

THE AUSTRALIAN PHARMACEUTICAL SCENE

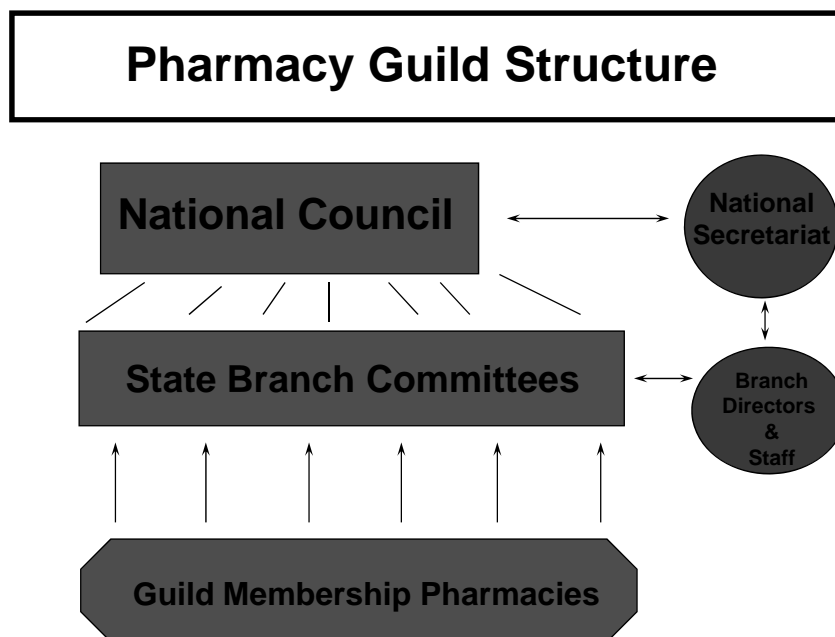


Mr Bill Scott,
Director of Sigma Pharmaceuticals,
Chairman of FRED IT,
Chairman on Healthlinks,
Melbourne
11 November 2009

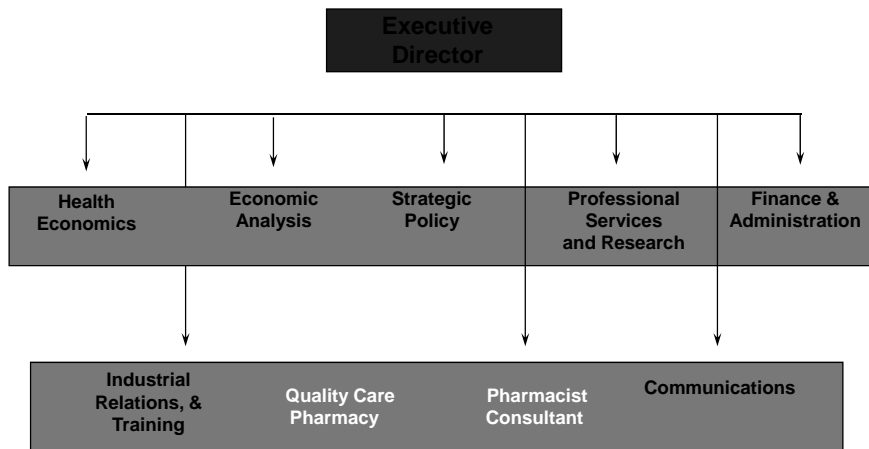
- Introduction to Pharmacy Guild of Australia
- Short View of Australian Pharmaceutical Scene.
- Social and Economic Pressures on Pharmaceutical Costs
- Role of the Australian Government
- My Own Pharmacy Experience Amcal Max, Amcal, Guardian, Fulllife Pharmacies.
- Prescription Drug Opportunities.
- Health Care Opportunities. Immunization, Diabetes Care, Compounding etc
- Over the Counter Medicines
- General Retail Sales

The Pharmacy Guild

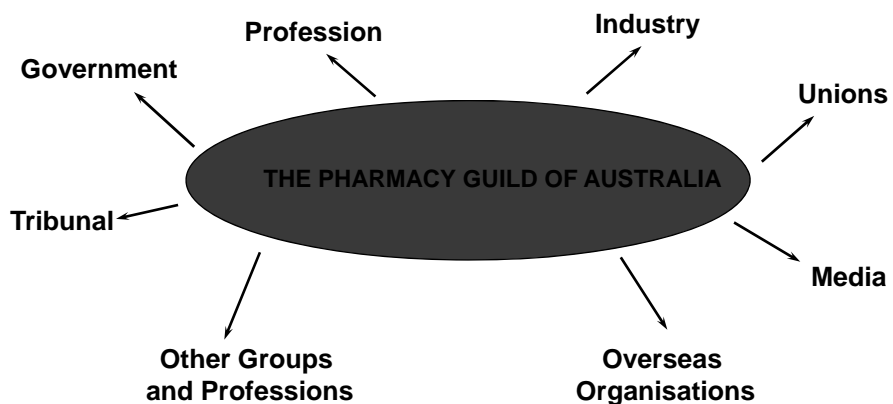
- Formed in 1928
- Registered under the federal Workplace Relations Act 1996 as an employers' organisation
- Single legal entity with State/Territory Branches
- Members are owners of community pharmacies throughout Australia
- National Council responsible for policy development
- Policy implementation by National Secretariat in Canberra and State/ Territory Branches



National Secretariat - Organisation Chart



Contacts - Influence/Lobbying



Major Activities

- Five year Agreements with Government
 - * Remuneration, Rural and Professional Programs, and Location Rules
- Range of programs and services for members
 - * Agreement Programs
 - * Wide ranging member support and advice
- Promoting and Enhancing the role of community pharmacy in the health sector
 - * Lobbying and political representation
 - * Submissions, papers and publicity
 - * Quality Care Pharmacy program



Pharmacy Finances

- Heavy reliance on dispensary income
- Major costs are salaries and rent
- Business Summary
 - * Average turnover \$2.5m
 - * 70:30 dispensary to front of shop
 - * 50,000 Rx dispensed per year
 - * 950 Rx dispensed per week



The Pharmacy
Guild of Australia

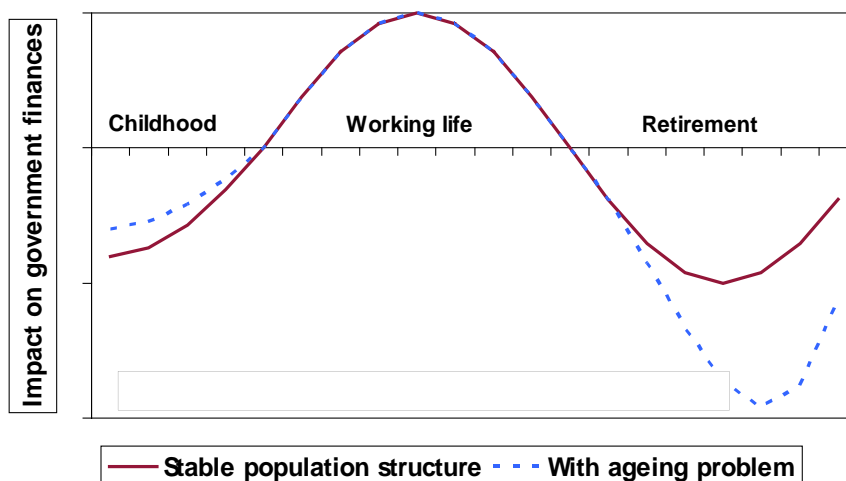
Share of Global Market (Sales)



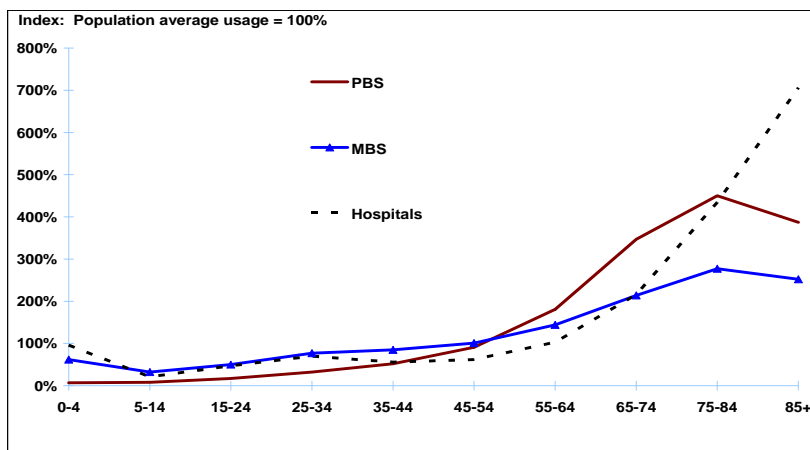
Top Ten Brands by Global Pharmaceutical Sales (2005)

Rank	Brand (molecule)	Indication	Company	Global sales (US\$ billion)	Share (%)
1.	Lipitor (atorvastatin)	High cholesterol	Pfizer	12.9	2.3
2.	Plavix (clopidogrel)	Blood clots	sanofi-aventis/Bristol Myers-Squibb	5.9	1.0
3.	Nexium (esomeprazole)	Stomach ulcers	AstraZeneca	5.7	1.0
4.	Seretide/Advair (fluticasone and salmeterol)	Asthma and COPD*	GlaxoSmithKline	5.6	1.0
5.	Zocor (Simvastatin)	High cholesterol	Merck	5.3	0.9
6.	Norvasc (amlodipine)	High blood pressure	Pfizer	5.0	0.9
7.	Zyprexa (olanzapine)	Schizophrenia	Eli Lilly	4.7	0.8
8.	Risperdal (risperidone)	Schizophrenia	Janssen	4.0	0.7
9.	Ogastro/Prevacid (lansoprazole)	Stomach ulcers	Abbott	4.0	0.7
10.	Effexor (venlafaxine)	Depression	Wyeth	3.8	0.7

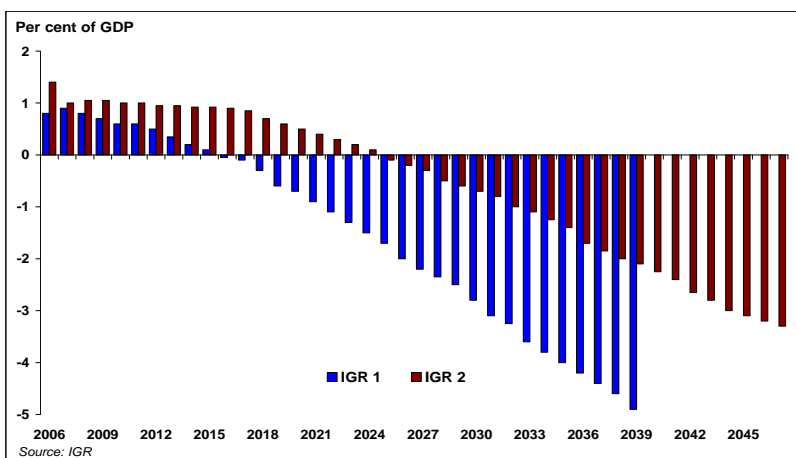
The changing intergenerational compact



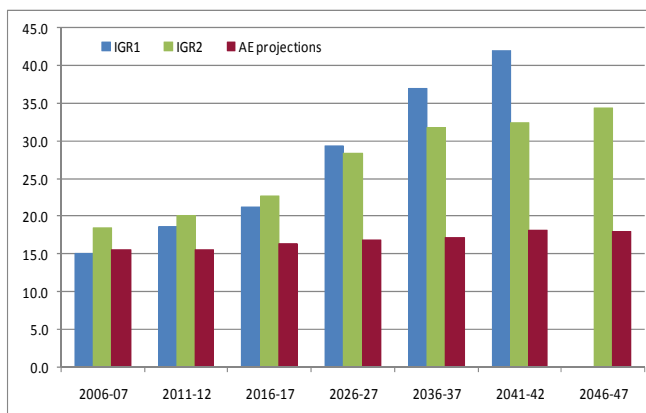
Relative use of health services, by age



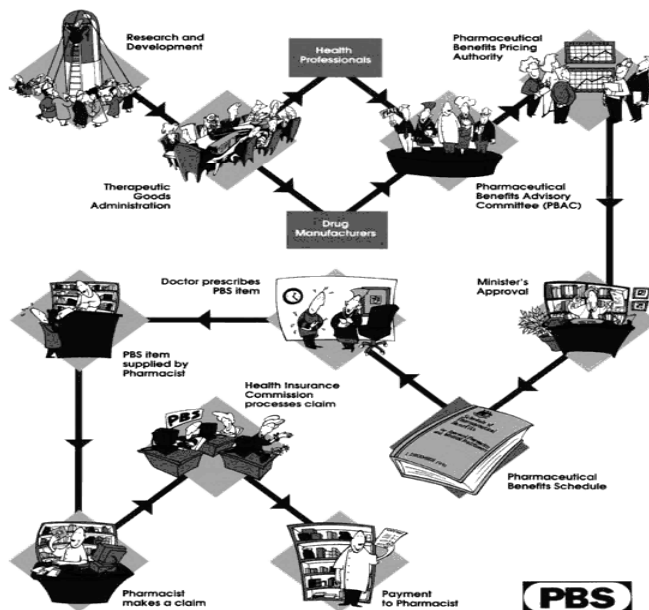
IGR 1 versus IGR2 budget projections



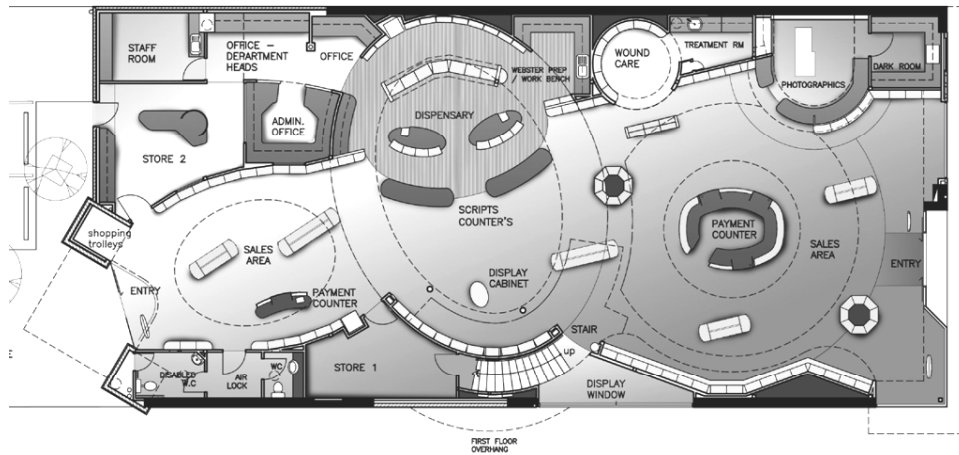
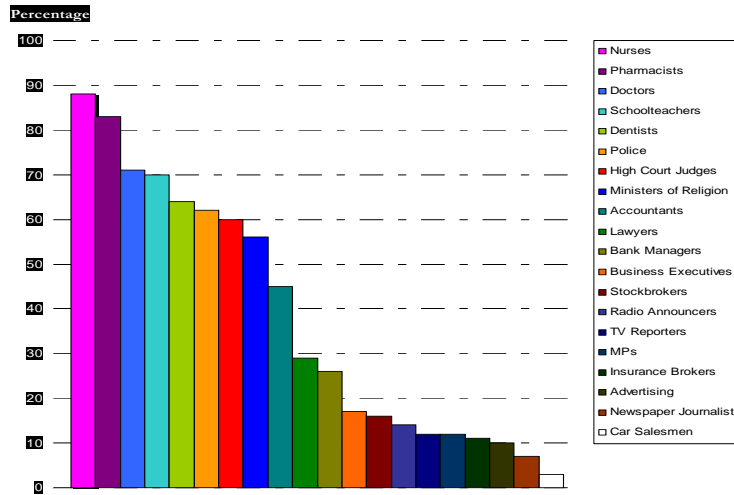
PBS share of Federal health spending (% of total health spending)



The Birth of a Pharmaceutical Benefit



Occupations Rated for Ethics and Honesty in Australia



Prescription Drug Opportunities

- ePrescribing
- Meds Index
- Mirixa
- Adherence Programs
- Aged Care Pharmaceuticals

The screenshot displays the MirixaPro web application interface within a Mozilla Firefox browser. The page title is "Documentation - Mozilla Firefox" and the URL is "https://training.mirixa.com/MirixaPro/cases/details/Documentation.aspx?caseId=5710". The user is logged in as "Kos Sclavos" at "Aaron's Pharmacy".

The main content area shows "Case 5710 Detail | Seretide Compliance Program (Session #2)". The patient information is: "Patient: Anderson, Karen (F) | DOB: 12/9/1948 (60 yrs) | PH: (510) 555-1212". The "Documentation" tab is active, showing a form for "Seretide MDI 125/25".

The form includes the following fields:

- Medicine Name: Seretide MDI 125/25
- Date of earliest supply: 5/6/2009
- Date of latest supply: 14/9/2009
- Number of supplies in this reference period: 2
- Quantity per script: 120
- Total daily dose: 4

There are two sections for documentation:

- 1. Compliance Review**
 - Reviewed knowledge assessment:
 - Reviewed compliance since previous session:
- 2. Non-compliance behaviour interview**
 - Barriers to compliance: Check all that apply.
 - Knowledge
 - Convenience
 - Cost
 - Attitude
 - Social Support
 - Fear
 - Beliefs
 - Memory
 - Side Effects

On the right side, there is a "3. MedsIndex" section. It explains that MedsIndex measures compliance using repeat dates compared to the number prescribed. The "Qualifying Score" is 63, and the "Current Score" is 89. The "Improvement" is 26 points. The "Goal" is 95. A bar chart shows the score relative to a scale from 50 to 100, with the current score at 89. The text says "You're almost there" and "Room to improve Time to act".

At the bottom, there is a "Desired Benefits" section with the text: "Be able to exercise more often without difficulty".

Documentation - Mozilla Firefox

File Edit View History Bookmarks Tools Help

https://training.mirixa.com/MirixaPro/cases/details/Documentation.aspx?caseId=5710

Most Visited Getting Started Latest Headlines

4. Asthma Score Assessment

In the past 4 weeks, how often did your asthma prevent you from getting as much done at work, school or home?

All of the time Most of the time Some of the time A little of the time Not at all of the time

During the past 4 weeks, how often have you had shortness of breath?

More than once a day Once a day 3 to 6 times a week Once or twice a week Not at all

During the past 4 weeks, how often did your asthma symptoms (wheezing, coughing, shortness of breath, chest tightness or pain) wake you up at night or earlier than usual in the morning?

4 or more times a week 2 to 3 nights a week 1 night a week Less than 1 night a week Not at all

During the past 4 weeks, how often have you used your blue puffer or reliever medication (such as Ventolin, Asmol, Aironir, Epaq, Bricanyl)?

3 or more times a day 1 or 2 times per day 2 or 3 times per week Once a week or less Not at all

How would you rate your asthma control during the past 4 weeks?

Not controlled at all Poorly controlled Somewhat controlled Well controlled Completely controlled

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Asthma Score

The Asthma Score measures a patient's level of asthma control, based on responses to the five questions in the Asthma Score Assessment. A score of 25 suggests excellent asthma control.

Current Score: 22

What this score means:

On target. Your asthma may be WELL CONTROLLED but not totally controlled. Your asthma control could be optimised – talk to your pharmacist.

5. Pharmacist Summary

Well done! You've made a nice improvement in your MedIndex score since our last visit. I'm glad you've set an even higher target - that will help you achieve your goal of breathing easier and exercising more. Remember the techniques we discussed, such as placing your medicines next to your toothbrush, and refer back to your CMI handout any time you feel confused. I'm here to help as well.

Provided printed session summary and handout

Schedule the patient's next session at a convenient time 24 weeks following completion of Session 1.

Date: 14/12/2009

Time: 11:00 AM PM

Press SAVE to calculate scores.

Done training.mirixa.com

start Documentation - Moz... 100% 6:38 PM

Healthcare Opportunities

- Immunisation
- Diabetes Care
- Pharmaceutical Compounding
- Medication Therapy Management
 - In the Pharmacy
 - In the Home
 - In the Health System

Over the Counter Medicines

- Pharmacist Only Medicines
- Pharmacy Only Medicines

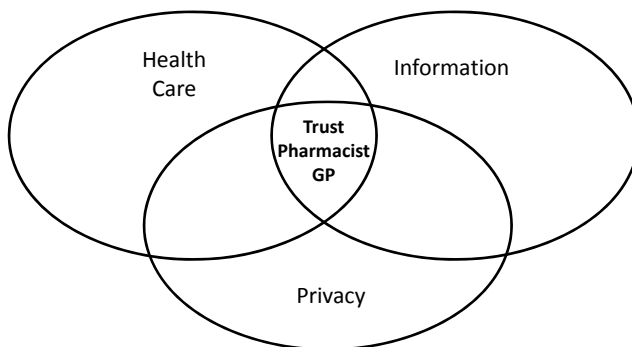
The critical role of pharmacists professional input in the proper use of these medicines and the enormous economic opportunity

General Retail Sales

- Cosmetics
- Beauty Care
- Vitamins
- Traditional Health Remedies
- Baby Care
- Wound Care
- Medical Aids
- Health shoes
- Photographics
- Toys etc

Future

- Universal Medication Record
- Infomediaries



"Healthcare in Pharmacy 2008"

“It is not the strongest species that survives or the most intelligent species but the species most adaptable to change”

Charles Darwin