



BRIEF ON ECO HEALTH LIMITED

Africa Investors Trip

March 2014

KEY REASONS TO INVEST IN AFRICA

By 2050....

- Africa's GDP is expected to go to USD 29 Trillion from USD 2 Trillion today
- Life expectancy will go up by 13 years. Every 3 years, life expectancy goes up by one year.
- Population will double to 2.4 billion

In the late 90s GDP growth was lower than population growth and now Africa is growing at 5%+ with population growth at around 2.25%. We have gone from "The Hopeless Continent" to "Africa Rising"

Go south, young man

World's ten fastest-growing economies*

Annual average GDP growth, %

2001-2010†		2011-2015‡	
Angola	11.1	China	9.5
China	10.5	India	8.2
Myanmar	10.3	Ethiopia	8.1
Nigeria	8.9	Mozambique	7.7
Ethiopia	8.4	Tanzania	7.2
Kazakhstan	8.2	Vietnam	7.2
Chad	7.9	Congo	7.0
Mozambique	7.9	Ghana	7.0
Cambodia	7.7	Zambia	6.9
Rwanda	7.6	Nigeria	6.8

*Excluding countries with less than 10m population and Iraq and Afghanistan

Sources:
The Economist; IMF

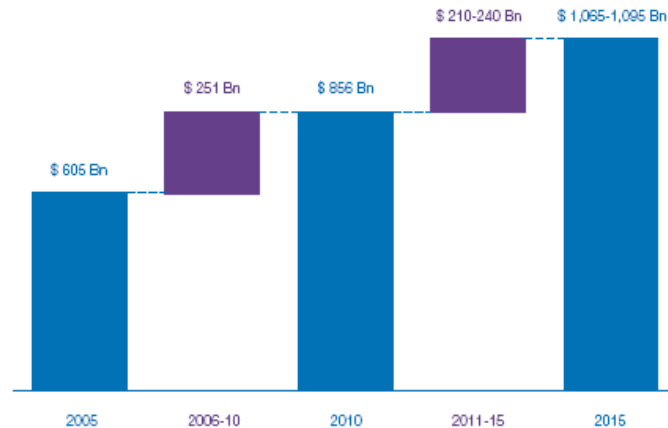
†2010 estimate ‡IMF forecast



TRENDS IN PHARMA INDUSTRY

PHARMERGING MARKETS & GENERICS GROWING

FIGURE 23 GLOBAL SPENDING ON MEDICINES



Notes: Spending in USD with variable exchange rates.
Compound annual growth rate (CAGR) in USD using constant exchange rates.

Source: IMS Institute for Healthcare Informatics, The Global Use of Medicines: Outlook Through 2015, May 2011, p. 4.

FIGURE 24 SPENDING BY GEOGRAPHY

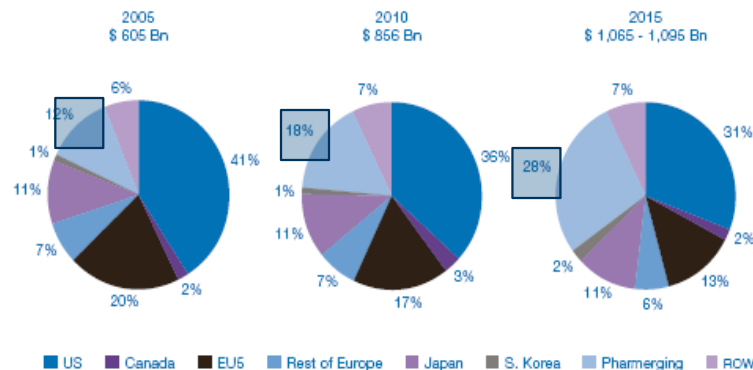
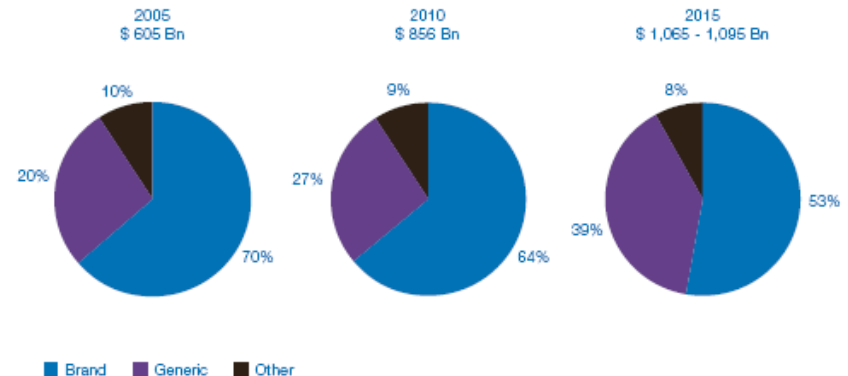


FIGURE 25 SPENDING BY SEGMENT



Notes: Spending in USD with variable exchange rates. Brand, Generic and Other segments defined by IMS's proprietary market segmentation methodology which covers 31 leading pharmaceutical markets globally. Estimated global generic spending includes estimates of unaudited markets and market segments. Estimates of Brand and Generic segments in other markets based on IMS Institute for Healthcare Informatics research. Brands include off-patent brands. Generics include branded generics. Other includes over the counter (OTC) and non-categorized products.

Source: IMS Institute for Healthcare Informatics, The Global Use of Medicines: Outlook Through 2015, May 2011.

GENERIC VERSUS BRANDED PHARMACEUTICAL PRODUCTS

Branded products accounted for nearly two thirds of global pharmaceutical spending in 2010. However, as patents expire in developed markets, that share is expected to decline. Spending on generic medicines is driving most of the growth in the leading emerging markets, which will contribute to the increase in the share of generic spending. The revenues from generics in 2015 are expected to reach USD 400-430 billion, 70% of which will be outside developed markets⁵⁸.

COMPANY HISTORY

The Chanrai Group; a legacy running for more than a century from the founders who sailed in from then undivided India to prospect for trade in shores far from home.

This pioneering spirit continues till date, the inheritance running across each and every corporate entity under its guardianship.

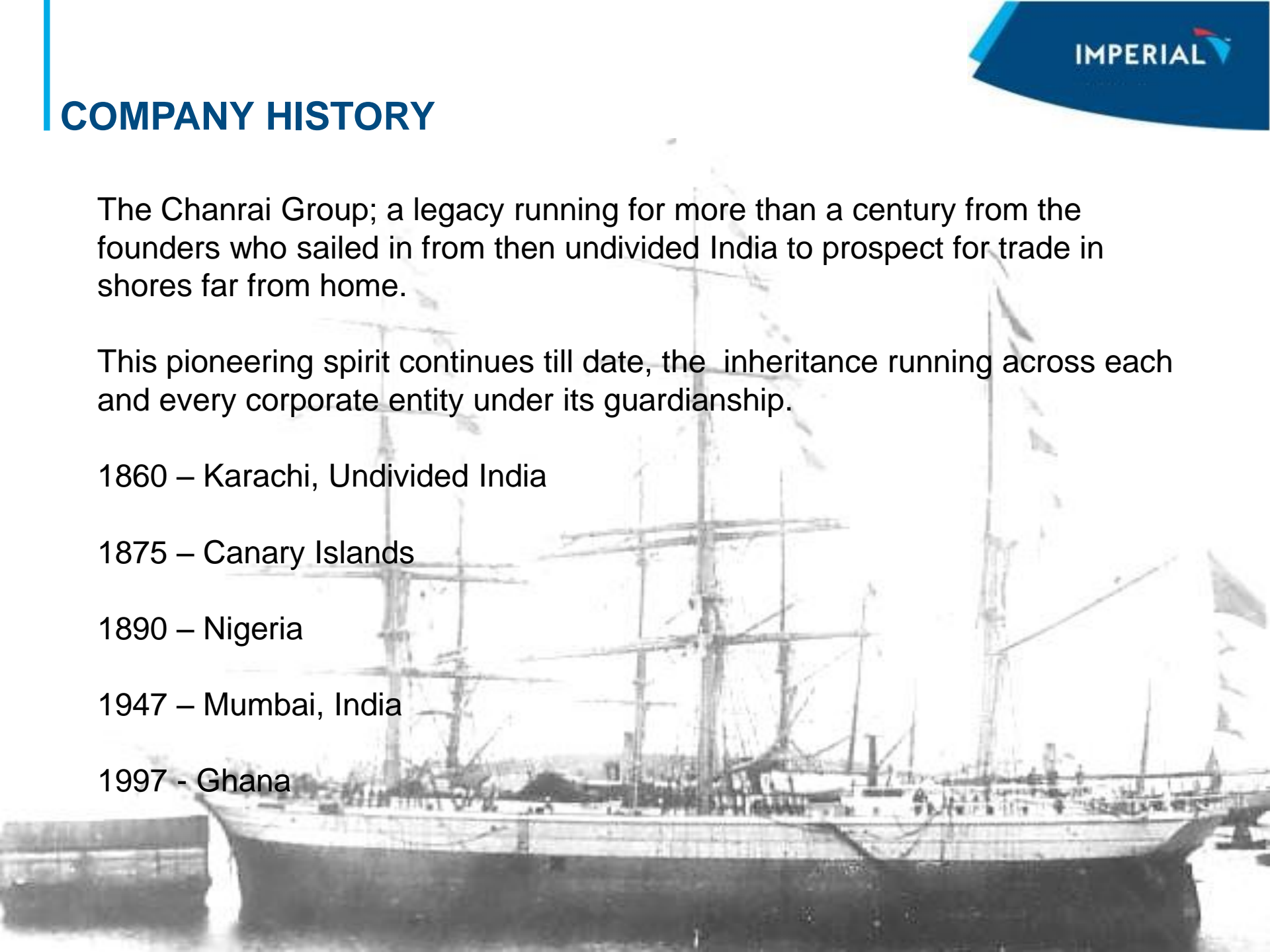
1860 – Karachi, Undivided India

1875 – Canary Islands

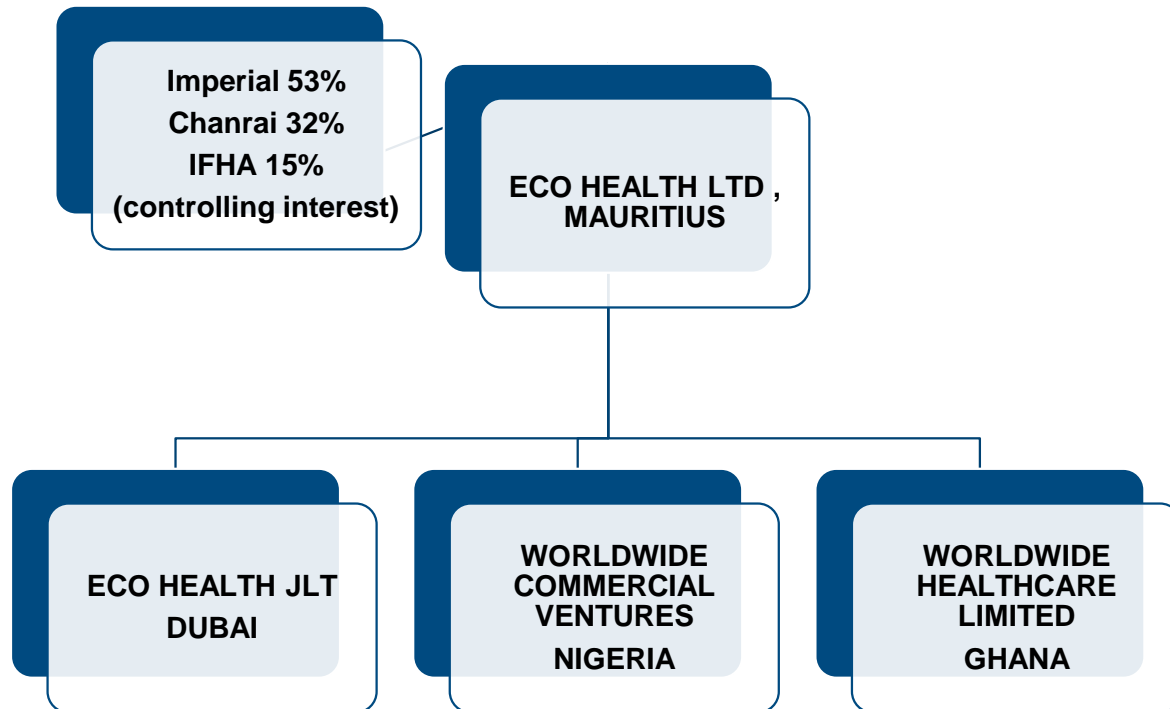
1890 – Nigeria

1947 – Mumbai, India

1997 - Ghana



CORPORATE STRUCTURE



VISION, MISSION AND VALUES



Forging partnerships built on trust and commitment...

VISION

To be the leading Supply Chain, Sales and Marketing Company of Healthcare Products & Services in Africa

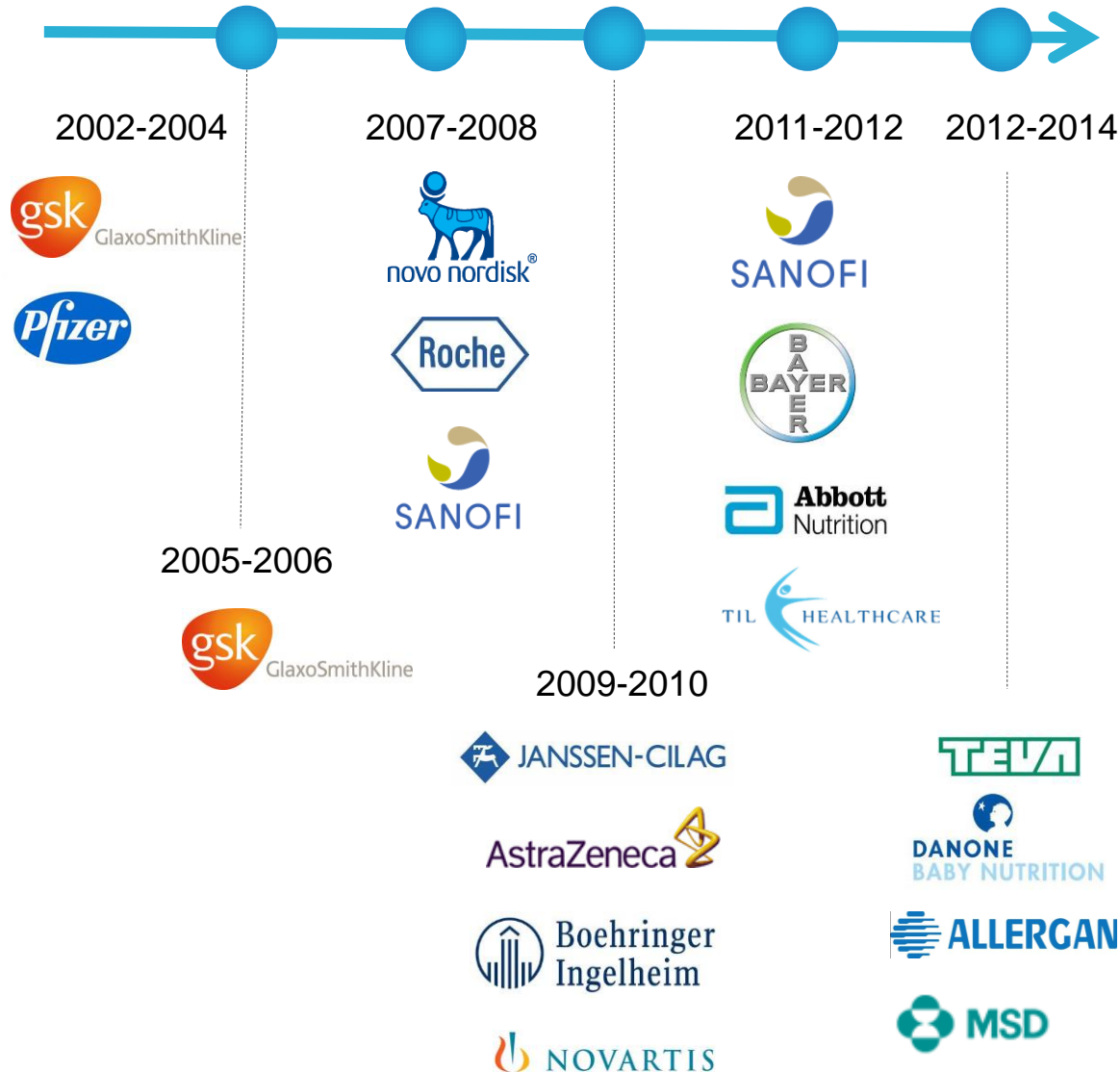
MISSION

To provide quality Healthcare Products & Services across Africa ensuring Affordability, Availability, Visibility and Accessibility within arm's reach of the Consumer.

VALUES

Think and plan long term
Always be fair to all concerned
Respect the laws of the land
Ensure a healthy and profitable business
Practice caring capitalism

KEY RELATIONSHIPS



PRODUCT PORTFOLIO & MARKET SIZE

Therapeutic Category	Market Share	Our Partners
	Nigeria	
	USD Millions	
Pain Management	106	Pfizer, Novartis,
Antimalaria	46	GSK, Pfizer, Novartis,
Gastrointestinal	9	GSK, Janssen, AZ,
Antibacterials	154	GSK, Roche, Sanofi, AZ,
Haematinics / Multivitamins	99	Bayer
Cardiovascular	26	GSK, Pfizer, Sanofi, AZ,
Antifungal	19	Pfizer, Janssen,
Antidiabetics	13	Sanofi, Novartis, Novo Nordisk,
Anthelmintics	16	GSK, Janssen,
Vaccines	5	GSK, Pfizer, Sanofi Pasteur,
Ophthalmology	5	Pfizer, Novartis, Allergan,
Psychosomatic	4	Roche, Janssen,
Oncology	11	Pfizer, Roche, AZ,
Cough Cold	48	Sanofi, Himalaya,
Rest	26	GSK, Pfizer, Roche, Sanofi, Novartis, Janssen, Himalaya,
Bronchodialator / Inhaler	11	GSK,
Total Market at Wholesale buying price or Distributor Selling price	598	

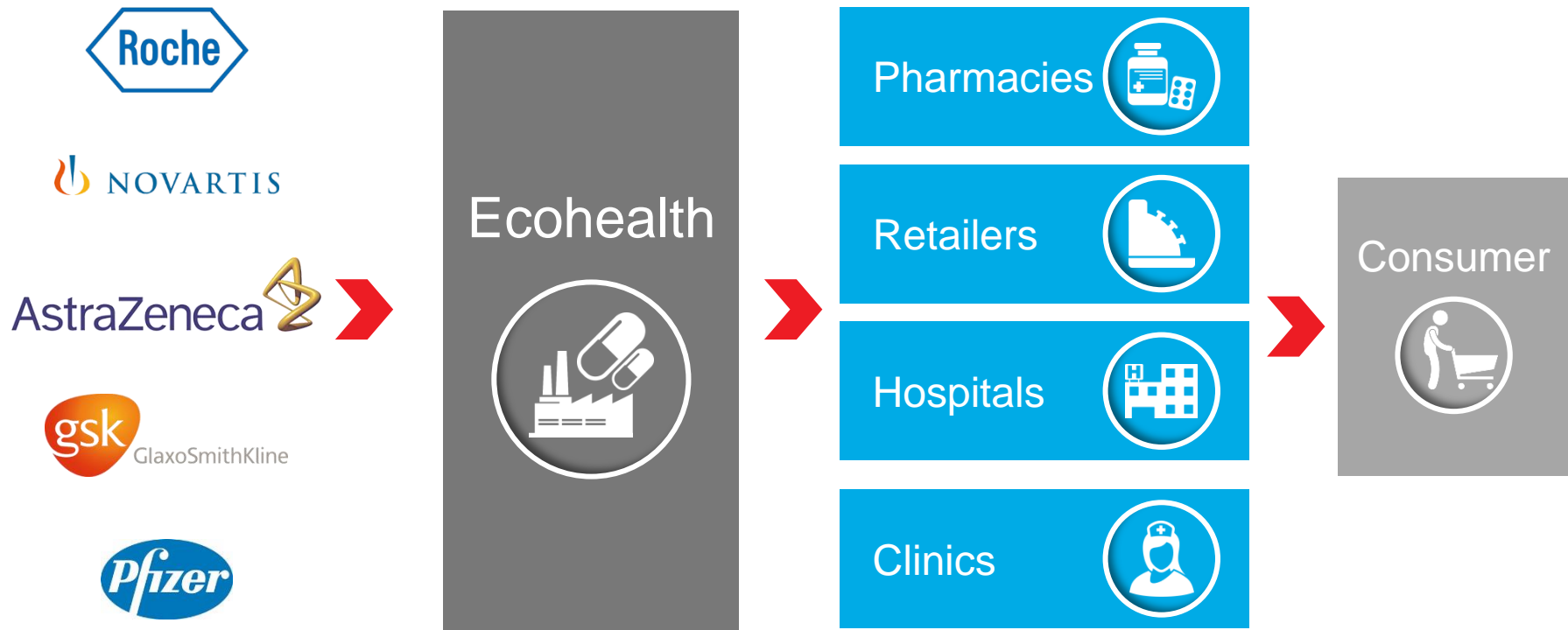
WORLD WIDE COMMERCIAL VENTURES LIMITED

- 10 branches
- 450 staff
- 230 Sales Officers
- 50 AM's
- 15 RM's / ZM's
- 10 Senior Managers
- 145 Staff in Key Departments (IT, HR, Regulatory, QA, Logistics, Finance)

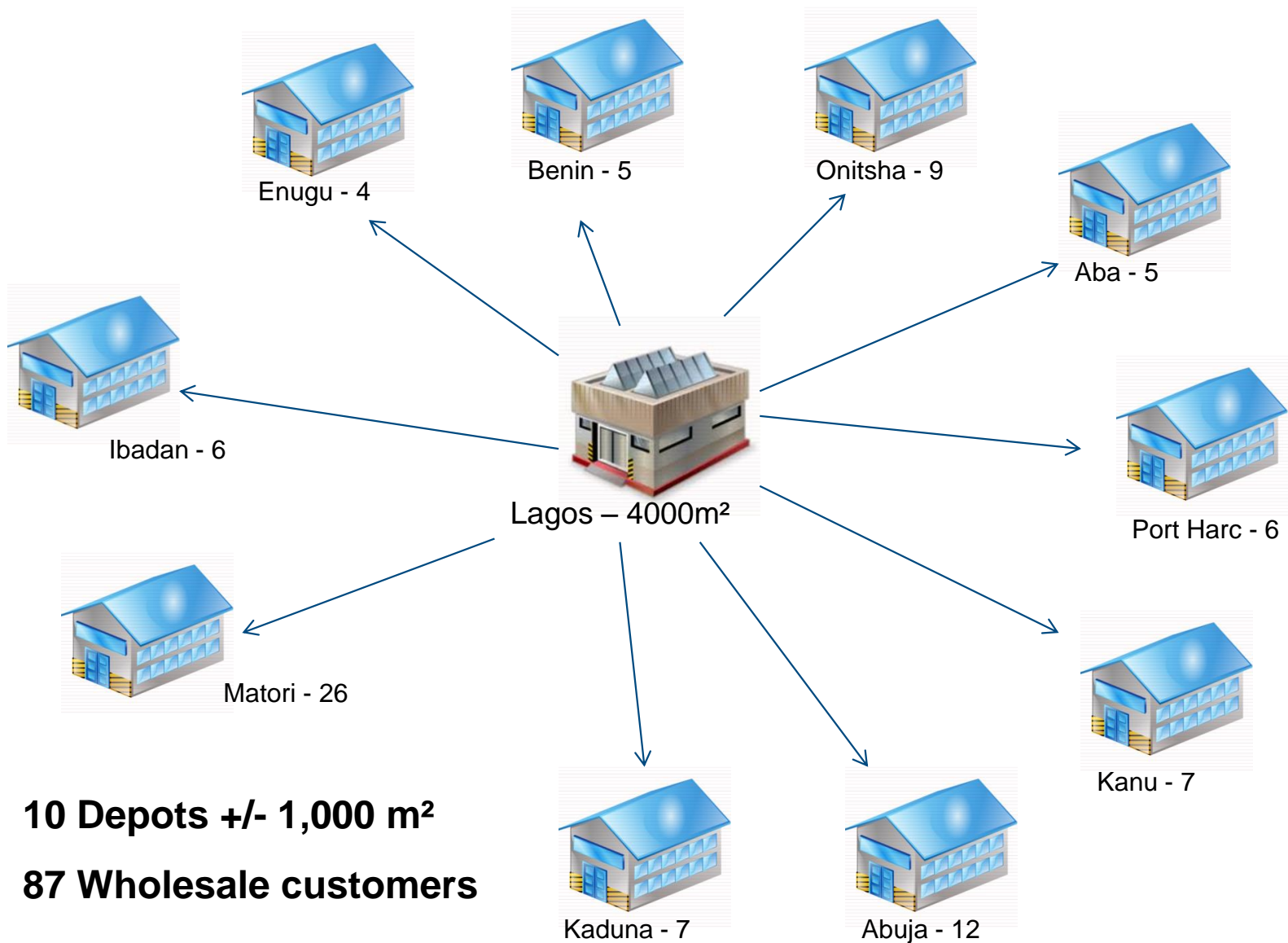
- **Services Offered**
- Importation
- Sales/Distribution
- Warehousing
- Marketing Services
- Regulatory Support
- Employee Hosting
- Merchandising



ECOHEALTH VALUE ADDITION



WHOLESALE & DEPOTS



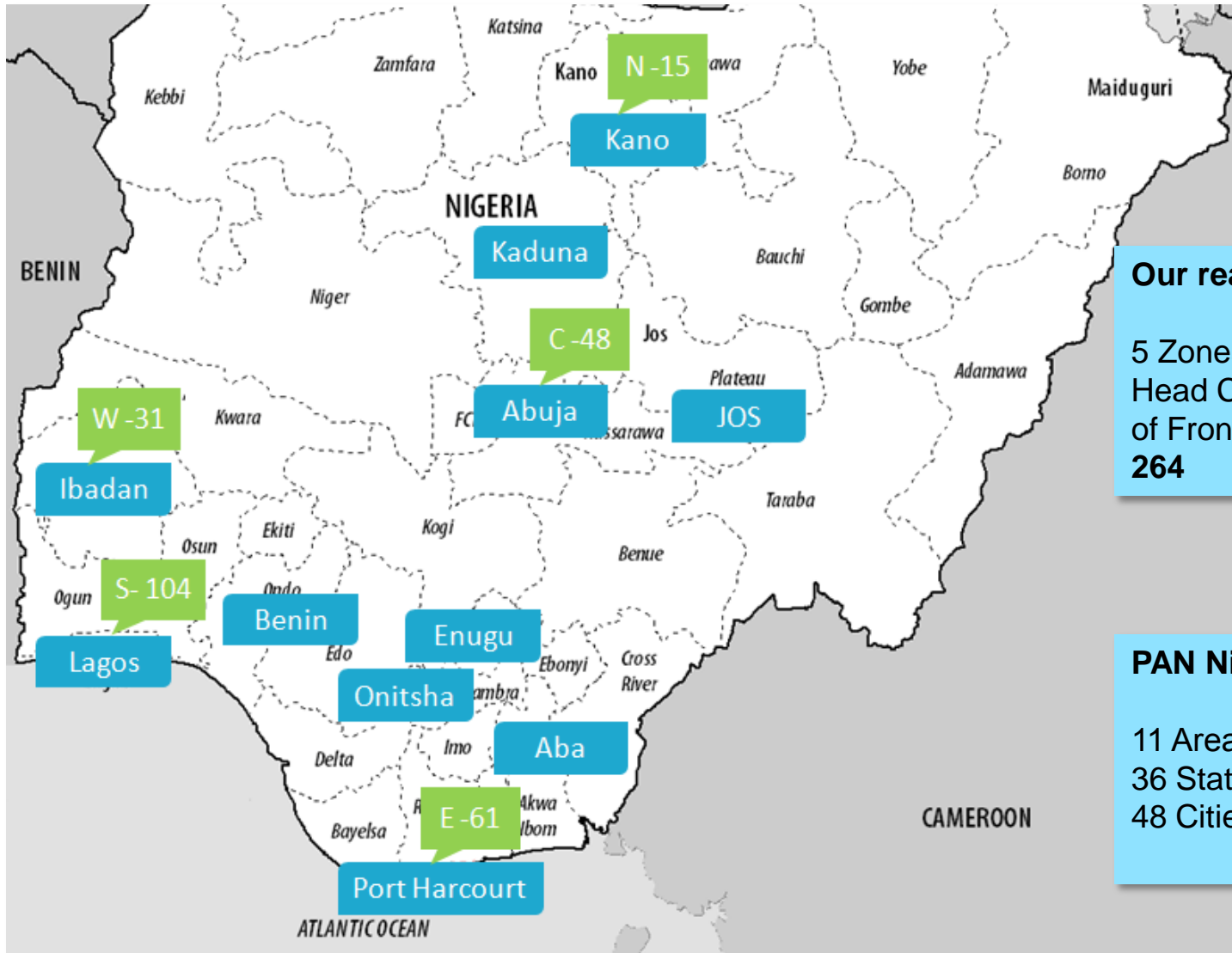
10 Depots +/- 1,000 m²

87 Wholesale customers

WWCVL COVERAGE

- 2,300 pharmacies covered directly or indirectly through SOs.
- Another 30,000 retail outlets (Unregistered Pharmacies & PMVs) covered by wholesale.
- 800 Hospitals & 200 clinics covered directly and another 1000 indirectly through our SOs.
- The FMOH data shows the universe shown as 4,201 Hospitals - with nearly 50% of them dysfunctional.

GEOGRAPHICAL/ REGIONAL COVERAGE



Our reach

5 Zones
Head Count
of Front Line Sales Staff is
264

PAN Nigeria coverage

11 Area Managers' HQs
36 States plus FCT
48 Cities and Towns

WAREHOUSE & OFFICES



COLD STORAGE



PEOPLE & STRUCTURE

PEOPLE	STRUCTURE
Strong professional team	Firewalled <ul style="list-style-type: none"> • MNCs' confidentiality is protected • Helps achieve objectives whilst maintaining ethical norms
Senior team with rich experience from pharmerging markets and from MNCs we represent	Exclusivity of major partners
Senior team has been through similar market evolution	Tailor-made to suit the needs of the MNC
Knowledge transfer through regular training	Overseas logistics , finance and business development support from Dubai
Talent retention and superior employee engagement.	Outsourced IT services and support from India
Multicultural blend of various tribes of Nigeria & Ghana in our team helps tackle the local markets appropriately	Information systems based on Oracle r12

COMMERCIAL, FINANCE & CUSTOMER

COMMERCIAL & FINANCE	CUSTOMER
Good control on account receivables and Good Credit Management – leading to a low bad debt ratio – a challenge in Nigeria & Ghana for others	Customer Help Desk
Collective bargaining powers with the trade	Customer-centric approach
System driven monitoring of expiries	Unique handling of cold-chain products
Sufficient working capital lines , both in local currency and hard currency	Group experience of over 10 decades
Tested exchange risk management and support	Direct to Patient for Oncology products
	Long term thinking & long term partnerships

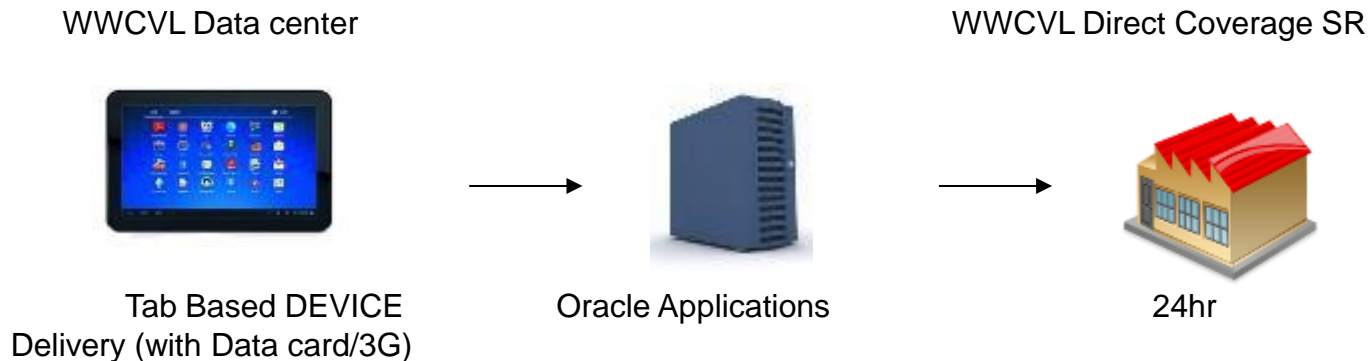
REDISTRIBUTION & THE SUPPLY CHAIN

REDISTRIBUTION	SUPPLY CHAIN
80% of Registered Pharmacies	Inventory Management Perpetual availability of all products across all channels at all times
Coverage of all the important Federal & State Government Hospitals	Low reaction time Quick in responding to market needs
Sales to all leading Private Hospitals & Clinics	Warehousing To MNCs' exacting standards
Adequate indirect coverage of Patent Medicine Vendors for OTC range	
Over 250 Retail Redistribution field personnel supporting this task	

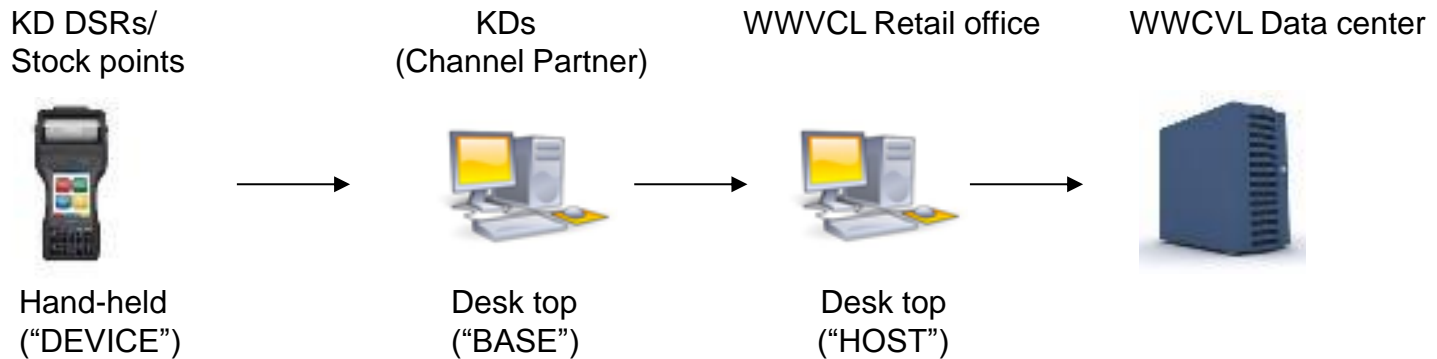
SYSTEMS & MANPOWER


Modern IT System	Trained Manpower
Electronic order collection system	Accredited Pharmacists In-Charge
Immediate Invoicing	Experienced Back Office Staff support
Batch Tracking	Regular Training to update skills
Real Time Visibility	Customer Friendly environment
Efficient Storage & Logistics Reduced Delivery Time	


SFA – Cutting Edge Technology




Key Distributors Team (Future)








ANTHONY CHIEDU OKAFOR


Utilities



 Check-out






LAGOS - WWCYL
ABBOTT
USHIEAGU, Mr. EMEKA



Customer Account # : 9982
Name : Venty Limited (ABOTT)

 Back
 Enter Order
 Cancel
  Save

Date : 04-03-2014 Order No : WWCYL1110A201 Total line : 2 Value (Round Off) : ₦ 8,650,000.00

Special Instructions **Urgent Delivery**  Clear

Product Code	Product Description	Price	Quantity	Value	Request Date
^	^				04-03-2014 
FDABBFIS01	Isomil 400g	34,500.00	100	3,450,000.00	04-03-2014  
FDABBFIS01	Similac 450gm	26,000.00	200	5,200,000.00	04-03-2014  

04-Mar-2014 14:42:10 

HOW DOES IT BENEFIT OUR PARTNERS

VALUE ADDITIONS - IMMEDIATE	LONG TERM GAINS
Authentic products with total quality maintained.	Capacity Building of our Partners with Regular Training on 'Regulatory Aspects', Systems and Total Quality Management
Consistent availability without 'flood' and 'famine' situations	Getting to the next level and attracting new Companies to enter into Nigeria to improve scale of operations
Assured delivery within agreed time	
Advanced order booking systems with visibility on available stock	

BUSINESS INTEGRITY & COMPLIANCE

- WWCVL signs annual 'Compliance Sheets' of partner MNCs for adherence to US FCPA & UK ABAC.
- Regular training in this sphere by MNCs of our Officers & Staff cascades down to grass-root level of our employees.
- WWCVL steers clear and avoids any dealing with unregistered retailers and suspect customers from all channels.

ECO HEALTH – OTHER BENEFITS

- **MIS**

Monthly updating of MIS covering primary sales to all customers PAN Nigeria by branch by SKU. This will be available through Data Orbis

- **Transparency**

Complete transparency at all levels

- **Ordering**

Monthly/Quarterly/Annual Plans

Regular orders based on stock and sales norms agreed

- **Parastatals**

Excellent relationship with NAFDAC/ FDA/SON/Immigration/Customs/Ministry of Finance to ensure smooth flow of documents related to import, clearing and registration of products.

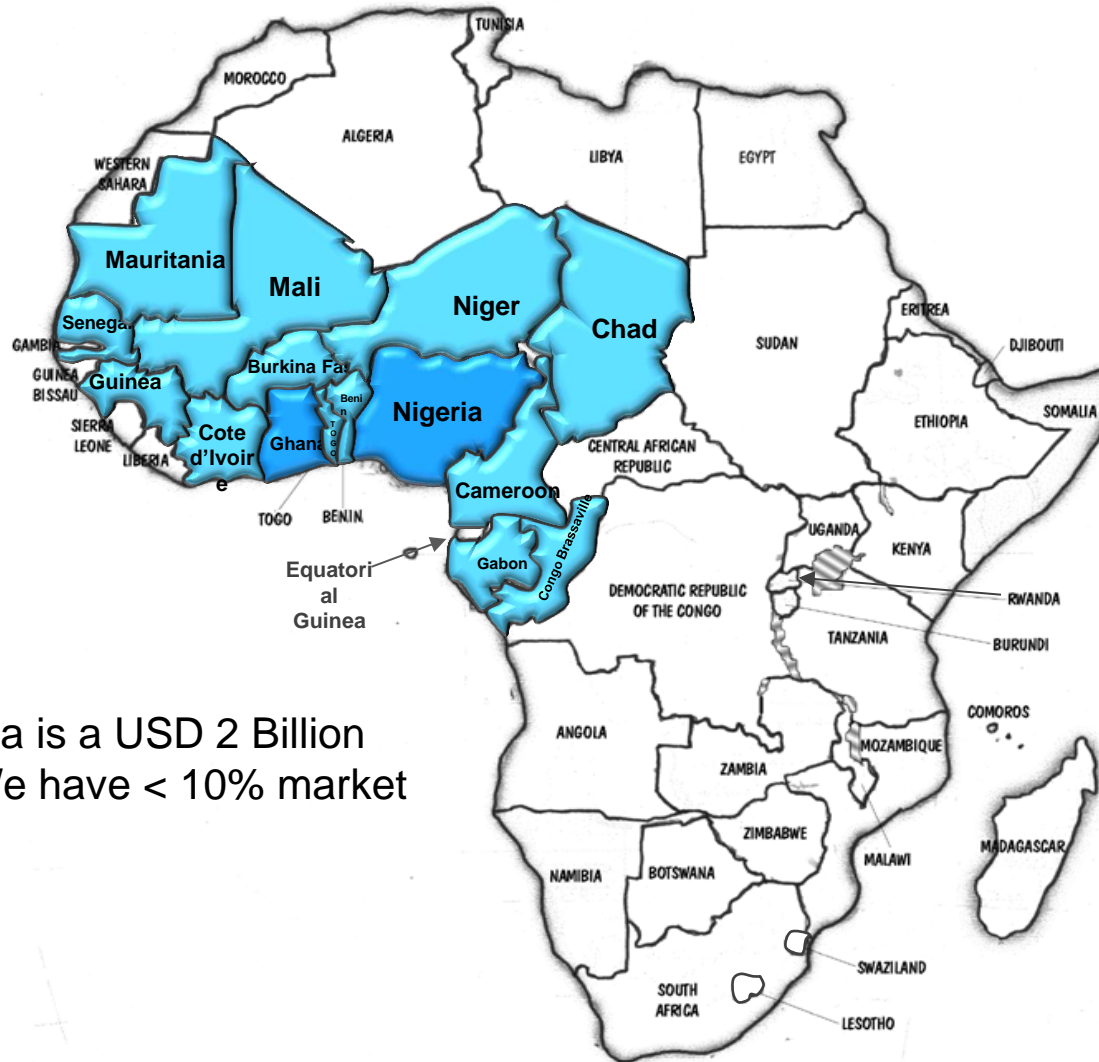
- **Payments**



A history of on time payments

- **Trust of MNCs**

Trust of world class MNC's like Abbott/GSK/Pfizer/Roche, etc. as the choice of route to market.
Strict adherence to statutory code of ethics

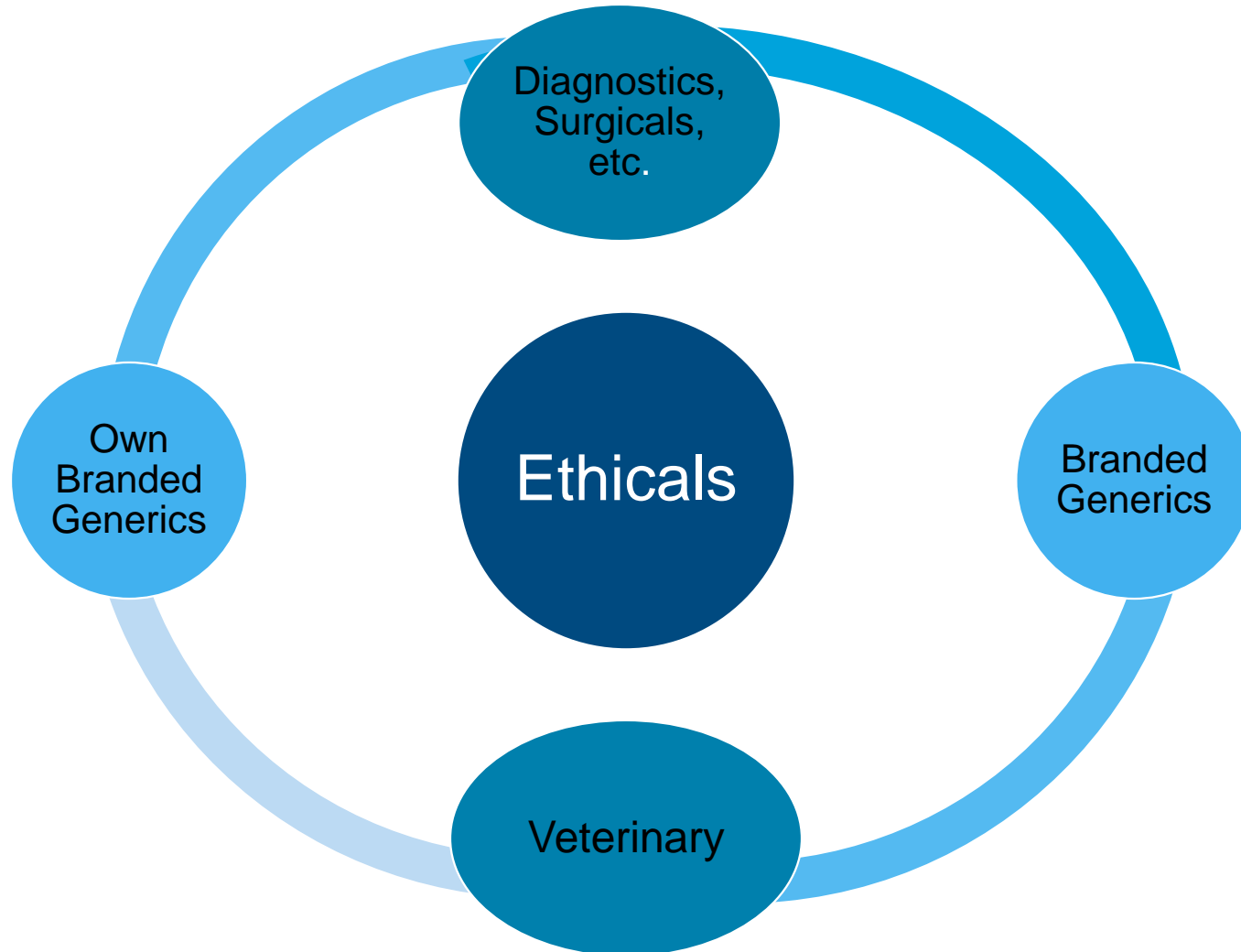
EXPANSION PLANS



-  Anglo-West Africa
-  French-Speaking Africa

West Africa is a USD 2 Billion Market. We have < 10% market share

AREAS OF BUSINESS – SCOPE FOR GROWTH





Thank you...

Sunil Gupte

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