

IQVIA

Substantiation Letter

27th July 2023

Ego Pharmaceuticals Pty Ltd
6 Oppenheim Way
Dandenong South, VIC. 3175

Re: QV Skincare has been Australia's No.1 Ranked (Sell In) Dermatological Skincare Brand for 10 years

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Re: QV Skincare has been Australia's No.1 Ranked (Sell In) Dermatological Skincare Brand for more than 13 years.

This letter verifies that the sell in sales data below confirms that **QV is the number one ranked brand** in the Australian Pharmacy ATC D2A Dermatological Skincare Market. This is based on the below data points:

- From - July MAT 2011 to MAT June 2023 inclusive (13yrs)
- IQVIA defines the Therapeutic Skin market as 'dermatological skincare brands' which are sold within Australian Pharmacy
- ATC D2A defined data base
- Includes values (AUD) and units

| Rank | Manufacturer | MAT Jul 2011 | | MAT Jul 2012 | | MAT Jul 2013 | | MAT Jul 2014 | |
|------|-------------------|--------------|------------|--------------|------------|--------------|------------|--------------|------------|
| | | Units | Dollars | Units | Dollars | Units | Dollars | Units | Dollars |
| 1 | EGO | 2,830,771 | 27,867,193 | 3,054,228 | 31,256,884 | 3,417,685 | 35,656,486 | 3,717,766 | 40,082,130 |
| 2 | GALDERMA | 1,272,967 | 11,638,101 | 1,455,870 | 13,452,210 | 1,695,448 | 16,423,860 | 1,646,678 | 16,435,807 |
| 3 | INOVA | 1,392,631 | 12,311,092 | 1,457,069 | 13,064,449 | 1,480,658 | 14,248,343 | 1,370,192 | 13,628,733 |
| 4 | JOHNSON & JOHNSON | 843,817 | 4,950,428 | 837,730 | 4,686,529 | 976,840 | 5,434,317 | 1,221,727 | 6,818,910 |
| 5 | BLACKMORES | 1,164 | 5,864 | 15,383 | 76,739 | 15,475 | 74,886 | 18,631 | 92,636 |
| 6 | NICE PAK PRODUCTS | 382,996 | 2,370,821 | 466,389 | 2,965,619 | 546,644 | 3,422,123 | 651,129 | 4,288,549 |
| 7 | KEY PHARMA | 1,151,071 | 4,667,825 | 1,143,914 | 4,677,698 | 1,217,385 | 5,010,238 | 1,189,841 | 5,016,475 |
| 8 | UNILEVER | 1,223,544 | 4,405,668 | 1,233,752 | 4,662,651 | 1,216,883 | 4,509,610 | 1,367,776 | 5,058,910 |
| 9 | RECKITT BENCKISER | 393,730 | 3,325,783 | 439,542 | 3,785,345 | 490,265 | 4,510,257 | 491,306 | 4,714,831 |
| 10 | BDF AUSTRALIA | 771,610 | 2,066,432 | 813,671 | 2,127,206 | 899,893 | 2,278,996 | 1,000,666 | 2,443,768 |

| Rank | Manufacturer | MAT Jul 2015 | | MAT Jul 2016 | | MAT Jul 2017 | | MAT Jul 2018 | | MAT Jul 2019 | |
|------|-------------------|--------------|------------|--------------|------------|--------------|------------|--------------|------------|--------------|------------|
| | | Units | Dollars | Units | Dollars | Units | Dollars | Units | Dollars | Units | Dollars |
| 1 | EGO | 4,207,301 | 43,879,854 | 4,628,754 | 48,640,693 | 5,127,668 | 54,100,428 | 5,474,945 | 58,679,681 | 5,674,556 | 64,371,181 |
| 2 | GALDERMA | 1,668,996 | 16,613,649 | 1,961,758 | 19,213,444 | 2,098,567 | 20,830,816 | 2,247,718 | 22,022,176 | 2,316,217 | 23,821,346 |
| 3 | INOVA | 1,339,095 | 13,224,825 | 1,407,717 | 14,249,153 | 1,471,461 | 15,289,843 | 1,559,234 | 16,590,103 | 1,543,762 | 17,084,218 |
| 4 | JOHNSON & JOHNSON | 1,392,808 | 8,350,627 | 1,510,426 | 10,032,016 | 1,752,390 | 12,094,430 | 1,842,042 | 13,778,418 | 1,992,480 | 15,886,443 |
| 5 | BLACKMORES | 1,039,748 | 5,608,106 | 4,024,805 | 27,528,094 | 2,872,084 | 22,307,001 | 3,034,215 | 23,125,016 | 1,613,170 | 11,330,062 |
| 6 | NICE PAK PRODUCTS | 775,482 | 5,317,723 | 856,635 | 5,823,713 | 1,029,041 | 6,901,427 | 1,234,945 | 8,116,797 | 1,416,186 | 9,287,269 |
| 7 | KEY PHARMA | 1,169,383 | 5,120,705 | 1,203,949 | 5,483,720 | 1,353,204 | 6,166,317 | 1,600,761 | 6,646,219 | 1,667,627 | 6,770,063 |
| 8 | UNILEVER | 1,297,283 | 4,690,056 | 1,238,091 | 5,205,883 | 1,523,787 | 5,557,750 | 1,603,509 | 5,763,794 | 1,592,000 | 5,669,957 |
| 9 | RECKITT BENCKISER | 432,753 | 4,284,028 | 362,644 | 3,608,354 | 378,319 | 3,925,145 | 369,024 | 3,835,058 | 524,997 | 5,008,367 |
| 10 | BDF AUSTRALIA | 1,060,175 | 2,608,681 | 1,149,323 | 2,880,425 | 1,294,379 | 3,339,961 | 1,529,040 | 4,016,437 | 1,706,617 | 4,493,227 |

| MAT June 2020 | | | |
|---------------|-------------------|------------|-----------|
| Rank | Manufacturer | Dollars | Units |
| 1 | EGO | 70,971,083 | 5,641,365 |
| 2 | GALDERMA | 27,510,663 | 2,394,085 |
| 3 | INOVA | 19,107,075 | 1,448,399 |
| 4 | JOHNSON & JOHNSON | 18,254,768 | 2,041,781 |
| 5 | NICE PAK PRODUCTS | 10,133,913 | 1,506,249 |
| 6 | KEY PHARMA | 6,715,977 | 1,560,004 |
| 7 | RECKITT BENCKISER | 6,252,286 | 571,268 |
| 8 | UNILEVER | 5,984,043 | 1,490,312 |
| 9 | ASPEN PHARMA PL | 5,135,392 | 663,628 |
| 10 | BLACKMORES | 5,041,189 | 668,448 |

| | | 2021 | |
|------|-------------------|-----------|-------------|
| Rank | Company | Units | Values |
| 1 | EGO | 7,882,665 | 130,864,586 |
| 2 | GALDERMA | 3,477,699 | 52,870,579 |
| 3 | INOVA | 2,365,031 | 42,845,233 |
| 4 | JOHNSON & JOHNSON | 2,844,094 | 32,787,343 |
| 5 | NICE PAK PRODUCTS | 2,355,734 | 20,818,470 |
| 6 | KEY PHARMA | 2,308,594 | 13,035,076 |
| 7 | UNILEVER | 2,133,474 | 11,817,010 |
| 8 | RECKITT BENCKISER | 750,677 | 10,519,777 |
| 9 | ASPEN PHARMA PL | 924,109 | 9,250,498 |
| 10 | BDF AUSTRALIA | 1,820,648 | 6,923,772 |


| | ATC3 = D02A - EMOLLIENTS & PROTECTIVES | | |
|------|--|--------------|-----------|
| | Australia DDD CMB Monthly | Relative MAT | |
| | | MAT 2022/06 | |
| Rank | Company | Values | Units |
| 1 | EGO | 74,030,669 | 5,605,669 |
| 2 | GALDERMA | 33,997,958 | 2,654,974 |
| 3 | INOVA | 27,654,112 | 1,705,489 |
| 4 | JOHNSON & JOHNSON | 21,083,722 | 2,095,266 |
| 5 | KEY PHARMA | 6,682,628 | 1,533,266 |
| 6 | NICE PAK PRODUCTS | 6,596,816 | 755,267 |
| 7 | UNILEVER | 6,545,992 | 1,426,818 |
| 8 | LACORIUM HEALTH AUS | 6,117,808 | 1,053,511 |
| 9 | RECKITT BENCKISER | 5,917,012 | 495,840 |
| 10 | ASPEN PHARMA PL | 5,186,324 | 634,247 |

| | | | |
|------|--|-------------|-------------|
| | ATC3 = D02A - EMOLLIENTS & PROTECTIVES | MAT 2023/06 | |
| | Company | Units | Values |
| Rank | EGO | 8,129,674 | 131,194,355 |
| 1 | GALDERMA | 4,159,112 | 70,102,055 |
| 2 | INOVA | 2,738,360 | 50,967,590 |
| 3 | JOHNSON & JOHNSON | 3,160,265 | 40,371,833 |
| 4 | NICE PAK PRODUCTS | 1,726,199 | 18,190,194 |
| 5 | LACORIUM HEALTH AUS | 2,090,020 | 14,959,929 |
| 6 | KEY PHARMA | 2,584,285 | 14,692,603 |
| 7 | UNILEVER | 2,089,938 | 12,084,118 |
| 8 | CLOROX AUST P/L | 891,283 | 10,244,903 |
| 9 | BDF AUSTRALIA | 2,253,691 | 9,872,277 |
| 10 | ASPEN PHARMA PL | 984,359 | 9,702,324 |

Please note that:

- While we have provided the above written confirmation of what we report in your Skincare database, IQVIA does not endorse any client claim.
- Ego may only make use of our name in association with the information it may reference in its claim.
- Any Ego claim that relies on IQVIA data must contain the following citation: IQVIA, Ego Dermatological Skincare, Australia Pharmacy Value & Unit Sales, sell in data June MAT 2023.
- This letter is valid for 12 months from the date of issuance.
- We consent to the use of the results referenced in this letter in an advertisement or public communication on the condition that Ego indemnifies and holds harmless IQVIA and IQVIA's affiliates and their officers, directors, shareholders, members, agents and employees against all claims, damages, loss or expenses (including attorney's fees) relating to Client's disclosure of IQVIA information.

Best regards,

DocuSigned by Gerard Mulroney
 *Gerard Mulroney* | I approve this document
July 27, 2023 | 6:29:28 PM PDT
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July 27, 2023

Gerard Mulroney
Senor Director, Consumer Health
IQVIA Australia

