pharmalinea
unique in private label

>your< iron line

clinically supported private label iron supplements

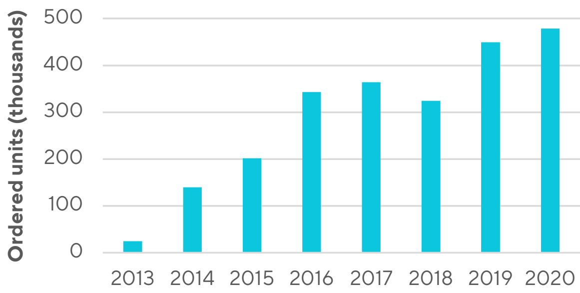
BUSINESS CASE

executive summary.

1 >Your< Iron Line has clear advantages.

- awarded taste
- significantly diminished chance of side effects
- clinically proven high efficacy

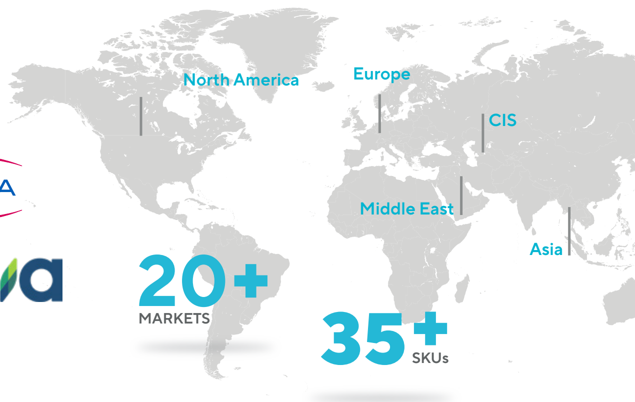
2 Proven by success cases.



nearly
500k
units per year
in a market of under 20 million people

3 Trusted by leaders.

- launched by brands like subsidiaries of STADA and Teva
- present in 20+ markets



4 New clinical trial increases opportunity.

>Your< Iron Syrup was proven to increase ferritin levels in iron-deficient children back to healthy levels.

clinically proven:
69%
increase of mean ferritin levels

>your< iron line.

An awarded line of clinically supported private label iron food supplements. Due to the user-friendly experience and high efficacy, it achieves doctor recommendation, high consumer retention, and, in several cases, a market-leading position.

3 clear product advantages

awarded taste

The vast majority of the market comes with a highly unpleasant metallic taste that affects compliance significantly. PharmaLinea's R&D succeeded in developing a proprietary liquid product matrix that simultaneously enables product stability, efficacy, and outstanding taste. Our liquid iron product was awarded for taste at Vitafoods.

significantly diminished chance of side effects

Severe side effects (diarrhea, nausea, gastric irritation, etc.) are very common due to frequently used low-cost iron sources. >Your< Iron Line, with its proprietary product matrix and superior iron source, achieves a diminished chance of side effects, as recently shown in a clinical trial on >Your< Iron Syrup.

clinically proven efficacy

Not only can efficacy be low due to poorly bioavailable iron salt sources, but it is also hardly ever clinically proven on finished supplement products. >Your< Iron Line is supported by a clinically studied iron source and, as of recently, also a gold standard clinical trial on >Your< Iron Syrup.

Dosages: from 7 to 35 mg of elemental iron in the form of branded micronized, microencapsulated ferric iron.
Addressing both children and adults.
Galenic forms: capsules, syrup, drops, spray.

caste study #1.

Our client in the EU launched products from >Your< Iron Line and is now reaching nearly 500.000 ordered units per year.

Upon launch, the iron market was dominated by drugs. Iron supplements were a less developed and relatively small market. Our clients addressed doctors that were not accustomed to recommending iron supplements.

Through a dedicated medical detailing campaign and because of the products' advantages, our client was able to achieve doctor and pharmacist recommendation nationwide. Immense growth began and the brand achieved the no. 1 position in the market.

Market growth came from:

- new users (doctors gained confidence to prescribe our products to non-anemic iron-deficient patients that would before be advised simply on an iron-rich diet)
- existing users switching to our products
- increased customer retention due to high compliance (with most products the taste and side effects prevent the second purchase)

The same opportunity still exists in markets where drugs or supplements with poor taste and side effects dominate the market.

However, some iron supplement markets today are more developed, with advanced products that have, for instance, a user-friendly delivery form. An example is case study #2.

market: a country in the European Union

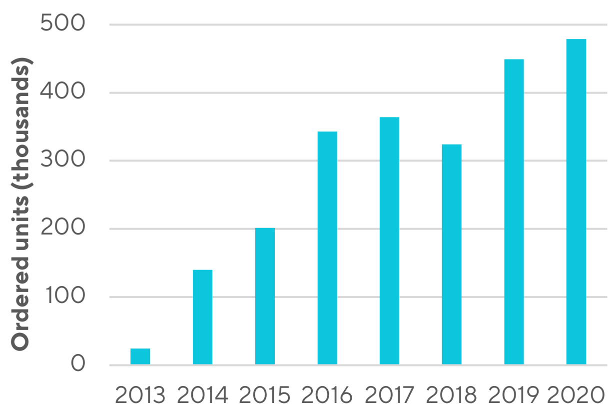
population: under 20 million

iron market: dominated by drugs

client: supplement brand focused on science, clinical support, and promotion through medical detailing

products: >Your< Iron Capsules
>Your< Iron Syrup
>Your< Iron Drops

case #1 - nearly 500k units/year



Note: these results were achieved even before the recently published clinical trial on >Your< Iron Syrup.

caste study #2.

In this more recently launched case, the local iron supplement market was more developed, with several advanced products. Two brands in particular dominated the market, jointly holding more than 45% market share in 2018. They both advertised improved absorption and absence of side effects. Despite their added-value positioning, advertised benefits, and user-friendly forms, our product line is proving to be superior in those same points, as well as in taste.

Our client focused their promotion on medical detailing. They are steadily winning doctor and pharmacist recommendation and overtaking market share. Had it not been for the drop in doctor-patient communication in 2020, they might have already achieved the no. 1 position in the market.

market: a country in Eastern Europe

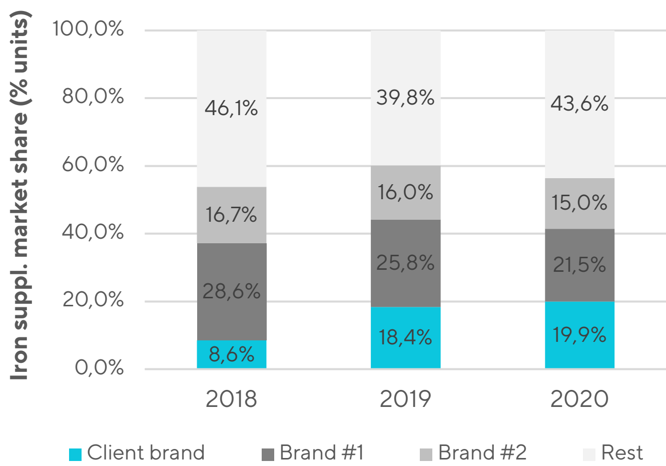
iron market: the iron supplement market was developed and dominated by 2 brands

client: subsidiary of a global pharma brand

products: >Your< Iron Capsules
>Your< Iron Forte Capsules
>Your< Iron Syrup
>Your< Iron Drops

These are only 2 examples. >Your< Iron Line has been launched in over 20 markets. In several cases, the products are market-leading and in several cases they are selling 10.000 - 25.000 units per million people per year. This strong track record enables us to confidently say that with the right partner our product line has great potential in very different markets.

case #2 - overtaking market share



75% CAGR (2018 - 2020)

1% CAGR (2018 - 2020)

11% CAGR (2018 - 2020)

Source: IQVIA sell-out data

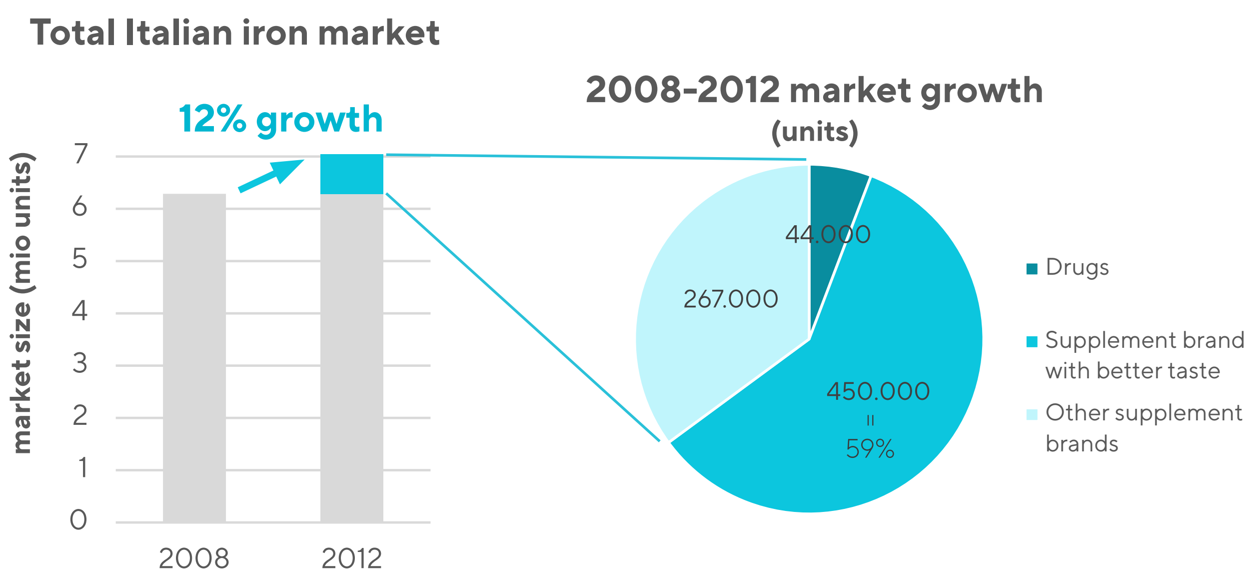
why is iron overlooked?

The iron market is not an obvious target for new supplement launches as it can be dominated by drugs. Supplements can be comparatively small and the market opportunity is not clear when looking at past data. However, there is proven potential for supplements to create substantial market growth.

In 2008-2012 the Italian iron market grew by 12%. **94% of the entire growth** was attributable to iron supplements and 59% was due to a single supplement brand with better taste and form. In 2012, that brand surpassed 500.000 units in yearly sales.

In Germany, the iron supplement sector grew with a CAGR of 25,3% in 2016-2020, whereas the CAGR for drugs was only 0,5%. In fact, **the supplement sector more than doubled** in size since 2016. Doctors are recognizing supplements as a valid option to prescribe to non-anemic iron deficient patients.

Chances are that iron supplements present a similar opportunity in your market, because iron deficiency is a global and constant issue.



Source: IQVIA sell-out data

market size & outlook.

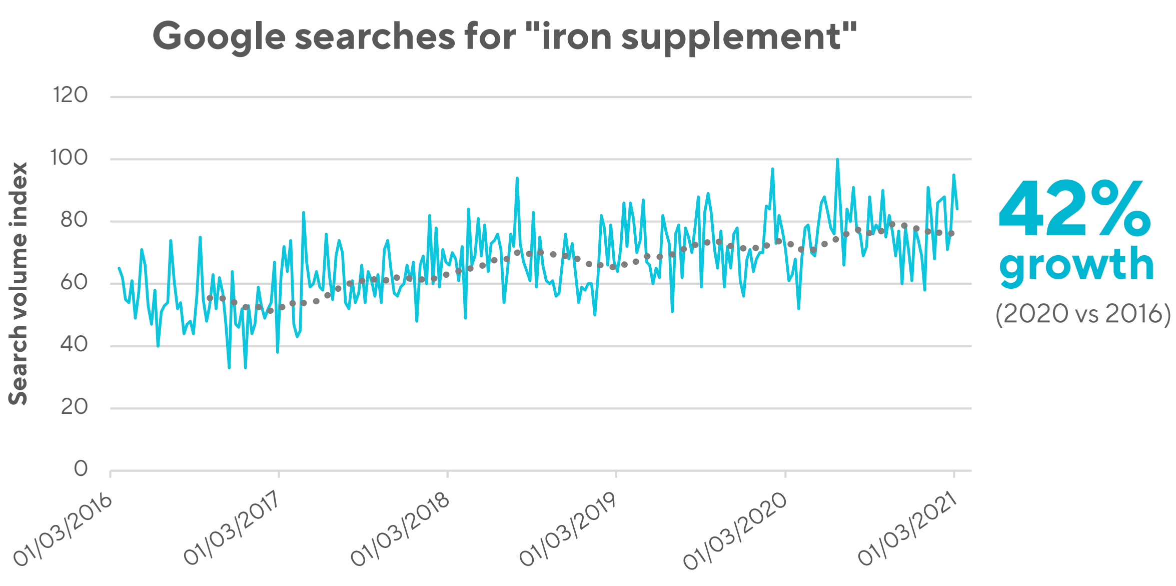
Iron supplements are a sound new product launch investment as the target consumer group is substantial and the issue is far from a fleeting trend.

Iron deficiency is the most common nutritional deficiency in the world, affecting particularly women of reproductive age and children. According to the last official report by the WHO, anemia affected nearly 25% of the global population and up to **50% of cases** are due to iron deficiency. Iron deficiency anemia is estimated to affect 33% of all women of reproductive age and over 40% of children under 5 years of age.

Several factors impacting iron levels are projected to remain: lack of balanced diet, environmental factors, various health problems, and smoking. The issue is so alarming that anemia is subject of WHO's Global Nutrition Targets 2025 and **WHO has created guidelines** for preventive iron supplementation.

The publicity is steadily raising awareness and translating into iron supplement interest by consumers. Google searches for "iron supplement" have **grown by 42%** in the past 4 years.

In 2019, the category was projected to grow with an above industry average growth rate - a **CAGR of 9,3%** for the period of 2019-2025 (source: Credence research).



Source: Google trends

facilitated marketing.

Iron deficiency is subject to 3 factors that facilitate marketing and make the opportunity so substantial.

1

It is a very serious and widespread problem.
No need to artificially create demand through marketing. It's essential to health so purchase motivation is high, regardless of the financial situation.

2

The solution is well-known.
The answer is clear - increased iron intake. Iron is widely recognized - no need to spend large budgets on educating consumers on a completely new ingredient.

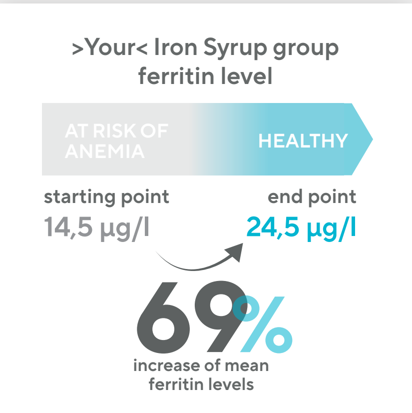
3

The available products have severe & obvious flaws.
The vast majority of the iron supplement market has very evident drawbacks (poor taste, severe side effects, and low efficacy). These are immediately noticed by consumers and they are driven into seeking new solutions. Additionally, direct clinical support of efficacy is very rare, facilitating promotion of clinically-backed products through medical detailing.

clinically proven.

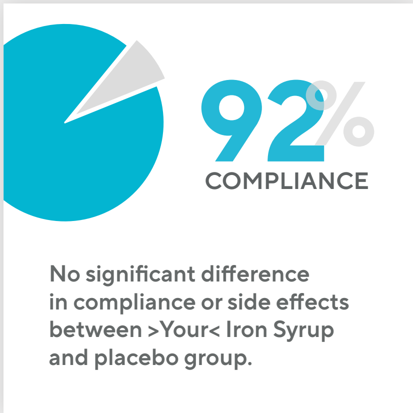
Recently, >Your< Iron Syrup was clinically proven to correct iron status in iron-deficient children and help them avoid anemia. The trial also confirmed feedback on high compliance and absence of side effects. This takes the opportunity to a new level, as no one in the market has comparable clinical data.

The clinical trial on >Your< Iron Syrup is the first relevant clinical trial on iron supplements for children. Others are performed on anemic subjects or on an iron dose, that is categorized as a drug. The trial is leading in terms of gold standards of good clinical practice: randomized, double-blind, placebo-controlled, multi-centric, and performed on a statistically relevant number of non-anemic subjects (85).



>Your< Iron Syrup was able to restore ferritin to healthy levels and thus help iron-deficient children avoid anemia.

Your< Iron Syrup group showed significantly higher values for 4 widely recognized indicators of iron status.



The product was found to be well tolerated & safe. Compliance was high and there were no confirmed related severe adverse events.

The trial confirmed that our R&D developed a product that is both very well accepted and efficient. All products in >Your< Iron Line share the same iron source and all liquid products share the same product matrix, so the trial results can also support their efficacy.

Register for the webinar on the clinical trial results

Wed, 26th of May

(available on-demand afterwards)

link to study publication in MDPI Nutrients

product line overview.

>YOUR< IRON CAPSULES
dosage (1 capsule):
Qfer (15 mg Iron)
Vitamin C (60 mg)
Market leader in several markets.

>YOUR< IRON FORTE LIQUID
dosage (5 ml):
Qfer (35 mg Iron)
Vitamin B12 (1,25 mcg)
Vitamin B6 (0,7 mg)
Adult liquid product with awarded taste.

>YOUR< IRON SYRUP
dosage (5 ml):
Qfer (14 mg Iron)
Vitamin B12 (1,25 mcg)
Vitamin B6 (0,7 mg)
Clinically proven to correct iron status in iron-deficient children.

>YOUR< IRON ONLY DROPS
dosage (28 drops):
Qfer (14 mg Iron)
Preservative-free drops for the most delicate young users.

>YOUR< IRON FORTE SPRAY
dosage (4 sprays):
Qfer (14 mg Iron)
Convenient solution for adults.

>YOUR< IRON SPRAY
dosage (6 sprays):
Qfer (7 mg Iron)
User-friendly form for children.

>YOUR< IRON FORTE CAPSULES
dosage (1 capsule):
Qfer (30 mg Iron)
Vitamin C (60 mg)
Market leader with higher iron content.

What is Qfer?

Qfer is a branded micronized, microencapsulated ferric iron source with a unique delivery system for improved absorption. It has several studies supporting its efficacy and it has been shown to be superior in bioavailability when compared to common iron sources such as iron sulfate, iron fumarate, and iron pyrophosphate (2.7x, 4.7x, and 3.5x higher absorption, respectively).

2,7x improved absorption

of Qfer compared to iron sulfate over 12h

why launch?

There is proven market potential. Established brands, focused on clinical support and medical detailing, have an outstanding track record with >Your< Iron Line.

The products are ready to launch and save you not only years of product development, but also years of clinical research. With the future pipeline of planned research on the product line, competitors will always be a step behind.

contact.

For more information on >Your< Iron Line or any of our other products, you are welcome to contact us using the information below.

We will be happy to provide you with details on each individual product, in-depth case studies, clinical studies, product specifications, and more, as we move forward.

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