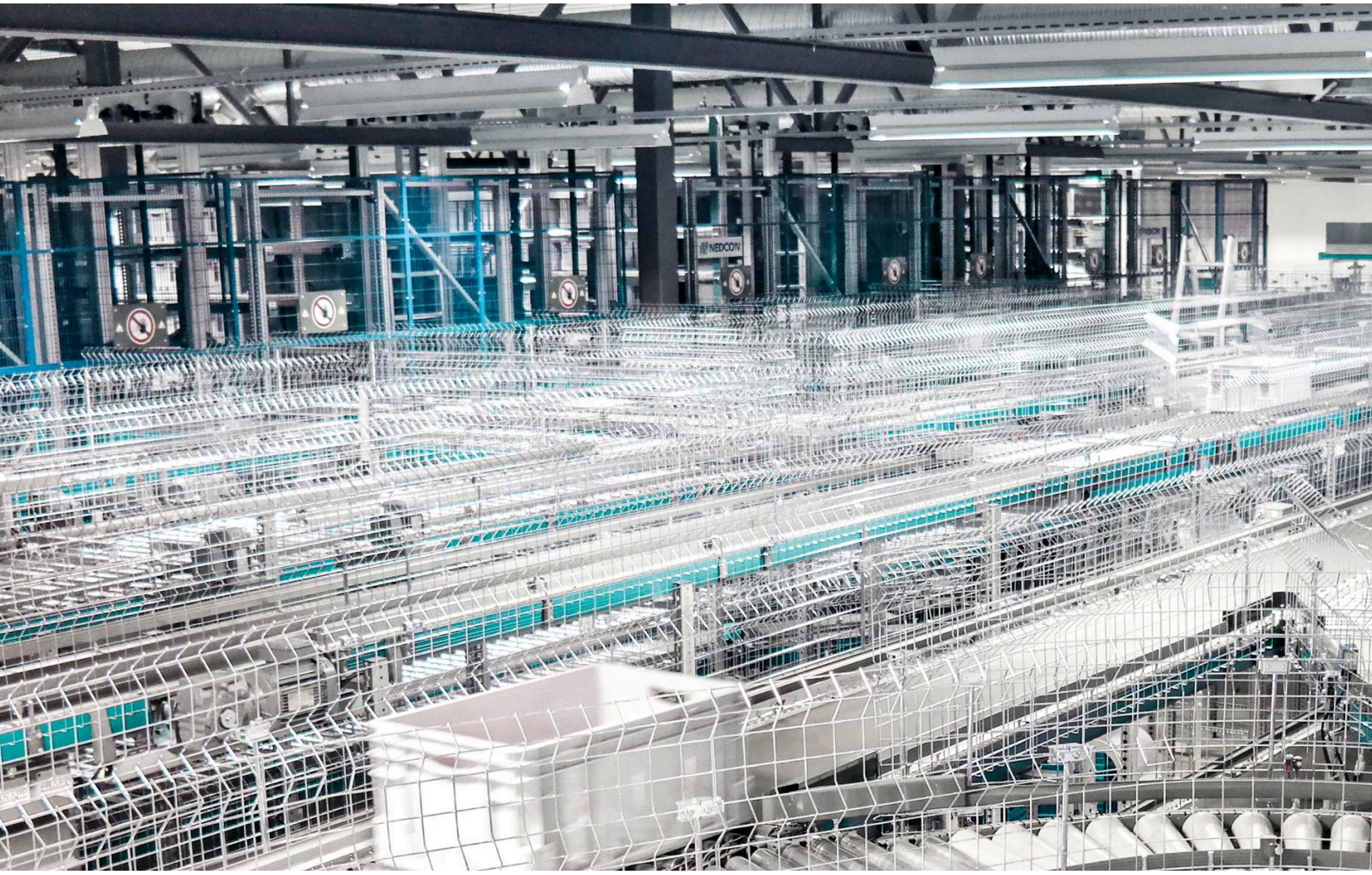
GIRP

the vital link in healthcare



ANNUAL REPORT 2023-2024

FOREWORD FROM GIRP PRESIDENT



Dear Members and Partners,

As we close the chapter on another year, I am proud to reflect on the remarkable progress we have made as an organization, as a sector, and most importantly, as a community. Over the past year, GIRP and its members have once again demonstrated their unwavering dedication to ensuring that patients across Europe receive the medicines they need, when and where they need them.

This year has been one of both opportunity and challenge. From the rapidly evolving healthcare landscape to economic pressures and regulatory shifts, we have faced numerous obstacles. Yet, it is in these moments of challenge that our sector's strength truly shines.

At GIRP, collaboration remains at the heart of our success. Our ability to come together as partners and allies—whether in ensuring the continuous availability of essential medicines or in addressing emerging trends like digitalization and ESG—is testament to the strength of our network. The work of our members often goes unseen by the public, but it is no less critical. Our collective efforts ensure that patients receive the care they need, when and where they need it.

I would like to take this opportunity to express my deepest gratitude to all our members, sponsors, and partners and of course, our great team at GIRP for their unwavering commitment to our shared mission. For those who have been with us on this journey for many years, your dedication continues to inspire. To our newer members, we welcome your fresh perspectives and look forward to the ideas and innovation you bring. Looking ahead, the importance of innovation and adaptability cannot be overstated.

I am also delighted to welcome Mr. Kasper Ernest as GIRP's new Director General. With his extensive experience and vision, Kasper brings new energy to our organization and a forward-thinking approach that will undoubtedly strengthen our collective efforts. His leadership will be vital as we continue to navigate the complexities of the healthcare ecosystem and advocate for the policies that enable our members to thrive.

As we look ahead, I am confident that our shared dedication will continue to drive our sector forward. Together, we can ensure that healthcare distribution remains a cornerstone of European healthcare, delivering the medicines and health outcomes that patients depend on.

Thank you once again for your trust and collaboration. It is through your efforts that we continue to advance our shared mission of improving patient care across Europe.

Sincerely,



Bernd Grabner
President
GIRP

02 TABLE OF CONTENTS

01 Foreword from GIRP President Page 2

02 Table of Contents Page 3

03 Who We Are Page 4

04 About Our Sector Page 7

05 GIRP in Data - *Presented by IQVIA* Page 12

06 Members and Partners Page 19

07 Contact Us Page 30



03 WHO WE ARE



About GIRP

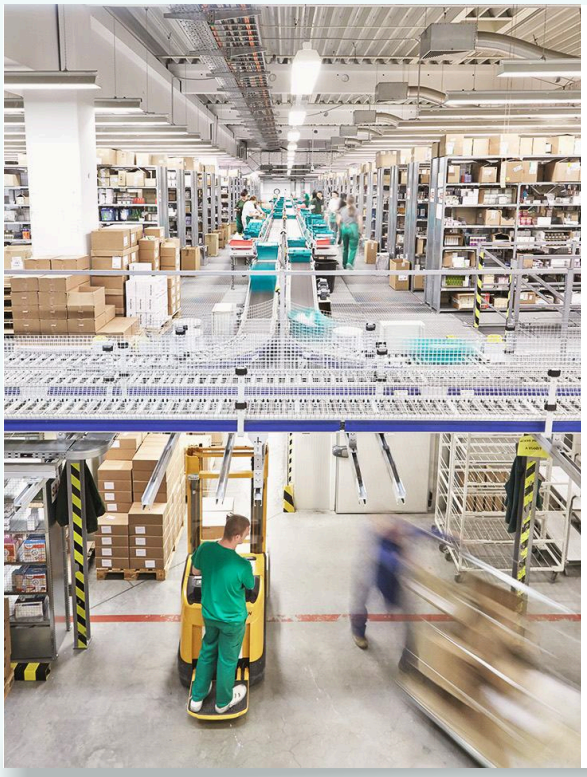
GIRP, the European Healthcare Distribution Association, is the umbrella organisation for full-service healthcare distributors in Europe. It represents the national associations of over 500 pharmaceutical wholesalers serving 33 European countries, as well as major international and pan-European healthcare distribution companies. GIRP members employ over 140,000 people and distribute around 15 billion packs of medicines, as well as a wide range of healthcare products per year. As the vital link in healthcare, they are committed to ensure that every patient has access to his or her prescribed medicine wherever needed.

GIRP offers its members individual as well as collective support services and assistance affecting on a daily basis the business of full-service healthcare distributors. GIRP works with national associations and company members through the provision of advice, information, statistics, and other data. The aim is to provide tailor-made services to match members' unique needs, priorities, and challenges.

GIRP firmly believes that rigorous and continuous cooperation at all levels of the healthcare supply chain is key to the safe and efficient distribution of medicines from the manufacturer through to the patient.

Full-Service Healthcare Distribution

CORE SERVICES



For all products: Rx, Gx, OTC, medical devices, in vitro diagnostics, food supplement, para-pharmaceuticals, pharma-cosmetics.

- **Storage, pick, pack, and ship** according to GDP.
- **Quantity-based** buffer function.
- **Stock-management** and j**ust-in time delivery** according to GDP.
- **Pre-financing** of logistics supplies.



03 WHO WE ARE

VALUE ADDED SERVICES:



TO MANUFACTURERS:

- Logistics services / pre-wholesaling
- Individual product track & trace
- Market intelligence
- Market access services
- Quality & professional services
- Waste management services
- Clinical trial logistics

TO PHARMACISTS

- Marketing & sales support
- Education & training
- Patient services support
- Logistics platform of health services
- Product specific training





TO PATIENTS

- Individual patient packaging services
- Patient communication services
- Monitoring services
- Holding national security stock for emergencies
- Repeat prescription services
- Integrated healthcare applications

03 WHO WE ARE

More About GIRP

As the **vital link in healthcare,** GIRP and its members are committed to developing and providing innovative and efficient healthcare services to improve the health and well-being of patients across Europe. By promoting **trust, partnership,** and **innovation,** we help millions of patients in pharmacies and other healthcare institutions to receive the right medicine at the right time.

The premier platform reaching across Europe and beyond with expertise and experience for our partners' excellence.

33 countries

Including all EU/EEA/ EFTA countries (except Cyprus and Iceland), as well as China, Serbia and Turkey



Safe and sufficientsupply of over 100,000 products

15 bn packs of medicines/year
62 mio packs of medicines/day

From 3,500 manufacturers to

500+ pharmaceutical wholesalers

200,000 pharmacies& healthcare professionals acrossEurope

1,260 warehouses

35	18.8	2.5 h
Different products per delivery	Different manufacturers per delivery	Average deliverytime

GIRP MEMBERS COUNT:

140,000 employees

Quality, integrity, excellence | GIRP members are trusted supply chain partners **the vital link in healthcare.**

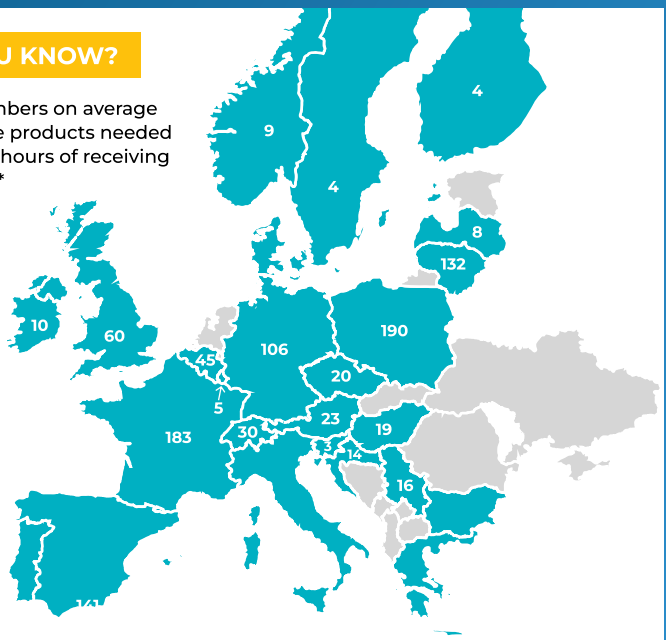
04 ABOUT OUR SECTOR

WAREHOUSES ALL OVER EUROPE

Through their extensive network of warehouses across Europe, full-service healthcare distributors can deliver the medical products where and when needed. This way, they maintain customer satisfaction at the highest level.

DID YOU KNOW?

GIRP members on average deliver the products needed within 2.5 hours of receiving the order!*



* Weighted average in DE, ES, FR, IT, NL, UK
Source: Data Collection 2020

Full-Service Healthcare Distribution

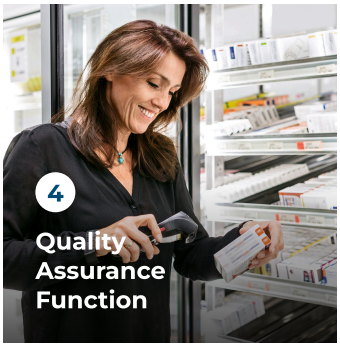
In Data

THE 5 CORE FUNCTIONS OF FULL-SERVICE HEALTHCARE DISTRIBUTORS:











04 ABOUT OUR SECTOR

1 Full Supply And Stock-keeping Function

Full-service healthcare distributors ensure, via their customers, that the needs of patients are met by guaranteeing the continuous availability of a complete assortment of products, in range and depth, as set by the authorities and the market.

Facts and figures

Items on stock held by full-service healthcare distributors: 18,650 - 100,000 (depending on the size of the market and the number of products authorised to be marketed).

Full-service healthcare distributors deliver the required number of medicinal products by:
- their close-knit distribution networks and high delivery frequencies from their warehouses.
- holding safety stock to meet unexpected peaks in demand.

Inventory turnover differs from product to product, ranging from a month to just a few days

The weighted average for the six largest countries in Europe is 29 days, which means stock turnover occurs approximately 12.6 times a year

2 Immediate Medicines Availability And Delivery Function

Immediate delivery of medicines

- Full-service healthcare distributors ensure timely patient treatments by delivering the medicinal products needed in the required quantity and just in time.
- Full-service healthcare distributors protect the healthcare system from high additional costs that would be caused by delays in delivering urgently needed medicines.

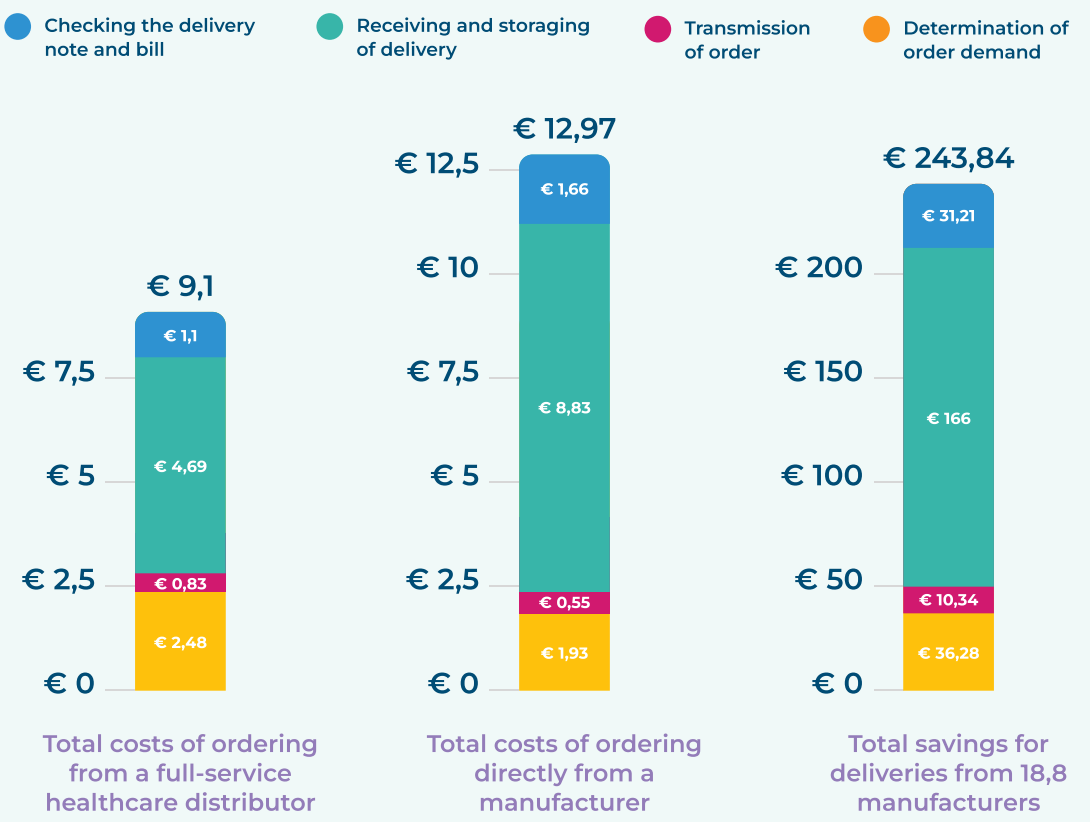
Delivery time and frequency

	Full-service healthcare distributors	Short-line wholesalers	Direct sales from manufacturers
Average delivery frequency (hours)	2.5 hours	20.5 hours	57.86 hours
Average deliveries per week	15.9	4.34	3.66

Weighted average in DE, ES, FR, IT, NL, UK
Source: GIRP members

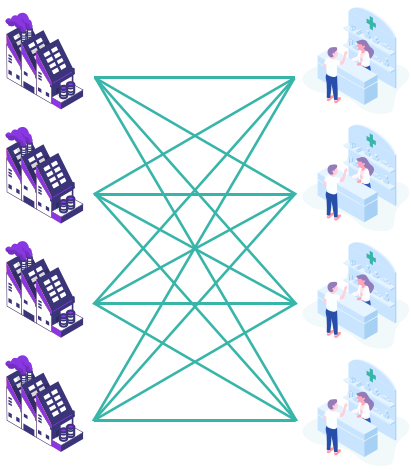
3 Bundling Function: Pooling of Products And Transactions

- Pharmaceutical full-service healthcare distributors are pooling on average products of 18.8 manufacturers per delivery.
- The cost difference between a delivery from a single manufacturer compared to a delivery from a pharmaceutical full-service healthcare distributor is € 3.87.
- The bundling of products from 18.8 manufacturers in one delivery through a full-service healthcare distributor saves € 234.84 in order management cost for a pharmacy.

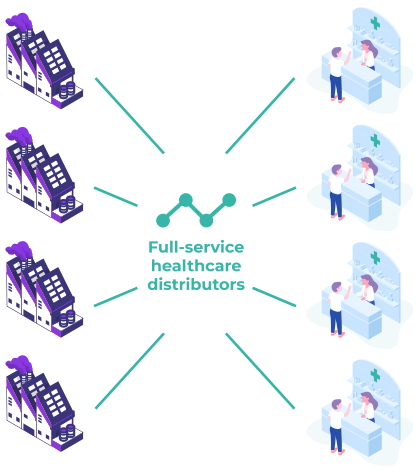


Source: IPF Study

Direct Distribution
~ 100 bn transactions



Full-service Healthcare Distribution
~ 800 mio transactions



4 QUALITY ASSURANCE FUNCTION

Full-service healthcare distributors' quality assurance systems ensure that:

- Medicinal products are procured, held, supplied, or exported in a way that is compliant with the requirements of Good Distribution Practice (GDP) (2013/C 343/01).

- Management responsibilities are clearly specified.

- Products are delivered to the right recipients within a very short time period.

- Records are made and kept simultaneously.

- All personnel involved in full-service healthcare distribution activities is continuously trained in GDPs and deviations from established procedures are documented and investigated.

- Appropriate Corrective and Preventive Actions (CAPA) are taken to correct deviations and prevent them in line with the principles of quality risk management.

- Since the entry into force of the Falsified Medicines Directive (FMD) and its Delegated Regulation (DR) in 2019, full-service healthcare distributors are fully compliant to the new obligations and thereby further protect the supply chain from the entry of falsified medicines.

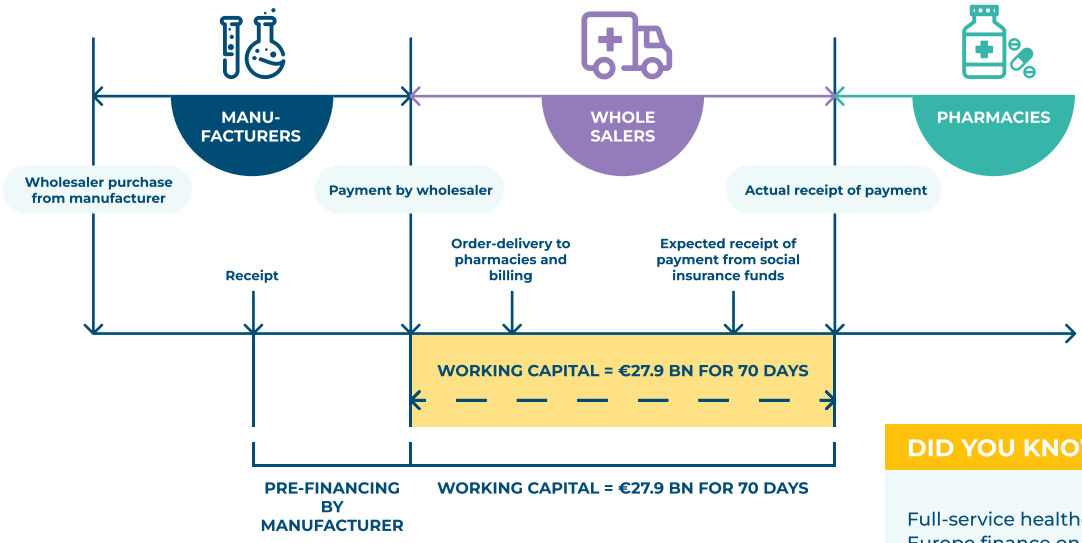
5 FINANCING FUNCTION

Full-service healthcare distributors are the only ones to assume a financing function towards pharmaceutical manufacturers and pharmacies.

- Full-service healthcare distributors guarantee the continuous supply of all medicinal products and also secure the cash flow of social insurers.

- The financing function can be expressed in terms of working capital.

- Full-service healthcare distributors in Europe finance on average **€27.9 bn for 70 days** approximately **5.2 times per year** which equals a total annual volume of **€145 bn.**

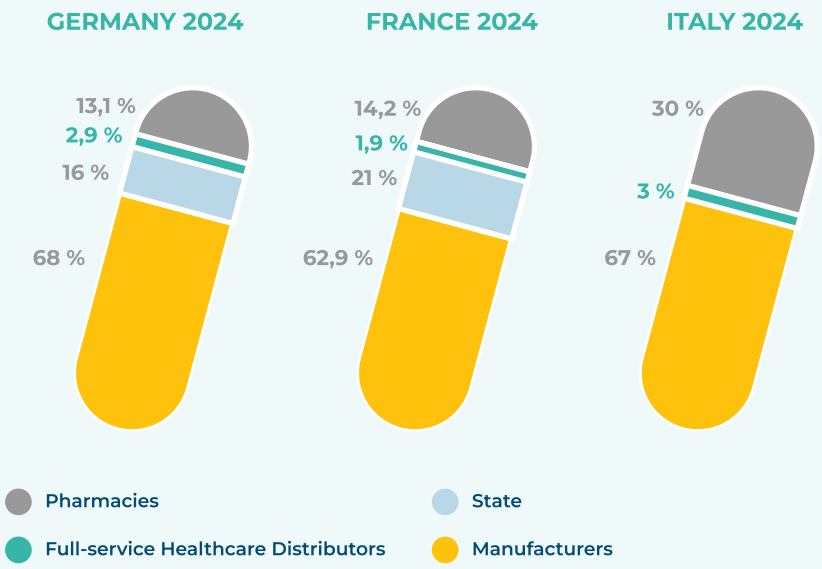


Source: GIRP member data

DID YOU KNOW?

Full-service healthcare distributors in Europe finance on average €27.9 bn for 70 days approximately 5.2 times per year which equals a total annual volume of €145 bn.

Average price composition of reimbursed medicines sold in pharmacies in FR, DE, IT in 2024



Ever increasing compliance costs

In addition to a sector in which prices are highly regulated, full-service healthcare distributors have to face ever-increasing compliance costs. One of the most striking examples of this fact is the compliance costs arising from the Good Distribution Practices Guidelines adopted in 2013. GIRP calculated and mapped the cost of compliance with the Guidelines ahead of the adoption of the latter and assessed the cost borne by full-service healthcare distributors to comply with the requirements.

The total cost in capital investment for the initial compliance amounted to **€709,270,00** in the EU (excluding Malta and Cyprus).

GIRP updated its calculation in 2021 with the latest available figures. In addition to the initial capital investment cost the annual running cost for compliance with the Good Distribution Practice Guidelines in the EU amounts to **€175,219,250**.



05

GIRP DATA PRESENTED BY IQVIA

FINALISATION PENDING

Notes on methodology

- The following section summarizes the main markets for wholesalers in Europe using IQVIA MIDAS data for the full year of 2023 to support the GIRP Annual Report.
- Starting with the traditional market considered the 'everyday reality' for wholesalers in Europe which contains the majority of no longer protected original and generic medicines and are mostly dispensed in the retail channel. Secondly, the specialty market, where medicines are usually dispensed in the hospital setting in lower volumes but have on average higher prices, and finally, the 'niche market medicines' which are a subset of specialty products with ultra-low volumes and largely unique distribution practices. The following data and charts focus on the first two segments.
- Data is provided at country level, and at an aggregated European level, showing value at list prices, volume in pack units or counting units which are required where hospital consumption data does not give the same perspective on the market size, and growth in both the short-term (year-over-year, 2022-2023) and long-term (5-year Compound Annual Growth Rate) where beneficial.

Pharmaceuticals continue on their path to three distinct, co-existing, segments in the industry

Each market segment has its own unique supply chain and service requirements



IQVIA Global Supplier & Association Relations estimations; MIDAS 2024; Rx only; Segments are not mutually exclusive; Niche market is defined as orphan medicines, including medicines with expired orphan status, and the inclusion of orphan medicines that may have multiple indications. A stratified approach has been taken to ensure major orphan medicines with non-orphan indications are estimated to avoid skewing results.

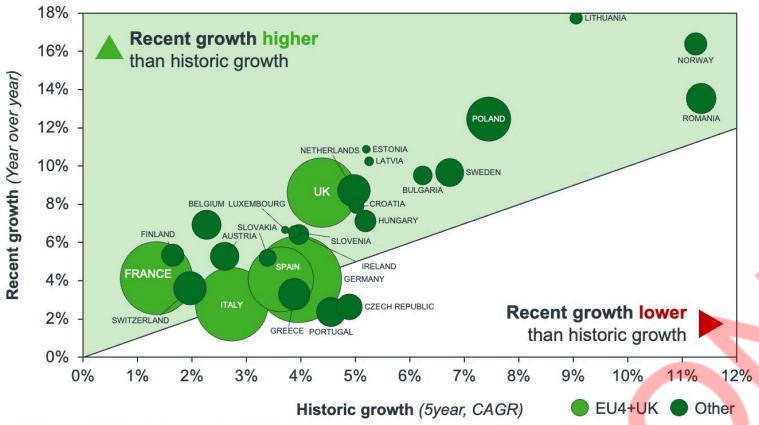


FINALISATION PENDING

Traditional market overview (2023)

Historic country growth rates

Traditional market, hospital and retail combined (value, Euros)



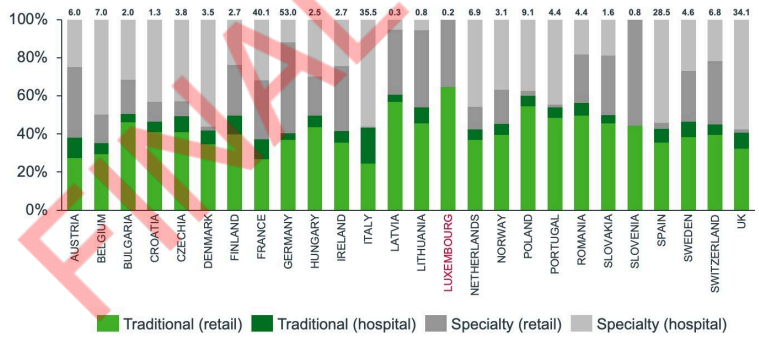
Source: IQVIA Market Prognosis Forecasts Q1 2024 version (Rx only) event-based forecasting methodology
Covers Market Prognosis European markets scope only

Commentary:

- The traditional market is experiencing growth that outpaces historic growth driven by changing priorities from payers.
- Major market growth is not equal, with UK and France growing faster than in the past 5 years.
- Growth at a value level is measured at list prices and does not account for industry paybacks, which occur in many markets to reduce the headline growth figures.

Country overview

Traditional market by sector split (value, Euros)



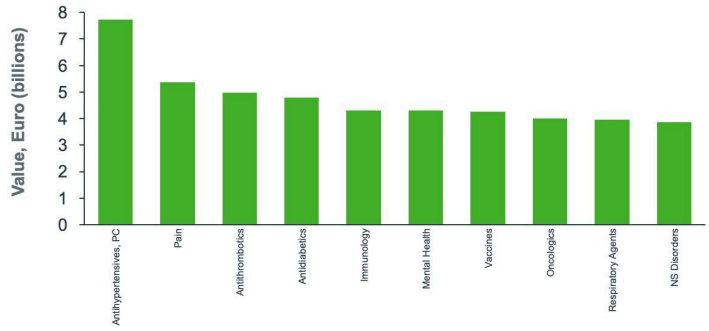
Commentary:

- Focussing on the Traditional medicines dispensed only in the retail channel (light green) represents ~40% of the value in Europe.
- Variability is present in the relative share of traditional medicines in the retail setting, ranging from ~20% to >50% in some cases due to the healthcare system set-up.

FINALISATION PENDING

Top traditional retail therapy areas

(value, Euros)



	Antihypertensives, PC	Pain	Antithrombotics	Antidiabetics	Immunology	Mental Health	Vaccines	Oncologics	Respiratory Agents	NS Disorders
Growth (YoY)	1%	-1%	-1%	-12%	6%	3%	11%	-17%	-3%	-3%
Retail share of total market	96%	69%	100%	100%	100%	100%	100%	100%	100%	100%

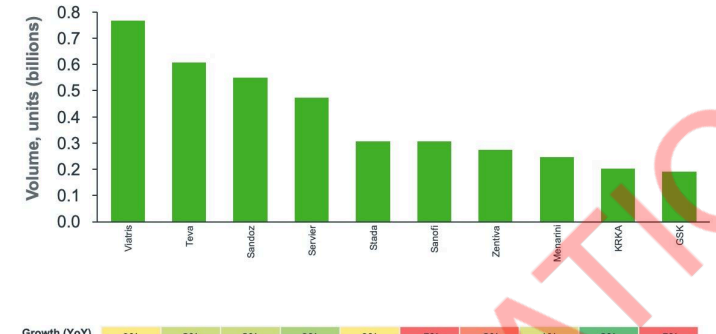
Source: IQVIA MIDAS FY 2022, FY 2023 (Rx only); Traditional=Non specialty, Specialty inferred, Specialty no info. Specialty products were analysed based on MIDAS 'Specialty' grouping. Analysis based on EU27 markets + Norway, UK and Switzerland. PC=Plan & Combo, NS= Nervous system

Commentary:

- Major therapeutic areas for traditional medicines are dominated in value by antihypertensives which are almost entirely dispensed in retail (96%).
- In 2023, traditional medicines for vaccines, immunology, and mental health were the only TAs to show positive growth rates on a value basis.

Top traditional retail manufacturers

Volume (Units)



	Viatris	Teva	Sandoz	Servier	Stada	Sanofi	Zentiva	Menarini	KRKA	GSK
Growth (YoY)	0%	2%	2%	3%	0%	-5%	-2%	1%	8%	-5%
Retail share total portfolio	83%	79%	70%	98%	72%	79%	46%	90%	89%	100%

Source: IQVIA MIDAS FY 2022, FY 2023 (Rx only); Traditional=Non specialty, Specialty inferred, Specialty no info. Specialty products were analysed based on MIDAS 'Specialty' grouping. Analysis based on EU27 markets + Norway, UK and Switzerland.

Commentary:

- Viatris tops the ranking of major traditional medicines manufacturers by volume, followed by Teva and Sandoz.
- In the retail setting, the share of specialty medicines among the top traditional medicines manufacturers is ~10% - 30% by manufacturer showing variable portfolio breadth into other market segments.
- KRKA's 8% growth rate was the highest among the traditional medicines manufacturers with the largest presence (by volume) in the retail setting.

Top traditional retail molecules

Volume (Units)



	Atorvastatin	Metformin	Bisoprolol	Levothyroxine sodium	Omeprazole	Pantoprazole	Amlodipine	Ramipril	Colecalciferol	Paracetamol
Growth (YoY)	7%	1%	3%	1%	-3%	1%	3%	0%	-4%	-6%
Retail share of total market	100%	100%	64%	100%	100%	100%	67%	69%	100%	46%

Source: IQVIA MIDAS FY 2022, FY 2023 (Rx only); Traditional=Non specialty, Specialty inferred, Specialty no info. Specialty products were analysed based on MIDAS 'Specialty' grouping. Analysis based on EU27 markets + Norway, UK and Switzerland.

Commentary:

- In the retail setting, atorvastatin, metformin and bisoprolol are the major molecules in the traditional medicines segment.
- Atrovastatin's 7% growth rate was the highest in the traditional medicines segment in the retail setting.
- Paracetamol, colecalciferol, and omeprazole were the only molecules to see negative growth rates in 2023 likely after COVID-19 spikes in demand subside.

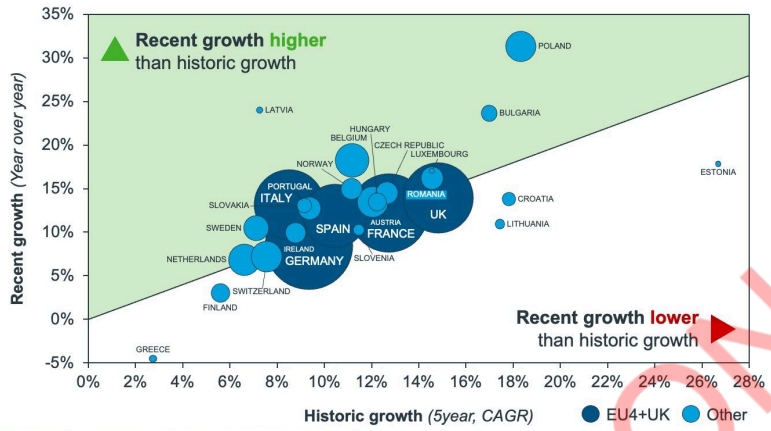
FINALISATION PENDING

Specialty market overview (2023)

FINALISATION PENDING

Historic country growth rates

Speciality market, hospital and retail combined (value, Euros)



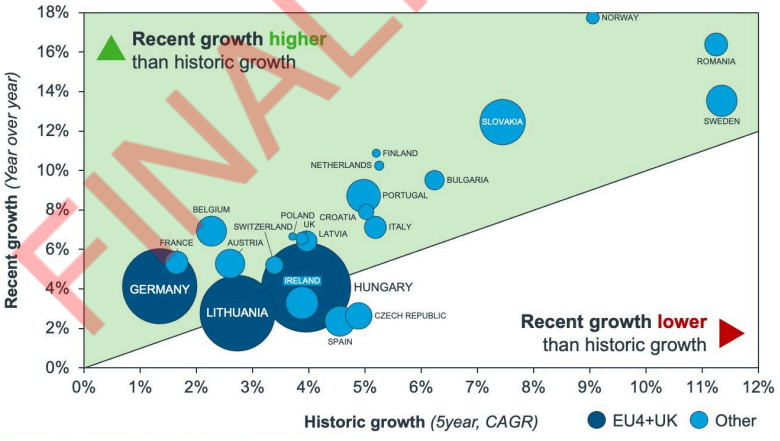
Source: IQVIA Market Prognosis Forecasts Q1 2024 version (Rx only) event-based forecasting methodology
Covers Market Prognosis European markets scope only

Commentary:

- The speciality market is experiencing growth at a higher rate (double-digit growth, ~10%) that outpaces the traditional market (single digit growth, ~2-5%).
- Since increasing proportions of innovative medicines launched are considered specialty medicines, this constitutes the majority of value growth alongside the development of mature brands.
- Growth at a value level is measured at list prices and does not account for industry paybacks, which occur in many markets to reduce the headline growth figures.

Historic country growth rates

Speciality [HOSPITAL] market (SU)



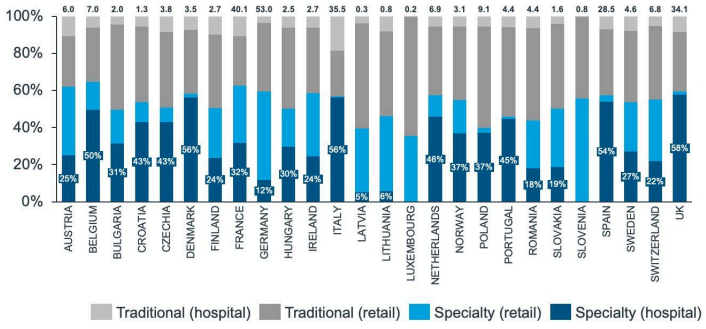
Source: IQVIA Market Prognosis Forecasts Q1 2024 version (Rx only) event-based forecasting methodology
Covers Market Prognosis European markets scope only

Commentary:

- Unit growth in specialty retail is mostly stable, with recent growth exceeding the past 5-year data.
- Growth can come in three main forms from the introduction of novel products, maturation of major specialty molecules with increasing usage or indication expansions, or the volume growth association with biosimilar-led loss of exclusivity.
- Growth rates in standard units are greater than the traditional market volume trends too, although the size of these segments is vastly different (in comparison to the traditional market, the specialty segment is >5% of the size).

Country overview

Specialty market by sector split (value, Euros)



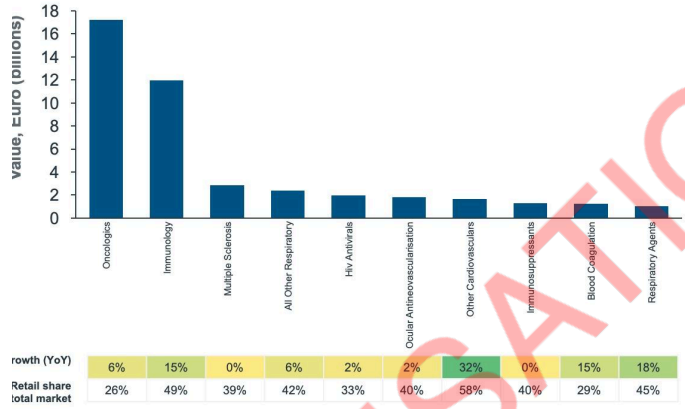
Notes: Analysis is based on IQVIA MIDAS data, markets without hospital panels in IQVIA's MIDAS data were not included (e.g. Greece, Estonia) but can exist at a local level or through alternative estimations.

Commentary:

- Specialty medicines are heavily dispensed in the hospital channel with a few notable exceptions where countries have changed their dispensing systems to facilitate retail-based speciality distribution.
- This chart does not distinguish direct-to-patient care, which is increasingly considered by manufacturers to provide treatment to patients at home.
- Combining the specialty hospital and smaller specialty retail markets, the total market segment accounts for ~50% of the value in Europe (noting the importance of managed entry agreements, and industry paybacks to payers in reducing the real figure).

Top specialty retail therapy areas

(value, Euros)



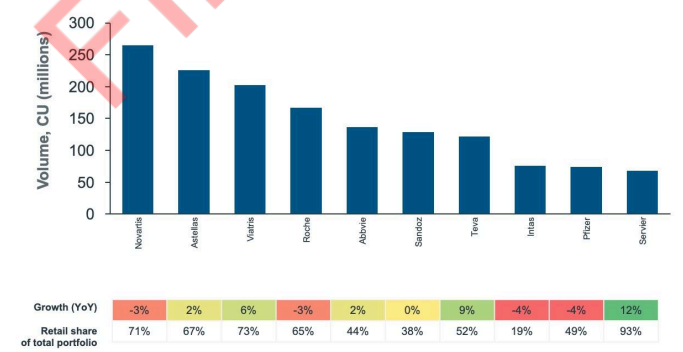
Source: IQVIA MIDAS FY 2022, FY 2023 (Rx only); Specialty products were analysed based on MIDAS 'Specialty' grouping. Traditional=Non specialty, Specialty inferred, Specialty no info. Analysis based on EU27 markets + Norway, UK and Switzerland.

Commentary:

- Oncology and immunology alone represent significant shares of the pharmaceutical market, dominating the top-10 TAs in European markets and have been responsible for the majority of growth in the specialty segment.
- Growth in oncology and immunology have resulted from the innovation and fragmentation in the approach to targeted care.
- The existence of traditional medicines in the retail setting is rarely present, except for respiratory products.
- Expectations are that the obesity therapy area will become one of the major classes in the reimbursed retail market in the coming years and access to the GLP-1 class of therapies expands, supply challenges are resolved, and competition in the space extends further.

Top specialty retail manufacturers

Volume (Counting Units)



Source: IQVIA MIDAS FY 2022, FY 2023 (Rx only); Specialty products were analysed based on MIDAS 'Specialty' grouping. Traditional=Non specialty, Specialty inferred, Specialty no info. Analysis based on EU27 markets + Norway, UK and Switzerland.

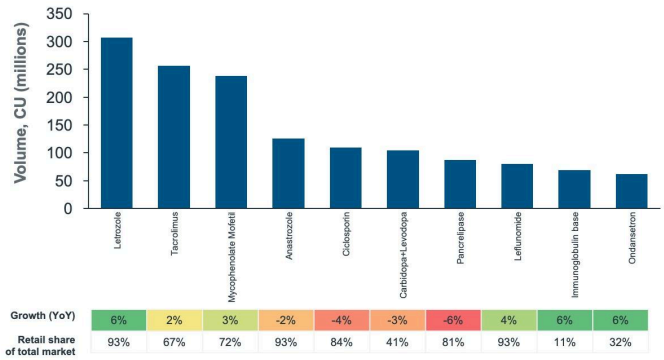
Commentary:

- In absolute terms, 4 of the top-5 manufacturers ranked by volume of speciality medicines in the retail space are innovative manufacturers.
- These companies have large oncology and / or immunology portfolios, however, generic manufacturers Viatris and Teva have seen some of the strongest YoY growth in 2023 for specialty in retail, while also having a large presence of traditional medicines in the retail setting.

FINALISATION PENDING

Top specialty retail molecules

Volume (Counting Units)



Source: IQVIA MIDAS FY 2022, FY 2023 (Rx only); Specialty products were analysed based on MIDAS 'Specialty' grouping. Traditional=Non specialty, Specialty inferred, Specialty no info. Analysis based on EU27 markets + Norway, UK and Switzerland.

Commentary:

- The top molecules by volume in the retail setting have a wide therapeutic range (from oncologics, to transplant rejection medications, and Parkinson's treatments).
- Growth in these mature molecules remains lower compared to the growth seen in the top hospital-dispensed specialty medicines, although volumes are far lower.
- Each of these molecules in the top-10 have a share of their total volume that is dispensed in the hospital setting. This can be due to different administration routes (e.g. oral and IV doses available) but mostly reflects the variable nature of systems in the European ecosystem and their choices.
- Therefore, wholesalers may only be accessing a proportion of a molecule's true volume potential.

FINALISATION PENDING

06 MEMBERS & SPONSORS

GIRP Board

2023 - 2025 Mandate



Bernd Grabner
President
GIRP



Rui Carrington
Member of the Board
ADIFA



Thomas Porstner
General Manager/
Head Counsel
PHAGRO



Antal Feller
Treasurer
CEO
Hungaropharma



Emmanuel Déchin
Secretary General
CSRP



Sven Seidel
CEO
PHOENIX Group



Katerina Gabrielson
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Meet the 2024 GIRP Team



Kasper Ernest
Director General (incoming)



Pauline Foucher
Executive Director,
External Affairs



Clare Birmingham
Senior Manager,
Communication and
Public Affairs



Maria Zazula
Events & Administration
Manager



Orla Finnerty
Legal Affairs Manager



Hugo Lecuyer
European Affairs Trainee



Maria Coronada Rodriguez Medina
European Affairs Trainee



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GIRP Members

AUSTRIA
PHAGO Verband der Österreichischen Arzneimittelvollgroßhändler

BELGIUM
NVGV – ANGR Association Nationale des GrossistesRépartiteurs en Spécialités Pharmaceutiques

BULGARIA
BATEL Bulgarian Association of Pharmaceutical Wholesalers

CROATIA
PHOENIX Farmacija, Medika, Oktal Pharma, Medical Intertrade

CZECH REPUBLIC
AVEL Asociace velkodistributorů léčiv Czech Association of Full line Wholesalers

DENMARK
MEGROS Foreningen af medecingrossister Danish Association of Pharmaceutical Wholesalers

ESTONIA
ERHL Estonian Association of Pharmaceutical Wholesalers

FINLAND
Tamro Oyj Finland

FRANCE
CSRP Chambre Syndicale de la Répartition Pharmaceutique

GERMANY
PHAGRO Bundesverband des pharmazeutischen Grosshandels

GREECE
PAPW Panhellenic Association of Pharmaceutical Wholesalers and Qualified Pharmacists

HUNGARY
HAPW Hungarian Association of Pharmaceutical Wholesalers

IRELAND
PDF Pharmaceutical Distributors Federation

ITALY
ADF Associazione Distributori Farmaceutici

LATVIA
LZLA Latvian Association of Pharmaceutical Wholesalers

LUXEMBOURG
HANFF - Global Health Solutions

NETHERLANDS
BG Pharma

NORWAY
NAPW Norwegian Association of Pharmaceutical Wholesalers

POLAND
Pelion

PORTUGAL
ADIFA Associação de Distribuidores Farmaceuticos GROQUIFAR Associação de Grossistas de Produtos Químicos e Farmacêuticos

ROMANIA
ADRFR Asociatia Distribuitorilor si Retailerilor Farmaceutici din Romania

SERBIA
Serbian Chamber of Commerce - Group of Pharmaceutical Wholesalers

SLOVENIA
TZS Slovenian Chamber of Commerce, Pharmaceutical Full–line Wholesalers

SLOVAKIA
AVEL Asociácia veľkodistribútorov liekov Association of Medicines Distributors

SPAIN
FEDIFAR Federación Nacional de Asociaciones de Mayoristas Distribuidores de Especialidades Farmacéuticas y Productos Parafarmacéuticas

SWEDEN
LDF Läkemedelsdistributörsföreningen Swedish Association of Pharmaceutical Wholesalers

SWITZERLAND
Pharmalog.ch Swiss pharma logistics association

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Alliance Healthcare – Bringing healthcare closer
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HPH Hungaropharma
NOWEDA – Die Apothekergenossenschaft
Oriola
PHARMA PRIVAT – Näher dran. Weiter vorn.
PHOENIX group
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HDA UK
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中国医药商业协会 CHINA ASSOCIATION OF PHARMACEUTICAL COMMERCE
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Healthcare Value Chain Network

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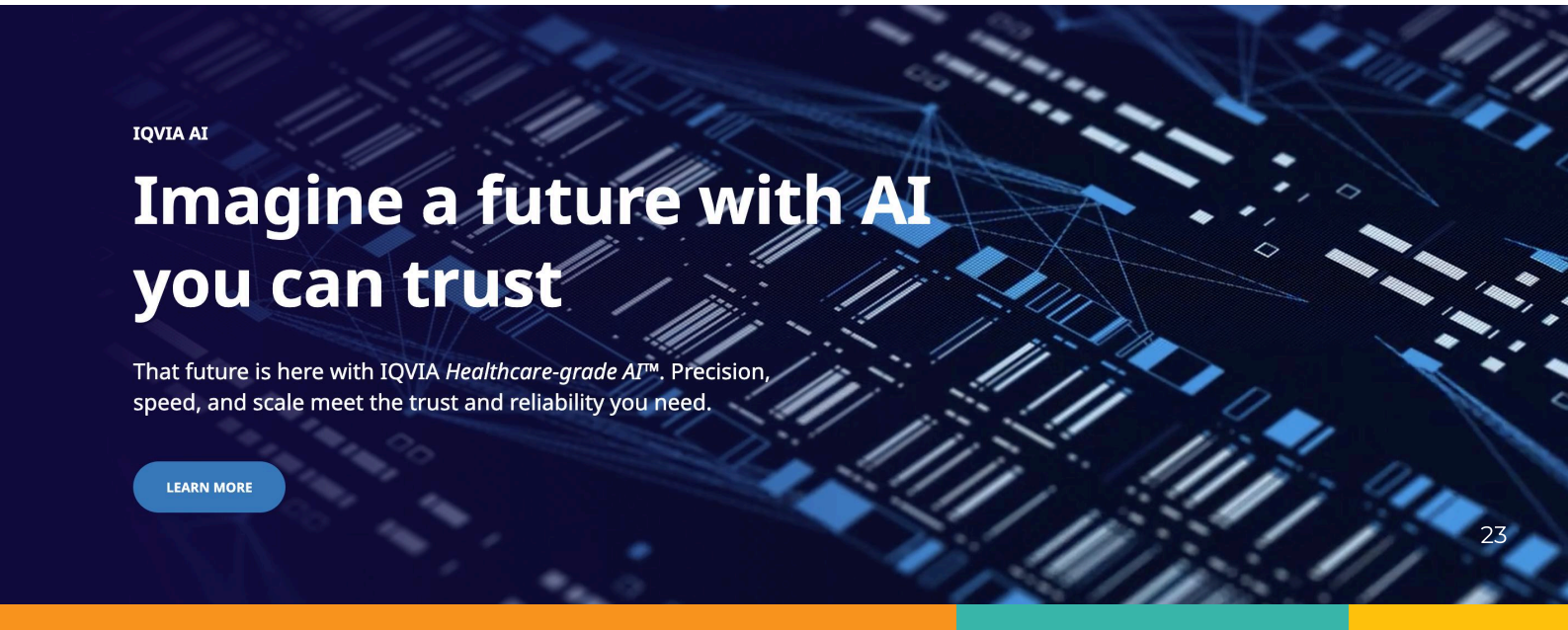
GIRP Sponsor - IQVIA

Shortages in Europe remain a challenge. In December 2023, the European Commission published a list of molecules designated as 'critical'. Analysis by IQVIA, a leading global provider of advanced analytics, technology solutions and clinical research services to the life sciences industry, suggests that the 249 molecules in the published list represent 20% of all European shortages in the last 12 months.

Antibiotic shortages, which were prevalent at the end of 2023, have decreased. Now, treatments for attention deficit disorder and all glucagon-like peptide 1 agonists are increasingly experiencing shortages across multiple markets. The evolving landscape underscores the importance of anticipating which areas will emerge, peak and stabilize.

The IQVIA Shortages Transparency Platform continues to monitor the situation across Europe and help stakeholders in their resolution strategies. The platform provides a comprehensive view of shortages based on 23 official shortage registries published by European national competent authorities and IQVIA's proprietary internationalization linkage and consumption data.

Simon Tottman
Vice President
Global Strategic Partners
IQVIA



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BD Rowa™ stands for smart intralogistics solutions for automated storage and order fulfilment, which will optimize your processes even more. The flexible automation solutions are suitable for a wide range of warehouse sizes and process workflows. At its headquarters in Germany, the company develops and manufactures its reliable solutions – worldwide, more than 13,000 automated solutions are implemented.

With BD Rowa™, you can easily step into a secure and digitally connected future. The right technologies and innovative concepts can make your facility future-proof. The focus is on holistic system integration specialized in identifying, storing and dispensing single products. When dealing with pharmaceutical distribution centers, BD Rowa™ focuses on automating slow and medium movers, returned items and cold storage goods. Collaborating with our partner SSI Schäfer for more than 9 years, we provide tailor-fit and holistic solutions which are fully scalable and offer the advantage of growing with your requirements.

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robopharma®
Automation by Capsa Healthcare

RoboPharma – A Completely Unique Approach

In our highly dynamic landscape, efficiency and precision are paramount. Central fill operations are transforming pharmaceutical wholesaling by centralizing medication dispensing into hubs that fill, package, and distribute prescriptions with unmatched efficiency. This approach optimizes resource utilization and ensures adherence to quality standards and regulatory requirements, while reducing costs associated with inventory management, labor, and transportation.

RoboPharma, a pioneer since launching Europe's first central fill operation in 2006, designs innovative solutions blending technical ingenuity with operational excellence. Our custom automation technology, including robotics and advanced software, enhances efficiency, accuracy, and throughput, freeing skilled personnel to focus on quality assurance and customer support.

Central fill operations – when designed correctly – empower wholesalers to adapt to e-commerce and omni-channel distribution trends, integrating seamlessly with existing infrastructure to scale operations efficiently and ultimately enhance your customers' experience. For wholesalers ready to boost efficiency and precision, RoboPharma is your strategic technology partner. **www.RoboPharma.com**



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GIRP Sponsor - THERMO KING

THERMO KING

Refrigeration's essential role in the pharmaceutical supply chain remains unquestionable. Pharmaceutical products require a dependable, unbroken cold chain at all stages, often necessitating strict, extreme storage temperatures. Rising demand highlights sustainability. Logistics companies comply with GDP and other regulations while considering the impact on their goals and carbon footprint. Refrigerated containers provide a sustainable alternative to air freight, transporting Active Pharmaceutical Ingredients (APIs) and final products at -70°C.

Electrification of transport refrigeration is crucial for decarbonizing commercial transport. Electric refrigeration technology ensures quick temperature recovery after door openings due to advanced power electronics, reducing emissions and allowing energy recovery, especially in last-mile deliveries. Maintaining cold chain integrity is crucial, regardless of transport mode. Today's sensors, data logging, and telematics document that valuable cargo is transported according to requirements. Telematics offers real-time monitoring and tracking of vehicles, goods, and equipment, safeguarding product efficacy and integrity effectively.



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GIRP Sponsor - INSIGHT HEALTH

Better data – better insights – better decisions!

As a leading service provider in market and healthcare research and data analysis, Insight Health stands as a competent partner with unparalleled databases, customized solutions, and exceptionally high standards of quality. We support our clients from data analysis to deriving insights through our intuitive analysis tools and tailor-made BI dashboards.

Insight Health positions itself as more than just a data provider. We regard data as the foundation for strategic endeavors. We offer reliable data on the pharmaceutical market and assist our clients in selecting the right data from vast datasets, utilizing it to gain valuable business insights. We analyze their queries, deliver data-driven insights, and help them achieve optimal outcomes. We look BEYOND DATA.

We look forward to continuing our support for GIRP and its members. For more information, visit: **www.insight-health.de**



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GIRP Sponsor - THERMO KING

CAPPI
PACKAGING FOR LOGISTICS

CAPPI first started out in the design and manufacturing of plastic shipping totes dedicated to pharmaceutical wholesalers. Driven by innovation, CAPPI invests in the development and testing of customized packaging for the transport of temperature- controlled products year-on-year. A leading company in the French market, CAPPI continues its international growth in three strategic markets: pharmaceutical manufacturers, pharmaceutical wholesalers and the food industry.

CAPPI meets demands from all across the pharmaceutical supply chain, from manufacturer to wholesaler and from wholesaler to pharmacy. Our range of plastic shipping totes for pharmaceutical wholesalers are designed and tested to integrate automated order preparation processes. Equipped with a qualified, isothermal protection inlay to respect any temperature range during transport: guaranteed to satisfy all mechanical and thermal needs.





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EUROPEAN HEALTHCARE DISTRIBUTION ASSOCIATION

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