
Global Market Share Planner

6th edition

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Introduction

This is the sixth edition of Euromonitor International's Global Market Share Planner. This comprehensive database of company and market share data is available in hard copy and electronic formats and is published biennially.

The series concentrates on the key fast-moving consumer goods (FMCG) markets in 54 countries. A substantial research programme has been carried out to research market shares in these markets along with detailed company profiles for the key brand-owning companies. Company profiles provide comparative data for all the key brand-owning companies involved in those sectors covered worldwide. In addition the top multinational companies are analysed in detail by our experienced company research team.

Research methods have included examining all key financial data from annual reports and other company publications, store checks, company web sites, the financial press, and direct contact with the companies themselves. This research has been carried out in all countries using locally-based and London-based experts.

This directory comprises three sections:

Section One: Market Share Tracker

For the world, each region and country, this section provides essential market share data for the top companies in each market for years 2007, 2008 and 2009, thus identifying over 4,500 leading companies worldwide, as well as the leading regional and world players that dominate these fast moving consumer goods markets.

For each of the markets listed below, a ranking of the key brand-owning companies is given based on the company's market share, together with the size of the company's market share either in terms of its retail value or volume in the case of beer, spirits, wine and soft drinks. Value data are presented in local currencies.

The rankings are presented for each market as a world ranking a regional ranking and a country by country ranking. The sales data is based on the total retail selling price of all brands of significant market share, in all sectors covered by Euromonitor International research. Three years of data 2007, 2008 and 2009 are listed for the sake of comparison. In each national market segment the top companies according to market share are listed. The world and regional rankings contain up to 25 companies depending on the sector.

Regions covered are North America, Latin America, Western Europe, Eastern Europe, Africa and the Middle East, and Asia-Pacific.

Country Coverage

The following countries are covered:

Americas

Argentina, Brazil, Canada, Chile, Colombia, Mexico, the USA, and Venezuela

Asia-Pacific

Australia, China, Hong Kong, India, Indonesia, Japan, Korea (South), Malaysia, New Zealand, Philippines, Singapore, Thailand, Taiwan, Vietnam

Eastern Europe, Africa and the Middle East

Bulgaria, Czech Republic, Hungary, Lithuania, Poland, Romania, Russia, Slovakia, Ukraine, and Egypt, Israel, Morocco, Saudi Arabia, and South Africa

Western Europe

Austria, Belgium, Denmark, Finland, France, Germany, Greece, Italy, Ireland, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, Turkey, and the United Kingdom

Market Coverage

Markets covered include the following:

Drinks

Beer, spirits, wine, carbonated soft drinks, fruit/vegetable juice, bottledwater, functional drinks, concentrates, hot drinks, coffee, tea, and other hot drinks (e.g herbal-based drinks, cocoa, and other powder-based beverages)

Foods

Confectionery, bakery products, ice cream, dairy products, sweet and savoury snacks, snack bars, meal replacement products, ready meals, soup, pasta, noodles, canned food, frozen food, dried food, chilled food, oils and fats, sauces, dressings and condiments, baby food, spreads and pet food

Beauty and Personal Care

Baby care, bath and shower products, deodorants, hair care, colour cosmetics, men's shaving products, oral hygiene, perfumes/fragrances, skin care, and sun care

Home Care

Textile washing products, dishwashing products, surface cleaners, chlorine bleach, toilet care products, polishes, air fresheners, and insecticides

Consumer Health

Analgesics, cough and cold remedies, digestive remedies, medicated skincare, vitamins and dietary supplements, and other healthcare products

Retail Tissue and Hygiene

Personal products (diapers, feminine sanpro products), tissue products, and household products

Section Two: World's Leading Global Brand Owners

In-depth profiles of the top global brand owners worldwide operating in these markets. For each of the global companies, there are detailed corporate and financial analyses, information on global market share presence and significant subsidiaries. Main brands, product range and full operational data are also included.

Section Three: Major Market Share Companies

Identifies the leading companies in the Americas, Western Europe, Asia-Pacific, and Eastern Europe, Africa, and the Middle East. Each profile covers all the main contact details as well as a financial profile (where available), main products and brands, and market share performance.

Section Four: Indexes

A-Z company index by market sector

A-Z company index by country

Australasia, Beauty and Personal Care company market share and size 2007-2009, ranked by 2009

Table 1.3

% Retail Value RSP/As stated

Company name	% share 2007	% share 2008	% share 2009	US\$ million 2007	US\$ million 2008	US\$ million 2009
1 Procter & Gamble Co, The (USA)	13.68	13.64	13.90	728.11	746.25	702.73
2 L'Oréal Groupe (France)	11.34	12.12	12.22	603.61	663.25	617.97
3 Unilever Group (United Kingdom)	7.58	7.65	7.64	403.32	418.43	386.03
4 Colgate-Palmolive Co (USA)	6.78	6.87	6.99	360.85	375.94	353.35
5 Estée Lauder Cos Inc (USA)	5.55	5.66	5.66	295.34	309.50	286.12
6 Johnson & Johnson Inc (USA)	4.29	4.42	4.52	228.17	242.13	228.53
7 Revlon Inc (USA)	3.29	3.32	3.29	175.20	181.80	166.47
8 Beiersdorf AG (Germany)	2.91	2.97	3.02	155.02	162.80	152.89
9 Avon Products Inc (USA)	2.89	2.73	2.60	153.51	149.27	131.52
10 Henkel AG & Co KGaA (Germany)	2.19	2.17	2.03	116.62	118.56	102.84
11 Coty Inc (USA)	1.64	1.59	1.63	87.07	87.28	82.58
12 Clarins SA (France)	1.54	1.58	1.58	82.16	86.20	80.08
13 Energizer Holdings Inc (USA)	1.58	1.54	1.57	84.24	84.52	79.20
14 Elizabeth Arden Inc (USA)	1.64	1.47	1.51	87.19	80.28	76.54
15 Tupperware Brands Corp (USA)	1.58	1.60	1.51	84.19	87.38	76.32
16 GlaxoSmithKline Plc (United Kingdom)	1.46	1.44	1.43	77.55	78.75	72.07
17 Alberto-Culver Co (USA)	1.33	1.32	1.27	70.84	72.09	63.99
18 Reckitt Benckiser Plc (United Kingdom)	1.35	1.35	1.24	71.65	73.65	62.78
19 Pharmcare Laboratories Pty Ltd (Australia)	1.01	1.04	1.08	53.87	57.14	54.56
20 Jurlique International Pty Ltd (Australia)	0.92	1.02	1.01	48.89	56.03	51.18
21 Shiseido Co Ltd (Japan)	1.01	1.04	1.01	53.77	56.64	51.16
22 LVMH Moët Hennessy Louis Vuitton (France)	0.99	0.97	0.95	52.51	53.05	47.84
23 Creative Brands Pty Ltd (Australia)	0.71	0.71	0.70	37.86	39.05	35.19
24 Valeant Pharmaceuticals International (USA)	-	0.05	0.69	-	2.75	34.96
25 Mary Kay Inc (USA)	0.78	0.73	0.68	41.69	39.94	34.15
Company total	78.04	79.00	79.73	4,153.23	4,322.68	4,031.05
Top 5 companies' market share	44.93	45.94	46.41	2,391.23	2,513.37	2,346.20
Private Label	0.92	0.89	0.88	49.03	48.90	44.73
Other	21.04	20.11	19.39	1,118.57	1,100.67	979.28
TOTAL	100.00	100.00	100.00	5,320.83	5,472.25	5,055.07

Eastern Europe, Beauty and Personal Care company market share and size 2007-2009, ranked by 2009

Table 1.4

% Retail Value RSP/As stated

Company name	% share 2007	% share 2008	% share 2009	US\$ million 2007	US\$ million 2008	US\$ million 2009
1 Procter & Gamble Co, The (USA)	13.10	12.74	12.58	3,155.56	3,590.62	2,885.38
2 L'Oréal Groupe (France)	7.51	7.99	7.97	1,808.70	2,253.90	1,828.27
3 Avon Products Inc (USA)	8.11	7.76	7.96	1,953.24	2,187.41	1,824.73
4 Oriflame Cosmetics SA (Sweden)	5.55	6.18	6.48	1,335.83	1,742.41	1,487.26
5 Beiersdorf AG (Germany)	4.85	4.91	5.21	1,168.90	1,384.59	1,194.94
6 Henkel AG & Co KGaA (Germany)	4.06	3.99	4.04	976.78	1,123.98	926.57
7 Unilever Group (United Kingdom)	3.86	3.82	3.82	930.70	1,078.35	876.41
8 Colgate-Palmolive Co (USA)	3.54	3.47	3.41	852.65	979.14	781.93
9 Coty Inc (USA)	2.27	2.24	2.28	547.60	630.24	522.45
10 Kalina Concern OAO (Russia)	1.90	1.85	1.95	456.49	521.13	447.86
11 Amway Corp (USA)	1.38	1.59	1.39	331.85	447.11	318.71
12 Estée Lauder Cos Inc (USA)	1.21	1.26	1.19	292.54	355.36	272.67
13 Johnson & Johnson Inc (USA)	1.13	1.11	1.10	271.71	312.91	253.43
14 LVMH Moët Hennessy Louis Vuitton (France)	1.10	1.05	1.01	264.77	295.70	231.86
15 GlaxoSmithKline Plc (United Kingdom)	0.87	0.88	0.97	208.91	249.45	221.45
16 Mary Kay Inc (USA)	1.21	1.07	0.93	291.15	302.57	212.73
17 Chanel SA (France)	0.77	0.74	0.69	186.10	207.68	159.02
18 Faberlic OAO (Russia)	0.83	0.75	0.67	199.56	212.61	152.79
19 Yves Rocher SA (France)	0.68	0.66	0.63	162.98	185.83	144.65
20 Nevskaya Kosmetika ZAO (Russia)	0.57	0.58	0.61	137.16	163.76	139.45
21 Energizer Holdings Inc (USA)	0.35	0.35	0.35	85.22	99.41	80.08
22 Vesna PKK OAO (Russia)	0.34	0.32	0.35	82.69	89.29	80.06
23 Evyap Sabun Yag Gliserin Sanayii ve Ticaret AS (Turkey)	0.37	0.35	0.34	89.37	99.95	77.83
24 Dr Theiss Naturwaren GmbH (Germany)	0.38	0.35	0.32	92.62	97.31	73.86
25 Svoboda OAO (Russia)	0.37	0.33	0.31	89.75	94.24	70.92
Company total	66.31	66.34	66.56	15,972.83	18,704.95	15,265.31
Top 5 companies' market share	39.12	39.58	40.20	9,422.23	11,158.93	9,220.58
Private Label	0.68	0.74	0.82	164.16	207.33	188.15
Other	33.01	32.92	32.62	7,943.54	9,280.16	7,482.23
TOTAL	100.00	100.00	100.00	24,080.52	28,192.43	22,935.69

Morocco, Beer company market share and size 2007-2009, ranked by 2009

Table 1.96

% Total Volume/As stated

Company name	% share 2007	% share 2008	% share 2009	million litres 2007	million litres 2008	million litres 2009
1 Groupe des Brasseries du Maroc SA (Morocco)	93.30	93.94	94.37	111.35	118.46	121.73
2 Cobomi SA (Morocco)	1.83	1.69	1.57	2.19	2.14	2.03
3 Foods & Goods SA (Morocco)	0.65	0.65	0.63	0.77	0.82	0.81
4 Bourchanin & Cie SA (Morocco)	0.63	0.61	0.58	0.76	0.77	0.75
5 Holsten-Brauerei AG (Germany)	0.43	0.42	0.40	0.51	0.53	0.52
6 Ebertec SA Morocco (Morocco)	0.15	0.15	0.14	0.18	0.18	0.18
7 Bavaria NV (Netherlands)	0.14	0.13	0.12	0.17	0.17	0.16
Company total	97.13	97.59	97.81	115.93	123.07	126.18
Top 5 companies' market share	96.84	97.31	97.55	115.58	122.72	125.84
Other	2.87	2.41	2.19	3.41	3.04	2.82
TOTAL	100.00	100.00	100.00	119.34	126.11	129.00

Netherlands, Beer company market share and size 2007-2009, ranked by 2009

Table 1.97

% Total Volume/As stated

Company name	% share 2007	% share 2008	% share 2009	million litres 2007	million litres 2008	million litres 2009
1 Heineken NV (Netherlands)	42.47	41.19	40.90	512.86	500.90	469.92
2 Grolsch, Koninklijke NV (Netherlands)	18.43	17.96	17.62	222.54	218.44	202.39
3 Interbrew Nederland NV (Netherlands)	13.29	13.25	14.51	160.48	161.16	166.67
4 Bavaria NV (Netherlands)	8.60	8.54	9.04	103.90	103.89	103.81
5 Palm BV (Netherlands)	1.89	1.90	2.04	22.79	23.14	23.43
6 Albert Heijn BV (Netherlands)	1.83	1.83	1.96	22.09	22.22	22.50
7 Warsteiner Brauerei Haus Cramer GmbH & Co KG (Germany)	1.30	1.30	1.22	15.69	15.79	14.02
8 Brasseries Kronenbourg SA (France)	0.61	0.63	0.70	7.37	7.63	8.05
9 Dortmunder Actie Brauerei AG (Germany)	0.50	0.55	0.56	6.01	6.68	6.45
10 Modelo SA de CV, Grupo (Mexico)	0.56	0.58	0.53	6.77	7.05	6.10
Company total	89.48	87.73	89.08	1,080.50	1,066.90	1,023.34
Top 5 companies' market share	84.68	82.84	84.11	1,022.57	1,007.53	966.22
Private Label	3.57	3.60	4.12	43.11	43.80	47.30
Other	6.95	8.67	6.80	83.93	105.26	78.19
TOTAL	100.00	100.00	100.00	1,207.54	1,215.96	1,148.83

New Zealand, Beer company market share and size 2007-2009, ranked by 2009

Table 1.98

% Total Volume/As stated

Company name	% share 2007	% share 2008	% share 2009	million litres 2007	million litres 2008	million litres 2009
1 Lion Nathan Ltd (New Zealand)	51.72	51.46	51.36	161.97	163.39	164.47
2 DB Breweries Ltd (New Zealand)	36.33	36.88	36.91	113.77	117.11	118.22
3 Independent Liquor (NZ) Ltd (New Zealand)	4.04	3.75	3.59	12.67	11.91	11.50
4 Foster's New Zealand Ltd (New Zealand)	3.22	3.12	3.00	10.09	9.90	9.62
5 Pacific Beverages (New Zealand) Ltd (New Zealand)	-	0.16	0.32	-	0.50	1.03
6 Coopers Brewery Ltd (Australia)	0.07	0.07	0.14	0.21	0.22	0.44
Company total	95.38	95.44	95.32	298.71	303.03	305.28
Top 5 companies' market share	95.31	95.37	95.18	298.50	302.81	304.84
Private Label	0.26	0.32	0.32	0.83	1.03	1.02
Other	4.36	4.24	4.36	13.66	13.48	13.96
TOTAL	100.00	100.00	100.00	313.20	317.53	320.26

Norway, Beer company market share and size 2007-2009, ranked by 2009

Table 1.99

% Total Volume/As stated

Company name	% share 2007	% share 2008	% share 2009	million litres 2007	million litres 2008	million litres 2009
1 Ringnes AS (Norway)	51.43	50.85	51.32	131.08	133.66	134.33
2 Hansa Borg Bryggerier ASA (Norway)	16.57	16.36	16.48	42.24	43.02	43.13
3 Grans Bryggeri AS (Norway)	6.73	7.25	7.75	17.14	19.06	20.29
4 Aass, P Ltz AS (Norway)	6.96	6.93	7.15	17.73	18.21	18.72
5 Macks Ølbryggeri AS (Norway)	5.03	5.02	5.05	12.83	13.21	13.21
6 Christianssands Bryggeri AS (Norway)	1.66	1.66	1.62	4.24	4.36	4.25
7 Brewery International AS (Norway)	1.50	1.49	1.51	3.83	3.92	3.94
8 Scandinavian Beverage Group AS (Norway)	1.50	1.48	1.50	3.83	3.89	3.92
9 Haugen-Gruppen AS (Norway)	0.18	0.76	0.96	0.45	2.00	2.50
10 FEMSA (Fomento Economico Mexicano SA de CV) (Mexico)	0.39	0.38	0.37	0.99	0.99	0.96
Company total	91.95	92.18	93.71	234.36	242.32	245.25
Top 5 companies' market share	86.72	86.41	87.75	221.02	227.16	229.68
Private Label	3.82	4.00	4.18	9.73	10.52	10.94
Other	4.23	3.82	2.11	10.81	10.04	5.55
TOTAL	100.00	100.00	100.00	254.90	262.87	261.74

Pernod Ricard Groupe

Address	12 Place des Etats-Unis, Paris, 75116, France
Contact details	Telephone +33 1 4100 4100
Company website(s)	www.pernod-ricard.fr
Key personnel	Patrick Ricard (<i>Chairman</i>); Pierre Pringuet (<i>Chief Executive Officer</i>); Giles Bogaert (<i>Managing Director, Finance</i>); Michel Bord (<i>Managing Director, Distribution Network</i>); Thierry Billot (<i>Managing Director, Brands</i>)

Company activity Production and distribution of drinks

Corporate summary Since fiscal 2006 (year to June) Pernod Ricard has seen growing net sales and profit. This growth has been driven by its two recent acquisitions, Allied Domecq in 2005 and V&S in 2008. V&S's acquisition further strengthened its position as the world's second biggest spirits producer with a strong presence in all categories but tequila, only 0.2 percentage points behind Diageo.

The company has seen its volumes fall by 2% in 2009, due to a combination of divestments (Wild Turkey, Tia Maria), but also from the effects of the current global economic downturn. This has particularly affected its recently acquired Absolut brand in its largest market, the US, where there has been a preference to trade down from premium brands.

The Allied Domecq deal was transformative for Pernod Ricard in terms of finances and the company's growth in the subsequent two years was due to those brands. Meanwhile, growth in fiscal 2009 came almost entirely from the V&S acquisition, as its existing brands felt the impact of the recession.

Allied Domecq and V&S in recent years has turned the company into a far more global one. In fiscal 2005, before the Allied Domecq acquisition, France accounted for 15% of net sales. In fiscal 2009, this fell to 10%. The Allied Domecq deal was the main factor in this transformation: increasing net sales from Europe (excluding France) by 49%, especially in Eastern Europe; Asia Pacific and the Rest of the World by 75% and the Americas by 127%. In fiscal 2005, operating profits from the Americas accounted for 24% of the EUR729 million global total, a large proportion of which came from Latin America. In fiscal 2009, the Americas accounted for 34% of the EUR1.8 billion global total, the vast majority of which now comes from the US.

Similarly, Pernod Ricard's 2008 acquisition of V&S slightly strengthened the sixth biggest wine company. The acquisition boosted the company's volumes, by just over 10%. So far, wine divestments have played a very small part in the company's debt reduction strategy. The only wine brand to be sold thus far is its local Brazilian brand, Almadén, to local company, Vinícola Miolo.

The company's strength comes from entry level brands such as Coolabah bag-in-box, which has provided good routes to market, to its premium range of champagne, Perrier Jouët and Mumm. The company's strength relies on its Jacob's Creek Australian brand, which accounts for 25% of its total volumes.

Established 1939

Key events	2010 — Advertising & marketing
	– (May) Pernod Ricard realigns its brand portfolio. It splits its brands into four categories: Top 14 Spirits and Champagne brands, which include all the spirits and champagne brands in the previous key 15 strategic brands plus Royal Salute; Top 4 wine brands - Jacob's Creek, Montana, Campo Viejo and Graffina; 18 local spirits brands - includes brands such as Wyborowa, Indian whiskey brands, Clan Campbell, Seagrams gin, Montilla, Something Special, 100 Pipers and Pastis 51. This is down from the previous 30; Others - all remaining brands not in the other three categories
	Divestments and demergers
	– (February 15) Pernod Ricard will sell some of their Swedish and Danish assets to Altia for a cash consideration of SEK835 million; these include a number of local wine and spirits brands including Explorer vodka, Lord Calvert whisky, 1 Enkelt bitter, Blossa glögg and Chill Out wines, and a bottling facility located in Svendborg, Denmark and 2 logistic centres located in Odense, Denmark and Årsta, Sweden.
	Legal / regulatory affairs
	– (April 8) Pernod Ricard and Russian Standard Vodka announce that they have reached a settlement of claims (claims were dismissed) brought by Russian Standard against Pernod Ricard in the United States District Court.
	Restructuring
	– (July) Pernod Ricard announces the following organisational changes: <ul style="list-style-type: none"> · the creation of a new Brand Company called Premium Wine Brands · the responsibilities of The Absolut Company are extended to include all the Group's international vodka brands · the creation of a new region covering Sub-Saharan Africa, called Pernod Ricard Sub-Saharan Africa, reporting into Pernod Ricard Europe
	2009 — Acquisitions
	– (March 27) Pernod Ricard acquires Absolut, Stolichnaya Brands
	Distribution & logistics
	– (April 9) Pernod Ricard and Kirin have agreed to terminate their distribution arrangement under which Kirin has distributed Chivas Regal and other Pernod Ricard brands in Japan since January 1, 2006. Termination will be effective as of September 30, 2009. Pernod Ricard Japan will carry out distribution of these brands from October 1, 2009.
	Divestments and demergers
	– (October) Pernod Ricard sells its Almadén local Brazilian wine brand to local Brazilian producer the Miolo Group for an undisclosed fee.
	– (July) Pernod Ricard sells its Tia Maria coffee liqueur brand to Illva Saronno for US\$178 million.
	– (April 4) Pernod Ricard sells Grönstedts Cognac to Altia and Star Gin, Red Port and Dry Anis to Arcus Gruppen AS
	– (April) Pernod Ricard sells its Wild Turkey bourbon/other US whiskey brand to the Gruppo Campari for US\$575 million.
	– (March 2) Pernod Ricard has signed an agreement to sell its cognac brand Bisquit and associated inventories to Distell Group Limited for 31 million euros; this transaction also includes a distribution agreement covering France, Belgium, Switzerland and Luxembourg.
	2008 — Acquisitions
	– (July) Pernod Ricard completes the acquisition of V&S, Vin&Sprit, including the Absolut vodka brand for US\$8.9 billion
	Distribution & logistics
	– (September) The four shareholders in the Maxxium distribution alliance agree to the early termination of the agreement for Maxxium to distribute V&S's brands as of 1 October 2008
	– (August) Pernod Ricard and Fortune Brands agree to the early termination of the distribution agreement whereby Fortune Brand's subsidiary Future Brands distributed V&S's portfolio of brands. Pernod Ricard will pay compensation of US\$230 million to Fortune Brands and V&S will no longer be a shareholder in Future Brands.

Slovakia

Avon Cosmetics sro

Address Vajnorska 100/B, Bratislava 38, 830 08
Contact details **Telephone** +421 24 911 0011 **Fax** +421 24 446 4140
email marketing@avon.sk

Company website(s) **www.avon.com**
Key personnel Ms Marianna Bradovkova (General Manager, Slovakia, Czech Republic)
Parent company Avon Products Inc (USA)
Company activity Direct selling of cosmetics and toiletries

Company market share and rank Table 3.3786

	2005 (rank)	2006 (rank)	2007 (rank)	2008 (rank)	2009 (rank)
Beauty and Personal Care (% Retail Value RSP)	12.22 (1)	10.73 (1)	9.76 (1)	9.16 (2)	9.16 (2)
Consumer Health (% Retail Value RSP)	0.81 (25)	0.80 (25)	0.77 (26)	0.73 (28)	0.71 (28)

Leading brands Table 3.3787

Sector (latest year) — Brand(s)
Beauty and Personal Care (2009) — Avon; Avon Color; Avon Kids; Color Trend; Perfect Wear
Consumer Health (2009) — Avon

Website(s) **Address (url)**
National www.avon.sk

Beiersdorf Slovakia sro

Address Riznerova 5, Bratislava, 811 01
Contact details **Telephone** +421 25 710 1611 **Fax** +421 25 244 2166
email contact.bratislava@beiersdorf.com

Company website(s) **www.beiersdorf.com**
Key personnel Ulrich Schmidt (Managing Director, Central Eastern Europe)
Parent company Beiersdorf AG (Germany)
Company activity Marketing of cosmetics, skin care and disposable paper products

Company market share and rank Table 3.3788

	2005 (rank)	2006 (rank)	2007 (rank)	2008 (rank)	2009 (rank)
Beauty and Personal Care (% Retail Value RSP)	4.41 (8)	4.95 (8)	5.40 (8)	6.12 (8)	7.80 (6)

Leading brands Table 3.3789

Sector (latest year) — Brand(s)
Beauty and Personal Care (2009) — Eucerin Hydro- Balance; Labello; Nivea Baby; Nivea Bath Care; Nivea Body; Nivea Deodorant; Nivea Deodorant for Men; Nivea for Men; Nivea Hair Care; Nivea Lip Care; Nivea Soft; Nivea Sun; Nivea Visage

Website(s) **Address (url)**
Brand www.nivea.sk
National www.beiersdorf.sk

Coca-Cola HBC Slovakia sro

Address PO Box 37, Tuhovská 1, Bratislava, 83107
Contact details **Telephone** +421 249 263 304 **Fax** +421 249 263 114
email radovan.peknik@cchbc.com

Company website(s) **www.ccamatil.com**
Key personnel Ivan Stefanets (General Manager)
Parent company Coca-Cola Hellenic Bottling Co SA (Greece)
Company activity Manufacture and marketing of bottled and canned soft drinks

Company market share and rank Table 3.3790

	2005 (rank)	2006 (rank)	2007 (rank)	2008 (rank)	2009 (rank)
Soft Drinks (% Retail Volume)	13.79 (1)	13.84 (1)	13.67 (1)	13.59 (1)	13.40 (1)

Leading brands Table 3.3791

Sector (latest year) — Brand(s)
Soft Drinks (2009) — Bonaqua; Cappy; Cherry Coke; Coca-Cola; Coca-Cola Light; Coca-Cola Zero; Dr Pepper; Fanta; Kinley; Lift; Nestea; Sprite

Colgate-Palmolive Slovensko sro

Address PO Box 29, Pribinova 23, Bratislava, 811 09
Contact details **Telephone** +421 25 708 7111
Company website(s) **www.colgate.com**
Key personnel Ms Hana Cermakova (Manager, Marketing)
Parent company Colgate-Palmolive Co (USA)
Company activity Marketing of toiletries and household cleaning products

Company market share and rank Table 3.3792

	2005 (rank)	2006 (rank)	2007 (rank)	2008 (rank)	2009 (rank)
Beauty and Personal Care (% Retail Value RSP)	2.51 (9)	2.64 (9)	2.58 (9)	2.56 (9)	2.49 (9)

Home Care (% Retail Value RSP)	0.89 (13)	0.86 (13)	0.84 (13)	0.83 (13)	0.83 (13)
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Leading brands Table 3.3793

Sector (latest year) — Brand(s)
Beauty and Personal Care (2009) — Colgate; Colgate Herbal; Colgate Total; Colgate Triple Action; Colgate Whitening; Lady Speed Stick; Palmolive; Palmolive Aromatherapy; Palmolive Fruit Essentials; Palmolive Naturals; Protex; Speed Stick
Home Care (2009) — Ajax

Coty Slovenská Republika sro

Address Ladislava Déřera 18, Bratislava, 831 01
Contact details **Telephone** +421 25 479 3888 **Fax** +421 25 479 3878
email coty@coty.sk

Key personnel Amaury de Vallois (Country Manager); Miroslav Bulin (Director, Sales)
Parent company Coty Inc (USA, ownership since: 1993)
Company activity Marketing of fragrances, colour cosmetics and skin care products

Company market share and rank Table 3.3794

	2005 (rank)	2006 (rank)	2007 (rank)	2008 (rank)	2009 (rank)
Beauty and Personal Care (% Retail Value RSP)	9.07 (2)	9.79 (2)	9.34 (2)	9.59 (1)	9.49 (1)

Leading brands Table 3.3795

Sector (latest year) — Brand(s)
Beauty and Personal Care (2009) — 'lex'cl.a.ma'tion; adidas; adidas Series; adidas sport; adidas Team Force; adidas woman sport; Astor; Calvin Klein Eternity Moment; Cerruti 1881 pour Femme; Chanson d'Eau; Cobalt; Crossmen; David Beckham Instinct; David Beckham Intimately; Esprit Connect; Esprit Life; Isa Bella; Jovan for Her; Margaret Astor; Miss Sporty; My Manifesto; Prêt-à-Porter; Puzzle; Rimmel; Rimmel London Volume Flash Black Gift Set; Route 66; The Healing Garden; Vanilla Musk

Website(s) **Address (url)**
Brand www.coty.com; www.rimmel.sk
National www.coty.sk

GlaxoSmithKline Slovakia sro

Address Galvaniho 7/A, Bratislava, 821 04
Contact details **Telephone** +421 2 4826 1111 **Fax** +421 2 4826 1110
email recepcia.sk@gsk.com

Company website(s) **www.gsk.com**
Key personnel Monika Hornikova (Managing Director)
Parent company GlaxoSmithKline Plc (United Kingdom)
Company activity Distribution of OTC products

Company market share and rank Table 3.3796

	2005 (rank)	2006 (rank)	2007 (rank)	2008 (rank)	2009 (rank)
Beauty and Personal Care (% Retail Value RSP)	1.37 (15)	1.37 (14)	1.39 (14)	1.39 (12)	1.52 (12)
Retail Tissue and Hygiene (% Retail Value RSP)	0.11 (26)	0.11 (25)	0.11 (24)	0.11 (24)	0.11 (24)

Leading brands Table 3.3797

Sector (latest year) — Brand(s)
Beauty and Personal Care (2009) — Aquafresh; Lactacyd Femina; Odol
Retail Tissue and Hygiene (2009) — Lactacyd

Website(s) **Address (url)**
National www.gsk.sk

Hamé Slovakia sro

Address Hviezdoslavova 1, Stupava, 900 31
Contact details **Telephone** +421 26 593 6637 **Fax** +421 26 593 6604
email office@hame.sk

Company website(s) **www.hame.cz**
Parent company Hamé as (Czech Republic)
Company activity Manufacturer of canned fruits, vegetables, preserves, food specialties and ready made meals

Company market share and rank Table 3.3798

	2005 (rank)	2006 (rank)	2007 (rank)	2008 (rank)	2009 (rank)
Packaged Food (% Retail Value RSP)	2.09 (7)	2.08 (7)	2.10 (7)	2.22 (7)	2.29 (7)

Leading brands Table 3.3799

Sector (latest year) — Brand(s)
Packaged Food (2009) — Hamé; Otma

Website(s) **Address (url)**
Other Corporate www.cee-foodindustry.com