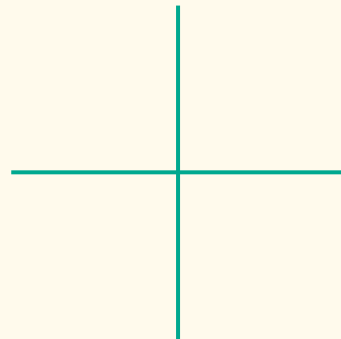
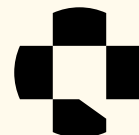


European Federation of Pharmacy Chains



Annual report 2025



EUROPEAN
FEDERATION
OF PHARMACY
CHAINS

Annual report 2025

Content

6	Foreword
10	Membership
14	Highlights of the Year
24	Executive Director Letter
28	About
30	The EFPC Executive Team
32	Financial Report
34	Contact

Foreword

Letter from the EFPC Head of Executive Board

Dear Colleagues,

2025 was an intense and productive year for EFPC, marked by important developments at both European and national levels. As healthcare systems across Europe continue to evolve in response to ongoing geopolitical, economic and public health challenges, the role of pharmacy networks in ensuring reliable access to medicines and patient-centred services has become more critical than ever. The decisions taken today will have a lasting impact on the future of our sector, which is why continued cooperation and a strong, unified voice at EU level remain essential.

We have been witnessing a steady increase in the importance of pharmacy networks in medicines supply, and with this comes growing responsibility. EFPC has remained fully committed to supporting its members, contributing to the development of the sector, and strengthening the role of pharmacies within healthcare systems across Europe.

A key milestone of the year was the high-level roundtable held at the European Parliament in Brussels on 11 June, titled “Towards the Optimal Model for Regulating Pharmacy Markets in Europe – Is Europe ready for a new philosophy of regulation of the pharmaceutical distribution market?” Organised in cooperation with Members of the European Parliament, the event brought together policymakers, industry representatives and experts to discuss the future of pharmaceutical distribution in Europe.

The discussion took place against the backdrop of recent global and regional challenges, which have underlined the strategic importance of resilient and efficient pharmaceutical supply chains. A central theme was the fragmentation of regulatory approaches across Member States, with participants highlighting



Karolina Korodi, Head of the Executive Board, EFPC

the need for a more coherent and balanced framework at EU level. The debate also addressed the relationship between wholesale and retail distribution, as well as its impact on patient access to medicines and the quality of services.

Another highlight was the EFPC Academy 2025, hosted for the first time in Bulgaria by the Bulgarian Association of Pharmaceutical Wholesalers and Retailers (BAPWR) on 1–2 October in Sofia. The event brought together more than 80 pharmacists, institutional representatives and opinion leaders from across Europe. This year's Academy focused on the growing role of artificial intelligence and its impact on pharmacy practice and pharmaceutical care.

The programme combined both practical and policy-oriented perspectives. Participants visited the Faculty of Pharmacy at the Medical University of Sofia, gaining insight into innovative education and training approaches, as well as several community pharmacies to explore modern pharmacy models in practice. The second day of discussions addressed regulatory developments, the positioning of pharmacies across different European markets, and the future of pharmaceutical care, including digitalisation, online pharmacy services and evolving patient expectations. The Academy once again confirmed its role as a key platform for the exchange of knowledge, best practices and forward-looking ideas within the European pharmacy community.

The continued expansion of EFPC remains a strategic priority, as we aim to strengthen our representation and ensure that the voice of pharmacy chains is heard across as many European countries as possible.

I would like to extend my sincere thanks to all our members and partners for their commitment, collaboration and active engagement throughout the year. I am confident that, together, we will continue to build on these achievements and deliver further progress in 2026.

Kind regards,

Karolina Korodi

Membership

Data for the entire Federation:

Pharmacies represented by EFPC member
associations: **7 207**

Pharmacists and pharmacy assistants represented
by EFPC: **38 289**

Number of pharmacies in all member countries: **35 535**

Bulgaria

Bulgarian Association of Pharmaceutical Wholesalers and Retails (BAPWR)

- Number of pharmacies: 3 252
- Number of pharmacies under association: 369
- Number of pharmacists and pharmaceutical assistants under association: 2 965

Czech Republic:

Czech Association of Pharmacy Chains Operators (APLEKS)

- Number of pharmacies: 2 670
- Number of pharmacies under association: 1 045
- Number of pharmacists and pharmaceutical assistants under association: 6 322

Hungary:

HGYSZ

- Number of pharmacies: 2 244 (+663 branch pharmacies)
- Number of pharmacies under association: 480
- Number of pharmacists and pharmaceutical assistants under association: 2 500

Poland:

Association of Pharmaceutical Employers PharmaNET

- Number of pharmacies: 11 077
- Number of pharmacies under association: 2 000

- Number of pharmacists and pharmaceutical assistants under association: 12 000

Romania:

Association of Pharmaceutical Wholesalers and Retailers in Romania (ADRFR)

- Number of pharmacies: 10 148 (pharmacies + drugstores)
- Number of pharmacies under association: 1 621 (pharmacies + drugstores)
- Number of pharmacists and pharmaceutical assistants under association: 7 003

Serbia:

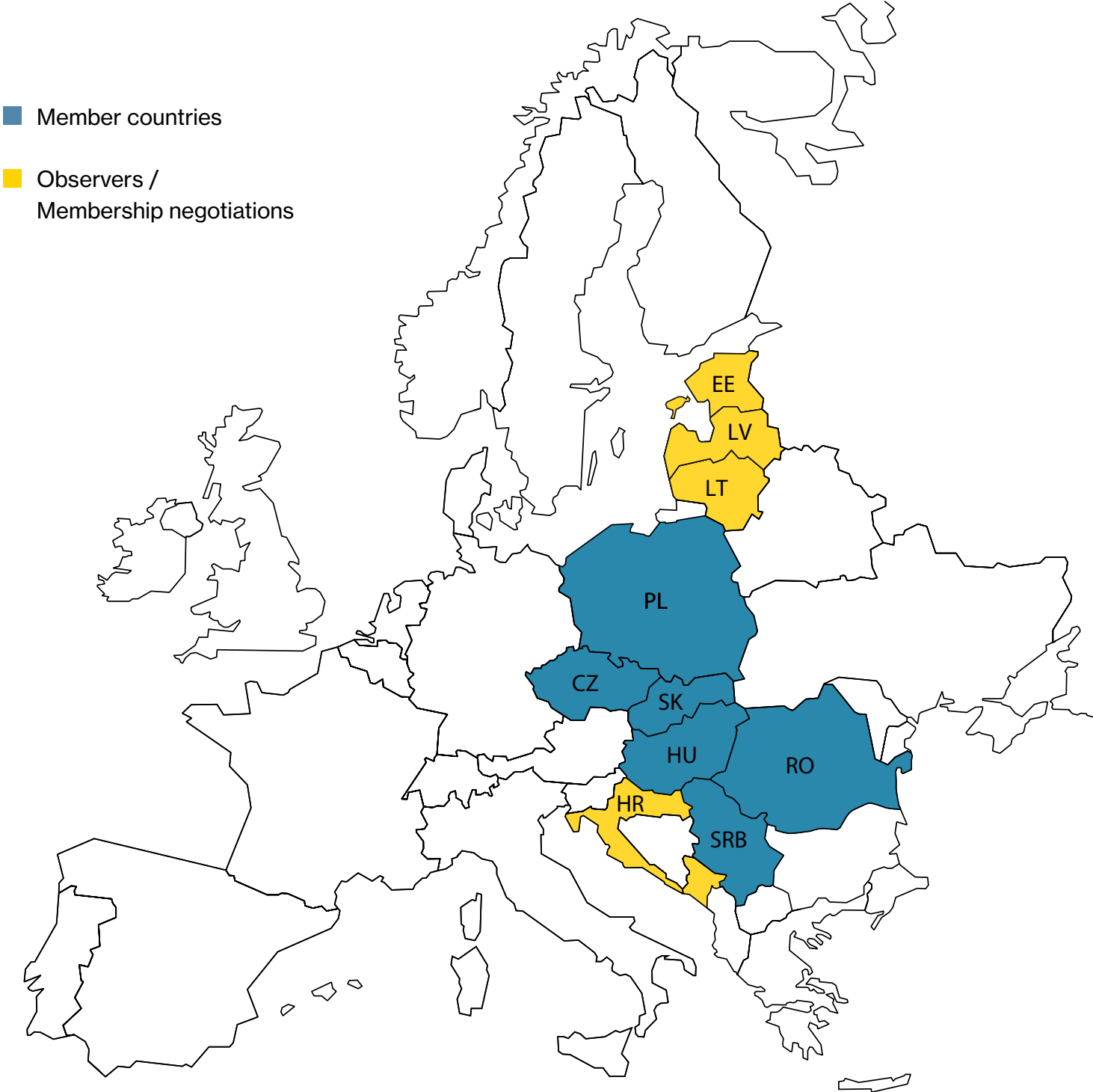
APAL

- Number of pharmacies: 4 026
- Number of pharmacies under association: 1 075
- Number of pharmacists and pharmaceutical assistants under association: 4 550

Slovakia:

Association of Slovak Pharmacy Chains Operators

- Number of pharmacies: 2 118
- Number of pharmacies under association: 617
- Number of pharmacists and pharmaceutical assistants under association: 2 949



Highlights of the Year

EFPC Academy 2025

The Bulgarian Association of Pharmaceutical Wholesalers and Retailers (BAPWR) hosted the prestigious European pharmaceutical event EFPC Academy 2025, held on October 1–2 in Sofia. Each year, the event takes place in a different country, and this was the first time that Bulgaria had the opportunity to welcome over 80 pharmacists, institutional representatives, and opinion leaders from various European countries.

This year, the EFPC Academy focused on the growing role of artificial intelligence and how it is transforming pharmacy and pharmaceutical care for patients across Europe. On the first day of the Academy, participants visited the Faculty of Pharmacy at the Medical University of Sofia – the largest and oldest higher education institution in the field in Bulgaria – to explore innovative practices, learning environments, and technologies supporting the development of Bulgarian pharmacists. As is tradition, the program also included visits to several pharmacies, giving guests a deeper insight into the development of the modern pharmacy in Bulgaria.

The second day of the event focused on the regulatory environment, the positioning of pharmacies, and the advancement of pharmaceutical care in various European countries such as Poland, Serbia, Slovakia, Romania, the Czech Republic, Bulgaria, and others. Special attention was given to the role of today's pharmacy, the opportunities for digitalization, the evolution of online pharmacy services, and the key question of what modern healthcare consumers expect from pharmacies.

“We are extremely pleased that our country hosted such an important event for the European pharmaceutical community for the first time. EFPC Academy is a valuable platform for the exchange of practical experience and knowledge, while its study visits offer participants the opportunity to explore pharmacy concepts and models across different countries. Traditionally, the Academy draws the attention of healthcare professionals, institutional partners, and opinion leaders to various topics related to the future of the pharmacy and pharmaceutical care. We are proud that Bulgaria sparked such interest and





that we had the opportunity to welcome over 80 guests who highly appreciated our modern pharmacy concepts, the quality of pharmaceutical care, and the accessibility of pharmacy services to Bulgarian customers,” said Nikolay Kolev, Chairman of the Board of BAPWR and member of the Board of EFPC.

“EFPC Academy 2025 clearly demonstrated that the future of pharmaceutical care lies in empowering community pharmacists with the right tools, knowledge, and digital support to meet evolving patient needs. The discussions reinforced the pharmacist’s role as a key healthcare professional – not only in ensuring safe and effective supply of medicines, but in guiding patients through an increasingly complex healthcare landscape,” said Irena Storová, Executive Director of EFPC.



Roundtable in Brussels: Towards the Optimal Model for Regulation Pharmacy Market in Europe

Is Europe ready for a new Philosophy of Regulation of the Pharmaceutical Distribution Market?

On 11 June 2025, the EFPC, in cooperation with Members of the European Parliament, organised a high-level roundtable at the European Parliament in Brussels entitled “Towards the optimal model for regulating pharmacy markets in Europe.” The event brought together policymakers, industry representatives and experts to discuss the future of pharmaceutical distribution regulation in Europe.

The discussion took place against the backdrop of recent global and regional challenges, including the COVID-19 pandemic, geopolitical tensions and evolving trade policies, all of which have highlighted the strategic importance of resilient and efficient pharmaceutical supply chains. Participants reflected on how these developments should inform a more coherent and future-proof regulatory framework at EU level.

A key theme of the roundtable was the significant fragmentation of regulatory approaches across European countries. Speakers pointed out that while some Member States operate under highly liberal models, others apply more restrictive frameworks, which can hinder the development of pharmacy markets and, in some cases, raise concerns regarding compliance with fundamental EU freedoms, including the free movement of services and freedom of establishment.

The roundtable also explored the relationship between wholesale and retail pharmaceutical distribution and its impact on patient access to medicines and the quality of services. Particular attention was given to the need to strike a balance between appropriate regulation and market flexibility in order to ensure both patient safety and innovation in service provision.

During the event, EFPC presented the findings of a comprehensive report covering 32 European markets, providing an overview of existing regulatory models and their implications for market performance and patient outcomes. The presentation served as a basis for a broader discussion on identifying best practices and moving towards greater alignment of regulatory standards across the European Union.

The event concluded with a moderated discussion and a joint appeal from Members of the European Parliament and EFPC representatives addressed to the European Commission. The appeal called for a more coordinated and evidence-based approach to pharmaceutical distribution policy, aimed at strengthening the Single Market, improving patient access to medicines and ensuring the long-term sustainability of the sector.



Executive Director Letter

Dear Members and Partners,

2025 has been a year of continued progress and consolidation for the European Federation of Pharmacy Chains. Building on the priorities set at the beginning of my mandate, we have focused on strengthening our role as a trusted partner in shaping the future of pharmacy services and pharmaceutical distribution across Europe.

Throughout the year, our Federation has worked to reinforce collaboration among pharmacy networks, facilitating the exchange of best practices and promoting greater alignment across national markets. In an increasingly complex regulatory and economic environment, this cooperation has proven essential in ensuring that pharmacy chains can continue to deliver accessible, high-quality services to patients.

Advocacy has been another key pillar of our work. We have engaged with European institutions to promote proportionate and transparent regulatory approaches, including in areas such as communication and marketing, where unnecessary restrictions may limit the ability of pharmacy providers to inform and support patients effectively.

We have also continued to advocate for the further development of pharmacists' competencies. Expanding the role of pharmacists in prevention, chronic disease management and patient-centred services remains essential to strengthening healthcare systems and improving patient outcomes.

Ensuring a strong and visible presence at EU level has been a priority throughout the year. Through active dialogue with policymakers and stakeholders, EFPC has further reinforced its position as a constructive and credible voice in discussions on pharmaceutical policy.

At the same time, we recognise that the strength of our sector depends on the people within it. Supporting the professional development of pharmacists and fostering knowledge-sharing across our network remain integral to our mission.



Irena Storova, Executive Director, EFPC

As we look ahead, the challenges facing our sector – from supply chain resilience to regulatory fragmentation – remain significant. However, so do the opportunities. By continuing to work together, we can contribute to a more coherent, innovative and patient-focused pharmaceutical landscape in Europe.

I would like to thank all our Members and Partners for their continued engagement and support.

Warm regards,

Irena Storová

About

On October 10, 2018, with operations set to launch in January 2019 in Prague, the EFPC brought together pharmacy chain associations from the Czech Republic, Slovakia, and Hungary. Later, Poland, Romania, and Serbia joined, and with Bulgaria's inclusion in 2025, the EFPC represents seven member states. The EFPC is the only organization representing pharmacy chains in Europe. It is an independent, voluntary, non-political, and non-governmental organization that cooperates and fosters strong links between European organizations to address issues within the pharmacy sector.

A key part of the EFPC's activities is supporting and protecting the interests of its members, conducting and reporting on surveys related to work issues. Furthermore, the Federation provides educational activities in the pharmaceutical field and advocacy services for its members.

The EFPC was established in response to negative trends in some Central and Eastern European countries that conflict with patient interests. The EFPC is a reliable partner for national and European regulatory authorities, stakeholders, and others, supporting open and constructive discussions in the pharmaceutical sector.

The EFPC Executive Team

The EFPC Executive Director



Irena Storova

The EFPC Executive board



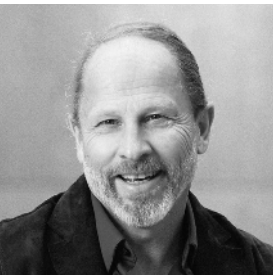
Karolina Korodi
Head of Executive
Board Hungary



Nikolaj Kolev
Bulgaria/Romania



Sina Niku
Slovakia



Petr Doležal
Czech Republic



Marcin Piskorski
Poland

Financial Report

Selected data from the financial statements (in thousands of CZK)

REVENUES IN 2025

Received contributions: 2 568

- Received membership fees: 2 568
- Received financial contributions: 0

Other revenues: 0

- Revenues from services – seminars, courses, professional events: 0
- Received interest: 0
- Foreign exchange gain: 0

Total: 2 568

EXPENSES IN 2025

Consumed purchases: 1 396

- Consumption of materials and energy: 0
- Repairs and maintenance: 0
- Travel expenses: 18
- Representation expenses: 0
- Other services: 1 378

Personnel costs: 0

Taxes and fees: 0

Other expenses: 120

- Foreign exchange losses: 117
- Donations: 0
- Other expenses: 3

Depreciation and sold fixed assets: 0

Provided contributions: 0

Income tax: 0

Total: 1 516

The full format of the financial statements is published in the Collection of Deeds in the Associations Register maintained by the Municipal Court in Prague, Section L file 71221.

The result of the financial year 2025 was a profit of CZK 1 052 which will be transferred to the account “Retained Profit, Unpaid Loss from Previous Years”.

The retained profit from previous years amounts to CZK 1 208 808,66.

Contact

European Federation of Pharmacy Chains

Rybná 716/24
110 00 Prague
Czech Republic

office@eufpc.eu
www.eufpc.eu

ID No.: 07666632

The Federation registered in the Register of
Associations maintained by the Municipal Court
in Prague, Section L file 71221

