

Wholesale & Logistics

# A strong partner for physicians

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Investor Day, 14 October 2021, Interlaken

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

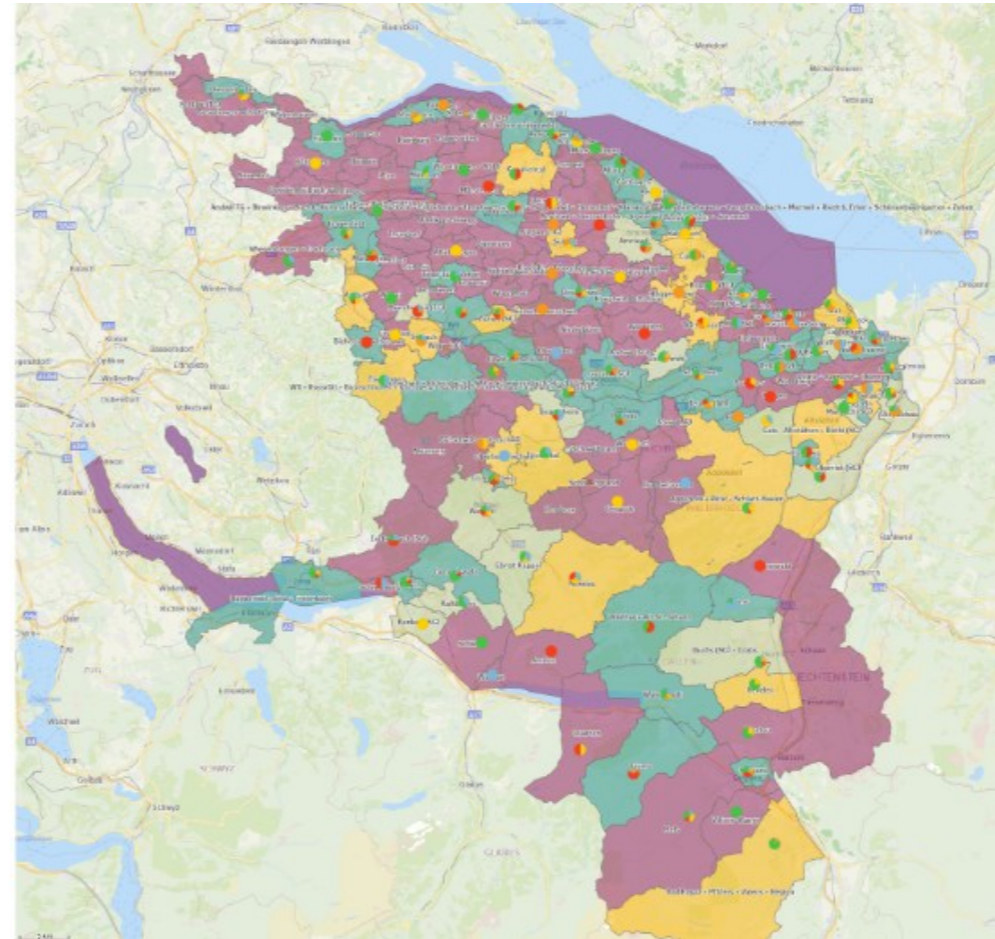
# The changing medical landscape in Switzerland

The average age of general practitioners increases:

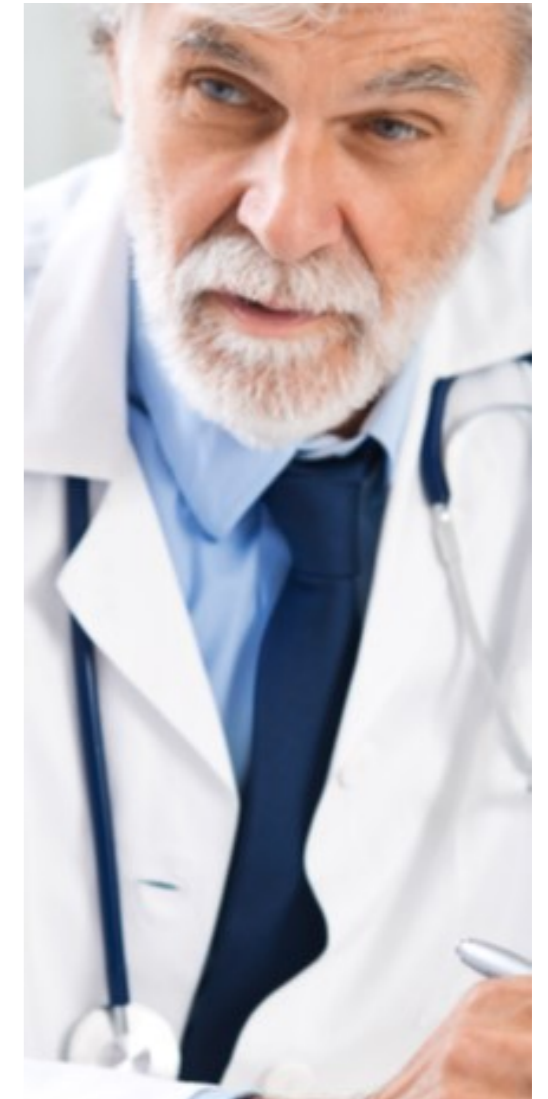
**The “family practice” is losing ground.**

Especially in rural regions:

**Already today, it is difficult to assure basic medical care.**



*The example Eastern Switzerland:  
Red = regions with insufficient basic medical care  
Yellow = regions on the threshold of insufficient basic medical care*



# Galenica in the medical practice market: The elements of our strategy



## Self-dispensing doctors and specialists

Strong position due to longstanding market  
performance and high quality



## Strategic focus on medical centres

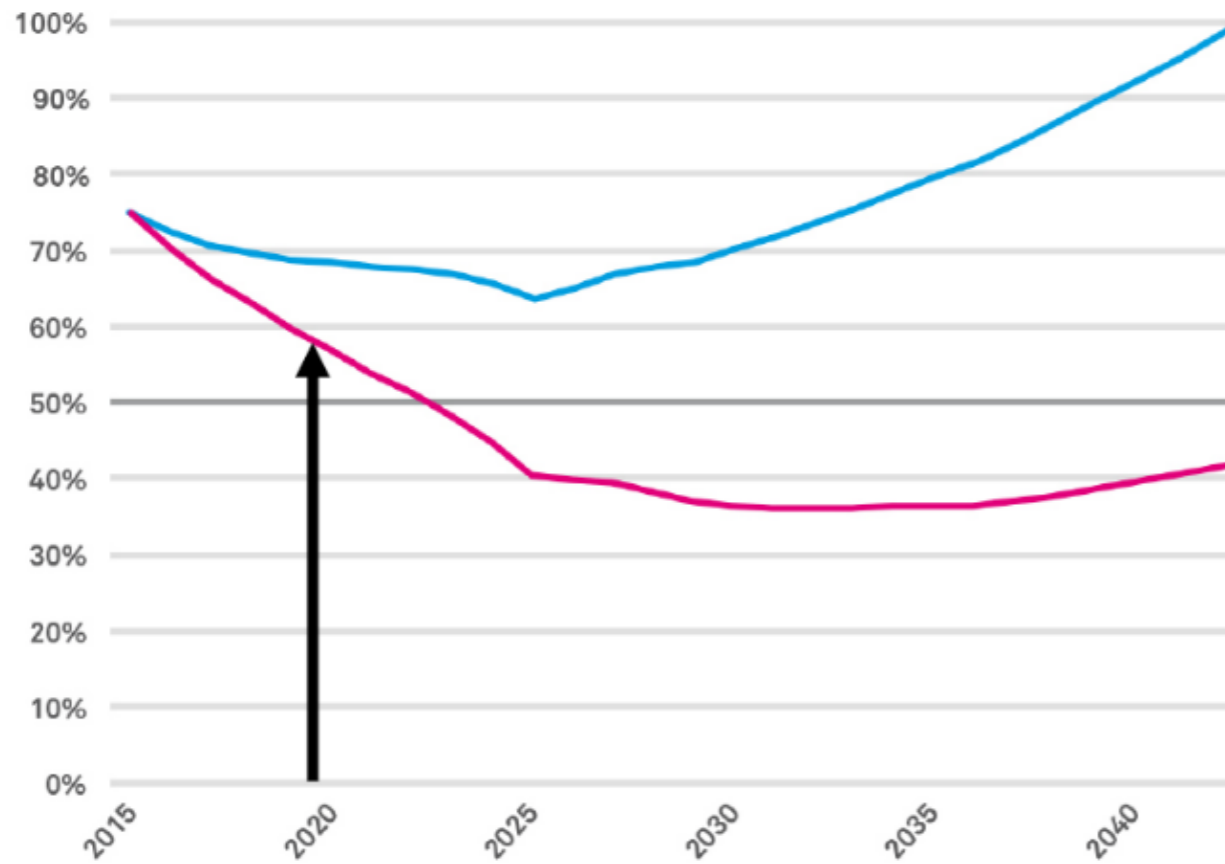
Support with start up, operation and  
expansion



## Medical technology and laboratory equipment

Everything from a single source – available at short notice, attractive product range

# Medical centres will increase the attractiveness of the general practitioner profession



## 100% of basic healthcare needs

Optimistic scenario: 50% of medical students become GPs – this would secure basic healthcare by the year 2040

## 50% of basic healthcare needs

Realistic scenario: 25% of medical students become GPs as it is the case so far – this covers only half of basic healthcare needs by the year 2025



Sources: Institute of Family Medicine of Basel, Polipraxis St. Gallen

# Our services for medical centres



Personal advice along the medical centre's entire value-added chain



# A doctor's point of view

Video  
Dr. Palma



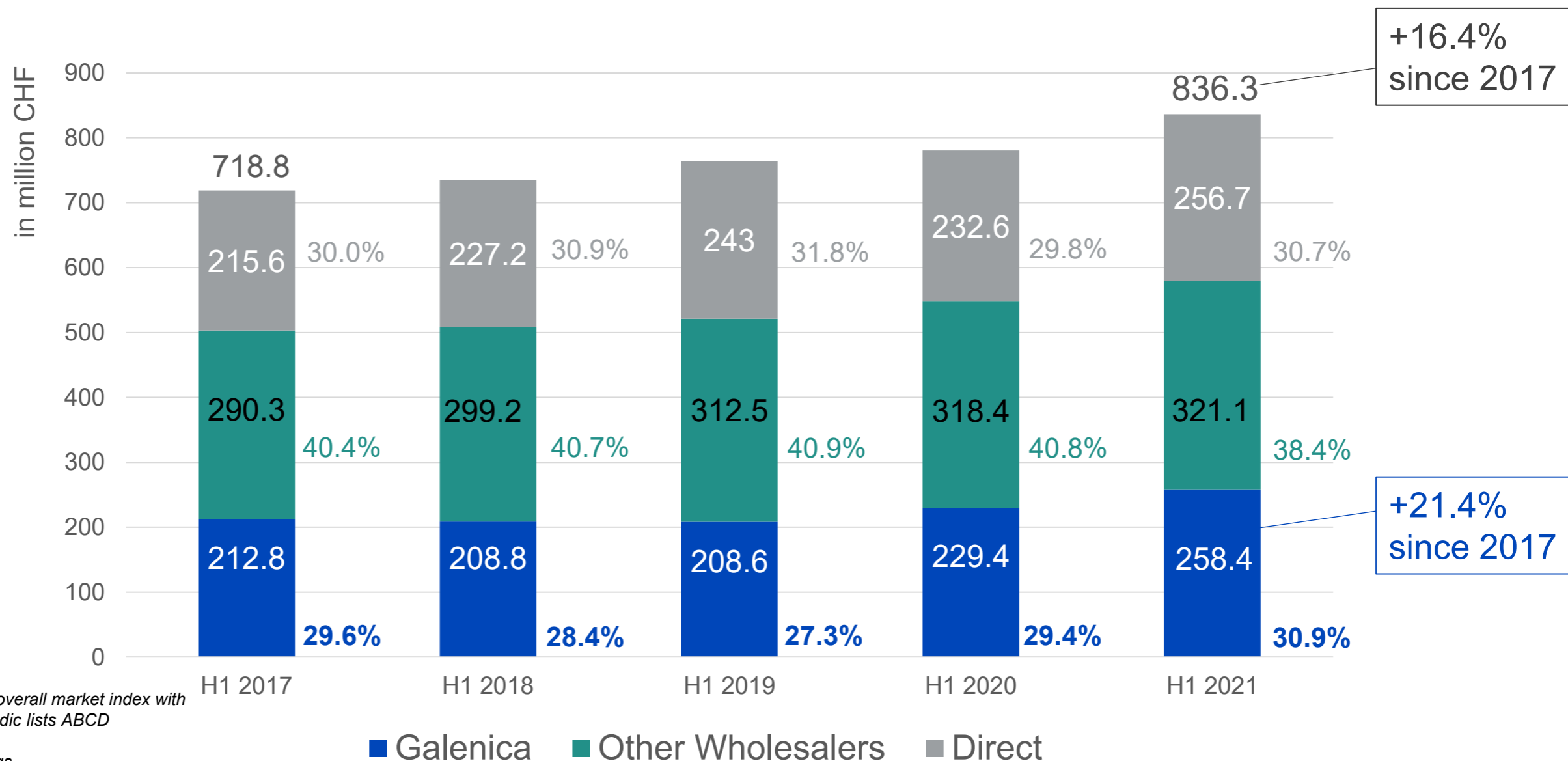
“In Galexis, we have a strong partner that supplies us in the pharmaceutical and non-pharmaceutical sectors. We don't need to access different suppliers.

We can contact the partners who support us directly on a day-to-day basis, either by e-mail or telephone.

This makes the processes very efficient.”

Dr. med. Adrian Palma, docstation, Zurich

# Growing share of deliveries to doctors in a growth market



As of June 2021

Source: IQVIA iQPharma overall market index with restriction on the Swissmedic lists ABCD

Data may include roundings

# Projects Modulo & Avance



# Wholesale & Logistics modernisation projects in a nutshell

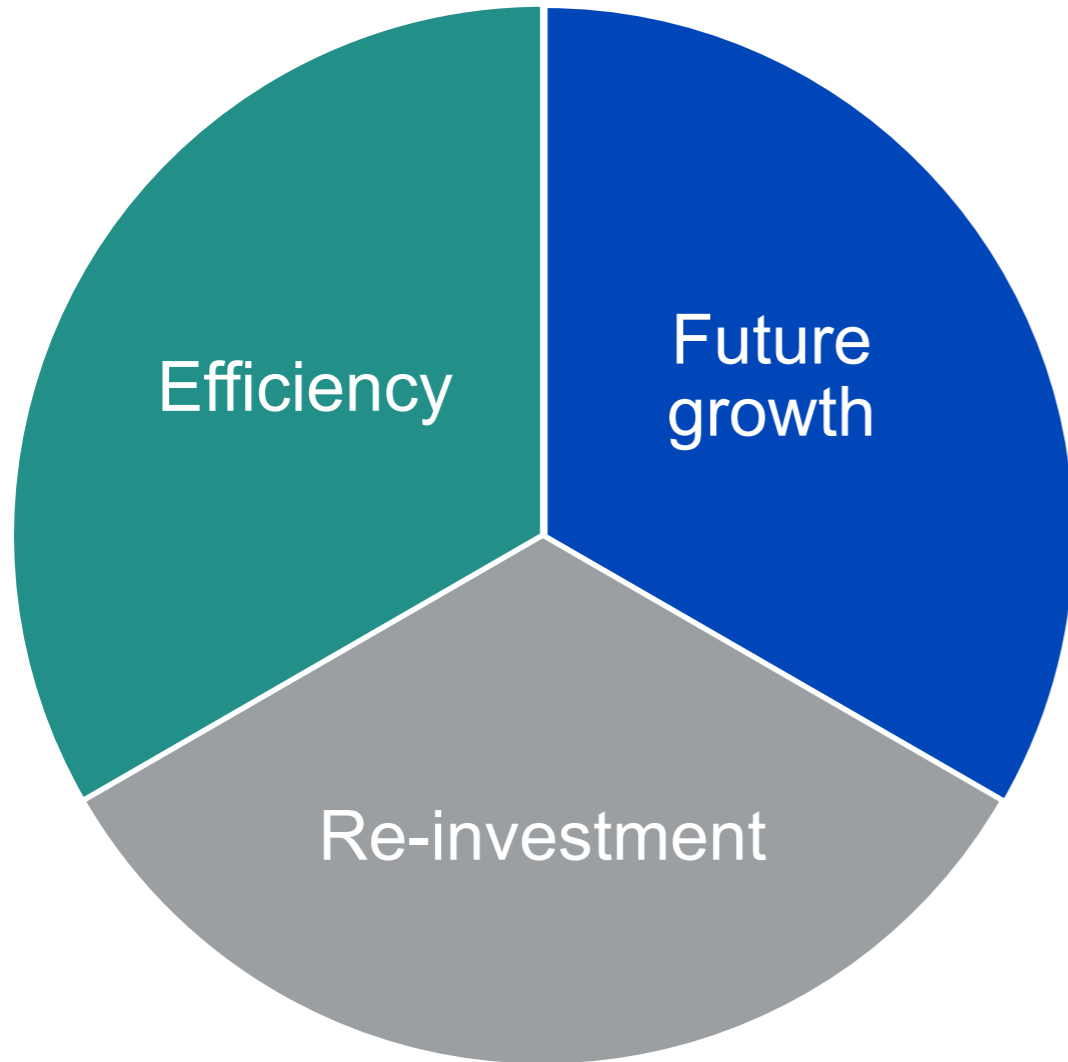


- **Objective: Renewal of ERP and WM Systems**
- Started in 2016
- Estimated CAPEX CHF 71.6 million
- Business Units: Alloga and Galexis
- Full financial benefit from 2025 onwards



- **Objective: Modernisation of Distribution Centre in Ecublens**
- Started in 2017
- Estimated CAPEX CHF 33.5 million
- Business Unit: Galexis
- Full financial benefit from 2023 onwards

# Three reasons for investing in our infrastructure



# Modulo & Avance: Key achievements and next milestones

## Modulo

Continuous go-lives at Alloga

1/3 of Alloga's business on SAP

System configuration Galexis

Go-live of Galexis Ecublens

Go-live of Galexis Niederbipp



Building concept approved

First parts of facility rebuilt

Building completed by end of year

Go-live of conveyor

2019

2020

2021

2022

2023

2024

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