

# German Pharmacies

Figures Data Facts  
2010



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## **Pharmacies in the health care system**

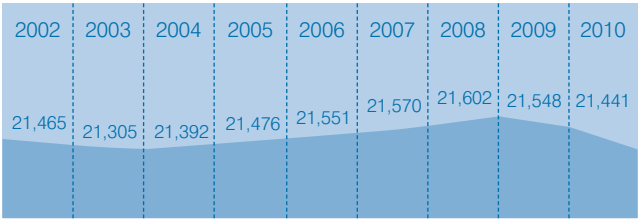
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# Community pharmacies

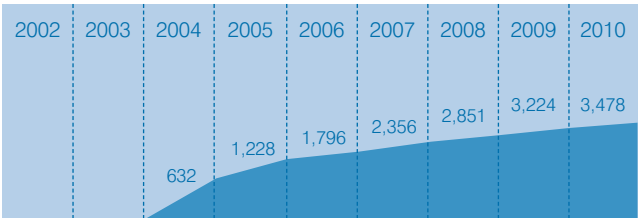


# Numbers of pharmacies

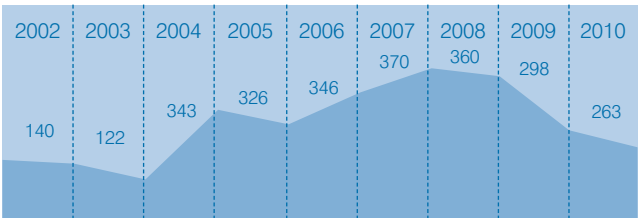
Number of pharmacies (incl. subsidiaries)



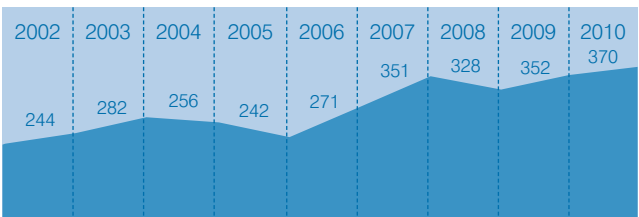
Subsidiaries



Pharmacies opened



Pharmacies closed



Figures as at year-end

# Pharmacies in the German states

German state	Public pharmacies in 2010	Independent pharmacies*	Subsidiaries
Baden-Württemberg	2,746	2,322	424
Bavaria	3,430	2,868	562
Berlin	884	726	158
Brandenburg	580	464	116
Bremen	174	145	29
Hamburg	453	381	72
Hesse	1,614	1,370	244
Mecklenburg-West Pomerania	411	347	64
Lower Saxony	2,086	1,742	344
North Rhine	2,480	2,096	384
Westphalia-Lippe	2,203	1,822	381
Rhineland-Palatinate	1,119	970	149
Saarland	335	299	36
Saxony	999	810	189
Saxony-Anhalt	617	509	108
Schleswig-Holstein	727	623	104
Thuringia	583	469	114
<b>Total</b>	<b>21,441</b>	<b>17,963</b>	<b>3,478</b>

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

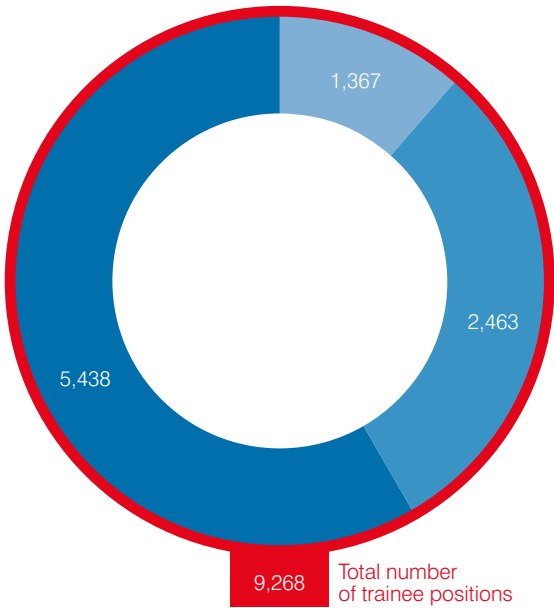
Year-end	2002	2003	2004	2005	2006	2007	2008	2009	2010
Pharmacists	46,513	46,140	46,014	46,276	46,953	47,766	48,030	48,002	48,695
Of which female (%)	63.6	62.9	65.5	64.8	66.0	66.6	68.5	69.2	68.7
Pre-registration trainee pharmacists	1,520	1,387	1,431	1,534	1,518	1,506	1,327	1,287	1,367
Pharmaceutical engineers	10,218	9,600	9,602	9,266	8,292	8,413	8,196	8,056	7,701
Pharmaceutical technical assistants (PTA)	41,495	42,385	43,946	46,431	48,656	49,874	51,907	53,734	55,345
Pharmaceutical commercial employees (PCE) / other	40,091	37,636	35,812	36,454	38,355	36,026	36,020	35,769	34,719
<b>Total jobs</b>	<b>139,837</b>	<b>137,148</b>	<b>136,805</b>	<b>139,961</b>	<b>143,774</b>	<b>143,585</b>	<b>145,480</b>	<b>146,848</b>	<b>147,827</b>




# Pharmacists and pharmacy students

Pharmacists			
Pharmacists in:	2009	2010	Percentage of women
Community pharmacies	48,002	48,695	68.7
Of which managers	18,324	17,963	45.6
Hospital pharmacies	1,890	1,909	62.2
Industry, administration, organisation, science	7,940	8,328	57.6
<b>Total employed pharmacists</b>	<b>57,832</b>	<b>58,932</b>	<b>66.9</b>

Pharmacy students	
2005/2006	12,069
2006/2007	12,128
2007/2008	11,721
2008/2009	12,052
2009/2010	12,485

# Pharmacy trainee positions



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

# Pharmacy services

Approximately 4 million people visit public pharmacies every day.

## In 2010, pharmacies

- reported a total of 8,300 suspected cases of medication risks to the Drug Commission of the German Medical Association. Main complaints referred to unwanted medication effects and reports of misuse (31 %), errors in packaging (30 %) as well as galenic deficiency (18 %).
- processed some 16 million prescriptions covered by the statutory health insurance (SHI).

## Training courses

In 2010, approximately 121,000 people took part in nearly 2,600 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<sup>1</sup>

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

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

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

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

## Sources (representative surveys)

<sup>1</sup> Reader's Digest 2010

<sup>2</sup> Allensbach 2008

<sup>3</sup> YouGovPsychonomics 2008

<sup>4</sup> infas 2008

<sup>5</sup> infas 2009

# Pharmacy density in Europe

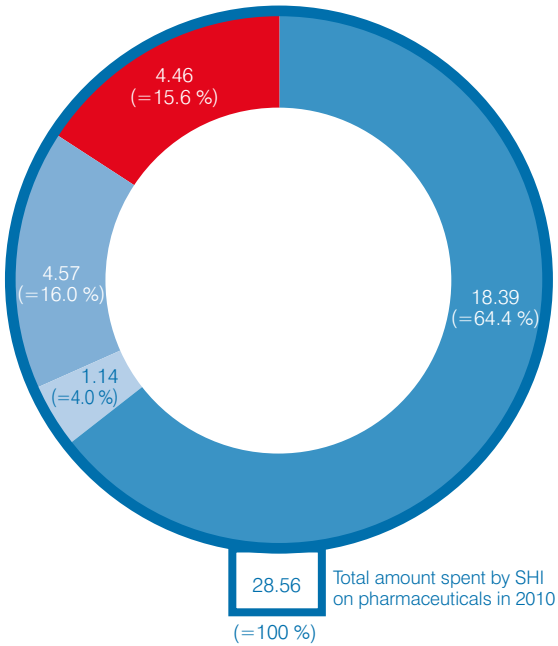
	People per pharmacy*
Denmark	17,200
Sweden	10,400
Netherlands	8,300
Slovenia	6,800
Austria	6,700
Finland	6,600
Luxembourg	5,300
United Kingdom	4,700
Czech Republic	4,400
Estonia	4,400
Romania	4,300
Hungary	4,200
<b>Germany</b>	<b>3,800</b>
Portugal	3,800
Poland	3,600
Italy	3,400
<b>EU-average</b>	<b>3,300</b>
Ireland	2,900
France	2,800
Slovakia	2,800
Latvia	2,600
Lithuania	2,200
Spain	2,200
Belgium	2,100
Malta	1,900
Cyprus	1,800
Bulgaria	1,700
Greece	1,200

\* Germany: ABDA-Statistik 2010; all other countries:  
last available year according to ZAEU, SFK, IPU, OAK

# Pharmacies in the health care system



# SHI expenditure on pharmaceuticals (excl. co-payments)



In € bn

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

\* Taking into account the statutory pharmacy rebate of € 1,75

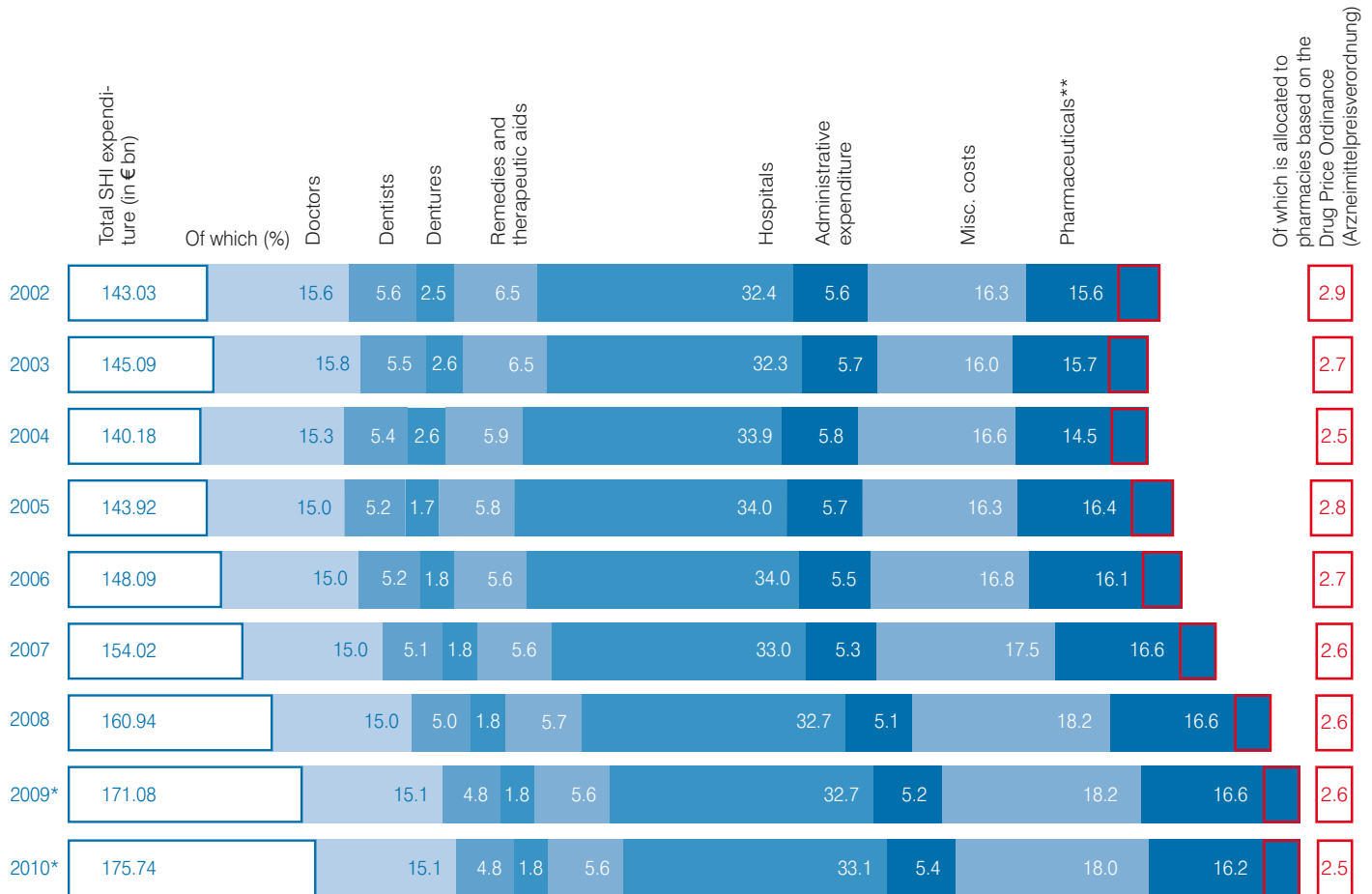
# Distribution of the value added

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

	2007	2008	2009*	2010*
Industry	64.00	64.50	64.40	64.40
Exchequer (VAT)	16.00	16.00	16.00	16.00
Pharmacies	15.90	15.50	15.70	15.60
Wholesalers	4.10	4.00	3.90	4.00

\* Taking into account the statutory pharmacy rebate of € 1,75

# Allocation of total SHI expenditure



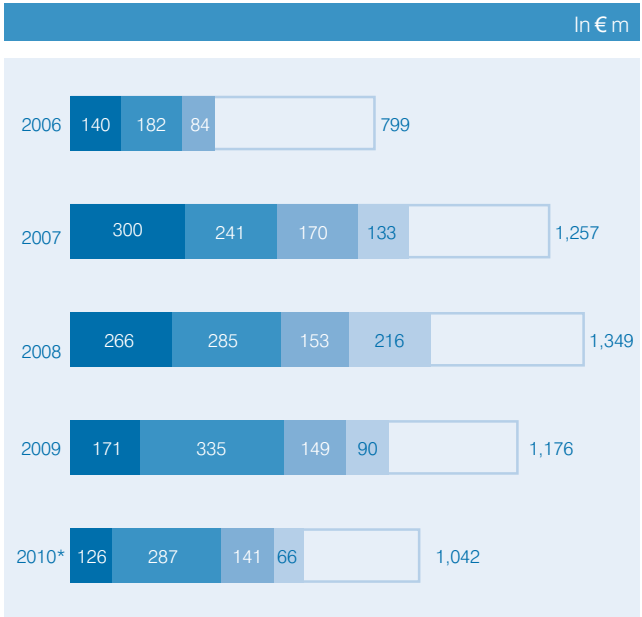
\* Provisionally, taking into account the statutory pharmacy rebate of € 1,75

\*\* From pharmacies

# Distribution of miscellaneous costs

	in %
Sick pay	4.4
Transportation expenses	2.1
Home care	1.8
Pregnancy, maternity	1.6
Pharmaceuticals from others	1.6
Ambulant & inpatient treatment, rehab	1.4
Dialysis in doctors' practices	1.1
Social services	0.9
Early diagnosis measures	0.8
Integrated care	0.7
Others	1.6
<b>Total</b>	<b>18.0</b>

# Vaccine sales

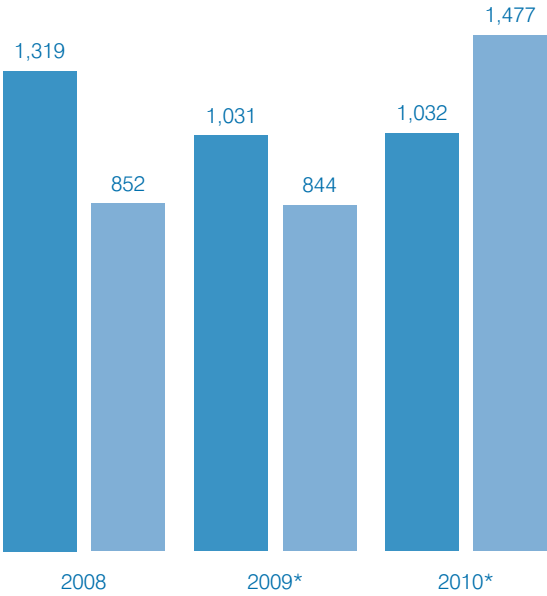


- Of which tick-borne meningoencephalitis
- Of which flu
- Of which pneumococcus
- Of which human papillomavirus (HPV)

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

\* Provisionally modified databasis, therefore limited comparability to previous years.

# Statutory pharmacy and manufacturer rebates

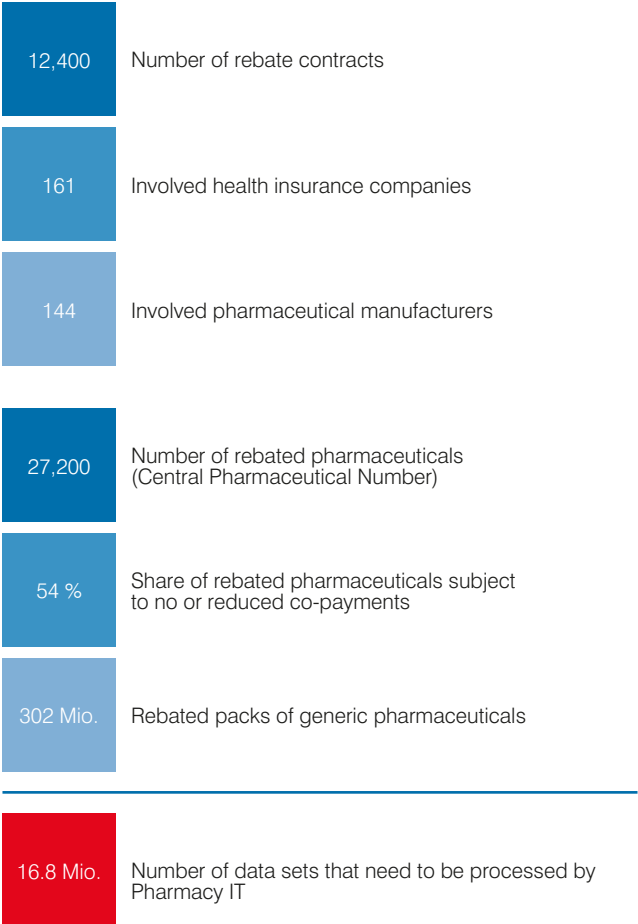


In € m

- Pharmacy rebate
- Manufacturer rebates (excl. rebate contracts)

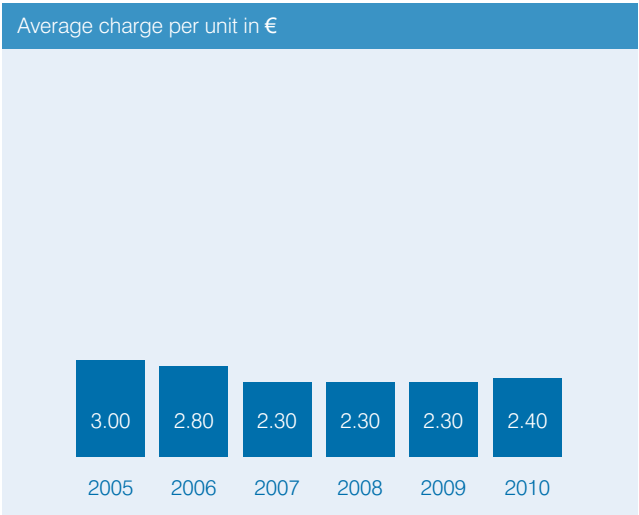
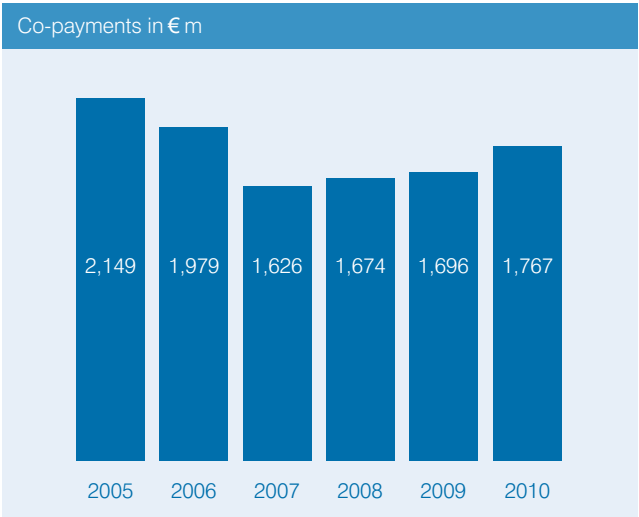
\* Provisionally, taking into account the statutory pharmacy rebate of € 1,75

# Rebated pharmaceuticals



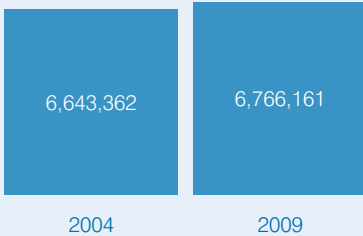
Figures as at year-end 2010

# Co-payments for pharmaceuticals

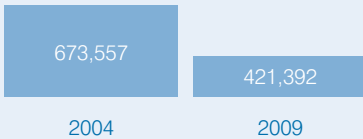


# Co-pay exemptions

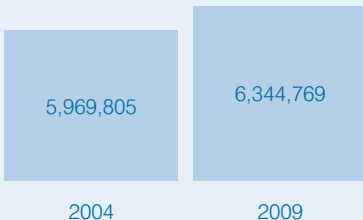
Number of patients who are exempt from the prescription charge (hardship cases in accordance with § 62 SGB V):



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



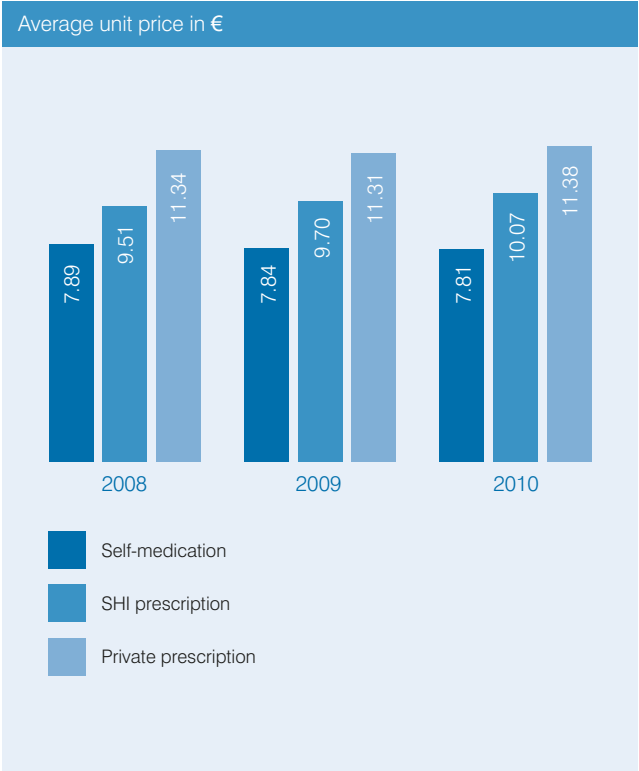
Number of patients who exceed the annual prescription charge limit of 1% of their gross annual income (chronically ill patients):



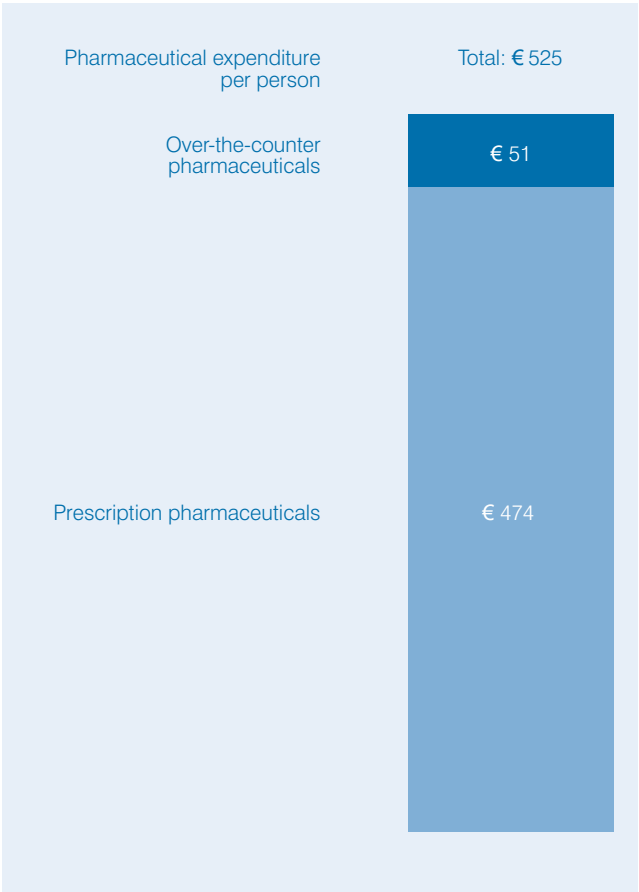
# Prescribed pharmaceuticals (SHI)

	Prescriptions per member		Pharmaceuticals per prescription	Prescribed pharmaceuticals per member
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
2010	8.84	x	1.72	15.20

# Trends in Over-the-counter pharmaceuticals



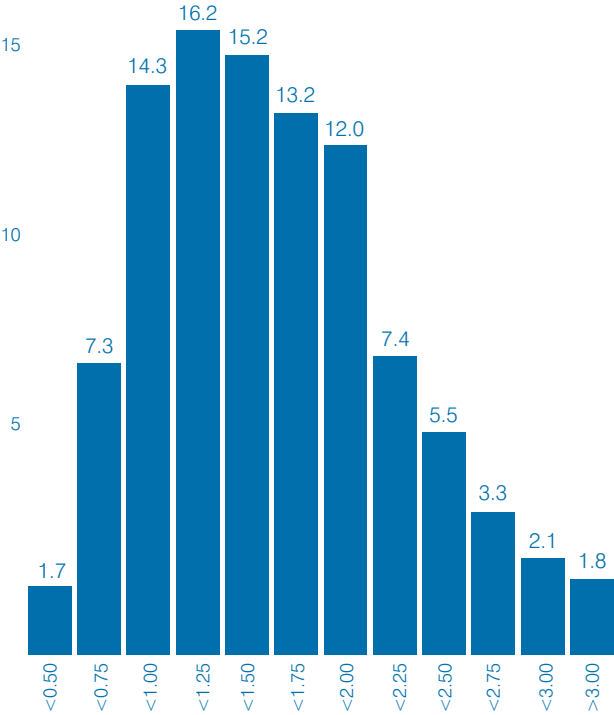
# Pharmaceutical expenditure per person



Incl. VAT

# Distribution of pharmacies according to turnover

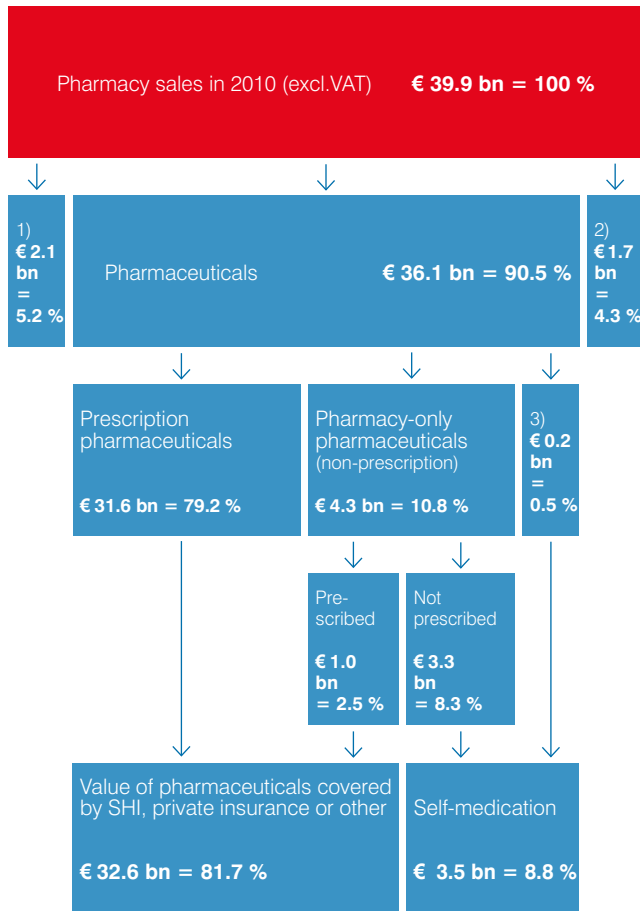
Pharmacy share according to turnover (%)



Turnover in € m (excl. VAT)

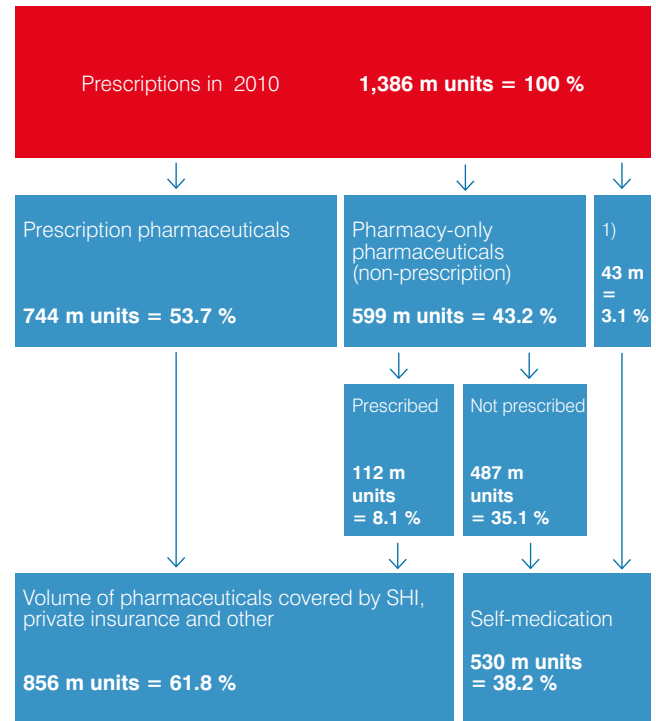
# Structure of pharmacy sales

Measured in sales value:



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

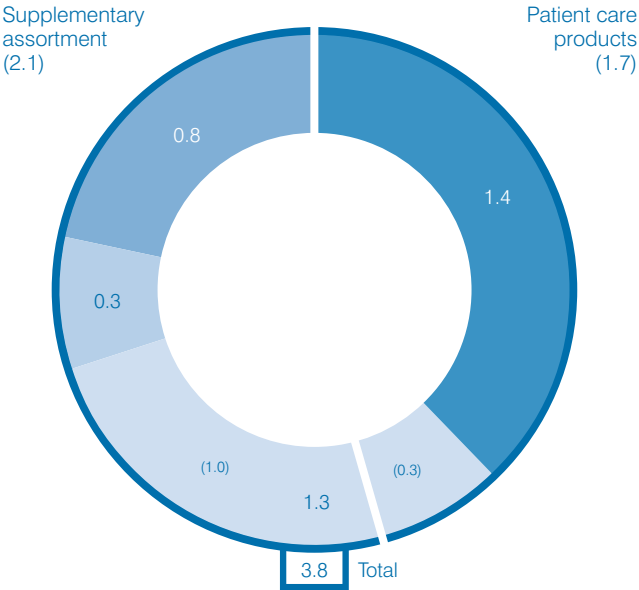
Measured per units:



- 1) Unrestricted OTC pharmaceuticals\*

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

# Structure of complementary product range



Sales in € bn (excl. VAT)

- Medical products and therapeutic aids
- Hygienic and cosmetic products
- Vitamins and minerals
- Other

# Drug-related problems (DRP) concerning self-medication

Findings of the study: Nature and frequency of drug-related problems in daily community pharmacy practice in Germany.

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

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

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

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

90 % of DRP could be resolved in pharmacies.

**Sources:** Eickhoff, Griese, Hämmerlein, Schulz: ABP in der Selbstmedikation. Chance und Auftrag für die Apotheke. Pharm, Ztg, 2009; 154(39): 3606-15

# VAT on pharmaceuticals in the EU\*

	Tax rate for pharmaceuticals	General VAT rate	
Denmark	25.0	25.0	
Bulgaria	20.0	20.0	
<b>Germany</b>	<b>19.0</b>	<b>19.0</b>	
Latvia	12.0	22.0	
Italy	10.0	20.0	
Austria	10.0	20.0	
Slovakia	10.0	20.0	
Czech Republic	10.0	20.0	
Romania	Prescription pharmaceuticals Over-the-counter pharmaceuticals	9.0 24.0	24.0
Finland	9.0	23.0	
Estonia	9.0	20.0	
Slovenia	8.5	20.0	
Poland	8.0	23.0	
Greece	6.5	23.0	
Portugal	6.0	23.0	
Belgium	6.0	21.0	

	Tax rate for pharmaceuticals	General VAT rate	
Netherlands	6.0	19.0	
Hungary	5.0	25.0	
Lithuania	Refundable pharmaceuticals Non-refundable pharmaceuticals	5.0 21.0	21.0
Cyprus	5.0	15.0	
Spain	4.0	18.0	
Luxembourg	3.0	15.0	
France	Refundable pharmaceuticals Non-refundable pharmaceuticals	2.1 5.5	19.6
Sweden	Prescription pharmaceuticals Over-the-counter pharmaceuticals	0.0 25.0	25.0
Ireland	Oral medication Non-oral medication	0.0 21.0	21.0
UK	National Health Service pharmaceuticals Over-the-counter pharmaceuticals	0.0 20.0	20.0
Malta	0.0	18.0	

\* Tax rates as at 2011

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# Notes