

NEIGHBOURHOOD PHARMACIES

2025 Impact Report



Shaping the way forward

Together for patient care

2025 was a year of action and impact for Neighbourhood Pharmacies. We delivered meaningful results, advanced strategic progress to modernize the pharmacy sector, and demonstrated leadership in positioning pharmacies as essential healthcare and economic engines in communities across Canada.



Neighbourhood
Pharmacy
Association of Canada
Shaping the way forward



Association canadienne
des pharmacies
de quartier
Façonner l'avenir

Turning Momentum into Meaningful Change



As we close out 2025, I am proud to reflect on a year that marked both a pivotal new chapter for Neighbourhood Pharmacies and a significant milestone in our history.

The launch of *Prescription for Success: 2025-2029* coincided with our 30th anniversary as an Association, providing a timely opportunity to apply three decades of experience as we shape the future of pharmacy.

In 2025, our advocacy focused on translating strategy into sustained influence, anchored in four core pillars: data-driven advocacy, strengthening the public narrative around pharmacy, direct engagement with governments, and mobilizing Members around shared priorities.

We invested in evidence and insight to ground policy discussions in the realities of pharmacy practice and the value pharmacies deliver to patients, the health system, and the economy. At the same time, we elevated the visibility of pharmacy-led care and reinforced public trust, ensuring pharmacy's role was clearly understood within a rapidly evolving healthcare landscape. Through consistent, informed engagement with governments, we helped shape policy conversations at critical moments, with a clear focus on access, sustainability, and patient-centered care.

Equally important was the alignment and activation of our Members. By supporting pharmacies to share their real-world experiences and patient

impact, we strengthened our collective voice and expanded the reach and influence of our advocacy across the country.

Together, these efforts positioned Neighbourhood Pharmacies as a credible, solutions-oriented partner, able to influence policy, advance system change, and support Members as the sector continues to evolve.

Connection and collaboration remained central to our approach. Our signature events, Pharmacy EXPO and the Specialty Pharmacy Summit, continued to grow in scale and impact, convening Members, Partners, patients, and sector leaders for meaningful dialogue about the future of pharmacy and reinforcing the strength of our community.

As we look ahead, progress achieved in this first year of *Prescription for Success* confirms that our priorities are the right ones. Pharmacies are already helping to close critical gaps in primary care, public health, and complex care. Our focus now is on accelerating that impact by advancing the policies, funding models, and system integration needed to enable pharmacies to do even more for patients and communities. Building on 30 years of momentum, together we are shaping a future where pharmacies are empowered to deliver accessible, high-quality care for Canadians, now and in the years ahead.

SANDRA HANNA, RPh., LLM, ICD.D

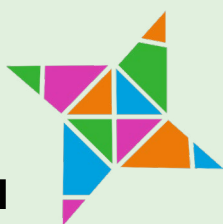
Chief Executive Officer

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

- ✓ **Strengthened evidence-driven advocacy across priority policy areas by:**
 - Publishing national public opinion polling on expanded pharmacy services
 - Launching a new partnership to deliver regularly updated economic footprint data for the pharmacy sector
- ✓ **Protected the pharmacy supply chain, safeguarding patient access to medications and sector stability by:**
 - Helping prevent \$8.3B in retaliatory tariffs on prescription drugs
 - Delaying costly regulatory changes related to shortages and stock requirements
 - Reducing the projected impact of PMPRB guidelines on pharmacy from \$114M to \$83M, while also securing a temporary pause on PMPRB implementation during tariff risk assessment
- ✓ **Shaped national pharmacare to mitigate risk and reinforce pharmacy sustainability by:**
 - Ensuring pharmacy perspectives were reflected in federal-provincial negotiations
 - Reducing projected pharmacare losses from \$1B under comprehensive coverage to \$43M when limited to two drug categories
- ✓ **Advanced pharmacy-delivered care, scope of practice and patient access in Ontario by:**
 - Supporting the addition of 14 minor ailments to pharmacists' prescribing authority
 - Advancing integration of lab and point-of-care testing
 - Supporting new publicly funded vaccines and expanded technician vaccine administration
 - Continuing dialogue toward broader pharmacy-based vaccination programs
- ✓ **Protected informed patient choice and a diverse and thriving pharmacy sector by:**
 - Supporting the elimination of closed Preferred Pharmacy Networks in Ontario
 - Advancing a shift toward an operational-services based regulatory approach focused on quality care delivery
- ✓ **Advocated for measures that would increase workforce supply and capacity by:**
 - Calling for removal of pharmacy labour mobility barriers
 - Advancing discussions on accelerated foreign credential recognition
 - Supporting Ontario's expansion of "As of Right" regulation to include pharmacists
- ✓ **Reduced administrative burden on pharmacy operators and modernized system requirements by:**
 - Influencing Health Canada's move to digitize patient information leaflets
 - Advancing modernization of the pharmacy claims standard
 - Supporting adoption of 2D barcodes to enable end-to-end supply chain traceability

Building value with our Members through leadership, advocacy, and research *continued...*



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

- ✓ **Established a stronger data foundation to enable future-ready decision-making by:**
 - Implementing modernized data systems and analytics across the Association
 - Improving how Member insights are captured, structured, and applied
 - Strengthening the ability to identify emerging trends, measure engagement, and guide strategic priorities
- ✓ **Positioned pharmacies to leverage technology, automation, and AI as drivers of sustainability and growth by:**
 - Advancing evidence-based thought leadership on automation, including central fill
 - Introducing practical AI applications for pharmacy operations through the Specialty Summit
 - Expanding engagement with new partner categories to inform future innovation and growth opportunities



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

- ✓ **Strengthened national influence by positioning the Association as a trusted voice on the business of pharmacy through:**
 - **11 speaking engagements** across pharmacy, healthcare, and international forums
 - Active participation in **eight multi-stakeholder advocacy collaborations** advancing shared priorities
 - A **48% increase in media engagement**, reflecting growing demand for our perspective
- ✓ **Advanced sector-wide thought leadership through the Neighbourhood Pharmacy Gazette by:**
 - Securing a **19% increase in readership** and **22% growth in downloads**
 - Aligning each 2025 edition to timely, high-impact issues, including value-based care, central fill and operational scalability, evolving funding models, and the Association's 30-year contribution to pharmacy's evolution
- ✓ **Expanded digital reach and engagement to increase visibility and accessibility by:**
 - Growing **website traffic by 53%** while maintaining a strong **78% engagement rate**, with heightened engagement around federal election content
 - Expanding our **social community by 14%**, demonstrating strong stakeholder demand for timely, relevant insights



Building value for Members through tools, programming, and knowledge *continued...*



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

✓ **Delivered high-value business intelligence to support informed decision-making by:**

- Publishing **10 reports** on pharmacy data, trends, and analysis
- Strengthening flagship assets, including the *Pharmacy Services & Remuneration Report*
- Driving a **32% increase in Member downloads and satisfaction**
- Laying the foundation for a comprehensive business insights strategy to ensure content remains accessible, actionable, and future-ready

✓ **Provided timely policy intelligence and tools to empower Members and strengthen advocacy by:**

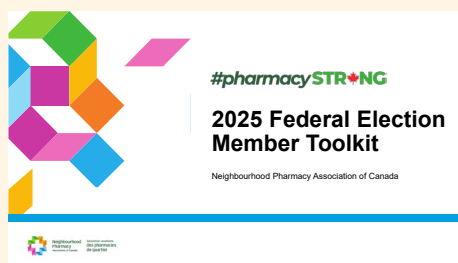
- Delivering **12+ major policy announcements and impact analyses**, including **three in-depth financial assessments**
- Launching **five new advocacy toolkits**
- Preparing **25+ frontline advocates** for Lobby Day and ongoing grassroots engagement

✓ **Strengthened Member and Partner engagement through high-impact forums and insights by:**

- Hosting **eight in-person and virtual events** with **75%+ Member participation**
- Shifting to more targeted, agile formats aligned to Member needs
- Delivering record-breaking sessions on pharmaceutical trends, emerging policy, election preparedness, and market insights

✓ **Enhanced digital communications and tools to expand reach and impact by:**

- Upgrading platforms to enable more dynamic, targeted outreach
- Improving access to resources and strengthening analytics
- Supporting increased visibility, deeper engagement, and year-over-year growth in Member and Partner interactions



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



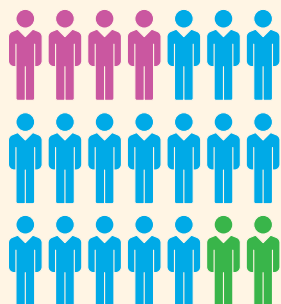
Progress and achievements

Growth



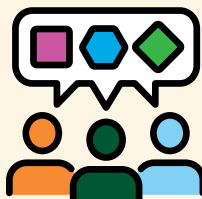
✓ Onboarded **21 new Partners** in 2025, including:

- 4 Premium Partners
- 15 Associate Partners
- 2 Pharmacy Partners



✓ **63** total partners, including Premium, Associate and Pharmacy Partners.

Diversification

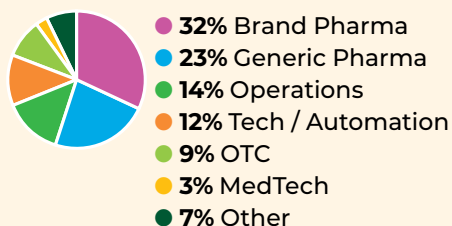


✓ Continued to expand Partner diversification, with emphasis on the **OTC** and **technology** sectors.

MEMBERS (BY CATEGORY):



PARTNERS (BY CATEGORY):



Events and Member Engagement



PHARMACY EXPO:

- ✓ Sold out exhibit space
- ✓ Achieved **22% overall growth**
- ✓ Significant increase in **first-time companies and attendees**

SPECIALTY PHARMACY SUMMIT:

- ✓ **10% overall growth**
- ✓ Largest attendance to date

ACROSS BOTH EVENTS:

- ✓ **Two timely and exclusive roundtables** addressed key issues
- ✓ Strong focus on **patient experience** enhanced impact



Modernized IT infrastructure and digital systems to improve user experience and engagement, driving greater value for Members and Partners, while also laying the foundation for automation, emerging technologies, and long-term operational scalability.

Looking Ahead: Year Two of the Strategic Plan

As we enter the second year of ***Prescription for Success***, we are building on the momentum of 2025, fully committed to driving our Strategic Plan forward and positioning community pharmacy as a critical engine in both Canada's health system and economy.

Key priorities ahead include:

- **Advancing a future-focused advocacy agenda** to accelerate business and regulatory modernization, ensuring pharmacies are empowered to deliver high-quality, sustainable care.
- **Expanding and refining business intelligence assets** to equip Members with actionable insights that drive operational excellence and strategic decision-making.
- **Accelerating innovation across digital, data, and operational platforms**, enabling pharmacies to leverage emerging technologies and transform business models for long-term growth.
- **Strengthening partnerships and amplifying the national voice of pharmacy business**, enhancing influence, collaboration, and sector-wide impact.

Together, we will continue to shape a sustainable, innovative, and thriving future for community pharmacy in Canada, building on 30 years of momentum to deliver measurable value for Members, Partners, patients, and the health system.



About

Neighbourhood Pharmacies

Neighbourhood Pharmacies is a national, not-for-profit trade association that delivers insights and solutions as a knowledgeable, experienced stakeholder and sought-after thought leader in public health, primary care, and policy development.

With a distinct, pan-Canadian perspective on the frontlines of healthcare and a high-performing leadership role in community health, we are the voice of the pharmacy business in Canada, representing our member organizations as a trusted partner to government within and across jurisdictions.

We represent pharmacy organizations with varied business models, including chain, banner, grocery, specialty, long-term care, and mass merchandisers with pharmacies. We leverage the diverse strength of our Members and Partners, including the pharmaceutical supply chain and manufacturers, and work together with the common policy objective to improve access to healthcare. Our Association represents the delivery of care through more than 12,000 pharmacies, where pharmacy

teams serve as integrated healthcare hubs, creating capacity in local communities across Canada. Our purpose is to advocate for community pharmacy's potential to improve Canadians' health and contribute as sustainable partners to the shared vision of a robust, resilient health system.

The Members and Partners of the Association are at the forefront of influencing positive change for our innovative, growing sector. Our Association exists for one reason: to make pharmacies stronger so that they can excel as Canadians' community hub for primary care and public health. And when our sector plays a strong leading role – together – we can contribute so much more to the health and well-being of Canadians from coast to coast to coast.

Our sector is rapidly changing and growing. Bring your voice to the table, network with peers, grow your business, and impact the health and well-being of Canadians locally and nationally by joining or renewing with Neighbourhood Pharmacies today.



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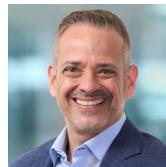
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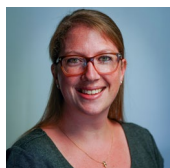


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SANDRA HANNA, RPH., LLM, ICD.D
Chief Executive Officer



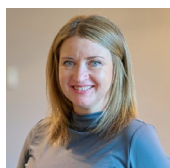
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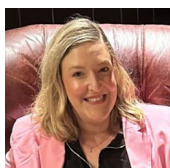
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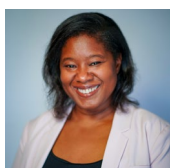
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