

German Pharmacies

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Pharmacies in the health care system

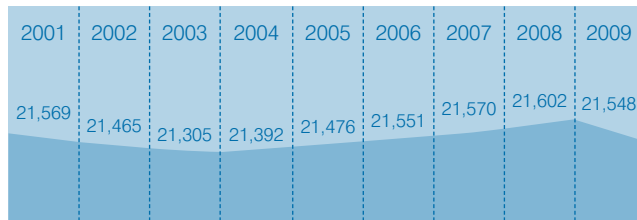
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Community pharmacies

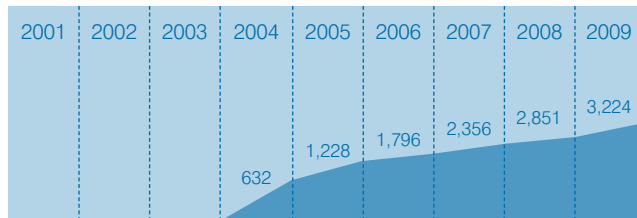


Numbers of pharmacies

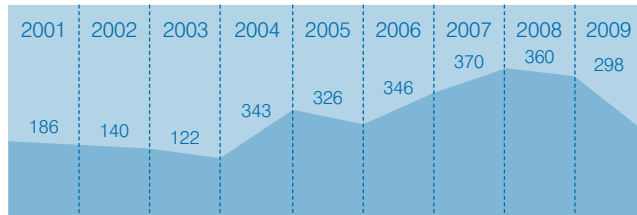
Number of pharmacies (incl. subsidiaries)



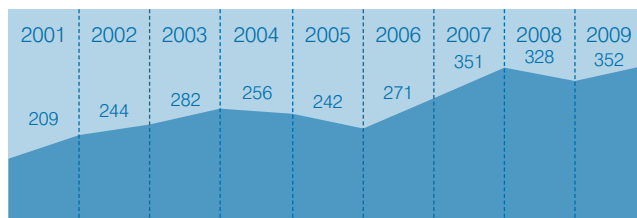
Subsidiaries



Pharmacies opened



Pharmacies closed



Figures as at year-end

Pharmacies in the German states

German state	Public pharmacies in 2009	Independent pharmacies*	Subsidiaries
Baden-Württemberg	2,755	2,364	391
Bavaria	3,439	2,927	512
Berlin	890	741	149
Brandenburg	578	464	114
Bremen	171	148	23
Hamburg	459	393	66
Hesse	1,621	1,380	241
Mecklenburg-West Pomerania	408	347	61
Lower Saxony	2,107	1,795	312
North Rhine	2,507	2,152	355
Westphalia-Lippe	2,230	1,871	359
Rhineland-Palatinate	1,116	987	129
Saarland	338	301	37
Saxony	999	825	174
Saxony-Anhalt	618	511	107
Schleswig-Holstein	735	641	94
Thuringia	577	477	100
Total	21,548	18,324	3,224

Figures as at year-end; * Pharmacies with operating licence in accordance with § 2 of the Apothekengesetz (pharmacy regulations)

Trends in the number of jobs in community pharmacies

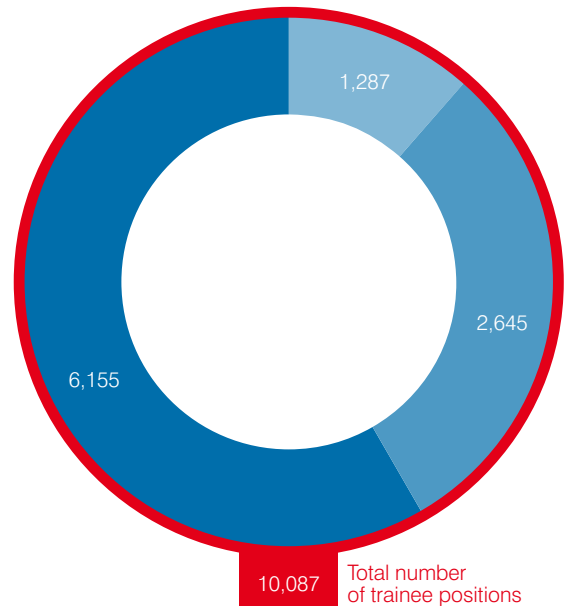
Year-end	2001	2002	2003	2004	2005	2006	2007	2008	2009
Pharmacists	45,869	46,513	46,140	46,014	46,276	46,953	47,766	48,030	48,002
Of which female (%)	65.1	63.6	62.9	65.5	64.8	66.0	66.6	68.5	69.3
Pre-registration trainee pharmacists	1,748	1,520	1,387	1,431	1,534	1,518	1,506	1,327	1,287
Pharmaceutical engineers	10,294	10,218	9,600	9,602	9,266	8,292	8,413	8,196	8,056
Pharmaceutical technical assistants (PTA)	40,805	41,495	42,385	43,946	46,431	48,656	49,874	51,907	53,734
Pharmaceutical commercial employees (PCE) / other	38,614	40,091	37,636	35,812	36,454	38,355	36,026	36,020	35,769
Total jobs	137,330	139,837	137,148	136,805	139,961	143,774	143,585	145,480	146,848

Pharmacists and pharmacy students

Pharmacy trainee positions

Pharmacists			
Pharmacists in:	2008	2009	Percentage of women
Community pharmacies	48,030	48,002	69.3
Of which managers	18,751	18,324	46.7
Hospital pharmacies	1,874	1,890	60.3
Industry, administration, organisation, science	7,575	7,940	58.1
Total employed pharmacists	57,479	57,832	67.5

Pharmacy students	
2004/2005	12,358
2005/2006	12,069
2006/2007	12,128
2007/2008	11,721
2008/2009	12,052



- PCEs in training
- Pre-registration trainee pharmacists
- PTA trainees

Pharmacy services

Approximately 4 million people visit public pharmacies every day.

In 2009, pharmacies

- reported a total of 7,400 suspected cases of medication risks to the Drug Commission of the German Medical Association. Main complaints referred to errors in packaging (30 %), unwanted medication effects and reports of misuse (29 %) as well as galenic deficiency (20 %).
- processed some 16 million prescriptions covered by the statutory health insurance (SHI), 65 % of which were conventional, 20 % methadone, 11 % cytostatic and 4 % parenteral formulation.

Training courses

In 2009, approximately 119,000 people took part in nearly 2,300 training courses offered by the Council of Pharmacists – more than ever before.

Night and emergency service

- Approx. 2,000 pharmacies per night
- More than 20,000 patients per night
- More than 7 million packs provided outside the regular opening hours
- Especially important for children (and their parents): above-average percentage of SHI pharmaceuticals dispensed during night and emergency service is prescribed by paediatricians.

Pharmacy image

87 % of Germans have a high degree of trust in pharmacists ¹

82 % of Germans feel that pharmacies provide good-quality service, and consider them to be some of the best service providers in Germany ²

65 % of Germans go to the pharmacy first when they have minor health issues ³

Grade 2.4 is the mark Germans give to owner-run pharmacies and is equivalent to "good" ⁴

Grade 1.8 is the mark Germans give to owner-run pharmacies concerning healthcare of their children ⁵

Sources (representative surveys)

¹ Reader's Digest 2010

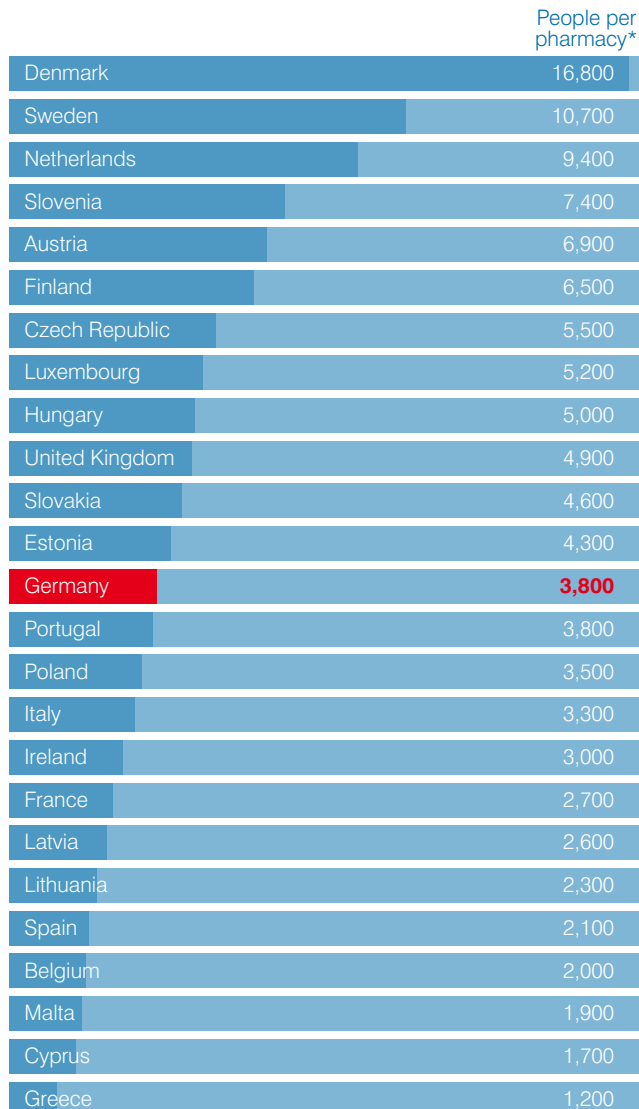
² Allensbach 2008

³ YouGovPsychonomics 2008

⁴ ifas 2008

⁵ ifas 2009

Pharmacy density in Europe



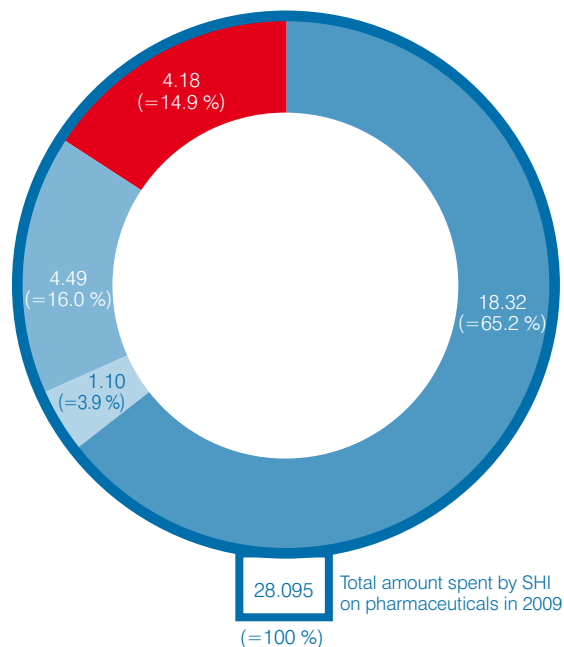
* Germany: ABDA-Statistik 2009; all other countries: last available year according to ÖBIG

Pharmacies in the health care system



SHI expenditure on pharmaceuticals (excl. co-payments)

Distribution of the value added



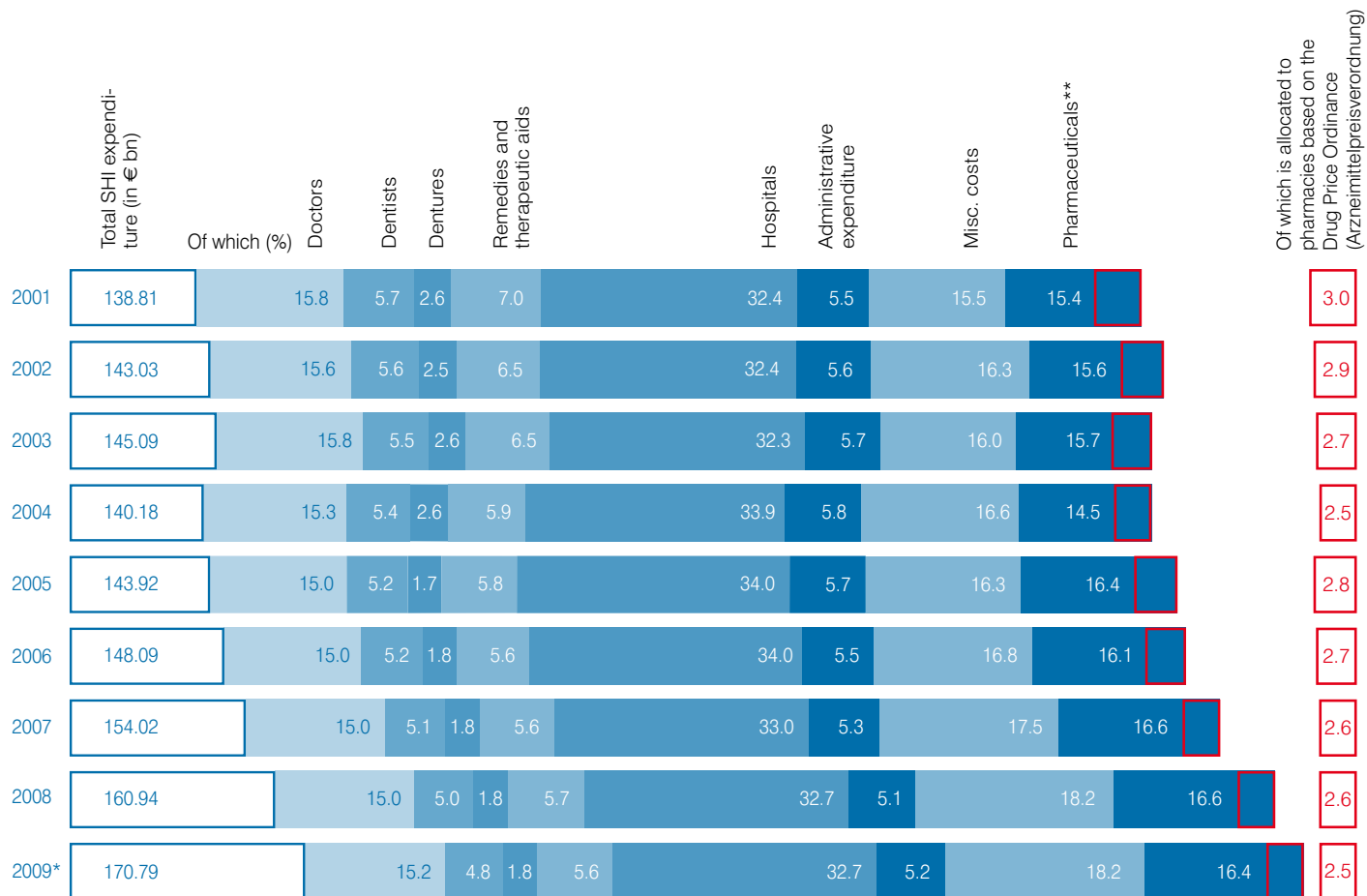
In € bn

- Pharmaceutical industry and purchased materials and services (such as raw materials)
- Pharmaceutical wholesalers
- VAT (exchequer)
- Pharmacies

Every € 100 spent by SHI on pharmaceuticals is allocated as follows:

	2007	2008	2009
Industry	64.00	64.50	65.20
Exchequer (VAT)	16.00	16.00	16.00
Pharmacies	15.90	15.50	14.90
Wholesalers	4.10	4.00	3.90

Allocation of total SHI expenditure



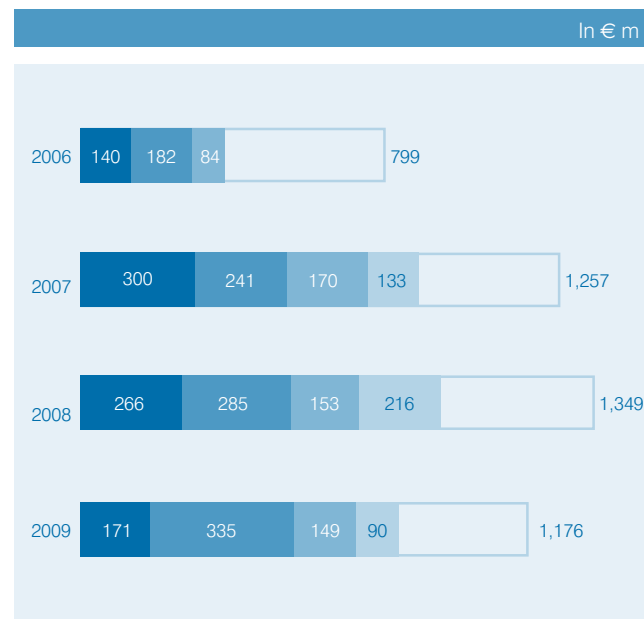
* Provisional

** From pharmacies

Distribution of miscellaneous costs

	in %
Sick pay	4.2
Transportation expenses	2.0
Pregnancy, maternity	1.9
Home care	1.7
Pharmaceuticals from others	1.6
Social services	1.5
Ambulant & inpatient treatment, rehab	1.4
Dialysis in doctors' practices	1.0
Early diagnosis measures	0.9
Others	2.0
Total	18.2

Vaccine sales*

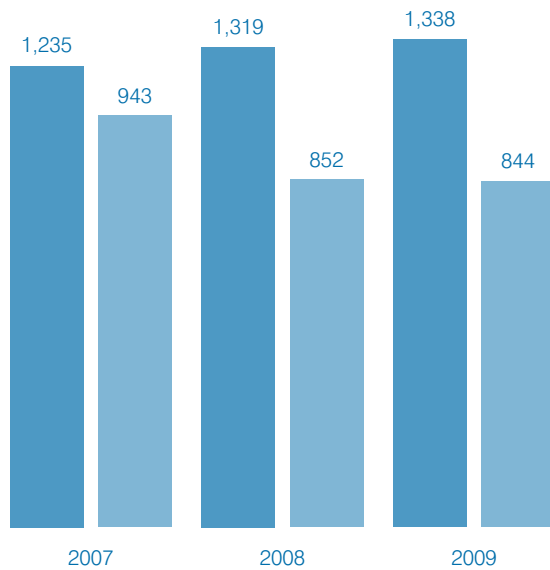


- Of which tick-borne meningoencephalitis
- Of which pneumococcus
- Of which human papillomavirus (HPV)
- Of which flu

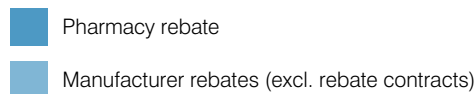
In 2007, vaccinations were included in the SHI catalogue of required services.

* Vaccine against H1N1 ("swine-flu") is not included, as settlement is undertaken by the Federal States.

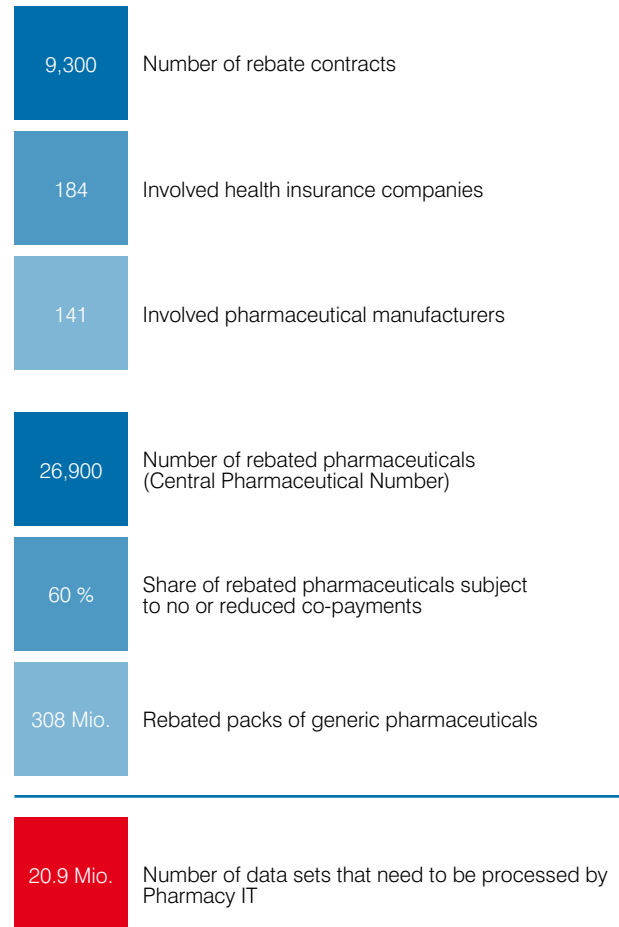
Statutory pharmacy and manufacturer rebates



In € m



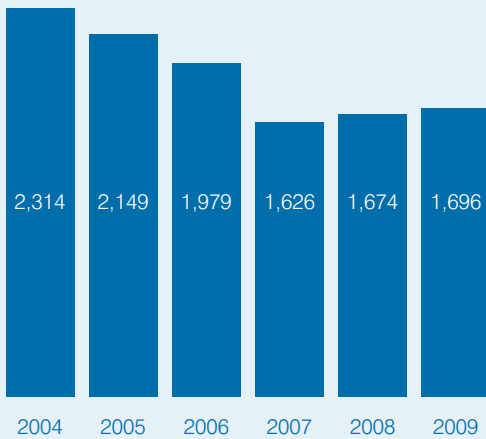
Rebated pharmaceuticals



Figures as at year-end 2009

Co-payments for pharmaceuticals

Co-payments in € m

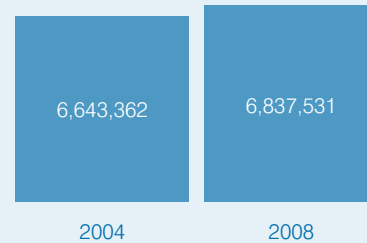


Charge per unit in €

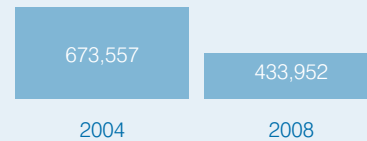


Co-pay exemptions

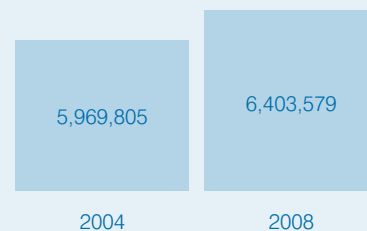
Number of patients who are exempt from the prescription charge (hardship cases in accordance with § 62 SGB V):



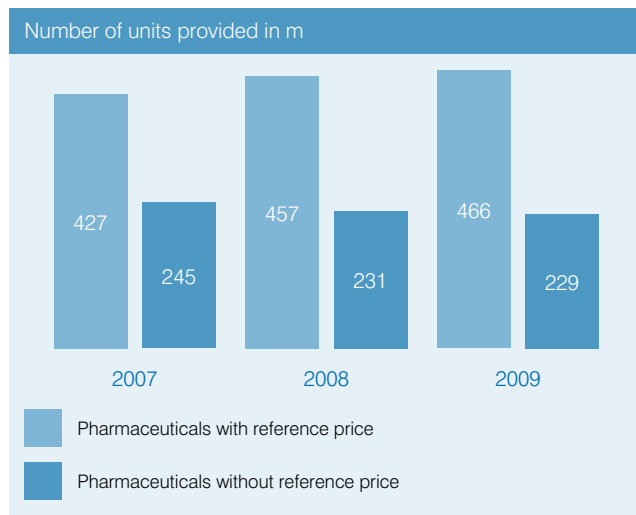
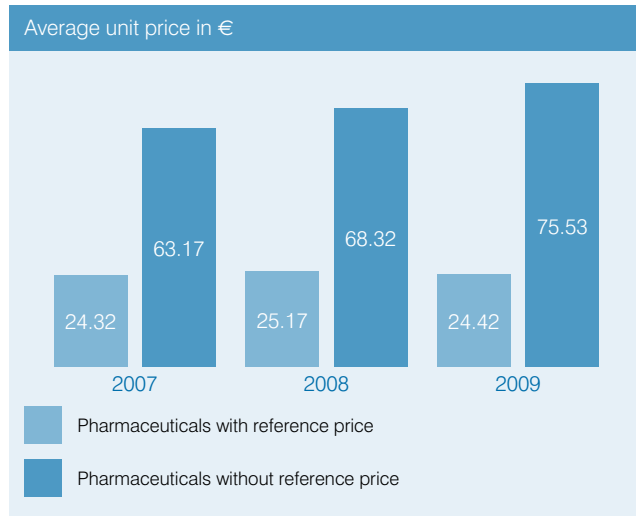
Number of patients who exceed the annual prescription charge limit of 2% of their gross annual income:



Number of patients who exceed the annual prescription charge limit of 1% of their gross annual income (chronically ill patients):



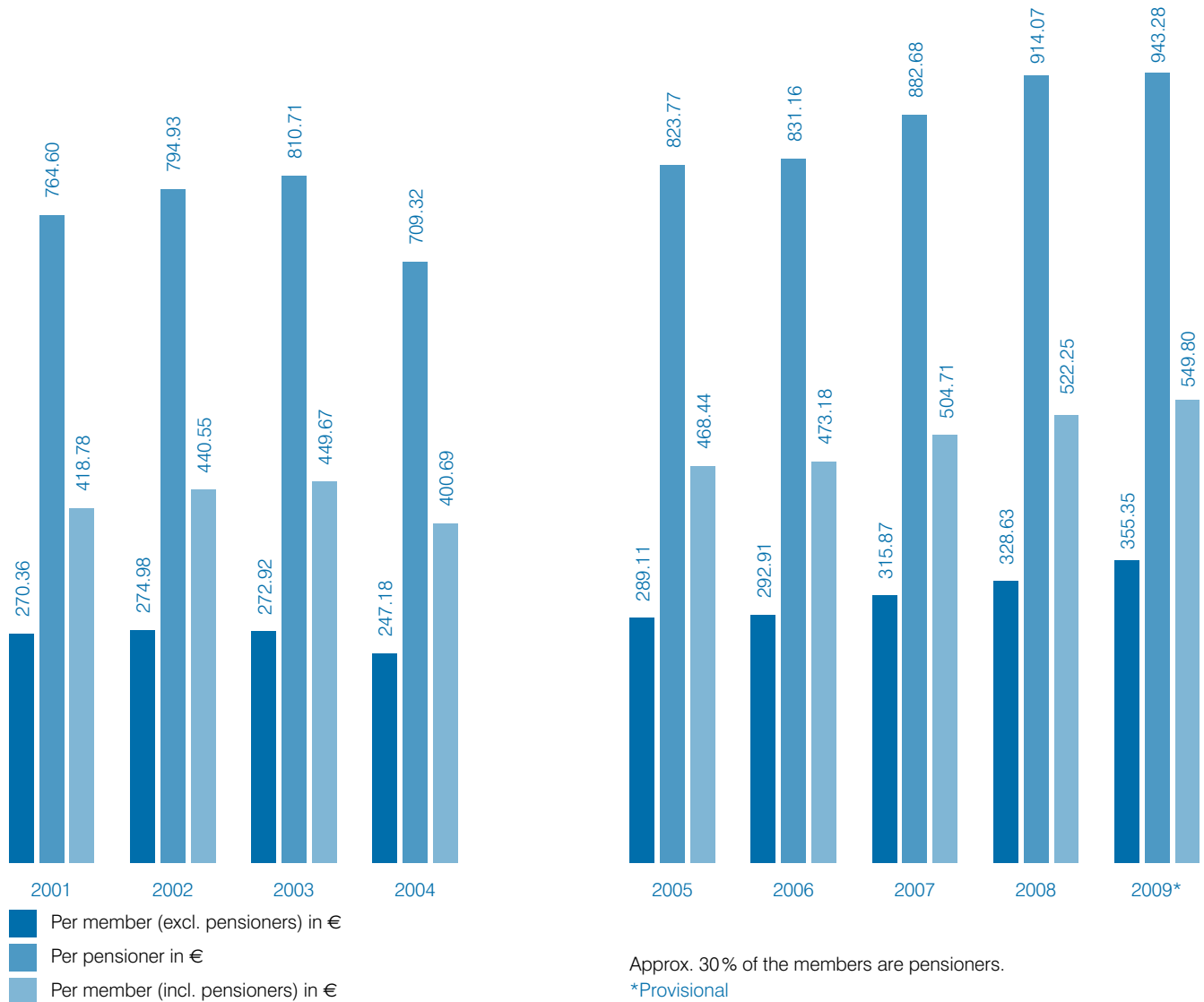
Pharmaceuticals with and without reference price



Prescribed pharmaceuticals (SHI)

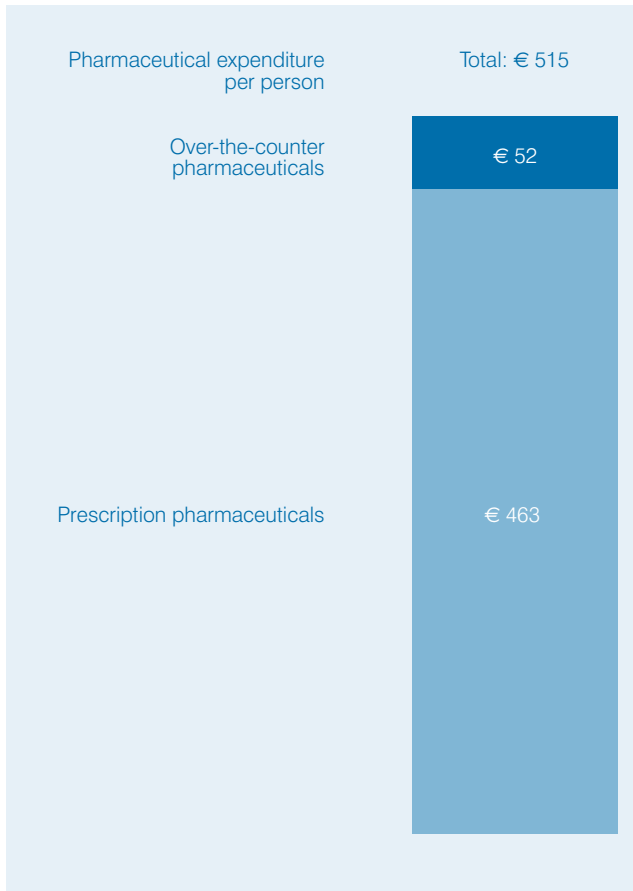
Year	Prescriptions per member	Pharmaceuticals per prescription	Prescribed pharmaceuticals per member
2000	11.00	x 1.55	17.00
2001	11.00	x 1.55	17.00
2002	10.50	x 1.49	15.65
2003	10.20	x 1.56	15.91
2004	8.44	x 1.70	14.35
2005	8.76	x 1.72	15.07
2006	8.53	x 1.74	14.84
2007	8.66	x 1.75	15.16
2008	8.81	x 1.76	15.51
2009	8.79	x 1.76	15.47

Pharmaceutical expenditure per SHI member

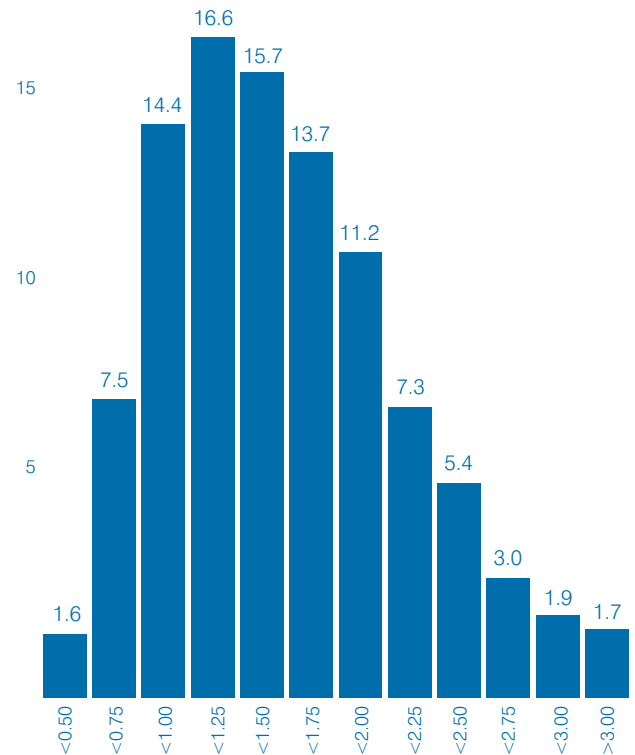


Pharmaceutical expenditure per person

Distribution of pharmacies according to turnover



Pharmacy share according to turnover (%)

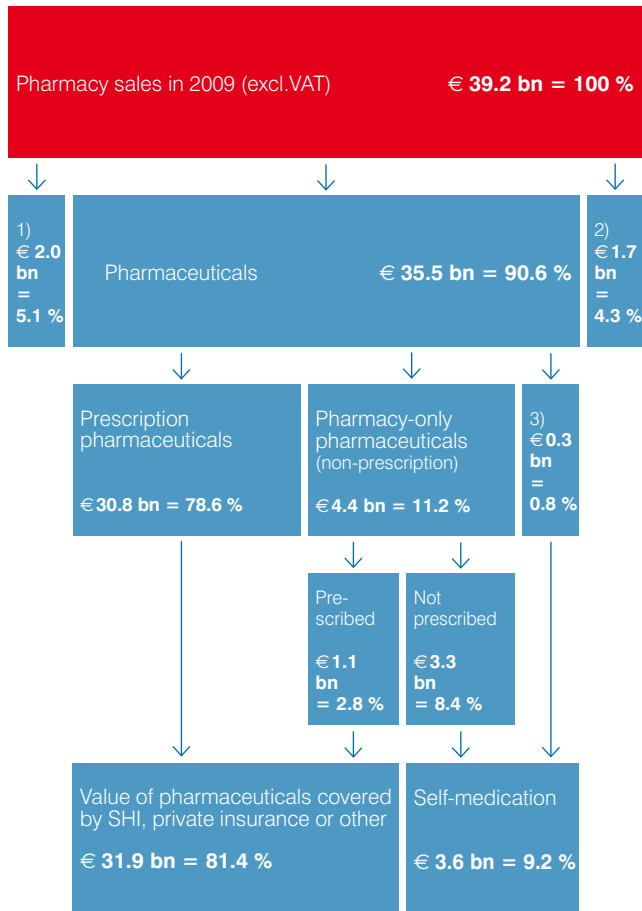


Incl. VAT

Turnover in € m (excl. VAT)

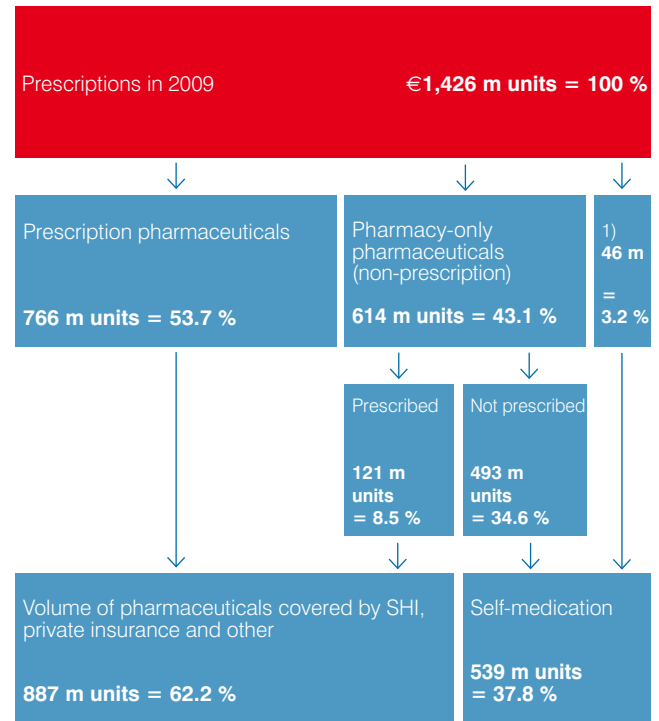
Structure of pharmacy sales

Measured in sales value:



- 1) Supplementary assortment
- 2) Patient care products
- 3) Unrestricted OTC pharmaceuticals*

Measured per units:

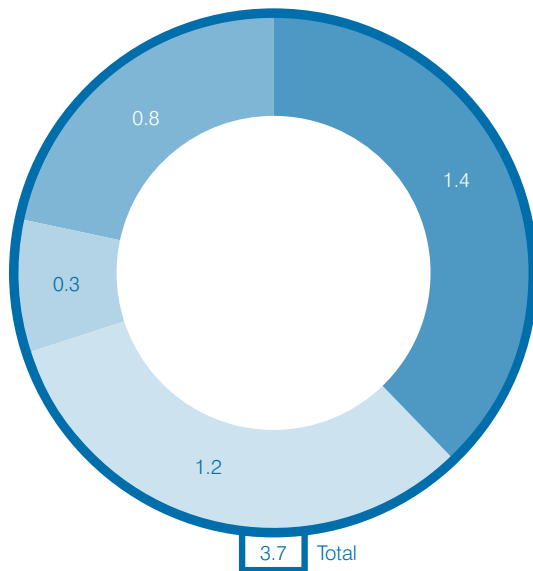


- 1) Unrestricted OTC pharmaceuticals*

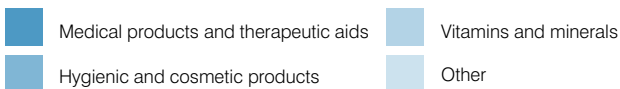
* Pharmaceuticals which may be sold outside pharmacies (e.g. by chemists)

Structure of complementary product range

Drug-related problems (DRP) concerning self-medication



Sales in € bn (excl. VAT)



* includes supplementary assortment and patient care products

Almost every 5th patient request for self-medication pharmaceuticals is associated with one or more drug-related problems (DRP).

72 % of DRP occur in conjunction with the four most common indications, i.e. pain, respiratory-, gastrointestinal- and skin disorders.

75 % of DRP are inappropriate self-medication, inappropriate product request, wrong dosage, and duration of drug use (including abuse) was too long.

If a patient has a medication record at the pharmacy, significantly more cases of wrong dosage and drug-drug interactions can be identified.

90 % of DRP can be resolved in pharmacies.

VAT on pharmaceuticals in the EU*

	Tax rate for pharmaceuticals	General VAT rate
Denmark	25.0	25.0
Bulgaria	20.0	20.0
Germany	19.0	19.0
Greece	10.0	21.0
Latvia	10.0	21.0
Italy	10.0	20.0
Austria	10.0	20.0
Slovakia	10.0	19.0
Estonia	9.0	20.0
Romania	9.0	19.0
Czech Republic	9.0	19.0
Slovenia	8.5	20.0
Finland	8.0	22.0
Poland	7.0	22.0
Belgium	6.0	21.0
Netherlands	6.0	19.0

		Tax rate for pharmaceuticals	General VAT rate
Hungary		5.0	25.0
Lithuania		5.0	21.0
Portugal		5.0	20.0
Spain		4.0	16.0
Luxembourg		3.0	15.0
France	Refundable pharmaceuticals	2.1	19.6
	Non-refundable pharmaceuticals	5.5	
Sweden	Prescription pharmaceuticals	0.0	25.0
	Over-the-counter pharmaceuticals	25.0	
Ireland	Oral medication	0.0	21.5
	Non-oral medication	21.5	
UK	National Health Service pharmaceuticals	0.0	15.0
	Over-the-counter pharmaceuticals	15.0	
Malta		0.0	18.0
Cyprus		0.0	15.0

* Tax rates as at 2010