



# GALDERMA AT A GLANCE

Medical Solutions for Skin Health



# Medical solutions for the skin, our interface with the world.

As the medical solutions company within Nestlé Skin Health, Galderma sees beyond simply providing solutions for skin problems.

A focused dermatology company right from the start, Galderma is committed to the healthcare community and to continually improving our understanding of diseases and treatments, aesthetic and corrective solutions, practitioners' and patients' needs.

Dating back to 1961, Galderma is now present in over 100 countries, with an extensive product portfolio of medical solutions to treat a range of dermatological conditions.

Today, Galderma is a global leader in the research and development of scientifically-defined and medically-proven solutions for the skin, hair and nails, partnering with healthcare professionals around the world to meet the skin health needs of people throughout their lifetime.



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# Therapeutic areas

Galderma's therapeutic areas cover a broad range of skin, hair and nail conditions. Driven by our passion for science and an awareness of the negative physical and emotional impact of some of these conditions, we seek to better understand their causes and thus improve the treatment outcomes.

## Acne

Acne is a chronic inflammatory skin disease of the pilosebaceous gland, linked to changes in hormone levels. It mainly affects adolescents and young adults, and may lead to permanent scarring.

**1.5 billion**  
people aged between 15 and 45 suffer from some form of acne – mild, moderate or severe <sup>(1)</sup>.

## Onychomycosis

Onychomycosis (or nail mycosis) is an increasingly common disorder, accounting for 20% of all nail diseases. It affects around 10% of the world population.

**14%**  
of the North American population suffers from onychomycosis <sup>(2)</sup>.

## Skin cancer

Skin cancers refer to melanoma and non melanoma skin cancers (NMSC). Galderma's focus is on NMSC, including actinic keratosis (considered as pre-cancerous lesions), basal cell carcinoma (BCC) and intra-epithelial squamous cell carcinoma (Bowen's disease). Galderma develops solutions for the prevention and treatment of NMSC.

**1 in every 3**  
cancers diagnosed is a skin cancer <sup>(3)</sup>.

## Rosacea

Rosacea is a chronic inflammatory skin condition characterized by facial redness, which is firstly intermittent but then becomes permanent, associated in some cases to papulopustules. Other rare forms of rosacea include rhynophyma and ocular rosacea.

**1 in 10**  
people suffer from rosacea, though the incidence of the disease varies across the globe <sup>(4)</sup>.

## Rare skin diseases

Galderma is currently exploring the treatment of some rare skin diseases, such as cutaneous T-cell lymphomas (CTCL) and Lamellar Ichthyosis (LI).

## Skin senescence

Skin aging is caused by the passage of time and is worsened by chronic UV exposure (actinic damage).

**1 billion**  
people will be over the age of 60 by 2020. All will face skin deterioration as a result of the natural aging process <sup>(5)</sup>.

## Psoriasis and atopic dermatitis

Psoriasis is a chronic, inflammatory skin disorder characterized by red, scaly and sometimes itchy patches. Atopic dermatitis – also known as atopic eczema – is an inflammatory relapsing itchy skin disease associated with xerosis and affecting mainly children, but also adults.

**3,000**  
or more skin diseases are thought to exist worldwide <sup>(6)</sup>.

## Pigmentary disorders

Pigmentary disorders are characterized by an increase or decrease in skin pigment. Melasma (commonly known as the pregnancy mask) is the most frequent disorder.

**63%**  
of patients say psoriasis impacts their overall emotional well-being <sup>(7)</sup>.

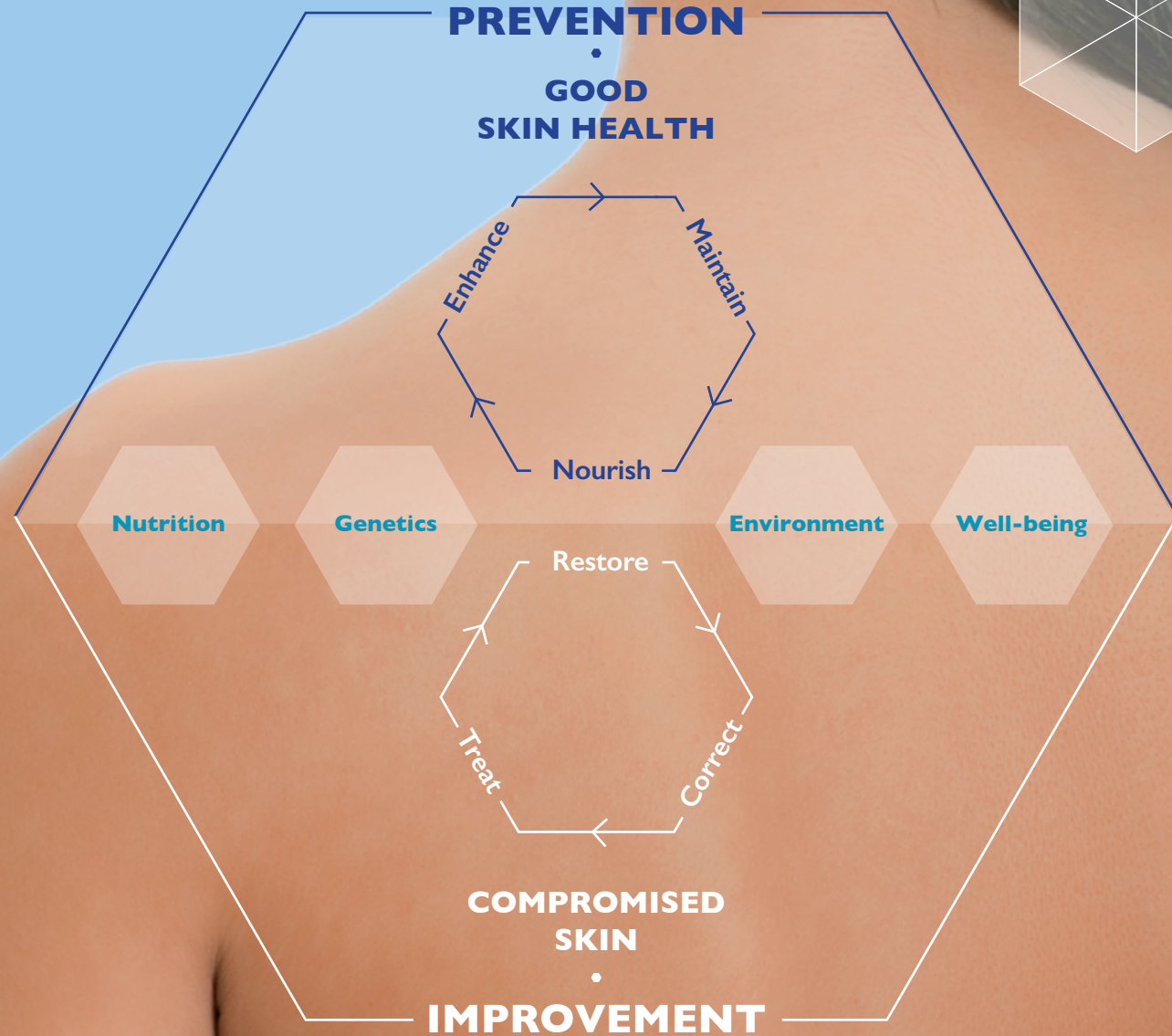
Sources: (1) Kantar Health in 2011-2012 in the US, UK, France, Germany, Brazil. (2) Ghannoum MA et al., J Am Acad Dermatol. 2000. (3) World Health Organization, last accessed May 2015. (4) Culp B, Scheinfeld N. Rosacea: A review. P T. 2009 - National Health Institute: Rosacea (nhs.co.uk, last accessed May 2015)

Sources: (5) EDF\* White Book. (6) United Nations, last accessed May 2015. (7) National Psoriasis Foundation – 2009. Psoriasis patients panel survey. \*European Dermatology Forum

# A holistic view of skin health

The skin is our largest organ. It protects us from harmful environmental factors, acts as an envelope for our body and can influence the way we interact with the world. Healthy skin makes social interaction easier and can have a positive impact on our general well-being.

Today, as we live longer, our needs and expectations are changing. We want to look and feel good, and still play an active role in society. We want our aging skin to overcome the challenges of time. For the skin to meet these needs, we have to focus on maintaining, nourishing, and enhancing its qualities, otherwise on prevention, treatment, or correcting and restoring it to its healthy state.



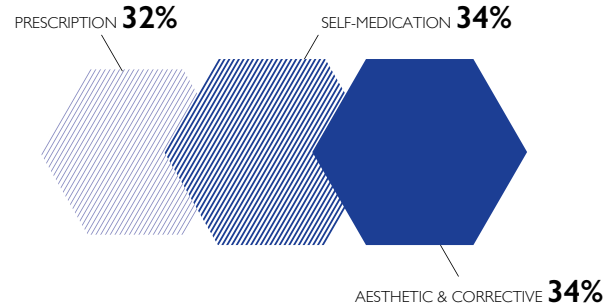
# Brands & Businesses

With a global approach to skin health and three core businesses meeting a full range of dermatological needs, Galderma's various activities leverage the company's powerful research and innovation capacities.

## 3 business units

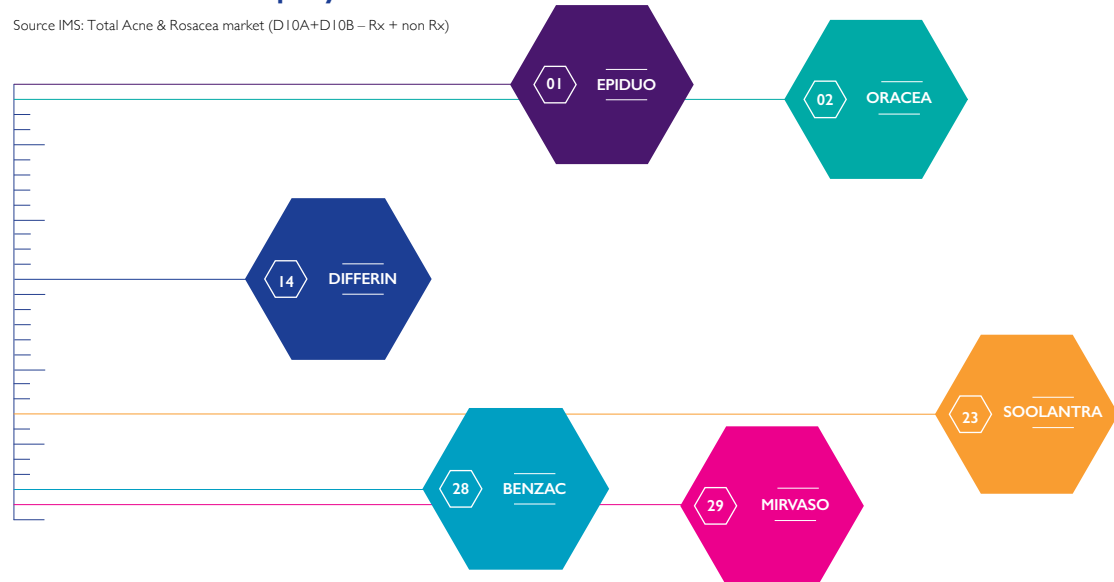
to serve healthcare professionals

Medically-proven solutions are the cornerstone of the Prescription, Self-medication and Aesthetic & Corrective businesses.



## 6 products in the top 30 products for acne and rosacea Galderma - #1 Company in acne

Source IMS: Total Acne & Rosacea market (D10A+D10B - Rx + non Rx)



## Leading medical solutions



### Epiduo #1

Epiduo® Gel is the #1 branded topical acne medication in the world.



### Restylane 28,000,000

Restylane has come a long way since it was first launched in 1996. This wide range of aesthetic treatment options is now celebrating more than 28 million treatments performed worldwide.



### Benzac +21.3%

With +21.3% in global sales, Benzac is the fastest-growing brand in the Top 10 global acne market players operating in pharmacy/drugstores/retail.<sup>2</sup>

1: Source: Internal Calculations based on IMS Health database, IMS Health, IMS MIDAS Bound, MAT Q4 2015, in units & in value (LCD MNF). 2: Source: Nicholas Hall, Global Acne Remedies category, 2015

## Key brands



Nowadays, we hear so much about harmful ingredients and what the environment does to our skin. My baby's skin is so fragile, I want to make sure that I use the safest products available.



I know firsthand how socially disabling a skin disease can be. I can't believe only 41% of acne sufferers actually go and see a doctor to try and find a solution to their skin problem.

# Galderma & the commitment to the dermatology community

Patients and healthcare professionals are the *raison d'être* behind everything we do. Our aim is to provide them with effective dermatological solutions and to make sure that, together with industry and academics, we build a strong and sustainable community to shape the future of dermatology. Thanks to the initiatives in Social Responsibility and Education we have put in place throughout the world, we are having a positive impact on the daily lives of people suffering from skin conditions.



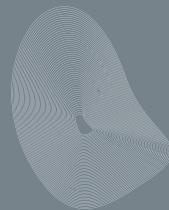
## SkinPact Awards

The annual SkinPact Awards programme recognizes initiatives which advance the field of dermatology and contribute to the wider community. It is divided into two categories: Community Leadership and Excellence in Education, with two awards of \$ 10,000 USD given for each. Two winning projects are selected by the regional scientific societies partnering on the programme and the other two are voted by the international dermatology community. <http://www.galdermaskinpact.org>



## SHIELD centers

Nestlé Skin Health Investigation, Education and Longevity Development centers (SHIELD) are a global network of innovation and education hubs created in response to the expected rise in skin health needs of a rapidly growing aging population. With one center already in New York, this and future hubs across the world will gather today's most creative and visionary thinkers from diverse disciplines in optimal conditions to generate and develop ideas for the advancement of skin health now and in the future.



## Community-focused initiatives

For more than fifteen years, Galderma U.S. has provided grants, volunteers and Cetaphil products so that Camp Wonder can continue to welcome children from around the country, suffering from chronic and life-threatening skin diseases, to take a week's break from being a patient and focus on just being a kid. A similar camp is also in place in Brazil, while in Africa, Europe and Asia, Galderma supports a whole range of initiatives to provide medical assistance, early diagnosis or information on prevention.

## Dermatology training programs



The EuroDerm, LatinaDerm and ChinaDerm Excellence are international educational training seminars for final year Dermatology residents. These in-depth, hands-on courses give some of the best Dermatology students in the three regions the opportunity to be trained on a wide range of dermatological topics by the finest experts in dermatology.

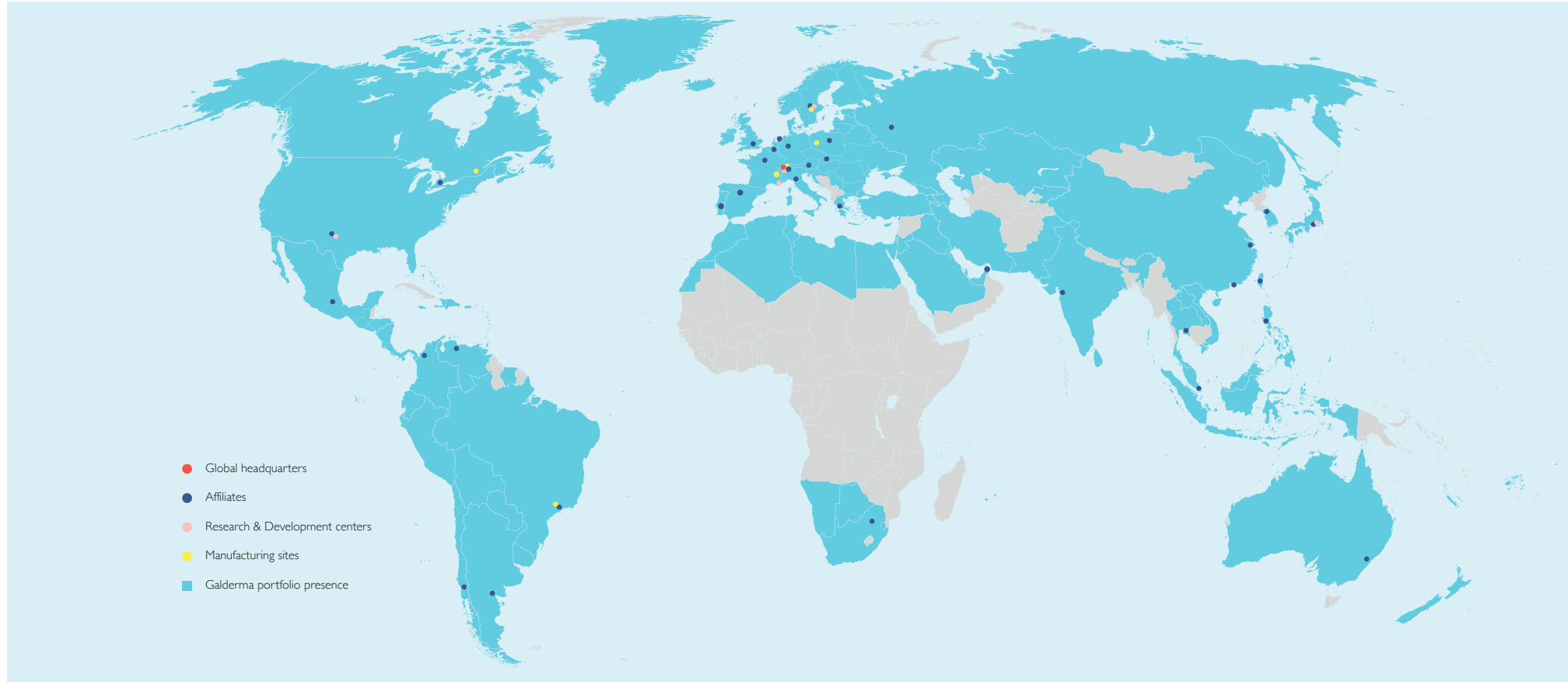


Dermatologists need to learn how to manage consultations with better-informed patients who want to be more involved in discussions on diagnosis and treatment options, in other words, participation rather than paternalization. Euroderm is one of the best training initiatives in the medical world. Dermatology is the only discipline benefiting from such a comprehensive four-to-five-day course that prepares residents for their final board examination.

Professor of Dermatology, Specialist in acne and speaker at Euroderm Excellence

# Worldwide presence

Galderma's reach now exceeds 100 countries, with 35 affiliates and exclusive representation throughout the world.



FIND ALL GALDERMA OFFICES  
AROUND THE WORLD  
ON [WWW.GALDERMA.COM](http://WWW.GALDERMA.COM)

OVER  
**4,000**  
EMPLOYEES  
(42% MEN & 58% WOMEN)

**60**  
NATIONALITIES

GEOGRAPHIC SPLIT

<b>25%</b> APAC	<b>37%</b> EMEA	<b>15%</b> LATAM	<b>23%</b> NAM
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Our products maintain the highest standards of safety and quality. We owe it to patients and practitioners alike.



I'm really proud to work for Galderma. We have the world's biggest Research & Development facility uniquely focused on dermatology. We have always worked closely with the medical and scientific community. This proximity allows us to serve them - and the patients - better.

# Key facts

Product innovation, significant new launches and steady geographic expansion are the three pillars of the company's consistently strong performance.

## International expansion



Stuart Raetzman, CEO Galderma Pharma S.A. and Kamal Abbasi, Regional VP APAC inaugurate the APAC regional offices in Singapore

**Continuing its international growth,** Galderma opened a new branch office in Dubai in 2015, which serves as the regional headquarters for the Middle East and Africa region. In 2016, the Asia Pacific region opened its regional headquarters within the Singapore affiliate.

## Galderma enters the nutraceutical market

In 2015, Galderma acquired certain assets of the Inneov Group to serve as the foundation for its entry into the nutraceutical market.



## Lasting experience in key Aesthetic & Corrective brands



**Restylane** has come a long way since it was first launched in 1996. Not only is it celebrating its 20<sup>th</sup> anniversary in 2016, but also 28 million aesthetic treatments performed worldwide.

**Dysport** is celebrating 25 years of clinical experience in 2016.

## IPSEN partnership extension

In January 2016, Galderma and Ipsen expanded the geographic scope of their distribution agreement, giving Galderma the exclusive rights to distribute Dysport in key markets in the Asia Pacific region. Ipsen also acquired the intellectual property for Galderma's liquid toxin in the region.

## Epiduo Forte launch in U.S.



Epiduo Forte Gel is the first combination of the retinoid, adapalene, and benzoyl peroxide, developed for the moderate to severe acne population. It was launched in September 2015.

## Rosacea range extended



**Galderma's product portfolio of medical solutions** for rosacea patients continues to expand, with further launches of Mirvaso in 10 countries and Soolantra in 19 countries.

## World Congress of Dermatology 2015



The Galderma booth at the WCD 2015

Galderma was one of the main sponsors of this event, which took place in Vancouver, Canada. Key events included 5 scientific symposia, an award ceremony and a live art performance honoring women leaders in dermatology (organised with the Women's Dermatologic Society).

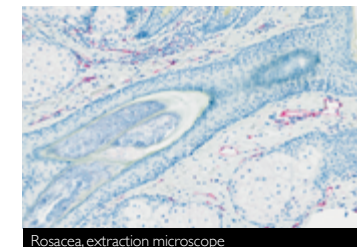
## Antibiotic resistance awareness



Galderma attended the White House Forum on Antibiotic Stewardship

In June 2015, Galderma was invited to the White House forum in recognition of its commitment to provide antibiotic-free treatment options in dermatology.

## R&D key achievements



Rosacea, extraction microscope

Galderma is constantly looking for innovation. Since 2005, the company has affirmed its leadership by submitting at least 50 patents annually. In 2015, 57 new patents were submitted in major therapeutic areas (rosacea, acne, skin aging and psoriasis). Other key achievements in 2015 include the discovery of 850 new molecules, the enrolment of 10,000 subjects in 211 clinical trials in 20 countries and the registration of 377 products.

## French R&D site certified ISO 22301



Sophia-Antipolis, France - R&D site

In February 2016, the Galderma R&D center in Sophia-Antipolis, France, became one of the first sites in the world to be granted an AFNOR certification for business continuity management.

## Residency training worldwide



**Following Euroderm Excellence's decade of success,** Galderma's prestigious training programme for young residents was extended to Latin America and China.

## Community awards



Winners of the 2015 SkinPact awards

**Designed to help grow the dermatology community,** The Galderma SkinPact awards recognised four original dermatology projects in 2015, that aim to generate a positive impact in advancing sustainable innovation through Community Leadership and Continuing Education.





Medical  
solutions  
for the skin,  
our interface  
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The visual pattern depicted here is representative of the adapalene molecule, a Galderma medical skin management solution.

 GALDERMA