



Make selfcare products a lever for resilience and access to proximity care in France

Afipa at a glance

Founded in 1972, Afipa currently brings together **29 pharmaceutical companies** which commercialise selfcare products (over-the-counter (OTC) medicines, medical devices and/or food supplements) sold in pharmacies. They contribute to the health of 80% of the French people who use selfcare products every year.

Afipa's member pharmaceutical companies, whose production is mainly located in France and in Europe, ensured the continuous production, supply and distribution of selfcare products to serve both patients and healthcare professionals throughout the duration of the COVID-19 health crisis, whilst maintaining maximum safety for their employees.

Indeed, the selfcare products sold by Afipa's member pharmaceutical companies in France are mainly produced in France and in Europe.

Afipa's vision: selfcare products dispensed and secured by the pharmacist and his team, are considered as an integral component toward preserving and improving the health of the French people.

Afipa's mission: to develop and guarantee a framework and an environment supporting the recognition of selfcare products in preserving and improving the health of the French people. Our mission is conducted in compliance with all applicable regulations, with the support and impulse of our member pharmaceutical companies, and in collaboration with the pharmacists and the authorities.

Afipa's values: ethical behaviour, responsible approach (including from an environmental perspective), attention to the safety of patients and the appropriate use of selfcare products, co-construction and partnerships with relevant stakeholders and initiative in making constructive proposals.

List of Afipa's member pharmaceutical companies at 24 September 2020:

Bayer, Boiron, Cooper, Expanscience, Laboratoires Genevrier, Gifrer, Laboratoires Gilbert, GSK, HRA Pharma, Ipsen, Johnson & Johnson, Laboratoire de l'Abbé Soury, Laboratoires Lehning, Laboratoire Marque Verte, Mayoly Spindler, Melisana Pharma, Perrigo, P&G, Pfizer, Pierre Fabre, Laboratoire PiLeJe, RB, Laboratoire Bouchara Recordati, Sanofi, Therabel, UPSA, Urgo, Weleda, Zambon.

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Edito

Dear readers

As France and the world is facing a major health crisis, the French Pharmaceutical Industry Federation for Responsible Self-Medication (Afipa, Association Française de l'Industrie Pharmaceutique pour une Automédication responsable) aims to draw lessons of the first wave of Covid-19 epidemic in order to reshape the healthcare system in France, in particular in terms of access to primary care.

Our analysis is based on two **surveys conducted in the wake of this crisis**. These surveys detail the **expectations of patients, as well as those of pharmacists**, in terms of access to selfcare products.

Several Afipa member testimonials complete our analysis, and emphasise the unprecedented mobilisation of their companies to help during the crisis. These companies were able to rely on their teams and manufacturing plants to ensure the continuous production, supply and distribution of selfcare products through pharmacies, all over the country.

This analysis is a starting point for a more general reflection on the organisation of the healthcare system, the role of community pharmacists and the contribution of selfcare products in the healthcare offer in France.

The health crisis has also placed the topic of resilience at the centre of discussions on the French healthcare system. The strong collaboration between the community pharmacists and our companies has contributed to this resilience, in particular by reducing the number of visits to emergency services and general practitioners (GPs), who were overloaded during the peak of the epidemic.

Our objective is to move things forward by making proposals to make primary care in pharmacies a strong pillar of the French healthcare ecosystem. This is why, as we publish this document, we are making several recommendations to the French public authorities, in order to:

- Define a pharmacy-based healthcare pathway, relying more importantly on the expertise of community pharmacists to reinforce a safe and supervised access to primary care and selfcare products.
- Reinforce the appropriate use of selfcare products.
- Enhance the contribution of selfcare products available in pharmacies within the healthcare offer.
- Recognise the value of and promote selfcare production capabilities in Europe and in France.

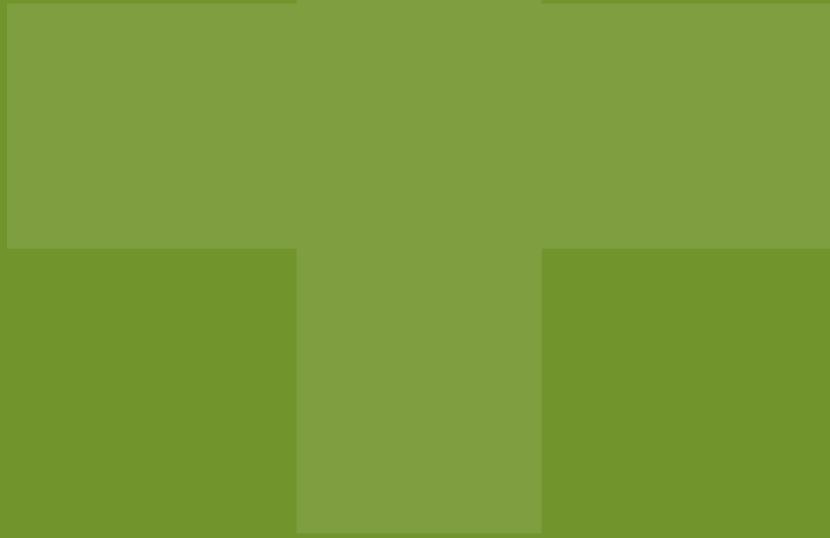
Our ultimate goal is to consolidate the resilience of the French healthcare system, by providing a larger access to primary care and selfcare products through pharmacies.

We hope that this document will contribute to launching an in-depth reflection on the place of selfcare in the French healthcare pathway, and on the predominant role of community pharmacies.

I wish you a pleasant reading,

Christophe de la FOUCHARDIERE,

President of Afipa





The contribution of selfcare products to the healthcare process in France - outside of health crisis situations

Selfcare products help patients ensure their daily care within a secured framework, and constitute an integral component of the local supply of healthcare.



Selfcare products: definition



The French Pharmaceutical Industry Association for Responsible Self-Medication (Afipa) **defines selfcare products as products dispensed without a prescription in pharmacies**, to prevent or treat a symptom or disease.

Selfcare products may have different statuses, such as:

- **Over-the-counter medicines (hereafter OTC),**
- **Medical devices (MD) / in vitro diagnostic medical devices (IVDD),**
- **Food supplements.**

The safety of selfcare products is guaranteed **by the control of public authorities**. For medical devices which may bear a risk for patients, assessments are conducted by notified bodies under the control of national authorities, before these medical devices are marketed.

For Afipa, the use of selfcare products is part of a general approach, in which individuals actively take care of their own health and well-being, supported by the advice of the community pharmacist and his team.

This approach, referred to as “selfcare”, emphasises the patients’ more active role in managing their own health capital.

Selfcare products available in community pharmacies



OTC
medicines

+



Medical
Devices

+



Food
Supplements

Not prescribed and not reimbursed

Throughout this document, the data related to selfcare products excludes products prescribed by a doctor or any other healthcare professional.

Primary care and selfcare products in pharmacies

Primary care in community pharmacies is part of an integrated healthcare pathway, within a comprehensive healthcare and prevention approach. This type of care and the dispensing of selfcare products rely on the expertise of pharmacists and their teams.

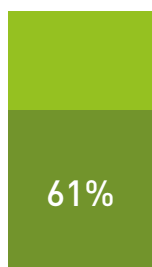
$$\begin{array}{c} \text{Selfcare products} \\ + \\ \text{Community pharmacist expertise} \\ = \\ \text{High-quality and secured selfcare and primary care} \\ \text{in community pharmacies} \end{array}$$



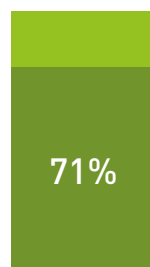
The pharmacist's role is essential to ensure the appropriate use of over-the-counter medicines and the safety of patients: **66% of the patients** who visit a pharmacy for primary care seek the pharmacist's advice to select the product best adapted to their health issue and personal profile.

When a patient asks for a specific product, the pharmacist recommends a medicine with a different active ingredient in 22% of the cases. (1)

The role of selfcare products in the care pathway: example of pain management (2)



61% of the patients suffering from pain use selfcare products as first-line treatment.



For 71% of them, the pain disappears following the use of selfcare products.

The advice of community pharmacists and their involvement in the management of minor ailments also reduce the number of medical consultations and thereby free up consultation time.

Key numbers / selfcare products structure the French healthcare system and are all-important to patients, in a regular situation

Products which are essential for the health of the French people

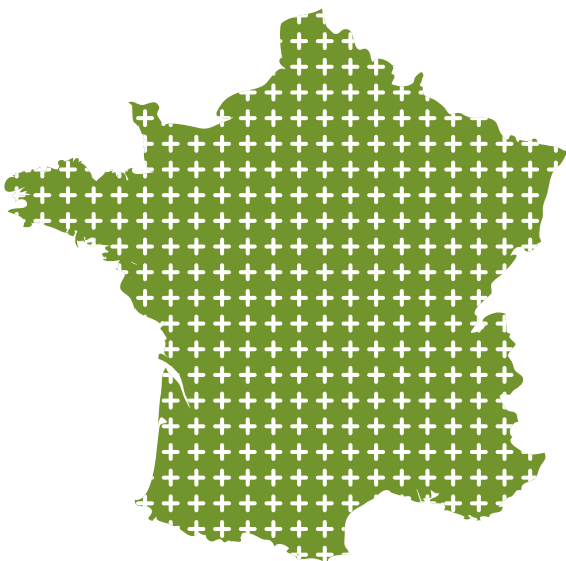


Over 30 active pharmaceutical ingredients corresponding to over 2,500 OTC medicines commercialised in France in 2019 are on the World Health Organization Model List of Essential Medicines (3). This highlights the essential role of selfcare products in therapeutic strategies.



79,938 different selfcare products are sold in **community pharmacies in France** (4). This offers a wide choice to best meet the needs of the patients and their pathologies.

Guaranteed access via an extensive network of community pharmacies, covering effectively both rural and urban areas.



Selfcare products are available nationwide through a network of **21,425 pharmacies** in mainland France and overseas territories (5). This corresponds to **32 community pharmacies per 100,000 inhabitants** (6), of which **1/3 are established in small communities with fewer than 5,000 inhabitants**. Pharmacists are among the healthcare professionals best distributed all over the country (7).

On average in 2019, each pharmacy received **40.6 visits per day** for the purchase of selfcare products, i.e. a total of **310.7 million visits to pharmacies over the year**. (8)





Access to selfcare products is further increased through the **704 online pharmacies** established in France. This enables patients who wish to do so to purchase OTC medicines on line, under the control of pharmacists. (9)

A healthcare and prevention solution used by many French people, yet it is still not included in governmental healthcare and prevention policies.



80% of the French people go to a community pharmacy at least once a year to purchase selfcare products. (10)



432.6 million OTC medicines are purchased in pharmacies every year without a prescription. (8)

An affordable health and prevention solution



On average, each French person spends €33.50 per year on selfcare products. This is **below the European average of €45.80 per year.** (8)

Furthermore, the prices of selfcare products in France are among the lowest in Europe.



The prices of selfcare products have been stable over the past 5 years (+0.5% for OTC medicines, +0.3% for medical devices and -0.1% for food supplements) while inflation was 1% over the same period. This highlights the **responsible behaviour of the producers and pharmacists, to ensure that these products remain affordable.** (8)

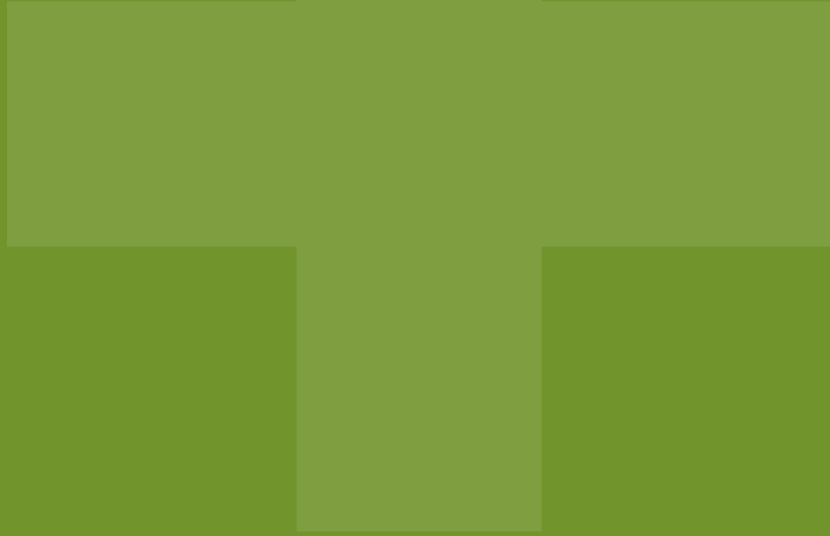
A significant contribution to the economy



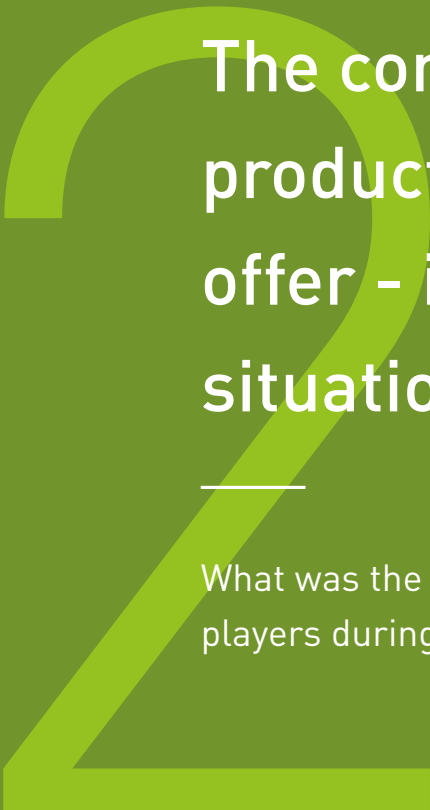


Selfcare products delivered without a prescription represent on **average 10% of a pharmacy's total turnover, i.e. €3.7 billion in total** for all pharmacies in France over one year. (8)



The selfcare products sector employs **25,000 people** who ensure that patients' needs are met and their safety is guaranteed. (11)





The contribution of selfcare products in the healthcare offer - in health crisis situations

What was the role of selfcare products and players during the health crisis?



The predominant role played by the pharmaceutical companies, at the forefront of the mobilisation

A majority of the selfcare products commercialised in France by Afipa's member pharmaceutical companies are produced either in France or in Europe. Thanks to the strong territorial anchoring of their production facilities, these pharmaceutical companies were particularly agile in manufacturing their products throughout the crisis.

Some of them adapted their factories to manufacture products which were in shortage at the beginning of the pandemic (by switching to other productions, to other products, etc.).

Others also changed their production lines to secure the supply of selfcare products to France, in particular products specifically needed to deal with the Covid-19 epidemic, such as hand sanitiser.

Certain pharmaceutical companies also donated basic necessities or made financial donations.



Thus, despite a **sales peak of + 8.3 million in OTC medicines unit sales** during the week of 16 to 22 March 2020, i.e. an 82% increase in sales compared to 2019, the **mobilisation of the 25,000 employees** of our member pharmaceutical companies made it possible to meet the patients' exceptional demand **without any stock shortage or disruption in supplies**.

Exceptional initiatives by our member pharmaceutical companies in response to the health crisis

1. They ensured the continuous supply of selfcare products



Vincent Cotard

Managing Director

Sanofi Santé Grand Public France



"We adapted our production very quickly to respond to the sudden increase in demand for paracetamol at the beginning of the epidemic. Indeed, as soon as the crisis began, we increased by 50% the production capacity of our factory in Lisieux. In addition, we doubled every day the production at our Compiègne manufacturing site. Finally, our distribution sites in Amilly and Saint Loubès doubled their activity to prepare and deliver orders as quickly as possible. During this period our employees worked on a voluntary basis and we implemented all measures and barrier gestures to ensure their safety on our sites."

The sales and head office teams also made a major contribution to this collective effort to meet the large orders for paracetamol. In concrete terms, at the height of the crisis, we were able to produce 1 million boxes of paracetamol per day. In normal times, we produce 300+ million boxes of all of our products combined per year.



Fabrice Dal-Mas

Managing Director

UPSA France

"The UPSA Laboratory contributed very quickly to the national health crisis effort by mobilising all of its employees - who felt directly concerned by the unprecedented situation - and by adapting the production lines of our Agen site to meet the very high demand for paracetamol, a treatment deemed essential to treat the symptoms of Covid-19.

The sales and head office teams also made a major contribution to this collective effort to meet the large orders for paracetamol. In concrete terms, at the height of the crisis, we were able to produce 1 million boxes of paracetamol per day. In normal times, we produce 300+ million boxes of all of our products combined per year.

And our contribution did not stop there. At local level, we contributed to collective solidarity by distributing, for example, 1,000 masks to the Petites Soeurs des Pauvres (Little Sisters of the Poor) retirement home. We donated 20 litres of hand sanitiser to the EFS (Etablissement Français du Sang, the French Blood Establishment) in Agen. We also contributed to the making of over 3,500 cloth masks by supporting a local sewing workshop. During the entire period of confinement, we offered our employees two days every month, during working hours, to give them the possibility to contribute to the activities of a charity of their choice. We are currently discussing with our social partners the possibility to extend this initiative, as it was greatly appreciated by the associations as well as by our employees."

2. They adapted and increased the production of hand sanitisers to meet the unprecedented needs triggered by the health crisis



Virginie Pietrowski

Production Manager
Laboratoires Lehning

"Right from March 20th and President Macron's announcement, we knew this was an emergency situation and we decided to adapt our liquid production line in order to produce hand sanitisers. At Lehning Laboratories, we had a large stock of pharmaceutical alcohol at our disposal, and thanks to the strong mobilisation of our employees, we were able to produce over 130,000 bottles

of hand sanitiser on our site during the weeks of confinement.

These bottles were offered for free to the hospitals in Eastern France (the "Grand Est" region) which was particularly impacted by the pandemic, and to health and prevention professionals, public administrations, hospices, town halls and other local structures in need.

Our employees are proud to have concretely shown their solidarity and to have supported, in their own way, the "war effort" mentioned by the President of the Republic".



Sébastien Lucot

CEO
COOPER

"The Cooper Laboratory, one of the major producers of hand sanitiser in France, mobilised its forces from the very beginning of the crisis by strongly increasing its hand sanitiser production capacities, in order to meet the unprecedented demand linked to the pandemic. The company was at the heart of the healthcare effort during the 1st wave of the Covid-19 crisis. The exceptional

dedication of our teams and partners enabled us to multiply our production capacity by 4. The Cooper Laboratory is proud to have also donated 80,000 litres of hand sanitiser to hospitals thanks to a partnership with Pernod Ricard".



Julien Zeller

Chief Operating Officer Rheumatology and Dermatology
Laboratoires Expanscience

"As a health care company, we wanted to contribute to the national momentum of solidarity in the fight against the Covid-19 pandemic. At Expanscience, we mobilised the expertise of our R&D and production teams to develop and produce hand sanitiser. Our employees set to work with a great deal of commitment in order to see this exceptional project through.

We produced over 10,000 liters of hand sanitiser, allowing us to help the APHP hospitals and maternity wards, our pharmacist customers and stakeholders in the Eure-et-Loir department, where we have maintained strong local roots for 70 years.

During this period, we also launched several initiatives to support our audiences and reinforce our relevance. As such, we offered those suffering from osteoarthritis free coaching and advice through #EnMouvementTousEnsemble, in order to help them maintain regular physical activity during this period of reduced mobility.

Finally, because open and collaborative innovation is even more essential in these situations of interdependency, we joined the "Health Innovation Coalition - Health Crisis" to support its call for projects from start-ups, SMEs and ETIs (mid-size companies) to find solutions for maintaining the care path and management of patients suffering from chronic diseases."

3. They donated products and took specific initiatives



Astrid Ziebart

President

Johnson & Johnson Santé Beauté France

"Johnson & Johnson in France actively participated in the unprecedented national effort to support care professionals and the people most vulnerable to COVID-19. In its commitment to stand by the care professionals, patients and populations in need, J&J donated 853,000 hygiene and healthcare products of its brands, representing a market value of 2.8 million euros. These products were distributed to national charities and hospital foundations throughout France.

J&J also made 1 million euros worth of financial donations, distributed to the Women's Foundation, the Samu Social, the UNAPEI and Banlieues Santé. All of these initiatives are part of J&J's DNA and represent the strong values of our company."



Jean-Claude Bacos

Managing Director

Bayer Consumer Health France

"Bayer's early mobilisation took place right at the beginning of the crisis by making a donation of 1 million euros to the "All against the coronavirus" coalition ("Tous unis contre le coronavirus"), which gathers the Fondation de France, the AP-HP, and the Pasteur Institute. Bayer's financial donation enabled the coalition to launch projects such as the deployment of direct, immediate psychological assistance and information about the crisis dedicated to the patients and their

families as well as to the healthcare professionals. Bayer also supported researchers for the development of protocols to better understand the coronavirus and ongoing pandemic, of tests to detect antibodies against the virus in the population, of effective treatments and finally of a future vaccine against the coronavirus".



Romana Jourden

Vice-President and regional director for France and Iberic area

Laboratoires GSK

"At the peak of the pandemic, GSK Santé Grand Public in France acted proactively to support various healthcare players who demonstrated their heroism during the most difficult period. We donated 7,000 doses of moisturiser to hospital pharmacies in several health establishments, to care the hands of caregivers damaged by repeated washing.

In June we also launched the "Thank You to My Pharmacist" campaign: [click here](#) to thank pharmacists for ensuring the supply chain and for having meets the needs of their customers during the crisis. Pharmacists had to adapt quickly to the new reality having installed the necessary protective equipment, having trained their teams, having adjusted their working hours. Today, on behalf of GSK France, I would like to say once again THANK YOU to all pharmacists and healthcare professionals for their extraordinary courage and mobilisation!"



Antoine Bon

CEO

Laboratoires Urgo

"The Group URGO became aware very early of the exposure of healthcare professionals to Covid-19. We are very proud to have supported the firemen of Paris and Burgundy. Also, we provided solutions for healing skin of health professionals irritated by the extended wear of the mask. We supported hospitals by providing them hand sanitiser made in our factories in France.

Above all, we were very touched by the deep concern felt by pharmacists and the fact they were often forgotten. That is why in partnership with the pharmacists' unions: FSPF, USPO, the International Humanitarian Pharmacy association received a donation of one million surgical masks from URGO Healthcare Laboratories. These masks were distributed in 21,000 French pharmacies for the use by pharmacies teams who are our long-time partners.

URGO Healthcare laboratories and their employees have been very touched by the courage of these healthcare professionals, on the front line of the epidemic. This operation was their way of expressing their gratitude.

This period reinforced our health mission, we are committed at the heart of our society, as close as possible to the needs of patients and health professionals."



Aurélia Livet

General Manager

IPSEN Consumer HealthCare France

"During the health crisis, Ipsen Consumer HealthCare's employees were strongly mobilised to maintain the supply of our health products from our manufacturing sites in Dreux and Isle sur la Sorgue, which supply the entire world. In addition, Ipsen has launched innovative initiatives such as a web radio for patients but also volunteer work to support distance learning for children. Ipsen has also donated two million euros to Institut Pasteur to help the research for a COVID-19 vaccine. All these actions have led to a real sense of pride for all our teams! "

"



Stéphane Grenon

President

P&G Health France

"Facing with the health crisis, Procter & Gamble and its brands are mobilising for the long term.

The coronavirus pandemic has reminded us of the essential nature of health and hygiene products, in our daily lives but also for the health of us all. It has also generated a real surge of solidarity with the most disadvantaged. Faced with this unprecedented situation, Procter & Gamble (P&G) – which

includes P&G Health - and its brands mobilised through a support plan for health authorities, healthcare professionals and the most vulnerable people. From the first lockdown, every week, nearly 100,000 P&G products were distributed to our historical partner Dons Solidaires®, a gateway association to hundreds of associations throughout France. This significant donation has made it possible to provide cleaning, health and hygiene products to those who need most. P&G decided to continue its commitment with Dons Solidaires® association until the end of the year.

Nearly 3,000 metric tons of hand sanitiser were also produced in P&G plants to supply health structures such as hospitals, doctors' offices, retirement homes and nursing homes near our plants of Amiens and Blois and our Dijon site.

Our pharmaceutical company P&G Health France has also decided to support the French Red Cross in its mission of protection, prevention and health and social action through sponsorship and donations of healthcare products.

A huge thank you to the French Red Cross, Dons Solidaires, who are doing everything possible to respond to this long-lasting crisis; not forgetting our P&G Health employees, who continue to serve our pharmacist customers every day to improve the lives of patients and consumers."

4. They provided support to local communities



Virginie Hannel

OTC Marketing Director France
Pierre Fabre Pharma Care

"To face this unprecedented health crisis, the Pierre Fabre Group adapted very quickly to ensure that patients and consumers have access to their essential products and to support the healthcare professionals in their fight against Covid-19. The supply chain was reorganised in order to prioritise the availability of major therapeutic products and essential hygiene and healthcare products.

To achieve this, we mobilised 1,000 employees at 7 production sites and 3 distribution sites in France, while ensuring their safety through the implementation of appropriate measures. In three weeks, we reorganised certain production sites to produce hand sanitiser by adapting our production lines usually dedicated to shampoos. Fifty tons of hand sanitiser were distributed in France late March and we were able to offer hand sanitisers to hospital care professionals and community pharmacy teams. In addition, as soon as end of March, tens of thousands of personal protection items were distributed to over 70 hospitals, clinics, retirement homes, medical centers and fire brigades. In total, 25,000 masks, 12,000 gowns and 10,000 over-shoes, gowns, gloves and soaps were distributed.

We also donated over 10,000 units of sprays and creams to hospitals in the Occitanie region [South Western Region], to soothe faces irritated by masks and hands damaged by hand sanitiser. Finally, 40,000 samples of moisturising cream were given to pharmacists to repair skin damaged from wearing masks or intensive hand washing."



Sophie Malichecq

Development, Strategic Marketing and Communications Director
Laboratoires Genevrier

" Since the start of the COVID-19 pandemic, medical staff, who were first in line, constantly had to adapt to the situation with strict hygiene measures: wearing a mask, overalls, gloves as well as the repetitive application of hand sanitiser. These new practices unquestionably cause

inconvenience and dermatological discomfort. At the pandemic peak, Laboratoires Genevrier wished to provide support and comfort to those who honorably committed to saving human lives.

Our support has been illustrated with hospitals in the South area through the "Provence-Alpes-Côte d'Azur" Regional Health Agency, "Saint-Antoine" Hospital in Paris and local medical analysis laboratories by the donation of surgical masks and cosmetic products containing moisturising and healing agents based on hyaluronic acid.

Today, we are proud of having supported the medical staff and contributed to their better living during this complicated and unprecedented period.

Laboratoires Genevrier thank healthcare professionals again for the courage and the strength they have always shown. "

Major mobilisation by community pharmacists, at the forefront to respond to the needs of patients



Just like pharmaceutical companies, French community pharmacies got strongly mobilised to offer primary care solutions, in particular through the dispensing of selfcare products. They were also a strong link for social cohesion in a worrisome context.



Very few pharmacies closed during the health crisis and almost 75% of them maintained their usual opening hours, thereby **ensuring the continuous access to primary care and selfcare products.** (12)



This accessibility enabled them to meet the patients' large demand: **nearly 42% of the community pharmacists have reported an increase in the advice given to prevent or treat minor ailments** since the beginning of the health crisis. (12)



Pierre-Olivier Variot

Vice-President of USPO (Union des Syndicats des Pharmaciens d'Officine, one of the Pharmacy Owners trade unions)
Bourgogne-Franche Comté region
Community pharmacist in a rural area (Côte-d'Or) for over 20 years



"The pharmacists' role was essential during this crisis because we are one of the few healthcare professionals to have maintained our activity and stayed open during our usual opening hours.

During the health crisis, we played an important role in reassuring patients. We noted a drop in the number of visits to our pharmacies, which was compensated by a large increase in the number of calls from patients seeking advice and reassurance.

This crisis has enabled us to develop digital services to ensure patient follow-up. We also collaborated with the other healthcare professionals - nurses, dentists, doctors - in order to provide essential treatments to patients despite the absence of a direct prescription. As an example, we often had to deal with patients suffering from extreme dental pain; thanks to our cooperation with their dentists who faxed their prescriptions, we were able to provide them with their treatment.

Furthermore, we also cooperated with the pharmaceutical companies to ensure that we would have enough medicines to cover a sufficiently long period of time, in order to enable our patients to receive their essential treatment throughout the duration of the crisis.

We also offered to our most fragile patients to dispense their treatment directly at home so that they would not have to go out, which contributed to limiting the spread of the virus. This was time-consuming for us because, in normal times, we visit 5 to 6 homes, whereas during the crisis we visited up to 25.

I also stress the importance of simplifying our professional software through the development of tools to strengthen the pharmacist's role as primary healthcare professional; another proposal would be that our professional software enable us to automatically enter in the Patient Pharmaceutical Record the dispensing of all OTC medicines, as well as the medical devices and food supplements deemed relevant by pharmacists."



The pharmacies received 131 million visits for non-prescribed selfcare products between March 2nd and August 23rd, 2020¹, i.e, **an average of 747,000 visits per day and 6,322 per pharmacy**. This avoided as many visits to a general practitioner (GP) during the pandemic. [4]



These figures are to be put into perspective with the decrease by 1 million dispensing of OTC medicines prescribed by a GP between March 23rd and April 12th 2020. [4]



The crisis has **expanded the missions of pharmacists**, who ensured the availability of masks and compounding of hand sanitisers, thus contributing to the national effort. Patients were also able to access medical teleconsultations through numerous telemedicine booths installed in the pharmacies.

This crisis has led community pharmacists to re-think the services offered in their pharmacies:



nearly 76% have developed home delivery of medicines (12)



33% have proposed new services (and a further 27% intend to do so in the coming months) (12)



60% have re-thought the lay-out of their pharmacy (12)

The pharmacists have also played a role in limiting the risks of supply chain disruption and shortages for certain OTC medicines such as paracetamol and nicotine replacement therapy. In this context, restrictions on dispensing were introduced by the Ministry of Health (for example, only 1 box of paracetamol could be dispensed for an asymptomatic patient, and 2 boxes for a symptomatic patient).

The pharmacists used the Patient Pharmaceutical Record to record each dispensing, thereby contributing to the appropriate use of these products as well as a reasoned purchase by the patients. This approach avoided unnecessary purchases and ensured patient safety through a more complete review of potential contraindications and drug interactions. **One could however regret that access to the Patient Pharmaceutical Record is limited by the necessity to present the patient's Social Security card (which the patient does not always have with him).**



Given the front-line role played by community pharmacists in the provision of healthcare during the crisis, **nearly all of them (98%) are in favour of increasing the number of medicines which can be dispensed without a prescription, with a view to improving the management of minor ailments.** [12]



Fabrice Camaioni

President of the Pharmacy Practice Commission at the FSPF (Fédération des Syndicats Pharmaceutiques de France, one of the Pharmacy Owners trade unions)

Community pharmacist in the Ardennes area for 31 years

"Community pharmacists played an important role for the patients during the health crisis, especially during the confinement period during which most of the private healthcare professionals were not accessible.

The community pharmacists kept their usual opening hours, and the patients were able to benefit from the geographical distribution of pharmacies, which are present in both rural and urban areas. In addition, the pharmacies got organised very quickly to provide a safe space to patients in a worrisome, uncertain context.

We designed circulation paths within the pharmacies, set up and promoted barrier gestures, provided patients with hand sanitisers, wore gloves and masks. This reorganisation inside pharmacies enabled the patients to feel safe.

We also noted a very steep increase in the number of patients visiting our pharmacies to be reassured. They also came to obtain advice on minor ailments such as seasonal allergies, and on the strategy to adopt or the products to use to boost their immune system and thus avoid catching the virus. We also got a lot of requests for advice on how to deal with ENT (ear, nose and throat) issues (sore throat, nasopharyngitis, allergies).

This health crisis has shown that the community pharmacist's role is important and that his expertise is under-utilised. It would be appropriate to review the healthcare pathway and to allow pharmacists, via a carefully-defined protocol, to dispense a Prescription-only medicine in certain very specific situations. The OTC medicines offer is fairly limited and the therapeutic resources available to pharmacists is shrinking. Switching certain medicines could be another option.

Finally, pharmacists could also play a role in preventing the spread of viruses by providing nutrition recommendations, and increasing patient awareness about better hygiene for example.

This unprecedented crisis has shown that the pharmacist's role is essential in the patients' healthcare pathway and we hope that certain improvements will soon be implemented."

2. The Patient Pharmaceutical Record lists, for each healthcare insurance beneficiary who so wishes, all the medicines dispensed over the last four months, whether prescribed by a doctor or advised by a pharmacist. The Patient Pharmaceutical Record was created by the law of 30 January 2007 on the organisation of certain healthcare and prevention professions; the National Chamber of Pharmacists is responsible for its implementation. [14]

Patients want to be more involved in their primary healthcare and in prevention

In August 2020, Afipa conducted a survey over a representative sample of the French population (1004 people) to collect their feedback regarding community pharmacies and selfcare products, in particular during the period of the Covid 19 pandemic.



Between March and August 2020, **79.8% of the French population** visited a pharmacy to buy selfcare products without a prescription, excluding the purchase of masks and hand sanitisers; this proportion is similar to the visits over the entire year 2019. (1) The community pharmacies have thus demonstrated their major contribution to facilitate access to primary care and selfcare products

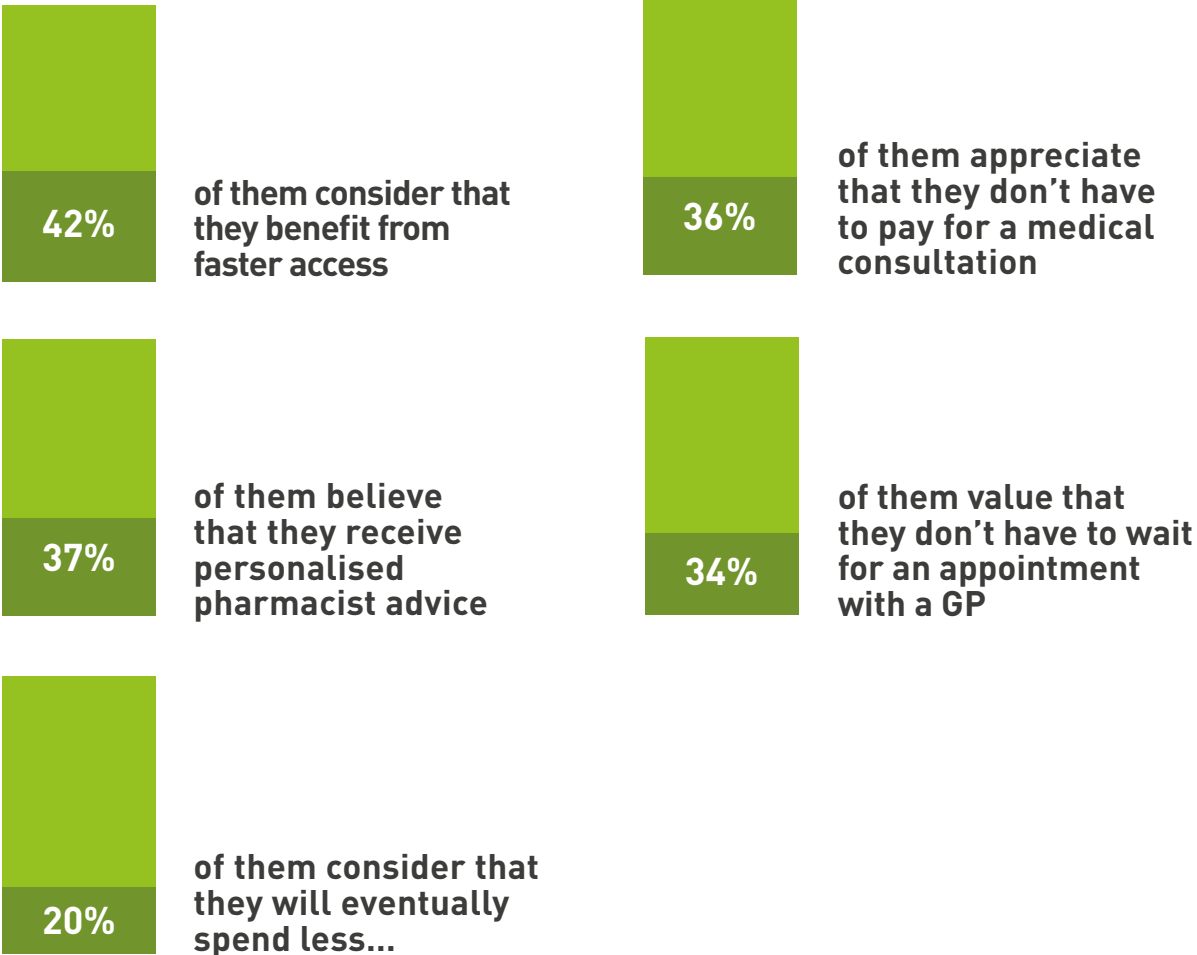


Furthermore, the French people modified their habits: **over 27% of the patients chose to rely even more on their pharmacist's advice and selfcare products (rather than via a visit to their GP) to prevent or treat minor ailments**, during this period... and they therefore relied on selfcare products to prevent or treat minor ailments. Visits to the pharmacies were notably favoured by the 25-49-year-old age group and by families with children. (1)



The level of patient satisfaction has remained very high: **79% of the patients trust their pharmacist**, and are loyal to their pharmacy in similar proportions (78%). This relationship of trust is also based on a close relationship with "their" pharmacist: more than 57% of French people know their pharmacist by his or her name. (1)

Finally, the French people are aware of the numerous advantages of selfcare products available without a prescription compared to a visit to the doctor or to hospital emergency services for minor ailments:



Based on these advantages, 39% of the patients would like to have access to more OTC medicines dispensed in community pharmacies;

this clearly shows the population's strong desire to rely more on community pharmacies to deal with minor ailments. This could be done, in particular, by switching new medicines to make them available without a prescription. [1]

In 2017, Afipa had identified 90 molecules which could become accessible without a prescription if France aligned itself with the practices of its close European neighbours; this would also generate savings of 1.5 billion euros for the French Social Security. [13]



Gérard Raymond

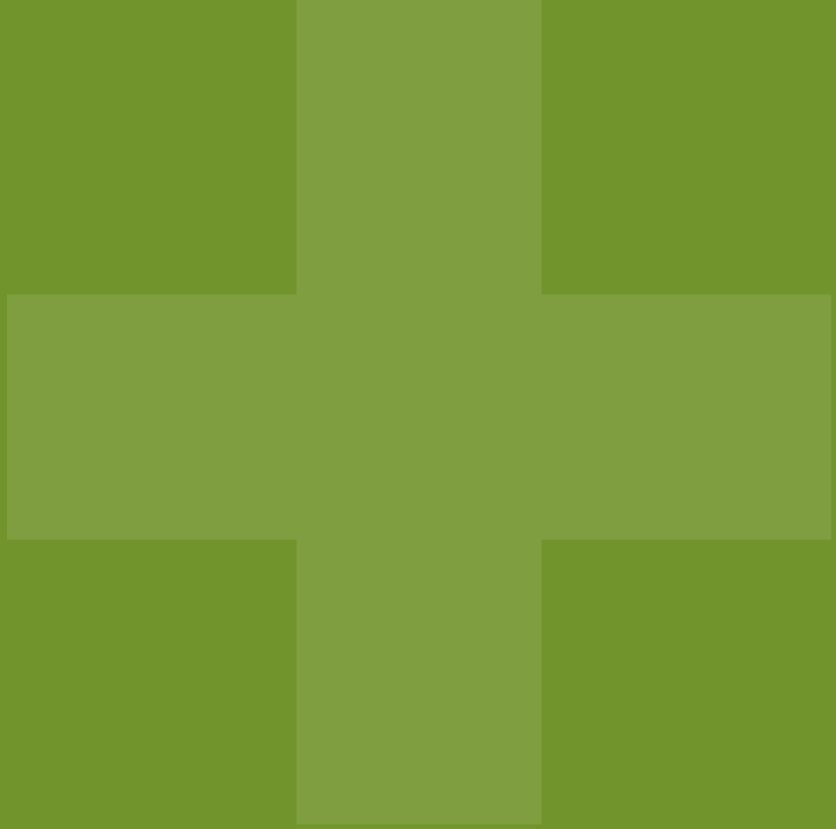
President of France Assos Santé (National Union of the Accredited Patients Associations)

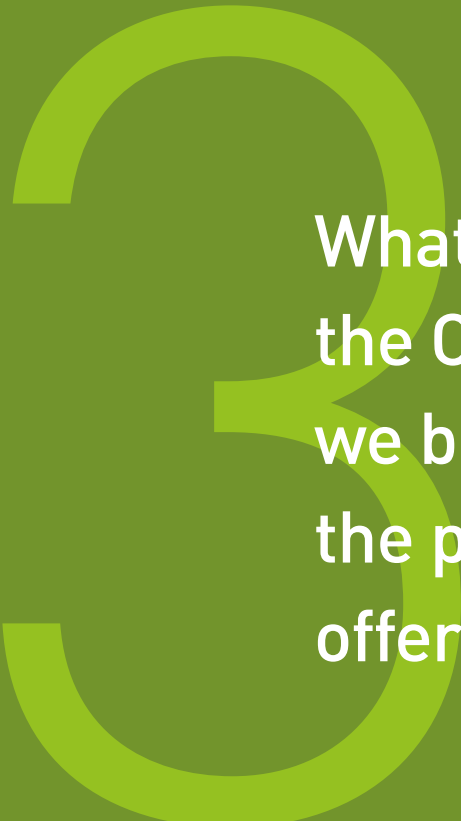
This organisation represents healthcare users (patients, families, disadvantaged populations, people with disabilities, consumers, elderly people) before all health institutions.

"In an extremely worrisome context, the community pharmacists played a major role during the health crisis, by providing the healthcare users with continuous service for their chronic illnesses. They also reassured the healthcare users about the virus, and provided them with advice. The community pharmacists were an integral part of the solidarity chain throughout the crisis and especially during the confinement period, during which they remained available in the pharmacies as during normal times. All patients definitely valued them and recognised them as healthcare professionals, given their availability to advise and reassure.





This recognition of pharmacists as healthcare professionals shows the need to improve the coordination between the healthcare players and the pharmacists at a more local level (regional, departmental). In the future, the pharmacists' role could also be enlarged to dispense more medicines within the healthcare pathway, via the switching of certain Prescription-only medicines and following a specific protocol to ensure patient safety. As healthcare professionals, the pharmacists could also become more involved in prevention actions, in the education and counselling of patients, and finally in their vaccination.

I would like to praise the work and dedication of the community pharmacists throughout this health crisis and I hope that some of these proposals will be implemented."





What lessons from
the COVID-19 crisis can
we build on to consolidate
the primary healthcare
offer?



For many years, Afipa has been promoting the numerous benefits of a more responsible use of selfcare products, available in pharmacies without a prescription. Developing such a use would:

- **Decongest hospital emergency rooms and GP offices.**
- **Provide savings for the French health insurance.**
- **Empower patients as responsible actors of their daily health and well-being.**

The exceptional health crisis experienced by France highlighted another crucial aspect which, until then, had not been fully integrated in healthcare policies: the role of selfcare products available in pharmacies, in terms of resilience and accessibility of the French healthcare system, including during exceptional periods (such as the confinement from March 17th to May 11th, 2020).

This resilience relies, in particular, on a local access provided all over mainland France and overseas territories by the extensive network of pharmacies and on the commitment of the pharmaceutical companies which manufacture and commercialise selfcare products.



How can we stimulate the development of an ecosystem favourable to primary care, by enabling the French people to have a wide access to selfcare products without a prescription, dispensed and secured by pharmacists?

How can we better meet the patients' high expectations to easily access selfcare solutions, dispensed without a prescription, and at the same time guarantee a reasoned, safe and responsible use of such products?

Afipa has identified a series of proposals which can be easily implemented and which would provide a positive impetus to these proven healthcare solutions. These proposals are detailed in the next section.

Our concrete proposals to reinforce the accessibility and resilience of the French healthcare system

I. A pharmacy-based healthcare pathway, relying on the pharmacists' expertise to ensure patient safety and access to primary care

Implement a new, more secure pharmacy-based care pathway, in particular through the following actions:

1. Develop tools for the community pharmacist, to support him in strengthening his role as primary healthcare professional:

A For all medicines: through the pharmacists' initial and continuing education on molecules, in collaboration with the health authorities, professional societies, universities and pharmaceutical company employees such as pharmaceutical representatives who could remind them about the Summary of Product Characteristics (SPC) during their visits to the pharmacy;

B For molecules requiring increased vigilance and new molecules switched to OTC: provide decision trees / new dispensing protocols developed by professional societies³ and, ideally, integrated in the pharmacy software.

Expected effects:

- Provide better advice
- Improve the appropriate use of OTC medicines

Implementation timeframe: medium term

2. Record the dispensing of all OTC medicines, as well as some medical devices and food supplements deemed relevant by the pharmacist in the Patient Pharmaceutical Record.

Expected effects:

- Allow a better detection of possible interactions
- Ensure full traceability of the dispensing
- Prevent pharmaceutical nomadism associated with misuse cases
- Increase data and knowledge on the usage of selfcare products (support vigilance)

Implementation timeframe: short term

3. Such as the French Society of Clinical Pharmacy (Société Française de Pharmacie Clinique, SFPC) and the Francophone Society of Community Pharmacy Sciences 31

3. Promote the community pharmacist's role in primary care, as part of a care network, via communication campaigns associating pharmacists and Afipa

For example, campaigns which highlight the pharmacist's role to advise and inform patients and, whenever necessary, refer the patient to another healthcare professional better able meet the patient's need.

Expected effects:

- Increase the number of visits to pharmacies for primary care (resulting in healthcare savings and a decongested healthcare system)
- Strengthen the pharmacist's role as a healthcare professional and vector of social cohesion.

Implementation timeframe: medium term

4. Eliminate economic obstacles to primary care in community pharmacies

Participate in the development of new schemes to (partly) cover the costs of certain categories of selfcare products, by:

- A** Private complementary health insurances to reimburse complete categories of selfcare products without any selection of community pharmacies (directly or through prices).
- B** Regional Health Agencies (ARS, Agence Régionale de Santé) and/or Regional Councils to cover the expenses for certain populations with restricted access to doctors and/or populations with low or modest incomes.
- C** Incentive mechanisms to be set up for patients: for example, make non-reimbursed healthcare expenses tax-deductible up to €100.

Expected effects:

- Prevent irrelevant visits to a GP
- Decongest emergency rooms (care pathway preferred by certain patients for financial reasons)

Implementation timeframe: medium term

II. Strengthen the capacity of the healthcare system to better ensure the appropriate use of selfcare products

1. Develop a Public Private Partnership between the pharmaceutical companies and health authorities to inform and communicate on diseases, outside of product and appropriate use.

This information - based on scientific data - would be shared via digital communication means. It would be adapted to patients and healthcare professionals. It could also rely on a QR code to access patient leaflets, and a video platform explaining how to take selfcare products.

2. Adapt the on-line sales regulations regarding selfcare products, to accommodate both patient expectations and their appropriate use supported by the involvement of a pharmacist.

Expected effects:

- Ensure the safety of patients wishing to buy selfcare products on line

Implementation timeframe: medium term

3. Improve the efficiency and transparency of the sector's contribution to the health authorities to ensure the appropriate use of selfcare products:

- Generalise the use of digital processes and administrative decisions for selfcare products
- Conduct a more effective consultation phase, by reviewing consultation and communication processes, improving the transparency of the consultations received from the various stakeholders, and avoiding separate consultations between different stakeholders.
- Circulate more quickly the minutes of expert meetings and the results of assessments, especially when public health risks are discussed (to enable the pharmaceutical companies to be proactive and take appropriate measures, in addition to and in coordination with health authorities).

Expected effects:

- Increase the transparency and efficiency of administrative processes
- Make consultations more effective with exchanges with and among the various stakeholders
- Adopt decisions which incorporate the feedback of all stakeholders

Implementation timeframe: medium term

III. Integrate selfcare products available in pharmacies in effective policies to organise care

1. Integrate the concept of pharmacy-based healthcare pathway in the primary healthcare offer in France

This integration should take place at several levels: national policies, regional policies and local level through the Professional Territorial Health Communities (communautés professionnelles territoriales de santé, CPTS).

Expected effects:

- Fully integrate the primary healthcare offer in community pharmacies with other primary healthcare offers (GPs, emergencies, etc...).

Implementation timeframe: short to medium term

2. Integrate the contribution of selfcare products as a budget lever in future Social Security Finance Bills.

Expected effects:

- Offer budget leeway for the French Health Insurance

Implementation timeframe: short to medium term

3. Organise regular (quarterly) thematic meetings on OTC medicines with the relevant authorities such as the ANSM⁴, the DGE⁵ and the DGS⁶

Build on the positive discussions which took place on certain products during the Covid crisis.

Expected effects:

- Provide stakeholders with better information regarding future decisions
- Enable all stakeholders to have a dialogue, via a transparent, ethical process, on all OTC medicines (and not on a case-by-case basis)

Implementation timeframe: short term

4. Organise regular meetings between industrials and the ANSES⁷, similar to those with the ANSM through the Interface Committee.

Expected effects:

- Ensure better information of stakeholders regarding future decisions
- Enable all stakeholders to have a dialogue, via a transparent, ethical process

Implementation timeframe: short term

4. ANSM: Agence nationale de sécurité du médicament et des produits de santé - National Agency for the Safety of Medicines and Healthcare Products

5. DGE: Direction Générale des Entreprises - General Directorate of Enterprises

6. DGS: Direction Générale de la Santé - General Directorate of Health

7. ANSES : Agence nationale de sécurité sanitaire de l'alimentation, de l'environnement et du travail - French Health Safety Agency for Food, the Environment and Occupational activities

IV. Recognise the value of some production capacities in Europe and in France and promote them

Adopt an industrial policy supporting the production of some OTC medicines and active pharmaceutical ingredients in Europe and in France, through:

- Tax incentives (for example, tax credits, tax deductions, etc.)
- A long-term visibility of the evolution of regulations on OTC medicines (including on switches), in order to encourage manufacturers to sustain their investments in France.
- A more efficient administrative process for medicines in France, based on: lighter procedures to obtain and modify Marketing Authorisations (MA) (the processing time is too long compared to other OECD countries (Organisation for Economic Cooperation and Development); a “fast-track” process when relocating production
- Support to production ecosystems: policy to invest and create (or integrate) health technopoles within territories in France.
- Promote production in France and in Europe with “Made in France” and “Made in Europe” labels.

Expected effects:

- Encourage the (re)location of production in France and in Europe, through coordinated policies (tax, economic, training, research...).
- Facilitate administrative procedures to restore the attractiveness of France to (re)locate the regulatory affairs headquarters of pharmaceutical companies

Implementation timeframe: medium to long term

Conclusion

Since the beginning of this unprecedented period, the pharmacists and pharmaceutical companies have held the front line by responding to the healthcare needs of the French people through the dispensing of selfcare products available without a prescription in community pharmacies.

Afipa is drawing the first lessons of this health crisis, which has shown the importance of selfcare products and their contribution to the resilience and accessibility of the French healthcare system.

This approach has led Afipa to make concrete proposals to the healthcare professionals and authorities in four main areas: the pharmacy-based healthcare pathway, the appropriate use of selfcare products, the healthcare organisation policy, and the recognition of the value of production channels.

Our concrete proposals aim to contribute to an in-depth reflection on the importance of selfcare products in healthcare pathways, both existing and future, as well as on the predominant role of community pharmacies and pharmacists to prevent and treat minor ailments.

This document also highlights the value of our industry in terms of resilience, which must also be combined in the future with collective power. In it in this spirit of dialogue that tomorrow's healthcare system must be designed



President of Afipa
Christophe de la Fouchardière

A handwritten signature in black ink, appearing to be 'C. de la Fouchardière', written in a cursive style.

Managing Director of Afipa
Luc Besançon

A handwritten signature in black ink, appearing to be 'Luc Besançon', written in a cursive style.

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