Botanicals

Market Scenario

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7,500+
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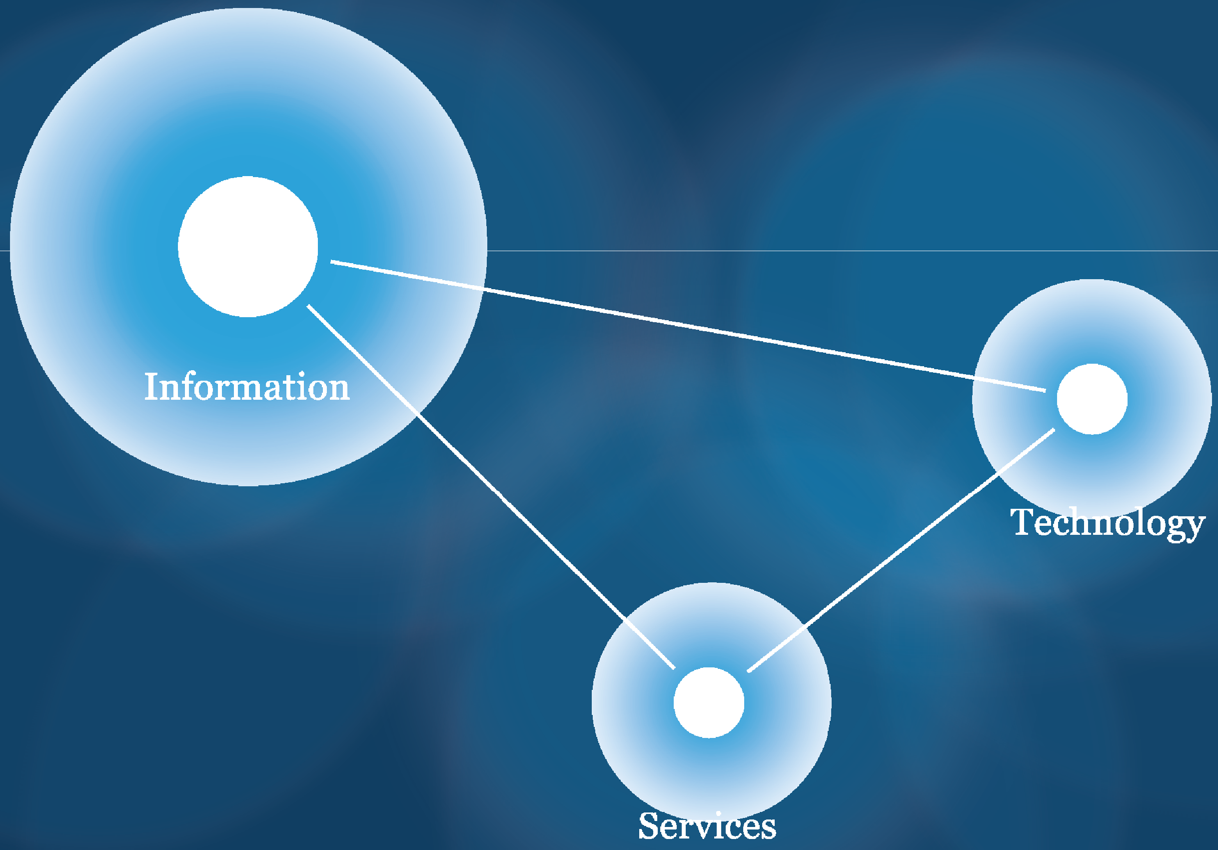
- Dedicated focus on Life Sciences, Payers, and Providers
- Global footprint and scale: Serve over 5,000 customers on 6 continents
- Connectivity to all healthcare stakeholders

IMS Health's transformation



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Channels & segments

Healthcare shops audited by IMS Health & Products segments

Pharmacies

Parapharmacies

Corners

Rx Drugs

OTC

Personal Care

Patient Care

Nutrition

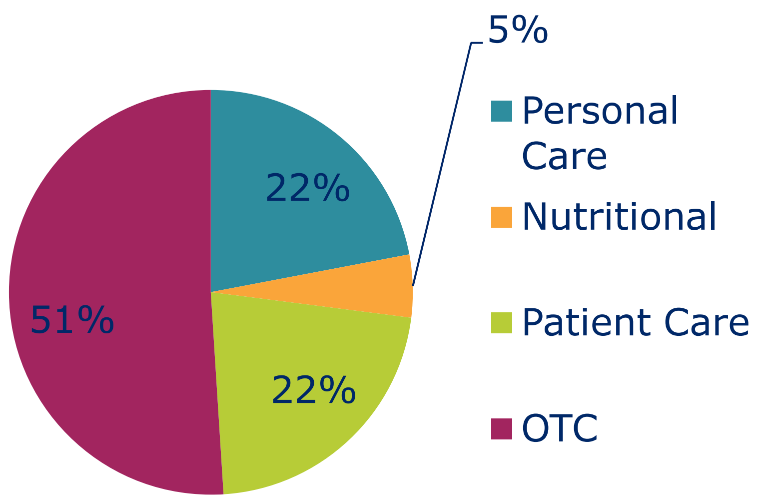
Including Food Supplements, Botanicals etc.

All data presented are sell out information – Sales at public price

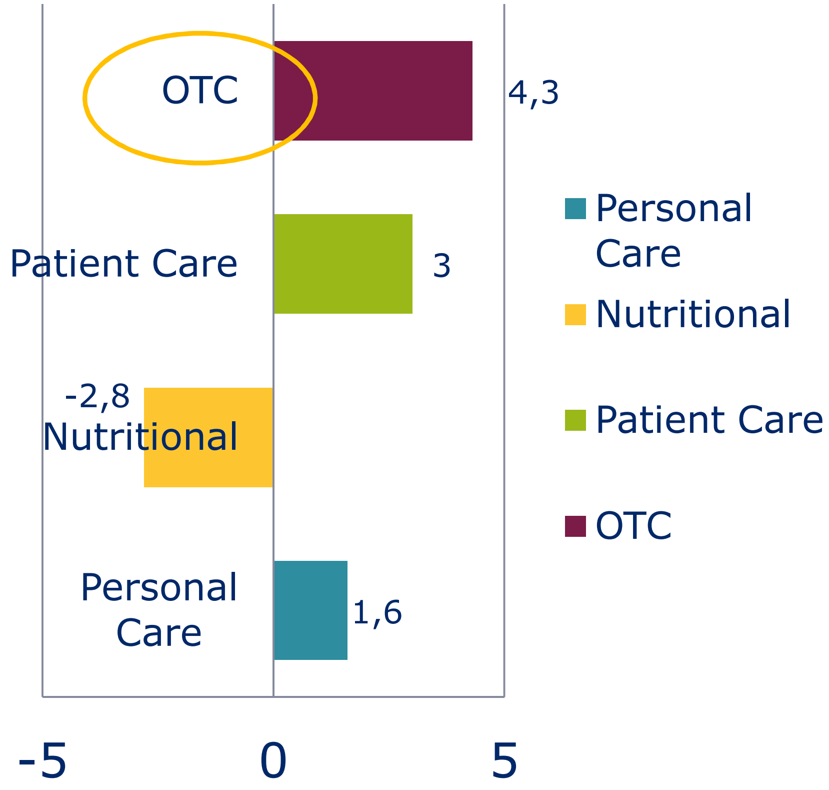
Non Rx market by segment

All channels 2014

Sell Out € 10.984 Ml



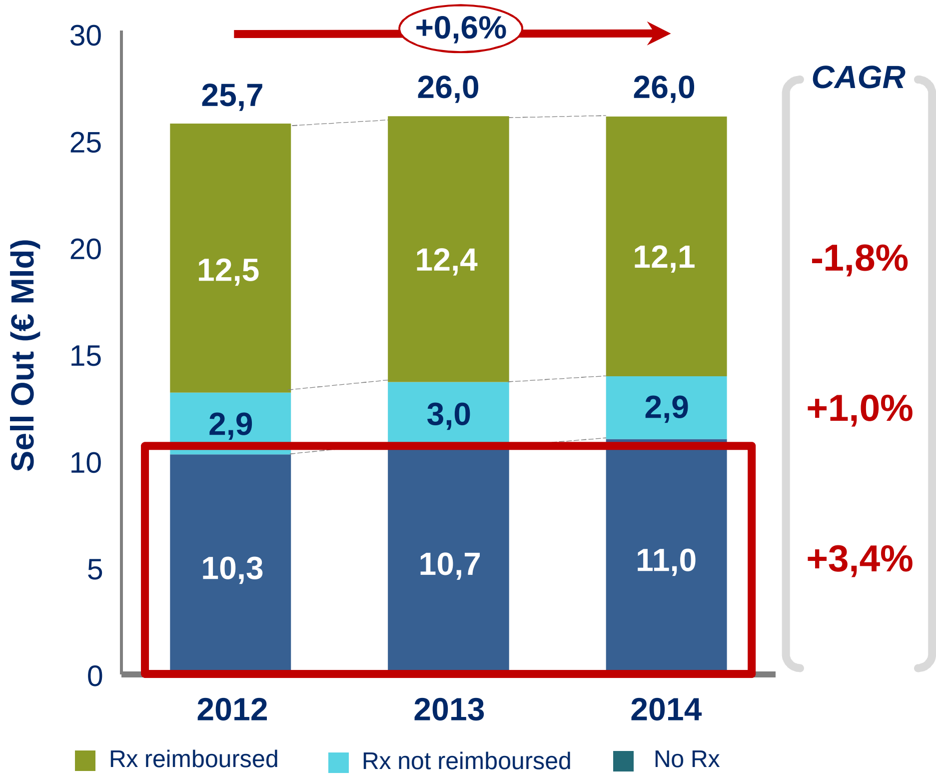
Sell Out Growth vs 2013

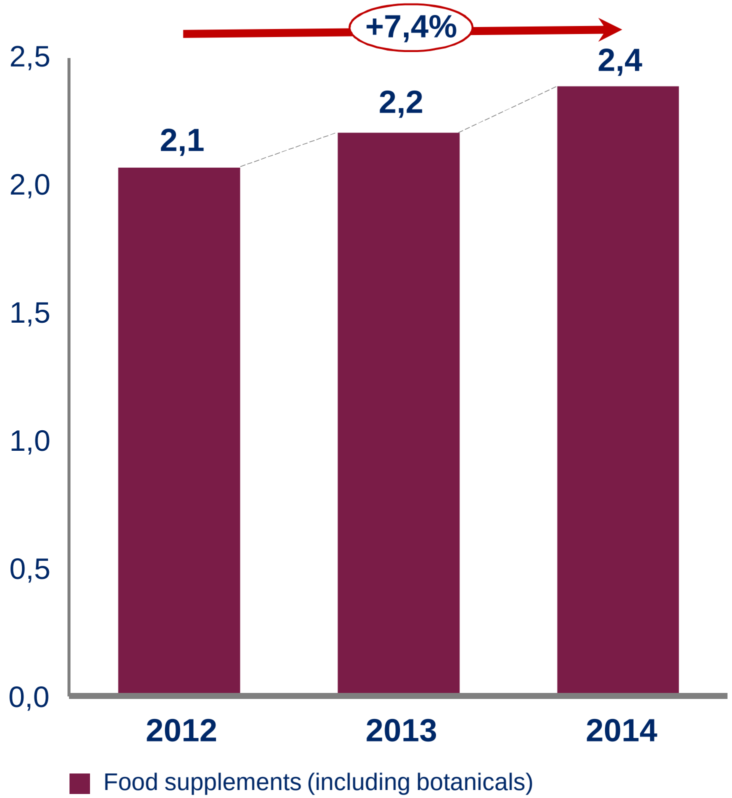


Source: IMS Health Multichannel

Non Rxs are growing

Food supplements have an even faster pace





Source: IMS Health Multichannel

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Botanicals Market

Botanicals

No standard and exhaustive definition in place to measure the market

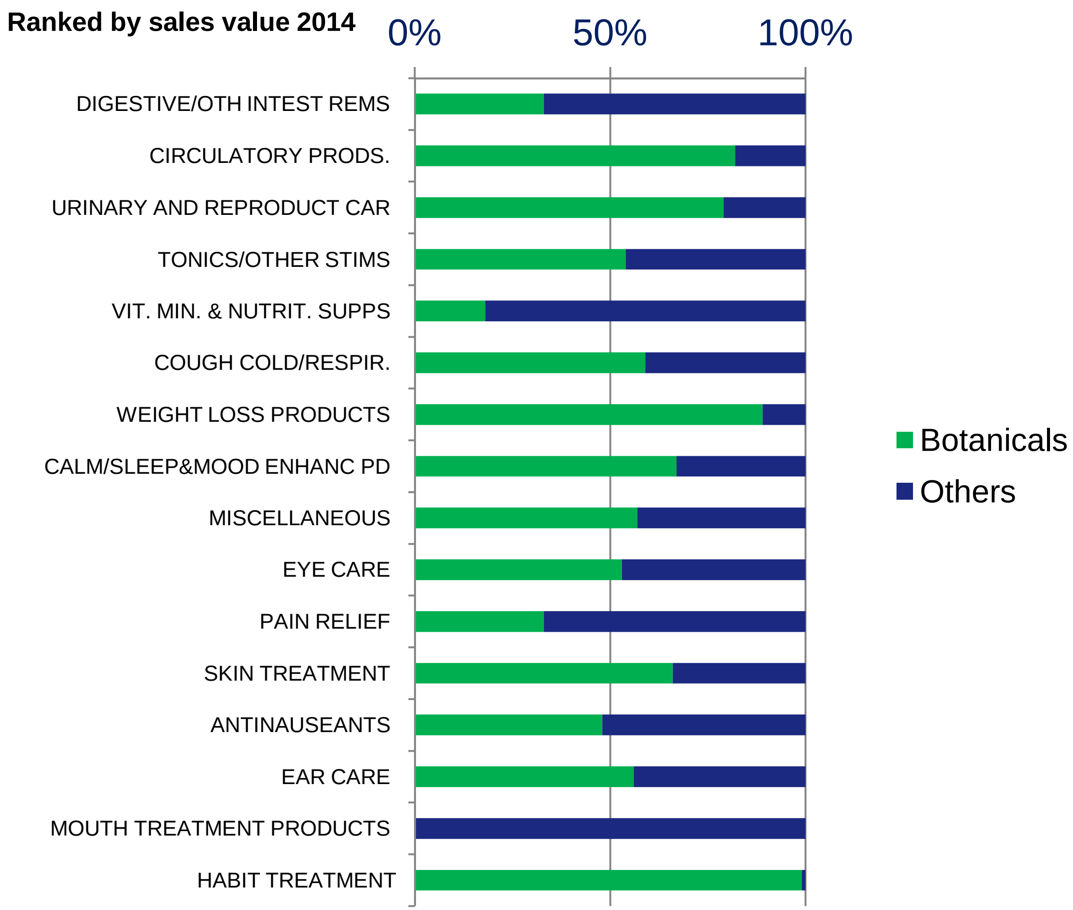
Un-licenced brands containing at least one vegetal active principle

Oral forms only

OTC (therapeutical products excluding cosmetics and nutritional)

Botanicals vs the whole nutraceutical marlet

Therapeutic segments by active priciple (herbal vs non herbal) – Sales %



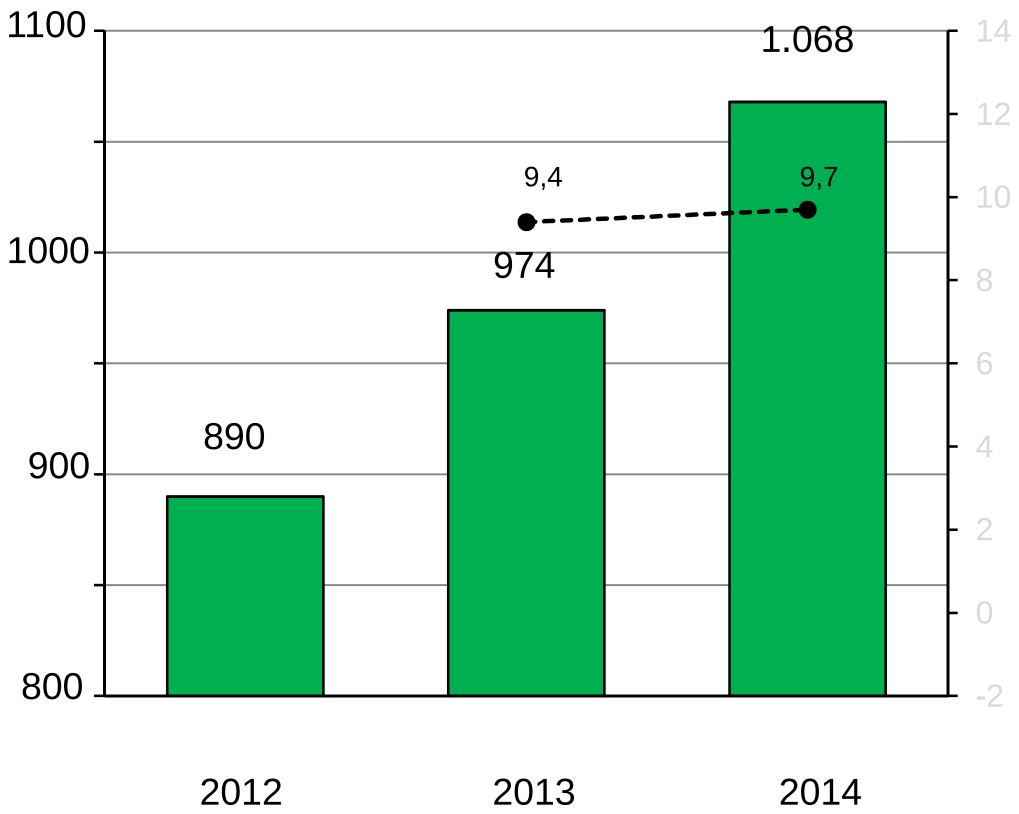
Botanicals cover 46% in value and 43% in volume of the food supplements market in Italy

8 on the Top10 areas are > 50% botanicals

Source: IMS Health Multichannel

Botanicals – Italian market trend

Sales 2012 – 2014 all channels (€ Ml)



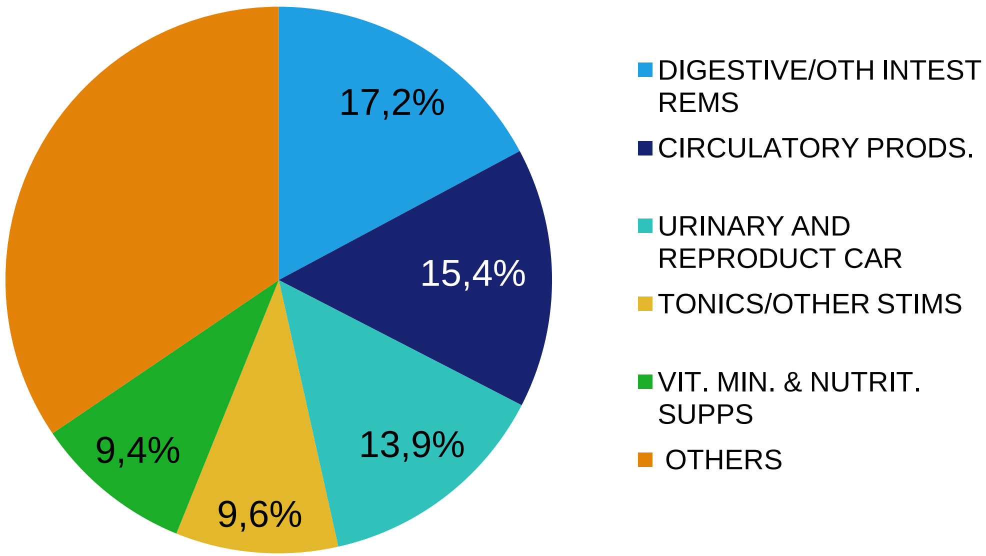
Local sales are growing significanly above average OTC pace

Consumptions, as well, have a positive trends driven by cultural tendecies and demographics

Source: IMS Health Multichannel

Botanicals – Market share by segment

Italy – Key five segments sum up to 65% of total market

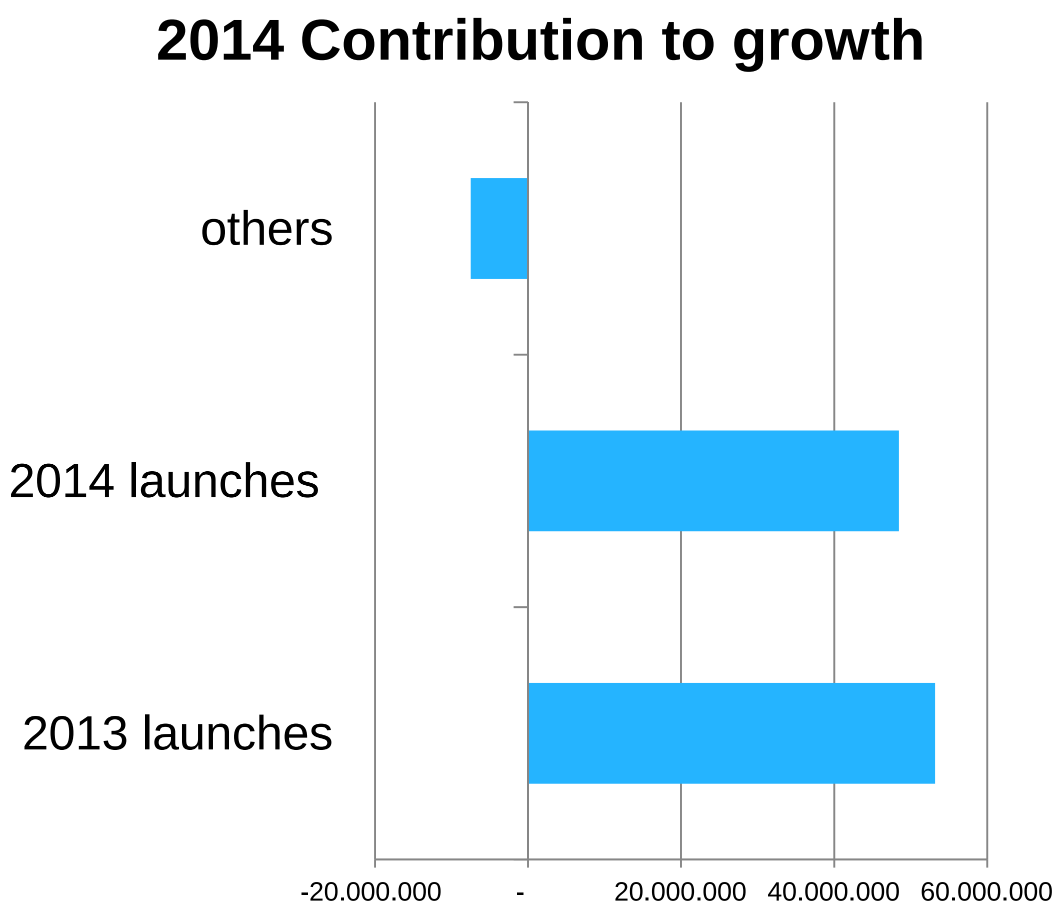


Key segments for botanicals are digestive, cardio vascular and genitourinary preparations.

Source: IMS Health Multichannel

Innovation is key

Most of the market growth is driven by the new products



950 new brands in 2013

1050 in 2014

but

400 only with an yearly turn over > 50K

Source: IMS Health Multichannel

Thank you

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