

>your< UTI free sachets

clinically supported private label urinary tract supplement

BUSINESS CASE



executive summary.

1

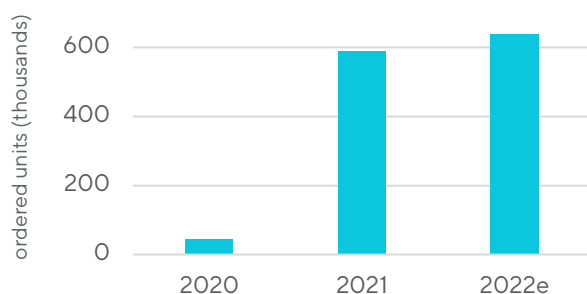
>Your< UTI Free Sachets have clear advantages.

- highly efficient and clinically supported formulation
- leading branded cranberry ingredient
- tasty, convenient, preservative-free & sugar-free



2

The market response is outstanding.



Case study:

590

thousand ordered units in 2021

3

Proven in various regions.

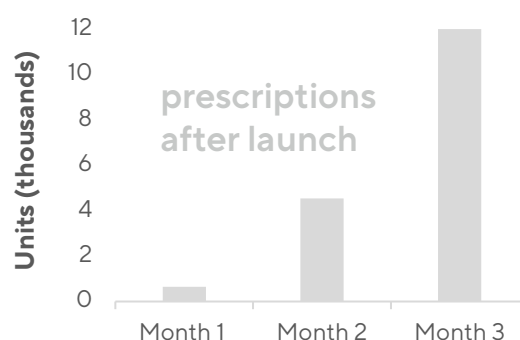
Successfully launched in several very different markets in Europe, CIS, and the Middle East.



4

Successful through medical detailing.

Quality of clinical support, stability data, and relevant dose enable urologists' recommendation and high prescription rates.



>your< UTI free sachets.

A clinically supported private label food supplement supporting both the prevention and treatment of UTI through powerful anti-adhesion properties. Due to the high efficacy, user-friendly experience, and natural alternative positioning, it achieves doctor recommendation and an outstanding market response.

3 clear product advantages

leading ingredient

>Your< UTI Free Sachets are based on the best available branded cranberry extract with a unique production process and an advanced delivery system protecting proanthocyanidins (PACs) for controlled release. Cranberry is recognized by consumers and in high demand, and this is its best version.

highly efficient and clinically supported

An extensive R&D process resulted in a highly efficient formulation that combines cranberry with a microencapsulated vitamin D3 source and D-mannose in a single sachet. The reported efficacy is outstanding and has prompted further research on the product. 6 gold standard clinical trials demonstrate the cranberry ingredient's efficacy in prevention of UTIs and their recurrence.

great user experience

PharmaLinea's development expertise enabled the delivery of the active ingredients in a single tasty, convenient, water-dispersible powder sachet. The sachets are preservative-free, as well as sugar-free, and are thus fit for the most demanding consumers.



target group

women

recommended dosage

1 sachet/day

no. of dosages

8

formulation.

1 sachet includes:

Qcran (500 mg)

D-mannose (2000 mg)

QvitD3 (40 IU Vitamin D3)

Qcran

>Your< UTI Free Sachets contain Qcran, which is one of the most clinically supported branded cranberry extracts. Its unique delivery system protects PACs from extreme conditions in the gastrointestinal tract, enabling their controlled release. This is a clear differentiator against any competitor PAC source. A patented manufacturing process preserves the whole cranberry fruit with all its natural compounds, offering powerful synergistic action.

4x

4x fewer subjects experienced UTI recurrence upon supplementation with Qcran when compared to placebo and 1,75x fewer when compared to common cranberry extract

lower recurrence
of cystitis with Qcran

Effectiveness in terms of significant improvement in UTI recurrence was shown in numerous clinical studies together involving over 700 subjects.

Cranberry compounds, mainly PACs, inhibit the bacterial biofilm formation by *E. coli* in the urinary epithelium. PACs attach to the bacteria's surface and prevent them to adhere to the epithelial cells in the mucosal lining. Consequently, the bacteria are washed out of the body with urine.

D-mannose

The success and popularity of D-mannose containing products is growing. According to Euromonitor, the globally leading urinary tract health supplement brand now features a D-mannose product, the number 1 Canadian UTI supplement contains a combination of cranberry and D-mannose, and the list goes on. An exemplary case is that of a D-mannose-based product that entered the German market in 2018, caught on very well, grew with a 3-year CAGR of 61%, and claimed 2nd place in the market with 16% market share in 2021 (IQVIA).

D-mannose acts as a competitive inhibitor, binding to FimH adhesins on bacterial surface and blocking bacterial colonization. Several studies report that D-mannose supplementation significantly reduces the risk of recurrent UTI.

QvitD3

Vitamin D3 in >Your< UTI Free Sachets is in a microencapsulated and water-dispersible form, which provides protection from light and acids and prevents cross-interaction with other ingredients, thus enhancing the efficacy of the product.

Recurrent UTIs have been associated with vitamin D3 deficiency. Bladder epithelial cells secrete an antimicrobial peptide, which protects the urinary tract from pathogens. It has been shown that vitamin D3 can help increase the expression of this peptide. Thus, vitamin D3 is suggested to be an excellent complement for the management of UTI.

case study #1.

Our client in the CIS region launched >Your< UTI Free Sachets in Q4 2020 and reached 590.000 ordered units in their second year post-launch.

The client launched the product in an established market with several long-standing brands with loyal doctors and consumers. Through an extensive medical detailing campaign with 6 national events, 42 regional events, 70% urologists and 15% GPs covered by F2F visits, they were able to immediately grow prescription rates to a top 3 position. Support of doctors and KOLs was readily obtained due to the solid clinical support and relevant dosages in >Your< UTI Free Sachets.

Simultaneously, the reception of the product by consumers was immediate and immense. The client's stocks were depleted in a matter of months and orders rose from 46.000 units in 2020 to 590.000 units in 2021.

market: a country in the CIS region

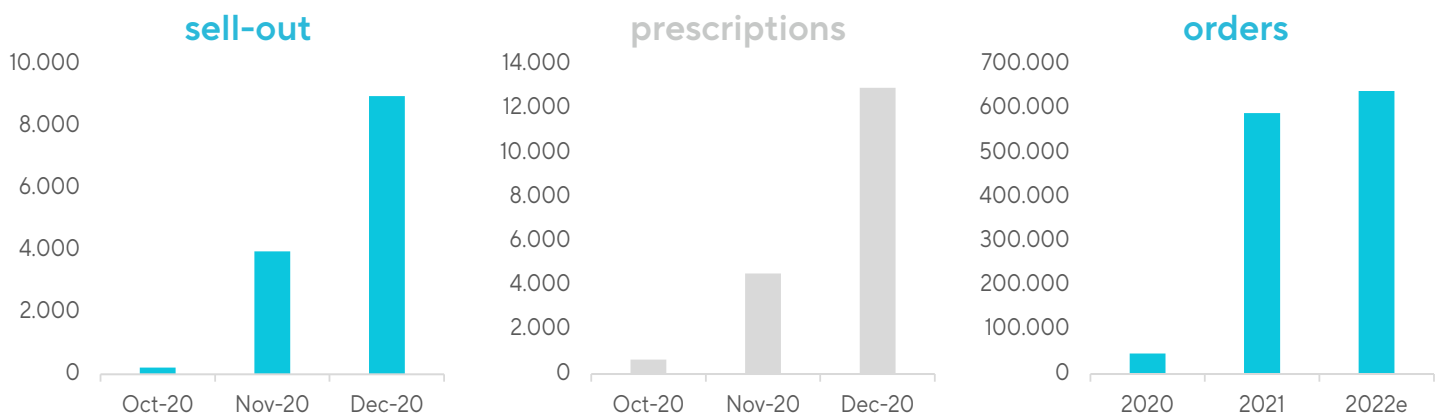
UTI market: mature market, dominated by phytotherapeutic OTC products

client: large pharmaceutical company establishing a supplement division

key results in just 3 months after launch:

- 13.000 sold units
- 18.000 prescribed units
- No. 1 urologist-prescribed product with D-mannose

CIS region case study: immediate market response (3 months post-launch) and long-term success



other case studies.

>Your< UTI Free Sachets have been successfully launched in several markets in Europe, the Middle East and CIS region

Two thirds of cases are averaging between 3.000 – 4.000 units per million inhabitants per year. These are all relatively young projects, with the average duration of only 3 years.

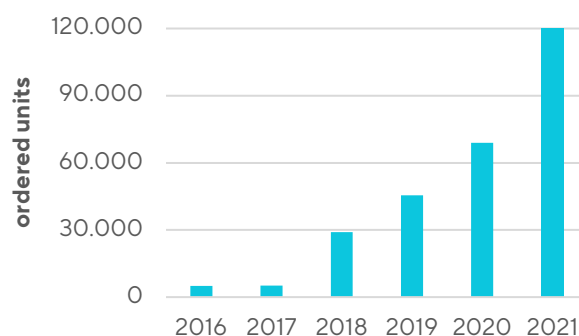
In each of the cases, the marketing strategy is based on urologist and GP detailing, premium price positioning, and sales through pharmacies.

This strong track record and consistent business model enables us to confidently say that with the right partner our product has great potential in very different markets.

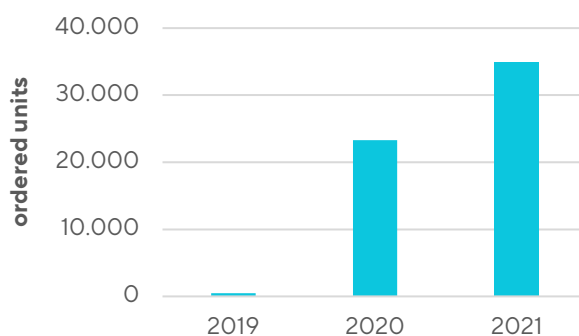
Example of premium price positioning strategy of a successful client launch

Product	Doses	Price per dose vs. market leader
Market leader	10	100%
Brand X	20	66%
Brand Y	15	49%
Brand Z	30	25%
Client Brand	8	205%

Case study - Middle East



Case study - Central Europe



Average yearly sales of 2/3 of cases:

3.000 – 4.000
units per million inhabitants

facilitated marketing.

Urinary tract health is subject to 3 factors that facilitate marketing and make the opportunity so substantial.

1

It is a serious and widespread problem.

No need to artificially create demand through marketing. It's essential to wellbeing so purchase motivation is high, regardless of financial situations.

2

The ingredient is well-known.

Cranberry supplements are widely recognized - no need to spend large budgets on educating consumers on a completely new ingredient.



3

Most products are commodity-based.

Except for the most advanced markets, products mainly consist of cheap commodities and aim for price competition. The premium segment and promotion through medical detailing are mostly unsaturated. Direct clinical support of efficacy is very rare, facilitating influence on the first purchase decision through doctors and pharmacists.



future market outlook.

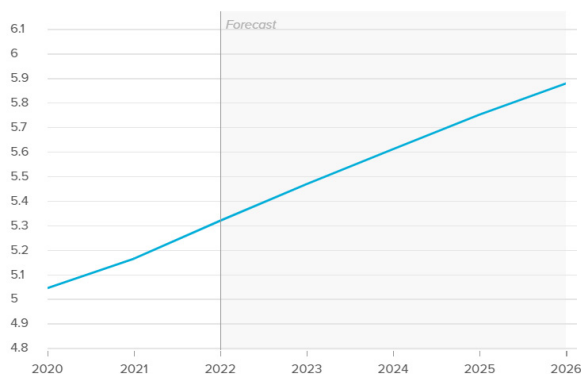
Women's health is a sound investment and not a fleeting trend. When looking at the long-term growth of the past 10 years (CAGR 2011 - 2020), women's health supplements show the second highest growth at over 9%, even higher than digestive health (Euromonitor).

Urinary tract wellness is one of the most credible and successful supplement segments within women's health. This is highlighted by the fact that major pharmaceutical players, such as STADA, Pierre Fabre, Bausch Health, and Novartis, are all present in the market with supplement grade products. Even cranberry

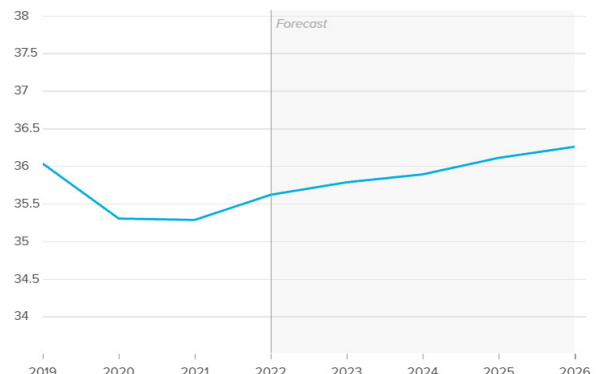
supplements alone are a blossoming category, projected to surpass 400 million USD in 2025 and grow 5,4% in 2021 (Euromonitor).

In several developed markets, cranberry supplements exploded in y-o-y growth in 2020: **19,0%** in Mexico, **15,5%** in Canada, and **13,2%** in the UK. According to PharmaLinea's clients who have launched >Your< UTI Free Sachets, the difficulty of accessing doctors in 2020 enhanced the trend for proactive prevention and self-care, boosting supplement sales in consumers with recurrent urinary tract infections. Cranberry appears to be one of the ingredients most associated with natural prevention of UTIs and has a bright forecast ahead.

Cranberry / Germany
Retail Value Sales (2022) Constant USD million



Cranberry / France
Retail Value Sales (2022) Constant USD million

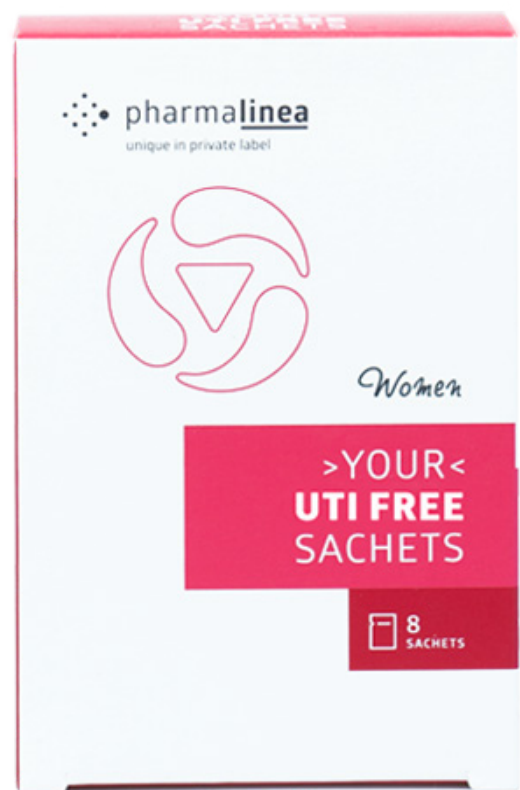


Source: Euromonitor Consumer Health data, September 2021.

why launch?

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

The product is ready to launch and saves you years of product development and stability studies. With the future pipeline of planned research on the product line, competitors will stay a step behind.



contact.

For more information on >Your< UTI Free Sachets 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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