



SOUTH AFRICA BRAND REPORT

– CONSUMERS OF VITAMINS & SUPPLEMENTS –



COMPILED: NOVEMBER 2010

REPORT OVERVIEW

**Compiled: November 2010
(82 pages)**

This comprehensive report examines the South African vitamin & supplement segment: historical market sales (past 5 years), sales forecasts until 2014, global and 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 20,000 people - All Media and Products Survey conducted by the South African Advertising Research Foundation.

Some of the key questions the report will help you to answer are:

- 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 vitamins and supplements? 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 vitamin & supplement segment (minimum category sample = 4893 consumers), as well as a detailed segmentation by brand, namely: **Berocca; Bioplus; Cal-C-Vita; Caltrate; Centrum; Natures Health; Spirulina; Supradyn; Turbovite; Vital.**

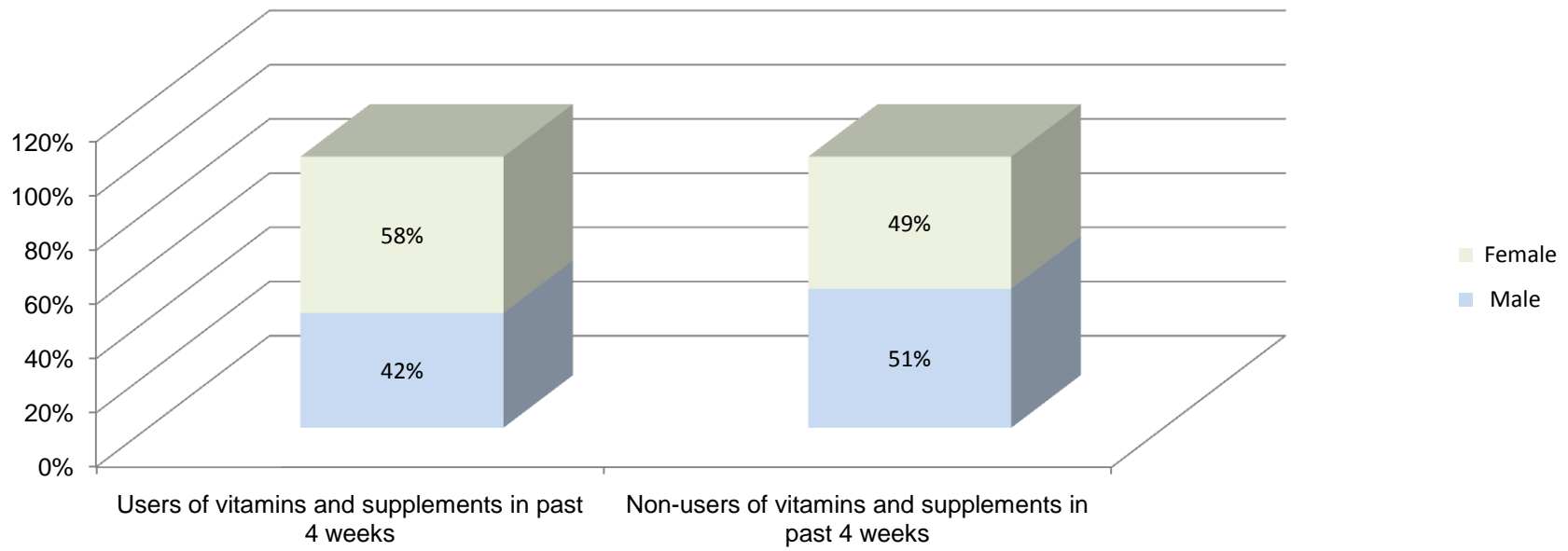
It examines in detail the demographics, lifestyle, media consumption and cell phone and Internet usage of the vitamin & supplement segment by brand, making it a vital reference report for anyone wanting to understand this segment of the market.

Why purchase this market research reports?

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

SAMPLE FROM REPORT: GENDER PROFILE

Gender profile of vitamins & supplements users and non-users

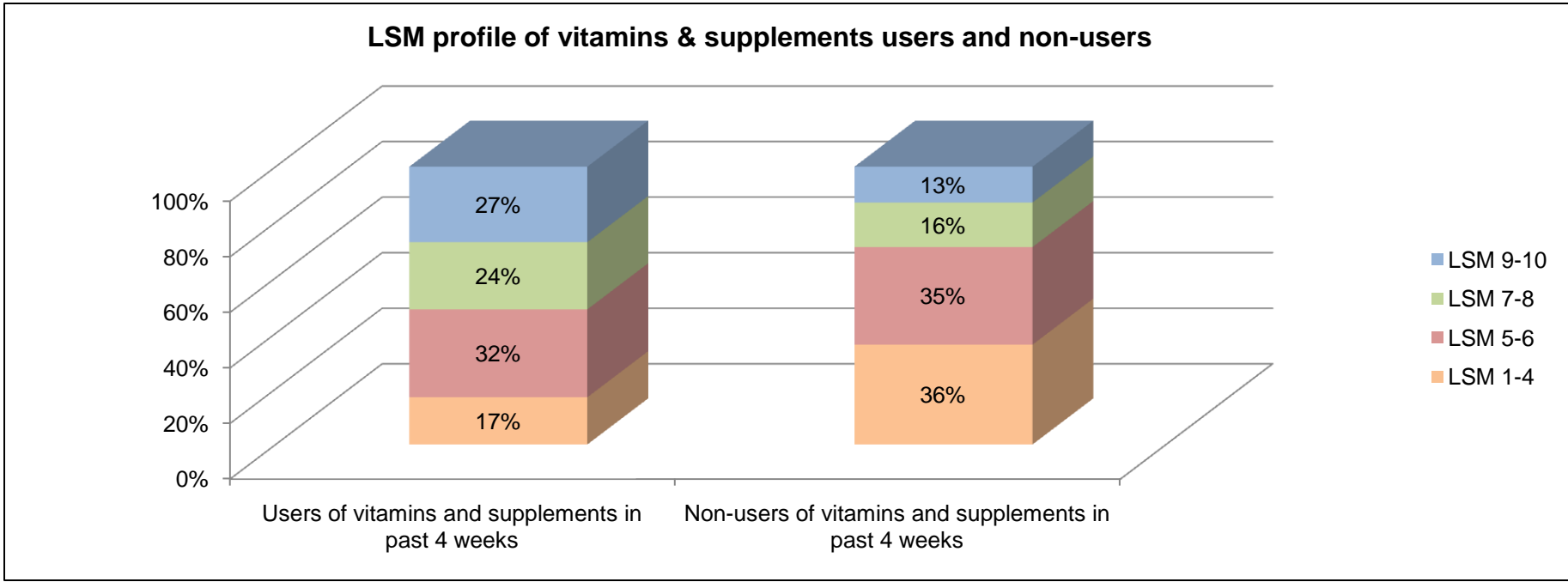


Frequency	Male	Female
Users of vitamins & supplements in past 4 weeks	2,139,217	2,914,773
Non-users of vitamins & supplements in past 4 weeks	14,066,758	13,377,315

- Female vitamins and supplements users outnumber male users by 16%.
- 58% of vitamin and supplement users are female, compared to 49% of non-users.

Source: AMPS 2009B
 Sample Sizes :4 893 (Users for vitamin & supplements past month)
 Note all figures based weighted numbers

SAMPLE FROM REPORT: USERS AND NON-USERS: LSM PROFILE



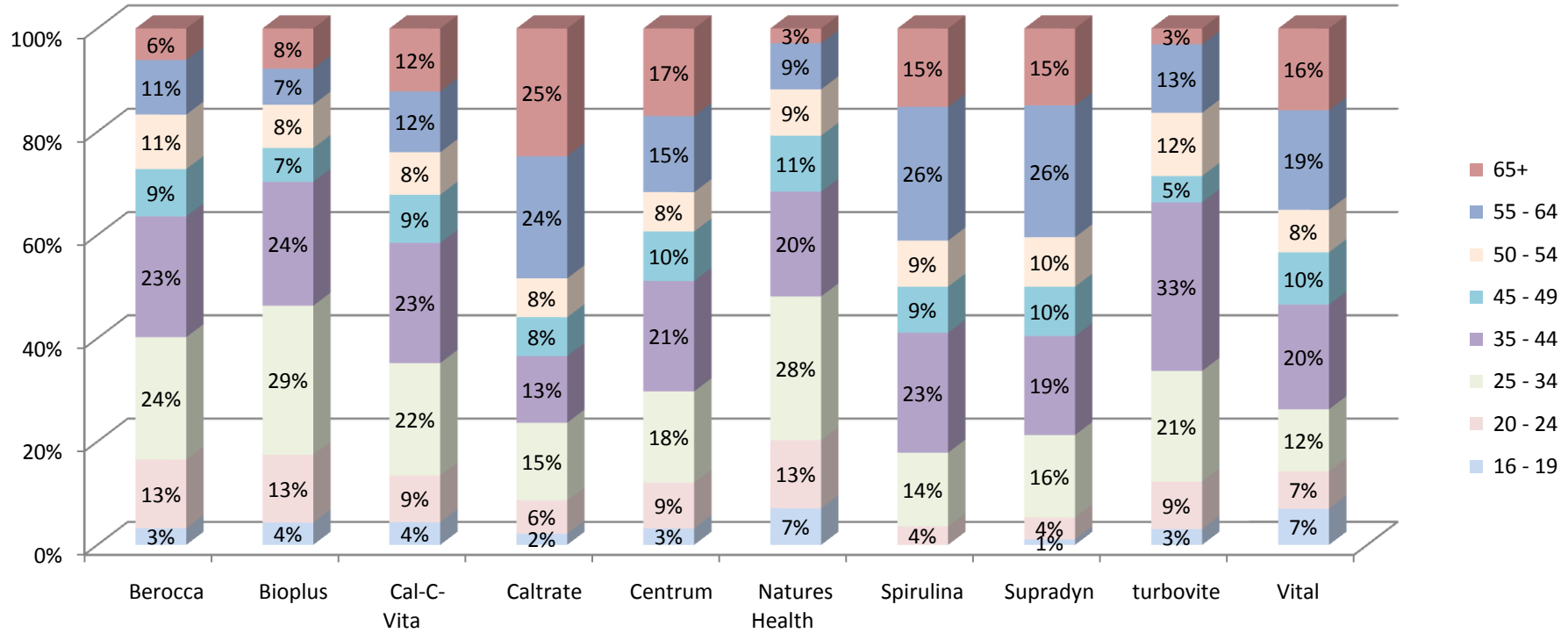
Frequency	LSM 1-4	LSM 5-6	LSM 7-8	LSM 9-10
Users of vitamins & supplements in past 4 weeks	858,433	1,599,289	1,222,417	1,373,852
Non-users of vitamins & supplements in past 4 weeks	9,859,927	9,639,680	4,407,847	3,536,619

- Although LSM 9-10 only comprise 12% of the adult population, they make up 27% of the vitamin users (over 1.3m people).
- 17% of the vitamins and supplements users are LSM 1-4, highlighting an opportunity as they make up 36% of the population.

Source: AMPS 2009B
 2009 Sample Sizes : 25 170 (total); 4,893 (Vitamins / Supplements bought in the past 4 weeks)
 Note: all figures based on weighted numbers

SAMPLE FROM REPORT: BRAND PROFILE: AGE

Profile of vitamin & supplements consumed most often by age group



- The majority of Caltrate (57%) and Supradyn consumers (51%) are over the age of 50 years, with the greatest percentage being the 55-64 age group.
- The age profile for Bioplus is significantly younger with 70% under the age of 45 years.

Source: AMPS 2009B
 2009 Sample Sizes : 25 170 (total); 4,893 (Vitamins / Supplements bought in the past 4 weeks)
 Note: all figures based on respondent numbers

SAMPLE FROM REPORT: TOP 3 RADIO STATIONS



Berocca	Percentage
Metro FM	25%
RSG	15%
5FM	14%

Bioplus	Percentage
Metro FM	23%
RSG	17%
5FM	15%

Caltrate	Percentage
RSG	23%
East Coast Radio (ECR)	14%
94.7 Highveld Stereo	13%

Cal-C-Vita	Percentage
Metro FM	17%
RSG	15%
94.2 Jacaranda / RMFM	13%

Centrum	Percentage
5FM	17%
RSG	17%
Metro FM	15%

Natures Health	Percentage
Lesedi FM	27%
Motsweding	22%
Umhlobo Wenene FM	20%

Turbovite	Percentage
RSG	19%
Metro FM	17%
East Coast Radio (ECR)	13%

Spirulina	Percentage
Metro FM	22%
RSG	19%
Umhlobo Wenene FM	13%

Supradyn	Percentage
RSG	30%
94.7 Highveld Stereo	19%
5FM	18%

Vital	Percentage
RSG	24%
5FM	15%
East Coast Radio (ECR)	13%

- The most popular radio station among Berocca users was Metro FM (25%) followed by RSG (15%) and 5FM (15%).
- For Natures Health, the popular radio stations were Lesedi FM (27%), Motsweding (22%) and Umhlobo Wenene FM (20%).

Source: AMPS 2009B
 2009 Sample Sizes : 25 170 (total); 4,893 (Vitamins / Supplements bought in the past 4 weeks)
 Note: all figures based on respondent numbers

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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.

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