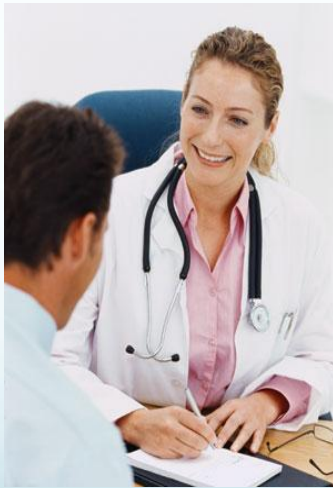


2009/2010 GEO-DEMOGRAPHIC ANALYSIS

PRIVATE HEALTHCARE PROVIDERS IN SOUTH AFRICA



COMPILED: JANUARY 2010



REPORT OVERVIEW

- Comprehensive overview and understanding of Healthcare Providers in South Africa based on the MEDpages database:
 - Private Medical Practitioners
 - Private Hospitals
 - Pharmaceutical Industry: Pharmaceutical Companies, Pharmacies and Distributors & Wholesalers

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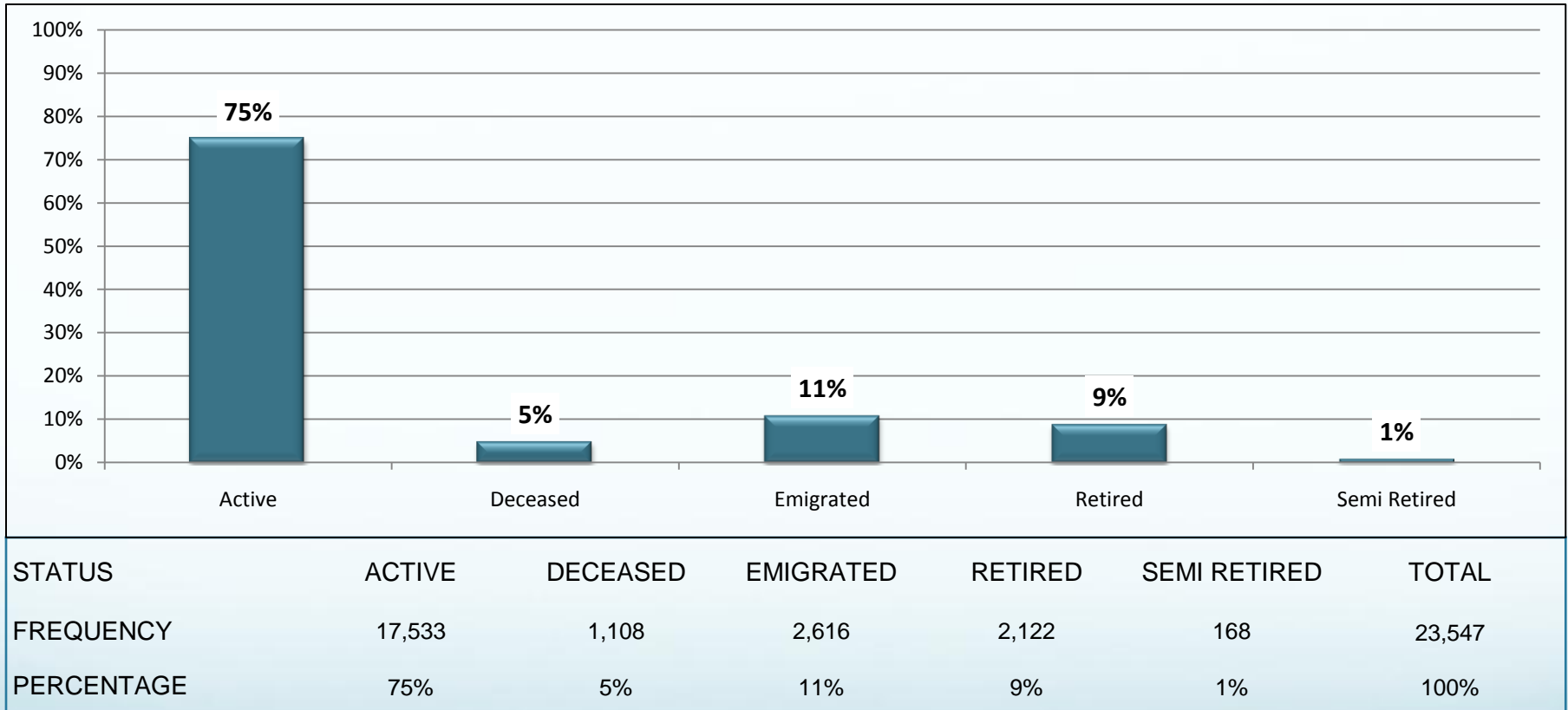
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SCREENSHOTS FROM REPORT



80 page report with 150 + charts, graphs, tables and insights

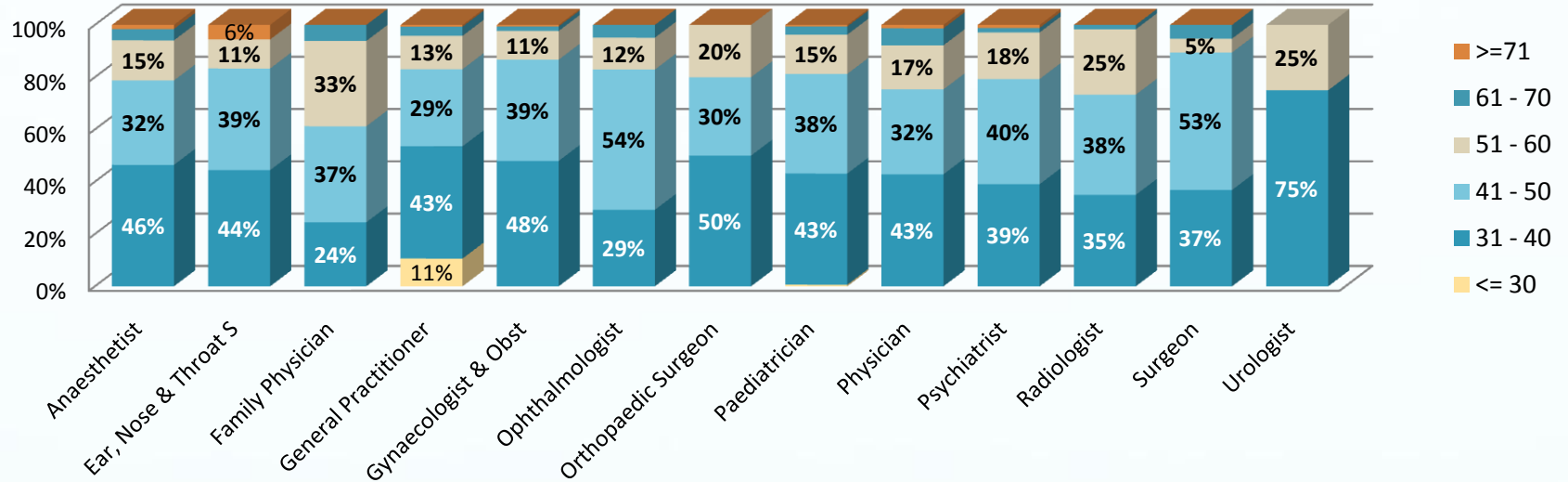
MEDICAL PRACTITIONER: CURRENT STATUS



- There are a total of 23,547 private Medical Practitioners on the MEDpages database
- 75% (17,533) of the MEDpages Medical Practitioners are classified as active, 11% have emigrated, 9% are retired, 5% are now deceased, & 1% are semi-retired

MEDICAL PRACTITIONER AGE PROFILE: FEMALE

Top 13 Medical Services



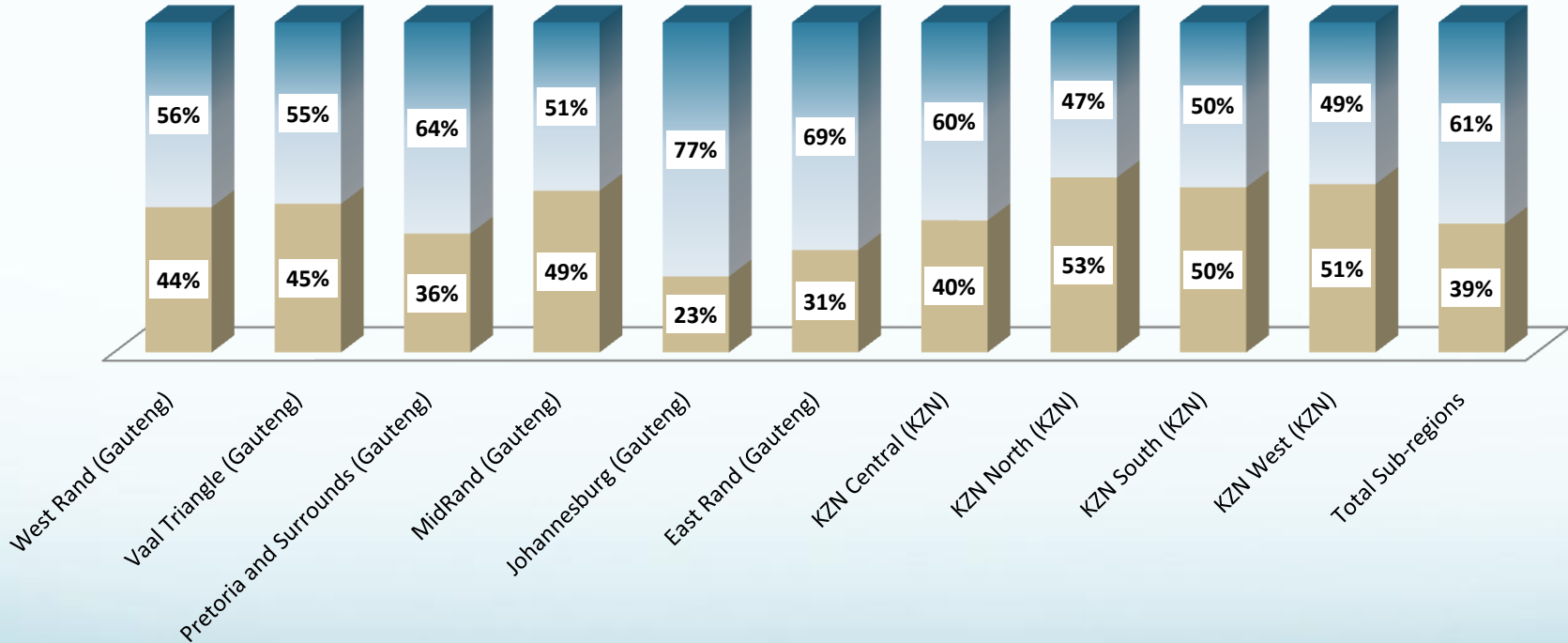
AGE	ANAESTH	ENT	FAMILY - PHYS	GP	GYNAE	OPHTHALM	ORTHOPOD	OPD- PAEDIATRIC	PHYSICIAN	PSYCHIATRIST	RADIOL	SURG	UROL	TOTAL MED SERVICE
<= 30	0	0	0	284	0	0	0	1	0	0	0	0	0	287
31 - 40	118	8	12	1,149	83	12	5	68	33	68	21	7	3	1,679
41 - 50	82	7	18	790	67	22	3	61	25	70	23	10	0	1,305
51 - 60	39	2	16	341	19	5	2	24	13	31	15	1	1	583
61 - 70	11	0	3	94	3	2	0	5	5	3	1	1	0	154
>= 71	4	1	0	22	1	0	0	1	1	2	0	0	0	36

- A quarter of the 17,533 Private Medical Practitioners are female, with a significant growth in female Medical Practitioners over the past 20 years - females now comprise 51% of Private Medical Practitioner under the age of 30 years
- 48% of female Gynaecologists & Obstetricians are under the age of 40 years compared to 29% of female Ophthalmologists

DISPENSING MEDICAL PRACTITIONERS vs. RETAIL PHARMACIES: SUBREGION

Gauteng & KwaZulu-Natal

■ Dispensing Medical Practitioners ■ Pharmaceutical Retailers

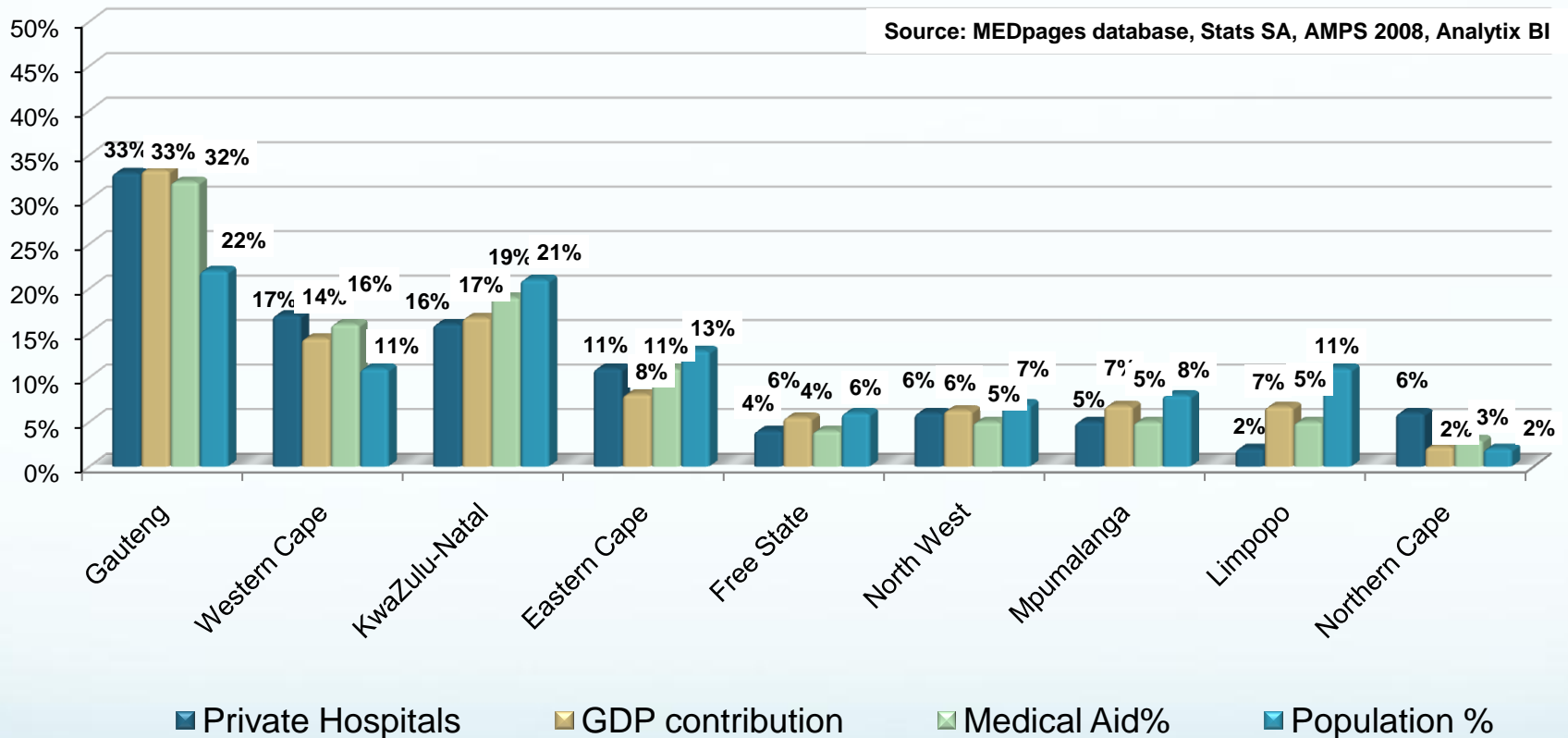


- In the Johannesburg Sub-Region, the proportion of retail pharmacies is 77% compared to 23% who are dispensing Medical Practitioners
- In the KwaZulu-Natal North Sub-Region, the proportion of retail pharmacies is 47% compared to 53% who are dispensing Medical Practitioners

*Subregion analysis ONLY includes analysis of Gauteng, KwaZulu -Natal

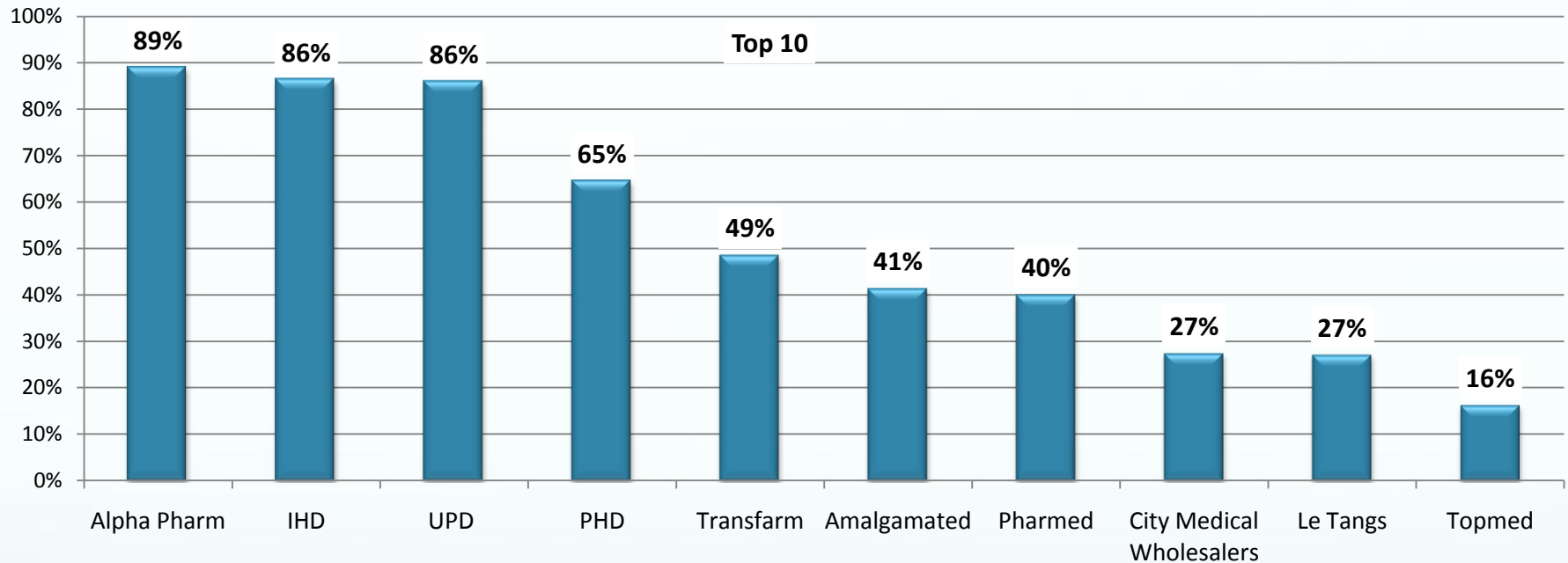
PRIVATE HOSPITALS: REGIONAL SUMMARY

Source: MEDpages database, Stats SA, AMPS 2008, Analytix BI



- There is a strong correlation between the provincial distribution of private hospitals, proportion of & people with medical aid & the contribution of the province to South African GDP
- There is potential opportunity to build more private hospitals in Limpopo as there is a significantly higher proportion of people with medical aid relative to the proportion of private hospitals in Limpopo

PHARMACEUTICAL DISTRIBUTORS & WHOLESALERS USED BY RETAIL PHARMACIES



WHOLESALER	ALPHA PHARM	IHD	UPD	PHD	TRANSFORM	AMALGAMATED	PHARMED	CITY MEDICAL WHOLESALERS	LE TANGS	TOPMED
FREQUENCY	2,524	2,452	2,438	1,833	1,378	1,174	1,136	778	770	463
PERCENTAGE	89%	86%	86%	65%	49%	41%	40%	27%	27%	16%

- Alpha Pharm supplies to 89% of the 2838 Retail Pharmacies compared to IHD who supply 86% of Retail Pharmacies
- Each Retail Pharmacy on average uses more than 6 Pharmaceutical Distributors & Wholesalers

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CONTACT DETAILS

MEDpages

- The Who, What & Where of healthcare is the definitive source of healthcare contact information in Southern Africa

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