THE LEADING PHARMACEUTICAL WHOLESALER IN THE UK

Member of Walgreens Boots Alliance
SERVICES, PRODUCTS, BRANDS - OUR COMPLETE OFFERING

Alliance Healthcare is the Pharmaceutical Wholesale Division of Walgreens Boots Alliance, the first global pharmacy-led, health and wellbeing enterprise in the world. We provide an innovative range of wholesale distribution, and related services, for the pharmaceutical and healthcare industry.

Our service offering covers wholesale, pre-wholesale and contract logistics as well as a growing portfolio of added-value services that includes clinical trials, Alphega Pharmacy, Direct-to-Pharmacy, contract sales and homecare.

Our market-leading approach is founded on superior performance, innovative added-value services, efficiency and effectiveness, and committed teams.

Our wholesale offering focuses on providing patients, manufacturers and healthcare professionals with an efficient distribution service for the supply of medicines and other healthcare products to pharmacies, dispensing doctors, hospitals and health centres. Alliance Healthcare's range of services also includes Surgicals, Health and Beauty and Pharmacy Professional Services, which help pharmacists generate new income streams and manufacturers work more closely with pharmacists to make a real difference to patients.

Since its launch in 2001, Alphega Pharmacy has grown to become Europe’s leading independent pharmacy network, supporting more than 4,800 independent pharmacies across seven countries. In the UK alone, Alphega Pharmacy now has more than 1,000 pharmacy members and is continuing to grow through offering new technologies and service innovations that ensure members stay one step ahead of the fast-moving and evolving, healthcare environment.

Alvita is our branded range of patient care products including surgical, diagnostics and everyday health and hygiene.

Alcura provides innovative and specialised healthcare services that meet the needs of healthcare professionals, our business partners and patients across Europe. Our full range of global services are categorised in to five key areas: clinical homecare, medicine support, dispensing services, medicine preparation and clinical trial support.

Almus, our award-winning branded range of generic medicines, was the first international generic brand to tailor its pack design to meet the needs of both patients and pharmacists.

Alloga UK provides supply chain solutions to the UK Healthcare industry, offering specialist storage, fulfilment and distribution services for pharmaceutical, healthcare, medical device, veterinary and consumer product manufacturing companies. With many years of experience we’re passionate about providing the best possible service to our clients; and their wholesale, hospital, pharmacy, veterinary and retail customers.

Skills in Healthcare is a contract sales and marketing specialist provider in the UK and now operates in ten European countries. Through the provision of field sales and training, telesales and tele-marketing excellence, it is able to offer unique, innovative sales capabilities, individually tailored to help maximise manufacturers brands’ full potential in the retail pharmacy environment. As part of the Walgreens Boots Alliance, Skills in Healthcare has access to wider capabilities and expertise to deliver end to end brand support solutions.

Established in 1996, OTC Direct supports independent pharmacy by offering its customers an integrated range of short-line generics, parallel imports and surgical products. It offers nationwide coverage of deliveries using the Alliance Healthcare network. With local customer-orientated focus, its experienced telesales, sales and customer service teams are dedicated to providing high-quality service to pharmacists across the UK.

North West Ostomy Supplies (NWOS) is a leading specialist surgical appliance wholesaler and a registered Dispensing Appliance Contractor, providing ostomy, incontinence and wound care products, both direct to patients and in partnership with primary care contractors.

Established in 1991, Cavendish supports independent pharmacy by offering its customer an integrated range of short-line generics, parallel imports and surgical products. With local customer-orientated focus, its experienced telesales, sales and customer service teams are dedicated to providing high-quality service to pharmacists, with twice-daily deliveries, across Yorkshire, North West and the Midlands.
Alphega Pharmacy UK

Since its launch in 2001, Alphega Pharmacy has grown to become Europe’s leading independent pharmacy network, supporting more than 4,800 independent pharmacies across seven countries. In the UK alone, Alphega Pharmacy now has more than 1,000 pharmacy members and is continuing to grow through offering new technologies and service innovations that ensure members stay one step ahead of the fast-moving and evolving, healthcare environment.

Our mission

Alphega Pharmacy UK aims to become the independent community pharmacy network of choice for consumers, manufacturers and independent pharmacy owners. We will achieve this through:

• investing in a differentiated product offer
• building national scale
• increasing member compliance
• increasing pharmacy team engagement
• increasing manufacturer engagement
• building a visible trade and consumer brand

Our UK 6 year record

Since launch, we have achieved a membership base of 1,000 a 20% market share of Independents 1-5.

Key milestones

<table>
<thead>
<tr>
<th>Year</th>
<th>Milestone</th>
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<tbody>
<tr>
<td>2008-09</td>
<td>Launch of Access membership level - now 80% of our membership base</td>
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<td>2009-10</td>
<td>Launch of exclusive Alphega Pharmacy Development Programme - the structure behind all our products and services</td>
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<td>2010-11</td>
<td>Launch of innovative ‘Service in a box’ concept - anticipating national commissioning of services</td>
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<td>2011-12</td>
<td>Launch of Mystery Shopper - now expanded to a full Customer Care programme</td>
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<td>2012-13</td>
<td>Launch of advantageplus - driving Generics spend for Almus and Alliance Healthcare</td>
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<td>Launch of consumer website and pharmacy locator. Now 560+ members featured on the pharmacy locator</td>
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<td>2013-14</td>
<td>Alphega reaches 1,000 member milestone</td>
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<td></td>
<td>Launch of the tablet with exclusive app’s for members and pharmacy team training</td>
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<tr>
<td></td>
<td>60%+ members branded</td>
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<td>Launch of Retail Partnership</td>
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Alvita is Alliance Healthcare’s own brand range of patient care products, which offers a wide selection of reliable, high quality products.

The range is available in six European markets, and benefits from the synergies available through Alliance Healthcare, the UK’s leading pharmaceutical wholesaler and part of a Group present in all leading European markets. The key benefits include:

- Value for money
- Own brand product range
- High quality products
- 184 products in range
- Supporting imagery, to help patients pick the right product
Alcura is an international provider of innovative and specialised healthcare services that meets the needs of healthcare professionals, business partners and patients.

As a member of Walgreens Boots Alliance, the first global pharmacy-led, health and wellbeing enterprise in the world, we can integrate services from across our international group to support our core Alcura offering to patients and our partners.

With our centralised model and international expertise, we can give our customers one point of contact and one invoice for multiple country projects. We also share best practice between our countries to support initiatives in single markets.

Our specialised services span across many countries. Our expertise includes:

- Supporting over 100,000 patients in key European markets through a team of over 300 specialist nurses and advisors
- Dispensing of over 2,2 million doses a month for patients
- Provision of over 2,500 unlicensed medicines and 70,000 special obtain products
- Over 400 clinical trials already supported

In our name Alcura you find our promise. ‘Cura’ means care in Latin, which reflects our dedication to patient care.
Our full range of services are categorised in to five key areas:

**Clinical homecare**
Through provision of medicines, medical equipment and nursing care we provide personalised care to patients in the home environment.
- Convenient drug and devices delivery and specialised product packaging
- Nursing support and patient help line
- Preparation of clinical rooms at the patient’s home
- Homecare supplies to patients, hospitals and pharmacies

**Dispensing services**
Range of services and medication compliance aids provided to healthcare professionals to support patients in taking their appropriate medicine dosage, in turn ensuring safety and efficacy of treatment for the patient.
- MDS (monitoring dosage systems and other dosage systems)
- Central filling and personalised package preparation for patients on behalf of pharmacies and hospitals
- Provision of unlicensed medicines

**Clinical trial support**
Supporting our healthcare partners in clinical trials from identification of patients to manufacturing and sourcing of products through to logistics.
- Manufacturing and analytical services
- Patient recruitment in partnership with pharmacies
- Logistics and comparator sourcing

**Medicine support**
We support patients with their medication in order to achieve optimum health outcomes. We achieve this through the provision of professional advice, training and where appropriate the use of technology.
- Personalised medicines adherence programmes
- Patient recruitment and in partnership with pharmacies

**Medicine preparation**
Expert pharmaceutical preparation of medicines in to an appropriate format resulting in a safe and useable product for the patient.
- Compounding and manufacturing of customised products
- Semi-industrial reconstitution
- Nurse-led reconstitution

**Unlicensed Medicines**
- Trusted, MHRA approved and dedicated to patient care
- Bespoke Specials are unlicensed medicines manufactured at very short notice and in low volumes to meet the specific clinical requirements of a patient
- Batch Manufactured Specials are unlicensed medicines, similar to Bespoke Specials, but are manufactured in batches due to the high demand
- Imported Specials are products that are licensed in their country of origin and imported to the UK. They remain unlicenced within the UK

To find out more about Alcura, please call +44 (0)1932 870 630 or email info@alcura-health.com
The Almus® pack design was created specifically to help dispensers and patients to differentiate between generic medicines. The design clearly communicates essential information, and reduces the potential for dispensing errors, by triggering active-thinking before dispensing through the ‘colour contrasting’.

The revolutionary, vibrant, user-focused packaging was launched in the UK in 2003. It was the catalyst for change in the generics industry as it changed packaging standards. Until then, the UK market had predominantly white packs that led to confusion as there was no clear differentiation between each pack. Ten years on, Almus packaging continues to stand out in dispensaries across the UK and remains true to its mission:

“To be at the forefront of generic medicine packaging design which enhances patient safety – offering a real point of difference for dispensers and their patients.”

Everything we do seeks to support the promotion of patient safety, improve operational efficiency and, of course, maintain competitive pricing.

<table>
<thead>
<tr>
<th>Features</th>
<th>Benefits</th>
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<tbody>
<tr>
<td>The Almus® packaging</td>
<td>The packaging is ‘Designed to Aid’ Dispensing which helps minimize the risk of dispensing errors. It also drives patient loyalty.</td>
</tr>
<tr>
<td>Life-like Pill on pack</td>
<td>Provides accurate identification of the product benefitting both patient and dispensary teams.</td>
</tr>
<tr>
<td>Colour contrasting on pack</td>
<td>Encourages active thinking; the same strength will feature as a different colour on Almus products so colour is not a short cut to selection.</td>
</tr>
<tr>
<td>The Almus® Range</td>
<td>Covers the majority of the top volume dispensary requirements: top generic/fast-moving lines and niche products.</td>
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</tbody>
</table>
The information on an Almus pack is purposefully positioned to provide the optimum visibility of the important details required by the dispensary team and patients, to minimise the risk of dispensing errors and support the safe usage of the products by patients in their home.

Clear critical information
Bold text positioned to provide optimum visibility of product details

Ease of reference
Key colour contrasts and design elements prominent on three non-opposing sides to aid visibility and safety in the dispensary

Free space available
Large area allocated where possible for positioning of the prescription label

Clear patient details
Key patient safety information

Clear strength identity
Band colour chosen to differentiate between strengths of the same product, triggering active thinking

Strong pack identity
Contrasting pack colour chosen to immediately distinguish between other products when co-prescribed or sitting adjacent on a shelf

Increased visibility and safety in dispensaries and for patients from life-like pill on pack feature, providing accurate identification of the product

Almus® has launched a new website which includes the full ‘Product Guide’. Visit www.almus.co.uk

To discuss your product requirements:
Call 0800 032 0579 or email almus.sales@almus.co.uk

For medical information and reporting adverse events:
Call 0800 917 7983 or email medinfo@almus.co.uk
ALLOGA UK: LEADING PRE-WHOLESALE PROVIDING SUPPLY CHAIN SOLUTIONS TO THE UK HEALTHCARE SECTOR

Alloga UK provides supply chain solutions to the UK Healthcare industry, offering specialist storage, fulfilment and distribution services for pharmaceutical, healthcare, medical device, veterinary and consumer product manufacturing companies. With many years of experience we’re passionate about providing the best possible service to our clients; and their wholesale, hospital, pharmacy, veterinary and retail customers.

Our multi-user environment supports over 120 clients including over 20 of the top 50 pharmaceutical companies. We support both large blue chip organisations and small business start-ups. All benefit from the same high levels of care and expertise, whether storing 10,000 pallets or 10. MHRA approved and GDP compliant, our extensive list of accreditations and licences allow Alloga UK to offer a comprehensive service portfolio designed to optimise client supply chains.

Alloga UK works with the wider Alloga Network, active in more than 20 countries across Europe, offering a complete range of specialist logistic services. Our focus on the healthcare sector makes us a safe, long-term partner for manufacturers. Our services are split between Third Party Logistics (3PL), Full Service (Order to Cash), Transport-Only and other additional services, including Contract-Packing, Point of Sale (POS) Fulfilment and Technical Services.
Alloga UK - A qualified and expert partner

Alloga UK is authorised by the MHRA for healthcare and veterinary activities; WDA (H), WDA (V). We also hold a Manufacturer (assembly) licence MIA and ManA allowing Alloga UK to support clients with GMP contract-packing activities. Home Office approval for storing and distributing Controlled Drugs for Schedules 1, 2, 3, 4 parts 1 & II and 5. Furthermore we have importation authorisation from MHRA; assisting clients with the importing and exporting of stock.

We’re passionate about providing the best possible service to our clients and their customers; we ensure your products arrive safely into pharmacies, hospitals, wholesalers, pharmacy multiples, veterinaries, veterinary wholesalers, supermarkets and other retailers.

How can Alloga UK help?

Having been in UK Healthcare logistics for over 19 years we have the ability to facilitate all your logistic needs:

- Multi-temperature storage of temperature controlled stock.
- Multi-temperature transportation both pallets and parcels on own fleet
- Order processing and receipt
- Cash collection and credit management
- Portal information and control platform
- Customer service solutions
- IT service solutions
- Quality authorised technical services
- Contract-Packing
- Point of Sale catalogue management for field teams and marketing

Central UK storage and distribution

Centrally located by the M1 in Derbyshire, we’re perfectly positioned to reach the whole of the UK linking up with our own out-based vans fleet across the country. Alloga UK benefits from our Group (Alliance Healthcare) vans fleet visiting all UK hospitals and pharmacies twice daily.

We store and distribute goods worth over £3 billion a year to the pharmacy multiples, animal health wholesalers, veterinaries, wholesalers, supermarkets, and directly to pharmacies and hospitals. Plus, with Known Consignor status, Alloga UK is able to assist with exports on behalf of clients.

Temperature controlled storage and distribution

<table>
<thead>
<tr>
<th>Temperature Type</th>
<th>Example Temperature Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ambient Managed</td>
<td>-</td>
</tr>
<tr>
<td>Ambient Controlled</td>
<td>15 - 25°C</td>
</tr>
<tr>
<td>Aerosol Storage</td>
<td>-</td>
</tr>
<tr>
<td>Secure Storage</td>
<td>-</td>
</tr>
<tr>
<td>Refrigerated</td>
<td>2 - 8°C</td>
</tr>
<tr>
<td>Frozen</td>
<td>-24 °C</td>
</tr>
<tr>
<td>Cryogenic</td>
<td>-170°C</td>
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</tbody>
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Alloga UK facilities

- Over 130,000 pallet spaces across 5 warehouses
- 10 Group shared out-bases
- Temperature controlled fleet comprising over 100 HGVs and vans
- Internal Customer Service team
- Internal IT team
- Internal Finance team
- Internal Contract-Packing facility
- Internal Quality Team

Service excellence combined with innovative IT

Experts in Healthcare supply chains, Alloga UK combines service excellence with exceptional IT solutions, benefiting clients and their customers.

With our class-leading Partner Portal, ConsignIT (transport) and POS systems, clients always maintain full control of their supply chain. Receipts, stock levels and orders are visible by SKU, batch or expiry, right down to pallet location. With automatic e-mail stock level alerts, Partner Portal makes our warehouse your warehouse.

To see how Alloga UK can support your business, please visit our website at www.alloga.co.uk or call +44 (0) 1773 510 123 and ask for the Business Development team

Alloga UK Ltd, Amber Park, Berristow Lane, South Normanton, Derbyshire, DE55 2FH, UK
Tel +44 (0) 1773 510 123   www.alloga.co.uk
Alliance Healthcare’s manufacturer services team helps our manufacturer partners and other clients to deliver growth for their brands.

Using the team’s knowledge and experience, we can deliver a range of specialist added-value services, to help meet pressures in the supply chain, and adapt to developments in patient care and healthcare services across the UK.

We recognise that the patient journey in the healthcare system is becoming increasingly complex, and can help brands to identify opportunities for growth by focusing on outcomes which reflect the need for value, efficiency, education and compliance within tough NHS framework environments.

The added-value services we provide can be tailor-made and designed for each brand’s specific requirements – from pre-launch insights activities, to new product services, through to patient support programmes, delivered in the pharmacy.

We can also help manufacturers and our other clients with services that support their brand to grow across the supply chain – whether with patients and consumers in a retail or community pharmacy environment, through hospitals in outpatient environments, through dispensing doctors, or directly with patients in their own home.

Added-value services we offer our manufacturer partners and other clients to grow their brand include:

**Pharmacy professional services**
- Designing and delivering training and education for healthcare professionals, supporting manufacturers engagement ‘beyond the pill’ with patients

**Marketing communications services**
- Ensuring your messages reach the right audience when you need to
- Assisting with insight, design, print and distribution of marketing materials

**Stock management solutions including emergency order service**
- Delivering a range of bespoke services to overcome specific challenges such as centralised distribution, emergency ordering and prescription validation teams

**Added-value services for new product launches**
- Delivering a tailored mix of insight, marketing, training and patient support services which maximise awareness and growth of new brand launches
AS PASSIONATE ABOUT YOUR BRANDS AS YOU ARE

At Skills in Healthcare we are able to offer unique, innovative sales capabilities, individually tailored to help maximise your brands’ full potential.

Working in partnership with you, our extensive infrastructure combined with our commercial expertise and thorough understanding of the pharmacy channel, ensures we provide flexible and cost-effective solutions that deliver:

- **Field sales or training, telesales and telemarketing** resources to provide cost effective contact strategies
- **Flexible sales solutions** to manage your brands in all retail pharmacy sectors
- **Channel expertise** to ensure quality coverage
- **Integrated services capabilities** from Walgreens Boots Alliance to provide data insights, marketing and logistics support
- **Sales force excellence** to ensure total sales force visibility and clear measurement of agreed targets
- **Sales and product detailing** to grow share and brand recommendation, brand loyalty and customer service
- **Data analysis and reporting innovation** to support informed decision making and measure brand attitude and loyalty

Please contact us on 0800 015 5618; email david.bull@skills-in-healthcare.co.uk or visit us at www.skills-in-healthcare.co.uk
North West Ostomy Supplies (NWOS) is a leading UK supplier of surgical appliances, specialising in incontinence, hosiery and support, ostomy and wound care products.

NWOS offers a first class service and a partnership scheme so healthcare professionals can meet their patients’ appliance prescription needs.

**Features:**
- Enhanced dispensing fees
- Free wipes and bags
- Prompt payments
- Split packs available
- Fully qualified stoma and specialist nurses
- Flange and pouch cutting service
- EPS2 compliant

**Benefits:**
- Increased profitability
- Fast and efficient supply of the products you need with no cash outlay
- Full compliance with the Part IX regulations
- Access to over 7,500 stocked items including a vast range of dressings, urology, incontinence, ostomy and wound care
- A consistently high level of service supported by our specialist team of expertise that allows you to maintain the direct relationship with the patient.

www.nwossurgical.co.uk
OTC DIRECT

Established in 1996, OTC Direct supports independent pharmacy by offering its customers an integrated range of short-line generics, parallel imports and surgical products. It offers nationwide coverage of deliveries using the Alliance Healthcare network, with regional coverage offered through the Cavendish name. With local customer-orientated focus, its experienced telesales, sales and customer service teams are dedicated to providing high-quality service to pharmacists across the UK.

Our service capabilities
- Fantastic stock availability
- Consistency of supply
- Multi award-winning Almus brand
- 80% of pharmacy prescription volume
- The UK’s number 1 short-line wholesaler
- No. 2 in the short-line PI market
- 29,000 scheduled outbound calls per month
- 27,000 orders generated from these calls

The short-line market
- Commodity pricing model
- Predominantly to independent pharmacists*
- Highly fragmented with lots of players
- Limited product range of circa 2,200 lines
- Limited brand continuity (on generics)
- Entrepreneurial deal culture
- Penetrates significant proportion of generic and PI market
- Over 2,100 trading accounts each month
- Next day delivery
- Four methods for ordering

CAVENDISH
Pharmaceuticals

- 16,800 scheduled outbound calls per month
- 14,800 orders generated from these calls
- Over 850 trading accounts each month
- Twice-daily deliveries

* IMS Data September 2014