
Our potential in the Swiss Consumer Healthcare market

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Media and Analyst Conference, 12 March 2019

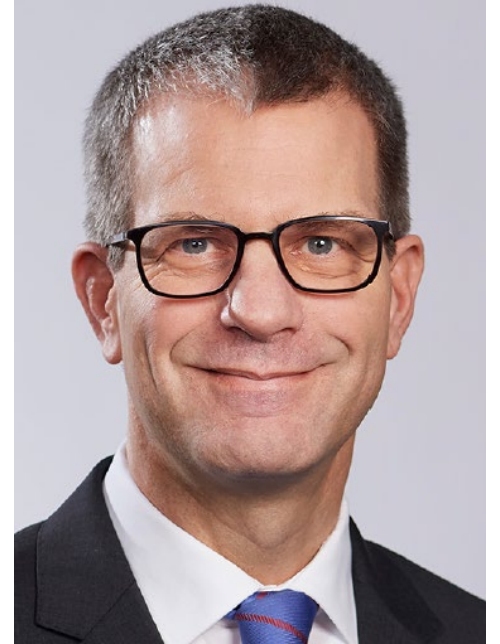
Thomas Szuran, Dr. sc. nat., biochemist and behavioural biologist

1997 – 2007

- Abbott Laboratories and Pfizer Inc.
- Sectors Rx, OTC and nutrition
- Switzerland and international

2008 – 2018

- CEO of Biomed AG
- President of the Association of the Swiss Self-Medication Industry (ASSGP)



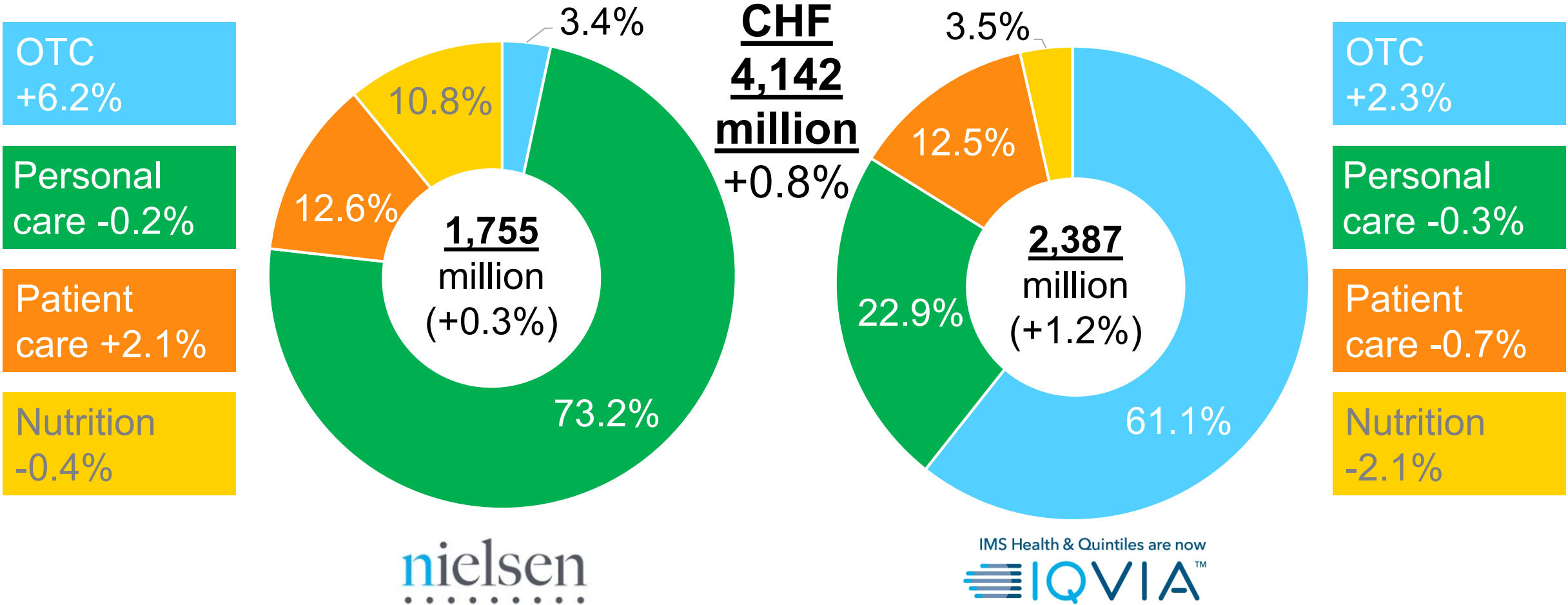
Since January 2019

- Head Products & Brands Business sector
Member of the Corporate Executive Committee of the Galenica Group

Consumer Healthcare market in the specialist and retail trade

Retail trade

Specialist trade



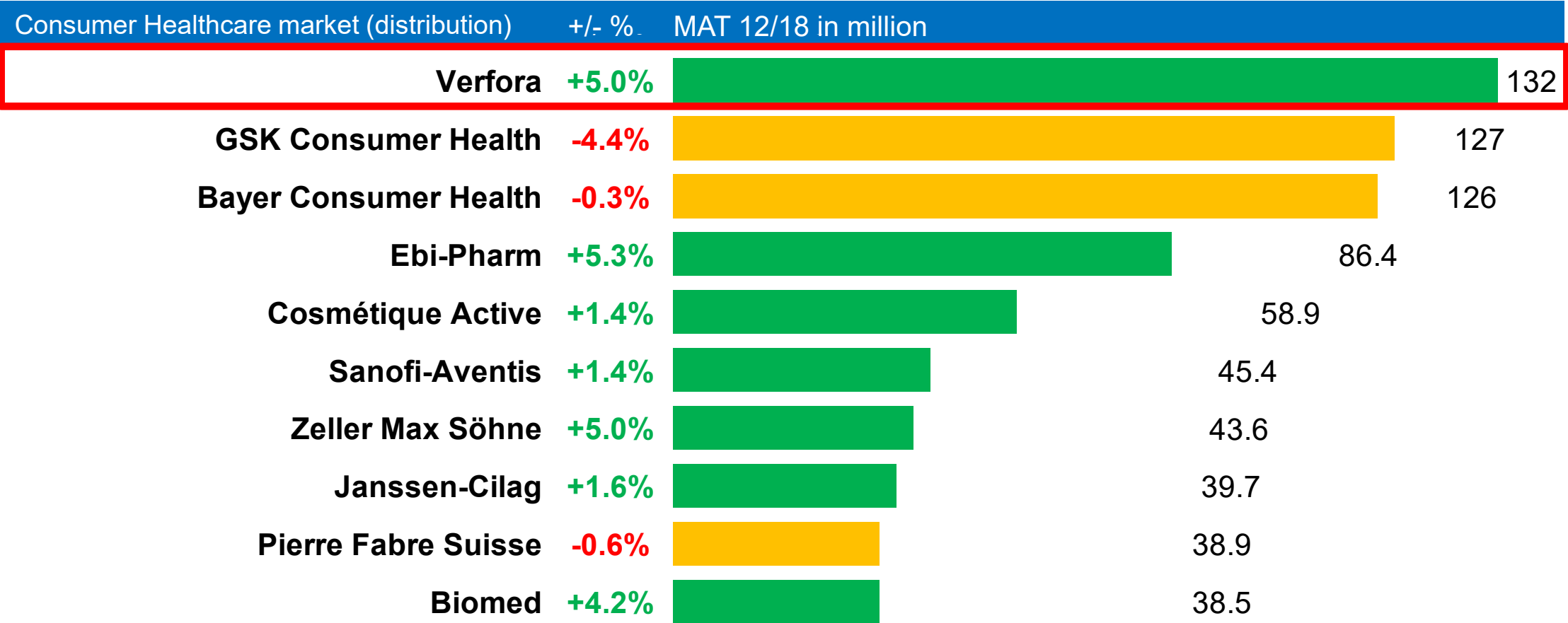
The Consumer Healthcare market in the specialist trade is stable

Consumer Healthcare market segments:
 +/- (in %) in Streetprice (SP) value compared to previous year

Sale SP value	2014	2015	2016	2017	2018	Streetprice value in CHF	
TOTAL	-0.3	-0.4	-1.1	-1.5	+1.2	Total <u>CHC</u> :	2,387 million
OTC	-0.2	+1.5	+1.0	-0.5	+2.3	<u>O</u>ver <u>T</u>he <u>C</u>ounter:	1,458 million
PEC	-2.5	-4.6	-6.1	-4.0	-0.3	<u>P</u>ersonal <u>c</u>are:	547 million
PAC	+2.6	+0.2	+0.2	-0.7	-0.7	<u>P</u>atient <u>c</u>are:	298 million
NUT	+5.7	-0.7	-3.3	-4.8	-2.1	<u>N</u>utrition:	84 million

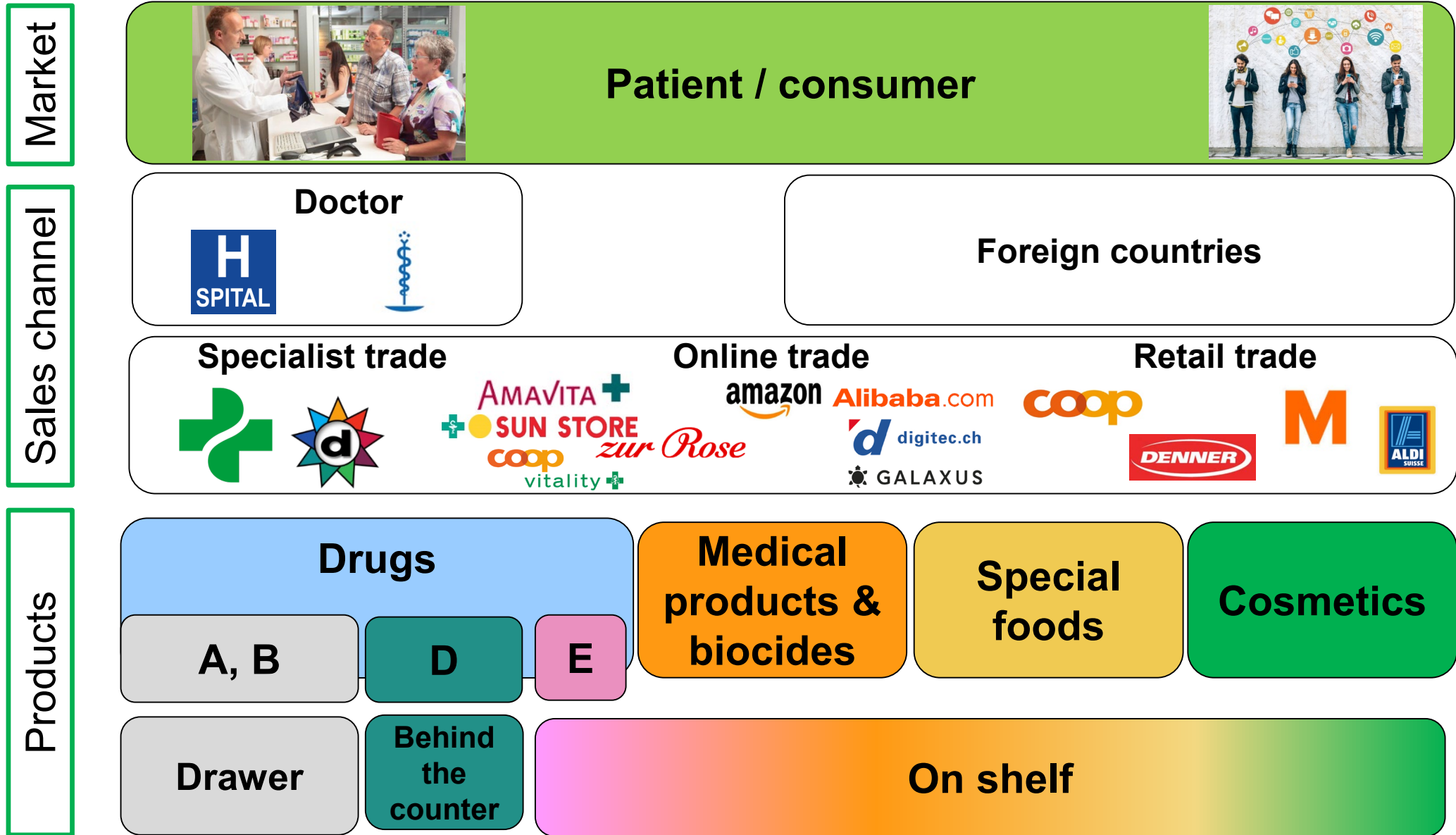
Source: IQVIA Pharmatrend 2018

Verfora as most important partner for specialist trade in a fragmented market

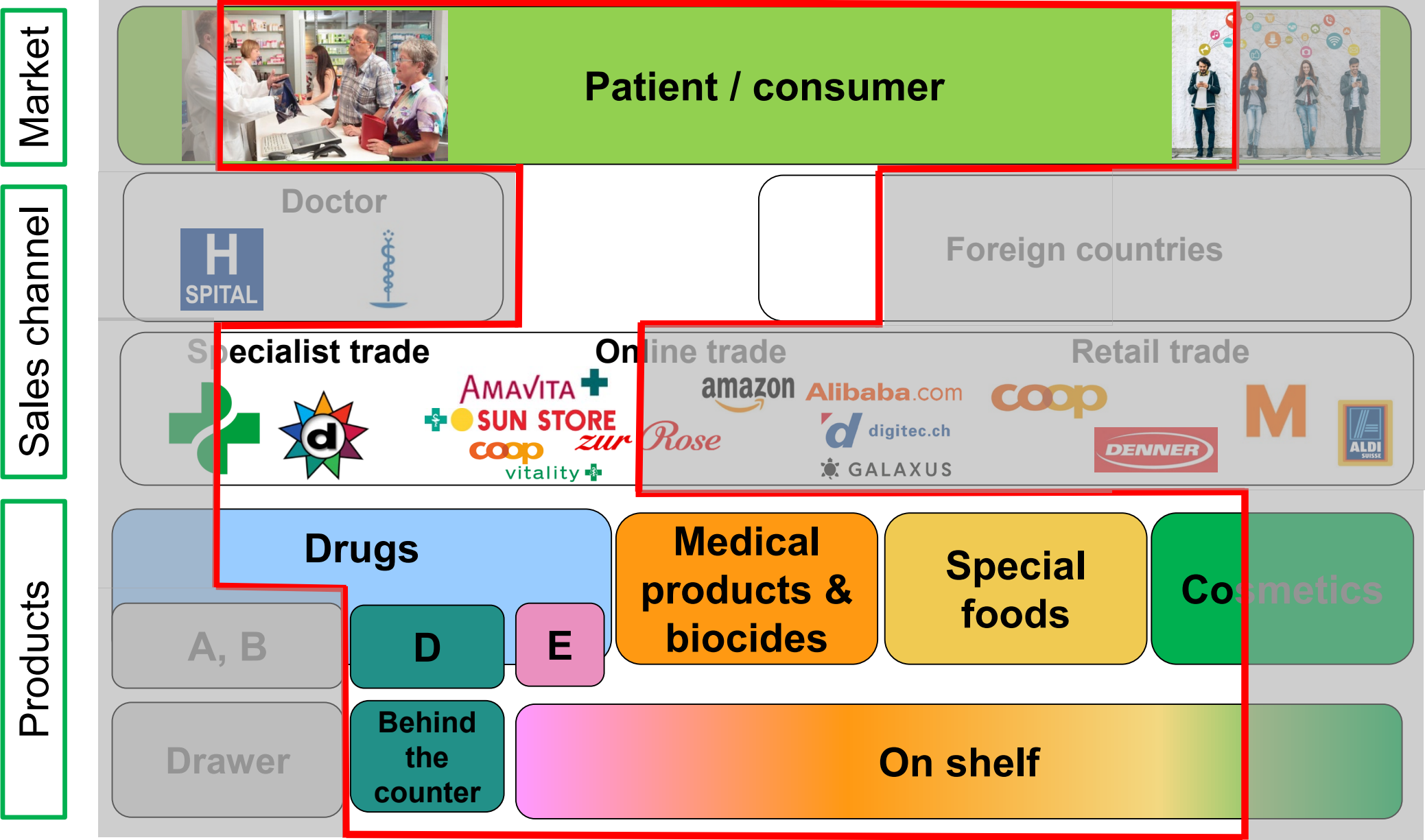


The top 3 companies each have a market share of just 5-6%

Market – Sales channel – Products



Market – Sales channel – Products



Our growth potential

Market

- New customer segments
 - Digital natives
 - Men

Sales channel

- Expansion of digital services
 - Customer journey
 - Omni-Channel

Products

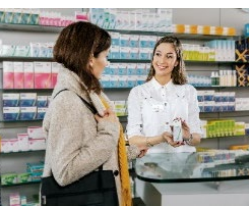
- Development of portfolio
 - Merger & acquisition and licence agreements
 - Expanding existing brands
 - Tapping new therapeutic areas

The bridge between consumer and specialist trade



Verfora brands

Partner brands



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