

# IQVIA

## Substantiation Letter

27<sup>th</sup> 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

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

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

Gerard Mulronev  
Senor Director, Consumer Health

**IQVIA Australia**

