

Overview of the Activities of Estonian Pharmacies in 2008

In Estonia there are three types of Pharmacies operating: retail, veterinarian and hospital pharmacies. A pharmacy can have three subsidiary pharmacies as part of their structural units.

The number of retail pharmacies was increasing until 2006, when a restriction on the foundation of new retail pharmacies came into force. Onwards year 2007 the number of retail pharmacies decreased. Beginning of the year 2009 in Estonia there was an activity license issued to 308 retail pharmacies, which had 188 structural units. The numbers of hospital pharmacies has changed the least, remaining the same in general. Significantly has decreased the numbers of veterinarian pharmacies with every year, comparing to 2004, in the last five years the numbers of veterinary pharmacies have decreased by 72%. In the beginning on 2009 there were 7 veterinarian pharmacies operating in Estonia, one of them is a structural unit.

Retail pharmacies gross turnover in year 2008 was 230 million EUR, hospital pharmacies gross turnover was 60 million EUR and veterinarian pharmacies gross turnover was 1,27 million EUR. Compared to the year 2007 hospital pharmacies turnover increased the most, by 24%. Retail pharmacies turnover increased by 11% and veterinarian pharmacies turnover by 5%.

The biggest gross turnover of medicines was in retail pharmacies, which constitutes 79% in year 2008. In hospital pharmacies the turnover of medicines was 67%, because hospitals need more medical appliances and sanitary supplies, which are not included in medicines. In veterinary pharmacies the turnover of medicines was 44%, mainly they give out animal food and other everyday animal utensils.

Retail pharmacies turnover consists ~80% of medicines and 20% of other goods sales. The other goods which are handled in pharmacies are hygienic means, medical techniques, food additives, cosmetics and so on. Over-the-counter sale medicines turnover is a bit less then a quarter out of total medicines turnover. Prescription medicines turnover can be divided into discounted and not discounted prescriptions. In retail pharmacies for the most part medicines are given out on the basis of discounted prescriptions.

Discounted prescriptions make up on an average 90% of the total prescription medicines turnover. From the cost of discounted prescriptions the patient paid in the year 2008 ~37% and the Estonian Health Insurance Fund ~63%. In the year 2008 the average price for discounted prescriptions was 20 EUR, which is ~3% bigger than in the year 2007.

In the past five years the spending per person in one month has increased by 60% and the over-the-counter sale medicines have increased by 40%. Every Estonian resident spent 6 EUR in a month and over 73 EUR in a year on medicines in the year 2008.

Pharmacies average turnover has increased by ~13% in 2008 compared to 2007. Retail pharmacies average gross turnover was 730 000 EUR in 2008 and medicines turnover was 580 000 EUR. Mainly pharmacies in Tallinn are inflicting such a big average turnover, thus the average years gross turnover was 1,2 million EUR and average medicines turnover was 940 000 EUR in Tallinn. All the rest retail pharmacies average gross turnover was 568 000 EUR and average medicines turnover was 460 000 EUR.

All together there were approximately 242 000 packages prepared in retail pharmacies in 2008, of those more than 64 000 packages were Extemporal medicinal products. Approximately 121 000 EUR were charged for prepared and retailed packages. An average of 0,4 EUR was added to the price of a medicinal product as the preparation and retailing fee. Extemporal medicinal products were mainly prepared in the pharmacies in Tallinn, they constituted 46% of all extemporal medicinal products which where made in 2008.

In Estonian retail pharmacies, including structural units 795 pharmacists, 552 assistant pharmacists and 495 other employees were working in the end of the year 2008.

Veterinary pharmacies

In the beginning of 2009 there were 6 veterinarian pharmacies plus one subsidiary pharmacy operating in Estonia. The numbers of veterinary pharmacies has continuously decreased with every year, the reason for that is that in the year 2006 a requirement started applying according to which the veterinary service provider could not be at the same time possessor of veterinary pharmacies license. But a veterinarian can buy veterinary medicines directly from wholesalers.

In 2008 the years turnover of veterinary pharmacies was between 64 000 and 446 000 EUR. The average turnover of veterinary pharmacies in 2008 was 217 000 EUR, on the other hand in 2004 it was 76 000 EUR.

In the end of 2008 there were 12 vets and 4 other employees working in 6 veterinary pharmacies.

Hospital pharmacies

In the beginning of 2009 there were 23 hospital pharmacies with 5 structural units operating in Estonia. Compared to retail and veterinary pharmacies the hospital pharmacies gross turnover has increased the most between 2004 and 2008. The gross turnover in hospital pharmacies in 2008 was 60 million EUR, which included medicines turnover of 40 million EUR.

Hospital pharmacies have very different turnovers: the yearly turnover of 12 pharmacies is under 600 000 EUR, there are 7 medium scale hospital pharmacies and 4 biggest turnover hospital pharmacies that give 76% of hospital pharmacies total turnover. The biggest pharmacies are affecting strongly hospital pharmacies average turnover, which in 2008 was 2,6 million EUR. Remaining hospital pharmacies gross turnover was significantly smaller, in average 753 000 EUR.

In hospital pharmacies personnel pharmacists are predominant. In 2008 there were 74 pharmacists, 24 assistant pharmacists and 36 other employees working in hospital pharmacies.

For further information on the activities of Estonian pharmacies please contact the Estonian State Agency of Medicines via e-mail: info@ravimiamet.ee.