Toilet Preparations

INDUSTRY PROFILE

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Canada

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INDUSTRY PROFILE

1990–1991

TOILET PREPARATIONS

FOREWORD

In a rapidly changing global trade environment, the international competitiveness of Canadian industry is the key to growth and prosperity. Promoting improved performance by Canadian firms in the global marketplace is a central element of the mandates of Industry, Science and Technology Canada and International Trade Canada. This Industry Profile is one of a series of papers in which Industry, Science and Technology Canada assesses, in a summary form, the current competitiveness of Canada's industrial sectors, taking into account technological, human resource and other critical factors. Industry, Science and Technology Canada and International Trade Canada assess the most recent changes in access to markets, including the implications of the Canada-U.S. Free Trade Agreement. Industry participants were consulted in the preparation of the profiles.

Ensuring that Canada remains prosperous over the next decade and into the next century is a challenge that affects us all. These profiles are intended to be informative and to serve as a basis for discussion of industrial prospects, strategic directions and the need for new approaches. This 1990–1991 series represents an updating and revision of the series published in 1988–1989. The Government will continue to update the series on a regular basis.

Michael Wilson

Michael H. Wilson
Minister of Industry, Science and Technology
and Minister for International Trade

Structure and Performance

Structure

Toilet preparations include a wide range of products, such as powders, liquids, lotions, creams and other preparations used to clean, protect and beautify the human body. Products can be categorized broadly into toiletries, fragrances and cosmetics. Toiletries include hair preparations (shampoo, conditioner, hair spray, styling gel and mousse, home permanents, bleach and colouring), skin preparations (cleansers, moisturizers, acne preparations, soap, bath oils, talcum powder and suntan preparations, including ultraviolet blocks), personal hygiene preparations (antiperspirants, deodorants, toothpaste, shaving creams and lotions, and foot-care products) and some miscellaneous items (gift sets and consumer promotional packages). Fragrances include perfumes, colognes and toilet waters. Cosmetics include facial make-up preparations (foundation, powder, blush, lipstick, eye shadow and mascara) and nail-care products (nail polish).

Toiletries accounted for 73 percent of domestic industry sales in 1990 (hair preparations made up 26 percent of the total; skin preparations, 23 percent; personal hygiene preparations, 22 percent; and miscellaneous items, 2 percent).[1] Fragrances contributed 15 percent of domestic industry sales; cosmetics contributed 12 percent.

In 1990, the Canadian industry employed about 9 500 people (approximately 5 500 in production-related activities) and generated shipments estimated to be $1 730 million. This industry is concentrated in Ontario and Quebec, which have 55 and 43 percent, respectively, of the employment.

[1] Data for 1990, supplied by the Canadian Cosmetic, Toiletry and Fragrance Association.

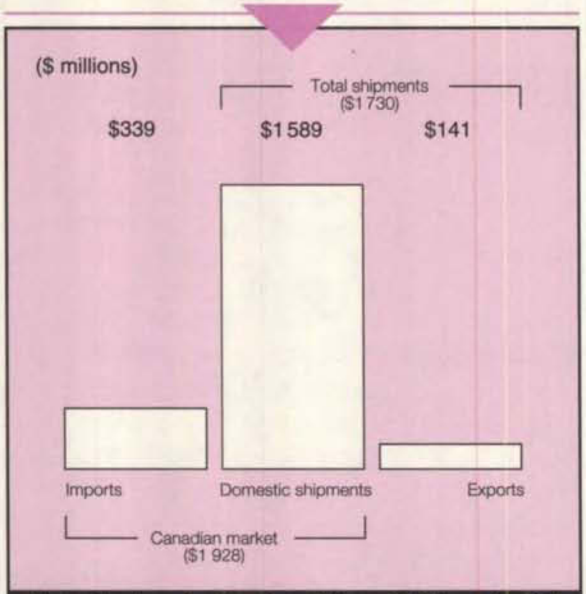

Figure 1 — Imports, Exports and Domestic Shipments, 1990

In 1990, exports were $141 million (8.2 percent of shipments) and imports amounted to $339 million (17.6 percent of the Canadian market). Canada accounted for 2.6 percent of world production in 1990. The Canadian toilet preparations industry is heavily oriented to manufacturing for the domestic market, with about 92 percent of its total production consumed in Canada. Domestic shipments accounted for 82 percent of the Canadian market valued at $1 928 million (Figure 1).

The manufacture of toilet preparations in Canada consists largely of batch-type operations that blend raw materials, test for quality, fill retail-size containers and package those containers for shipment to retailers. In Canada, production and packaging equipment tends to be semi-automated, easy to operate and relatively low in capital cost. Typical U.S. operations are much larger and employ more sophisticated, highly automated computer-controlled equipment designed for large production runs. Even for multiline brands, where similar equipment is often used in U.S. and Canadian plants, the U.S. facility may be able to have a separate production line for each colour or fragrance and to operate with more shifts than its Canadian counterpart. Generally because of their smaller size and smaller market, Canadian plants of multinational companies are more versatile and less capital intensive than their parents' operations in the United States, although rationalization has been occurring.

Major materials and supplies that are used in the production of toilet preparations include essential oils and fragrances, surfactants, alcohols, glycerine, fluorinated halogen hydrocarbons, fatty acids, petroleum jelly, organic acids and their derivatives, organic and inorganic chemicals, refined mineral oils, tallow and containers and other packaging materials. Most of these supplies are readily available in Canada but are not necessarily produced in Canada. The more specialized, unique and higher-value fragrances, essential oils and fancy containers are imported.

The Canadian industry consists of two major segments that are distinguished by ownership and nature of activity. The larger segment consists of Canadian subsidiaries of foreign-owned multinationals. These companies produce and market a wide range of products and directly account for more than 75 percent of Canadian shipments. Nine of the ten largest firms operating in Canada are foreign-owned, seven by U.S. and two by European companies. U.S.-owned Avon Canada is the largest toilet preparations company in Canada (and part of the largest such enterprise in the world). It and other Canadian subsidiaries were established to serve the Canadian market and, consequently, these subsidiaries did not compete with other foreign-based affiliates offering the same products. This philosophy is changing as a few Canadian establishments seek North American mandates for certain products in reaction to the Canada-U.S. Free Trade Agreement (FTA).

The domestically owned segment of the industry contains many relatively small manufacturers with annual sales of less than $10 million. Some of these small firms produce and market for themselves; some are licensed to manufacture and distribute on behalf of foreign-owned companies; and some manufacture on a custom basis, principally for major multinationals. The industry also includes, to a lesser extent, small Canadian companies that market toilet preparations, but do not manufacture them. Flexible and versatile, domestic manufacturers specialize in small production runs primarily because of their relatively wide product range and their lack of high-volume, brand-name products. CCL Industries, a diversified custom manufacturer, which produces a complete range of toilet preparations, is an exception among Canadian-owned firms because of its large size.

In 1989, the top five firms held about 35 percent of the Canadian market and the top 14 firms held 68 percent. Many toilet preparation companies manufacture products that are more appropriately classified as pharmaceuticals or soap and cleaning products.[2] Likewise, pharmaceutical, soap and

[2]For more information on these industries, see separate industry profiles on *Pharmaceuticals* and *Soap and Cleaning Compounds*.

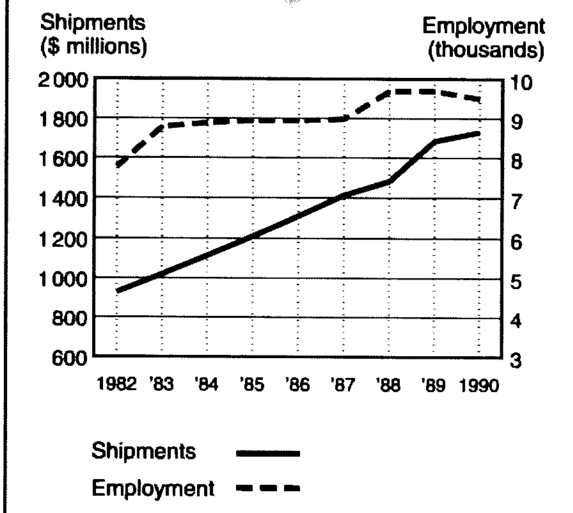

Figure 2 — Total Shipments and Employment

cleaning product companies in many cases also produce toilet preparations.

Performance

The real average annual growth rate of Canadian shipments has been around 3 percent from 1982 to 1990. Exports, which accounted for $23 million (2.5 percent of shipments) in 1982, increased to $141 million (8.2 percent of shipments) in 1990.[3] Imports, which were $89 million (9.0 percent of the Canadian market) in 1982, increased to $339 million (17.6 percent of the Canadian market) in 1990. There has been a significant shift in the source of imports since 1982. The share of imports coming from the United States dropped from 72 percent in 1982 to 50 percent in 1986 but rose again to 63 percent in 1990. The share of imports from the European Community (EC) increased from 26 percent in 1982 to 46 percent in 1986 but dropped to 34 percent in 1990. The range of these trade shares illustrates the importance and changeability of consumer tastes as well as the impact of the FTA.

Employment by companies predominantly in the toilet preparations industry increased from 7 769 people in 1982 to approximately 9 696 in 1989 but then dropped to about 9 500 in 1990 because of a number of acquisitions, mergers and closures in 1989 and 1990 (Figure 2). Investment in this sector was relatively low but has been rising, reaching $46 million in 1989 (about 2.7 percent of shipments compared with 1.5 percent in 1982).

The industry's overall financial health has been good. After-tax profits as a percentage of shipments have averaged about 3 percent over the five-year period ending in 1987, the last year for which data are available. In recent years, the industry has responded to slower growth in unit sales by extending existing lines, offering complementary products to increase sales and introducing new products in spite of higher marketing costs. Brand loyalty is reinforced with advertising and is much less significant in those products where advertising is minimal. Consumers change brands if a competitive product is perceived to be of better quality or value and satisfies other consumer requirements.

Strengths and Weaknesses

Structural Factors

Key factors influencing the competitiveness of the Canadian toilet preparations industry include scale of production, availability of raw materials and the cost of transportation, marketing and advertising.

The Canadian industry is essentially a branch-plant industry serving the domestic market. Canadian companies typically operate one shift at a single manufacturing facility, regardless of its size. By contrast, the largest U.S. plants are fully automated in both manufacturing and packaging, using the latest high-speed production and packaging equipment. Some large U.S. firms have a few huge, rationalized facilities and up to six distribution centres strategically located across the country. The U.S. toilet preparations industry, with shipments of US$18.5 billion in 1990, is almost 11 times larger than the Canadian industry.

The Canadian industry currently has a disadvantage in some input costs. Almost all fragrance compounds are imported through Canadian subsidiaries of specialty fragrance houses, some of which develop formulations for Canadian clients. These foreign laboratories may use 3 000 different ingredients to produce a specific compound. For toilet preparations in general, about half the raw materials are imported, often in the form of bulk concentrates from the

[3] In 1988, the Harmonized Commodity Description and Coding System (HS) replaced the commodity-based classification system for tracking imports and exports. Because of this change, data from 1982 to 1987 are not strictly comparable with data from 1988 to 1990, but underlying trends remain valid. Preliminary data for 1991 suggest that exports and imports nearly doubled from 1988 to 1991, the period during which the HS has operated and during which tariff rates between Canada and the United States have been falling.

parent organization. Raw materials, on average, represent some 15 to 20 percent of the value of Canadian shipments and tend to be more expensive for Canadian firms because they are purchasing small quantities and may also be paying import tariffs. Packaging materials account for 15 percent of the value of Canadian shipments on average, and are primarily obtained in Canada. Packaging costs of Canadian manufacturers are higher than those of U.S. manufacturers in terms of percentage of the total production cost. However, some companies are tailoring their machinery to accommodate changing consumer needs and limited production runs.

Production, including raw materials and packaging costs, represents about 40 percent of the value of domestic shipments. For recognized brand names, advertising and marketing costs are equal to or more than production and packaging costs, and they contribute as much to commercial success as the product's quality. Canadian subsidiaries benefit from the financial strength of the parent company and may benefit from the spillover effect of advertising promotion in the North American media.

Transportation costs account for 4 to 5 percent of the value of the finished product. These costs can be important in favouring local production for many low-value, relatively bulky products such as shampoos, conditioners, creams, toothpaste and toilet water. Transportation costs are not as important for high-value products such as perfumes.

Canadian plants located close to the U.S. border producing relatively high-volume, low-cost goods are better positioned to compete in the United States than more remote facilities. Taking advantage of such opportunities may require specialization and the acquisition of world mandates, developments that often involve additional investment since Canadian plants tend to be smaller and historically less cost-competitive.

Changes in Canadian consumer demand or the introduction of new competing products require quick reactions and close inventory control. Since Canadian consumers often have different preferences from their U.S. counterparts, many foreign companies maintain more than a simple warehousing presence in Canada.

There are several major Canadian custom manufacturers that efficiently produce a wide range of products. In fact, some are competitive with U.S. custom manufacturers in filling aerosol cans and in certain other specializations. For custom manufacturers, flexibility, versatility and the ability to respond quickly to special orders is more important than the lower costs associated with economies of scale. Custom manufacturers are often asked to manufacture new products until they gain a market acceptance wide enough for the multinational companies to start manufacturing. Canadian custom manufacturers sell most of their products to the Canadian subsidiaries of U.S. multinationals.

Trade-Related Factors

Under the FTA, tariffs on most toilet preparations moving between Canada and the United States will be eliminated in 10 annual equal reductions, starting 1 January 1989. Tariff elimination is the main element of the FTA affecting toilet preparations. Tariffs were important in the development of a domestic industry in Canada and continue to protect the established manufacturing base from competitors located outside North America. The 1992 Canadian tariff is 3.0 to 7.5 percent on goods from the United States under the FTA. The Most Favoured Nation (MFN) rates faced by European imports into Canada range from 5.0 to 12.5 percent. Corresponding U.S. tariff rates are currently between 1.6 and 4.0 percent, while corresponding EC tariffs are set at 6.6 percent. Japanese tariffs range from 4.9 to 8.2 percent. Competition from less developed countries (LDCs) and newly industrialized countries (NICs) in finished toiletry products is almost nonexistent, although many are the source of naturally occurring fragrance essences.

Concerns about health and consumer information requirements have generated a number of non-tariff barriers (NTBs) that hamper the free movement of goods across borders. The most common categories of NTBs are:

- restricted or banned ingredients
- manufacturing standards (particularly relevant for medicated toilet preparations)
- labelling requirements (full disclosure)
- language requirements on labels and instruction booklets
- standard package sizes
- metric versus imperial measures
- transportation restrictions affecting axle weights and flammable materials
- requirements for health and safety information on ingredients or medicated products.

Technological Factors

The technology required for production, packaging and warehousing needs is freely available and does not impede potential entrants to this industry. Generally, Canadian producers cannot justify fully automated, high-volume production equipment because of their limited market and the need to be more versatile, particularly with short runs.

Product formulations are usually developed in research centres of multinational corporations, and specialty fragrance houses as well as by custom manufacturers that work to customer specifications. Since subsidiaries can usually gain access to the formulations of their parents, they do not carry out research and development (R&D) activities in Canada.

Canadian R&D is minimal and not oriented to new fragrance chemistry or compound discovery. Few unique fragrances have been developed in Canada. Development usually means blending various proportions of standard raw ingredients, modifying a formula to produce a slightly different product, or using different supply sources.

Other Factors

The *Food and Drugs Act*, administered by Health and Welfare Canada, has an important impact on the toilet preparations industry. This Act controls the manufacturing, advertising and sale of cosmetics to safeguard the health of the user and to ensure safe manufacturing practices. There are also specific requirements regarding the labelling of food, drugs and cosmetics in pressurized (aerosol) containers. Cosmetic regulations under the Act specify cautionary labelling, packaging and notification requirements and prohibit certain materials being used in cosmetics and certain advertising claims being made.

The Workplace Hazardous Materials Information System (WHMIS), established at Health and Welfare Canada in 1988, is a nation-wide system to protect Canadian workers from the adverse effects of hazardous materials. WHMIS provides relevant information, while minimizing any negative economic impact on industry or trade. The system provides specifications for cautionary labelling for containers holding hazardous materials, material safety data sheets and worker education programs.

In Canada, manufacturers and formulators of toiletries, cosmetics and fragrances are subject to WHMIS requirements. Canadian reporting requirements under WHMIS are somewhat more detailed than parallel U.S. ones and are similar to those being considered by the International Labour Organization in conjunction with the Organization for Economic Co-operation and Development (OECD), which the EC is expected to adopt.

Evolving Environment

At the time of writing, the Canadian and U.S. economies were showing signs of recovering from a recessionary period. During the recession, companies in the industry generally experienced reduced demand for their outputs, in addition to longer-term underlying pressures to adjust. In some cases, the cyclical pressures may have accelerated adjustments and restructuring. With the signs of recovery, though still uneven, the medium-term outlook will correspondingly improve. The overall impact on the industry will depend on the pace of the recovery. From 1992 to 1997, domestic per capita real growth for toilet preparations is expected to remain modest, at 2 to 3 percent annually.

This industry is primarily consumer-driven. Changeable consumer demands dictate the success or failure of products. Changing demographics, the increasing number of singles, the growing focus on physical attractiveness, concern about environmental hazards such as the depletion of the ozone layer and advertising expenditures will increase demand for new products. Products expected to enjoy particularly high growth are products for men and those that are health-oriented or intended for the mature consumer (skin-care products and wrinkle removers, sun protection and tanning products, and natural-base products).

The industry will face increasing costs resulting from regulations to control product testing and reduce packaging waste. Particular care will have to be taken with sun blocks to ensure that they are effective and have no adverse side effects.

The FTA will have different impacts upon the Canadian-owned and U.S.-owned segments of the toilet preparations industry. For Canadian-owned companies that are export-oriented, elimination of U.S. tariffs will mean increased export opportunities. Some firms are rationalizing by moving manufacturing activities, often to their newest plants.

The shutdown of Gillette, Clairol and Maybelline plants in Canada also indicates some rationalization in the U.S.-owned segment. This situation provides growth opportunities for cost-efficient Canadian-based contract manufacturers to fill the void left by the scaling down of some U.S.-owned plants based in Canada. Some Canadian subsidiaries, however, have benefited and obtained world or North American mandates for some products. The 69 percent increase in U.S. exports since 1988, and the rising share of imports from the United States during a recessionary period suggest an increasing degree of specialization and scale not before achieved in Canada.

On 12 August 1992, Canada, Mexico and the United States completed the negotiation of a North American Free Trade Agreement (NAFTA). The Agreement, when ratified by each country, will come into force on 1 January 1994. The NAFTA will phase out tariffs on virtually all Canadian exports to Mexico over 10 years, with a small number being eliminated over 15 years. The NAFTA will also eliminate most Mexican import licensing requirements and open up major government procurement opportunities in Mexico. It will also streamline customs procedures, and make them more certain and less subject to unilateral interpretation. Further, it will liberalize Mexico's investment policies, thus providing opportunities for Canadian investors.

Additional clauses in the NAFTA will liberalize trade in a number of areas including land transportation and other service sectors. The NAFTA is the first trade agreement to contain provisions for the protection of intellectual property rights. The NAFTA also clarifies North American content rules and obliges U.S. and Canadian energy regulators to avoid disruption of contractual arrangements. It improves the dispute settlement mechanisms contained in the FTA and reduces the scope for using standards as barriers to trade. The NAFTA extends Canada's duty drawback provisions for two years, beyond the elimination provided for in the FTA, to 1996 and then replaces duty drawback with a permanent duty refund system.

Competitiveness Assessment

Many Canadian toilet preparation companies are subsidiaries of U.S. parent organizations or domestic firms manufacturing under licence or holding the distribution rights in Canada for foreign products. Foreign firms generally control the worldwide distribution of their products and only rarely give Canadian subsidiaries or agents global mandates to compete for sales in other markets.

Globally, the industry has gone through a significant number of large mergers during the last four years. Well-known labels and brand names have been bought by emerging large conglomerates. This increased international concentration of the industry has resulted in worldwide rationalization and consolidation. When the NAFTA is ratified, it will accelerate this rationalization within the participating countries.

In the process, about 10 percent of the older Canadian plants have ceased manufacturing and have been converted to warehouse operations for U.S. plants. Others have adopted world and North American mandates. A few have been sold to employees who have retained contracts with their previous parent while widening their markets through new alliances and niche market strategies.

With strong export growth from 1988 to 1990, during a recessionary period, and the retreat of several multinationals from Canada, it is becoming clear that several small Canadian start-up operations are making successful international inroads. Younger niche market Canadian firms are filling much of the void left by the consolidation efforts of large multinationals. These emerging firms are internationally competitive.

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PRINCIPAL STATISTICS[a]

	1982	1983	1984	1985	1986	1987	1988	1989	1990[b]
Establishments (SIC 3771)	74	84	88	87	91	83	92	90	89
Employment (SIC 3771)	7 769	8 785	8 881	8 942	8 939	8 979	9 692	9 696	9 500
Shipments ($ millions)									
SIC 3771 – Toilet preparations	666	742	805	878	944	1 041	1 077	1 238	1 260
SIC 3761 – Producing toilet preparations	233	245	272	287	316	313	341	381	400
SIC 3741 – Producing toilet preparations	29	33	37	45	50	59	64	65	70
Total shipments	928	1 020	1 114	1 210	1 310	1 413	1 482	1 684	1 730
Shipments (constant 1988 $ millions)	1 340	1 368	1 365	1 427	1 487	1 542	1 482	1 629	1 657
GDP[c] (constant 1986 $ millions)	391	479	412	436	415	428	360	360	N/A
Investment[d] ($ millions)	14	13	16	25	35	32	49	46	N/A
Profits after tax[e]									
($ millions)	31	38	31	38	48	20	N/A	N/A	N/A
(% of shipments)	3.3	3.7	2.8	3.1	3.7	1.4	N/A	N/A	N/A

[a]For establishments, employment and shipments, see *Chemical and Chemical Products Industries*, Statistics Canada Catalogue No. 46-250, annual. The industry is well-defined statistically, falling primarily within SIC 3771, toilet preparations industry, which accounted for 77 percent of manufacturers' shipments. The remaining shipments originate from establishments classified under SIC 3761, soap and cleaning compounds industry (21 percent) and SIC 3741, pharmaceutical and medicine industry (2 percent).

[b]Data for 1990 are ISTC estimates.

[c]See *Gross Domestic Product by Industry*, Statistics Canada Catalogue No. 15-001, monthly.

[d]See *Capital and Repair Expenditures, Manufacturing Subindustries, Intentions*, Statistics Canada Catalogue No. 61-214, annual.

[e]See *Corporation Financial Statistics*, Statistics Canada Catalogue No. 61-207, annual.

N/A: not available

TRADE STATISTICS

	1982	1983	1984	1985	1986	1987	1988[c]	1989[c]	1990[c]
Exports[a]									
($ millions)	23	32	32	38	44	59	93	137	141
(constant 1988 $ millions)	35	44	39	45	50	65	93	133	137
Domestic shipments									
($ millions)	905	988	1 082	1 172	1 266	1 354	1 389	1 547	1 589
(constant 1988 $ millions)	1 305	1 324	1 326	1 382	1 437	1 477	1 389	1 496	1 520
Imports[b]									
($ millions)	89	108	126	143	176	178	233	264	339
(constant 1988 $ millions)	133	148	155	169	200	195	233	256	329
Canadian market									
($ millions)	994	1 096	1 208	1 315	1 442	1 532	1 622	1 811	1 928
(constant 1988 $ millions)	1 438	1 472	1 481	1 551	1 637	1 672	1 622	1 752	1 849
Exports (% of shipments)	2.5	3.1	2.9	3.1	3.4	4.2	6.3	8.1	8.2
Imports (% of Canadian market)	9.0	9.9	10.4	10.9	12.2	11.6	14.4	14.6	17.6

[a]See *Exports by Commodity*, Statistics Canada Catalogue No. 65-004, monthly.

[b]See *Imports by Commodity*, Statistics Canada Catalogue No. 65-007, monthly.

[c]It is important to note that data for 1988 and after are based on the Harmonized Commodity Description and Coding System (HS). Prior to 1988, the shipments, exports and imports data were classified using the Industrial Commodity Classification (ICC), the Export Commodity Classification (XCC) and the Canadian International Trade Classification (CITC), respectively. Although the data are shown as a continuous historical series, users are reminded that HS and previous classifications are not fully compatible. Therefore, changes in the levels for 1988 and after reflect not only changes in shipment, export and import trends, but also changes in the classification systems. It is impossible to assess with any degree of precision the respective contribution of each of these two factors to the total reported changes in these levels.

SOURCES OF IMPORTS[a] (% of total value)

	1982	1983	1984	1985	1986	1987	1988[b]	1989[b]	1990[b]
United States	72	66	59	52	50	55	60	60	63
European Community	26	31	38	45	46	39	36	35	34
Asia	1	2	2	2	2	3	2	3	2
Other	1	1	1	1	2	3	2	2	1

[a]See *Imports by Commodity*, Statistics Canada Catalogue No. 65-007, monthly.

[b]Although the data are shown as a continuous historical series, users are reminded that HS and previous classifications are not fully compatible. Therefore, changes in the levels for 1988 and after reflect not only changes in import trends, but also changes in the classification systems.

DESTINATIONS OF EXPORTS[a] (% of total value)

	1982	1983	1984	1985	1986	1987	1988[b]	1989[b]	1990[b]
United States	73	78	82	81	84	82	70	75	78
European Community	5	3	2	3	3	6	9	12	9
Asia	6	2	2	2	2	3	7	4	6
Other	16	17	14	14	11	9	15	9	7

[a]See *Exports by Commodity*, Statistics Canada Catalogue No. 65-004, monthly.

[b]Although the data are shown as a continuous historical series, users are reminded that HS and previous classifications are not fully compatible. Therefore, changes in the levels for 1988 and after reflect not only changes in export trends, but also changes in the classification systems.

REGIONAL DISTRIBUTION[a] (average over the period 1986 to 1988)

	Atlantic	Quebec	Ontario	Prairies	British Columbia
Establishments (% of total)	–	38	55	2	5
Employment (% of total)	–	43	55	–	2
Shipments (% of total)	–	45	55	–	–

[a]See *Chemical and Chemical Products Industries*, Statistics Canada Catalogue No. 46-250, annual.

MAJOR FIRMS

Name	Country of ownership	Location of major plants
Avon Canada Inc.	United States	Pointe-Claire, Quebec
CCL Industries Inc.	Canada	Toronto, Ontario
Chesebrough-Pond's (Canada) Inc. (Unilever)	United Kingdom	Markham, Ontario
Colgate-Palmolive Canada Inc.	United States	Toronto, Ontario
Cosmair Canada Inc. (L'Oréal)	France	Montreal, Quebec
Estée Lauder Cosmetics Ltd.	United States	Toronto, Ontario
Helene Curtis Ltd.	United States	Baie d'Urfé, Quebec
Johnson & Johnson Inc.	United States	Montreal, Quebec
Procter & Gamble Inc.	United States	Toronto, Ontario
Revlon Canada Inc. (Subsidiary of Revlon International Corp.)	United States	Mississauga, Ontario

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