



What's
Hot around
the Globe:

Insights on
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What's Hot around the Globe



Insights on Growth in Personal Care Products



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The information contained in this report has been collected from Nielsen in 69 markets around the world. For questions or to obtain more detailed information by market please contact your local Global Services representative or via email at

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What's Hot around the Globe:

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Insights on Growth in Personal Care Products



Executive Summary

This 2007 edition of *What's Hot around the Globe – Insights on Growth in Personal Care Products* looks at the fastest-growing categories and product areas across 69 key markets around the world, based on their value sales increases from 2005 to 2006. The consumers and these markets make up more than 75% of the world's population, contributing more than 90% of the world's GDP.

Through our series of *What's Hot* studies, Nielsen has identified some general trends relating to consumer purchases:

- A Continued Focus on Health
- The Need for Convenience
- The Continuing Need for Value

Consumers seek products that are healthful and beneficial to them, and that make their lives easier...all offered at a good value. These trends again surface when studying Personal Care items in the following ways.

Health

A concern for healthy skin is seen to be a global trend. With an aging population and more information about the long-term effects of the sun, there has been much growth in products aimed at taking care of consumers' skin. Examples include items such as face moisturizing, hand and body moisturizing, and sun protection products.

This follows previous *What's Hot* studies, which also found consumers reaching for healthy items. The recent food & beverage report showed increases in purchases of yogurt, salads and fresh fish. The study on household products also centered on keeping the home healthy, with disinfectants and sanitizing products showing growth.

Convenience

Time continues to be a precious commodity for much of the developed world, and consumer products that help save time are always popular. Examples in the area of Personal Care include disposable diapers and changing pads for babies. Also, personal and baby wipes have been showing strong growth, reinforcing the concept of making our lives more convenient. Another consumer nod towards convenience is the fact that bath and shower gels are growing faster than standard toilet soap globally, and within every region except Asia Pacific.

Value

When looking at the concept of value, it is important to remember that value is not based on price alone but rather a combination of elements that enhance the consumer's perception of what they are receiving for the money. Many times this is expressed in terms of sales of private label items. To be sure, Personal Care items are showing growth, and in many cases private label is growing at similar rates. This report includes information on private label items where relevant.

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Other studies on consumer concerns

Recently, Nielsen interviewed consumers on the Internet about their attitudes toward health, beauty and personal grooming. The March *Health, Beauty & Personal Grooming* study provided some context to better understand the behaviors exhibited in this *What's Hot in Personal Care* study. Several additional themes emerged from that consumer survey which also apply to this study of Personal Care items.

For example, hair care and skin care regimes were seen as an important component to beauty and grooming. When considering the data for this study, it becomes obvious that a large portion of consumer spending on Personal Care goes to hair and skin care products. In addition, it was noted that in some cultures there is a strong pressure to look good all the time.

Continued acceptance of grooming and beauty items for males was another element to the consumer survey that was again corroborated by certain categories in this study. Items such as male cologne, hair coloring and shaving items all showed strong growth, and echoed the consumer sentiments as well.

Products that lighten the skin were reported by the consumer survey to be a strong influence in Asia. By looking at and understanding the data collected in this study of Personal Care purchases, we can see that skin lightening is growing in most all the markets measured, including Asia and the Middle East. In fact, it was one of the fastest-growing categories globally. As more markets begin to sell these items, it will be interesting to see if this trend continues.

Consumers were also asked in the consumer survey about their ultimate indulgences: the things they would like more of if money were no object. Two items – body massage and tooth whitening – were at the top of the list. This *What's Hot in Personal Care* study found that people are bringing indulgence home in the form of massage oils and creams. However, the tooth whitening categories are not showing the growth they saw in years past. This is in part due to the fact that this category was growing strongly in years past and could not sustain the trend. However, distribution has declined in some countries, with consumers looking for whitening products that have better perceived results.

Finally, age demographics again play a role in purchases. A reflection of the aging of consumers can be seen by increases in products such as denture fixatives and incontinence pads/pants. This was seen across regions, and not just in the more-developed markets. In addition, younger families who have children are also driving the need for infant related products such as disposable diapers, wipes and changing pads.

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Overall findings: Global growth in Personal Care: 5%

The global growth of Personal Care categories measured was 5%, which is slightly higher than the growth rates shown in recent Food & Beverage and Household Care studies. As with past studies, the growth rates varied significantly between regions and within categories. Based on our analysis there are several top-growing categories that reinforce the key themes of Health, Convenience and Value.

Top Global Growth Categories: “Skin is In”

What is notable among the categories with top sales growth is the number of items that focus on caring for the skin. These seven categories all were growing at more than twice the global average. Many of these fastest-growing categories are also large, with global sales of over US \$1 billion.

Massage Creams / Oils: +26% Growth

The quest for indulgence at home helped boost the Massage Cream/Oil category. While still a smaller category, this was a hit with consumers due to new product introductions and advertising support.

Specialist Cleansing – Hand: +22% Growth

Second on the list of fastest-growing global categories, these hand cleaners do not need water to work and cut through grease and other stains. The fastest-growing markets for these items are many Eastern European markets as well as China and India.

Skin Lightening: +21% Growth

The next skin-related item on the top-growing list, skin lighteners are popular in Asia, and showing growth in the Middle East as well. In some cultures, a lighter skin tone is equated with being more sophisticated and urbane, which may be one reason these are growing so rapidly in some markets.

Mouthwash/Oral Rinses/Antiseptics: +12% Growth

Caring for the teeth and mouth is another health focus for consumers, and this category has shown some strong growth. In some markets, it is due to a growing private label presence, but in many cases, manufacturers have either introduced new product lines or increased their advertising and marketing of these items.

Sun Protection: +11% Growth

The third skin-related category on this top-growth list, sun protection is becoming a larger category in large part due the increased awareness consumers may be getting on the health effects of the sun.

Incontinence Pads/Pants: +10% Growth

The aging population is continuing to influence product purchases. While some of the more developed markets contributed to this category in terms of value sales, many of the developing markets had the higher year-over-year growth.

Face & Eye Moisturizers: +10% Growth

The fourth skin-related category on this top-growth list, these items show that consumers want their health and want to keep looking youthful and healthy.

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Other Fast-Growing Categories

There were 16 additional categories growing faster than the global average, some of which were also over US \$1 billion in sales. When looking at these categories it is interesting to note that they also echo many of the themes that consumers desire – health, convenience, and value. Throughout this study, we see the desire of consumers to have the products that improve and enhance their lives.

About the Study

This survey of Personal Care Products included 69 markets around the world and over 70 product categories. These markets account for over 90% of the world's real GDP and 75% of the world's population. The markets have been grouped regionally into five areas: Asia Pacific, Eastern Europe, Middle East and Africa (EEMEA), Europe, Latin America and North America. For the purposes of this study, Mexico has been included in Latin America. A more detailed explanation of the markets, categories and data collection channels is contained in the Methodology section in the report appendix.

Nielsen analyzed data across categories, comparing year ending 2006 with year ending 2005. These categories have been grouped into nine larger product areas for the purposes of this study. This study also looks at some of the key categories within these product areas to understand the changes impacting their overall growth. To obtain a global perspective, local currency was converted to US dollars using a constant exchange rate across the two years.

Also included is an analysis of private label products within each category, to better assess the impact of both manufacturer and retailer products as drivers of consumer purchasing behavior.

As with our other studies, this report is based on purchasing information from retailers in grocery, drug and mass merchandise outlets and generally excludes kiosks or vending machines. In a few markets, sales from convenience stores may be included. Within the United States, data from Nielsen's consumer panel service has been included to provide a total market read that includes Wal-Mart information.

Some parts of this study reference the earlier 2003 *What's Hot* study on Personal Care. Due to the variances in time periods, markets and category coverage, comparisons to previous studies should be used as a point of reference but not for actual year-over-year trend analysis.



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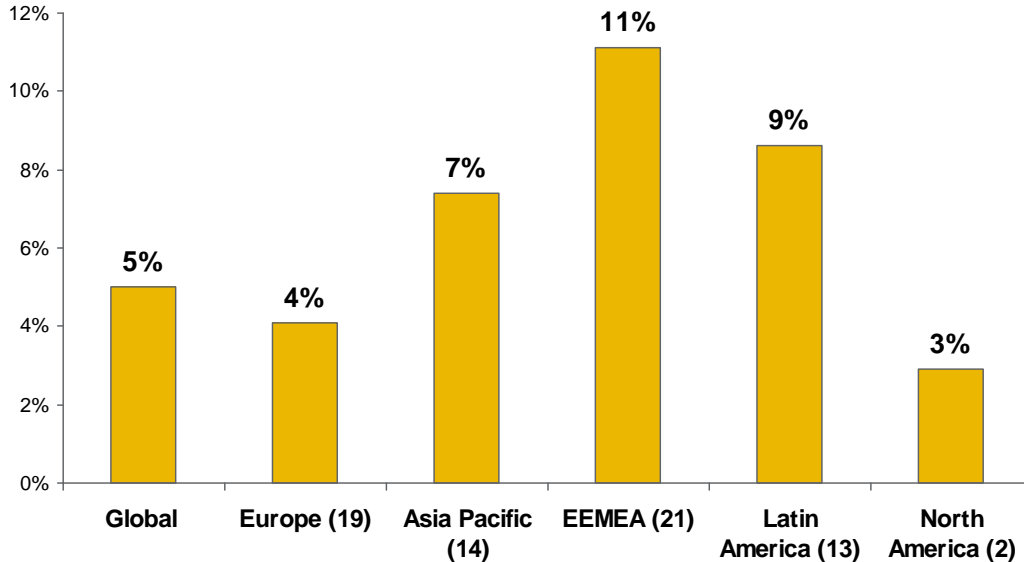
Global Findings

Overall, Personal Care grew globally by 5% through 2006

Across the markets and categories analyzed for this study, the combined sales of Personal Care items grew by five percent in the 12 months ending December 2006. This growth rate is slightly higher than the recent studies focusing on Food & Beverages and Household Products, which showed growth of four percent.

Growth rates within regions did fall within a similar pattern to previous studies, with year-over-year growth in Latin America and in the Eastern Europe, Middle East and Africa (EEMEA) regions showing higher growth rates than other regions. Perhaps as expected, the more developed markets of Europe and North America showed a net growth slower than the global average.

**Year over year growth of
Personal Care products by region*
(2005 – 2006)**



*Based on category value sales measured

(Number of markets in parentheses)

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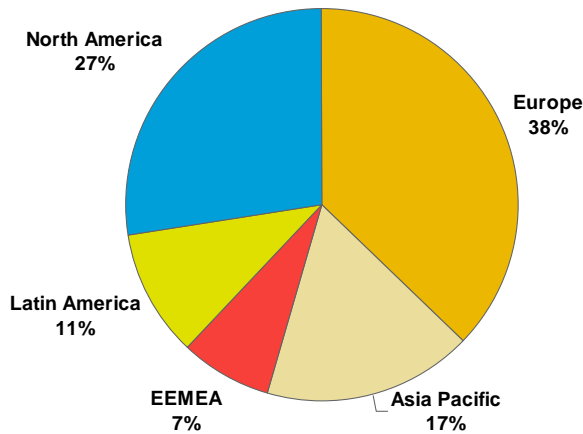
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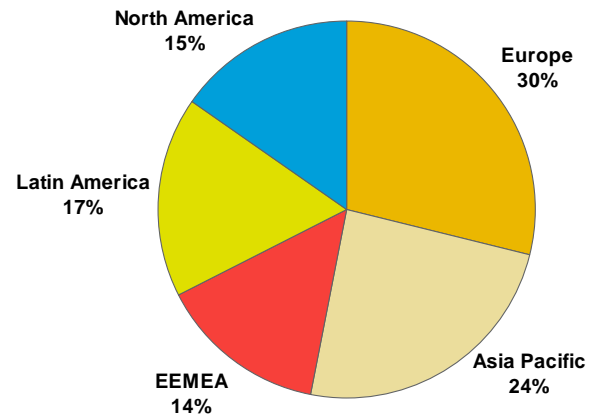
Global Findings

The largest share of value sales in Personal Care products came from Europe, followed by North America. Asia Pacific and Latin America both had double-digit share of the overall sales, while EEMEA had only 7% of the overall sales. When looking at the contribution to year over year growth, which takes into account both value sales and growth rates, we see that Asia Pacific, Latin America and EEMEA all contribute more than their share of total sales would indicate. This highlights the impact these regions have on new growth in Personal Care categories.

Global Share of Personal Care Products



Contribution to Total Growth Value in Personal Care



In addition to looking at individual category growth, Personal Care items were also grouped into nine larger product areas. All but one of these had growth rates at or above the global average. The product area growing the fastest overall was Sun Care/Skin Coloring, while Body Cleansing & Moisturizing contributed the largest value.

Contrary to recent studies on Food & Beverages and Household Care products, the largest categories in terms of total value sales showed growth at or near the global average. The top three largest categories, Toilet Tissue, Disposable Diapers and Shampoo all grew at five percent.

The following sections detail these findings.



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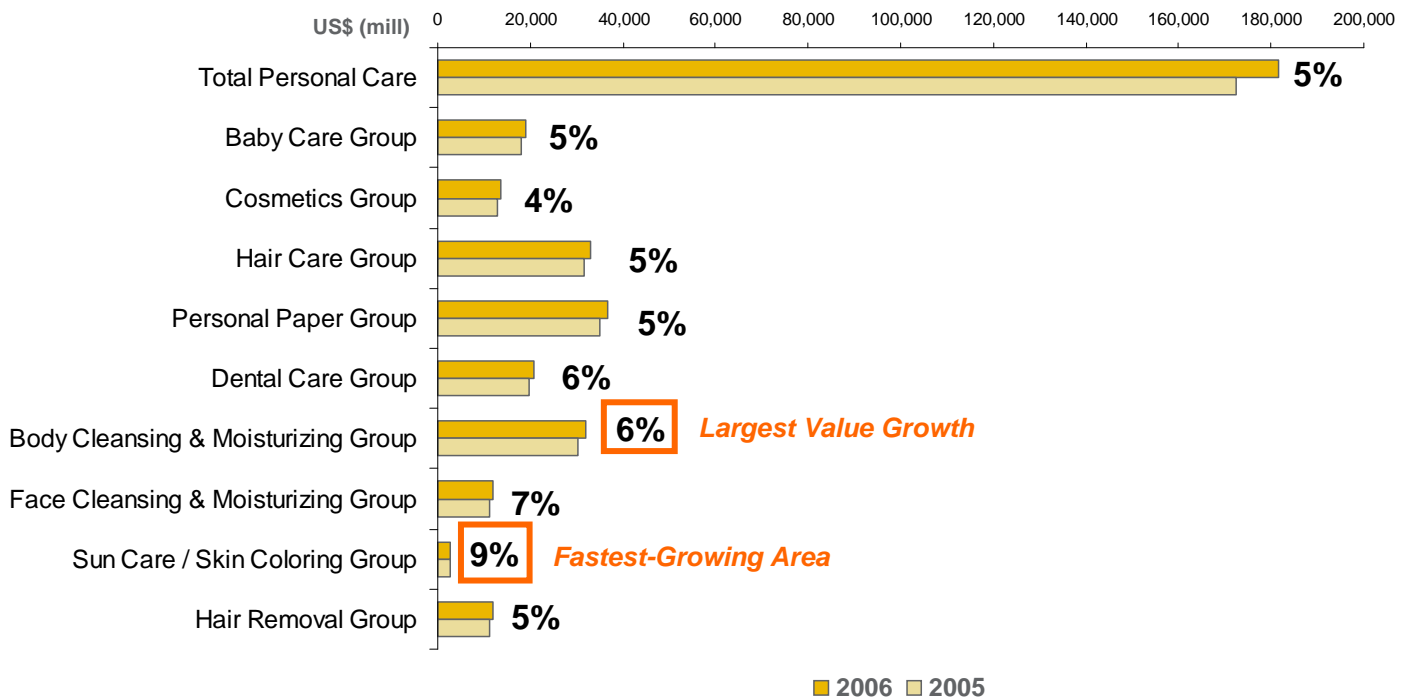
Category and Segment Growth

All product areas show a net positive growth

Across the product categories measured, there was a great deal of difference in the levels of growth and decline. The fastest growing category overall, Massage Creams & Oils, grew by 26%. At the other end of the spectrum, both Self Tanning and Facial/Body Hair Bleaching, showed declines of 5% in the markets measured. However, when looking at the categories as a whole within their product groups, it is clear that there is much more positive growth in Personal Care products than decline.

When looking at these nine product areas, there were four that were growing faster than the overall average. The fastest-growing product area was Sun Care/Skin Coloring, followed by Face Cleansing & Moisturizing. However, when looking at the value growth, which takes into account the size of the product group as well as the percentage growth, Body Cleansing & Moisturizing was at the top.

Global Growth by Product Area
(US \$ million)



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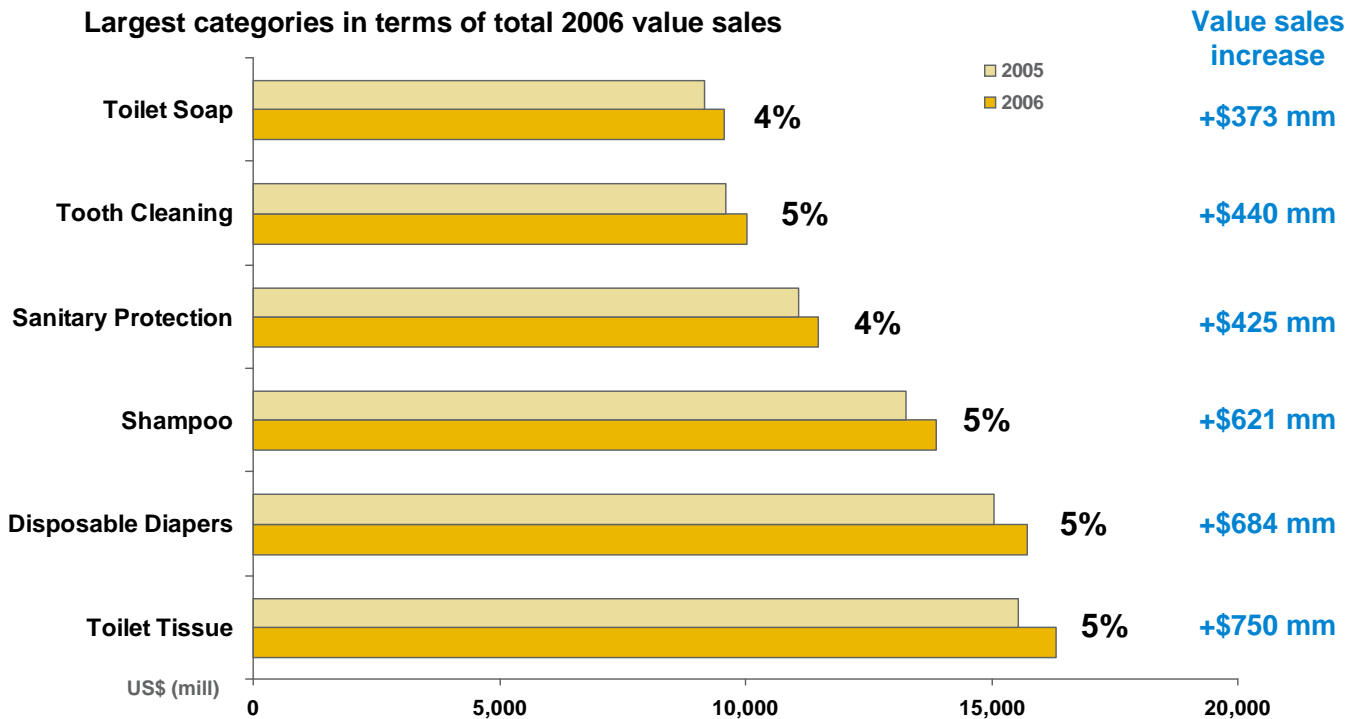
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Largest Absolute Growth

Toilet Tissue and Diapers contribute more than \$1 billion in year-over-year growth

Strong growth was not limited to new or smaller categories, however. The categories that were largest in size were also growing at or near the global average, contributing large amounts in value sales to the year-over-year increase. Four of the six largest categories were growing at the global average, and the top two categories showed increases in value sales of \$750 million and \$684 million respectively – a contribution of \$1.4 billion to value growth.



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Categories on the Decline

Only a few declining categories; some were former fast-growing categories

When looking at Personal Care products, only five were on the decline, with one of those essentially flat in growth. The previous Personal Care study, produced in 2003, showed some of these categories to be growing. While this and the prior study are not to be considered equivalent for forming a trend, the decreases here do indicate a change.

In the prior study, Tooth Stain Removers/Whiteners were a new market item and the fastest-growing category overall. In the current study, these products were growing in only three of the eleven markets covered.

For Self-Tanning, half of the markets measured did show growth, but the declining markets made up a larger portion of sales, contributing to the overall decline. With the Facial/Body Hair Bleaching/Lightening categories, it was the US and Great Britain that were responsible for most of the trend.

The decline in Tooth Stain Removers/Whiteners is perhaps surprising, given the growth in prior studies and the stated consumer interest in tooth whitening based on Nielsen's recent *Health, Beauty & Personal Grooming* consumer survey. Looking further into this issue, some markets noted a decrease in distribution of whitening products, which would indicate lack of sales, as well as a decline due to consumers wanting stronger whitening programs than were sold over the counter. Some of the decline could also be due to consumers switching to retail whitening centers and dentist-supplied programs, although this point was not explicitly stated.

Declining Personal Care Categories	Sales Decline
Bath Additives (30)	-0%
Lip Cosmetics - Gloss/Tinted Balm/Liner (26)	-2%
Tooth Stain Removers/Whiteners (11)	-4%
Self-Tanning (24)	-5%
Facial/Body Hair Bleaching/Lightening (9)	-5%

NOTE: Bath Additives were only slightly down, at - 0.1%

Markets measured in parentheses



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Fastest Growing Categories

Across all categories, Massage Creams & Oils experienced the fastest growth

Seven categories were growing at twice the global average. Of these, four were related to caring for the skin: Massage Creams / Oils, Skin Lightening, Sun Protection, and Face & Eye moisturizers. This highlights the fact that consumers care about the appearance and health of the outside of their bodies, much like they want to be healthy with the foods they eat and the ways they clean their homes.

Of these fast-growing categories, four of the seven growing at more than two times the global average were also quite large. The highlighted categories below had global sales of more than US \$1 billion in 2006. For comparison purposes, private label growth is also included. For some of these smaller categories, a small year-over-year value change can mean a big percentage increase; however, in the larger categories, private label generally keeps pace with the overall category growth.

Fastest Growing Category	Product Area	Markets Growing/ Measured	Category Growth Rate	Private Label Growth Rate
Massage Creams / Oils **	Body Cleansing & Moisturizing	8 of 10	26%	91%
Specialist Cleansing – Hand	Body Cleansing & Moisturizing	7 of 9	22%	25%
Skin Lightening **	Sun Care / Skin Coloring	7 of 8	21%	287%
Mouthwash/Oral Rinses/Antiseptics	Dental Care	38 of 39	12%	7%
Sun Protection **	Sun Care / Skin Coloring	34 of 37	11%	12%
Incontinence Pads/Pants	Personal Paper	31 of 31	10%	10%
Face & Eye Moisturizers **	Face Cleansing & Moisturizing	47 of 52	10%	13%

 = Categories over US \$1 billion globally

** Skin care-related categories

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Many categories grew faster than the global average

There were 16 other categories that were growing faster than the global average. Both Baby Moist Wipes and Conditioners were close to growing at twice the rate of the global average. Of these 16 categories, ten of them had category sales of more than US \$1 billion in 2006.

Generally speaking, the smaller categories on this list showed a much faster private label growth rate than the overall category. However, when the category is larger, the private label growth is generally more in line with the overall category.

Category	Product Area	Markets Growing/ Measured	Category Growth Rate	Private Label Growth Rate
Baby Moist Wipes	Baby Care	37 of 39	9%	28%
Conditioners	Hair Care	47 of 49	9%	3%
Hand Sanitizers	Body Cleansing & Moisturizing	6 of 6	8%	28%
Hand/Body/All Purpose Moisturizers	Body Cleansing & Moisturizing	47 of 56	8%	7%
Powered Shavers	Hair Removal	6 of 7	8%	53%
Eye Cosmetics - Eyebrow/Mascara/Shadow	Cosmetics	20 of 23	8%	12%
Diaper/Nappy Rash Cream	Baby Care	22 of 25	7%	22%
Personal Moist Wipes	Personal Paper	22 of 26	7%	9%
Toothbrushes	Dental Care	60 of 65	7%	3%
Face Cleansing / Toning	Face Cleansing & Moisturizing	49 of 57	7%	2%
Denture Fixatives	Dental Care	15 of 16	7%	32%
Soothers - Pacifiers/Dummies	Baby Care	13 of 16	7%	30%
Deodorants (includes body sprays)	Body Cleansing & Moisturizing	58 of 64	7%	5%
Dental Floss/Tape	Dental Care	19 of 21	7%	7%
Body Cleansing Shower Gel	Body Cleansing & Moisturizing	48 of 51	6%	6%
Razors & Blades	Hair Removal	57 of 65	6%	7%

= Categories over US \$1 billion globally



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Key
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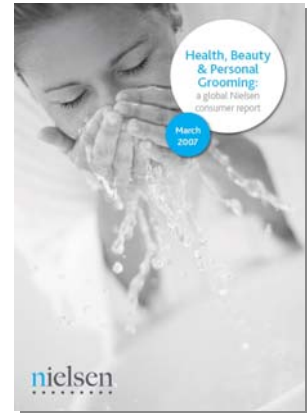


Key Consumer Trends

In addition to the *What's Hot* studies, Nielsen also periodically publishes consumer attitude research. In November of 2006, Nielsen surveyed over 25,000 Internet users from around the world about their purchase of health and beauty products. This survey, titled *Health, Beauty & Personal Grooming: a global Nielsen consumer report March 2007*, provided an opportunity to better understand the attitudinal and behavioral similarities of today's consumer.

According to the survey, the pressure to “look good” all the time was noted by some markets as an influencer of consumers' beauty care routines. In addition, the report uncovered some general themes from consumers:

1. Hair Care, Skin Care regimes an important component of health, beauty and personal grooming
2. A strong pressure to look good all the time was most felt in Brazil, Portugal & Greece
3. Male grooming / beauty items are continuing to gain general acceptance
4. Skin lightening products are a strong influence in Asia
5. The ultimate indulgence, if money were no object, were body massage and teeth whitening



Did consumers behave as they said they did? In general, the answer was yes. The following section details some of these consumer themes and how they were reflected in purchasing behavior.

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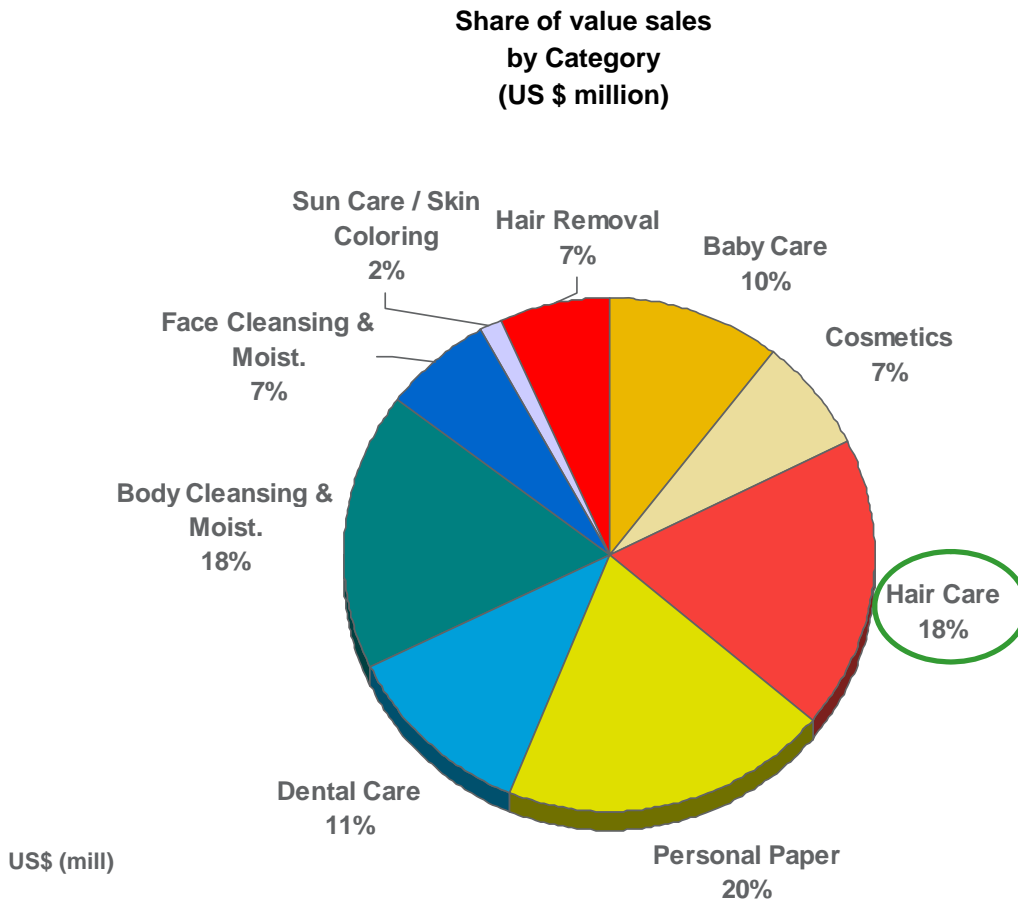


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Consumer Study Theme 1: Investment in Hair, Skin Care

The March consumer survey indicated that consumers were very concerned with investing in hair care and skin care regimens. This *What's Hot* study confirms that consumers do indeed invest in hair care products. In fact, it is the number-two largest category in terms of value sales (behind Personal Paper, tied with Body Cleansing). This would indicate a significant willingness to follow a hair care regime.



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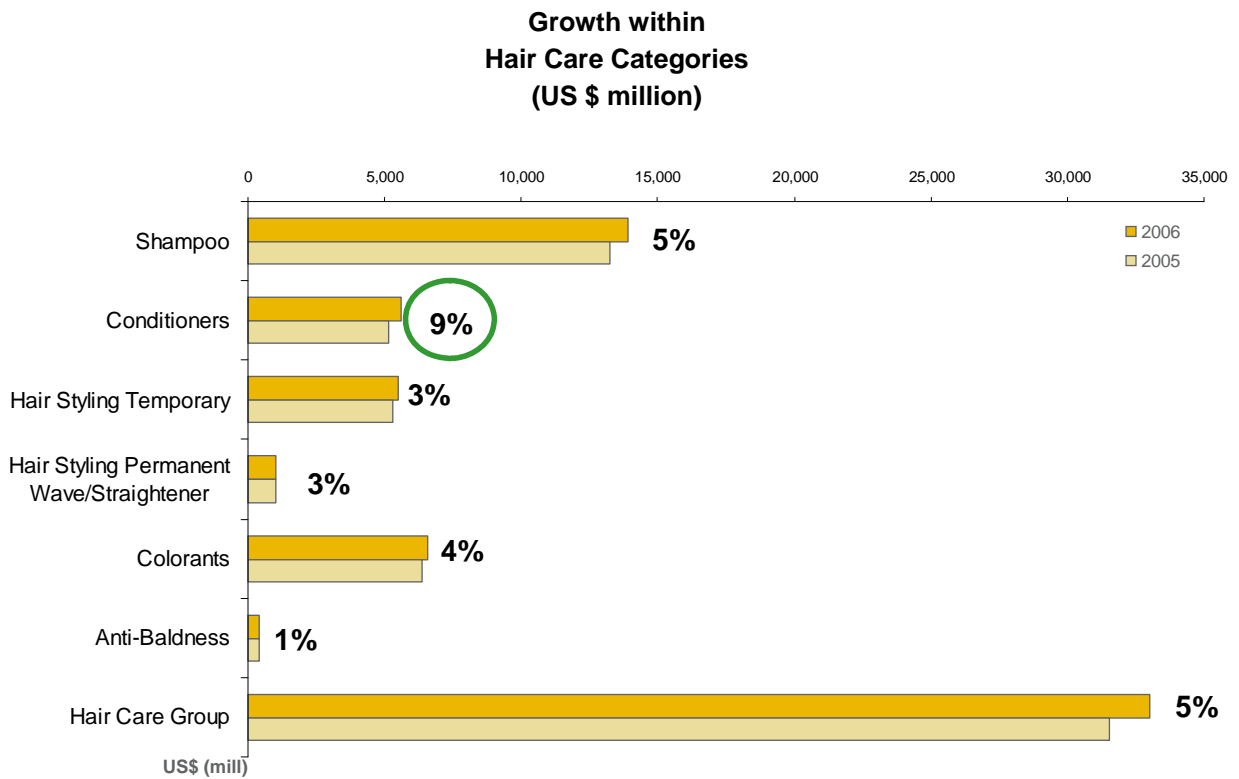


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Consumer Study Theme 1: Investment in Hair, Skin Care

Taking a closer look at the categories within the hair care group, all categories showed year-over-year growth, with hair conditioners being an item of significant growth, again confirming consumers' interest in good grooming.



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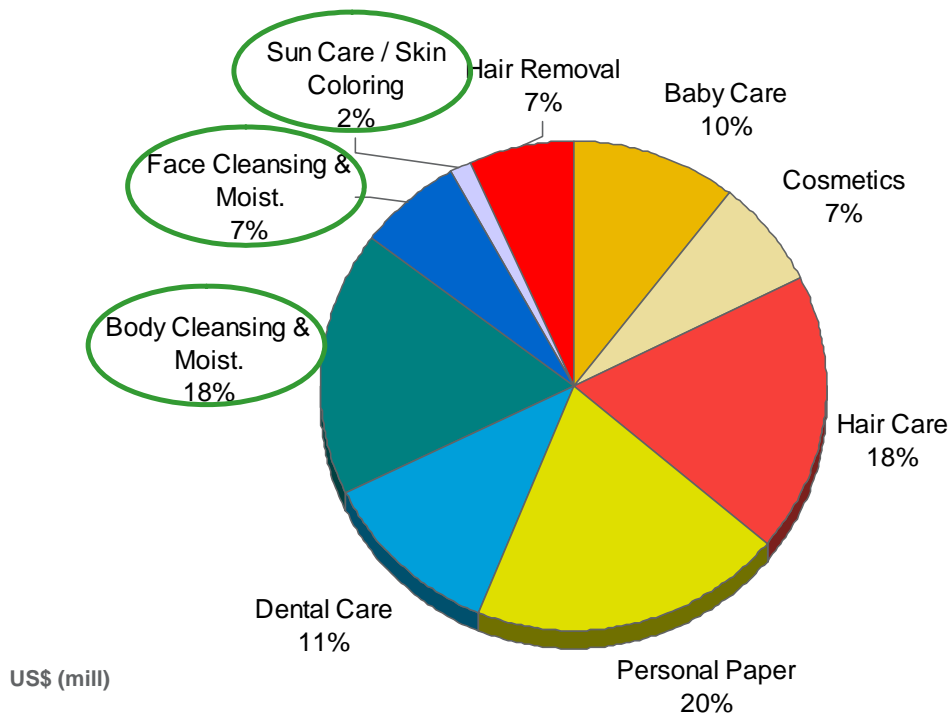


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Consumer Study Theme 1: Investment in Hair, Skin Care

Skin care is another important element to consumers, and a large portion of consumer spending. When looking at the *What's Hot* study, it also confirms a consumer investment in skin care products. When combining the product groups related to a skin care regimen, we can see a healthy portion of overall dollars are spent on this area – almost 30% of total consumer spending.

Share of value sales
by Category
(US \$ million)



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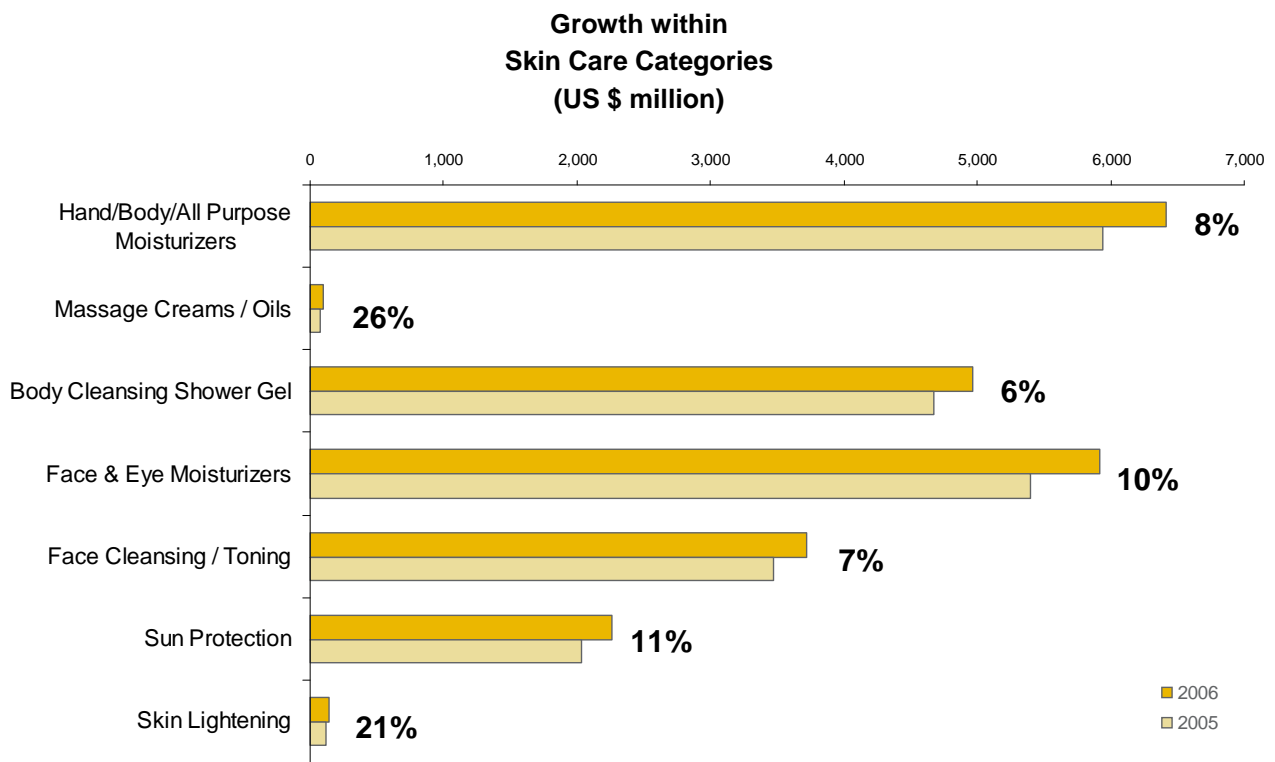


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Consumer Study Theme 1: Investment in Hair, Skin Care

Again, looking deeper within the product groups of Face and Hand/Body Moisturizers, as well as Skin Coloring/Sun Protection, many of these categories also show very strong growth. Four of these categories: Massage Creams/Oils, Face & Eye Moisturizers, Sun Protection, and Skin Lightening all appeared on the list of fastest-growing categories overall.



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Consumer Study Theme 2: Cultural pressures to look good

The second theme that appeared in the consumer *Health, Beauty & Personal Grooming* report was that consumers in certain markets reported feeling pressure to look their best all the time. The top-ranking markets in this aspect were Greece, Brazil and Portugal. On the other end of the spectrum, consumers in Hong Kong, Norway, New Zealand and the US reported the least pressure to have to look good at all times.

So, do countries who feel more pressure to look good show higher incidences of products designed for beauty? Comparing these markets showed some interesting results. The markets as having consumers feel the greatest pressure to “look good” showed some categories related to beauty that had high levels of growth. However, other categories were also high-growing.

**Top Growing Categories
by Selected Market**

Global	Greece	Portugal	Brazil
Massage Creams / Oils 26%	Self-Tanning 375%	Lip Moisturizers 60%	Depilatories 22%
Specialist Cleansing - Hand 22%	Skin Lightening 31%	Denture Fixatives 26%	Personal Moist Wipes 19%
Skin Lightening 21%	Incontinence Pads/Pants 17%	Depilatories 22%	Sun Protection 14%
Disposable Changing Mats 15%	Cotton Wool 15%	Facial Cosmetics- Blush/Concealer/Found 17%	Diaper/Nappy Rash Cream 14%
Mouthwash/Oral Rinses/ Antiseptics 12%	Conditioners 13%	Face & Eye Moisturizers 15%	Mouthwash/Oral Rinses/ Antiseptics 13%
Sun Protection 11%	Aftersun 11%	Sun Protection 12%	Disposable Diapers 12%
Incontinence Pads/Pants 10%	Mouthwash/Oral Rinses/ Antiseptics 10%	Conditioners 11%	Colorants 11%
Face & Eye Moisturizers 10%	Baby Moist Wipes 10%	Incontinence Pads/Pants 10%	Sanitary Protection 10%
Baby Moist Wipes 9%	Depilatories 10%	Perfume/Cologne 10%	Face Cleansing / Toning 10%
Conditioners 9%	Lip Moisturizers 8%	Mouthwash/Oral Rinses/ Antiseptics 9%	Aftershave 10%

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Consumer Study Theme 2: Cultural pressures to look good

By taking a look at the markets where consumers reported not feeling as much pressure to look good all the time, one can see that there was also strong purchasing growth in certain beauty categories, indicating that feeling pressure to look good may not be a sole indicator of strong purchasing of these products.

**Top Growing Categories
by Selected Market**

Hong Kong	New Zealand	Norway	US
Aftersun 30%	Cosmetic Removers - Eye/Face/Nail 61%	Cosmetic Removers - Eye/Face/Nail 25%	Massage Creams / Oils 80%
Baby Moist Wipes 16%	Denture Fixatives 25%	Denture Cleansers 25%	Disposable Changing Mats 60%
Depilatories 12%	Soothers - Pacifiers/Dummies 17%	Colorants 15%	Specialist Cleansing - Hand 55%
Tooth Cleaning 11%	Tooth Stain Removers/ Whiteners 17%	Sun Protection 12%	Body Cleansing Shower Gel 35%
Sun Protection 11%	Hand/Body/All Purpose Moisturizers 17%	Facial Cosmetics 9%	Soothers - Pacifiers/Dummies 15%
Mouthwash/Oral Rinses/Antiseptics 9%	Mouthwash/Oral Rinses/Antiseptics 15%	Toilet Tissue 8%	Baby Moist Wipes 12%
Aftershave 9%	Lip Cosmetics 13%	Body Cleansing Shower Gel 8%	Conditioners 10%
Personal Moist Wipes 8%	Face & Eye Moisturizers 11%	Personal Moist Wipes 6%	Sun Protection 9%
Toothbrushes 8%	Diaper/Nappy Rash Cream 10%	Razors & Blades 6%	Eye Cosmetics 8%
Deodorants 7%	Baby Moist Wipes 10%	Toothbrushes 6%	Hand/Body/All Purpose Moisturizers 7%

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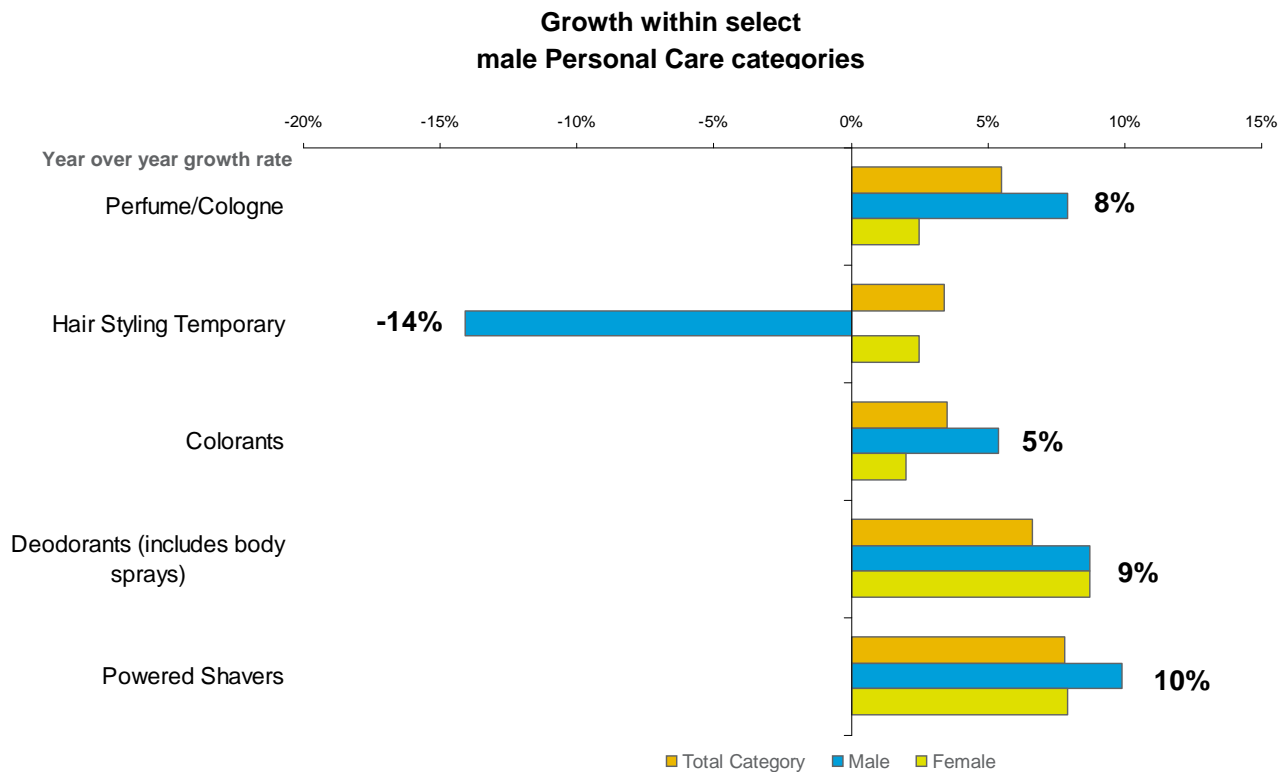
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Consumer Study Theme 3: Male grooming, beauty care gaining acceptance

In the recent consumer survey, the concept of male grooming and beauty care was seen as acceptable, as more than four in five surveyed agreed that men are more interested in personal grooming than they used to be. This *What's Hot* study covered sales in categories including perfume, hair colorants and deodorant showed, related specifically to males.

In four out of five of these categories, male items showed strong growth, in many cases outpacing the year-over-year growth of female-targeted items. Only Temporary Hair Styling showed a decline. This would seem to confirm the general mainstream acceptance of male beauty care items.



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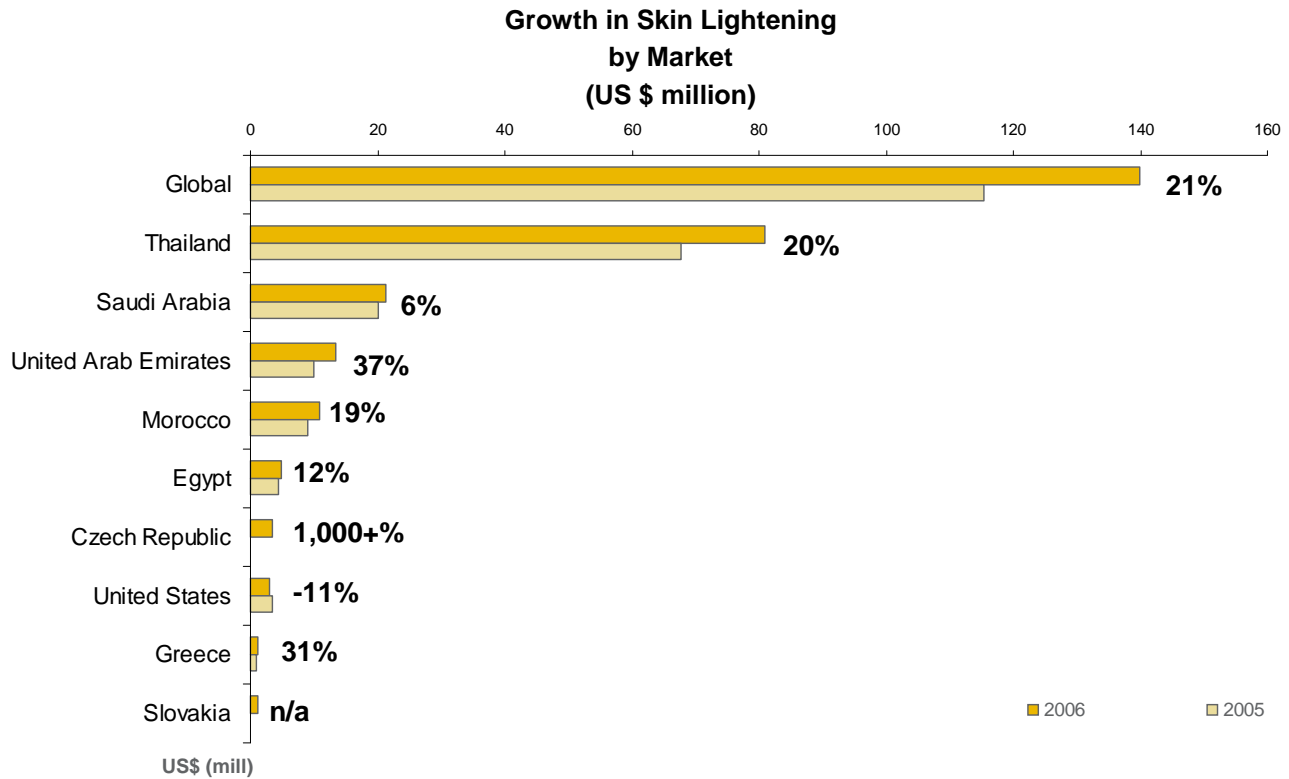
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Consumer Study Theme 4: Skin Lightening a new and growing category

Asia was touted in the recent *Health, Beauty & Personal Grooming* survey as being a place where skin lightening products are popular. The available data collected for this Personal Care study only collected information from one Asian country, but it was growing at 20%, providing a measure of confirmation on the consumer trend. Growth was also shown in the EEMEA markets that measured the category as well. The US was the only market to decline from the prior year.

Interestingly, the Czech Republic and Slovakia showed growth in this category, although the Czech Republic number is large growth on a very small base, going from virtually nonexistent in the prior year. The same is true with Slovakia, which went from having no sales in the prior year.

The reason given in the consumer survey for the popularity of this category in Asia is that traditionally, darker skin has been associated with people who work outdoors, and lighter skin is considered more sophisticated and urbane. Perhaps this is a trend that is also growing with consumers in regions beyond Asia.



What's Hot around the Globe



Insights on Growth in Personal Care Products

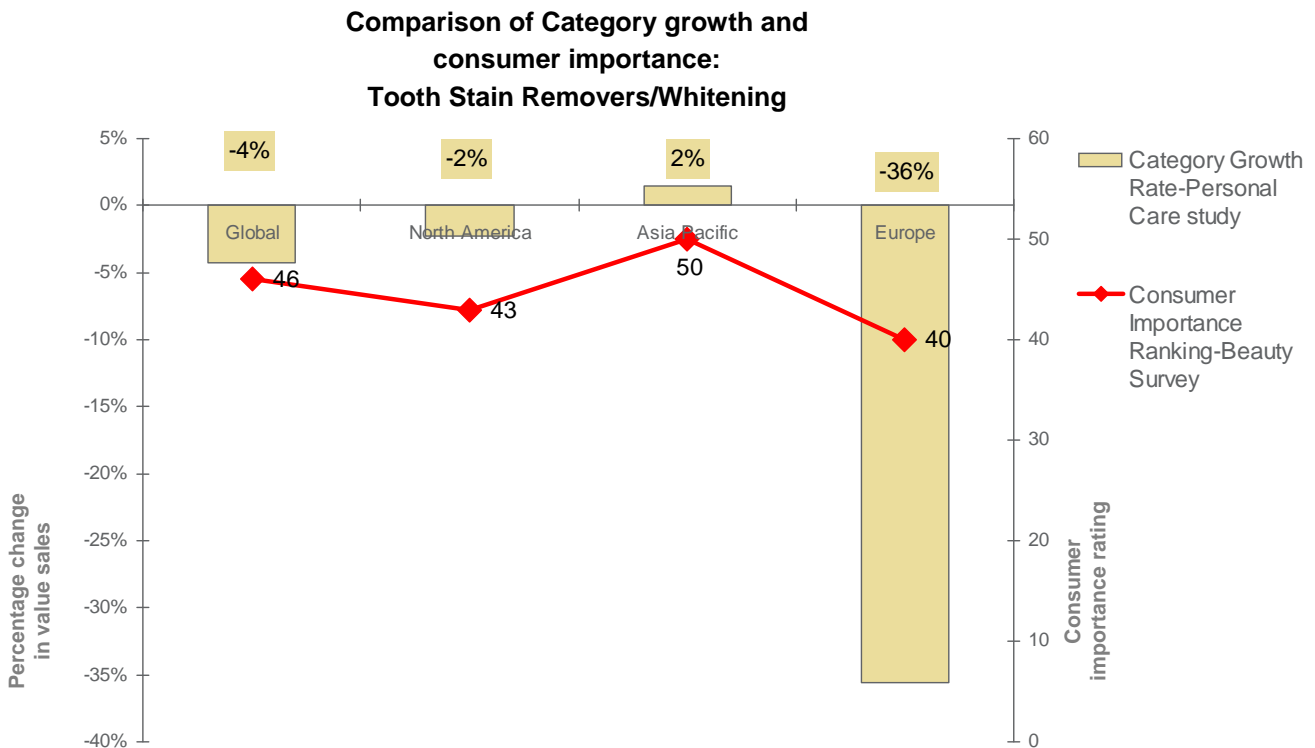


Consumer Study Theme 5: Ultimate indulgences - Massage, Teeth Whitening

Consumers in the March survey cited massage as an “ultimate indulgence”, something to spend more on if money were no object. And looking at purchase data, it also seems as if consumers are looking to indulge even if it is in the home: the purchase of Massage Creams and Oils increased significantly year-over-year, raising it to the number-one growth category in Personal Care.

On the other hand, tooth whitening did not show a similar trend to the last Personal Care study (2003). This runs counter to the *Health, Beauty & Personal Grooming* consumer attitude survey. Looking further into this issue, markets such as Hong Kong noted a decrease in distribution of whitening products, and France noted a decline due to consumers wanting stronger whitening programs than were sold over the counter. Some of the decline could be due to consumers switching to dentist-supplied programs.

However, when comparing consumer attitudes to product sales on a regional basis, tooth whitening products do align somewhat in terms of consumer attitudes of its consumer importance and relation to category growth rates. This shows that the desire for these types of products does fluctuate regionally, and that consumers may still want the indulgence of a brighter smile despite the current decline.





**What's
Hot around
the Globe:**

Insights on
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Regional
Growth

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What's Hot around the Globe

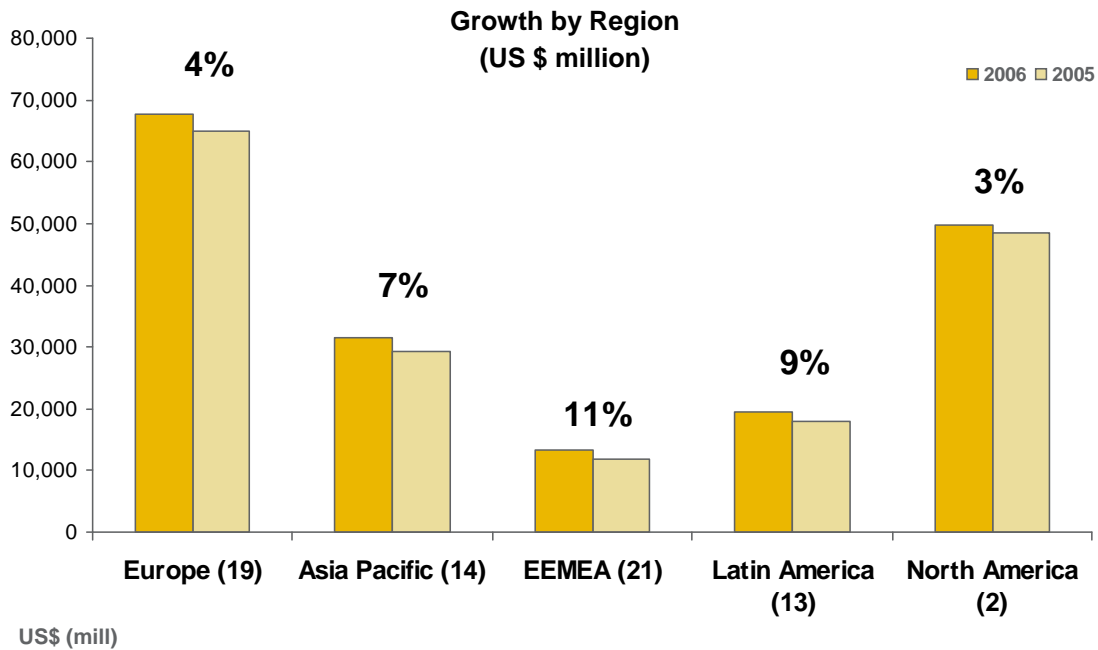


Insights on Growth in Personal Care Products

Regional Growth

Overall growth is positive and is higher in smaller regions

The regional trends in Personal Care products are fairly consistent with what has been seen in other studies. The larger regions such as Europe and North America spend the most on Personal Care items from year to year, but are growing at a slower rate. In contrast, the Latin America and EEMEA markets show smaller annual value sales, but a larger year-over-year increase, demonstrating their potential. Asia Pacific is a mix of developed markets (such as Japan and Australia) and newer, developing markets (China, India), which provides a mix of high and low growth.



What's Hot around the Globe



Insights on Growth in Personal Care Products

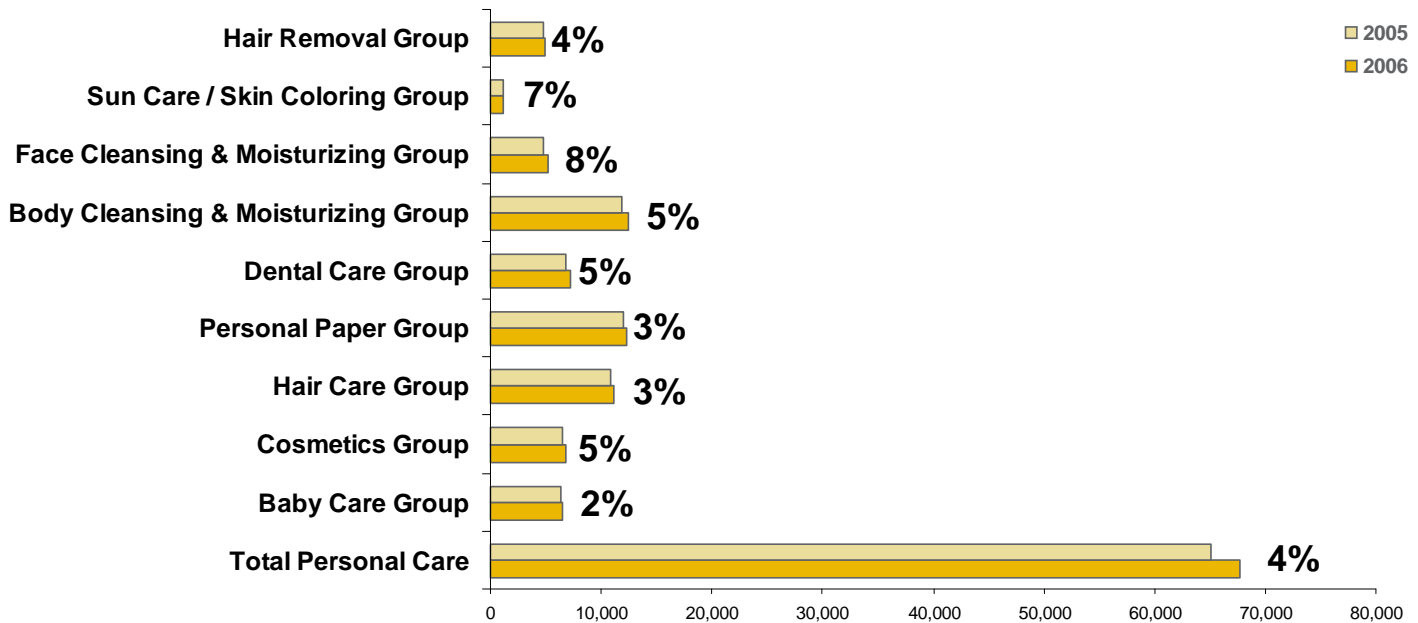
Regional Growth Europe

Europe grew by 4%, in total, fueled by growth in Body and Face Cleansing & Moisturizing. These two product areas provided the largest value concentration to overall growth, which takes into account both size of the category as well as the growth rate within.

There were only two product areas growing faster than the global average: Cosmetics and Face Cleansing & Moisturizing. Denmark showed strong growth across several Cosmetics categories, and Italy showed significant growth in Perfume/Cologne (+46%), due to the expanded distribution of products from perfumeries to more mass market retailers. Growth in Facial Cleansing group was dominated by smaller markets showing large growth including Czech Republic, Slovakia and Poland (all growing at +20%)

The fastest-growing product group was Sun Care/Skin Coloring, which was impacted by two things: a large increase in Sun Protection purchases in Northern Europe (Sweden +30%, Belgium and Denmark +29%, Netherlands +20%) and an increase in Self-Tanning products in Switzerland (+41%), Belgium (+40%), Italy (+24%) and France (+21%). In particular, the France market was quite large, which added a significant dollar amount in terms of overall value growth.

**Growth by Product Area
Europe
(US \$ million)**



What's Hot around the Globe



Insights on Growth in Personal Care Products

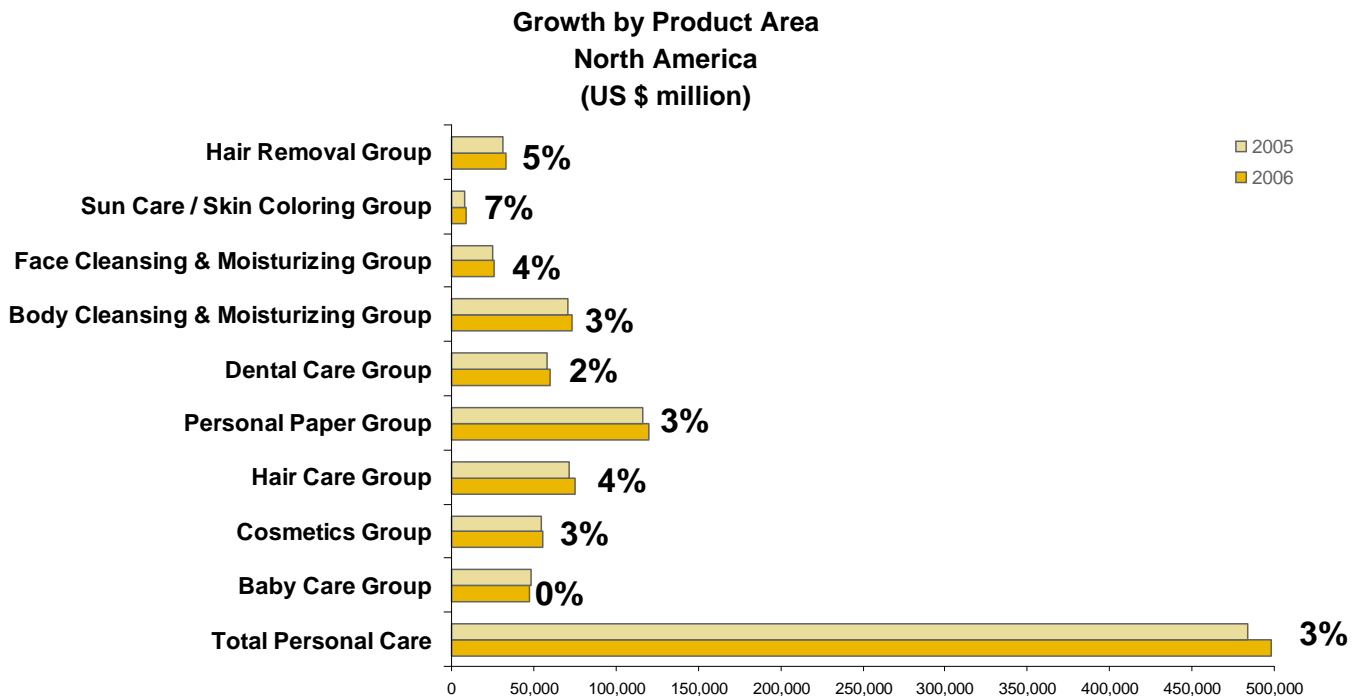
Regional Growth North America

North America, as with Europe, saw smaller year-over-year changes, despite being larger in terms of global share. Containing some of the largest developed markets, these regions show less value growth annually. In North America, there was no one product area that was growing faster than its global average.

Within that framework, however, there are still some categories that stand out. In North America it was the Sun Care group, driven almost exclusively by Sun Protection products (+10%). Interestingly, Aftersun products and Self Tanning products showed declines, perhaps indicating that consumers were becoming more concerned with taking care of their skin rather than going for that "healthy glow".

Both Personal Paper and Hair Care product areas showed large contributions to growth in terms of value sales, fueled by product such as toilet tissue, shampoo and conditioner.

Hair Removal was at the same level as the global average, fueled by increases in razors and blades and powered shavers.



What's Hot around the Globe



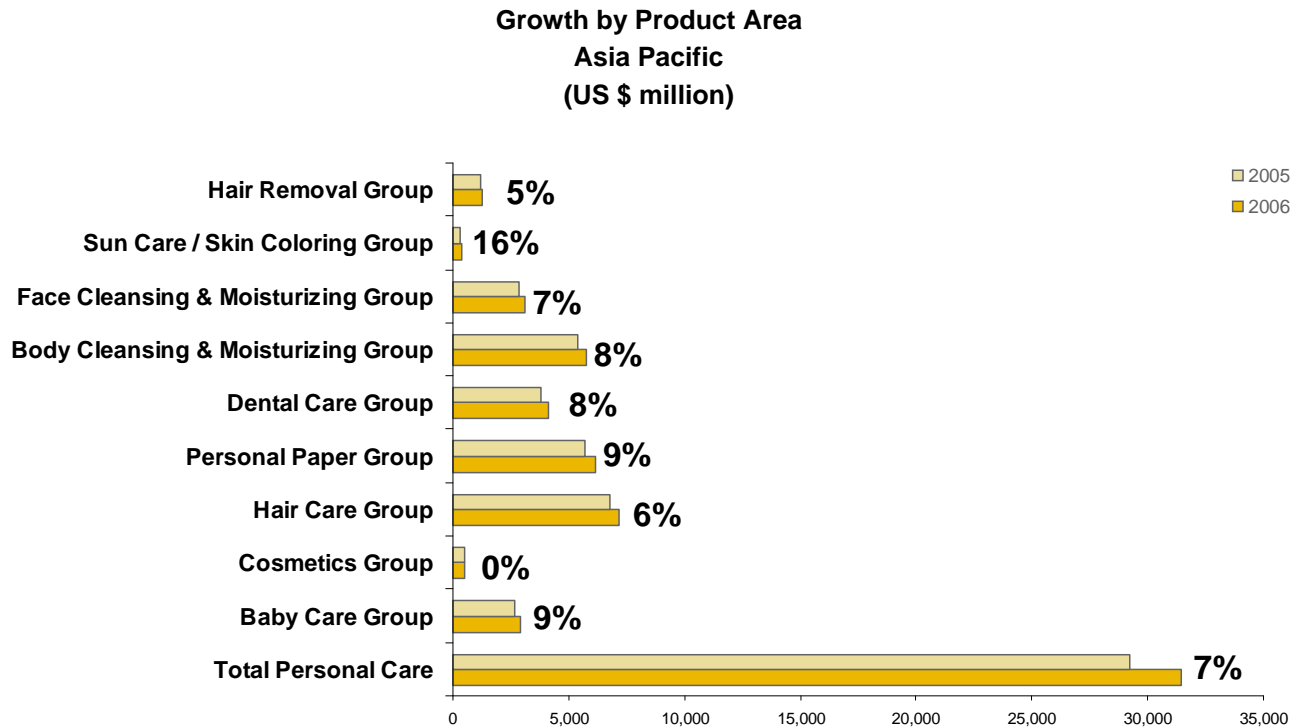
Insights on Growth in Personal Care Products

Regional Growth Asia Pacific

Asia Pacific showed strong growth overall, ranging from total Personal Care growth in India of 19% to a slight year-over-year decline of 2% in South Korea, averaging out to 7% across the region. This further emphasizes the point that Asia Pacific is probably the most diverse regions in terms of size, cultures and consumers. Leading this growth across the region, Body Cleansing & Moisturizing and Personal Paper contributed the most in terms of value sales to this growth, which takes into account both size of the category as well as the growth rate within.

The Sun Care / Skin Coloring group was the fastest growing category overall within the region. This was due almost entirely to consumers purchasing Sun Protection products, which showed double-digit growth in all the markets measured, with the exception of New Zealand, which actually showed a small decline (-1.6%) due to an unseasonably cold summer in 2006.

Personal Paper is another fast-growing product group in the region. The markets of India (+18%) and China and Australia (+14% each) showed significant growth and contribution to the regional total. Within the group, Toilet Tissue was a large and growing category, growing in every market measured in the region. Finally, Incontinence Pads grow at a brisk 14% on an already large base in Japan, highlighting the needs of the aging population there.



What's Hot around the Globe



Insights on Growth in Personal Care Products

Regional Growth Latin America

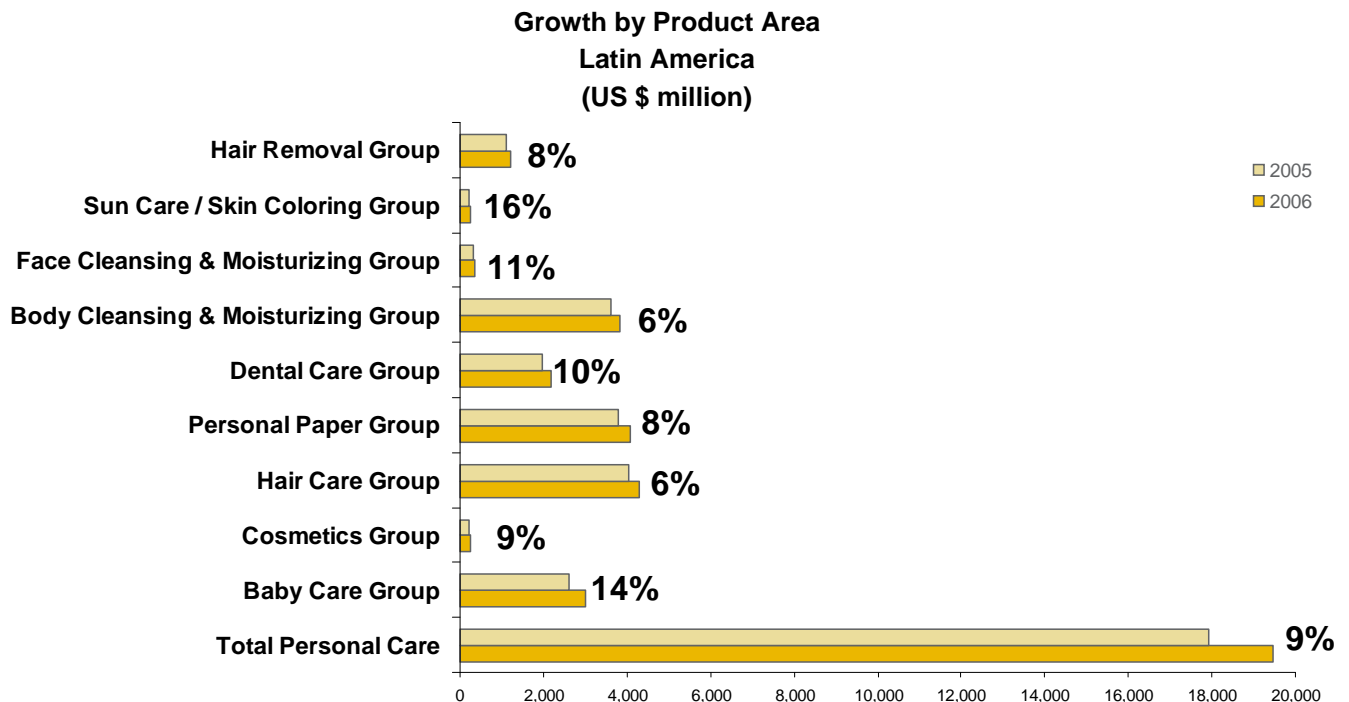
Latin America showed healthy growth across all categories and positive trends with all the markets within the region, with the exception of Guatemala. The economic recovery in Venezuela was reflected in the more than 33% growth in Personal Care value from the prior year.

By far, the largest contributors to regional and global trends in terms of value sales were Brazil and Mexico, accounting for 5% and 3%, respectively, of total global share of Personal Care products.

In Latin America, the Baby Care group, growing at 14%, accounts for the largest value contribution within the region. Every category measured within Baby Care is growing in double digits in Latin America as well. The existence of many younger populations in this part of the world makes this fact not surprising.

However, it is important to note that some products for older consumers were also on the rise. Notably, Incontinence Pads / Pants showed double-digit growth in Venezuela (+45%), Argentina (+24%), Puerto Rico (+19%) and Mexico (+16%). Clearly, the population is not entirely young.

Perhaps not surprising, given much of Latin America's population lives in warm climates, is that the fastest growing group is Sun Care/Skin Coloring. The Sun Protection category also drives this product group in Latin America, showing strong positive sales in every market measured.



What's Hot around the Globe



Insights on Growth in Personal Care Products

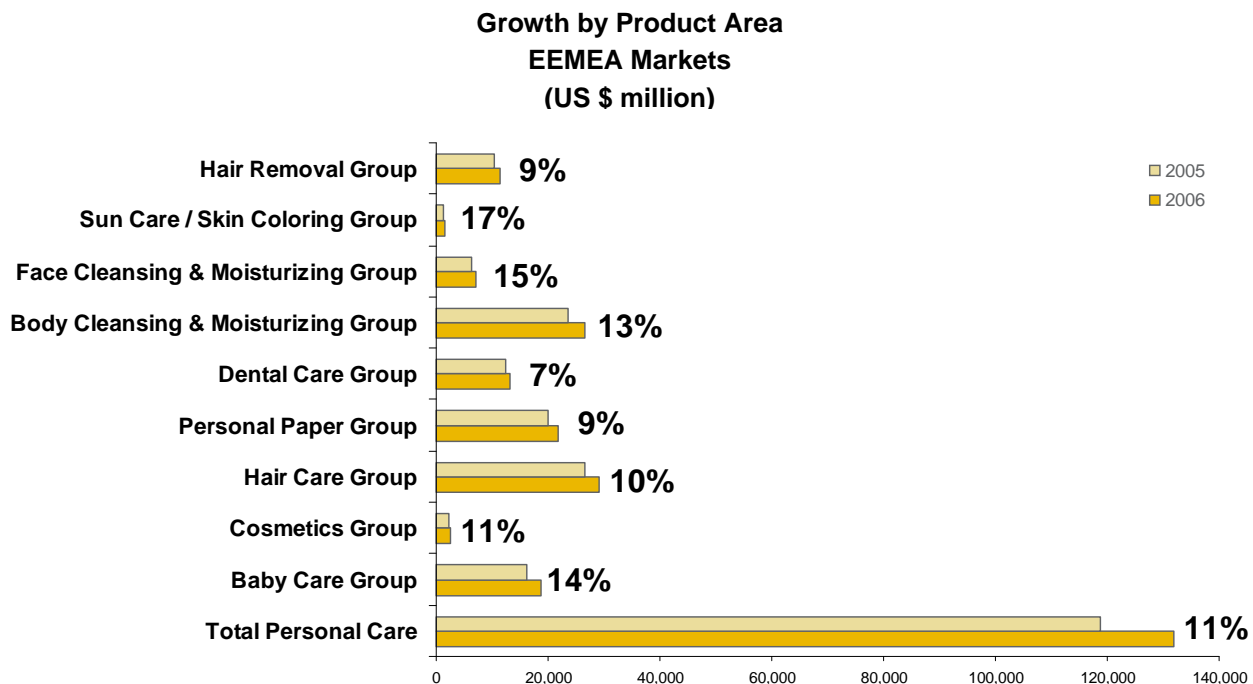
Regional Growth EEMEA Markets

Even though many of the markets in EEMEA are relatively small, they are registering large growth rates. As new items become available – and development of retailing infrastructure in these markets continues – consumers will continue to seek out and try products that enhance their overall feelings of health and well-being.

The fastest growing categories within this region included Massage Oils, Hair Styling and Cosmetics. When looking at these categories, it is clear that consumers will look for new and different products – including beauty and “indulgence” items – regardless of where they are around the world.

Convenience also plays a role just like elsewhere around the world, with items such as Baby Moist Wipes (+24%), Personal Moist Wipes (+17%) and Body Cleansing Shower Gel (+17%) showing growth higher than the regional average.

As can be seen from the above category growth, Body Cleansing & Moisturizing provided the highest value contribution to the growth, taking into account both category size and growth rate. As with Latin America, Sun Care was the fastest growing category. Sun Protection products were again the item fueling the growth in this region, again highlighting the importance that consumers are placing on protecting their skin.





What's Hot around the Globe:

Insights on
Personal Care
Products

Product
Area
Highlights

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What's Hot around the Globe



Insights on Growth in Personal Care Products



Product Area Highlights

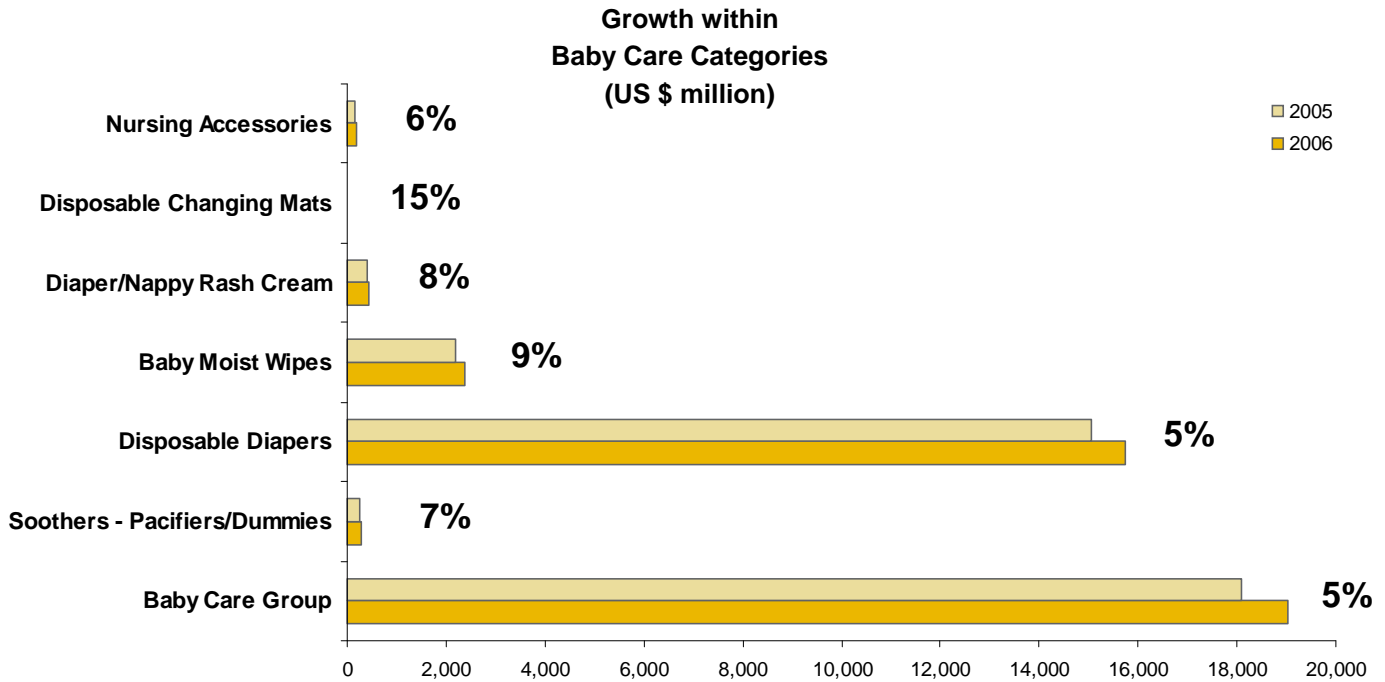
Baby Care Categories

Global Growth: 5%

Convenient items drove growth in the Baby Care product area. As time becomes more valuable for parents, the need for quick and easy-to-use products positively impacts the growth in these categories. Disposable Diapers – a convenient way to change a baby – grew at the category average. Many of the fastest growing markets for diapers, not surprisingly, were larger developing markets in Asia such as India (+28%) and China (+31%); however, Argentina (+40%) and Venezuela (+29%) were also fast-growing large markets for this category.

Other items, such as Disposable Changing Mats and Baby Moist wipes also showed strong growth. These two categories also demonstrate our desire for convenience. Baby Moist wipes grew by 9%, with large growth coming from Venezuela, Australia and Turkey.

Finally, Disposable Changing Mats saw growth of +15%. Although the product was only listed in 2 markets, this growth indicates it is filling a strong consumer need in these markets. Clearly, within the Baby Care group, as consumers' incomes increase, they act out their desire to have the best for their children as they save time and effort where they can.



What's Hot around the Globe



Insights on Growth in Personal Care Products



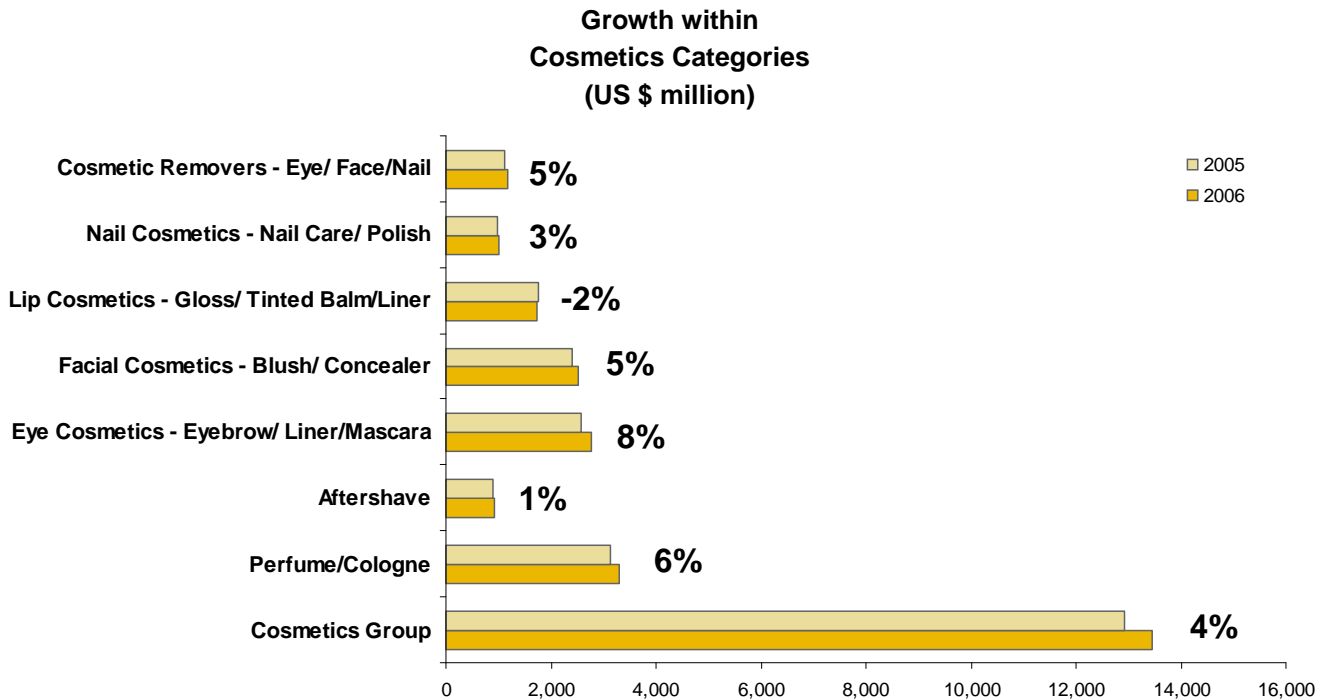
Product Area Highlights

Cosmetics Categories

Global Growth: 4%

The Cosmetics group showed positive growth in all but one category. However, this product group showed slower overall growth than the global average. Strong performers in this product group were Eye Cosmetics, which gained value sales primarily due to price increases and increased sales overall from private label; and Perfume/Cologne, which was helped in part by a wider distribution in markets like Italy, moving from perfumeries to the mass market retailers.

The decline in Lip Cosmetics is influenced by overall declines in some larger markets including the US, France, Germany and Switzerland. When looking at the growth in private label within this category, both the US and France showed significant growth in this category, while Germany and Switzerland declined with the overall category. It is possible within the US and France that the overall purchase price may be declining, which could account for this trend. More analysis within these markets is needed to confirm this, however.



What's Hot around the Globe



Insights on Growth in Personal Care Products



Product Area Highlights

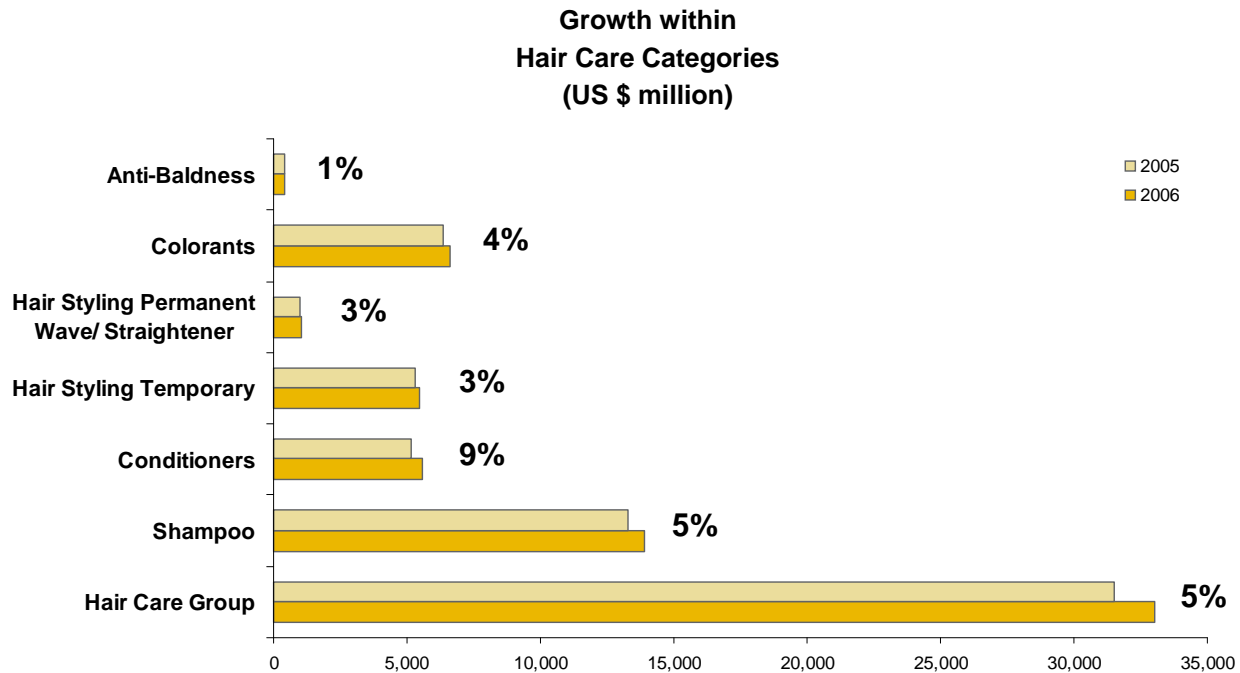
Hair Care Categories

Global Growth: 5%

As stated earlier, the Hair Care product area showed good growth, fueled by the Shampoo & Conditioner categories. A consumer focus on good hair grooming is part of this; in addition, there was strong growth in some of the Eastern markets in Europe, including Poland (+18%) and Czech Republic (13%).

Italy showed growth in Conditioners at just 5%, but contributed a significant amount in terms of value sales due to the size of the market there. Increases there were linked in part to the increase in "leave-in" conditioners, which were manufacturer-branded items that did not have a private label counterpart.

Private label was a big driver elsewhere in Shampoo and Conditioners, with Spain being a large contributing factor to overall private label growth in these categories. This was due to increased development by the retailer of private label categories, along with better assortment.



What's Hot around the Globe



Insights on Growth in Personal Care Products



Product Area Highlights

Personal Paper Categories

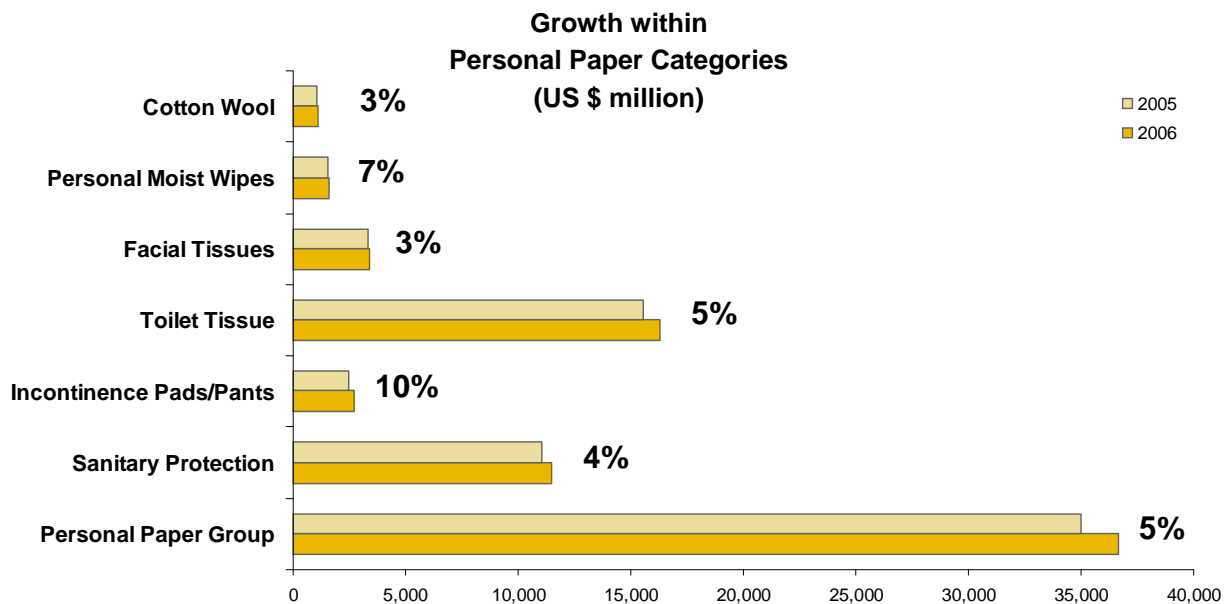
Global Growth: 5%

As stated earlier in this report, the growing mature population around the world has impacted the purchase in Personal Paper categories such as Incontinence Pads/Pants. This influence may continue for some time globally.

The largest markets in terms of value sales for Incontinence Pads/Pants were the US, Germany, France and Spain. All of these markets were showing positive growth as well. In fact, this category was not only one of the top-growing categories year-over-year, but it was also the only top category that was growing in every market measured.

Consumer desire for convenience was also demonstrated in this product group, as Personal Moist Wipes were growing above the overall group average. The US (+5%), Japan (+10%), Spain (+10%) and Germany (+8%) were the largest markets for this category. Other smaller markets – including Mexico, Romania and Colombia – all showed growth of more than 100% from the prior year.

Both Toilet Tissue and Sanitary Protection categories, while not growing faster than the category overall, did show some growth in quite a few developing markets. For example, Russia (+46%) and Venezuela (+33%) were large, fast growing categories in Toilet Tissue and China (+14%) and India (+18%) were two of the largest and fastest growing categories in Sanitary Protection.



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Product Area Highlights

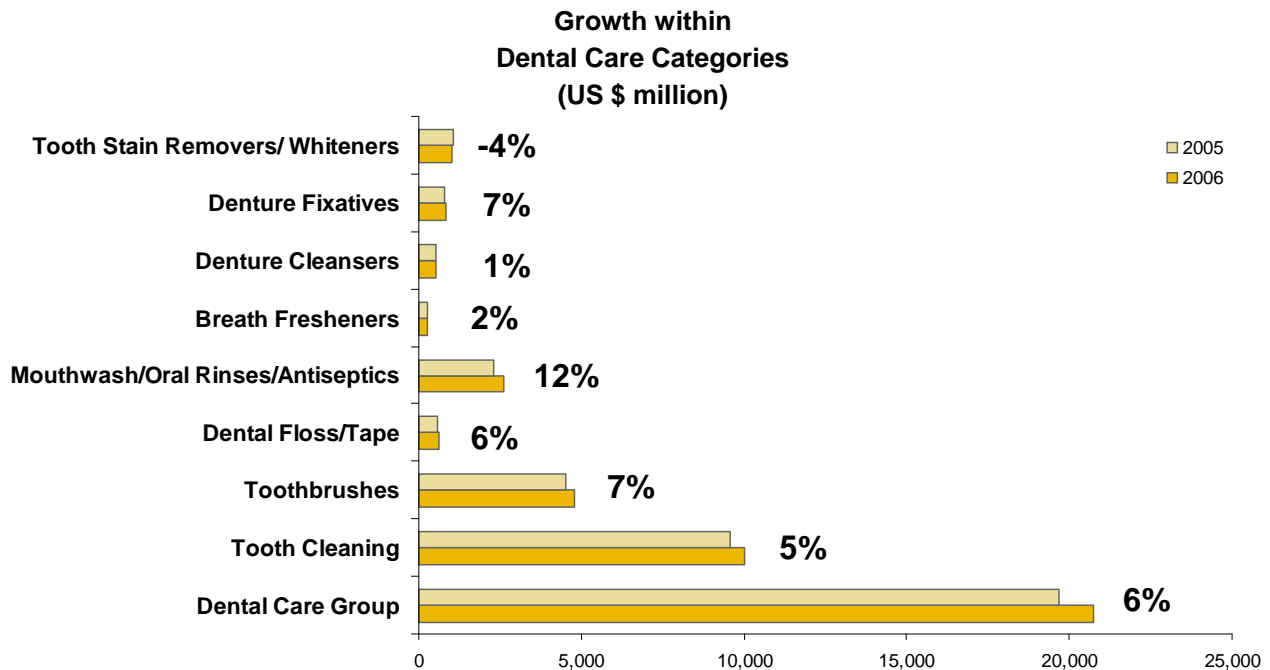
Dental Care Categories

Global Growth: 6%

Teeth whitening kits and strips are on a *decline* globally. Could this be the end of a trend? In some markets, the decline is attributed to the natural leveling off of a previously fast-growing category. In a few markets, such as Hong Kong (-46%) and France (-47%), it was also noted that there was decreased distribution overall.

On the brighter side, Mouthwash/Oral Rinses/Antiseptics grew at twice the group average, fueled by new product introductions in some markets such as Great Britain (+15%), and a reported increase in focus on oral care in Japan (+23%). This category seems to be one where manufacturer branded items are taking the lead, as noted in several markets, and also highlighted by the fact that private label was growing at just 7% year over year.

While Denture Cleansers were not a large growth category, Denture Fixatives were, which is another indicator of a growing aging population. Australia, Portugal, New Zealand and Great Britain all showed year over year growth in this category of more than 20%.



What's Hot around the Globe



Insights on Growth in Personal Care Products



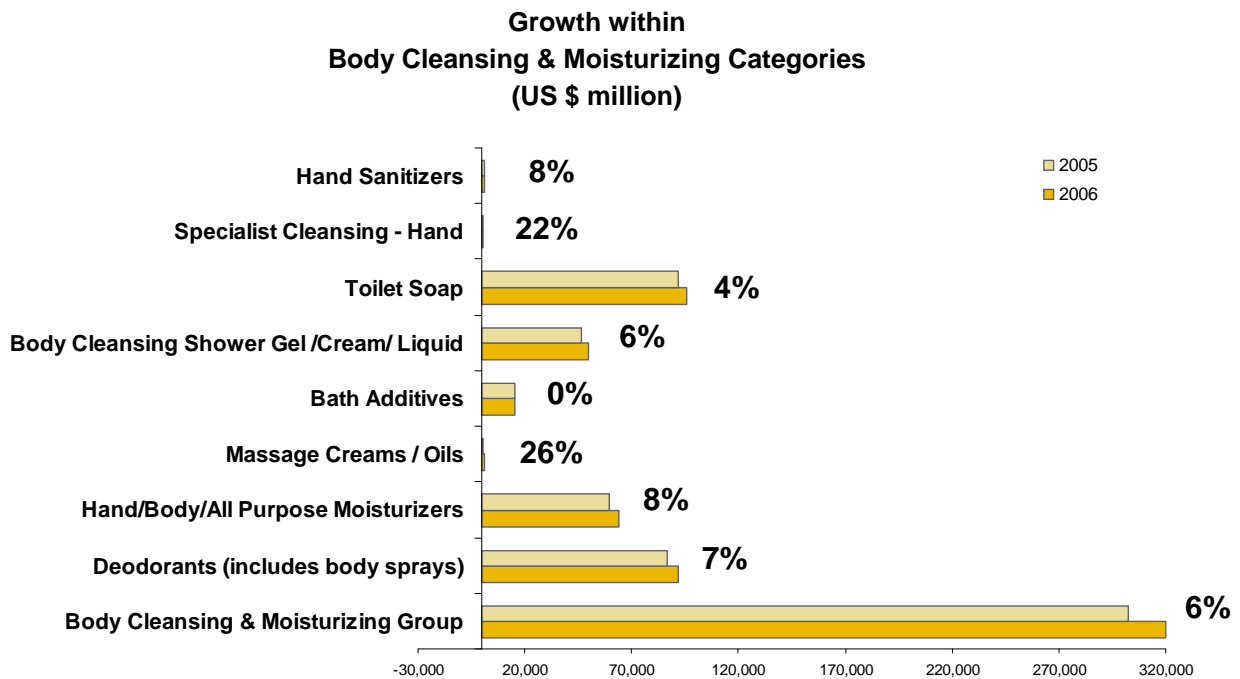
Product Area Highlights

Body Cleansing & Moisturizing Categories

Global Growth: 6%

As stated earlier, Massage Creams/Oils were the fastest growing category overall, and Specialist Cleansing – Hand products also made the list. However, looking at the product group below, these are small categories compared to Deodorants and Hand/Body/All Purpose Moisturizers, which helped drive overall growth in the product group.

It is interesting to note the faster growth of gel soaps such as the Body Cleansing Shower Gel, as compared to Toilet Soap. In some developing markets, this is even more the case. For example, in Ukraine the growth of Gel is 79% compared to 17% growth in Toilet Soap. Other markets where this is the case include Egypt (52% vs. 11%), Romania (50% vs. 8%) and Mexico (48% vs. 0%). This again demonstrates how consumers desire more convenience in their daily lives, even in markets that are smaller or less developed.



What's Hot around the Globe



Insights on Growth in Personal Care Products



Product Area Highlights

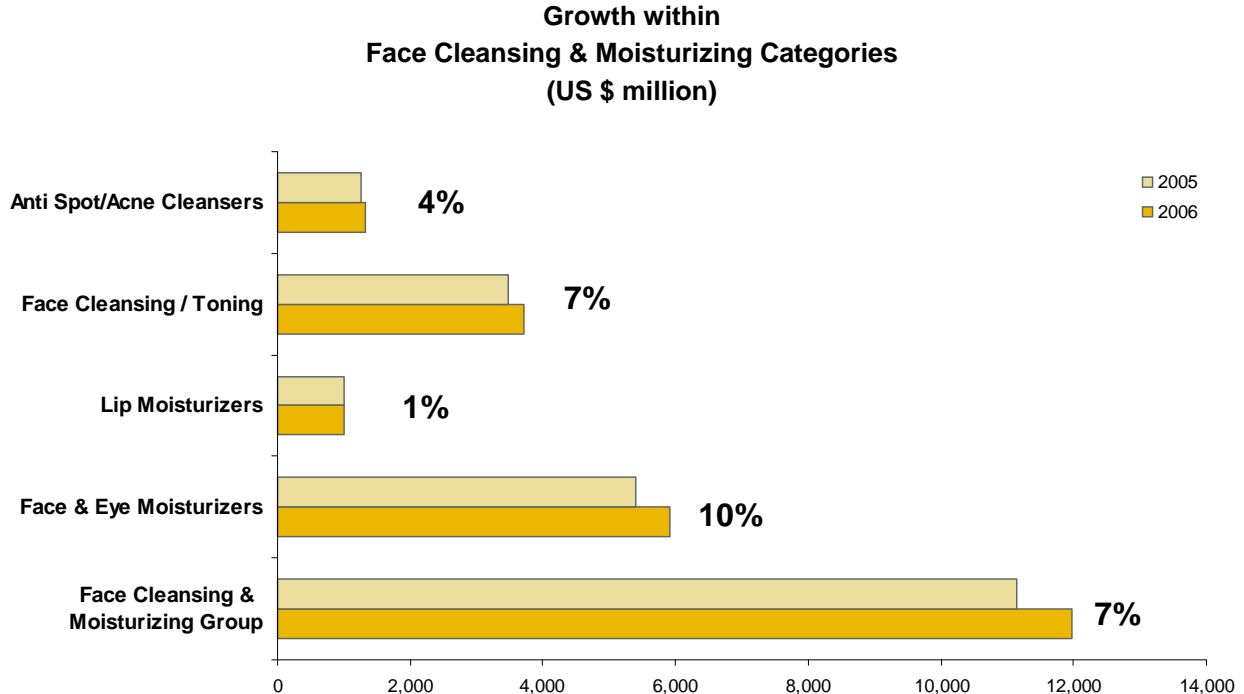
Face Cleansing & Moisturizing Categories

Global Growth: 7%

The importance of skin care to consumers was also highlighted in the Face Cleansing & Moisturizing group. Face & Eye Moisturizers, another category growing at twice the global average across Personal Care products, was also the largest category within this group. Much of the growth in this category is due to strong manufacturer marketing, and new product introductions relating to anti-aging and anti-wrinkle capabilities.

When considering the markets contributing the greatest amount of value growth, taking in market size and growth percentage, China (+11%) and Spain (+15%) were the top two for Face & Eye Moisturizers.

In terms of Face Cleansing / Toning, it was Japan (+8%) and Great Britain (+11%) contributing the most in terms of dollar value growth. However, markets such as Venezuela, Estonia and Ukraine posted gains of more than 30% year over year.



What's Hot around the Globe



Insights on Growth in Personal Care Products



Product Area Highlights

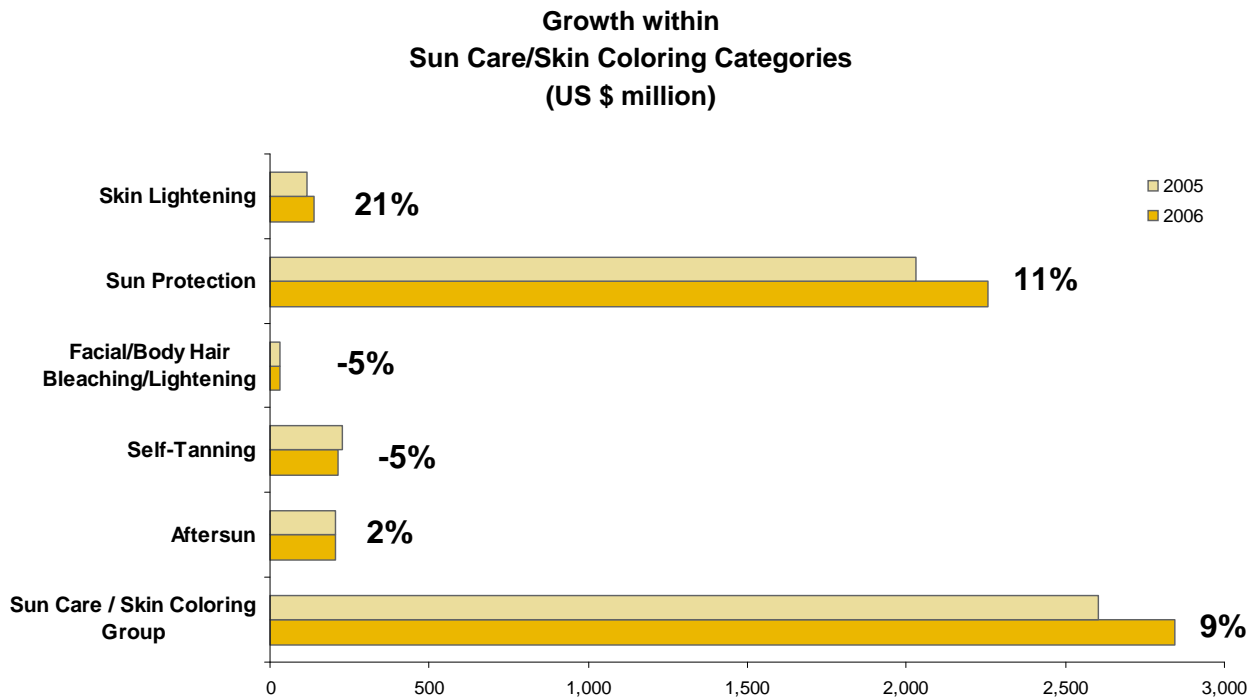
Sun Care/Skin Coloring Categories

Global Growth: 9%

Mentioned throughout this report, the Sun Care/Skin Coloring group of categories is driven mainly by Sun Protection. A greater concern with health, an awareness of environmental changes, and in some cultures, a desire for fairer skin have all combined to make Sun Protection one of the fastest growing categories overall, and by far the largest contributor in terms of value growth to this product area.

Skin Lightening has also been discussed elsewhere in this report as one of the fastest-growing of all categories, in regions around the world.

Perhaps more interestingly was the decline in self-tanning products, as this was not a consistent trend across markets. For some, such as New Zealand (-20%), an unseasonably cool summer season actually caused a decline in this category – perhaps due to consumers realizing they did not need to “keep up” with their tanning counterparts. In other cases, such as in Switzerland (+41%), the introduction of new private label items boosted growth. It is likely a combination of factors that influence this category; however, the changes in climate and weather are likely to impact this category more than others.



What's Hot around the Globe



Insights on Growth in Personal Care Products



Product Area Highlights

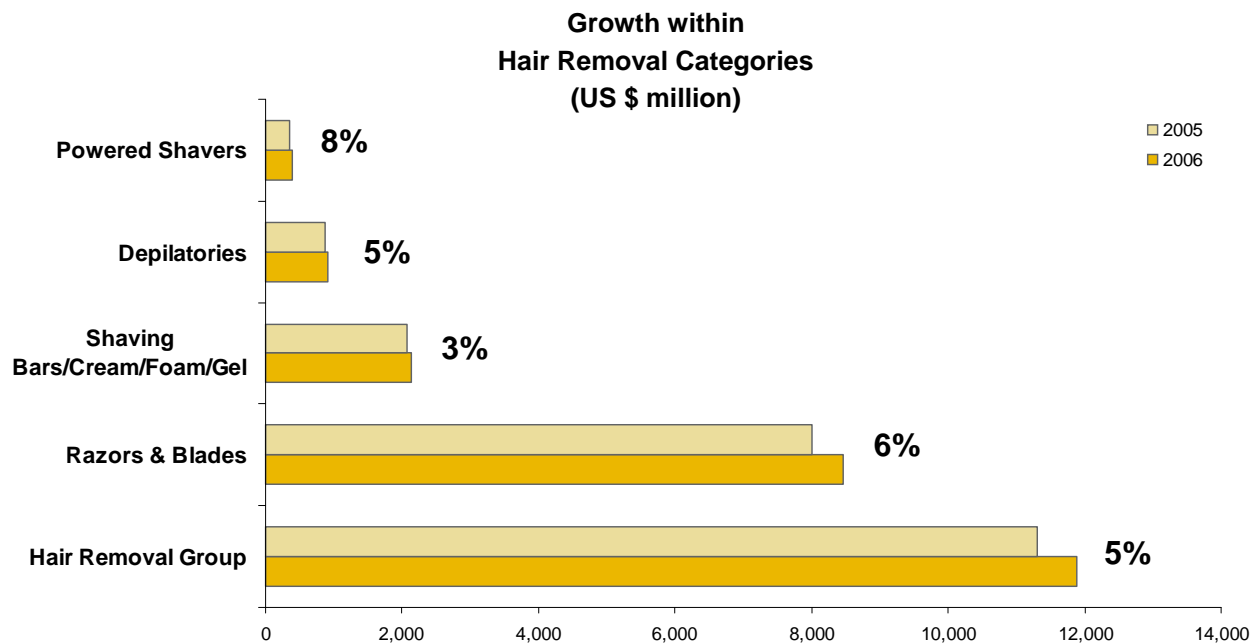
Hair Removal Categories

Global Growth: 5%

The Hair Removal group is dominated by one category – Razors & Blades. Due to its size, as its fortunes go, so do the fortunes of the overall product group. In the past year, Razors & Blades showed healthy growth globally, fueled by increased distribution into new markets, new product introductions, and private label growth in some markets as well.

Two of the fastest growing categories – Venezuela (+34%) and Argentina (+17%) were also large enough categories to be among the top in category growth value for Razors & Blades, which takes into account both growth rate and market size in terms of value sales. Other fast-growing markets for this category included Ukraine, Vietnam, United Arab Emirates, and the Baltic countries of Estonia, Latvia, and Lithuania. All these markets were growing at 20% or more.

Another small but fast-growing category within Hair Removal were the Powered Shavers category. Interestingly, some of the high-growth markets for Powered shavers showed lower-than-average growth in Razors & Blades, or even a decline. For example, Italy showed a 13% growth in Powered Shavers but a decline of 2% in Razors & Blades. Spain also showed strong Powered Shaver growth (11%), but had a lower-than-average growth in Razors & Blades (4%). France also showed this same trend (+6% for Powered Shavers, 0% for Razors & Blades). It remains to be seen if this will become a long-term trend.





What's Hot around the Globe:

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Private
Label
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What's Hot around the Globe



Insights on Growth in Personal Care Products




Private Label Trends

The Top 20 Private Label categories a mix of old and newer categories

Looking at the top 20 categories in terms of private label share, one would think that they would all be considered “commodity” products that have been in market for long periods of time, such as Cotton Wool and Toilet Tissue. However, items like Hand Sanitizers and Skin Lighteners are relatively new categories beginning to show a strong share in private label.

In contrast to the previous study of Food & Beverage products, manufacturer branded items are growing faster than their private label counterparts in eight of the top 20 categories. In fact, some of the most traditional Personal Care items – Cotton Wool, Toilet Tissue and Manual Toothbrushes – are all showing faster manufacturer growth compared to private label. This signals a strong battle between manufacturer and retailer-branded products in these categories, and highlights the importance of manufacturers putting forth a strong brand promise and image to consumers.

Product Area	Category	PL Share	PL y/y growth	Mfr y/y growth	# of PL Countries
Personal Paper	Cotton Wool	47%	2%	4%	26
Baby Care	Baby Moist Wipes	33%	28%	2%	37
Personal Paper	Toilet Tissue	27%	4%	5%	45
Personal Paper	Facial Tissues	26%	3%	3%	39
Personal Paper	Personal Moist Wipes	22%	9%	7%	19
Body Cleansing / Moisturizing	Hand Sanitizers	20%	28%	4%	4
Sun Care / Skin Coloring	Skin Lightening **	19%	287%	21%	1
Dental Care	Manual toothbrushes	18%	3%	6%	40
Personal Paper	Panty liner	17%	5%	5%	38
Sun Care / Skin Coloring	Aftersun	16%	-4%	2%	16
Baby Care	Disposable Diapers	15%	2%	5%	42
Personal Paper	Incontinence Pads/Pants **	15%	10%	10%	21
Dental Care	Toothbrushes	14%	3%	7%	46
Dental Care	Dental Floss/Tape	13%	7%	6%	19
Body Cleansing / Moisturizing	Bath Additives	12%	0%	0%	26
Dental Care	Denture Cleansers	12%	2%	1%	12
Personal Paper	Tampon	11%	8%	1%	26
Cosmetics	Cosmetic Removers	11%	2%	5%	20
Dental Care	Mouthwash/Oral Rinses/Antiseptics	10%	7%	13%	29
Sun Care / Skin Coloring	Sun Protection **	10%	12%	11%	20

 Manufacturer brands growing faster than Private Label

**Fastest Growing Categories

What's Hot around the Globe



Insights on Growth in Personal Care Products

Private Label Trends

Across categories, branded items battled private label

Private label growth was in line with manufacturer growth overall. In contrast to other “What’s Hot” studies, such as What’s Hot in Food and Beverage products, private label did not dominate across product groups. As a whole, share of private label is typically smaller than in Food & Beverage product areas, and the manufacturer growth is very similar to Private Label growth.

	Private Label Share	Private Label Growth	Manufacturer Growth
Baby Care Group	21%	8%	5%
Cosmetics Group	4%	5%	4%
Hair Care Group	3%	2%	5%
Personal Paper Group	27%	4%	5%
Dental Care Group	8%	4%	6%
Body Cleansing & Moisturizing Group	6%	6%	6%
Face Cleansing & Moisturizing Group	7%	8%	7%
Sun Care / Skin Coloring Group	11%	8%	9%
Hair Removal Group	5%	7%	5%

 Manufacturer brands growing faster than Private Label



What's Hot around the Globe:

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Methodology

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Insights on Growth in Personal Care Products



Methodology

Markets

This Nielsen study focused on the following 69 markets across five regions. These markets account for more than 90% of the world's real GDP and over 75% of the world's population.

<p>Europe (19)</p> <ul style="list-style-type: none">AustriaBelgiumSwitzerlandGermanyDenmarkSpainFinlandFranceGreat BritainIrelandItalyNetherlandsNorwayPortugalSwedenCzech RepublicSlovakiaHungaryPoland <p>Asia Pacific (14)</p> <ul style="list-style-type: none">AustraliaChinaHong KongIndonesiaIndiaJapanSouth KoreaMalaysiaNew ZealandSingaporeThailandTaiwanVietnamPhilippines <p>North America (2)</p> <ul style="list-style-type: none">CanadaUnited States	<p>Eastern Europe, Middle East & Africa (EEMEA) (21)</p> <ul style="list-style-type: none">United Arab EmiratesBulgariaEstoniaEgyptGreeceCroatiaIsraelKazakhstanLithuaniaLatviaMoroccoRomaniaRussiaSaudi ArabiaSloveniaTurkeySouth AfricaBelarusSerbia & MontenegroKenyaUkraine <p>Latin America (13)</p> <ul style="list-style-type: none">ArgentinaBrazilChileColombiaCosta RicaGuatemalaHondurasNicaraguaPanamaEl SalvadorMexicoPuerto RicoVenezuela
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What's Hot around the Globe



Insights on Growth in Personal Care Products

Categories & Segments

To get a complete view of Personal Care products, Nielsen captured trends from the categories listed below and then grouped these categories into nine larger product areas (in **bold**) for higher-level analysis.

Baby Care

Soothers - Pacifiers/Dummies
Disposable Diapers
Baby Moist Wipes
Diaper/Nappy Rash Cream
Disposable Changing Mats
Nursing Accessories

Cosmetics

Perfume/Cologne
Aftershave
Eye Cosmetics - Eyebrow/Liner/Mascara
Facial Cosmetics - Blush/Concealer/Foundation
Lip Cosmetics - Gloss/Tinted Balm/Liner
Nail Cosmetics - Nail Care/Polish
Cosmetic Removers - Eye/Face/Nail

Hair Care

Shampoo
Conditioners
Hair Styling Temporary
Hair Styling Permanent Wave/Straightener
Colorants
Anti-Baldness

Personal Paper

Sanitary Protection
 Sanitary towels/pads/napkins
 Tampon
 Panty liner
Incontinence Pads/Pants
Toilet Tissue
Facial Tissues
Personal Moist Wipes
Cotton Wool

Dental Care

Tooth Cleaning
Toothbrushes
 Manual toothbrushes
 Powered toothbrushes (Electric/battery)
Dental Floss/Tape
Mouthwash/Oral Rinses/Antiseptics
Breath Fresheners
Denture Cleansers
Denture Fixatives
Tooth Stain Removers/ Whiteners

Body Cleansing & Moisturizing

Deodorants (includes body sprays)
Hand/Body/All Purpose Moisturizers
Massage Creams / Oils
Bath Additives
Body Cleansing Shower Gel - Cream/Gel/Liquid
Toilet Soap
Specialist Cleansing - Hand
Hand Sanitizers

Face Cleansing & Moisturizing

Face & Eye Moisturizers
Lip Moisturizers
Face Cleansing / Toning
Anti Spot/Acne Cleansers

Sun Care / Skin Coloring

Aftersun
Self-Tanning
Facial/Body Hair Bleaching/Lightening
Sun Protection
Skin Lightening

Hair Removal

Razors & Blades
Shaving Bars/Cream/Foam/Gel
Depilatories
Powered Shavers

What's Hot around the Globe



Insights on Growth in Personal Care Products



Coverage

As with our other studies, this report is based on purchasing information from grocery and mass merchandise retailers and generally excludes such channels as department stores and home improvement centers. In some markets, sales from convenience stores, pharmacies, and specialty stores are also included. It is important to note that Nielsen consumer panel data has been included as the source for US Wal-Mart information, which is included in the totals for North America.

Since coverage can differ significantly across markets, we have cited in our findings the actual number of markets included in this study where relevant. In cases where products were segmented into different categories across markets, we have aligned the products and categories in order to provide the most consistent view available.

Time Period

Information was collected for the 12-month periods ending year-end 2005 and 2006. Due to differences in timing of data collection in some locations around the world, the actual year-ending date could vary among different markets; however, each market compared consistent 12-month year-over-year figures.

What's Hot around the Globe



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Exchange Rate (per US\$)

To obtain a global perspective, local currency was converted to US \$ using a constant exchange rate of December 2006 across the two years measured.

Europe

Euro	0.7557722
Swiss Franc	1.21295
Czech Koruna	20.8789998
Danish Krone	5.63235
British Pound	0.5070737
Hungarian Forint	191.2800161
Norwegian Krone	6.1737
Polish Zloty	2.88365
Swedish Krona	6.8124
Slovakia Koruna	26.3299999

North America

Canadian Dollar	1.1531
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Asia Pacific

Australian Dollar	1.2738853
China Renminbi	7.815
Hong Kong Dollar	7.77475
Indonesian Rupiah	9087.5142486
Indian Rupee	44.7112513
Japanese Yen	118.0799983
South Korean Won	925.800011
Malaysian Ringgit	3.544
New Zealand Dollar	1.4325519
Philippines Peso	49.3825007
Singapore Dollar	1.54015
Thai Baht	35.7199993
Taiwan Dollar	32.6139999
Vietnam Dong	16060.0992371

Latin America

Argentine Peso	3.0575
Brazil Real	2.1606
Chilean Peso	527.0499321
Colombian Peso	2243.35313185
Costa Rican Colon	515.7601361
El Salvadorian Colon	8.752
Guatemalan Quetzal	7.595
Honduran Lempira	18.8950001
Mexican Peso	10.8350001
Nicaraguan Cordoba	17.9740001
Panamanian Balboa	1
Venezuelan Bolivar	2147.2997522

EEMEA

Belarus Rouble	2141.5012878
Bulgarian Lev	1.485
Estonian Kroon	11.8251499
Egyptian Pound	5.7125
Croatian Kuna	5.56755
Israeli Shekel	4.1805
Kazakhstan Tenge	127.7500027
Kenyan Shilling	69.6499991
Lithuanian Lit	2.60955
Latvian Lat	0.5271
Moroccan Dirham	8.4238
Romanian Leu (new)	2.58435
Russian Ruble	26.2634999
Saudi Riyal	3.75035
Serbian Dinar	60.3757486
Slovenia Tolar	181.1250175
Turkish Lira (new)	1.4285
South African Rand	6.997
Ukraine Hryvna	5.04
United Arab Emirates	3.67285