



HEALTHCARE THE VITAL LINK IN HEALTHCARE THE VITAL LINK IN HEALTHCARE THE VITAL LINK IN HEALTHCARE

GIRP

the vital link in healthcare

EUROPEAN HEALTHCARE
DISTRIBUTION ASSOCIATION

Annual Report
2015-2016

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Annual Report 2015-2016





"GIRP is now the European Healthcare Distribution Association. It still represents pharmaceutical full-line wholesalers and integrated healthcare companies. But the range of products and services in which our members are engaged has expanded, and this creates possibilities for closer collaboration throughout the entire length of the pharmaceutical supply chain. Our name change is a reflection of the importance of cooperation with our partners - a logical evolution seen in many other industry sectors."

René Jenny
President, GIRP

YEAR IN REVIEW

NEW NAME

From the European Association of Pharmaceutical Full-line Wholesalers to the European Healthcare Distribution Association... GIRP changed its English-language name in November 2015, to reflect the range of products that wholesalers handle – including medical devices and food supplements – and the expansion of their role into value-added services. The new name highlights GIRP's important role as the vital link in healthcare: developing and providing innovative and efficient healthcare products and services to improve the health and wellbeing of people across Europe.

FIGHTING FALSIFIED MEDICINES

GIRP is one of the founding partners in the European Medicines Verification Organisation (EMVO), that brings together the three principal European associations of manufacturers and marketing authorisation holders (EAEPC, Medicines for Europe and EFPIA) as well as the European Association of Community Pharmacists (PGEU). Launched in 2015, EMVO is a central part of the sectoral response to the challenge of keeping falsified medicines out of the supply chain.

THE RULES ARE IN PLACE ON SAFETY FEATURES

The clock is ticking! In February 2016, the legislation specifying detailed rules for the safety features on medicine packs – the European Commission's Delegated Regulation – was published. This gives wholesalers just three years to be in a position to provide risk-based verification of the authenticity of medicines at the wholesale level, to be ready – when required – to decommission the safety feature and react to tampering or suspected falsification, and to meet new responsibilities for setting up and managing databases.

NEW CHALLENGES IN DELIVERING THE GOODS

GIRP members are having to adapt to the revised European guidelines on Good Distribution Practice (GDP) – often easier said than done, particularly in complying with complex new requirements on temperatures for delivery to pharmacies. Equipping transportation fleets accordingly demands substantial investments, often for little practical effect. GIRP is raising the risk of disproportionate burdens on healthcare distributors with European Health Commissioner Vytenis Andriukaitis and national GMP/GDP inspectorates.

AN ACADEMY FOR MEDICINES SUPPLY ISSUES

GIRP's Educational Academy (GEA), was created in early 2016, offering practical hands-on information and updates on issues impacting the medicines supply chain.

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THE VITAL LINK IN HEALTHCARE THE VITAL LINK IN HEALTHCARE THE VITAL LINK IN HEALTHCARE THE VITAL LINK IN HEALTHCARE THE VITAL LINK IN HEALTHCARE

▲ GIRP's first ever Supply Chain Conference was a resounding success and featured GDP inspectors from six European countries.



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SUPPLY CHAIN CONFERENCE

GEA's first event, in March 2016, was a conference entitled "Joining Forces for Transportation Optimisation in the Pharmaceutical Supply Chain" at which GDP inspectors from Austria, Belgium, Czech Republic, Estonia, the Netherlands and Spain described the status of national GDP implementation and examined how innovative win-win scenarios can be found to tackling recurring challenges across the supply chain.

INDUSTRY MEMBERSHIP

GIRP is increasingly a forum for the exchange of information between the pharmaceutical industry, healthcare distributors, pharmacies and other partners in the supply chain. GIRP now has seven industry liaison members (Allergan, Merck Biopharma, Merck & Co., Mylan, Sandoz, Servier, Teva), and one retail liaison member (OPHACO). Interest in industry membership is steadily growing.

INDUSTRY RECEPTION

GIRP's annual Industry Reception, to promote links between GIRP members and the pharmaceutical industry, had a record turnout this year. The event, in February 2016, featured presentations from McKinsey, IMS Health and Medicines for Europe, covering market trends, medicines hot topics, best-practice scenarios, and lessons learnt. The ensuing reception provided participants with a unique networking opportunity.

56th ANNUAL CONFERENCE, BELGRADE, SERBIA

Under the title of "Optimising Healthcare - Effective Supply Chain Management", the GIRP Annual Conference in Belgrade in June 2015 focused on collaborative partnerships in managing the pharmaceutical value chain, and the evolving links between the pharmaceutical industry and integrated pharmaceutical full-line wholesalers, with an increasing shift away from a transactional relationship to a strategic partnership.

AUTUMN CONFERENCE

Held in Brussels in November 2015, GIRP's Autumn Conference, entitled "Remunerating pathways for medicines access", sought not to replicate current debates on distinct pricing models but rather to explore how the various approaches take account of the entire supply chain. It aimed to assess how new remuneration models for innovative products can be balanced with remuneration models for access to all medicines.

SAFE SECURE SUPPLY CHAIN AT THE EU LEVEL

GIRP and its members are proud of their record in making sure that the medicines they deliver to pharmacies arrive not only rapidly and safely, but are the real thing. In line with its mission to promote trust, partnership and innovation, GIRP and its members seek to ensure not only medicine safety, but ultimately, patient wellbeing. GIRP has consequently played a leading role in the European response to the challenge posed by deliberate falsification of medicines.



EMVO

The European Commission's Delegated Regulation to implement detailed aspects of the Falsified Medicines Directive, including the safety features, was published in February 2016, with a three-year deadline for coming into effect. It allows for some exemptions, such as the risk-based approach to verification for wholesalers when they receive the products directly from the manufacturing authorisation holders. For instance, products moving between two warehouses of the same wholesaler will not require verification. Italy and Greece are allowed a six-year extension of the deadline for setting up their national verification system (so is Belgium, but it will not take advantage of it).

In 2015 this engagement took a major step forward with the launch of the European Medicines Verification Organisation (EMVO), designed to provide seamless protection to keep falsified medicines out of the legal supply chain, in compliance with the EU Falsified Medicines Directive and its Delegated Regulation. GIRP is one of the founding partners of EMVO, alongside the three principal European associations of manufacturers and marketing authorisation holders (the European Federation of Pharmaceutical Industries and Associations, Medicines for Europe and the European Association of Euro-Pharmaceutical Companies), and the Pharmaceutical Group of the European Union (PGEU).

EMVO is a non-profit organisation created to permit national verification systems across Europe to talk to one another – an essential element in the stakeholder-led approach to end-to-end verification of medicines packs. It will operate as a hub that can link the national databases – or repositories – containing the individual identifier of each medicine pack on the national market.





▲ EMVO foundation day

COUNTRY LEVEL SUPPORT

GIRP is encouraging its national member associations to start working with their own local stakeholders in creating the governance mechanisms for the national medicines verification associations needed to complement and mirror the EU-level system. Although countries may have different approaches, GIRP recommends wholesalers to seek equitable arrangements, including fair and balanced voting rights split between associations of manufacturers and marketing authorisation holders, and associations of wholesalers and pharmacies.

To assist EU national stakeholders, EMVO has created a blueprint for a product verification infrastructure that can be used to comply with the duties imposed by EU legislation, and has selected system providers who can link national stakeholders

into the EMVO system. Agreement was reached with the Council of Europe's EDQM on supervising EMVO's operations, and EMVO now has its own logo. Sonia Ruiz Moran of Spain's General Pharmaceutical Council, holding the PGEU seat, was appointed president of EMVO in June 2015.

As of February 2019, wholesalers in Europe will be responsible for verifying the authenticity of the medicines they handle. That means checking that the identifying codes on the packs they receive from sources other than manufacturers or their pre-wholesalers match the information held by the system. And they will also be responsible for taking appropriate action when they detect any tampering or when they suspect falsification. They will also have the right to play a role in the operation and management of their national repository system.

SSI Schaefer - All from One Source

In April, the worldwide leading warehouse and logistics provider SSI Schaefer presented its latest innovations to help pharmaceutical wholesalers meet requirements for lot and serial number recording, both for fast- and slow-moving products.

2D code recording for fast movers is achieved through the extension of the A-Frame with a single product reading. SSI Schaefer provides an efficient solution with a reading rate of more than 99.5%. Single product reading can also be applied to existing A-Frames.

The proven Batch Pick'n Scan Sorter system for efficient medium mover handling and serial number recording can be combined with the latest addition to the SSI Schaefer shuttle family, the Cuby. This single-level shuttle handles bins and cartons with high speed and provides excellent storage density.

Slow-moving products, returns and refrigerated products can be handled, recorded and stored efficiently with the SSI Rowa, a solution offered together with our partner BD CareFusion. Several dispensing variations (order buffer, central belt) offer a flexible and scalable portfolio.

From slow-moving products to fast movers, SSI Schaefer bundles the whole range of solutions under one umbrella - all from one source.

*For more information, please visit:
<http://www.ssi-schaefer.de/en/home.html>*



GIRP DATA

GIRP is able to provide up-to-date overviews of the pharmaceutical full-line wholesaling market in Europe, based on regular reports from its members. This service is principally for the benefit of members, but information on emerging trends is supplied to other stakeholders and European decision makers to demonstrate the important role of our sector.

▲ An inside glimpse of a pharmaceutical full-line wholesaler's warehouse.



THE EUROPEAN PHARMACEUTICAL FULL-LINE WHOLESALING SECTOR IN 2014

30



COUNTRIES¹

763



WHOLESALERS²

1,526



WAREHOUSES

183,591



DISPENSING POINTS³

518 mio



INHABITANTS

■ EU-26¹ + CH + NO + RS + IS
(excluding RU, GE, TR)

¹ EU-28 without Malta and Cyprus

² National and regional wholesalers

³ Pharmacies, hospital pharmacies
and dispensing doctors

Source: EUROSTAT, GIRP data 2014, IPF research 2016



About IMS Health

IMS Health is a leading global information and technology services company providing clients in the healthcare industry with end-to-end solutions to measure and improve their performance. Our 7,500 services experts connect configurable SaaS applications to 10+ petabytes of complex healthcare data in the IMS One™ cloud platform, delivering unique insights into diseases, treatments, costs and outcomes. The company's 15,000 employees blend global consistency and local market knowledge across 100 countries to help clients run their operations more efficiently. Customers include pharmaceutical, consumer health and medical device manufacturers and distributors, providers, payers, government agencies, policymakers, researchers and the financial community.

As a global leader in protecting individual patient privacy, IMS Health uses anonymous healthcare data to deliver critical, real-world disease and treatment insights. These insights help biotech and pharmaceutical companies, medical researchers, government agencies, payers and other healthcare stakeholders to identify unmet treatment needs and understand the effectiveness and value of pharmaceutical products in improving overall health outcomes.

Additional information is available at www.imshealth.com.

MEDICINES SUPPLIED TO PHARMACIES PER DISTRIBUTION CHANNEL 2014¹



- Full-line wholesalers
- Short-line wholesalers
- Direct from manufacturers

¹ in percentage

Source : GIRP data 2014



GIRP'S NEW EFFICIENCY STUDY

Pharmaceutical full-line wholesalers form an essential part of the supply chain for pharmaceuticals by providing a vital link between manufacturers, pharmacies, dispensing doctors, hospitals and ultimately, the patients.

GIRP and the Institute for Pharmaeconomic Research (IPF) in Vienna, Austria are updating their 2011 study "The distribution profile and efficiency of the pharmaceutical full-line wholesale industry". The new study seeks to paint a comprehensive and up-to-date picture of the pharmaceutical wholesale sector by outlining its socio-economic importance from both an economic and a public health point of view.

Focusing on the six key European markets – Germany, France, Italy, the Netherlands, Spain and the UK – the study shows that the continuous supply of medicines in Europe involves billions of transactions between pharmacies, wholesalers and manufacturers each year. Due to their effective bundling function¹, wholesalers

¹ Bundling : The combining of products from different manufacturers in one delivery tote.

ADDED-VALUE SERVICES PROVIDED BY PHARMACEUTICAL FULL-LINE WHOLESALERS

MANUFACTURERS

- Aggregating ordering
- Inventory & stock management
- Product recalls
- Marketing and promotion
- Sales reports & statistics
- Pre-wholesaling/pre-financing
- Market access services
- Waste management services
- Direct deliveries
- Product track and trace
- Product quality services

PATIENTS

- Guaranteed product quality
- Patient self-management
- Patient-specific blistering
- Patient training
- Homecare
- Patient compliance and adherence
- Pharmacovigilance services
- Patient communication services
- Patient monitoring
- Appointment and refill reminder calls

PHARMACEUTICAL FULL-LINE WHOLESALER

PHARMACIES

- Automated order processing
- Just-in-time delivery
- Financial services, sales and purchase analysis
- Micrologistics
- Product recall
- Marketing support

SOCIETY

- War and national emergency stocks
- Chronic disease management programmes
- Positive effect on employment
- Value-added to overall economy
- Crisis management
- Waste management
- Travel health clinics

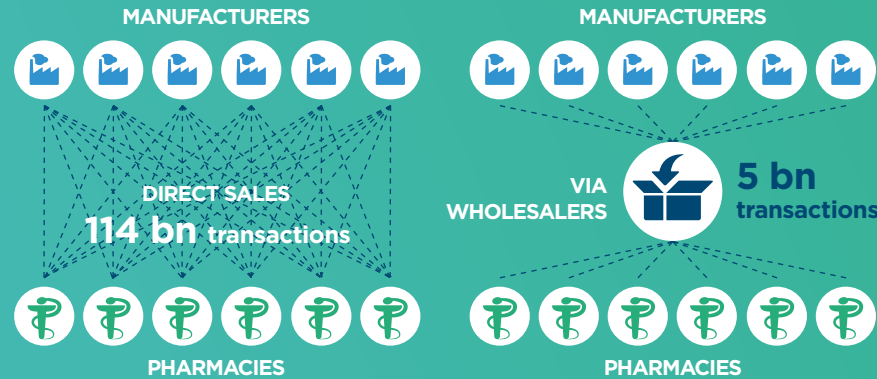
▲ Pharmaceutical full-line wholesalers not only stock and distribute medicines - they offer many added-value services.

dramatically reduce the amount of transactions from 114 billion to 5 billion transactions each year.

Pharmaceutical full-line wholesalers have an important and unique position in the pharmaceutical supply chain. On average, pharmaceutical full-line wholesalers pre-finance the entire medicines market by providing €12.5 billion over a period of 47 days, thereby securing the cash-flow of social-insurers. Also, due to the fact that they – on average – bundle products from 16 different manufacturers in every delivery and distribute medicines 16 times per week, levels of satisfaction among pharmacists with the full-line wholesaling model remain extremely high.

Special functions like the pre-financing of the entire medicinal product market or the rapid delivery of a full range of medicines and medicinal products are vital to the continuous supply of medicines whenever and wherever they are needed most.

WHOLESALE VS. DIRECT SALES FROM MANUFACTURERS

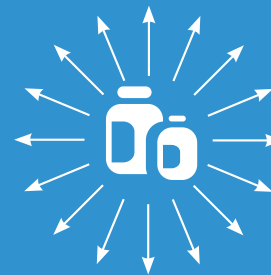


One of the most important functions of wholesalers is the pooling of orders.

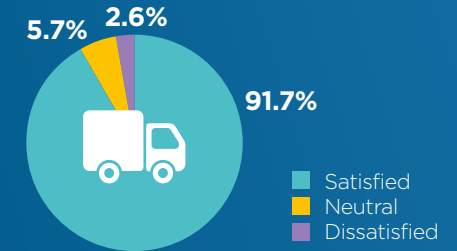
If medicines were supplied directly, each pharmacy would have to contact each manufacturer in order to obtain a complete assortment of medicines.

Source: IPF research 2016, EUROSTAT

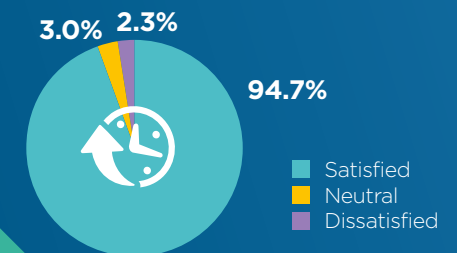
If manufacturers delivered their products directly to pharmacies without the aid of wholesalers, then the number of transactions would increase from 5 bn to 114 billion transactions per year!



PHARMACISTS' OVERALL SATISFACTION WITH PHARMACEUTICAL FULL-LINE WHOLESALERS' SERVICES¹



PHARMACISTS' OVERALL SATISFACTION WITH PHARMACEUTICAL FULL-LINE WHOLESALERS' DELIVERY TIME¹



¹ DE, FR, IT, UK
Source: Pharmacy questionnaire, IPF research 2016

WHOLESALE'S¹ PRE-FINANCE MEDICINES SUPPLIES WORTH €12.5 BN EVERY 47 DAYS



¹ Germany, Spain, France, Italy, the Netherlands and UK

Source: GIRP data on file, IPF research 2016

MULTIPLIER EFFECTS ON VALUE ADDED AND EMPLOYMENT



An in-depth analysis of DE, UK, FR, IT, ES and the NL reveals a multiplier effect of 1.98, e.g. one job created in the pharmaceutical wholesale industry generates 1.98 jobs in the economy as a whole

1 Euro invested in the pharmaceutical wholesale industry generates about 2 Euros in the economy

Source: IPF research 2016, EUROSTAT

REDUCTION OF PROCESS COSTS FOR PHARMACIES DUE TO WHOLESALE'S SERVICES



Assuming the same delivery frequency, the process costs would increase by €204,852 per year, if there were no pharmaceutical full-line wholesalers.

Source: EUROSTAT, Pharmacy questionnaire, IPF research 2016



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Risk Assessment, Documentation, Key Performance Indicators, Continuous Improvement and Security are major topics addressed in recent global regulatory documents, such as the European Falsified Medicines Directive, the 2013 Good Distribution Practices Guidelines for Pharmaceutical Products - now also for Active Pharmaceutical Ingredients - or the WHO Series of Technical documents added to its famous Annex 9 "Model Guidance for the storage and transport of time- and temperature-sensitive pharmaceutical products".

All actors in the Supply Chain must now understand and support a full mapping of the chain. Sticking to one's own part of the distribution is no longer acceptable to regulatory agencies.

Sensitech, together with its logistics security division FreightWatch International, offers a broad range of Supply Chain Visibility Solutions supporting these requirements. These solutions will enable you to be proactively regulatory compliant, in control of your products' quality and to optimize your supply chain all to assure patient safety.

For further information, please visit: <http://en.sensitech.com/>



Estimated costs for the refurbishment of the current vehicle fleet:

€170 mio

(increased maintenance & energy costs not included)

Source: GIRP data 2014



Pharmaceutical wholesalers use around 30,000 vehicles in the EU for their deliveries

Source: GIRP data 2014

ADDRESSING SUPPLY CHAIN ISSUES: AN ACADEMY FOR LEARNING

GIRP's Educational Academy (GEA), was created in early 2016, offering practical hands-on information, workshops and updates on issues impacting the medicines supply chain. With GIRP members' increased product and service offer, the GEA serves as a forum for collaboration and partnership between supply chain partners in order to create win-win scenarios that ultimately benefit the safety and wellbeing of the patient. It is a space for learning, dialogue and exchange among everyone involved in maintaining supply chain efficiency, quality

and safety, and caters to supply chain executives, directors, managers, responsible persons and GDP-trained staff. It also offers the chance to learn from exchanges with staff of national medicines inspectorates and agencies through conferences and issue-specific workshops. By encouraging all participants in the medicines supply chain to work together, GIRP's GEA reflects not only the importance that cooperation with supply chain partners has gained for GIRP, but also reaffirms and substantiates the association's name change.



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: <http://cappi.fr/>

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SUPPLY CHAIN CONFERENCE

GEA's first event, in March 2016, was a conference entitled "Joining Forces for Transportation Optimisation in the Pharmaceutical Supply Chain" at which Good Distribution Practice (GDP) inspectors from Austria, Belgium, Czech Republic, Estonia, the Netherlands, and Spain described the status of national GDP implementation and examined how innovative win-win scenarios can be found to tackling recurring challenges across the supply chain. Based on their early inspection experiences, they pointed to where work still remains to be done. An Austrian transportation code that has been jointly developed by authorities, industry and wholesalers was presented as a best-practice example of cooperation in developing and communicating clear expectations between the authorities and the pharmaceutical supply chain, as well as between industry and wholesalers.

The conference allowed an international audience of around 100 healthcare distributors, manufacturers and inspectorates to explore pragmatic ways of guaranteeing product quality and safety while ensuring the final stage of distribution is efficient and cost effective. In particular experts in supply chain management, logistics, temperature-control monitoring and quality management talked about how the new GDP guidelines will impact the way that medicines move from production to patient in Europe – a particularly complex challenge for final delivery by wholesalers. Pharmaceutical full-line wholesalers deliver

15 billion packs of medicines per year and carry products from an average of 16 manufacturers in one delivery tote. The medicine packs sometimes carry as many as 60 different temperature indications for storage and transport, something that current delivery vans are not always equipped to provide. GIRP members have calculated that in order to strictly comply with "Controlled Room Temperature" (15-25°C) requirements during transport, a refurbishing of the entire current transportation fleet in Europe would cost €170 million with additional €107 million of yearly running costs.

As 93% of conference attendees considered the event to have been 'good' or 'very good', GIRP has already scheduled a second Supply Chain Conference for 8-9 March 2017 to address risk assessment management and product serialisation.



One delivery tote comprises on average 35 products from **16** different manufacturers

Products contain as many as **60** temperature indications for medicines storage and transport

Pharmaceutical wholesalers deliver **15 billion** packs of medicines and healthcare products per year.

This corresponds to **62 million** packs per working day and **7.78 million** packs per hour!

Source: IPF research 2016

▲ GEA's first event was a resounding success. GIRP's panellists discuss temperature controlled transport at GIRP's Supply Chain Conference.



HEALTHCARE @ THE VITAL LINK IN HEALTHCARE @ THE VITAL LINK IN HEALTHCARE



Dear GIRP Members,
Dear Sir or Madam,

Implementing the GDP guidelines poses an increasingly significant challenge for the pharmaceutical supply chain. Harmonised rules across Europe and the processes derived from them require a strong representation of interests in order to meet the demands of the regulations, and this is provided by GIRP and its members.

The diverse possibilities concerning the technical implementation of the aforementioned processes also require forward-thinking technological partners. The proposed solutions developed by KNAPP, such as the OSR ShuttleTM with different temperature ranges, the KNAPP-Store with integrated cold storage or the software processes implemented in KiSoft One, are significant contributions in responding to the requirements of the GDP guidelines.

The regular discourse between KNAPP as technological partner and GIRP, particularly the GIRP members who are also prepared to take on a pioneering role with the proposed solutions, is crucial.

In light of this, we would like to thank you for the excellent cooperation until now and we look forward to continuing to be an effective partner in the future.

Horst Matzer
Director Business Area Solutions
KNAPP AG

56TH ANNUAL CONFERENCE, BELGRADE, SERBIA

Under the title of “Optimising healthcare – effective supply chain management”, the GIRP Annual Meeting and Conference in Belgrade, Serbia in June 2015 focused on collaborative partnerships in managing the pharmaceutical value chain. Preceding GIRP’s name change in November 2015, the conference explored the evolving links between the pharmaceutical industry and integrated pharmaceutical full-line wholesalers, in which the earlier transactional relationship is shifting towards a strategic partnership. This was GIRP’s most well-attended Annual Meeting and Conference in its recent history.

In addition to a focus on the Serbian pharmaceutical supply chain, the meeting also reflected on the growing impact of specialty medicines on distribution, on patient-centred integrated care programmes, and on how corporate responsibility can make good business sense.

GIRP also announced that five pharmaceutical manufacturers from both the generic and the research-based sides of the industry had joined a new category of membership designed to support the evolving relationship. Oliver Windholz, Chief Executive Officer, PHOENIX Group, highlighted how collaboration with the pharmaceutical industry is resulting in higher sales volumes, mutually beneficial models, cost saving synergies, fewer stock-outs, and productivity gains along the entire distribution chain. He regards these developments “as a collaborative relationship which is part of a ‘value chain management’ proposition and needs to be seen beyond ‘supply chain management’”.

▶ Top: GIRP’s Annual Gala Dinner at the Palace of Serbia.
Middle: Discussing market trends in our host country: Serbia.
Bottom: Thanks to our Serbian hosts for GIRP’s warm welcome to Belgrade!



3RD REGIONAL MEETING, VIENNA, AUSTRIA

"WE ARE NOT ONLY CONCERNED ABOUT DELIVERING PHARMACEUTICAL PRODUCTS, WE ARE ALSO FOCUSED ON CREATING AND OFFERING TAILORED SERVICES THAT SUPPORT THE DELIVERY OF PRODUCTS SO THAT PATIENTS CAN ACHIEVE BETTER HEALTHCARE OUTCOMES."

Monika Derecque-Pois
Director General, GIRP

GIRP's 3rd Regional Meeting took place on 27 April 2016 in Vienna, Austria and focused on country specific issues in Central and Eastern Europe. GIRP members shared current and future challenges for Central and Eastern European markets. They also discussed the implementation of national medicines verification systems, the latest results of GIRP's IPF study (conducted in partnership with the Institute for Pharmaeconomic Research (IPF) in Vienna), as well as the latest health policy developments at the European level.



▲ This year's Regional Meeting attracted participants from across Europe.



Transparent Markets with INSIGHT Health

The development of innovative medication in highly specialised indications comes with challenges for all actors in the pharmaceutical supply chain. With the help of market analyses trends can be identified easily and therefore considered in advance.

Market information of INSIGHT Health depicts sales and supply chain developments in the pharmaceutical market for several European countries.

In the analysis of our broad data systems we observe the increasing divergence in the different segments calling for specific marketing strategies.

Specialised Medication

While the sales volume in some sectors shows only poor growth or even stagnation, the disproportionately high developments in the field of expensive specialised treatment options change the established processes in the pharmaceutical supply chain. For the next years we expect these trends to extend.

Trend Reports

As information provider in the health care industry it is part of our business to create transparency with trend reports and market analyses. As neutral partner we set a high value on neutral evidence.

INSIGHT Health is glad to support the GIRP members and other actors in the pharmaceutical industry with individual solutions. For data-based decisions in a changing economic environment.

*For further information, please visit:
<http://www.insight-health.de/en>*

AUTUMN CONFERENCE 2015

GIRP's Autumn Conference, held in Brussels in November, was entitled "Remunerating pathways for medicines access". Against the background of the many current discussions of new remuneration models for medicines, the agenda explored how to establish fair remuneration for wholesale distributors for their role in ensuring access to medicines for patients. The aim was not to replicate the many parallel debates on distinct pricing models, but rather to explore how the various approaches take account of the entire supply chain.

The central point at issue is how new remuneration models for innovative

products can be balanced with remuneration models for access to all medicines. The calculation needs to take account of the fact that GIRP members contribute to medicines access both in relation to affordability – through their pre-financing function – and to availability – through their delivery of healthcare products whenever and wherever they are needed.

The programme featured speakers from GIRP's new liaison members in the industry and the retail sector, as well as representatives of the generic and research-based industries.

GIRP LUNCH RECEPTION AT THE EUROPEAN PARLIAMENT 2015

Every year, GIRP organises a Lunch Reception at the European Parliament in Brussels. The reception, hosted by senior Members of Parliament (MEPs), provides GIRP's members with a unique opportunity to update and inform MEPs, other European institutions, and our partners in the healthcare supply chain about the impact of upcoming legislation on our sector and new sectoral developments.

This year, MEP Giovanni La Via, Chairman of the European Parliament's Committee on the Environment, Public Health and Food Safety (ENVI) as well as MEP Julie Girling, Member of European Parliament for South West England and Member of ENVI, welcomed GIRP's members to the Parliament to discuss the important issue of 'Ensuring the safety and quality of medicines access in Europe'



Each year, Members of the European Parliament host GIRP's Lunch Reception.

◀ GIRP members discuss 'Remunerating pathways to medicines access'.



INDUSTRY MEMBERSHIP

In 2015, GIRP introduced a new class of membership specifically for pharmaceutical manufacturers in order to strengthen collaboration within the supply chain and to shape the future of healthcare provision together.

GIRP's members are providing value and efficiency through their evolving and innovative range of products and services offered to the full supply chain, such as patient-oriented, tailored services

that contain costs, improve adherence to medication and enhance treatment outcomes. As such, GIRP seeks to establish closer networking and collaboration opportunities with the pharmaceutical industry in order to develop patient-centred solutions to support healthcare professionals in delivering patient care programmes to the right patient, with the right medication, at the right time, in the right place.





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 33 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 the health and wellbeing of patients across Europe.

GIRP TEAM



Monika Derecque-Pois
Director General



Martin FitzGerald
Deputy Director General



Giulia Colombo
Regulatory Affairs Manager



Katharina Hoegl
Economic and European Affairs Manager



Viktoria Keri
Communications and Event Manager



Mihai Rotaru
Corporate Affairs Manager



750+
pharmaceutical full-line wholesalers



stock and deliver
100,000
products in



33¹
European countries



3,500
manufacturers



140,000
employees



safe and efficient supply to more than
180,000
pharmacies and healthcare professionals

¹ EU-28 (without Malta and Cyprus) + Georgia, Iceland, Norway, Russia, Switzerland, Serbia, Turkey

Source: GIRP Data 2014



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

GIRP COMMITTEES

Committees

- Economic and Social Affairs Committee
- Legal Affairs Committee
- Public Affairs and Policy Committee
- Technical Committee

Advisory Councils

- Advisory Council Retail
- Advisory Council Supply Chain Solutions

Project Group

- Patient Adherence and Homecare



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GIRP BOARD



Mr. René Jenny
GIRP President



Mr. Olivier Brochain
GIRP Vice-President
General Director,
SECOF



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



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



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



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FULL MEMBERS, ASSOCIATIONS, COMPANIES

 AUSTRIA	PHAGO Verband der Österreichischen Arzneimittelvollgroßhändler	 GREECE	PAPW Panhellenic Association of Pharmaceutical Wholesalers and Qualified Pharmacists	 POLAND	Pelion
 BELGIUM	NVGV – ANGR Association Nationale des Grossistes-Répartiteurs en Spécialités Pharmaceutiques	 HUNGARY	HAPW Hungarian Association of Pharmaceutical Wholesalers	 PORTUGAL	GROQUIFAR Associação de Grossistas de Produtos Químicos e Farmacêuticos
 BULGARIA	BATEL Bulgarian Association of Pharmaceutical Wholesalers	 ICELAND	Distica	 ROMANIA	ADRFR Asociația Distribuitorilor și Retailerilor Farmaceutici din România
 CROATIA	PHOENIX Farmacija, Medika, Oktal Pharma	 IRELAND	PDF Pharmaceutical Distributors Federation	 SERBIA	Serbian Chamber of Commerce - Group of Pharmaceutical Wholesalers
 CZECH REPUBLIC	AVEL Asociace velkodistributorů lé iv / Czech Association of Full line Wholesalers	 ITALY	ADF Associazione Distributori Farmaceutici	 SLOVENIA	TZS Slovenian Chamber of Commerce, Pharmaceutical Full-line Wholesalers
 DENMARK	MEGROS Foreningen af medicingrossister / Danish Association of Pharmaceutical Wholesalers	 LATVIA	LZLA Latvian Association of Pharmaceutical Wholesalers	 SLOVAKIA	ADL Asociácia Dodávateľov Liekov a Zdravotníckych Pomôcok / Association of Drugs and Healthcare Equipment Suppliers
 ESTONIA	ERHL Estonian Association of Pharmaceutical Wholesalers	 LITHUANIA	LAPW Lithuanian Association of Pharmaceutical Wholesalers	 SPAIN	FEDIFAR Federación Nacional de Asociaciones de Mayoristas Distribuidores de Especialidades Farmacéuticas y Productos Parafarmacéuticas
 FINLAND	ATY APTEEKITAVARA TUUKKUKAUPPIAAT ry. / Finnish Association of Pharmaceutical Distributors	 LUXEMBOURG	GGRLPP Groupement des Grossistes Répartiteurs Luxembourgeois en Produits Pharmaceutiques	 SWEDEN	LDF Läkemedelsdistributörsföreningen / Swedish Association of Pharmaceutical Wholesalers
 FRANCE	CSRP Chambre Syndicale de la Répartition Pharmaceutique	 NETHERLANDS	BG Pharma	 SWITZERLAND	Pharmalog Swiss pharma logistics association
 GERMANY	PHAGRO Bundesverband des pharmazeutischen Großhandels	 NORWAY	NAPW Norwegian Association of Pharmaceutical Wholesalers	 UNITED KINGDOM	HDA UK Healthcare Distribution Association

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