

Key Findings from the Review of the Irish Community Pharmacy Sector 2014/2015

State Intervention

The State extracted **€2.1bn** from the medicine supply chain between 2009 and 2015. Reference pricing accounted for **€270m** of these savings.

Total reference pricing savings as at 31st December 2015

€270m

Consumer perception of pharmacies

Consumers' perception of community pharmacies remains very positive

Medical advice is good or very good

94%

Irish consumer

Value for money is good or very good

86%

Irish consumer

The attitude of consumers to community pharmacies

Employment

Employment numbers within the community pharmacy sector remain high. The average number of employees per pharmacy was twelve in 2015

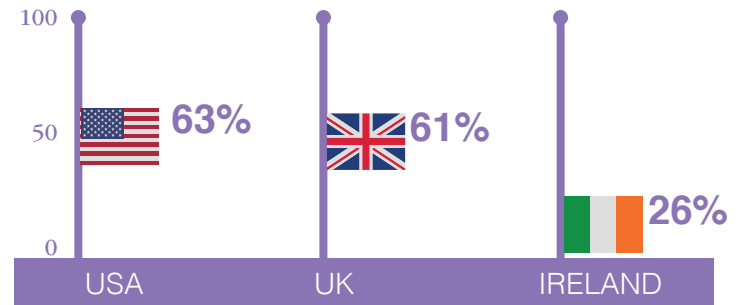
21,660



Community pharmacy sector staff numbers 2015

Ownership

The Irish Community Pharmacy market is predominantly independent compared to other developed nations

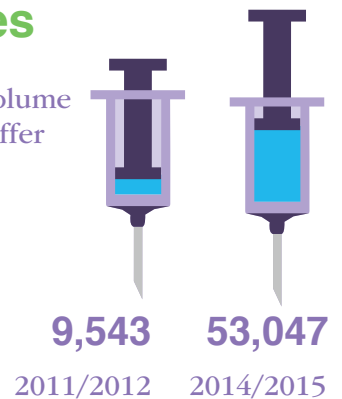


Percentage of pharmacies held in groups of six or more

Pharmacy based clinical services

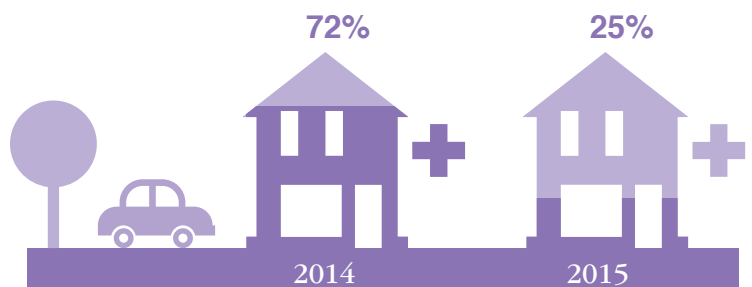
Pharmacists continue to increase the range and volume of clinical services they offer to patients

The number of flu vaccinations delivered in community pharmacies



Rent

Improving property market conditions have made rent renegotiations difficult



Pharmacists who successfully renegotiated their lease (of those who attempted to renegotiate)