

**AN INVESTIGATION INTO MARKET POSITIONING
STRATEGIES PRACTISED BY PHARMACEUTICAL FIRMS
MARKETING MEDICINES IN NAIROBI**

PRESENTED BY:

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**A Management Research project Submitted in Partial Fulfilment of the
Requirement of the Degree of Master of Business Administration School
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DECLARATION

This management research project is my original work and has not been presented for a degree in any other University

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This project has been submitted for examination with my approval as the university supervisor.

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DEDICATION

To my wife Dr Nancy Njeru for the overwhelming support and encouragement that she gave me when I was taking this programme. To my sons Benjamin and Michael, for enduring my absence when I was taking this course. To my dad Mr Njeru and my mother Jerusha for bringing me up in a good way.

ABSTRACT

The pharmaceutical companies today are facing stiff competition due to the increased number of medicines in the market. For firms to survive, it has been necessary to develop positioning strategies to enable them occupy distinctive place in the mind of the consumers. It is against this background this study was formulated to identify the positioning strategies, used by the pharmaceutical companies marketing medicines in Nairobi. The survey research design was used in the study. Out of 112 pharmaceutical companies in Nairobi, 50 were selected and 37 responded. Purposive sampling method was used to select sample elements and the data was collected using the questionnaire method. Background information of the firm was analysed using frequency tables and percentages, while that on positioning strategies was analysed through mean score and standard deviation.

Ranking using means was done. The findings indicated that the firms use various positioning strategies and the most popular one is quality positioning, Positioning by use or application is the second most in practise. Product features and benefits positioning strategy is the third in practice. Price positioning strategy was found to be the least in practice. Further research should be done to determine why price positioning strategy and use of cultural symbols are least practised by the pharmaceutical companies.

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CHAPTER ONE: INTRODUCTION

1.1 Background of the study

The global pharmaceutical industry has developed tremendously, becoming increasingly globalised and sophisticated. Over half the sales of the fifty largest drug companies are made outside their home country (Tarabusi, 1993). In Kenya, there are currently 45 local pharmaceutical manufactures engaged in the formulation and packaging of medicines for human and veterinary use and production of some medical supplies like syringes. These local manufacturers primarily produce generic medicines that are generally more affordable.

Previously, some multi-national pharmaceutical companies had local production plants in Kenya, but over the years, these have been transferred to other countries due to unfavourable conditions like poor infrastructure and high energy costs.

A major concern for private sector pharmaceutical services is the fear of public obtaining substandard or counterfeit medicines, or incorrect dispensing of medicines by unauthorised personnel. The public sector procurement and supply of medicines is through the Kenya Medical Supplies Agency (KEMSA). Mission for essential drugs and supplies (MEDS) is the procurement and supply agency which primarily serves the faith based health facilities as well as non governmental organisations in health on a not for profit basis

1.1.1 Concept of market positioning strategy

Positioning appears to have evolved from market segmentation targeting and market structure changes during the 1960s and the early 1970s (Sekhah, 1989). Ries and Trout (1986) concluded that positioning starts with the product, a piece of merchandise, service, a company and institution or even a person. They argue that positioning is not what is done to the product/service, but rather what is done to the mind of the prospect. Kotler (2000) defines positioning as the act of designing the company's offering and image to occupy a distinct place in the target market's mind.

There is a general agreement that positioning has become one of the fundamental components of modern marketing management (Kotler 2000). Its importance is further supported by evidence that indicates a positive relationship between company

performances in terms of profitability, efficacy and well formulated and clearly defined positioning activities (Brooksbank, 1994; Delvin et al, 1995; Porter, 1996). There is a clear acknowledgment of relevance and importance of the concept within the domain of business marketing. Dovel (1990) contended that positioning should not just be part of your strategy; it should be the backbone of your business plan. This is echoed by Webster (1991) who stated that positioning is an important strategic concept, developed in consumer marketing but with equal applicability for industrial products and services.

Kotler (1997) underlines the importance of clear and strong positioning. He warns of four major positioning errors that can undermine a company's marketing strategy. Under positioning happens when customers have only vague ideas about a company or its products and do not perceive anything special about it. Over positioning happens when customers have too narrow an understanding of the company, product or brand; Mont Blanc sells pens that cost several thousands pounds, but its important to that company for the consumer to be aware that a Mont Blanc pen can also be purchased for under £ 100. Confused positioning may happen if frequent changes and contradictory messages simply confuse customers about a company's positioning. The indecisiveness of the retailer Sainsbury's about whether or not to have a loyalty card to rival Tesco's launch of its card, and about its price level compared with others, contributed to its loss of market leadership in the 1990s. He finally tackles doubtful positioning. This happens if the claims made for the company, product or brand simply cannot be accepted, whether or not they are true.

Positioning involves a decision to stress only certain aspects of our brand and not others. Such positioning is mainly achieved through a brand's marketing communication, although its distribution packaging and pricing and actual products also can play major roles. (Rajeev ,Myers & Aaker ,1996). Several commentators have claimed that despite the inherent differences between physical goods and services, (Zeithmal and Bitner, 1996), there are overlaps between services and physical goods (Baker,1981;Levitt,1981). This means there is no compelling reason to adopt different positioning strategies in services. Rajeev et al (1996) have suggested seven approaches that are used in positioning. These are:

Use of product characteristics or customer benefits, the price quality approach, the use or application approach, the product user approach, the product class approach
The cultural symbol approach and the competitor approach.

1.1.2 The pharmaceutical industry

The pharmaceutical industry is regulated by the pharmacy and poisons board. The board was established in 1957 under the pharmacy and poisons act cap 244 with the mandate to control the trade in medicines and poisons. Pharmaceuticals are a principle export to the EAC and the COMESA regions, amounting to 0.3% of the value of all the exports to these destinations in 2008. However, the country is a net importer of pharmaceuticals. In 2008, Kenya shillings 20.7 billion worth of pharmaceuticals were imported, a 30% increase from 2007. The imports are mainly from India, china, Europe, and other countries. There is no policy guidance on the pricing of medicines and the competition of suppliers is not regulated. The practice in the retail sector is to charge 33% above the trade price. WHO estimates that 80% of people in Africa have used traditional medicines at some point in their life. Four issues of concern are; Inappropriate promotion and advertising of traditional medicines, lack of comprehensive documentation on traditional medicine use, safety, efficacy and quality, inadequate policy and legal frame work to guide traditional medicine development and use and finally inadequate human resource capacity to address issues of public health and safety.

Public financing of health sector through exchequer was about 29.3% of total health expenditure or 11 US\$ per capita in 2009, up from US\$ 6 in 2002 due to increased public spending in the social sectors. This health expenditure is about 4.8% of nominal GDP and it falls below the WHO recommended level of US\$ 34 per capita (of which a minimum of \$2.5 should be on essential medicines), and far short of government commitment to spend 15% of national health budget as agreed in Abuja Declaration of 2001 and 2006.

1.2 The statement of the research problem

According to the Pharmacy and Poisons Board (2006) database, there were 208 registered wholesalers and 945 retailers in the pharmaceutical sector. Licensed local manufacturers were 35 in the same period. These numbers have been increasing and according to the board's database for 2008, registered wholesalers were 212 and retailers were 1279. In 2009 database, the number of licensed local manufacturers was 45. It is assumed that with an increase in the number of traders, there is an increase in the number of drugs being sold in the market. The number of registered pharmaceutical products was 12,008. Sullivan et al (2008) noted that there is an increasing competition for the branded market share from generic products. There is a great need for pharmaceutical companies to differentiate themselves from their competitors and identify a market niche that can invest their loyalty to them. One proven way of doing this is by adopting a positioning strategy that will appeal and occupy a distinctive place in the mind of the target market. The growth of the generic pharmaceuticals market is expected to exceed the growth of branded pharmaceuticals market, due to increased government expenditure on healthcare. Branded pharmaceuticals continue to be more popular within the private sector, due to better quality and efficacy. However, the growth of this market is expected to be slower than the market for generic pharmaceuticals in the years to come. Sullivan & Frost (2008) found that the generic market constituted about 56.0% of the Kenyan pharmaceutical market. The branded pharmaceuticals market represented 44.0% they also found out that, the pharmaceutical industry in Kenya is dominated by foreign-owned companies, which own a 72.0% share of the market. Locally manufactured goods represented 28.0%

Sullivan et al (2008) did an analysis of the five forces of Michael Porter in the Kenyan branded pharmaceutical market. The threat of new entrants in the branded pharmaceutical market is medium to high. As brands become established in the market, more therapeutic classes are expected to be added. The threat of substitute products is high, largely due to the availability of low-cost generic substitution. The threat of an established brand being replaced with another brand is medium; however, substitution between brands would become a consideration, if a new brand with a

good reputation can undercut the price of an established brand. Brand substitution is driven by awareness and reputation.

The bargaining power of suppliers of original brands can be rated as medium to high, since the suppliers are concentrated with a few well-established brands in the market. Products are also differentiated in terms of innovation and providing care to niche markets, rather than on price. The threat of backward integration by purchasers is unlikely. If the brand is competitively priced or covers a niche market, bargaining power is expected to be higher. The bargaining power of customers in this market is high. Competition in the branded market is increasing, as generic companies are penetrating the market and are capturing market share from branded drugs

Several studies in the Kenyan pharmaceutical industry have been done. Among these; a survey of quality management practices of pharmaceutical manufacturing companies by Kiptum (2008). A study on perception of pharmaceutical producers and end users towards the role played by pharmaceutical distributors using the value chain concept in Kenya by Ikundo (2007). Ogollah (2007) did a study of strategic practices of pharmaceutical importers and distributors in Kenya. Mbirwe (2007) did a study on positioning strategies used by retail pharmacies in Nairobi. She found that location and branding are among the most important positioning strategies for retail pharmacies. They do not market medicines to medical doctors. Despite the importance of positioning, no similar study has been done that has addressed market positioning strategies by pharmaceutical companies in Nairobi. This study will therefore endeavour to find out the market positioning strategies employed by pharmaceutical firms marketing medicines in Nairobi.

1.3 Research objectives

The objective of the study is:

To determine the positioning strategies employed by the pharmaceutical companies marketing medicines in Nairobi.

1.4 Importance of the study

The results of this study are expected to benefit marketing managers of the pharmaceutical companies. They can use these strategies to ensure continued growth and sustainability of their firms. The findings will also be useful to marketing managers in other industries who may use the various positioning strategies to gain a competitive advantage for their firms and finally, the study will benefit the researchers and academicians as a source of reference for future studies on positioning strategies in the pharmaceutical industry.

CHAPTER TWO: LITERATURE REVIEW

2.1 The concept of positioning strategy

Positioning appears to have evolved from market segmentation, targeting and market structure changes during the 1960s and the earlier 1970s (Sekhar, 1989). In the last few years, however writers on the subject have credited Ries and Trout for popularizing the term. In their work, Ries and Trout (1986) concluded that positioning starts with the product, a piece of merchandise, a service, a company an institution or even a person. They argue that positioning is not what is done to the product or service, but rather what is done to the mind of the prospect i.e. Positioning shifts the emphasis of marketing from the product to the battle for your mind. The emphasis of their debate centred on the communications, advertising elements of positioning.

Positioning is developed to achieve the objectives laid down under the core strategy. Porter (1980) has argued that a competitive advantage can be created in two main though not exclusive ways. The first type of advantage involves pursuing a cost leadership position in the industry. Under this strategy, the company seeks to obtain a cost structure significantly below that of competitors while retaining products on the market that are in close proximity to competitors offerings. Cost leadership is attained through aggressive construction of effective economies of scale, cost reductions on overheads, research and development, services, sale force among others. Cost leadership strategy is suitable in commodity markets where there is little or no differentiation between the physical products offered. The second approach to creating a differential advantage is differentiation (Porter 1980). It means creating something that is seen as unique in the market. The company strengths and skills are used to differentiate the company's offerings from those of its competitors along some criteria that are valued by consumers.

Peng (2009) states that the word strategy was derived from the Greek word *Strategos*. It referred to the art of the general. Strategy has a very strong military roots dating back to around 500 BC with the work of Sun Tzu, a Chinese military strategist. His most famous teaching is "know yourself, know your opponents, encounter a hundred battles, win a hundred victories". In business, strategy started being applied in 1960s

Thompson et al (2007) defines a company's strategy as management's action plan for running the business and conducting operations. They further explain that a company's strategy is all about *how*. How the management intends to grow the business, how it will build a loyal clientele and out compete rivals, how each functional piece of the business (research and development, supply chain activities, production, sales and marketing, distribution, finance and human resources) will be operated how performance will be boosted. They conclude that in choosing a strategy, management is in effect saying, "Among all the many different business approaches and ways of competing we could have chosen, we have decided to employ this particular combination of competitive and operating approaches in moving the company in the intended direction, strengthening its market position and competitiveness and boosting performance".

Mintzberg (1985) has five definitions of strategy. He defines strategy as plan, ploy, pattern, position and perspective. Strategy as a plan is some sort of consciously intended course of action, guideline to deal with a situation. As a plan, strategy can be a ploy too, really just a specific 'Manoeuvre' intended to out wit an opponent or competitor. Strategy is a pattern - specifically, a pattern in a stream of actions .In other words, strategy is consistency in behaviour, whether or not intended. Strategy as a position means the mediating force or match between an organization and the environment. Strategy as a perspective is explained as an ingrained way of perceiving the world. They therefore conclude that strategy as a perspective is shared by the members of an organization, through their intentions and or by their actions. Porter (1985) defines strategy as the commercial logic of a business that defines why a firm can have a competitive advantage. He further explains that strategy is what a company does and how it actually positions itself commercially and conducts the competitive battle. Strategy is the direction and scope of an organization over the long term which achieves advantage for the organization through its configuration of resources within a changing environment to meet the needs of markets and to fulfil stakeholders expectations (Scholes 2003).

2.2 The process of developing a positioning strategy

The approaches to positioning process have been described by three authors. The first approach is by Kotler&Garry (2010) they points out that for a firm to position its offerings in the market, differentiation is essential. They explain that differentiation and positioning follow the four steps below. First, the firm needs to identify a set of differentiating competitive advantage up on which to build a position. Second, the firm needs to choose the right competitive advantage. Thirdly, the firm needs to select an overall positioning strategy, and finally the firm needs to effectively communicate and deliver the chosen position to the market. In identifying the possible value differences and competitive advantages, a firm may use the following points of differentiation.

Product differentiation

In Product differentiation, brands can be differentiated on the basis of a number of different product or service dimensions; product form, features, performance, durability, reliability, reparability, style and design as well as ordering ease, delivery, installation, customer training, customer consulting and maintenance and repair. Hooley, Piercy & Nicouland (2008) explains that for the manufactured product, quality is measured on durability, appearance or grade of product. Further, they say that packaging can be used to differentiate a product.

Hooley et al (2008) explains the five main functions of packaging each of which can be used as a basis for differentiation. The first function is that packaging stores the product and hence can be used to extend shelf life, or facilitate physical storage. An example is the use of tetra packs for juices. Secondly, packaging protects the product during transit and prior to consumption to ensure consistent quality. Example is the use of film packs for potato crisps to ensure freshness. He further explains that packaging facilitates the use of product. Example is applicator packs for floor cleaners, domestic liquid soap dispensers. Another function of packaging is it helps create an image for the product through its visual impact, quality of design, illustration of use etc. Finally, packaging helps promote the product through eye-catching visual colours and shapes.

Service differentiation

Kotler et al (2010) gives an example of speedy convenient or careful delivery as way of service differentiation. Hooley et al (2008) explains that for service brands quality is measured on reliability, responsiveness of the service provider, the assurance provided of the value of the service, and the empathy or caring attention received.

Distribution channel differentiation

Kotler et al (2010) mentions that companies can achieve competitive advantage through the way they design their channels coverage, expertise, performance. Hooley et al (2008) says that distribution differentiation comes from using different outlets, having a different network or a different coverage of the market. They give an example of how internet has made significant changes to distribution strategies particularly for firms offering bit-based products such as information, or music. Direct distribution to customers through their internet connection is now possible.

Personnel differentiation

Companies can gain a strong competitive advantage through having better trained people. Kotler et al (2010) notes that better trained personnel exhibit six characteristics. One, a better trained person displays competence, meaning they possess the required skill and knowledge. A better trained person displays courtesy, meaning they are friendly, respectful and considerate. They are also credible, meaning they are trustworthy. Better trained personnel are reliable because they perform the service consistently and accurately. They also exhibit responsiveness because they respond quickly to customer's requests and problems. The sixth characteristic is that they make an effort to understand the customer and communicate clearly. Image differentiation is the way the public perceives the company or its products.

Choosing the right competitive advantage

Kotler et al (2010) outlines that not all brand differences are meaningful or worthwhile. Not every difference makes a good differentiator. Each difference has the potential to create company costs as well as customer benefits. A difference is worth establishing to the extent that it satisfies the following criteria. A firm must decide how many differences to promote and which ones. A difference is worth establishing

to the extent that it satisfies the following criteria. One, the difference is important. The difference delivers a highly valued benefit to the target buyers. Secondly, the difference is distinctive, meaning competitors do not offer the difference or the company can offer it in a more distinctive way. Thirdly the difference is superior to other ways that customers might obtain the same benefit. The difference is communicable and visible to buyers and the difference is pre-emptive because competitors cannot easily copy the difference lastly, the company can introduce the difference profitably

Selecting an Overall Positioning strategy (value proposition)

Kotler et al (2010) explains that the full positioning of a brand is called the brand's value propositions. I.e. the full mix of benefits up on what the brand is differentiated and positioned. Value proposition is the answer to the customer's question "why should I buy your brand?"

Value propositions up on which a company might position its products

More for more value proposition

'More for more' positioning involves providing the most upscale product or service and charging a higher price to cover the higher costs. 'More for more' brands can be vulnerable. They often invite imitators who claim the same quality but at a lower price.

More for the same proposition

Companies can attack a competitor's more for more positioning by introducing a brand offering comparable quality but at a lower price. E.g. Toyota introduced its Lexus line with a more for the same value proposition versus Mercedes and BMW. Toyota was charging \$ 36,000 dollars and Mercedes, BMW was \$ 72,000.

The same for less value proposition

Everyone likes a good deal. Offering the same for less can be a powerful value proposition. Discount stores such as METRO cash and carry use this positioning. They do not claim to offer different or better products. Instead, they offer many of the

same brands as department stores and specialty stores but at deep discounts based on superior purchasing power and lower cost of operations.

Less for much less proposition

In many cases, consumers will gladly settle for less than optimal performance or give up some of the bells and whistles in exchange for a lower price. E.g. many travellers in lodgings prefer not to pay for what they consider unnecessary extras, such as a pool attached restaurant, or mints on the pillow. 'Less for much less' positioning involves meeting consumer's lower performance or quality requirements at a much lower price.

More for less value proposition

In the long run, companies find it difficult to sustain such best of both positioning. Offering more usually costs more making it difficult to deliver on the "for less" promise.

Developing a positioning statement

Company and brand positioning should be summed up in a positioning statement. The statement should follow the form *'to (target segments and need) our (brand) is (concept) that (point of difference)*. Example To busy, mobile professionals who need to always be in the loop, BlackBerry is a wireless connectivity solution that gives you an easier, more reliable way to stay connected to data, people, and resources while on the go. Important to note is that, the positioning first states the product's membership in category (wireless connectivity solution) and then shows its point of difference from other members of the category (easier, more reliable connection to data people and resources).

Communicating and delivering the chosen position

All company's marketing mix efforts must support the positioning strategy. Designing the marketing mix of products, price, place, and promotion involves working out the tactical details of the positioning strategy. Thus, a firm that seizes on 'more for more' position knows that it must produce high quality products, charge a high price, distribute through high quality dealers and advertise in high quality media. It must

hire and train more service people, find retailers who have good reputation for service and develop sales and advertising messages that broadcast superior service. This is the only way to build a consistent and believable more for more position.

The second approach to positioning process.

Rajeev, Myers & Aaker (1996) describes positioning process as iterative. It necessitates deliberate and proactive actions; it involves decisions at conceptual, strategic and operational levels and should reflect the triumvirate deliberations of the company, its competitors, and its target market/customers. There is little literature available on the process of positioning in business markets despite its apparent relevance to a broad spectrum of marketing activities. Available literature is dominated by advertising like work by Ratneshwar et al (1991) and by Kalra et al (1998). The identification and selection of a positioning strategy can be difficult and complex. However, it becomes more manageable if it is supported by marketing research and decomposed into a six step process.

Identifying competitors

In most cases, there will be primary group of competitors and one or more secondary competitors. It's useful to identify both categories. Knowledge of various ways to identify such groupings will be of conceptual as well as practical value. One approach is to determine from buyers of a product which other products they may have considered instead. Another approach is the development of associations of products with use situations.

Determining how the competitors are perceived and evaluated

It is necessary to choose an appropriate set of product attribute for comparison. Attributes includes product characteristics, customer benefits and product associations such as product uses or product users. One study found that the relevant attribute list for tooth paste was considered to include prevention of decay, taste, whitening capability, colour, and attractiveness of the product packaging and price.

Determining the competitors positions

The primary focus of interest is how they are positioned with respect to relevant attributes. What is the customer's image of the various competitors? Which competitors are perceived as similar and which are different? Analyzing the customers is the next step. It is important to specify where in the perceptual map the brand should be positioned. It requires knowing which areas in the map will be attractive to the customers.

Making the positioning decision

The four steps described should be conducted prior to making the actual positioning. The exercise can be done subjectively by the involved managers if necessary although marketing research is more definitive. The following guidelines can be followed when choosing the position for the brand. First, an economic analysis should guide the decision. The success depends on the potential market size times the penetration probability. The market size, right now or very soon should be worthwhile. Secondly, Positioning usually implies segmentation commitment. Positioning usually means that an overt decision is being made to ignore parts of the market and concentrate only on certain segments; such an approach requires commitment and discipline, because it's not easy to turn your back on potential buyers. Rajeev et al (1996) further explains that if the advertising is working, stick with it. An advertiser will often get used to a positioning strategy and the advertising used to implement it and will consider making a change. However, the personality or image of a brand, like that of a person evolves over many years, and the value of consistency through time cannot be over estimated. Finally don't try to be something you are not. It is tempting but usually fatal to decide on a positioning strategy that exploits a market need or opportunity but assumes that your product is something it is not. Consider symbols. A symbol or set of symbols can have strong associations that should be considered when making positioning decisions.

Monitoring the position

A positioning objective, like any marketing objective should be measurable. To evaluate the positioning and to generate diagnostic information about future

positioning strategies, it is necessary to monitor the position over time. A variety of techniques can be employed to make this measurement. Example is the Hamburger helper used a personality test. However, usually one of the more structured techniques of multi-dimensional scaling is applied.

The third approach to positioning process

Hutt (2007) has suggested six steps that may be followed by firms when positioning their products. The first step is to identify the relevant set of competitive products. Secondly is to identify the set of determinant attributes that customers use to differentiate among options and determine the preferred choice. This is then followed by collection of information from a sample of existing and potential customers concerning their rating of each product on the determinant attribute. The fourth step is to determine the products current position versus competing offerings for each market segment. This is followed by examination of the fit between preferences of market segments and current position of the brand .Select positioning or repositioning.

2.4 The various positioning strategies

Use of product characteristics positioning strategy

Rajeev et al (1996) explains that probably the most used positioning strategy is to associate an object with a product characteristic or customer benefit. In automobiles, Honda and Toyota have emphasized economy and reliability .Volvo stressed on safety and durability. A new product can be positioned on characteristics that competitors have ignored. Brand of paper towel had emphasised absorbency until viva was successfully introduced stressing durability.

Price positioning strategy

For a price positioning strategy to be successful in the market place, the existence of a viable, price - sensitive customer segment is also required. The firm needs to have a cost advantage in serving that market segment. Among the leaders in the low-price, no - frills air travel market is easy jet, launched in 1995. The airline is positioned as low price, no frills, appealing high frequency, point to -point, and shorthand schedules across Europe. The firm makes extensive use of the internet to keep costs down where up to 90% of booking is online. Reliance purely on low price based

positioning carry high risks if the firm has no other competitive advantage. Rajeev (1996) states that many manufacturers deliberately attempt to offer more in terms of service, features or performance. They charge more partly to communicate the fact that they are of high quality and partly to cover high costs of production.

Quality positioning strategy

Positioning as a high technical quality suppliers requires effective internal control systems especially quality assessment and assurance. Technical competence is also required. Also critical to a quality positioning are the marketing assets of brand image and reputation, image reputation can take years to create and, once established, need to be nurtured and where necessary aggressively defended. To customers, quality is manifest through better reliability, durability and aesthetic appearance. Quality and value are what customers perceive them to be.

Innovation positioning strategy

Where markets are changing rapidly, especially as a result of technological development, there may be opportunities to position on the basis of innovativeness or speed to market. The key competences required include excellent new product development skills together with technical and creative abilities. Innovation may also come in the form of new processes or approaches to market e.g. Dell sells PCs direct to business (and to a lesser extent household consumers) rather than through retail shops and retailers. Direct marketing eliminates the intermediaries and also speeds up the time to market the computers.

Service positioning

Positioning on the basis of offering superior service or a service tailored to the needs of the target market is increasingly being used. Critical to providing superior service are market sensing skills which can identify what level/type of service is required, customers bonding skills that build closer relationships with key customers, service systems that assist the service providers in delivering service to customers, and monitoring skills that regularly assess the customer satisfaction with the level and type of service provided. Most critical of all in providing superior service are the people or staffs that actually provide the service. Selection, training, motivation and reward of

service staff are areas that need high priority in firms seeking to establish a competitive edge through service provision. Otis elevators recognized the importance of providing excellent service in the elevator businesses. They set up an OTISLINE through which customers can contact the firm's services 24 hours a day. The result has been significant increase in customer satisfaction levels Armistead and Clark (1992).

Differentiated benefit positioning strategy

Differentiated benefits positioning rests on clearly identifying alternative benefit segments within market and then focusing on providing what they want (Yanklovich & Meer 1996). It requires effective new product/service development skills to ensure that the benefits sought are actually delivered to customers through building in the relevant features. In the US Mouthwash market for example, Procter & Gamble successfully challenged market leader Listerine with their good-tasting Scope brand. Previously mouthwashes had tasted bad and customers assumed this was necessary for them to be effective. Scope was launched offering the additional benefit of taste (a mouthwash does not have to taste bad to be effective). Within a few years, Scope was level with Listerine in market share. In business-to-business as well as consumer markets, benefit segments provide a powerful basis on which to build positioning directly related to the requirement of customers.

Customized positioning (one-to-one marketing) strategy

Perhaps the ultimate in targeting and positioning is the attempt to offer products customized to the requirements of individual customers. The important skill for customized positioning are a combination of outside-in competencies to enable the firm to identify what the customer wants, and to establish relationships with customers, with inside-out competencies, of flexible production capability. Pine (1993) points out that the recent advances in 'mass customization' make it increasingly possible for firms to enjoy the cost and efficiency advantages of mass production while at the same time tailoring their offering, to individual customer requirements. Customized positioning rests on understanding individual, rather than market segment needs and having the flexibility to provide for them at a price the customer is willing to pay. An example of customized positioning can also be found

in services. Financial consultants offer tailored analysis of investment needs, hairdressers offer tailored haircuts.

Positioning by use or application

Often, positioning by use strategy represents a second or third position for the brand, a position that deliberately attempts to expand the brands market. Example is Gatorade, a summer beverage for athletes who need to replace body fluids. It has attempted to develop a positioning strategy for the winter months. The concept is to use Gatorade when flu attacks and the doctor say to drink plenty of fluids.

Positioning by product user

This strategy associates a product with a user or a class of users. The expectation is that the model or personality will influence the product's image by reflecting the characteristics and image of the model or personality communicated as a product user. Johnson and Johnson repositioned its shampoo from one used for babies to one used by people who wash their hair frequently and therefore need a mild shampoo. Their market share moved from 3% to 14%. Positioning by product class is another approach. Some products need to make critical positioning decisions that involve product class associations

Positioning by cultural symbols

The essential task is to identify something that is very meaningful to people that other competitors are not using and associate the brand with that symbol. Positioning by competitor strategy is another way of approach to positioning it is useful to consider positioning with respect to a competitor for two reasons. The competitor may have a firm, well crystallized image developed over many years. The competitors image can be used as a bridge to help communicate another image referenced to it. Second, sometimes it is not important how good customers think you are; it is just important that they believe you are better than (or perhaps as good as) a given competitor. Positioning with respect to a competitor can be accomplished by comparative advertising, in which a competitor is explicitly named and compared on one or more product characteristics.

2.5 Empirical literature on market positioning strategies

There is a lot of empirical literature on market positioning strategy. A study by Kalafatis et al (2000), positioning strategies in business markets using a cross sectional survey methodology in the USA, found that business positioning is predominantly determined by hard criteria e.g. product quality and relationship building factors e.g. personal contact, other considerations such as company structures i.e. geographical coverage, breadth of offerings and degree of integration i.e. location in the distribution chain, also play an important part. They concluded in their study that level of familiarity with a specific company is a contributing factor to the perceptions of the pursued positioning strategies.

A study by Dow (2001), the adaptation of host market positioning strategies, empirical evidence on Australian exporters in Australia using survey methodology found that domestically based Australian exporters tend to have a narrower focus and rely more heavily on operations based differentiation in foreign markets.

A study by Gary (2001), positioning, image and the marketing of multiple retailers using survey methodology in the UK found that retailers can compete on price and can insulate themselves from direct price competition through location. Alternatively, retailers can add value to the basic utility of place through appropriate marketing, through differentiated image, through positioning. Attribute was found to be the key positioning strategy in this study.

A study by Blank son et al (1999), Issues and challenges in the positioning of service brands, overview UK found that even in a tangible product there is some form of services attached to it. They concluded that in essence the degree of service in any product and vice versa are construed as raising challenges for marketers, trying to apply the positioning concept.

A study by Charles Blank son and Kalafatis (2004) the development and validation of scale measuring consumer/customer derived generic typology of positioning strategies in the UK using survey methodology found that eight distinct positioning strategies

emerged as follows (a) top of range (b) service (c) value for money (d) reliability (e) attractiveness (f) country of origin (g) brand name (h) selectivity.

A study by Doyle and Saunders (1985), market segmentation and positioning in specialized industrial markets in the UK and USA using cross sectional analysis found that the company's strategy has a significant impact on the market. There was positive performance for most of the companies that had chosen the right strategy.

A study by Bhat (1998), symbolic and functional positioning of brands using factor analysis methodology found that marketers do not necessarily have to position a brand as a prestige brand with its associations of expensiveness and exclusivity to tap the symbolic needs of consumers. In some instances a marketing mix that shows how the brand can be used to express a consumer personality or have some distinct meaning to a consumer would be cheaper, easier and more effective strategy than one that tries to position the brand on prestige and exclusivity.

A study by Hartmann et al (2005), Green branding effects on attitude Functional versus emotional positioning strategies, using factor analysis found that brand attitude; functional attributes and emotional benefits were the key factors in brand positioning which had positive impact on the brand.

A study by Truong et al (2009) New Luxury brand positioning and emergence of masstige brands, found that new Luxury brand positioning strategies often combine a high perceived prestige with reasonable price premiums in order to attract middle - class consumers. It was also found that these strategies are radically different from those implemented by traditional luxury brand owners, who maintain a consistency between perceived prestige and price premium so as to preserve their brands exclusivity. The study concluded that two brands under study had been impacted positively by the adoption of masstige positioning strategy.

A study by Lefebvre et al (1993) competitive positioning and innovative efforts in small and medium enterprises, found that there is a link between a firm's competitive positioning and its innovative efforts. In order to better understand the ground on which the firm has chosen to compete, smaller firms need to be constantly preoccupied with market signals if they wish to compete and even to survive.

A study by Rao (2009), a new paradigm for developing pharmaceutical positioning strategy found that positioning strategies based on a scientific, market driven paradigm will make for a commercialization process that effectively defines and communicates product value at every stage of the life cycle. Utilizing state of the art technique tools from disciplines such as strategic marketing research, marketing science and decision support sciences enables the process of translating such paradigm into effective strategy.

A study by Cornelia et al (1987), associative positioning strategies through comparative advertising, Attributes versus overall similarity approaches found direct comparative advertisements are superior in engendering overall brand positioning, where as only product based direct comparative advertisements are superior in engendering brand positioning at the attribute level, and only in terms of positioning clarity.

CHAPTER THREE: RESEARCH METHODOLOGY

3.1 Research Design

The survey research design was used to find out the positioning strategies that pharmaceutical companies use in Nairobi to cope with the increasing competition. A survey research seeks to obtain information that describes existing phenomena by asking individuals about their perceptions, attitudes, behaviour or values. Survey research is therefore a descriptive research and it is an excellent vehicle for the measurement of characteristics of large populations.

3.2 The population of study

The population of interest in this study consist of all pharmaceutical firms in Nairobi marketing medicines to doctors. Firms doing importation and then marketing in Kenya, as well as local manufacturers will be surveyed. According to Kenya medical directory 2009/2010, there are 112 firms in Nairobi.

3.3 Sample design

A sample size of fifty firms was selected for the study. Purposive sampling method was used to select the sample elements. This method allows use of cases that have the required information with respect to objectives of the study. Cases of subjects are therefore hand picked because they are informative, or they possess the required characteristics. The sampling item was the marketing manager or senior medical representative of the sampled pharmaceutical companies.

3.4 Data collection method

Primary data was collected using a structured and semi structured questionnaire. The study questionnaire was divided into two sections. Section I consisted questions aimed at getting the general information of the company. Section II contained questions that capture extent of use of the various positioning strategies by the pharmaceutical companies in Nairobi. The questionnaire was dropped and picked later.

3.5 Data analysis method

The data obtained in the field was coded and entered into a computer. Statistical programme for social sciences for analysis was used. This package aids in organising and summarising the data by the use of descriptive statistics. Descriptive statistics helps the researcher to meaningfully describe a distribution of scores or measurements using a few indices or statistics. Company background information was presented using frequency tables, and percentages, while the data on positioning strategies was presented using mean score and standard deviation. Further analysis of the data was done through cross tabulation of the background information. Ranking of the positioning strategies was obtained.

CHAPTER FOUR: DATA FINDINGS AND INTERPRETATION

4.1 Introduction

This chapter presents data analysis and findings of the questionnaires. Fifty firms were targeted out of which 37 responded. This was a response rate of 74%. The respondents were marketing managers or senior medical representatives of the various pharmaceutical companies. The findings are presented using frequency tables, mean scores and percentages. The chapter will be divided into two sections. The first section has the background information of the company. The second section has the analyzed data for the positioning strategies.

4.2 Background Information

Background information was based on the respondents' position in their respective organizations, duration the organization has been operating in Kenya as well as the ownership of the organization. The section also discusses the classifications of the products, origin of the organisations' brand as well as the continent of the origin of the brands.

4.2.1 Respondents position in the organization

Table 4.1 illustrates the respondent's position in their respective organizations. From the findings, majority (54.1%) of all the respondents were Senior Medical representatives while the remaining (45.9%) were Marketing Managers.

Respondent's position in the organization		
	Frequency	Percent
Marketing manager	17	45.9
Senior Medical representative	20	54.1
Total	37	100

Table 4. 1 Respondent's position in the organization

4.2.2 Duration the organisation has been operating in Kenya

According to the findings, majority (62.2%) of all the pharmaceutical companies had been operating in Kenya for over 10 years while 13.5% had been in the country for 6 to 10 years. Only 2.7% of the organizations had been operating in Kenya for less than 1 year as shown in the table below.

Duration the organization has been operating in Kenya		
	Frequency	Percent
Less than 1 year	1	2.7
1-5 years	8	21.6
6-10 years	5	13.5
Over 10 years	23	62.2
Total	37	100.0

Table 4.2: Duration the organization has been operating in Kenya

4.2.3 Type of ownership

Findings show that, 46% of all the organization were foreign owned while 27% were local firms. The remaining 27% were jointly locally and foreign owned

Type of ownership		
	Frequency	Percent
Local	10	27.0
Foreign	17	45.9
Joint (foreign and local)	10	27.0
Total	37	100.0

Table 4.3 Type of ownership

4.2.4 Classification of products

From the findings, majority of the pharmaceutical companies in Nairobi (64.9%) market branded generic medicines while the 35.1% of the companies market original brands as shown by the table below.

Classification of products		
	Frequency	Percent
Branded generics	24	64.9
Original brands	13	35.1
Total	37	100.0

Table 4. 4 Classification of products

4.2.5 Origin of the respondents' brand

The researcher was also interested in knowing the origin of the respondents' brand as illustrated by Table 4.5 .From the findings, majority (89.2%) of the respondents deal with imported brands while 10.8% locally manufacture their brands.

Origin of Respondents' Brands		
	Frequency	Percent
Locally manufactured	4	10.8
Imported	33	89.2
Total	37	100.0

Table 4.5 Origin of the respondents' brand

4.2.6 Continent of origin

The continent of origin of the pharmaceutical organization was also determined ,where it was determined that 50% of the companies in nairobi import their products from Asia.36% import from Europe. Those with their products originating from Africa are 11% and only 3% of the companies get their products from North America.

Continent of Origin		
	Frequency	Percent
Africa	3	8.1
Asia	18	50.0
Europe	14	37.8
North America	1	2.7
Total	37	100.0

Table 4.6 Continent of Origin

4.3. Positioning Strategies practised by pharmaceutical companies

The second part focuses on the positioning strategies employed by the said pharmaceutical companies to gain advantage over their competitors. The respondents were asked to indicate to what extent they used a given positioning strategy using a five point likert scale ranging from, 'very large extent' "5", 'large extent' "4", 'moderate extent' "3", 'small extent' "2", to 'no extent' "1". The results are presented as the mean of the respondent's that indicate that they used the strategy. Mean scores and standard deviations were used to analyze the data. A mean less than 1.49 indicates to no extent. A mean between 1.5 and 2.49 indicates small extent while mean falling between 2.5 and 3.49 is moderate. A mean between 3.5 and 4.49 indicates large extent and a mean greater than 4.5 indicates use of a given positioning strategy to a very large extent. On the other hand, a standard deviation of more than one means that the responses were varied to some extent while a lower (less than one) means that responses were similar. Where means are shared, the positioning with a lower standard deviation was considered the most commonly practised positioning strategy. The results are ranked based on their average mean score. The positioning strategy with the highest average mean score indicates the positioning strategy is the most commonly practised by the pharmaceutical companies.

4.3.1 Quality positioning strategy

Quality positioning strategy is practiced to a large extent with an average mean score of 4.44. Among the five factors used by the researcher, to determine quality positioning, registration of drugs by the pharmacy and poisons board is practiced to a very large extent (4.48). All drugs are tested for quality before registration for marketing. Drug manufacturing plants do follow the recommended good manufacturing practices by the world health organization to a large extent with a mean of 4.45. Packaging materials for the drugs are of high quality. Only 2.7% of the companies use low quality packaging. Providing product insert with clear directions on how to use the medicines is to a large extent with a mean of 4.31. To a large extent, transportation and storage of drugs meet the set standards.

Quality positioning strategy							
	No extent	Small Extent	Moderate extent	Large extent	Very large extent	Mean	MO Dev.
Our drugs are registered by pharmacy & poisons board			5.4	5.4	89.2	4.84	0.50
Our drug manufacturing source follows the WHO recommended good manufacturing practices(GMP)	5.4		5.0	21.6	67.6	4.45	1.04
Provides clear directions for reconstitution, dilution, and storage of drugs on the package insert	2.7		4.0	16.2	70.3	4.31	1.41
We use strong packaging material to safe guard the medicine	2.7	2.7	13.5	18.9	62.2	4.35	0.99
Transportation & storage of drugs meets set standards like use of refrigerators		5.4	5.4	21.6	62.2	4.24	1.30
Average Score	2.2	1.6	6.7	16.8	70.3	4.44	1.05

Table 4.7 Quality positioning strategy

4.3.2 Positioning by use /application strategy

Positioning by use or application strategy is practised to a large extent with an average mean score of 4.19. It is second most practised positioning strategy.

Positioning by use application strategy							
	No extent	Small Extent	Moderate extent	Large extent	Very large extent	Mean	Std Dev.
We use positioning by use /application to consolidate key messages of our brands in the customer's mind			24.3	32.4	43.2	4.19	0.80
Average Score			24.3	32.4	43.2	4.19	0.80

Table 4.8 Positioning by use /application strategy

4.3.3 Use of product characteristics positioning strategy

This strategy is practised to a large extent with an average mean score of 4.04. It ranks third. Six factors were used to investigate this strategy. Highlighting the benefits of the medicine to the customers is practised to a very large extent with a mean of 4.49. Convenient dosing schedules follows with a mean of 4.30. Drug safety with a mean of 4.22 is the third most practised characteristic communicated to the customers. Many drugs have convenient packaging and are easy to dispense with a mean of 4.11. There is a lot of variability in colour branding with some firms not using it at all and to a very large extent, only 29.7% of the firms use colours unique to their range of brands. The results are presented in the table below.

Use of productt	Extent					Average	Std Dev.
	No extent	Small Extent	Moderate extent	Large extent	Very large extent		
Our marketing communications highlights the benefits of the drugs Eg.fast resolution of symptoms etc	2.7		8.1	24.3	64.9	4.49	0.86
We emphasise drug's safety to the consumers		5.4	24.3	13.5	56.8	4.22	0.99
Drugs have convenient dosing schedules	2.7		13.5	32.4	51.4	4.30	0.90
We use colours to brand our drugs for identification by customers.	10.8	8.1	21.6	29.7	29.7	3.59	1.28
We highlight the features of drugs like size, film coating, amber colour etc compared to competitors	10.8	10.8	24.3	24.3	29.7	3.51	1.31
Packaging allows convenient dispensing and use by consumers		10.8	10.8	35.1	43.2	4.11	0.98
Average Score	4.5	5.9	17.1	26.6	45.9	4.04	1.05

Table 4.9 Use of product characteristics positioning strategy

4.3.4 Customized positioning

Customized positioning is practised to a large extent with an average mean score of 4.03. It is ranked fourth in practise by the pharmaceutical firms marketing medicines in Nairobi.

Customized positioning							
	No extent	Small Extent	Moderate extent			Mean	Std Dev.
			Large extent	Very large extent			
We customize our medicines to suit the needs of various types of patients	2.7	10.8	18.9	16.2	51.4	4.03	1.18
Average Score	2.7	10.8	18.9	16.2	51.4	4.03	1.18

Table 4.10: Customized positioning

4.3.5 Service positioning strategy

Service positioning strategy is practiced to a large extent and was ranked fifth in practice. Processing customer orders quickly with a mean of 4.11 is largely practised. Responding to customer requests adequately with a mean of 3.97, seeking to know customer complains and compliments, use of feedback to improve customer service are all practised to a large extent, the results are presented in the table below.

Service							
	No extent	Small Extent	Moderate extent	Large extent	Very large extent	Mean	Std Dev.
Responds to customers requests adequately.eg providing requested drug information or samples		5.4	27.0	32.4	35.1	3.97	0.92
Seek to know customer complains/compliments	5.4	5.4	27.0	37.8	24.3	3.70	1.06
Uses feedback to improve customer service	5.4	8.1	32.4	24.3	29.7	3.65	1.15
Average Score	3.4	5.4	26.3	31.8	33.1	3.80	1.03

Table:4.11 Service positioning strategy

4.3.6 Innovation positioning strategy

Innovation positioning strategy ranked sixth with a mean of 3.59 is practised to a large extent. The pharmaceutical companies do encourage and reward innovative employees to a large extent. Being quick to introduce new products in the market, adoption of new ways to marketing like use of information technology are both practised to a large extent.

Innovation positioning strategy							
	No extent	Small Extent	Moderate extent	Large extent	Very large, extent		Std Dev.
					Mean		
Fast to introduce new products in the market compared to our competitors		18.9	21.6	18.9	37.8	3.68	1.30
Quick to introduce and adopt new ways to marketing E.g. information technology etc	5.4	16.2	32.4	29.7	16.2	3.35	1.10
Encourages and rewards innovative employees	10.8	2.7	21.6	29.7	35.1	3.76	1.26
Average Score	5.4	12.6	25.2	26.1	29.7	3.59	1.22

Table 4.12 Innovation positioning strategy

4.3.7 Positioning by competitors

Positioning by competitor is practised to a moderate extent with an average mean of 3.33. of the three factors used investigate positioning by competitors, companies position their drugs as being better than those of competitors to a large extent. To a moderate extent, they position their drugs as being different from those of competitors with a mean of 3.46, while positioning medicines as being same competitors is least practiced with a mean of 2.73

Positioning by competitors							
	No extent	Small Extent	Moderate extent	Large extent	Very large extent	Mean	Std Dev.
Our drugs are same as competitors	18.9	32.4	18.9	16.2	13.5	2.73	1.31
Our drugs are better than competitors-to what extent	2.7	13.5	18.9	29.7	35.1	3.81	1.14
Our drugs are different from those of competitors	10.8	8.1	27.0	32.4	21.6	3.46	1.22
Average Score	10.8	18.0	21.6	26.1	23.4	3.33	1.22

Table 4.13: Positioning by competitors

4.3.8 Differentiated benefit positioning strategy

Differentiated benefit positioning strategy has an average mean score of 3.27 and is used to a moderate extent. Providing alternative ways of administering same drug like making the oral & injection form, offering same drug with different sizes and quantities, and good tastes in the oral drugs all had a similar mean of 3.41. They are equally practised to a large extent by pharmaceutical companies. Combining several molecules into one drug to lessen the burden of swallowing so many pills by a patient is practised only to a small extent.

	No extent	Small Extent	Moderate extent	Large extent	Very large extent	Mean	Std Dev.
Most of our drugs are combinations of various drugs to lessen the quantities to be swallowed or applied.	21.6	21.6	21.6	18.9	16.2	2.86	1.38
We provide alternative ways of administering same drug to accommodate various customer group e.g. oral & I.V	8.1	18.9	21.6	27.0	24.3	3.41	1.26
We offer same drug with different sizes and quantities	16.2	10.8	16.2	29.7	27.0	3.41	1.40
Oral drugs have good tastes	10.8	16.2	16.2	35.1	21.6	3.41	1.28
Average Score	14.2	16.9	18.9	27.7	22.3	3.27	1.33

Table 4.14: Differentiated benefit positioning strategy

4.3.9 Positioning by product user

This positioning strategy is practiced to a moderate extent. Many companies market drugs for adult patient with a mean of 3.46. To a small extent, pharmaceutical companies market paediatric drugs.

Positioning by product: user							
	No extent	Small Extent	Moderate extent	Large extent	Very large extent	Mean	Std Dev.
Most of our drugs are for adult patients	13.5	13.5	16.2	27.0	29.7	3.46	1.39
Most of our drugs are for paediatric patients	24.3	35.1	24.3	10.8	5.4	2.38	1.12
Average Score	18.9	24.3	20.3	18.9	17.6	2.92	1.26

Table 4.15: Positioning by product user

4.3.10 Use of cultural symbols to position

This strategy is practised to a moderate extent with a mean of 2.90.

Use of cultural symbols to position							
	No extent	Small Extent	Moderate extent	Large extent	Very large extent	Mean	Std Dev.
Associates drugs with symbols for easier identification by customers e.g. a picture of lungs on the pack of a cough syrup	21.6	16.2	35.1	10.8	16.2	2.84	1.33
Use symbols to enhance key messages of our medicines eg. Ferrari car to symbolize speed of action for the drug.	24.3	8.1	32.4	16.2	18.9	2.97	1.41
Average Score	23.0	12.2	33.8	13.5	17.6	2.90	1.3"

Table 4.16: Use of cultural symbols to position

4.3.11 Price positioning strategy

Price positioning strategy is practiced to a small extent by the pharmaceutical companies. Of the five factors asked, more for more positioning with mean of 3.03 is practised to a large extent. Kotler (2010) explains more for more as where a firm chooses to have highly priced products but of very high quality. More for same price positioning strategy, as well as more for less both have a mean of 2.22. They are practised to a small extent. However, more for less has a lesser standard deviation meaning it is more practised. Same for less price positioning strategy with a mean of 2.03 is practised to a small extent while less for much less positioning with a mean of 1.44 is not practised at all by any company.

Price positioning strategy							
	No extent	Small Extent	Moderate extent	Large extent	Very large extent	Mean	Std Dev
We have most expensive & highest quality drugs compared to competitors	8.1	16.2	51.3	13.5	10.8	3.03	1.03
Our drugs are same quality as competitors but we charge less	37.8	29.7	13.5	10.8	8.1	2.22	1.28
Low operations costs & our superior purchasing power allows us to sell same quantities as competitors but we charge less	45.9	27.0	10.8	10.8	5.4	2.03	1.22
Our drugs have reduced features e.g. cheaper packaging so we charge less.	67.6	27.0		5.5		1.44	0.76
Our drugs have more features and benefits than those of competitors but we charge less than them	35.1	29.7	18.9	10.8	5.4	2.22	1.19
Average Score	38.9	25.9	18.9	10.3	5.9	2.18	1.09

Table 4.17 Price positioning strategy

4.3.12 Product class positioning

The respondents were asked to choose the top three product classes by which their companies are recognized for by the market. Two product classes had similar responses. Gastro intestinal, cardiovascular system medicines were the two top most product classes. Drugs for the eye were the third as presented in the table below.

Products class positioning strategy			
	Frequency	Valid Percent	Percent of is
Gastrointestinal system	16	14.8	43.2
Cardio Vascular system	16	14.8	43.2
Eye	12	11.1	32.4
Respiratory system	10	9.3	27.0
Central nervous system	8	7.4	21.6
Skin	8	7.4	21.6
Infections	7	6.5	18.9
Endocrine system	6	5.6	16.2
Anaesthesia	6	5.6	16.2
Nutrition and blood	6	5.6	16.2
Musculoskeletal and joint	4	3.7	10.8
Ear nose and oral pharynx	4	3.7	10.8
Immunological products and vaccines	3	2.8	8.1
Malignant disease and immune suppression	1	0.9	2.7
Obstetrics/Gynaecologyand urinary tract	1	0.9	2.7

Table 4.18: Product class positioning

4.4. Cross tabulation of the respondent's background information with positioning strategies.

4.4.10 Origin of brand by the classification of medicines

Asia continent was the largest source of generic drugs with 75% originating from there. Europe produces most original brands at 83.3%. Only 16% of the generics are imported from Europe. No generic drug was from North America and the percent of the originals from there was only 8.33%, the few imports sold in Kenya are from South Africa and from Egypt.

Origin of brand by the classification		
Continent of Origin	Classification	
	Branded generics	Original brands
Africa	8.09	8.33
Asia	75.82	0.00
Europe	16.09	83.33
North America	0.00	8.33
Total	100.00	100.00

Table 4.19: Origin of brand by the classification

4.4.2 Positioning by use/application by classification of medicines

Fifty percent of companies selling branded generics use positioning by use to a very large extent. Only 30.77 % of the companies marketing original brands use positioning by use or application to a very large extent

Positioning by use/application by Classification of products		
Positioning by use	Classification of products	
	Branded generics	Original brands
To a small extent	0.00	7.69
To a moderate extent	20.83	23.08
To a large extent	29.17	38.46
To a very large extent	50.00	30.77
Total	100.00	100.00

Table 4.20: positioning by use/application by classification of products.

4.4.3 Customized positioning by Classification of products

The original brands companies use customised positioning to a very large extent. This may be attributed to the fact that they are able to research and develop new drugs. They have unique products.

Customized positioning by Classification of products		
Customized positioning	Classification of products	
	Branded generics	Original brands
To no extent	8.33	0.00
To a small extent	16.67	0.00
To a moderate extent	16.67	15.38
To a large extent	16.67	15.38
To a very large extent	41.67	69.23
Total	100.00	100.00

Table 4.21: Customized positioning by Classification of products

4.4.4 Ranking of the various positioning strategies

With highest mean representing the most practised positioning strategy, ranking was done.

Sn No.	Positioning strategy	Mean	Std deviation
1.	Quality positioning strategy	4.44	1.05
2.	Positioning by use or application	4.19	0.80
3.	Use of product characteristics	4.04	1.05
4.	Customized positioning	4.03	1.18
5.	Service positioning strategy	3.86	1.03
6.	Innovation positioning strategy	3.59	1.22
7.	Positioning by competitors	3.33	1.22
8.	Differentiated benefit positioning strategy	3.27	1.33
9.	Positioning by product user	2.92	1.26
10.	Use of cultural symbols positioning strategy	2.90	1.37
11.	Price positioning strategy	2.18	1.09

Table 4.22 Ranking of the various positioning strategies

CHAPTER FIVE: DISCUSSION, CONCLUSIONS AND RECOMEDDATIONS

5.1 Introduction

This chapter gives a summary of the discussions, conclusions and recommendations, based on the findings from the study. The objective of the study was to investigate market positioning strategies practised by pharmaceutical firms marketing medicines in Nairobi .A survey of the pharmaceutical firms in Nairobi was carried out.

5.2 Discussions

The research study found out that majority of companies had been operating in Kenya for over 10 years , findings also showed that, about half of all companies were foreign owned, Majority of the pharmaceutical companies deal with branded generics while less than half market original brands. The study also revealed that imported brands constitute over three quarters of the drugs in the market. Half of these imports are from Asia while about a third of the imports are from Europe. Those with their products originating from Africa are few.

The findings from the study showed that there are a number of positioning strategies practised by the pharmaceutical companies in Nairobi. They are discussed in order of their ranking from the most common in practise to the least common. Quality positioning strategy was the most practised strategy. This may be due to the fact that every company wants its company to be viewed as selling high quality medicines. That is why most drugs marketed in Kenya are registered by the pharmacy and poisons board. The board regulates the sale of medicines in Kenya. Drug manufacturing plants follow the recommended good manufacturing practices by the world heath organization. Majority of the firms provides product insert with clear directions on how to use the medicines. Transportation and storage standards are also high and therefore the quality of the medicines may be considered as high. Second in practise is positioning by use or application strategy by all companies the medical sales representatives of these firms carry brochures containing messages on positioning by use. These leaflets are placed in the doctors' room for constant reminders on the use or application of the medicine. Use of product characteristics positioning strategy was also found to be common. A company which regularly

highlight the features and the benefits of their medicines to the customers may perform better than completion since customers will seek a drug containing the benefits they seek.

Customized positioning is also very widely used with a mean of 4.03. Only one respondent mentioned that they do not use it at all. Customizing medicines to meet the various needs of customers was ranked fourth in practice. Some pharmaceutical companies have very unique types of medicines for treating many kinds of diseases. Service positioning strategy is the fifth commonest positioning strategy. It includes quick processing of customer orders, responding to customer requests adequately, seeking to know customer complaints and compliments and the use of feed back to improve customer service. Encouraging and rewarding innovative employees, being quick to introduce new products and the adoption of new ways to marketing as use of information technology is also commonly practiced. Innovative companies have a competitive advantage in the market and hence the practice of the pharmaceutical companies positioning themselves as innovative.

Many companies position their drugs to be better than those of competitors'. They also position their drugs as different from those of competitors. Differentiated benefit positioning strategy like making oral and injection form of the same drug, offering same drug with different sizes and quantities, are equally important positioning strategies and are adopted by many pharmaceutical companies. Combining several molecules into one drug to lessen the burden of swallowing so many pills by a patient is not widely practiced. Use of cultural symbols and positioning by price are the least practised.

5.3 Conclusions

The findings indicate that pharmaceutical companies do practice positioning strategies. The extent varies but in common, all companies like to be viewed as providing high quality medicines to the patients. Majority of the drugs imported from Asia are generic medicines. Price positioning strategy is the least practised by the pharmaceutical industries. Most pharmaceutical firms consider quality of the drugs as

very important. The pharmacy and poisons board of Kenya has registered many drugs, which pass the set quality standards.

5.4 Recommendations

While the sale and marketing of medicines is regulated by the government, it is advisable for the pharmaceutical companies to become more innovative and embrace modern technology in marketing. Pharmaceutical companies should regularly monitor the position of their brands in the mind of their consumers relative to the competitors. Where necessary, they may reposition the drug to gain competitive advantage.

5.5 Limitations of the study

Some of the respondents did not return the questionnaires even after follow ups on phone. 50 questionnaires were issued but only 37 were returned.

5.6 Suggestions for further research

Future studies should attempt to explore the limited practise of price positioning strategy by the pharmaceutical companies. Further studies should be done to establish whether positioning of medicines in the mind of the customers influences drug choice. Researchers might also attempt to plot positioning maps for various drugs marketed by the pharmaceutical companies in Nairobi.

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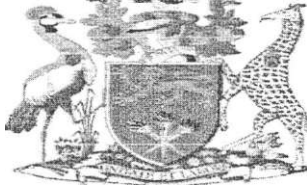
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APPENDICES

Appendix I

II- , J



LETTER OF INTRODUCTION

Newton Njeru

Telephone No: 0721468857/0734 468857

School of Business

University of Nairobi

13th September 2010

Dear Respondent,

The above named is a postgraduate student (MBA) at the University of Nairobi conducting a research on **"Market Positioning Strategies practiced by Pharmaceutical firms marketing medicines in Nairobi"**.

Your company has been selected to form part of this study. You are faithfully requested to complete the attached questionnaire.

Information collected is for academic purpose and will be treated in confidence. Your name or that of your company will not be mentioned in the research. A copy of the research project will be availed to you upon request.

Yours faithfully

Newton I Njeru

Supervisor Mrs. Mary Kinoti

Appendix II

THE STUDY QUESTIONNAIRE

SECTION ONE: General information

1. Name of your organization.

2. Your position in the company

3. How long has your organization been operating in Kenya
 - Less than 1 year
 - 1-5 years
 - 6-10 years
 - Over 10 years

4. Type of ownership
 - Local
 - Foreign
 - Joint (foreign & local)

5. Your products are classified as
 - Branded generics
 - Original brands

6. Origin of your brands
 - Locally manufactured
 - Imported

7. If imported, which is the continent(s) of origin
 - Africa
 - Asia
 - Europe
 - Australia
 - North America
 - Latin America

SECTION TWO: positioning strategies

Indicate by a tick [V] the extent to which your company practices the positioning strategies listed in the table below using a scale of 1 to 5 where,

1-to no extent 2-to a small extent 3-to a moderate extent

4-to a large extent 5-to a very large extent

	Extent				
Use of product characteristics positioning strategy	1	2	3	4	5
Our marketing communications highlights the benefits of the drugs Eg.fast resolution of symptoms etc					
We emphasise drug's safety to the consumers					
Drugs have convenient dosing schedules					
We use colours to brand our drugs for identification by customers.					
We highlight the features of drugs like size, film coating, amber colour etc compared to competitors					
Packaging allows convenient dispensing and use by consumers					
Price positioning strategy					
We have most expensive & highest quality drugs compared to competitors					
Our drugs are same quality as competitors but we charge less					
Low operations costs & our superior purchasing power allows us to sell same quantities as competitors but we charge less					
Our drugs have reduced features e.g. cheaper packaging so we charge less.					
Our drugs have more features and benefits than those of competitors but we charge less than them					
Quality positioning strategy					
Our drugs are registered by pharmacy & poisons board					

Our drug manufacturing source follows the WHO recommended good manufacturing practices(GMP)					
Provides clear directions for reconstitution, dilution, and storage of drugs on the package insert					
We use strong packaging material to safe guard the medicine					
Transportation & storage of drugs meets set standards like use of refrigerators					
Innovation positioning strategy					
Fast to introduce new products in the market compared to our competitors					
Quick to introduce and adopt new ways to marketing E.g. information technology etc					
Encourages and rewards innovative employees					
Service positioning strategy					
Customer orders are quickly processed and delivered					
Responds to customers requests adequately.eg providing requested drug information or samples					
Seek to know customer complains/compliments					
Uses feedback to improve customer service					
Differentiated benefit positioning strategy					
Most of our drugs are combinations of various drugs to lessen the quantities to be swallowed or applied.					
We provide alternative ways of administering same drug to accommodate various customer group e.g. oral & I.V					
We offer same drug with different sizes and quantities					
Oral drugs have good tastes					
Positioning by product user					
Most of our drugs are for adult patients					
Most of our drugs are for paediatric patients					
Use of cultural symbols to position					

Associates drugs with symbols for easier identification by customers e.g. a picture of lungs on the pack of a cough syrup					
Use symbols to enhance key messages of our medicines eg.Ferrari car to symbolise speed of action for the drug.					
Positioning by competitors					
Our drugs are same as competitors - to what extent					
Our drugs are better than competitors-to what extent					
Our drugs are different from those of competitors					

Products class positioning strategy

Tick the top three product classes by which your company is recognized for.

- Gastrointestinal system [] Cardio vascular system [] Eye []
 Respiratory system [] Central nervous system [] Skin []
 Infections [] Endocrine system [] Anaesthesia []
 Nutrition and Blood [] Musculoskeletal and Joint []
 Ear Nose and Oral pharynx []
 Immunological products & vaccines []
 Malignant disease & immune suppression []
 Obstetrics/Gynaecology & Urinary tract disorders []

Positioning by use or application

A product image can be communicated by associating it with a use or application.

Examples below are general, mainly contained in the Leave behind literatures (LBCs) and attempt to explain positioning by use.

- a) Drug X -the pneumonia expert.
- b) Drug Y -effectively targets the tumour
- c) Drug Z -targets anaerobes
- d) Drug XY -the power and safety in pain and inflammation therapy

Indicate by a tick [V] the extent to which your company practices the positioning by use or application strategy using a scale of 1 to 5 where,

1-to no extent 2-to a small extent 3-to a moderate extent
4-to a large extent 5-to a very large extent

Positioning by use /application strategy	1	2	3	4	5
We use positioning by use /application to consolidate key messages of our brands in the customer's mind					

Customized positioning (one-to one) strategy

Perhaps the ultimate in targeting and positioning is the attempt to offer products customized to the requirements of individual customers.

Indicate by a tick [V] the extent to which your company practices the positioning by one-to one strategy using a scale of 1 to 5 where,

1-to no extent 2-to a small extent 3-to a moderate extent
4-to a large extent 5-to a very large extent

Customised positioning	1	2	3	4	5
We customize our medicines to suit the needs of various types of patients					

Appendix III

List of pharmaceutical companies in Nairobi

- 1 Abaccus pharma (Africa) ltd
- 2 Accord health care (k) ltd
- 3 Ace pharmaceuticals ltd
- 4 Aim international pharmaceutical ltd
- 5 Armicon pharmaceuticals ltd
- 6 Astrazeneca
- 7 Autosterile (EA) ltd
- 8 Bayer East Africa ltd
- 9 Beijing Holey- cotec.co.ltd
- 10 Beta health care international
- 11 Biodeal laboratories ltd
- 12 Bio- medical laboratory ltd
- 13 Boehringer ingelhem
- 14 C.mehta & company ltd
- 15 Cadila pharmaceuticals (EA) ltd
- 16 Comet Healthcare ltd
- 17 Cosmos ltd
- 18 Dawa pharmaceuticals ltd
- 19 Depopharma ltd
- 20 Deutsche healthcare (k) ltd
- 21 Elys chemical industry ltd
- 22 Eurox pharmaceuticals ltd
- 23 Europa Healthcare ltd
- 24 FAW pharmaceuticals ltd
- 25 Framin Kenya ltd
- 26 Fresenius Kabi Deutschland GmbH
- 27 Galaxy pharmaceuticals ltd
- 28 Gesto pharmaceuticals ltd
- 29 GlaxosmithKline
- 30 Glenmark pharmaceuticals ltd
- 31 Globe pharmacy ltd
- 32 Global Net Medical ltd
- 33 Goodman Agencies ltd
- 34 Haripharm pharmaceuticals ltd
- 35 Harleys limited
- 36 Healthcare Direct (K) ltd
- 37 Highchem pharmaceuticals ltd
- 38 Highridge Pharmacy wholesalers ltd
- 39 Infusion Kenya ltd
- 40 IPA Laboratories ltd
- 41 Isis Africa ltd
- 42 Jaskam & company ltd
- 43 Jos.Hansen & Soehne (EA) ltd
- 44 Kam pharmacy (wholesale)ltd.
- 45 Ken-Bangla pharmaceuticals ltd
- 46 Kruger Kent pharmaceuticals
- 47 Kulal international ltd

48 Laboratory and allied ltd
49 Laborex Kenya ltd
50 Laxcon pharmaceuticals ltd
51 Leo pharmaceuticals
52 Lords health care ltd
53 Lukim pharmaceuticals Agencies ltd
54 Ms pharma
55 Mac Lawrence pharmaceuticals co ltd
56 Mac Naughton ltd
57 Madawa pharmaceuticals ltd
58 Manhar Brothers (k) ltd
59 Medivet products ltd
60 Medox pharmaceuticals ltd
61 Metro pharmaceuticals ltd
62 Mission for essential drugs and supplies ltd
63 Modu pharma
64 Monks medicare Africa ltd
65 Nairobi medical stores
66 Nairobi pharmaceuticals (K)ltd
67 Nila pharmaceuticals ltd
68 Njimia pharmacy
69 Norbrok (K) ltd"
70 Novartis pharma services
71 Novelty manufacturing ltd
72 Omaera pharmaceuticals ltd
73 Pan Pharmaceuticals ltd
74 Pfizer laboratories ltd
75 Pharma access Africa
76 Pharma specialities
77 Pharma vision ltd
78 Pharmaceutical manufacturing .co (k) ltd
79 Phillips pharmaceuticals ltd
80 Ranbaxy Laboratorie Ltd
81 Radiance pharmaceuticals ltd
82 Rangechem pharmaceuticals Ltd
83 Ray pharmaceuticals Ltd
84 Regal pharmaceuticals Ltd
85 Roche products Ltd
86 Rup-pharm ltd
87 Saicare Enterprises Ltd
88 Sai pharmaceuticals ltd
89 SanofiAventis
90 Sanofi Pasteur
91 Samba pharmaceuticals Ltd
92 Sky pharmacy Ltd
93 Sphinx pharmaceuticals Ltd
94 Statim pharmaceuticals Ltd
95 Sunny land pharmaceuticals Ltd
96 Sunpar pharmaceuticals Ltd
97 Surgilinks ltd

98 Svnerchemie Ltd
99 Syner-Med pharmaceuticals (k)
100 Temple stores pharmaceuticals
101 Transchem pharmaceuticals Ltd
102 Transwide pharmaceuticals
103 Trinity pharma Ltd
104 Twokay chemicals ltd
105 Unisell pharma(K)ltd
106 Unisupplies and marketing (k) Ltd
107 Universal pharmacy
108 Veteran pharmaceuticals ltd
109 Wessex pharmaceuticals Ltd
110 Wellmed pharmaceuticals Ltd
111 Wockaine (INT) Ltd
112 Zadchem pharmacy ltd