Media & communication audit to identify current advertising /marketing trends and spends, messaging and landscape

7th April 2009
Contents

• Media Landscape

• Identification, evaluation of existing materials, messages, and media outlets with reference to feeding practices, infant formula, and other nutrition products

• Role of mass media in the advertising/marketing of feeding practices, infant formula and foods, and other nutrition products

• Appendix
Population data

2008 population: 86.1m

Male: Female = 49:51

Urban: Rural = 27:73

Top 6 cities*) = 43% of urban pop.

Median age: 27 years

Literacy: 90%

Vietnam’s population is young and is a growing middle class society

15-45s account for over half the current total population of 86m
Vietnam’s median age is currently 27

<table>
<thead>
<tr>
<th>Age Group</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt; 65</td>
<td>6</td>
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<tr>
<td>65-64</td>
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<tr>
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<tr>
<td>15-24</td>
<td>22</td>
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<tr>
<td>&lt; 15</td>
<td>26</td>
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</table>


Nearly 40% of households in Vietnam’s 6 biggest cities belong to AB class

<table>
<thead>
<tr>
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<td>2013</td>
<td>9</td>
<td>16</td>
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<td>2007</td>
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<td>18</td>
</tr>
<tr>
<td>2003</td>
<td>6</td>
<td>15</td>
<td>36</td>
<td>23</td>
<td>21</td>
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</tbody>
</table>

Change in Methodology / Definition of SEC durable asset ownership
Advertising spends
For 2008, there is an increase of 23% vs. 2007. This was caused by both media inflation and real growth. Media inflation is the increase of rates by TV stations on year which in turn will inflate the total spending of players. Real growth is driven by entry of new players or new brands in the market.
Top ten category spenders 08 vs 07

<table>
<thead>
<tr>
<th>Category</th>
<th>2008</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telecom Operator</td>
<td>838</td>
<td></td>
</tr>
<tr>
<td>Milk Products</td>
<td>441</td>
<td></td>
</tr>
<tr>
<td>Hair Care</td>
<td>191</td>
<td></td>
</tr>
<tr>
<td>Telecoms Equipment</td>
<td>181</td>
<td></td>
</tr>
<tr>
<td>Laundry &amp; Detergent</td>
<td>167</td>
<td></td>
</tr>
<tr>
<td>Dermatology</td>
<td>160</td>
<td></td>
</tr>
<tr>
<td>Facial Care</td>
<td>159</td>
<td></td>
</tr>
<tr>
<td>Banking</td>
<td>155</td>
<td></td>
</tr>
<tr>
<td>SMS &amp; Interactive Game</td>
<td>120</td>
<td></td>
</tr>
<tr>
<td>Traditional &amp; Herbal</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

Source: TNS

All reported spends are gross spends, not accounting for discounts and not inclusive of 10% VAT.
Top ten brands 08 vs 07

- TICARLOX (Skin care & Dim Scar gel): 98
- MOBIFONE (Mobile Network Operator): 95
- VINAPHONE (Mobile Network Operator): 60
- OMO (Detergent): 54
- COMFORT (Fabric Conditioner): 53
- CICATREX (Quick Healing Broken Skin Gel): 45
- SUNSILK (Shampoo): 38
- SAMSUNG (Mobile Phone): 37
- POND'S (Skin Whitening Products): 35
- ENFAGROW (Growing-up Milk Powder): 35

Source: TNS

All reported spends are gross spends, not accounting for discounts and not inclusive of 10% VAT.
Media in Vietnam
Almost every household has a TV in Vietnam. Ownership of PCs is overtaking Radio ownership.
Media Penetration

- TV & Print are the main reach drivers in the market
- Internet has seen a strong increase over last year

Source: TNS Galileo
Target: M18-45 ABCD
TV maintains its leadership in reach across all SECs
TV update
There are 100+ TV stations in Vietnam

However, with just three stations we can achieve threshold coverage (70-80%) of the country:-
VTV, HTV and Vinh Long

There are several other strong provincial stations which get higher ratings than the above 3 national/regional networks
Cable penetration is growing rapidly
Cable TV viewership steadily rising

Source: TNS Target: M18-45 ABCD
Top channel viewing showing accurate ratings due to change from diary to peoplemeter reporting

HCM Diary (FY2008)

HCM PM (Aug 08-Jan 09)

Source: TNS Target: M18-45 ABCD
Print
## Top Magazines and Newspapers

<table>
<thead>
<tr>
<th>No</th>
<th>Publication</th>
<th>Claimed readers %</th>
<th>Regular readers %</th>
<th>Periodicity</th>
<th>Center of Interest</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Tuoi Tre Newspaper</td>
<td>31.6</td>
<td>21.7</td>
<td>Daily</td>
<td>General</td>
</tr>
<tr>
<td>2</td>
<td>Cong An TP HCM Newspaper</td>
<td>31.2</td>
<td>24.3</td>
<td>2 weekly</td>
<td>Society</td>
</tr>
<tr>
<td>3</td>
<td>Thanh Nien Newspaper</td>
<td>24.0</td>
<td>15.6</td>
<td>Daily</td>
<td>General</td>
</tr>
<tr>
<td>4</td>
<td>Tiep Thi &amp; Gia Dinh (Weekly) Magazine</td>
<td>20.9</td>
<td>15.2</td>
<td>Weekly</td>
<td>Women &amp; Life Style</td>
</tr>
<tr>
<td>5</td>
<td>An Ninh The Gioi Newspaper</td>
<td>18.9</td>
<td>12.6</td>
<td>2 weekly</td>
<td>Society</td>
</tr>
<tr>
<td>6</td>
<td>Cong An TP HCM Magazine</td>
<td>18.2</td>
<td>14.0</td>
<td>Weekly</td>
<td>Society</td>
</tr>
<tr>
<td>7</td>
<td>The Gioi Phu Nu (TP HCM) Magazine</td>
<td>17.4</td>
<td>11.5</td>
<td>Weekly</td>
<td>Women &amp; Life Style</td>
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<tr>
<td>8</td>
<td>The Yellow Pages</td>
<td>16.4</td>
<td>16.4</td>
<td>Annual</td>
<td>Directory</td>
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<tr>
<td>9</td>
<td>Bong Da Newspaper</td>
<td>14.6</td>
<td>8.5</td>
<td>Daily</td>
<td>Sport</td>
</tr>
<tr>
<td>10</td>
<td>Tuoi Tre Cuoi Magazine</td>
<td>12.3</td>
<td>5.9</td>
<td>2 monthly</td>
<td>Society</td>
</tr>
<tr>
<td>11</td>
<td>Hoa Hoc Tro Magazine</td>
<td>11.4</td>
<td>8.7</td>
<td>Weekly</td>
<td>Student</td>
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<tr>
<td>12</td>
<td>Cong An Nhan Dan Newspaper</td>
<td>11.1</td>
<td>3.9</td>
<td>Daily</td>
<td>Society</td>
</tr>
<tr>
<td>13</td>
<td>Hanh Phuc Gia Dinh (Phu Nu VN) Magazine</td>
<td>10.3</td>
<td>6.5</td>
<td>Weekly</td>
<td>Women &amp; Life Style</td>
</tr>
<tr>
<td>14</td>
<td>An Ninh Thu Do Newspaper</td>
<td>10.1</td>
<td>4.9</td>
<td>Daily</td>
<td>Society</td>
</tr>
<tr>
<td>15</td>
<td>Dat Mui Cuoi Tuan Magazine</td>
<td>9.7</td>
<td>5.6</td>
<td>Weekly</td>
<td>Entertainment</td>
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<tr>
<td>16</td>
<td>Tuoi Tre Cuoi Tuan Magazine</td>
<td>9.2</td>
<td>7.2</td>
<td>Weekly</td>
<td>Culture</td>
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<tr>
<td>17</td>
<td>Phu Nu Chu Nhat Magazine</td>
<td>8.4</td>
<td>6.2</td>
<td>Weekly</td>
<td>Women &amp; Life Style</td>
</tr>
</tbody>
</table>

Source: TNS–Galileo Wave 1 2006
Top Magazines and newspapers

HCMC

Top newspaper titles are Tuoi Tre, Cong An and Thanh Nien while top magazines are Tiep Thi Gia Dinh and The Gioi Phu Nu.

Central and Mekong Delta

Readership is much lower in these areas and dominated by only the following titles Cong An HCMC, Tuoi Tre, The Gioi Phu Nu and Tiep Thi & Gia Dinh.

Hanoi

Top newspaper titles are An Ninh Thu Do, An Ninh The Gioi, Hanh Phuc Gia Dinh, and Bong Da.
# Top Magazines and Newspapers

<table>
<thead>
<tr>
<th>Magazines / Newspapers</th>
<th>Categories</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cong An HCMC</td>
<td>Police / politics</td>
</tr>
<tr>
<td>Tuoi Tre / Thanh Nien</td>
<td>General publics</td>
</tr>
<tr>
<td>Tiep Thi &amp; Gia Dinh</td>
<td>Family (target women)</td>
</tr>
<tr>
<td>The Gioi Phu Nu</td>
<td>Family (target women)</td>
</tr>
<tr>
<td>An Ninh The Giao</td>
<td>Politics</td>
</tr>
<tr>
<td>An Ninh Thu Do</td>
<td>Politics</td>
</tr>
<tr>
<td>Hanh Phuc Gia Dinh</td>
<td>Family (target women)</td>
</tr>
<tr>
<td>Bong Da</td>
<td>Sport (target men)</td>
</tr>
</tbody>
</table>
Internet
<table>
<thead>
<tr>
<th>Country</th>
<th>Internet Penetration (%)</th>
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</thead>
<tbody>
<tr>
<td>Vietnam</td>
<td>23.4%*</td>
</tr>
<tr>
<td>Thailand</td>
<td>20.5%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>59.0%</td>
</tr>
<tr>
<td>Singapore</td>
<td>58.6%</td>
</tr>
<tr>
<td>Brunei</td>
<td>46.2%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>10.5%</td>
</tr>
<tr>
<td>Laos</td>
<td>1.5%</td>
</tr>
<tr>
<td>Cambodia</td>
<td>0.5%</td>
</tr>
<tr>
<td>Myanmar</td>
<td>0.1%</td>
</tr>
</tbody>
</table>

Vietnam has one of the highest penetration of Internet Users in South East Asia and – with over 20m users – accounts for over 1.4% of the world’s 1.46 billion internet users.

Source: Internet World Statistics (IWS) 2008

* As at Jun 2008; the current figure is 24.2%
Internet Usage Penetration of Vietnam’s Population

<table>
<thead>
<tr>
<th>Year End Totals</th>
<th>No. of Users</th>
<th>% YoY growth</th>
</tr>
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<tbody>
<tr>
<td>2003</td>
<td>3,098,007</td>
<td></td>
</tr>
<tr>
<td>2004</td>
<td>6,345,049</td>
<td>+105%</td>
</tr>
<tr>
<td>2005</td>
<td>10,710,980</td>
<td>+ 69%</td>
</tr>
<tr>
<td>2006</td>
<td>14,683,783</td>
<td>+ 37%</td>
</tr>
<tr>
<td>2007</td>
<td>18,551,409</td>
<td>+ 26%</td>
</tr>
</tbody>
</table>

Latest figure: Nov 2008 – 20,669,285 (24.20% of the population)

Source: VNNIC
Gaming is a national phenomenon

Estimated 2m gamers, spending up to USD 10 per month at internet cafes and up to USD 50 per year on new games, upgrades and online trading.

Games developed in China and Korea are the most popular, e.g. Swordsman Online, which was so popular at one time that the government considered banning new accounts as users were overloading the internet infrastructure.
Cinema’s urban revival

Slow but steady growth of multi-screen halls in key cities

Frequency of cinema going

Cinemas in 4 cities
Gap between international and local release dates is reducing to 2-4 weeks

<table>
<thead>
<tr>
<th>Film</th>
<th>Genre</th>
<th>Studio</th>
<th>Running</th>
<th>US Release</th>
<th>VN Release</th>
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</thead>
<tbody>
<tr>
<td>NARNIA 2: PRINCE CASPIAN</td>
<td>Adventure</td>
<td>WDS</td>
<td>145</td>
<td>16-May-08</td>
<td>30-May-08</td>
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<tr>
<td>INDIANA JONES 4</td>
<td>ActAdv</td>
<td>PAR</td>
<td>122</td>
<td>22-May-08</td>
<td>13-Jun-08</td>
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<tr>
<td>NEVER BACK DOWN</td>
<td>Action</td>
<td>SUMMIT</td>
<td>113</td>
<td>14-Mar-08</td>
<td>20-Jun-08</td>
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<td>KUNGFU PANDA</td>
<td>Comedy</td>
<td>DRE</td>
<td>90</td>
<td>06-Jun-08</td>
<td>27-Jun-08</td>
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<tr>
<td>INCREDIBLE HULK 2</td>
<td>Sci/iAct</td>
<td>UNI</td>
<td>114</td>
<td>13-Jun-08</td>
<td>4-Jul-08</td>
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<tr>
<td>WALL E</td>
<td>Sci/Ani</td>
<td>WDS</td>
<td>90</td>
<td>27-Jun-08</td>
<td>11-Jul-08</td>
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<tr>
<td>WANTED</td>
<td>Action</td>
<td>UNI</td>
<td>108</td>
<td>27-Jun-08</td>
<td>18-Jul-08</td>
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<tr>
<td>RED CLIFF</td>
<td>Act/History</td>
<td>SUMMIT</td>
<td>143</td>
<td>10-Jul-08</td>
<td>25-Jul-08</td>
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<td>HELLBOY 2</td>
<td>Sci/iAct</td>
<td>UNI</td>
<td></td>
<td>11-Jul-08</td>
<td>1-Aug-08</td>
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<tr>
<td>MUMMY 3</td>
<td>ActAdv</td>
<td>UNI</td>
<td></td>
<td>01-Aug-08</td>
<td>15-Aug-08</td>
</tr>
<tr>
<td>SARKAR RAJ (Big Boss)</td>
<td>Thriller</td>
<td>INDIA</td>
<td>120</td>
<td>06-Jun-08</td>
<td>22-Aug-08</td>
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<td>LOVE GURU</td>
<td>Comedy</td>
<td>PAR</td>
<td></td>
<td>20-Jun-08</td>
<td>29-Aug-08</td>
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<tr>
<td>MAMMA MIA</td>
<td>RomCom</td>
<td>UNI</td>
<td></td>
<td>18-Jul-08</td>
<td>12-Sep-08</td>
</tr>
<tr>
<td>DEATH RACE</td>
<td>Sci/iAct</td>
<td>UNI</td>
<td></td>
<td>22-Aug-08</td>
<td>19-Sep-08</td>
</tr>
<tr>
<td>ANGUS, THONGS</td>
<td>Drama/Com</td>
<td>PAR</td>
<td></td>
<td>18-Jul-08</td>
<td>3-Oct-08</td>
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<tr>
<td>EAGLE EYE</td>
<td>Thriller</td>
<td>PAR</td>
<td></td>
<td>26-Sep-08</td>
<td>10-Oct-08</td>
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<td>TROPIC THUNDER</td>
<td>ActCom</td>
<td>PAR</td>
<td></td>
<td>15-Aug-08</td>
<td>24-Oct-08</td>
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<td>WILD CHILD</td>
<td>RomCom</td>
<td>UNI</td>
<td></td>
<td>15-Aug-08</td>
<td>20-Nov-08</td>
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<td>HIGH SCHOOL MUSICAL 3</td>
<td>Musical</td>
<td>BVI</td>
<td></td>
<td>24-Oct-08</td>
<td>28-Nov-08</td>
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<td>GHOST TOWN</td>
<td>RomCom</td>
<td>DRE</td>
<td></td>
<td>19-Sep-08</td>
<td>12-Dec-08</td>
</tr>
<tr>
<td>CITY OF EMBER</td>
<td>Adventure</td>
<td>SUMMIT</td>
<td></td>
<td>10-Oct-08</td>
<td>12-Nov-08</td>
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<tr>
<td>THE UNINVITED</td>
<td>Horror</td>
<td>DRE</td>
<td></td>
<td>24-Oct-08</td>
<td>19-Dec-08</td>
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<td>MADAGASCAR 2</td>
<td>Animation</td>
<td>DRE</td>
<td></td>
<td>07-Nov-08</td>
<td>26-Dec-08</td>
</tr>
</tbody>
</table>
In summary

- Rapidly change consumer behavior, now also influenced by volatile economy

- TV clutter increasing due to increase in cable connection and growth of cable channels; this and the growth of internet are impacting program ratings;

- Entry of Peoplemeter will further change the dynamics of TV ratings measurements

- Digital: rapid growth and high awareness of advertising potential; inflation and clutter are catching up and digital campaigns now need to have ‘digital 360’

- Cinema: Number of cinema halls/multiplex are increasing slowly; sponsorship opportunities

- OOH: Pricing increase in 2008, not supported by any improvement in infrastructure
Implications for IFT players

- TV remains the main channel for communication thanks to the 99% household penetration nationwide.

- This is followed by print whose impact and influence is strong in HCMC and Hanoi.

- Internet is a medium that has seen tremendous growth particularly the younger target audience (late teens and young adults)

- Cost of radio is competitive but remains largely a medium for rural due to lack of drive time and programming.
Identification, evaluation of existing materials, messages, and media outlets with reference to feeding practices, infant formula, and other nutrition products
Methodology

This section will provide an analysis of the materials from two perspectives.

1. Advertising expenditure (ADEX)

The data is obtained from TNS, a syndicated research. This research monitors the number of placements on TV, radio and print media. The rates used to calculate the ADEX (Number of placements X rate) is based on rate cards from the media owners which will inevitably be higher than the actual rate.

This section will also track areas such as where most of the budget is spent on which media, which time belt and most popular channels.
Methodology

The other perspective involves the following

2. Analysis of the messages in the market

The data is obtained from MediaBanc, a communications tracking organization. This establishment monitors all paid placements on free to air TV, radio, print media as well as editorial coverage.

This section will analyze the type of campaigns, key messages and reason to believe of each piece of communication
ADEX – INFANT AND TODDLER CATEGORY
Jan – Dec 2008
Summary of category’s spends and activities

- IFT category reported an increase although it was the lowest increasing rate, year on year (18%)

- Enfa remains in the leading position despite a small increase (6%)

- Players joined the voice battle of beverage at year-end festive
Most of the players are switching their investments from mainstream and premium to super premium.
IFT adspend – year-end showed an up-spend

- Same trend of up-spend in Mar and May across the years
- Y 2008 found a different norm of declining spend at the end of Q3 and Q4; Sep and Nov-Dec presented a high investment of the category
- Possible reason for the TET spike is that brands will avoid the cluttered period before TET and relaunch after TET. Other spikes could be due to competition reacting to new launches or marketing initiatives
Cluttered with messages from most brands

- esp Mar, May, Jul and Nov-Dec
- The 3 periods sees higher participation from most brands which are less regular versus the major brands in the market
- Most of brands showed aggressive increase, except Dielac Alpha/Nestle Gau and Nuti IQ
- Despite of new player, Milex almost caught up with established brands like Abbott, Dumex, DL IFT and equals half spend of the leader - Enfa
The category is driven primarily by TV

- Only Nuti IQ used radio channel
- Friso, DL and Nestle Gau used more TV on the mix than the others do
• 73% of spend nationwide was dominated by 6 brands (Enfagrow, Friso, Abbott, Dumex, Dutch Lady & Milex).
• HCMC market is more competitive than the others and the investment pattern mirrors the national spend. HCMC and Cantho forms the bulk of total spend.
• Enfa put more focus on HAN and DAN while Friso prioritized on HCM.
• The other brands invested more in CAN. This could be due to less competition from the main brands.
GRPS (Unweighted)

Unweighted GRPS is a methodology wherein TV spots which are less than 30sec i.e. 5 sec is accorded the same weight as a 30sec. Normally used to measure the amount of brand exposure.

Eg. 30 sec spot = 10 GRPS, 5 sec spot is also 5 GRPS.

Weighted GRPS on the other hand takes into account the duration of the TVC. This method is used when an indication of its impact on brand affinity is required.

Eg. 30sec spot = 10 GRPS, 45sec spot will be equivalent to 15 GRPS while a 15 sec spot will be equivalent to 5 GRPS.
Category increased spends, but at lowest growth rate ever (18%),

- Friso and Milex led the growth at highest (more than double)
- Enfa remained the leader in both spending and SOV

73% of spend nationwide was dominated by 6 brands (Enfagrow, Friso, Abbott, Dumex, Dutch Lady & Milex).

2008 sees intensifying competition in the premium sector of the IFT category

- Players joined the voice battle of beverage at year-end Festive (X-mas, Tet)
- TV remains the most popular channel and consumes the most budget for the players with print a distant second.
Key competitors observation
Key information

- Brands have similar Buying Mix (channel, timeslot, program...)

- Most of the brand have their own short-TV program sponsorship (around 5 minutes), accounting 5-20% total budget, to maintain presence besides spots buy
  - Some communicate more about parenting
  - Some build brand positioning
Main key players spent in the same channels (National & South) while the other players was more focused on Mekong.
Program Mix (By GRPs)

- Series and Gameshow skew (>85% most of the brands)
**TV Daypart mix (by GRPs)**

<table>
<thead>
<tr>
<th>Brand</th>
<th>06:00 - 09:00</th>
<th>09:00 - 12:00</th>
<th>12:00 - 13:30</th>
<th>13:30 - 17:00</th>
<th>17:00 - 19:00</th>
<th>19:00 - 20:00</th>
<th>20:00 - 22:30</th>
<th>22:30 - 27:00</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENFAGROW</td>
<td>6%</td>
<td>21%</td>
<td>11%</td>
<td>3%</td>
<td>51%</td>
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**Total GRPS**

- 13,143
- 11,633
- 11,047
- 7,626
- 7,541
- 6,577
- 4,785
- 4,698
- 12,485

- Most of players spent on Noon and Evening slots except Friso was also focused on kidslots.
- Most of brands (except Nestle Gau) were spent much on 30s while Dumex is leveraged on >45s.
Analysis of the messages in the market
(Paid media)
Jan – Dec 2008
ABBOTT
Snapshot – Abbott (Advance, IQ, Corporate, Grow)'08

Weekly GRPs

January February March April May June July August September October November December

Avrg Advance IQ: 318
Avrg Gain IQ: 343
Avrg Grow: 247

Q1-08 Q2-08 Q3-08 Q4-08 Q1-09

- Grow – The Zoo
- Gain – Master 30s
- TV Sp'ship- Lang Kinh Thong Minh VTV3 Sat 11:00
- No1 Choice Discovery event Jan08
- Gain Advance- Leading Milk
- “3 First Golden Years” symposium & PR
- Gain IQ-5 Senses 30s

Currency : USD

Total spends
TV:2,266 K
Print:275 K

AED
Academy for Educational Development
Abbott Summary

- Abbott continues to drive two key SKUs in 2008
- Similac Mom which drives immunity as its core benefit with print as the main channel
- Gainplus IQ drives brain / IQ development as its core benefit. In Q3/2008, Abbott was relaunched with new Gain Plus IQ packaging. This initiative was supported with TV.
  - Communications leverage on the branded active ingredient “EYEQ”
Similac Mom Print ad – August 2008

Objective: Sustain awareness

Target: Pregnant and breastfeeding Mothers

Benefit: Provides nutrition that builds immunity for your unborn child.

Support: TPAN and other nutrition

Points of contact: TVC + Print ad

Tagline: Similac Mom – Testament of a parent’s love (only print)
**Headline**: “Mom and dad, do you know that building up my immunity is very important”

**Copy**: When your child reaches his 20th-week, this is an important time to build up his immunity.

How you can build up the immunity for your kid?

Similac Mom is milk for pregnant and breastfeeding moms. Enriched with TPAN (72ml) and other important nutrients, it provides the best nutrition for pregnant moms which in turn will help improve the kid’s immunity while he’s in the womb.

**Tagline**: Similac Mom – Testament of a parent’s love.
Gain Plus Advance 15s TVC – March-Sept 08

**Objective:** Sustaining Campaign & Sponsorship

**Target:** Mothers with children from 1 to 3 years old.

**Benefit:** Brain development

**Support:** Advanced IQ nutritional system incl. DHA, TPAN, Probiotics

**Points of contact:** TVC

**Tagline:** Abbott – A promise for life
VO: Breast milk is the best food for your kid’s health and total development.

Boy’s VO: Remember to be on time on my birthday. You do not have to wear a suit as the weather is hot. You can also go with your friend.

Super: Will your kid develop completely?
VO: Gain Plus Advanced IQ is proud to be the sponsor for IQ Institute.

Super: Prepares your kid for an optimal beginning. With Breakthrough IQ Nutrient System only found in Gain Plus Advanced IQ helps your kid become smarter to go ahead.

Gain Plus Advanced IQ

Super: Provides your kid for an optimal beginning.
For kid from 1 to 3 years old.

Tagline: Abbott – A promise for life
Gain Plus IQ TVC + Print ad – August 2008

Objective: Re-launch with new packaging

Target: Mothers with children from 1 – 3 years old

Benefit: Brain development

Support: IQ system (DHA, AA and Immunify), scientific proof

Points of contact: TVC + Print ad

Tagline: A promise for life
Super/MVO: Breast milk is the best food for the healthy and optimum development of your babies.

Super: IQ institution. For babies to grow outstanding.

FVO: Science research shows that babies' brain contains billions of brain cells when they are born. The key phase is 1-3 years of age where the 5 senses: Touch, Hear, Smell, Taste and See needs to be developed. Approaching things from outside will make the cells interact and stimulate them develop their full potential.

MVO: Mothers should know how to stimulate babies' senses and give them GainPlus Breakthrough. IQ nutrition system is enriched with DHA, Immunify and AA which will support brain development. GainPlus brings perfect nutrition source. For your baby to grow ahead.

Tagline: A promise for life
Gain Plus IQ 30s TVC – August 2008

Super/MVO: Breast milk is the best food for the healthy and optimum development of your babies.

Super: IQ institution. For babies to grow outstanding.

FVO: 5 senses: Touch, Hear, Smell, Taste and See. Approaching things from outside will make the cells interact and stimulate them develop their potential.

MVO: Therefore, mothers should know how to stimulate babies' senses and give them GainPlus Breakthrough. With the IQ nutrition system of DHA, Immunify and AA which will support brain development. GainPlus brings perfect nutrition source. For your baby to grow ahead.

Tagline: A promise for life
Gain Plus IQ Print ad – August 2008

Headline:

Gain Plus and the stimulation of 5 senses to stimulate the intellectual development of your baby.

Body copy:

Do you know that playing on the blue beach near the white sand with your kid is a way to stimulate his 5 senses and build his intellect. A kid’s brain is a wonder with billions of brain cells from the time he’s born.

The period of 1 to 3 years old is an important stage to support his intellectual development. Five senses which are Touch, Hear, Smell, Taste and See are stimulated from the environment which in turn stimulate the interaction of brain cells to develop his intellect.

Playing with your kid on the beach, listening to the sound from seashells, playing with sand and water or helping kid to observe everything around are simple ways to stimulate his 5 senses. Furthermore, Gain Plus – with IQ is perfect supplement with AA, DHA together with others elements that can optimize the development of a kid’s intellect. It is also clinically proven at level 1 that it can provide optimum development of his intellect, eyesight and language.
Gain Plus IQ Print ad – August 2008

Headline:

Link all the dots to see ...

Gain Plus stimulates 5 senses to stimulate intellect.

Body copy

Research shows that babies' brain contains billions of brain cells when they are born. The key phase from 1-3 years of age will require involvement of his 5 senses: Touch, Hear, Smell, Taste and See.

Approaching things from outside will make the cells interact and stimulate them develop their potential. Mothers should know how to stimulate babies' senses and give them GainPlus Breakthrough. With the IQ nutrition system of DHA, Immunify and AA which helps to support brain development. GainPlus provides the nutrition for your baby to grow ahead.

Tagline: A promise for life
Snapshot – Mead Johnson - Enfa 2008

Weekly GRPs

 Currency: USD

Total spends
TV: 1,891 K
Print: 441 K

Q1-08
TV Sp’ship- Play With Me Sesame VTV1
Sesame promotion
Testimonial 30s
Arrow 30s
Enfagrow- 200g pack
DHA & DRA advertorial

Q2-08
Smart Choice advertorial
Language IQ advertorial

Q3-08
Miracle 45s
Face Lift 30s

Q4-08
Arrow 650g

Q1-09
Miracle 30s Revised

Ave.329
MeadJohnson Summary

• MeadJohnson continued airing 2 TVCs in parallel from Q2-Q3/2008. Both communicating brain development.

• In Q3/08, MeadJohnson launched a promotion for both GUM and milk for expecting moms.

• They also sponsored the Parent Consulting program which is similar to Abbott’s wherein at the beginning of the year, MeadJohnson launched a Writing Competition for parents to share their feelings and experiences on child care.
Enfagrow A+ TVC – April-Sept 2008

Objective: **Sustaining campaign**

Target: **Mothers with children from 1 to 3 years old**

Benefit: **Brain development.**

Support: **DHA**

Points of contact: **TVC**

Tagline:
Enfagrow A+ TVC – April-Sept 2008

VO: How wonderful is it to listen to the beat of two hearts inside you. The first 3 years is a very important phase for brain development. So I’ve tried my best to help my baby to develop his brain.

Super: Mom’s birthday. Wonderful developments may happen in the first 3 years as the baby’s brain reached 80% of the adult’s capacity. DHA is an essential building block for the brain.

FVO: Enfagrow A+, the most wonderful things for your baby
Enfagrow A+ 30s TVC– June-Sept 2008

Objective: Sustaining campaign

Target: Mothers with children from 1 to 3 years old

Benefit: Supports the brain cell development for kids’ successful future.

Support: 4x more DHA, No 1 in US

Points of contact: TVC

Tagline: Nurture intellect, achieve success
VO 1: “Hi everybody, hot new !!! Enfagrow A+ with 4 times more DHA.”

VO 2: “What is DHA used for ?”

VO 1 : “DHA supports the development of brain cells

VO 2 : “ So what is the benefit of DHA ?”

VO 1: “ Help us study better”

VO 2: “ Are you sure ?”

VO 1: “ Of course, I am smart thanks to Enfagrow A +.

New Enfagrow A + with 4 times more DHA.”

Tagline: Nurture intellect, achieve success
Enfagrow A+ 15s TVC – July-Sept 2008

VO 1: “Hi everybody, hot new !!! Enfagrow A+ with 4 times more DHA.”

VO 1: “DHA supports the development of brain cells

VO 1: “ Help us study better”

Tagline: Nurture intellect, achieve success
Enfagrow A+, Enfakid A+ Promotion-Sept 08

Objective: **Drive on ground excitement and sales**

Target: **Mothers with children from 1-3 years old**

Benefit: **Redemption of gifts with foil**

Support: **Toys for their future career (Little Doctor, Nutrition, Engineer, Scientist)**

Points of contact: **Print ad**

Tagline:
Enfagrow A+ & Enfakid A+ Promotion-Sept 08

Headline: Gift for today and occupation for tomorrow

Body copy:
Collect Enfagrow A+ and Enfakid A+ foils to redeem “Future career” toys for your beloved kids.

Prizes:
“Little Doctor” toy
“Nutrition expert” toy
“Engineer” toy
“Scientist” toy
Objective: Build credibility and support for the promotion campaign

Target: Mothers with children from 1-3 years old

Benefit: Brain development for kids from the toys

Support: Advice from scientists/doctor

Points of contact: Advertorial
Headline: Gifts today for their future tomorrow.

Body copy:

Three determinants for the total development of kids are its genes, nutrition and interaction of brain to its surrounding. Genes is just one factor while nutrition and raising a kid are the key determinants for kid’s intelligence.

According to Ms Dao Phuong Duy – A psychologically specialist, playing with kids and choosing educational toys can stimulate and develop a kids’ intellect.

With this promotion, Enfakid and Enfagrow gives to parents many educational toys that can stimulate and develop kids’ intellect.
Enfagrow A+ Event – August-Sept 2008

Objective: Build affinity with the target audience

Target: Mothers with children from 1 to 3 years old

Benefit:

Points of contact: Print ad
Enfagrow A+ Event – August 2008

“Together with your beloved kid for a brighter future” writing competition

Parents submit essays about their love and plan for their beloved kids.

Prizes:

1st: 1 Year supply of Enfagrow A+

2nd: 6 months supply of Enfagrow A+

3rd: 3 months supply of Enfagrow A+
Announcing the winners of “Together with your beloved kid for brighter future” writing competition and showcasing the winning essay.
Enfagrow A+ - Promotion – Dec 08

Headline: Save 10% with New Enfagrow A+650g carton box.

During this economic crisis, how do you choose the best for your kid? Mead Johnson would like to introduce new Enfagrow A+650g carton box which gives you the same quality as the can.
Enfagrow A+ sponsorship program – April 07-Sept 08

Objective: Build a platform to engage with parents.

Target: Mothers with children from 1-3 years old

Benefit: DHA, Choline, Zn, Fe, SA ARA, lot.

Points of contact: TVC program trailer
Enfagrow A+ sponsor – April07-Sept08

Super: Enfagrow A+ is proud to be the sponsor for the “Raising kids” program.
Mead Johnson Advertorial – Sept 2008

Objective: Build equity for the Meadjohnhson brand
Target: Mothers
Benefit: Inform mothers about the background of the company
Support: No 1 in US, 100 year experience, produced in Vietnam
Points of contact: Advertorial
MeadJohnson Advertorial – Sept 2008

Headline: Ensure Mother’s trust
Body copy:
MeadJohnson is the number 1 milk company in US with more than 100 year experience. MJ has many famous brands including EnfaMama A+, Enfalac A+, Enfapro A+, Enfagrow A+, Enfakid A+ ... Furthermore, MeadJohnson has other brands that fulfill special requirements about nutrition of kids. After one year, providing milk products to Vietnam, MeadJohnson has established the company here. This is a good news for either milk expert and mothers as they receive higher quality product from MeadJohnson.
FRIESLAND
Snapshot – Friso 2008

Weekly GRPs

January | February | March | April | May | June | July | August | September | October | November | December

TV: 3,012 K
Print: 209K

Q1-08
Cover Up 30s

Q2-08
TV Sp’sor: Vi suc khoe tre em
Talking tot 30s

Q3-08
New thematic
Talking tot 30s Revised

Q4-08
Easy Lid 30s 30s
Rocky 30s

Q1-09

Currency: USD

Avrg Friso Gold 3: 256
Avrg Friso Gold 4: 165
Avrg Friso powder range: 90

Total spends

TV: 3,012 K
Print: 209K
Friesland Food Summary

• Friso re-aired the TVC for Friso Step 3&4 from Q2-Q3/2008

• In Q3/2008, similar to other milk brands, Friso aired a promotion campaign.

• Following the trend of Abbott and MeadJohnson, Friso also held a writing competition. This is differentiated by writing which is more about tips and experiences rather than emotional feeling.
Friso Gold 3 TVC – May-Sept 2008

Objective: Sustaining campaign

Target: Mothers with children from 1-3 years old

Benefit: Improves immunity

Support: Boostimune

Points of contact: TVC

Tagline: Friso - Growing up together with your beloved kid
Friso Gold 3 TVC – May-Sept 2008

VO: My mom acts as if she is a bodyguard. Mom keeps watching over me every minute. Friso can protect me as well as you can. Friso Gold with Boostimune improves immunity, protects your beloved kid so they can grow fast.

Friso – Choice of Mothers to protect their beloved kids.

Tagline: Friso - Growing up together with your beloved kid
Friso Gold 4 TVC – June-Sept 2008

Objective: Sustaining campaign
Target: Mothers with children from 3-6 years old
Benefit: Improve immunity
Support: Boostimune
Points of contact: TVC
Tagline: Friso – Choice of mom to protect kid
Friso Gold 4 TVC– June-Dec 2008

VO: Mom gives me Friso everyday for my health.

Super: Dirty water

Strong wind. Hot sun

Friso Gold – Improves immunity. Protects your kid from dirty water, strong winds and hot sun and heavy rains.

Tagline: Friso Gold – Choice of mom to protect their little ones
Friso Promotion – August 2008

Objective: Drive on ground excitement

Target: Mothers with children from 1-6 years old/Pregnant moms

Benefit:

Support:

Points of contact: Print ad

Tagline: Mothers’ choice to protect kids
Ball house Friso. Funny world for kids.

Ball house is a safe playground and an interesting world for kids. Collect caps and redeem a ball house.

Mother’s choice to protect beloved kid.
Friso with Protected cap – Nov & Dec 08

Introducing New Friso with protective cap – Mom’s choice for baby.
Friso Advertorial/Event – August 2008

Objective: Build affinity with users of the brand

Target: Mothers with children from 1-6 years old

Benefit: Inform mothers about raising kids’ method/join in writing competition to share tips and experiences.

Support: 

Points of contact: Advertorial

Tagline:
Friso Advertorial – August 2008

Headline:
Raising strong kids is not difficult.

Body copy:
If kids have a strong immune system, they will always have good health.

Ways to improve kids’ immunity:
1. Do exercise
2. Provide sufficient nutrition
3. Drink milk frequently: especially Friso milk with Boostimmune with active ingredients that improves immunity.
4. Make sure he has enough sleep

Writing competition” Kid is healthy-Mother is happy”
Mothers can share their experience and tips in raising kids.
Headline:
Kid’s health from the expert’s point of view

Body copy:
Experts answers mothers’ queries on how to raise their kid well.

Writing competition” Kid is healthy-Mother is happy”
Mothers can share their experience and tips in raising kids.
Friso Event – August 2008

Headline:
Health of kid, happiness of mothers

Body copy:
Mothers sharing their experience and tips in raising kids.
DUTCH LADY
Snapshot – Dutch Lady IFT Jan-Dec’08

Weekly GRPs

Currency: USD

Total spends
TV: 2,556 K
Print: 221 K

Q1-08
Little Angels TV Sponsorship
Frogs 30/15s
Pingpong 30/15s
T/T Ratio Advertorial

Q2-08

Q3-08

Q4-08

Q1-09

Nang luong cho nao 45s

New 1.5kg tin

Ave.315
Dutch Lady Summary

- Dutch Lady continued airing the 123&456 TVC

- In Q3, Dutch Lady launched a new product – Dutch Lady Gold 123-456 which is more premium than the previous one. They differentiated themselves by communicating a new benefit which is the energy for kids’ brain.

- The campaign is communicated broad and massive on TVC, Print ad, Advertorial, Billboard and posters.
Dutch Lady 123 & 456 TVC – April 07-Sept 08

Objective: Sustaining campaign

Target: Mothers with kids from 1 to over 6 years old.

Benefit: Helps kids improve intelligence and ability to solve problems.

Support: TT Ratio formula (Tyrosine, Tryptophan). (DHA, AA, Choline, SA, Sphingomyeline)

Points of contact: Print Ad, TVC, Advertorial, Promo.

Tagline: Prepares for a life full of vitality.
MVO/Super: Breast milk is the best food for the healthy and optimum development of your babies.

MVO: Dutch Lady 123 and 456 is enriched with TT Ratio formula. TT helps kids acquire information fast.

Girl’s VO: ah water makes the duck toy float.

MVO: TT Ratio – important nutrition helps kids study better.
MVO/Super: Breast milk is the best food for the healthy and optimum development of your babies.

MVO: New Dutch Lady 123 and 456 is enriched with TT Ratio formula which includes Tyrosine and Tryptophan. It helps kids improve their ability to acquire knowledge and process information quickly.

Girl's VO: Remote control makes the duck go away.

MVO: TT Ratio – important nutrition helps kids study better.
Dutch Lady Gold TVC + Print ad – Sept 2008

Objective: Launch of new product (super premium)

Target: Mothers with children from 1-3 years old

Benefit: Provide kids with mental energy for learning.

Support: Palatinose, DHA, AA, Choline

Points of contact: TVC+ Print ad, Billboard, Advertorial

Tagline:
VO: Introducing New Dutch Lady Gold enriched with Palatinose which provides mental energy for kids. Kids’ brain need 200% more energy when compared with adults; a lack of energy will hinder the learning process.

Super: Hinder the learning process

VO: Drinking Dutch Lady with Palanitose everyday provides energy for brain, so your kid can learn many interesting things like colorful rainbow.

Super: Continue learning

VO/Super: Energy for brain
Dutch Lady Gold Print ad – Sept 2008

Headline:
Energy for kids’ brain

Body copy:
Dutch Lady Gold – energy for brain
Keeps kids going on learning.
Do you know that kids’ brain need 200% more energy when compared with an adult’s one.

New Dutch Lady Gold, beside DHA, AA, Choline ...it also has Palatinose which can provide a continuous source of energy that helps kids to go on learning.
Headline:
Energy for kids’ brain

Body copy:
Need for energy of kid’s brain:

According to many scientists, the energy needs of a kid’s brain is much higher than an adult as kids need to process many information. However, a kid’s brain is not able to store energy and also never stops operating even when the kid is sleeping. Therefore, the energy plays an important role in a kid’s learning process. A lack of energy may interrupt the learning process.

In order to provide enough energy for their brain, we have to provide food including glucose for kids. Glucose is in honey/milk with Palatinose. Dutch Lady Gold 123-456 with Palatinose and other nutrition like DHA, AA, Trytophan…. provide energy continuously for kid’s learning process.
Dutch Lady Gold Billboard – August - Dec 08

Copy : Energy for kids’ brain
Snapshot – Milex Jan-Dec’08

TV: 1,494 K
Print: 339 K

Weekly GRPs

Currency: USD
Arla Summary

- Milex still focused on building the benefit of immunity for kids.
- To strengthen their credibility, they leveraged on them being the milk supplier for NASA in all channels.
- In Q2 and Q3/2008, Milex continued to build equity by launching a series of ads building on their relationship with NASA.
- Following other brands, Milex also launched a promotion campaign to drive on ground excitement.
Milex TVC + Print ad – Sept 2008

Objective: Launch Proplus

Target: Mothers with children from 1 to 7 years old

Benefit: Strengthens your kids immunity

Support: Probiotics A+ B+ C+ (DHA, ARA), Prebiotics FOS/Supplier of dairy products for NASA

Points of contact: TVC + Print ad

Tagline:
VO:

Who will be the first person to step on the Moon?

Soon, someone will make the dream come true and make us proud.

With advanced immunity system from Milex, your kid can have his dreams come true.

Super: Official supplier of dairy products for NASA

Super on the spacecraft: Advanced nutrition system. Supports digestion and absorption. Improves immunity.

VO/Super: Optimal immunity for your beloved kid
Milex 15s TVC – Sept 2008

VO:

Products are brought to universe are always the best achievement from the Earth. We applied this achievement to produce Milex

Super: Official supplier of dairy products for NASA

Super on the spacecraft: Advanced nutrition system. Supports digestion and absorption. Improves immunity.

VO/Super: Optimal immunity for your beloved kid

Milex 15s TVC.avi
Milex 15s TVC – Sept 2008

Super: Official supplier of dairy products for NASA

VO:

Milex is a trustworthy product produced by leading milk company from Denmark. It is designed to develop optimum immunity for kids. This is so they can achieve whatever their dreams are.
Headline: Have you ever thought that your kid will be the first person to step on the moon?

Body copy:

Milex with optimal immunity system is enriched with Probiotics A, B, C, Prebiotic FOS, DHA and ARA thereby giving kids a solid nutritional platform for their dreams to come true.
Milex Print ad – Sept 2008

Headline: For the most precious kid on earth

Body copy:

Milex with optimal immunity system is enriched with Probiotics A, B, C, Prebiotic FOS, DHA and ARA thereby giving kids a solid nutritional platform for their dreams to come true.
Headline: Advanced achievements from the number 1 milk company in Europe.

Body copy:

Milex – 100% milk imported from Denmark. Milex with optimal immunity system is enriched with Probiotics A, B, C, Prebiotic FOS, DHA and ARA thereby giving kids a solid nutritional platform for their dreams to come true.
Headline: Advanced immunity for you beloved kid

Body copy:

Milex with optimal immunity system is enriched with Probiotics A, B, C, Prebiotic FOS, DHA and ARA thereby giving kids a solid nutritional platform for their dreams to come true.
Milex Promotion – Sept 2008

Objective: Drive on ground excitement and sales

Target: Mothers with children from 1 to 7 years old

Benefit/ Mechanics: Redeem prizes with foils from pack

Support:

Points of contact: Print ad
Milex Promotion – August 2008

Headline: Gifts for the future Astronaut

Body copy:

Mechanism:

12 scores: Smart astronaut

Table and chair

6 scores: Active astronaut

Bicycle

2 scores: Strong astronaut

Sweater
Milex advertorial – Sept 2008

Objective: Educate mothers on the importance of friendly bacteria

Target: Mothers with children from 1 to 7 years old

Benefit:

Points of contact: Advertorial
Headline: “Bacteria” for kid’s health

Body copy:

Probiotic is a friendly bacteria which is helpful to the digestion system. There are three kinds of Probiotic; Probiotic A, B, C. Prebiotic is food for Probiotics that can eliminate diarrhea, gut infections and skin allergies. Prebiotic also reduces constipation. Providing sufficient friendly bacteria can help kid develop a strong immunity and help kid absorb maximum nutrition.
Milex advertorial – Sept 2008

Objective: Reinforce credibility of the brand

Target: Mothers with children from 1 to 7 years old

Benefit:

Support: We provide food for NASA

Points of contact: Advertorial
Headline: Journey into universe

Body copy:

When traveling to outer space, people need double the amount of nutrition compared to when they are on Earth. Therefore, astronauts need to have a special nutrition system. Arla has been the number one milk company in Europe which supplies food for astronauts in NASA. Beside, Arla developed Milex- a growing up milk powder category.

Although in Vietnam for only a year, it is trusted by many Vietnamese mothers.
Headline: Interesting story about milk

Body copy:

Everybody often thinks that milk is only for kids and old people; however, milk is also for astronauts. Arla successfully developed 3 dairy products for astronauts. It is interesting to know that Arla also produces growing up milk powder which called Milex. This milk can improve kids' immunity, the ability to absorb nutrition, eyesight and ability to perceive everything around.
DUMEX
Snapshot – Dumex Dugro 2008 - Done

Weekly GRPs

January
February
March
April
May
June
July
August
September
October
November
December

Total spends
TV: 1,967 K
Print: 570 K

Currency: USD

Ave. 272

Q1-08
Q2-08
Q3-08
Q4-08
Q1-09

4 Seasons 30s
Weather Change thematic

Immunity Twin 45s
Dumex Gold Immunity Step 3/10 Core Pack

Objective: Raise credibility for the brand and build premium imagery

Target: Mothers with children from 1-3 years old

Benefit: DUMEX 10-SCORE PACK - MORE HYGIENIC & CONVENIENT, for your kids protected

Points of contact: TVC, Print ad

Tagline: Dumex Gold Immunity – Constant Protection for kids
VO: With Dumex Gold immunity, My Hanh stays worry free for her kid.

VO & Super: Dumex Gold Immunity – Constant Protection for kids
Headline: Little fan stays healthy, My Le stays worry free.

Tagline: Dumex Gold Immunity – Constant Protection for kids
Headline: Little fan stays healthy, Thuy Hanh stays worry free.

Tagline: Dumex Gold Immunity – Constant Protection for kids
Dumex Gold Print Ad – June-August 2008

Headline: Little fan stays healthy, Kim Hien stays worry free.

Tagline: Dumex Gold Immunity – Constant Protection for kids
Dumex Gold Print Ad – June-Dec 2008

Headline: DUMEX 10-SCORE PACK - MORE HYGIENIC & CONVENIENT

Tagline: Dumex Gold Immunity – Constant Protection for kids
Snapshot – Dielac Alpha – 2008

Total spends
TV: 1,357K
Print: 288K

Weekly GRPs

Currency: USD

TV Sponsorship "Mother’s Love" HTV7 (19:00-19:30 Sun)

No print activity in Q1
Vinamilk Summary

• Continued airing the old ads from last year.

• During the price increase crisis, Vinamilk took advantage of this to communicate their high quality but at an affordable price. On advertorials, they use the model and actress Ngoc Thuy as their brand ambassador.
Dielac Alpha TVC – March-Sept 2008

Objective: Sustaining campaign

Target: Mothers with children from 1-3 years old

Benefit: Improves immunity and total development

Support: Colostrum, DHA, FOS, Fe, Calcium, Omega 3, Omega 6, Calcium..

Points of contact: TVC

Tagline: Mother’s love
Mother’s VO: I love you most in the world and always give you the best nutrition. With Colostrum milk, Dielac improves immunity and provides enough nutrition for kids to become smart, creative, tall and active everyday.

VO/Super: Dielac – Mother’s love
Dielac Alpha Print ad – June-August 2008

Objective: Sustaining campaign

Target: Mothers with children from 1-3 years old

Benefit: Improves immunity for an optimum development (EQ, IQ, digestion, mental, eyes physical and height)

Support: Alpha formula (igG, igA, igM, DHA, Omega 3, Omega 6, Choline)

Points of contact: Print ad

Tagline: Mother’s love
Headline: Advanced IQ from healthy immune system.

To develop advanced intelligence, kid needs to be healthy to absorb the necessary nutrition. Dielac with Alpha formula can improve immunity. It also has DHA, Omega 3, Omega 6 and Choline for mental and sight improvement. High calcium, vitamin and minerals develops their height. Alpha – For your kid’s total development

Tagline: Mother’s love
Headline: Advanced Emotional Intelligence (EQ) from a healthful immune system.

Healthiness and intelligence is the platform for your kid to develop the ability to communicate and integrate. Dielac with enriched with Alpha formula can improve immunity.

DHA, Omega 3, Omega 6, Choline for mental and eye-sight improvement.

It also has high calcium, vitamin and mineral to help kids to develop height. Dielac provides optimum development of health, body and mental so kids can actively explore and integrate into the world. Dielac Alpha – For your kid’s total development

Tagline: Mother’s love

Dielac Alpha Print ad – June-August 2008
Dielac Alpha Print ad – August 2008

Objective: New campaign

Target: Mothers with children from 1 to 3 years old.

Benefit: Smart choice to improve resistance and brain development.

Support: Colostrum, DHA, Omega 3, Omega 6, Choline and affordable price

Points of contact: Print ad
Headline: Choose the best nutrition in the smartest way.

Body copy:

Protein and fat content determines the quality of nutrition while additional supplements supports the development of a kid. According to the research by Ministry of Health, Dielac Alpha contains sufficient nutrition for optimum development of kids. Furthermore, it is enriched with Colostrum, DHA, Omega 3, Omega 6 and Choline which builds kids’ resistance and brain development. With savings from local materials, transportation fee from overseas, foreign labor cost, Dielac Alpha provides Vietnamese consumers a high quality product at affordable price. Therefore, Dielac Alpha is the smart choice for you.
Dielac Alpha Advertorial – Sept 2008

Objective: *Educate mothers on how to choose the appropriate milk*

Target: *Mothers with children from 1 to 3 years old.*

Benefit: Affordable milk that provides core nutrients

Support:

Points of contact: *Advertorial*
Headline: Model-Actress Ngoc Thuy – raising kid is a wonderful experience

Body copy:

This article is an interview of Ngoc Thuy who is a VN celebrity with 1 daughter and is staying in US. She is sharing with everybody about her experience in taking care of kid. She emphasized that she often choose milk for her kid based on the core nutrients (like Vinamin, Protein, Fat..) not on enhanced nutrition (Choline, DHA, AA.). The core nutrition determines the total development for kid while supplements just helps complete the brains' development. She recommend Dielac Alpha as a good choice as it includes all the basic nutrition and is enriched with Colostrum. She also points out that when choosing milk we should consider the nutrition, not on the price as the expensive one is not always good.
Nam Yang Summary

• Nam Yang continued airing their old spots from mid of last year up to now.

• Further, in Q3/2008, Nam Yang did a promotion for both Star Gold Science and Star Mom Gold. They also sponsor for the show “Lunar new year” on TV.
Imperial Dream X.O TVC– Aug07-Sept 2008

Objective: Sustaining campaign

Target: Mothers with children from 0-3 years old

Benefit: 5 scientific programs: Maximum growing, Cell development, Height Development, Immunity improvement, More intelligence

Support: 54 nutrition includes IGF, EGF, TGF-β, slgA-IgB, DHA-ARA...

Points of contact: TVC, Print ad

Tagline: Enjoy the quality
Imperial Dream X.O TVC– Aug07-Sept 2008

Vo:

18 special nutrients that are close to breast milk, with protein

Super: Exploring X.O:

- No sugar
- No flavoring
- Pure ingredients
- No preservatives
- Special proteins

Imperial Dream XO - San pham dinh cao ver.2 15s 140908.avi
X.O Sponsorship – August 2008

Objective: **Build affinity and goodwill with the target audience and general public**

Target: **Families with kids**

Benefit:

Support / Mechanics: **Main sponsor for the Lunar New Year show (An entertainment program)**

Points of contact: **Print ad**

Tagline:
X.O sponsorship – August 2008

X.O is the main sponsor for the Mid Autumn’s show
X.O and Star Science Gold – August 2008

Objective: Assure mothers of the quality of Nam Yang product

Target: Mothers of kid from 1 to 6 yrs

Benefit:

Support: Certificate/Guaranteed stamps

Points of contact: Print ad

Tagline: Enjoy the quality
Headline: Already safe but even safer now

Body copy:

X.O and Star Science Gold of Nam Yang cooperation once again guarantees that our products are Melamine free.

5 minutes of a mother’s time assures … the future of your child

Guaranteed quality of product

Quality guaranteed by Nam Yang corporation

Provides sufficient nutrition for kid’s total physical and mental development.

Sealed for freshness and tasty for kid.
Star Science Gold TVC– June-Sept 2008

Objective: **Campaign Sustaining campaign**

Target: **Mothers with children from 0-3 years old**

Benefit: **5 scientific programs:** Maximum growing, Cell development, Height Development, Immunity improvement, More intelligence

Support: **54 nutrition includes IGF, EGF, TGF-f, slgA-IgB, DHA-ARA.**

Points of contact: **TVC, Print ad**

Tagline: **Enjoy the quality**
Vo: Breast milk is the best food for your kid’s health and total development.
If you can remember the 5 special scientific programs, you are a good mom.
5 special scientific programs for your beloved kids.
Star Science Gold – Because you are my beloved kid.
Super:
1. Maximum growing - IGF
2. Cell development - EGF
3. Height development – TGF-β
4. Immunity improvement – sIgA-IgB
5. More intelligence - DHA-ARA
Five specials ingredients for your beloved kid.
Tagline: Enjoy the quality.
Breast milk is the best food for your kid’s health and total development.

Star Science Gold – Because you are my beloved kid.

Five specials ingredients for your beloved kid:

1. Maximum growth - *IGF*
2. Cell development - *EGF*
3. Height development – *TGF-β*
4. Immunity improvement – *slgA-IgB*
5. Builds intelligence - DHA-ARA
Star Science Gold advertorial – August 2008

Objective: Build expertise of brand
Target: Pregnant mothers
Benefit:
Support: Conference wherein experts share the need and reasons why immunity is important and role of product
Points of contact: Advertorial
Tagline:
Headline: Nutrition – platform for perfect immunity.

Body copy:

This article summarizes about the conference “Updates on nutritional issues and need for strong immune system for kids”. Professor Nguyen Gia Khanh, head of pediatrics of Hanoi Medical University, emphasized the importance of nutrition for forming and developing a kid’s immune system from the first year of the kid. If there is a lack of necessary nutrition, it will have negative effects on the immune system. It is essential to start during pregnancy. This will help the kid later on in life against infections.
Star Science Gold promotion – August 2008

Objective: Drives sales and on-ground excitement

Target: Mothers of kid from 3-6 years old

Benefit / Mechanics: Redeem caps for many interesting prizes

Points of contact: Print ad
Star Science promotion – August 2008

Winner announcement of Star Science promotion
<table>
<thead>
<tr>
<th>Brand</th>
<th>Key Communication Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abbott (Gain Plus Advance)</td>
<td>Advanced IQ nutritional system – brain development benefits.</td>
</tr>
<tr>
<td>Mead Johnson (Enfagrow A+)</td>
<td>DHA – support brain development for kid’s successful future</td>
</tr>
<tr>
<td>Friesland (Friso)</td>
<td>Boostimune improves immunity for your kids</td>
</tr>
<tr>
<td>Nam Yang (Star Science Gold)</td>
<td>Star Science Gold – Milk with 5 special scientific programs for your beloved kids</td>
</tr>
<tr>
<td>Arla (Milex)</td>
<td>An European milk product used by NASA – Focused on immunity for kid development</td>
</tr>
<tr>
<td>Vinamilk (Dielac Alpha)</td>
<td>Smart choice to improve resistance and brain development for your kids at an affordable price.</td>
</tr>
<tr>
<td>Dumex (Dumex Gold)</td>
<td>Dumex Gold Immunity to protect your kids</td>
</tr>
</tbody>
</table>
Other Nutritional Product
Nestle – Infant cereal

- Infant cereal Nestle for baby from 6 months to 24 months.

- 140 experience years, Infant cereal Nestle has been mixed all natural nutrient, supplement Prebio 1, DHA, vitamin and mineral.
Vinamilk – Redielac cereal

Ridielac Alpha and Ridielac Star is developed by Center for Nutrition Research and Products Development of VINAMILK in accordance with International Committee for Nutrition Codex Alimentarius’s recommendation for Newborn and Children. It also received the international certificate in Food Safety and Hygiene HACCP.

Ridielac Alpha & Ridielac Star are nutritional cereal for infant above 6 months.
Dollac Pro for "Refusal to eat" syndrome kids

- Introduce Dollac Pro (a product of Hacofood – a local food company) a special milk powder for "Refusal to eat" syndrome kids.
- Only product news on advertisement column

18th Jul – Thanh Nien
Milna Rusk

- Milna Rusk can be served as either porridge or directly as a biscuit to facilitate the growth of baby’s teeth.

- Milna Rusk is formulated by adding “Brain care & body defense” formula and enriched with Prebiotic, AA & DHA, milk calcium, and 18 essential vitamins and minerals to optimize baby’s growing-up development.

- Appeared in market around 7 years ago as the first nutritional biscuit for infant.

- There isn’t any communication activities in 2008.
Snap shots of promotion
# Summary

<table>
<thead>
<tr>
<th>Brands</th>
<th>Key activities</th>
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<tr>
<td>Mead Johnson</td>
<td>- Collect promotional stamps to get free pillow (Enfamama)</td>
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<tr>
<td></td>
<td>- Collect points and redeem a set of “future career” (EnfaGrow A+</td>
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<tr>
<td></td>
<td>EnfaKid A+)</td>
</tr>
<tr>
<td>Vinamilk</td>
<td>- Redeem for free gift when purchase 400g can or 250g pack (Ridielac)</td>
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<tr>
<td></td>
<td>- Collect points of any purchase Dielac products to redeem free gift</td>
</tr>
<tr>
<td>Dumex</td>
<td>- Collect spoons from Dumex “Mark 10” to get free gift</td>
</tr>
<tr>
<td>Nutifood</td>
<td>- Get free gift when purchase PediaPlus 400g or 900g</td>
</tr>
<tr>
<td>Milex</td>
<td>- Collect label to redeem gift</td>
</tr>
<tr>
<td>Abbott</td>
<td>- “Kid’s bright moment” online photo competition (GainPlus)</td>
</tr>
</tbody>
</table>
Mead Johnson - Enfamama

• Promotion period: 15th Sep to 19 Oct

• Get a free pillow from Enfamama A+ when you buying a Enfamama A+ pack and collect the promotional stamps.

• Pillow can be use when you breast-feed or as a toy for baby.

• Hotline: 18001598 or log in website www.giadinhenfa.com.vn

9th Oct – Yeu Tre magazine
Mead Johnson – Enfagrow A+, Enfakid A+

• Promotion period: 1\textsuperscript{st} Oct to 31\textsuperscript{st} Oct

• Buy Enfakid A+ or Enfagrow A+ to collect points and redeem a set of “future career” toy (i.e: doctor, engineer, nutritionist, etc.)

13\textsuperscript{th} Oct – Tiep Thi & Gia Dinh magazine
PR coverage

What kind of toy will help kids’ brain development?

Does toys affect a kids’ future career?

1st Oct – Phu Nu Thu Do Newspaper
Follow up cereal Ridielac - Vinamilk

• Promotion period: 15th Oct to 15th Dec 08
• You can redeem for a free gifts like toys and tee shirts when you purchase a 400 gram can or 250 gram pack.
Dumex

• Promotion period: 15th Jul to 15th Aug.

• Collect spoons from Dumex “10 Mark” pack to redeem gifts like backpacks, plastics bowls, toys and many others

• Dumex “10 mark” is new convenient designed packaging

21st Jul – The Gioi Phu Nu
PediaSure - Nutifood

- Promotion: 24th Nov - 31st Dec
- Free kid’s watch with any purchase of PediaPlus 400g can get a free machine that teaches Vietnamese pronunciation with any purchase of PediaPlus 900g can.

17th Nov – Sai Gon Tiep Thi Magazine
Vinamilk

- Promotion period: 15th Jan 2009
- “Fashion for Mom - Smart toys for kid”
- Collect points with the any purchase of the following and redeem gifts such as bags and computer for kids with the points
  - Dielac Alpha 123, Dielac Alpha 456. Dielac Mama, Dielac Pedia
Milex

- Promotion period: 15th Nov to 15th Dec.

- “Milex Future Astronauts” promotional program.

- Collect the labels to redeem for free gifts such as bicycles and apparel for babies.

31st Oct – Suc Khoe & Doi Song magazine
GainPlus IQ - Abbott

• Promotional period: 15\textsuperscript{th} November till 29\textsuperscript{th} November 2009

• “Kid’s Bright Moments” Competition- Sponsored by Abbott, Canon and MicroStar

• Enter a picture and vote for the best shots. Best pictures will win laptops and digital cameras
Analysis of the messages in the market
(Editorials)
Jan - Dec 2008
Overview

2008 saw 2 key issues rocking the overall category namely the drastic price increases which dominated headlines in Q1 while the melamine scare dominated headlines in late Q3 to Q4.

Also reported in the press were the forums and seminars organized by the dominant players throughout the year. Issues covered are as follows

• Brain development
• Refusal to eat
• Infant formula achieving the same composition/nutrition similar to that of mother’s milk
• Why pay for expensive imported products
# Summary

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<td>Abbott</td>
<td>- Leverage on IQ Institution program (seminar, gameshow, workshop)</td>
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<td>- CSR – Milk donation program (Oct 08)</td>
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<tr>
<td></td>
<td>- Leverage on “Overcoming refusal to eat” workshop</td>
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<tr>
<td></td>
<td>- Create “Listen to your baby” forum</td>
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<tr>
<td>Mead Johnson</td>
<td>- Promote Enfamama with DHA (Oct – Nov 08)</td>
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<td>- “Golden standard for infant nutrition” seminar (08th Nov)</td>
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<td>- “Breast milk is the best present for your child” forum (Nov – Dec 08)</td>
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<td>- Advertorial series to promote Enfa A+ (Dec 08)</td>
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<td>- Leverage on children’s inborn inability to absorb nutrition disorder editorial series.</td>
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<td>Meiji</td>
<td>- Holding “The value of breast Milk” Seminar (12th October 2008)</td>
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<td>- Leverage on infant nutrition &amp; breast milk editorial series</td>
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<td>Vinamilk</td>
<td>- Leverage on how to choose milk for kids editorial series</td>
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<td>- Leverage on &quot;Refusal to eat&quot; syndrome advertorial series</td>
</tr>
<tr>
<td>Dumex</td>
<td>- Drive awareness to Gameshow: Walk together with the child (Since Sep 08)</td>
</tr>
<tr>
<td>Milex</td>
<td>- Holding “ProPlus – Immune Strengthening from inside” seminar (10th Aug)</td>
</tr>
<tr>
<td></td>
<td>- Introduce Milex and its Western quality advertorial series (Nov 08)</td>
</tr>
<tr>
<td>Nutifood</td>
<td>- Leverage on “Refusal to eat&quot; syndrome to promote PediaPlus and introduce Pedia Plus promotion (Nov – Dec 08)</td>
</tr>
</tbody>
</table>
1. IQ Institution (July 08 – Nov 08)

- Launched in conjunction GainPlus IQ targeting moms with kids from 9mths old.

- A concept which is brought to life on a game show on HTV7 on Sunday at 7.30pm and HNTV at 8.05pm.

- A roadshow was organized nationwide wherein games that can develop brains (With an emphasis on reading ability) are introduced.

- Hotline and website was developed to support this platform (www.hocvieniq.com, hotline: +84 8 38221221)
IQ Institution (July 08 – Nov 08)

• A CD set “Your baby can read” is introduced.

• Also engaged an expert with Ph.D Robert C. Titzer, an expert on studying reading ability for kids credentials to be a spokesperson for the brand and appear at roadshows.

• PR coverage: Over 15 articles monitored
How to take advantage of your kid’s brain when it’s still supple and flexible

21st Jul – Tiep Thi & Gia Dinh

Abbot IQ institution program

24th Oct – Thanh Nien newspaper
Your kids can start to read when they are 9 months old
1st Aug – Thanh Nien newspaper
3rd Oct – Phu Nu HCMC newspaper

Stimulating and developing the 5 senses of the children
1st Aug – Sai Gon Tiep Thi
PR Coverage

To unlock the potential of a kid’s intelligence

7th Sep – Phu Nu HCMC Sunday

To unlock the potential of a kid’s intelligence
10th Sep – Phu Nu Vietnam
PR coverage

To unlock the potential of a kid’s intelligence program

1st Aug – Gia Dinh & Xa Hoi
1st Aug – Cong An HCMC
6th Aug – Nguoi Lao Dong
PR Coverage

Moms and kids learn how to read with the aid of their senses

1st Oct, Thanh Nien newspaper

IQ Institution – A trustful address for moms and kids

3rd Oct – Phu Nu HCMC newspaper
PR Coverage

Nutrition for brain
12th Sep – Phu Nu HCMC

1 day at IQ Institution
22nd Sep – The Giao Phu Nu
2. CSR - Milk donation program (Oct 2008)

- Donated 401 million VND worth of Similac EyeQ and Pediasure to poor orphans and malnutrition kids in 6 key provinces.

- In conjunction with this CSR activity, an advertorial was developed to drive awareness of their CSR in Vietnam.

Sponsorship of nutritious milk for orphans

*(5th Nov Ha Noi Moi newspaper)*
PR coverage

Community's responsibility of a prestigious company in Vietnam
24th Oct – Phu Nu HCMC newspaper

Children is the no.1 priority
29th Oct – Thanh Nien newspaper
3. “Overcoming refusal to eat” syndrome workshop (Nov 2008)

- Launched in conjunction with PediaSure to 700 doctors, nutritionists and parents
- 20% to 45% kids from 1 to 5 years old suffer from refusal to eat syndromes
- Engaged Professor Benny Kerzner whom is the Nutritionist of Nutritional Institution in US to be the spokesperson for this event.
- PediaSure BA provides the nutrition and can act as a meal replacement for kids suffering from this
3. "Refusal to eat" syndrome – Viet Trans tour – A day with PediaSure BA event

• Aside from "Refusal to eat" syndrome workshop, Abbott also held an event in Hanoi & HCMC named “Viet trans tour – A day with PediaSure BA”.

• At the event, 100 pediatricians consulted parents about "Refusal to eat" syndrome and solutions for their kids.
PR coverage

**Kids with "Refusal to eat" syndrome – A global issue**

30th Oct – Thanh Nien newspaper

**Kids with "Refusal to eat" syndrome – The possible solution**

20th Nov – Thanh Nien newspaper
“Refusal to eat” syndrome – More serious than you think

18th Nov – Phu Nu Vietnam newspaper

"Refusal to eat" syndrome, reasons, consequence & solution

29th Oct – Phu Nu VN newspaper
PR coverage

• "Refusal to eat" syndrome is more serious than you think.

• Children may not get enough essential nutrition for their comprehensive development.

• PediaSure – A nutritional formula that meets all the US and Europe standards, can help kids with "Refusal to eat" syndrome catch up with their growth.

• PediaSure is for kids from 1 – 10 years old.
4. Listen to your beloved baby forum

- Held in conjunction with Similac Mom to drive moms, moms to be share their sweet moments during their pregnancy
- Target: moms, pregnant moms
- Within 2 months, over 500 topics was received
Mead Johnson
1. Enfamama & DHA (Nov 2008)

- Driving the consumption of Enfamama by establishing the need for DHA before child birth amongst expecting mothers. Also during breastfeeding amongst lactating mothers.

- Initiative done via advertorials and direct mails.
PR coverage

Is your child supplied with enough DHA? (23rd Nov – Phu Nu Chu Nhat)

Does mom know the importance of DHA?

23th Oct – Thanh Nien newspaper

The invaluable gift from mom – 3rd Oct Thanh Nien newspaper
2. “Golden standard for infant nutrition” Seminar (8th Nov)

- Targeting doctors and mothers, MJ engaged Pheng Soon Lee, MJ Director in Asia Pacific as a spoke person

- Only 18.9% of infants (0-6 months) are breast fed which is extremely low

- 60% of parents incorrectly switch to infant formulas when kids are 4-5 months old

- General claims that MJ milk is very similar to mother’s milk, a clinical study in US states that babies that bring up by breast milk and MJ milk have the same development in height, weight, brain development, vision.

- PR coverage: Over 12 number of articles
Introducing the “Golden standard” in infant formula seminar

7th Oct – Tuoi Tre

More than 80% infants are not completely breast-fed in first 6 months

14th Oct – Phu Nu HCMC newspaper
PR Coverage

Introducing the “Golden standard in infant formula seminar

Nutritional Habits Influences
The Quality Of Breast Milk
The options and choices after breast milk

24th Nov – Sai Gon Tiep Thi
3. “Breast Milk is the best present for your child” forum (Nov – Dec 08)

• Targeting mothers with babies from 0-12 months

• Engaged a doctor, Ms. Le Thi Kim Qui, Director of Nutritional Center, HCMC to be the speaker for the forum.

• Drive moms to write their experience in bringing up baby by breast milk.

• Breast milk helps in the brain development of the child

• General claims that MJ milk is very similar to mother’s milk

• Branded Enfamama A+ event.
Breast milk makes kid more intelligent

18th Nov – Phu Nu HCMC newspaper

“Breast milk is the best present for kids” Forum

25th Nov – Phu Nu HCMC newspaper
End of forum: Breast milk – the invaluable gift for your baby” – Winner announcement
30 Dec – Phu Nu HCMC

I’m proud of giving my baby the best nutrition – breast milk
Golden standard in choosing milk
22nd Dec – Sai Gon Tiep Thi

Nutritional supplement when kid doesn’t have enough breast milk
26th Dec – Hanh Phuc Gia Dinh
Highlighted advertorial topic

• Topic: Which milk is the most similar with breast milk?

• Content:
  ‣ Understanding that breast milk is the best for infant’s comprehensive development, many milk brands have launched milk products which are claimed containing similar formula with breast milk.
  ‣ How parents can choose the best one for their kids? Highlights a clinical study in US that shows babies brought up by breast milk and MJ milk have the same development in height, weight, brain development and vision.
4. Advertorial series to promote Enfa A+

A series of advertorials to promote Enfa A+ that moms write their sweet memories about their baby’s first days.

They all choose and believe Enfa A+ is the best for their baby’s first days.

The first 2 topics were written and endorsed by mothers whom are also doctors.

When doctor choose milk for their kids

8th Dec – Nguoi Lao Dong
The story about how a doctor takes care of her babies

10th Dec – Sai Gon Tiep Thi

When doctor choose milk for their kids

10th Dec – Ha Noi Moi
4. Advertorial series to promote Enfa A+

Mom will do everything to bring me up

Mom will always pray and hope for my health and intelligence

12 Dec – Tiep Thi & Gia Dinh
5. Children’s "Inborn inability to absorb nutrition" disorder editorial series

• In launching a special milk for "Inborn inability to absorb nutrition" disorder for kids.

• In Vietnam, there are about 1,6 million kids born every year with this. 1 in 3000 suffer from this disease. In every 100 cases, around 50 cases are fatal. Every year, around 20 kids die from this disorder. Most of them are under 1 years old.

• Mead Johnson is the No. 1 milk brand in US, has supplied special nutritional product for this disease for over 50 years. MJ is currently sponsoring 5 products for 5 kinds of "Inborn inability to absorb nutrition" disorder disease in Vietnam.

• PR coverage : Over 8 number of articles
"Inborn inability to absorb nutrition" disorder in Children

(2nd Oct – Thanh Nien newspaper)

The Nutrition For kids with "Inborn inability to absorb nutrition" disorder (8th Oct – sai Gon Tiem Thi newspaper)

Special Milk - The Hope for kids with "Inborn inability to absorb nutrition" disorder

(10th Oct – Hanh Phuc Gia Dinh magazine)
1. The value of breast Milk Seminar (12th October 2008)

• Endorsed by Doctor Ms. Nguyen Thi Lam, VP of Nutritional Centre of Vietnam, TS Takeshi Takahashi, Head of Nutritional Research, Meiji Dairy Corporation.

• Sharing of research to claim Meiji has similar properties to mom’s milk

• PR advertorial to interview nutritionists about breast milk and Meiji: PhD. Nguyen Thi Lam – Vice president of VN Nutritional institution, PhD. Nguyen Gia Khanh – Head of Paediatrics – Hanoi Medical University and PhD. Takeshi Takahashi – Head of Nutritional Research, Meiji Dairy Corporation.

  › Also highlighted Meiji product in Vietnam is a safe milk, do not contain melamine.
The value of breast milk

22nd Oct – Nguoi Lao Dong Newspaper
2. Series of editorial about infant nutrition & breast milk

1. Breakthrough improvements in nutrition for kids (Oct 24\textsuperscript{th})

Endorsed by Doctor – Ms Ta Thi Tuyet Mai – Head of Nutritional dept of Gia Dinh hospital

Breast milk is the best milk for kids. Understanding the ideal benefits of breast milk, all infant milk brands continue to invest in R&D to produce milk that is closest to mother’s milk

Meiji is a prestigious milk brand and has a similar formula as breast milk.
2. Series of editorial about infant nutrition & breast milk

2. The usual questions about choosing milk for kids (Oct 31st)

Endorsed by Doctor Nguyen Thi Minh Kieu – Head of Nutritional Center

Address the melamine concerns and how it affect kids milk. How is the role of protein in infant milk?

Meiji is a prestigious milk brand that is free from melamine and has a similar formula as breast milk.

31st Oct, Phu Nu HCNC newspaper
2. Series of editorial about infant nutrition & breast milk

3. Criteria to choose milk for kids (Nov 2nd)

- Endorsed by Doctor dao Thi Yen Phi – Pham Ngoc Thach Medical University.

- Acknowledge that breast milk is ideal nutrition for infant under 6 months. Milk will continue to be 35% of their diet till they are 1 year’s old. Infant milk should be as close to breast milk as possible (i.e: contains all essential nutrient, vitamins and mineral for baby’s comprehensive development)

- Mentioned that Meiji is very similar mother’s milk.
2. Series of editorial about infant nutrition & breast milk

4. Difficulties of breast feeding faced by mothers (7th Nov)

- Acknowledges mother’s milk is the best but highlights issues faced by breastfeeding moms (lack of milk, mom is sick, mom doesn’t have breast milk in first few days after delivered baby, etc) in which case the brand has similar nutritional values as breast milk.

- Mentioned that Meiji is very similar mother’s milk.

7th Nov, Phu Nu HCMC newspaper
2. Series of editorial about infant nutrition & breast milk

5. What’s the best milk for kids? (9th Nov)

• Endorsed by Doctor Ms. Nguyen Thi Lam, Vice President of Nutritional Centre of Vietnam

• Moms are influenced by advertising of infant formulas but establishes mother’s milk is the best. Meiji has a similar ingredient Lactadherin which is present in mother’s milk.
2. Series of editorial about infant nutrition & breast milk

6. Bringing up the baby in the 1st year (16th Nov)

Education on the nutritional needs for kids in the 1st 12 months in which supplements are encouraged when the baby is 4-6 months old. Also features a section on how to choose milk.

Meiji is the most popular milk in Japan and established in Vietnam as well.

Meiji Merry Mama and Meiji Merry 3.

16th Nov – Phu Nu Chu Nhat
2. Series of editorial about infant nutrition & breast milk

7. Nutritional demands and development needs of babies in the 1st year. (Nov 17th)

Endorsed by Doctor Nguyen Lan Dinh, Director of Nutritional centre for kids

Establishes the nutritional requirements for brain, height, immunity, weight development.

Meiji is the most popular milk in Japan and established in Vietnam as well.

Meiji Merry Mama and Meiji Merry 3.

17th Nov – Tiep Thi & Gia Dinh magazine
Vinamilk
1. Editorial series on how to choose milk for kids

- Ingredient of the milk should be the first criteria to choose milk for kids, not the price.

- Dielac Alpha was the 1st brand to add Colostrum from fresh milk which helps kid to strengthen their immune system.

- Dielac Alpha also provides DHA, Omega3, Omega6, Choline, Canxi, FOS, Vitamin D which suits the nutritional needs of Vietnamese kids.

- Dielac Alpha is made in Vietnam with high quality imported materials at a reasonable price.

Choosing expensive or intelligent milk
1st Jul - Vinamilk
1. Editorial series about How to choose milk for kids

- Endorsed by Doctor Dao Yen Thuy, from the Nutritional centre for kids.

- Nutritional value should be the first criteria to choose milk for kids, not the additional ingredient.

- The nutritional value and additional ingredient of Dielac – Vinamilk is almost similar to other expensive imported brands.

- Mothers who have average income should choose the milk with reasonable price to assure that they can afford to provide their kids milk in a long term, especially during this difficult time.
1. Editorial series about How to choose milk for kids

- Milk price increased 5 – 20%, especially the imported brands. Only Dielac still maintains the same price.

- Endorsed by Doctor Nguyen Trong An, vice minister of Children Protection Office: mothers should be careful with the expensive foreign milks which have not been gone through quality test from MOH.

- Different milk will be required for different kids because of their different digestive systems.
1. Editorial series about How to choose milk for kids

- Milk price increases with a new packaging, but actually the product is still the same.

- Endorsed by Doctor Dao Yen Thuy, from Nutritional centre for kids: basic nutritional value should be the first criteria in choosing milk for kids to ensure kids can grow in term of height, weight, muscle and brain.

- The kid intelligence is not only dependent on nutrition, but also heredity, living environment and the education he gets.

- The nutritional value and additional ingredient of Dielac – Vinamilk is similar to other expensive imported brands.

- Mothers who have average incomes should choose the milk with reasonable price to ensure they can afford to provide their kids milk in the long term.
1. How to choose milk for kids editorial series

• Endorsed by Doctor Dao Yen Thuy, from Nutritional centre for kids: basic nutritional value should important be the first criteria to choose milk for kids.

• Mothers should choose milk which has enough basic nutritional value and reasonable price such as Dielac Vinamilk.

• The imported milk is expensive mostly because of import tax, expensive foreign labor cost and not because of its high quality.
1. Editorial series about How to choose milk for kids

- The imported milk is expensive mostly because of import tax, expensive foreign labor cost and not because of its high quality.

- Endorsed by Doctor Dao Yen Thuy from Nutritional centre for kids: basic nutritional value should important be the first criteria in choose milk for kids that can assure growth in term of height, weight, muscle and brain.

- Mothers who have average incomes should choose the milk with reasonable prices to ensure they can afford to provide their kids with milk in the long term.
1. Editorial series about How to choose milk for kids

• Headline: Customers caught in a whirlwind

• Interviews with customers about their worries when choosing milk for their children during the melamine scandal

• Mention Vinamilk as the safe and credible solution

• Interviewees: both celebs (Model Anh Thu), and normal people

15th Oct – Cam Nang Mua Sam magazine
2. "Refusal to eat" syndrome advertorial series

- “Malnutrition – supplement by Dielac Pedia – Supplying nutrition on time for your kids”
- To inform the symptoms and consequences of "Refusal to eat" syndrome amongst infants.
- To introduce Dielac Pedia of Vinamilk with many new added nutrition as a specialized solution for this issue
2. "Refusal to eat" syndrome advertorial series

• What do kids with “Refusal to eat” syndrome need?

• To inform the symptoms and consequences of "Refusal to eat" syndrome amongst infants.

• To introduce Dielac Pedia of Vinamilk with many added nutrition as a specialized solution for this issue
3. Trend to choose safe milk editorial series

• **Headline**: The way to choose milk that is safe for your kids.

• Milk provides important nutrition for kids which can not be replaced by other foods.

• Mothers tend to choose milk for their safety rather than nutrition. Mothers should read the labels of the milk.

• Dielac Vinamilk is made from the imported materials from Europe and America and passed the quality test from MOH.

• Dielac Vinamilk is 100% safe for your kids.
3. Trend to choose safe milk editorial series

- Headline: “We want the prestigious milk brand only”

- Choosing milk carefully is the most important criteria to prepare the daily meal for kids.

- Dielac Vinamilk is made from the imported material from Europe and America and had been passed the quality test from MoH (Ministry of Health)

- Dielac Vinamilk is 100% safe to your kids.
3. Trend to choose safe milk editorial series

- Headline: “Seeing is believing”

- Dielac Vinamilk is produced by a strict production line which always meet the quality standard from MOH.

- Dielac Vinamilk is not only sole on Vietnam market but also exported to the Europe, Middle East and Australia.

- Dielac Vinamilk does not contain Melamine and 100% safe to your kids.
DUMEX
1. Walk together with the child Gameshow

• Introduce the show “Walk together with the child” sponsored by Domex Gold, in which shares experience and instruction to raise up the child strong and healthy.

• The gameshow is on HTV7 Wednesday from 19.30 to 19.45
1. ProPlus – Immune Strengthening from inside seminar

- “Proplus- Strengthen the immune system from within”
- To notify the conference “Proplus- Immune Strengthening From Inside” sponsored by Milex Milk Company.
- Endorsed by Dr. Dinh Phuong Anh, Central Obstetrics Hospital

Proplus - Immune Strengthening From Inside

2nd Aug – Tuoi Tre
2. Introduce Milex and its Western quality advertorial series

- “Milex and inquiries from Vietnamese mothers”

- To answer questions about the origin and difference of Milex vs other players in the market (i.e.: 100% imported from Denmark, )
2. Introduce Milex and its Western quality advertorial series

- Interview Mr. Carsten- R&D Director of Arla Foods
- Introduce Arla as the special milk for astronauts at NASA with Probiotic nutrition
- Introduce Probiotic A,B,C and prebiotic in children milk, Milex

20th Oct – Phu Nu Thu Do Newspaper
2. Introduce Milex and its Western quality advertorial series

- Western standards for food safety
- Reinforces that Milex fulfills all requirements from Europe and it’s commitment to children’s health

21st Nov – Hanh Phuc Gia Dinh newspaper
2. Introduce Milex and its Western quality advertorial series

Milex milk for kids – 100% packed and imported from Denmark
12\textsuperscript{th} Nov – Thanh Nien / 15\textsuperscript{th} Nov – Tiep Thi & Gia Dinh
Nutifood
1. "Refusal to eat" syndrome

- **Headline**: Help the "Refusal to eat" syndrome kids to catch up with growth

- **Pedia Plus MCT, Lysine, FOS, acid Linoleic, acid Alpha Linderic, DHA, ARA, Choline & Taurin** will provide the best nutrition to your kids with the delicious taste at a reasonable price.

- **Promotion 24/11-31/12/0**: Free kid’s watch with any purchase of PediaPlus 400g can get a free machine that teaches Vietnamese pronunciation with any purchase of PediaPlus 900g can.

19th Dec – Hanh Phuc Gia Dinh
2. Why we should drink milk everyday - advertorial

• Explains the importance of drinking milk everyday, for both children and adults

• Introduces Nuti Milk from NutiFood

• Inform the promotional program from Nuti Milk

9th Nov, Phu Nu Vietnam
Issue of price increase (July till November)
The price increase

• **1st Price Increase:**
  - 1st of July 2008, most of imported milk brands announced a price increase of 7% -15%.
  - Manufacturers explained this was due to the increase of imported raw material cost, transportation cost (petrol price had increased sharply from VND13,000/L to VND 19,000/L).
  - Some other brands kept their price but reduced net quantity instead (i.e: Similac: 800gram instead of 900gram, Vinamilk: 220ml instead of 250ml).

2nd Price increase

- Mid of July, imported milk increased price the 2nd time within 1 month 6%-10%.
- Manufacturers cited the increase was due to increased price of oil, etc

3rd Price increase

- By mid of Nov, again, imported milk price increased 7%-10% despite lower cost of production (petrol price is back to VND 11,000/L) and reduced taxes
Consumers’ outrage over the price increases

• Consumers were really upset but they had to suffer as milk is a necessity for kids. It would be torturous for parents to think about scrimping on such an essential item for their child.

• Consumers had to choose the lower priced milk and as it was constantly increasing. They had to alter their buying behavior, stocking up to 4-5 packs each time they buy.
Wide coverage on all newspapers / magazines over the price increase

16th Jul – Tuoi Tre

More milk brands increase price

12th Jul – Doi Song & Phap Luat

Milk price constantly increases

17th Jul – Suc KHoe & Doi SOng

Milk price constantly increases
Wide coverage on all newspapers / magazines over the price increase

Hanoi Consecutively Adjusts Prices

Milk Races To Increase Prices

Original Prevention From Risk Of Price Increasing
Wide coverage on all newspapers / magazines over the price increase

The absurdity of increasing milk price

30th Nov – Phu Nu Chu Nhat

Milk price increases, is it due to bad administration?

29th Nov – Binh DUong
Wide coverage on all newspapers / magazines over the price increase

Milk products are ready to increase price
26th Nov – Kinh Te VN

Milk increases price, importer gains 50% interest.
25th Nov – Nguoi Lao Dong newspaper

Imported raw material reduces price – Milk price stay still and … increase – (20th Nov – Sai Gon Tiep Thi)
Wide coverage on all newspapers / magazines over the price increase

Again, imported milk increases price

15th Dec – The Gioi Tieu Dung

25th Nov – Vietnam News
The government was also blamed for a lack of response

- Government had no feedback or reaction to protect consumer rights. Some of articles addressed if the price crisis is due to bad administration of government.
Response from brands that kept on increasing prices

• Most of increased price brands claimed that it’s due to the increase of imported raw material cost, transportation cost, the fluctuation of exchange rate and bank interest rate.

Milk is increasing again

5th Jul – Tuoi Tre
Response from brands that maintained their prices

• Milex kept their price stay still and covered by advertorial “Milex is not increasing its price, a good choice for moms”.
  ‣ Acknowledge the fluctuation of exchange rates, increase of transportation cost and imported raw material cost, all imported dairy product are the cause of the increase in price.
  ‣ However, as a plan to develop long term business in Vietnam market, Milex would like to keep current price to support consumers. They still can choose the best milk for their beloved kids.
Milex does not increase in price – A good choice for mothers. (Aug 08 – Tuoi Tre)

Milex does not increase in price – Release parents stress (Aug 08 – Thanh Nien)
Some brands maintained the price but took a step further with a promotion

- Nutifood launched a promotion to take advantage of the consumer’s behaviour change (both for adults and kids) during this crisis. Nutifood not only maintained the price but consumer can get more discount when buying product (i.e: get VND10,000 for 500gram pack, VND 5,000 for 400gram pack).

12th Sep – Hanh Phuc Gia Dinh
Conclusion

Despite the negative press from the overall issue, the attention given to this has since died down.

Consumers have generally accepted the price increase, albeit unhappily. A research by AC Nielsen on the effects of inflation showed that consumers will continue to spend on infant formula and milk due to its importance.
Issue of Melamine
The Issue

The scandal broke in late of July in China, involving milk and infant formula, and other food materials and components, which had been contaminated with melamine. With China's wide range of export food products, the scandal has affected countries all over the continents.

In November China reported an estimated 300,000 victims have been claimed: six infants have died from kidney stones and other kidney related problems, 860 babies hospitalized. The chemical appeared to have been added to milk in order to cause it to appear to have a higher protein content.
Early Oct 2008, Hanoi Health Dept officially announced there were 8 milk products imported from China containing melamine, starting a checking frenzy on all dairy products in Vietnam.

Consumers were worried and didn’t know exactly which brand was safe for their kids. Most of them chose to reduce milk and replace it with other foods.
Melamine was found in established brands in US fueled the panic

Melamine found In US Formula

27th Nov – Nguoi lao Dong newspaper
Kindergartens haven’t announced milk quality they’re using yet

(2nd Oct – Nguoi Lao Dong newspaper)
The brands’ response to the issue
All brands had a quick reaction to the issue. They all got their product tested by prestigious health organizations.

There’s no melamine in Enfamil Lipil of MJ in US

3rd Dec – Thanh Nien & Tuoi Tre
Announced their “Free of melamine” certification
Supported it with advertorials and press releases

There’s no melamine in Enfamil Lipil of MJ in US
3rd Dec – Thanh Nien & Sai Gon Tiep Thi

There’s no melamine in product of Mead Johnson Vietnam, Malaysia, Singapore.
3rd Oct – Sai Gon Tiep Thi newspaper
Supported it with advertorials and press releases

Meji Pledges With The Consumers Not Producing Malamine-tained Milk
(6th Oct – Thanh Nien newspaper)

Nestle Milk Is Safe For health
(10th Oct – Phu Nu HCMC Sunday magazine)
Supported it with advertorials and press releases

Dumex does not contain melamine
(16th Oct – Cong Thuong newspaper)

Dumex ensure their product quality in Vietnam
(2nd Oct – Cong An HCMC newspaper, 3rd Oct – Thanh Nien newspaper)
Supported it with advertorials and press releases

There's no melamine in Milex product
(3rd Oct – Thanh Nien newspaper)

Milex milk for kids – 100% packed and imported from Denmark
(1st Oct – Phu Nu Thu Do newspaper)
Supported it with advertorials and press releases

**FDA: Không phát hiện melamine trong các mẫu sữa của Abbott**

Ngày 26.11.2008, cơ quan Quản lý được phẩm và thực phẩm Hoa Kỳ (FDA) đã công bố: "Không phát hiện melamine trong bất kỳ sản phẩm dinh dưỡng nào trong 18 mẫu sữa của Abbott có mặt trên thị trường Mỹ được kiểm định". Kết quả này cùng giống với các kết quả kiểm nghiệm melamine được tiến hành bởi các cơ quan chức năng có thẩm quyền của Bộ Y tế Việt Nam đối với các sản phẩm dinh dưỡng của Abbott đang lưu hành trên thị trường Việt Nam.

**Nutifood vận hành dây chuyền sản xuất sữa bột siêu sạch**

Công ty CP Thực phẩm dinh dưỡng Đông Tâm - Nutifood vừa lập đặt dây chuyền công nghệ sản xuất sữa bột mới nhất, có tính năng sản xuất siêu sạch. Đây là hệ thống thiết bị của hãng WOLF (Đức) trị giá hơn 60 tỷ đồng, tự động hoàn chỉnh từ khâu vệ sinh, thiết trí lon đến khấu thành phẩm, bao gồm cả việc bơm khí trước trong quá trình chế biến nhằm hạn chế oxi trong sản phẩm, tăng tuổi thọ của sữa. Ngoài việc đầu tư công nghệ mới, Nutifood cũng yêu cầu nhà cung cấp từ Ó-xtray-ly-i-a, Niu-di-lan, Đan Mạch đồng thời với cơ quan y tế trong nước kiêm nghiệm nhằm ngăn chặn nguồn gốc độc tố, đặc biệt là chất mê-la-min, xâm nhập trong nguyên liệu. Đến nay, doan kiểm tra liên ngành của Chính phủ cũng đã hoàn tất việc kiểm tra hoạt động sản xuất kinh doanh tại nhà máy của Nutifood, kết quả cho thấy Nutifood không sản xuất sữa từ nguyên liệu Trung Quốc và bảo đảm các tiêu chuẩn ATVSTP của Bộ Y tế.

30th Nov – Thanh Nien

15th Nov – Thanh Nien
Encouraged consumers to start consuming again via endorsements and assurance of safety

- (Vinamilk, Mead Johnson & Milex) Developed general editorial highlighting the importance of milk and advice consumers not to reduce their milk consumption. Reinforce Vinamilk / Mead Johnson / Milex are melamine free.

- Endorsed by principal of Sao Mai kindergarten – Ms My Dung: talked melamine issue, and highlighted that they just use famous brands and mentioned Vinamilk is safe for consumption.
Encouraged consumers to start consuming again via endorsements and importance of milk to baby’s diet

(Vinamilk) Mom, do not reduce my milk

23rd Oct – Phu Nu VN weekend

(Mead Johnson) Milk is very necessary for kids

17th Oct – Thanh Nien newspaper
Some brands positioned themselves as experts by providing advice on how to choose milk.
Some brands positioned themselves as experts by providing advice on how to choose milk.

Mom chooses milk for kid in melamine crisis (Abbott) – 10th Oct – Suc KHOe Doi Song magazine
Launched on ground campaigns to drive consumption again

- Mead Johnson launched “The safe month of drinking milk in post period of melamine” event.

- Mead Johnson supplied safe & high quality milk for 40 kindergartens in Hanoi & HCMC at half of price.

- Promoted for Enfagrow A+ and Enfakid A+

29th Oct – Sai Gon Giai Phong newspaper
Launched on ground campaigns to drive consumption again

Safe month of drinking milk: Drink safe milk is not an issue now.
(31st Oct – Phu Nu Thanh Pho newspaper)

Safe month of drinking milk: cooling “the thirst” of safe milk in kindergartens
(31st Oct – Saigon Tiep Thi Magazine)

“safe month for drinking milk” in post period of Melamine
(2nd Nov – Tuoi Tre)
Conclusion

The issue in Vietnam died down at the end of 2008 largely due to the tight checks and inspections from the government. The cooperation between the government and brands helped to calm and stabilize the market.

No fatalities or hospitalization occurred in Vietnam from this scare.
Value of the earned media, for public relations, advocacy or PSA
Value of the earned media, for public relations, advocacy or PSA

<table>
<thead>
<tr>
<th>Brands</th>
<th>PR Value</th>
</tr>
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<tbody>
<tr>
<td>Abbott</td>
<td>VND 3,291,550,766</td>
</tr>
<tr>
<td>Mead Johnson</td>
<td>VND 3,516,949,736</td>
</tr>
<tr>
<td>Meiji</td>
<td>VND 404,080,518</td>
</tr>
<tr>
<td>Vinamilk</td>
<td>VND 1,483,420,339</td>
</tr>
<tr>
<td>Arla / Milex</td>
<td>VND 973,529,002</td>
</tr>
<tr>
<td>Nutifood</td>
<td>VND 324,931,866</td>
</tr>
</tbody>
</table>
Role of mass media in the advertising/marketing of feeding practices, infant formula and foods, and other nutrition products
Role of mass media in the advertising/marketing of feeding practices, infant formula and foods, and other nutrition products

- TV remains the most reach driven channel to build and strengthen branding and awareness particularly for new player or new product. (Average over 80% of media spend is for TV)
  - Thematic messages
  - Promotion messages
Role of mass media in the advertising/marketing of feeding practices, infant formula and foods, and other nutrition products

- Print is a channel to support TVC key message
- Thematic to support thematic TVC
- Tactical print to support promotions, new packaging announcement
Role of mass media in the advertising/marketing of feeding practices, infant formula and foods, and other nutrition products

- Due to the Decree 21 about advertising of MoH: “Should not advertise infant milk for infants who are under 1 year’s old” moreover TV & print have to be approved both visual and copy strictly by Ministry of Health, other channels such as paid advertorials, editorial (press releases), seminar, event, trade activity, CRM are effective channels:

<table>
<thead>
<tr>
<th>Channels</th>
<th>Role</th>
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<tbody>
<tr>
<td>Advertorials / Editorials</td>
<td>- To educate consumer about brand and product</td>
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<tr>
<td></td>
<td>- To support events, seminars</td>
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<tr>
<td></td>
<td>- To respond to issue that may occurred (i.e: price increase, melamine)</td>
</tr>
<tr>
<td>Seminar</td>
<td>- To show thought leadership</td>
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<tr>
<td></td>
<td>- Provide platform for engaging with health organizations, experts and media</td>
</tr>
<tr>
<td>CRM</td>
<td>- To build one to one relationship with target</td>
</tr>
<tr>
<td>Other activities (forums / events / trade activities)</td>
<td>- To build consumer data and drive sales volume</td>
</tr>
</tbody>
</table>
Appendix
Feeding practice figure

• Only 18.9% newborns were completely breast-fed in 1st 6 months. (*Source: Vietnam Nutritional Institution – Article on Phu Nu HCMC dated 14th Oct*)

• 100% newborns below 1 year old were fed milk powder and other nutrition. (*Source: AC Nielsen – Milk powder – Incidence report, this data can be bought from AC Nielsen*)
Thank You