



Cosmetics Europe
the personal care association

ANNUAL REPORT

2015

We personally care



Celebrating 40 years of
EU cosmetics legislation

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The Year in Review and a Perspective on the Future



Optimism prevails despite trying circumstances

2015 was a challenging year for the European Union. Our economy stuttered overall, despite some markets and sectors performing well, while humanitarian crises and the debate over membership in one of the most prominent member states, the UK, drove many to question the wellbeing of the EU overall.

Meanwhile, our industry continued to adapt to meet the needs of a changing world. A combination of factors such as globalisation, digitalisation and the need for greater sustainability are reshaping consumer behaviour with regard to cosmetics and personal care products. In response to changing needs and expectations, we have to continue to deliver products of the highest quality and safety, while remaining acutely conscious of the need to protect resources. Our industry cannot stand still.

However, we remain proud and optimistic both for the EU as a whole and our industry specifically.

The European cosmetics and personal care industry is the flagship of the cosmetics industry worldwide and represents much of the best our continent has to offer. Now worth €77 billion, we continue to grow and to make a sizeable contribution to the European economy. We export more than €17 billion worth of our products every year, including sizable volumes from countries strongly affected by the Euro crisis, like Spain and Italy. We remain a major employer, providing over 2 million jobs across the EU. And while many cosmetics manufacturers are household names, less well known is the fact that our industry's success is also powered by 4605 SMEs.

As proud as we are of these contributions, it is the underlying characteristics of our business that makes us hopeful for a bright future.

Meeting evolving consumer demands and remaining competitive in a fast-changing and globalised world demands constant innovation, and in this respect we stand out. We are science-driven and our investment in R&D remains substantial. This relentless commitment to innovation helps ensure that product design and safety are in a state of constant evolution, and consequently, that we continue to generate growth and jobs in the EU.

In parallel, European cosmetics legislation, which is now in its 40th year, is a model for the world, helping both to ensure consumers are properly protected and to facilitate trade in the EU.

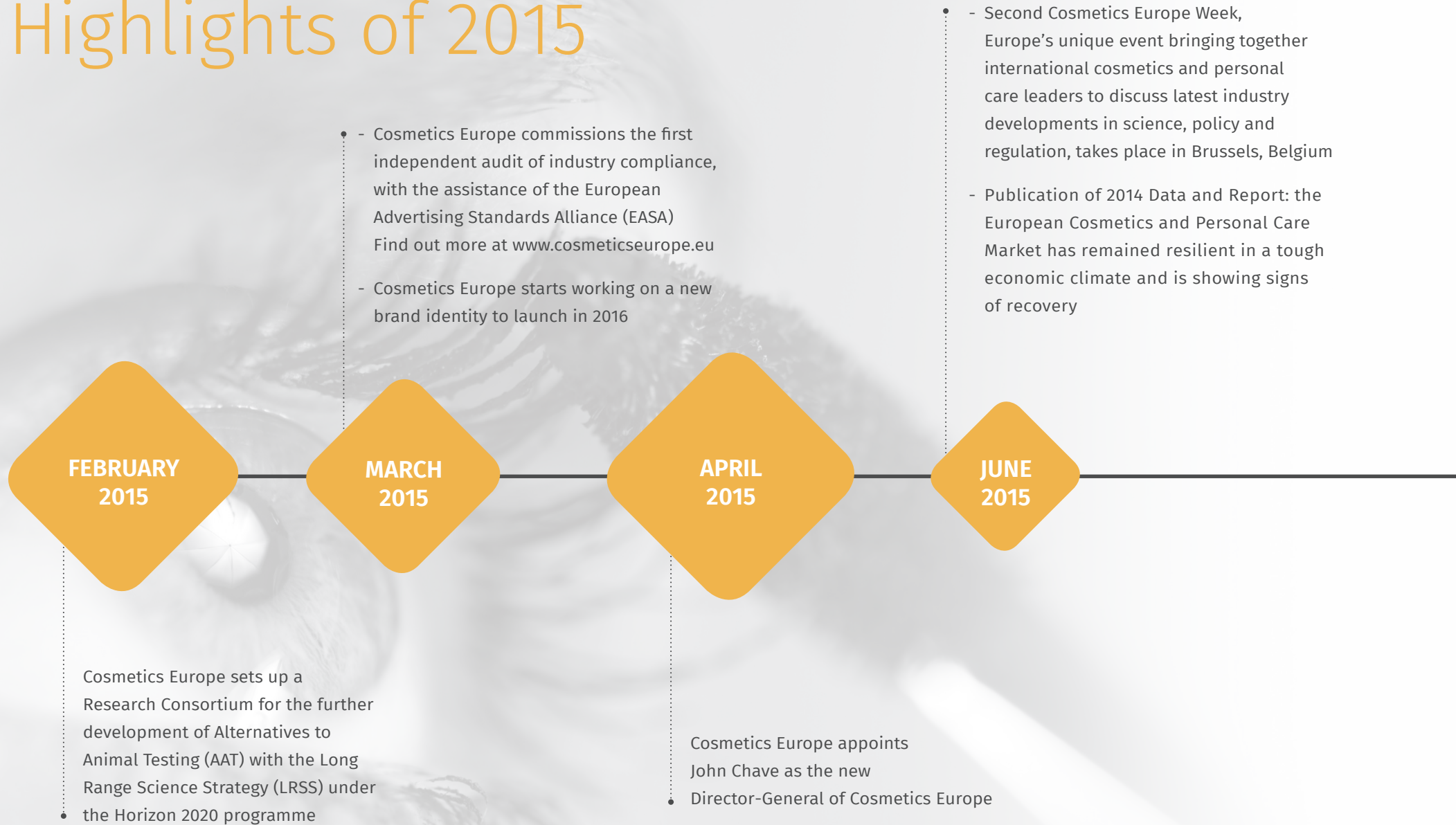
2015 was an exceptionally busy year for our association, in Europe and beyond. Our annual report describes some of the key areas in which we were active, including subjects as diverse as sustainable development, alternatives to animal testing, international cooperation, and new regulatory developments.

As an association, we strive to be as dynamic and forward-looking as the industry that we are proud to represent. 2016 promised to be an intense year, with a number of new developments in the regulatory, policy and scientific arena.

2016 also represents 40 years of EU cosmetics legislation, and at Cosmetics Europe Week 2016 we will celebrate this landmark. We will examine how the regulatory environment we have now is coping, and we will seek to anticipate how regulation might evolve in the future. Our goal is to ensure that our industry remains well placed to meet the challenges of the future, and that it continues to be an icon of European industry.

John Chave
Director-General, Cosmetics Europe

Highlights of 2015



**SEPTEMBER
2015**

Cosmetics Europe in collaboration with the European Union Reference Laboratory for Alternatives to Animal Testing (EURL-ECVAM) achieves the adoption of the new OECD test guideline 492. This great achievement is the outcome of the Eye Irritation Validation Study (EIVS).

**OCTOBER
2015**

Cosmetics Europe recommendation to discontinue in wash-off cosmetic products placed on the market as of 2020 : The use of synthetic, solid plastic particles used for exfoliating and cleansing that are non-biodegradable in the marine environment. Find out more at www.cosmeticseurope.eu

**NOVEMBER
2015**

- Cosmetics Europe signs collaboration agreement on safety assessment with the China National Institute for Drug Control, UK Home office and European Chamber of Commerce in China and co-organises the first Safety Assessment Course in China
- The European Commission and Cosmetics Europe hosts the 9th International Cooperation on Cosmetics Regulation (ICCR-9) meeting in Brussels, Belgium.

**DECEMBER
2015**

SEURAT-1 – Towards the Replacement of In Vivo Repeated Dose Systemic Toxicity Testing (2010-2015) – showcases its achievements during a final symposium. This is the single largest Private-Public Partnership initiative in the field.

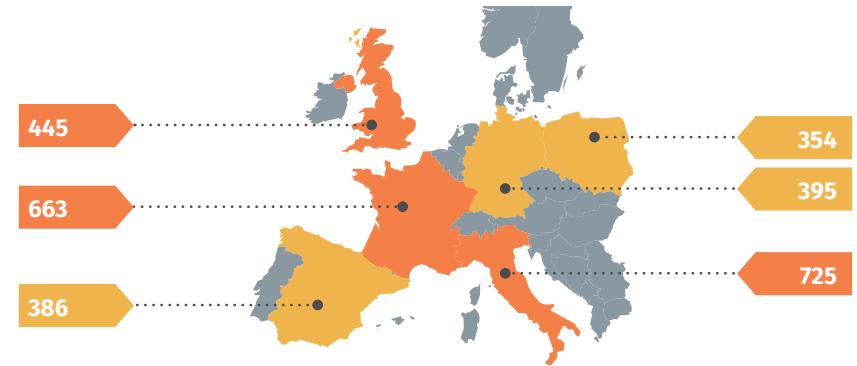
Socio-economic Contribution of the European Cosmetics Industry

SMEs & big companies are key drivers of innovation & economic growth in the industry

4605 SMEs The number is growing

+100 companies manufacturing cosmetics ingredients
20,100 enterprises involved in the wholesale of cosmetics
45,700 specialist stores retailing cosmetics
500,000 hairdressing and beauty salons

Italy, France & the UK have the largest number of SMEs; followed by Germany, Spain and Poland



The industry supports millions of European jobs up & down the value chain

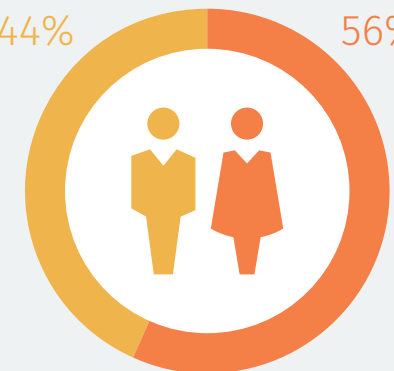
At least
2 MILLION JOBS
across the EU



179,000
people employed directly
1.55m
people employed indirectly

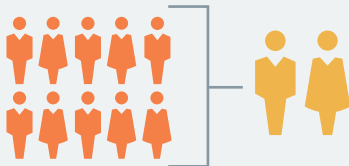
THE INDUSTRY IS CONSTANTLY TAKING STEPS TO INCREASE DIVERSITY & EQUALITY IN THE WORKPLACE

Male 44% **Female** 56%



152,000 total employment in the manufacture of cosmetics

Every 10 workers employed by the industry will support **two jobs** in the value chain

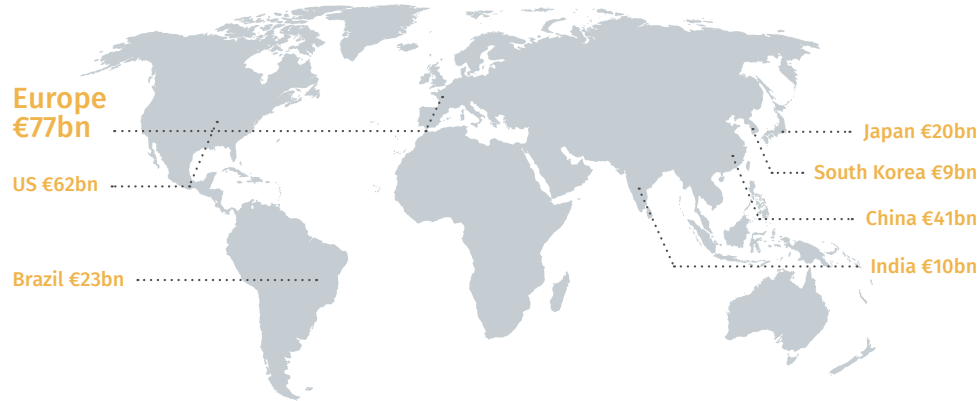


~1,000,000
people active in the hairdressing sector

7,000 people employed directly in the fragrance industry



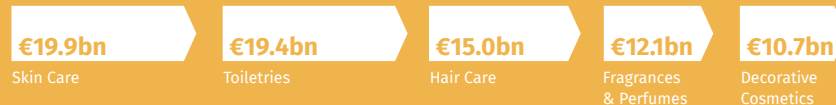
Europe is the global flagship producer of cosmetic products



> 33bn
trade in cosmetic
products & ingredients
within the EU30

17.2bn
total exports of cosmetic
products from Europe
(i.e. extra EU-28)

Skin care & toiletries: largest share of the European market



France & Germany:
Europe's main exporters
53% of total global exports
from Europe

A science-driven & highly innovative industry



Expenditure
on R&D in
Europe
€1.27bn

At least **33 scientific
innovation facilities** in
Europe
> 26,000 scientists
employed in the sector



2014/15 - Shampoos: the most active
area for innovation (globally)
19% of all beauty innovation activity

The industry is about taking care of people

60%: positive impact
on well-being, image,
self-confidence & mood



>40%: benefits in social,
love, family & professional life & health

33% women: hard to live without
foundation or concealer

25% men: hard to live without aftershave

88% people: hard to live without cosmetics



Handwashing with soap: reduces risk
of diarrhoea by **~44-47%**
& acute respiratory illness by **23%**

The industry places a strong emphasis on ensuring environmental responsibility and supporting proactive voluntary and self-regulatory initiatives

2015 Cosmetics Europe recommendation to discontinue the use of solid plastic micro particles in wash off cosmetic products for cleansing and exfoliating uses

2012 Charter & Guiding Principles on responsible advertising & marketing communication
2015 first independent audit by the European Advertising Standards Alliance

Striving for International Regulatory Convergence and Global Competitiveness

Europe remains the foremost producer and consumer of cosmetic and personal care products in the world, accounting for €77 billion of a global market of at least €210 billion. Our domestic market remains strong, though it is highly mature. Opportunities emanating from shifting consumer demands and new niches represent some prospect for growth, and significant opportunities lie in emerging markets, where market growth is high and constant.

Globalisation is one of the hallmarks of our changing world. For the cosmetics and personal care industry, a key impact of this force is that it grants consumers across the globe access to information about our products, and increasingly, the ability to purchase them. The quality and safety of European cosmetics and personal care products, and the persistent strength of our brands, represent a significant business opportunity in emerging markets in particular.

Our share of the global market is indeed growing. However, regulatory complexity remains an obstacle to global competitiveness. A fragmented regulatory framework for cosmetic products across the globe can limit the full economic potential of a global market place, resulting in additional cost and duplication for the European industry.

For this reason, we are working hard with partners across the globe to seek regulatory convergence wherever possible. This remains one of our key goals. If regulatory systems in our main export markets are compatible with the EU system, this greatly facilitates access and competitiveness. We continue to encourage others to use the EU Cosmetics Regulation as an inspiration for their own legislation and are pleased to note that many emerging markets, including ASEAN, Russia, Latin America and China, have indeed done so.

Cosmetics and TTIP: reduced short-term scope but high hopes for future regulatory convergence

TTIP presents an excellent opportunity to resolve regulatory divergences that create unnecessary barriers to trade between the EU and the United States.

Tariff barriers largely do not hinder trade between the two markets. Obstacles are of a non-tariff, regulatory nature. For instance, a large number of product types that are considered cosmetics in the EU are deemed to be Over the Counter Drugs (OTC) in the US. As a result, products that are recognised as safe and compliant in the EU need to undergo long and costly testing, registration and labelling changes in the US.

The cosmetics industries on both sides of the Atlantic originally proposed to address these barriers, while not compromising high levels of consumer protection prevalent in both markets. Although industry recommendations included ambitious proposals for regulatory alignment, it became clear early on that neither EU nor US cosmetics regulators had the mandate to negotiate agreements in TTIP that would require regulatory change.

Regulatory change for cosmetics was only considered under a “future regulatory cooperation” commitment. The cosmetics chapter is in this respect not different from other industries under discussion in TTIP. Although this reduces the opportunities for an economically impactful short-term outcome, we believe the building blocks can create the basis for improved future collaboration, which in time will reduce barriers.

Our industry proposes to go further and create a dedicated US-EU Regulatory Cooperation forum on cosmetics and personal care products. Whichever system eventually prevails, TTIP will at least have created a forum in which it will become far easier to achieve meaningful progress on regulatory convergence between the US and EU.



Regulatory reform in China: improved efficiency and transparency on the horizon

China remains an absolute key growth market. Its cosmetics market is already at €41 billion and is still growing +10% annually. Although Chinese domestic brands compete strongly in low-end market segments, non-Chinese brands retain a +70% market share in the key, faster growing special cosmetics and luxury sectors.

Although our industry has traditionally faced challenges due to the complex Chinese legislative landscape, including both regulatory and administrative hindrances, the outlook is positive. In line with overall reform trends, China would like its cosmetics industry to be more competitive and is undertaking major reforms of its cosmetics legislation in 2016.

The European Commission and Cosmetics Europe can play a role through technical collaboration on cosmetics. A formal dialogue was established between the European Commission and China Food and Drug Administration (CFDA) in 2010 and has since resulted in a Memorandum of Understanding, which includes Cosmetics Europe as technical experts. It is our belief that our collaboration can contribute to making the new Chinese cosmetics legislation more effective, predictable and transparent, to the benefit of European cosmetics and personal care companies, as well as local competitors. Also in line with recent reforms, Cosmetics Europe signed a collaboration agreement on safety assessment with the China National Institute for Food and Drug Control, UK Government and European Chamber of Commerce in China. This is a significant step towards future acceptance of alternative methods in cosmetics safety assessment in China.

Alternatives to animal testing: ensuring EU regulation is well understood

Following the introduction of animal testing and marketing bans in the European Union in the specific area of cosmetics, other countries have expressed an interest in similar measures.

It is essential that countries gain an accurate understanding of the current EU regulatory framework if they are to introduce similar measures without incurring risks to safety. In light of this, Cosmetics Europe collaborated with its international partner associations in 2015 to develop explanatory documents about the legislation and its nuanced interpretation by the European Commission.

Co-hosting ICCR 9: furthering global co-operation on common issues

The European Commission and Cosmetics Europe hosted the 9th meeting of the International Cooperation on Cosmetics Regulation (ICCR-9) in Brussels in November 2015. The ICCR provides a forum for industry and regulatory authorities to discuss pertinent issues, aiming to maintain the highest level of consumer protection while minimising barriers to international trade.

Brazil, Canada, the European Union, Japan and the United States participated as full members, with representatives from China, Saudi Arabia, South Africa and Thailand attending as observers. Positive outcomes included: endorsement of the FAQs on Preservatives in Cosmetics, highlighting the role and importance of preservatives for the global cosmetics sector and laying the ground for future awareness-raising amongst stakeholders and consumers; agreement on the importance of working on international standards and to conduct a comprehensive review in the near future; and the re-integration of unavoidable traces into the ICCR process following the European Commission's announcement of a new process to review work on the issue.

The USA's delegation will welcome the 10th round of the ICCR in Washington DC in 2016.

Gerald Renner, Director Technical Regulatory Affairs, Cosmetics Europe



Working with the EU Cosmetic Products Regulation

In the summer of 1976, the first European Directive on cosmetic products was finalised. Its goal was to facilitate the free movement of cosmetic products across the Common Market by removing incompatible national laws, and eventually succeeded in making ours one of the first industries to truly profit from a single market.

40 years and 7 versions on, we have by far the most sophisticated cosmetics regulation in the world. Although now far more complex, current legislation still has the same core purpose as back in 1976: facilitating trade while providing the highest level of protection for consumers. Cosmetics Europe Week 2016 will mark the 40-year milestone by exploring how regulation might evolve in the future, in addition to examining how the current regulatory environment is coping with the challenges of our time.

The EU Cosmetic Products Regulation forms the backbone of the present European regulatory framework for cosmetics and personal care. In force and fully applicable since 2013, it has consolidated regulations and policies applicable to cosmetics products in the EU, and clarified all requirements. It has confirmed manufacturers' primary responsibility to guarantee safety, and cemented the role to be played by authorities in member states to survey the market and ensure proper enforcement.

Although implementation has so far been reasonably successful, there remain certain areas over which some level of caution is required, and where the ongoing role of the European Commission in ensuring smooth and harmonised application is essential.

Safety and innovation are a key success factor for our industry. The EU Cosmetics Regulation provides a suitable framework for ensuring both safety and innovation, and we trust that it will continue to do as it evolves to meet new challenges.

Gerald Renner, Director Technical Regulatory Affairs, Cosmetics Europe

“We have by far the most sophisticated cosmetics regulation in the world.”

Promoting Sustainable Business and Consumption Practices

In our fast changing world, consumers are increasingly conscious of the implications of consumption and production, and expect industry to share their concerns.

To ensure that we meet their expectations, and build and maintain their trust, our industry must implement sustainable development practices across our entire value chain. In line with the UN, we define sustainable development as meeting the needs of the present without compromising the ability of future generations to meet their own needs, based on three pillars: economic development, environmental protection and social responsibility.

In line with these pillars, our industry's sustainable development practices strive to:

- **Generate economic benefit through high value jobs and growth.** This must always be underpinned by safety and innovation.
- **Reduce our environmental footprint.** We place a strong emphasis on environmental responsibility and supporting voluntary and self-regulatory initiatives. For instance, our industry is lowering its CO2 emissions by reducing energy consumption, water consumption and waste generation throughout the product life cycle e.g. by using recycled materials for products and packaging, and taking steps to limit the amount of waste going to landfills.
- **Enhance the social value of our products and support the communities in which our products are manufactured (including value chain) or purchased.** Our industry has invested heavily in programmes that enhance the communities in which participants across our value chain operate. Numerous specific initiatives are underway within areas including health education, fair trade, health research and provision of education opportunities.

The role of Cosmetics Europe: specific initiatives

Cosmetics Europe's role in furthering sustainability practices involves implementation of specific initiatives. Below, we outline two specific initiatives that were underway in 2015 and will continue in 2016 in the field of sustainability.

The environmental footprint of shampoo

The European Commission is since 2013 conducting a pilot on Product Environmental Footprint (PEF) in several sectors which will provide lessons to guide future policy proposals. Specifically, it will feed into the Commission's Single Market for Green Products strategy.

In 2015, Cosmetics Europe continued its work on PEF Category Rules for shampoo, a project "shadowing" the Commission pilot. The first draft was submitted to an industry-wide consultation mid-year, and external stakeholders were consulted on the second draft at the end of the year. We aim to finalise the project in 2016.

The final output will include a communication component intended to raise public awareness of the environmental footprint of shampoo, outlining ways in which companies and consumers can reduce this footprint. We hope that this initiative will represent a valuable first step towards encouraging more widespread sustainable consumption by consumers.

Cosmetics Europe has developed Best Practice guidelines for complying with the due diligence requirement in the EU legislation pertaining to access genetic resources, and the equitable sharing of benefits derived from their use. In order to ensure that the Best Practice document is as comprehensive as possible, we engaged stakeholders from across the cosmetics value chain. Specifically, three European associations representing cosmetic ingredient suppliers (EffCI, IFRA and UNITIS) contributed. The Best Practice document was submitted jointly by the four associations to the European Commission, for official recognition. The outcome of the submission will be known in 2016. If recognised by the Commission, who will also consult the Member States, the Best Practice guidelines will facilitate the implementation of the EU Regulation, both by companies (in terms of compliance) and by control authorities (in terms of enforcement).

As an industry, we should be proud of the sustainable practices we have so far instituted, and excited about future opportunities. Within many key drivers for sustainability, like resource efficiency, responsible sourcing, innovation and transparency along the entire value chain, we are looking forward to many more initiatives that will benefit our industry, our consumers, the environment and the communities in which we live and work.

Advocating a Consistent Self-regulatory Approach to Advertising across the Industry

The current regulatory landscape for advertising of cosmetics and personal care products combines horizontal and specific legislation with self-regulation. In a fast-changing, globalised world, self-regulation is a vital component of the system, given that advertising is increasingly borderless.

Due to nuances in culture, language and societal trends between markets, as well as the rapid pace of scientific progress, a purely legislative approach would make it virtually impossible to monitor and implement a system of checks and balances that protects consumers from misleading or offensive advertising, while meanwhile giving industry the flexibility to produce effective advertising.

While self-regulation has obvious benefits it also represents a major responsibility. In order to provide guidance to our members, Cosmetics Europe published the Charter and Guiding Principles on responsible advertising and marketing communication in 2012. It lays out our industry's commitment to high standards for advertising in the EU, addressing consumer concerns about potential negative impacts of cosmetics advertising and providing specific recommendations around themes like airbrushing, advertising to children, and respect for the individual.

In developing the Charter at the time, we adopted the accepted best practice model for effective advertising self-regulation defined by the European Commission, and consulted a broad range of stakeholders, including the European institutions, self-regulatory advertising standards bodies, advertising representative bodies, and Non-Governmental Organisations, in order to ensure the material was wide-ranging enough to cover all requirements.

2015 represented an important milestone in the lifespan of the Charter and Guiding Principles. Implementation by the European national associations was confirmed, as was its inclusion in many national codes across the EU.

Moreover, Cosmetics Europe commissioned the first independent audit of industry compliance, with the assistance of the European Advertising Standards Alliance (EASA), an independent association that represents national self-regulatory organisations. The audit was the largest ever of its type completed by the European Advertising Standards Alliance, and was conducted across six representative European countries: France, Hungary, Italy, Poland, Sweden and UK.

The ultimate purpose of the exercise was to demonstrate that the current regulatory framework is robust and can be complemented by effective industry self-regulation, as outlined in our Charter and Guiding Principles. Indeed, the exercise represented an optimal opportunity for our industry to demonstrate that self-regulation can actually be the main tool in the policy armoury, and of course that our industry is committed to responsible advertising.

Upon completion, the results showed a 91% overall compliance with relevant advertising codes. A total of 1,861 advertisements were reviewed, including 577 television and 1,284 print advertisements aired or published over three single month periods: September 2014, March and June 2015.

The results clearly demonstrate that the system is effective. Nonetheless, there remains some room for improvement, and we are committed to further progress. 2016 will see Cosmetics Europe pursue further promotion of the current regulatory and self-regulatory framework in order to improve understanding and facilitate its implementation. Moreover, we will work in partnership with other relevant stakeholders, especially through European Commission led multi-stakeholder groups, and reinforce co-operation with the EASA and national self-regulatory organisations.

Emma Trogen, Director Legal Affairs, Cosmetics Europe



“In 2015, Cosmetics Europe commissioned the first independent audit of industry compliance, with the assistance of the European Advertising Standards Alliance (EASA). 91% of the advertisements were in compliance with all relevant national advertising codes/laws.”

Meeting Consumer Expectations in a Digitalised World

Digitalisation is a hallmark of our changing world. In the cosmetics and personal care sector, it has opened a whole new world of distribution and communication possibilities that companies ignore at their peril, as consumers demand the ability to purchase our products and to access information about them through digital means.

While technology is changing, so are people. Though the world is more interconnected, paradoxically it is also more local. Amidst growing diversification, complexity and uncertainty, consumers are seeking products that are personal to them. In parallel, given our ever-faster pace of life, consumers are increasingly seeking products that are highly functional.

In order to adapt to these transformations, the cosmetics and personal care industry will need a more multi-layered approach to key functions like communications, operations, product development and distribution. In each case, digital will play a major role.

Regarding regulation, our key goal is twofold: to harness opportunities to satisfy consumer demands while complying with existing rules that guarantee their protection; and to ensure that future regulation creates a level playing field in an omnichannel environment. Of utmost importance are also new challenges around data protection and privacy, and the inevitable surge we will face in counterfeiting.

Given that the European Commission has made the realisation of a digital single market one of its core objectives, these issues are receiving increasing attention, and we should expect the Commission to take further measures in the near future to improve access to goods and services on-line. Two areas of particular importance to our industry in 2015, which will continue to be prevalent in 2016, were geo-blocking and distribution models.

Geo-blocking: promoting a flexible approach

Geo-blocking is the practice of treating online customers differently depending on their residence or nationality, in terms of price and other conditions. It usually involves a technical measure that limits access to a certain service, or re-direction to an alternative online location. Although geo-blocking appears to represent a case of protectionism that contradicts the principles of the single market, there are nuances to consider: not all geo-blocking is unjustified.

Specifically, there are areas, such as labelling and cosmetovigilance, where the industry needs to ensure compliance with legal and regulatory commitments essential to consumer safety and confidence and which may justify a differentiation in terms of distribution, between countries.

Given these nuances, our recommendation is that geo-blocking be addressed on a case-by-case basis, based on the existing single market framework. This point was stressed in Cosmetics Europe's submission in response to the public consultation on geo-blocking in December 2015. In 2016, we will continue to closely follow legislative developments relating to geo-blocking and other barriers in the digital single market.

Selective Distribution: preserving offline principles in the online realm

Digital provides opportunities to target a wider community of consumers via new distribution channels and we must embrace them if we are to remain relevant. However companies should remain free to choose the way they distribute their products to ensure profitability and consumer satisfaction in the offline and online markets. We must ensure that key principles of selective distribution are not compromised due to digitalisation. For instance, companies that operate a selective distribution system should be allowed to ensure consistency between their offline and online product offering and may reserve the online sale of their product for their authorised brick and mortar dealers. Moreover, platforms have to fulfil the qualitative criteria set by the retailers (such as online consumer care service, certain visual style guidelines, compliance with IPR).

In 2016, we will continue to work hard to support our industry in adopting and benefiting from new distribution channels, while ensuring that the principles of selective distribution are upheld.

Emma Trogen, Director Legal Affairs, Cosmetics Europe



Advancing Research into Alternatives to Animal Testing

For over 20 years, the cosmetics and personal care industry's best scientists have been at the forefront of the development and validation of alternative test methods and approaches. With the implementation of the EU Cosmetics Regulation and the full EU marketing ban on products with ingredients tested on animals in place since 2013, the pressure is on to build on this legacy given that we must rely completely on alternative safety testing for the introduction of new ingredients.

2015 was an eventful year for Cosmetics Europe in the field of Alternatives to Animal Testing (AAT). It saw the passing of the baton from the AAT extended research programme (2012-2015) to the new Long Range Strategy Science (LRSS) Programme for 2016-2020. It also marked the completion of the ambitious SEURAT-1 programme and the start of the Horizon 2020 EU-ToxRisk initiative.

A major achievement of the AAT extended programme was the adoption of an alternative method (using Reconstructed Human Cornea-like Epithelium (RhCE)) for Identifying Chemicals Not Requiring Classification and Labelling for Eye Irritation or Serious Eye Damage. This project was a joint effort by Cosmetics Europe and the European Union Reference Laboratory for Alternatives to Animal Testing (EURL-ECVAM) and resulted in a test guideline which is now available on the OECD website.

Completing SEURAT-1: building blocks for future advances

With a total budget of €50 million - €25 million provided by the EU's 7th Framework Programme (FP7) and €25 million by Cosmetics Europe - SEURAT-1 is the single largest public-private initiative ever conducted in the field of AAT, bringing together over 70 universities, research institutes and companies. The composition of SEURAT-1 was unique for a project of this kind, comprising toxicologists, biologists from different disciplines, pharmacists, chemists and bioinformaticians.

The goal of the five-year programme, which was completed in December 2015, was to develop a consistent research strategy ready for implementation in subsequent research programmes, including innovative scientific tools for a better understanding of repeated dose toxicity, and identifying gaps in knowledge to be filled through future research work.

The applicability of the developed tools and methods was exhibited at the final SEURAT-1 symposium on 4 December 2015 in Brussels, at which a guided tour entitled "Is this Ingredient Safe? A Guided Educational Tour" showcased the tools available to support regulatory safety decision-making. The tour is available for download in booklet form on the Cosmetics Europe website, providing non-experts a virtual case-study on non-animal testing tools and methods, and how these combine to determine whether a new compound (e.g. a new ingredient in a shampoo) used in a defined exposure context is safe for consumers.

Further information, including background, vision and strategy, and specific cluster projects can be viewed on the SEURAT-1 website at www.seurat-1.eu

LRSS and EU-ToxRisk: pursuing concrete solutions and regulatory acceptance

Despite the success of SEURAT-1, this research represents a starting point rather than a destination. Our industry remains committed to playing a key strategic role in the continuation of research into AAT, and further enhancing our collaboration with the European Commission and other partners under the EU's Horizon 2020 research programme.

The Long Range Strategy (LRSS) Research Programme (2016-2020) represents one major new programme for Cosmetics Europe in this area. The industry's role will be to assist in continued R&D efforts, as well as developing concrete solutions for safety assessment and reaching regulatory acceptance.

A further initiative, entitled EU-ToxRisk, will also build on testing strategies and knowledge developed in previous national and European projects, including SEURAT-1. The €30 million Horizon 2020 supported project will see Cosmetics Europe, other industry representatives, academia, SMEs, contract research organisations (CROs) and regulatory bodies join forces.

Both LRSS and EU-ToxRisk will seek to develop new concepts for regulatory chemical safety assessment with a focus on systemic toxicity. These involve cutting-edge human-relevant *in vitro* non-animal methods and *in silico* computational technologies to translate molecular mechanistic understanding of toxicity into safety testing strategies. The ultimate goal is to deliver alternative approaches that are accepted by regular for risk assessment of substances chemicals.

Rob Taalman, Director Research Project Management, Cosmetics Europe

Building Partnerships and Relationships of Trust

Various dynamics of our fast changing world are transforming the way people and businesses produce, consume and communicate. At the forefront lie globalisation, individualisation and digitalisation. In different ways, each of these forces drives consumer empowerment, preference and expectation, creating pressures that catalyse industries such as ours to continuously adapt, from product innovation right through to consumer dialogue.

Simultaneously, we must play our part to optimise resource efficiency along our entire value chain and in the communities in which we operate.

Ultimately, this is about improving the quality of people's lives.

No one ever said it was straightforward. There are several key success factors for prospering in this changing world, and for ensuring that we retain our position as one of the most successful European industries on the global stage.

First and foremost, we must constantly challenge ourselves to advance innovation and creativity, the hallmarks of our industry. Second, our industry is highly regulated, and the policy and regulatory environment must also adapt to ensure that Europe is a place where we can innovate, produce and distribute to meet consumer needs and expectations, and enable a flourishing industry in Europe and beyond.

Our vision is that by 2025 the policy and regulatory frameworks in which we operate are future-proof. This means that we must ensure all consumers must have access to safe, innovative products and information about them that drives educated decision-making; that business must have the freedom and the ability to innovate thanks to a favourable regulatory environment, encouragement to invest, and provision of fair competition; and that policy and regulation must be underpinned by the best available evidence founded on science, fact and data.

We recognise that this not something we can achieve alone. Building trusted long-term relationships and partnerships with people and organisations across our entire stakeholder spectrum is a must.

When forming partnerships, we strive to create mutually supportive relationships with the express view of working together with other stakeholders. The starting point is dialogue which enables mutual understanding of partners' needs and views. Dialogue is an essential part of how we engage with the outside world.

In 2015 we evolved our dialogue with stakeholders across many topics that touch our sector and consumers. But our work is far from finished. We will deepen and broaden our dialogue to develop partnerships for change to enable policy and regulatory solutions for our industry to adapt and flourish in a changing world. We welcome you to join us in this dialogue.

If you want to know more about our Partnership for Change - please see our paper called Partnership for Change at www.cosmeticseurope.eu.

**Diane Watson, Director Public Affairs and Government Relations,
Cosmetics Europe**



**PARTNERSHIP
FOR CHANGE**

Our Team

We take pride in our team

We personally care

GENERAL MANAGEMENT

Loïc Armand
President



TECHNICAL REGULATORY AFFAIRS

Gerald Renner
Director



Manuela Coroama
Senior Manager



Elsa Dietrich
International Relations Manager



Florian Schellauf
Issue Manager



Orla Fenlon
Assistant

RESEARCH PROJECT MANAGEMENT

Rob Taalman
Director



Martina Klaric
Research Project Manager



Karolina Bruzska
Science Issue Manager



Filipe Almeida
Research Project Manager



Bertrand Desprez
Research Project Manager



Sabrina Dourte
Research Project Assistant



Irene Manou
Issue Manager
(seconded to EPAA)

LEGAL AFFAIRS

Emma Trogen
Director



Emilie Rinchard
Issue Manager



Hind Benrhanem
Assistant



Cosmetics Europe
the personal care association

John Chave
Director-General



Hind Benrhanem
Assistant



COMMUNICATIONS

Catherine Van Vaerenbergh
Senior Manager



Corina Pirva
Manager



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GOVERNMENT RELATIONS**

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Director



Paul Girard
Manager



RESOURCES & SERVICES

Samia Essouayah
HR & Services Manager



Daniel Leus
Financial Manager



Patricia Slack
Receptionist



Betina Simonsen
IT Project Manager



Corentin Bondroit
IT Support



Our Members and Expert Committees

For more than 50 years we have been an established European association representing over 4,500 member companies and associations with different sizes in the cosmetics and personal care industry.

Our experts have been a trusted partner to policy makers on regulatory and scientific matters. We are committed to working collaboratively with all stakeholders to shape a successful future for our members.

Our Mission

To shape a European operating environment conducive to long term growth and a sustainable future

Our Vision

A flourishing European cosmetics and personal care industry

Our Members

ACTIVE CORPORATE MEMBERS (ACM)

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

SUPPORTING CORPORATE MEMBERS (SCM)

Avon Cosmetics
Boots
Oriflame Cosmetics
Revlon
Sisley

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 matériels 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: PSVAK - The Hellenic Cosmetic Toiletry and Perfumery Association
Hungary: KOZMOS - Association of Hungarian Cosmetics, Detergents and Cleanser Industries
Ireland: ICDA - Irish Cosmetics Detergent & Allied Products Association
Italy: Cosmetics Italia - Associazione Nazionale Imprese Cosmetiche
Latvia: LAKIFA - The Association of Latvian Chemical and Pharmaceutical Industry
Lithuania: LIKOHEMA - Lithuanian Cosmetics and Household Chemicals Producers Association
The Netherlands: NCV - Nederlandse Cosmetica Vereniging
Norway: KLF - Kosmetikkleverandørenes forening
Poland: PACDI - Polish Association of Cosmetic & Detergent Industry
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 Detergent Producers of Slovenia
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

CORRESPONDENT MEMBERS (CM)

Burberry
CTFA - The Cosmetic, Toiletry and Fragrance Association of South Africa
Combe Inc.
EDANA - The international Association Serving the Nonwovens and Related Industries
Sanofi

SUPPORTING ASSOCIATION MEMBERS (SAM)

Russia: PCAR - Perfumery and Cosmetics Association of Russia
Russia: APCoHM - Association of Perfumery, Cosmetics & Household Chemistry Manufacturers
Serbia: KOZMODET - Association of Detergents and Cosmetics Producers and Importers of Serbia
Turkey: KTSD - Cosmetics & Cleaning Products Industry Association

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BOARD OF DIRECTORS

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Mr José Ginestar - Sisley
Dr Amanda Long - Avon Cosmetics
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Ms Karen Mann – Burberry
Mr Anthony Santini – Combe Inc.
Ms Adelia Pimentel – CTFA

Our Strategic Core Teams (SCT)

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Vice Chair: Mr Harald Schlatter - Procter & Gamble

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Mr Raniero De Stasio - Estée Lauder
Dr Rolf Fautz - Kanebo (Kao Group)
Dr Pierre-Jacques Ferret - Pierre Fabre
Dr Chris Flower - CTPA
Ms Melinda Friend - Colgate-Palmolive
Mr François Gomez - Chanel SAS
Ms Lauren Hutchison - Colgate-Palmolive
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Ms Fabienne Roeykens - L'Oréal
Mrs Cynthia Sanfilippo - L'Oréal
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Mr Peter-Boris Schmitt - Henkel
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Mr Hynek Sery - Procter & Gamble
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Mr David Van Passel - Johnson & Johnson
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Ms Aude Crucy - Coty
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Dr Stefano Dorato - Cosmetics Italia
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Ms Marianne Schwarberg - BCG Baden-Baden Cosmetics Group GmbH

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Ms Yuri Endo-Malamant - Shiseido
Ms Carmen Esteban - STANPA
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Mr David Van Passel - Johnson & Johnson
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Mr Pablo Berbel-Fernandez - Johnson & Johnson
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Ms Corinne Coscas - LVMH
Ms Hélène Daniel - LVMH
Ms Oualida Draa - Kanebo (Kao Group)
Ms Nathalie Dreyfuss - Colgate-Palmolive
Mrs Anne Dufermont - Chanel SAS
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Ms Ana Gaspar - Colgate-Palmolive
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Dr Sven Gohla - Beiersdorf
Ms Emmanuelle Gourbin - FEBEA
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Ms Julie Laverriere - L'Oréal
Mr Heiko Maile - Kanebo (Kao Group)
Mr Darshit Patel - Unilever
Mr Gian-Andrea Positano - Cosmetica Italia

SCT RESPONSIBLE ADVERTISING & CLAIMS

Chair: Dr Chris Flower - CTPA

Members

Mr James Barnes - Unilever
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Mr Steffi Bogart - Estée Lauder
Mr Harald Büttner - Beiersdorf
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Ms Tiphaine Daubert Macia - Chanel SAS
Ms Nilgün Dayioglugil - Avon Cosmetics
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Mr Matthias Ibel - IKW
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Mr Frédérick Warzée - DETIC
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Vice Chair: Mr Jean-Florent Campion - L'Oréal

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Ms Francis Dekker - Unilever
Ms Nathalie Delangle - FEBEA
Ms Virginie D'Enfert - FEBEA
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Ms Judith Kaumanns - Procter & Gamble
Mr Michael Krugman - Estée Lauder
Mr Hirofumi Kuwahara - Kanebo (Kao Group)
Mr Gustavo Maranes - Johnson & Johnson
Mr Nick Mitrevski - Colgate-Palmolive
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Ms Betina Simonsen - Cosmetics Europe
Mr François Stickel - Chanel SAS
Mr Alessandro Tempra - Johnson & Johnson
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Mr Frédérick Warzée - DETIC
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Mr Chuchu Yu - NCV

SCT TRUST & REPUTATION

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Vice Chair: Dr Chris Flower - CTPA

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Mrs Anne Dufermont - Chanel SAS
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Mr Antoine Housset - Chanel SAS
Ms Birgit Huber - IKW
Ms Thea Koning - Unilever
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Ms Isabelle Martin - Estée Lauder
Mr Pierre-André Poirier - Pierre Fabre
Mr Christiaan Prins - Unilever
Mr Rene Rust - GlaxoSmithKline
Mrs Cynthia Sanfilippo - L'Oréal
Ms Marjolein Van Oostrum - NCV
Ms Malgorzata Wadzinska - Procter & Gamble

Our Expert Teams (ET)

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Ms Francis Dekker - Unilever
Mr Raniero De Stasio - Estée Lauder
Mr Stuart Elliott - GlaxoSmithKline
Ms Ana Gaspar - Colgate-Palmolive
Mr Matthias Ibel - IKW
Ms Magali Parisot - L'Oréal
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Ms Estelle Vallette - Colgate-Palmolive
Mr David Van Passel - Johnson & Johnson
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Vice Chair: Mr Graham Wilson - Procter & Gamble

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Ms Raffaella Berioli - FEBEA
Ms Cathrine Berliner Boteju - SPT
Ms Erika Bonnegrace - CTPA
Ms Yu-Ting Chen - DETIC
Ms Maggie Collier - GlaxoSmithKline
Ms Ana-Maria Couras - AIC
Ms Francis Dekker - Unilever
Ms Isabelle Dermigny - Chanel SAS
Dr Stefano Dorato - Cosmetics Italia
Ms Michèle Elbaz - Chanel SAS
Ms Carmen Esteban - STANPA
Ms Laura Garcia-Deacon - Avon Cosmetics
Mr John Gusmano - Estée Lauder
Ms Barbara Hery - LVMH

Ms Birgit Huber - IKW
Ms Amanda Isom - CTPA
Ms Lonneke Jongmans - NCV
Dr Magali Jousselin - Johnson & Johnson
Dr Michael Meyberg - Beiersdorf
Ms Isabelle Orquevaux-Hary - L'Oréal
Dr Artur Puig - Revlon
Dr Sandra Rechsteiner - Colgate-Palmolive
Mr Gurpreet Rehal - SPT
Ms Ewa Starzyk - PUCI
Ms Sara Tormo - Colgate-Palmolive
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Mr Hirofumi Kuwahara - Kanebo (Kao Group)
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Dr Klaus Rettinger - IKW

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Mr Werner Schuh - Henkel
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Mr Angus Swinscoe - Boots
Dr Daniella Urbach-Ross - Colgate-Palmolive
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Mr Nicolas Wolf - LVMH
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Mr Chuchu Yu - NCV

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Ms Ana Gaspar - Colgate-Palmolive
Mrs Céline Godard - L'Oréal
Mr Todd Gouin - Unilever
Dr Jalila Hibatallah - Chanel SAS
Mr Peter Jansson - KTF
Dr Marie Johansson - Colgate-Palmolive
Dr Hans-Joachim Kätker - Coty
Ms Judith Kaumanns - Procter & Gamble
Ms Thea Koning - Unilever
Mr Michael Krugman - Estée Lauder
Ms Beth Lange - PCPC
Ms Barbara Leroy - Johnson & Johnson
Dr Amanda Long - Avon Cosmetics
Dr Michael Meyberg - Beiersdorf
Dr Beta Montemayor CCTFA
Dr Klaus Rettinger - IKW

Mrs Cynthia Sanfilippo - L'Oréal
Mr Uta Schubbert - Colgate-Palmolive
Ms Lisa Sligting - NCV
Dr Stephan Teichmann - WIN COSMETIC GMBH & CO KG
Mr Richard Von-Stein - Avon Cosmetics
Mr Thorsten Wind - Henkel

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Ms Nicole Brun - Coty
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Ms Agathe Cury - FEBEA
Ms Tiphaine Daubert Macia - Chanel SAS
Ms Francis Dekker - Unilever
Ms Virginie D'Enfert - FEBEA
Ms Cécile Dupy - Pierre Fabre
Ms Carmen Esteban - STANPA
Dr Joanna Fitch - GlaxoSmithKline
Ms Elisabeth Fournier-Qezari - L'Oréal
Dr Roberto Gorni - Cosmetics Italia
Ms Khusbu Jain - Avon Cosmetics
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Ms Isabelle Martin - Estée Lauder
Dr Philippe Merkin - Chanel SAS
Dr Alexandra Muth - Kanebo (Kao Group)
Ms Olivia Santoni - CTPA
Mr Werner Schuh - Henkel
Ms Marine Sire - Pierre Fabre
Dr Angela Stadler - Procter & Gamble
Ms Estelle Vallette - Colgate-Palmolive

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Vice Chair: Dr Dominic Pratt - Kanebo (Kao Group)

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Ms Catherine Bramaud - FEBEA
Ms Francis Dekker - Unilever
Dr Eric Dufour - L'Oréal
Mr Geoffrey Hawkins - Estée Lauder
Mr Atse Korndorffer - Keune Haircosmetics Manufacturing B.V.
Dr Giancarlo Melato - Cosmetics Italia
Dr Emma Meredith - CTPA
Dr Artur Puig - Revlon
Dr Pushpa Rao - Combe Inc.
Dr Armin Wadle - Henkel

ET INGREDIENT MONITORING & ASSESSMENT

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Members

Dr Anette Abschütz - Procter & Gamble
Ms Cathrine Berliner Boteju - SPT
Ms Catherine Bramaud - FEBEA
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Ms Yu-Ting Chen - DETIC
Ms Maggie Collier - GlaxoSmithKline
Ms Oualida Draa - Kanebo (Kao Group)
Dr Anne Fuchs - Kanebo (Kao Group)
Ms Laura Garcia-Deacon - Avon Cosmetics
Ms Pilar Garcia-Hermosa - STANPA
Dr Emer Gilligan - Oriflame Cosmetics
Ms Monika Grzybowska - PUCI
Mr Volker Holle - Beiersdorf
Mrs Celine Huet - L'Oréal
Ms Lonkeke Jongmans - NCV
Ms Francine Kach - L'Oréal

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Dr Marie Kennedy - Elizabeth Arden
Ms Beata Kowalczyk - PACDI
Ms Anais Ley - Shiseido
Dr Linda Loretz - PCPC
Dr Giancarlo Melato - Cosmetics Italia
Dr Emma Meredith - CTPA
Mr Boris Michelin - Johnson & Johnson
Dr Beta Montemayor - CCTFA
Mr Garrett Moran - Oriflame Cosmetics
Dr Anna Oborska - PACDI
Dr Sandra Rechsteiner - Colgate-Palmolive
Mr Gurpreet Rehal - SPT
Dr Klaus Rettinger - IKW
Ms Ewa Starzyk - PUCI
Ms Sara Tormo - Colgate-Palmolive
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We personally care



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