

Community Pharmacy in Australia

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Program

- Outline of the Australian healthcare and pharmaceutical Environment
- Community pharmacy's role within the Australian system
- Types of pharmacy banners
- Merchandising categories in community pharmacies
- Professional services through community pharmacies
- Pharmacy automation

Australian Healthcare and Pharmaceutical Environment

- \$87 billion (9% GDP)
- A\$4226 per person
- 70% public 30% private
- Annual growth 5%
- Life expectancy 78.7 / 83.5 years
- Commonwealth, State, Local governments

Health Professionals

- 7% of work force (743,800)
- 16,300 pharmacists
- 5,000 pharmacies
- 300 hospital pharmacy departments
- National Registration and Accreditation Scheme (NRAS) 2010

Commonwealth Government

- The Australian Constitution
- National Health Act 1953 – NHS, MBS, PBS
- Therapeutics Goods Act 1989 - TGA
- Quarantine Act 1908

State Government

- Registration (until 2009)
- Drugs and Poisons
- Public Health
- Standard for the Uniform Scheduling of Drugs and Poisons (SUSDP)
- Pharmacy Board – premises license

Schedule 1	Special Poison	DR, Pharmacisits, Veterinary Surgeons
Schedule 2	Pharmacy Medicine	Pharmacy only
Schedule 3	Pharmacist only Medicine	Pharmacists, Dr, Dentists, Vet Surgeons
Schedule 4	Prescriptions only	Dr, Dentists, Vet Surgeons, approved health professionals
Schedule 5	Caution	
Schedule 6	Poison	
Schedule 7	Dangerous Poison	Special precaution
Schedule 8	Controlled Drugs	Drugs of Addiction
Schedule 9	Prohibited Substance	Medical or scientific research, approval

Pharmaceutical Benefits Scheme

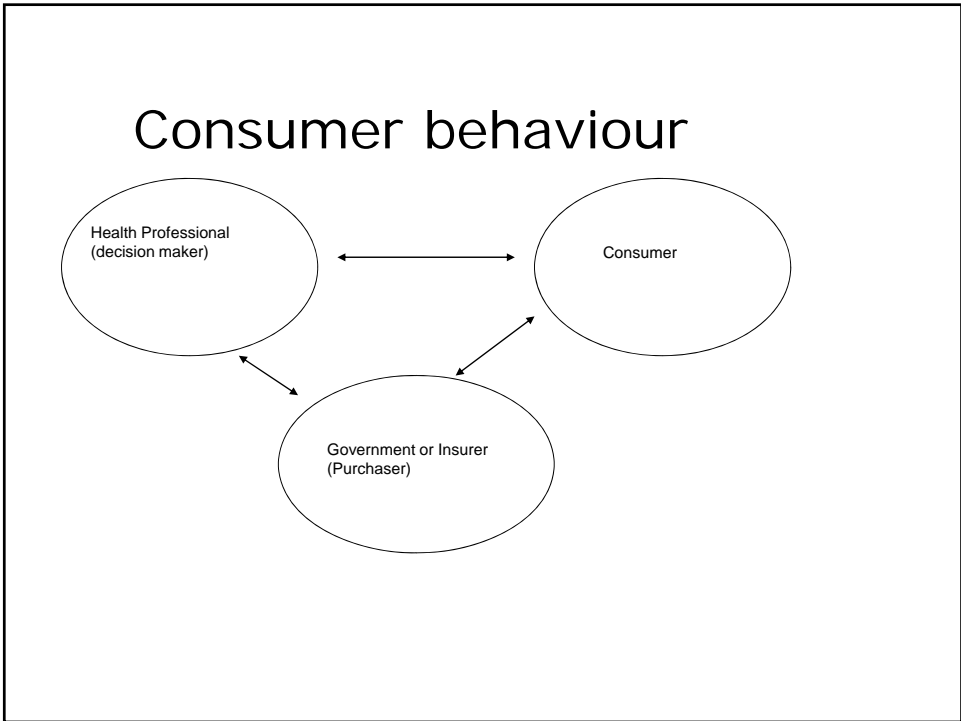
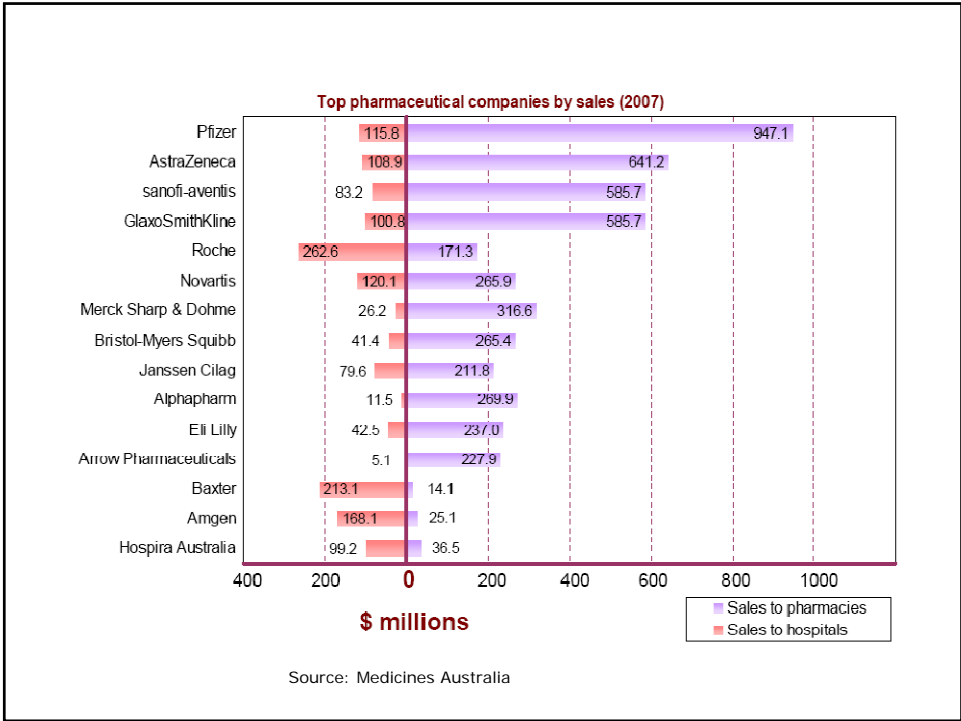
- \$6 billion
- PBS listing
- Reference pricing
- 12.5% generic price reduction
- Co-payment
- Safety net

Impact of regulations

- Pharmacy ownership
- PBS location rules
- PBS listing and pricing to manufacturers, wholesalers, community pharmacies and hospital pharmacy departments

Pharmaceutical Industry

- 300 companies, 34,000 employees
- A\$17 billion (\$3.9 billion export)
- Over 50% via PBS
- R&D
- Pharmaceutical Partnership Program (P3)
- Medicines Australia Code of Conduct



Community Pharmacy

- Community (Retail) Pharmacy 5000
 - Banner
 - Friendly Society
 - Group
 - Independent
- Hospital Pharmacy 300
 - Public Hospital Pharmacy Department
 - Private Hospital Pharmacy Department
 - Community Pharmacy servicing private hospitals
 - Community Pharmacy servicing public hospitals



Friendly Society Pharmacy



- Not for profit organisations
- Exemption on pharmacist ownership of pharmacies
- Exemption on pharmacy ownership cap
- Taxation advantage

Group Pharmacy

- Private pharmacists ownership
- Group corporate structure
- Pharmacy ownership rules applicable



Bulk & Direct online Sales



Merchandising categories in community pharmacies

Category	Market Share
Vitamin and mineral supplements	11.2%
Cosmetics	9.5%
Analgesics	7.6%
Cough and Cold	6.2%
Skin Care, Cosmetic	4.2%
Skin Care, therapeutic	4.1%
Gastro-intestinal	3.8%
Allergy & hayfever	3.3%
Baby	3.1%
Hair care	2.7%

Self Care Industry

- \$4 billion
- 50% sought pharmacists advice
- \$21 per month
- 39% Vitamins
- 21% herbal medicines
- 14% mineral supplements
- 11% aromatherapy







Other Categories

- Health information
- Diagnostic services
- Weight Management Program
- Smoke cessation
- Compounding
- Photographs

Professional Services

- Dose Administration Aid Program (DAA)
- Patient Medication Profiling Program (PMP)
- Diabetes Medication Assistance Service (DMAS)
- Pharmacy Asthma Management Service (PAMS)

Automation

- Unit-dose packing system
- Imprest/stock control system
- Picking system
- Remote dispensing system

Organisations

- Pharmaceutical Society of Australia
- Pharmacy Guild of Australia
- Victorian College of Pharmacy
(Faculty of Pharmacy and
Pharmaceutical Sciences, Monash
University)