



SAACP NEC Meeting
20 February 2022

Market Review - IQVIA

Private mkt		Share	PPG%
Value	51.6bn	84,6%	8,4%
Units	601.2m	60,7%	7,1%
CU	53.8bn	69,5%	6,1%

Rx mkt**		Share	PPG%
Value	31.8bn	61,6%	7,2%
Units	198.2m	33,0%	4,1%
CU	13.8bn	25,7%	2,4%

OTC mkt***		Share	PPG%
Value	19.8bn	38,4%	10,5%
Units	403.1m	67,0%	8,7%
CU	40.0bn	74,3%	7,4%

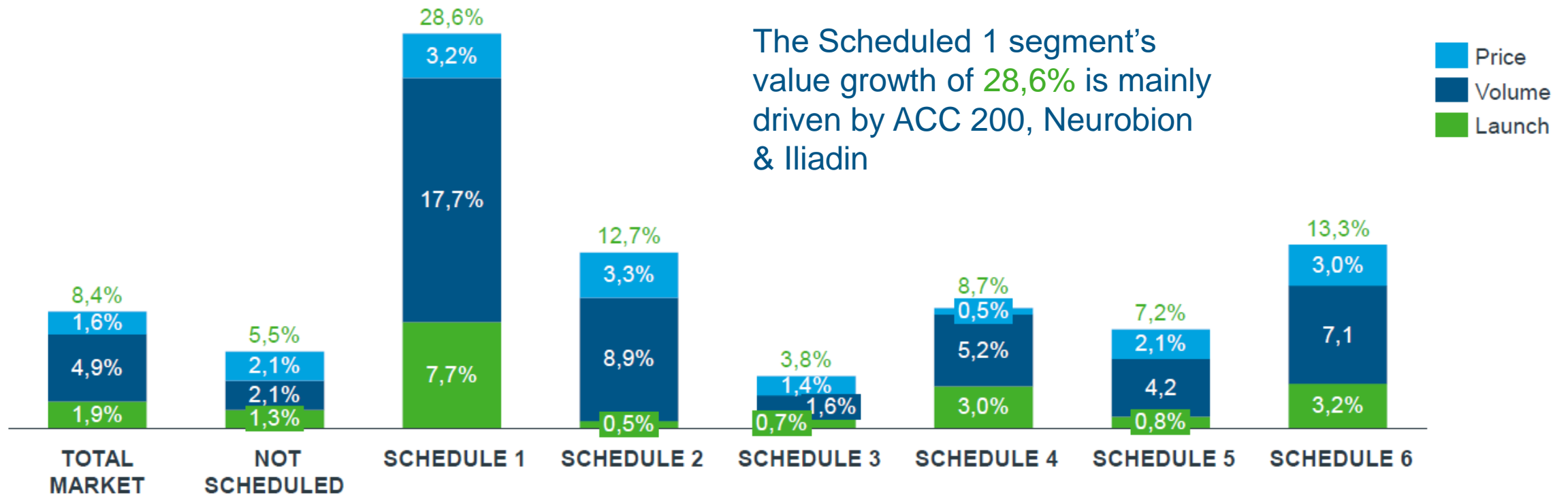
The generic segment is responsible for the significant growth in the prescription market with 11,0% in value & 5,3% in volume during the latest MAT period.

The OTC market represents 38,4% and 67,0% of the value and volume respectively within the private market

Schedule 1 segment showed the highest growth performance during the current MAT 12'21 period with an overall 28,6% growth

All scheduling status segments are showing growth within all three elements

MAT 12'21 Elements of Growth % Contribution



COVID-19 Vaccination Roll-out

- Community Pharmacy remains the backbone of the COVID-19 vaccination rollout programme
- 68% of all vaccinations in private sector have been done by pharmacies
- Over 31 million vaccines have been given
- Private sector have vaccinated >4m uninsured people in the largest PPP ever
- Demand generation remains the toughest challenge going forward as more pharmacies close vaccination sites as they fear vaccines expiring before they are used
- ICPA issues a vaccine mandate with end March deadline to vaccinate all pharmacy staff

COVID-19 STATISTICS IN SOUTH AFRICA



22 830 172

TESTS CONDUCTED



3 654 824

POSITIVE CASES



3 518 316

RECOVERIES



98 298

DEATHS



2 800

NEW CASES

IPEF – looted pharmacies

ICPA setup the Independent Pharmacy Emergency Fund to raise R20m

R8 898 521,77 was raised as cash donations from 50 donors and R1,5m in goods/services

A further R10 to R20m has been granted from SF being distributed by the NEF

All IPEF funds have been disbursed to the pharmacies

86 pharmacies affected 72 pharmacies required time to repair and financial assistance

5 remain closed of which 2 are in the process of opening this month

IPEF currently undergoing an internal audit by Meridian Accountants

IPEF will remain as an emergency fund for pharmacies in stress going forward

Legal

Clicks Unicorn

- The Supreme Court of Appeal found in Clicks' favour
- Two judgments were delivered, with majority of the judges agreeing with Clicks and a minority judgment in our favour.
- ICPA have now applied for leave to appeal to the Constitutional Court.
- The current strategy is to approach organisations within the industry to join as amicus.
- Furthermore, ICPA is requesting a meeting with the Minister of Health to discuss this matter further.

CMS – DSPs & penalty copays

- On 23 April 2021 CMS published a declaration in the Government Gazette declaring certain practices by medical schemes as undesirable
- Health Funders Association NPC et al have appealed the decision to publish the declaration.
- ICPA have appointed its attorneys and counsel to oppose the appeal.
- It is anticipated that the appeal will be heard in March 2022.

Legal

Section 59 Investigation:

- ICPA made further submissions to the investigation panel to assist with their final report.
- Despite the interim report and the Ngoepe Judgment, Schemes are persisting with unreasonable requests within their audits. We are meeting with Medscheme and have asked for their Standard Operating Procedures relating to audits.
- ICPA have also made submissions to be incorporated in the FWA Charter and code of good practice

Pharmacy Licences

- New licencing guidelines have been published for implementation 1 March 2022
- ICPA has a meeting with NDoH to discuss the licencing process and new criteria.

Legal

SAHPRA – permit for S5 & S6 waste destruction

Two guidelines were published by SAHPRA for 2 weeks comment at the end of September 2021

- 5.05 Guideline for destruction of Schedule 5,6,7 and medicines/substances
- Guideline for Permits and Authorisation requiring a fee
- R950 to obtain a permit before S5/S6 meds can be disposed of
- ICPA and PSSA, on behalf of the Pharmacy First Forum, met with SAHPRA to establish what SAHPRA are trying to achieve, to point out the flawed process and to inform them that we believe they are acting ultra vires the Medicines Act



The Pharmacy Show



The Pharmacy Show is the fastest growing and largest pharmacy exhibition in South Africa and SADC.

This event brings together the largest gathering of industry professionals, all aiming to redefine the pharmacy industry for the better.

We expect over 2000 pharmacists and 200 exhibitors at this year's conference.

ICPA is hosting a two-day educational symposium bringing 12 clinical and business CPDs over 2 days for our attendees.

The event will be hosted at the Sandton Convention Centre on the 6th and 7th April 2022.

Time	Topic	Blurb	Speaker
10.00 - 10.10	Welcome		Kgabo
10.10 - 10.30	Since we last met	A quick update on a few hot topics from 2021 and emerging trends and forecasts for the future of community pharmacy.	Dr Sham Moodley
10.30 - 11.00	Take 5! Expense-reducers and revenue-generator ideas from pharmacy peers	Panel of 4 pharmacy owners – who discuss ways to increase your pharmacy revenue, quick tips on customer service and the role it plays in generating revenue, easy steps to making a productivity change in your business. 5 minutes each and 10 minutes of Q&A at end	Ackermans Pharmacy Salmarz Pharmacy Spruitview Pharmacy Khutsong Pharmacy
11.00 - 11.30	BREAK		
11.30 - 13.00	PIMART	Pharmacists contributing to reducing the HIV treatment burden in South Africa	Prof F Venter (Divisional Director:: Ezintsha, Wits)
12.00 - 12.30	The COVID-19 Vaccine rollout & NHI landscape	Understand how the COVID-19 vaccination rollout translates into an evolving NHI landscape	Dr Nicholas Crisp (Deputy Director General: National Health Insurance, NDoH)
12.30 - 13.00	Q&A		
13.00 - 14.30	LUNCH		
14.30 - 15.00	Telemedicine	Live demonstration of a telemedicine consultation solution for pharmacy	Siraaj Adams
15.00 - 15.20	Kamba Ya Shanga	Asthma Management in the pharmacy. Managing asthmatic patients while at home. Challenges and opportunities presented during Covid-19 lockdowns	Shivani Baldeo
15.20 - 15.40	The Current State of the Pharmacy Market	An update on the Community Pharmacy Industry - the power of data in the community pharmacy sector, how supply and demand will affect your business	Michelle Griessel - IQVIA
15.40 - 16.00	Litigious matters	An update on legal cases involving Section 22A of the Pharmacy Act and CLICKS, and Council for Medical Schemes on DSPs and Penalty Co-Payments	Mogamat Botha - attorney
16.00 - 16.15	Q&A		

ICPA Symposium

Draft
Programme
(speakers TBC)
6 April 2022

ICPA Symposium 7 April 2022

Time	Topic	Blurb	Speaker
10.00 - 10.20	Missed Opportunities and Medical Schemes	An update on ways to improve patient health and maximise income from medical schemes	Ahmed Bayat
10.20 - 10.40	The Management of Fever in children	Sponsored by GSK	TBC
10.40 - 11.00	The Independent Pharmacy Emergency Fund (IPEF)	Following the riots and looting of July 2021, 86 independent pharmacies were left destroyed. Join us as we celebrate their resilience and fortitude and thank the many stakeholders who contributed to their recovery.	Dr Mariet Eksteen & Jackie Maimin
11:00 - 11:30	BREAK		
11:30 - 11.50	The future of pharmacy	The student perspective of pharmacy - what they need from their leaders - how can we learn from one another	SAPSF President
11.50 - 12.15	ICPA Data Warehouse	The power of data and how it can improve your business and strengthen ICPA negotiation capabilities	Rhain Stander
12.15 - 12.45	How to become a Grade A Pharmacy	Understanding the inspection process, grading and improvement plans.	Vincent Tlala (Registrar SAPC)
12.45 - 13.00	Q&A		