

**INTERNATIONAL FEDERATION OF
PHARMACEUTICAL WHOLESALERS**



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Who we are and our mission...

The International Federation of Pharmaceutical Wholesalers (IFPW) represents a strong, effective platform to establish strategic dialogue within the global pharmaceutical community. The association is dedicated to helping its members and stakeholders advance the safe, efficient and continuous access to pharmaceuticals worldwide through the promotion of good distribution practices and services. Companies participating in IFPW have indispensable opportunities to network with their colleagues and explore future business ventures.

Our strategic objectives...

The Board of Directors has developed the following strategic objectives for 2016, ensuring all industry leaders in the pharmaceutical supply chain are involved.

- ♦ *Improve the image and promote the value proposition of full-line wholesalers to all stakeholders.*
- ♦ *Strengthen key stakeholder relationships through engaging in meaningful and relevant dialogues.*
- ♦ *Participate in initiatives to improve access to medicines and/or advance global health*
- ♦ *Continue to serve as the industry's international networking and information platform.*

The pharmaceutical industry's future outlook...

The economic crisis is adding another layer of complexity to an already challenging market environment. As deterioration in the global economy continues to affect market demand, future worldwide growth rates are expected to be the lowest in at least 25 years. The forecast by IMS Health announces a world pharmaceutical market growth level down from 2015 levels.

The pharmaceutical industry will feel the impact of the economic climate, but to a lesser extent than many other industries. The current global pharma market is just over US\$1.1 trillion in 2016. In the U.S., the biggest market for prescription drugs, the market is expected to contract for the first time in more than 50 years. Over five years, average annual growth is likely to be nil in the U.S.

Taking the five largest European markets (Germany, France,



Italy, the U.K. and Spain) together with Japan and Canada, the average yearly growth rate will range between 1% and 4% over the next five years. Each market reflects a unique set of mechanisms to manage healthcare access and costs, including a growing emphasis on regional decision making, promotion of generic drug usage, and price reductions.

Higher growth is expected in some pharmerging markets (Russia, India, China, Turkey, Mexico and Korea), with average annual growth of 12% to 15% predicted. The seven pharmerging markets contribute more than half of global market growth going forward and sustain an average 40% contribution. China is now the third largest pharmaceutical industry.

Despite the pressures, there is still room for new drug launches and potential blockbusters. IMS predicts that between 50 and 60 new medicinal products will reach the market in the coming two years. Two thirds of these will be products aimed at niche uses and narrow patient populations.

While the pharmaceutical market is expected to rebound as the global economy recovers, an unprecedented level of potential patent expirations will curb sales growth.

The current global financial upheaval should force drug makers to make significant changes, including expanding into emerging markets and raising the bar for developing new drugs. To strengthen their resilience, pharmaceutical manufacturers must adapt their strategies and tactics – re-evaluating their commercial models, pursuing opportunities in emerging markets, and strengthening the value proposition of their medicines in ways that resonate with payers and patients.

Because nearly 80% of all healthcare industry sales are sold through distribution companies, IFPW ensures its members are kept abreast of this changing marketplace.

IFPW members...

IFPW membership is classified by four membership categories:

Association - A national pharmaceutical distributors' organization. For countries which have no national trade association, the pharmaceutical distributor doing in excess of 50 percent of the wholesale trade would be considered an association member.

Wholesaler/Distributor - Individual pharmaceutical wholesale firms that participate directly in IFPW. There are thirty-four (34) wholesaler members. Most major wholesalers/distributors participate in IFPW.

Manufacturer - Suppliers of ethical pharmaceutical and proprietary medicines and producers of other products distributed by pharmaceutical wholesalers.

Service Organization - Firms which provide a service, product or value to distributors for the distributors' internal use.



IFPW's member companies span the 19 countries and are segregated within four geographical regions. Among the countries represented are...

Argentina	Finland	Norway
Australia	France	Peru
Austria	Germany	South Africa
Belgium	Hong Kong	Switzerland
Brazil	Japan	United Kingdom
China	Korea, South	United States
Chile	Mexico	

EUROPE, MIDDLE EAST & AFRICA

CV Protek
Eurapharma
Imperial Health Services
Oriola-KD Corporation
Norsk Medisinaldepot A/S
Parazelsus Ltd
United Pharmaceutical Distributors (UPD)

UNITED STATES & CANADA

AmerisourceBergen Corporation
Cardinal Health Inc.
H.D. Smith
McKesson Corporation
Walgreens Boots Alliance

IFPW Board of Directors...

IFPW's distinguished Board of Directors represents all four regions, and includes representatives from wholesale member companies...

Ornella Barra

Walgreens Boots Alliance

Steve Collis

IFPW Chairman

AmerisourceBergen Corp.

Eero Hautaniemi

Oriola-KD Corporation

Paul C. Julian

McKesson Corporation

Zhiming Li

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Elias Salomon Nader

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Ken Suzuki

IFPW Vice Chairman

VITAL-NET, Inc.

Wang Chuncheng

China Resources
Pharmaceutical Group

Eric Zwisler

Cardinal Health, Inc.



*IFPW's 2014 General Membership Meeting
in Beijing, China*

Our wholesale members include...

ASIA & AUSTRALIA

Baheal Pharmaceutical Group
Chongqing Medicines Co., LTD.
China Resources Pharmaceutical
Commercial Group
EBOS Group
Medipal Holdings Corporation
Nakakita Yakuhin Co., Ltd.
Nanjing Pharmaceutical Co., Ltd.
Sinopharm Group Co., Ltd.
Suzuken Company, Ltd.
Toho Holdings Co., LTD
VITAL-NET Inc.
Yichang Humanwell Co., Ltd.
Zuellig Pharma Asia Pacific

LATIN AMERICA

Drogueria del Sud S.A.
Fármacos Nacionales SA de CV
Nadro, S.A.P.I. de C.V.
Profarma Distribuidora de Produtos
Farmacêuticos S/A
Prosper Log Distribuidora
Quícorp
SantaCruz Distribuidora

The IFPW Foundation is a 501(c)3 organization based in Virginia which serves as the charitable and educational arm of the International Federation of Pharmaceutical Wholesalers, Inc. (IFPW).

Established in 2014, the IFPW Foundation supports organizations and initiatives that improve the availability of medicines to patients in need and supports the efforts of full-service pharmaceutical wholesalers around the world in ensuring the continuous availability of pharmaceuticals, when and where they are needed.

Currently, the IFPW Foundation participates in several global activities, including:

GAVI Alliance

Collaborating with the alliance on the development of its Supply Chain Strategy to ensure vaccines reach patients in the world's poorest countries

Fight the Fakes

Partnership to raise awareness of counterfeit medical products and to prevent counterfeits from infiltrating the legitimate supply chain.

Every Newborn Action Plan (ENAP) and Every Woman Every Child (EWEC)

Working with other stakeholders under a joint action platform for the reduction of preventable newborn mortality and ensuring/improving the availability of essential medicines and health commodities.

PAHO / WHO / IFPMA

Dialoguing with key stakeholders on other important Global Health topics, such as Universal Care Coverage, Anti-microbial Resistance (AMR), etc.



IFPW chairman, Ornella Barra, with Bill Gates of the Bill and Melinda Gates Foundation, and members of the GAVI Alliance

Our IFPW Foundation Board of Trustees...

Ornella Barra

Walgreens Boots Alliance

Steve Collis

AmerisourceBergen Corp.

Jean-Marc Leccia

Eurapharma

Juan Mulder

Quícorp

Eric Zwisler

Cardinal Health, Inc.