

01/2018

ALL-IN-ONE MAGAZINE

PHOENIX group

Growing fast

Biggest healthcare logistics warehouse in the Nordics

Broad Portfolio

All-in-One services in the UK

Market Experts

Unique service offering in the Balkan region

ALL IN **one**
a PHOENIX service



Dear reader,

A new year with new challenges has started. With All-in-One, we provide value-adding services along the entire value chain, from production to point of sale generating more revenue at multiple different stages.

Our key offerings are ready-to-use and tailor-made sales and marketing support in more than 14,000 pharmacies in 26 countries across Europe, insights on pharmacists, doctors and patients behaviour creating improved patient adherence and better decision making, decreased cost through expert warehousing and healthcare logistics, valuable support and comparator sourcing for clinical trials and customised specialty solutions like procurement consultancy.

Read more about our European and local services in this new edition of our quarterly All-in-One Magazine.

Looking forward to cooperating with you!

Kind regards

Stefan Jung

Head of Pharma Services



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Valuable real world data

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Title Page:

The Køge Healthcare Logistics Warehouse construction site near Copenhagen.

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PHOENIX 3RD QUARTER 17/18 FURTHER GROWTH



PHOENIX group continued to develop profitably in the first nine months of the fiscal year 2017/18 (February to October 2017). Compared to the same period of the previous year, the total operating performance significant for pharmaceutical wholesale **rose by 4.7 per cent to €23.4 billion**.

Adjusted for foreign exchange rate effects, the increase amounted to 5.1 per cent. Group revenue grew by 2.6 per cent (adjusted for foreign exchange rate effects: 3.0 per cent) to €18.5 billion. The healthcare provider recorded a rise in revenue in the Northern and Western European markets in particular.

In the first three quarters, the company increased its total **income by approx. 5.1 per cent** to over €1.9 billion. Earnings before interest, taxes, depreciation, and amortisation (EBITDA) grew clearly in the first nine months by €27.7 million to €322.3 million – an increase of 9.4 per cent. **Profit after tax also**

rose significantly by 27.9 per cent to €136.2 million (comparison period: €106.5 million). *“The first three quarters of the fiscal year 2017/18 underline the good market position of the PHOENIX group as a leading healthcare provider in Europe,”* summarised Oliver Windholz, Chief Executive Officer of PHOENIX group.

In October 2017, PHOENIX opened a new distribution and logistics centre in Gotha, Germany. The site covering more than 10,000 square metres supplies pharmacies in the region. In November 2017, PHOENIX announced the acquisition of the Serbian pharmacy chain **Goodwill Apoteka**. The transaction is subject to the approval of the Serbian competition authorities. As a result of the acquisition, over 300 Serbian pharmacies will operate under the PHOENIX group’s BENU brand. *“This substantially strengthens our leading position in the Serbian pharmacy market,”* continued Windholz.

Positive forecast for fiscal year 2017/18

For 2017/18 as a whole, the company aims to expand its market position in Europe. *“As a result of our organic growth and following targeted acquisitions, we expect the PHOENIX group to achieve a clear increase in revenue and result,”* explained CEO Oliver Windholz while presenting the quarterly figures.

AT A GLANCE

- First three quarters generate substantial increase in earnings
- New distribution and logistics centre opened in Germany
- Goodwill pharmacy chain acquired in Serbia

BUSINESS INTELLIGENCE

VALUABLE REAL WORLD DATA



Pharmacy Sell-Out Data

Ideally, realtime data used for marketing ROI analysis are actual data from the point of sales. PHOENIX can provide such data through its own pharmacy chains, collaboration pharmacies, through its customer loyalty card communities or through point-of-sales systems. Data from different countries and different sources are united in one central database and made available for analyses to a central team of analysts.

The success of a drug and its benefit to the patient or consumer is determined in the market. Why not use intelligence from the real world to prepare for the launch and to monitor and optimise its success?

Our real world universe includes 150,000,000 patient contacts each year visiting our 2,000 own pharmacies, one of our 12,500 cooperation partners or one of the 50,000 pharmacies which are supplied with products through the wholesale channel.

Business Intelligence

Based on discussions with our industry partners, PHOENIX identi-

fied the value which pharmaceutical manufacturers can gain from wholesale and retail data sets. Initial proof of concept confirmed that clients can benefit from data analyses and increase revenue, optimise their expenditures and improve patient treatments. The decision was taken to integrate wholesale and retail data from 26 European countries into one database with daily synchronisation. This real world and real time database is the foundation of the PHOENIX All-in-One BI solutions under one strong European brand. Pharmaceutical manufacturers can benefit from market intelligence in almost realtime.

Partnering for success

Beyond providing Business Intelligence solutions PHOENIX has more arrows in the quiver to provide success and take appropriate action. Our All-in-One services can be combined into closed-loop success based collaborations.

PHOENIX can provide business analytics, optimise and steer the supply chain, provide point-of-sales support closing the loop from pharmaceutical industry to patients and thus deliver success.



Strategy & Portfolio
Management



Commercial
Excellence



Operational
Excellence

Measuring marketing campaigns

- Assessment of the impact of TV campaigns on product sales
- Evaluation of the impact of a marketing mix of price reduction, extra on-shelf placement, instore promotions like magazines or TV
- Analysis of the spill-over effect from the promoted brand to other own or competitive brands

PHARMAVIE COOPERATION WITH BIOGARAN



Pascal Guerit, pharmacist and expert for nutrition therapy and consultant for PharmaVie informing members in Paris on 14th December 2017.

PharmaVie, the French PHOENIX Pharmacy Partnership Member, supports its members with nutrition seminars for cancer patients with our industry partner Biogaran.

In 2015, 385,000 new cases of cancer occurred in France – that is more than 15 affected patients per pharmacy. Taking care for cancer patients on a daily basis, the pharmacist and her/his team play an important role in the healthcare sector.

To support pharmacists in this important role, PharmaVie, the French PHOENIX Pharmacy Partnership member has joined forces with the French Generic Manufacturer Biogaran, part of Servier. The cancer nutrition program “Bien dans mon assiette avec le cancer” of the laboratory and the nutrient therapy expertise of PharmaVie help cancer patients optimise their nutrition.

From October to December 2017, PharmaVie and Biogaran organi-

sed six „Cancer & Nutrition” meetings and brought together 200 participants from the PharmaVie network (pharmacy owners, pharmacists and their team members). The objective: To present the program „Bien dans mon assiette avec le cancer”, to underline the critical role of pharmacists and their teams, to inform them about the complexity of nutrition-related issues of cancer patients, and to point out key elements to support

them in the best possible way. Based on the big success of the six meetings, additional meetings of the initiative are planned to be scheduled this year.

This cooperation of our industry partner Biogaran with the French PHOENIX Pharmacy Cooperation Program PharmaVie is a perfect example of the value of a joint approach to patients.

“Our members are healthcare experts. We want to offer them all they need to advice, to support and to take care of their patients. These meetings bring the complementarity of Nutritional therapy white labels’ PharmaVie and Biogaran’s program to make our members experts of cancer patients.”

Laurence Dubois, Business Development and Partnership Director at PharmaVie

BROAD PORTFOLIO

ALL-IN-ONE IN THE UK



PHOENIX All-in-One offers you all necessary tools to grow your business – in Europe and locally. PHOENIX UK has started an own local „All-in-One package“.

The aim of All-in-One in the UK is to provide a clear understanding of what we can offer to you, our industry partners.

High Quality solutions that meet your needs

Whatever your supply chain and patient engagement needs are, PHOENIX UK has a high-quality solution. Through our All-in-One approach we work in partnership with manufacturers to develop the bespoke package of added-value services they need to meet their particular business goals.

Introducing UK All-in-One

„All-in-One“ underpins our vision to 'be the best integrated healthcare provider' for our partners. We are the market's 'go to' organisation for value added services.

At PHOENIX UK our 'All in One' proposition consists of **core service**

areas. Our philosophy is to provide **sustainable partnership growth** based on delivering outstanding performances across our group companies.

The UK key focus areas are:

- Business Intelligence
- European Commercial Partnerships (PECP)
- Hospital, Speciality and Niche markets
- Innovative Supply Chain Solutions
- Patient Services
- Sales and Commercial Support
- Supply Chain Optimisation

Integral to All-in-One in UK is our specialist **Business Intelligence (BI)** offering. In close collaboration with our European partners, we harness the data available via our wholesale and retail businesses.

At PHOENIX UK, we are able to leverage analytics and realtime data analysis to stay ahead of customer demand. It provides a clear picture into supply chain inventory, pharmacy sell-in/sell-out, and advanced longitudinal patient data. All Business Intelligence activities

are tailored to individual manufacturer requirements and designed to provide insight that will support brand strategy and understanding of product usage across the PHOENIX network.

PHOENIX UK is committed to working with our manufacturer partners to identify any additional reporting or intelligence needs and identifying the most appropriate mechanism for delivering transactional, operational and added value insight data.

More Information:

www.allinone.phoenixmedical.co.uk

PHOENIX UK

- Large and successful group of companies ensuring patients and the public have access to high-quality healthcare in the UK
- 13 Wholesale distribution centres (PHOENIX Distribution)
- 520 own Rowlands pharmacies
- 3,500+ partner pharmacies (Numark)
- Largest supplier of medicine to General Practice in UK (PSUK)
- Specialist DAC proposition (NuCare)
- £1.4 Billion turnover

BIGGEST HEALTHCARE LOGISTICS WAREHOUSE IN THE NORDICS



The construction of Nomeco's new warehouse in the Copenhagen area is moving fast forward. The building of the new Nordic hub for Healthcare Logistics is almost ready, and all the technical installations are in place with full attention to validation and tests.

The ambition is to take the new site to a completely new level within Healthcare Logistics when it comes to **efficiency, quality and security**. "We are setting a new standard. This is not just about the highest possible quality. It is also about fast market access which is essential to the industry. Therefore, our new warehouse is built to support our clients with the shortest possible lead time. It is guaranteed by automation and smart support functions enabling proactivity in the inbound and outbound processes. All processes are leaned, and efficiency is so to speak the DNA of the whole warehouse," Jesper Lotz, Commercial Director of Nomeco HealthCare Logistics, explains.

The new "ONE" warehouse in Køge, the site located 35 kilometres

south of Copenhagen, will be ready this summer: All the goods from the present three Healthcare Logistics warehouses will be moved to their new location.

"Our ramp-up plan is ready, and we will move the goods gradually during 2018. We have informed all our clients about the plan, and we can guarantee them a minimum of inconvenience in the period of stock transfer – both for them and for their customers. We have learned a lot from previous stock transfer processes and we know that the 'Devil is in the detail'," Jesper Lotz explains.

Among other things, transparency and a close dialogue are key elements to a successful transfer. "We are confident that we are able to do this 'after the book'. Bear in mind that we have 30 years of experience in running Healthcare Logistics warehouses. On top of that we have built state of the art when it comes to quality, so we are in every way ready to meet future wishes and requirements."

THE NEW KØGE WAREHOUSE

The fully automated warehouse is built for the Nordic countries and the Baltics, and Køge is the most optimal gateway to the region. The new warehouse is the largest single building investment in PHOENIX group's history.

The 30 meters tall high-bay has both ambient and cool areas. It is operated by 16 automatic cranes and has space for well more than 60,000 pallets. The building is even prepared for future capacity expansion.



FI HEALTH AWARDS & FORESIGHT FORUM

The Finnish Health Awards, organised by Tamro Corporation, part of PHOENIX group, is a recognised award for the stars and doers of the Finnish health industry. This year's event with all players of the Finnish healthcare sector met on 25th January 2018 in Helsinki

The „Foresight Forum“ brought together the contributors, decision makers, achievements, innovators and the „rising stars“ of the healthcare market. They discussed the

future visions of the industry in a high-profile presentations and a panel discussion.

The judges voted the **Finnish Brain Association's blood pressure campaign** as the Health Act of the Year. **Nightingale Health's blood analysis** for the prevention of cardiovascular diseases was selected as the Health Innovation of the Year.

The Health Awards rewards work that has effectively promoted the health of Finns, as well as brings promising innovations to the spotlight. Both winners received a prize of 5,000 Euro.

creasing awareness of the connection between brain health and elevated blood pressure was a noteworthy insight. Self-monitoring is part of future healthcare, and making it more widely adopted among citizens is essential in the prevention of serious health issues."

The jury was impressed by Nightingale Health's blood analysis due to its personalised and preventive approach.

The jury selected the winners from over 50 proposals. The proposals were assessed by a diverse group of healthcare professionals.

The winners 2018



The jury described their choice to reward the Finnish Brain Association's blood pressure campaign with the following words: "In-

Health Awards & Foresight Forum is carried out in co-operation with different actors in the healthcare and wellbeing industry. The main organiser, Tamro Corporation, has worked already over 120 years for the Finnish health and wellbeing.

HEALTHY BUSINESS BRUNCH



Leon Jankelevitch, MD Tamro Baltics (right), opens the event in Tallinn on 22nd November 2017.



Thought leader in the market:
The annual Tamro Baltics Healthy Business Brunches in the three Baltic countries.

The annual brunches brought together experts from Tamro Baltics, part of PHOENIX group, with our industry partners in late autumn and during the early winter period in Riga, Tallinn and Vilnius. This year's Healthy Business Brunches focused on the future and its challenges and possibilities for the healthcare sector. The aim of the

events was to provide our partners an insight on the most important developments and trends in pharmaceutical wholesale and retail sectors as well as to express the gratitude for the long term cooperation.

This time guest speakers drew the participants' attention to the innovative future. One of the presenters, Kaidi Reedi, Research and Analysis Manager at media agency Initiative, introduced the high technology glasses that follow the eye

glimpse. The research was based on a test in October 2017 in a BENU Pharmacy.

In Lithuania, Dalius Dulevicius, Managing Director PHD Lithuania, shared the prospects of Pharma up to 2050 with the participants. Predictive marketing, personalisation, data prediction, virtual doctors and DNA sequencing were just some of the topics he was covering.

The feedback from the participants was very positive, they rated the event very useful and interesting.

PROVEN HIGH QUALITY ISO9001:2015 CERTIFICATION COMPLETED

On 12th December 2017, after a one-year process, Tamro Baltics, the PHOENIX group company in the Baltic countries, has successfully passed the ISO 9001:2015 certification in all three markets.

The first of the three sites (Tamro in **Lithuania**) was already certified last year – in December 2016. The system was then rolled out to Tamro Latvia and Tamro Estonia to ensure highest quality standards for our industry partners. In **Estonia**, the certification audit was conducted on 7th December 2017, Latvia

followed on 11th December 2017, both with positive audit feedback: The

auditor admitted that the system was well organised, management demonstrated great support, and the employees at Tamro Baltics were open, collaborative and demonstrated a high competence level during the audit. Tamro Lithuania has already passed the first surveillance audit – a strong proof of consistency.



PHOENIX IN THE BALKAN REGION FROM ACCESS TO SUCCESS



We have the expertise in registration of medicines, medical devices and food supplements including:

- Product registration
- MA maintenance
- Pharmacovigilance
- Reporting
- Expert technical support

Developing your business is our business - with PHOENIX All-in-One in the Balkan region.

PHOENIX in the Balkans is operating under one regional management in Serbia, Bosnia & Herzegovina, Macedonia, Montenegro, Kosovo and Albania.

Your local expert in the Balkan region

Together with PHOENIX Croatia, PHOENIX Bulgaria and our partner in Slovenia, we are offering a single point of contact for the region. The companies that belong to our Balkan family have a strong and established presence in each local market, allowing you to benefit from their extensive experience and market-specific insights. Single point of contact and our network make it possible for you, our industry partners, to secure fast, simple, and standardized access to the markets in our Region.

In addition, a third of all sales

We are experienced in:

- Marketing plan development and execution
- New product development and launch
- Brand and product management
- Pricing
- ATL and BTL activates
- Event management
- PR
- Market analysis

in the region is channeled through PHOENIX as a wholesaler, and we are present in retail with own **BENU** pharmacies in Serbia and Montenegro and partnership pharmacies **BETTY** in **Serbia, Bosnia & Herzegovina and Macedonia**.

With PHOENIX in the Balkans, you have full access to all relevant tar-

get groups in the entire region: **pharmacies, hospitals and end consumers**. Insights on pharmacists, doctors and patients behavior gathered through hundreds and hundreds of daily contacts enable us to tailor market specific marketing mix for each individual product. When **launching new products** or considering to **outsource established products**, our in-depth market knowledge, ready-to-use and tailor-made sales and marketing solutions can be a solution for you. Business transparency, paired with full control of receivables and focus on the level of individual products, make our fully fledged organisations in each market capable of providing regional and local solutions in accordance with the highest corporate standards. Our partners can testify this.

Did you know?

- Our sales force made more than 190,000 visits to pharmacists and physicians across the Region in 2017.
- We are maintaining more than 2,000 MAs in the region.
- We have 214 active contracts with different industry partners for marketing, field force and/or regulatory services in the region.



AWARENESS CAMPAIGN HEART FAILURE

German Pharmacies participate in nationwide campaign




The competition is getting stronger for pharmacies across Europe. Showing competence and giving advice to patients is the key for pharmacies to differentiate from other distribution channels and other pharmacies. You, our industry partners, can benefit in joining our Patient Services awareness campaigns.

In cooperation with an industry partner, PHOENIX has created a German-wide campaign raising awareness of heart failure: „Herzessache! –Schützen Sie Ihr Herz! (Your heart matters – protect it!).

discover problems before they lead to serious illness, pharmacies can strengthen their role as health competence centres, PHOENIX gains recognition and strengthens customer loyalty, and you can raise awareness for this disease – and the related products.

Discuss with us how we can help you raise awareness at patient level with our Patient Services. More information on our homepage www.phoenix-all-in-one.eu.



Win-Win-Win-Win situation for pharmacies, patients, PHOENIX and our industry partner

Two million Germans suffer heart failure each year. The knowledge level about that topic is low. A first step is to become aware of the risk, observe the symptoms and to visit a doctor in a timely manner.

PHOENIX Germany invited approximately 10,000 pharmacy customers to join the campaign that was launched in October with marketing material including a checklist that provides information about the symptoms and gives advice when to consult a doctor. With this awareness campaign, we are creating a win-win-win-win situation: Patients win because pharmacists might

More information: a.maier@phoenixgroup.eu



PHOENIX CROATIA

PHOENIX manufacturer event in Zagreb

To show our manufacturer partners that we are more than just box movers and offer a variety of value-adding services that help them grow their revenues, PHOENIX Croatia invited manufacturers to an informative lunch event at the Westin Hotel in Zagreb.

Managing Director Josip Matusinovic welcomed more than 70 guests from more than 30 manufacturers on 15th November 2017. Olaf Christiansen, Head of Marketing Pharma Services Europe, gave a short PHOENIX group company overview showing our coverage and local expertise in Europe that enables us to offer value-added services to our industry partners: PHOENIX All-in-One.

Digitalisation is becoming more and more important

Hrvoje Barlovic from the Croatian Marketing, who organised the entire event, showed the guests the multichannel approach - including webinars for doctors in the future.

Vesna Babic, Brand Manager of our Croatian PHOENIX Pharmacy Cooperation program Adiva, finally presented news regarding the successful cooperation and the new digitalisation strategy.

The overall feedback was very positive.



NEW BRNO WAREHOUSE

High-Tech Healthcare Logistics warehouse

PHOENIX Czech Republic is the long-standing leader in the pharmaceutical distribution market in the Czech Republic. During 25 years of its existence, PHOENIX has established a strong base of six distribution centers for the storage and full-area distribution of pharmaceuticals.

Brno Warehouse – 3PL services in the heart of eastern Europe

The new warehouse in Brno offers 10,500 square metres (plus 3,500 sqm extension potential). Additional 350 sqm of mezzanine space (suitable e.g. for high value goods) are also available.

The warehouse has a capacity of 19,000 pallet spaces in ambient, 560 pallet spaces in cold chain (potential to double space if needed) and 1,000 pallet spaces for narcotics.

The Brno High-Tech Healthcare Logistics warehouse will meet all your expectations:

- Fully GDP compliant operations in all temperature zones
- GMP licensed
- Highest quality and security standards
- Ideal starting point for CEE distribution (CZ, SK, HU, HR, SK, PL, A)



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our monthly newsletter

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