

Financial Analysts Consensus 2023 - 2025 Galenica Group

01.03.2024

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	8	3'746.0	4.4%	3'746.0	3'746.0	3'746.0
Products & Care	2'029.6	445.9	1'583.7	8	1'635.6	3.3%	1'635.6	1'635.6	1'635.6
Logistics and IT	2'933.3	-	2'933.3	8	3'077.0	4.9%	3'077.0	3'077.0	3'077.0
Corporate & Elimination	-948.6	-20.0	-928.6	8	-966.6	4.1%	-966.6	-966.6	-966.6
EBIT adjusted ¹⁾	200.8	10.2	190.6	8	191.1	0.3%	194.0	191.2	186.6
ROS	5.0%		5.3%		5.1%		5.2%	5.1%	5.0%
Products & Care ROS	153.5 7.6%	10.2	143.3 9.0%	8	149.4 9.1%	4.2%	151.5 9.3%	149.3 9.1%	148.0 9.0%
Logistics and IT ROS	49.2 1.7%	-	49.2 1.7%	8	44.4 1.4%	-9.7%	47.6 1.5%	44.9 1.5%	40.4 1.3%
Corporate & Elimination	-1.9	-	-1.9	8	-2.7	43.2%	0.2	-2.7	-5.1
Net profit adjusted ¹⁾	165.7	8.5	157.2	8	158.2	0.7%	169.8	157.5	149.7
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%	-5.5%	70.0 1.9%	70.0 1.9%	57.0 1.5%
Dividend per share (in CHF, paid in the following year)	2.20		2.20	8	2.24	1.8%	2.30	2.23	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	3'746.0	8	3'904.9	4.2%	3'964.3	3'896.7	3'878.2
Products & Care	1'635.6	8	1'717.4	5.0%	1'748.6	1'713.7	1'698.1
Logistics and IT	3'077.0	8	3'186.2	3.5%	3'210.9	3'186.3	3'160.1
Corporate & Elimination	-966.6	8	-998.8	3.3%	-966.6	-999.1	-1'023.0
EBIT adjusted ¹⁾	191.1	8	211.6	10.7%	222.9	210.7	203.5
ROS	5.1%		5.4%		5.6%	5.4%	5.2%
Products & Care	149.4	8	159.3	6.6%	169.0	157.4	153.0
ROS	9.1%		9.3%		9.7%	9.2%	9.0%
Logistics and IT	44.4	8	55.9	25.7%	63.6	54.2	52.9
ROS	1.4%		1.8%		2.0%	1.7%	1.7%
Corporate & Elimination	-2.7	8	-3.8	39.4%	-0.3	-2.3	-10.6
Net profit adjusted ¹⁾	158.2	8	172.2	8.8%	180.0	172.5	163.1
Investments in tangible and intangible assets	66.3	7	67.2	1.3%	70.1	70.0	59.4
<i>in % of net sales</i>	1.8%		1.7%		1.8%	1.8%	1.5%
Dividend per share (in CHF, paid in the following year)	2.24	8	2.33	4.1%	2.45	2.32	2.20

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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	3'904.9	8	4'054.6	3.8%	4'148.6	4'039.1	4'002.0
Products & Care	1'717.4	8	1'795.5	4.5%	1'854.6	1'790.7	1'758.8
Logistics and IT	3'186.2	8	3'286.8	3.2%	3'339.3	3'288.3	3'224.4
Corporate & Elimination	-998.8	8	-1'027.7	2.9%	-966.6	-1'036.9	-1'059.5
EBIT adjusted ¹⁾	211.6	8	223.3	5.5%	241.0	221.6	215.5
ROS	5.4%		5.5%		5.8%	5.5%	5.4%
Products & Care	159.3	8	168.1	5.5%	182.0	166.3	159.7
ROS	9.3%		9.4%		9.8%	9.3%	9.1%
Logistics and IT	55.9	8	59.0	5.7%	66.2	58.4	55.9
ROS	1.8%		1.8%		2.0%	1.8%	1.7%
Corporate & Elimination	-3.8	8	-4.0	6.5%	-1.3	-2.2	-11.2
Net profit adjusted ¹⁾	172.2	8	182.2	5.8%	196.0	182.0	173.0
Investments in tangible and intangible assets	67.2	7	68.2	1.5%	72.8	70.0	61.5
<i>in % of net sales</i>	1.7%		1.7%		1.8%	1.7%	1.5%
Dividend per share (in CHF, paid in the following year)	2.33	8	2.43	4.2%	2.60	2.40	2.19

1) Excluding the effects of IAS 19 and IFRS 16