

Care strategic programme

We accompany and support our customers – for their entire lifetime!

Daniele Madonna, Chief Healthcare Officer

Investor Day, 14 October 2021, Interlaken

Galenica – Health and wellbeing are at the heart of what we do.

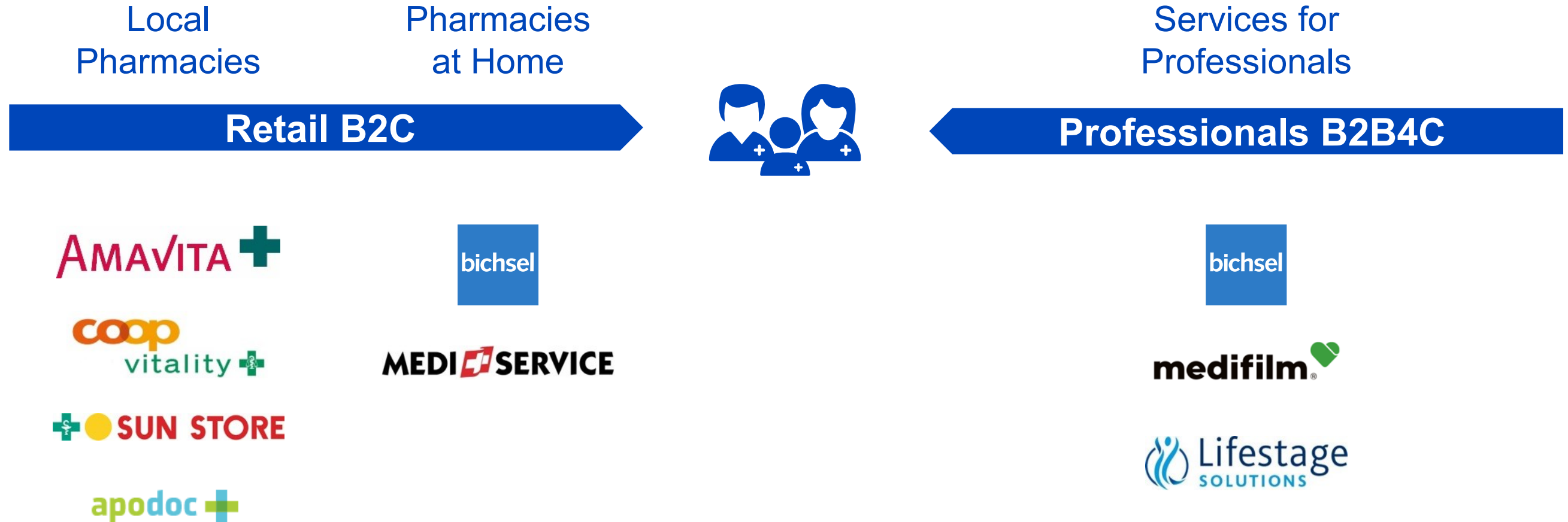
We accompany and support **all people**
At any age! Whether in good health ...



... or on the way to it.



Serving our customers with healthcare services B2C & B2B4C



B2C: Pharmacies

Primary Care – a valuable service



B2C: Pharmacies – Primary Care

a quick, competent and cost-effective solution for customers



Pharmacy

- Easy
- Convenient



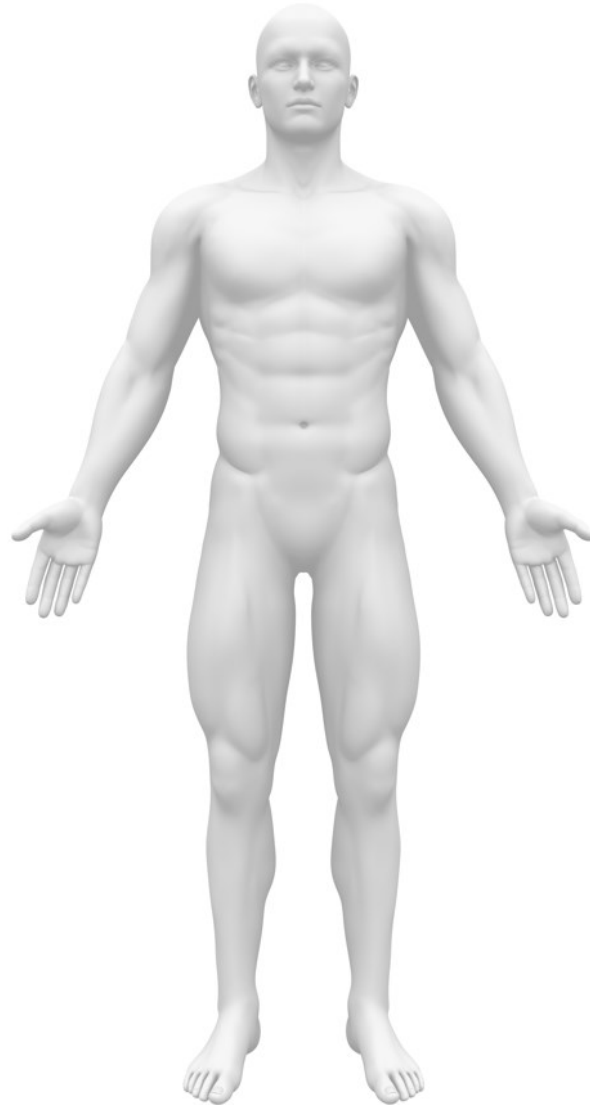
Doctor – Emergency Unit

- 10 times more expensive

B2C: Pharmacies – Primary Care in 2021: 28 indications – some examples

- Urinary tract infections
- Erectile dysfunction
- Constipation
- Acute diarrhoea

- Burns
- Back pain
- Headache

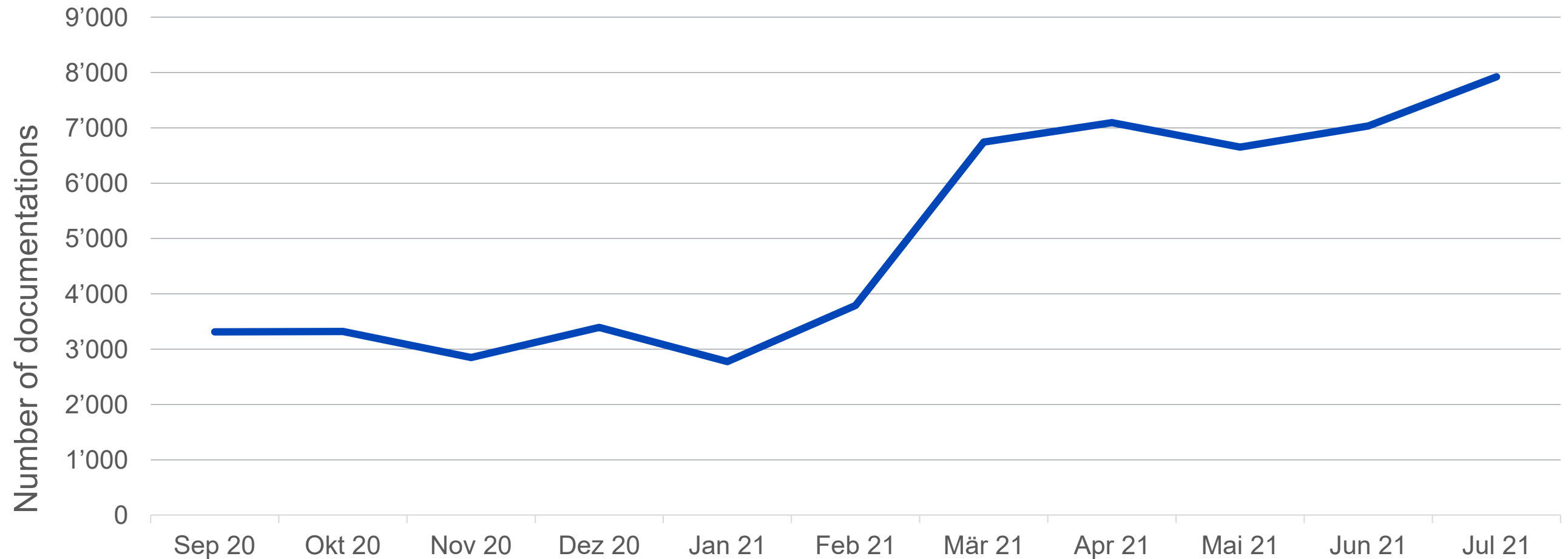


- Allergic rhinitis
- Conjunctivitis
- Sinusitis

- Shingles
- Eczema
- Tick bites
- Skin mycosis
- Acne

B2C: Pharmacies – Primary Care

Increasing demand in 2021



AMAVITA+

+ SUN STORE

coop
vitality+

B2C: Pharmacies OnlineDoctor

A hybrid model connects pharmacies and dermatologists

- Digital health tool for clients with skin problems
- Direct access to dermatologists
- Roll-out of new service to over 110 Amavita pharmacies by the end of 2021

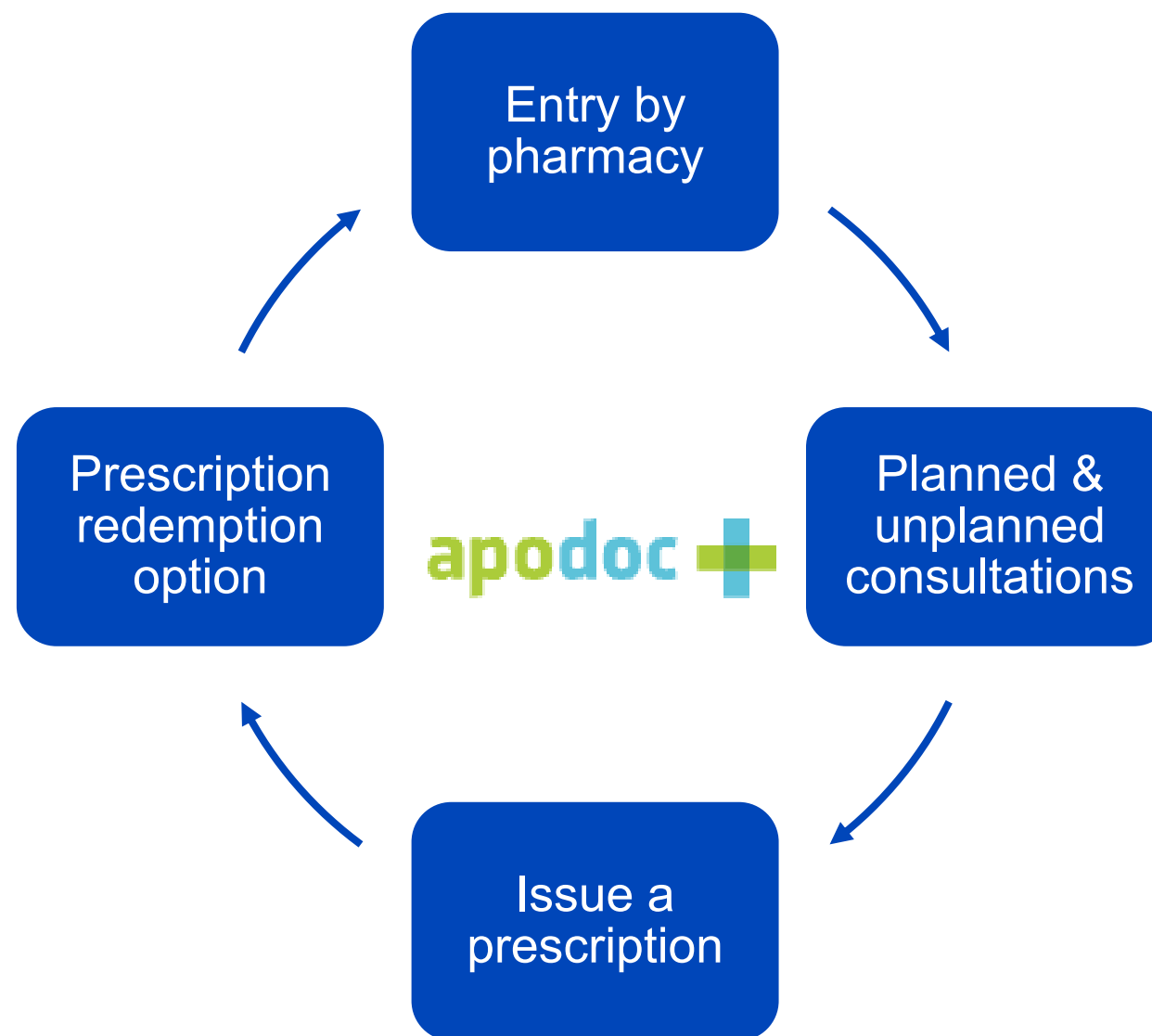


B2C: Apodoc – Pharmacy and medical practice: integrated care and healthcare lab

apo



doc



B2C: Developing more services in cooperation with health insurance companies

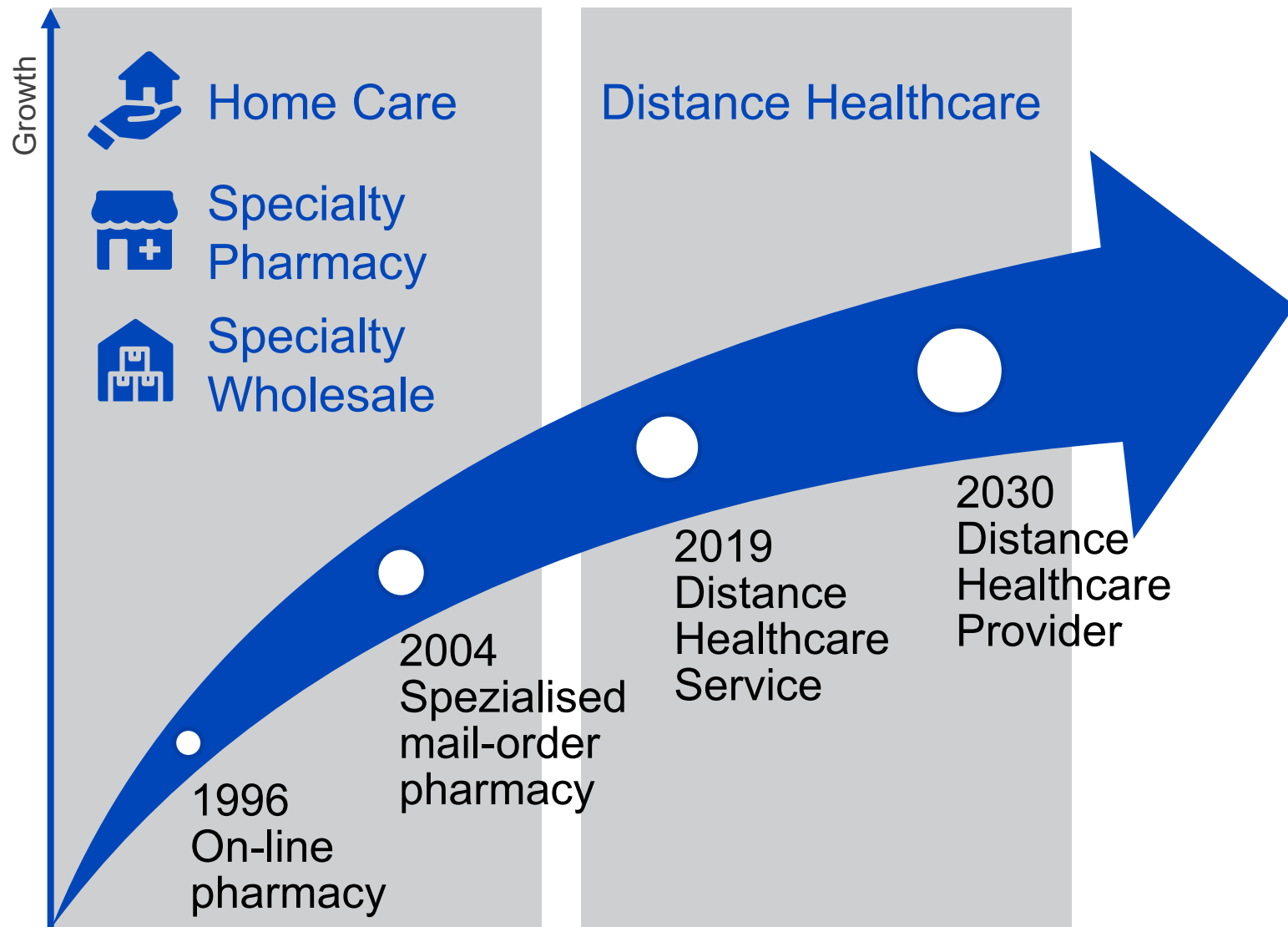


B2C: Mediservice Specialty and Chronic Care



B2C: Mediservice

A Distance Healthcare Provider

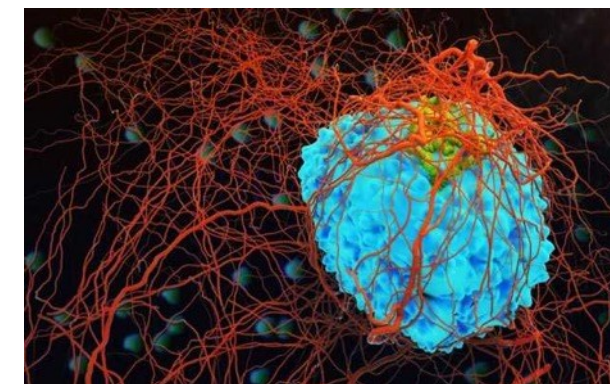


Constantly expanding services, moving from a highly specialised on-line pharmacy to a Distance Healthcare Provider

- Strong focus on Specialty Rx and care for Chronic Patients
- Active in over **50 specialty indications**, especially in neurology, immunology, rare diseases and oncology
- Very high customer satisfaction score 9.3/10

B2C: Mediservice

Leading position with strong growth in specialty indications



Patients on treatment

Multiple sclerosis

Haemophilia

Market in CH

16,000

750

Growth

+7%

+3%

Market share

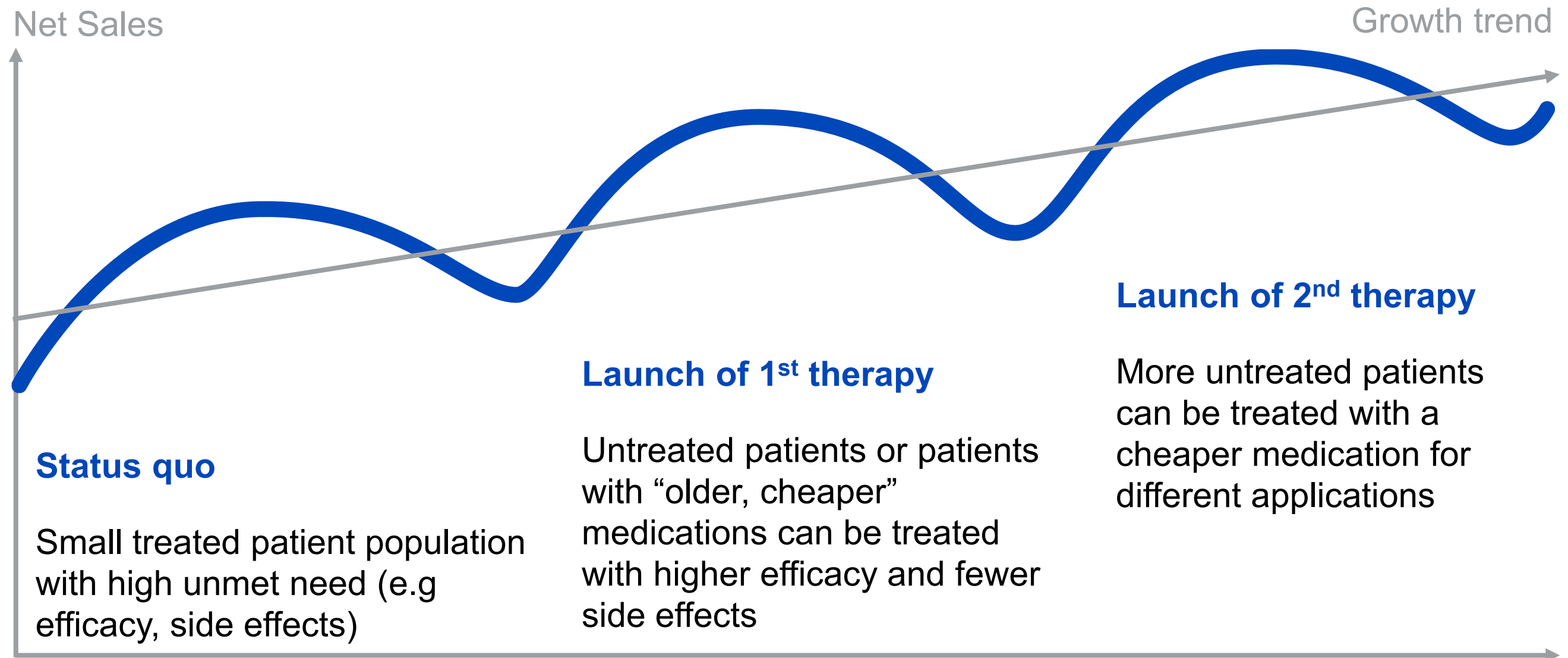
25%

36%

Source: internal assumptions

B2C: Mediservice

Sales driven by new innovative therapies



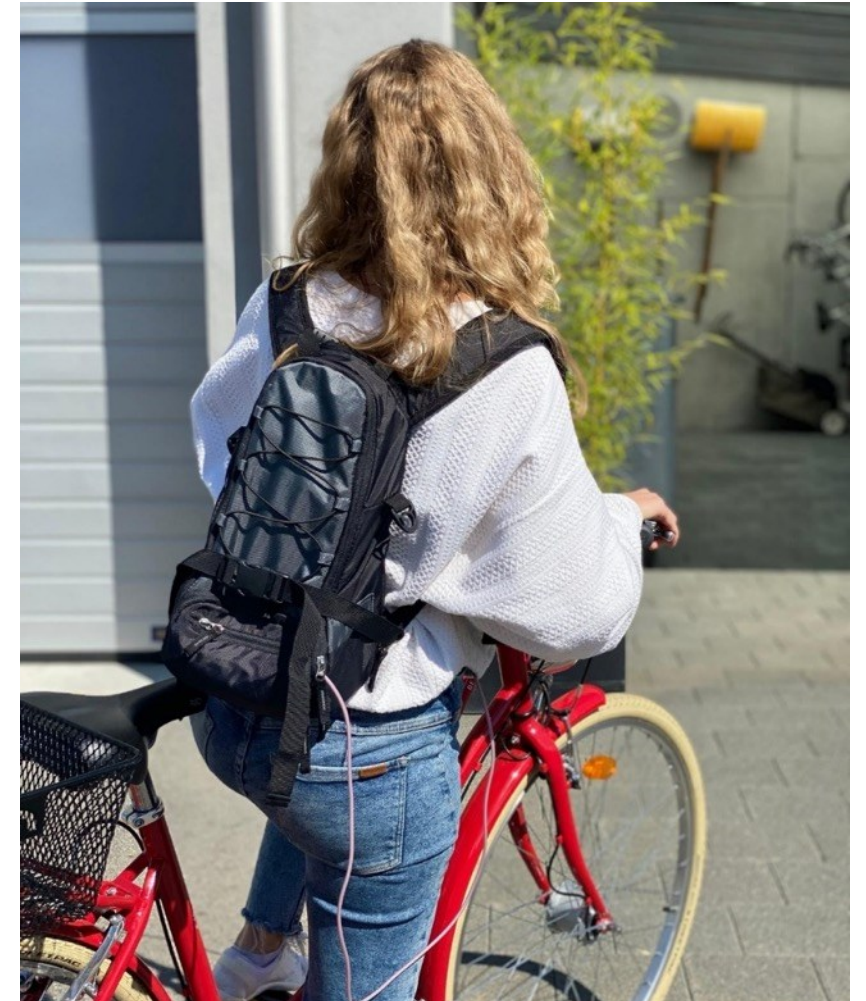
B2C: Bichsel Home Care



B2C: Bichsel

Home Care – specialist in out-patient therapies

- Improve **quality of life**, e.g. enhanced mobility, continuation in familiar setting
- **Individualised** therapies, e.g. infusions manufactured according to individual prescriptions
- **Efficient** provision of services compared with in-patient alternatives
- Patients from **toddlers to the elderly**, both **acute and chronic**
- **> 9,000 patients**



Backpack system for enteral nutrition

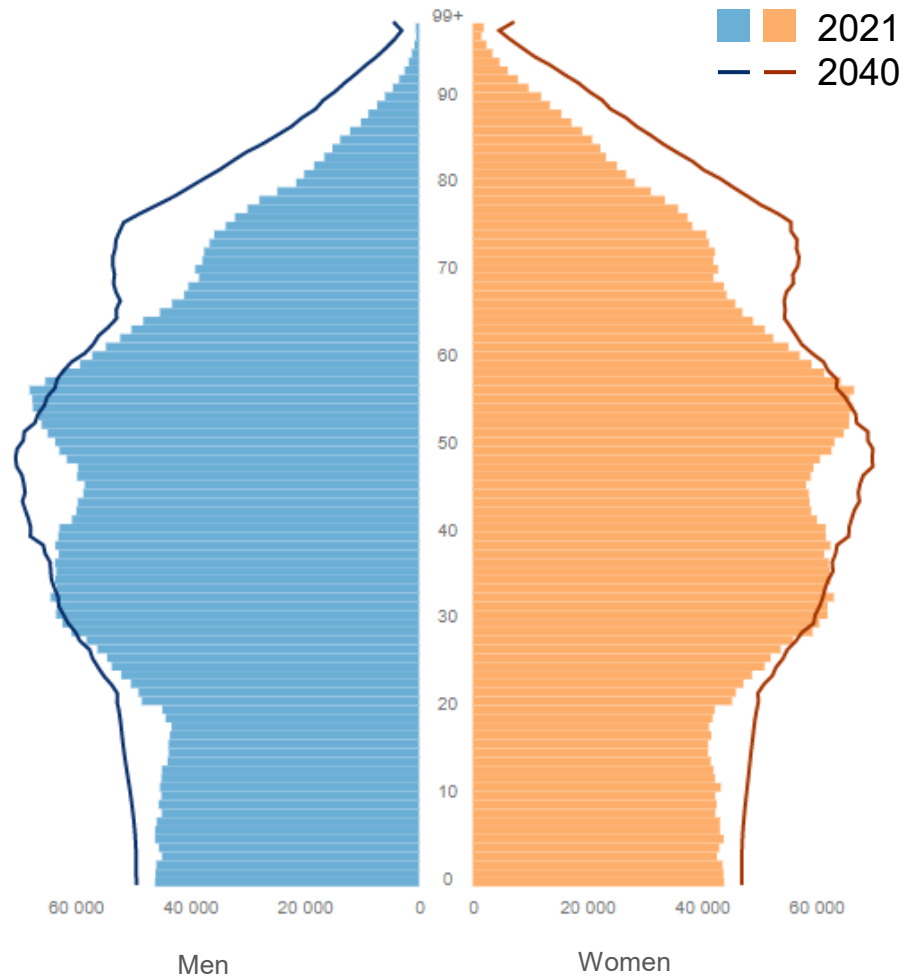
B2B4C: Care homes and Home Care organisations



B2B4C: Care homes and Home Care organisations

Positioning of Galenica in a growing market

Age pyramid of Switzerland, 2021 / 2040

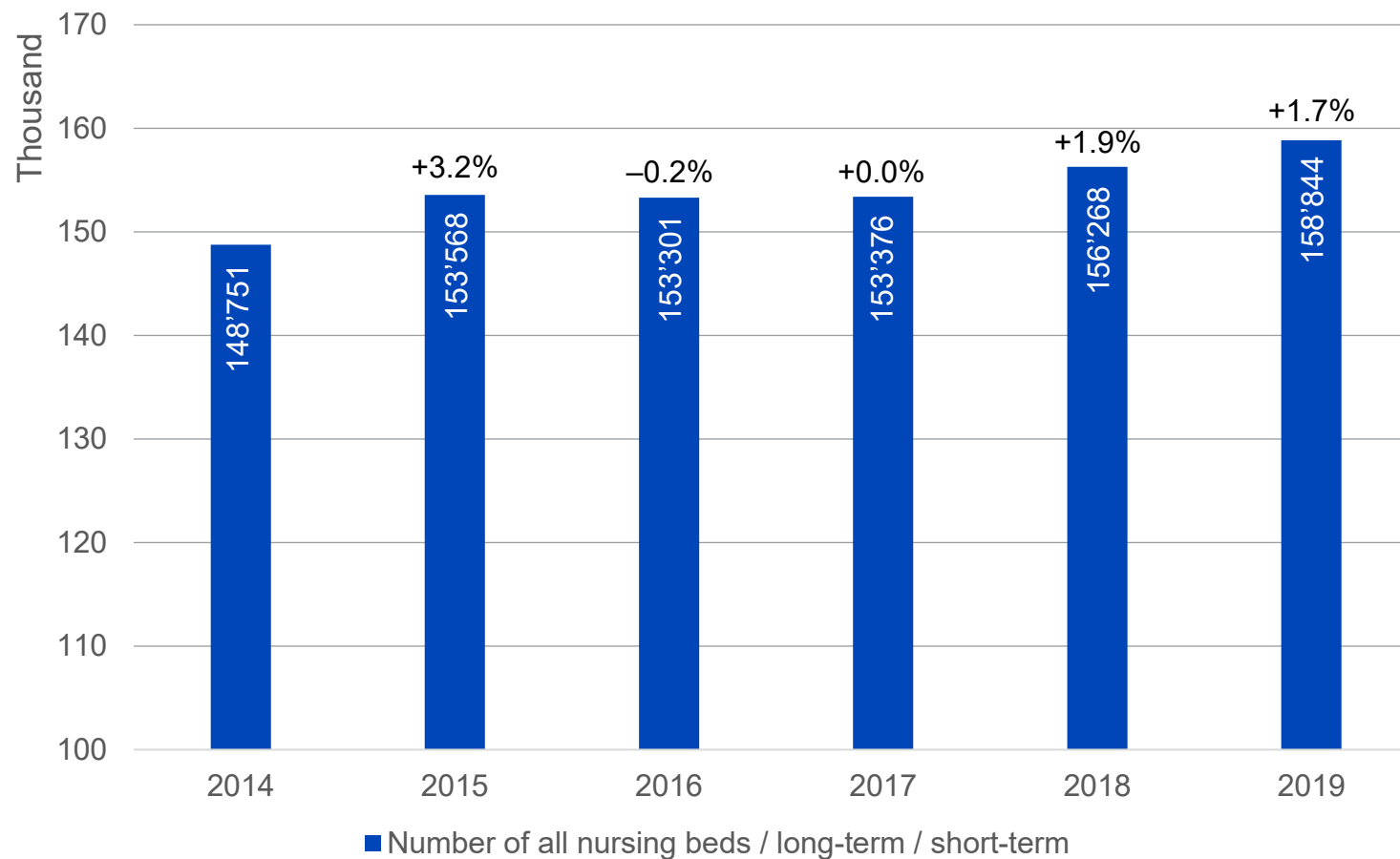


- **2021:**
~ 460,000 inhabitants over the age of 80
- **2040:**
> 1,000,000 inhabitants over the age of 80

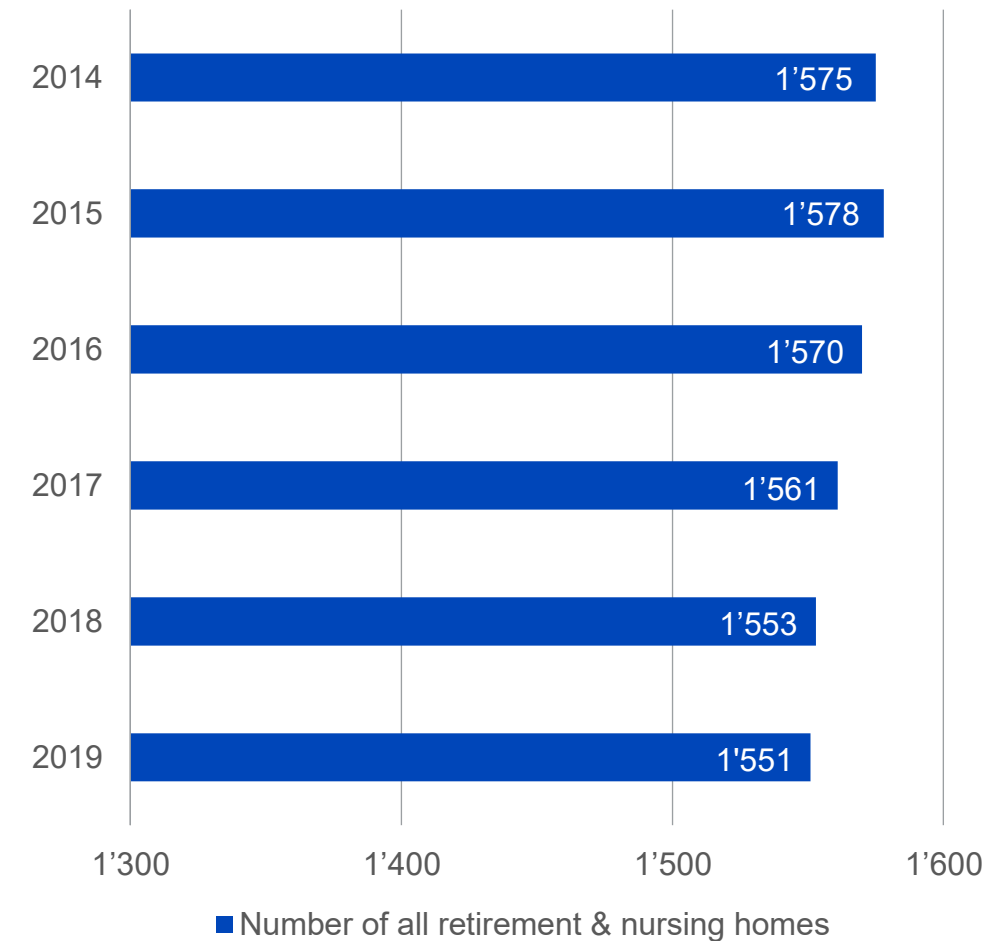
Source: bfs.admin.ch

B2B4C: Caring for Seniors: Slight increase of the number of places in retirement and nursing homes

Development of places in retirement & nursing homes
2014 – 2019



Number of homes 2014 – 2019

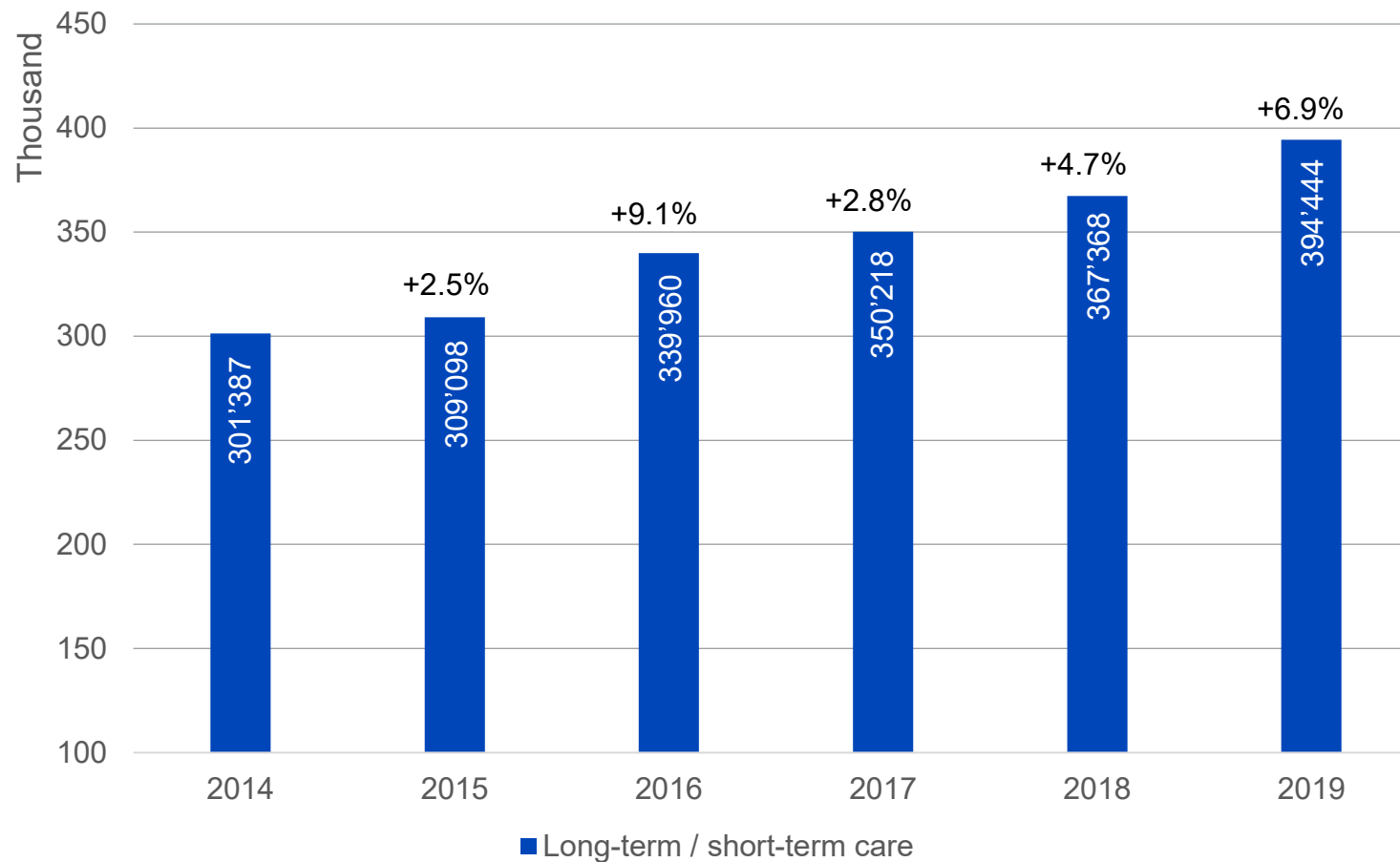


Source: Federal Statistical Office - Socio-medical institute statistics 2014-2019

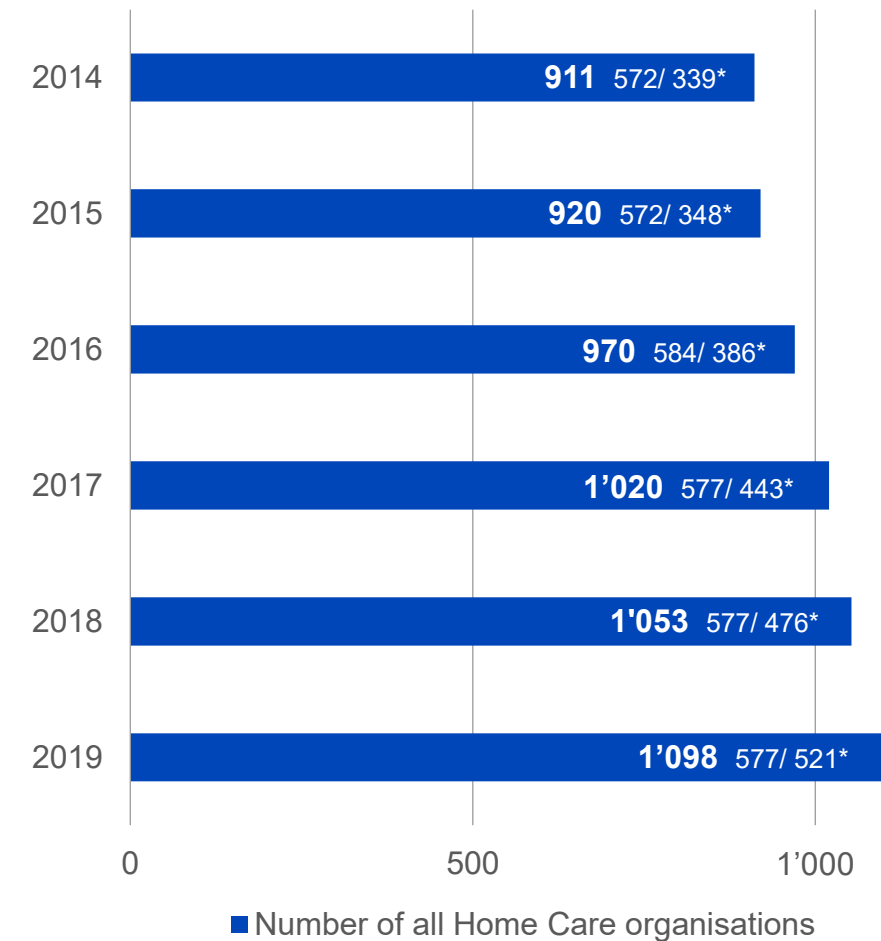
B2B4C: Caring for Seniors

Key figures Home Care

Development of Home Care customers
2014 – 2019



Home Care providers 2014 – 2019



Source: Federal Statistical Office - Socio-medical institute statistics 2014-2019

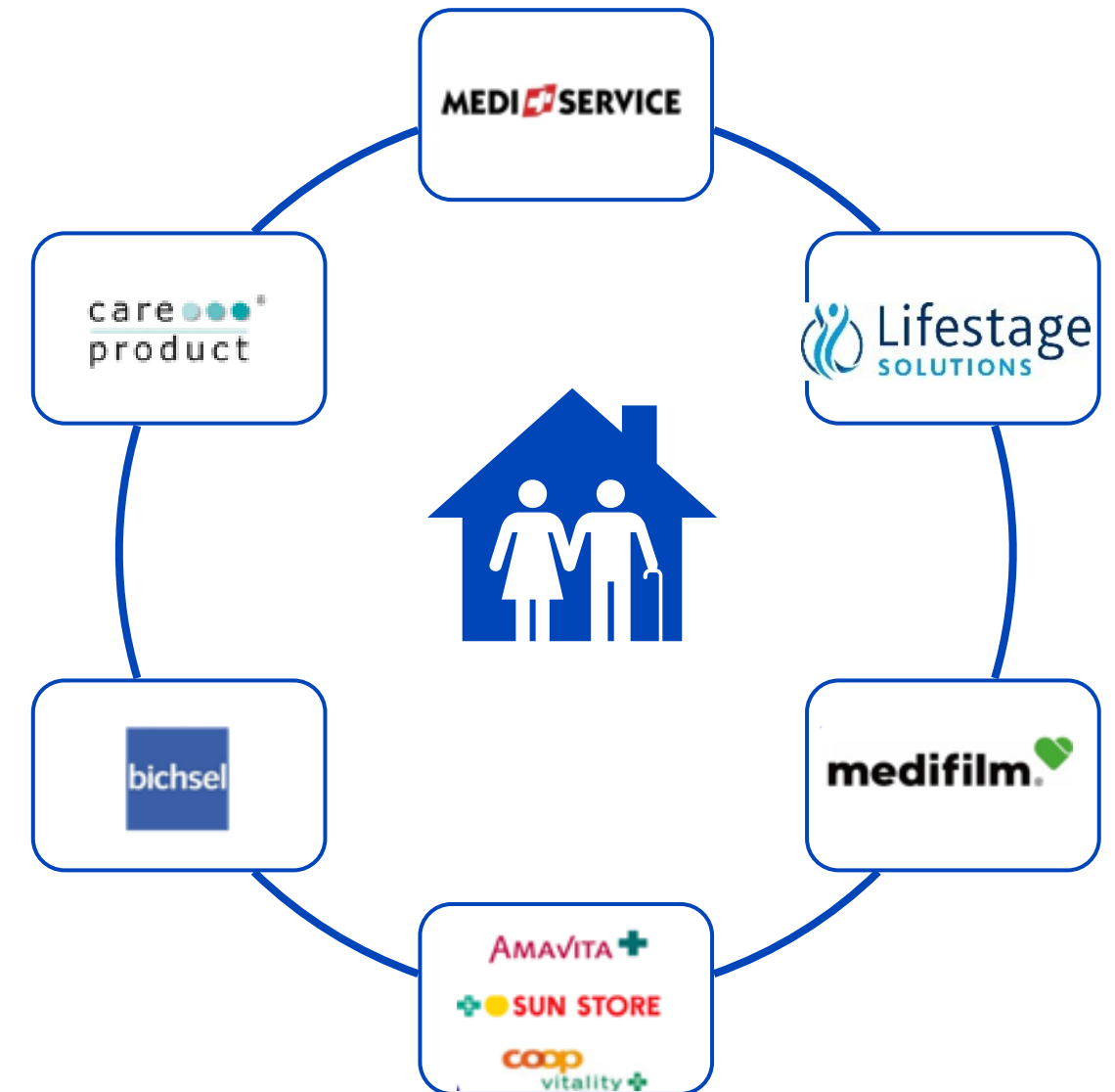
*Public / private sector institutions

B2B4C: Caring for Seniors

Galenica's answer

- Modular range of services for institutions from partly already existing services – pharmaceuticals, nutrition, rehabilitation
- Benefit from existing customer relationships from the Business Units
- Coordinated customer processing by Healthcare with all Business Units

Unique range of services with a high level of expertise



B2B4C: Lifestage solutions

New services for professionals

Supports nursing homes and home care organisations so they can concentrate on their core tasks!



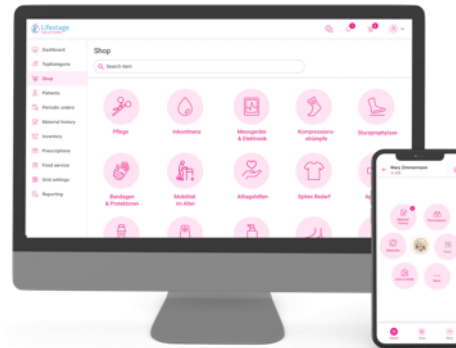
B2B4C: Lifestage solutions

Conventional products and services on one platform



- Mobile platform, integrated with common ERP systems
- Value-added Service to simplify the daily routine of care
- One-stop-shop for medical products

Value-add services



Medical consumables

Support for Home Care organisations and nursing homes



Thank you!



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