

The Health and Personal Care Logistics Conference, Inc.

Longboat Key, Florida
October 12, 2009

EXCERPT



Global Economic Trends

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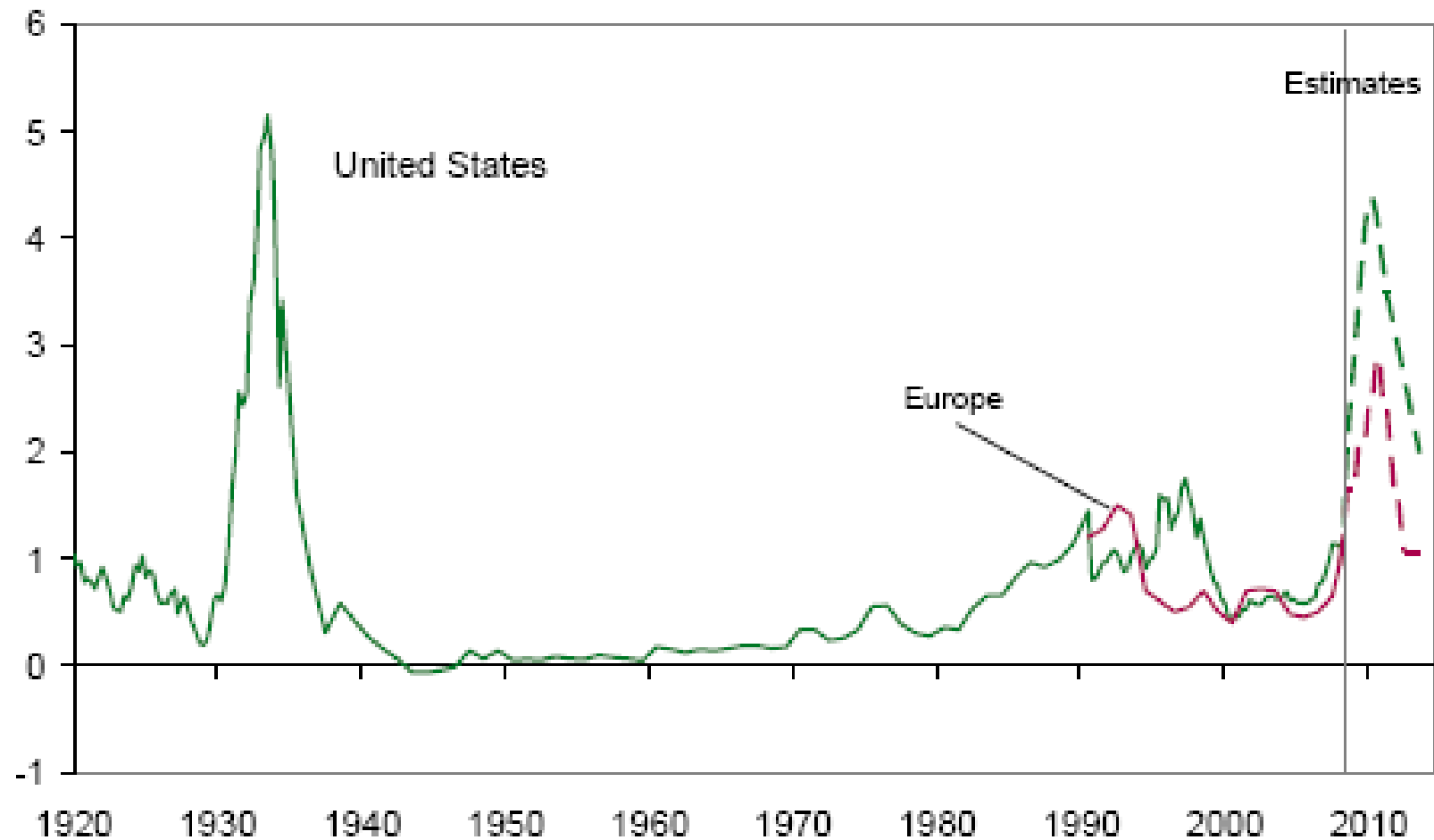


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Severity of the Global Financial Crisis

Figure 1.30 Commercial Bank Loan Charge-Offs
(In percent of total loans)















Source: IMF



Global Economic Outlook

Macroeconomic Scenarios

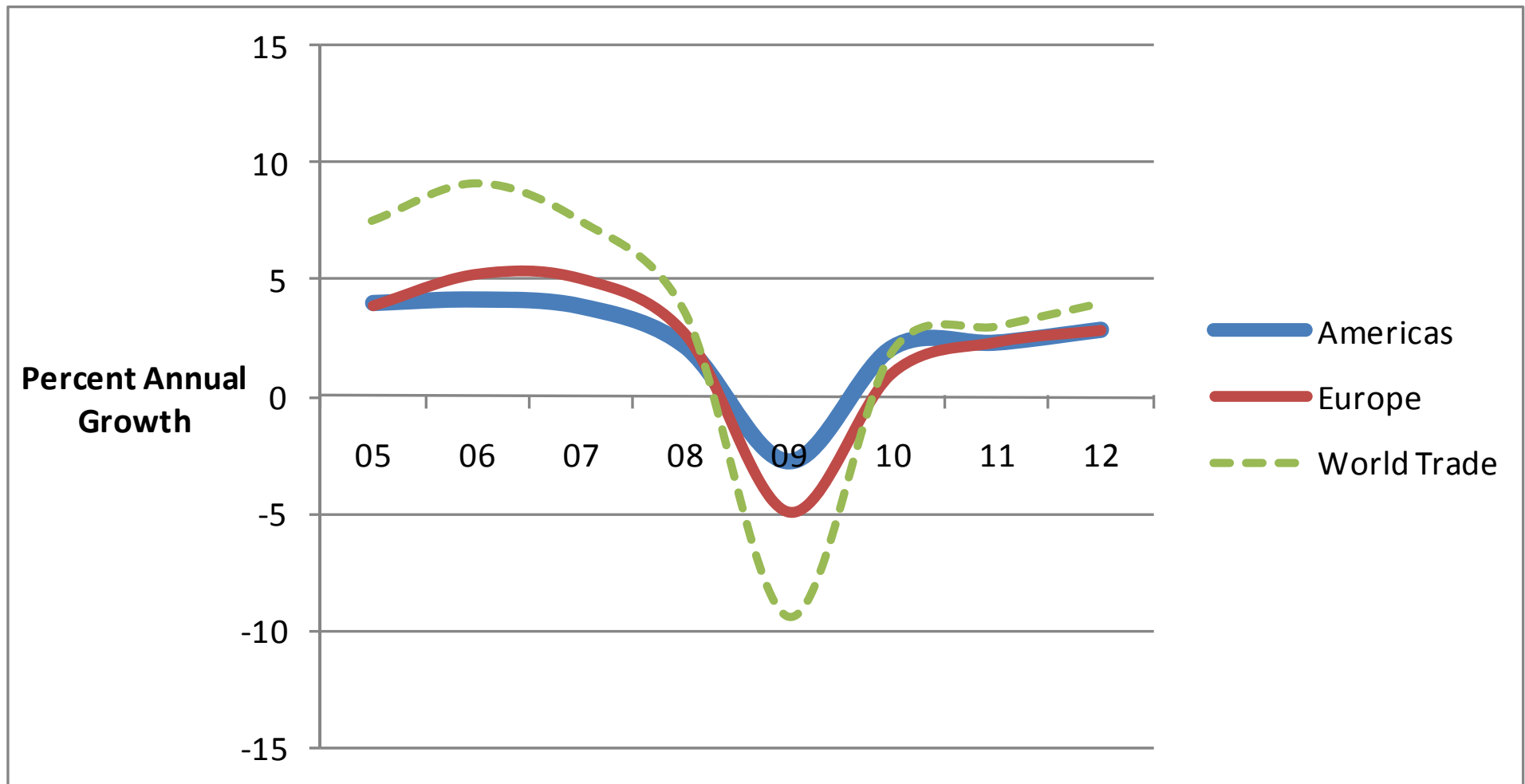
Scenario	Likelihood	Impact on Corporate Profits
Deep Recessionary Aftershock		
Run on Banks as Defaults Mount		
Hyper-Inflation or Hyper-Deflation		
Currency Crisis		
Consumer Malaise Impedes Trade Recovery		
Major Countries Go Bankrupt		

Source: Boston Strategies International adaptation of scenarios considered by The Economist Intelligence Unit



More Good News Than Bad

Growth and Trade Trends

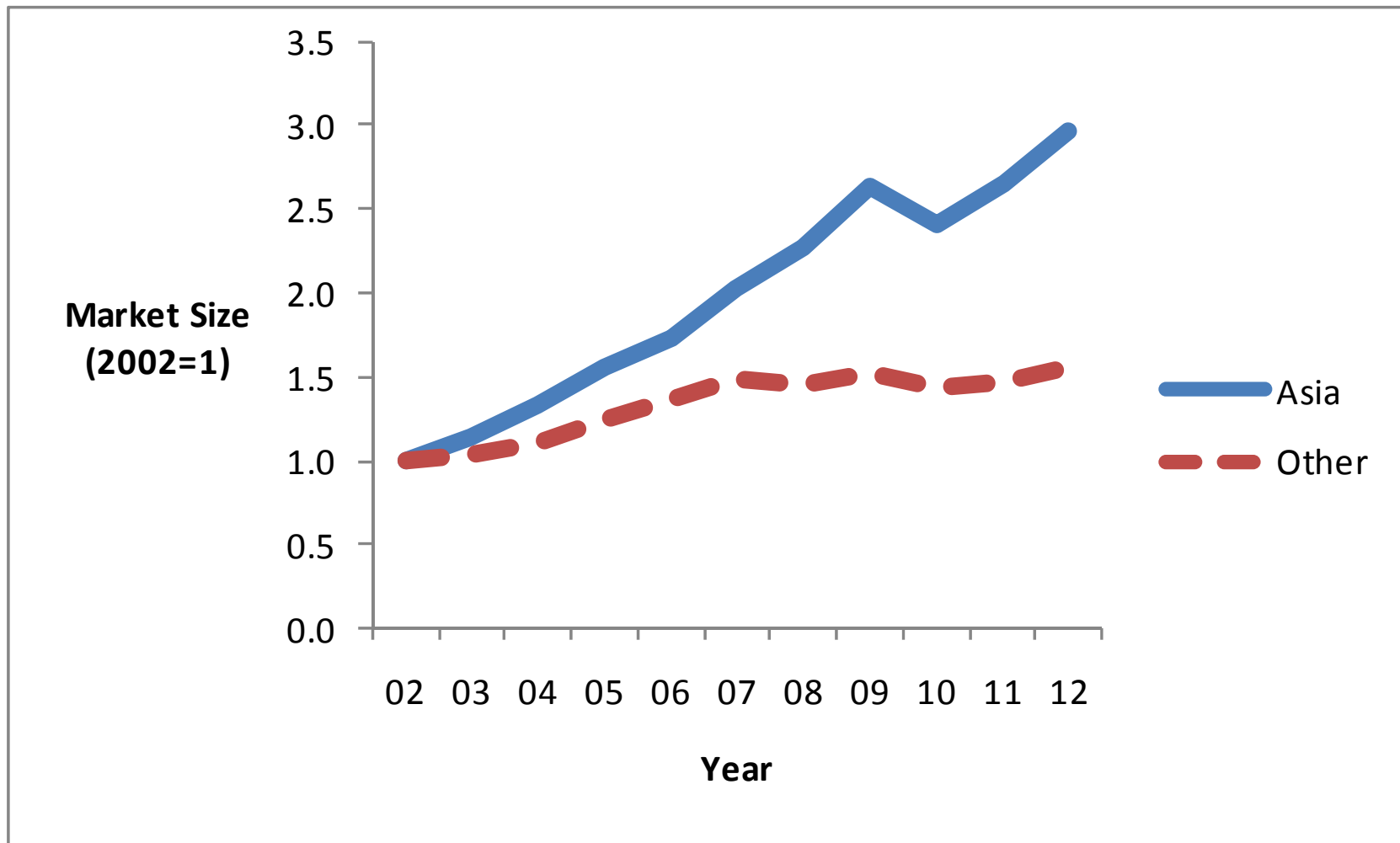


Source: Boston Strategies International adaptation and analysis of data from The Economist Intelligence Unit and other sources.



The Asian Recovery

Sales of Health, Personal Care, Pharmaceutical and Similar Products



Source: Boston Strategies International analysis of data from IHS Global Insight and other sources.



Supply Chain Costs in 2010

Supply Chain Cost Components

Type of Cost	Projected Change October 2009-June 2010
Sourcing costs	1.0%
Transportation	0.9%
Warehouse labor	1.7%
Inventory carrying	0.3%
Obsolescence	0.3%
Production	0.9%
Net Impact	5.0%

Source: Boston Strategies International

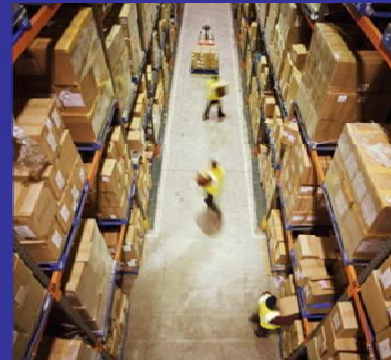
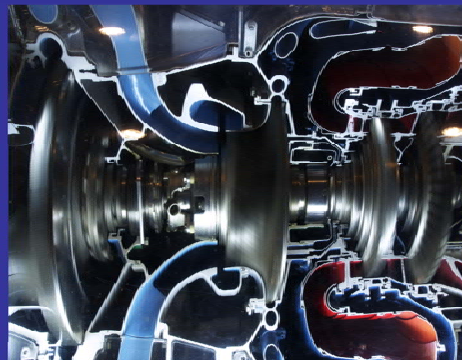


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