

Strong growth in emerging markets

Emerging markets, such as Russia and China, showed the strongest growth in 2003, as rising levels of disposable income spurred demand for higher-value products. In addition, improvements to distribution systems, including the development of large scale supermarket/hypermarket channels and the expanded presence of direct sales companies, which proved particularly well-suited to conditions in developing regions, served to introduce consumers to an increasingly broad range of cosmetics and toiletries products. Similarly, the geographic expansion of major multinational manufacturers also increased the availability and sophistication of products in emerging markets.

Global sales

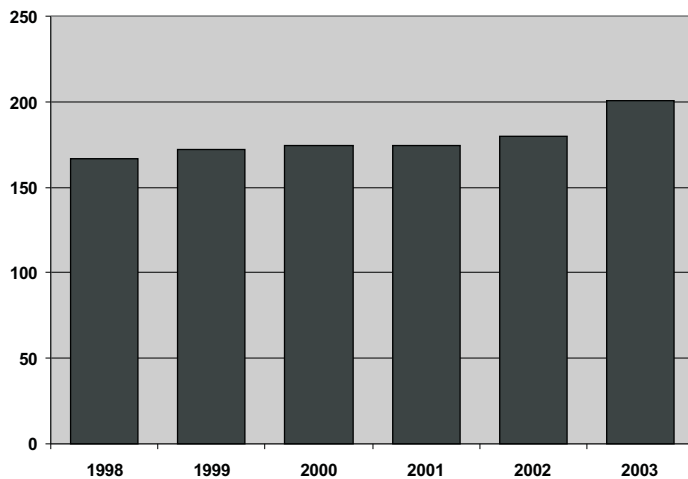
Global Demand

- Intensive pricing competition amongst retailers acted as a significant constraint on growth in major developed markets, including the world’s largest national market, the US.
- Economic difficulties afflicted a number of major markets in 2003, including Germany and Brazil, with a weak labour market undermining consumer confidence in the US.
- Despite constraints on growth, developed markets saw sales increase due to manufacturers’ development of new products, which were supported by aggressive marketing activity.
- Many markets witnessed the launch of sophisticated new products at the high end of the mass segment, which served to blur the lines between mass-market and premium goods.
- Product innovation was able to exploit a growing sophistication in consumer demand underpinned by a growing focus on health and beauty issues in the media, which targeted both men and women.
- Major markets in emerging regions saw growth generated by improving economic conditions, which drove up levels of disposable income and encouraged investment on the part of major manufacturers.
- Demographic and social changes in developing regions created conditions conducive to the expansion of the cosmetics and toiletries market, with rising numbers of women in the workforce and diminishing household sizes playing an important part in eroding traditional purchasing patterns and spurring demand.

The global cosmetics and toiletries market witnessed dramatic growth of over 11% in 2003. Growth was underpinned by manufacturers’ new product development strategies, which served to reinvigorate mature developed markets.

Chart 1 Global Sales of Cosmetics and Toiletries: Value 1998-2003

US\$ bn



Source: Euromonitor

● National Official Organisations

Argentina

Instituto Nacional de Estadística y Censos (INDEC)

(National Institute of Statistics and Censuses)

Address: Julio A. Roca 615 - PB, C1067 Buenos Aires
Telephone: +54 11 4349 9200
E-mail: ces@indec.mecon.gov.ar
Website: www.indec.mecon.ar

Website notes: official web site of INDEC. Offers a wide variety of national statistical data covering socio-economic and financial indicators. Access to different online publications and list of statistical publications for sale produced by the Institute. Available both in English (restricted) and Spanish

Statistical Coverage: statistics provided cover a wide range of indicators. A compilation of most relevant socio-economic data can be found by downloading the "Anuario Estadístico". Data coverage period varies from table to table, though most offer figures for the last 5 years. Statistics are provided on: general geographic country data; population (latest census, 2001); social indicators (household consumption; education; health services; labour force); economic sectors (agriculture; manufacturing industry; commerce; communications; etc); financial activities; public and external sectors; price index; and national accounts

Guides to Publications: online catalogue and publications plan

Publications:

- **Anuario Estadístico de la República Argentina (Annual Statistical Yearbook)** — annual socio-demographic and economic statistics — *annual, (Statistical publication)*
- **Argentine Foreign Trade Statistics** — export and import statistics by destination and by country of origin — *quarterly, (Statistical publication)*
- **Encuesta Industrial Anual (Annual Industrial Survey)** — information covering the industrial sector, including: production value; income levels; employment; hours worked; consumption of energy — *quarterly, (Statistical publication)*
- **Situación y Evolución Social (Social Development Statistics)** — series of socio-economic indicators covering: demographic trends; family and households; education and health services; labour force and unemployment; etc — *annual, (Statistical publication)*

Australia

Australian Bureau of Statistics (ABS)

Address: ABS House, 45 Benjamin Way, Belconnen ACT 2617
Telephone: +61 2 9268 4909
Fax: +61 1300 135 211
E-mail: client.services@abs.gov.au
Website: www.abs.gov.au

Website notes: general information on ABS and its products and services. Offers a wide range of online services, including: statistical profile of Australia; guide to publications and products/main publication features; and economic and social data. It also includes media releases (access to archives back to 1997) and weekly statistical releases on specific socio-economic and financial topics

Statistical Coverage: statistical section provides a wide range of online social, economic and financial data. Among others, the Key National Indicators sub-section includes latest national socio-economic statistics covering different topics such as: consumer price index; GDP; unemployment rate; retail trade; average weekly earnings; estimated resident population; building approvals; new motor vehicle registrations; and company profits. Other annual statistical databases, online publications and special articles are available, some of these are subject to charge

Guides to Publications: online catalogue

Publications:

- **Agriculture, Australia** — structure of Australian farming sector, details of land use, crop and horticultural activity, livestock numbers and financial results — *annual, (Statistical publication)*
- **Australian Demographic Statistics** — estimates of total population for States, Territories and the whole of Australia — *quarterly, (Statistical publication)*
- **Consumer Price Index** — movements in retail prices of services and goods in urban Australia. Goods and services are divided into the following groups: food; clothing; housing; household equipment and operation; transportation; tobacco and alcohol; health and personal care; recreation and education — *quarterly, (Statistical publication)*
- **International Merchandise Trade, Australia** — statistics on trade activities (exports and imports) between Australia and its main trade partners. Data provided by commodity, state, major economic category and industry of origin, with some tables covering a period of 12 years — *annual, (Statistical publication)*
- **Labour Statistics, Australia** — statistical overview of the labour force in Australia: socio-demographic characteristics; employment, unemployment and underemployment; earnings, labour costs and employment benefits; working hours, industrial relations, training and international comparisons — *annual, (Statistical publication)*
- **Manufacturing Industry, Australia** — compilation of final results from the Manufacturing Survey for establishments across Australia. Data on employment and wages; turnover; and industry value-added (IVA) classified by industry class — *annual, (Statistical publication)*
- **Manufacturing Production, Australia** — estimates of production quantities for 28 major indicators, including food, wood products, fuels, building materials and metals. Contains original, seasonally adjusted and trend data for quarterly items — *quarterly, (Statistical publication)*
- **Manufacturing Production, Australia: Food, Drink, Tobacco, Stock and Poultry Food** — annual production statistics for a wide range of food and drink products, as well as tobacco and cigarettes — *annual, (Statistical publication)*
- **Motor Vehicles in Australia** — overview of the Australian Automotive market: statistics including Motor Vehicle Census counts; annual new motor vehicle registration data, information; vehicle ownership; and vehicle manufacturing, retailing and trade data. Most tables and graphs are complemented by an analytical commentary on the statistics — *annual, (Statistical publication)*

- **Retail Trade Australia** — statistics covering the Australian retail industry: estimates turnover for retail and selected service establishments for all States and Australia in current prices — *monthly, (Statistical publication)*
- **Sales of Australian Wine and Brandy by Winemakers** — quantity of wine sales classified by type (fortified, table, sparkling, etc.) and brandy. Sales of table wine further classified by container type. Wine and brandy exports and imports cleared for home consumption. Includes seasonally adjusted and trend estimates — *annual, (Statistical publication)*
- **Tourism Indicators, Australia** — overview of the tourism industry in Australia, combining data from the Survey of Tourist Accommodation (STA) and Overseas Arrivals and Departures (OAD) collections — *annual, (Statistical publication)*
- **Yearbook Australia** — compilation of annual statistics, combining data from various publications and surveys. Covers Australia's geography and climate, government, international relations and defence and a wide range of socio-economic indicators — *annual, (Statistical publication)*

Austria

Österreichisches Statistisches Zentralamt (ÖSTAT)

(Austrian Central Statistical Office)

Address: General Information Service, Hintere Zollamtsstraße 2b, 1035 Vienna
Telephone: +43 1 71128-7070
Fax: +43 1 715 6828
E-mail: info@statistik.gv.at or bibliothek@statistik.gv.at
Website: www.statistik.at

Website notes: official site of ÖSTAT, including information on products and services; compilation of latest press releases; and access to various online publications and databases, some of these subject to a fee

Time series data covering a variety of socio-economic statistics for Austria and EU including: balance of payments; prices; income and expenditure; land and forestry; environment; domestic trade; travel and tourism; foreign trade; population, etc. Historical data starts from 1980.

Obtaining Publications: as above

Guides to Publications: Publikationsangebot (list of publications, 2 p.a.); The Austrian Central Statistical Office (English, gives details of legal basis, history, organisation)

Publications:

- **Außenhandel Österreichs (Austrian External Trade)** — foreign trade information and statistics — *annual, (Statistical publication)*
- **Bestandsstatistik der Kraftfahrzeuge (Austrian Automotive Industry Statistics)** — statistics on motor vehicles in Austria: registrations by makes and types of vehicle — *annual, (Statistical publication)*
- **Demographisches Jahrbuch Österreichs (Demographic Yearbook of Austria)** — *annual, (Statistical publication)*
- **Energieversorgung Österreichs** — energy supply statistics — *monthly, (Statistical publication)*
- **Ergebnisse der Landwirtschaftlichen Statistik (Agriculture Statistics)** — statistics on agriculture and forestry, including field crops, wine fruit, cattle, milk and meat production. Includes regional data — *annual, (Statistical publication)*
- **Gesundheitsstatistisches** — information and statistics on the Austrian health service system — *annual, (Statistical publication)*
- **Handel, Dienstleistungen** — service industry statistics covering: employment; wages; industry investment; expenditures; market size, etc. — *annual, (Statistical publication)*
- **Kraftfahrzeugzulassungstatistik** — new motor vehicle licensing statistics by make of vehicle — *monthly, (Statistical publication)*
- **Österreichs Volkseinkommen (Austrian national income statistics)** — statistics on Austrian wages, salaries and incomes — *annual, (Statistical publication)*
- **Statistik der Aktiengesellschaften in Österreich (Austrian Joint Stock Companies Statistics)** — statistics on joint stock companies, including incorporated banks and insurance companies — *annual, (Statistical publication)*
- **Statistische Nachrichten (Statistical News)** — monthly figures covering main time series: population, employment, production, retail sales, wages and prices, etc; a 40 page supplement - Statistical Monitoring Reviews - contains regular updates of national and international economic and social indicators — *monthly, (Statistical publication)*
- **Statistisches Jahrbuch für die Republik Österreich (Austrian Statistical Yearbook)** — general statistical yearbook - includes a wide range of annual socio-economic, demographic, cultural, and other statistics on the Austrian republic — *annual, (Statistical publication)*
- **Tourismus in Österreich (Tourism in Austria)** — tourism statistics containing information on arrivals and departures, and accommodation statistics. Includes regional breakdowns — *annual, (Statistical publication)*
- **Umweltdaten (Environmental Statistics)** — *irregular, (Statistical publication)*

Belgium

Institut National de Statistique

(National Institute of Statistics)

Address: 44, rue de Louvain, 1000 Brussels
Telephone: +32 2 548 6365/6
Fax: +32 2 548 6367
E-mail: info@statbel.fgov.be
Website: www.statbel.fgov.be

Website notes: general information on the National Statistical Institute and its services; latest press releases; annual socio-economic surveys; list of major

● India

Rank of top Cosmetics and Toiletries companies in India by market share 2003

Rank	Company	% retail value
1	Hindustan Lever Ltd	40.73
2	Colgate-Palmolive India Ltd	8.30
3	Godrej Consumer Products Ltd	4.45
4	Dabur India Ltd	4.12
5	Nirma Ltd	3.92
6	Johnson & Johnson Ltd	3.59
7	Gillette India Ltd	2.50
8	CavinKare Pvt Ltd	1.94
9	Amway India Enterprises	1.87
10	Marico Industries Ltd	1.70

Note: Companies listed above will not be profiled if they do not have a physical presence within India

Amway India Enterprises

Address	A-5 Kailash Colony, New Delhi, 110 048		
Telephone	+91 11 6282781 / 11 6489636	Fax	+91 11 6237348
Company website(s)	www.amway.com		
Key personnel	Sanker Parmeswaran (Director); William Pinckney (Chief Executive Officer)		
Parent company	Alticor Inc (USA)		
Company activity	Manufacturer and direct seller of home care and personal care products.		

Company notes: Amway is continuing to expand in India with the commissioning of a manufacturing facility for Nutrilite Protein Powder. The brand Nutrilite is the world's largest dietary supplement brand. A multi-vitamin for children, Nutrilite, was launched in early 2003. In addition, there are plans to expand the Persona personal care range to include a family bar soap, shaving cream and after shave lotion. New products are also to be incorporated into the Artistry Basic skin care products, and it is forecast that cleaner, toner and moisturiser will be added to the range.

Table 4. 701

Company shares and market rank

Sector	Unit	2000 (rank)	2001 (rank)	2002 (rank)	2003 (rank)
Cosmetics and Toiletries	% retail value	-	1.72 (9)	1.75 (9)	1.87 (9)

Table 4. 702

Leading brands	Sector	Brand
Industry (latest year) Cosmetics and toiletries (2003)	Skin care	Amway
OTC healthcare (2003)	Vitamins and dietary supplements	Nutrilite
Household care (2003)	Surface care	See Spray
Additional websites	Address	Name (country)
National website:	www.amway-in.com	(India)

CavinKare Pvt Ltd

Address	CavinVille, 12 Cenotaph Road, Chennai, 600 018
Telephone	+91 44 2431 7550
E-mail	corpcomm@cavinkare.com

Table 4. 703

Company shares and market rank

Sector	Unit	2000 (rank)	2001 (rank)	2002 (rank)	2003 (rank)
Cosmetics and Toiletries	% retail value	-	1.76 (8)	1.82 (8)	1.94 (8)

Table 4. 704

Leading brands	Sector	Brand
Industry (latest year) Cosmetics and toiletries (2003)	Hair care	Chik, Nyle
	Skin care	Fairever
Websites	Address	Name (country)
e-commerce website:	www.cavinkare.com	(India)

Lever Fabergé Ltd

Address 3 St James's Road, Kingston-upon-Thames, KT1 2BA, Surrey
Telephone +44 1604 701111 **Fax** +44 1604 701120
Company website(s) www.leverfaberge.co.uk
Parent company Unilever Group (United Kingdom)
Company activity Producer of home care and personal care products including detergents and body sprays.

Table 4. 1450

Employees	1998	1999	2000	2001	2002	2003
Number of employees	-	-	1,913	-	2,700	-

Table 4. 1451

Company shares and market rank

Sector	Unit	2000 (rank)	2001 (rank)	2002 (rank)	2003 (rank)
Cosmetics and Toiletries	% retail value	-	8.33 (1)	8.61 (1)	8.75 (1)

Table 4. 1452

Leading brands

Industry (latest year)	Sector	Brand	
Cosmetics and toiletries (2003)	Bath and shower products	Dove, Lifebuoy, Lux, Lynx, Pears, Physio Sport, Shield	
	Deodorants	Dove, Impulse, Lynx, Physio Sport, Sure, Vaseline Intensive Care	
	Fragrances	Addiction, Brut, Fusion, Lynx	
	Hair care	Dove, Lynx, Organics, Salon Selectives, Sunsilk, Timotei	
	Men's grooming products	Lynx, Physio Sport, Sure, Vaseline Intensive Care	
	Oral hygiene	Mentadent, Signal	
	Skin care	Dove, Pond's, Vaseline Intensive Care	
	Retail disposable paper products	Dove	
	Disposable paper products (2003)	Chlorine bleach	Domestos, Domestos Ox
		Dishwashing products	Persil
Comfort, Comfort Vaporesse, Persil, Persil Black Velvet, Refresh, Stergene, Surf			
Household care (2003)		Surface care	Cif, Cif Oxy Wipes, Cif Window & Glass Wipes, Domestos, Domestos Household Cleaning Wipes
	Toilet care products	Domestos	

Procter & Gamble Ltd

Address The Heights, Brooklands, Weybridge, KT13 0XP, Surrey
Telephone +44 1932 896000 **Fax** +44 1932 896200
Company website(s) www.pg.com
Key personnel Chris De Lapuente (Managing Director)
Parent company Procter & Gamble Co, The (USA)
Company activity Production of cosmetics, toiletries, baby products; also disposable paper products, detergents, margarine, industrial shortenings, chemicals.

Table 4. 1453

Employees	1998	1999	2000	2001	2002	2003
Number of employees	5,295	5,814	5,652	-	-	-

Financial year end June

Table 4. 1454

Company shares and market rank

Sector	Unit	2000 (rank)	2001 (rank)	2002 (rank)	2003 (rank)
Cosmetics and Toiletries	% retail value	-	7.29 (2)	7.04 (2)	7.19 (2)

Table 4. 1455

Leading brands

Industry (latest year)	Sector	Brand
Cosmetics and toiletries (2003)	Bath and shower products	Camay, Fairy, Oil of Olay
	Colour cosmetics	Olay
	Deodorants	Mum, Old Spice, Secret
	Fragrances	Boss Bottled, Boss in Motion, Boss Intense for Woman, Ghost, Giorgio by Giorgio Beverly Hills, Gucci Rush, Hugo, Hugo Dark Blue, Hugo Deep Red, Hugo Woman, Lacoste Pour Femme, Old Spice
		Aussie, Clairol Herbal Essences, Clairol Hydrience, Clairol Lasting Colour, Clairol Loving Care, Clairol Nice 'n' Easy, Head & Shoulders, Pantene Pro-V, Vidal Sassoon, Wash & Go
	Hair care	Circ, Old Spice
	Men's grooming products	Crest, Denclean, Fixodent
	Oral hygiene	Oil of Olay, Olay, Regenerist
	Skin care	Vicks Inhaler, Vicks Sinex, Vicks Vaporub
	OTC healthcare (2003)	Digestive remedies
Disposable paper products (2003)	Retail disposable paper products	Alldays, Always, Bounty, Charmin, Charmin Ultra, Flash All Purpose, Flash Express, Oil of Olay, Pampers, Pampers Active Fit, Pampers Easy Ups, Swiffer, Tampax, Tempo
	Household care (2003)	Dishwashing products
	Laundry care	Ace, Ariel, Bold, Bounce, Daz, Dreft, Fairy, Febreze, Lenor
	Surface care	Flash, Flash All Purpose, Flash Dry Dusting, Flash Dry Dusting Refill, Flash Express, Swiffer, Swiffer Refill, Viakal
Packaged food (2003)	Sweet and savoury snacks	Pringles
Soft drinks (2002)	Fruit/vegetable juice	Sunny Delight, Sunny Delight