

# COMPETITIVE PROMOTION REPORT

## HBC INDUSTRY OVERVIEW

Total Number Active Deals for current year 36026

By Category

12 Mos. Ending  
March 31,2003

<u>Category</u>	<u>Total Numbers of Deals</u>			<u>Share of Deals by Type</u>					
	<u>Deals</u>	<u># Brands</u>	<u>Avg # of Deals per Brand</u>	<u>Contrac</u>	<u>Bracket</u>	<u>Off</u>	<u>Bill</u>	<u>Extra</u>	
				%	%	%	%	%	%
VITAMINS	3423	85	40.3	55.4%	0.0%	40.2%	6.2%	0.0%	1.3%
HAIR SHAMPOO/CONDITIONER	3262	61	53.5	60.3%	0.0%	49.4%	6.0%	0.0%	0.0%
DEODORANTS	2076	31	67.0	68.6%	0.0%	29.5%	13.7%	0.0%	0.0%
BABY PRODUCTS	1828	49	37.3	46.4%	0.0%	39.1%	21.0%	0.0%	0.0%
COSMETICS-MAKE UP	1666	47	35.4	93.1%	0.0%	19.7%	1.5%	0.0%	0.8%
COUGH & COLD-INTERNAL	1566	48	32.6	66.1%	0.0%	32.8%	13.3%	0.5%	0.4%
SKIN CARE	1484	65	22.8	74.5%	0.0%	19.7%	8.6%	0.0%	0.3%
SHAVING PRODUCTS	1480	57	26.0	73.0%	0.0%	36.5%	9.2%	0.8%	0.0%
TOOTHPASTE	1413	28	50.5	48.5%	0.0%	34.3%	23.1%	0.0%	0.2%
HAIR COLORING	1406	33	42.6	98.8%	0.0%	26.7%	0.1%	0.0%	0.4%
COUGH & COLD-EXTERNAL	1362	49	27.8	58.5%	0.0%	28.6%	21.1%	0.0%	0.1%
DIET	1349	50	27.0	47.1%	0.0%	35.3%	8.1%	0.0%	0.3%
HAIR STYLING	1334	42	31.8	70.5%	0.0%	43.4%	2.6%	0.0%	0.0%
BATH PRODUCTS	1306	52	25.1	75.0%	0.0%	32.8%	8.0%	0.0%	0.0%
ANALGESIC-INTERNAL	1264	35	36.1	71.6%	0.0%	29.0%	11.2%	0.3%	1.1%
FIRST AID	1186	40	29.6	80.3%	0.0%	48.8%	7.6%	0.7%	0.0%
FEMININE HYGIENE	1119	22	50.9	76.5%	0.0%	22.6%	10.1%	0.0%	0.0%
DENTAL PRODUCTS	911	21	43.4	62.2%	0.0%	27.8%	17.5%	0.0%	0.2%
ANTACIDS	822	33	24.9	72.5%	0.0%	30.9%	5.6%	2.9%	0.0%
HOME HLTH. CARE/SICKRM. SUPPL.	780	23	33.9	87.8%	0.0%	79.9%	1.0%	0.0%	0.3%
ORAL HYGIENE	657	36	18.3	66.7%	0.0%	35.2%	12.0%	0.0%	1.1%
EYE/EAR PRODUCTS	625	53	11.8	80.0%	0.0%	46.9%	7.4%	0.0%	0.3%

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## HBC INDUSTRY OVERVIEW

Total Number Active Deals for current year 36026

By Category

12 Mos. Ending  
March 31, 2003

<u>Category</u>	<u>Total Numbers of Deals</u>			<u>Share of Deals by Type</u>					
	<u>Deals</u>	<u># Brands</u>	<u>Avg # of Deals per Brand</u>	<u>Contra</u> %	<u>Bracket</u> %	<u>Off</u> %	<u>Bill</u> %	<u>Extra</u> %	<u>Extra</u> %
SUN CARE	543	18	30.2	63.7%	0.0%	42.7%	14.5%	0.0%	0.2%
HAIR CARE ACCES & GROOMING	428	45	9.5	52.6%	0.0%	11.7%	46.0%	0.0%	0.0%
ACNE	412	15	27.5	83.0%	0.0%	26.9%	3.2%	0.2%	1.2%
LAXATIVES/DIARRHEALS/EMETICS	373	26	14.3	77.2%	0.0%	27.6%	5.6%	0.0%	0.0%
FOOT PREPARATIONS	369	22	16.8	88.1%	0.0%	22.0%	2.7%	0.5%	2.2%
TOILETRIES/MEN-WOMEN	307	27	11.4	96.1%	0.0%	0.3%	3.6%	0.0%	0.0%
ANALGESIC-EXTERNAL	262	26	10.1	66.0%	0.0%	35.5%	5.3%	4.6%	7.3%
FAMILY PLANNING	257	14	18.4	84.0%	0.0%	35.0%	1.6%	1.2%	0.0%
HOME REMEDIES	190	22	8.6	85.8%	0.0%	15.8%	1.6%	0.0%	0.5%
DENTURE PRODUCTS	184	18	10.2	76.1%	0.0%	21.7%	4.3%	0.0%	1.6%
TOPICAL PREPARATIONS	172	24	7.2	70.3%	0.0%	31.4%	9.9%	0.0%	5.8%
HAIR CARE-MEN'S	114	12	9.5	100.0%	0.0%	25.4%	0.0%	0.0%	0.0%
DIABETIC PRODUCTS	96	11	8.7	54.2%	0.0%	65.6%	2.1%	4.2%	10.4%
<b>REPORT TOTALS</b>	<b>36026</b>	<b>1240</b>	<b>29.1</b>	<b>68.4%</b>	<b>0.0%</b>	<b>34.8%</b>	<b>9.7%</b>	<b>0.2%</b>	<b>0.5%</b>

# COMPETITIVE PROMOTION REPORT

## HBC INDUSTRY OVERVIEW

Total Number Active Deals for current year 199

By Category & Manufacturer

12 Mos. Ending  
March 31, 2003

Category - ANALGESIC-EXTERNAL

### Total Numbers of Deals

<u>Manufacturer</u>	<u>Deals</u>	<u># Brands</u>	<u>Avg # of Deals per Brand</u>	<u>Share of Deals by Type</u>					
				<u>Contract Pricing %</u>	<u>Bracket Pricing %</u>	<u>Off Invoice %</u>	<u>Bill Back %</u>	<u>Extra Dating %</u>	<u>PM %</u>
CHATTEM	66	7	9.4	98.5%	0.0%	0.0%	1.5%	0.0%	0.0%
PROCTER & GAMBLE - HEALTH CARE	26	1	26.0	23.1%	0.0%	61.5%	19.2%	0.0%	0.0%
W F YOUNG	23	1	23.0	8.7%	0.0%	87.0%	0.0%	26.1%	26.1%
PRIVATE LABEL	14	1	14.0	71.4%	0.0%	85.7%	0.0%	0.0%	0.0%
PFIZER CONSUMER	12	1	12.0	91.7%	0.0%	50.0%	0.0%	0.0%	0.0%
DEL PHARMACEUTICALS	9	1	9.0	100.0%	0.0%	0.0%	11.1%	0.0%	0.0%
MENTHOLATUM	9	1	9.0	66.7%	0.0%	0.0%	33.3%	0.0%	0.0%
PRINCE OF PEACE	8	1	8.0	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%
BIOGLAN PHARM	6	1	6.0	0.0%	0.0%	100.0%	0.0%	0.0%	50.0%
NATUROPATHIC LABS	6	1	6.0	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SMARTSCIENCE	4	1	4.0	75.0%	0.0%	75.0%	25.0%	0.0%	0.0%
ZILA	3	1	3.0	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%
HISAMITSU AMERICA	3	1	3.0	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%
NFI DIETARY	3	1	3.0	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%
PLAYTEX	2	1	2.0	0.0%	0.0%	50.0%	50.0%	0.0%	0.0%
BRISTOL-MYERS	1	1	1.0	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%
NOVARTIS	1	1	1.0	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%
MEDTECH	1	1	1.0	100.0%	0.0%	0.0%	0.0%	0.0%	100.0%
NATURE'S BOUNTY	1	1	1.0	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%
BOIRON INC.	1	1	1.0	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OAKHURST COMAPNY	0	0	0.0	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
FINEST HEALTH PRODUCTS	0	0	0.0	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%



# COMPETITIVE PROMOTION REPORT

## HBC INDUSTRY OVERVIEW

By Category & Manufacturer

12 Mos. Ending  
March 31, 2003

<u>Manufacturer</u>	<u>Total Numbers of Deals</u>			<u>Share of Deals by Type</u>					
	<u>Deals</u>	<u># Brands</u>	<u>Avg # of Deals per Brand</u>	<u>Contract Pricing</u> %	<u>Bracket Pricing</u> %	<u>Off Invoice</u> %	<u>Bill Back</u> %	<u>Extra Dating</u> %	<u>PM</u> %
US DERMATOLOGICS	0	0	0.0	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
PONT FLORES	0	0	0.0	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Category Totals</b>	<b>199</b>	<b>26</b>	<b>7.7</b>	<b>63.8%</b>	<b>0.0%</b>	<b>38.2%</b>	<b>6.0%</b>	<b>3.0%</b>	<b>5.0%</b>

# COMPETITIVE PROMOTION REPORT

## HBC INDUSTRY OVERVIEW

By Category & Manufacturer

12 Mos. Ending  
March 31,2003

<u>Manufacturer</u>	<u>Total Numbers of Deals</u>			<u>Share of Deals by Type</u>					
	<u>Deals</u>	<u># Brands</u>	<u>Avg # of Deals per Brand</u>	<u>Contract Pricing</u> %	<u>Bracket Pricing</u> %	<u>Off Invoice</u> %	<u>Bill Back</u> %	<u>Extra Dating</u> %	<u>PM</u> %
REPORT TOTALS	199	26	7.7	63.8%	0.0%	38.2%	6.0%	3.0%	5.0%



# EXECUTIVE SUMMARY TRADE PROMOTION ANALYSIS

12 Mos. Ending  
March 31,2003

Category - ANALGESIC-EXTERNAL

TOTAL DEALS IN CATEGORY: 199

TOTAL MANUFACTURERS OFFERING: 41

Promotion Type	Net #	Net Share		Change	#Mfg's Offering		Change	#Brands Offered		Change	#SKU's Offered		Change
	TotalDeals	Previous	Current	%	Previous	Current	%	Previous	Current	%	Previous	Current	%
Contract Priced, EDLP	127	24.6%	63.8%	61.4%	16	14	-12.5%	19	19	0.0%	51	70	27.1%
Bracket Priced	0	5.0%	0.0%	-100.0%	1	0	-100.0%	1	0	-100.0%	13	0	-100.0%
Promotion Priced, OI	76	55.8%	38.2%	-31.5%	13	10	-23.1%	18	10	-44.4%	51	36	-29.4%
Promotion Priced, BB	12	16.9%	6.0%	-64.4%	7	6	-14.3%	10	6	-40.0%	27	7	-74.1%
Extra Dating	6	14.6%	3.0%	-79.4%	3	1	-66.7%	3	1	-66.7%	14	6	-57.1%
P.M.	10	21.2%	5.0%	-76.2%	5	3	-40.0%	5	3	-40.0%	21	10	-52.4%

# EXECUTIVE TRADE REPORT

Category - ANALGESIC-EXTERNAL

12 Mos. Ending  
March 31,2003

Company	Number of Deals	Number of Brands on deal		Number of SKUs on deal		Average % of Invoice Allowance		Average % of Billback Allowance		Extra Dating
		Previous	Current	Previous	Current	Previous	Current	Previous	Current	
<b>BIOGLAN PHARM</b>										
	6	1	1	3	5	3.0%	3.0%	0.0%	0.0%	None
<b>BOIRON INC.</b>										
	1	1	1	1	1	0.0%	0.0%	0.0%	0.0%	None
<b>BRISTOL-MYERS</b>										
	1	1	1	3	1	0.0%	0.0%	10.0%	0.0%	None
<b>CHATTEM</b>										
	66	6	7	13	28	11.1%	0.0%	7.3%	0.0%	None
<b>DEL PHARMACEUTICALS</b>										
	9	1	1	7	6	2.9%	0.0%	9.0%	0.0%	None
<b>FINEST HEALTH PRODUCTS</b>										
	0	1	0	1	0	4.5%	0.0%	0.0%	0.0%	
<b>HISAMITSU AMERICA</b>										
	3	1	1	3	3	0.0%	0.0%	0.0%	0.0%	None
<b>MEDTECH</b>										
	1	1	1	1	1	0.0%	0.0%	0.0%	0.0%	None
<b>MENTHOLATUM</b>										
	9	1	1	6	4	6.2%	0.0%	10.5%	10.5%	None
<b>NATURE'S BOUNTY</b>										
	1	0	1	0	1	0.0%	6.2%	0.0%	0.0%	None
<b>NATUROPATHIC LABS</b>										
	6	1	1	6	6	5.0%	0.0%	0.0%	0.0%	None

# EXECUTIVE TRADE REPORT

12 Mos. Ending  
March 31, 2003

Company	Number of Deals	Number of Brands on deal		Number of SKUs on deal		Average % of Invoice Allowance		Average % of Billback Allowance		Extra Dating
		Previous	Current	Previous	Current	Previous	Current	Previous	Current	
<b>NFI DIETARY</b>										
	3	0	1	0	1	0.0%	0.0%	0.0%	0.0%	None
<b>NOVARTIS</b>										
	1	1	1	1	1	0.0%	0.0%	0.0%	0.0%	None
<b>OAKHURST COMAPNY</b>										
	0	1	0	1	0	0.0%	0.0%	7.3%	0.0%	
<b>PFIZER CONSUMER</b>										
	12	1	1	18	6	9.5%	6.6%	4.7%	0.0%	None
<b>PLAYTEX</b>										
	2	0	1	0	1	0.0%	0.0%	0.0%	0.0%	None
<b>PONT FLORES</b>										
	0	1	0	1	0	0.0%	0.0%	0.0%	0.0%	
<b>PRINCE OF PEACE</b>										
	8	1	1	6	6	3.0%	2.0%	0.0%	0.0%	None
<b>PRIVATE LABEL</b>										
	14	1	1	4	7	14.6%	18.4%	0.0%	0.0%	None
<b>PROCTER &amp; GAMBLE - HEALTH CARE</b>										
	26	1	1	4	6	26.6%	10.1%	0.0%	0.0%	None
<b>SMARTSCIENCE</b>										
	4	1	1	2	2	0.0%	5.0%	0.0%	0.0%	None
<b>US DERMATOLOGICS</b>										
	0	1	0	2	0	5.0%	0.0%	0.0%	0.0%	

# EXECUTIVE TRADE REPORT

12 Mos. Ending  
March 31,2003

Company	Number of Deals	Number of Brands on deal		Number of SKUs on deal		Average % of Invoice Allowance		Average % of Billback Allowance		Extra Dating
		Previous	Current	Previous	Current	Previous	Current	Previous	Current	
<b>W F YOUNG</b>										
	23	1	1	11	6	3.8%	3.2%	0.0%	0.0%	2%60 NET 61
<b>ZILA</b>										
	3	1	1	3	3	0.0%	0.0%	0.0%	0.0%	None
Category Totals	199	26	26	97	95	7.9%	6.8%	8.1%	10.5%	

# COMPETITIVE PROMOTION REPORT

## AVERAGE DISCOUNT PER DEAL

Total HBC Deals for current year: 36,026

- By Category -

12 Mos. Ending  
March 31,2003

Category	Previous Year		Current Year	
HAIR CARE ACCES & GROOMING	9.8%		13.3%	
TOOTHPASTE	9.8%		11.3%	
HAIR SHAMPOO/CONDITIONER	9.1%		10.2%	
VITAMINS	9.3%		8.5%	
HOME HLTH. CARE/SICKRM. SUPPL.	6.3%		8.0%	
HAIR STYLING	5.9%		7.6%	
DENTAL PRODUCTS	8.3%		7.6%	
BABY PRODUCTS	10.0%		7.3%	
ORAL HYGIENE	6.6%		7.2%	
DEODORANTS	7.1%		6.9%	
FIRST AID	6.2%		6.7%	
BATH PRODUCTS	5.9%		5.7%	
COUGH & COLD-INTERNAL	4.8%		5.6%	
DIET	6.3%		5.5%	
ANTACIDS	5.0%		5.4%	
COSMETICS-MAKE UP	3.7%		5.4%	
SUN CARE	7.7%		5.3%	
FAMILY PLANNING	8.1%		5.3%	
COUGH & COLD-EXTERNAL	5.0%		5.0%	
SHAVING PRODUCTS	6.8%		4.9%	
ANALGESIC-INTERNAL	6.5%		4.8%	
LAXATIVES/DIARRHEALS/EMETICS	5.5%		4.6%	
DIABETIC PRODUCTS	3.9%		4.1%	
FEMININE HYGIENE	5.3%		4.1%	























# COMPETITIVE PROMOTION REPORT

## AVERAGE DISCOUNT PER DEAL

Total HBC Deals for current year: 36,026

- By Category -

12 Mos. Ending  
March 31,2003

Category	Previous Year	Current Year
EYE/EAR PRODUCTS	5.6% 	4.1% 
SKIN CARE	4.5% 	3.8% 
TOPICAL PREPARATIONS	4.1% 	3.7% 
ANALGESIC-EXTERNAL	4.6% 	3.5% 
DENTURE PRODUCTS	3.8% 	3.4% 
FOOT PREPARATIONS	3.7% 	3.3% 
ACNE	3.7% 	2.4% 
HOME REMEDIES	3.5% 	1.9% 
HAIR COLORING	2.3% 	1.8% 
HAIR CARE-MEN'S	2.1% 	1.4% 
TOILETRIES/MEN-WOMEN	0.7% 	0.4% 
<b>Total HBC Deals: 103,424</b>		

# COMPETITIVE PROMOTION REPORT

## AVERAGE DISCOUNT PER DEAL

12 Mos. Ending  
March 31, 2003

Total HBC Deals for current year: 199

- By Category & Manufacturer -

Category - ANALGESIC-EXTERNAL

Manufacturer

Previous Year

Current Year

Manufacturer	Previous Year	Current Year
NFI DIETARY	0.0%	23.1%
PLAYTEX	0.0%	22.3%
PRIVATE LABEL	11.3%	15.8%
PROCTER & GAMBLE - HEALTH CARE	11.4%	9.6%
SMARTSCIENCE	11.2%	9.6%
NATURE'S BOUNTY	0.0%	6.2%
MENTHOLATUM	5.9%	3.5%
PFIZER CONSUMER	3.5%	3.3%
BIOGLAN PHARM	3.0%	3.0%
W F YOUNG	3.7%	2.8%
PRINCE OF PEACE	3.0%	2.0%
DEL PHARMACEUTICALS	7.3%	0.8%
CHATTEM	5.8%	0.2%
BRISTOL-MYERS	8.0%	0.0%
NOVARTIS	0.0%	0.0%
MEDTECH	0.0%	0.0%
OAKHURST COMAPNY	7.3%	0.0%
ZILA	0.0%	0.0%
BOIRON INC.	0.0%	0.0%
FINEST HEALTH PRODUCTS	4.5%	0.0%
US DERMATOLOGICS	5.0%	0.0%
NATUROPATHIC LABS	1.0%	0.0%
HISAMITSU AMERICA	0.0%	0.0%
PONT FLORES	0.0%	0.0%

AvgDiscRptcm



# COMPETITIVE PROMOTION REPORT

## AVERAGE DISCOUNT PER DEAL

12 Mos. Ending  
March 31,2003

Total HBC Deals for current year: 199

- By Category & Manufacturer -

Category - ANALGESIC-EXTERNAL  
Manufacturer

Previous Year

Current Year

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Total HBC Deals: 459

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# COMPETITIVE PROMOTION REPORT

## P.M. REPORT

By Category

12 Mos. Ending  
March 31,2003

Total HBC Deals for current year **36026**

Category	Incidence of P.M. Money		Average Value of P.M. Money	
	Previous Year %	Current Year %	Previous Year %	Current Year %
DIABETIC PRODUCTS	39.8%	10.4%	1.9%	1.0%
ANALGESIC-EXTERNAL	21.2%	7.3%	1.0%	1.0%
TOPICAL PREPARATIONS	15.8%	5.8%	1.2%	1.0%
FOOT PREPARATIONS	7.1%	2.2%	2.2%	1.0%
DENTURE PRODUCTS	6.5%	1.6%	1.2%	1.0%
VITAMINS	3.0%	1.3%	1.5%	1.2%
ACNE	3.0%	1.2%	1.0%	2.6%
ANALGESIC-INTERNAL	4.3%	1.1%	1.4%	1.0%
ORAL HYGIENE	3.1%	1.1%	1.2%	1.0%
COSMETICS-MAKE UP	2.0%	0.8%	1.0%	1.0%
HOME REMEDIES	1.7%	0.5%	1.4%	1.0%
HAIR COLORING	2.7%	0.4%	5.0%	4.0%
COUGH & COLD-INTERNAL	2.2%	0.4%	1.1%	1.0%
SKIN CARE	2.3%	0.3%	1.8%	1.0%
EYE/EAR PRODUCTS	10.1%	0.3%	1.8%	0.9%
DIET	3.3%	0.3%	1.5%	1.0%
HOME HLTH. CARE/SICKRM. SUPPL.	3.3%	0.3%	1.6%	1.0%
DENTAL PRODUCTS	4.6%	0.2%	3.9%	1.0%
TOOTHPASTE	2.3%	0.2%	1.9%	1.0%
SUN CARE	1.2%	0.2%	1.0%	3.0%
COUGH & COLD-EXTERNAL	1.2%	0.1%	2.7%	3.0%
ANTACIDS	0.9%	0.0%	4.0%	0.0%

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# COMPETITIVE PROMOTION REPORT

## P.M. REPORT

By Category

Total HBC Deals for current year **36026**

12 Mos. Ending  
March 31,2003

Category	Incidence of P.M. Money		Average Value of P.M. Money	
	Previous Year %	Current Year %	Previous Year %	Current Year %
LAXATIVES/DIARRHEALS/EMETICS	1.0%	0.0%	1.0%	0.0%
DEODORANTS	1.5%	0.0%	2.3%	0.0%
BATH PRODUCTS	0.1%	0.0%	1.0%	0.0%
FAMILY PLANNING	9.3%	0.0%	1.9%	0.0%
FEMININE HYGIENE	3.3%	0.0%	2.0%	0.0%
TOILETRIES/MEN-WOMEN	0.0%	0.0%	0.0%	0.0%
HAIR SHAMPOO/CONDITIONER	0.2%	0.0%	3.0%	0.0%
HAIR CARE ACCES & GROOMING	0.0%	0.0%	0.0%	0.0%
HAIR CARE-MEN'S	0.0%	0.0%	0.0%	0.0%
HAIR STYLING	0.5%	0.0%	1.0%	0.0%
FIRST AID	4.1%	0.0%	1.8%	0.0%
SHAVING PRODUCTS	0.0%	0.0%	0.0%	0.0%
BABY PRODUCTS	0.7%	0.0%	1.4%	0.0%
<b>Average Totals</b>	<b>4.6%</b>	<b>1.0%</b>	<b>1.6%</b>	<b>0.8%</b>

# COMPETITIVE PROMOTION REPORT

## P.M. REPORT

By Category & Manufacturer

12 Mos. Ending

March 31, 2003

Total HBC Deals for current year 199

ANALGESIC-EXTERNAL Manufacturer	Incidence of P.M. Money		Average Value of P.M. Money	
	Previous Year %	Current Year %	Previous Year %	Current Year %
MEDTECH	100.0%	100.0%	1.0%	1.0%
BIOGLAN PHARM	66.7%	50.0%	1.0%	1.0%
W F YOUNG	39.1%	26.1%	1.0%	1.0%
BRISTOL-MYERS	0.0%	0.0%	0.0%	0.0%
CHATTEM	0.0%	0.0%	0.0%	0.0%
NOVARTIS	0.0%	0.0%	0.0%	0.0%
DEL PHARMACEUTICALS	0.0%	0.0%	0.0%	0.0%
MENTHOLATUM	0.0%	0.0%	0.0%	0.0%
NATURE'S BOUNTY	0.0%	0.0%	0.0%	0.0%
OAKHURST COMAPNY	0.0%	0.0%	0.0%	0.0%
PFIZER CONSUMER	0.0%	0.0%	0.0%	0.0%
PLAYTEX	0.0%	0.0%	0.0%	0.0%
PROCTER & GAMBLE - HEALTH CARE	0.0%	0.0%	0.0%	0.0%
ZILA	100.0%	0.0%	1.0%	0.0%
PRINCE OF PEACE	50.0%	0.0%	1.0%	0.0%
PRIVATE LABEL	0.0%	0.0%	0.0%	0.0%
BOIRON INC.	0.0%	0.0%	0.0%	0.0%
FINEST HEALTH PRODUCTS	0.0%	0.0%	0.0%	0.0%
US DERMATOLOGICS	0.0%	0.0%	0.0%	0.0%
SMARTSCIENCE	0.0%	0.0%	0.0%	0.0%
NATUROPATHIC LABS	0.0%	0.0%	0.0%	0.0%
HISAMITSU AMERICA	0.0%	0.0%	0.0%	0.0%
PONT FLORES	0.0%	0.0%	0.0%	0.0%
NFI DIETARY	0.0%	0.0%	0.0%	0.0%
<b>Category Average Totals</b>	<b>14.8%</b>	<b>7.3%</b>	<b>0.2%</b>	<b>0.1%</b>

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# COMPETITIVE PROMOTION REPORT

## P.M. REPORT

By Category & Manufacturer

Total HBC Deals for current year 199

12 Mos. Ending  
March 31, 2003

Manufacturer	<u>Incidence of P.M. Money</u>		<u>Average Value of P.M. Money</u>	
	Previous Year %	Current Year %	Previous Year %	Current Year %
<b>Report Average Totals</b>	14.8%	7.3%	0.2%	0.1%

# COMPETITIVE PROMOTION REPORT TOP 10 DEALS

12 Mos. Ending  
March 31, 2003

## ANALGESIC-EXTERNAL

UPC Product Name Manufacturer	Size	Case & Inner Pack	Timina		Mfa. List Price (Each)	Provider Promo Price (Each)	Num Buys	OFF INVOICE ALLOWANCES				BILL BACK ALLOWANCES			Net Invoice	Net w/ Allow	PM	% Discou
			Start	End				Purchase	Display	Advert	Special	Display	Advert	Special				
0-74300-00535-5 BENGAY ULTRA-STRENGTH PFIZER CONSUMER	2 OZ	36	Buv: 04/26/2002	05/10/2002		\$3.75					\$0.90 24.00%				\$2.85	\$2.85		0.249
			Shio: 04/26/2002	05/10/2002														
			Perf: 04/27/2002	05/10/2002														
			Terms: 2%30 NET 31															
			Extra Dating: N															
0-15400-04969-6 P/L ANALGESIC RUB CREME PRIVATE LABEL	.05 OZ		Buv: 05/10/2002	05/24/2002		\$1.91					\$0.40 20.94%				\$1.51	\$1.51		0.219
			Shio: 05/10/2002	05/24/2002														
			Perf: 05/11/2002	05/24/2002														
			Terms: NET 31															
			Extra Dating: N															
0-36800-16231-0 P/L PAIN RELIEF CAPLETS PM PRIVATE LABEL	50 CT	144	Buv: 05/21/2002	12/31/2003		\$1.43		\$0.29 20.28%							\$1.14	\$1.14		0.209
			Shio: 05/21/2002	12/31/2003														
			Perf: 05/21/2002	12/31/2003														
			Terms: 2% 14 NET 15															
			Extra Dating: N															
			CONTRACT PRICED.															
0-36800-14758-4 P/L PAIN RELIEF EXTRA STRENGTH PRIVATE LABEL	100 CT	144	Buv: 05/21/2002	12/31/2003		\$1.94		\$0.39 20.10%							\$1.55	\$1.55		0.209
			Shio: 05/21/2002	12/31/2003														
			Perf: 05/21/2002	12/31/2003														
			Terms: 2%14 NET 15															
			Extra Dating: N															
			CONTRACT PRICED.															
0-36800-62378-1 P/L PAIN RELIEF PMS GEL CAP PRIVATE LABEL	50 CT	144	Buv: 05/21/2002	12/31/2003		\$2.10		\$0.42 20.00%							\$1.68	\$1.68		0.209
			Shio: 05/21/2002	12/31/2003														
			Perf: 05/21/2002	12/31/2003														
			Terms: 2% 14 NET 15															
			Extra Dating: N															
			CONTRACT PRICED.															
0-36800-61682-0 P/L PAIN RELIEF GEL MAX/STR PRIVATE LABEL	.3 OZ	12	Buv: 05/21/2002	12/31/2003		\$2.46		\$0.41 16.67%							\$2.05	\$2.05		0.179
			Shio: 05/21/2002	12/31/2003														
			Perf: 05/21/2002	12/31/2003														
			Terms: 2%14 NET 15															
			Extra Dating: N															
			CONTRACT PRICED.															
0-15400-05319-8 P/L PAIN RELIEF EXTRA STRENGTH RUB PRIVATE LABEL	4 OZ		Buv: 10/18/2002	11/01/2002		\$1.93					\$0.30 15.53%				\$1.63	\$1.63		0.169
			Shio: 10/18/2002	11/01/2002														
			Perf: 10/19/2002	11/01/2002														
			Terms: NET 31															
			Extra Dating: N															

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# COMPETITIVE PROMOTION REPORT TOP 10 DEALS

12 Mos. Ending  
March 31, 2003

## ANALGESIC-EXTERNAL

UPC Product Name Manufacturer	Size	Case & Inner Pack	Timing		Mfa. List Price (Each)	Provider Promo Price (Each)	Num Buys	OFF INVOICE ALLOWANCES				BILL BACK ALLOWANCES			Net Invoice	Net w/ Allow	PM	% Discou
			Start	End				Purchase	Display	Advert	Special	Display	Advert	Special				
0-15400-05319-8 P/L PAIN RELIEF EXTRA STRENGTH RUB PRIVATE LABEL	4 OZ		<b>Buv:</b> 01/31/2003	02/14/2003		\$2.00					\$0.30 15.00%				\$1.70	\$1.70		0.159
			<b>Shio:</b> 01/31/2003	02/14/2003														
			<b>Perf:</b> 02/01/2003	02/14/2003														
			Terms: NET 31															
			Extra Dating: N															
0-37000-34564-0 THERMACARE MENSTR PROCTER & GAMBLE - HEALTH CARE	3 CT	24	<b>Buv:</b> 02/28/2003	03/14/2003		\$5.25					\$0.64 12.19%				\$4.61	\$4.61		0.129
			<b>Shio:</b> 02/28/2003	03/14/2003														
			<b>Perf:</b> 03/01/2003	03/14/2003														
			Terms: 2%17 NET 18															
			Extra Dating: N															
0-37000-34565-7 THERMACARE NECK TO ARM PROCTER & GAMBLE - HEALTH CARE	3 CT	24	<b>Buv:</b> 02/28/2003	03/14/2003		\$5.25					\$0.64 12.19%				\$4.61	\$4.61		0.129
			<b>Shio:</b> 02/28/2003	03/14/2003														
			<b>Perf:</b> 03/01/2003	03/14/2003														
			Terms: 2%17 NET 18															
			Extra Dating: N															