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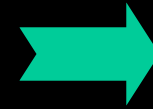
# Brand Strategy Presentation DHEA

Client : NPAFInc

# Took the Category through a Systematic Analysis...

- Where do the category problems lie?

Brand Scan



Challenge

- What is the category-consumer relationship like?

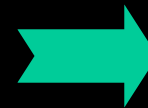
Brand Audit



Brand Print

- How do we build the brand in the outside world?

Brand World



Involvement  
Area

## DHEA on International Front...

- Called Mother of all hormones, Fountain of Youth
- Available Since 1990, 10 year old category
- DHEA a naturally occurring weak androgenic steroid hormone, produced by the adrenal glands.
- Available Over the Counter
- 4,000 companies promote DHEA products internationally
- Was earlier classified as the hormone, later on included in the health food supplement category by US FDA
- Many claims are not US FDA approved
- In US it's a 6 billion\$ market

# What is it Consumed for...

Recommended for people above 40 yrs

It has been used for a variety of reasons...

- Try and prevent aging
- Improve sexual function/erectile dysfunction,
- Treat cognitive decline,
- Enhanced athletic performance,
- Facilitate weight loss, improve strength ,
- Treat osteoporosis,
- Improve immunomodulation for rheumatologic conditions,
- Treat depression.

# What Made it Enjoy an Enviably Position in US ?

The Spirit of Self  
Reliance in American  
Society

High  
Focus on Health  
Maintenance

Heartier as they Age

# What Made it Enjoy an Enviably Position in US ?

The spirit of self reliance in American society, spilled in healthcare arena

Focus on Health Maintenance is high

Americans have open minds to alternative health care approaches. Higher use of natural remedies

Heartier as they Age,

Americans have significantly *lower* levels of sickness due to predisposition towards health maintenance.

# DHEA A Paradox



# Some of the International DHEA Brands



## Most Important Advance of the Decade...

- Current research suggests that DHEA may be of value in preventing and treating cardiovascular disease, high cholesterol, diabetes, obesity, cancer, Alzheimer's disease, immune system disorders including AIDS, and chronic fatigue.
- DHEA may also enhance the body's immune response to viral and bacterial infections.

## Most Important Advance of the Decade...

- **Perhaps most interesting**, DHEA is currently being investigated as an anti-aging hormone...
- **New evidence suggest this hormone is so beneficial for so many different conditions that it may turn out to be the most important medical advance of the decade.**

## Most Important Advance of the Decade...

- DHEA is the most abundant steroid in the human bloodstream. Research has found it to have significant anti-obesity, anti-tumor, anti-aging, and anti-cancer effects.
- **DHEA supplement may extend your life and make you more youthful while you are alive.**

# What is currently Available in the Market is a Complete Waste of Money !

## Research So far Mostly Confusing...

- Studies are on rodents, 21 human studies done so far are non conclusive
- DHEA is a substance so poorly understood and so potent that you may wonder how it can be sold as an unregulated product.
- Because of the U.S. Dietary Supplement Health and Education Act of 1994, which relaxed the rules for "dietary supplements," DHEA can be sold without testing, so long as the label makes no specific medical claims. **DHEA doesn't even exist in foods, except in the adrenal glands of monkeys and other primates, which are not sold for human consumption.**

What is currently Available in the Market is  
a complete waste of money !

## Last Words...

- DHEA is not a "natural medicine" and not a dietary supplement—and how the FDA could allow it to be classified as such remains a mystery. What's currently on the market is probably a complete waste of money. **If this supplement really works like a hormone, then it's risky business. The only certain benefit is a profit for those who sell it.**

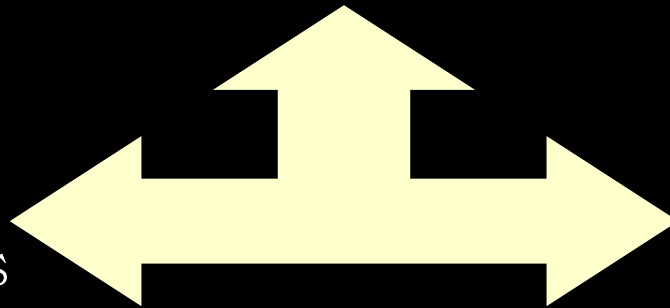
UC Berkeley Wellness Letter, February 1999

Internationally the HYPE seem to  
be going down ...

# Lack of Evidence Based Marketing

Low knowledge  
on the product

No conclusive  
clinical evidences



Animal studies  
available

Intangible benefits



Can DHEA Make it's Mark in India ?

# Health Care Scenario on Indian Front

## Good & Bad...

Not so encouraging healthcare scenario in India

Increase life expectancy among men & women

Individual Expenditure on healthcare is on rise

Non communicable diseases are on rise

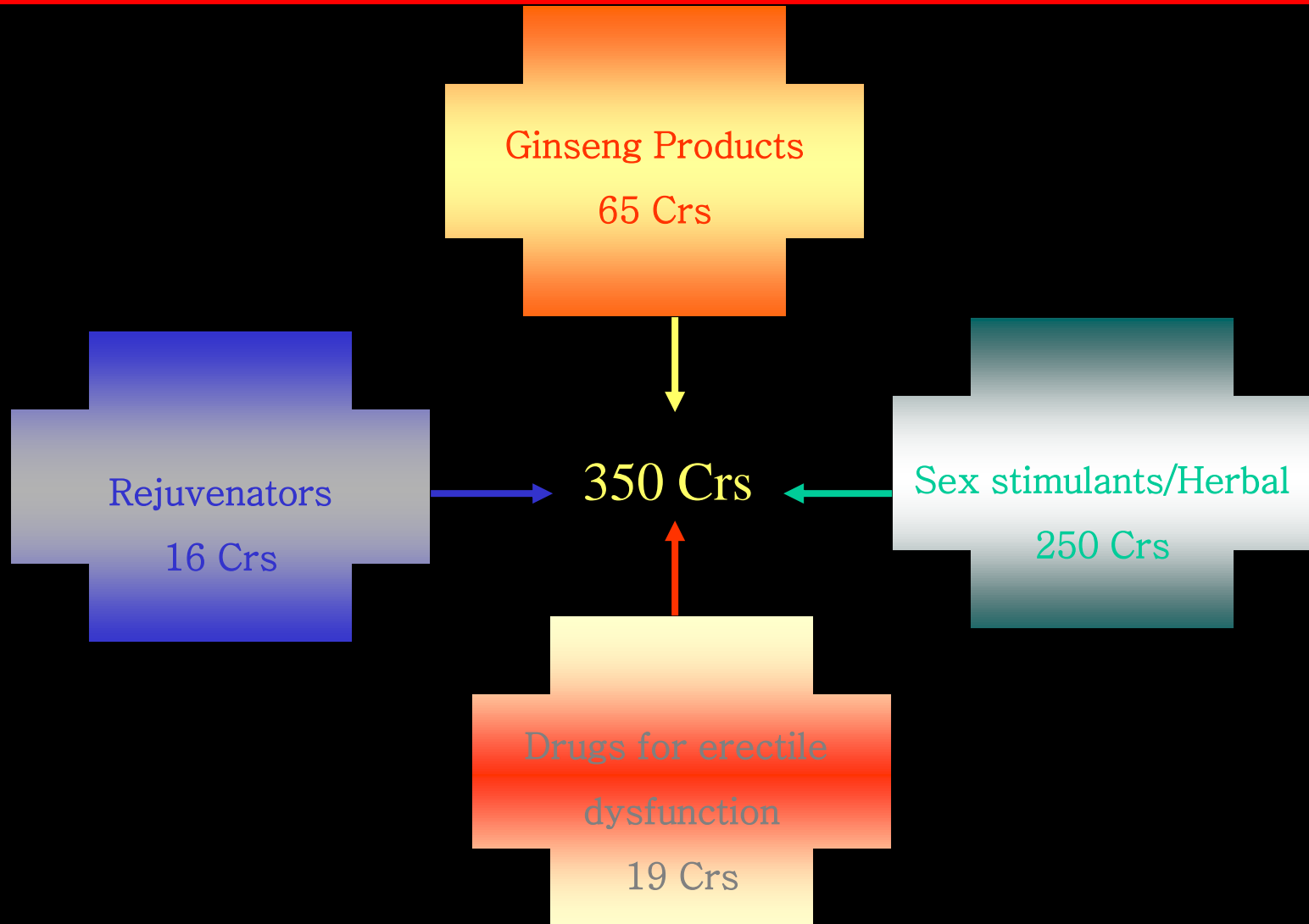
Increasing Psychological pressures on the corporate population on rise

## Health Care Scenario on Indian Front...

India faces the complex situation of increase in the non communicable diseases without a considerable reduction in communicable diseases

Pill popping among Indians for fitness ?

# Where DHEA will Compete ?



# DHEA Equivalent in Indian Market

A Miraculous Gift from Nature

## Shilajit

Purified exudate of mineral origin, Shilajit is a balanced general tonic comprising useful mineral and organic constituents.



Aids respiratory problem

Sex Stimulant

Anti-ageing

Stress Reducer

Immune Booster

Energizer

Anti-oxidant

Memory Enhancer

## Perceptions of all these categories & the players in the same...

- **All the preparations are combination preparations**
- Vitamins are prescribed by the doctors in deficiencies more than a prevention
- Minerals are mostly co prescribed with other preparations
- Ginseng combination products are prescribed in general well being as energizer

## Perceptions of all these categories & the players in the same...

- Ginseng preparation are increasingly co prescribed in diabetes, CHD
- **Category of sex stimulants** (Herbal products Shilajit/Ashwagandha, Shatavari) **a combination category is prescribed or dispensed to improve sexual function**

# Market Segmentation Communication

Communication is aspirational based in all the possible conditions with Low level of seriousness in the tone of some of the communication.



## the Future Certainly Inviting ! Opportunity Areas

- Epidemiological transition happening in India

The adult population over 45 years – 17 cr people – 5 cr in urban India – 22% increase in last 10 years

Estimated Indian above 45 yrs by 2005 is 22.7 cr – 17% of population

- There is an increasing trend towards the consumption of pills as overall fitness boosters since the ageing population is on rise

## the Future Certainly Inviting ! Opportunity Areas

- Economic transition happening in India
- Increase consumptions of fitness potions since non communicable diseases are on rise, making Quality of Life much more important
- Vacating slot of rejuvenators

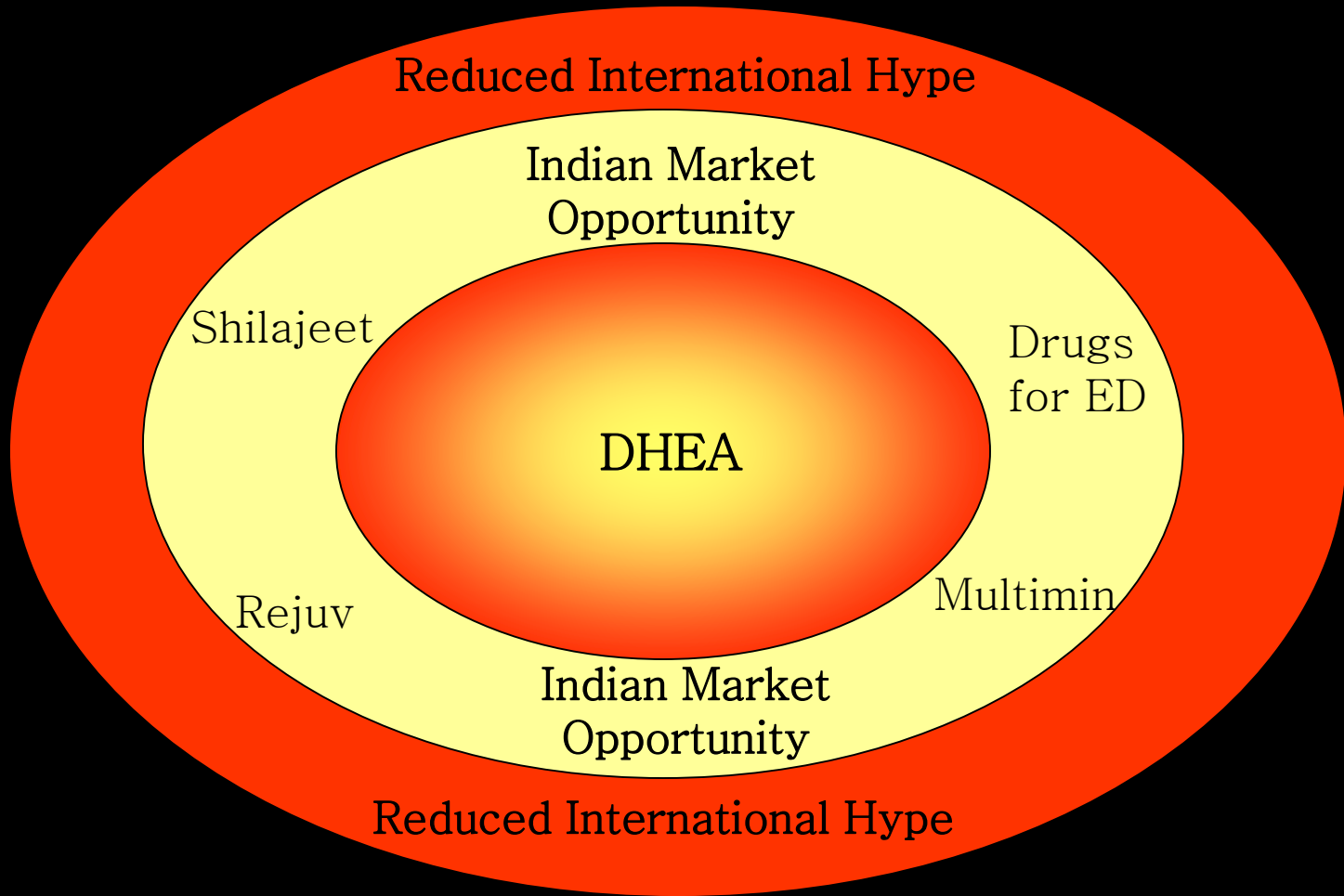
## Major Issues & therefore the Challenges

- Some categories are highly Doctor prescription driven
- Highly fragmented category
- Category has diffused perception
- Lack of source credibility in certain therapies

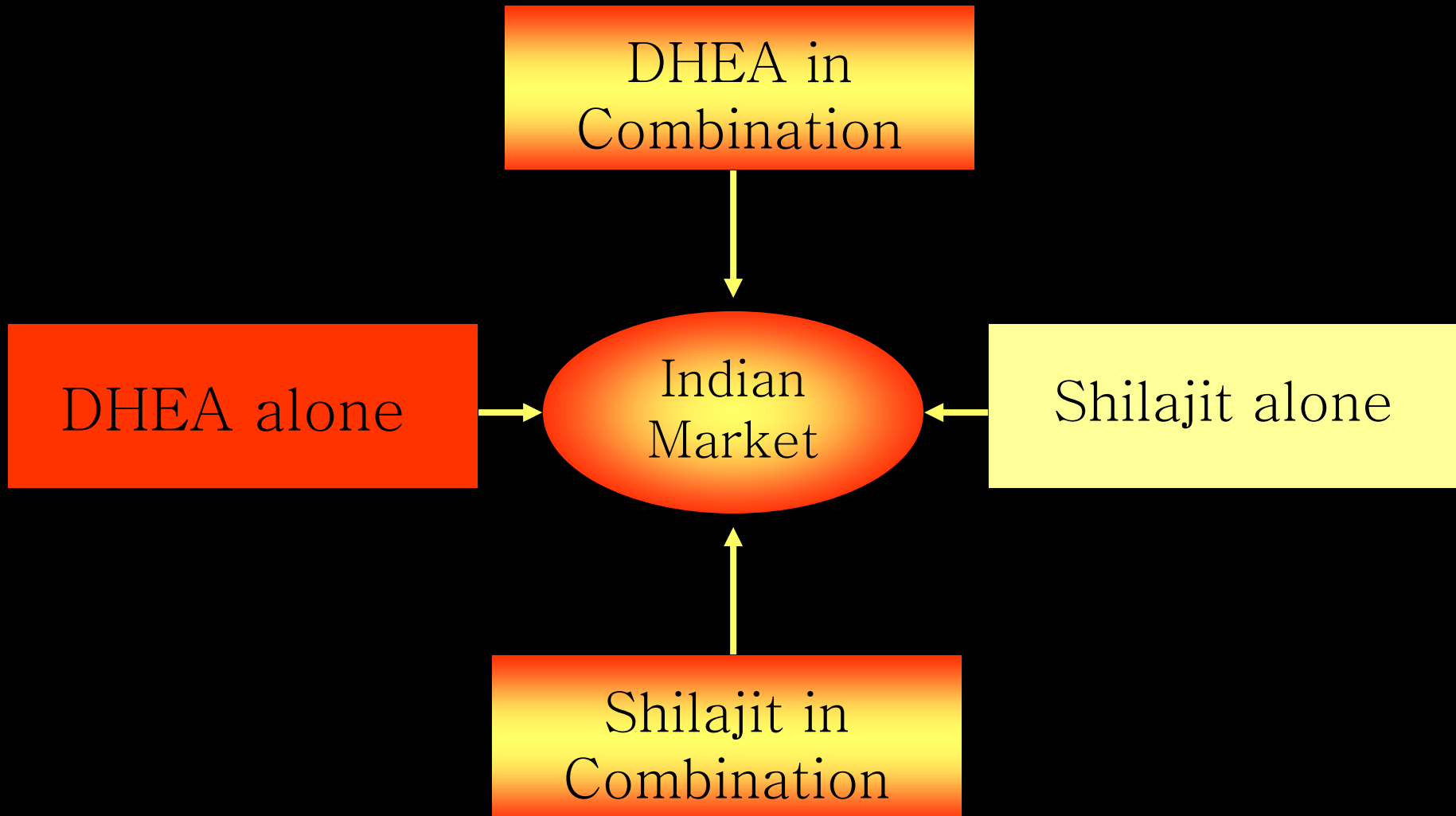
## Major Issues & therefore the Challenges

- Convert a diffused perception in a much more focused perception
- Build a category credibility

# But What will Work ?



## But What will Work ?

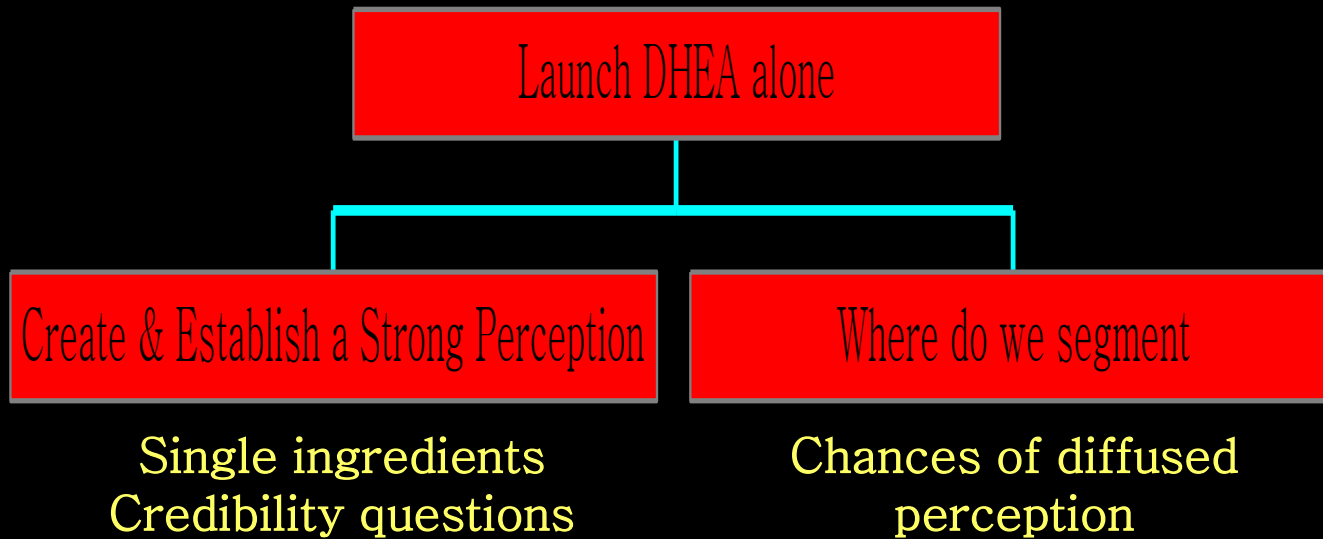


# Perception & the Reality Check

	DHEA	DHEA Combn	Shilajit	Shilajit Comb
Indian market reality on Combns	+	+++	++	+++
Perception of the ingredients				
Sex Stimulant	+++ 1			+++
Energizer	+++ 3		++ 4	
Destresser	+++ 2		++ 3	
Anti ageing	+++ 3		-	
Co prescription in Diabetes	+ 4		+++ 1	
Gall stones	-		+++ 2	
Clinical studies credibility	++		++	
Image of the ingredient	+++		+++	
Image of the company	+++		+++	
Price Perception	+++		+++	

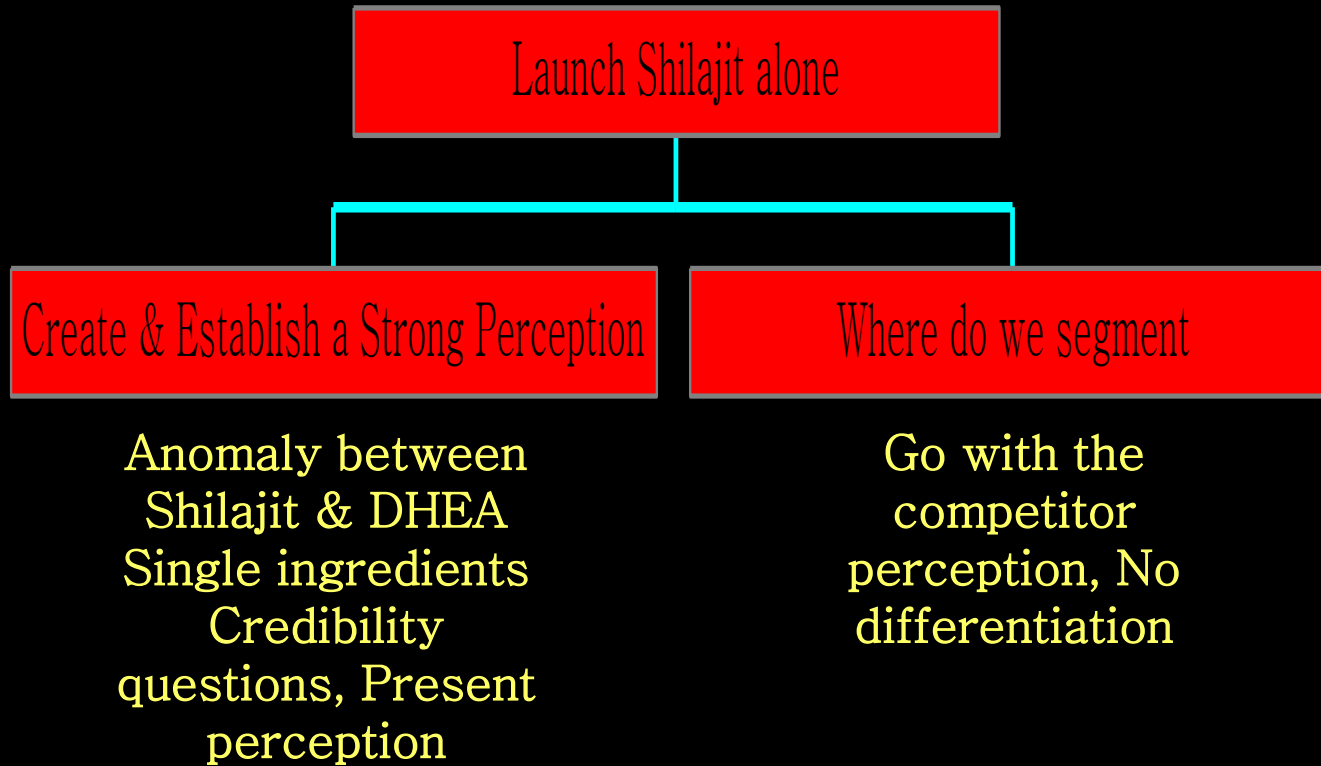
+++ High ++ Medium + Low

# What If...





# What If...



# What If...

Launch DHEA in Combination

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graph TD; A[Launch DHEA in Combination] --> B[Create & Establish a Strong Perception]; A --> C[Where do we segment / Create a strong brand architecture]; A --> D[What should be the combination];
```

Create & Establish a Strong Perception

**Revital in Making**

Where do we segment  
Create a strong brand architecture

DHEA & its Comb n as  
a Hormone Balancing  
Supplement for Men  
Andro pause\_ Co  
prescription in ED,  
Sexual stimulants,  
General sense of well  
being

What should be the combination

**DHEA + Vitamins  
? Minerals ?**

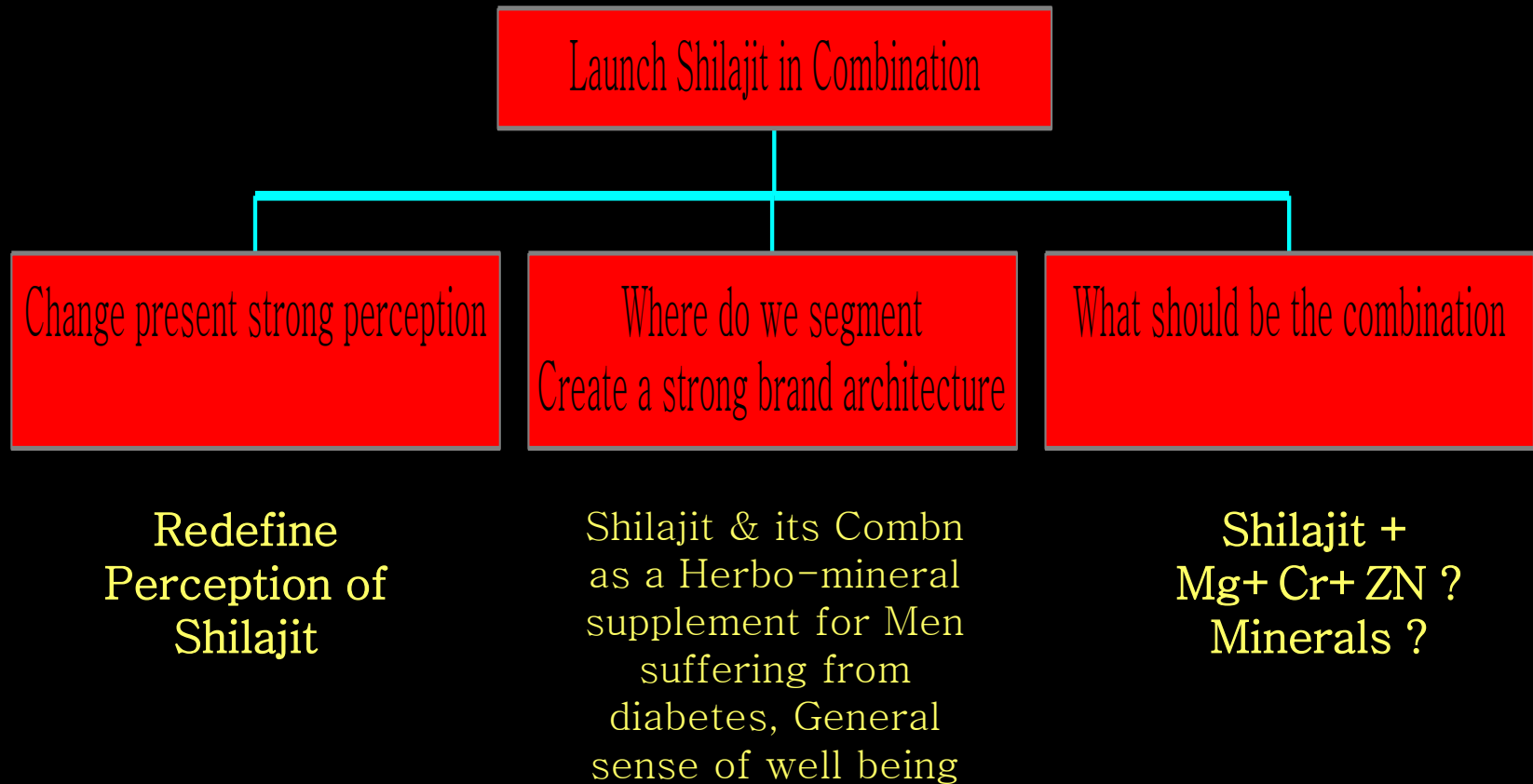
# Learning from the Past

## REVITAL Ranbaxy

- Ginseng + Vitamin Preparation
- Ginseng – a fairly well studied ingredient
- Strong perception of an aphrodisiac
- Ranbaxy came out with a combination of Ginseng & other vitamins
- Created a new perceptual drawer for the brand

Today a successful brand of 41 Crs still  
combination

# What If...



# Learning from the Past

## Shilajit & Shilajit Combinations

- Shilajit + other ingredients (ashwagandha, Shatavari, etc.)
- Shilajit – Mentioned in the books of Ayurveda for a multi faceted purpose
- Strong perception of Sex stimulant
- People from all strata of society come & buy it.
- They know for what they are buying it
- We dispense it for ‘Takad ke liye’

# The Way Forward

Check Through the Research... What is Easier & Faster  
**To Create a perception** Or

**Redefine the Perception**

AND

**Define Most Potential Segments**

**Derive New combination**

Once We decide the Way Forward  
Must Haves...

Our Communication will have

- Strong idea,
  - Rational communication
  - Consumer insights

# MISSION

Define our mission while launching the brand

Direct to Consumer  
Advertising

Medical Marketing Communications  
Doctors and Pharmacists

Public Relations

Clinical Studies

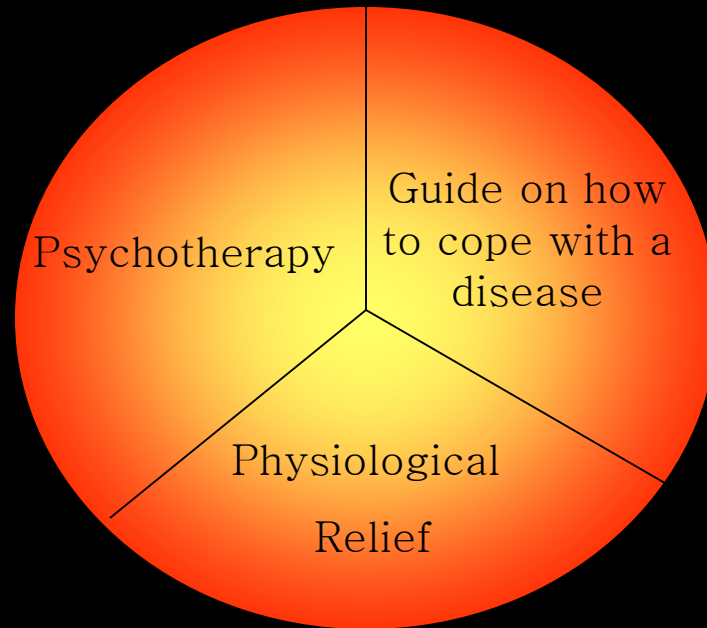
Key Opinion Leaders

Internet

Rational communication, strong consumer insights will be the part of every activity .



# Doctor will be the important facilitator



“All diseases have a psychological element... just by telling the patient about it in polite, re-assuring way you have ‘cured’ 20–30% of it”

We have a lot of Question Marks!!!

Together Let us find the

BEST Solution !