

JOHANNESBURG OFFICE

BALLYOAKS OFFICE PARK, BUILDING B, 35 BALLYCLARE DRIVE, BRYANSTON EXT 7

P O Box 3044, RANDBURG, 2125

TEL: +27 11 513 -1450 FAX: +27 11 463-2771

PORT ELIZABETH OFFICE

1ST FLOOR, BLOCK F, SOUTHERN LIFE GARDENS, 70 2ND AVENUE, NEWTON PARK

P O Box 505, HUNTERS RETREAT, 6017

TEL: +27 41 394-0600 FAX: +27 41 363-2869

WEBSITE: WWW.WHOOWNSWHOM.CO.ZA

REG No: 1986/003014/07



Essential Business Information

A large, faint, light blue version of the 'Who Owns Whom' logo is centered in the background of the page.

THE NUTRICEUTICAL INDUSTRY

Siccode 33530b

December 2011

COMPILED BY:

Kim Imrie

research@whoownswhom.co.za

DIRECTORS: MAUREEN MPHATSOE (CHAIRPERSON), JIM FICK (EXPERIAN), GLEN BALS (EXPERIAN), ANDREW MCGREGOR (MANAGING)

© COPYRIGHT WHO OWNS WHOM (PTY) LTD

Contents

1	INTRODUCTION	1
2	DESCRIPTION OF THE INDUSTRY	1
2.1	Industry Supply Chain	3
3	SIZE OF THE INDUSTRY	3
4	STATE OF THE INDUSTRY	6
4.1	Local	6
4.1.1	Corporate Actions	9
4.1.2	Regulations	11
4.1.3	Black Economic Empowerment (BEE)	12
4.2	Regional	12
4.3	International	13
5	INFLUENCING FACTORS	14
5.1	Economic Environment	14
5.2	Health Trends	14
5.3	Regulation	15
5.4	National Health Insurance	15
5.5	More Effective Distribution Channels	16
5.6	Training of Staff and Education	16
5.7	Accessibility of Information	17
6	COMPETITION	17
6.1	Research and Development	17
7	SWOT ANALYSIS	18
8	FUTURE OUTLOOK	19
9	INDUSTRY ASSOCIATIONS	19
10	REFERENCES	22
10.1	Publications	22
10.2	Websites	22
APPENDIX 1		24
Nutrition-oriented Direct Selling Companies who are members of the DSA		24
ORGANOGRAM		26
COMPANY PROFILES		29
ABBOTT NUTRITION (DIVISION OF ABBOTT LABORATORIES SA (PTY) LTD)		29
ADCOCK INGRAM HEALTHCARE (PTY) LTD		31
AFRIPLEX (PTY) LTD		34
AIM AFRICA INC		36
AMWAY SOUTH AFRICA LLC		38
ASPEN PHARMACARE HOLDINGS LTD		40
BAYER (PTY) LTD		43
BIOSCIENCE BRANDS LTD		46

CIPLA MEDPRO SOUTH AFRICA LTD	49
CLICKS GROUP LTD	52
COMED HEALTH (PTY) LTD	56
CREST CHEMICALS (PTY) LTD	58
DB FINE CHEMICALS (PTY) LTD	60
DEON SCHOEMAN CC	61
DIS-CHEM CONSOLIDATED (PTY) LTD	63
FOREVER LIVING PRODUCTS SOUTH AFRICA (PTY) LTD	64
GNLD INTERNATIONAL (PTY) LTD	65
HERBA ZONE (PTY) LTD	65
HERBALIFE INTERNATIONAL SOUTH AFRICA LTD	67
INGELHEIM PHARMACEUTICALS (PTY) LTD	68
INTAKA NUTRI (PTY) LTD	70
KELLOGG COMPANY OF SOUTH AFRICA (PTY) LTD	71
MORE TO LIFE HEALTH (PTY) LTD	73
NATIVA (PTY) LTD	74
NESTLÉ (SOUTH AFRICA) (PTY) LTD	76
NOVARTIS SOUTH AFRICA (PTY) LTD	79
NUTRITIONAL HOLDINGS LTD	81
OTC-PHARMA S A (PTY) LTD	83
PARCEVAL (PTY) LTD	84
PFIZER LABORATORIES (PTY) LTD	85
PHARMA DYNAMICS (PTY) LTD	88
PHARMA NATURA (PTY) LTD	90
PROTEA SPECIALITY CHEMICALS (DIVISION OF OMNIA GROUP (PTY) LTD)	92
REGAL NUTRIENTS (PTY) LTD	94
SAVANNAH FINE CHEMICALS (PTY) LTD	96
SK CHEMTRADE SERVICES (PTY) LTD	98
SOLAL TECHNOLOGIES (PTY) LTD	99
SOLGAR SOUTH AFRICA (PTY) LTD	102
SOUTH AFRICAN NUCLEAR ENERGY CORPORATION LTD, THE	103
SPORTRON INTERNATIONAL (PTY) LTD	106
SUNRIDER SOUTH AFRICA (PTY) LTD	107
SWISSGARDE (PTY) LTD	108
TIGER BRANDS LTD	110
VITAL HEALTH FOODS (PTY) LTD	114
WARREN CHEM SPECIALITIES (PTY) LTD	116
WINTHROP PHARMACEUTICALS (PTY) LTD	117