

Representing direct selling in Europe

ANNUAL REPORT 2013-2014



The European
Direct Selling Association

Table of Contents

03

Chairman's
Statement

05

Mission
Statement

05

Seldia
Organisation

06

Activity
Report

General Assembly	06
Board of Directors	07
Legal & Government Affairs ' Committee	08
Companies' Committee	10
Non-EU DSAs' Committee (NED)	12
Ethics' Committee (EC)	14
Communications	16

20

Appendices

Socio-Economic Report	20
Statistics	24
Member DSAs	27
Corporate Members	31
Services Providers	32
Membership of Committees	34
Staff	34



Magnus Brännström
Chairman

*“Seldia creates great
initiatives to improve the
operating environment for
our industry ”*

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Chairman's Statement

2014 was a fantastic and dynamic year in the representation of direct selling in Europe and it is my pleasure to highlight our main achievements over the last twelve months.

In a nutshell, Seldia put its main focus on the following areas in 2014:

1. EU advocacy
2. Further enhancement of the PR role of Seldia on the Brussels scene
3. Promotion of female entrepreneurship
4. Continued support and partnership with our member DSAs

Let me start by referring to some of the successes in our core business, **advocacy**. The last twelve months have shown that Seldia could make a difference at both European and national level. At national level we faced situations where new legislation could have affected us in a less than positive way. For example, the regulations on sales events to stop rogue traders in certain Central European countries that unjustly encompassed all off-premises channels including direct selling, notably in the Czech Republic and Slovakia.

Seldia acted rapidly and together with the national DSAs managed to avoid introduction of such unbalanced legislation. As a result, the new regulations were formulated in such a way that they specifically addressed pressure selling and explicitly exempted ethical direct selling companies.

At European level Seldia focused on **explaining and promoting the benefits of direct selling to the European Parliament**. Due to concerns about the so-called excursion sales some Members of European Parliament put forward proposals to carry out sweep investigations into our sector. Seldia was able to react swiftly and prevent the possible stigmatization of the whole sector. Our efforts were supported by friendly and knowledgeable Members of European Parliament whom we had introduced to the direct selling model through our support to the Woman Entrepreneurship Platform (WEP¹).

Entrepreneurship is at the core of what we do and we are therefore proud to be initiator and supporter of the Women Entrepreneurship Plat-

form. We have successfully rallied twenty five Members of European Parliament to become “Champions” of our Platform. Some of them have hosted our events in the European Parliament. In the last twelve months we have organized another two successful events with over 100 participants each. Due to this success we have

“We have successfully rallied 25 Members of European Parliament to become “Champions” of our Platform.”

been able to grow our network of member organizations to over thirty non-government organizations that support women entrepreneurship. We have also attracted a co-sponsor,

consulting group Deloitte and we are expecting more support in the future.

Entrepreneurship will also be the red line in our 4th European Direct Selling Conference, which is to be held on 2 October 2014. Over the last three issues of the conference we have been able to grow our participation to over 150. We expect further growth this year with an attractive program that will highlight the strengths of our sector and try to unveil the trends of the future.

¹ www.womenentrepreneurshipplatform.eu

Ethics should always be an integrated part of our business and I am therefore pleased to report on our related activities in 2014. We have started to work on further defining our trading standards, for example in the area of health claims. It is important that we abide by clear and fair health claims and ensure compliance with the strict European legislation in this area. Our efforts have therefore focused on providing guidance to companies on how to comply with laws and codes in times of Internet. For the coming year I expect this guidance to be implemented.

Another achievement of the last twelve months is the setting up of an online complaint platform for consumers. This platform will bring us in compliance with the new European law on self-regulation which will enter into force in 2015. This work has been carried out in cooperation with the French consumer organiza-

tion *Association Léo Lagrange Pour la Défense des Consommateurs*. I would like to express my thanks to this organization for their understanding of our sector and willingness to work with industry to optimize consumer redress.

Speaking of our consumers I can't avoid mentioning their firm belief in us during the last twelve months. Sales in the European Union grew from €18 billion the year before² to an all-time high of €18.7 billion. Most European Member States have shown positive growth, with Russia being the strongest growth market outside the EU. The Russian market now represents €3.3 billion sales making it the 3rd biggest market for companies operating in Europe, after Germany and France.

Over the last year Seldia also worked on the Transatlantic Trade and Investment Partnership (TTIP) with the USA and the Trade in Services

Agreement (TiSA) of the World Trade Organisation. At both levels we made it clear to the international trade negotiators that we wanted a formal recognition of our sector and improved trading conditions. Both Seldia initiatives will continue over the next year as a priority activity.

I am happy to say that in most of the mentioned initiatives we enjoyed strong support from the World Federation of Direct Selling Associations (WfDSA). I would like to express my thanks to WfDSA and the US DSA for their support on international matters of common concern; we look forward to continuing our cooperation in the next year.

I wish you all much success in the coming year.

Yours,

Magnus Brännström

² Restated 2012 figure

Mission Statement

Seldia shall represent and promote, at European level, the interests of national Direct Selling Associations and of their members engaged in direct selling.



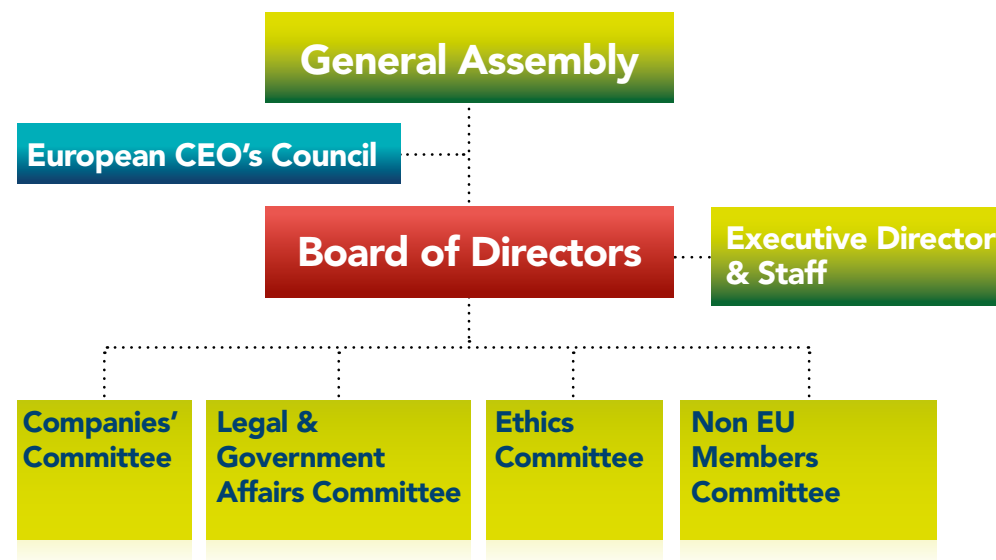
The European
Direct Selling Association

This mission will be achieved, in particular:

- Maintaining contacts with relevant EU officials and with other relevant business organisations and consumer interest groups in Brussels;
- Lobbying EU officials in defence of its members' interests with regard to any European legislative development that presents, as indicated by its members, any threat to the efficient operation of their direct selling businesses;
- In consultation with its members, determining and advocating new EU legislation in the interest of the efficient operation of pan European direct selling businesses;
- Promoting the economic and consumer benefits of the direct selling channel;
- Promoting a proper understanding of the way in which direct selling businesses are organised;
- Setting high standards, through a European code, for acceptable practices in selling methods and treatment of direct sellers;
- Disseminating to its members, legislative and other information of use in the efficient operation of its member associations.



Organisation



Activity Report



General Assembly

The General Assembly is composed of Full, Associate, Corporate and Honorary Members. It has all powers to achieve the objectives of the association other than the general management, which is the competence of the Board of Directors. The General Assembly is chaired by Seldia Chairman.

Actions 2013-2014

The General Assembly meets once a year and takes institutional decisions such as appointment of the Board of Directors' members or election of the Chairman. It approves the annual operating budget and the annual accounts, as well as applications of new members. It also approves the annual Action Plan of the association proposed by the Board of Directors.

In 2013, the General Assembly met on the 2nd of October in Brussels, in conjunction with Seldia's annual conference. In that meeting, it approved the 2014 Action Plan and the 2014 operating budget of the association. During that meeting, members of the General Assembly also discussed ethics in trading and best practices promotion developed by several of its member associations. In February 2014, the

General Assembly approved by written procedure the applications of the DSA of Kazakhstan as Associate Member, and of the German company PM International as Corporate Member.

In 2014, the Seldia General Assembly will meet on the 1st of October in Brussels.

Objectives 2014-2015

In 2014 the General Assembly will proceed to the election of the Chairman and of the Board of Directors for the term 2014-2016. Under the leadership of the Chairman, the General Assembly will pursue its mission to oversee Seldia's activities and consider recommendations made by the Board of Directors. Moreover it will ensure that the association's objectives are achieved to the best interest of the Member DSAs and Corporate Members.

Board of Directors

The Board of Directors defines the general policy of the Association, drafts the annual budget and Action Plan to be approved by the General Assembly and is responsible for the management of the association's resources and for the implementation of the Action Plan. The Board has six to eight members and meets three times a year. It is chaired by Seldia's Chairman

Actions 2013-2014

The Board of Directors met in Brussels in October 2013. In 2014, the Board met in February in Amsterdam in conjunction with the meeting of the CEOs Council, and in Stockholm in May.

In its October 2013 meeting, the Board reviewed the 2013-2014 Action Plan and 2014 operating budget, and agreed to recommend them to the approval of the General Assembly. Board members discussed ethics in direct selling and compliance with EU legislation. In a round-table discussion, Board members underlined national

developments and exchange information on issues of common interest.

The Board of Directors held its first meeting of 2014 on 19th of February, in Amsterdam. It acknowledged the resignation of two of its members and received a report on the evolution of issues affecting direct selling businesses in several countries, in particular in Czech Republic and in Austria. The Board also reviewed the application for membership of the DSA of Kazakhstan and of the German company PM International, and agreed to recommend these two applications to the approval of the General Assembly.

The second Board meeting took place in Stockholm, on 27th of May 2014. Board members reviewed the implementation of the 2013-2014 Action Plan and agreed on new Corporate membership criteria to be introduced in the Seldia Articles. The Board also discussed internal

affairs and agreed to propose new internal rules to the General Assembly.

Objectives 2014-2015

A new Board of Directors will be elected by the General Assembly in its meeting of 1st of October 2014. The Board will monitor the implementation of the association's Action Plan and make recommendations on activities to be undertaken to ensure that direct selling is well represented and promoted amongst key EU institutions, whilst remaining attentive to the need of its member DSAs and Corporate Members at local levels.



Legal & Government Affairs Committee



Imelda Vital (Amway),
Chairwoman of the Legal
& Government Affairs
Committee

The objective of the Legal & Government Affairs (LGA) Committee is to monitor and analyse European legislation related to direct selling, internal market, consumer protection, social affairs and international trade in order to protect and support the interests of the industry at the European level. Members of the LGA Committee are representatives of member DSAs and Corporate Members active in the assessment of EU legislation. The Committee meets three times per year and is chaired by Imelda Vital, Amway's EU Affairs and Corporate Affairs Area Manager.

Actions 2013-2014

The LGA Committee monitors upcoming EU proposals that could affect the direct selling industry and actively follows European Union legislative developments on a wide range of important EU dossiers amongst them the Consumer Rights Directive, the directive on Alternative Dispute Resolution, the Unfair Commercial Practices Directive, the Misleading and Comparative Advertisement Directive, e-Commerce and others.

Seldia and its Member DSA's are in the process of adapting to the new requirements set out in the Alternative Dispute Resolution directive which came into force in June 2013. For the direct selling code administrators to be officially recognized by the European Union, the new directive requires them to be nominated by both the DSA's and a consumer body. To this end, Seldia and the French consumer Federation Léo Lagrange¹ are in the process of setting up an online consumer complaint platform under www.fairselling.eu.

The Consumer Rights Directive, having been adopted in 2011, was translated into national law on 14 June 2014. The LGA committee monitored the process of transposition in each member country through surveys and

correspondence with national authorities. The committee also works with EU officials and national authorities in order to lift restrictions to direct selling that exist in some Member States. These restrictions are not compatible with EU law which foresees a harmonized market for direct selling.

With a mission to increase the association's visibility in the EU institutions, Seldia organized two events in the European Parliament in 2013 and in 2014 through which it introduced direct selling to numerous Members of the European Parliament and other EU officials.

The LGA Committee was also involved in the making of a Guide on Direct Selling introducing direct selling to all the new Members of the EU Parliament and highlighting five key recommendations for a stronger Single Market.

Seldia delegations visited the incoming presidencies of Greece (1 January 2014) and Italy (1 July 2014) and met with a range of ministry, consumer and civil society stakeholders to educate them on direct selling. Seldia also works closely together with the Internal Market Committee of EuroCommerce, the Brussels lobby for retail, wholesale and international trade in Europe.

¹ www.leolagrange-conso.org

Objectives 2013-2014

• Meeting the EU Council Presidencies

Meeting EU Council Presidencies of the European Union is important to assess and prepare EU decision making priorities in a timely fashion. Seldia will be travelling to Latvia and Luxembourg in preparation of the 2015 EU Council presidencies and meet with stakeholders from government, consumers, business and commerce.

• Increased visibility among European Institutions

Seldia will continue to pursue and implement its campaign in the EU institutions for more visibility and credibility for Direct Selling through events and media strategies. The LGA committee will be involved in introducing direct selling to new EU Policymakers that entered the Brussels scene, in particular with the beginning of the new legislative term.

• Enforcement EU Consumer Rights Law

The LGA Committee continues to closely monitor the correct application and enforcement of EU consumer rights laws into national legislation in order to avoid negative provisions affecting direct selling.

• Alternative Dispute Resolution

The LGA committee will be involved in adapting Seldia and member DSA code administrators with the aim to have them fully recognized by the European Union.

• Guidelines on Health Claims and Compensation Schemes

The Committee will continue monitoring developments on the European Sales law initiative and the Data Protection revision.



• Legal status of direct sellers

The LGA committee will pursue its initiative to centralise information on the status of direct sellers in European countries as well as harmonise the status of independent direct sellers throughout the EU. To this end, a special working group on Tax issues has been established in Brussels.

Companies Committee



Jaroslaw Mulewicz (Avon),
Chairman of Companies'
Committee

The Companies' Committee promotes the interests of multinational direct selling organisations in relation to regulatory, trade, commercial; marketing and other direct selling business matters. It is composed by representatives of Direct Selling companies and meets three times per year.

It monitors issues and legislative initiatives taken in EU Member States, including issues not directly related to direct selling. The Companies' Committee works in cooperation with the Legal & Government Affairs Committee and the Non-EU Member DSAs' Committee. It is chaired by Jaroslaw Mulewicz, Avon's EMEA Director for Regulatory and Government Affairs.

Actions 2013-2014

One of the main priorities of the Companies Committee for 2013/2014 was to identify restrictions to direct selling in national legislation and to evaluate and implement actions to remove such barriers. A comparative study conducted with corporate members in 2011 allowed Seldia to analyse the diverse national provisions on Direct Selling that represent remaining barriers. As a result, in 2011 the Companies' Committee filed a complaint to the European Commission on Austrian national legislation prohibiting the marketing of cosmetics through direct selling.

A big success came in July 2014 when the European Court of Justice (ECJ) ruled that Belgium's ban on door-to-door sales for products with a value higher than EUR250 is against EU law. The basis of the Court case is a complaint by Seldia (then FEDSA) filed with the European Commission in October 2007. The European Commission agreed with Seldia and started legal proceedings, which resulted after 7 years in a favorable ruling. Throughout 2013 and 2014 Seldia identified further national barriers which do not comply with EU law and will be tackling them through further complaints and advocacy strategies.

The Companies' Committee is instrumental in defining lobby campaigns as it is the logical platform through which corporate members can coordinate their efforts. Several national campaigns were coordinated with the committee and national DSA's to support them in local advocacy issues with a European perspective. Such campaigns took place in the Czech Republic and in Slovakia and in Hungary to a lesser extent. Another initiative pursued in 2013-2014 is the advocacy campaign on including a more specific recognition of direct selling within upcoming international trade agreements such as the Plurilateral Trade in Services Agreement (TiSA) and the Transatlantic Trade and Investment Partnership between the European Union and the United States.

The Companies' Committee also works on matters in countries outside the European Union in collaboration with the Non-EU DSAs Committee. With taxation issues arising in crucial direct selling markets in Albania, Croatia, Kazakhstan, Moldova, Ukraine and Turkey, the Committee identifies issues and proposes targeted solutions. Adding to this collaboration are also efforts by Seldia's corporate members to identify and establish new direct selling associations in European regions that lack such structures.

Objectives 2013-2014

• Abolition of remaining trade barriers

Seldia continues to pursue its efforts to succeed in the complaint against the Austrian ban to distribute cosmetics via direct selling. The Committee identified and will file complaints on further cases identified in other Member States.

• Tackling taxation issues

The Companies' Committee will pursue its efforts to assist the Direct Selling Associations and Companies to deal with taxation issues in certain countries.

• Advocacy on International Trade Agreements

Seldia will engage in an active advocacy programme towards the key negotiators involved in the negotiations on significant international trade agreements with the aim to have a more specific language on direct selling included, in particular in the Transatlantic Trade and Investment Partnership (TTIP) and the Plurilateral agreement on Trade in Services.

• Defining of lobby campaigns on EU regulatory issues

The Committee will continue to be instrumental in identifying clear cut lobby strategies in defense of the industry vis-à-vis upcoming EU legislation.

• Women Entrepreneurship and visibility among European Institutions

Seldia will continue to promote Women Entrepreneurship and the socio-economic benefits of direct selling with a focus on women entrepreneurs. Seldia will organize further events to implement its campaign for more visibility and credibility for Direct Selling in the European Union institutions.

• Supporting national European DSAs

The Committee will support the local staff of Direct Selling Associations to contact national authorities to tackle taxations and legal issues encountered by Direct Selling Organisations in specific countries. The Companies' Committee will work together with the Non-EU DSAs Committee on defining and implementing an advocacy program in problematic countries.

Non-EU DSAs Members' Committee



Michaela Beltcheva
(Oriflame), Chairwoman of
the Non-EU DSAs Members'
Committee

The objective of the Non-EU DSA's Committee is to promote the interests of Direct Selling and Direct Selling Associations in European countries that are not members of the European Union. The Committees' members are the representatives of the non-EU DSAs, namely Russia, Ukraine, Turkey, Norway and Kazakhstan; as well as representatives of Member Companies with an interests in these countries. The committee meets three times per year and conference calls are scheduled on short notice to react to major developments. Michaela Beltcheva, Government and Legal Affairs Advisor for Oriflame chairs the Committee.

Actions 2013-2014

Initially created in 2010 to support non EU-DSA members of Seldia in their advocacy towards national authorities, the Committee has evolved to actively track worldwide activities affecting direct selling companies. The Committee's central purpose is to support efforts of non-EU DSAs member companies and to monitor all areas related to the regulation of their markets such as trade law, taxation issues, social affairs issues, as well as horizontal regulation. While in July the Croatian DSA moved out of the Non-EU DSA's committee due to the country's entry into the European Union, in early 2014 Kazakhstan joined Seldia and became a new member of the Non-EU DSA's committee.

The meetings of the Non-EU DSAs Committee allow Seldia members to be informed and re-act towards developments in countries that are either bordering the EU or are based in other continents. The Committee has a real added value to the work of Non-EU DSA members as developments within the EU are often considered as best practices and not only by the associations but also by governments. Non-member associations from other continents look for advice on the European Code of Conduct and the Non-EU DSA Committee supports their efforts through talks with the European Commission during their bilateral trade negotiations.

Objectives 2013-2014

• Assisting Non-EU DSAs

The Committee will assist non-EU DSAs in tackling internal issues affecting Direct Selling. The issues can vary from taxation and customs legislation, labour and trade law to individual company cases where government affairs support is needed. Seldia will assist Non-EU DSAs in lobbying and in proactively building relationships with Brussels stakeholders.

• Supporting Non-EU DSA's in achieving WfDSA membership standards

Seldia to support Non-EU DSA's in complying with the membership standards as set out by the World Federation of Direct Selling Associations (WfDSA).

• Support for DSAs in EU accession process

The Committee will assist DSAs of countries that are preparing for EU accession in interpreting and adapting to relevant EU legislation.

• Establishment of new DSAs

The Committee will assist in conjunction with companies' interests the setting up of new associations in countries in which there is activity but no DSA yet established.

• Improving trade in Russia and Ukraine

The Non-EU DSA's Committee will pursue, in cooperation with the Companies Committee, its assistance to local DSAs to remove trade barriers and improve trade conditions in these countries.

Ethic's Committee



Professor Jules Stuyck,
University of Leuven, Belgium

The objective of the EC is to review, update and interpret the European Code of Conduct where necessary; to support independent Code Administrators of national DSAs in the interpretation of the Code; help national DSAs implementing them and; to propose rulings on complaints. The Committee is chaired by Prof. Jules Stuyck and has five members.

The Committee also acts as Code Administrator for the Seldia Code of Conduct towards Direct Sellers, between Direct Sellers and between Companies (B2B Code). The Code Administrator for the Seldia Code of Conduct towards consumers (B2C Code) is composed of the Chairman of the Ethics Committee, one member of the Ethics Committee representing a DSA and one representative of French consumer organisation Association Léo Lagrange pour la défense des consommateurs.

Actions 2013-2014

The Ethics Committee met on 30 September 2013 and on 27 May 2014 and held several discussions by conference calls in between these dates.

In its September 2013 meeting, the European Code Administrator examined several **B2B complaints** submitted to its attention by Seldia members and non-members. It agreed on actions to be undertaken in order to address these complaints with a constructive approach.

Committees' members worked on the development of the **complaint website and standard online complaint form** in cooperation with the consumers' association Association *Léo Lagrange pour la défense des consommateurs*. These two features, the website and online complaint form, are requirements of the newly adopted European Directive on Alternative Dispute Resolution. It is the intention that both website and online complaint form can be easily adapted by DSAs to fulfil the Directive's requirements at national level.

It also agreed on drafting of **guidance documents on health claims and compensation schemes** respectively.

The first aims to address the growing use of the Internet by direct sellers, which requires additional efforts to ensure compliance on European health claim legislation. The second aims to give an interpretation to the existing rules in the Code of Conduct, which would make compliance by companies easier and more transparent.

In April 2014, members of the Ethics Committee met with the **WFDSA Ethics Committee** to exchange views on the differences in the world on issues that the Ethics Committee is currently working on, notably health claims and compensations schemes. The meeting proved to be valuable for both organisations.

Objectives 2013-2014

• Ethics Committee

- Promotion of Code Administrator website and online complaints form;
- Finalising and promotion of Guidance document on Health Claims;
- Finalising and promotion of Guidance document on Compensation Schemes;
- Assisting DSAs on complying with the new European Directive on Alternative Dispute Resolution;
- Cooperation with WFDSA on possible amendments to the World Code of Ethics.

• B2C Code Administrator

- Promotion of the new complaints website and online complaint procedure.
 - Towards consumer organisations
 - Towards European and, if needed national authorities
 - Towards stakeholders
 - Towards industry
- Handling first complaints following the new platform.



Communications

The communications programme aims to promote direct selling and the Association's work by addressing both internal and external audiences. Internal communications aim to inform members about key regulatory and political developments affecting the industry and external communications aim to inform policymakers, media and other interested parties about direct selling.

Actions 2013-2014

As part of a renewed **external relations communication strategy**, Seldia regularly organizes events in collaboration with the EU institutions in order to raise the association's visibility in the EU capital and to highlight important topics related to the EU single market or the need for promoting women entrepreneurship.

- On 25 September 2013 Seldia together with MEP Teresa Jimenez (Spain, EPP) organized a high level lunch debate in the European Parliament on the promotion of Women Entrepreneurship. Keynote speaker Vice President of the European Commission Viviane Reding joined Seldia for the second time in 2013 to support the promotion of women entrepreneurship. The event attracted 120

participants, amongst them a record number of over 13 Members of the European Parliament from different political groups and countries.

- On 20 March 2014 Seldia organised a lunch debate in the European Parliament hosted by MEP Paul Ruebig (EPP, Austria) on the topic of women entrepreneurship and entrepreneurship education. The event was attended by several MEPs and included speakers from the EU institutions as well as WfDSA Executive Director Tamuna Gabilaia representing the direct selling industry.
- In 2013-2014 Seldia regularly met policymakers in Brussels and Members of the European Parliament in both Brussels and Strasbourg.
- Seldia participated and attended several annual DSAs events in Europe as well as the US conference and also visited local policymakers in preparation of the Greek and Italian EU Council Presidencies.
- Seldia's external relations include continuous cooperation with the World Federation of Direct Selling Associations (WfDSA), participating in its Global Regulatory, Association Service and Global Research Committees as well as collaboration on the collection of statistics. Seldia is also an active member of the Internal Market, the Supply Chain and the International Trade Committees of EuroCommerce, the EU retail federation.

- With the beginning of the new EU Parliament term in July 2014, Seldia presented its new website and a Direct Selling Guide aimed at educating the new EU policymakers.

Internal Actions 2013-2014

The Internal communication of the association is made up of the regular committee meetings with subsequent international and national follow-up actions, monthly newsletters, memos and other tools to regularly keep Seldia members up to date.

Objectives 2013-2014

The **internal communications** strategy envisages a new strategy to supporting certain Member DSAs in their lobbying approach towards policymakers and media, particularly in countries that currently face barriers to direct selling.

Externally, Seldia will continue to organize extensive meeting programmes with EU officials both in Brussels and Strasbourg and will look to organize further events in the EU institutions.

3rd Annual Round Table on the Future of Direct Selling

Brussels, 2nd of October 2013

With an excellent turnout of over 150 participants attending, the third edition of Seldia's Annual Round Table on the Future of Direct Selling took place in Brussels on 2nd of October 2013 and met an increasing success.

The morning session was dedicated to guest speakers and panels whilst the afternoon programme featured three workshops covering subjects of interest to the industry and to association professionals. Amongst the speakers, Seldia Chairman and CEO of Oriflame Magnus Brännström underlined the fact that direct selling was one of the few sectors in Europe that was continuously growing and that it was important to both recognize and further promote direct selling as being "a major force in Europe". Other speakers included Christian Verschueren, Director General of EuroCommerce, the European association for retail, wholesale and international trade, Alessandro Carlucci, WFDSA Chairman and CEO of Natura Cosmetics, Jens Abend, of LR Health & Beauty Systems, Ben Woodward, of Nikken, Peter Strydom of Amway and Tamuna Gabilaia, of WFDSA. All of them gave captivating keynote speeches much appreciated by the audience.

The conference ended with the successful presentation by leading consumer and shopper behavior specialist Ken Hughes.

The 4th edition of Seldia's annual conference will take place in Brussels on 2nd of October 2014.

Seldia "Astra Awards" of the Year

The Seldia Annual Awards aim at honoring each year the member association and the member company that have made the best achievement in raising awareness of the direct selling method of distribution, promoting its socio-economic benefits and highlighting the advantages to consumers during the past year.

In 2013, Seldia honored the Hellenic Direct Selling Association for its successful efforts to promote direct selling in Greece despite the severe economic crisis the country faced, and Amway for its involvement in promoting women entrepreneurship through various programs and studies. Moreover Seldia also bestowed two special Awards: a Hall of Fame Award to Jonas and Robert af Jochnick, legendary founders of the company Oriflame, and a Honorary Award to MEP Malgorzata Handzlik.



2013 ANNUAL
Round Table
On the Future of Direct Selling

Brussels, Belgium
2nd October 2013





Socio Economic Report 2013-2014

70%

of direct selling is person-to-person

EU sales

Up 4%

Cosmetics

Represent 36% of total sales

Introduction

The general economic outlook has improved in the last year, although we have to remain cautious about the future. The various political conflicts in both Europe and outside bare the risk of effecting direct sales directly or the economy in general.

Nevertheless, the good news is that direct sales in Europe have grown for the 5th consecutive year, since we issue our statistics by improved methodology. Total European Union sales in 2013 was up by 4%, from €18 bn¹ in 2012 to € 18,7 in 2013. Although none of the European markets have shown double digit growth, some markets have impressed anyway: Netherlands tops growth with +8%, followed by the UK with 6.7%, while Bulgaria, Belgium and the Baltic countries each show growth of more than 5%. The large markets do well, with France, Germany and Poland over 4%

growth. Italy shows signs of recovery with a small growth, while the economic hardship in Spain has led to a worrying decline in sales of 4%.

In neighbouring countries, both Russia and Turkey continue their growth, while the Ukraine sales have declined already in 2013, obviously affected by the political crisis. These figures are published in the annual statistics compiled by Seldia and the World Federation of Direct Selling Organisations (WFDSA).

Seldia and WFDSA continue their quality improvement programme to make the annual statistics even more reliable and consistent. The improved statistics will allow us over time to make detailed comparisons between different years and to identify trends. In this report, you will find only the detailed 2013 statistics.

¹ 2012 restated figure

Forms of Direct Selling

The 2013 statistics make the distinction between person-to-person and party-plan selling methods. Both selling methods can be done through single-level and multilevel marketing, for which there are no detailed statistics available at European level.

The share of direct selling through person-to-person is 70%

The EU average shows that around 65% of direct selling is done through person-to-person sales and 35% through party-plan, but there are great deviations from the average. Among the large EU markets, party-plan selling seems particularly popular in France and Germany. In most Central and Eastern European countries, person-to-person sales are dominant, including in neighbouring countries like Russia, Ukraine and Turkey.

The Direct Sales Representatives

Over 5.1 million people involved in direct selling in the EU

Over 5.1 million people in the European Union are involved in direct selling, while less than 20,000 people are employees of Direct Selling companies. In other words,

the majority of the people involved in the direct selling sector are independent entrepreneurs. This does not exclude the possibility that these entrepreneurs have other forms of income elsewhere, including as employee.

The self-employed status is in most cases the logical consequence of the distribution model. It attracts those individuals, who have a drive and ambition to start a business or earn extra income without necessarily having to make much initial investment.

The fact that direct selling attracts many people with another main activity is illustrated by the fact that roughly 3/4th of the direct sellers in the EU do this on a part-time basis. The part-time employed can have different motivations: - the need for extra income at the end of the month to increase the living standard for them or their family; - the choice not to take full employment for family reasons or; - the social contacts that direct selling generates.

Direct selling is also accepted as a serious alternative for those who cannot find a full time job. In those cases, it allows him or her to develop professional skills and a job profile in general, which will improve his/her, chances to find full-time employment.

78% of direct sellers are women

The ability to combine a professional activity and extra income with a family responsibility is one of the reasons

why 78% of the direct sellers are women. The other reason is the suitability of cosmetics and personal care items for direct sales. In any case, direct selling allows women a participation in economic life and an independence that would otherwise have been more difficult.

The social security and tax status of the direct seller is not provided for at European Union level. In other words, it depends on each individual Member State how the direct seller has to pay taxes and social contributions and what the associated rights are on issues like health care, pensions, unemployment benefits, etc.

The turnover of a direct seller is in general relatively small, but can be important in some cases. The average turnover of a part-time direct seller in the EU fluctuates per country, depending on the economics and buying power in individual member states.

Low entry barriers encourage people to become direct seller

The part-time status and the low turnover normally allow the direct seller a simplified business regime in terms of registration, administration and bookkeeping. Indeed, the low-entry barriers are one of the key reasons why someone takes the step and becomes a direct seller. Many of those would otherwise not generate any income.

However, we notice a trend among member states to get closer involved in the business of the direct seller. One

of the main reasons for that is without doubt to increase tax revenues. Governments are also looking at other social aspects, like the level of social contributions and benefits.

Ethics

The direct selling distribution model promotes entrepreneurship because of its inherent ability to create sales with relatively low investment and its independence from existing distribution channels. The particular nature of direct selling also demands for a dedicated set of rules on proper and ethical trading. For this reason, both national governments and the European legislator have created specific rules and regulations for direct selling.

Direct Selling needs to comply with laws and strict ethical standards

In addition to obeying to the law, direct selling companies, direct sellers and consumers will also have to trade according to voluntary codes of good conduct or ethics, which aim to provide the consumer with even higher levels of protection. The World Federation of Direct Selling Associations has issued a model code that is the basis of the national codes around the world. Most Direct Selling Associations in the EU have tailored this code to the needs

and legal requirements of their country. Seldia has also adopted the world code as the basis for its European code.

The Seldia code covers both transactions with consumers as well as between economic operators (seller, company). The first addresses issues like the requirements for order forms, the provision of information to consumers, return of goods, proper promotion of products and services and others. The second addresses issues like recruitment practices, earnings projections, fees, buy back provisions and others.

Direct Selling is among first sectors with a European mediator

Seldia has adopted a Code of Ethics and has appointed a European mediator for disputes. This mediator accepts complaints from both consumers and stakeholders in cases where the national Codes in the EU would not provide an answer, for example because a company is not member of the national DSA.

The continuous growth of the sector cannot exist without consumer confidence. However, the sector has to remain vigilant against those who try to make rapid gains through illegal or unethical methods.

The Market

• Markets in Europe

As mentioned above, the top markets by in the European Union by turnover are Germany (€6.4 B), France (€4.0 Billion), UK (€2.5B) and Italy (€2,3B). There is some disparity between figures because they do not always include the same products and services in each country.

Stable growth in mature markets

In the last two decades, direct selling has grown rapidly in Central and Eastern European countries. The poor existing distribution infrastructure and the desire by individuals to increase living standards have been decisive factors for growth in this part of Europe. Although the majority of these markets is still growing, the growth is no longer significantly higher than in the other parts of Europe.

• Products & Services

Some products and services are particularly suitable for direct selling. For example, many customers prefer an explanation or demonstration of products like cosmetics, kitchen utensils, home improvement products or dietary supplements to name just a few. In other cases, retail stores are located far away and it becomes more convenient to buy from a local direct seller. The ability

to distribute products or services without a physical location makes direct selling the preferred option in remote regions. In addition to the various economic arguments, an important strength of direct selling, in particular party-plan selling is the pleasure it offer in socialising.

Over a third of sales are cosmetics and personal care products

In view of the above, direct sales can be divided into five main categories. The largest percentage of sales are cosmetics and personal care items (36% of total), followed by wellness (20%), household goods (11%), home improvement (9%), clothing and accessories (7%) and others (17%). The big riser in the statistics is the wellness category, which is up by over 3% market share compared to 2012. This trend is believed to continue in 2015 and onwards. It is also interesting to note that the utilities sector takes 2% of market share.

• Trends

Some of the trends have already been mentioned above:

- stable growth in mature markets;
- focus on ethical trading;
- important market shares for cosmetics and household goods or;
- high participation of women.

Other trends cannot yet be identified due to the lack of consistent statistics over longer periods. However, one important trend can be identified without specific data and that is convergence of different distribution channels.

Internet

Every economic sector has been changed due to the rapid developing technology, in particular the internet. It has had an impact in relations between direct seller and the direct selling company and between the direct seller and the consumer.

The Internet allows direct sellers to handle their orders online, which prevents much paperwork, speeds up the distribution process and saves costs.

The internet has allowed direct sellers and customers to maintain contact outside the face-to-face meetings. Direct sellers have started blogs and social media pages and use electronic mailings, while customers have online access to product and services brochures. Some may even give follow-up orders by electronic means. However, despite this convergence of physical and electronic communications, the essential criteria for direct selling remain undisputedly the face-to-face relation and the demonstration of products and services out of business premises.

Vocational Training

Another trend is the further professionalization of the direct seller. This will be the result of the increased availability and promotion of vocational training possibilities. The Direct Selling Associations play an important role in this process by initiating the development of such training and providing the required know-how. The government should play another important role by providing support in terms of funding and regulation that encourages vocational training.

Internationalisation

Further growth of the sector will depend on cross-border trade and harmonisation of rules and regulations in the Internal Market.

Legislation is currently being prepared in the European Union that will considerably harmonise direct selling rules. It is expected to enter into force in the coming years and internationalisation of companies will be the result.

There are also great opportunities for European direct selling companies to grow in overseas markets in Asia, Africa and the Americas.

2013 direct selling statistics

Direct Selling is the largest provider of independent business opportunities in Europe.

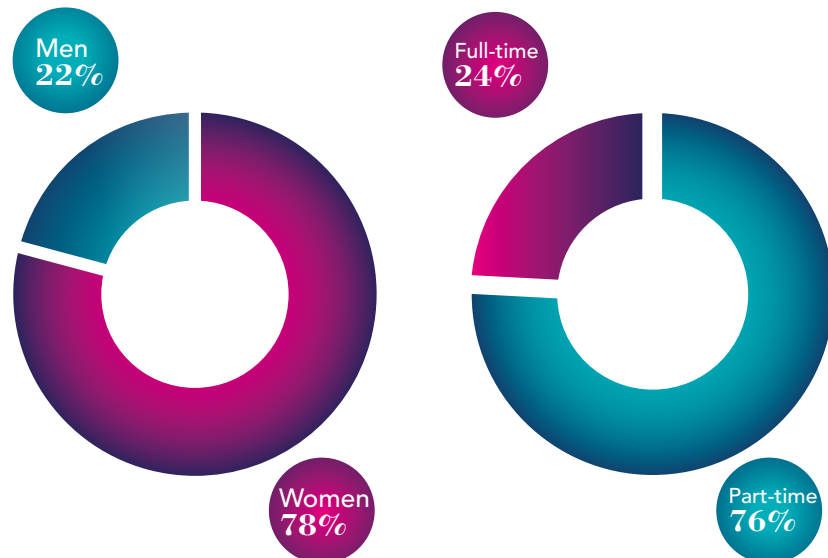
In European Union

5,1 million sellers
(78% are women)

In Europe

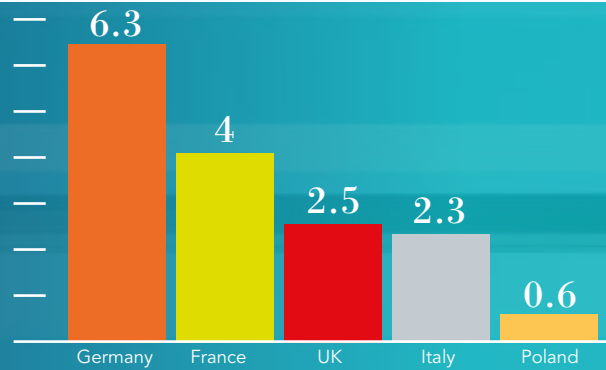
12,7 million sellers
(out of which 80% are women)

Profile of direct sellers in the EU



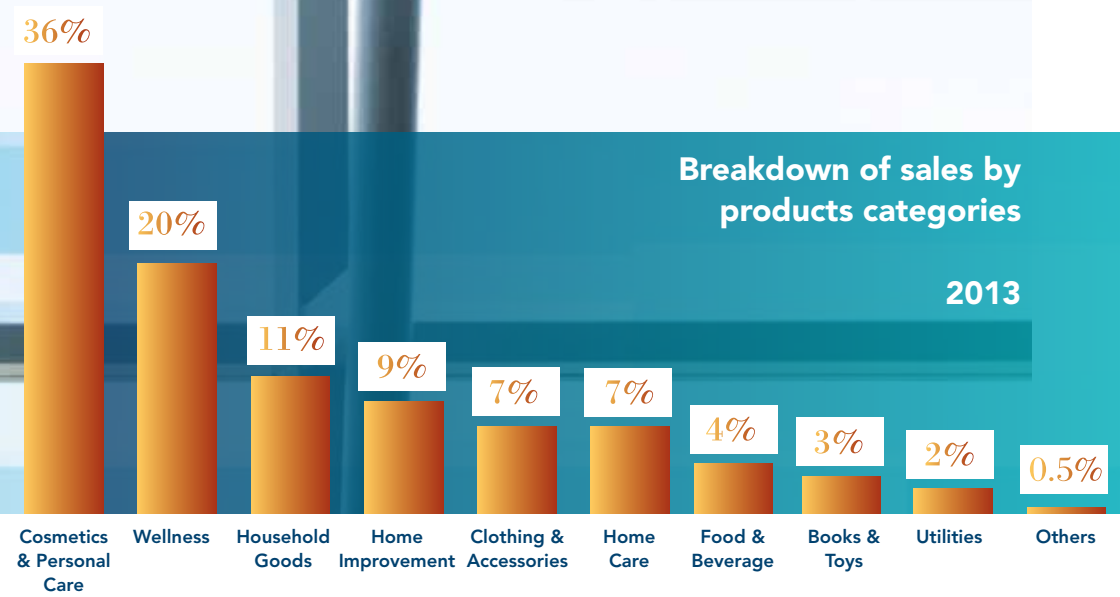
Top 5 EU markets in sales

In billion €, VAT excluded



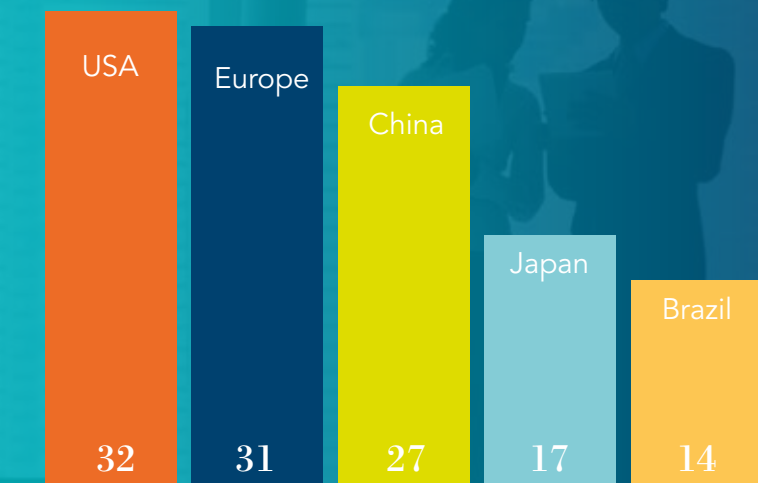
Breakdown of sales by products categories

2013



Top 5 markets in the world

In billion US\$, excl. VAT



Direct Selling in Europe

2013 Retail Sales

(in million € - VAT excl)

18.7 billion €

Total sales in the EU

23.7 billion €

Total sales in Europe

(1) Sales figures are expressed at estimated retail level excl. VAT and based on the size of the entire industry unless otherwise noted.

(2) Sales figures are expressed in constant euro to exclude impact of foreign exchange and ensure comparability. Exchange rates of European Central Bank as at 31 December 2013 were used to convert local currency to euro.

(3) Direct sellers are individuals who are career minded entrepreneurs building their own business, or part-time entrepreneurs earning extra income. All enjoy significant discounts on products. Some choose only to enjoy and use the products and not to sell at all.

(4) Figures based on DSA member companies and not the entire industry.

(5) WFDSA research estimate.

(6) The German DSA (Bundesverband Direktvertrieb Deutschland - BDD) commissions the University of Mannheim to conduct its annual statistic research. Final 2013 report will be published in August. Preliminary figures indicate the size of the German market at 14,6 billion €, including VAT, based on a broader definition of direct selling than that used by WFDSA. In 2014, BDD is not including the construction and finance/insurance sectors. For the sake of comparability, WFDSA has further excluded items such as VAT, energy and telecommunications sectors.

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na=not available

Countries	2013 Sales				2013 Nr of Direct Sellers ⁽⁵⁾		
	Local currency (millions)	EURO (millions)	% Sales change (YOY) in constant €		Nr	% women	% part-time
Austria ⁽⁴⁾⁽⁵⁾	182	182	0.0%	—	14728	na	na
Belgium ⁽⁴⁾⁽⁵⁾	140	140	5.0%	▲	18100	na	na
Bulgaria ⁽⁵⁾	121	62	5.5%	▲	117208	86%	84%
Croatia	202	26	-5.0%	▼	33630	95%	90%
Czech Rep ⁽⁴⁾⁽⁵⁾	5974	230	-2.1%	▼	246506	92%	88%
Denmark ⁽⁵⁾	330	44	-8.3%	▼	32830	na	na
Estonia ⁽⁴⁾	30	30	3.9%	▲	34388	90%	95%
Finland ⁽⁵⁾	180	180	1.0%	▲	79638	87%	90%
France	4000	4000	3.9%	▲	534672	82%	75%
Germany ⁽⁶⁾	6380	6380	4.2%	▲	376415	na	na
Greece ⁽⁴⁾⁽⁵⁾	123	123	-3.8%	▼	270331	81%	na
Hungary	56468	190	-5.4%	▼	473725	73%	na
Ireland	50	50	-5.7%	▼	21000	75%	na
Italy	2332	2332	1.2%	▲	521642	63%	na
Latvia ⁽⁴⁾	29	29	6.7%	▲	45563	90%	na
Lithuania	314	91	8.2%	▲	101358	90%	na
Luxembourg	42	42	0.0%	—	2700	95%	na
Netherlands	111	111	8.6%	▲	53057	75%	na
Poland	2775	661	4.7%	▲	900008	83%	na
Portugal ⁽⁴⁾	107	107	4.0%	▲	107900	na	na
Romania ⁽⁴⁾⁽⁵⁾	1068	242	2.3%	▲	292561	na	na
Slovakia ⁽⁴⁾⁽⁵⁾	110	110	1.0%	▲	145000	na	na
Slovenia	18	18	-8.0%	▼	23000	85%	na
Spain	608	608	-4.0%	▼	202008	70%	na
Sweden	2309	267	-2.6%	▼	112969	80%	na
UK	2134	2513	6.7%	▲	420000	75%	na
Total EU		18768			5180937	78%	
Norway ⁽⁵⁾	807	103	-1.0%	▼	99000	na	na
Russia	137936	3258	2.7%	▲	5042778	88%	na
Switzerland ⁽⁵⁾	413	335	-5.0%	▼	12250	na	na
Turkey ⁽⁵⁾	1337	528	2.5%	▲	863475	86%	na
Ukraine	5801	547	-4.8%	▼	1187836	87%	na
Others ⁽⁵⁾	341	258	2%	▲	341510	na	na
Total		23797			12727787	80%	

Seldia Members



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 Phone: +36 1 883 0456
 Fax: +36 1 883 0301
 Website: www.dsa.hu
 E-mail: office@dsa.hu


Latvian Direct Selling Association (LTTA)

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 Fax: +370 523 00158
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 E-mail: tta@tta.lv


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 Tel: +353 (0) 1457 7001
 Website: www.dsai.ie
 E-mail: Office@dsai.ie


Lithuanian Direct Selling Association (LTPA)

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 Fax: +370 5 273 00 51
 Website: www.ltpa.lt


Direct Selling Association of Italy (AVEDISCO)

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 (AVEDISCO)
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 Fax : +39 02 674 79 024
 Website: www.avedisco.it
 E-mail: avedisco@avedisco.it


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 Website: www.avd.lu
 E-mail: info@avd.lu


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 Website: www.direktesalgsforbundet.no
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 E-mail: konstantin.kulinitich@mkcorp.com



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Russia

Direct Selling Association of Russia (APP)

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E-mail: info@rdsa.ru



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Slovenia

Direct Selling Association of Slovenia (SDP)

Direct Selling Association of Slovenia C/O
Slovenian Chamber of Commerce TZS Trgovinska
zbornica Slovenije DSA - Sekcija za direktno
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E-mail: vdv@directeverkoop.nl



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Fax +90 212 671 29 36
Website: www.dsd.org.tr
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Corporate Members



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www.avon.com



www.captaintortuegroup.com



www.energetix.tv



www.herbalife.com



www.eu.kyani.net



HEALTH & BEAUTY
SYSTEMS

www.lrworld.de



www.marykay.com

www.morinda.com



www.nikken.eu



www.nlstar.com



www.nseurope.com



oriflame.com



www.partylite.com



www.pm-international.com

Services Provider Program

The Services Providers' Program is designed for companies which provide products and/or services to the direct selling industry and would like to offer their services to direct selling businesses in Europe.

Objectives

- Facilitate contacts and exchange of information between Seldia' Services Provider and direct selling companies entering one or more European markets;
- Develop a database of contacts amongst European suppliers of products/services to the direct selling industry;
- Increase Seldia's visibility by enlarging the scope of its services;

How it works

• Procedure

Companies interested to become Services Provider of Seldia will submit an application to Seldia.

“Thriving on projects where we learn from the people we’re working with”



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Meridian Deutschland

Meridian Deutschland GmbH & Co. KG is the largest direct selling consultancy in Europe. Based in the area of Frankfurt in Germany, it offers its services exclusively to direct selling companies. Its areas of expertise include executive search, sales and marketing strategies as well as merger and acquisition. Comprehensive insight, years of experience, international direct sales contacts and a wide European network of contacts are Meridian Deutschland's key features.

www.meridian-deutschland.com



Meridian Associates

Meridian Associates is a network of reputed consultants in direct selling and offers a large panel of services exclusively dedicated to the Direct Selling industry in Germany, UK, Spain, France and Italy.

www.meridian-associates.eu



Sidley Austin LLP

Sidley Austin LLP is one of the world's largest law firms, with approximately 1700 lawyers across 17 offices. Our lawyers provide a broad range of services to meet the needs of large and small businesses across a multitude of industries, including the direct selling sector, as well as financial institutions, governments and individuals around the globe. In Europe, Sidley is a leader in helping clients to navigate and shape EU rules, to structure complex commercial transactions, and to resolve cross-border disputes.

www.sidley.com



Jenkon In

Web based software solutions for direct selling and party plan companies with solutions that include sales force performance and compensation management, online sales tools and corporate back-office administration tools.

www.jenkon.com



What is Upline?

Alphatec GmbH – based in Munich, Germany – is the European market leader in software solutions for direct selling companies. The UPLINE suite was created as a comprehensive software package for companies who are looking for a cost-effective and flexible state-of-the-art software that grows with their demands. Since 1993 UPLINE is in very successful use at many companies of any size.

UPLINE has been designed as a modular system that can be customized and extended. Our team of experts in direct selling software continuously develops features and technical innovations for the benefit of our clients.

www.upline.de



Exence S.A.

Exence S.A. specializes in delivering comprehensive IT solutions to support operational activity and development of companies. Our bundled portfolio includes open source domain applications and IT systems based on technologies from the world's leading vendors. Exence offers applications for direct sales, which facilitate management of sales representatives teams. Those applications help companies organize sales process on stages from recruitment of new representative, getting some knowledge about products, adding his/hers clients orders, and calculation of commission and results of sales competitions.

www.exence.com



Hyväheimo AB

Hyväheimo AB helps Direct Selling companies to expand in Europe and to build positive corporate cultures. Full market opening services, events management, training and with a specialty in high performance coaching and career mentoring. Personal development is not only for the sales force - Hyväheimo can help to bring out the best in



direct selling managers at all levels and develop young, ambitious talent to really shine in your organisation.

www.hyvaheimo.com

DB Schenker

DB Schenker, a world leading provider of logistics services, has a specific focus on the direct selling industry. DB Schenker understands the specific needs of the industry and has customized EMEA & Russia wide solutions to manage your complete logistics operations. With warehouses throughout Europe, Russia, Ukraine, Turkey, Kenya and Nigeria, with existing direct selling business cases we offer:

- Warehousing services
- Fulfillment services
- Co-packing / manufacturing
- Parcel carrier management
- Local sourcing

www.logistics.dbschenker.nl/log-nl-nl/start/

www.dbschenker.com/ho-en/start.html



Euro Disney Business Solutions

Business Solutions, a team of experts dedicated to organizing all kinds of events at the unique site of Disneyland Paris. We are dedicated to monitoring professional events (conventions, conferences, seminars, product launches, exhibitions ...), gala evenings and privatization in our Theme Parks as well as motivational programs organized by our customers. Our job: design a unique and unforgettable event.

www.disneylandparis-business.com



Membership of Committees (active members)

The Executive Director is an ex-officio member of all Committees

Board of Directors (2013-2014)

Magnus Brännström	Chairman (Oriflame)
Miroslaw Lubon	Polish DSA
Anders Berglund	Swedish DSA
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Paul Southworth	UK DSA
Jacques Cosnefroy	French DSA
Arabelle Ferket	Dutch DSA
Agustin Roqué	Spanish DSA
Gintas Zaleckas	Baltic States DSAs

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Michaela Beltcheva	Oriflame
Amélie Baracat-Empereur	Herbalife
Anders Berglund	Swedish DSA
Danilo Ventajar	Kyani
Oliver Preeg	Morinda
Paul Dobson	UK DSA
Anne-Sophie Isler	French DSA
Paul Gagnier	ACN
Jaroslav Mulewicz	Avon
Noelia Souque Caldato	Avon
Anja Newberry	Nikken
Tamara Shokareva	Mary Kay/DSA of Russia
Armel Peillonex	PartyLite
Agustin Roqué	DSA of Spain
Laurent Servais	Nu Skin
Gintautas Zaleckas	Baltic States' DSAs
Michael Horn	LR Health & Beauty Systems

Companies' Committee

Jaroslav Mulewicz, Chairman	Avon
Noelia Souque Caldato	Avon
Michaela Beltcheva	Oriflame
Michael Meissner	Amway
Imelda Vital	Amway
Amélie Baracat-Empereur	Herbalife
Sindy Staessen	Herbalife
Paul Gagnier	ACN
Philippe Jacquelinet	Captain Tortue Group
Armel Peillonex	PartyLite
Tamara Shokareva	Mary Kay
Joris Vanden Berghe	Nu Skin
Michael Hoffmann	LR Health & Beauty Systems
Roland Förster	Energetix
Penny Farish	Morinda Bioactives
Danilo Ventajar	Kyani

Non-EU Member DSAs

Michaela Beltcheva, Chairwoman	Oriflame
Nadia Bedrychuk	DSA of Ukraine
Candan Corbacioglu	DSA of Turkey
Jan Frederik Torgersen	DSA of Norway
Tamara Shokareva	DSA of Russia
Konstantin Kulinitch	DSA of Kazakhstan
Amélie Baracat-Empereur	Herbalife
Jaroslav Mulewicz	Avon
Imelda Vital	Amway
Veronica Pont Verges	ACN
Laurent Servais	Nu Skin

Ethics Committee

Professor Jules Stuyck, Chairman	
Anders Berglund	Swedish DSA
Philippe Dailey	French DSA
Paul Southworth	UK DSA
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