

Celesio Policy Position

Our Vision for Community Pharmacy in the Future

Annex – Facts and Figures

1. The EU's public health challenges

- **The population is ageing.** The proportion of the EU's population aged 65+ is projected to grow from 18.5% in 2014 to 23.9% by 2030 and 28.1% by 2050. ¹
- **The burden of chronic diseases is rising.** In 2013 the European Commission estimated that chronic diseases affect over 80% of Europeans over 65 and are responsible for 86% of all deaths. ²
- **Public healthcare expenditure is reaching its limits.** From 2000-2009, the average annual growth in healthcare expenditure in real terms across the EU was 4.7%; from 2009-2012, the change was -0.6%. ³
- **The number of healthcare professionals is declining.** In 2012, the European Commission estimated that there would be a total shortage of nearly 1 million across the EU by 2020, including 230,000 physicians. ⁴

2. Examples of expanded community pharmacy services

- **Offering first-line medical advice:** Pharmacists can deliver minor/common ailment schemes, displacing consultations away from GPs and freeing up their capacity; in the UK, it is estimated that this could save 57 million GP consultations annually.
- **Improving patient adherence:** A Spanish pilot study for the ADHIÉRETE programme in 2009-2010 of polymedicated patients over 60 found that pharmacist intervention improved adherence from 41.2% to 70.6%. ⁵
- **Disease prevention:** A Community Pharmacy Future study in the UK among 238 screened for Chronic Obstructive Pulmonary Disease (COPD) found that 135 were at risk of having the disease, and with related smoking cessation and lifestyle advice, the study estimated a cost saving per patient screened at £392.67. ⁶

¹ Eurostat, Population structure by major age groups, EU-28, 2014–80

http://ec.europa.eu/eurostat/statistics-explained/index.php/File:Population_structure_by_major_age

² Reflection Process on Chronic Diseases – Final Report, October 2013

http://ec.europa.eu/health/major_chronic_diseases/docs/reflection_process_cd_final_report_en.pdf

³ OECD Health Statistics 2014

<http://dx.doi.org/10.1787/health-data-en>

⁴ Commission Staff Working Document on an Action Plan for the EU Health Workforce. SWD (2012) 93 final.

http://ec.europa.eu/health/workforce/docs/staff_working_doc_healthcare_workforce_en.pdf

⁵ CGCOF. Project. Pilot study on the Implementation of a Pharmaceutical Care Service for Dependent Patients. PAM. 2011;341:151-8

⁶ David Wright *et al.* Chronic obstructive pulmonary disease case finding by community pharmacists: a potential cost-effective public health intervention. International Journal of Pharmacy Practice, Volume 23, Issue 1, pages 83-85, February 2015

- **Condition management:**
 - ➔ A German study in 2005 of Self-Monitoring of Blood Glucose by type-two diabetes patients showed that instruction by community pharmacies could lead to a fall in the average number of mistakes per administration per patient from 3.1 to 0.8.⁷
 - ➔ In Norway, community pharmacies, including Celesio's Vitusapotek, have offered an inhaler checking service for asthmatics since 1 March 2016, which has proved to be very popular.
- **Public health awareness campaigns:** In the UK for example, these have included interventions on alcohol consumption and sexual health advisory services. In Italy, they have covered diabetes, HIV-AIDS and smoking.
- **Medication programmes:** Community pharmacies in Ireland, Portugal, Switzerland and the UK already administer seasonal flu vaccinations. In Ireland, 10% of patients were vaccinated in this way in winter 2014-2015. In the UK, 300,000 patients received vaccination in a pharmacy during the first 30 days of 2015 flu season.⁸
- **Updating electronic patient records:** In Germany, the Bundestag adopted legislation late in 2015 to develop an electronic health record, to be ready from late 2018: pharmacists will have the right to add data with the permission of the patient. Celesio would strongly encourage policy makers to facilitate better access to consolidated patient health records.
- **Health corners:** In Italy, Celesio's pharmacies provide a Health Corner in which they offer diagnostic tests, e.g. for cholesterol, glycaemia, through means such as on blood tests, electrocardiogram, Holter monitor or spirometry. They also provide a working place in a pharmacy for a hospital attendant to do injections and dressings and a physiotherapist to offer rehabilitation services.

For further examples of the services that community pharmacies can offer, please see the 2015 Annual Report of the **Pharmacists Group of the European Union (PGEU)**, *Pharmacy with you throughout life*.⁹

3. Political support

- **EU:** An expanded role for pharmacists was endorsed in an independent report¹⁰ for the European Commission on promoting self-care, which called for: *'a change in the definition of pharmacists, expanding from a "dispenser" to an integrated health care professional offering counselling, advices and new pharmacy services'*.
- **EU:** Similarly, the European Commission-appointed independent Expert Panel on Effective Ways of Investing in Health recently adopted an Opinion¹¹ which states:
 - ➔ *'Consideration should also be given to possible obstacles to any health profession developing new skills and tasks. For example, a greater involvement of a highly trained, skilled and underutilised workforce of pharmacists across Europe could be a disruptive innovation in health care – providing*

⁷ Müller et al. *Evaluation der Durchführung von Glukoseselbstkontrollen in Apotheken (EGDAr)*. Diabetes, Stoffwechsel und Herz, 4/2006, pages 9-17

⁸ PGEU Annual Report 2015
<http://pgeu.eu/en/library/530:annual-report-2015.html>

⁹ Ibid.

¹⁰ A cost/benefit analysis of self-care systems in the European Union, April 2015
http://ec.europa.eu/health/patient_safety/docs/2015_selfcaresystemsstudy_en.pdf

¹¹ Expert Panel on Effective Ways of Investing in Health, 'Disruptive Innovation - Considerations for health and health care in Europe' (February 2016)
http://ec.europa.eu/health/expert_panel/opinions/docs/012_disruptive_innovation_en.pdf

improved health outcomes, more accessible, lower cost, person-centred services empowering patients/persons to manage their health and wellbeing.'

➔ *'Policy makers should also consider the importance of exploring new models of commissioning and financing for health services in the context of expanding some clinical roles to certain health professionals (e.g. nurses and pharmacists) when those tasks and services are increasingly being assigned to them.'*

- **European Health Forum Gastein:** The 2015 Gastein Health Outcomes recognised the following: *'A paradigm change is needed in the way we finance, organise and operate our health systems. Particularly to take into account demographic changes, rising healthcare costs, new patterns of disease and a shortage of skilled health workers. Strengthened primary healthcare, a better workforce skills-mix and technological innovations amongst other things can play a major role here.'*¹²
- **Australia:** In July 2015, the Australian government agreed to funding of A\$613 million (€392 million) over five years for the Sixth Community Pharmacy Programme, which includes an extended role for pharmacists in areas such as medication adherence, medication management and eHealth, among other elements.¹³
- **Ireland:** The Switch-on to Self-Care Working Group in 2012 proposed a self-care framework, in support of which it recommended an expanded role for pharmacists.¹⁴
- **Netherlands:** There is a policy to encourage collaboration between doctors and pharmacists through co-payment/reimbursement systems, IT infrastructure, regular meetings and accreditation.¹⁵
- **Portugal:** In 2014, the Association of Portuguese Pharmacies (ANF) and the Ministry of Health signed an agreement for the ANF to develop new services such as diabetes self-monitoring, adherence monitoring and flu vaccination.¹⁶
- **UK:** NHS England's *Five Year Forward View* published in 2014 committed to a new deal for primary care, including promoting community pharmacies as the place for the public to address minor ailments.¹⁷

¹² The Gastein Health Outcomes 2015

http://www.ehfg.org/fileadmin/ehfg/Programm/2015/EHFG_Gastein_Health_Outcomes_2015.pdf

¹³ Sixth Community Pharmacy Programme (2015)

<http://www.pbs.gov.au/general/pbs-access-sustainability/signed-sixth-community-pharmacy-agreement-commonwealth-and-pharmacy-guild.pdf>

¹⁴ 'Self Care First', A Self-Care Framework for Ireland proposed by the Switch-On to Self-Care Working Group (2012)

<http://www.ipha.ie/GetAttachment.aspx?id=71174101-5b88-489e-a0df-4d914a41a16d>

¹⁵ Report of the Working Group on Promoting Good Governance of Non-Prescription Drugs in Europe (June 2013)

<http://ec.europa.eu/DocsRoom/documents/7623?locale=en>

¹⁶ PGEU Annual Report 2014

<http://pgeu.eu/en/library/258:annual-report-2014.html>

¹⁷ NHS England, Five Year Forward View (2014)

<https://www.england.nhs.uk/wp-content/uploads/2014/10/5yfv-web.pdf>