NIGERIA BRAND REPORT

– CONSUMERS OF HEADACHE TABLETS AND POWDERS –

COMPILED: NOVEMBER 2010

REPORT OVERVIEW

Compiled: November 2010
(75 pages)

This comprehensive report examines the Nigerian headache tablets/powders segment: historical market sales (past 5 years), sales forecasts until 2014, local consumer/market trends, competitor analysis of key brands in the segment, detailed consumer geo-demographic profiling, consumer lifestyle and media consumption.

The consumer analysis is based on the latest annual consumer survey among a nationally representative sample of more than 14,000 people – Nigeria Media Planning Services All Media and Products Survey.

<u>Some of the key questions the report will help you to answer are:</u>

- What are the historical market sales and forecasts for the next 5 years?
- Who are the key players and brands in the market and how are they positioned?
- What are the important consumer and market trends that should be included in your business strategy?
- Who are the users (and non users) of headache tablets/powders? e.g. age, gender, affluence, life-stage, geographics
- How do you engage with them? e.g. lifestyle, internet, sports, music interests
- What media do you use to communicate to them? e.g. TV, radio, newspapers, magazines

REPORT OVERVIEW

It provides a comprehensive consumer profile of the entire headache pills/powders segment (minimum category sample = 1862 consumers), as well as a detailed segmentation by brand, namely: **Alcamol, Barbimol (Jubel), Emzor, M&B Paracetamol, Novalgin, Panadol.**

It examines in detail the demographics, lifestyle, media consumption and cell phone and Internet usage of the headache pills/powders segment by brand, making it a vital reference report for anyone wanting to understand this segment of the market.

<u>Why purchase this market research report?</u>

- The report focuses on consumer-based intelligence – the most valuable brand asset
- Provides a comprehensive analysis of the "big picture" with local consumer/market trends
- Historical sales (past 5 years) and sales forecasts until 2014
- Includes a detailed competitor analysis and brand positioning
- 75 page report with 100+ charts, graphs, tables
- Salient points and key insights are highlighted and summarised in comment boxes on each page

SCREENSHOTS FROM REPORT

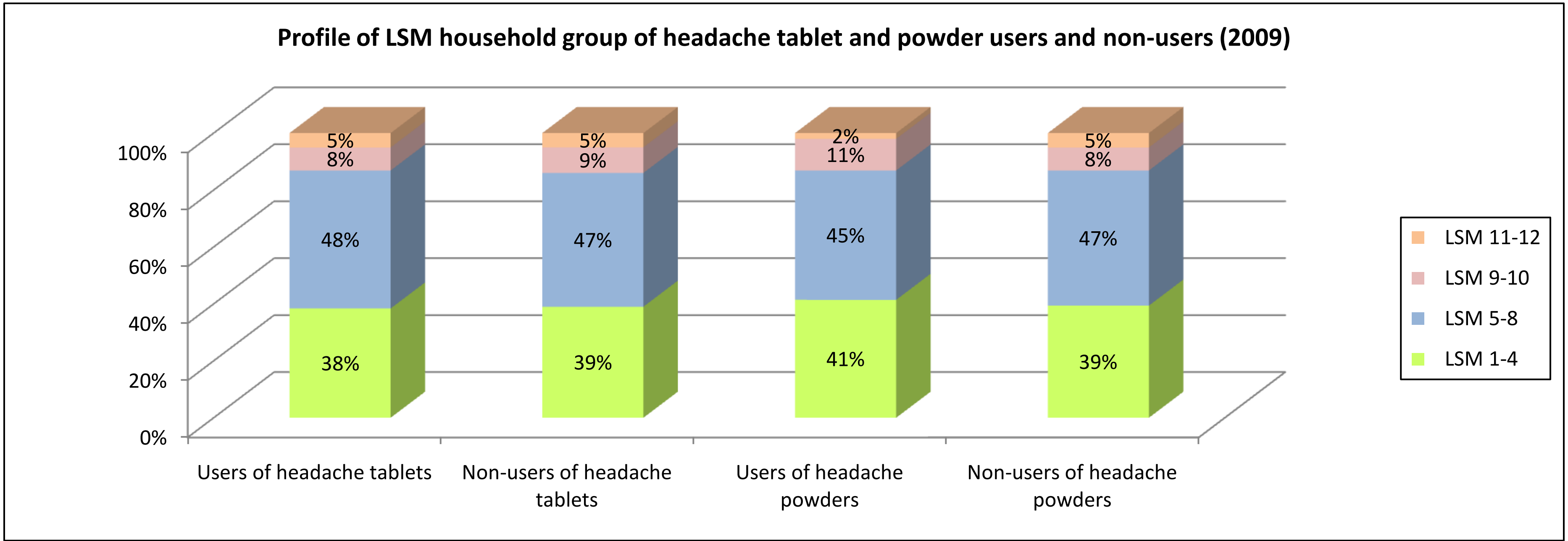
75 page report with 100+ charts, graphs, tables and insights

SAMPLE FROM REPORT:
NIGERIA AT A GLANCE

	NIGERIA	SOUTH AFRICA
Motto	"Peace and Unity, Strength and Progress"	*!ke e: ǀxarra ǁke* "Unity in diversity" (literally "Diverse people unite")
Area	923,768 km^2	1,219,080 km^2
Population 2010 (Est.)	161,726,000 (10th in the world)	49.99 million (25th in world)
Population (Census)	124,009,000 (2003)	44.8 million
Population growth	0.02 (60th in world)	0.28 (173rd in world)
Density	167/km^2 (71st in world)	39/km^2 (170th in world)
Life Expectancy (UN)	Male: 46 years; Female: 48 years	Male: 49 years; Female: 50 years
GDP (PPP)	$357.2 billion (2009 est.)	$505 billion (2009 est.)
GDP (official exchange rate)	$167.4 billion (2009 est.)	Rand (ZAR)
GDP - per capita (PPP)	$2,400 (2009 est.)	$287 billion (2009 est.)
GNI per capita (World Bank 2007)	$1,980	$10,243 (2009 est.)
Gini coefficient (inequality indicator)	43.7 (2003) (high inequality)	$5,823
Human Development	0.511 (medium)	57.8 (high inequality)
Currency	Naira (₦) (NGN)	0.683 (medium)
Exports (2009 est.)	$47.75 billion (46th in the world)	R372 billion (42nd in world)
Export commodities	petroleum and petroleum products (95%), cocoa, rubber	gold, diamonds, platinum, other metals and minerals, machinery and equipment
Export partners	US 35.08%, India 10.43%, Brazil 9.32%, Spain 7.19%, France 4.65% (2009)	China 10.6%, US 10.3%, Japan 9.2%, Germany 8.5%, UK 5.1%, India 4.2%, Netherlands 3.5%, Switzerland 3.3%, Zimbabwe 2.9%, Mozambique 2.7%
Imports (2009 est.)	$32.99 billion (54th in the world)	R387 billion (40th in world)
Import commodities	machinery, chemicals, transport equipment, manufactured goods, food and live animals	machinery and equipment, chemicals, petroleum products, scientific instruments, foodstuffs
Import partners:	China 14.89%, US 8.88%, Netherlands 8.18%, South Korea 5.46%, UK 4.63%, France 4.19% (2009)	China 13.9%, Germany 11.8%, US 7.1%, Japan 5.3%, Saudi Arabia 4.3%, Iran 3.8%, UK 3.8%, India 3.4%, France 3.1%, Angola 2.9%

Source: Unicef; Central Intelligence Agency (CIA);
Human Development Reports (UNDP);
Nations Encyclopaedia: Nigeria

SAMPLE FROM REPORT
LSM GROUP PROFILE



Frequency of users and non-users	Users of headache tablets	Non-users of headache tablets	Users of headache powders	Non-Users of headache powders
LSM 1-4	4 239 628	32 927 148	650 543	36 516 232
LSM 5-8	5 321 091	39 389 192	712 848	43 997 434
LSM 9-10	890 565	7 158 336	174 658	7 874 243
LSM 11-12	566 810	4 074 301	37 555	4 603 556

- In 2009, 86% of the headache tablet users were from LSM 1-8 households.
- 11% of headache powder users were living in LSM 9-10 households compared to 8% among headache tablet users.

Source: Nigeria Media Planning Services AMPS 2009; Total Population 7+ years old: 94 567 070 ; Sample size: 14 438 (Headache tablets in the past 4 weeks)
Note: Data Weighted to population

SAMPLE FROM REPORT
BRAND PROFILE: AGE

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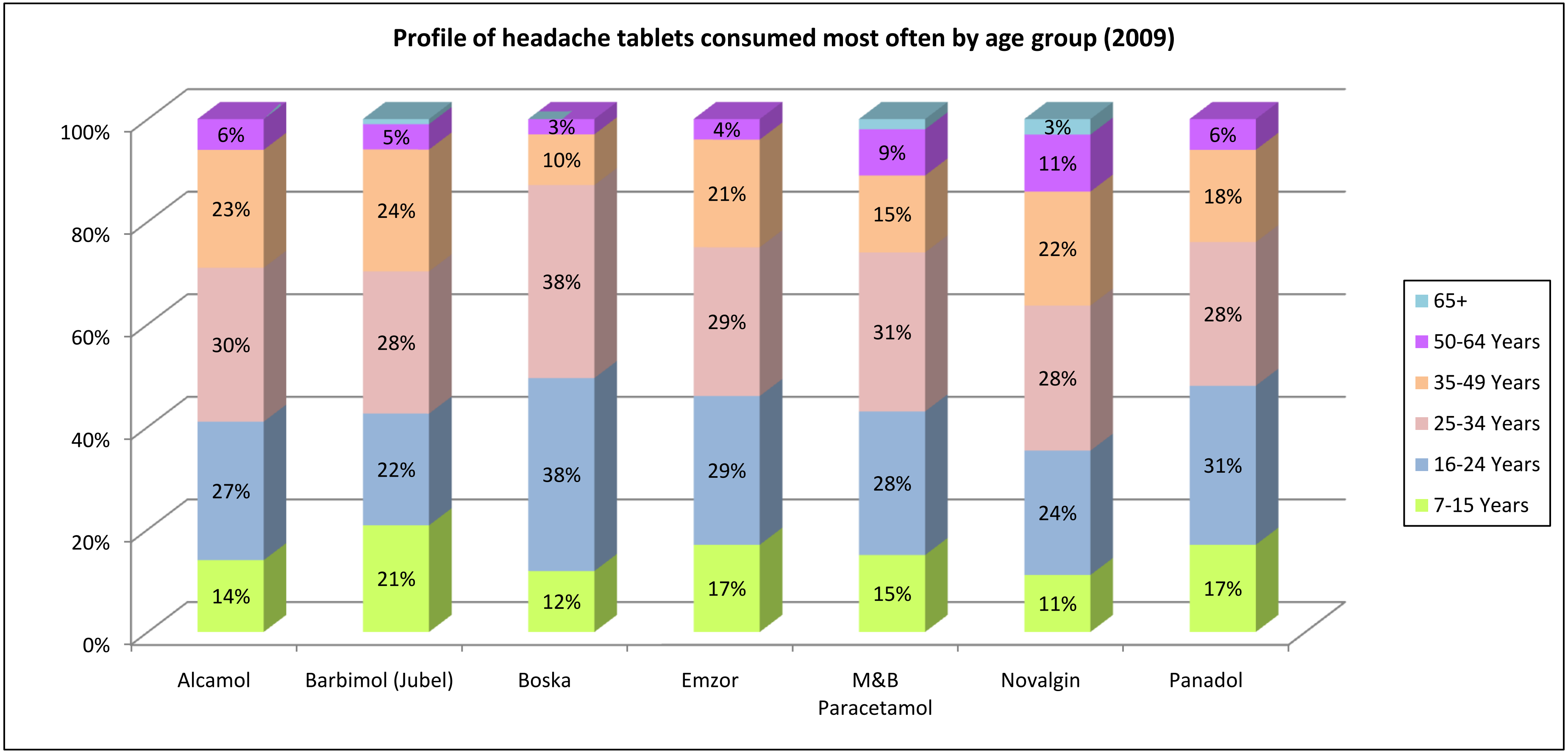

- In 2009, 38% of Boska consumers were aged 16-24 years, compared to 22% of Barbimol users.
- 11% of Novalgin users were 50-64 years age, compared to only 4% among Emzor users.

Source: Media Planning Services AMPS 2009;
Sample Size: 14 438 (Headache tablets consumed most often)
Note: Data based on respondent observation numbers

SAMPLE FROM REPORT
CELLULAR NETWORK PROVIDER

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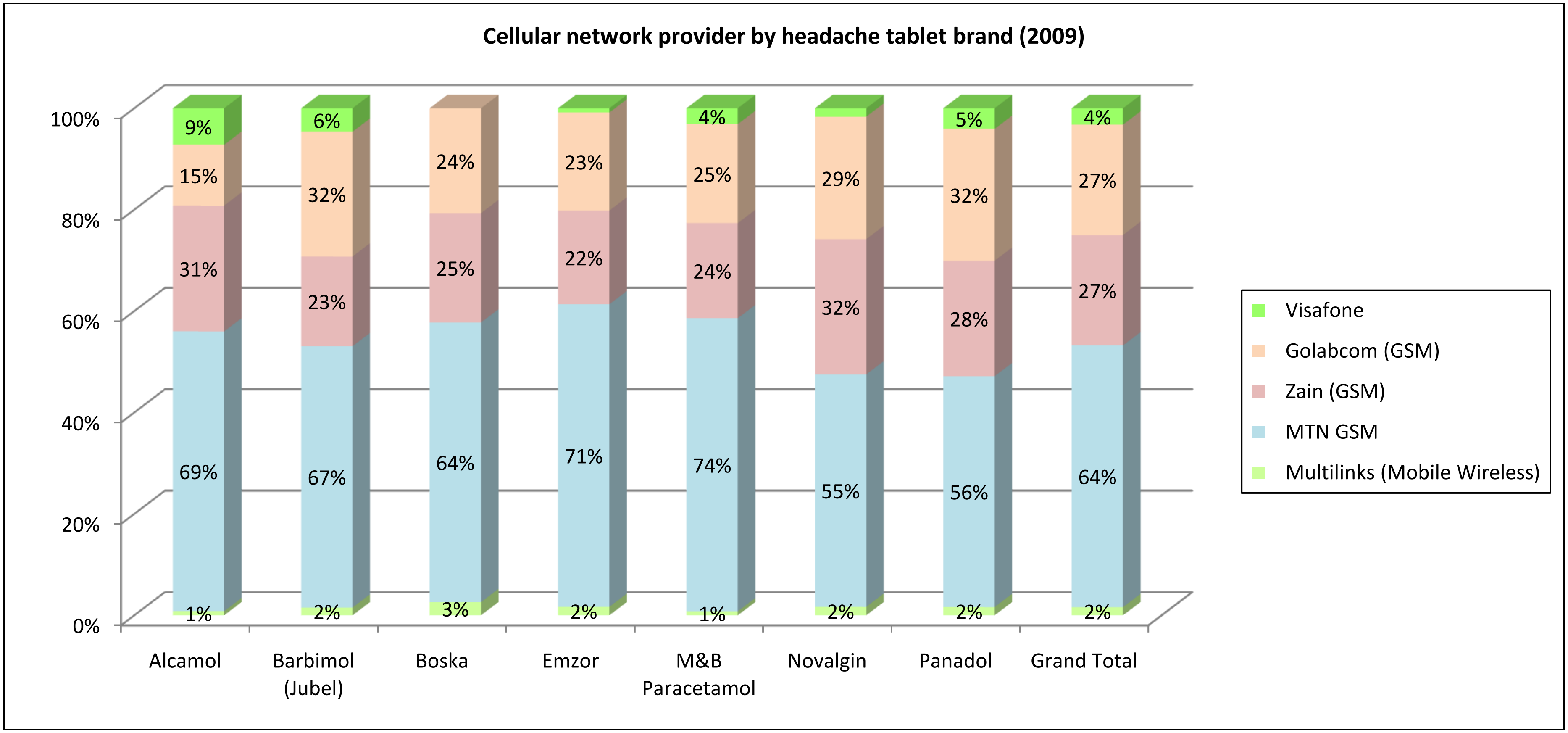

- Across all brands of headache tablets, MTN provided the highest percentage of users with cellular coverage.
- Among Novalgin users, 32% had cell phone coverage by Zain (GSM) compared to 23% of Barbimol users.

Source: Media Planning Services AMPS 2009;
Sample Size: 14 438 (Headache tablets consumed most often)
Note: Data based on respondent observation numbers

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- Our market research team is headed by a medical practitioner to ensure in-depth understanding and relevant insights are delivered
- We provide innovative market research solutions based on consumer-centric healthcare information and knowledge
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CONTACT DETAILS

CAPE TOWN		JOHANNESBURG	
Telephone:	+27 (0) 21 551 7066	**Telephone:**	+27 (0) 11 258 8731
Fax:	+27 (0) 86 671 2165	**Fax:**	+27 (0) 11 258 8511
Physical Address:	Unit B16 Century Square Heron Crescent Century City 7441 Cape Town Western Cape South Africa	**Physical Address:**	Country Club Estate Building 2 Woodlands Drive, Woodmead 2052 Johannesburg Gauteng South Africa

Website: **www.analytixbi.com**

Contact: **Dr. Sheena Mathew *(MB BCH, WITS)***
Email: sheena@analytixbi.com
Mobile: +27 (0) 82 941-9207

Dr. Sheena Mathew completed her MB BCH at the University of the Witwatersrand and has gained considerable experience in both the public and private sectors. She has done considerable work as a general practitioner in the private sector, while her time in the public sector focused mainly on paediatrics , HIV in paediatrics and rehabilitation. Her interest in natural healthcare led her to do a diploma in Ayurveda, in India. Her work experience also extends internationally, having worked at the Private Hospitals in the UK.

She is currently studying for a Masters in Public Health at the University of Cape Town and brings a wealth of knowledge to any market research and medical research projects in the healthcare industry.