



# Personal Care

An essential component of living

Activity Report 2012



**Cosmetics Europe**  
the personal care association

Activity Report 2012  
Personal Care - An essential component of living



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# PERSONAL CARE - AN ESSENTIAL COMPONENT OF LIVING



**FABIO FRANCHINA**  
COSMETICS EUROPE PRESIDENT

**One of the most rewarding aspects of the cosmetics industry is the knowledge that it enriches the lives of citizens on a daily basis. Virtually every person in Europe uses various cosmetics and personal care items every day, be they soaps, toothpastes, deodorants or any of the many other products our industry provides.**

In fact, personal care items add so much to our quality of life it is hard to imagine not using them. They actively contribute to our personal hygiene, our self-esteem, our health and our well-being. In short, they make us feel good about ourselves.

However, our dynamic industry has another important role to play. The European cosmetics business is a global leader. Our industry's investment in European research, development and production of cosmetic products means we are a major employer, a major driver of innovation and a major contributor to the European balance of payments. Our industry employs more than 1.5 million people in Europe, including more than 25,000 scientists. European sales are in excess of 70 billion EUR. All of this makes us an important economic actor in Europe, and we continue to open new markets.

Operating in a globalising world, our industry represents a wide diversity of players: worldwide operating multinational companies alongside thousands of small and medium size companies. They all are driven by the same passion: to bring the best quality to the consumer through creativity and science based innovation and to earn and preserve their trust on a daily basis.

In staying close to the consumer and to the citizen, our industry is acutely aware of societal change. Through our products, we form an intimate relationship with consumers, and we understand and adapt to their needs. Ever higher consumer demands, a diversifying population impacted by global migration, an ageing society with very specific needs for personal care: all pose specific challenges AND opportunities for our industry.

We are understandably proud of our achievements and our leadership as an industry. Despite difficult times, our industry continues to prosper. The drivers are a willingness to listen to our customers and the flexibility to adapt to meet their changing demands. Our commitment to innovation allows us

to create improved products, while our commitment to acting responsibly ensures we deliver in a socially responsible manner.

This approach can only enhance our reputation as an industry and as representatives of that industry. Our stakeholders recognise that we operate as a modern industry should do: we innovate with sustainable solutions as our goal, and in doing so respond equally to our own responsibility as a flagship industry and to the desire of consumers to respect their own health and wellbeing whilst making responsible contributions to society as a whole. We believe that health, wellbeing and self esteem are core elements in our society's evolution and we respond accordingly. That is the ideal basis for a modern, dynamic business sector.

Personal Care: an essential component of living. These are not empty words, but capture the vocation of our industry in a changing society, in which so many are proud to serve the consumer and passionate about doing so.

# INTRODUCTION



**BERTIL HEERINK**  
COSMETICS EUROPE DIRECTOR GENERAL

**Cosmetics Europe – The Personal Care Association: the voice of the European Cosmetics Industry in a changing society.**

The added value of our association is defined by the trust and recognition it earns with members and stakeholders. Its mission to support the development of an innovative, sustainable, competitive and respected industry drives our strategy and operations. Earning public trust, achieving effective public policy and enhancing member value are at the heart of what we do.

Cosmetics Europe is aware of the increased speed and complexity of the issues that face our industry, in Europe and elsewhere. Being pro-active and communicative, bringing solutions, showing understanding for and answering the needs of the consumer, the citizen and the decision maker are decisive elements for the credibility of our organisation, our European and international network.

This is why Cosmetics Europe is investing more than ever in outreach to society, in bringing support to our membership, in building bridges to stakeholders of every kind.

The introduction of a European Regulation for Cosmetics is a decisive step towards creating a strong single level playing field. For the first time, the world's largest personal care market of more than 500 million consumers will be served by a single, harmonised piece of legislation, directly applicable in all the Member States of the European Union, and – no doubt – a source of inspiration for many regions in the world.

This major shift presents opportunities for innovation, consumer protection and competitiveness. Our industry is determined to make it successful and will continue to pursue offering its best expertise in its implementation.

In today's world, voluntary approaches complement regulatory frameworks. Our industry has understood this and has launched a European wide Charter and Guidelines on Responsible Advertising. This initiative was the end result of an intense process of stakeholder dialogue and is currently implemented by our industry across Europe. We are proud to demonstrate our commitment to our consumers' trust in this way.

International collaboration is imperative to the success of our industry. We are not only closely engaged in regulatory

collaboration, but also in creating a basis for strategic communication across the world, together with our international industry partners.

The consequence of this ambitious programme is a constant evaluation of the effectiveness of our organisation. This is why our internal structure was re-evaluated and benchmarked against our mission and goals. Today, we have in place a reviewed structure that will be the "toolkit" for a pro-active, credible and transparent performance across Europe.

In this Annual Report, we take you through the major initiatives and events that marked the year 2012. A year full of economic, political and regulatory challenges for our industry.

There was, however, one continuous element: the passion and the commitment of so many colleagues and counterparts in companies and national associations, who together serve our industry with so much professionalism and dedication.

I wish you a pleasant reading,

A handwritten signature in dark ink, appearing to read 'B. Heerink', written in a cursive style.

# KEYNOTE MESSAGE



**TONIO BORG**

**EU COMMISSIONER FOR HEALTH AND CONSUMER POLICY**

**Cosmetics products are about much more than simply beauty. Virtually every European consumer uses cosmetics products on a daily basis, and they are important components in our self-confidence, our well-being and sometimes even our health. Furthermore, as Europe's population becomes older, cosmetics make an increasingly important contribution in helping to achieve healthy and active ageing.**

Although I held responsibility for this industry for a relatively short period, it has been an interesting time. In summer 2013, a new Commissioner, Neven Mimica of Croatia, takes responsibility for the consumer portfolio. I believe he will find that I am passing him over a sector in robust good health.

In spite of a tough and turbulent economic climate, the cosmetics industry has remained buoyant. Much of this is due to the dynamic and innovative nature of the sector. Some have questioned whether the implementation of the ban on cosmetics containing ingredients tested in animals will slow down the capacity for innovation. It may well pose a challenge, but I believe it will also act as a stimulus for

responsible innovation. An ongoing commitment to research into alternatives to animal testing will be vital. The EU will play its part, having confirmed it will continue funding in this area of research.

Furthermore, our approach demonstrates leadership and encourages the global community to follow the EU approach. Indeed, I have raised the topic of cosmetics - particularly the issue of animal testing - whenever the opportunity arises outside of Europe. I have done so in both India and China in recent months.

An important development for the cosmetics industry will be the entry into force of the new Cosmetics Regulation. This Regulation will strengthen the legislative framework for cosmetics. We are aware of the need to limit red tape; we have no desire to stifle innovation. However, the wellbeing of the consumer must remain paramount in our considerations. Many of the improvements that this change will bring will have direct relevance for consumers. There will be a reinforced safety assessment for cosmetics and provisions on product

claims. Clear and transparent information is the cornerstone of this, and we acknowledge the industry's work on responsible advertising as a positive commitment.

Expectations of society towards cosmetics are constantly evolving. This presents the industry with both a challenge and an opportunity. The challenge is to meet the needs, aspirations and expectations of consumers. The opportunity is to build a stronger, sharper industry at the cutting edge of innovation.

**Tonio Borg**  
*EU Commissioner for Health and Consumer Policy*

# NEW NAME, NEW LOOK, NEW PLACE



## NEW NAME, NEW LOOK, NEW PLACE

In 2012 the organisation celebrated its 50th Anniversary of representing European cosmetics companies and national associations in Brussels.

The anniversary was marked by a new name, a new visual identify and a change of premises. The name 'Colipa' was replaced by a new identity: 'Cosmetics Europe - The Personal Care Association'. This new name reflects the importance of the European industry on the global stage.

The change in identity also saw the launch of a new logo, with the initials of the new name picked out in bronze, with the name below in a serif font. The new logo was picked up in new corporate materials and a redesign of the association website.

In February 2012, the move to the new offices was marked by a ceremony for more than 100 industry stakeholders. The President of Cosmetics Europe, Fabio Franchina, looked to the future of the industry, whilst the Director-General, Bertil Heerink, paid tribute to the achievements of 50 years of member collaboration.



# ACTIVITIES IN 2012

## INTERNATIONAL ACTIVITIES

From an international perspective, the focus remained on four key geographic regions; China, Russia, India and the ICCR countries (International Collaboration on Cosmetics Regulation between the EU, the US, Japan and Canada).

### China

2012 saw significant progress for the European cosmetics industry in China. The application of the 2009 Chinese cosmetics regulation had proved challenging for European companies, leading to a complete breakdown of new product approvals for the majority of 2010. While many elements within the Chinese Regulation build on existing, modern legislative models and are thus compatible with international harmonisation and the reduction of trade barriers, detailed processes and procedures were subject to constant dialogue.

Significant progress has been made on trade facilitation under the leadership of the European Commission (DG Sanco) and the Chinese State Food and Drug Authority (SFDA). Today, registration numbers of new products are exceeding 2009 levels. However, significant challenges remain for the approval of new ingredients, and all innovative products containing them. Cosmetics Europe will continue to work with the SFDA and the European Commission to find practical solutions to overcome the remaining hurdles.

### Russia, Belarus, Kazakhstan

An important event with regard to international convergence in 2012 was the entering into force of the Cosmetics Regulation of the Customs Union of Belarus, Kazakhstan and Russia, creating a harmonised legal framework for a market of close to 170 million consumers. Through our sister associations in Russia, Cosmetics Europe was closely involved in the industry comments on drafts of the regulation and was able to contribute to the generally high compatibility of the regulation with the European system.

### India

India continued to fine-tune its draft revised cosmetics regulation, postponing its entry into force several times since 2010. Cosmetics Europe will continue to monitor developments closely and to provide comments to the Indian authorities. We will also collaborate with DG Trade to ensure a smooth phasing-in of the new legislation, now expected in early 2013.

### ICCR

The International Collaboration on Cosmetic Regulation (ICCR) was created in 2007 as a platform for regulators and industry with participants from the EU, US, Canada and Japan. The ICCR identifies opportunities for concrete regulatory alignment on cosmetics, in particular on topics without the immediate need for changing the respective regulations.

Topics addressed in 2012 included:

- Technical criteria to identify nanomaterials for the purposes of cosmetics regulation
- Criteria to assess the safety of nanomaterials for use in cosmetics
- Framework for management of traces of unwanted substances in cosmetic products
- Proposal for reference safe levels for traces of lead and dioxane
- Collaboration between bodies for validation of alternatives to animal testing
- White Paper on alternative methods with regulatory acceptance in the ICCR countries.

By integrating the international perspective into the daily work of the Cosmetics Europe technical regulatory expert teams and staff, our industry can continue to provide consistent and efficient input to the EU and international debate.



# ACTIVITIES IN 2012

## ALTERNATIVES TO ANIMAL TESTING

Throughout 2012, Cosmetics Europe continued its support for research to develop and validate assessment methods for cosmetic ingredients and products that provide alternatives to animal testing.

The industry co-funds the Safety Evaluation Ultimately Replacing Animal Testing programme (SEURAT), a research initiative operating under the Health Programme of the European Union's 7th Framework Programme. Established in 2011 with a budget of €50 million, the first phase of this collaboration, SEURAT-1, is composed of seven research projects that will run for five years.

At the second Annual Meeting of the SEURAT-1 Research Initiative in Lisbon in February 2012, Cosmetics Europe announced an €8 million extension of its research programme to fund alternatives. This expansion will help fully leverage the effort invested in previous years. Additional funding will help to

sustain momentum and demonstrates the industry's concrete commitment to replacing animal testing with alternative methods as soon as scientifically possible.

The extended programme will focus on:

- Pre-validation of the toolbox test methods for skin sensitisation and data integration activities
- Finalising the development and pre-validation of the 3D-model for genotoxicity, and promotion of its regulatory acceptance
- Refinement of eye irritation assays to address remaining gaps

The industry's continued commitment to alternatives to animal testing (AAT) has delivered real progress, made possible by our investment in research.

- Eye Irritation: The first phase of the Eye Irritation Validation Study, conducted in cooperation with the European Union Reference Laboratory for alternatives to animal testing

(EURL ECVAM), has been completed. The research reported positive results for the Mattek tissue model on liquids.

- Skin Tolerance: The 'Bioavailability/Metabolism' subgroup of the Skin Tolerance Task Force has completed initial scoping and planning and will start project activities in 2013. The next step will be to compare available methods and then begin refining the most promising assays using an *in silico* model.
- Genotoxicity: The transferability and reproducibility phase of the development of a 3D-Comet assay for further reduction of false positive results has been completed. The test system has been successfully refined and the next phase of validation (reproduceability) will begin shortly. A contract has been signed with the German Federal Ministry of Education and Research to enhance efficiency and exploit synergies arising from this genotoxicity research.
- Safety Assessment: Current activities focus on a meta-analysis of the application of new safety assessment techniques.

# ACTIVITIES IN 2012



## AAT ADVOCACY

2012 was an active year for the Alternatives to Animal Testing (AAT) Core Group, meeting frequently to monitor and discuss the implications of EU policymaking.

Following his appointment in November, the European Commissioner for Health and Consumer Policy, Tonio Borg, decided to allow the marketing ban to enter into force in March 2013 as planned. There was no offer of any new legislative proposal to mitigate the impact. The Commissioner indicated continued support for research into alternatives and for promoting the 'EU model' internationally as a leader on alternative approaches.



*“The full animal testing ban is now in place. This will trigger a discussion in the industry on the AAT research programme both on future commitments but also on the ‘what’, the ‘how’ and the ‘where’.”*

*Horst Wenck, Chair of the Strategic Team on Alternatives to Animal Testing*

# ACTIVITIES IN 2012



## SUSTAINABLE DEVELOPMENT

Cosmetics Europe's "10 Steps to Sustainable Development" aims to help cosmetics manufacturing companies, particularly SMEs, to engage in sustainability activities. A practical guide, "How to Apply Lifecycle Thinking to Cosmetic Products" was produced, offering specific advice for manufacturers of shampoos and skin creams.

Sustainable development has moved centre-stage in the cosmetics industry and was the theme of the Cosmetics Europe General Assembly and the topic of a showcase event in the European Parliament.

2012 saw Cosmetics Europe participate in the revision of the Ecolabel criteria for soap, shampoo and hair conditioners. This work is ongoing and revised criteria are expected to be published by the end of 2013.

We also participated in two European Commission public consultations which touch on sustainability: "Delivering more sustainable consumption and productions" in March, and the "7th Environmental Action Programme" in June.

## REACH REGULATION

The implementation of the REACH regulation on chemicals and their safe use is ongoing. The industry engaged on a range of issues including exposure scenarios, specific environmental release categories, downstream user obligations, and communication in the supply chain.

Much of this work was conducted through the Downstream Users of Chemicals Coordination Group (DUCC), a joint platform representing a number of European industries focused on the implementation of REACH and the Classification, Labelling and Packaging (CLP) regulation.

Cosmetics Europe also monitored the industry's state of preparedness for the next REACH registration deadline of May 31 2013, and tracked the progress of the 12 studies carried out on behalf of the European Commission in the context of the review of REACH and the CLP regulation.



# ACTIVITIES IN 2012



## SELF-REGULATION IN ADVERTISING

The Cosmetics Europe Board adopted the Charter and Guiding Principles on Responsible Advertising and Marketing Communications in June 2012. The document embodies the key principles of advertising – to be legal, decent, honest and truthful – and examines areas that might cause concern, including taste and decency, advertising to children, and respect for the human being.

This initiative was developed in close collaboration with a wide network of stakeholders: EU institution representatives, consumer organisations, representatives from the world of advertising and other societal groups.

Turning our pan-European Guiding Principles into concrete changes in advertising practices is key to demonstrating the robustness of our project. Cosmetics Europe members are working on the

implementation of these principles in European countries, tailoring them where necessary to reflect national and cultural expectations.

National associations are provided with support and information designed to facilitate their cooperation with the principles set out in the Charter and Guiding Principles. This implementation process is monitored with great care and will be reviewed in annual monitoring surveys.

This initiative demonstrates our proactive approach to an issue of importance to consumers and stakeholders.

*“The Charter and Guiding Principles sets out the benchmark for the responsible advertising of cosmetic products in Europe. We invite stakeholders and consumers to support our initiative and judge us on our results in the near future.”*

*Loïc Armand, Chair of the Strategic Team on ‘Self-Regulation in Advertising’*

# ACTIVITIES IN 2012

## TECHNICAL REGULATORY

In 2012, the regulatory focus remained on the implementation of the new Cosmetics Regulation. This required strong and intensive collaboration with the European Commission, EU Member States, industry partners and consumer representatives.

A number of important actions were concluded and industry guidance on the following key topics was finalised:

- Roles and responsibilities along the supply chain
- Scope and format of the Cosmetic Product Safety Report and Safety Assessment
- Scope and electronic tools for Product Notification (including Frame Formulations)
- Common criteria for claims
- Definition and labelling of nanomaterials and notification of safety data on nanomaterials
- Practical aspects of the reporting scheme for serious undesirable effects
- Exemption criteria from the ban on CMR substances

The Internet-based Electronic Product Notification Portal (CPNP) was opened on 11 January 2012 and – although not mandatory until July 2013 – received more than 10,000 notifications within six months. This EU-wide notification will replace national schemes, of which there are more than 20. It will offer significant simplification for companies as well as greater transparency and product traceability for authorities

across Europe. However, it needs to be recognised that more work is still needed to ensure the smooth application of the new Cosmetics Regulation.

Cosmetics is the first sector to apply nano-specific requirements. This is a learning experience for industry as well as in-market control authorities. Work on the implementation of nanomaterial requirements for cosmetics continued throughout the year, but remained challenging in the absence of a workable, official interpretation of 'nanomaterial'. The European Commission established a stakeholder working group to examine the possible adjustment of the definition of nanomaterial, along with harmonisation with other sectors. Once regulators have established a revised definition and interpretation, industry will adopt it. For the time being, companies are implementing the requirements according to industry best practice, helped by a set of technical guidance documents prepared by Cosmetics Europe's nanomaterials expert team.

Cosmetics Europe will continue timely communication to members on all aspects of implementation, via the issue management network, the Cosmetics Europe Extranet and specific workshops and information days.

Moving forwards, it will be important that the practical application of this law at Member State level aligns with the

objective of true EU harmonisation. Cosmetics Europe will monitor this closely through its national member network.

### Ingredient Safety

- Cosmetics Europe continued to defend a wide range of safe cosmetic ingredients through submissions of safety data to the EU authorities. The EU's Scientific Committee on Consumer Safety (SCCS) views Cosmetics Europe submissions as being of high scientific quality, responsive to their questions and having a high chance of resulting in a positive regulatory outcome. Emerging horizontal safety issues in 2012 that will set the agenda in 2013 for specific ingredient evaluations include endocrine disruptors, allergy, vulnerable populations and exposure to mixtures and traces.

### Voluntary Industry Standards

- Active participation at the ISO (International Organization for Standardization) and CEN (European Committee for Standardization) Working Groups on Cosmetics led to significant progress in the area of microbiology and sun protection measurement (SPF, UVA), and definitions in the area of natural/organic cosmetics.

### Biocides Regulation

- The revision of the EU Biocides Regulation in 2012 triggered a constructive discussion on the interface between cosmetics and biocides, which ultimately confirmed the wide scope of the cosmetic product definition.

# ACTIVITIES IN 2012

## LEGAL AFFAIRS

Cosmetics Europe and its members are committed to transparency and full compliance with all applicable competition law requirements. The work of the Legal Affairs Department demonstrates this commitment through its continued implementation of our competition compliance policy.

Our team is also active in assisting and supporting the activities of Cosmetics Europe by providing ongoing support for several other departments and strategic project teams. These include the revision of the EU Biocides Regulation, legal interpretation of provisions on nanomaterials, the shaping of consortia and continued support to members on the interpretation of the European legislative framework for cosmetics and borderline situations.

The Department, in partnership with the Strategic Project Team for Selective Distribution Channels, actively monitors the application of the rules relating to 'selective distribution' under the EU Commission's vertical block exemption regulation.

*“Good compliance, sound legal foresight and the bringing of practical solutions contribute to our industry's licence to operate”*

*Emma Trogen, Legal Affairs Director*



# ACTIVITIES IN 2012



## COMMUNICATIONS AND PUBLIC AFFAIRS

The Communications and Public Affairs function is the hub of Cosmetic Europe's relationship with our stakeholders, both internal and external. As the gatekeepers and facilitators of our strategic dialogue with the widest range of our audiences, we work in partnership with members to enhance the trust in and reputation of our industry.

In a year of intense activity, the team has supported and guided members and colleagues on a range of communications and advocacy projects. The transition to our new identity as Cosmetics Europe and the celebrations surrounding our 50th anniversary were marked with high visibility events and materials. The association's strong relationships within the European Institutions were built upon with Parliamentary exhibitions and events which opened constructive debate around

issues such as innovation and responsibility. We have continued to maintain and develop key contacts with European decision makers, NGOs, and our counterparts in related industries, with the result that cross-industry alliances have been strengthened to ensure better understanding and co-operation on nanotechnology, endocrine disrupting chemicals and fragrance allergens.

In order to better serve our members' needs, the speed and clarity with which we share key information has been improved with the introduction of two weekly newsflashes on industry wide news and developments, and advocacy activities which impact upon our industry. This is but the beginning of a range of initiatives moving forwards which will ensure that we constantly strengthen our network through timely and targeted briefing.

*"A coherent voice for our industry which shapes our strategic direction whilst responding to behavioural and economic change: that is our central goal, and it underpins our commercial strength and our societal value".*

*Virginia Lee, Director of Communications and Public Affairs*

# COSMETICS EUROPE EVENTS IN 2012



## SCIENCE, BEAUTY AND CARE: LOOKING TO FUTURE GENERATIONS

In May 2012, Cosmetics Europe organised a major exhibition in the European Parliament: “Science, Beauty and Care: Looking to Future Generations.” The exhibition was sponsored by Françoise Grossetête, MEP, and featured a keynote speech from Lazlo Andor, Commissioner for Employment, Social Affairs and Inclusion.

The exhibition offered visitors an opportunity to use interactive technology to visualise themselves at different stages of their lives – from babyhood to old age – with the differing personal care needs. Visitors could also test their hand hygiene, learn how to brush their teeth correctly and see synthetic skin designed to avoid the need for animal testing.

The exhibition was complemented by a dinner in the European Parliament sponsored by Elisabeth Morin Chartier, MEP. The event showcased the work of ‘Look Good, Feel Better’, an organisation dedicated to helping cancer patients regain and maintain their self-esteem through the effective use of cosmetics.



# COSMETICS EUROPE EVENTS IN 2012



## COSMETICS EUROPE GENERAL ASSEMBLY: 50TH ANNIVERSARY

The 2012 Annual General Assembly represented a significant milestone for Cosmetics Europe, marking its 50th anniversary. The theme for the assembly, held in Brussels, was 'Science, Beauty and Care: Enriching society for Future Generations'.

The centrepiece of the Assembly events was a debate held in the Solvay Library, entitled "Challenges and Opportunities for the Cosmetics Industry". The event opened with an address by the Vice-President of the European Commission, Antonio Tajani. The subsequent debate, featuring viewpoints from global business leaders, was chaired by BBC journalist Jonathan Dimbleby.

As part of a special celebration to mark the 50th anniversary of the organisation, delegates were invited to a Gala event at the Beaux-Arts building. The event featured the closing gala concert of the 75th edition of the Queen Elisabeth International Music Competition, under the patronage of Her Majesty Queen Fabiola of Belgium.



# COSMETICS EUROPE EVENTS IN 2012



## SELF-REGULATION IN ADVERTISING

On 14 November 2012, Cosmetics Europe organised a lunchtime debate in the European Parliament, sponsored by MEPs Britta Thomsen and Barbara Matera. This platform showcased the cosmetics industry's initiatives in the area of advertising self-regulation, and the adoption of the 'Charter and Guiding Principles of Responsible Advertising and Marketing Communications'.

The event attracted more than 40 attendees, including representatives from the European Parliament, the European Commission, the cosmetics industry, NGOs and advertising stakeholders.

Using the theme: 'Beauty in Advertising: a responsible approach?' the speakers and audience shared their perspectives on the importance of responsible advertising and the value of the cosmetics industry's commitment to this through its Guiding Principles.

Speakers included both sponsoring MEPs, Leanda Barrington of the European Women's Lobby, Loic Armand, Chair of the Cosmetics Europe Strategic Project Team on Self-Regulation on Advertising, and Isabelle Martin, a member of the Strategic Project Team.

All speakers highlighted the impact of advertising on consumers, and the need to ensure advertising that recognises and respects consumers' self-esteem. There was whole-hearted endorsement for the industry for its proactive approach and commitment to responsible advertising.



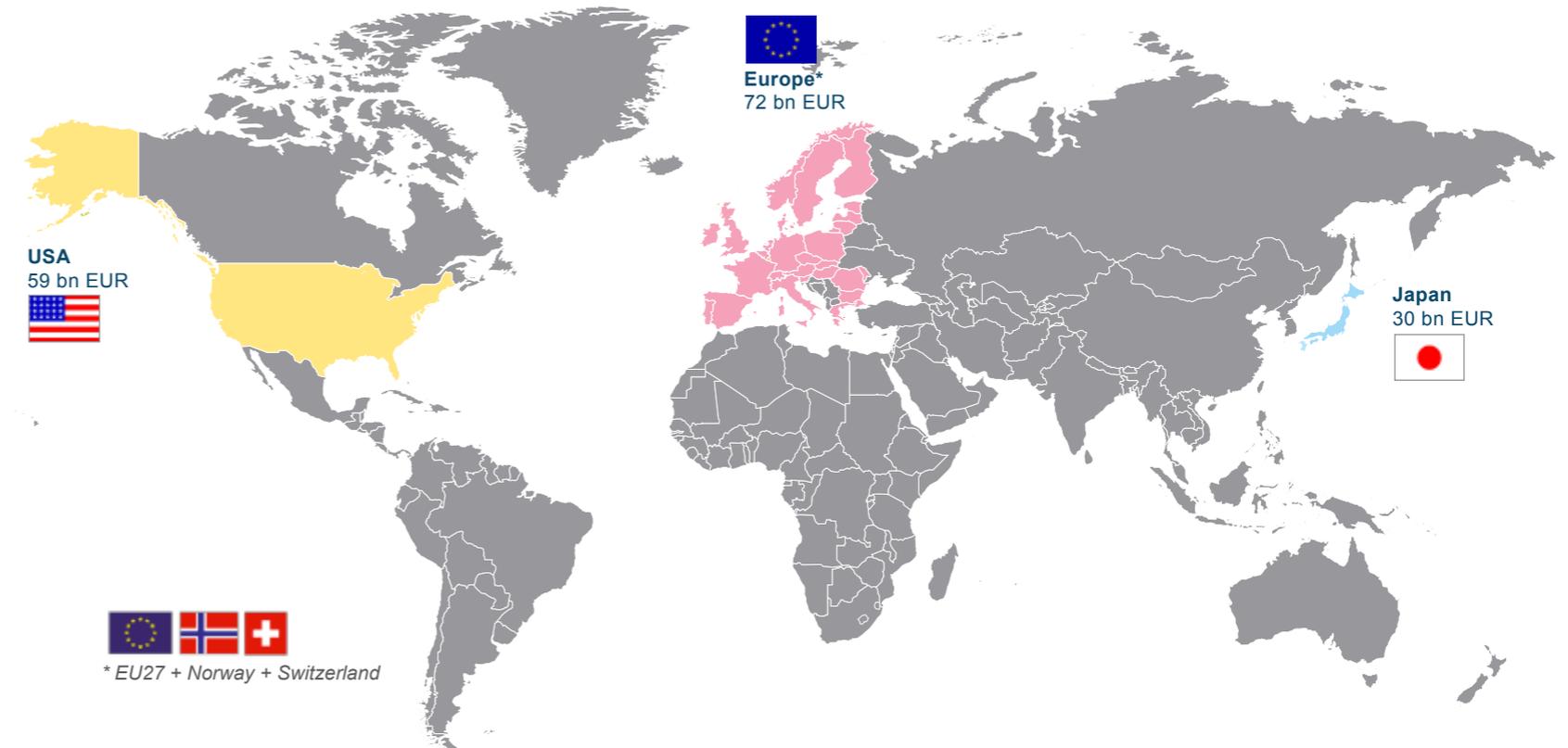
# THE EUROPEAN COSMETICS MARKET 2012

The European cosmetics industry is a flagship industry, with a value of more than EUR 72 billion. This makes it the world leader by a considerable margin, almost as large as the US and Japanese markets together.

## Global Cosmetics and Toiletries Market\* Value comparison of European, USA and Japanese markets in 2012

Europe remains the largest producer of cosmetics; European sales are almost 40% higher than the US and more than double that of Japan.

\* Sources: Kline & Company Inc. (USA), Japan Cosmetic Industry Association (JCIA), Japan Dentifrice Manufacturers' Association (JDMA), Japan Soap and Detergent Association (JSDA), Cosmetics Europe Statistics Working Group, assuming a MSP /RSP conversion factor of 1,9



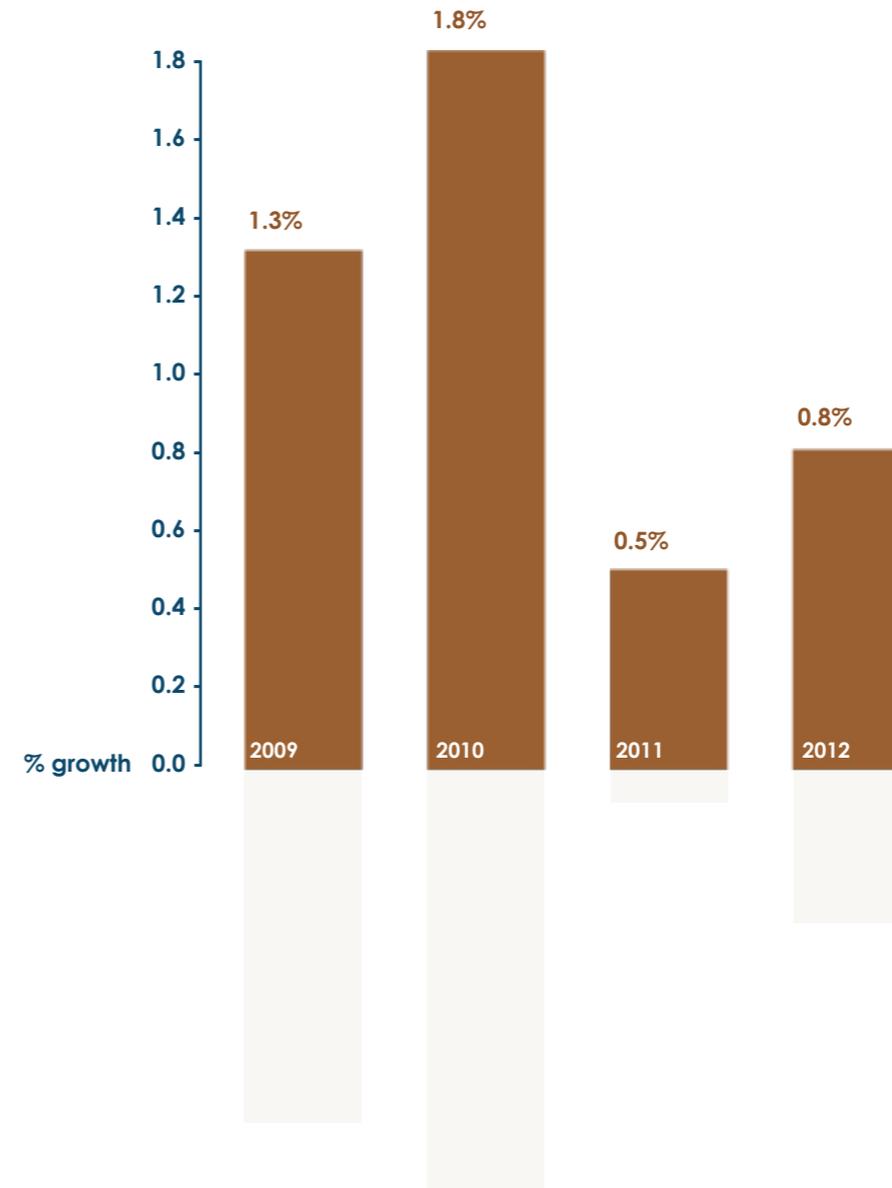
# THE EUROPEAN COSMETICS MARKET 2012

## Global Cosmetics and Toiletries Market\*

Annual Growth 2010-2012 (EUROS at RSP)

The economic climate globally remains difficult. Despite this, the European cosmetics industry continues to grow in real terms; latest estimates predict an increase of 0.8% over 2012.

\* Source: Cosmetics Europe Statistics Working Group



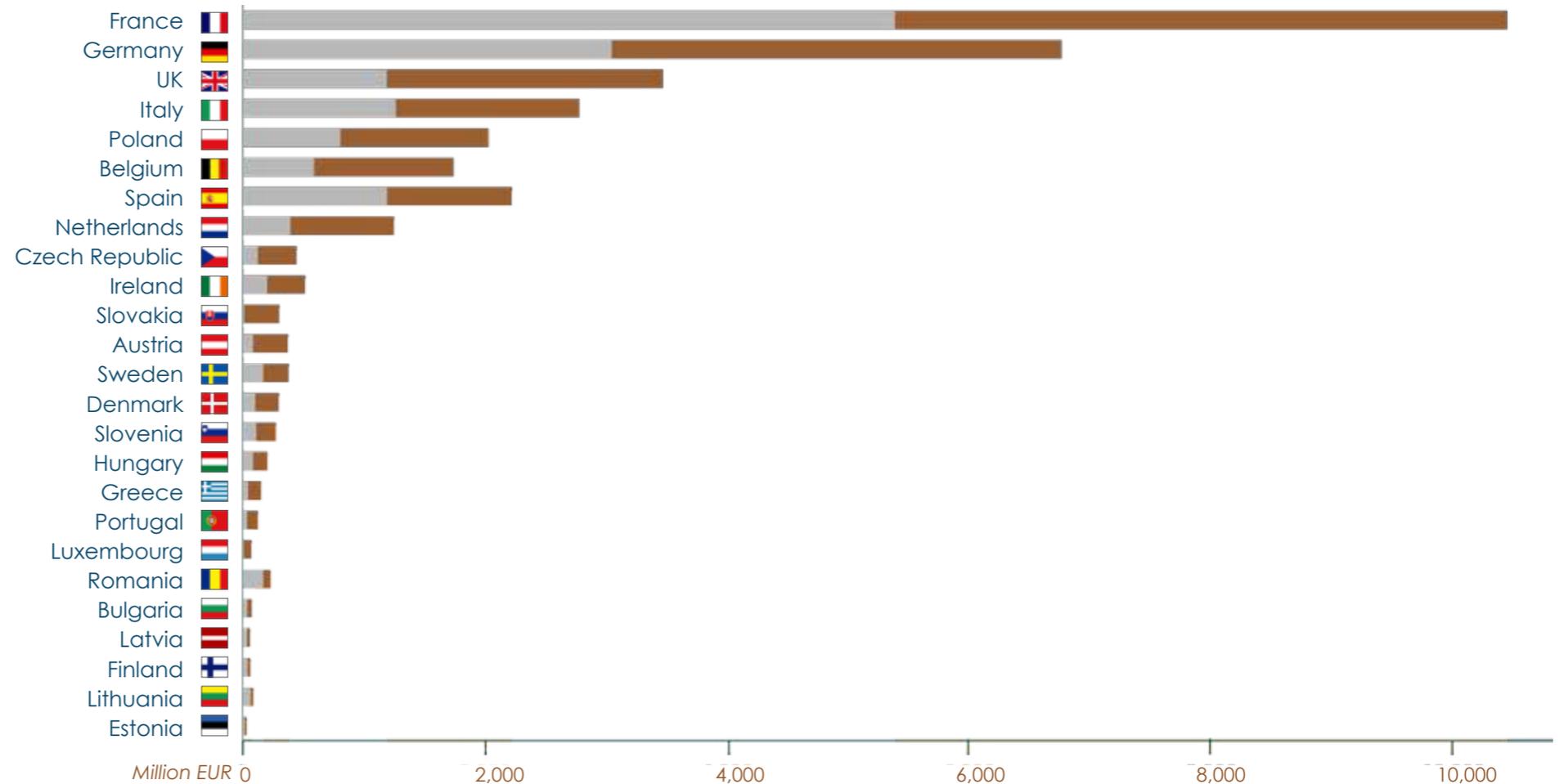
# THE EUROPEAN COSMETICS MARKET 2012

## EU beauty and personal care industry exports\*

Exports continue to be a core strength, accounting for more than one third of all production.

\* Source: Eurostat

Extra export  
 Intra export



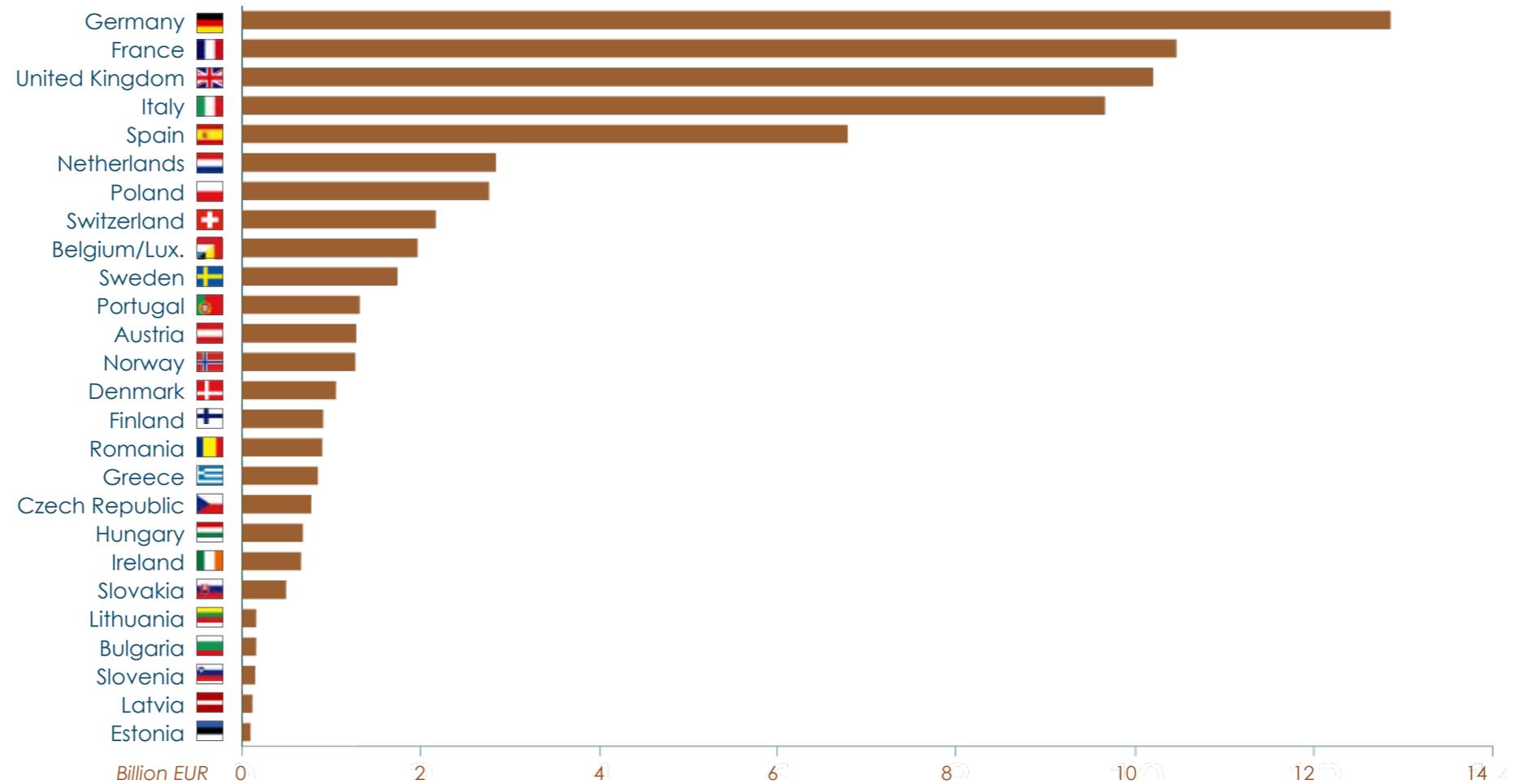
# THE EUROPEAN COSMETICS MARKET 2012

## European Cosmetics & Toiletries Market 2012\*

Market Volume in Bn EUROS by country  
RETAIL SALES PRICES (RSP)

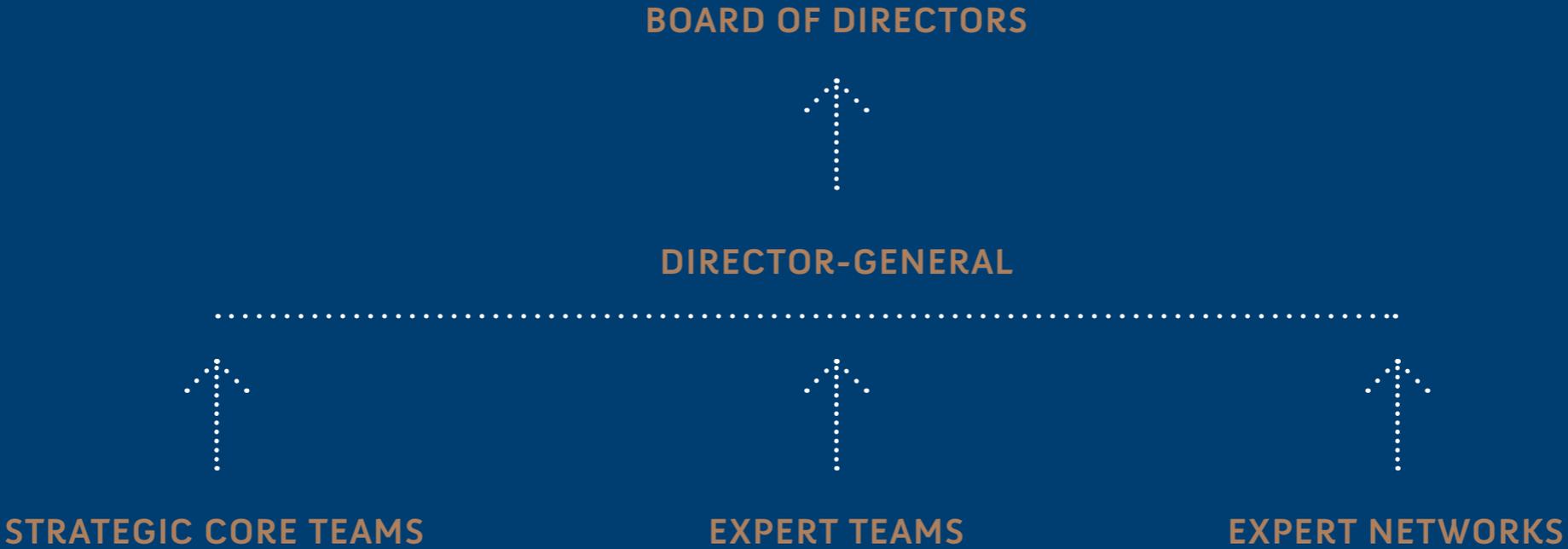
In the European market, demand for cosmetics and personal care items continues to hold up well. In spite of financial pressures, purchases of cosmetics and toiletries have remained constant. This underlines the public perception of personal care items as essential components of living, not luxuries.

\* Source: Cosmetics Europe Statistics Working Group



# COSMETICS EUROPE

## STRUCTURE



# COSMETICS EUROPE

## MEMBERS

### ACTIVE CORPORATE MEMBERS (ACM)

Beiersdorf  
Chanel SAS  
Colgate-Palmolive  
Coty  
Elizabeth Arden  
Estée Lauder Companies  
GlaxoSmithKline  
Henkel  
Johnson & Johnson  
Kanebo (Kao Group)  
L'Oréal  
LVMH  
Pierre-Fabre Dermo-Cosmétique  
Procter & Gamble  
Shiseido  
Unilever

### SUPPORTING CORPORATE MEMBERS (SCM)

Avon Cosmetics  
Oriflame  
Revlon

### ACTIVE ASSOCIATION MEMBERS (AAM)

**Austria:** FCIO - Fachverband der Chemischen Industrie Österreichs  
**Belgium:** DETIC - Association Belgo-Luxembourgeoise des producteurs et des distributeurs de savons, cosmétiques, détergents, produits d'entretien, d'hygiène et de toilette, colles, produits et matériel connexes  
**Bulgaria:** BNAEOPC - Bulgarian National Association Essential Oils, Perfumery and Cosmetics  
**Czech Republic:** CSZV - Czech Association for Branded Products  
**Denmark:** SPT - Brancheforeningen for Sæbe, Parfume og Teknisk/Kemiske artikler  
**Estonia:** FECl - Eesti Keemiatööstuse Liit  
**Finland:** TY - Teknokemian Yhdistys Teknokemiska Föreningen  
**France:** FEBEA - Fédération des Entreprises de la Beauté  
**Germany:** IKW - Industrieverband Körperpflege- und Waschmittel  
**Greece:** P.S.V.A.K. - The Hellenic Cosmetic, Toiletry and Perfumery Association  
**Hungary:** KOZMOS - Association of Hungarian Cosmetics, Detergents and Cleanser Industries  
**Ireland:** ICDA - Irish Cosmetic, Detergents & Allied Products Association  
**Italy:** UNIPRO - Associazione Italiana delle Imprese Cosmetiche  
**Latvia:** LAKIFA - Association of Latvian Chemical and Pharmaceutical Industry

**Lithuania:** LIKOCHEMA - Lithuanian Cosmetics and Household Chemicals Producers Association  
**Luxembourg:** DETIC - Association Belgo-Luxembourgeoise des producteurs et des distributeurs de savons, cosmétiques, détergents, produits d'entretien, d'hygiène et de toilette, colles, produits et matériel connexes  
**The Netherlands:** NCV - Nederlandse Cosmetica Vereniging  
**Norway:** KLF - Kosmetikkleverandorenes Forening  
**Poland:** PACHCP - Polish Association of Cosmetics and Home Care Products Producers  
**Poland:** PUCI - The Polish Union of Cosmetics Industry  
**Portugal:** AIC - Associação dos Industriais de Cosmética, Perfumaria e Higiene Corporal  
**Romania:** RUCODEM - Romanian Union of Cosmetics and Detergent Manufacturers  
**Slovakia:** SZZV - Slovak Association for Branded Products  
**Slovenia:** KPC - Association of Cosmetics and Detergents Producers of Slovenia (part of the Association of Chemical Industries)  
**Spain:** STANPA - Asociación Nacional de Perfumería y Cosmética  
**Sweden:** KTF - Kemisk-Tekniska Leverantörförbundet  
**Switzerland:** SKW - Schweizerischer Kosmetik- und Waschmittelverband  
**United Kingdom:** CTPA - Cosmetic, Toiletry & Perfumery Association

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**CTFA** - The Cosmetic, Toiletry and Fragrance Association of South Africa

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**Russia:** PCAR - Perfumery and Cosmetics Association of Russia  
**Serbia:** KOZMODET - Association of Detergents and Cosmetics Producers and Importers of Serbia  
**Turkey:** KTSD - Cosmetics & Cleaning Products Industry Association

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\* *Mentor on behalf of the Board of Directors*

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*Members:*

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Dr France Boyer - Pierre-Fabre Dermo-Cosmétique

Mr François Cottard - L'Oréal

Ms Nilgün Dayioglugil - Avon Cosmetics

Dr Paul Matts - Procter & Gamble

Dr Emma Meredith - CTPA

Ms Isabelle Orquevaux - FEBEA

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Dr Frank Schwanke - Beiersdorf

# COSMETICS EUROPE

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*Members:*

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Mr Pascal Bayce - Chanel SAS

Dr Dominique Castelli - Johnson & Johnson

Mr Richard Cubberley - Unilever

Ms Nathalie David - Chanel SAS

Ms Ligia Delacruz - GlaxoSmithKline

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Dr Amanda Long - Avon Cosmetics

Dr MaryAnn Mckeever-Alfieri - Estée Lauder Companies

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Dr Klaus Rettinger - IKW

Dr Kim Rich - Procter & Gamble

Dr Coralie Robert - LVMH

Mr Teppei Usami - Shiseido

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Dr Barbara Wolf - Estée Lauder Companies

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Dr Odile De Silva - L'Oréal

Dr Marie-Eve Debrue - DETIC

Dr Stefano Dorato - UNIPRO

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# COSMETICS EUROPE

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# COSMETICS EUROPE

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**Corentin Bondroit**  
*IT Technical Support*

# COSMETICS EUROPE

## MISSION AND GOALS

### Our Vision

The cosmetics, perfumery and personal care industry and products contribute significantly to individual and social well-being in everyday life.

### Our Mission

Our mission is to support the development of an innovative, sustainable, competitive and respected cosmetics industry in Europe, which best serves consumers.

### Our Goals

As the single, recognised voice of European cosmetics, perfumery and personal care, COSMETICS EUROPE must:

- Earn public trust by fostering transparent and reliable relationships with public authorities and stakeholders. This enables it to communicate most effectively the social and economic relevance of the cosmetics industry in terms of satisfying consumer needs.
- Achieve effective public policy by actively shaping workable and fair policy frameworks regulating the industry. To this end, proactive and effective networking and communication are of the essence. Opportunities for achieving alignment on an international scale should be created and optimised.
- Enhance member value by addressing their needs in an efficient and transparent way through timely information and decision making processes. Focus on the issues and activities important to members. Make best use of members' expertise and dedication in order to optimise efficiency and one-voice positions.

## Cosmetics Europe - The Personal Care Association

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