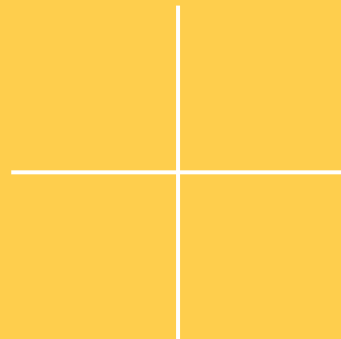


European Federation of Pharmacy Chains



Annual report 2024



EUROPEAN
FEDERATION
OF PHARMACY
CHAINS

Annual report 2024

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Foreword

Letter from the EFPC Head of Executive Board

Dear Colleagues,

2024 was an intense and successful year for EFPC. As highlighted in the title of one of our events, pharmacies are at a crossroads. The decisions made now will have a long-lasting impact on the future of our sector, healthcare systems, and people's daily lives. We are witnessing a steady increase in the importance of pharmacy networks in medicines supply, which means our responsibilities are growing. The EFPC is doing its utmost to meet these expectations and to contribute to the expansion of the sector and the strengthening of patient care

In 2024, we organized two significant events. The EFPC Academy, our traditional meeting, took place in Belgrade in September 2024, with great success. Nearly forty young pharmacists participated, sharing their knowledge on innovative services in pharmacies, vaccinations, and comprehensive public health advice, among other topics.

Another key milestone was the roundtable discussion in Brussels on December 4. Titled „Central European Pharmacies at a Crossroads: Compliance with EU Law, Standards, and Values“, the event brought together MEPs and experts to explore how pharmacies can be better integrated into the preventive healthcare system. We also discussed the next steps to be taken during the Polish Presidency of the Council of the EU in the first half of 2025.

The expansion of EFPC remains a priority to ensure we represent member organizations from as many countries as possible. The Bulgarian Association of Pharmaceutical Wholesale and Retail has expressed its intention to join EFPC, and this was met with strong support from our member organizations. We are also in advanced discussions with other associations from the CEE region.



Karolina Korodi, Head of the Executive Board, EFPC

Finally, I would like to announce a personnel change within EFPC: As of the end of 2024, Mrs. Irena Storová succeeds Mr. Zdeněk Blahuta as Executive Director. I wish her every success in her new role!

I would like to extend my heartfelt thanks to all our partners and member organizations for their hard work and collaboration throughout 2024. I'm confident that together we will continue to achieve great results in 2025.

Best regards,

Karolina Korodi, Head of Executive Board, EFPC

Membership

Mapping the Current Shape and Future Developments

As stated, having a strong member base should be the key plan for coming years. EU headquarters activities in Brussels will be definitely in the centre of our attention and we want to represent our sector as much as possible. There is a clear shift in perception of health topics in Brussels, after shocks like covid and shortages crises in past years there will be more and more attention dedicated to health care system for European patients.

Already now, we symbolize a strong alliance of countries and top chains. In 2024 there was a significant progress in negotiations with Bulgaria that will officially apply for membership at the beginning of 2025. After approval that we expect to happen smoothly, the number of members will rise to 7.

Bulgaria is very much looking forward to join our family - as confirmed by Olia Vassileva, Executive Director at the Bulgarian Association of Pharmaceutical Wholesalers and Retailers (BAPWR):

„We are honored to have concluded the accession process with the European Federation of Pharmacy Chains (EFPC), and we look forward to officially joining in 2025. Our membership in EFPC provides access to a valuable platform for the exchange of experience, knowledge, and best European practices. I believe this is of great importance not only for the members of BAPWR but also for Bulgaria as a whole, as EFPC has established itself as a key partner to European regulatory authorities, institutions, and influential voices within the sector. This membership not only allows us to be more visible on the European map, but also gives us the opportunity to contribute with our national experience. Pharmacy chains, in Bulgaria and across Europe, are among the driving forces behind the modernization of the pharmacy market – often leading in innovation and the implementation of advanced models of pharmaceutical care. We are proud to take part in shaping the future of the sector together with our European partners.“



Olia Vassileva, Executive Director, BAPWR

Federation members

Membership within the EFPC is open to countries in Europe



The power of EFPC

with Bulgaria (joining formally at the beginning of 2025)

Data for the whole federation:

Number of pharmacies in all member countries
+ future member Bulgaria: **37 520**

Number of pharmacies under EFPC member
associations: **6 948**

Number of pharmacists and pharmaceutical assistants
under EFPC: **38 067**

In 2025, we would like to continue our efforts especially in negotiations with Italy, Croatia and Baltics that have been already running. We are in any case very much open to any other membership talks.

Czech Republic:

- Czech Association of Pharmacy Chains Operators
- Number of pharmacies: 2 655
- Number of pharmacies under association – APLS: 826
- Number of pharmacists and pharmaceutical assistants under association: 4 938

Slovakia:

- Association of Slovak Pharmacy Chains Operators
- Number of pharmacies: 2 103
- Number of pharmacies under association – 600
- Number of pharmacists and pharmaceutical assistants under association: 4 500

Hungary:

- HGYSZ
- Number of pharmacies: 2 257 (+647 branch pharmacies)
- Number of pharmacies under association – 450
- Number of pharmacists and pharmaceutical assistants under association: 2 000

Romania:

- Association of Pharmaceutical Wholesalers and Retailers in Romania (ADRFR)
- Number of pharmacies: 11 321 (pharmacies + drugstores)

- Number of pharmacies under association – 1 578 (pharmacies + drugstores)
- Number of pharmacists and pharmaceutical assistants under association: 7 164

Poland:

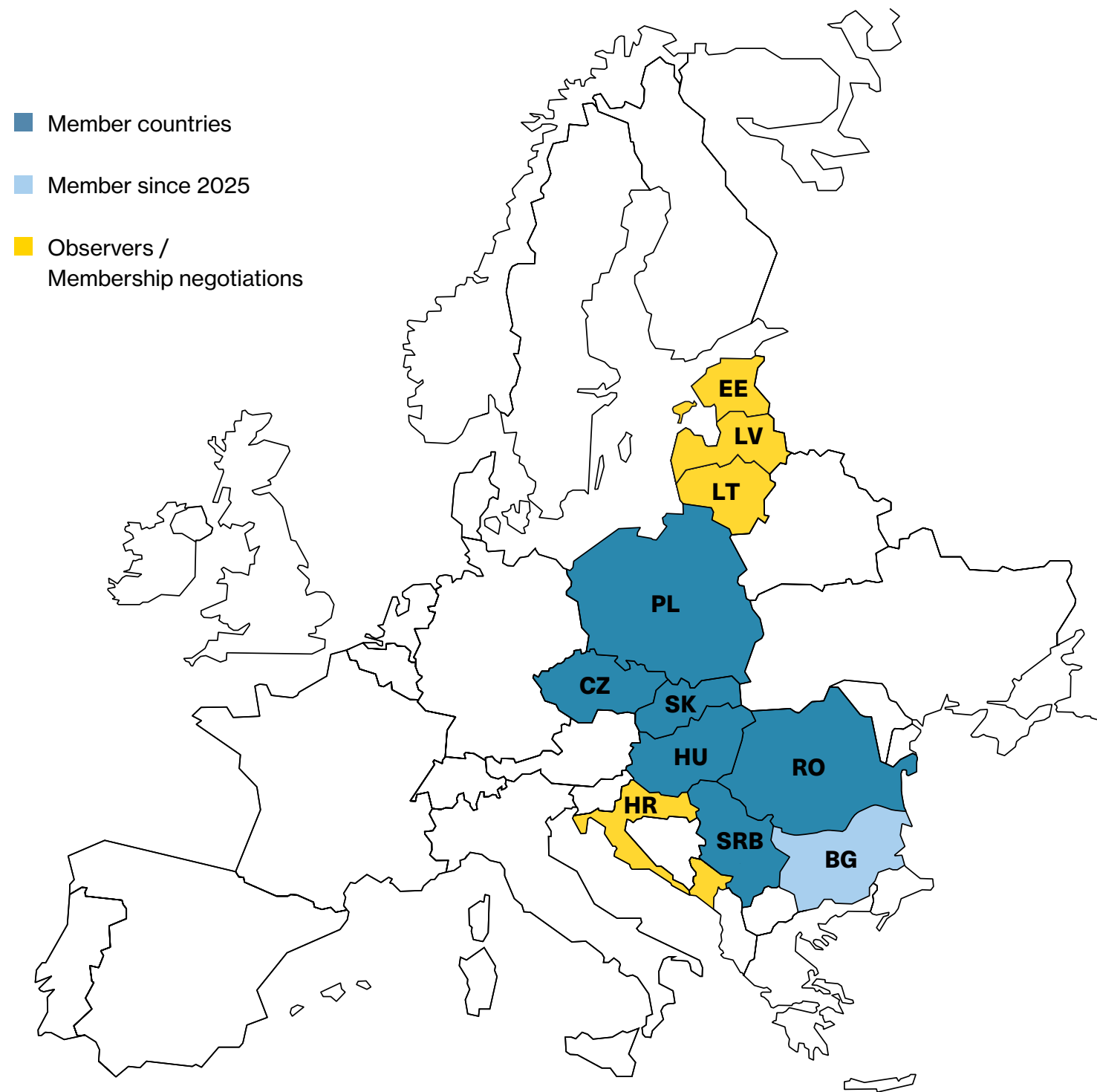
- PHARMANET
- Number of pharmacies: 11 300
- Number of pharmacies under association: 2 000
- Number of pharmacists and pharmaceutical assistants under association: 12 000

Serbia:

- APAL
- Number of pharmacies: 3 985
- Number of pharmacies under association: 1 025
- Number of pharmacists and pharmaceutical assistants under association: 4 500

Bulgaria – expected to join officially in 2025

- 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



Highlights of the Year

EFPC Academy Belgrade, September 25—26, 2024

The 3rd EFPC Academy was held on 25–26 September 2024 in Belgrade. Thirty-two pharmacists from pharmacy chains in the Czech Republic, Hungary, Poland, Slovakia, Romania, and Serbia exchanged information on services provided in pharmacies, covering everything from vaccinations to comprehensive healthcare advice. Our distinguished guest, renowned expert Arijana Meštrović, made a crucial contribution to the EFPC Academy as a key contributor, leading the event with outstanding professionalism. The participants greatly appreciated the opportunity to present the regulations and the pharmaceutical market in their countries, as well as to discuss and exchange experiences with colleagues.

Through the workshops special attention was given to the following inspirations:

- Motivation, time and priority management
- New advanced roles for pharmacists and pharmacy technicians and shared responsibility
- New advanced services and calculating the price for services in respective countries
- Vaccination in pharmacies as an important way to increase access to health services and to strengthen public health
- Training of the pharmacists for further development of the competences

Serbian Association APAL took over the organization of 3rd EFPC Academy. Both pharmacists from BENU, Lilly and Dr. Max in Serbia were a part of organizing team. Marija Golubović Marković, Dr. Max Serbia Head of professional services and PMO said: "I am thrilled that this year's EFPC Academy was a success, both professionally – through the scope of the program, the interactive workshop, the inspiration of participants, and the motivation of pharmacists for professional development – as well as socially, with the event symbolically held on the eve of the Academy, on September 25, 2024, which is World Pharmacists Day. I am also very happy that the efforts put into preparing this year's Academy have paid off."







All participants agreed that they are already looking forward to the 4th Annual EFPC Academy in 2025.

"I would like to thank the whole Serbian organizing team and the trainer Doc. Arijana Meštrović in addition to the participants of the Academy. I strongly believe, and I am very happy about it, that we have managed to maintain the already high standard" says Zdeněk Blahuta, Executive Director of EFPC as of June 2024.



EPFC high level roundtable

European Parliament,

Brussels — December 4, 2024

We are very pleased that during these years we have step by step established a tradition of high level gatherings at the premises of European Parliament. This is perfectly in line with the strategical goal of being more and more active directly at EU headquarters. On 4 December 2024, a Pharmacy Industry Roundtable was held in Brussels under the theme „Central European pharmacies at a crossroads: compliance with the EU law, standards and values“.

The meeting was hosted by Polish MEPs Adam Jarubas and Elżbieta

Łukacijewska and initiated by the European Federation of Pharmacy Chains. Participants in the discussion included:

Adam Jarubas, MEP, Chairman of the Subcommittee on Public Health (SANT)

Elżbieta Łukacijewska, MEP, Committee on the Environment, Public Health and Food Safety (ENVI)

Ondřej Knotek, MEP, Subcommittee on Public Health (SANT)

Tomislav Sokol, MEP, Committee on the Internal Market and Consumer

Protection (IMCO)

Bartłomiej Kurcz, Head of Unit, European Commission Health Emergency Preparedness and Response Authority (HERA)

Vytenis Andriukaitis, former EU Commissioner for Health

Catalina Pintea, Representative of the European Federation of Pharmacy

Chains

The meeting was moderated by Marcin Tomasik (TJSP).

The context of the meeting was the announcements regarding the health priorities of the Polish Presidency of the EU Council, including the announced completion of the pharmaceutical package, as well as the new EU institutional set-up.

The discussion revolved around the competences of nation states to shape health policies in the context of common challenges faced by EU countries and issues of the single market and competitiveness. In his speech, MEP Adam Jarubas, Chairman of the Subcommittee on Public Health (SANT), emphasized the need to harmonize the law on the rules for opening and running pharmacies. This was one of the Federation's demands vis-à-vis the pharmaceutical package, which in its latest form contains only a general mention of pharmacies. MEP Elżbieta Łukacijewska drew attention to the key role of pharmacies in healthcare systems, especially in the face of crises and upcoming challenges. Former EU Health Commissioner Vytenis Andriukaitis argued that the role of pharmacists will become increasingly important in key areas such as drug shortages and reporting, antibiotic resistance, preventive measures targeting patients, implementation of the European Health Data Space (EHDS) or the overall resilience of healthcare systems. Bartłomiej Kurcz, Head of Unit at the European Commission's Health Emergency Preparedness and Response Authority (HERA), also highlighted the important role of the new Commissioner for Preparedness and Emergency Management.

Members of the European Federation of Pharmacy Chains at the event launched an Appeal to the European Commission on the need to include pharmacies in the Pharmaceutical Package. The text of this appeal follows. Social event in the evening closed this successful gathering in Brussels. Czech Deputy Health Minister Jakub Dvořáček was one of those who joined us at Radisson Red Hotel.



Appeal EFPC

Appeal of the EFPC to the European Commission on the need of inclusion of pharmacies in the Pharmaceutical Package

Dear Members of the European Commission,

On behalf of the European Federation of Pharmacy Chains (EFPC), we respectfully urge the European Commission to include pharmacies as an important component in the upcoming Pharmaceutical Package and other EU health initiatives. As key players in Europe's healthcare ecosystem, pharmacies play an integral role in ensuring access to medicines, supporting public health, and enhancing the efficiency of healthcare systems across the European Union.

Pharmacies are an essential part of the healthcare infrastructure in all EU Member States. With over 160,000 community pharmacies across the EU, pharmacies are often the first point of contact for millions of Europeans in need of healthcare advice and treatment, offering critical services in communities both urban and rural. They are trusted healthcare providers, offering a wide array of services, including dispensing medications, patient monitoring and support, health advice and a wide range of new pharmacy services.

Given these diverse and vital functions, pharmacies should not be considered merely as retail points for medicines, but as active healthcare providers capable of delivering patient-centered care. The integration of pharmacies into the Pharmaceutical Package would not only strengthen patient care but also contribute to the overall sustainability of the European healthcare system.

The Pharmaceutical Package presents an opportunity to modernize and improve Europe's pharmaceutical policy, ensuring that it meets the evolving needs of patients and healthcare systems in the 21st century. In this context, the inclusion of pharmacies is both timely and essential and should pursue the following objectives:

Identification of the basic requirements to be met by pharmacy operators.

Pharmacy chains have demonstrated a unique capacity for managing and preventing medication errors, providing guidance on the safe use of pharmaceuticals, and supporting patient adherence to prescribed therapies. The most recent IQVIA report indicates that pharmacy markets with liberal regulations (where pharmacy chains are permitted to operate) promote the growth of new pharmacy services. However, some countries (eg. Poland) face serious problems with pharmacy chains functioning and as such it violates the single market and a principle of non-discrimination of businesses based in different Member States. Therefore, we would like to underline the need of standardization of basic requirements for establishing and running pharmacies across the EU.

In view of EFPC, pharmacies (retail) and pharmaceutical wholesalers are equally crucial elements of medicinal products' supply chains. Whereas the wholesale level is relatively precisely regulated, the pharmacy (retail) level is, to a larger extent, left for Member States to shape at their discretion. Especially with regard to applying for and granting authorisation to run respective business entity.

We believe that, without prejudice of Member States' authority to legislate on the matters of pharmacy and healthcare' respective markets, basic requirements that an entity intending to run a pharmacy ought to satisfy for an authorisation to be granted, should be standardised throughout the Union. There are certain overarching principles, essential for any establishment selling medicines, that can be standardized across the EU for consistency and public safety reasons.

Acknowledge the essential role of pharmacies by promoting development of pharmaceutical care and new pharmacy services.

Given their widespread presence, pharmacies are ideally positioned to reduce barriers to access, particularly in areas where other healthcare services might be less accessible. Pharmacists should to a lesser extent act as drug sellers and to a larger extent as a healthcare system's point of contact for a patient. They not only can provide consultation, whenever such consultation is actually needed, but also cooperate with doctors in patients' treatment, provide drug reviews, administer vaccines, engage in educational campaigns and many others. Such could also contribute to strengthening the competence and pharmacists' reputation.

Pharmacies could play a crucial role in public health initiatives, from preventing the spread of infectious diseases through vaccination programs to managing chronic

conditions such as diabetes, hypertension, and asthma. The Pharmaceutical Package should therefore incorporate provisions to develop standards for the new pharmacy services, ensuring that pharmacies in every Member State have the resources, regulations, and support to deliver quality healthcare services. As a first step, the EU could promote and harmonize rules to facilitate mutual recognition of pharmacists' competences in vaccination across countries.

Support new digital solutions for pharmacist and pharmacies.

One of the key developments in the modern economy, in both manufacturing and services, are the processes of digitalization and automation. Digital infrastructure, such as secure communication systems, allows contact between doctors and pharmacists, improving prescription accuracy and enhancing patient outcomes through real-time collaboration.

The need for automation of some of the services provided in pharmacy (in particular dispensing of medicinal products) is evident in light of development of a function of pharmacists. Being highly trained medical professionals, they can engage in more advanced services for patients, activities which enable their experience and knowledge to be effectively used. Automation can facilitate that process by freeing professionals from duties which do not require this sort of proficiency, meeting the needs of countries facing a severe shortage of pharmacists. Given the sensitive nature of these areas, it is important that the general framework within which Member States should allow automation and digitisation is provided for and promoted in EU law.

Monitoring and management of drug shortages.

One of the main declared objectives of the Pharmaceutical Package is to improve the security of supply of medicines and to ensure that medicines are available to patients wherever they live in the EU. Pharmacies make daily efforts to ensure treatment continuity by mitigating problems caused by medicines shortages. In an emergencies, it is pharmacists who fill this gap by providing patients generic or customised medicines. Sufficiently early notification of supply problems will allow preparation for such situations by ordering pharmaceutical ingredients, that are also affected by the shortage, or by preparing stockpiles of medicines produced by pharmacies.

However, the role of pharmacies and pharmacists seems to be not sufficiently taken into account in measures aimed at securing the supply of critical medicines

across the EU and preventing shortages. To address this shortcoming, it is necessary to establish an effective framework for communicating between all those involved in the pharmaceutical supply chain and the competent authorities. Including pharmacies in this framework should ensure that pharmacies are informed as soon as possible about expected shortages of medicines.

There are several solutions which could serve that purpose. As it is particularly important that the response to drug shortages is as efficient and prompt as possible, we encourage to establish a more streamlined reporting mechanism from MAHs to pharmacies, that would allow for a rapid responses to any concerns, such as ordering pharmaceutical ingredients, that are also affected by the shortage, or by preparing stockpiles of medicines produced by pharmacies.

To sum up, the inclusion of pharmacies in the Pharmaceutical Package is not only a step towards improving the quality of healthcare services across the EU, but it is also an essential move reinforcing the role of pharmacies in the evolving EU healthcare

ecosystems. By recognizing and enhancing the contributions of pharmacies, we can ensure that Europe's pharmaceutical ecosystem meets the high level of public health protection, patient safety and access to safe, effective and affordable medicines today and in the future.

We, the European Federation of Pharmacy Chains, respectfully request that the European Commission acknowledges the critical role of pharmacies in Europe's healthcare system and includes them as a component of the Pharmaceutical Package. We look forward to collaborating with the Commission and other stakeholders in shaping a stronger, more inclusive European pharmaceutical policy.

We remain at your disposal for further discussions and would be pleased to provide additional information if required.

These activities were complemented by individual meetings during the year in Brussels, when EFPC Executive Director Zdeněk Blahuta met key MEPs and other stakeholders to support the agenda of EFPC members. Maintaining a regular presence in Brussels will remain one of the key priorities in the coming years.

Change at Executive Director Post

Irena Storova Replacing Zdenek Blahuta and Her Priorities

On November 15, 2024 there was an important personal change. Mrs. Irena Storova (see her bio below) was elected as a new Executive Director and replaced Mr. Zdenek Blahuta who served at this post before. All members express their warm thanks to Mr. Blahuta for his long dedicated work and contribution to the development of EFPC's activities on European level. At the same time they wish Mrs. Storova a very successful mandate.

Irena Storova is a well established professional. The native of Trebic is an erudite pharmacist - she has a diploma from the Comenius University in Bratislava. Subsequently, Irena joined the pharmacy of the prestigious Hospital Na Homolce where she later worked as chief pharmacist. Between 2010 and 2013 she served at the Ministry of Health of the Czech Republic. Irena also graduated from the Advance Healthcare Management Institute in Prague. An important stage was the position of Director of the State Institute for Drug Control, which she held until 2023.

In the same year, FORBES magazine ranked her among the most influential women in the Czech Republic.

Executive Director Letter

Executive Director Letter

Dear Members and Partners,

It is a great honor to serve as the newly elected leader of the European Federation of Pharmacy Chains in 2024. This year marks an important milestone for our organization as we continue to navigate the evolving landscape of pharmacy services across Europe. With a strong commitment to innovation, collaboration, and advocacy, I am dedicated to strengthening our Federation's role in shaping the future of pharmaceutical care.

Our profession is facing unprecedented challenges, but also incredible opportunities. As we move forward, my priorities will be centered on:

Strengthening Collaboration Among Pharmacy Networks I firmly believe that by working together, we can achieve more. My goal is to foster deeper cooperation among pharmacy chains across Europe, encouraging the exchange of knowledge, best practices, and resources to better serve our communities.

Embracing Innovation Innovation is key to enhancing the efficiency and accessibility of pharmacy services. We will focus on integrating digital health

solutions, expanding e-pharmacy capabilities, and embracing new models of patient care to meet the needs of a rapidly changing healthcare environment.

Advocating Against Marketing Restrictions We must challenge unnecessary marketing limitations that hinder our ability to provide essential information and services to patients. Fair and transparent regulations will ensure that pharmacy chains can operate effectively and meet the evolving expectations of consumers.

Expanding Pharmacy Competencies Pharmacists are at the heart of healthcare, and their role must continue to evolve. I will work to support the expansion of pharmacy competencies, advocating for greater involvement in preventive care, chronic disease management, and telepharmacy services.



Irena Storova, Executive Director, EFPC

Strengthening Our Presence in the EU Ensuring that our Federation has a strong and influential voice in European healthcare policy is one of my key objectives. We must secure a "seat at the table" in legislative discussions to advocate for policies that support the growth and sustainability of pharmacy chains across Europe.

Investing in the Professional Growth of Pharmacists Our profession thrives when pharmacists are equipped with the knowledge and skills to provide exceptional care. I am committed to supporting ongoing professional development through education, training, and networking opportunities.

Expanding Our Membership A strong Federation is one with a diverse and growing membership. By welcoming new members and strengthening our network, we can enhance our collective impact and better advocate for the future of pharmacy services in Europe.

As I embark on this journey, I am excited about the opportunities that lie ahead. Together, we can build a stronger, more innovative, and more influential European Federation of Pharmacy Chains. I look forward to working with all of you to achieve these shared goals.

Warm regards,

Irena Storova

Executive Director, EFPC

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 will represent 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.

Upcoming Events for 2025 and Future Strategy

At the 2024 Members' Meeting in Brussels on December 5, there was an in-depth debate about the next steps. This discussion is planned to continue in Prague in February 2025 in a brainstorming format focused on future strategy. The focus will certainly be on strengthening EFPC's presence in Brussels, raising greater awareness, and carrying out all necessary activities to ensure modern, innovative, and continuously improving care for all European patients. EFPC members have a strong commitment to enhancing the role of pharmacies in health systems in the future.

The EFPC Executive Team

The EFPC Executive Director



Irena Storova

The EFPC Executive board



Karolina Korodi
Head of Executive Board



Nikolaj Kolev
Bulgaria/Romania



Sina Niku
Slovakia



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The Federation registered in the Register of
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