

2025 MID-YEAR REPORT



Neighbourhood
Pharmacy
Association of Canada
Shaping the way forward



Association canadienne
des pharmacies
de quartier
Façonner l'avenir



As we mark the halfway point of 2025, we're taking this opportunity to reflect on our progress towards *Prescription for Success*,

Neighbourhood Pharmacies' five-year strategic plan.

This plan is more than a roadmap—it's a shared commitment to building a stronger, more integrated future for pharmacy in Canada. Thanks to the continued engagement and leadership of our Members and Partners, we're off to a strong start.

Already this year, we've made meaningful strides across all three pillars of *Prescription for Success*: advancing bold advocacy, strengthening pharmacy business success, and positioning the sector for long-term innovation and integration.

Our advocacy continues to deliver meaningful results—protecting pharmacy margins, strengthening sector sustainability, and elevating pharmacy's role in Canada's health system. This year, we launched and mobilized the [#PharmacyStrong Election Platform](#) and convened a national policy roundtable, *Seizing the Moment*, bringing Members, Partners, grassroots advocates, and federal MPs together to align pharmacy priorities with national policy goals and shape the future of care.

We also successfully mobilized the sector and supply chain to prevent retaliatory tariffs on pharmaceuticals, safeguarding \$8.3B in prescription drugs dispensed through pharmacies and averting major cost and supply disruptions. These achievements reflect our

focus on bold advocacy and business success—delivering real value to Members while building long-term influence for pharmacy's future.

This progress reflects a strategic shift in our advocacy—looking beyond today's challenges with a clear 20-year vision for pharmacy's evolving role in care delivery. With this long-term perspective, we are actively building strong relationships and trust with decision-makers, regulators, and system partners. By consistently demonstrating our expertise, we're positioning pharmacy as an essential and trusted healthcare partner. This work—and the connections we're forging—will be critical to turning our vision for the future into reality.

We're also growing in reach and perspective. So far this year, we have welcomed 5 new Member pharmacies, 2 new Pharmacy Partners and 19 new Partners from across the pharmacy sector—each bringing fresh insight and experience to our shared work. That diversity strengthens our voice and ensures our advocacy reflects the full scope of the sector.

The next half of the year is about momentum—maintaining it, building on it, and ensuring our efforts continue to unlock real opportunities for our Members and better access to care for Canadians. Thank you for being part of this work. I'm excited for what lies ahead—and for what we'll continue to accomplish together.

SANDRA HANNA, RPH., LLM, ICD.D

Chief Executive Officer

Neighbourhood Pharmacy Association of Canada

OUR NORTH STAR

How we help our Members achieve their ultimate goal

Integration of innovative pharmacy business models into the healthcare system, enhancing access to care for Canadians while driving business success.



VISION

Thriving pharmacy businesses supporting optimized patient outcomes.

MISSION

Driving innovation and integrated services for a sustainable future in community pharmacy.

CORE VALUES

INCLUSIVE • INNOVATIVE • CATALYSTS • FUTURISTS

Building value with our Members through leadership, advocacy, and research

Raise our voice, shine a light on issues, and convene stakeholders to help our Members tackle the complex systemic problems that prevent them from delivering the most value into Canada's healthcare system.



Strategic initiative

Create and execute a proactive multi-pronged advocacy strategy focused on business success and enablers



How we will measure success

- ✓ **Improve long-term economic viability** of pharmacies through modernized funding and streamlined operations
- ✓ **Policymakers, payors and other stakeholders recognize** the need for a thriving pharmacy sector and engage Neighbourhood Pharmacies on issues impacting pharmacy business



Progress and achievements

- ✓ **Launched and mobilized the #PharmacyStrong Election platform** and national policy roundtable *Seizing the Moment*, engaging Members, Partners, grassroots advocates and federal MPs, elevating our influence, in alignment with national policy goals, to shape the future of pharmacy in Canada
- ✓ **Shaped national pharmacare policy to protect pharmacy sustainability** to help limit the scope of single-payor pharmacare,

- reducing potential pharmacy impact from \$1B to \$43M
- ✓ **Mobilized sector and supply chain to prevent retaliatory tariffs** on pharmaceuticals impacting potentially \$8.3B in prescription drugs dispensed at pharmacies and averting major cost and supply disruptions
- ✓ **Influenced Patented Medicine Prices Review Board (PMPRB) guidelines**, securing HIP criteria, extending the transition period and pausing momentum amid trade risks—reducing potential pharmacy impact from \$114M to \$83M

- ✓ **Influenced the adoption of a balanced Preferred Provider Network (PPN) policy approach** beyond pharmacy-only regulation; recognizing system complexity and protecting informed patient choice
- ✓ **Influenced early approaches to staffing scores and sector communication** in Staffwise program with Nova Scotia College of Pharmacists

#pharmacySTR+NG



Strategic initiative

Support the futurization of the business of pharmacy



How we will measure success

- ✓ **Identify, lead and mobilize trends** for long-term success
- ✓ **Map progress on identified trends** for long-term business success



Progress and achievements

- ✓ **Published a robust evidence base on the value of central fill** as a key enabler to pharmacy business success in the Neighbourhood Pharmacy Gazette—providing a foundation to support future policy change and sector innovation
- ✓ 53% of our new Partners represent the **technology and innovation sector** to support Members in leveraging emerging trends and accelerating business growth

Building value for Members through tools, programming, and knowledge

As vibrant pharmacies are vital for the best patient outcomes, intelligently and confidently bring the focus on the business success of our Members into balance with the future of Canada's healthcare.



Strategic initiative

Be recognized as the voice of pharmacy business and operations



How we will measure success

✓ **Members, Partners, governments,** and other stakeholders seek out Neighbourhood Pharmacies as pharmacy business experts



Progress and achievements

- ✓ **Led national and international advocacy** through 9 pharmacy coalitions and partnerships, including executive leadership at the Adult Vaccine Alliance
- ✓ **Hosted 3 Member and Partner engagement events** including our inaugural marquee policy roundtable—an exclusive, high-impact forum for Members and Premium Partners

- ✓ **Increased Neighbourhood Pharmacy Gazette subscriptions by 10% year-to-date**, expanding the reach of our flagship digital magazine and strengthening our thought leadership and mobilization
- ✓ **Recorded a 28.5% year-to-date increase in social media engagement alongside a 7% growth in followers**—broadening our community and deepening connections with Members and Partners

Policy Roundtable at Pharmacy EXPO:

"Great initiative from Canada's pharmacy sector in seeking urgent action and collaboration with the new federal government for advancing healthcare solutions and strengthening the system, excited to see progress and positive outcomes ahead."

MP visiting pharmacy during election campaign

"Thank you for the conversation and your advocacy. Local pharmacies are important small businesses and on the frontlines."



Strategic initiative

Be the source for evidence-informed assets to support our Members' business success



How we will measure success

✓ **Members and Partners rely on Neighbourhood Pharmacies** for resources that inform business strategies and advocacy efforts



Progress and achievements

- ✓ **Published three financial impact analyses on health policy changes**, strengthening our reputation as the go-to authority on pharmacy business intelligence
- ✓ **Enhanced our signature publications**—*Pharmacy Services and Remuneration*, *Horizons Economic and Pharmaceutical Outlook*, and *Pharmacy Market Insights*—with more timely, targeted insights, directly aligned to Member and Partner feedback on topical issues, cadence, and relevance
- ✓ **Provided timely, actionable insights on federal and provincial policy changes**, equipping Members with clear analysis of sector impacts and our strategic advocacy response
- ✓ **Featured as keynote speakers at 13 Member, Partner and Stakeholder events**, reinforcing our leadership in advancing the business of pharmacy

PHARMACY May 13-15 • 2025
EXP 30 YEARS
13-15 mai • 2025 PHARMACIE

22% overall growth
23 first time vendors
95% of Members attended
96% of Premium Partners attended
76% of Associate Partners attended

Leading the sector through foresight and change management

Be a future-forward guide to the sector on its position in the Canadian healthcare system through the next 20 years.



Strategic initiative

Fuel long-term growth and resilience



How we will measure success

✓ **Sustain long-term growth** through revenue diversification, expanded membership, and strategic execution

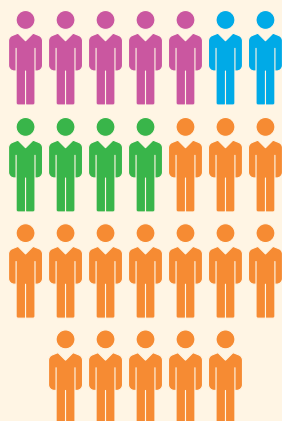


Progress and achievements

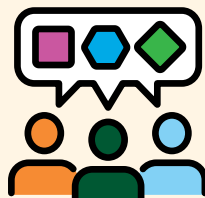
Growth



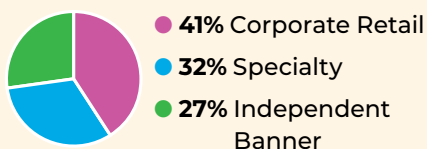
- 5 new Member pharmacies
- 2 new Pharmacy Partners
- 4 new Premium Partners
- 15 new Associate Partners



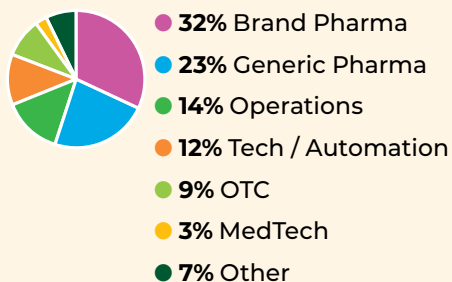
Diversification



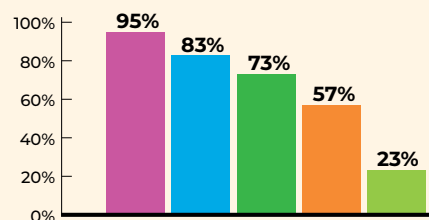
MEMBERS (BY CATEGORY):



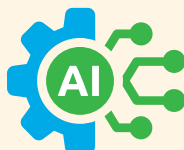
PARTNERS (BY CATEGORY):



Increase in Engagement in Association Activities



- 95% of Members participated in Pharmacy EXPO
- 83% of Partners participated in Pharmacy EXPO
- 73% of Members attended the policy roundtable at Pharmacy EXPO
- 57% of Premium Partners attended the policy roundtable at Pharmacy EXPO
- 23% of Premium Partners have had leadership presentations / engagements



We've advanced our digital modernization strategy with new AI tools—improving how we deliver service today and building the foundation for a more seamless and personalized Member and Partner experience