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Representing direct selling in Europe

ANNUAL REPORT 2014-2015



The European
Direct Selling Association

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Magnus Brännström
Chairman

“Entrepreneurship is the power behind the growth of direct selling, especially women entrepreneurship.”

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Chairman's Statement

Welcome to the 5th edition of Seldia's Annual Report, launched in conjunction with the 2015 European Direct Selling Conference. Readers not familiar with direct selling will find in this Report a wealth of information on a channel of distribution constantly growing and providing unique low cost independent business opportunities to each and every one, without any distinction of gender, age or education background. Other readers will find factual information on Seldia's activities over the last twelve months that focused on **advocacy**, promotion of **women entrepreneurship** and **ethics**.

On **advocacy**, Seldia has further developed its image building campaign in order to give direct selling the visibility and the recognition it deserves, making sure that our companies can maintain their growth in a favorable legislative environment. Meetings with EU policy makers, debates in the European Parliament and other events allowed Seldia to underline the potential of a channel of distribution that is unrivaled in empowering entrepreneurs, especially women, and to explain why direct selling has some

significant economic benefits. We have a great story to tell and, as an industry, we should be proud of being part of a sector offering affordable micro-business opportunities with little risk of failure or financial loss for anyone prepared to work hard. In the future, Seldia will continue this ongoing dialogue with the EU institutions. In addition to its EU advocacy actions, Seldia worked hand in hand with the WFDSA and the US DSA to support a formal recognition of direct selling in the Trade in Services Agreement (TiSA) and in the Transatlantic Trade and Investment Partnership (TTIP).

Entrepreneurship is the power behind the growth of direct selling, especially women entrepreneurship, and remains at the forefront of our activity. During the past months, Seldia became increasingly involved in the Women Entrepreneurship Platform (WEP¹), supporting its actions to encourage and enhance women's entrepreneurial spirit. With over 5 million people active in direct selling in the European Union,

“We have a great story to tell and we should be proud of being part of a sector offering affordable micro-business opportunities”

out of which 79% are women who predominantly work part-time, direct selling conveys a strong message to policy makers and demonstrates that there are solutions to job insecurities. We truly believe that entrepreneurship is the best way

to achieve economic, financial and social independence and is a step towards gender equality. Seldia and the WEP will keep on conveying these messages to ensure that women entrepreneurs

are offered the best possible conditions to develop and grow their business whatever the size of the business is.

Ethics in our businesses, ethics toward consumers, ethics toward our direct sellers, these are not empty words for us. In 1982, the direct selling industry was a pioneer in establishing self-regulations rules followed in 1995 by the launch of the European Codes of Conduct for Direct Selling. In 2014-2015, more than thirty years later and after several updates, we

¹ www.womenentrepreneurshipplatform.eu

consolidated our Codes of Conduct in order to make them compliant with new EU legislation and strengthen some of their provisions that go beyond legal requirements. The Seldia General Assembly will approve these revised Codes in its meeting of October 2015 and our member companies shall make sure that the Codes are enforced at each level of the business transactions.

28% of direct sales occur in a home party and companies using this selling approach are bedrock of our sector. It is therefore with great pleasure that Seldia welcomed earlier this year Stella & Dot, the well-known fashion jewelry party plan company as Seldia **Corporate Member**.

Thanks to new membership criterias Seldia is now in a position to offer broader membership conditions which will hopefully attract other companies willing to join forces with those already members to defend the interests of our

business model. In the past months, Seldia also welcomed several new **Service Provider member companies** providing products and or services to the direct selling industry.

How can we define our business model today? Where does direct selling stand in the digital world? What is the added value of being multi-channels? The future of the European Direct Selling industry will largely depend on its ability to adapt to and embrace the digital channel. Personally I believe herein lies a great opportunity for the industry, as networking and personal recommendation - activities that are truly the core of direct selling - are important activity drivers in the digital marketplace. These are also topics for **the 5th edition** of the **European Direct Selling Conference**, Seldia's annual event, which will take place in Brussels on 7th of October 2015 and gather high profile speakers and panelists to address these topics. This conference has become over the years the flagship annual event of the European direct selling in-

dustry, with more participants every year and a program which attracts companies, DSAs, other European trade associations and stakeholders interested to hear more about direct selling.

Together with the CEO Council whom I thank for its support I will remain committed to making Seldia stronger. I will also listen to the members' concerns which they had an opportunity to express in an internal audit performed a few months ago with the objective of improving the association's services. I would like to thank the Board of Directors, the Committees' chairs and members, as well as the Seldia staff for their ongoing dedication to make a better world for direct selling and to ensure that our businesses can flourish and grow in the most effective way, to the satisfaction of our clients and our direct sellers.

I wish you a lot of success in the coming year.

Magnus Brännström

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.

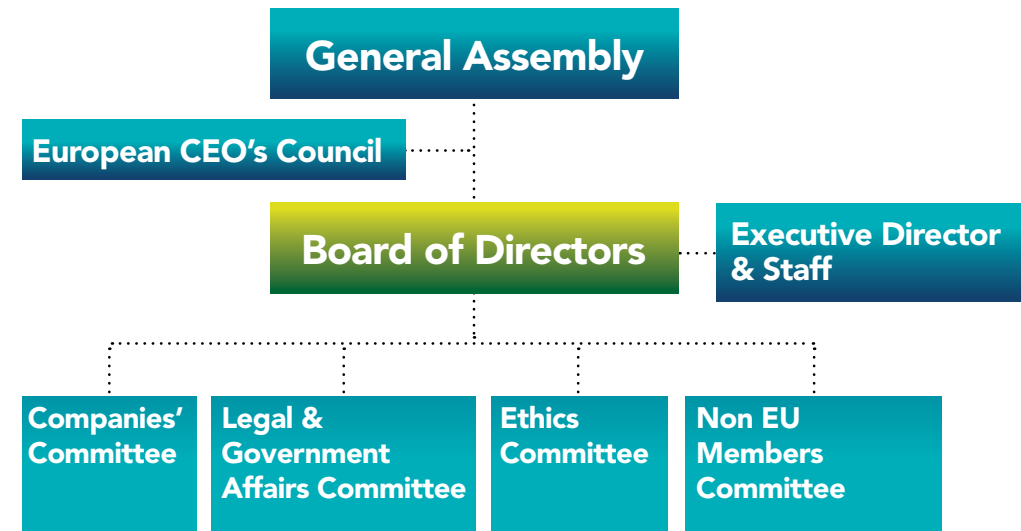
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The European Direct Selling Association

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



Monkey Business - Fotolia

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 the Seldia Chairman.

Actions 2014-2015

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 2014, the General Assembly met on 1st of October in an extraordinary meeting in order to approve amendment of the Articles introducing new corporate membership criteria. These new criteria aimed at reaching out to new direct selling companies operating in Europe since less than five



years. The regular meeting of the General Assembly took place on the same day and proceeded to the election of Magnus Brännström, CEO of Oriflame, for a second mandate as Seldia Chairman. Members also elected the Board of Directors for the term 2014-2016. In the same meeting, members approved amendments of the Articles in order to adjust them to the new membership criteria voted in the extraordinary meeting held previously, and voted in favor of changes in the Bye-Laws setting up new rules for calculation of DSAs' membership fees. Members also approved the 2015-2016 Action Plan and the 2015 operating budget submitted by the Board of Directors.

During the first semester of 2015, the General Assembly was consulted three times by written procedure and approved the 2014 accounts, amendments of the European Code of Ethic and the application of the company Stella & Dot as Seldia Corporate member.

Objectives 2015-2016

The General Assembly will meet on 6th of October 2015, in conjunction with the European Direct Selling Conference, Seldia's annual event. Amongst other decisions, it will consider important amendments of the European Code of Conduct proposed the Board of Directors and the Ethics Committee to comply with EU legislative changes and with new rules for alternative dispute resolutions mechanisms. The General Assembly will oversee any other recommendation put forward by the Board of Directors and the committees, and will ensure that Seldia maintains a high level of services to its members whilst achieving its objectives and fulfilling its Mission Statement.

The 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 2014-2015

In 2014, the Board of Directors met in October in conjunction with the European Direct Selling Conference, and held a conference call in December. In 2015, the Board met in March and in June, respectively in Munich and in Stockholm. The third meeting of 2015 will take place in October in Brussels again.

In October 2014, the Board reviewed and approved changes in the Seldia Articles and Bye-Laws that were recommended later to the General Assembly approval. It agreed on the 2015 operating budget and on the 2015

Action Plan which were then submitted to the approval of the General Assembly.

WFDSA Chairman Doug DeVos was the guest of the Board of Directors' meeting which took place in March, in Munich, in conjunction with the CEO Council meeting. In that meeting Board members reviewed the 2014 accounts which they recommended to the approval of the General Assembly, discussed internal issues and agreed on actions related to these issues.

The Board of Directors met again in June in Stockholm. It agreed to recommend the application of the company Stella & Dot as Corporate member to the approval of the General Assembly, and approved the application of

several new Service Provider members. Board members received a report on the implementation of the 2015 Action Plan and reviewed progresses of ongoing cases for which actions were decided.

Objectives 2015-2016

The Board of Directors will ensure that Seldia continues its advocacy work to defend the interests of direct selling businesses throughout Europe, and supports DSAs of countries where our business model is challenged. Moreover the Board of Directors will supervise the implementation of the 2015-2016 Action Plan and will take action whenever it is necessary to further develop Seldia's potential and increase its visibility.



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, e-commerce 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 2014-2015

The LGA Committee monitors upcoming EU proposals that could affect the direct selling industry and actively follows European Union legislative developments on important dossiers such as the Alternative Dispute Resolution

Directive, the Unfair Commercial Practices Directive, the Misleading and Comparative Advertisement Directive, the Consumer Rights Directive, regulation of e-commerce, Commercial Agents Directive, General Data Protection Regulation, as well as European Commission's strategies on the Digital Single Market and Internal Market.

During the second semester of 2014 Seldia was active in finalizing the adjustment of its consumer complaint mechanism to the provisions of the Alternative Dispute Resolution Directive which was due to be implemented in national legislation in July 2015. Together with its French partner, the French consumer association Léo Lagrange pour la Défense des Consommateurs, Seldia developed an online consumer complaint mechanism now available on www.fairselling.eu for which Seldia is seeking an official EU recognition.

The LGA Committee worked in cooperation with the Ethics Committee on the revision of the European Codes of Conduct to make them compliant with changes in the EU legislation and with technological evolutions. New texts and provisions were discussed and then later submitted to the approval of the General Assembly

Besides monitoring number of legislative dossiers, the LGA Committee also worked with EU officials and national

authorities in order to lift restrictions to direct selling that exist in some Member States and which are not compliant with EU legislation. One of such successful examples is the ban on direct sales of cosmetics in Austria which has been removed in April 2015, further to actions undertaken by Seldia towards the EU Commission and towards Austrian authorities. In that country, there still is a prohibition on direct sales of food supplements and the LGA Committee has developed actions aiming at the removal of that ban which is expected to be removed in a near future.

Under the leadership of the LGA Committee, Seldia had several meetings with the European Commission to advocate our industry's position in the framework of the Commission's projects on the revision of the Unfair Commercial Practices Directive Guidelines and the Misleading and Comparative Advertising Directive (MCAD).

Seldia is member of EuroCommerce, the European association representing retail and wholesale trade, and actively participated in the work of its Internal Market Committee, monitoring issues such as the committee also focused on Social and Employment issues such as measures promoting women entrepreneurship and monitored the EU Commission's actions on online sales practices. In June



2015 the Interest Group on Women Entrepreneurship has been established in the European Parliament in which Seldia acts as the main stakeholder organization.

Objectives 2015-2016

• 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 go to The Netherlands and to Slovakia in preparation of the 2016 EU Council presidencies and meet with relevant stakeholders from these two countries.

• Alternative Dispute Resolution

The LGA committee will be involved in the finalization of the recognition of the direct selling Code Administrator with the aim to have the platform of www.fairselling.eu fully recognized by the European Union in the upcoming year.

• Unfair Commercial Practices, Digital Single Market & Data Protection

The Committee will continue monitoring developments and giving input, if needed, on the Guidelines of the Unfair Commercial Practices Directive, the review of the Misleading and Comparative Advertisement Directive, Digital Single Market strategy and General Data Protection Regulation.

• National restrictions to direct selling

Seldia will continue to identify restrictions to direct selling that still exist in some Member States and that way will contribute to the European Internal Market strategy which is to be issued this year.

• Guidelines on Health Claims and Seldia Codes of Conduct

The committee intends to finalize the process of the adoption of Seldia Guidelines on Health Claims and Seldia Codes of Conduct.

• Enforcement of the EU Consumer Rights Law

The LGA committee will continue to closely monitor the correct application and enforcement of the EU consumer rights law into national legislation in order to avoid negative provisions affecting direct selling.

• Visibility among European Institutions

Seldia will pursue and implement its campaign aiming at more visibility and credibility for Direct Selling in the EU institutions through events and other communication actions. The LGA committee will continue to be involved in introducing direct selling to EU Policymakers and maintain a constant dialogue with those with whom the contact has already been established.

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Companies Committee



Anne Crews (Mary Kay),
Chairwoman of the Companies Committee

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

The Committee 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 Anne Crews, Mary Kay's Vice President Public Affairs.

Actions 2014-2015

One of the main priorities of the Companies Committee in 2014, 2015 and onwards remains the identification of trade barriers in national legislations, their evaluation, defining and implementing actions to remove such barriers. Seldia was successful in obtaining the removal of the ban of trade restrictions on direct selling in Austria and is monitoring other similar actions in Austria and in other countries as well.

The Companies' Committee monitored regulatory issues of concern for direct selling in several EU Member States and provided advices and support to local DSAs for their advocacy actions whilst keeping members informed about these challenges.

The Companies' Committee joined an advocacy campaign to include a specific recognition of direct selling within the upcoming international trade agreements such as Plurilateral Trade in Services agreement (TiSA) and Transatlantic Trade and Investment Partnership agreement (TTIP) between the European Union and the United States.

Plurilateral Trade in Services agreement (TiSA) has been an issue of particular importance on Companies' Committee agenda. As the negotiations are well advanced, Seldia, in cooperation with US and Canadian colleagues, have had regular contacts with TiSA negotiators at the bilateral and multilateral level both in Brussels and Geneva. Furthermore, together with European Service Forum of which it is a member³ Seldia was involved in the European advocacy coalition during the negotiating round in April 2015 in order to pursue the same goal – inclusion of a more specific recognition of direct selling within the upcoming TiSA agreement.

The Companies' Committee also worked 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 identified issues and proposed targeted solutions. Adding to this collaboration are also efforts by Seldia's corporate members to identify and establish new direct selling associations in European countries or neighbouring countries that lack such structures.

³ www.esf.be

Objectives 2015-2016

- **Abolition of remaining trade barriers**

Seldia will continue its efforts to succeed in the complaint against the Austrian ban to distribute food supplements via direct selling. The Committee will identify further national barriers which do not comply with the EU law and will tackle them through further complaints and advocacy strategies.

- **Advocacy on International Trade Agreements**

Seldia will continue to be engaged 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**

The Companies' Committee will oversee Seldia's actions to promote Women Entrepreneurship and the socio-economic benefits of direct selling with a focus on women entrepreneurs at all levels of the EU institutions. Seldia will organize further events as well as will continue to be actively engaged inside the Interest Group on Women Entrepreneurs within the European Parliament in order to implement its campaign for more visibility and credibility for Direct Selling in the European Union institutions.

- **Support national DSA in non-EU countries**

The Committee will support the staff of Direct Selling Associations in their advocacy actions to tackle taxations and legal issues encountered in their countries. The Companies' Committee will work together with the Non-EU DSA Committee on defining and implementing an advocacy program in countries where the legislation is either non-existent or challenging.

Non-EU DSAs' Committee



Pontus Andreasson
(Oriflame),
Chairman of the Non-EU
DSA 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, Kazakhstan and Norway, 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. Pontus Andreasson, Senior Director Advisory Counsel at Oriflame chairs the Committee.

Actions 2014-2015

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 Committees' central purpose is 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 European Union is the world's largest economic market. EC legislation therefore influences governments and law makers in other parts of the world, and particularly in European Economic Area, i.e. in countries such as Norway or Switzerland. This is why Seldia is vigilant and aims to involve all its members in its lobbying activities, i.a. through the Non-EU DSAs Members' Committee.

In 2014, the Committee monitored new regulations affecting direct selling companies in Turkey and issues related to cosmetic products in Russia. It also closely followed the overall situation in Ukraine and the way

the political crisis in that region impacted direct selling businesses.

Seldia supported initiatives undertaken by several of its member companies to set up a Direct Selling Association in Tunisia, and explored other alternatives with them to ensure that their businesses are well represented in that part of the world.

In 2015, the Committee held two meetings by conference calls and will have a meeting on 5th of October in Brussels. The important item on the agenda was the creation of new DSAs in neighboring EU countries (Belarus and Tunisia in particular) as the strong interest was expressed by Seldia corporate members with the view to have a gravity center for any future lobbying activities there.

Finally, the committee followed bilateral and multilateral trade negotiations between the EU and third countries in order to explore possibilities of the recognition of direct selling worldwide. The trade agreement which has occupied most of Seldia's time and efforts is Trade in Services Agreement (TiSA). Seldia

went to Geneva twice in order to meet trade delegations from TiSA negotiating countries. Furthermore, it joined the European coalition organized by European Service Forum with the same purpose – to advocate the Annex on Direct Selling in the agreement. The discussions are still ongoing.

Objectives 2015-2016

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.

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. In particular, in Belarus and Tunisia as the intention by corporate members was expressed for such DSAs in these countries.



Robert Kneschke - Fotolia.com

The Non-EU DSAs Committee will identify the existing trade barriers in non-EU countries (Turkey, Ukraine, Russia, Kazakhstan, etc.) and will actively engage in communication with the EU Commission in order to improve trade conditions for companies in these countries. Seldia will continue to follow the issue on the ban on the retail sale of alcohol containing non-food products in Russia as well as other bans in other countries of non-EU Seldia members on ad hoc basis, and will maintain its advocacy efforts in order to include the Annex on Direct Selling in Trade in Services (TiSA) agreement.

Ethic's Committee



Jules Stuyck (University of Leuven),
Chairman of the Ethics Committee

The objective of the Ethics Committee 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 a 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 organization Association Léo Lagrange pour la Défense des Consommateurs.

Actions 2014-2015

The Ethics Committee met three times and held several discussions by conference calls in between these dates.

Committees' members worked on the development of the consumer complaint website and standard online complaint form in cooperation with the consumers' association Association Léo Lagrange pour la Défense des Consommateurs. The website and the online complaint mechanism are required by the newly adopted European Directive on Alternative Dispute Resolution. Development of these tools included a possibly easy adaptation by member DSAs to fulfil the Directive's requirements at national level.

The Committee engaged in a long process to revise the Seldia Codes of Conduct in order to make them compliant with new EU legislation and generally speaking with the evolution of business practices. It should be noted that the Seldia Codes of Conduct set rules which often go beyond legal requirements.

The Ethics Committee drafted guidelines on health claims that address the growing use of the Internet by direct sellers and outline the EU health claim legislation.

Objectives 2015-2016

- **Ethics Committee**
 - Promotion of Code Administrator website and online complaints form:
 - Towards consumer organisations
 - Towards European and, if needed national authorities
 - Towards stakeholders
 - Towards industry
 - Finalisation and promotion of Guidance document on Health Claims;
 - Finalisation of amendments of the Seldia Codes of Conduct;
 - Assisting DSAs on complying with the new European Directive on Alternative Dispute Resolution;
 - Cooperation with WFDSA and US DSA on possible amendments to their Code of Ethics.
- **B2C Code Administrator**
 - Finalisation of the recognition procedure of B2C Code Administrator;
 - Continue handling complaints following the new platform.

Communications

The communication program 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.

External communication

Over the last four years Seldia developed an **external communication program** in Brussels with the objectives of raising the awareness of direct selling and its socio-economic benefits, as well as the association's visibility. This program includes activities in the European Parliament for promoting women entrepreneurship, meetings with key EU stakeholders and participation in European and international meetings dealing with issues of interest to our industry.

- Since February 2013 Seldia manages the pan-European Women Entrepreneurship Platform (WEP) (www.womenentrepreneurshipplatform.eu) which it co-sponsors together with Deloitte. The WEP includes over 40 member organizations which focus primarily on the promotion of female entrepreneurs. The platform allows Members of the EU Parliament to become “champions” for the cause and join the formally established Interest Group within the European Parliament where Seldia acts as a main stakeholder organization.



- On **3 December 2014** Seldia gathered over one hundred participants and a dozen Members of the European Parliament in the European Parliament with the objective of advertising the strengths of direct selling through the promotion of women entrepreneurship. The event focused on “the importance of improving access to finance for women entrepreneurs”, with four expert speakers giving presentations on this topic. The luncheon was hosted by Member of the European Parliament Teresa Jimenez and attended by i.a. representatives from several Corporate Members, WFDSA and DSAs.



- **On 22 April 2015**, Seldia, in partnership with the Women Entrepreneurship Platform (WEP) held the first of its now bi-annual lunch-debates to promote women entrepreneurship and raise awareness of MEPs on the specific challenges of women entrepreneurs. The lunch was hosted by MEPs Angelika Mlinar (Austria) and Sean Kelly (Ireland) and was well attended by six MEPs, representatives of the European Commission and other stakeholders. The debate focused on how innovation could impact on women's businesses.
- In the period 2014-2015 Seldia was present in Strasbourg for personal meetings with MEPs during plenary sessions of the European Parliament, whilst other meetings with MEPs were organized in Brussels. Our organization also visited national authorities in preparation of the Latvian and Luxembourg EU Presidencies in order to introduce them to our industry and advocate our positions in dossiers impacting direct selling businesses.
- In March 2015, Seldia joined a high-level EU/US industry delegation in Geneva to advocate our position for the inclusion of a specific language on Direct Selling in the upcoming Trade in Services Agreement (TiSA). The inclusion of a reference to direct selling would be the first of its kind and would establish our form of distribution as a recognized trade around the world. In the future Seldia will continue to be actively engaged in the TiSA negotiations and in cooperation with Direct

Selling Associations around the world in order for them to engage with national Ministerial officials in the capitols of the participating countries.

Internal communication

- Additionally to the monthly newsletter, Seldia launched **Direct Selling Real Time** in April 2015, a new weekly newsletter providing insights about the global Direct Selling Industry. **Direct Selling Realtime** is published on Seldia's website and sent out to subscribers.
- Besides memoranda and regular follow-ups on actions and committees' meetings, the internal communication with members now also include an **EU Policy Update** newsletter published on a bi-monthly basis or on an ad hoc basis.
- Seldia continues to cooperate closely with the **World Federation of Direct Selling Associations**, participating in its Ethics Committee, Global Regulatory Affairs Committee, Association Services Committee and Global Research Committee in charge of collecting annual statistics. Seldia maintains close relationships with the US DSA as well, participating in in meetings of its International Council.



Promoting the benefits of Direct Selling







The European Direct Selling Conference Brussels 2014



European Direct Selling Conference

The 4th European Direct Selling Conference, Seldia's annual event, took place on 2nd of October 2014, with a record attendance of 170 participants from Europe and other parts of the world. In parallel, there was a growth in sponsors, exhibitors, speakers and workshops.

In his opening speech, Seldia Chairman Magnus Brännström, just re-elected for a second 2-year term, highlighted the growth of the industry in terms of sales and workforce during 2013. Keynote speaker WFDSA Chairman Alessandro Carlucci then emphasized the importance of a good branding strategy for the industry, that would address the younger generations.

Two panels followed the Chairmen's presentations. The first was the CEO panel with Peter Strydom of Amway, Martin Koehler of PartyLite, Patrice Jacquelin of Guy Demarle and Alessandro Carlucci of Natura. Peter Strydom highlighted that "The most important factor in our industry are ethical behavior and the codes of conduct. In this regard, the direct selling associations across Europe are very important, and Seldia in particular." Martin Koehler underlined that "It is evident that the success of our

industry lies in embracing innovation and social media." Alessandro Carlucci said that: "What is special about direct selling, is that all companies involved regularly meet in a friendly atmosphere. This is a strength in this sector." Patrice Jacquelin summarized the growth of the industry in France and Europe by stating that: "The direct selling model fits well in modern times and it remains a perfect distribution model to generate sales".

At the branding panel, both Sara de Dios of Havas Communications Group and Tom Harms of Herbalife underlined that a brand should offer more than recognition for the consumer. As the session moderator Ben Woodward of Nikken captured it: "Successful brands offer a sense of 'community' and 'belonging' to the consumer".

Prof. Dr. Jules Stuyck and consumer representative Amel Haikem of Association Léo Lagrange presented Seldia's new European website for consumer complaints, www.fairselling.eu, which was welcomed as an excellent illustration for the industry's commitment to work with consumers and to offer an accessible resolution for any dispute that may arise.

The conference included four breakout sessions on "sales through tablets", "food and cosmetics regulation", "DSA best practices" and "cost reduction". The conclusion was made by retail trend watcher Olivier Badot, Dean at the prestigious French ESCP business school.

The 5th edition of the European Direct Selling Conference will take place in Brussels on 7th of October 2015.





Seldia "Astra Awards" of the Year

The Seldia Annual Astra 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. New Astra Awards bestowed in 2014 to recognize the Best Service Provider and the Best New Company of the Year.

Preceding the conference, the Astra Awards were celebrated in a dynamic evening on 1st of October during a dinner which gathered about 120 participants.

The winners were of the 2014 Astra Awards were PartyLite (Best Company), the UK DSA (Best DSA), Stella & Dot (Best New Company) and Meridian Deutschland (Best Service Provider).

An Astra Personality of the Year Award was handed to Teresa Jimenez, Spanish Member of European Parliament, for her active support to the Women Entrepreneurship Platform and for hosting a large Seldia event in the European Parliament.

Socio Economic Report 2014-2015



70%

of direct selling is
person-to-person



EU sales

Up 4%



Cosmetics

Represent 36% of total sales

Direct Selling in Europe – an overview

What is direct selling in 2015 ?

Through face to face communication with consumers, away from business premises, direct selling is creating demand for products and services and satisfying that demand in transactions concluded, normally, in the homes of consumers.

Seldia represents, in Brussels, the interests of 28 national Direct Selling Associations and their member companies across wider Europe. Predominantly, these direct selling companies compete with other channels of retail distribution in the introduction and selling of a wide range of competitively priced and frequently novel, consumer goods and services. Over the past year this channel of distribution has increased its volume of business by 7.5% - well ahead of its conventional retail competitors.

In 2014, direct selling accounted for sales of € 24.5 billion in Europe of which € 20 billion were in EU Member States – with Germany, France, UK, Italy and Poland remaining the strongest markets. Whilst most of the Western markets enjoyed renewed growth in 2014, direct selling continues to expand in Eastern Europe despite the negative impact of the political crisis in Ukraine.

Direct selling is now a worldwide distribution channel, as shown by the figures Seldia and the World Federation of Direct Selling Associations (WFDSA) collect together since 2009. The 2014 figures published by both organisations reported a 6.4% increase in global direct sales in 2014, to US \$ 183 billion.

“Seldia represents, in Brussels, the interests of 28 national Direct Selling Associations and their member companies across wider Europe.”

Who are today's direct sellers ?

Direct selling companies do not rely on advertising to create demand for their products and services. Instead, they reward independent direct sellers, both men and women of all ages and all origins, without any gender or education distinction, for introducing and selling their products to others – those products that they like and use and are happy to endorse and recommend. Direct selling is Europe's largest provider of independent business opportunities.

Under fair and effective EU consumer protection law and with the added backing of a well administered Seldia industry codes of practice, that protect both customers and direct sellers, these micro business opportunities are growing in popularity.

In 2014 the total number of active direct sellers in the EU increased to 5.7 million – and to 99.7 million worldwide. The flexible, part time feature of these business opportunities, demanding only a very modest initial business investment, has meant that they have a particular appeal to women wishing to keep the right balance between family and professional lives. Currently, illustrated by both Seldia and WFDSA surveys for 2014, 79% of Europe's direct sellers are women and 80% of all direct sellers run their businesses on a part time basis. By providing micro business opportunities, direct selling also empowers entrepreneurship and particularly women entrepreneurship. Through its support to the Women Entrepreneurship Platform (WEP), Seldia calls

for more EU programs encouraging women to consider entrepreneurship and providing them with guidance in business development areas.

Products

Cosmetics and personal care products remain the top category of products sold in direct selling in 2014 with 36% of market share. But wellness products continue their steady progression, occupying now the second position with 23% of market share, and are expected to keep progressing over the next years. Other products' ranges, especially those sold in home parties which represent 28% of total sales, enjoy a stable growth, showing that direct selling is able to reply to consumers' increased demand for alternative ways of purchasing, no matter whether the purchase concerns a lipstick, a dress, wine or a kitchen appliance.

How do direct sellers generate business and compete with the internet and e-commerce

The most recent Seldia survey shows that 70% of direct sales are made on a person to person basis presenting and selling products to a group of friends and neighbours. This proportion is largely unchanged from the previous year.

Last year, Seldia reported on the adoption of social media by direct sellers. Far from being a threat to direct selling, social networking is proving to be hugely beneficial to direct sellers in enabling them to communicate and send



information to their friends and neighbours and obtain repeat orders quickly and efficiently.

Internet, development of new technologies, multiple social networks and social media represent huge opportunities for the direct selling industry. Whilst maintaining the face-to-face approach, the direct selling industry is ready to take up the challenges of internet and e-commerce and seize the many opportunities offered by new technologies to ensure that direct selling businesses continue to grow.

“Wellness products continue their steady progression, occupying now the second position with 23% of market share”

Direct Selling in 2015

SALES

Europe **24,5 billion €**

EU **20 billion €**

DIRECT SELLERS

Who are direct sellers?

Direct sellers are individuals of all ages and backgrounds 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.

Europe **13,9 million**

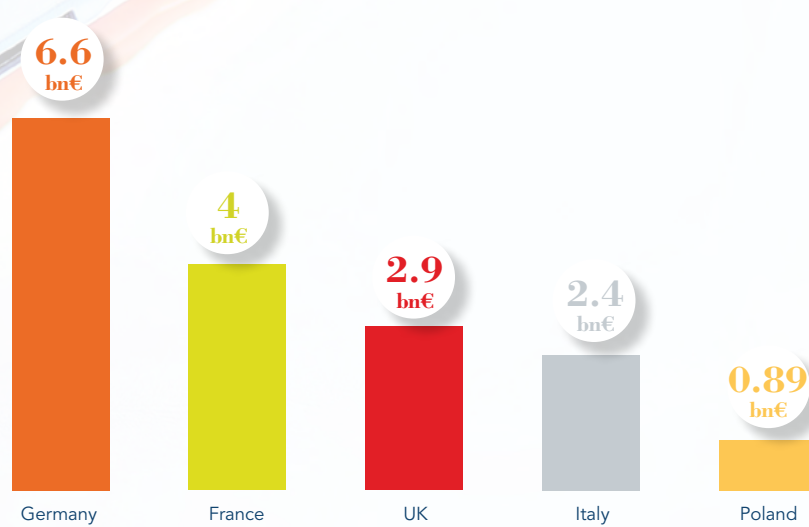
EU **5,7 million**
(out of which 79% are women)

BREAKDOWN OF SALES PER PRODUCTS CATEGORIES



“Direct Selling is Europe’s largest provider of independant business opportunities”

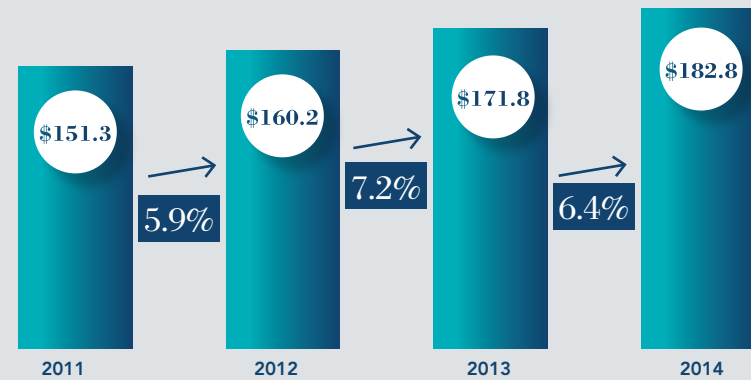
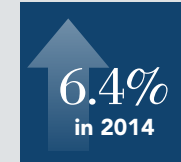
TOP FIVE MARKETS IN EU



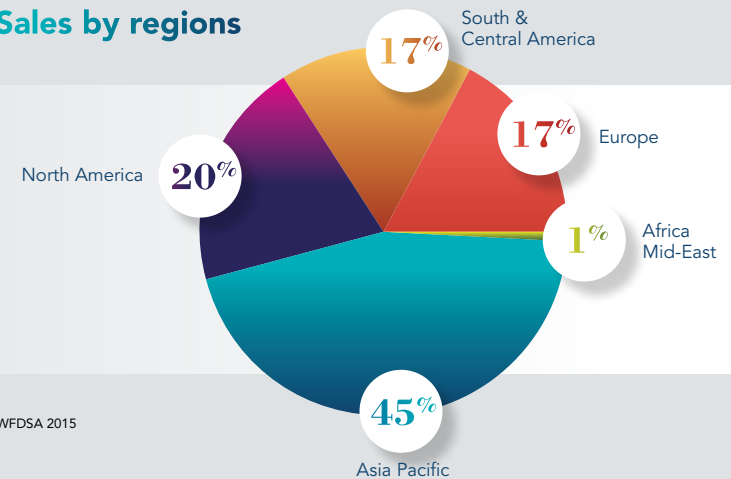
GLOBAL FIGURES

Global retail sales & increases

2011-2014 (USD Billions - 2014 ConstantDollars)



Sales by regions



Sources: WFDSA 2015

Direct Selling in Europe

2014 Retail Sales
(in million € - VAT excl)

20.1 billion €
Total sales in the EU

24.5 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) Average annual exchange rates for 2014 from the European Central Bank 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 2014 report will be published in August. Preliminary figures indicate the size of the German market at 15,3 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	2014 Sales ⁽¹⁾		2014 Nr of Direct Sellers ⁽³⁾		
	Local currency (millions)	EURO (millions)	Nr	%	women
Austria ⁽⁵⁾	224	224	165270	na	
Belgium ⁽⁵⁾	193	193	20910	na	
Bulgaria ⁽²⁾⁽⁵⁾	158	81	118340	na	
Croatia	320	42	39986	80%	
Czech Rep ⁽²⁾⁽⁵⁾	6432	234	276390	na	
Denmark ⁽²⁾⁽⁵⁾	486	65	62580	na	
Estonia ⁽⁴⁾	31	31	36150	95%	
Finland	184	184	84120	86%	
France	4001	4001	572000	80%	
Germany ⁽⁶⁾	6686	6686	414057	75%	
Greece ⁽⁵⁾	151	151	194290	na	
Hungary	53305	173	470544	69%	
Ireland	27	27	24000	75%	
Italy	2419	2419	508943	75%	
Latvia ⁽⁴⁾	30	30	47093	96%	
Lithuania	94	94	103336	95%	
Luxembourg	42	42	2700	na	
Netherlands	119	119	48144	71%	
Poland	3740	894	970933	87%	
Portugal ⁽⁵⁾	209	209	195180	na	
Romania ⁽²⁾⁽⁵⁾	1250	281	302500	na	
Slovakia ⁽⁵⁾	130	130	180380	na	
Slovenia	15	15	21000	75%	
Spain	634	634	205265	68%	
Sweden	2241	246	99891	80%	
UK	2367	2974	544000	75%	
Total EU		20177	5708002	79%	
Norway ⁽²⁾	838	100	102762	80%	
Russia ⁽²⁾	138305	2714	5425830	88%	
Switzerland ⁽⁵⁾	306	252	156210	na	
Turkey ⁽²⁾	1920	661	1145768	84%	
Ukraine ⁽²⁾	5674	359	1041940	85%	
Others ⁽⁵⁾	371	279	369700	na	
Total		24542	13970212	84%	

Because we care

Nearly

\$74.2 million

donated to charities in 2014

Reported giving increased by

7%

in 2014

Financial contributions of direct sellers up

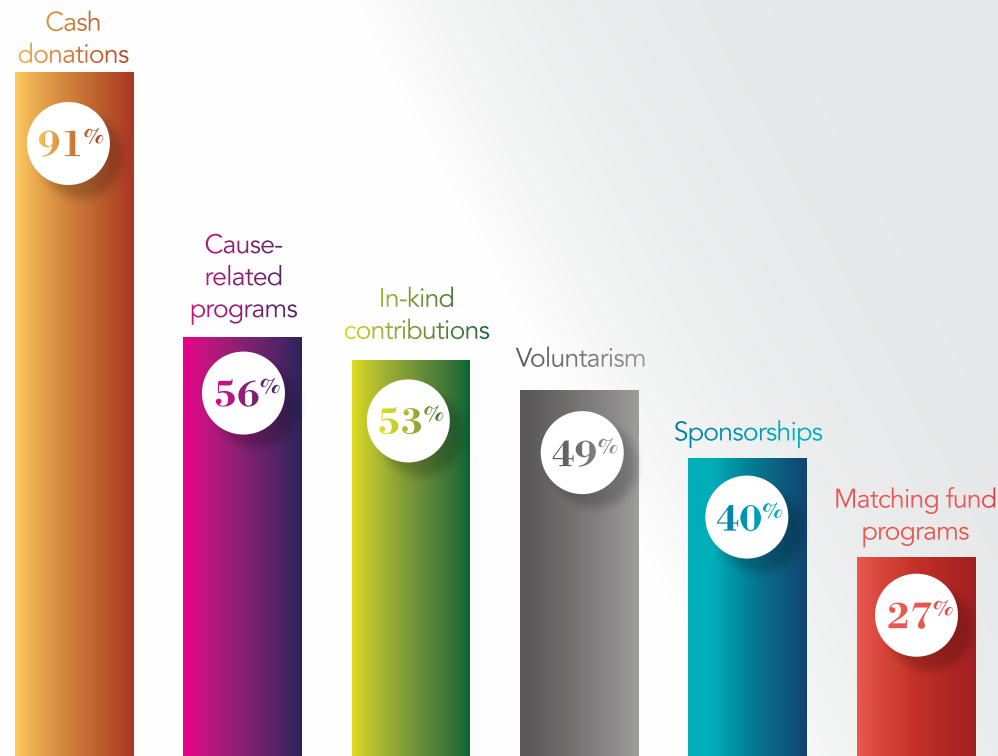
21%

in 2014

Direct selling – a sector which seeks to give a hand to those who need it the most. It is the industry which has in many occasions showed its compassion and contributed to humanitarian causes. In 2014 – 2015 direct selling companies helped thousands of people to flourish and thrive. Our purpose is to continue this activity in responsible and sustainable ways. Our companies are strongly committed

to legal, ethical, moral and social standards and definitely know what corporate social responsibility is about.

Over one in five direct selling companies have had philanthropy activities since the founding of the company. That way they reflect the values of founders and contribute to the world's well-being. The most common forms of giving are:



Sources: WFDSA 2015



Seldia is not an exception. In 2014 – 2015 it made a donation in favor of the many injured people in Nepal further to the devastating earthquake which took place in April. It was not the first time for Seldia as it made similar gestures in the past (tsunami, Haiti earthquake).

The benefits of not being indifferent are enormous. What benefit the most from these donations are:

Health & Human Services

91%

Education

69%

Economic Development

36%

Environmental Protection

31%

Arts & Culture

20%

Sources: WFDSA 2015

Sergey Nivens - Fotolia.com

Direct Selling industry is encouraged by this experience and it looks to the future as a possibility to foster continued focus on developing policies of corporate social responsibility. We believe that amazing things happen when you help those who need your help the most.

Seldia Members

	<p>Bulgaria Bulgarian Direct Selling Association (BDSA) Website: www.bdsa-bg.com</p>	
	<p>Croatia Croatian Direct Selling Association (HUDP) Website: www.hudp.hr E-mail: info@hudp.hr</p>	
	<p>Czech Republic Direct Selling Association of Czech Republic(AOP) Website: www.osobniprodej.cz E-mail: info@osobniprodej.cz</p>	
	<p>Denmark Direct Selling Association of Denmark (DSF) Website: www.disafo.dk E-mail: info@disafo.dk</p>	
	<p>Estonia Estonian Direct Selling Association (EDSA) Website: www.edsa.ee E-mail: info@edsa.ee</p>	
	<p>Finland Direct Selling Association of Finland (ASML) Website: www.asml.fi E-mail: info@asml.fi</p>	
	<p>France Direct Selling Association of France (FVD) Website: www.fvd.fr E-mail: info@fvd.fr</p>	
	<p>Greece Hellenic Direct Selling Association (HDSA) Website: www.esiap.org.gr E-mail: info@esiap.org.gr</p>	

	<p>Hungary Direct Selling association of Hungary (KESZ) Website: www.dsa.hu E-mail: office@dsa.hu</p>	
	<p>Ireland Direct Selling Association of Ireland (DSA) Website: www.dsai.ie E-mail: Office@dsai.ie</p>	
	<p>Italy Direct Selling Association of Italy (AVEDISCO) Website: www.avedisco.it E-mail: avedisco@avedisco.it</p>	
	<p>Kazakhstan Direct Selling Association of Kazakhstan Website: www.ltpa.lt E-mail: konstantin.kulinitch@mkcorp.com</p>	
	<p>Latvia Latvian Direct Selling Association (LTTA) Website: www.tta.lv E-mail: tta@tta.lv</p>	
	<p>Lithuania Lithuanian Direct Selling Association (LTPA) Website: www.ltpa.lt</p>	
	<p>Luxembourg Direct Selling Association of Luxembourg (AVD) Website: www.avd.lu E-mail: info@avd.lu</p>	
	<p>Norway Direct Selling Association of Norway (DF) Website: www.direktesalgforbundet.no E-mail: post@direktesalgforbundet.no</p>	

	<p>Poland Polish Direct Selling Association (PSSB) Website: www.pssb.pl E-mail: info@pssb.pl</p>	
	<p>Portugal Direct Selling Association of Portugal (IPVD) Website: www.ipvd.pt E-mail: info@ipvd.pt</p>	
	<p>Romania Direct Selling Association of Romania (ACVD) Website: www.acvd.ro E-mail: contact@acvd.ro</p>	
	<p>Russia Direct Selling Association of Russia (APP) Website: www.rdsa.ru E-mail: info@rdsa.ru</p>	
	<p>Slovakia Direct Selling Association of Slovakia (ZPP) Website: www.zpp.sk E-mail: zpp@zpp.sk</p>	
	<p>Slovenia Direct Selling Association of Slovenia (SDP) Website: www.dsa.si E-mail: info@dsa.si</p>	
	<p>Spain Direct Selling Association of Spain (AEVD) Website: www.avd.es E-mail: avd@avd.es</p>	

	<p>Sweden Direct Selling Association of Sweden (DF) Website: www.direkthandeln.org E-mail: info@direkthandeln.org</p>	
	<p>The Netherlands Direct Selling Association of the Netherlands (VDV) Website: www.directeverkoop.nl E-mail: vdv@directeverkoop.nl</p>	
	<p>Turkey Direct Selling Association of Turkey (DSD) Website: www.dsd.org.tr E-mail: info@dsd.org.tr</p>	
	<p>Ukraine The Direct Selling Association of Ukraine (UAPP) E-mail: udsa_media@mail.ru</p>	
	<p>United Kingdom Direct Selling Association of the United Kingdom (DSA) Website: www.dsa.org.uk E-mail: info@dsa.org.uk</p>	

Corporate Members



www.acneuro.com



www.amway.com



www.captaintortuegroup.com



www.energetix.tv



www.herbalife.com



HEALTH & BEAUTY
SYSTEMS

www.lrworld.de



www.oriflame.com



www.eu.kyani.net



www.marykay.com



www.morinda.com



www.nikken.eu



www.nlstar.com



www.nseurope.com



www.partylite.com



www.pm-international.com



www.stelladot.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's 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.



“Sharing expertise and knowledge, exchanging information and best practices”



Service Provider Members

Meridian Germany

Meridian Deutschland is a renowned privately owned consultancy located in the Greater Frankfurt area. More than 40 years of experience in direct sales and an excellent network developed us to experts in this dynamic industry. We are your competent partner for target-oriented management consulting in the direct sales industry. In order to sustain a business in the long run and to strengthen the direct sales branch, our client's success is our top priority.

www.meridian-deutschland.com



Meridian MMi Ltd

MeridianMMi are an Executive Search and Consulting company specialising solely in the Direct Selling Industry. Our focus is on the European wide market working from our base in the UK and with alignment directly to partners and associates who cover Italy, Spain, Portugal, Poland, France and Germany, pooling together our many years of extensive experience and contacts.

www.meridianmmi.com



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

Jenkon develops game-changing mobile and web technology solutions for global direct sellers. Jenkon's unparalleled heritage began in 1978 when we became the first enterprise software provider in direct selling history. Since that time, Jenkon has become the world leader in creating and supporting mobile and web-based software solutions for multi-national network marketing and party plan businesses.

www.jenkon.com



Upline

Upline 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



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. The Logistics sector of DB is the world's second largest transportation and logistics services provider based on



revenues and performance. DB Schenker has a global network geared toward customer service, quality and sustainability.

www.dbschenker.com

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



Vista Events

Vista Events is a leading Destination Management Company specializing in the organization, management and implementation of Conferences, Incentives, Product Launches and Corporate Events throughout the mainland Greece and the Greek Islands. Voted Best DMC at the M&IT Awards for nine consecutive years.

www.vistaevents.com



Fiska France

Our firm is specialized in direct selling, helps you dealing with fiscal and social issues in the sector. The technical skills of our experts, our commitment and our long experience in the field enables us to support you in daily tasks as well as issues with social and tax agencies

www.fiska-france.fr



Vistaprint



Vistaprint offers ideal online printing solutions for direct selling companies, proposing a large range of products that require a high level of brand control, such as co-branded and supported website to host their print collateral. We offer account management and promotional support, discounted pricing and revenue share.

www.vistaprint.be

PAN European Solutions Limited



PAN European Solutions Limited is a team of consultants with unrivalled specialist experience and expertise in the Direct Selling industry. PAN European Solutions Limited is UK-based team, but regularly works on a multi-national basis, drawing upon the local skills and knowledge of collaborators in other countries with whom the team members have developed long-standing, excellent working and personal relationships.

www.paneurosolutions.com

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Landmark Global



For more than a decade, we have enabled the global growth of our customers. Our business has grown from basic international mail and parcel delivery to providing full service end-to-end solutions, including proprietary technology and trade consulting that provides our clients the capability to sell to millions of customers worldwide.

www.landmarkglobal.com

Zahlmann Consulting



Global Executive Search, International Market Consulting, Sales Trainings, Sales Systems, Direct Selling Marketing, Business Intelligence. Our company is a global working consulting firm specialized on sales and international business solutions with more than +20 years experience in the direct selling and active selling industry. With offices in 6 locations worldwide and 16 partners and experts with their special expertise we deliver cutting edge sales results with a full-service attitude.

www.zahlmann.com

Membership of Committees (active members)

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

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Philippe Jacquelinet	Captain Tortue Group
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Armel Peillonnex	PartyLite
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