs Committee (LAC)
- Policy and Public Affairs Committee (PAPC)
- Technical Committee (TC)

### ADVISORY COUNCIL

- Advisory Council Chain Solutions (ACSCS)



**750+**  
pharmaceutical  
full-line wholesalers



stock and deliver  
**100,000**  
products from



**3,500**  
manufacturers to



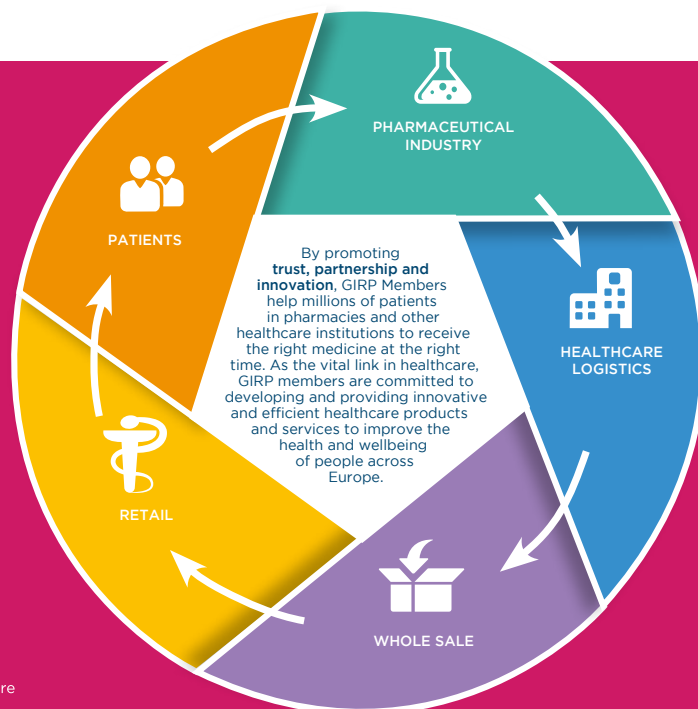
approximately  
**180,000**  
pharmacies and healthcare  
professionals dispensing  
medicines



in **35** European countries



That's **15 billion**  
packs of medicines and healthcare  
products per year!





# GIRP BOARD 2017 - 2019 MANDATE



**Mr René Jenny**  
GIRP President



**Mr David Cole**  
GIRP Vice-President  
European Affairs  
Director, HDA UK



**Dr. Roger Sorel**  
GIRP Vice-President  
Member of the Board,  
BG Pharma



**Ms Alicia Wildpret**  
GIRP Vice-President  
Member of the Board,  
COFARES



**Mr Oliver Windholz**  
GIRP Vice-President  
CEO, PHOENIX Group



**Dr. Thomas Trümper**  
GIRP Treasurer  
President, PHAGRO



**Mr Robert W. Andersson**  
President,  
ORIOLA



**Mr Olivier Brochain**  
General Director,  
SECOF



**Mr Rui Carrington**  
Vice-President,  
GROQUIFAR



**Mr Emmanuel Déchin**  
Secretary General,  
CSRP



**Mr Mauro Giombini**  
President,  
ADF



**Mr Bernd Grabner**  
Vice-President,  
PHAGO



**Mr Lothar Jenne**  
Managing Director,  
Max Jenne Arzneimittel  
Grosshandlung KG  
(Pharma Privat)



**Ms Mari Krass**  
Member of the Board,  
Magnum



**Dr. Michael Kuck**  
CEO,  
NOWEDA



**Mr Wolfgang Mähr**  
Head of Supervisory  
Board,  
Alliance Healthcare DE



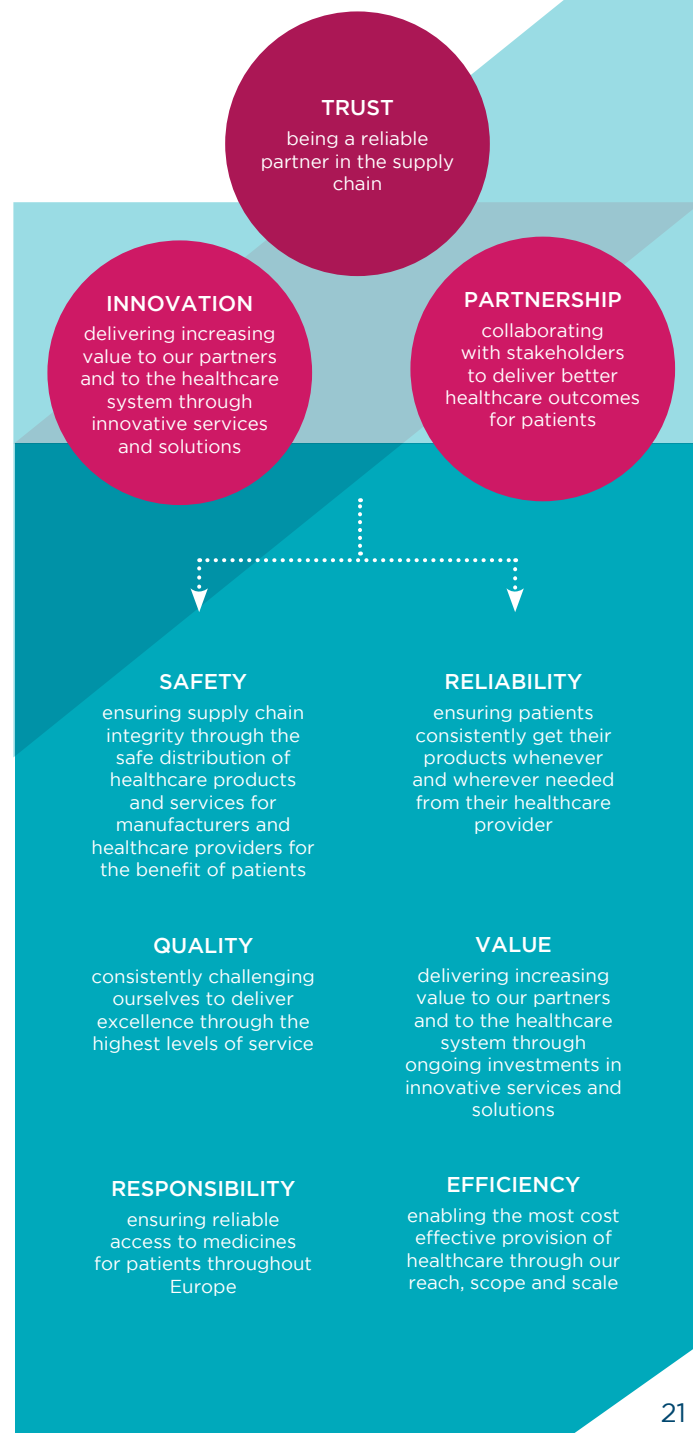
**Mr Brian Tyler**  
Chairman of the  
Management Board,  
McKesson Europe



**Mr Miguel Valdés**  
Director General,  
FEDIFAR



**Mr Eric Van Nueten**  
Member of the Board,  
NVGV-ANGR



# GIRP MEMBERS

<b>AUSTRIA</b>	PHAGO Verband der Österreichischen Arzneimittelvollgroßhändler
<b>BELGIUM</b>	NVGV – ANGR Association Nationale des Grossistes-Répartiteurs en Spécialités Pharmaceutiques
<b>BULGARIA</b>	BATEL Bulgarian Association of Pharmaceutical Wholesalers
<b>CROATIA</b>	PHOENIX Farmacija, Medika, Medical Intertrade, Oktal Pharma
<b>CZECH REPUBLIC</b>	AVEL Asociace velkodistributorů léků / Czech Association of Full-line Wholesalers
<b>DENMARK</b>	MEGROS Foreningen af medicingrossister / Danish Association of Pharmaceutical Wholesalers
<b>ESTONIA</b>	ERHL Estonian Association of Pharmaceutical Wholesalers
<b>FINLAND</b>	LHT Lääkehuolto – Finnish Association of Pharmaceutical Distributors
<b>FRANCE</b>	CSRP Chambre Syndicale de la Répartition Pharmaceutique
<b>GERMANY</b>	PHAGRO Bundesverband des pharmazeutischen Großhandels
<b>GREECE</b>	PAPW Panhellenic Association of Pharmaceutical Wholesalers and Qualified Pharmacists
<b>HUNGARY</b>	HAPW Hungarian Association of Pharmaceutical Wholesalers
<b>ICELAND</b>	Distica
<b>IRELAND</b>	PDF Pharmaceutical Distributors Federation
<b>ITALY</b>	ADF Associazione Distributori Farmaceutici
<b>LATVIA</b>	LZLA Latvian Association of Pharmaceutical Wholesalers
<b>LITHUANIA</b>	LAPW Lithuanian Association of Pharmaceutical Wholesalers
<b>LUXEMBOURG</b>	HANFF - Global Health Solutions
<b>NETHERLANDS</b>	BG Pharma

<b>NORWAY</b>	NAPW Norwegian Association of Pharmaceutical Wholesalers
<b>POLAND</b>	Pelion
<b>PORTUGAL</b>	ADIFA Associação de Distribuidores Farmacêuticos GROQUIFAR Associação de Grossistas de Produtos Químicos e Farmacêuticos
<b>ROMANIA</b>	ADRFAR Asociația Distribuitorilor și Retailerilor Farmaceutici din Romania
<b>SERBIA</b>	Serbian Chamber of Commerce - Group of Pharmaceutical Wholesalers
<b>SLOVENIA</b>	TZS Slovenian Chamber of Commerce, Pharmaceutical Full-line Wholesalers
<b>SLOVAKIA</b>	AVEL Asociácia veľkodistribútorov liekov
<b>SPAIN</b>	FEDIFAR Federación Nacional de Asociaciones de Mayoristas Distribuidores de Especialidades Farmacéuticas y Productos Parafarmacéuticas
<b>SWEDEN</b>	LDF Läkemedelsdistributörsföreningen / Swedish Association of Pharmaceutical Wholesalers
<b>SWITZERLAND</b>	Pharmalog.ch Swiss pharma logistics association
<b>UNITED KINGDOM</b>	HDA UK Healthcare Distribution Association

## GIRP ASSOCIATED MEMBERS

<b>ALBANIA</b>	Resj Farma	<b>SERBIA</b>	Farmalogist
<b>CHINA</b>	CAPC	<b>SWEDEN</b>	AtrimusRx
<b>MALTA</b>	Lykos Pharma	<b>TURKEY</b>	TEKB
<b>RUSSIA</b>	Katren	<b>INTERNATIONAL</b>	Eurapharma

## FULL MEMBER COMPANIES



Näher dran. Weiter vorn.



## EUROPEAN HEALTHCARE VALUE CHAIN NETWORK



## GIRP SPONSORS





European Healthcare Distribution Association  
Groupement International de la Répartition Pharmaceutique

Rue de la Loi, 26  
10<sup>th</sup> floor  
Box 14  
1040 Brussels  
Belgium

Tel: +32 2 777 99 77  
Fax: +32 2 770 36 01  
Email: [girp@girp.eu](mailto:girp@girp.eu)  
W: [www.girp.eu](http://www.girp.eu)

