

Amway Corp

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Company website(s)	www.alticor.com
Key personnel	Steve Van Andel (Chairman) Doug DeVos (President)

Company activity Direct selling of household and other consumer goods

Corporate summary Amway is a leading direct sales company operating in cosmetics and toiletries, household care, consumer healthcare and packaged foods.

While financial data for Amway is limited owing to its private status, Alticor, its parent company reported net sales for the year ending December 31st, 2008 of US\$8.2 billion representing 15% growth over 2007.

Despite the economic downturn it was still able to post strong growth owing to its high exposure in emerging markets, with 80% of its sales being generated outside its domestic US market. The Chinese and Indian markets remained relatively buoyant and whilst the Russian economy suffered, Amway was able to benefit from an increase in demand for its masstige brands.

Key events	2009	Business agreements
		– (July 15) Amway Global announced today that Marta, forward for the Los Angeles Sol of Women's Professional Soccer, has entered into a multi-year contract to endorse the company and its health and beauty power brands, NUTRILITE and ARTISTRY.
		Legal / regulatory affairs
		– (January 29) BERR (reformed DTI) submitted two appeals in the case alleging procedural irregularities. On January, 29, 2009 the appeals were dismissed.
	2008	Executive news
		– (May 21) Alticor Inc. announced the appointment of Russell A. Evans as the company's new executive vice president and chief financial officer.
		Legal / regulatory affairs
		– (May) The case against Amway brought by Department of Trade and Industry (DTI) is dismissed.
	2007	Brand extensions
		– Through Alticor Corporate Enterprises (ACE) a \$100 million, 337-room JW Marriott Grand Rapids luxury 24-floor hotel officially opened in August 2007.
		Legal / regulatory affairs
		– (May) The Department of Trade and Industry (DTI) in the UK initiated civil court proceedings against Amway following a year's investigation.
	– (March) Procter & Gamble was awarded US\$19 million by a US District Court in Salt Lake City, in relation to a lawsuit filed against four Amway distributors in 1995.	
	Restructuring	
	– Alticor announced that the Quixtar business in North America will transition to the Amway name before the end of 2009.	
2006	Acquisitions	
	– (July 28) Alticor Inc. announced that it acquired Gurwitch Products, a luxury cosmetics and skin care company that develops, manufactures and markets cosmetics under the brand name Laura Mercier®, from The Neiman Marcus Group.	
	– (July) Purchases Gurwitch Products, the licensee of the Laura Mercier premium cosmetics brand.	
	Legal / regulatory affairs	
	– (December 1) Alticor's direct sales arm Amway is granted a direct sales licence by the Chinese Ministry of Commerce on December 1. The company established a retail presence on the Chinese market while a ban on direct sales was in place.	
2004	Executive news	
	– (December 7) Jay Van Andel, co-founder of Amway Corp, dies on December 7 at his home in Ada, Michigan. He was 80.	
	Geographic expansion	
	– (March) Enters its 57th market with opening of Amway Russia. It's main office is located in Moscow.	
2003	Distribution & logistics	
	– (March 12) Amway invests US\$29 million to set up 100 stand-alone stores. Amway says two-thirds of store sales are not to customers but to its own sales representatives.	
	– (January 21) Amway opens a 40,000 sq m distribution centre in Guangzhou.	
	Internet / e-commerce	
	– (July) Amway (M) Sdn Bhd, a subsidiary of Alticor Inc, will invest RM5 million over the next 12 months to strengthen its information technology infrastructure. The investment will include upgrading the company's main computer system and its digital link between its 10 regional distribution centres, with the aim to increase efficiency and productivity.	
	Other topics	
	– (June) Alticor announces that it will invest US\$120 million in its Chinese operations. The majority of the latest injection of funding will be used to expand food and nutrition supplements production at Amway's manufacturing plant in Guangzhou.	
	Product launches	
	– (November) Amway India launches Nutrilite Kids Berry Blast, a nutritional drink for children.	

Norway

Market share table

Top Cosmetics and Toiletries companies in Norway by % market share 2008

Table 4.1141

% Retail Value RSP

Company	2004	2005	2006	2007	2008	2004-2008 change
L'Oréal Norge AS	17.30	17.49	17.83	17.95	18.41	+1.11
Lilleborg AS	14.49	13.72	13.33	12.30	11.94	-2.55
Procter & Gamble Norge AS	7.11	9.03	8.89	11.54	11.21	+4.10
Engelschiøn Marwell Hauge AS	6.79	7.16	7.13	7.52	8.90	+2.12
Midelfart Sonesson AS		0.01	6.97	7.29	7.14	
Beiersdorf AS	5.04	5.12	5.20	5.25	5.24	+0.20
Colgate-Palmolive Norge AS	3.13	3.30	3.37	3.48	3.56	+0.43
Christian Dior AS (Norway), Parfums	2.13	2.19	2.20	2.17	2.19	+0.06
Bonaventura Sales AS			0.27	1.44	2.16	
Estée Lauder Cosmetics AS	2.03	1.91	1.88	1.86	1.87	-0.16
Dermanor AS	0.01	0.19	0.96	1.19	1.32	+1.31

Source: Euromonitor International from trade sources/national statistics

Note: Companies will not be profiled under Norway unless they have a physical presence in Norway

Brand share table

Top Cosmetics and Toiletries brands in Norway by % brand share 2008

Table 4.1142

% Retail Value RSP

Brand (company)	2004	2005	2006	2007	2008	2004-2008 change
Max Factor (Engelschiøn Marwell Hauge AS)	2.25	2.40	2.50	2.68	2.82	+0.57
Define (Lilleborg AS)	2.28	2.67	2.74	2.73	2.68	+0.39
Wella (Procter & Gamble Norge AS)	2.42	2.50	2.60	2.50	2.45	+0.03
L'Oréal Perfection (L'Oréal Norge AS)	2.23	2.15	2.22	2.02	2.01	-0.22
Dove (Lilleborg AS)	2.00	2.11	2.09	2.02	1.92	-0.08
Colgate (Colgate-Palmolive Norge AS)	1.50	1.66	1.71	1.80	1.89	+0.39
Lancôme (L'Oréal Norge AS)	1.83	1.74	1.68	1.72	1.79	-0.04
Biotherm (L'Oréal Norge AS)	1.41	1.54	1.57	1.63	1.67	+0.26
Clairol Herbal Essences (Midelfart Sonesson AS)			1.80	1.73	1.61	
Natusan (Midelfart Sonesson AS)			1.68	1.61	1.56	
Vichy (L'Oréal Norge AS)	0.90	1.10	1.14	1.30	1.48	+0.57
Palmolive (Colgate-Palmolive Norge AS)	1.28	1.29	1.32	1.34	1.33	+0.06
L'Oréal Dermo-Expertise (L'Oréal Norge AS)	1.30	1.33	1.32	1.29	1.27	-0.02
Christian Dior (Christian Dior AS (Norway), Parfums)	1.10	1.19	1.25	1.25	1.27	+0.17
El'Vital (L'Oréal Norge AS)	1.10	1.27	1.36	1.32	1.26	+0.16

Source: Euromonitor International from trade sources/national statistics

Japan

Market share table

Top Cosmetics and Toiletries companies in Japan by % market share 2008

Table 4.899

% Retail Value RSP

Company	2004	2005	2006	2007	2008	2004-2008 change
Shiseido Co Ltd	15.22	15.68	16.37	16.18	15.75	+0.53
Kao Corp	9.45	9.50	9.35	9.23	9.19	-0.26
Kosé Corp	6.14	6.15	5.86	5.83	5.90	-0.23
Lion Corp	3.86	3.70	3.44	3.35	3.40	-0.46
Unilever Japan KK		3.26	3.19	3.15	3.24	
Pola Cosmetics Inc	2.82	2.71	2.51	2.50	2.54	-0.29
Max Factor KK	1.99	1.97	1.88	1.88	1.94	-0.05
Mandom Corp	1.79	1.72	1.65	1.60	1.61	-0.18
Sunstar Inc	1.67	1.65	1.60	1.58	1.61	-0.06
Procter & Gamble Far East Inc	1.60	1.49	1.52	1.52	1.60	

Source: Euromonitor International from trade sources/national statistics

Note: Companies will not be profiled under Japan unless they have a physical presence in Japan

Brand share table

Top Cosmetics and Toiletries brands in Japan by % brand share 2008

Table 4.900

% Retail Value RSP

Brand (company)	2004	2005	2006	2007	2008	2004-2008 change
Kosé (Kosé Corp)	2.98	3.00	2.81	2.80	2.81	-0.17
Sofina (Kao Corp)	2.70	2.71	2.58	2.59	2.20	-0.49
Shiseido (Shiseido Co Ltd)	1.39	1.57	2.22	2.23	2.14	+0.75
FT Shiseido (Shiseido Co Ltd)	0.70	0.70	1.78	1.77	1.72	+1.01
Bioré (Kao Corp)	1.26	1.33	1.41	1.41	1.51	+0.25
Lux Super Rich (Unilever Japan KK)		1.17	1.20	1.18	1.21	
SK-II (Max Factor KK)	1.15	1.17	1.11	1.11	1.17	+0.01
Clé de Peau Beauté (Shiseido Co Ltd)	0.98	1.03	1.04	1.04	1.09	+0.11
Dove (Unilever Japan KK)		1.09	1.03	1.03	1.05	
Elixir (Shiseido Co Ltd)	1.06	1.14	1.05	1.05	1.03	-0.03
Pola (Pola Cosmetics Inc)	1.15	1.09	1.00	0.99	0.99	-0.16
Asience (Kao Corp)	0.44	0.68	0.92	0.88	0.94	+0.49
Cosme Decorte (Kosé Corp)	0.79	0.78	0.74	0.74	0.78	
Benefique (Shiseido Co Ltd)	0.68	0.73	0.74	0.74	0.78	+0.10
Gatsby (Mandom Corp)	0.72	0.74	0.72	0.70	0.71	-0.01

Source: Euromonitor International from trade sources/national statistics

Beiersdorf AG

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Company website(s)	www.beiersdorf.com
Key personnel	Thomas B Quaas (Chairman and Chief Executive Officer) Dr Bernhard Düttmann (Chief Financial Officer) Pieter Nota (Director, Marketing)

Company activity Manufacturer of cosmetics and toiletries, OTC health care products and technical adhesive tapes

Corporate summary Beiersdorf is a leading international consumer goods company which has interests in the cosmetics and toiletries, OTC healthcare and adhesive tape industries.

Beiersdorf has performed well in 2008 increasing its market share from 3.3% in 2007 to 3.4% in 2008. The firm's performance can be attributed to its focus on fast growing market segments. The company performed well during the first half of 2009 and within the consumer business segment as a whole recorded a slight increase despite the current downward trend in the retail sector. Beiersdorf reported a 0.3% organic sales growth in 2009 mainly due to high performance in the Swiss and German markets.

Established 1882

Key events	<p>2009 Executive news</p> <ul style="list-style-type: none"> – (September) Beiersdorf has extended Executive Chairman Thomas-B Quass's contract for another five years. <p>Manufacturing changes</p> <ul style="list-style-type: none"> – (August 6) Beiersdorf inaugurated a new production plant to manufacture body care products in Shanghai, China. The company invested a total of around €18 million in the new facility, whose initial annual output will be 15,000 tons. – (June 7) Beiersdorf has invested some €10 million in doubling manufacturing capacity for NIVEA products at its location in Bangplee, Thailand to 31,000 tons per year. <p>2008 Divestments and demergers</p> <ul style="list-style-type: none"> – (November 24) 3M and Beiersdorf announced today that 3M has entered into a definitive agreement to acquire the FUTURO health supports and compression hosiery product line from Beiersdorf. – (October 20) Paul Hartmann AG signed an agreement with Beiersdorf AG to acquire a 100% interest in Beiersdorf affiliate Bode Chemie GmbH & Co. KG <p>Geographic expansion</p> <ul style="list-style-type: none"> – (November 11) Today Beiersdorf opened its second NIVEA Haus. This oasis of relaxation invites visitors to come in and unwind in the world's largest shopping mall in Dubai, which has 1,200 shops. Beiersdorf launched the new trend for quick wellness in 2006 with its first NIVEA Haus in Hamburg. – (September 19) Beiersdorf AG is to open two new NIVEA "Häuser". The innovative concept of quick and easy wellness, which has proved a major success at the principal location of the Company and the NIVEA brand in Hamburg, will expand to Dubai (United Arab Emirates) at the end of October and Berlin in February 2009. <p>2007 Acquisitions</p> <ul style="list-style-type: none"> – (February) Beiersdorf AG plans to acquire a stake in Chinese hair care and styling company C-BONS Hair Care (Slek, S-Dew, Maestro and Hair Song brands), part of Chinese consumer products group C-BONS Holding, in order to accelerate its expansion in the Chinese market. <p>Advertising & marketing</p> <ul style="list-style-type: none"> – (February) Beiersdorf launches the first UK advertising campaign in 13 years for its longest running product, Nivea Cream. <p>Distribution & logistics</p> <ul style="list-style-type: none"> – (March) Brazilian subsidiary of Beiersdorf AG begins the online sales of its products under the Nivea brand in February. – (January 22) La Prairie opens the doors to its second travel-retail flagship located at Hong Kong International Airport. <p>Geographic expansion</p> <ul style="list-style-type: none"> – (February) Beiersdorf expands its portfolio into the Czech Republic and the Slovak Republic markets with the launch of its dermocosmetics range, Eucerin. <p>Product launches</p> <ul style="list-style-type: none"> – (June) Beiersdorf's Nivea Beaute emphasizes volume in two new make-up products. A Volume Impact mascara replaces Nivea's Max Impact mascara that launched in 2005. A new lip-gloss line Volume Shine Glace comes in six shades. Both products launch in European outlets in June. – (April) Dermocosmetic brand Eucerin rolls out its latest skin care innovation in Europe. Hyaluron-Filler marks the brand's will to forge ahead in the anti ageing skincare segment. The relaunch of another anti ageing product, Modelliance - formerly produced by Beiersdorf's discontinued Onagrine brand - also joins the Eucerin family. – (February) Launch of La Prairie's Caviar Collection, which uses caviar extracts and sea proteins for lifting and illuminating. La Prairie Skin Caviar Luxe Body Emulsion, a body lotion that contains a contouring complex, is said to discourage the formulation of cellulite. La Prairie also launches Cellular Radiance Concentrate Pure Gold, which contains 24k gold particles. – (February) Beiersdorf incorporates a bronzing cream into its Nivea for Men Summer Look range.
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Poland

Market share table

Top Cosmetics and Toiletries companies in Poland by % market share 2008

Table 4.1223

% Retail Value RSP

Company	2004	2005	2006	2007	2008	2004-2008 change
Procter & Gamble Polska Sp zoo	5.16	9.95	10.13	10.17	10.14	+4.98
Avon Cosmetics Polska Sp zoo	11.99	10.94	9.51	9.09	9.08	-2.91
Coty Polska Sp zoo	5.62	6.45	6.29	6.09	5.96	+0.34
L'Oréal Polska Sp zoo	5.87	5.80	5.97	5.99	5.90	+0.03
Unilever Polska SA	4.69	4.64	4.69	4.69	4.70	+0.01
Henkel Polska Sp zoo	4.94	4.81	4.64	4.52	4.41	-0.54
Nivea Polska SA		4.14	4.25	4.23	4.23	
Colgate-Palmolive Polska Sp zoo	4.24	4.23	4.17	4.14	4.06	-0.18
Oriflame Poland Sp zoo	2.59	2.83	3.01	3.40	3.96	+1.37
Yves Rocher Polska Sp zoo	2.00	1.95	1.92	1.91	1.88	-0.12
Grupa Kolastyna SA	0.45	0.47	0.51	1.84	1.81	+1.35
Laboratorium Kosmetyczne Dr Irena Eris SA	1.45	1.51	1.50	1.51	1.50	+0.05
Ziaja Ltd Zaklad Produkcji Lekow Sp zoo	1.00	1.05	1.06	1.07	1.06	+0.06
Soraya SA	1.02	0.99	1.01	1.01	1.00	-0.02
Pollena-Ewa SA	0.80	0.80	0.79	0.77	0.78	-0.02

Source: Euromonitor International from trade sources/national statistics

Note: Companies will not be profiled under Poland unless they have a physical presence in Poland

Brand share table

Top Cosmetics and Toiletries brands in Poland by % brand share 2008

Table 4.1224

% Retail Value RSP

Brand (company)	2004	2005	2006	2007	2008	2004-2008 change
Avon (Avon Cosmetics Polska Sp zoo)	9.90	9.15	7.92	7.16	7.11	-2.79
Oriflame (Oriflame Poland Sp zoo)	2.14	2.34	2.43	2.76	3.05	+0.91
Gillette (Procter & Gamble Polska Sp zoo)		2.07	2.20	2.31	2.30	
Dove (Unilever Polska SA)	1.55	1.78	1.79	1.80	1.81	+0.26
adidas (Coty Polska Sp zoo)	1.47	1.52	1.50	1.46	1.42	-0.05
Yves Rocher (Yves Rocher Polska Sp zoo)	1.46	1.45	1.42	1.39	1.36	-0.10
Palette (Henkel Polska Sp zoo)	1.42	1.38	1.33	1.29	1.23	-0.19
Blend-a-Med (Procter & Gamble Polska Sp zoo)	1.30	1.29	1.27	1.20	1.16	-0.14
Polsilver (Procter & Gamble Polska Sp zoo)		0.99	1.05	1.11	1.10	
Elsève (L'Oréal Polska Sp zoo)	1.07	1.06	1.10	1.11	1.09	+0.02
Ziaja (Ziaja Ltd Zaklad Produkcji Lekow Sp zoo)	1.00	1.05	1.06	1.07	1.06	+0.06
Pantene Pro-V (Procter & Gamble Polska Sp zoo)	0.95	0.95	0.95	0.95	1.00	+0.05
Soraya (Soraya SA)	0.98	0.94	0.97	0.97	0.96	-0.02
Colodent (Colgate-Palmolive Polska Sp zoo)	1.08	1.04	1.01	1.00	0.96	-0.12
Palmolive (Colgate-Palmolive Polska Sp zoo)	0.91	0.97	0.97	0.97	0.95	+0.04

Source: Euromonitor International from trade sources/national statistics