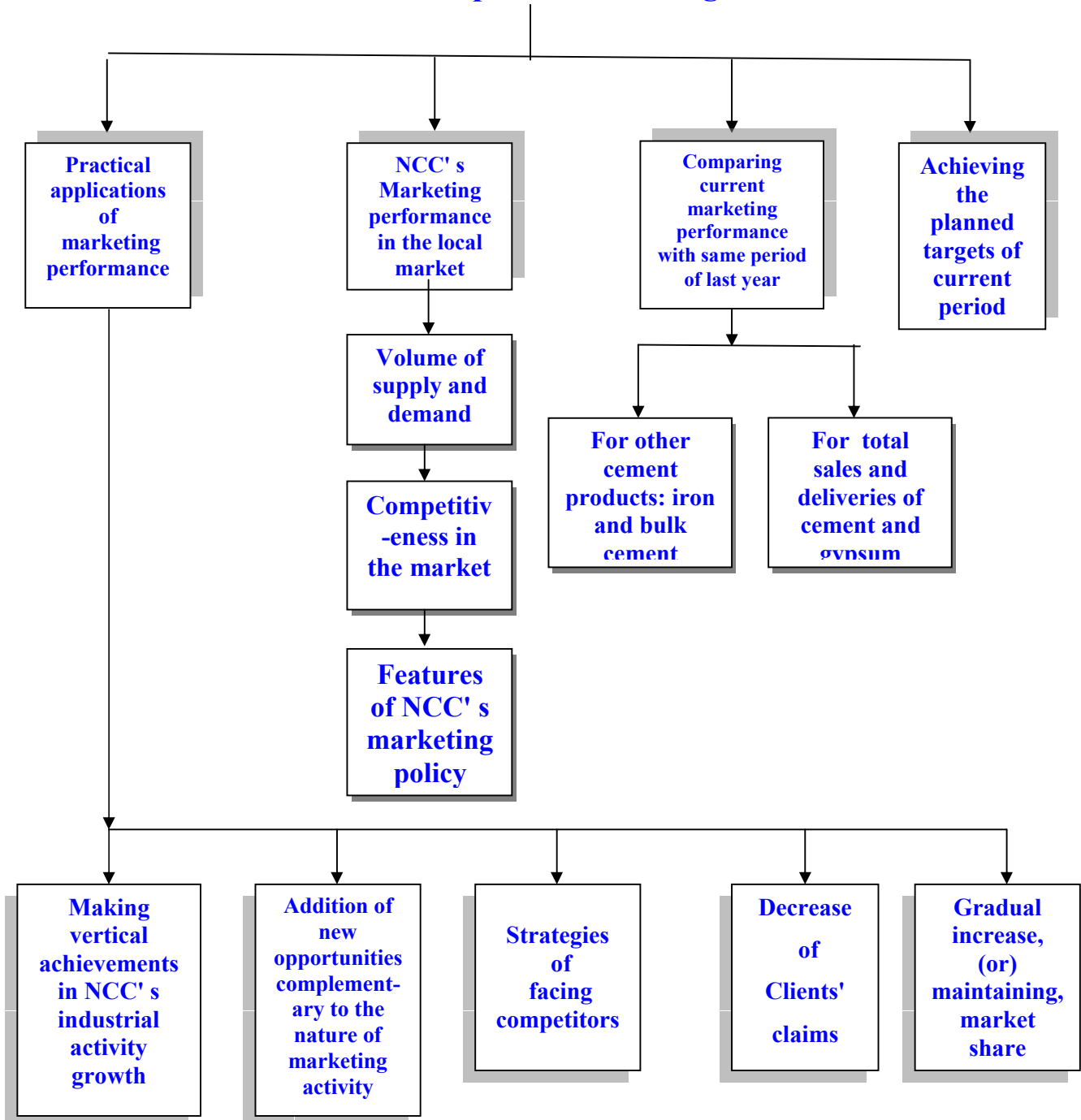


Current & Future Marketing Strategies and Policies

!!! NCC' s Scientific Principles of Marketing Performance

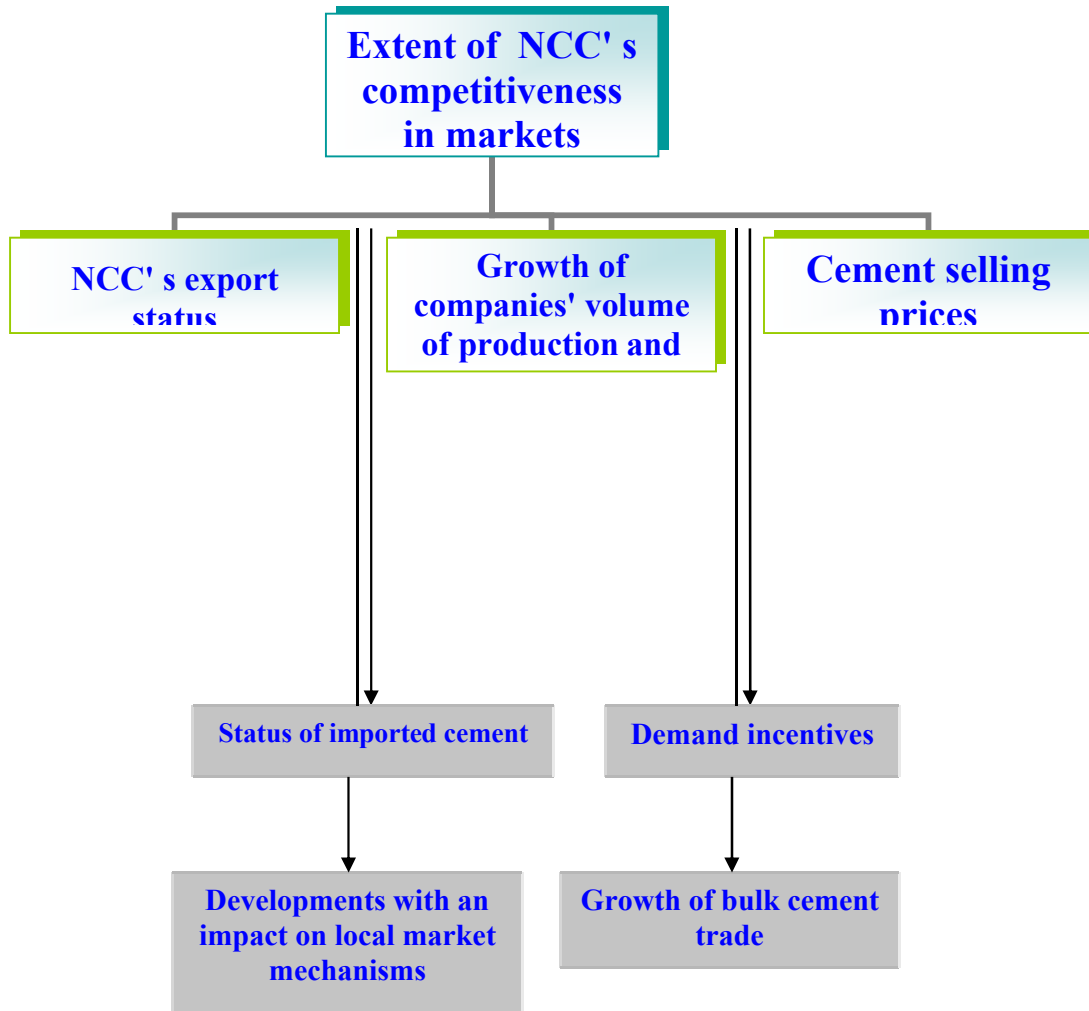
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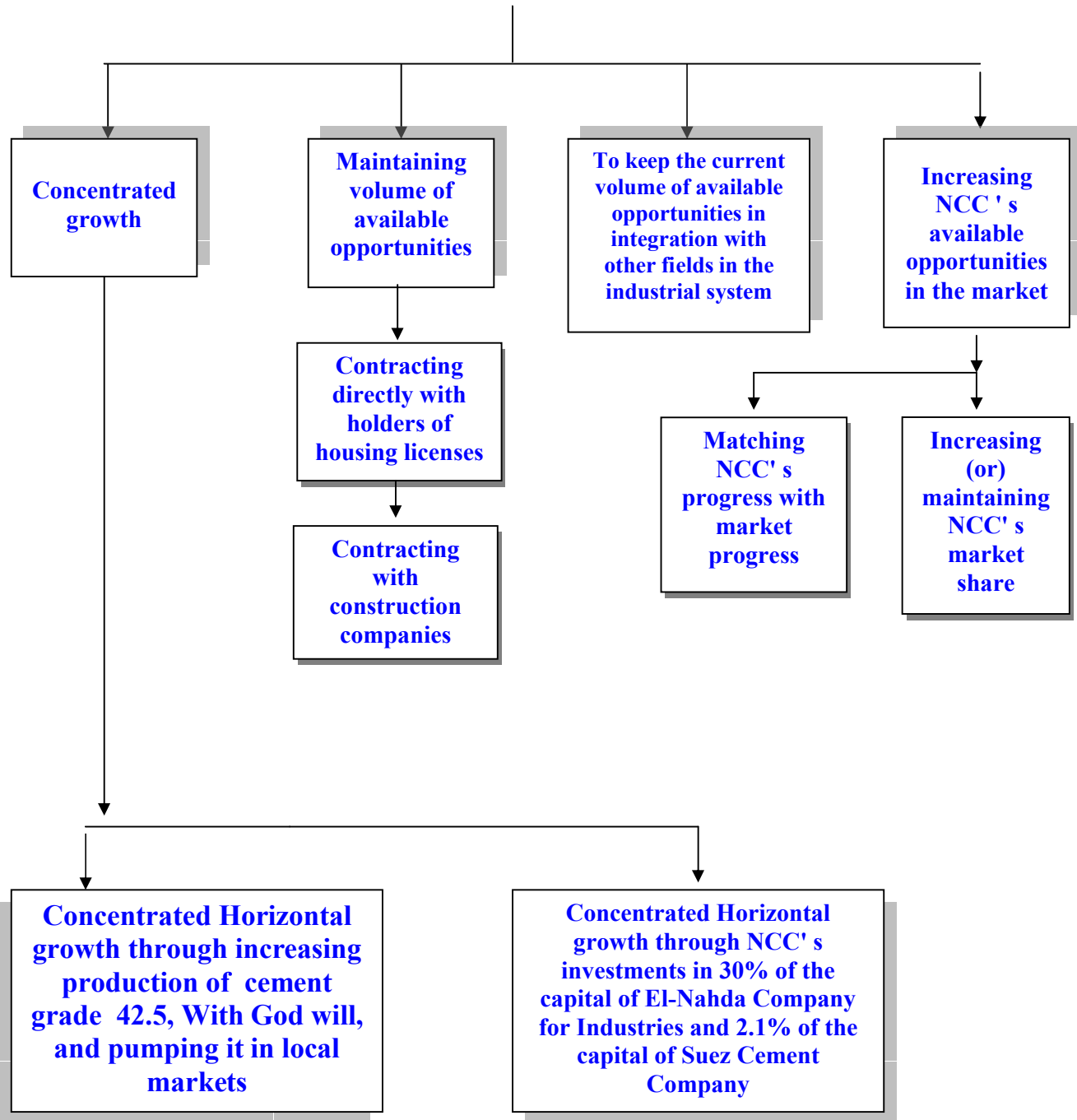
The scientific principles for evaluation of NCC' s abovementioned marketing performance are part of the general rules for assessing the whole market. It means evaluating the dynamic relations governing the market mechanisms such as:

- Marketing responsibilities in cement companies!
- Policies' and strategies' times.
- Protecting competitive position.
- Marketing productivity.
- Goods circulation rate.
- Calculating marketing cost and other costs.

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!!! Strategies of NCC' s marketing growth



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**Analyzing competitiveness between NCC and
other Egyptian cement companies in the fiscal year 2009-2010
in comparison with the fiscal year 2008-2009
in accordance with the scientific guidelines
of marketing competition
(The Boston Consulting Group's (Growth – Share Matrix)**

!!!!!! !!OE STARS ★★★				QUESTION MARKS ! ????
clinker		Cement	scientific research	
!Local deliveries	Production	!Production		
+ 11.4 % Big ratio in Delivering 104215 ton compared to zero tons in the previous period	+ 5.15 % + 4.05 % !	!! 9.03 % + 2.10 %	* High market growth !*high co.' s growth in the market	* High growth of the market + 10.90% * low growth of NCC in the market +1.20%
✓ Cement production and production and local deliveries Of clinker				✓ cement local Deliveries !!
✓✓Excellent	✓✓Excellent	!✓Good	Assessing NCC' s competitiveness	
!!!! f!!!!OE!! f !!!!!!!OEde! (!!CASH COW				!!!!DOGS 🐶🐶🐶
<ul style="list-style-type: none"> • Market low development • Co. high development in the market! 				<ul style="list-style-type: none"> • Market low development • Co. low development in the market
!!!				!!!

*** Importance of calculating NCC's growth rate compared to the market growth rate from marketing point of view:**

! The Egyptian cement market is rapidly growing in terms of quantity and value i.e. opportunities to increase the volume of sales take place at rapid rates and this makes NCC' s products absorb a large share of the cash market so as to cover the expenses of marketing, advertising and any other additional marketing investments.!

!*✓ Growth performance rate! = The difference between the performance volume in current period compared to the same period of previous fiscal year.

!* Market share = The volume of NCC' s performance in tons ÷ market size in tons

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- * **Market share growth rate** = Measuring the development in NCC' s market share each year.
- * **Rate of Dynamic acceleration** = To keep the rate of NCC' s performance growth or growth of the market shares faster than market growth..

**NCC' s marketing performance in the fiscal Year
2009/2010 compared to fiscal year 2008/2009**

!Amount – tons	!market share %!
Clinker Production = an increase of +118838 ton	Slight increase by +0.08%
Local deliveries of clinker = an increase of +104215 ton	!Big increase in percentage
Cement production = An increase of +63,453 tons	Slight decrease of (-) 0.44% due to an increase in market capacity
Local deliveries = an increase of + 36363 tons	Slight decrease of (-) 0.61 % due to an increase in market capacity

!
!

Marketing Research

The increase of NCC' s volume of marketing performance in terms of cement production and local deliveries compared to previous period was not accompanied by an increase in NCC' s market actual percentage share. Reasons behind decrease of NCC' s market share may be expressed in terms of the increase in NCC' s current competitors' production and deliveries in quantities more than what had been achieved by NCC, in addition to the production of New cement companies; El-Arabia, South Valley, New Sinai, Shura and Aswan cos., leading to a big increase in market capacity resulted in change in cos.' market share.