

Financial Analysts Consensus 2023 - 2025 Galenica Group

11.01.2024

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	7	3'759.4	4.8%	3'771.8	3'767.1	3'713.2
Products & Care	2'029.6	445.9	1'583.7	6	1'668.5	5.4%	1'692.3	1'662.1	1'645.5
Logistics and IT	2'933.3	-	2'933.3	6	3'075.9	4.9%	3'094.1	3'076.0	3'051.8
Corporate & Elimination	-948.6	-20.0	-928.6	6	-987.1	6.3%	-947.4	-982.3	-1'038.0
EBIT adjusted ¹⁾	200.8	10.2	190.6	7	195.7	2.7%	202.3	194.8	190.9
ROS	5.0%		5.3%		5.2%		5.4%	5.2%	5.1%
Products & Care	153.5	10.2	143.3	6	152.0	6.0%	156.0	151.5	149.7
ROS	7.6%		9.0%		9.1%		9.2%	9.1%	9.1%
Logistics and IT	49.2	-	49.2	6	44.7	-9.2%	46.9	44.9	41.4
ROS	1.7%		1.7%		1.5%		1.5%	1.5%	1.4%
Corporate & Elimination	-1.9	-	-1.9	6	-1.8	-7.8%	0.1	-2.1	-3.1
Net profit adjusted ¹⁾	165.7	8.5	157.2	7	159.3	1.3%	167.2	156.9	154.6
Investments in tangible and intangible assets <i>in % of net sales</i>	70.7 1.8%	0.5	70.2 2.0%	6	67.8 1.8%	-3.3%	70.0 1.9%	70.0 1.9%	60.3 1.6%
Dividend per share (in CHF, paid in the following year)	2.20		2.20	6	2.24	1.6%	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	3'759.4	7	3'911.5	4.0%	3'952.0	3'915.1	3'859.1
Products & Care	1'668.5	6	1'746.4	4.7%	1'796.0	1'731.7	1'723.1
Logistics and IT	3'075.9	6	3'186.5	3.6%	3'210.9	3'184.1	3'154.3
Corporate & Elimination	-987.1	6	-1'016.8	3.0%	-966.3	-1'013.6	-1'078.0
EBIT adjusted ¹⁾	195.7	7	211.5	8.1%	224.8	210.0	204.3
ROS	5.2%		5.4%		5.7%	5.4%	5.3%
Products & Care	152.0	6	161.1	6.0%	170.0	160.2	157.3
ROS	9.1%		9.2%		9.5%	9.3%	9.1%
Logistics and IT	44.7	6	52.0	16.4%	57.7	53.5	43.3
ROS	1.5%		1.6%		1.8%	1.7%	1.4%
Corporate & Elimination	-1.8	6	-1.4	-21.4%	-	-1.6	-2.4
Net profit adjusted ¹⁾	159.3	7	171.6	7.7%	181.0	170.9	163.6
Investments in tangible and intangible assets <i>in % of net sales</i>	67.8 1.8%	6	68.5 1.7%	0.9%	70.0 1.8%	69.8 1.8%	63.2 1.6%
Dividend per share (in CHF, paid in the following year)	2.24	6	2.32	3.9%	2.45	2.30	2.20

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	3'911.5	7	4'063.6	3.9%	4'133.0	4'071.4	3'999.9
Products & Care	1'746.4	6	1'826.1	4.6%	1'894.0	1'813.4	1'784.8
Logistics and IT	3'186.5	6	3'299.9	3.6%	3'339.3	3'299.0	3'250.7
Corporate & Elimination	-1'016.8	6	-1'051.7	3.4%	-985.6	-1'051.3	-1'119.6
EBIT adjusted ¹⁾	211.5	7	223.3	5.6%	243.1	221.2	214.7
ROS	5.4%		5.5%		5.9%	5.4%	5.4%
Products & Care	161.1	6	170.2	5.6%	182.0	168.2	165.3
ROS	9.2%		9.3%		9.6%	9.3%	9.3%
Logistics and IT	52.0	6	55.4	6.5%	61.0	56.2	46.6
ROS	1.6%		1.7%		1.8%	1.7%	1.4%
Corporate & Elimination	-1.4	6	-1.9	39.8%	0.1	-1.8	-5.5
Net profit adjusted ¹⁾	171.6	7	182.0	6.1%	198.0	182.0	172.4
Investments in tangible and intangible assets	68.5	6	69.3	1.2%	72.2	70.0	66.0
<i>in % of net sales</i>	<i>1.7%</i>		<i>1.7%</i>		<i>1.7%</i>	<i>1.7%</i>	<i>1.6%</i>
Dividend per share (in CHF, paid in the following year)	2.32	6	2.43	4.4%	2.61	2.40	2.20

1) Excluding the effects of IAS 19 and IFRS 16