NAVIGATING THE CHANGING PHARMACY LANDSCAPE

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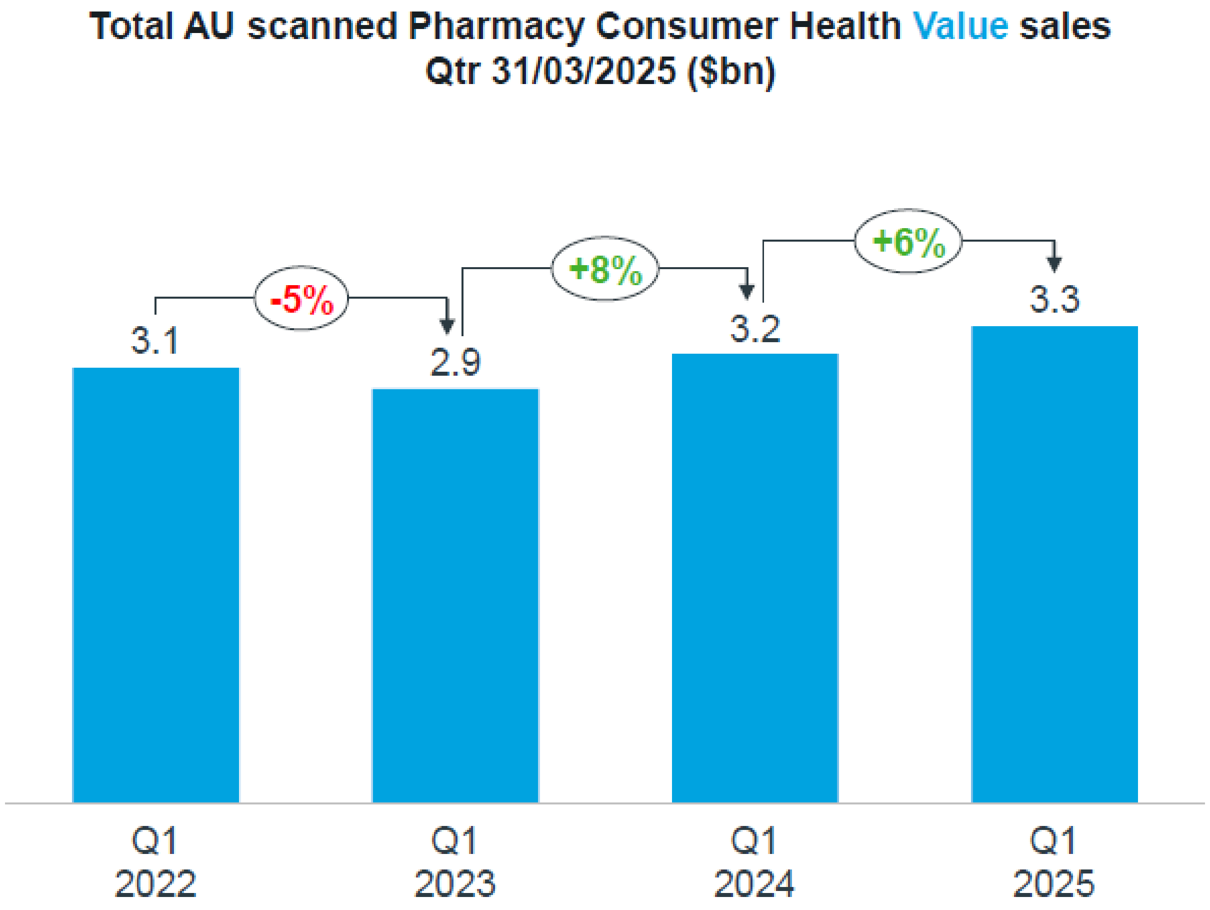
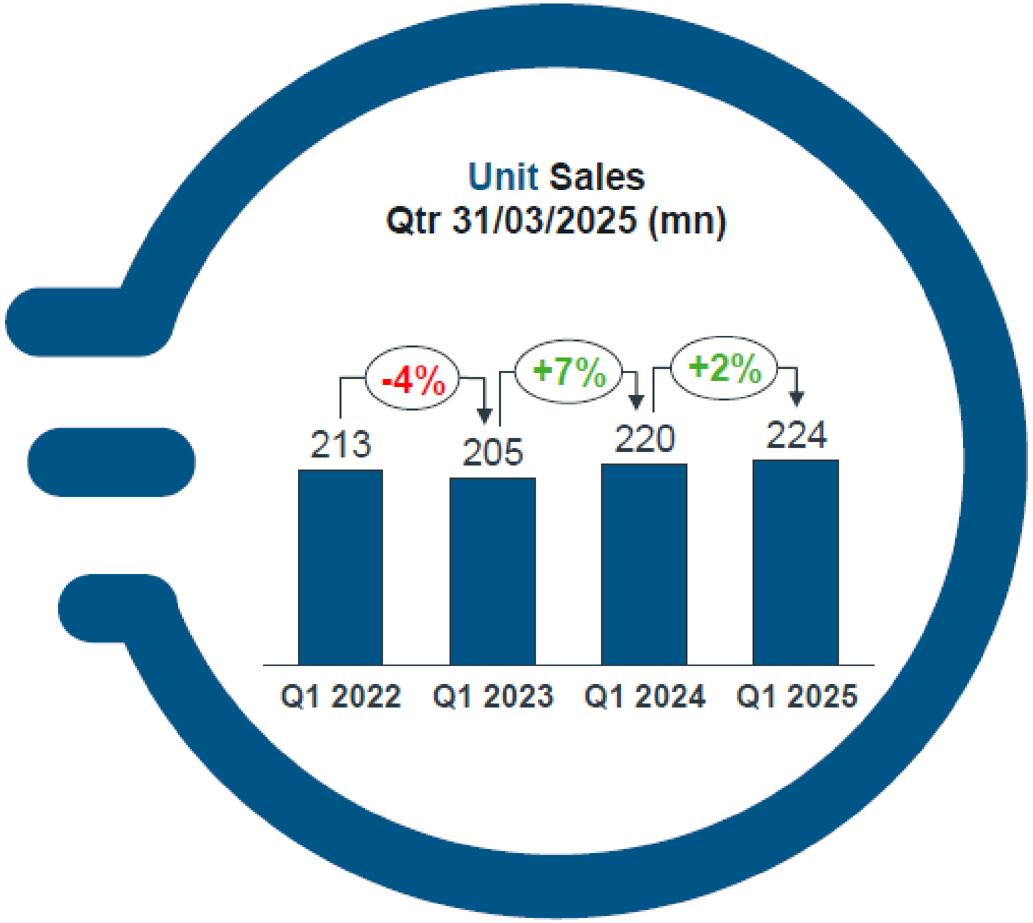
AGENDA

- CAM IN PHARMACY
- OUR HEALTH STATE
- AUSTRALIAN PHARMACY SNAPSHOT
- OPPORTUNITIES FOR CAM INTEGRATION
- EVIDENCE BASED CLINICAL ASSESSMENT
- SIX-STEP ACTIONS FOR BRAND OWNERS
- Q&A

CAM IN PHARMACY

Consumer health sales in pharmacy grew, but growth was slightly below last year, with a softer increase in consumption than Q1 2024





Source: IQVIA | AU Pharmacy Scan | QTR 31/03/2025
IQVIA | AU Consumer Health Snapshot | Q1 2025

IQVIA CONSUMER HEALTH

Lifestyle and beauty categories continue to top growth whilst Probiotics contributed to Vitamins and Supplements growth

Pharmacy Scan (Q1 2025)

Top 5 Growing Categories

		Growth vs LY Q1 Value	Growth vs LY Q1 Unit
1	SPORTS NUTRITION	+20.0%	13.9%
2	SMOKING CESSATION	+15.2%	7.2%
3	HAIR CARE	+14.8%	8.1%
4	BODY SKIN CARE	+10.6%	5.8%
5	VITAMINS MINERALS AND SUPPLEMENTS	+9.1%	3.0%

*Segment: Probiotics +18% value growth vs LY

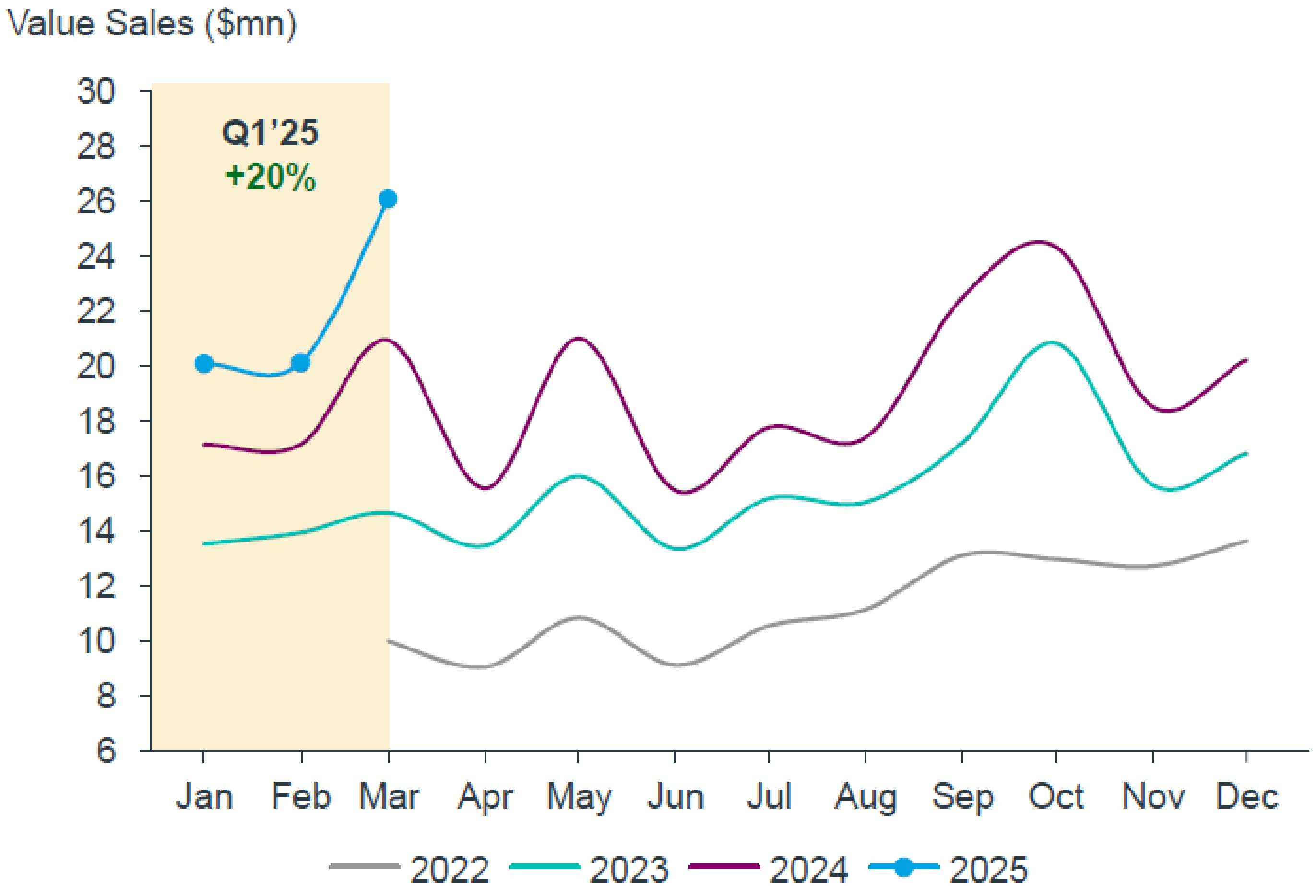
Source: IQVIA | AU Pharmacy Scan | QTR 31/03/2025 | Top 5 growing Categories out of Top 20 largest categories

Sports Nutrition sustained growth suggests an enduring lifestyle change, encompassing psychological and social well-being

Motivations for exercise participation, Australia, 2024

- **65%** Physical health or fitness
- **59%** **Fun / enjoyment**
- **53%** To lose weight / keep weight off / tone
- **44%** **Social reasons**
- **37%** **Psychological / mental health / therapy**

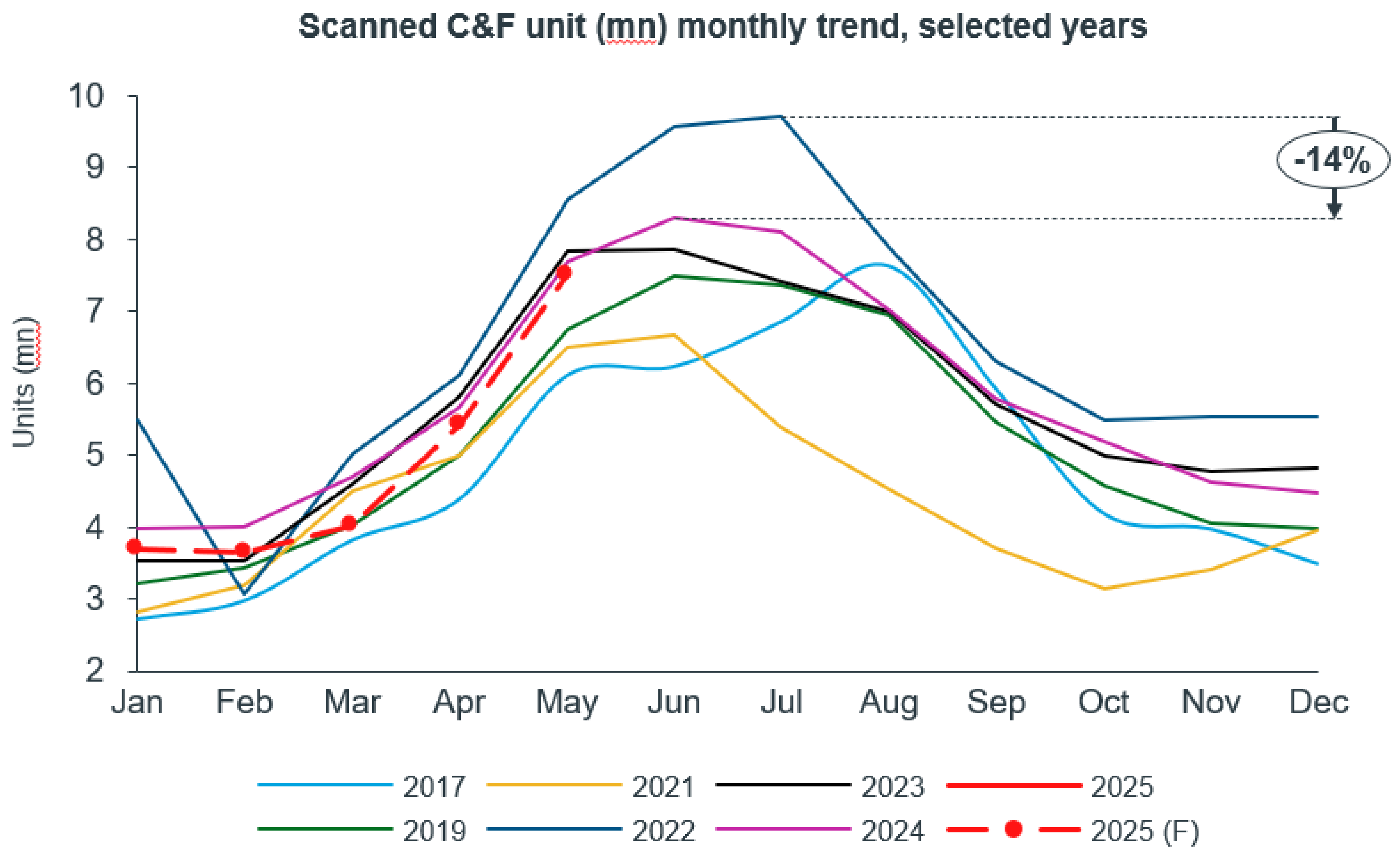
AU Scanned Pharmacy Sales, Sports Nutrition ($mn)



Source: IQVIA | AU Pharmacy Scan | QTR 31/03/2025 | AusPlay Survey, Jan-Dec 2024

C&F is expected to be milder this year

C&F



Insights

- Initial view suggest mild year
  - Children more affected for now
- 2024 was more potent than 2025
  - Potent years tend to be followed by milder years
- Inflation evident off slow demand
  - YTD '25 **$96 mn** (**-2%**)
  - YTD '25 units **7 mn** (**-6%**)

Outlook

- Typical for a milder after potent year
- May have knock-on effects for VMS, e.g. immunity, kids, energy

Source: IQVIA Scan, January 2025

HEALTH MEGA-TRENDS

YOUTHFUL AGING

PROACTIVE HEALTH

HEALTH EPIDEMICS

WELLNESS REVOLUTION

HEALTH IS WEALTH

OUR HEALTH STATE

OUR HEALTH (AIHW 2024)

We are seeing great improvements for coronary heart disease and cancer...

The **coronary heart disease** death rate (adjusted for age) has been falling since the late 1960s, and has **fallen** by more than 80% since 1980 – from 428 to 52 deaths per 100,000 population between 1968 and 2022. There was a slight increase between 2021 and 2022.

7 in 10 (71%)

people **survived** at least 5 years after a **cancer** diagnosis during 2015–2019 – an improvement from **5 in 10** (53%) in 1990–1994. Cancer death rates have **decreased** by 32% over the last 30 years (adjusted for age).

Leading causes of death in 2022:

1. Coronary heart disease
2. Dementia
3. **COVID-19**
4. Cerebrovascular disease
5. Lung cancer

Chronic conditions are an ongoing cause of substantial ill health, disability and premature death...

Dementia was one of the leading causes of **disease burden** in 2023, with the number of Australians with **dementia** predicted to **more than double** by 2058 (to 849,300 people).

In 2020–2022, 46% of **females aged 16–24** had a **mental illness** in the last 12 months. This was the highest rate for females, and higher than for males of any age.

Australian Institute of Health and Welfare (2024) Australia's health 2024: in brief, catalogue number AUS 249, AIHW, Australian Government.

WELLBEING EMPOWERED COLLECTIVE

BURDEN OF DISEASE – 61% HAVE 1 X CHRONIC DISEASE

38% WITH >2 CHRONIC DISEASES

RESPIRATORY CONDITIONS

MENTAL HEALTH

&

SUBSTANCE ABUSE

MUSCULO-SKELETAL, CV, CANCER

DEMENTIA

Leading causes of burden of disease:

1. coronary heart disease
2. dementia
3. back pain etc
4. anxiety disorders
5. chronic obstructive pulmonary disease

Causes burden throughout life course, esp. in children and elderly

Greatest burden in the first half of life course (5-44)

Leading burden in the latter half of life course (45-84)

Leading burden in OLDER Australians (+65) with cancer and CV disease. #1 death in females and #2 for males

Australian Institute of Health and Welfare (2024) Australia's health 2024: in brief, catalogue number AUS 249, AIHW, Australian Government.

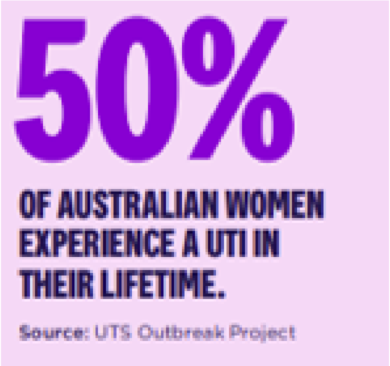
A HEALTHIER AUSTRALIA REQUIRES **ACCESSIBLE** AND **EQUITABLE** ACCESS TO HEALTHCARE….

- MULTI- DISCIPLINARY APPROACH
- FINANCIALLY AND GEOGRAPHICALLY ACCESSIBLE
- HEALTH PROMOTION AND PROACTIVE APPROACH
- HEALTH LITERACY IMPROVEMENT
- STIGMA REDUCTION OF DISEASES

Image source and reference: Nichols, T, McNamara, S, Pilot, C, Usmani, W, Johnson, T, Gill, T, Lalor, E, Calder R. Getting Australia's Health on Track 2024. Australian Health Policy Collaboration, Victoria University, October 2024. DOI: 10.26196/8jzknw04.

AUSTRALIAN PHARMACY HEALTH HUB

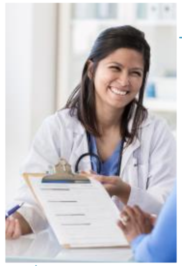
- 5935 community pharmacies in Australia
- 445 M visits per year. Average person visits a community pharmacy at least 18 x per year
- 97 % of Australians live within 2.5 km of a pharmacy
- Scope-of-practice pilot: pharmacists diagnose & prescribe for 17 conditions



2024 Pharmacy Barometer. https://www.uts.edu.au/about/faculties/graduate-school-of-health/pharmacy/what-we-do/pharmacy-barometer

A SNAPSHOT ON KEY SHIFTS

60-day medicine dispensing



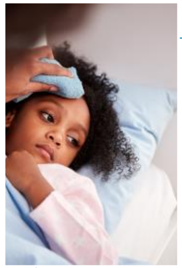
Increased scope for professional health services

E-scripts

Reduced PBS pharmaceutical co-payment

OTC changes:

- Paracetamol pack size restrictions (2025)
- Pseudoephedrine to BTC
- Codeine (2018)
- Cough suppressant pholcodine (2023)



Children's allergy and cough/cold medication

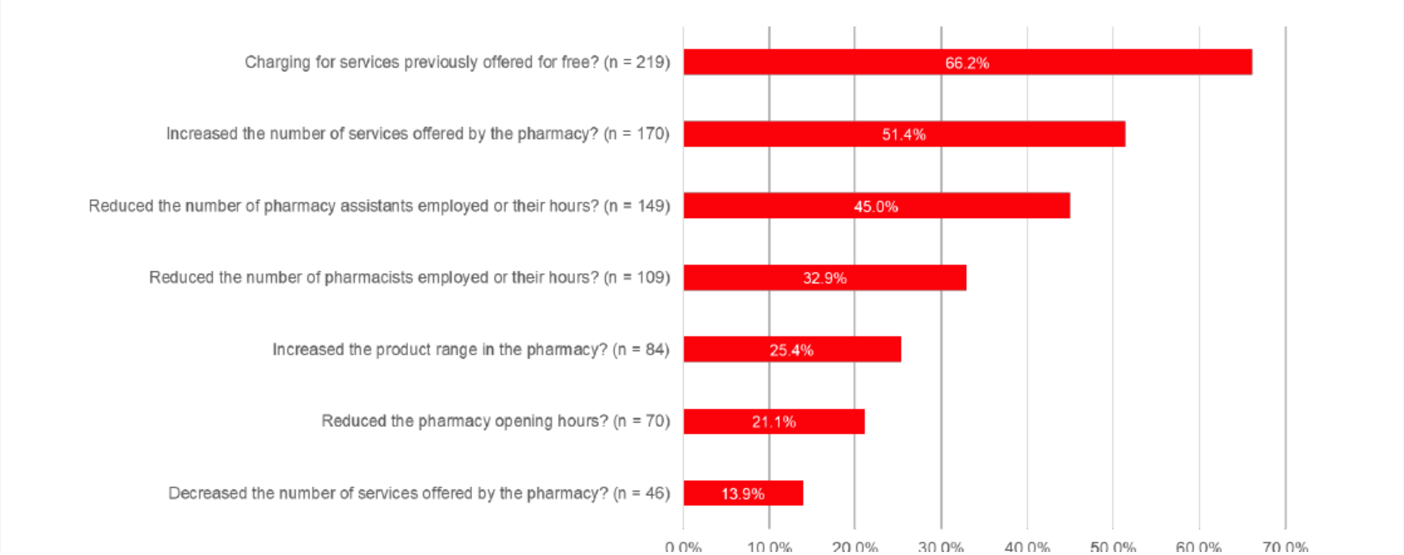
WELLBEING EMPOWERED COLLECTIVE

INCREASED REVENUE AND DECREASED OVERHEADS

In response to potential reduced foot traffic due to 60-day dispensing pharmacies implemented measures

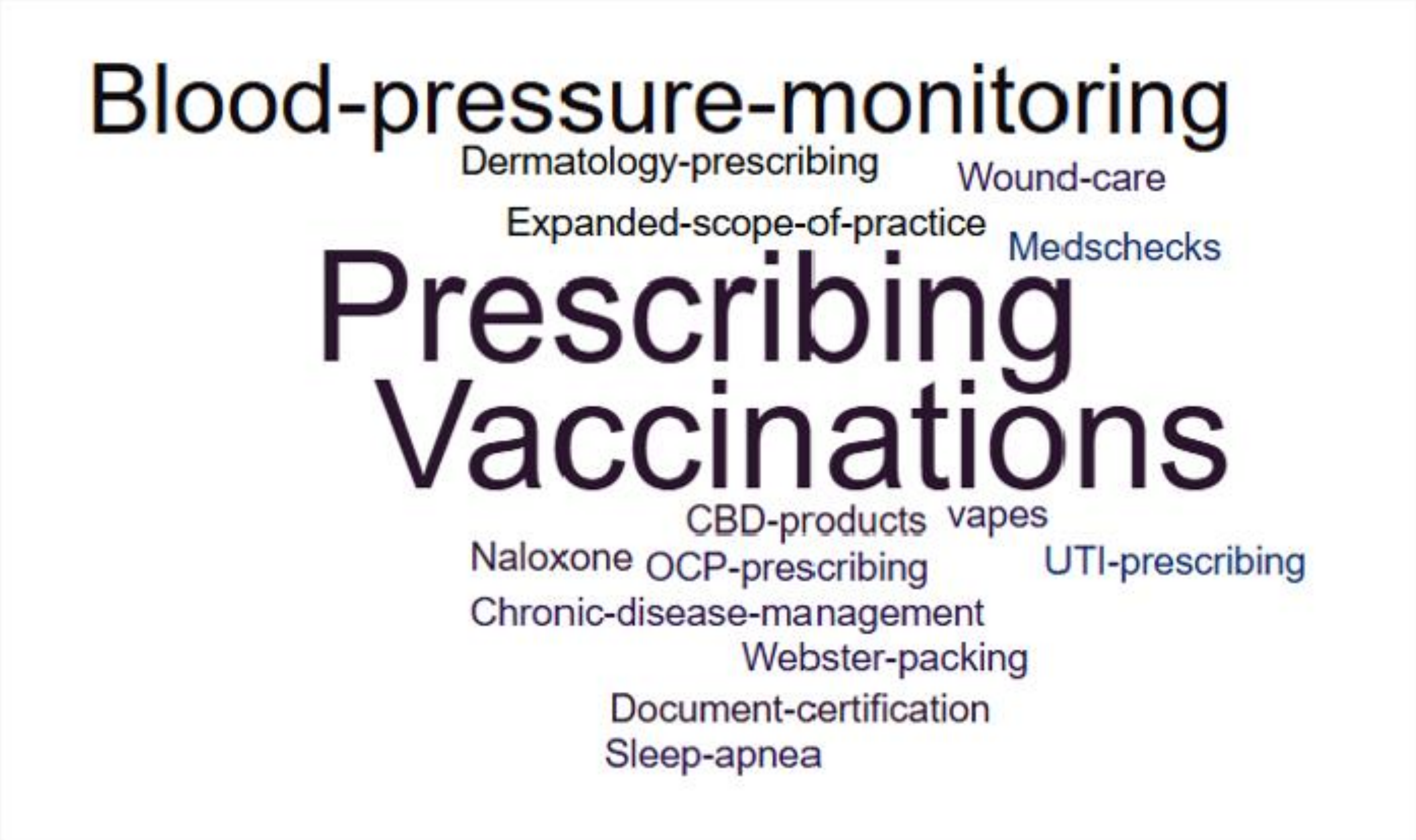
- Fee for services
- Increased services
- Increased products
- Reduced hours
- Reduced staffing
- Reduced services

Figure 8. Percentage of pharmacies that implemented strategies prior to the 8CPA as a result of 60-day dispensing, (Wave 14, N =360)



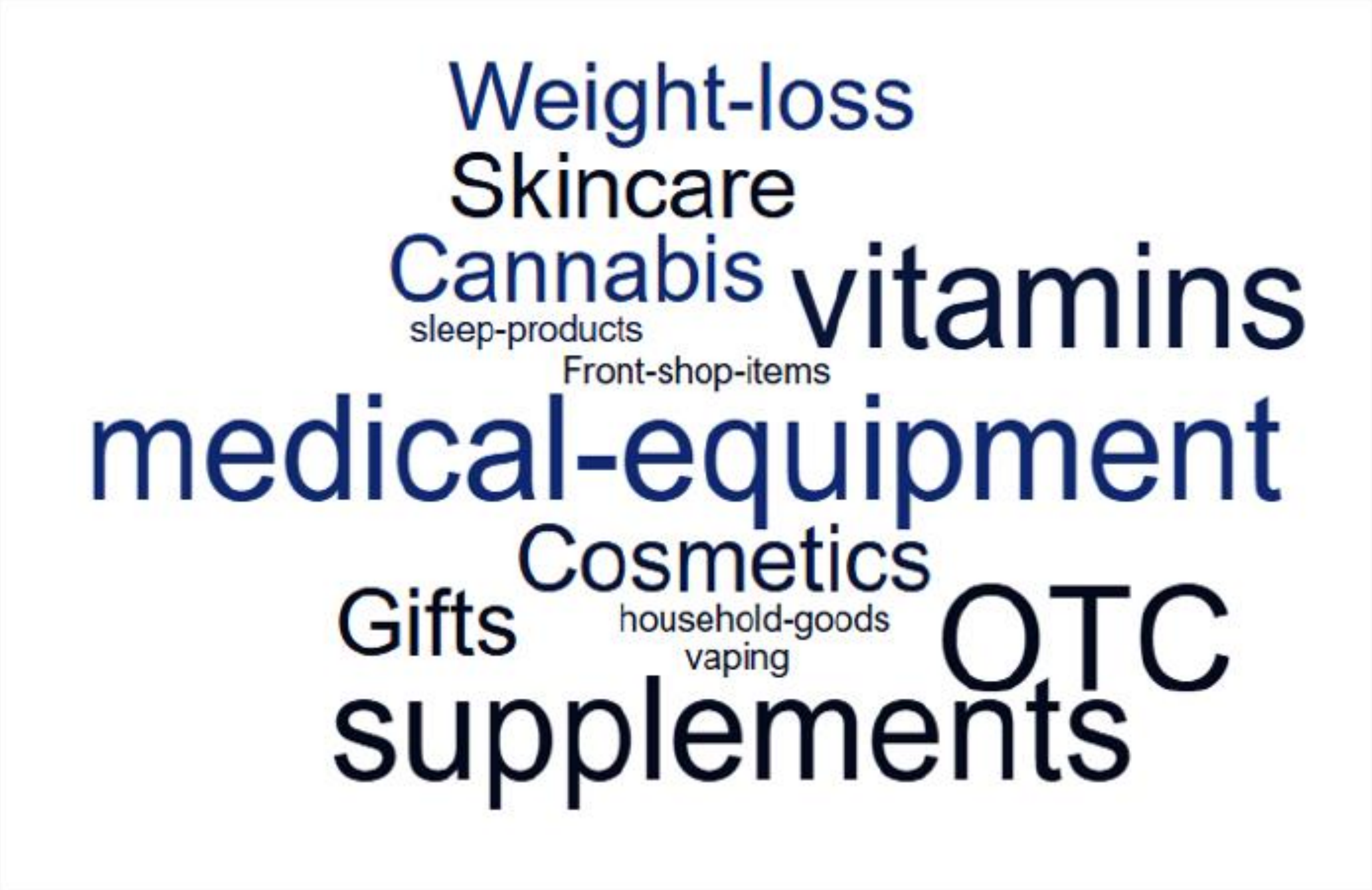
2024 Pharmacy Barometer. https://www.uts.edu.au/about/faculties/graduate-school-of-health/pharmacy/what-we-do/pharmacy-barometer

Prevalence of new services provided as a result of the 60-day dispensing policy



2024 Pharmacy Barometer. https://www.uts.edu.au/about/faculties/graduate-school-of-health/pharmacy/what-we-do/pharmacy-barometer

Figure 15. Prevalence of new products offered in the pharmacies as a result of 60-day dispensing



Note: n=84 decision makers replied yes and specified the product

2024 Pharmacy Barometer. https://www.uts.edu.au/about/faculties/graduate-school-of-health/pharmacy/what-we-do/pharmacy-barometer

HEALTH SERVICES

TerryWhite Chemmart

Our Brand Become a Network Partner Join t

Care Clinic

New pharmacy services and deeper consultations in the priv
clinic rooms to help you provide effective patient care.

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Vaccination
Skin
Women's health
Harm reduction & dependency
My medicines
Chronic conditions
Testing & screening

Everyday health

Your local community pharmacy is your go-to destination for everyday health needs. From coughs and colds to travel health and mobility care, your community pharmacists can do more for you with expert advice and effective treatments to help you stay healthy and active. Explore our range of services to keep your family well every day.

Absence from work certificates

Your community pharmacy can help verify your need for personal or carer's leave.

Find out more →

Coughs, colds & allergies

Get expert advice and effective treatments for coughs, colds, and allergies at your community pharmacy.

Find out more →

Eyes and ears

Visit your community pharmacist for advice and treatment options for common eye and ear issues,... including infections, blocked

Find out more →

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Health Services & Vaccinations

Time for a Vaccination or a Health Service?

Blooms The Chemist offers a range of services at your local community pharmacy.

NSW PHARMACY TRIAL

NSW GOVERNMENT

NSW Health

- COMMON SKIN CONDITIONS
  - Mild to moderate eczema
  - Shingles
  - Impetigo
  - Mild plaque psoriasis
- ✓ UTIS
- ✓ RESUPPLY OF ORAL CONTRACEPTIVE PILL
- FUTURE EXPANDED SCOPE OF PRACTICE:
  - Middle ear infection (Acute otitis media)
  - Outer ear infection (Acute otitis externa)
  - Acute minor wound management
  - Acute nausea and vomiting
  - Gastro-oesophageal reflux and gastro-oesophageal reflux disease (GORD)
  - Mild to moderate acne
  - Mild, acute musculoskeletal pain

WELLBEING EMPOWERED COLLECTIVE

PROFESSIONAL HEALTHCARE SERVICES

MedCheck
- Diabetes
- CV disease
- Aged care

Health Checks
- Chronic conditions
- BP monitoring
- Cholesterol screening
- Sleep apnoea

Minor Infections
- UTIs
- Ear infections
- Skin conditions
- Oral contraception

Prescriptions/ consultations
- Oral contraception
- Minor infections
  - UTIs
  - Ear infections
- Skin conditions

Vaccinations

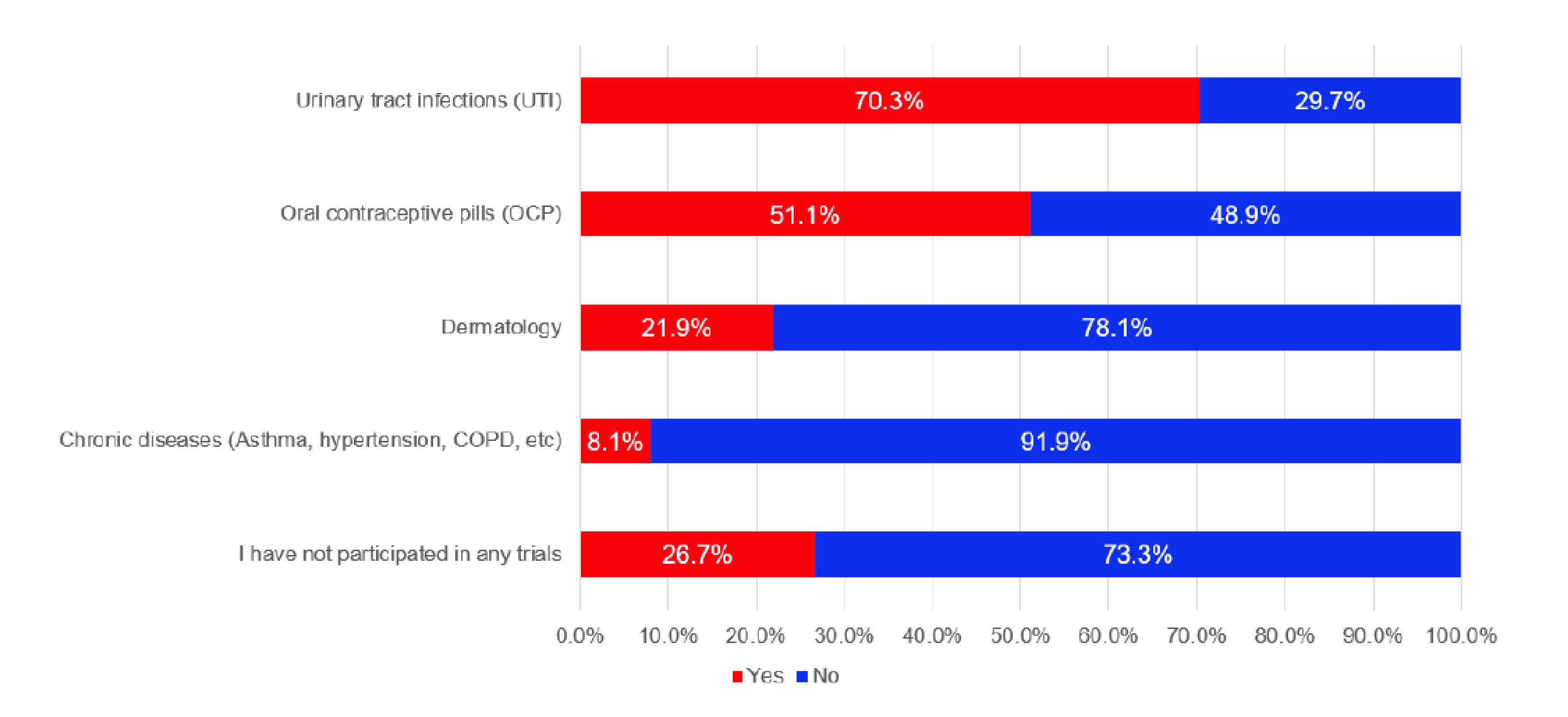
Medicine via injection

Wound care

Weight management

HEALTH SERVICES WILL DIFFER PHARMACY TO PHARMACY

Figure 23. Participation in pharmacy trials for the expanded scope of practice (all states)



N Wave 14=360

2024 Pharmacy Barometer. https://www.uts.edu.au/about/faculties/graduate-school-of-health/pharmacy/what-we-do/pharmacy-barometer

JOURNAL ARTICLE

Rural pharmacist and consumer perspectives of expanded pharmacy services to address inequity in accessing health services

Selina Taylor, Martina Mylrea, Jai-ann Eastaughffe, Rosemarie Dixon, Izabella Kent, Chloe Kappel, Beverley Glass

International Journal of Pharmacy Practice, Volume 33, Issue 1, January 2025, Pages 73–80, https://doi.org/10.1093/ijpp/riae061

Published: 11 November 2024 **Article history** ▾

CONSUMERS SUPPORT PHARMACY HEALTH SERVICES

- Diabetes, high blood pressure, high cholesterol, respiratory conditions and infectious diseases cited by pharmacists as most needed.
- Consumers saw highest need with mental health tests, alcohol/drug testing and diabetes.

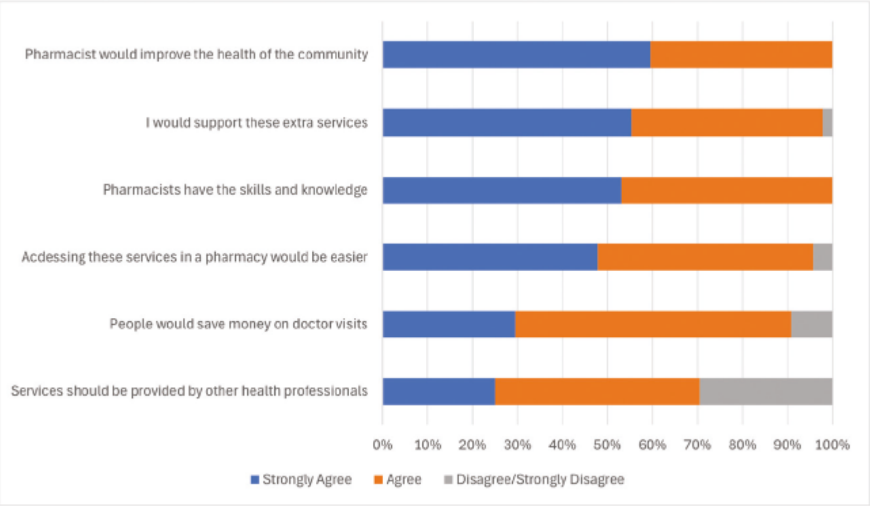


Figure 3. Likert-scale consumer responses to pharmacists and the provision of expanded services.

Table 2.
Identified health needs for all towns versus the identified expanded service by consumers.

Service	Reported as a health need (%)	Reported as a wanted expanded service (%)	% Difference
Mental health tests	75	41	34
Diabetes	60	56	4
Lung diseases	45	40	5
Heart attack/stroke	50	38	12
Alcohol/drug testing	70	38	33

Selina Taylor, Martina Mylrea, Jai-ann Eastaughffe, Rosemarie Dixon, Izabella Kent, Chloe Kappel, Beverley Glass, Rural pharmacist and consumer perspectives of expanded pharmacy services to address inequity in accessing health services, *International Journal of Pharmacy Practice*, Volume 33, Issue 1, January 2025, Pages 73–80, https://doi.org/10.1093/ijpp/riae061

OPPORTUNITIES FOR CAM INTEGRATION IN PHARMACY HEALTH CARE

ADDRESSING SPECIFIC RX TEAM NEEDS AND NETWORK OF HCPS IS CRITICAL

RETAIL STAFF

- Pharmacist
- Buyer
- Allied health
- Pharmacy assistants

CONSUMER

- Proactive
- Reactive

HCP NETWORK

- Doctors
- Natural health
- Allied health

WELLBEING EMPOWERED COLLECTIVE

CAM INTEGRATION – POTENTIAL

MedChecks and chronic disease monitoring:	Magnesium with PPIs CQ10 or Ubiquinol with cholesterol medications and elevated blood pressure Omega 3 for blood pressure Cranberry and hydration with UTIs Probiotics
Health focused clinics	Sleep clinics ⟶ Sleep support medications, respiratory health, allergies Diabetes clinic – other chronic care
Vaccination:	Immune support, proactive care for winter seasons Kid cough meds
Travel:	Probiotics Preventative care

WELLBEING EMPOWERED COLLECTIVE

EVERY POINT OF INTERACTION IS AN OPPORTUNITY

WELLBEING EMPOWERED COLLECTIVE

COMMUNICATIONS STRATEGY

- Clinical relevance & value
- Evidence-based differentiation
- Consumer centric benefit
- Confidence in prescribing
- Ease

WELLBEING EMPOWERED COLLECTIVE

ASSESSING THE PRODUCT VALUE


What is the risk?


What is the benefit?


Is it accessible?


Does it support practice guidelines?


Is there demand?


What value is provided?

BUILDING CONFIDENCE

- QUALITY manufacturing
- Educational support
- Clinical evidence
- Product selection
- Drug interactions
- Safety/ Toxicology
- Contraindications & cautions

CLINICAL ASSESSMENT FOR A NEW MEDICINE

01

Clinical relevance:

Is the new product an improvement over the product we currently use?

02

Clinical void:

Does the new product fill a true clinical need?

03

Cost:

Is the cost more or less than the product we currently use?

04

Extra costs:

Are additional charges for product improvements worth the cost?

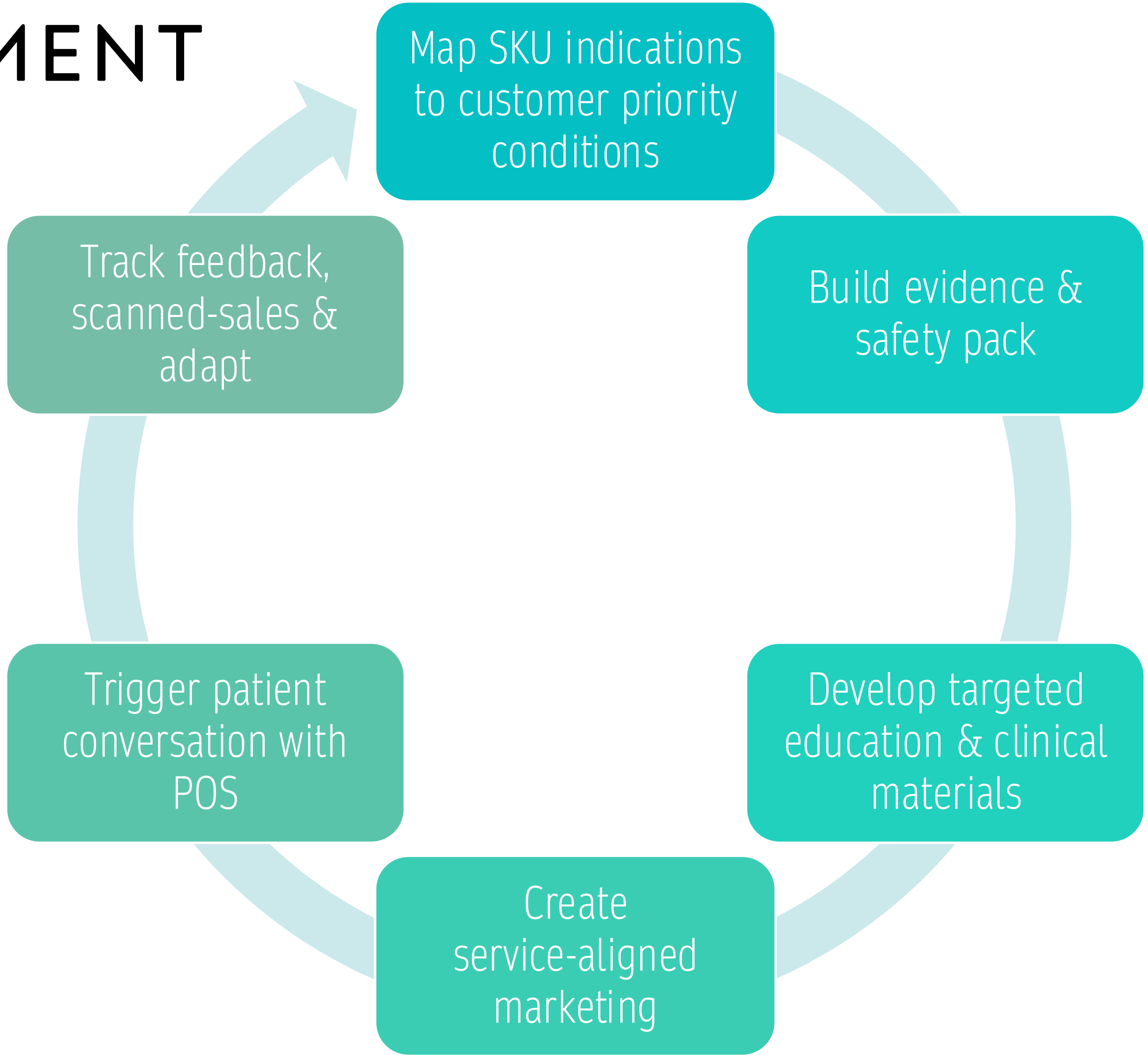
05

Safety:

Does the new product offer better safety features?

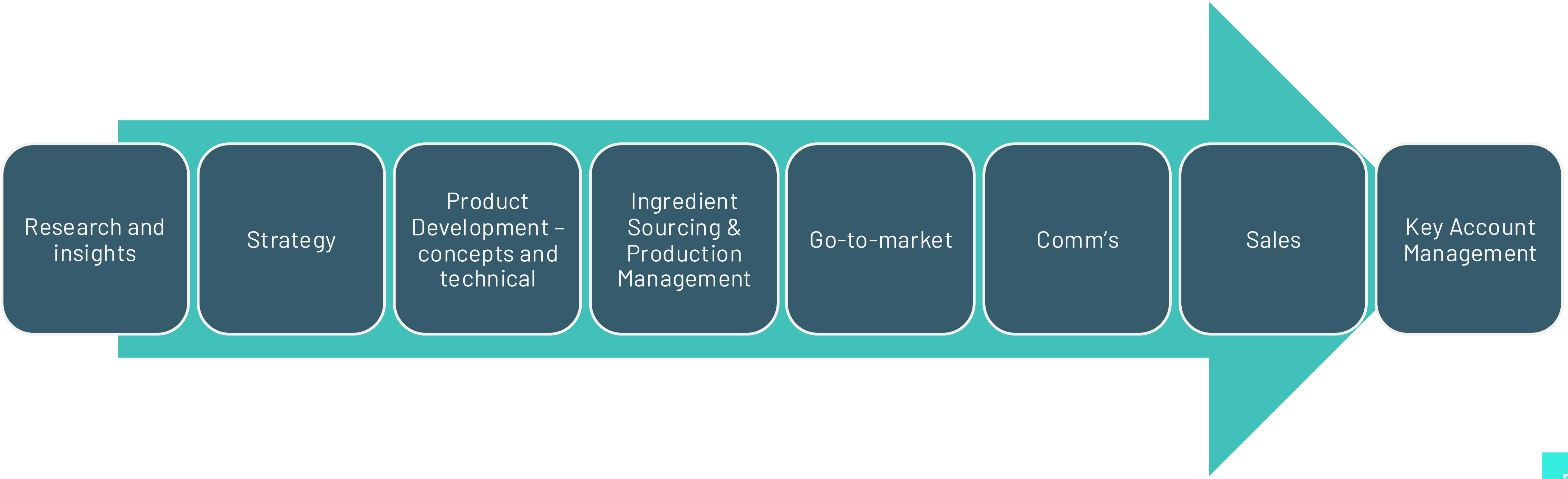
Reference: https://www.myamericannurse.com/applying-a-systematic-approach-to-new-product-assessment-2/

KEY ELEMENTS FOR HCP AND CLINICAL ASSESSMENT



Let’s explore your business opportunities

- Regardless of where you are at, we can help.
- Contact us for a no-obligation exploratory meeting to review your business and needs



Making Natural Health Easy

Strategy to implementation

Concept and Product Development – GTM – Marketing and Communications - Business development – Sales

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DESPINA LORD

PRINCIPAL CONSULTANT

- +30 YEARS EXPERIENCE IN CAM INDUSTRY AND FOODS
- SPEAKER, NATUROPATH, HERBALIST AND NUTRITIONIST
- EXTENSIVE BUSINESS DEVELOPMENT FOR RETAIL, PRODUCT AND HEALTH SERVICES
- COMMERCIAL, SALES, MARKETING, TECHNICAL, NPD, EDUCATION, KOL SOURCING AND COACHING
- BIG AND SMALL BRANDS
- PUBLISHED AUTHOR