

04/2019

ALL-IN-ONE MAGAZINE

PHOENIX group

Nomeco
PHOENIX group

GRAND OPENING

Biggest and highly automated
pharma warehouse in Køge

SETTING SAIL

PHOENIX Pharmacy Partnership
European Conference 2019

DISCUSSING THE FUTURE

HEALTHCARE FORUM CEE
in Vienna

ALL IN **one**
a PHOENIX service



Dear reader,

With more than 150 pharmaceutical warehouses and a strong pharmacy channel including 2,500 own pharmacies and more than 13,500 cooperation pharmacies, we are active in 27 countries. Based on this unparalleled coverage in Europe, we can offer you the right services to help you increase your revenue.

PHOENIX group is driving innovations in many different areas. Our new pharmaceutical and healthcare warehouse in Køge near Copenhagen is not only the biggest, but also the most automated warehouse in the Nordics. In UK, our central filling facility MediPac assembles up to 60,000 repeat prescriptions a day, and in Latvia, we offer the first digital loyalty card to our BENU pharmacy chain customers.

Talk to us and we will prove to you that together we can make a difference.

We look forward to a close and successful cooperation with you!

Kind regards

Stefan Jung & Stefan Pflug
Commercial & Operational Heads of
Corporate Pharma Services & Sourcing

IMPRINT

The All-in-One Magazine is published by PHOENIX Pharmahandel GmbH & Co KG, Corporate Pharma Services & Sourcing, Pfingstweidstraße 10-12, 68199 Mannheim, Germany.

All rights reserved, no part of this publication may be reproduced without prior permission by the publisher.

Editorial Team:

Chief Editor, Olaf Christiansen (o.christiansen@phoenixgroup.eu), Editorial Team: Julia Haßfeld (central editor), Tina Alstrøm, Maria Cederfont, Teodora Chulova, Walter Fortunat, Agnija Greiziņa, Adam James, Maja Jurcevic, James Lindsay, Sabine Mayer-Schmit, Mari Savolainen

Title Page:

The new Køge pharma warehouse near Copenhagen, Denmark.

Printed by:

Konica Minolta Marketing Service, Köln



EUROPE

- 3 PHOENIX group improves its profits
- 4 Pharmacists from all over Europe: PHOENIX Pharmacy Partnership Conference 2019
- 5 Discussing the future of healthcare: Healthcare Forum CEE in Vienna

COUNTRIES

- 6 Denmark: Opening of biggest pharma warehouse in the Nordics in Køge near Copenhagen
- 7 UK: New MediPac central filling facility
- 8 Bulgaria: Cooperation Program BETTY congress
- 9 Finland: Serving patients better in Olo pharmacies
- 10 Sweden: Future-oriented Tamro Insight Day
- 11 Latvia: Digital loyalty card in BENU pharmacies

ALL-IN-ONE NEWSFLASH

- 12 Austria: "Knowledge Days" for pharmacy teams, Croatia: Cooperation program ADIVA convention

PHOENIX GROUP IMPROVES ITS PROFITS



Mannheim, 24 September 2019 – The further expansion of the business has brought more revenue and profit for PHOENIX group in the first half-year 2019/20 (February to July 2019).

The healthcare provider which is active in 27 countries all over Europe achieved a revenue increase of 6.1 per cent (31 July 2019) to €13.3 billion. This growth is in particular based on the Eastern Europe region and the acquisition of the Romanian pharmaceutical wholesaler Farmexim and the nationwide pharmacy chain Help Net in July 2018. EBITDA (earnings before interest, taxes, depreciation, and amortisation) grew by 7.3 per cent to €224.6 million. Profit after taxes rose by 16.7 per cent in the first half-year to €96.6 million. Total operating performance, a particularly relevant figure for pharmaceutical wholesale, also increased by 5.3 per cent to €16.9 billion. This key figure comprises revenue and handling for service charge.

For the full fiscal year 2019/20 (31 January 2020), PHOENIX group expects to further improve its position in the European markets thanks to organic growth and targeted acquisitions. The company anticipates reve-

nue above the growth level of the European pharmaceutical markets, with increases in almost all markets in which the company is active. In terms of EBITDA, PHOENIX group expects an exceedance of the 2019/20 level compared to that of the previous year 2018/19.

In July 2019, PHOENIX group signed an agreement with Thio Pharma Pharmacies to acquire 20 pharmacies in the Netherlands. The company already operates more than 300 of its own BENU pharmacies in the country. The approval of the relevant antitrust authorities for the purchase of the Thio pharmacy chain with about 300 employees is pending. With the acquisition of Thio Pharma Pharmacies, PHOENIX group is strengthening its position as the best integrated healthcare provider in the Netherlands and across Europe.



Find more information
in the Press Release

PHOENIX PHARMACY PARTNERSHIP CONFERENCE



"With a closer cooperation between pharmacies, the pharmaceutical industry, and healthcare providers, we can create greater value for patient care than any one of us alone," said Frank Große-Natrop, Executive Board Member PHOENIX group at the opening of the second PHOENIX Pharmacy Partnership conference. The network of cooperation programmes with more than 10,500 independent pharmacies located in 16 countries is the largest of its kind in Europe. The three-day conference in Amsterdam, attended by more than 300 participants, focused on concrete solutions for the healthcare and pharmacy market which is undergoing major changes as a result of new competitors and advancing digitalisation.

"The strength of the community pharmacy is that in times of e-commerce it is offering customers the best of the offline and online world," said Große-Natrop. PHOENIX will support pharmacists on their way into the future with an Omni-Channel solution, for example an online platform. The pharmacy will remain the hub for healthcare: easily accessible, locally well connected, and a health

expert. *"This makes it the main player in a community's healthcare sector,"* continues Große-Natrop. So the focus needs to expand from drug dispensing to healthcare services. In some countries, pharmacies are already responsible for the pharmaceutical monitoring of medication adherence, and offer tests for the detection of diabetes and vaccinations. A core task of the pharmaceutical industry is to ensure efficient access to medicines. The quality of care could further be improved by innovations, for example in the area of biosimilars.

An optimistic atmosphere was noticeable at the conference: Participants stressed the need for change and find ways to exploit new technologies and innovative therapeutic options. This could only be solved jointly and through active exchange within the cooperation programmes.

We would like to thank our industry partners Teva, Mylan, Aurobindo, Zentiva, BD Rowa and Accord for their event sponsorship and active participation in the workshops and panel discussions.



CUTTING COMPLEXITY OF CEE MARKETS



Discussing the challenges of the current healthcare markets: (left picture, from left to right) Michał Byliniak (President at PGEU) Stefan Jung (PHOENIX group), Marcin Czech (Head of Department of Pharmacoeconomics and President-elect of ISPOR), Michał Pilkiwicz (IQVIA).



The CEE region raises many challenges. For the pharmaceutical industry it is getting more and more difficult to enter these complex markets. For this reason, PHOENIX group invited to the first two-day Healthcare Forum CEE which was held on 30th September and 1st October at Parkhotel Schönbrunn in Vienna.

A small and exclusive group of executives from several industry partners, market experts, policy makers and PHOENIX affiliates participated in this event which focused on "Cutting complexity of CEE markets". Round tables, keynote speeches and presentations provided the basis for lively debates about the current challenges of the CEE healthcare markets and possible solutions.

The group of keynote speakers on day one included Stefan Jung & Stefan Pflug, PHOENIX group, Michał Pilkiwicz, IQVIA Director Supplier Services East Europe, Michał Byliniak, President at Pharmaceutical Group of the European Union (PGEU) and Marcin Czech, former Undersecretary of State at Poland's Ministry of Health and now Head of Department of Pharmacoeconomics and President-elect of ISPOR. Paul Tunnah, Founder and CEO of pharmaphorum, moderated the discussions. The agenda of day two included a series of Round Table discussions, moderated by PHOENIX Country Experts Jasmin Huljaj (MD PHOENIX Croatia), Sebastian Ring (MD Farmexim Romania), Stefan Pflug (Head of Corporate Pharma Services & Sourcing), Nemanja Janković (Head of Com-

mercial Partnerships, PHOENIX group) and Paul Tunnah. Marija Petrovic, Regional Director Pharma Services and Business Development PHOENIX BMS (Balkan), partnered with Dr. Alexander Maier, Head of Service Development, PHOENIX group, to show how PHOENIX group has succeeded in reducing complexity with its All-in-One solutions and in speeding up delivery in Balkans markets with preferential market access, representation services and patient centricity programs. The forum was concluded with a final Round Table Panel featuring Michał Byliniak, Marcin Czech, Michał Pilkiwicz, Stefan Jung and Paul Tunnah.

"I am very happy to see that PHOENIX group is looking for an opportunity to bring all stakeholders together and to discuss the "hottest topics" about the current situation, the market and the future." - Michał Byliniak, President at Pharmaceutical Group of the European Union (PGEU).

As an integrated healthcare provider with a strong presence and extensive knowledge in these complex markets, PHOENIX is focusing on the benefit of patients in CEE region offering solutions based on the company's long-standing expertise and integrated approaches like its All-in-One services.

Check out our
Healthcare Forum
CEE Video



STATE-OF-THE-ART WAREHOUSE IN KØGE



On 6th November 2019, Nomeco, the Danish PHOENIX company, opened the largest logistics centre for pharmaceuticals and healthcare products in the Nordic region. *“With a cost volume of approximately 80 million Euros, it is the largest single investment in the infrastructure of PHOENIX group. This underlines our position in European pharmaceutical logistics,”* said PHOENIX group Board Member Frank Große-Natrop at the opening in Køge, Denmark.

After three years of construction, the healthcare logistics warehouse and distribution centre is finished and impresses with many superlatives: The 25,000 square metre building has the size of three football fields and has a fully automated warehouse. With a height of 30 meters, it offers space for more than 55,000 pallets. Thanks to the high level of automation, up to 1,000 pallets can be moved per hour. Based on the order history, algorithms determine the best possible storage location for each product to ensure the most efficient inbound and outbound processes.

“The central aspects for the construction of our logistics centre were efficiency, quality and security. In an industry where delivery reliability goes hand in hand with patient safety, this is crucial. With the new logistics cen-

tre in Køge, we are continuing to optimise our supply chain and make medicines available for patients even faster,” said Henrik Kaastrup, Managing Director of Nomeco. Geographically, Denmark and Køge, south of Copenhagen, is the ideal location in Northern Europe. In Scandinavia, PHOENIX group is present with Apotek1 in Norway and Tamro in Finland, Sweden, and the Baltics.

In recent years, the pharmaceutical industry has progressively outsourced logistics and distribution services and concentrated on its core business. Nomeco is clearly feeling this demand as the number of clients and the handled volume has significantly increased in the past few years.

The new distribution centre will make the company an even more attractive outsourcing partner for the healthcare industry. *“During the concept development, we relied on our 30 years of experience as the market leader in pharmaceutical logistics. From now on, the logistics centre with its short delivery times will strengthen the supply chain throughout Northern Europe,”* Große-Natrop concluded.

More information: www.nomeco.dk



NEW MEDIPAC FACILITY RELIEVES PHARMACIES



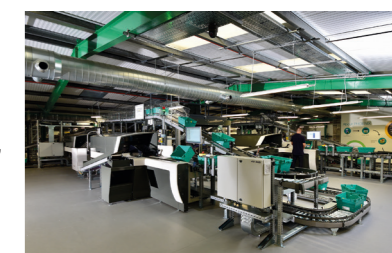
On 30th August 2019, Steve Anderson, PHOENIX UK Group Managing Director, officially opened one of the UK's largest automated pharmacies. Using industry-leading technology, the site in Runcorn currently assembles up to 60,000 repeat prescriptions a day. By the end of the year it will assemble 16 million prescriptions annually for all Rowlands branches in England, Scotland and Wales.



The facility in Runcorn has been operating since June 2019 and provides Rowlands Pharmacy with a “hub and spoke” solution for assembling repeat prescriptions.

Nicky Grundy, PHOENIX UK's head of centralised dispensing and MediPAC project lead explains: *“Each pharmacy order is processed in around three days, from when a pharmacy sends the order to the hub, to when the medicines reach the branch. Once the MediPACs reach Rowlands' branches, pharmacists scan the barcode on the bag, which will link it to the patient medication record. In an instance where a patient might have a controlled drug, the system will then tell them to go and attach that and reconcile any outstanding item to that bag.”*

At the launch Steve Anderson said, *“At every level, the medicines supply chain relies on automation and IT solutions to ensure patients get the medicines they need when they need them at the lowest cost to the NHS.”*



By centralising repeat prescription assembly, PHOENIX UK frees up time for the pharmacy teams to provide support, advice and healthcare services which patients want and need and which the national health services in England, Scotland and Wales are increasingly looking to community pharmacy to provide.

MediPac Facts&Figures

- Up to 60,000 packs assembled per day
- Already more than 2 million packs processed since the opening in June
- More than 250 Rowlands pharmacies in the system

More information
www.allinone.phoenixmedical.co.uk

BETTY 2.0 CONGRESS IN BULGARIA



Vesselin Kunev, Group Sales Director of PHOENIX Bulgaria, welcomed all participants and presented the further development of the program called BETTY 2.0.

At the end of the summer, the Pharmacy Partnership Program in Bulgaria – BETTY, ran its professional training for the second time this year. The meeting took place in Golden sands – a resort near the Bulgarian seaside on 27-29 September 2019.

This particular edition of the event was of real importance because it marked the beginning of a new development stage of the program. More than 250 clients and partners of PHOENIX Bulgaria came to the training to face all the innovations and suggestions. Vesselin Kunev, Group Sales Director of PHOENIX Bulgaria represented the further development of the program which is called BETTY 2.0. After his presentation, he answered every question from the audience. The represented new services include new special trading conditions, new benefits and development of existing ones, loyalty reward, and many more.

The program of the event furthermore included presentations of some industry partners of PHOENIX Bulgaria, including Zentiva, Montavit, Kiat Pharma, Pharma Sales, and Alpen Pharma. The participants had the

opportunity to visit 25 advertising stands hosted by different pharmaceutical companies. The training was highly appreciated by the participants and organisers. We all hope that the new and revived activities in the program will bring more benefits to partners and clients.



Find out more about our BETTY pharmacies in Bulgaria here: <https://betty.bg/>



PATIENT-CENTRIC SERVICES OLO PHARMACIES IN FINLAND

The new Olo pharmacy chain in Finland opened its first pharmacy in Helsinki on 3rd September 2019. Olo is run by pharmacists, health service provider Terveystalo and Tamro, the Finnish PHOENIX company. Concurrently, the brand launched a B2C e-shop.

The first Olo-apteekki pharmacy opened in the capital Helsinki. It is part of completely new pharmacy chain actively supported by pharmacists, health service provider Terveystalo and Tamro combined their forces. Co-operation makes the interface between health and wellbeing services and pharmacies more easily accessible. Pharmacy customers have access to wellbeing services, such as consultation by a nurse, physiotherapist or other healthcare professional.

By means of remote consultations, Terveystalo, running about 260 clinics in Finland, has a digital presence at Olo-apteekki pharmacies (picture bottom right). In addition, pharmacies offer supporting services, such as body composition measurements, consultations by dental hygienists and spirometry tests produced by KAMU Health. Services that are more consumer-driven will be launched within the next few months.

"Even on an international scale, our partnership model is unique, does not only provide customers with medical care, but also with preventive healthcare. The goal of the chain is to act as a local full-service point for



Successful opening of the first Olo apteekki (pharmacy) in Finland in the capital Helsinki on 3rd September 2019.

health and wellbeing", says Aleksi Routama, Managing Director of Olo-apteekki.

Pharmacies offer the most local healthcare services in Finland, and their expertise plays an important part in preventive healthcare, in particular. At best, low-threshold healthcare services offered by pharmacies can speed up treatment and support basic healthcare.

"The operating environment of pharmacies is in a constant flux, and we pharmacists need to be able to keep up. This is why I'm excited about this new partnership model and the opportunities it has to offer. No single pharmacist can achieve any major change – only together we can achieve our goals", says Eeva-Kaisa Mäki-Mojjala, proprietary pharmacist of the first Olo-apteekki pharmacy.



More information:

www.oloapteekki.fi
www.linkedin.com/company/oloapteekki (scan QR Code)



TAMRO INSIGHT DAY IN SWEDEN



On 19th September 2019, Tamro Sweden, a PHOENIX company, invited customers within the industry, pharmacy partners and regional contacts to an event called “Tamro Insikt” (Tamro Insight) with the goal to address current healthcare topics.

The report that was released in Almedalen together with PwC, AbbVie, Roche Diagnostics and Apoteket AB was presented, showing that patients are increasingly willing to monitor their health and to share their data with health care providers to receive a more individualised care. At the same time, the report shows that many patients do not feel understood and taken seriously by the healthcare system.

Consequently, several questions emerged:

- What are the consequences?
- What are the opportunities?
- What role can Tamro take, together with the pharmaceutical industry to contribute to long-term sustainable care?

The day started with a short overview of the business development of Tamro Sweden given by Lars Schenatz, CEO Tamro Sweden AB. A highlight was the presentation of the newly established cooperation between Blue Ocean Sales and Tamro. Birgitta Strömberg, CEO Blue Ocean Sales, presented the opportunities that

emerged thanks to the merger of Tamro and Blue Ocean Sales. Ina Caesar, PhD, PwC Sweden and Jesper Olsson, med. dr, Tamro spoke about the topic “The patients would like to contribute – are the health care systems ready?” Another topic on the agenda was Real World Data (RWD). In this context, Anders Ekholm, a future-oriented patient representative, talked about the role of patients and their relatives regarding data collection. Maarten Sengers, Chancellor’s Office, the Government Offices, the Ministry of Social Affairs, informed and answered questions about the government’s current and intended government assignments.

Johanna Lagergren, strategic business development, Tamro and Jesper Olsson, med. dr, Tamro discussed options how Tamro could widen its independent role in utilising patients and professionals need for person-centering and care efficiency. The event included many interesting discussions and the guests were very positive about the agenda and speakers.

Check out the Tamro
Insight Day Event Video:



BENU LATVIA LAUNCHES DIGITAL LOYALTY CARD



The well-known Latvian pharmacy chain BENU Aptieka, part of PHOENIX group, is the first among pharmacy networks in the country to have launched a new, innovative, customer and environment friendly solution – the Digital Loyalty Card, which is included in the new version of the BENU Aptieka app.

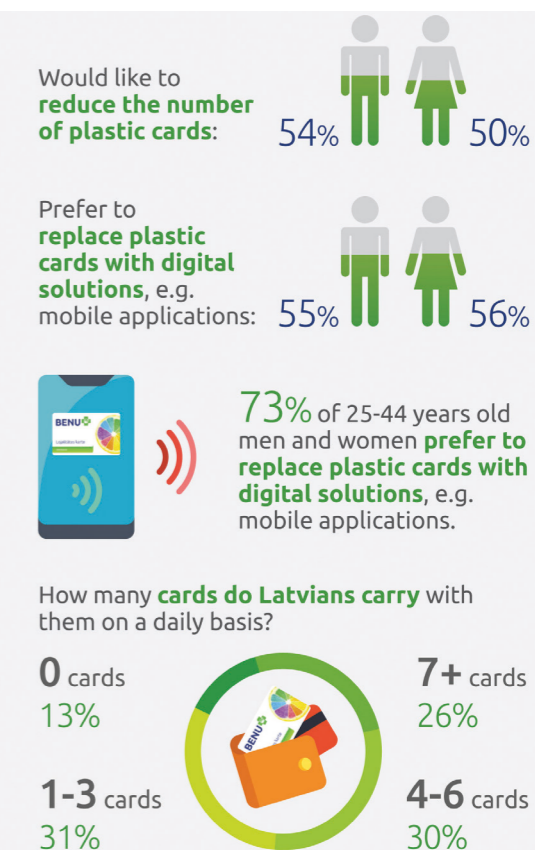
The new Digital Loyalty Card enables customers to make use of all the advantages offered by the loyalty programme of BENU Aptieka in a more convenient and environmentally friendly manner. In September 2019, BENU Aptieka conducted a survey in cooperation with Internet survey and technology company Gemius to find out how many loyalty cards the average Latvians carry with them on a daily basis, as well as to understand their attitude to plastic cards and possible replacement of plastic cards with digital solutions. The results of the survey showed that a majority of respondents would like to reduce the number of cards in their wallets and switch to digital solutions.

Main conclusions:

- Every second Latvian (51%) would like to reduce the number of plastic cards;
- 55% of respondents prefer to replace plastic cards with digital solutions, e.g. mobile applications;
- One of four Latvians (26%) carries seven or more cards on a daily basis.

The upgraded version of BENU Aptieka mobile app offers clients not only the advantages of the Digital Loy-

alty Card, but also several other useful and easy functions, such as history of purchases, reached loyalty level within the Loyalty program, BENU pharmacy locations with detailed contact information and opening hours, promotional offers and possibility to activate reminders of medicine taking.



The latest upgrade of the application in November included the possibility to participate in the annual charity campaign of BENU Aptieka “With cordiality against illness” in a more convenient and modern way. BENU loyalty program customers are participating in the charity campaign by donating the accrued loyalty points. The donated points are converted into money, which is transferred to the Children’s Hospital Fund to support children with oncological disease by helping to cover the treatment costs not compensated by the state. Every customer can determine the amount of his/her loyalty points for donation using the mobile application of BENU Aptieka.

PHARMACY EVENT IN AUSTRIA



For several years, PHOENIX Austria has been organising the annual so called "Tag des Wissens" (Knowledge Day) for pharmacists and their pharmacy teams in Graz and Vienna.

The event aims to strengthen the personal skills of pharmacy team members. After focusing on "boosting sales" last year, this year, both external speakers, Monika Matschnik and Marc Gassert, placed great importance on "professional appearance".



More than 120 participants joined the event in Graz, and the same number on the following day in Vienna, and all of them highly appreciated the presentations from well-known experts.

The event is organised in close cooperation with our industry partners, who are given the opportunity to get in contact with the pharmacy teams, to present their products and to share information. Unlike other events offering opportunities for personal exchange only during short coffee breaks, the Austrian "Tag des Wissens" offers plenty of time for personal interaction and discussions.

As in the previous years, the feedback from all participants and our industry partners was very positive and the events will be resumed in 2020.

For more information, please send an email to: marketing@myphoenix.at

10 YEARS ADIVA CROATIA



In October, the Croatian PHOENIX Pharmacy Partnership Member ADIVA celebrated ten successful years at the annual convention, this year in Osijek.

Partnership, collaboration, sharing ideas about current challenges and opportunities in pharmaceutical industry, perspectives, and views from other countries, ideas for the future were the highlights of this year's convention.

More than 180 pharmacists and colleagues from all over Croatia joined the convention and participated in the interesting presentations and panel discussions with international speakers. The event offered the perfect opportunity to share experiences and good practices and to network. It was an inspiring meeting, with very positive feedback from the participants.



Up-to-date with
our monthly newsletter

Quick and easy to digest like a short **espresso** – subscribe to our monthly news update **All-in-One espresso**:
www.phoenix-all-in-one.eu/newsletter.