

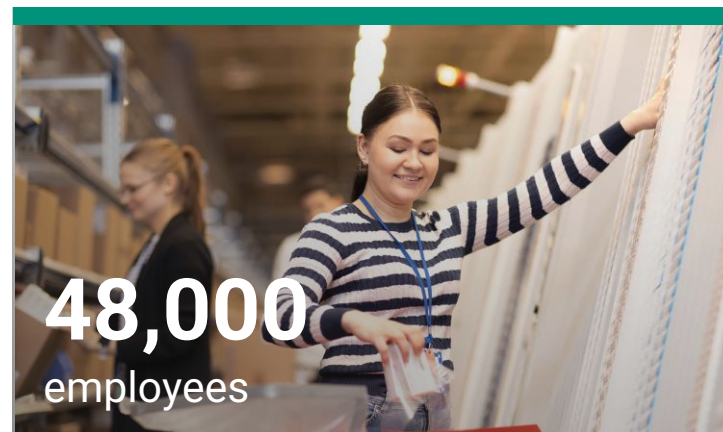
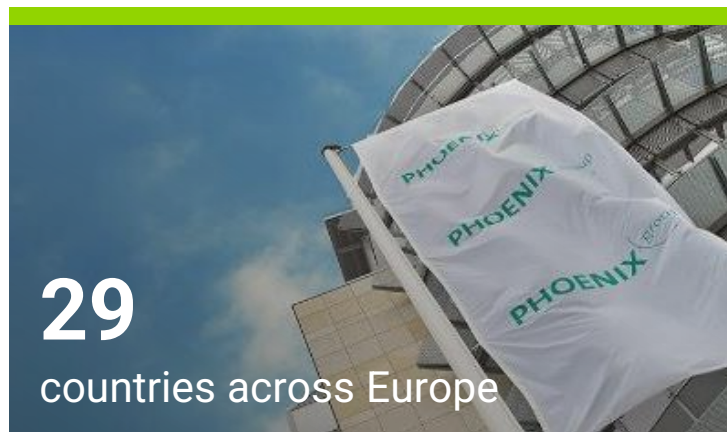


PHOENIX group

DISRUPTING THE OTC AND CONSUMER HEALTH INDUSTRY

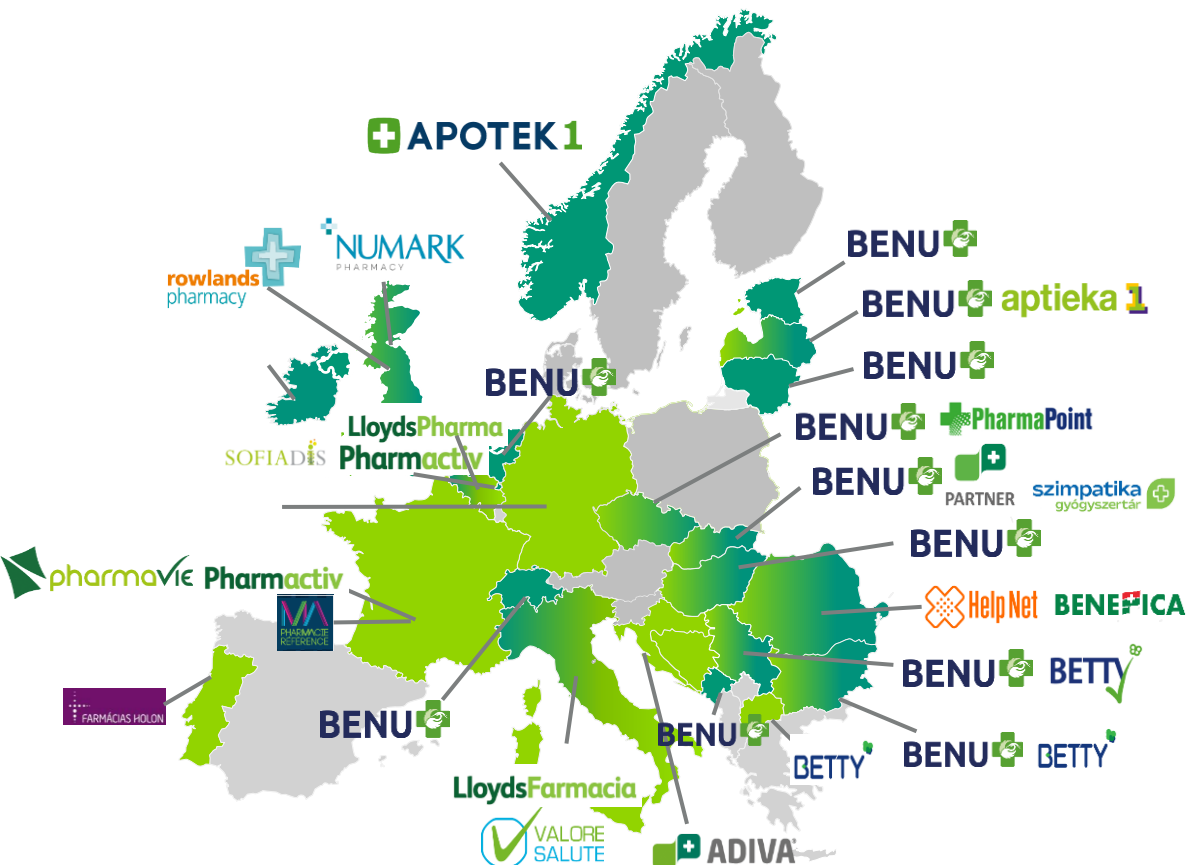
THE FUTURE OF A CUSTOMER
CENTRIC SOLUTION

PHOENIX GROUP – WHO ARE WE?



MAXIMISING OUR IMPACT ACROSS EUROPE

Leveraging our footprint for greater success



3.200 own and franchise pharmacies

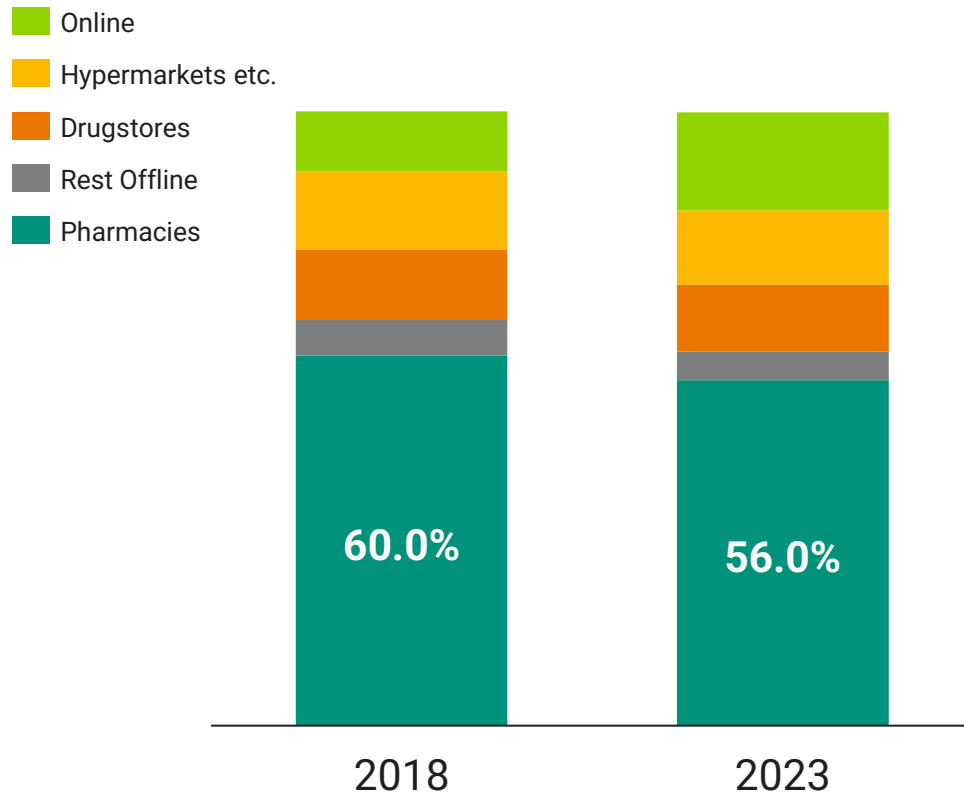
17.000 cooperation pharmacies across Europe



Focus on OTC and CHC Growth and Promotion with European Strategic Partners

FOCUSING ON PHARMACY GROWTH

Pharmacies face a channel shift, losing 4 points of market share to online



Shopper trends & behavior



E-Commerce

- Home delivery
- Competitive
- Wide range of assortment

Hypermarkets

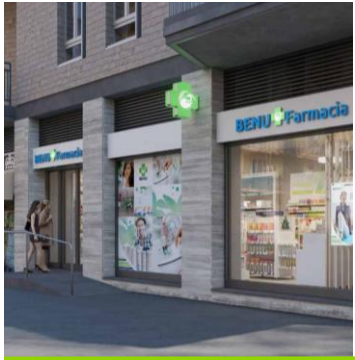
- Wide distribution
- One stop Shop

Drugstores

- Wide Range
- Trends and Innovators
- Strong P.L proposition

COORDINATED APPROACH TO CATEGORY MANAGEMENT

Assortment according to Pharmacy Placement to maximise consumer impact



HIGH STREET



HEALTH CENTRE



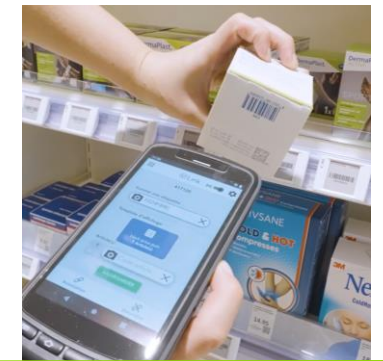
COMMUNITY



SHOPPING CENTRE



SUPERMARKET



E-COMMERCE

Optimised Pharmacy Layout
European Strategic Partnerships to drive Growth



PHOENIX^{group}

WE DELIVER HEALTH

PHOENIX Group