

Chain Drug Review

A woman's role in a women's movement

David Pinto, Editor

Jeffrey Woldt, Vice President/
Editorial Director
Phone: 212-699-2326
Fax: 212-725-4594
jwoldt@racherpress.com

Geoff Walden, Executive Editor
212-699-2313
gwalden@racherpress.com

Mark Wolz, Copy Editor
212-699-2330
mwolz@racherpress.com

Stephanie Thompson,
Desk Editor
212-699-2323
stthompson@racherpress.com

Brian Bossetta, Senior Editor
212-699-2376
bbossetta@racherpress.com

Bill Schiffner, Senior Editor
(212) 699-2307
bschiffner@racherpress.com

Susan Schinitzky, Publisher

Rick Kolinsky, Southeast
Director, Sales
908-884-4592
rkolinsky@racherpress.com

Christopher Stanton,
Midwest/West Director, Sales
Phone: 512-829-5663
Fax: 512-263-5886
cstanton@racherpress.com

Andrea Fallin, Northeast
Director, Sales
212-699-2321
afallin@racherpress.com

Peggy Navarre,
Production Manager
Phone: 212-699-2371
Fax: 212-725-4594
pnavarre@racherpress.com

Pam Vandernoeth,
Circulation Manager
Phone: 212-699-2362
Fax: 212-725-4594
pvandernoeth@racherpress.com

Clare Green, Art Director
212-213-6000

Bill Buckley, Art Director
212-699-2331
bbuckley@racherpress.com

Joseph Colucci,
Art Director
212-699-2397
jcolucci@racherpress.com

Published by Racher Press Inc.
126 Fifth Ave., 12th Floor
New York, N.Y. 10011
212-213-6000

David Pinto, President

Susan Schinitzky,
Secretary/Treasurer

By David Pinto

This is a story about Andrea Fallin, a senior executive at Racher Press, publisher of *Chain Drug Review*. Andrea works on the business side of the business, among those responsible for the advertising revenue that supports *CDR* and facilitates much of the groundbreaking editorial coverage we like to believe we provide.

Two years ago Andrea articulated the concept that women have an opportunity to play a more critical role in chain drug retailing, on both the retailer and supplier sides of the enterprise. Her vision was that senior executives on both sides of the equation should meet, once, to explore the potential that women offered for a broader role in the chain drug community. The result today is WE, an organization headed by Andrea that is even now exercising an impact on our industry. WE is light years beyond the one-time meeting that Andrea envisioned. The organization meets periodically, at every industry event — most recently at NACDS' Total Store Expo in Boston — to explore ideas for expanding the role that women could rightfully and reasonably play in our industry. Industry leaders of both genders are even now beginning to take note of the comings and goings of this unique and already powerful group.

But though WE has only just begun, it has already developed a history and exerted an impact of its own, one which other industry groups would do well to emulate.

In organizing and leading WE, Andrea was not interested in personal glory or advancement. Her goal was to advance the impact women should likely and logically exert on an industry in which they have long toiled

and influenced, too often, in her view, anonymously.

To explore the potential of women, Andrea reached out to her industry friends and associates, with whom she had already developed relationships to a remarkable degree. Making no distinction between retailers and suppliers, she contacted friends at such organizations as Walmart, Rite Aid, Target, Walgreens, Unilever, GSK Consumer Health, Kellogg the Emerson Group and Hello. The like-minded business leaders she contacted immediately recognized the need for an organization of female leaders whose goal, as they envisioned it, would be to give women a voice commensurate

with their impact. So began a journey that has already elevated this talented and proactive group to a status shared by very few organizations within chain drug retailing.

WE can be a model for other groups.

WE, having recently convened its Boston meeting, is already busily planning its next session, scheduled in New York City in December, to coincide with the NACDS meetings. Its role there, as it has been to date, will be to supplement, enhance and sim-

plify the industry's agenda, primarily by furnishing fuel, in the form of new directions and new opportunities, that chain drug retailing has sometimes been too myopic or too preoccupied to pursue.

Don't misunderstand. This is not a group of women looking to insert themselves into an industry that has, perhaps inevitably, been too long dominated by men. Rather, it is a group that loves and respects the industry it serves, and, in that capacity, is reaching out as a resource, telling that industry's male counterparts that WE is willing and more than able to influence a business that perhaps has for too long lacked a woman's touch.

Retail imports surge ahead of tariffs

WASHINGTON — Imports at the nation's major retail container ports reached unusually high numbers just before new tariffs on goods from China took effect September 1, and they are expected to surge again before another round of tariffs takes effect in December, according to the monthly Global Port Tracker report released recently by the National Retail Federation (NRF) and Hackett Associates.

"Retailers are still trying to minimize the impact of the trade war on consumers by bringing in as much merchandise as they can before each new round of tariffs takes effect and drives up prices," NRF vice president for supply chain and customs policy Jonathan Gold said. "That's the same pattern we've seen over the past year, but we're very quickly going to be at the point where virtually all consumer goods will be subject to these taxes on American families. The upcoming October talks with China are an oppor-

tunity to put a stop to this escalation, repeal the tariffs that have been imposed and focus on growing the economy."

New 15% tariffs on a wide range of consumer goods from China took effect at the beginning of this month and are scheduled to be expanded to additional goods on December 15 — covering a total of about \$300 billion in imports. In addition, 25% tariffs on \$250 billion worth of imports already imposed over the past year will increase to 30% on October 1.

"The tariff war with China closely resembles a poker game, with each country continually upping the ante," Hackett Associates founder Ben Hackett said. "As each side eyes its hand, things can only get worse."

U.S. ports covered by Global Port Tracker handled 1.96 million Twenty-Foot Equivalent Units (TEUs) in July, the latest month for which after-the-fact numbers are available. That was up 9.1% from June and up

2.9% year over year. A TEU is one 20-foot-long cargo container or its equivalent.

Numbers were high again in August, estimated at 1.93 million TEUs, which was up 1.8% year over year. September is forecast at 1.85 million TEUs, down 0.7% from last year; October at 1.92 million TEUs, down 5.5%; November at 1.97 million TEUs, up 8.8%; and December at 1.77 million TEUs, down 9.8%.

Likely driven by the new tariffs scheduled for December, November's 1.97 million TEUs would be the highest monthly total since the record 2 billion TEUs seen in October 2018.

The first half of 2019 totaled 10.5 million TEUs, up 2.1% over the first half of 2018, and 2019 is expected to see a new record of 21.9 million TEUs. That would be up 0.7% from last year's previous record of 21.8 million TEUs, which rose 6.2% over 2017.

January 2020 is forecast at 1.81 million TEUs, down 4.5% from January 2019.

Walmart seeks shift in health care paradigm

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"Individual physicians and dentists have expressed concern until we explain what we are trying to achieve," he admits, "then they, along with health care systems and some insurers, see the potential value. Walmart has the capacity to meet a community's primary care needs. A new patient in Paulding County, where the Dallas Supercenter is located, might have to wait weeks or even months before he or she can see a doctor or dentist; that person can walk into our store and receive attention right away.

"For a health system, we can remove the burden of maintaining a primary care network, which can be very costly, and serve as a feeder system for pa-

tients who need a higher level of care, enabling them to make better use of their resources. Insurers are beginning to understand that Walmart's increased

A patient can be seen immediately.

involvement in the market will drive the price of care down, and ultimately that's good for everyone."

Slovenski acknowledges that once the pilot stores have proven their worth — a process that he expects to involve a fair share of trial and error — some companies in the current continuum of care will be disintermediated. "That process is in-



The new format has the capacity to fulfill primary care needs.

evitable if we, as a country, are going to get health care costs under control," he says. "We can no longer afford to compensate anyone at a higher rate than the value they provide."

If all goes according to plan, Walmart stands ready to propa-

gate the format.

"We've put together a team that draws on the company's traditional strengths along with some new skills," Slovenski says. "That combination will enable us to bring health care to all the communities we serve."