

YOU



YOUR PATIENT

ALL IN **one**
a PHOENIX service

MAGAZINE

FOCUS TOPIC

BUSINESS
INTELLIGENCE
VALUABLE INSIGHTS
BEYOND THE DATA





Dear reader,

We are all facing big challenges being in the European healthcare sector. To be able to successfully master these challenges, we at PHOENIX group started a new approach from a transactional relationship to become your strategic partner. The result: Our European service brand: „All-in-One“, combining services for you along the entire value chain, from the production site to the point of sale - bringing you closer to your patients.

„The secret of getting ahead is getting started“, once said author Mark Twain. Let´s start this journey together. With this magazine, we would like to regularly inform you about European and local projects and services and hope you enjoy reading.

Stefan Jung
Head of Pharma Services

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Editorial team: Olaf Christiansen (V.i.S.d.P.; o.christiansen@phoenixgroup.eu), Nina Felton, Christian Wilke, Sofía Anza-Gomez, Casper Koch Villumsen, Julien Crèche, Julia Souty, Vesna Babic, Danijela Simovic, Hanne Bergholm, Thomas Sommereder, Eilidh Campbell, Helene Lantsheer.
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BUSINESS GROWTH



LOWER COSTS



OPTIMISED PROCESSES



SIMPLICITY

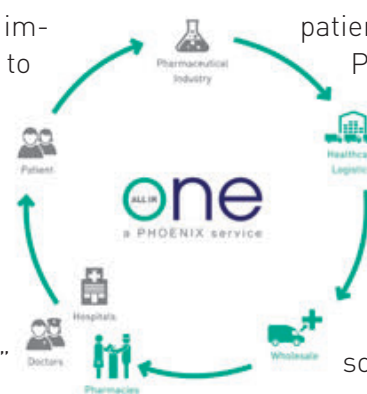


RISE TO THE CHALLENGE



We at the European healthcare provider PHOENIX group created a joined-up offering, spanning from warehousing, cross-border distribution, pharmacy access, business intelligence and patient care. Known as **PHOENIX All-in-One**, the concept combines the group's expertise within wholesale, pharmacies and value-added services into one easily accessed brand.

"There are lots of areas where we can improve the collaboration and processes to be successful together," says Stefan Jung, Head of Pharma Services Europe at the PHOENIX group who took over responsibility from Thomas Ehmann 1st October 2016. "It's about speed, it's about reducing costs; and here, we can create a win-win situation for the industry and for PHOENIX."



patients and manufacturers alike.

PHOENIX All-in-One can support when it comes to **specialty products** as well. With their biological origins and patient-specific formulation, such products place new demands upon storage, handling and distribution – demands that PHOENIX All-in-One, with its focus on tailored solutions, is well equipped to deliver.

The importance of better cooperation is particularly applicable, he feels, with regards to wholesale. "The wholesale relationship with manufacturers is a transactional one," he says. "With our value-added services, we would like to move from a transactional relationship to a strategic partnership."

Present in 26 countries in Europe, PHOENIX manages the entire distribution process, including storage, transportation and goods management. PHOENIX also owns a large collection of its own wholesalers and pharmacies.

With growing focus on cross-border market access for the industry, PHOENIX group has invested in creating additional **Healthcare Logistics** hubs with its CEE Bridge in Prague, Warsaw and Belgrade, to provide access to Central and Eastern Europe (see page 11) combined with local expertise. A soon-to-open Danish facility will be the company's largest warehouse, offering space for 50,000 pallets bound for the Nordic region (see page 8).

Beside this, PHOENIX can offer **Clinical Trial Supply Services**, working with partners in the region and providing access to populations throughout Europe. Working with pharmacies, it can also offer **patient-adherence programmes** to improve the prescribed uptake of medications – benefiting

"If you look at the pipeline for the next few years, 40 to 50 percent of new products will be specialty products," Jung points out. "These can be very expensive, so special distribution becomes very important."

Looking forward

We are also looking to the future in terms of its other area of expertise: **Business Intelligence**. Rather than competing with the industry's large existing data companies, PHOENIX All-in-One instead offers manufacturer-specific data on a daily basis, helping companies to improve the accuracy of forecasting and increasing product availability.

"Many companies struggle with product launches. What we offer is not just delivering raw data, we have analysts in place to offer targeted solutions, to help manufacturers improve business decisions based on insights into patient behaviour."

The ultimate aim, Jung explains, is that for any and every issue pharma companies encounter after the development and production of goods, manufacturers should think of PHOENIX All-In-One to resolve it. "For everything along the value chain – whether that is warehousing, dealing with pharmacies or dealing with patients – they should think of us", he says.

ACCESS TO SUCCESS

With PHOENIX Pharmacy Partnership, PHOENIX group has created the new umbrella for PHOENIX Pharmacy Cooperation Programs in Europe.

PHOENIX Pharmacy Partnership is the number one network in Europe with **9,000 independent pharmacy members** in 15 countries with 12 local brands. This network makes it possible for you, our industry partners, to secure even faster, simpler and more standardised access to European and local markets. At the same time, it guarantees its pharmacy members access to a portfolio of business opportunities that cannot be found anywhere else in Europe

PHOENIX Pharmacy Partnership offers direct access to patients through its pharmacy members.

Thanks to PHOENIX group's European coverage and excellent, specific market knowledge, PHOENIX Pharmacy Partnership can help its partners in the pharmaceutical industry to open up new markets in 15 European countries – quickly, efficiently and profitably. PHOENIX Pharmacy Partnership improves patient compliance while it interconnects pharmaceutical manufacturers with pharmacies and provides a close and direct access to the patient in a simple, trusting and reliable way.

“With PHOENIX Pharmacy Partnership, we provide individual pharmacies and pharmaceutical manufacturers across Europe with customised solutions for their local and regional needs”, says Oliver Windholz, Chief Executive Officer PHOENIX group. Thanks to its presence in a total of 26 countries and many years of experience as a pharmaceutical wholesaler, pre-wholesaler and pharmacy operator, PHOENIX possesses comprehensive

PHOENIX PHARMACY PARTNERSHIP



knowledge of local markets that are now being combined under one umbrella network.

PHOENIX Pharmacy Partnership and our own retail brands, both part of our All-in-One service offer, combine the synergies to create a whole variety of new growth opportunities for you. This is a further step for the PHOENIX group towards being the best integrated healthcare provider. Your access to success has never been so direct and close.

For more information about PHOENIX Pharmacy Partnership contact your local PHOENIX contact person, the All-in-One Sales Team or visit our website: www.phoenix-pharmacy-partnership.eu.

9,000

PHARMACIES

15

COUNTRIES

12

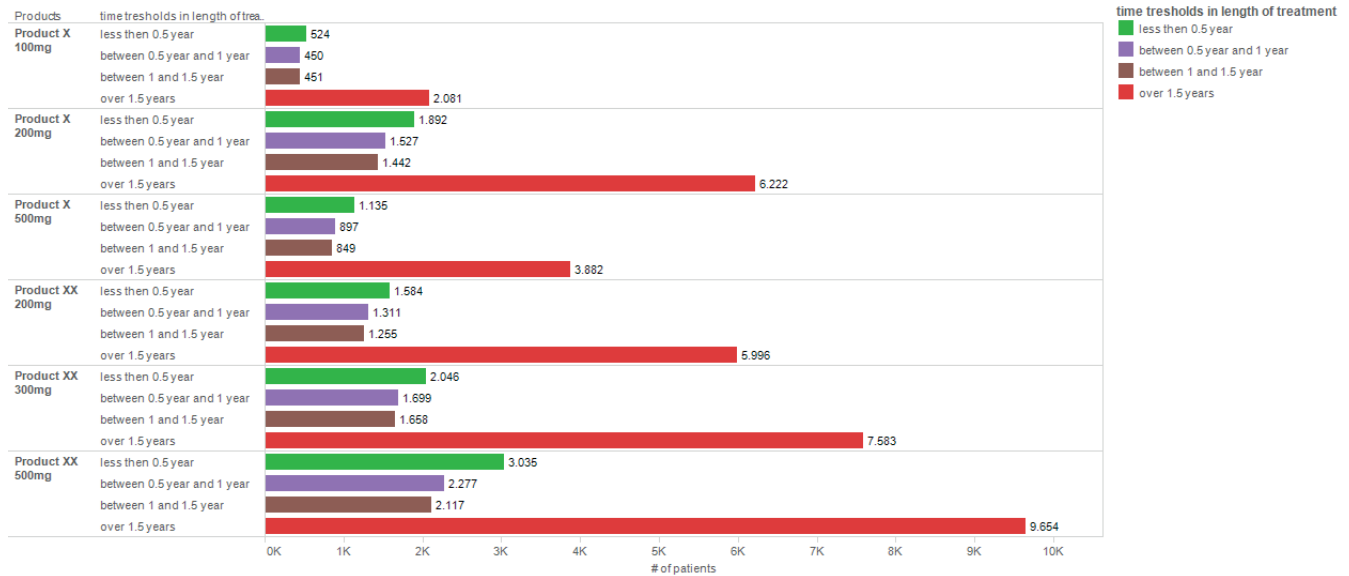
BRANDS

BI: PATIENT BEHAVIOUR INSIGHTS

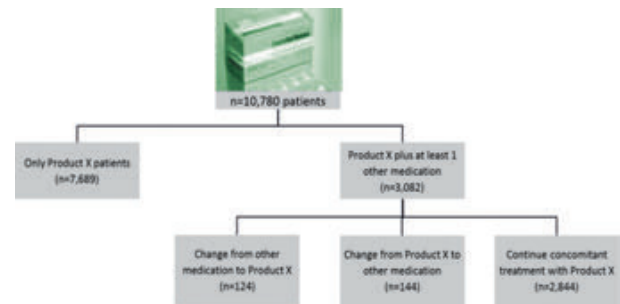
PHOENIX group has successfully kicked off our All-in-One Business Intelligence solutions in the major markets in Europe, which represents around two thirds of the total pharma sales of 500 billion Euros. Our aim is to provide business insights to enable our customers to make better business decisions.



length of treatment by groups



With our expertise in the European market in mind, the local PHOENIX UK BI team and the European Team together identified opportunities to conduct pilot projects with several industry partners. The challenge was how to use our huge pharmacy network to provide patient insights and support the needs for 'real world' evidence intelligence for their key brands.



We conducted the project using historical data over two years which gave us access to more than 150,000 patients. An analysis of dispensed prescribing behaviour attached to anonymised patient information helps us - and therefore our industry partners, to understand:

- Proportion of new patients
- The demographic profile of all patients that dispensed the medicine e.g. age and gender
- The average length of treatment by dosage form
- The switching behaviour by dosage form
- The patient pathway in terms of treatment algorithms which gives an understanding of lines of therapy.

The initial feedback from our customers is that the insights were **unique and valuable** and would be used as part of their strategic planning process. In addition, they wanted to set up a tracking tool to measure these important metrics on a weekly basis as part of a customised dashboard.

PHOENIX All-in-One is probably the best partner in Europe to get valuable patient insights providing win-win-win strategies for all, our customers, the patients and PHOENIX group.

[Contact bi@phoenix-all-in-one.eu](mailto:bi@phoenix-all-in-one.eu) to learn more and start a discussion about your tailor-made solution.

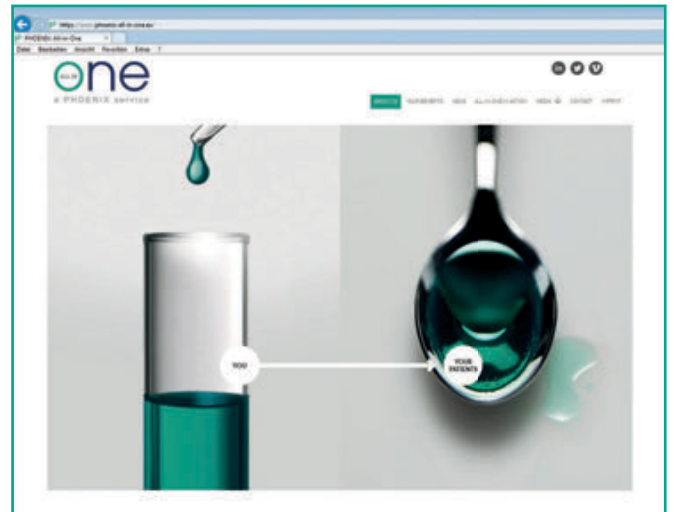
STAY UP TO DATE ONLINE

More than 400 million or around 80 percent of the EU citizens used the internet in 2015 – with the highest rate in Denmark (96%). A pretty good reason to be present there as a service brand, too. You can stay up to date with All-in-One on LinkedIn, Twitter and Vimeo.



On our homepage www.phoenix-all-in-one.eu, you can find everything around our European service brand All-in-One, materials like brochures and our short video, news about services and events and all details of both the local contacts and the central team that take care of the eight focus areas Partnerships, Business Intelligence, Patient Services, Healthcare Logistics, Clinical Trial Supply Services, Specialty, Supply Chain Optimisation and Sales Support.

The page is dynamic and optimised for mobile usage as well - so it can be used either on your desktop computer or with any mobile device.



LinkedIn, founded in 2002 in the USA and in March 2016 acquired by Microsoft, is a B2B social network to share business information. Around 450 million people around the world are registered there. PHOENIX All-in-One is present with a so called "company page" (www.linkedin.com/company/phoenix-all-in-one) since the beginning of this year. We frequently share news on this site and you

are welcome to follow the page to get the latest updates.

The micro blogging-service Twitter was launched ten years ago and rapidly gained worldwide popularity. Today, Twitter has more than 310 million monthly active users worldwide with a growing number using mobile devices - today more than 80 percent.

As "tweets" are limited to short 140-character messages, you will mostly find pictures and links to other sources on our account www.twitter.com/all_in_one_phx. Even users who are not registered can read them.

Our 1:46 minute video guiding you through the service portfolio of PHOENIX All-in-One as well as the new corporate video "people matter" and other PHOENIX group videos are now available on the video-sharing website Vimeo, founded in November 2004: <https://vimeo.com/phoenixallinone>.

We are happy to welcome you soon on our web presences and are of course open for discussions if you miss any important content.



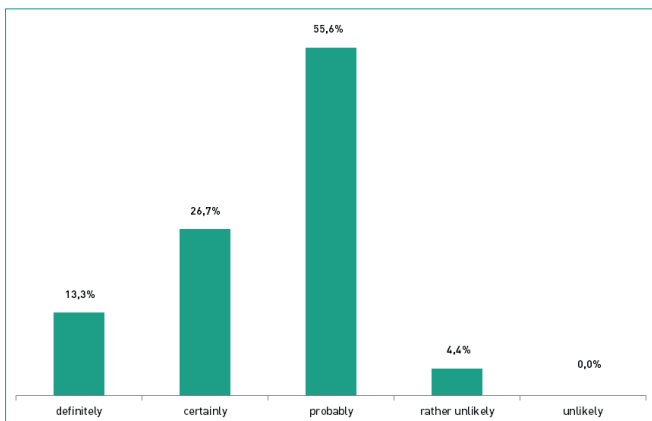
MANUFACTURER SURVEY

All-in-One as our European service brand started less than a year ago. In July, we wanted to know how we and our brand are perceived by you, our industry partners, and started an online-survey. Maybe you were invited, too and helped us to understand your needs even better. The response rate was pretty high with 18,6 percent. Thanks -to all that participated.

PHOENIX group is a well-known European Healthcare company – but up to now, mostly known as a successful wholesaler being market leader in ten countries including Germany and Italy. But PHOENIX group is more than just that. With more than 2,000 own pharmacies in 12 European countries, 9,000 pharmacies within the new PHOENIX Pharmacy Partnership (see page 4) and our Healthcare Logistics network, PHOENIX group is an integrated healthcare provider.

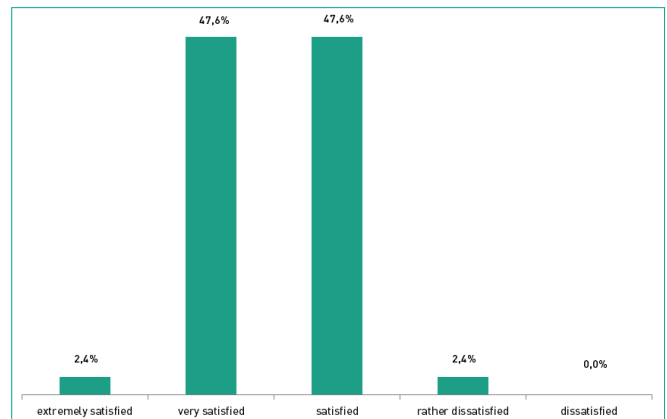
To offer European and local solutions along the entire value chain, the service brand “All-in-One” was set up in November 2015. Everything we do at PHOENIX All-in-One is focused on you, our industry partners. That is why we started an online-survey to understand better how you perceive our offer and what we can do to offer you even better services to fulfil your needs. The result was very positive: **More than half** of the participants are extremely or very satisfied with our services offered and **more than 60 percent** will definitely or certainly use other services out of our eight focus areas Partnerships, Business Intelligence, Patient Services, Healthcare Logistics,

Are you likely to also use other services or focus areas offered by PHOENIX All-in-One?



Source: Online-Survey All-in-One 14/07/2016 – 23/08/2016 done by PHOENIX group market research.

How satisfied are you in general with PHOENIX All-in-One?

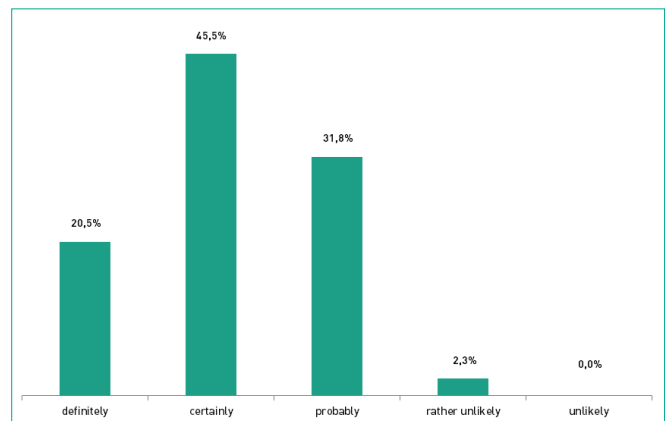


Source: Online-Survey All-in-One 14/07/2016 – 23/08/2016 done by PHOENIX group market research.

Clinical Trial Supply Services, Specialty, Sales Support and Supply Chain Optimisation. **93,6 percent** will definitely, certainly or probably recommend our services to colleagues.

We are happy with these positive results and will continue to work closely together with you in creating tailor-made solutions for our future cooperation. If you haven't participated, please share your opinion with us anytime!

Would you recommend PHOENIX All-in-One to your colleagues?



Source: Online-Survey All-in-One 14/07/2016 – 23/08/2016 done by PHOENIX group market research.

BIGGEST NORDIC WAREHOUSE

Nomeco can now begin to build the new high-tech giant warehouse in the city of Køge south of Copenhagen, which will be an important bridgehead for land transport between Continental Europe and the Nordic countries and huge improvement for PHOENIX group's Healthcare Logistics network in Scandinavia.



Flemming Christensen, Mayor of Køge (left), and Nomeco Logistics Director, Per Hansen.
Photo: Morten Wøldike.



Nomeco Logistics Director Per Hansen interviewed by a local Danish TV station.
Photo: Morten Wøldike.

Nomeco, part of the PHOENIX group, is investing half a billion Danish crowns (around 70 million Euro) in the Nordic region's largest pharmaceutical warehouse in the Scandinavian Transport Centre in Køge just south of Copenhagen. The building should be ready in the summer 2018 and represents PHOENIX group's largest single logistics investment to date.

In August 2016, the project came one step closer when Nomeco was handed over the building permission by the mayor of Køge, Flemming Christensen.

"The building permit is an important milestone in our large construction project. This means that the municipality has approved our plans for the building - including the design and location of the building, which is 30 meters high and will take up the equivalent to three football fields," says Nomeco Logistics Director Per Hansen.

With the new warehouse PHOENIX group strengthens the ambition to bring together all services and facilities under one roof. According to Per Hansen, Køge is absolutely perfect as a traffic hub for distribution to Scandinavia:

"The pharmaceuticals typically come from the south and are bound for northern destinations, and our new warehouse will be located optimally on the route between the future bridge between Germany and Denmark and the bridge from Denmark to Sweden. The transportation infrastructure around Køge and good opportunities to quickly get to and from the highway gives the best conditions for a rapid and efficient transportation," he says.

In the new warehouse, Nomeco will cover all warehouse facilities and services for the pharmaceutical industry. The next major milestone in the project will be the first sod, which is expected later this year.

Casper Koch Villumsen, Nomeco Denmark



BUSINESS GROWTH



LOWER COSTS



OPTIMISED PROCESSES



SIMPLICITY

BI SOLUTIONS IN FRANCE



France is the second largest European market for pharmaceutical products. PHOENIX France, following the PHOENIX group vision to be the best healthcare provider, wherever we are, is continually developing its range of services, especially towards the pharmaceutical industry.

PHOENIX France offers to our industry partners, within the All-in-One brand, value-added services across all steps of the distribution chain, to the patient. All-in-One in France is built around multiple services: Supply Chain Optimisation, Healthcare Logistics, Patient Services, Sales Support, Partnerships and Specialty offerings. We would like to focus, on this occasion of the first edition of the All-in-One magazine, on our Business Intelligence (BI) service.

As a main actor in the distribution channels from manufacturer to patients, we collect and analyse large volumes of data. Can you imagine that PHOENIX wholesale in France sends to the manufacturers more than 3,6 Million lines per year, whereas in the same time our Pharmavie pharmacies deliver more than 230 Million units with regular contact to 4 Million patients each year? PHOENIX has historically been able to provide you information, regarding your stock or sales.

What is new in our Business Intelligence offer, is that we can provide an overview of your products or your market, across all activities (PHOENIX Pharma wholesale, Ivrylab pre-wholesale, and PharmaVie pharmacies), in real time. Our expertise to analyse and understand point of sales data represents an important advantage before your competitors. We see a lot of interesting opportunities for your company and your daily business to have these valuable insights.

Building relevant and tailor-made dashboards to help you better understand the market is the key objective for PHOENIX. Based on a web solution, you can easily access your BI solutions from your office.

Thanks to this powerful tool and our comprehensive view of the distribution channels, we can eas-



Julia Souty and Julien Crèche take care of the All-in-One communication and services in France.

ily render key relevant intelligence that answers these key questions:

- Is the launch of my new product a success?
- Should I intensify the promotion of my product in a specific region?
- What is the Return on Investment from a regional perspective?
- What is the on-shelf-availability of my key products?
- Is my product being prescribed for the right patients in terms of demographic profile?

If you need some further details regarding our BI service, it would be a pleasure for us to discuss your needs and give you a demonstration of our solutions: Julien.Creche@phoenixpharma.fr.

Julien Crèche, Pharma Services France

SUCCESSFUL WEBINARS



PHOENIX Croatia, in cooperation with the pharmaceutical industry, has recently started a series of professional trainings for pharmacists as webinars. The participants have access to all information and enable a more direct communication between industry and pharmacists.

PHOENIX in Croatia is known for its continuous development of innovative services for industry partners. As part of PHOENIX All-in-One, a series of professional training webinars is being offered to the industry as a modern method of informing and providing training for pharmacists.

“Via this online platform, PHOENIX Croatia connects pharmaceutical companies and pharmacies, attempting to compensate for the lack of traditional training methods, with focus on simplicity and improvement of the training results”, says Antone-ta Peric, Customer Service Manager at PHOENIX Croatia. PHOENIX, in cooperation with the manufacturer, uploads a **five to ten-minute audio-visual presentation** to its online platform, where it can be accessed by pharmacists at any time via computer, tablet or smartphone.

“The training material is versatile and webinars provide information from the permanent profes-



sional training programs referring to recently registered medications and new acknowledgments related to the treatment of diseases or patient safety. Frequent topics include the segment of OTC products, introducing **new products** to the market, additional information on existing products or refreshing knowledge and promoting seasonal products” says Mrs. Peric.

This type of training enables pharmaceutical companies to quickly but thoroughly inform the whole pharmacy team, especially on topics for which no professional training sessions are usually held. Presentations are intended for pharmacists and pharmaceutical technicians, whereby a successfully passed short assessment test after each completed webinar session proves that precise and reliable information has been properly transmitted to the pharmacist.

Pharmacists appreciate this way of getting information: “I find PHOENIX webinars very satisfying.”, “An interesting and innovative way of presenting products!”, “Thanks, it’s very supportive even after so many years of experience in pharmacy!”

Vesna Babic, PHOENIX Croatia

Ana Gongola, Business Area Manager Rx Retail, Sandoz Ltd.:

“We had an opportunity to use e-learning services provided by PHOENIX Croatia as our medication AirFluSal Forspiro was being released to the market.

We were extremely satisfied with the services provided because during a 2-week webinar a high quality training was successfully completed by 1,000 pharmacists in the Croatian pharmacies.

Pharmacists evaluated the webinar as extremely useful and of superior quality. Especially valuable was the possibility of communicating with pharmacists, whereby we not only heard their opinion, comments, ideas and suggestions, but we were also able to answer the questions they had. The webinar proved to be a superior, efficient and quick way of training and communicating to our pharmacists.”

YOUR LINK TO THE REGION



More than a year ago, PHOENIX group opened its first hub in Prague, Czech Republic, being part of our new cross-border Healthcare Logistics solution for Central and Eastern Europe: “CEE Bridge”. With Warsaw, Poland (March 2016) and soon Belgrade, Serbia, all three hubs are up and running.



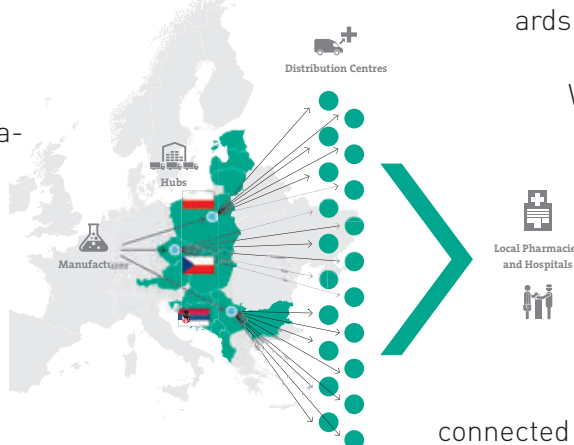
The new Belgrade hub is situated around 30 kilometer from the city center in the industrial zone, near the airport and main roads leading to Budapest, Sofia, Skopje and Zagreb. As the part of the CEE Bridge project and the new concept of operations “Regional distribution service model - HUB network solution”, the new hub in Belgrade will offer new services for our industry partners.

The new hub in Belgrade is Green Field Investment, which gives us the opportunity to plan the specification of user requirements to comply all Good Distribution Practice (GDP) entails. The requirements of integrated management system are fulfilled there and so are the principles of environmental protection, safety and health at work and other regulatory and institutional requirements.

Our high bay warehouse is a modern, 6-pallet-level warehouse with a capacity of around 12,000 pallets – of which 500 pallet positions are in the cold chain. The building has got an area of 10,230 square meters, of which the modern warehouse

space covers 7.620 square meters. The storage area is equipped according to the latest technical standards, with separate storage segments intended for receiving, shipping or storage. State of the art monitoring equipment ensures the high quality standards of the warehouse. The sensors closely monitor temperature and humidity, with warehouse management systems with the access control, video surveillance and sprinkler system to meet the most demanding standards of modern healthcare logistics.

CEE BRIDGE: One network with unlimited solutions.



With the opening of the hub in Belgrade, we are able to reduce the complexity of international logistics processes significantly which leads to reduced costs by optimising the stock levels. The CEE Bridge networks ensures access to regional connected markets in the entire region.

We are sure that our partners will recognise the benefits of unique solutions offered by the concept of All-in-One where the HUB Belgrade represents an important link in the logistics chain both in Healthcare Logistics and wholesale towards pharmacies.

Danijela Simovic, PHOENIX Serbia

COUNTRY UPDATES

PHOENIX group has an unparalleled coverage in Europe, being present in 26 countries with around 120 million patient contacts in almost 15,000 pharmacies, both owned and in cooperations. On this "country update" page, you find short news from the PHOENIX group countries.

Tamro in Finland

Sunstar Excellence Award 2015 for Tamro, a PHOENIX company



Tamro Corporation from Finland has received the Sunstar Excellence Award 2015 for the best GUM (oral hygiene) brand market shares of the dental care products in Europe. It is an excellent recognition for Tamro's category management, sales team and product marketing.

„Our success is based on long-term cooperation with oral hygiene and pharmacy professionals. We have developed GUM product portfolio according to the needs of the Finnish pharmacy market, which has positively supported our sales activities“, says Eric Korpi, Head of Tamro's Category Management.

PHOENIX in Austria

Extension of warehouse capacities



PHOENIX Austria invest in the extension of the Healthcare Logistics warehouse capacities in the growing market of Austria. With the last expansion stage, finished next year, PHOENIX will triple the capacity in the modern warehouse to about 10,000 sqm and over 19,000 pallet places, around 1,000 of them will be available in the temperature range of 2 to 8 °C.

This expansion underlines the commitment to the industry and gives PHOENIX Austria the possibility to extend the high level services for warehousing, distribution and GMP packaging as well as additional Healthcare Logistics activities like order management, order-to-cash and supply chain optimisation.

PHOENIX in UK

Patient Data Level for BI solutions



Through the owned and co-operative Pharmacy chains (Rowlands Pharmacy and Numark), PHOENIX UK is able to utilise **patient level data** to provide insight into product usage at the point of dispensing, optimise portfolio, positioning and market access of Pharmaceutical products. We are able to provide detailed geographical insight via our network and ensure high quality monitoring, in real time, of manufacturer product performance.

The information held at PHOENIX UK can be seen as an enabler for healthcare companies to make better informed business decisions underpinned by three key objectives. See page 5 for further information.

Brocacef in The Netherlands

Expanded services after acquisition



Brocacef Group, a PHOENIX company, acquired Mediq Apotheken Nederland BV in June 2016.

This acquisition brings expanded services within All-on-One for manufacturers: The number of pharmacies will increase to more than 500, which means activities will now have an even bigger impact on the market and patients than before.

The Patient Services offer (e.g. adherence programs) will be significantly increased after the acquisition from Brocacef of the Mediq GFZ. Brocacef will now offer professional Healthcare Logistics (Pre-Wholesale) services throughout the Netherlands.