

A Case Study

Winning in Anti-Malaria Segment **through Innovation**

The Case of **Amatem™**





The Big Question

Is there opportunity for new brands to win in **already saturated segment like antimalarials?**



Overview of Nigeria Anti-Malaria Segment

Highly competitive segment with established players beckoning the question of if it's possible to win as a new entrant?



306
Number of
Companies

540
Number of
Brands

704
Number
of SKUs

100
Molecules &
Strengths (INN)

7
Kind of
Formulations



About Elbe Pharma



ELBE PHARMA stands at the forefront of delivering high-caliber and cost-effective healthcare solutions accessible throughout Nigeria. Boasting a wealth of over twenty years' involvement in the pharmaceutical sector, the company has established itself as a renowned and relied-upon identity in households.

Therapeutic Segments

- Anti-Malarial
- Anti-Infectives
- Nutraceuticals
- Derma Range
- Anti-Inflammatory
- Anti-Hypertensive
- Anthelmintics
- Sexual Health
- Gastro-Intestinal/Ulcer

To Win in OTC Segment: Move from 'Product Orientation' to 'Patient/Consumer Orientation'



What products
should we sell?
What price? Trade
promo?



What are patients'
pain-points and what
do they want?



1. What do they **feel** about existing formulations?
2. What's the **experience** from swallowing tablets?
3. What experience do they **desire** to have?



Patient/Customer insights
well-executed
Always Wins!



The Winning Insight for the Adult Segment



Swallowing tablets leaves an ***unpalatable after-taste***. I wish there was an anti-malarial for adults that is ***easy to swallow without after-taste***.





Redefining the Patient/Customer Experience



Tablets



Softgel

HIT ON the core value proposition. Execute with precision across all media.

elbe
...be healthy

SAY NO TO MALARIA. YES TO LIFE.

AMATEM[®] SOFTGEL
ARTEMETHER/LUMEFANTRINE IN **SOFTGEL** CAPSULE

EASY TO SWALLOW
NO AFTER TASTE
RAPID RESPONSE

AMATEM FORTE
6 Soft Gelatin Capsules
6 Capsules de gélatine molle
(Artemether 80mg + Lumefantrine 480mg)
(Artemether lumefantrine)
"TOP THE TREATMENT OF MALARIA"

Correct Game Changer

PSN
LAGOS
ENDORSED
ACP

Learn more

And so, mitigate the **price war** to achieve **Price-Value Strategy**

Willingness to pay for
'malaria treatment
without the discomfort
of taste and swallowing'



**Reduced
perception of price**
from impact of benefit
of new experience.



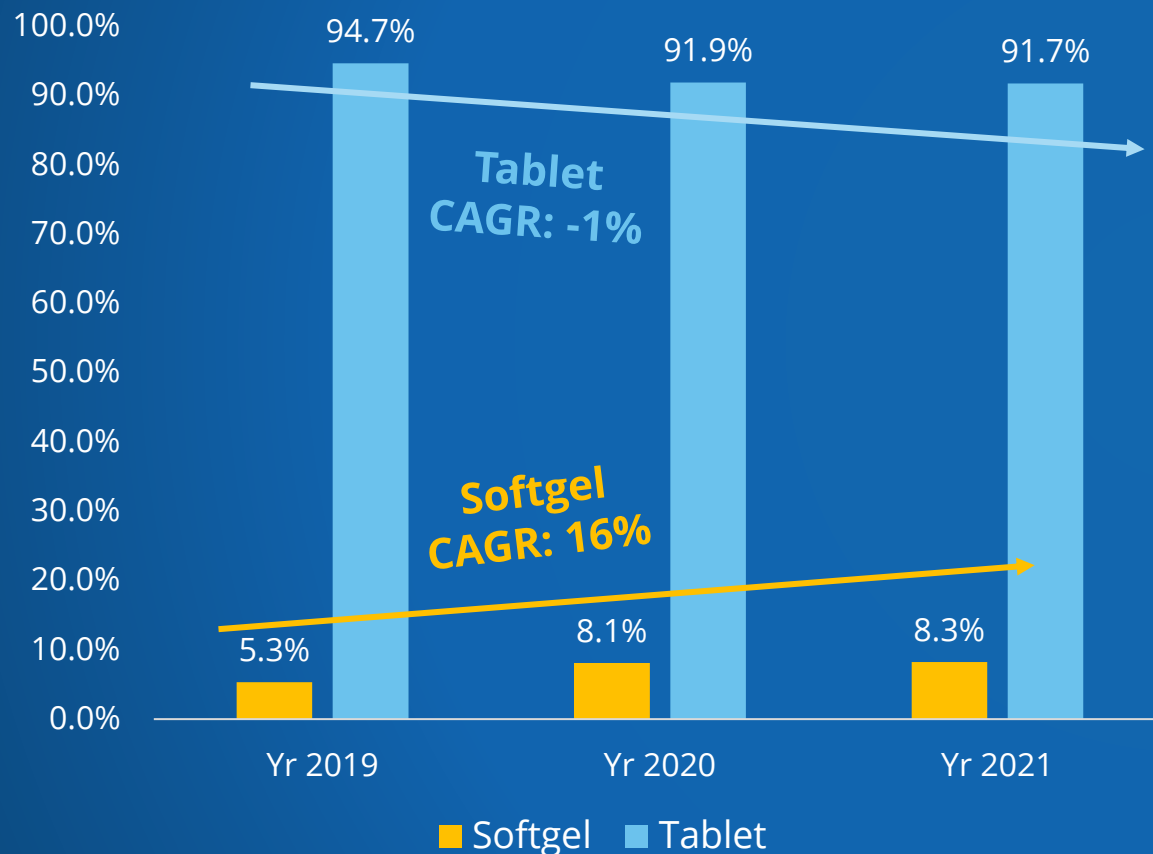
The Result? Predictable!



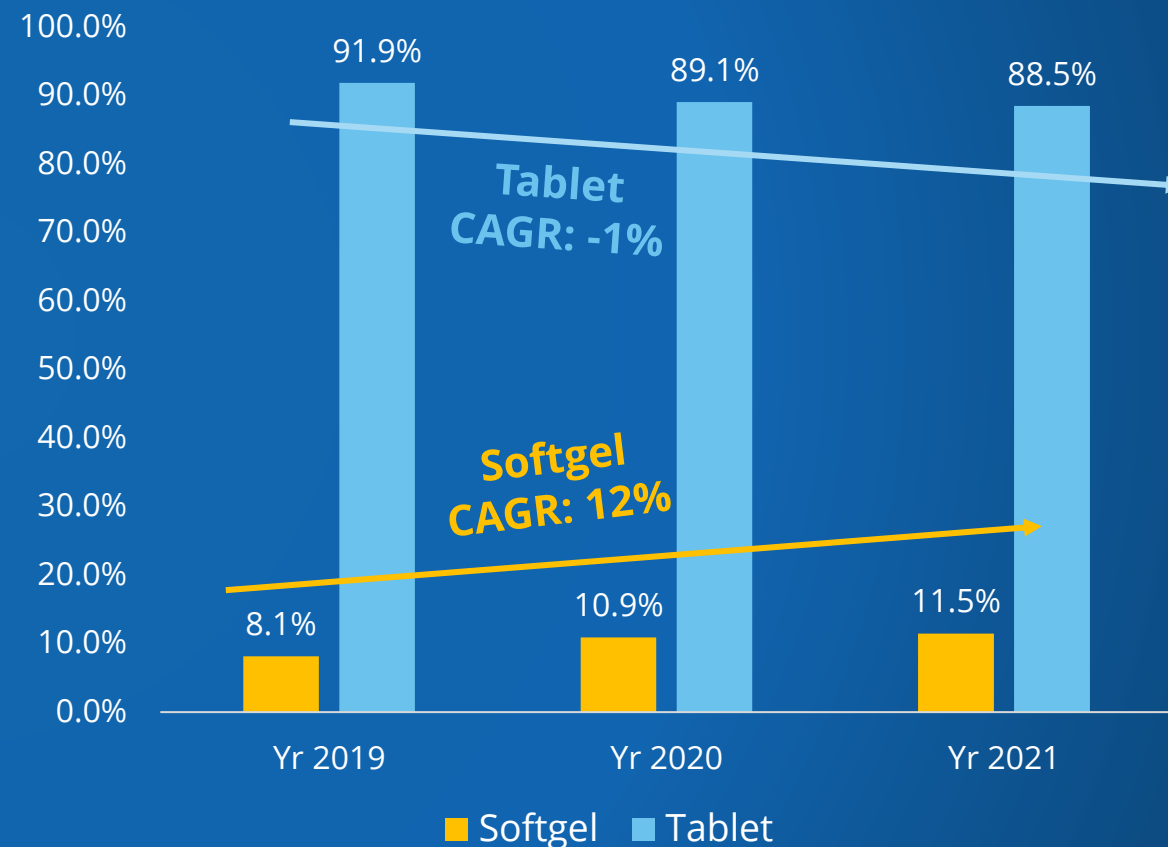
Simply...Softgel is winning!

....by winning with patients/consumers

% Softgel Volume Share Growth (2019-2021)



% Softgel Value Share Growth (2019-2021)



*Sales data from pharmacies in PBR VERSUS Data
16 States, 513 pharmacies. 250k+ packs

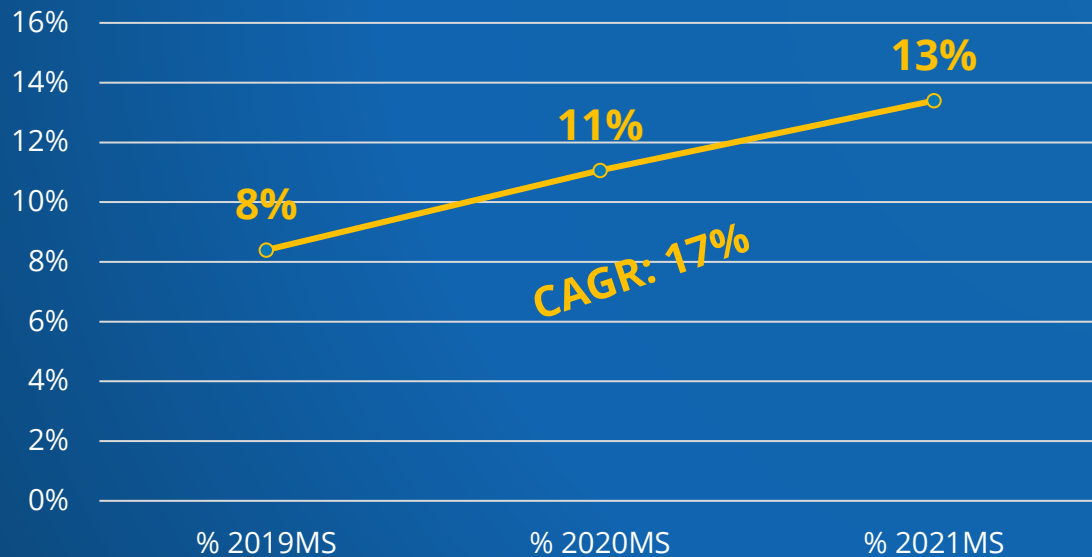
Simply...Innovation Wins!

*Sales data from pharmacies in PBR VERSUS Data
16 States, 250K transactions, 393 brands



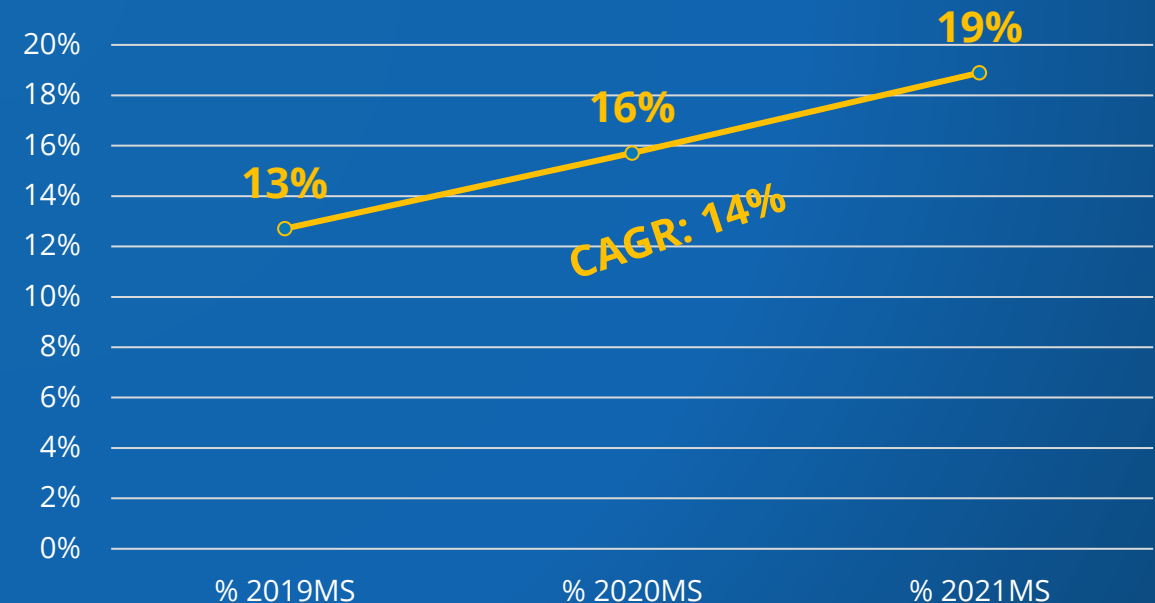
Amatem™ with 3-year aggregate % volume share of 11%, just behind the segment leader Lonart™ 15%

Amatem % Volume Share in Pharmacies



Amatem™ with 3-year aggregate % value share of 16%, just behind the segment leader Lonart™ 20%

Amatem % Value Share in Pharmacies



One Question Remains **Unsewered?**



What is/are the **pain-points** of the **children/paediatriac** segment?



About Our Company

Transforming healthcare through Real-world Data, Technology, and People.



Market Data

Our unprecedented real-world pharma market data provides deep insight for effective business planning and reviews.



Primary Market Research

We combine our market research, data science, medical, and marketing competencies to uncover insights.



Consulting

We leverage our knowledge of global best practices and strong insight to help you navigate the market across markets.



We leverage our proprietary real-world health data assets, technology, and cross functional team capabilities to transform the healthcare system in emerging markets, closing existing gaps of poor inclusion of underrepresented patients in clinical data and research.



PBR Life Sciences International

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London EC1V 2NX,
United Kingdom.



PBR Life Sciences Sub-Sahara Africa

70B Olorunlogbon Street,
Anthony Village, Lagos,
Nigeria.



Our Healthcare Channel Data to Help You



We help organizations utilize healthcare data for planning and improved operational effectiveness. Our rich and diverse data provides insight on all critical channels



Pharmacy Sales Data

Our pharmacy sell-out database comprises products, prices, and quantity sold from growing number of pharmacies.

VERSUS™ Platform & Data



Hospital Diagnosis & Treatment Trends

Our anonymized hospital data comprises diagnosis and treatment of patients for 300+ diseases

INVISIO™ Platform & Data



Medicine Import Data

More than 8 years of import data from more than 15 countries, 8000+ brands, 800 companies and more to help you plan

MarketSizer™ Platform & Data



Doctors & Pharmacists' Preferences

More than 2,000 doctors and insights provide on-the-ground insight on existing gaps in healthcare, unmet patient needs, & brand preferences.

SONUS™ Platform & Data



We help organizations make best decisions **with data**

Leveraging the power of data could help organizations make the right decisions that unlock immense value

01

Right Drugs for the Country

Identifying the right therapy area, product, and portfolio fit for the market

02

Right Pricing

Achieve the balance of right price and margin to be competitive

03

Right SKU & Forecast

Prioritizing the right SKU and eliminate under or overstocking

Right Investments

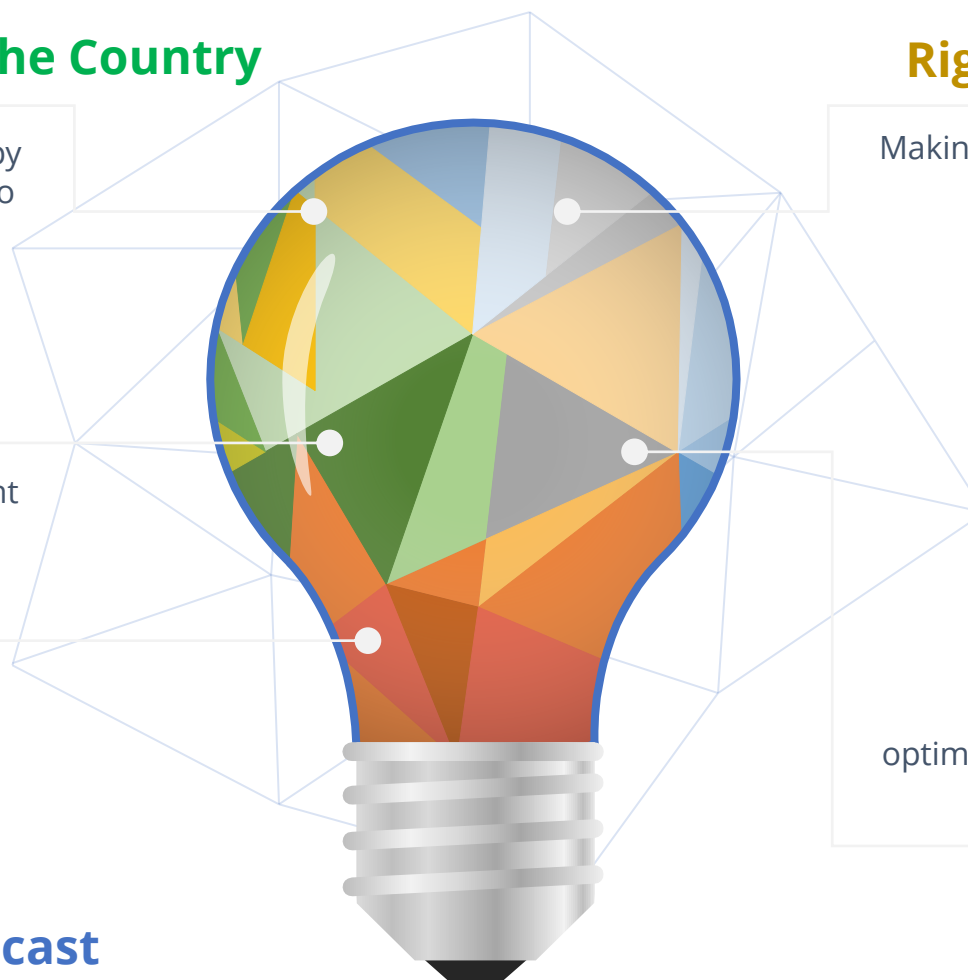
Making data-backed investment thesis for Africa

04

Utilizing data could help optimise KPIs that if monitored creates more value

05

The Right KPIs



Let's help you uncover insights in the market

Contact Us Today:

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Disclosure

PBR acknowledges and applauds the outstanding efforts of the Elbe Team without seeking any attribution. The content is disseminated solely for educational reasons, aiming to underscore the significance of gaining perspective and external evaluation of brand efficacy in crucial avenues. Details regarding Elbe Pharma are sourced exclusively from the company's official website and publicly accessible online information. All sales analysis obtained from PBR's proprietary data in VERSUS Database.

