

Promoting the benefits of direct selling

ANNUAL REPORT 2011-2012



The European
Direct Selling Association

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Chairman's Statement



Let me start with a double welcome. The first welcome is addressed to you. Welcome to this Annual Report in which I hope you will find interesting information on Seldia's activities, the industry and statistics. The second welcome goes to the two companies which have joined Seldia in 2012: LR Health & Beauty Systems and Energetix.

Both are dynamic German companies with a positive outlook at industry representation and we are proud to have them in our association.

If I had to pick one word to describe the last twelve months it would be "eventful". Eventful for economists and politicians, but certainly for Seldia as well. The Arab Spring, the global economic crisis and the Euro meltdown have each lead to rapidly alternating developments, of which we try to grasp the meaning for our business. For Seldia, it has been an eventful year simply because of the many events we organized.

"This has been a particularly eventful year for Seldia"

The Seldia events have been launched in order to give our Association and direct selling more visibility and recognition with European policy makers. Too often still, policymakers are not familiar with the working of our sector, a situation which can lead to adverse legislation. You can read further about the details of our events in the section "Communications" of this publication. Personally, I had the pleasure to attend a lunch meeting with European Commissioner for Justice Viviane Reding, allowing me to discuss with her plans to harmonize the rules for commercial contracts.

Our Executive Director Maurits Bruggink hosted two events in the European Parliament, which were well attended and we hope that we can count on some understanding and support in this institution in the future. Our program to create awareness in the European

Parliament will continue in the coming twelve months with further events for which we have already found support from various Members of the European Parliament. Each of these events will focus on the economic contribution of our sector and on (female) entrepreneurship.

“Seldia’s events will focus on the economic contribution of our sector and on female entrepreneurship”

in its organization and I am pleased to note that the next Annual Round Table is promising to be an even bigger experience. The 2nd edition will be held on 3 October 2012 in Italy, in cooperation with the Italian DSA who proves to be a resilient and valuable Seldia member.

One event that requires a reference in my opening statement is the Annual Meeting of the CEO Council. This body is important because it formulates the priorities of the association. This year’s edition was kindly hosted by Nu Skin in Copenhagen and focused largely on economic issues. The CEO’s drew the right line in calling for Seldia to focus on the promotion of the economic value of direct selling. We are known to be a counter-cyclic sector that performs well in periods of economic downturn. Policy-makers should be made aware of this and set the right conditions for us to prosper.

Seldia has already reacted to this call by organizing a large luncheon debate in the European Parliament on Female Entrepreneurship and more actions are planned for the coming twelve months.

In addition to our public policy actions, it is also worthwhile to point out our 1st Annual Round Table on the Future of Direct Selling, which was held in Poland in October 2011 in cooperation with the Polish DSA. This event was a success in many ways: attendance, organization and content. My congratulations to everyone involved

In addition to these actions, the advocacy on our “traditional” issues continued to develop under the leadership of the Committees’ Chairs whom I thank for their time and dedication. As a result of their hard work and together with the committees’ members, we have a strong advocacy for our industry on the issues that matter most to us: regulatory affairs, company affairs, ethics and relations with neighboring countries.

Let me finish with a single farewell. My term as Chairman comes to an end and I take this opportunity to thank all those who have accompanied me in the last two and a half years to change our association in what it has become today. I am proud of what has been achieved in such a short time. Seldia has become an efficient organization which represents our interests in a very good manner and gained the confidence of both association and corporate members. My only regret is that the entire European industry is not yet gathered under its umbrella. I hope that my successor will be successful in achieving this major goal.

As member of the Seldia CEO Council and as Vice Chairman of the French DSA, I will remain committed to support the development of our great sector. In my new capacity, I will also remain close to the further progresses of Seldia and look forward to working with its members on enhancing our representation with European policymakers.

I wish you and the next Chairman of Seldia much success in the coming year.

Philippe Jacquelinet
Chairman

“Thank you for your support and let us continue to work toward a Single Voice for the Direct Selling industry in Europe.”



The European
Direct Selling Association

Mission Statement

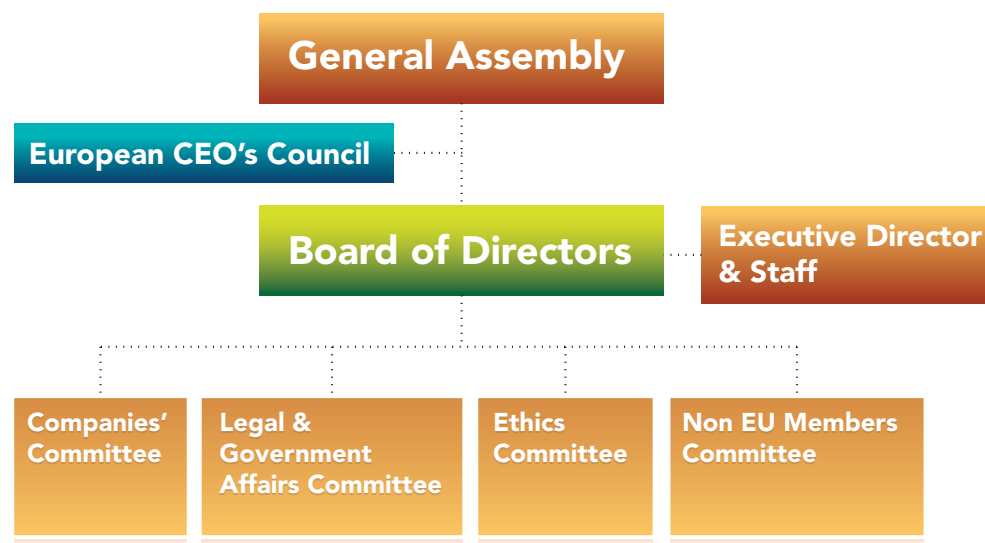
Seldia shall represent and promote,
at European level, the interests of national
Direct Selling Associations and of their
members engaged in direct selling.



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 & Annual Conference

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

Actions 2011-2012

The General Assembly meets once a year and takes all institutional decisions such as appointment of officers, approval of the annual budget and of the annual Action Plan of the association.

In 2011, the General Assembly held a meeting on 21st of September in Warsaw chaired by Philippe Jacquelinet. It approved the 2012 budget and 2012 Action Plan and reviewed Seldia's activities in relation to EU affairs.

Early 2012, the General Assembly accepted two new member companies: LR Health & Beauty Systems and Energetix, bringing the number of Seldia Corporate Members to 14.

The 2012 annual meeting of the General Assembly will be held in Milan on 3rd of October, in conjunction with Seldia's 2nd Annual Round Table on the Future of Direct Selling. The objectives set up in 2011 to create a new format for the General Assembly to be held together with a major annual conference has been achieved with the first Annual Round Table on the Future of Direct Selling organized in cooperation with the Polish DSA on 21st September 2011 in Warsaw, during the Polish Presidency of the EU.

Objectives 2012-2013

The October 2012 General Assembly will be a benchmark meeting as it will elect a new Chairman and a new Board of Directors for a two years' term.



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 per year. It is chaired by Seldia's Chairman.

Actions 2011-2012

The Board of Directors met three times in twelve months, in November 2011, February and June 2012.

The Board agreed on the organization of a second Annual Round Table and selected Milan for the location of the 2012 conference. Board members adopted a formal procedure for the attribution of the Seldia Awards to be bestowed on the occasion of the Annual Round Table.

The Board recommended the application of the companies LR Health & Beauty Systems and Energetix as Corporate Members to the approval of the General Assembly.

The Board of Directors oversaw the implementation of the Seldia 2011-2012 Action Plan and agreed

on the organization of two events in the European Parliament in the first part of 2012, on alternative dispute resolution and female entrepreneurship. It also supported the participation of Seldia Chairman Philippe Jacquelinet in a private lunch with EU Commissioner Viviane Reding co-organized with the American & European Community Association of which Seldia is a member.

In February 2012, the Board agreed on the recruitment of Daniel Gerber as new EU Legal Adviser to replace Noelia Souque-Caldato who left Seldia to follow new opportunities. Of Spanish and Swiss nationalities, Daniel holds a degree in European Studies from the University of Essex (UK), and a postgraduate degree in International and European Politics from the University of Edinburgh. His past experience in the European Parliament contributed to the success of two above-mentioned events in that EU institution.



Objectives 2012-2013

The renewed Board of Directors and new Seldia Chairman will ensure that Seldia is able to develop new communication approaches and continues its advocacy work to defend the interests of direct selling businesses throughout Europe, and in countries where the EU legislative model often inspires local legislation.

It will examine the potential application of new members and will decide on the lobbying strategies upon recommendations made by the Executive Director.

Activity Report

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 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 2011/2012

The LGA Committee monitored upcoming EU proposals that could affect the direct selling industry and actively followed legislative developments on collective redress, e-Commerce, food & supplements, cosmetics, as well as the European Commission proposals on Alternative Dispute Resolution, Common European Sales Law and Data Protection - which were all being discussed at the European Parliament in 2012. Potentially impacting Seldia's national member associations and corporate members, it is essential for the committee to track these regulatory issues and to develop appropriate responses accordingly.

In maintaining an own Alternative Dispute Resolution scheme in the form of "code-administrators" that enforce the international Direct Selling Code of Conduct in each member country, Seldia actively advocated on the EU's ADR proposal in the EU institutions, both through one-on-one meetings with politicians as well as by hosting events involving stakeholders from industry, the European Parliament and the European Commission. The LGA Committee also monitored the European Sales Law proposal which is expected to become an optional 2nd regime parallel to the Vienna convention. It informed members of developments and the potential impact that this legislation may have. The Committee also followed the Data Protection revision on which it conducted an

internal analysis to identify how members are affected in order to develop a uniform lobbying strategy.

The Consumer Rights Directive adopted in 2011 is still in the process of being transposed into national law. The LGA committee regularly monitors the process of transposition in each member country through surveys and correspondence with national authorities. Apart from consumer related policy, the committee also focused on Social and Employment issues such as measures promoting entrepreneurship in the EU as well as the LGA committee's own initiative to centralise information and to find ways to harmonise the status of independent direct sellers throughout the EU.

In 2011 and 2012, with a mission to increase the association's visibility in the EU institutions, Seldia met and introduced direct selling to numerous Members of the European Parliament (MEPs) in Brussels and in Strasbourg as well as Commission officials and members of Council Permanent Representations. Seldia increased its visibility through regular events such as breakfast and lunch debates with a focus on relevant EU policy issues. Seldia also reached out to other trade associations and worked closely together with the Internal Market Committee of EuroCommerce, the Brussels lobby for the retail, wholesale and international trade sectors in Europe.

Objectives 2012/2013

▪ 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 Ireland and Lithuania in preparation of the 2013 EU Council presidencies and meet with stakeholders from government, consumers, business and trade.

▪ Implementation of the Consumer Rights Directive

The LGA Committee continues to closely monitor the implementation and transposition in national legislation in order to avoid negative provisions in National laws affecting the direct selling distribution model.

▪ Alternative Dispute Resolution / Collective Redress

The LGA committee will actively participate in the Trialogue negotiations on the European Commission's proposal for a directive on ADR and actively monitor developments on possible collective redress proposals.

▪ European Sales Law & Data Protection

The Committee will continue monitoring developments on the European Sales law initiative and the Data Protection revision. For both proposals Seldia will engage in extensive meeting programmes to inform the EU institutions on the industry position consolidated with its members within the LGA committee.

▪ Female Entrepreneurship

Seldia and the LGA committee will organize one major event in the European Parliament early 2013 to promote Female Entrepreneurship and the socio-economic benefits of direct selling with a focus on women entrepreneurs.

▪ Harmonisation of status for direct sellers

The LGA will define criteria towards harmonisation of status of direct sellers.

▪ Increased visibility among European Institutions

Seldia will continue to pursue and implement its campaign for more visibility and credibility for Direct Selling through events and media strategies.



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 co-operation 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 2011/2012

The Companies' Committee initiated a comparative study conducted with corporate members to analyse the diverse national provisions on Direct Selling that represent barriers to trade. As a result, the Companies' Committee filed a complaint to the European Commission on Austrian national legislation prohibiting the marketing of cosmetics through direct selling. The European Commission has started proceeding against Austria and the Committee will continue to put pressure on the regulators to do away with the unlawful restrictions.

The Companies' Committee developed a position paper on the economic benefits of direct selling, which describes the sector, highlights its economic importance and educates governments. It underlines in particular the independent, entrepreneurial role of direct sellers. This paper will be submitted to the relevant European institutions with the aim of getting formal endorsement. It will also be made available for national DSAs to advocate direct selling to national authorities.

The Committee cooperated with the Legal & Government Affairs Committee in reviewing specific regulatory issues and shared information on these matters in view of developing appropriate lobby campaigns.

A matter of particular interest to companies is the proposed new legislation on data protection. The Committee actively followed this issue, met with relevant officials at the institutions and has developed an industry position paper. It will continue to advocate the industry position during the adoption of the proposal in the coming twelve months.

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

The Companies' Committee has also taken up a role in the promotion of the industry vis-à-vis the EU institutions by discussing and planning the association's activities surrounding entrepreneurship and more specifically women entrepreneurship. The Committee is involved in the preparation of a major event which will take place in the European Parliament early 2013.

Objectives 2012/2013

▪ Abolition of remaining trade barriers

Seldia will continue to pursue its efforts to succeed in the complaint against the Austrian ban to distribute cosmetics via direct selling. The Committee will identify further cases in national legislation hampering direct selling and tackle these accordingly.

▪ Tackling taxation issues

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

▪ Promoting guiding principles on the status of direct sellers

The Committee in cooperation with the LGA Committee will advocate European Institutions as well as Member States to respect certain principles for our sector, in particular those that recognise the independent, entrepreneurial role of direct sellers.

▪ Defining of lobby campaigns on EU key regulatory issues

The Committee will be instrumental in identifying clear cut lobby strategies in defense of the industry vis-à-vis upcoming EU legislation. Of particular relevance in the coming twelve months will be the adoption of a EU directive on Data Protection.

▪ Female Entrepreneurship and visibility among European Institutions

The Committee will support the organisation of a major event in the European Parliament in early 2013 to promote Female Entrepreneurship and the socio-economic benefits of direct selling with a focus on women entrepreneurs.



Non-EU DSAs Members' Committee



Michaela Beltcheva, Vice President Government and Legal Affairs at Oriflame, chairs the Committee

The objectives of the Non-EU DSA's Members' Committee (NED) are to promote the interests of Direct Selling and Direct Selling Associations in European Union neighbouring countries, to support efforts of Non-EU DSA members in their advocacy towards national authorities 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.

The Committees' members are the representatives of the non-EU DSAs, namely Russia, Ukraine, Turkey, Croatia and Norway, as well as representatives of Member Companies with interests in these countries. The committee meets twice per year and conference calls are scheduled on short notice to react to major developments. Michaela Beltcheva, Vice President Government and Legal Affairs at Oriflame, chairs the Committee.

Actions 2011/2012

Initially created in 2010 to support non EU-DSA members of Seldia in their advocacy towards national authorities, the Committee has evolved to support advocacy affecting direct selling companies in other parts of the world. In 2011/2012, Seldia supported the global industry campaign for better regulation in India. In particular, Seldia met with European Commission officials and received a letter of support by European Trade Commissioner Karel De Gucht.

The NED Committee supported the industry in Ukraine with letters to government and position papers in view of a possible revision of legislation affecting the status and taxation of direct sellers. This matter has been ongoing for several years and is likely to require further attention.

Another aim of the NED Committee is to exchange information and coordinate action in third markets. An example of this is Kazakhstan, an important emerging market for many Seldia member companies. Other countries monitored by the NED Committee include Turkey, Croatia and Moldova.

In cases where individual companies have an issue with authorities, for example customs authorities, Seldia intervened with written submissions on general EU interpretations related to direct selling. These submissions have helped the companies involved to convince national authorities to take the right decisions.

Seldia became member of the EuroCommerce Trade Committee. EuroCommerce is the umbrella organisation of distribution sector and a powerful lobby in Brussels. Seldia provided input in various EuroCommerce position papers, like those on trade relations with Kazakhstan and Moldova. Our membership also proved to be a useful way in obtaining much insight in the on-going trade negotiations between the European Union and third countries.



Objectives 2012-2013

▪ **Assisting Non-EU DSAs**

The NED Committee will continue to assist non-EU DSAs in tackling domestic 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.

▪ **Support for DSAs in EU accession process**

The NED Committee will assist DSAs of countries that are preparing for EU accession in interpreting and adapting to relevant EU legislation. They include the Croatian DSA and the Turkish DSA.

▪ **Monitoring and establishment of new DSAs**

The NED Committee will assist in conjunction with companies' interests in setting up new associations in countries in which there is activity but no DSA yet established. The focus is on the Balkan and North Africa. Seldia will work closely with the WFDSA where it can either assist WFDSA in handling these regions or can enlarge the Seldia area with markets in geographical proximity.

▪ **Improving regulation in third countries, like Kazakhstan, Turkey and India**

The NED Committee will support Direct Selling Companies and DSAs in these countries to in order to prevent any legislation which could hinder the development of direct selling.

▪ **Improving trade in Russia and Ukraine**

The NED 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.

▪ **International Cooperation**

The NED Committee will support both the WFDSA Global Regulatory Affairs Committee and the EuroCommerce Trade Committee in their advocacy on behalf of our industry.

▪ **Creation database**

The NED Committee will create a database for identifying volume and business activity in European countries outside the EU.



Activity Report

Ethics' 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 Professor Jules Stuyck, of the University of Leuven, and five members.

Actions 2011/2012

The Ethics' Committee met four times during the last 12 months and held various conference calls in between meetings.

The Ethics' Committee closely followed the discussions on a proposal for an EU Directive on Alternative Dispute Resolution, which would have a direct impact on the functioning of our Code of Ethics and Code Administrators. It came to the conclusion that the EU would seek in any case a larger consumer involvement in ADR schemes and the Ethics' Committee therefore started discussions on how to achieve this in our sector. An outcome is expected in the coming twelve months, when the EU Directive is adopted.

The Committee produced a brochure with do's and don'ts in direct selling according to our code of ethics, which was made available online to members. The Committee also produced a revised "Glossary of Terms", which was also put online.

The Committee gave input to the revision of the Code of Conduct on Direct Selling by the International Chamber of Commerce. This work will continue in the coming twelve months.

The Committee provided advices on issues related to companies' practices. In two cases, it contributed to

a constructive process towards applying improved business practices.

In February 2012, Seldia co-organised a well-attended conference on Alternative Dispute Resolution, at which the Chairman of the Ethics' Committee spoke and moderated a panel. In May, Seldia organised a luncheon debate in the European Parliament on Alternative Dispute Resolution, where the direct selling sector demonstrated its track record on handling consumer disputes.

Objectives 2012/2013

▪ Promotion

The Committee will continue to promote the Code of Ethics among Seldia members and stakeholders in general.

▪ Complaints

The Committee will deal with any complaint for which it is asked to deal with and for which it has competence according to the Code.

▪ Complaint handling procedures

The Committee intends to develop a revised European code administration system that would allow some sort of consumer involvement.



Seldia promotes
**highest
standards**
in business and
ethical trading.

Communications

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

Actions 2011/2012

As part of a renewed external relations communication strategy, Seldia organized several conferences and debates in cooperation with the EU institutions as well as with other trade associations in order to raise the association's and the industry's visibility in the EU capital. The events focused on specific EU related issues and regulatory developments that are of importance to the industry:

- On 15 December 2011, Seldia hosted a lunch with Commission Vice-President Viviane Reding to discuss the proposed European regulation for a pan-European contract law. (bottom right photo, Seldia Chairman Philippe Jaquelinet, Commissioner Viviane Reding, Amway's Vice President Corporate Affairs Europe Michael Meissner)
- On 6 March 2012 Seldia together with EMOTA (the European Multi-channel and Online Trade Association) hosted the European Single Market Forum 2012 with Viviane Reding as keynote speaker. (photo bottom left)
- On 8 May 2012 Seldia partnered with EuroCommerce to organize a breakfast discussion in the European Parliament on the topic of "Alternative and Online Dispute Resolution". The event was hosted by MEPs Roza Thun and Othmar Karas and also attended by MEPs Andreas Schwab and Heide Ruehle. (photos: center and top right)
- On 12 July 2012 Seldia organized together with MEP Barbara Matera a lunch debate in the European Parliament on the topic of "Female Entrepreneurship". MEPs Malgorzata Handzlik, Lidia Geringer de Oedenberg and Teresa Jimenez also participated. (photos: top left, top middle and middle bottom).

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 Sub-Committees as well as collaborating on the collection of statistics.

Seldia attended several annual DSAs events in Europe and in the US and actively participated in the Internal Market, the Supply Chain and the International Trade Committees of EuroCommerce.

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 2012/2013

The external communications strategy envisages the organization of a major event in one of the European institutions and additional debates and conferences. Seldia will also continue its efforts in implementing a proactive media strategy.

Internally, Seldia will continue its members' outreach by providing all the above mentioned activities.



Activity Report



2011 ANNUAL **Round Table** On the Future of Direct Selling

Warsaw, Poland

The First Annual Round Table on the Future of Direct Selling Warsaw, 21 September 2011

Seldia held its first Annual Round Table on the Future of Direct Selling in Warsaw on 21st of September 2011, in conjunction with the General Assembly and other internal meetings and in cooperation with the Polish DSA. The Round Table aimed at debating the future of direct selling in the European Union and focused on the sector's contributions in meeting today's economic challenges.

Organized during the Polish EU Presidency, the event was a good opportunity to put direct selling under the spotlight and to raise awareness on the industry's opportunities. The conference was a great success and attracted a large audience of EU and Polish stakeholders, companies and DSAs leaders, consumers' associations, media and key actors of the industry. Guest speakers included MEPs Malgorzata Handzlik and Anna-Maria Corazza Bildt, the latter addressing the audience in a video message.

During the Gala Dinner that preceded the event, the first Seldia Annual Awards of Best Company and Best DSA were awarded respectively to Avon Cosmetics and to the Polish DSA.

The 2nd Annual Round Table on the Future of Direct Selling will take place in Milan on 3 October 2012.

2/3rd

of direct selling is
person-to-person

4.7 million

direct sellers
in the EU

Wellness products

growth to 14% market
share

Introduction

Despite recession and hard economic times all over the world, there is no decline in direct selling. Seldia and the World Federation of Direct Selling Associations (WFDSA) collected global figures indicating that the global sales volume increased by 9% in 2011. **Europe represents 16% of global sales** generated by 91 million direct sellers. In the European Union, total sales volume went up from 11,5 billion € in 2010 to 13,4 billion € in 2011.

Whilst beauty and personal care products remain the largest product category in the direct selling market, wellness products are steadily increasing their market share from 12% in 2010 to 14% in 2011.

You will find in the following pages a detailed report on European and global statistics.



25%

of direct sellers
were unemployed
before starting a
direct selling activity

84%

of direct sellers
are women

Introduction

The global economic crisis has little grip on direct selling, which continues to perform strongly. Statistics compiled by Seldia and the World Federation of Direct Selling Associations (WFDSA) show a growth in sales in the European Union of an astonishing 15.5 % in 2011. The total sales volume has increased from €11.5 to €13.4 billion. In 2009, total sales were a mere €10.7 billion, which illustrates the upward trend of the sector.

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.

Forms of Direct Selling

The 2011 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 70% of direct selling is done through person-to-person sales and 30% through party-plan, but there are great deviations from the

average. Among the large EU markets, party-plan selling seems particularly popular in France, Germany, Italy and Scandinavia. 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 4 ½ million direct sellers in the EU

Almost 4,7 million people in the European Union are direct sellers and 30,000 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.

Direct selling attracts many people who pursue another activity; this is illustrated by the fact that 70% 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 that will improve his or her chances to find full-time employment.

84% 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 almost 81% of the direct sellers in the EU are women. The other reason is the suitability of cosmetics and personal care items for direct sales. Direct selling allows women a participation in economic life and an independence that would otherwise have been more difficult to obtain.

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.

Low entry barriers encourage people to become direct sellers

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.

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 would otherwise not generate any income.

However, we notice a trend among member states to get more closely 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 generate sales with relatively low investment and its independence from existing distribution channels. The specific 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 the first sectors with a European mediator

Seldia 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 quick earnings through illegal or unethical methods.

The Market

• Markets in Europe

As mentioned beforehand, the top markets with the highest turnover in the European Union are France (€3.7 Billion), Germany (€2,8 B), Italy (€2,4B) and the UK (€1.4B). There is some disparity between figures because they do not always include the same products and services in each country.

Strong growth in Central and Eastern European markets

In the last two decades, direct selling has grown rapidly in Central and Eastern European countries. The newly developing distribution infrastructure and the desire

by individuals to increase living standards have been decisive factors for growth in this part 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 offers 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 household goods (22%), wellness (14%), home improvement (12%), clothing and accessories (5%) and others (12%).

• **Trends**

Some of the trends have already been mentioned above: - strong growth in Central and Eastern European markets;

- focus on ethical trading; - important market shares for cosmetics and household goods and; - 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

Rapidly developing new technologies, Internet in particular, have impacted on every economic sector, including direct selling. Internet changed relations between direct seller and the direct selling company and between the direct seller and the consumer and allowed 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 (DSAs) 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.

Harmonisation of rules

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

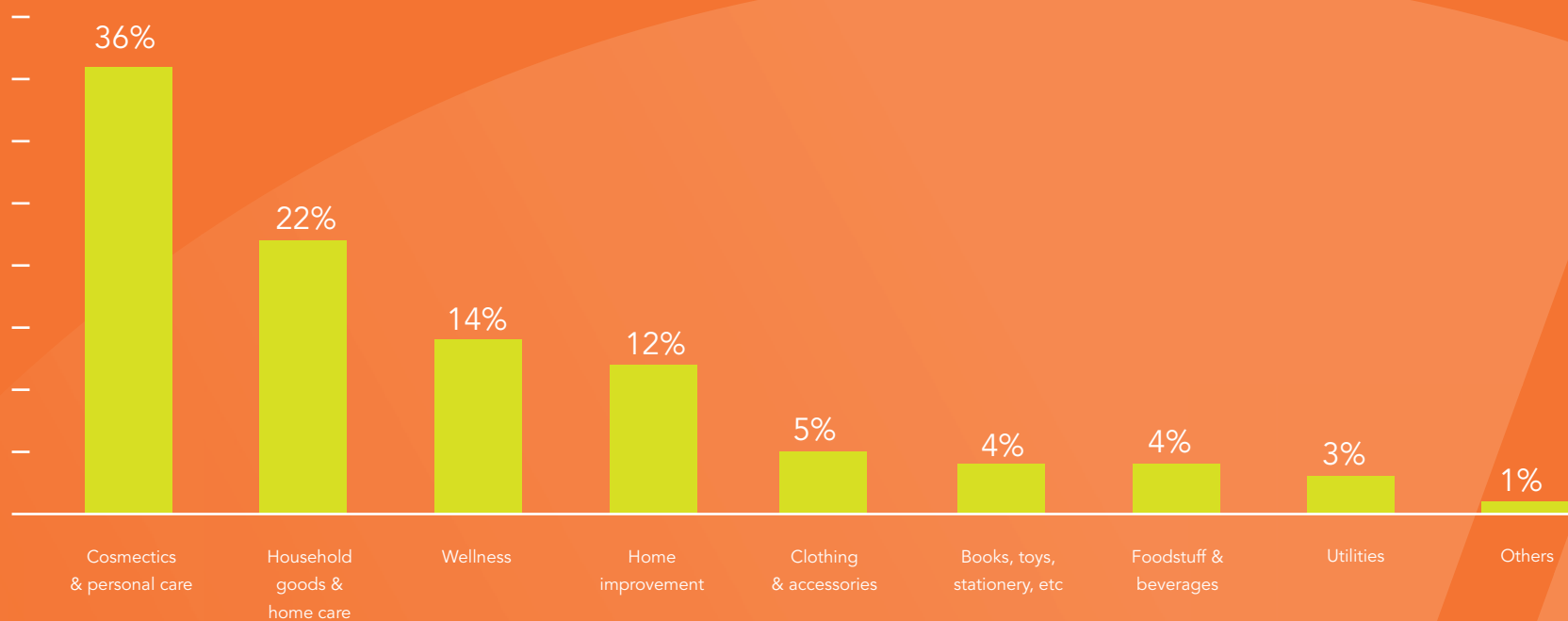
Legislation is currently being prepared in the European Union that will considerably harmonise direct selling rules. It is expected to enter into force in the coming years and internationalisation of companies will be the result.

Statistics

Introduction

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

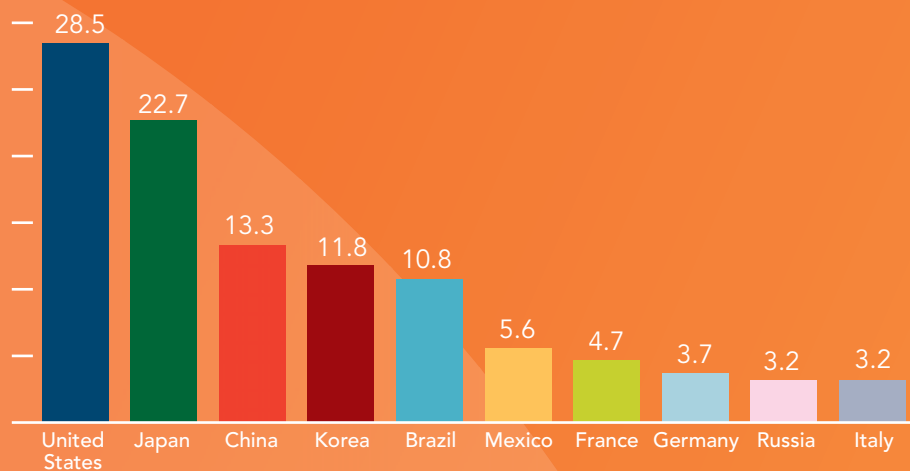
Sales per product categories (Europe)



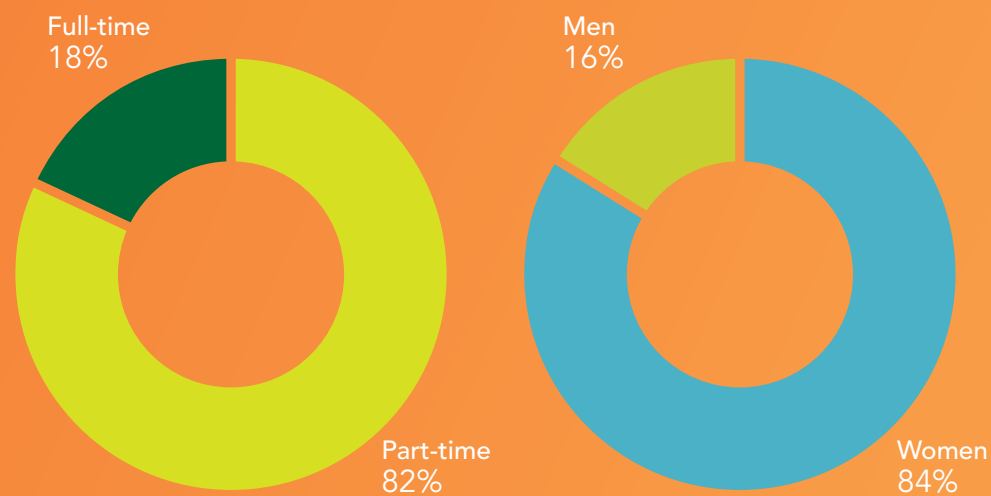
Top 5 Markets in the EU in billion/€



Top 10 markets in the world in billion/US\$



Profile of direct sellers



Direct Selling in Europe - 2011 Retail Sales (in million € - VAT excl)

Total sales in the EU :13,4 billion € - Total sales in Europe : 17,8 billion €

Countries	2011 Sales		2011 Nr of Direct Sellers ⁽⁵⁾			Nr. of employees in DS companies 2011	Selling methods		
	Local currency	€ (millions)	Nr	% women	% part-time		Person to Person	Party Plan	Other ⁽⁶⁾
Austria ⁽²⁾	188,00	188,00	na	na	na	na	na	na	na
Belgium	128,29	128,29	16576	67%	72%	800	8%	80%	12%
Bulgaria ⁽¹⁾	105,00	54,00	141588	85%(4)	80% (4)	152	91%	9%	0
Czech Rep	5870,00	238,70	243811	93%	98%	406	90%	10%	na
Denmark ⁽²⁾	328,00	44,00	69300	60%	93%	na	50%	50%	0
Estonia ⁽¹⁾	21,30	21,30	19600	90%	95%	106	95%	5%	0
Finland ⁽²⁾	165,00	165,00	76000	80%	92%	200	62%	36%	2%
France	3700,00	3700,00	480000	78%	80% (4)	4837	64%	36%	0
Germany	2695,00	2695,00	284906	80%	91%	3317	48%	52%	0
Greece ⁽¹⁾	136,00	136,00	262491	na	na	400	na	na	na
Hungary	41373,00	148,00	335879	67%	33%	528	68%	13%	19%
Ireland	50,00	50,00	20264	70%	79%	102	94%	6%	0
Italy	2422,00	2422,00	405894	76%	94%	1752	65%	35%	0
Latvia ⁽¹⁾	16,00	22,65	25500	95%	95%	73	90%	10%	0
Lithuania ⁽¹⁾	258,00	74,72	30300	90%	95%	125	98%	2%	0
Luxembourg	40,00	40,00	2615	na	na	na	na	na	na
Netherlands	99,00	99,00	43495	76%	90%	580	82%	18%	0
Poland	2412,00	585,35	870000	88%	60%	1497	96%	4%	0
Portugal ^(1,2)	121,00	121,00	104268	91%	90%	256	89%	11%	0
Romania	888,00	209,47	289621	82%	11%	497	97%	3%	0
Slovakia ⁽¹⁾	93,00	93,00	110130	94%	71%	173	75%	25%	0
Slovenia	17,00	17,00	26500	65%	80%	90	15%	85%	0
Spain	541,00	541,00	262455	85%	94%	1370	na	na	na
Sweden	2600,00	288,00	104000	75%	95%	320	60%	40%	0
UK	1176,00	1355,00	426600	76%	88%	na	72%	28%	0
Total EU		13436,48	4654817	81%	70%	17581	70%	30%	
Croatia	510,00	68,55	6550	60%	95%	60	80%	15%	5%
Norway	717,00	92,00	91261	80%	80%	na	85%	15%	0
Russia ⁽¹⁾	105448,00	2579,16	4077181	87%	86%	5263	85%	15%	0
Switzerland ⁽²⁾	431,00	349,66	12120	na	na	na	na	na	na
Turkey	1942,00	830,69	1190331	79%	na	836	98%	2%	0
Ukraine	4505,00	407,10	1354079	87%	97%	1639	90%	10%	0
Other ⁽²⁾	na	52,17	na	na	na	na	na	na	na
Total		17842,92	11374219	84%	82%	25379	70%	30%	

Note: figures are based on the entire industry(i.e. DSA member and non-member companies) unless otherwise noted. Sales figures are expressed at estimated retail level and exclude VAT. Annual average exchange rates for 2011 from the ECB were used to convert local currency to €.

(1) Figures are based only on DSA member companies

(2) Source: WFDSA research estimate

(3) Others:Andorra, Lichtenstein, Monaco, Malta, Iceland, Serbia (Source: WFDSA research estimate)

(4) 2010 data

(5) Direct sellers are career-minded entrepreneurs building their own business... or part-time entrepreneurs earning extra income. Through Direct Selling , they learn new skills, make new friends/contacts, gain greater self-esteem, and have the opportunity to give back to the community through the many social responsibility initiatives that Direct Selling companies undertake. Of this diverse group, many were customers of the products/services prior to becoming a company representative. As Direct Sellers, all enjoy significant discounts and in fact, some choose only to enjoy and use the discounted products and decide not to sell at all

(6) newspapers ads, flyers, brochures, internet, etc

(Source:WFDSA)

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Corporate Members



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www.nseurope.com



www.marykay.com



www.oriflame.com



www.nikken.eu



www.nlstar.com



www.partylite.com



www.stanhome.com



www.lrworld.de



www.energetix.tv

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”

Services Provider Program

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



Select Venue

A tailor-made and easy solution for the organization of your travel and events requirements. Free service for the organisation of your events. Select Venue will research, negotiate and present the ideal venue for your event according to your needs.

www.selectvenue.fr



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



Thomas Cook

Business Incentives

Thomas Cook Business Incentives

Thomas Cook Business Incentive organises unique incentive trips for corporate customers who want to motivate and pamper their employees.

On these holidays, which are entirely tailor-made, you and your guests can explore part of the world in a uniquely singular manner. You'll share intense, adrenaline-packed experiences with your staff that will make your incentive unforgettable.

Whether it's ice fishing, rafting, flying over the Grand Canyon in a helicopter or helping to build a school in Nepal, a Thomas Cook Business Incentive holiday is always a refreshingly original reward for employees or business relations who meet their sales or production targets.

www.tcbi.com

Membership of Committees (active members)

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

Board of Directors (2010-2012)

Philippe Jacquelinet, <i>Chairman</i>	(Captain Tortue Group)
Miroslaw Lubon	Polish DSA
Anders Berglund	Swedish DSA
Giorgio Giuliani	Italian DSA
Paul Southworth	UK DSA
Jacques Cosnefroy	French DSA
Arabelle Ferket	Dutch DSA
Juan Turró	Spanish DSA

Legal & Government Affairs Committee

Imelda Vital, <i>Chairwoman</i>	Amway
Ric Hobby	Herbalife
Patrick Ahern	Herbalife
Michaela Beltcheva	Oriflame
Paul Dobson	UK DSA
Yann Bédart	French DSA
Paul Gagnier	ACN
Jaroslav Mulewicz	Avon
Noelia Souque Caldato	Avon
Anja Newberry	Nikken
Tamara Shokareva	Mary Kay/DSA of Russia
Juan Turró	DSA of Spain
Patricia Van Oertzen	Nu Skin
Raymond Verbeurgt	NL International
Gintautas Zaleckas	Baltic States' DSAs

Companies' Committee

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Noelia Souque Caldato	Avon
Michaela Beltcheva	Oriflame
Imelda Vital	Amway
Ric Hobby	Herbalife
Sindy Staessen	Herbalife
François Failliot	Stanhomes World
Paul Gagnier	ACN
Anthony Chaplin	Nikken
Philippe Jacquelinet	Captain Tortue Group
Tomasz Stanislawski	PartyLite
Tamara Shokareva	Mary Kay
Joris Vanden Berghe	Nu Skin
Raymond Verbeurgt	NL International
Michael Hoffmann	LR Health & Beauty Systems
Roland Förster	Energetix

Non EU- Member DSAs

Michaela Beltcheva, <i>Chairwoman</i>	Oriflame
Nadia Bedrychuk	DSA of Ukraine
Candan Corbacioglu	DSA of Turkey
Heidi Kovak-Resnki	DSA of Croatia
Jan Frederik Torgersen	DSA of Norway
Tamara Shokareva	DSA of Russia
Sindy Staessen	Herbalife
Patrick Ahern	Herbalife

Jaroslav Mulewicz	Avon
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Patricia von Oertzen	Nu Skin

Ethics Committee

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