

Financial Analysts Consensus 2023 - 2025 Galenica Group

07.09.2023

in million CHF	2022 A (as reported)	Elimination Mediservice	2022 A (continuing)	Number of estimates	Consensus 2023 E	Change	Highest 2023 E	Median 2023 E	Lowest 2023 E
Net Sales	4'014.3	425.8	3'588.5	7	3'753.1	4.6%	3'771.8	3'755.3	3'708.7
Products & Care	2'029.6	445.9	1'583.7	7	1'665.4	5.2%	1'696.3	1'663.7	1'645.5
Logistics and IT	2'933.3	-	2'933.3	7	3'072.9	4.8%	3'106.5	3'072.0	3'037.2
Corporate & Elimination	-948.6	-20.0	-928.6	6	-985.8	6.2%	-947.4	-979.9	-1'038.0
EBIT adjusted ¹⁾	200.8	10.2	190.6	8	196.0	2.8%	203.5	195.0	189.8
ROS	5.0%		5.3%		5.2%		5.4%	5.2%	5.1%
Products & Care ROS	153.5 7.6%	10.2	143.3 9.0%	7	152.1 9.1%	6.1%	156.9 9.2%	151.9 9.1%	146.4 8.9%
Logistics and IT ROS	49.2 1.7%	-	49.2 1.7%	7	47.1 1.5%	-4.2%	53.7 1.7%	46.1 1.5%	41.4 1.4%
Corporate & Elimination	-1.9	-	-1.9	7	-3.9	102.7%	0.1	-2.2	-13.3
Net profit adjusted ¹⁾	165.7	8.5	157.2	8	159.2	1.3%	167.2	158.3	152.7
Investments in tangible and intangible assets <i>in % of net sales</i>	70.7 1.8%	0.5	70.2 2.0%	7	66.3 1.8%	-5.6%	70.5 1.9%	70.0 1.9%	59.3 1.6%
Dividend per share (in CHF, paid in the following year)	2.20		2.20	7	2.25	2.4%	2.30	2.25	2.20

1) Excluding the effects of IAS 19 and IFRS 16

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in million CHF	Consensus 2023 E	Number of estimates	Consensus 2024 E	Change	Highest 2024 E	Median 2024 E	Lowest 2024 E
Net Sales	3'753.1	7	3'864.2	3.0%	3'895.2	3'879.0	3'800.5
Products & Care	1'665.4	7	1'730.9	3.9%	1'756.0	1'725.6	1'704.5
Logistics and IT	3'072.9	7	3'148.5	2.5%	3'206.9	3'158.6	3'085.8
Corporate & Elimination	-985.8	6	-1'011.6	2.6%	-966.3	-1'001.9	-1'062.9
EBIT adjusted ¹⁾	196.0	8	213.4	8.9%	220.2	216.4	196.8
ROS	5.2%		5.5%		5.7%	5.6%	5.2%
Products & Care	152.1	7	161.4	6.2%	168.3	160.6	158.3
ROS	9.1%		9.3%		9.6%	9.3%	9.3%
Logistics and IT	47.1	7	55.9	18.6%	60.0	55.7	52.9
ROS	1.5%		1.8%		1.9%	1.8%	1.7%
Corporate & Elimination	-3.9	7	-3.5	-10.2%	0.1	-1.0	-17.3
Net profit adjusted ¹⁾	159.2	8	172.7	8.4%	179.0	174.8	157.1
Investments in tangible and intangible assets <i>in % of net sales</i>	66.3 1.8%	7	63.6 1.6%	-4.0%	70.0 1.8%	62.1 1.6%	58.5 1.5%
Dividend per share (in CHF, paid in the following year)	2.25	7	2.35	4.2%	2.45	2.38	2.21

1) Excluding the effects of IAS 19 and IFRS 16

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in million CHF	Consensus 2024 E	Number of estimates	Consensus 2025 E	Change	Highest 2025 E	Median 2025 E	Lowest 2025 E
Net Sales	3'864.2	7	3'963.6	2.6%	4'036.3	3'976.0	3'894.8
Products & Care	1'730.9	7	1'783.3	3.0%	1'828.0	1'779.5	1'735.0
Logistics and IT	3'148.5	7	3'220.4	2.3%	3'281.3	3'225.0	3'135.2
Corporate & Elimination	-1'011.6	6	-1'036.8	2.5%	-985.6	-1'026.8	-1'088.5
EBIT adjusted ¹⁾	213.4	8	224.2	5.0%	236.8	227.8	194.2
ROS	5.5%		5.7%		5.9%	5.7%	5.0%
Products & Care	161.4	7	168.6	4.5%	180.7	167.1	154.5
ROS	9.3%		9.5%		9.9%	9.4%	8.9%
Logistics and IT	55.9	7	59.7	6.7%	64.3	60.1	54.9
ROS	1.8%		1.9%		2.0%	1.9%	1.8%
Corporate & Elimination	-3.5	7	-3.7	7.8%	-0.1	-1.0	-19.0
Net profit adjusted ¹⁾	172.7	8	182.2	5.5%	193.3	184.4	156.7
Investments in tangible and intangible assets	63.6	7	60.9	-4.4%	64.0	61.5	55.0
<i>in % of net sales</i>	1.6%		1.5%		1.6%	1.5%	1.4%
Dividend per share (in CHF, paid in the following year)	2.35	7	2.45	4.4%	2.60	2.50	2.22

1) Excluding the effects of IAS 19 and IFRS 16