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GIRP ANNUAL REPORT 2006/2007

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17th to 19th June 2007, Geneva, Switzerland

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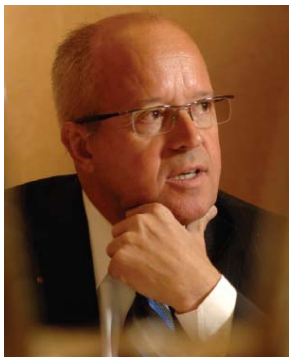
1. MESSAGE FROM THE PRESIDENT



Dear Ladies, Gentlemen,

GIRP's members, the European pharmaceutical full-line wholesalers, through their facilities in Europe meet the challenge of delivering vital, including seldom used, medicines to healthcare professionals. Pharmaceutical full-line wholesalers continue to heavily invest in their facilities to consistently assure the high service levels, which have been developed and maintained through the years. The 450 million citizens in Europe can obtain any medicine which has been prescribed by their physician at an incredibly fast rate in a safe and perfect condition, through the services performed by companies in our sector.

Pharmaceutical full-line wholesalers buy the medicines from the manufacturers and distribute them to the healthcare professionals in Europe. They are the owners of the medicines in this cycle. Due to their stock holding responsibilities, the ownership of the products must remain with the pharmaceutical full-line wholesalers, as they must hold sufficient stock to cover their area. They must deliver all products within a short time period and they must cover the full geographical area of their activity.

The notion held by some that the over 3,500 manufacturers could work individually with the over 160,000 retailers for example dealing with up to 100,000 products is misplaced. Direct distribution would be costly and less efficient as fewer dispensing sources may be supplied much less frequently with medicines. GIRP therefore continually strives to ensure that the concept of full-line wholesalers is promoted to guarantee that those in decision making institutions are fully aware of the indispensability of pharmaceutical full-line wholesaling.

Importantly, pharmaceutical full-line wholesalers recognise a vital public service obligation and function to ensure that all medicines, even seldom used, but vital medicines, are available at the dispensing point in order to complete the needs of the patient. GIRP members guarantee high quality and safety standards as set down in the European Good Distribution Practice (GDP) guidelines in order to meet the ultimate needs of the patients who can be assured that the medicine they receive through the trusted channel is safe and will not harm them. For the sake of all citizens in Europe all partners in the supply chain must work together in an interlinked collaborative manner to ensure the continuous supply of all available medicines in a safe and efficient manner.

But, our business is not as straight forward as delivering the right medicines to the right patients at the right time. There is so much more to our members' businesses. While our core services are based on the principles of bridging time and distance, other services offered to our supply chain partners are not only growing in importance, but are also setting new trends for shaping the future of the sector.

Yours sincerely,

René Jenny
GIRP President

2. MESSAGE FROM THE DIRECTOR GENERAL

Dear Ladies and Gentlemen,

We have achieved a great deal over the last twelve months through the various initiatives in which GIRP is involved. We have remained fully committed to promoting our priorities in all facets of our work. Through our active contribution to the work of the pillars of the Pharmaceutical Forum for instance, we continue to enhance our position, vis a vis, the European institutions and other pertinent authorities including the health authorities of the Member States of the European Union. On all occasion we have taken the opportunity to ensure that the pharmaceutical wholesalers' voice is part of the process. In this respect we have been underlining the vital public service role and function offered and performed by full-line wholesalers as part of their contribution to the overall health and well being of citizens across Europe.

We have intensified our activities in the anti counterfeiting arena. We are now very active in participating as part of initiatives such as the WHO International Medicinal Products Anti Counterfeiting Task Force (IMPACT) and its working groups, the Council of Europe's Ad Hoc Group on Counterfeit Medicines and with the European Commissions project on assessing the counterfeit medicines in distribution channels. Last, but not least we have been very proud to launch our own "Safe Supply" initiative with our supply chain partners in 2006 and have to continue to work very hard to secure the support for this initiative from our supply chain partners.

Our sector has been experiencing some major transformation, but much of this change is encouraging full-line wholesalers to adapt to market conditions and the business of pharmaceutical full-line wholesaling is evolving into a vibrant health care provider industry whereby added value services are providing opportunities for expansion. In this respect not only is the range of services growing in scope, but the vital role and function of full-line wholesalers grows in importance. To reflect the importance of some of these new trends our annual meeting is to address "from the supply chain to the value chain: boosting the value added service for our supply chain partners".

During the last twelve months we have also seen some immense changes occurring in our sector which have presented us with many difficult challenges. We have tried to meet these challenges head on from the beginning and have remained committed to finding the right way forward to overcome the difficulties and will continue to do so in the year ahead. Our association is vital for ensuring that the common voice of the members is heard when and where needed. In this respect I would also like to express my gratitude to all members for their willing and helpful cooperation throughout the year.

My particular thanks to our President René Jenny for his continuous support and valuable advice for the running of our association can not be gratefully expressed enough. His personal support goes well beyond the traditional role of a President and he is ready at a moment's notice to attend to the business of our association. I would also like to express a very special word of thanks to all my colleagues in the GIRP office for their hard work and dedication throughout the year and their contribution towards achieving our goals and objectives.

We can all together look ahead to the challenges which we will face in the coming months and in the same spirit of cooperation we can together achieve common successes. We shall continue to pursue our mission in all our activities whether at the national or international level.

Yours sincerely,

Monika Derecque-Pois
Director General

3. GIRP MISSION AND OBJECTIVES

The vital link in healthcare

GIRP, 'Groupement International de la Répartition Pharmaceutique' or 'European Association of Pharmaceutical Full-line Wholesalers', is the umbrella organisation of pharmaceutical full-line wholesalers in Europe. Pharmaceutical full-line wholesalers are the central element of the healthcare supply chain of medicines as they ensure that patients and citizens alike have access to all medicines. Pharmaceutical full-line wholesalers continually ensure that the full range of medicines is available at any time, any place, anywhere. GIRP and its members play the vital and value-adding role in the healthcare supply chain, by supplying retail pharmacies with more than 100,000 products in a timely, cost efficient and service intensive manner.

GIRP members create the vital link that ensures availability and continuity of the supply of all medicines and healthcare products to the citizens of Europe. Wholesaling, therefore, is the vital link in the effective delivery of healthcare in Europe.

The members of GIRP commit to:

- carrying a full range of products continuously, including products requiring special handling
- ensuring product availability to patients within a matter of hours continuously
- creating and maintaining quality standards that ensure, above all, safety and integrity of the medicine when delivered to the retail pharmacist
- fulfilling public service obligations

and thereby ultimately to ensuring the vital link in the delivery of healthcare to citizens of the EU. Every European patient can be sure to receive the prescribed product, as patient's safety is our main concern!

In summary, GIRP members create the vital link that ensures availability and continuity of the supply of all medicines and healthcare products to the citizens of Europe. Wholesaling, therefore, is the vital link in the effective delivery of healthcare in Europe.

4. FINANCIAL REVIEW

The association is financed through contributions of members, conference fees as well as sponsorship.

The annual accounts for 2006 are submitted in accordance with the legal stipulations and held at the associations registered office.

5. GIRP ACTIVITIES

Introduction

GIRP has been very active in the large and diverse range of activities during the last twelve months and much work and time has been spent on the implementing the important work programme and decisions by the organs of our association, namely our Steering Committee, Executive Committee and General Assembly. GIRP continued to work with the European Institutions, Council of Europe, World Health Organisation and all stakeholders active in the pharmaceutical and healthcare field. Herein we offer an overview of some of the major highlights from the past year.

Meetings and events

GIRP held its autumn meeting on 22nd November 2006 in Brussels, Belgium on the subject matter of "A Zero Tolerance Approach to Counterfeit Medicines", which was a huge success, the high being the launch of the "Safe Supply" chain coalition. "Safe Supply" involves the coming together of our supply chain partners to assess and work on issues of common interest with the aim of collaborating in an interlinked approach to ensuring a zero tolerance to counterfeit medicines.

The 48th Annual General Meeting held in Geneva Switzerland on 17th to 19th June 2007 opened a lively debate on the added value services offered and provided by pharmaceutical full-line wholesalers. Members discussed the added value services currently offered by the pharmaceutical full-line wholesale sector and eagerly listened to the sectors supply chain partners appreciation and future expectations.

GIRP's principal management organs (Steering Committee, Executive Committee and General Assembly) met in accordance with the association's statutory requirements to ensure the proper governance and management of the association. The GIRP secretariat has throughout the year actively implemented all decisions of the associations' bodies to ensure that the mission of the association is constantly achieved and full-line wholesaler's vital public service role and function is promoted and defended at all relevant levels within the associations' ambit of activity.

Anti-counterfeiting activities

We have been very active in the wide range of anti-counterfeiting activities at the European and international levels. We are a full participant in the WHO lead International Medicinal Products Anti-Counterfeiting Task force (IMPACT) and the working groups on Technology; Communications; Regulatory Implementation, and Legislation. GIRP has been quite recently engaging with reviewing and commenting on the WHO Good Distribution Practice Guidelines and the proposed introduction of measure aimed at preventing counterfeit medicines. We are also a member of the Council of Europe's Ad Hoc Group on Counterfeit Medicines and we have been proactively contributing to the European Commission's project on distribution channels and counterfeit medicines. More recently, GIRP has joined its supply chain partner, the European Federation of Pharmaceutical Industries and Association (EFPIA) the representative body of research based manufacturers and the Pharmaceutical Group of the European Union (PGEU) the representative body of Europe's community pharmacies, in the EFPIA initiative on the coding and identification of medicines. GIRP remains committed to working with all supply chain partners on all projects and ideas which have the impact of further securing the safety of the supply chain.

Pharmaceutical Forum

Over the last twelve months and since its inception, GIRP has been an active participant in the Pharmaceutical Forum. As one of the ten stakeholders associations having a seat in the Forum, together with Member States and the European Institutions, GIRP is committed to ensuring that its priorities and objectives are fed into the discussions of the Working Groups on Information to Patients and Pricing. GIRP is pleased that much of its contribution is taken on board and reflected in all communications and instruments being developed by the initiative.

Health services consultation

GIRP welcomed the European Commissions consultation on possible community action on health services. GIRP thoroughly assessed the consultation and responded accordingly to the nine questions posed. GIRP looks forward to the further steps in this area.

Health Policy Forum

GIRP is an active member of the EU Health Policy Forum and fully support the valuable work of the group. As part of the EU Health Policy Forums' objectives to ensure complete transparency of its members; GIRP has taken all aspect of the transparency initiative into account.

6. GIRP MEMBERSHIP

6.1. FULL MEMBERS

Currently, GIRP has 28 Full Members consisting of 24 national associations in Europe (the two national associations of Greece – PAPW and OSFE – which share voting right), three major pan-European pharmaceutical wholesaling companies (Alliance UniChem, Celesio and Phoenix) and a group uniting cooperatives in European countries (SECOF – Sociedad Europea de Cooperacion Farmacéutica).

6.1.1. Full Member Associations

AUSTRIA	***ARGE Pharmazeutika*** Arbeitsgemeinschaft des pharmazeutischen Großhandels Palais Schlick, Türkenstraße 25/16 A – 1090 Vienna	Tel.: +43 1 409 44 86 Fax: +43 1 409 44 87 40 Email: office@argepgh.at Website: www.argepgh.at
BELGIUM	***NVGV - ANGR*** Association Nationale des Grossistes-Répartiteurs en Spécialités Pharmaceutiques Av. Edmond Van Nieuwehuyse 8 B – 1160 Brussels	Tel.: +32 2 788 05 00 Fax: +32 2 778 05 01 Email: info@fedis.be Website: www.fedis.be
CZECH REPUBLIC	***AVEL*** Association of Pharmaceutical Full-line Wholesalers Troilova 440/6 CZ – 10800 Praha 10	Tel.: +420 2 7477 8329 Fax.: +420 2 7477 8324 Email: pavel.suchy@chello.cz
DENMARK	***MEGROS Foreningen af medecingrossister*** Association of Pharmaceutical Wholesalers Amagertorv 11, box 2111 DK – 1160 Copenhagen K	Tel.: +45 33 12 60 40 Fax: +45 33 14 19 33 Email: jke@nomeco.dk
ESTONIA	***ERHL*** The Estonian Association of Pharmaceutical Wholesalers Pärnu road 139c EST – 11317 Tallinn	Tel.: +372 650 1901 Fax: +372 650 1900 Email: janalaasalu@hot.ee
FINLAND	***APTEEKKITAVARATUKKUKAUPPIAAT r.y. (ATY)*** Association of Pharmaceutical Distributors P.O.Box 150 SF – 00251 Helsinki	Tel.: +358 9 431 561 01 Fax: +358 9 431 561 05 Email: aty@aty.fi
FRANCE	***CSRP*** Chambre Syndicale de la Répartition Pharmaceutique 47 Rue de Liége F – 75008 Paris	Tel.: +33 1 42 94 01 25 Fax: +33 1 42 94 19 84 Email: csrp@csrp.fr Website: www.csrp.fr
GERMANY	***PHAGRO e.V.*** Bundesverband des pharmazeutischen Großhandels P.O. Box 17 01 50 D – 60075 Frankfurt	Tel.: +49 69 975 87 60 Fax: +49 69 975 87 633 Email: phagro@phagro.de Website: www.phagro.de
GREECE	***PAPW***[1] Panhellenic Association of Pharmaceutical Wholesalers and Qualified Pharmacists 34 Beranzerou Street GR – 1 04 32 Athens	Tel.: +30 210 5227519 Fax: +30 210 5221762 Email: papw-gr@otenet.gr

[1] one common voting right with OSFE

GREECE	***OSFE***[2] Federation of Cooperative Pharmacists of Greece 2-4 Pigis Street GR – 106 78 Athens	Tel :+30 1 38 04 634 Fax:+30 1 38 04 194 Email: osfe@otenet.gr
HUNGARY	***HAPW*** Hungarian Association of Pharmaceutical Wholesalers Radvány u. 20/A H – 1118 Budapest	Tel.: +36 1 309 02 49 Fax: +36 1 309 02 48 Email: php-gynsz@nextramail.hu Website: http://www.php-gynsz.hu
IRELAND	***PDF*** Pharmaceutical Distributors Federation Glandore House, 33 Fitzwilliam Place IRL – Dublin 2	Tel.: +353 1 2024855 Fax: +353 1 2024855 Email: mcpakieran@iol.ie
ITALY	***ADF*** Associazione Distributori Farmaceutici Via Milano, 58 I – 0 0184 Roma	Tel.: +39 06 487 01 48 Fax: +39 06 478 249 43 Email: adf@adfsalute.it Website: www.adfsalute.it
LATVIA	***APWL*** Association of Pharmaceutical Wholesalers of Latvia Hospitalu Str. 55 LV – 1 013 Riga	Tel.: +371 737 70 24 Fax: +371 737 70 24 Email: lzla@latnet.lv
LITHUANIA	***ALPW*** Association of Lithuanian Pharmaceutical Wholesalers Laisvés pr. 75 LT – 06144 Vilnius	Tel.: +370 5 279 23 90 Fax: +370 5 279 23 91 Email: asociacija@mail.vaistai.lt
LUXEMBOURG	***GGRLPP*** Groupement des Grossistes Répartiteurs Luxembourgeois en Produits Pharmaceutiques 60, Rue de la Vallée L – 2661 Luxembourg	Tel.: +352 45 07 07 Fax: +352 45 63 46 Email: hanff@hanff.lu
NETHERLANDS	***BG Pharma*** Bond van Groothandelaren in het Pharmaceutische Bedrijf Adriaan Goekooplaan 5 .Postbus 29822 NL – 2502 LV The Hague	Tel.: +31 70 338 46 54 Fax: +31 70 351 27 77 Email: bgpharma@verbondgroothandel.nl
NORWAY	***NAPW*** Norwegian Association of Pharmaceutical Wholesalers c/o Norsk Medisinaldepot AS Sven Oftedals vei 10, Postboks 183 - Kalbakken N – 0903 Oslo	Tel.: +47 22 16 96 00 Fax: +47 22 16 61 21 Email: arne.overby@nmd.no Website: www.nmd.no
POLAND	***PPWE*** Association of Polish Pharmaceutical Wholesalers Employers 5 Dluga St. PL – 05 830 Nadarzyn Wolica	Tel.: +48 22 720 6250 Fax: +48 22 722 6668 Email: taras@parafarmacja.com.pl
PORTUGAL	***GROQUIFAR*** Associação de Grossistas de Produtos Químicos e Farmacêuticos Av. António Augusto de Aguiar, 118 1° Andar P – 1050-019 Lisbon	Tel.: +351 213 193 860 7 Fax: +351 213 193 869 Email: farmaceutica@groquifar.pt Website: www.groquifar.pt
SLOVENIA	***GZS*** Zdruzenje za trgavino Ljubljana; Chamber of	Tel.: +386 1 5898 216 Fax: +386 1 5898 219

[2] one common voting right with PAPW

	Commerce and Industry of Slovenia – Trade Association, Section of Wholesalers of Pharmaceutical and Medical devices Dimiceva 13 SLO – 1000 Ljubljana	Email: Barbara.krivic@gzs.si
SPAIN	***FEDIFAR*** Federación Nacional de Asociaciones de Mayoristas Distribuidores de Especialidades Farmacéuticas y Productos Parafarmacéuticas General Oràa 70 E – 28006 Madrid	Tel.: +34 91 562 40 25 Fax: +34 91 411 43 26 Email: mvaldes@fedifar.com
SWEDEN	***LDF*** Läkemedelsdistributörsföreningen Swedish Association of Pharmaceutical Wholesalers c/o Tamro AB, P.O. Box 49 SE – 401 20 Göteborg	Tel.: +46 31 767 75 00 Fax: +46 31 767 78 16 Email: hans.whalen@tamro.com
SWITZERLAND	***pharmalog.ch*** Swiss Pharma Logistics Association Avenue de Tivoli 3, Case Postale 693 CH – 1701 Fribourg	Tel.: +41 26 347 41 58 Fax: +41 26 347 41 40 Email: info@pharmalog.ch Website: www.pharmalog.ch
UNITED KINGDOM	***BAPW*** British Association of Pharmaceutical Wholesalers 90 Long Acre UK - WC2E 9RA London	Tel.: +44 20 7031 0590 Fax: +44 20 7031 0591 Email: msawer@bapw.net Website: www.bapw.net

6.1.2. Full Member Companies

ALLIANCE UNICHEM	2 The Heights, Brooklands; UK – Weybridge/Surrey, KT13 0NY Tel.: +44 1932 870 550; Fax: +44 1932 870 555 Email: enquiries@allianceboots.com; Website: www.allianceboots.com
CELESIO AG	Neckartalstraße 155; D – 70376 Stuttgart Tel.: +49 711 5001 405; Fax: +49 711 5001 500 Email: service@celesio.com; Website: www.celesio.com
PHOENIX Pharmahandel AG & Co.	Pfingstweidstraße 10-12; D – 68199 Mannheim Tel.: +49 621 85050; Fax: +49 621 8505295 Email: info@phoenix-group.eu.com; Website: www.phoenix-group.eu.com
SECOF	Passeo de la Castellana 53; E – 28046 Madrid Tel.: +34 91 448 56 62; Fax: +34 91 446 45 99 Email: info@farmintesa.com; Website: www.farmintesa.it/index/secof/secof.html

6.2. ASSOCIATED MEMBERS

6.2.1. Associated Professional Members

Currently, GIRP has ten Associated Professional Members; four Associated Professional Member Associations and six Associated Professional Member Companies:

- associations of Bulgaria, Romania, Slovakia and Turkey
- pharmaceutical wholesaling companies active in Bulgaria, Croatia, Romania, Russia, Ukraine and Slovakia

The Russian company Katren has applied for GIRP Associated Professional Membership. The application was acknowledged by the GIRP Executive Committee of 19th January 2007 and will have to be approved by the GIRP Annual General Assembly, which will take place in Geneva on 17th June 2007.

6.2.1.1. Associated Professional Member Associations

BULGARIA	***ATEL*** Association of Pharmaceutical Wholesalers 1 G.M. Dimitrov Blvd.	Tel.: +359 2 96 03 670 Fax: +359 2 96 03 703 Email: atel@mail.netplus.bg

	BG – 1172 Sofia	
ROMANIA	***RAPWI*** Romanian Association of Pharmaceutical Wholesalers and Importers Str. Ion Campineanu nr. 25 – Bloc 9 Turn - Etaj 6 – Ap. 33 RU – Bucharest Sector 2	Tel.: +40 21 313 75 45 Fax: +40 21 313 75 45 Email: ileana.niculescu@adim.ro
SLOVAKIA	***ADL*** Asociácia Dodávatel ov Liekov A Zdravotníckych Pomôcok / Association of drugs and Healthcare Equipment suppliers Heydukova 1 SK – 811 08 Bratislava 1	Tel.: +421 2 52 96 24 12 Fax: +421 2 52 63 11 88 / 87 Email: adl@adl.sk
TURKEY	***TEKB*** Association of Pharmacists Ömer Avni Mah. Prof. Tarik Zafer Tunaya Sk. Gümüşsuyu İş Merkezi No.14 K.3 34427 Gümüşsuyu – Beyoğlu – Istanbul	Tel.:+ 90 212 251 89 80 Fax:+ 90 212 639 04 44 Email: mahir@tekb.org.tr Website: www.bizimeczane.com

6.2.1.2. Associated Professional Member Companies

BULGARIA	***Commercial League*** National Pharma Centre Inc. 1 G. M. Dimitrov Blvd BG – 1172 Sofia	Tel.: +359 2 962 5451 Fax: +359 2 962 5059 Email: g.semova.hq@comleague.com
CROATIA	***MEDIKA d.d.*** Capraska 1 CR – 10000 Zagreb	Tel.: +385 1 2412 651 Fax: +358 1 2371 441 Email: damir.kustrak@medika.hr
ROMANIA	***A&D Pharma*** B-dul Marasesti nr. 2 RO – 7000 Bucharest	Tel.: +40 21 3017474 Fax: +40 21 3017475 Email: laura.florea@adpharma.ro Website: www.adpharma.ro
RUSSIA	***SIA International, Ltd.*** Bld. 217, 6, Novoposelkovaya str. RU – 125363 Moscow	Tel.: +7 095 967 6940 Fax: +7 095 258 7588 Email: sia@siamed.ru
UKRAINE	***Alba-Ukraine*** 100, Shevchenka Str. - Boryspil UK – 08300 Kyiv Region	Tel.: +38 044 490 3271 Fax: +38 044 490 3271 Email: office@alba.kiev.ua
SLOVAKIA	***West Export Import Company s.a.*** Tomašikova 58 SK – 08001 Prešov	Tel.: +421 90 5710 340 Fax: +421 51 7710 340 Email: ergo@west.sk

6.2.2. Associated External Members

Currently, GIRP has two Associated External Members: Janssen Pharmaceutica (Belgium) and Amacol (Malta).

The British company Abachem Ltd. has applied for GIRP Associated External Membership. This will have to be approved by the GIRP Annual General Assembly, which will take place in Geneva on 17th June 2007.

Supporting Membership is included in Associated External GIRP Membership.

6.2.3. Supporting Members

Currently, GIRP has six Supporting Members. Supporting Members are equally Associated External Members of GIRP.

PARTNERSHIP SPONSOR

IMS	***IMS HEALTH*** Avenue de Louise 222; B – 1050 Brussels, Belgium Tel.: +32 2 627 32 51; Fax: +32 2 649 67 75 Email: Egilissen@be.imshealth.com; Website: www.imshealth.com

ASSOCIATED SPONSORS

Insight Health	***Insight Health GmbH & Co. KG*** Auf der Lind 10; D – 65529 Waldems-Esch, Germany Tel.: +49 6126 95512; Fax: +49 6126 95520 Email: Rlederer@insight-health.de; Website: www.insight-health.de
Knapp	***Knapp Logistik Automation*** Günter Knapp Str. 5-7; A – 8075 Hart bei Graz, Austria Tel.: +43 316 4950; Fax: +43 316 491394 Email: sales@knapp.com; Website: www.knapp.com

SUPPORTING SPONSORS

SSI Schäfer Peem	***SSI Schäfer Peem*** Fischeraustr. 27; A – 8051 Graz, Austria Tel.: +43 316 6096-713; Fax: +43 316 6096-462 Email: m.preiss@ssi-schaefer-peem.com; Website: www.ssi-schaefer.de
Klug integrierte Systeme	***Klug integrierte Systeme*** Lindenweg 13; D – 92552 Teunz, Germany Tel: +49 96 71 / 92 16-255; Fax: +49 96 71/92 16-6255 Email: awohlfarth@klug-is.de; Website : www.klug-is.de
IBS	***International Business Systems GmbH*** Deelbögenkamp 4c.; D – 22297 Hamburg, Germany Tel.: +49 40 514 51 0; Fax: +49 40 514 51 11 Email: ibsinfo@ibs-software.de; Website: www.ibs-software.de