

Working for a caring future
Activity Report 2014



Cosmetics Europe
the personal care association



“The industry shares a common goal: to innovate, develop and market safe products that help and enhance the daily lives of people...”

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FOREWORD

As the voice of Europe's dynamic Cosmetics and Personal Care Industry since 1962, we are pleased to reflect upon some of the highlights of 2014.

2014 marked an important step forward for our association as we embarked on a new, expanded Trust & Reputation strategy. We recognised that we can do more to enhance dialogue with stakeholders on a range of technical and societal topics – and clearly articulate our industry's value to Europe to shape a successful future for our members.

The fact is, every day millions of people enjoy the benefits and pleasures of personal care and cosmetics. From fragrances, deodorants, lipsticks, shampoos and hair colours to soaps, sunscreens, mouth rinses and toothpastes, these essentials touch people's senses, needs and imagination at all stages of life.

For more than 50 years, we have been an established European Association representing nearly 4,500 member companies and associations of different sizes in the cosmetics and personal care industry. Together, and building upon our rich heritage, our experts have been a trusted partner to policymakers on

regulatory and scientific matters. We look forward to continuing this dialogue and playing our part in contributing to European growth and innovation in the coming years.

Collaboration – both internationally and along the supply chain, has also been key to our efforts – for the industry shares a common goal, regardless of geography: to innovate, develop, and market safe products that help and enhance the daily lives of people. Strong co-operation in sharing information and experience is critical, to better serve this purpose. Through compatible regulatory structures, a “one voice” approach on ingredient management, environmental issues and cooperation in trading partnerships, we have greater strength to secure the industry's licence to operate and competitiveness in the global marketplace.

On that note, and on behalf of Cosmetics Europe, we invite you to read more about the contributions of our members and staff in our quest for a future of innovative, safe, sustainable products that are a cornerstone in personal care, self-esteem and well-being.



Loïc Armand
President



Gerd Ries
Deputy Director-General

Cosmetics Europe's Vision and Mission

Our Vision: a flourishing cosmetics industry increasingly improving people's quality of life in Europe and beyond.

Our Mission: to shape an operating environment conducive to the long-term growth of our members, helping them to decisively contribute to individual and social well-being in everyday life.

Every person deserves a sense of well-being, self-esteem and self-confidence: the significance of these needs is set to increase in our ageing, diversifying and fast-moving society. As a leading member association we will continue to support our members in meeting the growing needs and expectations of consumers and our stakeholders.



International Activities

Europe continues to be the global flagship industry of cosmetic and personal care products. The EU domestic market remains a strong base, but 'natural growth' is rather taking place in emerging markets. Cosmetics Europe's objective is a regulatory environment in core markets (EU, China, India, Russia, USA, and Japan) and regions (including Middle East, Asia, Latin America and Africa). The EU Cosmetics Regulation continues to provide a strong source of inspiration for regulatory solutions in many regions with emerging or evolving legislation. This provides a huge opportunity for the EU, but also responsibility to ensure that the EU regulation is well understood and not misinterpreted by those regions.

For instance, China's €39 billion cosmetics market remains an important motor of growth for EU cosmetics brands, both as importers and local manufacturers. China continues modernisation of legislation, with a close look at the EU model. The existing technical regulatory collaboration between the European Commission and the China Food and Drink Administration (CFDA) provides an excellent opportunity to contribute to better workable, predictable and transparent legislation. Further progress has been achieved with China's decision to give manufacturers of domestic, non-special cosmetics the choice

to opt for standard safety testing of products by state laboratories (including animal testing) or carrying out state of the art in-house safety assessments. However, significant work is still needed to achieve a smooth registration of new cosmetic ingredients, fully aligned requirements between domestic and imported products, and the acceptance of internationally accepted safety assessment methods for domestic and imported products alike. These issues will be addressed through the revision of the basic Chinese cosmetics legislation (CHMR), expected to be completed in 2016. Cosmetics Europe will continue to provide input and expertise to help solve these open questions.

International convergence, by its very definition, cannot be achieved through action of any region in isolation. The collaborative network of international cosmetic industry associations has grown and strengthened substantially. Work started in 2014 on global industry position papers on specific regulatory issues that will allow local promotion of regulatory convergence. The International Collaboration on Cosmetic Regulation (ICCR), the voluntary regulatory forum for health authorities and cosmetics industry in Canada, the EU, the US, Japan, Brazil and (as observer) China continues as a useful platform to



International Activities

continued

support specific technical/regulatory convergence discussions. However, it is clear that true international convergence needs to start from a strong political commitment, which is usually not mainly driven by regulatory considerations. Trade commitments and instruments such as the World Trade Organisation Technical Barriers to Trade procedures and Free Trade Agreements are of great importance in this context.

For instance, the Transatlantic Trade and Investment Partnership (TTIP) could provide the unique opportunity of the decade to resolve long-standing regulatory divergences between the EU and the US that currently create unnecessary barriers to innovation and trade to the €3 billion transatlantic cosmetics business. The main obstacles are of non-tariff, regulatory nature and result from a fundamentally different approach which treats a large number of product types, that are considered as cosmetics in the EU, as Over the Counter Drugs (OTC) in the US. This implies that products that are recognised as safe

and compliant cosmetics in the EU need to undergo long and costly drugtype testing, registration and labelling, which can be prohibitive, in particular for SMEs.

Addressing this difference will require ambitious proposals regarding regulatory alignment or mutual recognition of regulatory provisions. These proposal must be backed by a strong political mandate for the EU and US cosmetics regulators to allow them to negotiate agreements in TTIP that would require regulatory changes on either side to implement. The cosmetics chapter is in this respect, not different from other industry chapters under discussion in TTIP. Besides this major issue, certain other areas exist, where TTIP can provide a reduction of quasi regulatory barriers and the prevention of future barriers.

2015 will be a crucial year to determine the level of ambition the EU and US will bring into TTIP – and thus its impact on the transatlantic trade for our industry.

Contact: Gerald Renner



Technical Regulatory Affairs

Regulation (EC) 1223/2009 on Cosmetics Products

With Regulation (EC) 1223/2009 on Cosmetics Products (the Cosmetics Regulation) having become fully applicable in July 2013, some might have expected a quiet 'regulatory year'. Whilst it is true that the implementation had been well prepared across all stakeholders and no significant changes of the brand new law were proposed in 2014, the daily management of the Cosmetics Regulation, which is after all our industry's main licence to operate, still constituted an important part of the work of the Technical Regulatory Department.

Some 'loose ends' still needed to be tied up, such as uncertainty on the regulatory status of some nanomaterials, harmonised understanding of roles and responsibilities along the supply chain and practical guidance on the impact of packaging in the cosmetic product safety assessment.

With the support of the network of national members associations, Cosmetics Europe detected and managed instances of a lack of harmonisation in practical application of the Cosmetics Regulation at member state level, e.g. with regard to the notification of Serious Undesirable Effects, control practice for imported products, or requirements for manufacturing premises.

Furthermore, the Cosmetics Regulation text contains a number of regulatory meeting dates, ranging from 2014 to 2018, such as the annual update of the Cosmetics Products Notification Portal (CPNP) database, the annual Commission catalogue on nanomaterials used in cosmetics, review of the Regulation with regard to managing Endocrine Disruptors (2015), Commission

report to the EU Parliament on the effectiveness of the common criteria for claims (2016), review of the regulatory approach regarding nanomaterials (2018). Some of these review dates have the potential to trigger a debate about wider ranging regulatory changes. Industry needs to be ready with clear positions when this happens.

Like the old Cosmetics Directive, the Cosmetics Regulation is not static but a living document that will continue to evolve to respond to scientific and policy developments around it.

Ingredient Safety

After the busy and resource-heavy period of implementation of the Cosmetics Regulation, the European Commission's focus in 2014 moved back to the risk management of ingredients. Ingredient defence activities and support to ingredient consortia thus remained an important aspect of Cosmetic Europe's services to its members.

Cosmetics Europe fully supports the principle of science based regulation for cosmetics. The Cosmetics Regulation is largely a risk based regulation (regulation based on safety assessments, not on hazard classification) and it is fundamental to maintain this approach for the management of ingredients. Cosmetics Europe continued to advocate towards the EU Commission and its scientific advisory body, the Scientific Committee on Cosmetic Safety (SCCS), that processes and standards for safety assessment be transparent, predictable and based on state of the art methodologies.



Technical Regulatory Affairs

continued

In 2014, the EU Commission finalised the regulatory discussions and introduced regulation on a number of key ingredients, including parabens, alkyl (C16, C18, C22) trimethylammonium chloride, citric acid and silver citrate, chloromethylisothiazolinone/methylisothiazolinone (CMIT/MIT), triclosan and tris-biphenyl triazine (nano). Discussions progressed on several other ingredients such as nano UV filters, nano Carbon Black, 3-benzilydene camphor, dichloromethane, climbazole, potassium hydroxide (KOH), quaternium-15, boric acid and borates (incl. perborates), to name just a few. Importantly, this work also included a proposal to ban the use of the preservative MIT in leave-on cosmetics, following in substance the recommendation which Cosmetics Europe had made in 2103 in response to a reported increase in adverse skin reactions.

A relatively large number of the ingredients under discussion belong to the class of preservatives. Access to safe and efficient preservatives for cosmetics is limited, and the choice is becoming continuously smaller due to regulatory constraints. In 2014, Cosmetics Europe started collaboration with key stakeholders on a strategy to reverse this trend. This will be one of the key priorities for 2015 and beyond.

The EU Commission carried out a public consultation regarding wider consumer communication on **fragrance allergens**. Cosmetics Europe continued its dialogue with the supplier industry and the European Commission on effective risk management and consumer information. The contributions to the public consultation were still under assessment at the end of 2014 and a report and regulatory proposal is expected during 2015.

Related Regulations

Although it provides a strong, sector-specific framework, the Cosmetics Regulation is not a separate island but 'embedded' in a landscape of EU policies and legislation which may impact the cosmetic industry's licence to operate. Expectations are high that the new European Commission and European Parliament will put a strong emphasis on 'better regulation', i.e. preparing regulatory decisions in an open and transparent manner, using the best available evidence, and achieving regulatory objectives with a minimum cost for industry, based on clear impact assessments. Cosmetics Europe will make it a priority for 2015 to ensure implementation of these principles in all aspects of the application and adaptation of any regulation affecting the cosmetics industry's licence to operate, such as the examples below.

In 2014, the EU Commission progressed important legislative initiatives on the revision of the **General Product Safety Directive**, a proposal for a comprehensive **Market Surveillance Regulation** as well as a recast of the **Medical Device Directive**. All three proposals contained relevant provisions which could possibly overlap with the scope and practical application of the Cosmetics Regulation. To avoid duplicate or contradictory requirements for the cosmetics industry, Cosmetics Europe advocated a clear exclusion of cosmetics from any requirements that are already implemented in our sector legislation. The adoption process of these legislations slowed down in the second half of the year due to the European Parliament elections and formation of the new EU Commission. Adoption is now envisaged for 2015.



Technical Regulatory Affairs

continued

EU tax authorities are working on harmonisation regarding alcohol denaturant systems for cosmetics. Initial proposals could severely restrict cosmetics industry formulation options and increase costs for the industry. The benefit of this recommendation for combating tax fraud and illegal alcohol is more questionable given the fact that only very few isolated cases of misuse have been reported.

Cosmetics Europe has also been involved in the ongoing process to review the Quantitative Risk Assessment tool (QRA) led by the Research Institute for Fragrance Materials (RIFM). The Association has taken part in different activities such as the International Dialogue for the Evaluation of Allergens (IDEA) project which aims to provide a broadly agreed and transparent framework for assessing fragrance sensitizers. Cosmetics Europe also continued its dialogue with the fragrance industry to develop a methodology for sensitizers (fragrance and non-fragrance materials) that can be accepted by the different regulatory bodies.

With regard to endocrine disruptors and endocrine active substances, Cosmetics Europe prepared its contribution to the public consultation in 2014 (submitted in early 2015) for the proposed impact assessment on criteria for plant protection products and biocides.

Improving methodology for exposure assessment has been a prominent part of the overall ingredient defence strategy. In 2014, Cosmetics Europe revived its exposure expert group which aims at providing support to questions regarding individual ingredients, as well as undertaking projects to develop tools and databases for estimating realistic exposure to cosmetic products for various consumer groups.

Contact: Gerald Renner



Science & Research

With the implementation of the Cosmetics Regulation (July 2013) and instigation of the full EU marketing ban on products with ingredients tested on animals after March 2013, the cosmetics industry is challenged to develop alternative approaches for assessing the safety of new ingredients and to maintain its ability to innovate and defend existing ingredients in Europe.

The development of replacement methods will be more complex than just one-to-one replacements and will comprise combinations of alternative/in vitro test methods to be employed through Integrated Testing Strategies (ITS).

Cosmetics Europe continues its efforts to actively engage in the development of Alternatives to Animal Testing (AAT). The focus in 2014 was on its extended AAT programme, on the establishment of a Long Range Strategy Science (LRSS) Programme for 2016-2020 and on the SEURAT programme (jointly funded by the European Commission), which will come to an end by December 2015.

The objective of the LRSS collaboration is to finance, steer and promote the successful development of AAT-based test methods and approaches for safety assessment and to facilitate their regulatory acceptance. The toxicological endpoints that will be covered include the areas of skin sensitisation, eye irritation, genotoxicity, systemic toxicity and absorption, distribution, metabolism and excretion (ADME) with the majority of resources being foreseen for the latter two fields.

The LRSS shall secure the continuation of the AAT work, which has been successfully conducted for many years by Cosmetics Europe. A new approach has been taken by Cosmetics Europe in building a self-funded Consortium, which is open to Cosmetics Europe members as well as non-members, e.g. suppliers and other parties. The Consortium also has, as one of its aims, to enter into strategic partnerships which would allow applying for public funding e.g. the EC Horizon 2020 programme.

In 2014, the 9th World Congress on Alternatives and Animal Use in the Life Sciences was held in Prague, Czech Republic, from 24 - 28 August. Cosmetics Europe played an important role at this World Congress by demonstrating its portfolio of activities and the latest results on alternative approaches for cosmetic safety assessment. A dedicated Cosmetics Europe session included updates and major achievements in the areas of eye irritation, genotoxicity/ mutagenicity, skin sensitisation, skin bioavailability and systemic toxicity, with a focus on meeting the new legal requirements following the animal testing ban. In total, Cosmetics Europe submitted 19 abstracts for oral or poster presentations.

The main achievement for 2014 in the various focus areas are highlighted in the next section:

Science & Research

continued

Eye Irritation: Following the successful completion of the EURL-ECVAM/ Cosmetics Europe Eye Irritation Validation Study (EIVS) of Reconstructed human Tissue (RhT)-based test methods, the draft EpiOcular™ EIT test guideline that already incorporates the use of HPLC/UPLC (liquid chromatography techniques used to separate the different components found in mixtures)-spectrophotometry has been submitted to Organisation for Economic Co-operation and Development (OECD) in November 2014. The expectation is that it will be presented for adoption in April 2015. The Scientific Advisory Committee opinion (ESAC) on the EIVS including the use of HPLC/UPLC-spectrophotometry will be published in 2015.

Skin Tolerance: To fill the data gaps for sensitiser potential & potency and thus to conceive an appropriate testing strategy for safety assessment, the comprehensive evaluation of available methods commenced. In its second phase, the testing was completed for 4 methods at the end of 2014 (KeratoSens, MUSST, h-CLAT, DPRA). The testing has also started in 3 other methods (Sens-IS, VITASENS, and GARD). After careful analysis of the data it was decided to proceed with further testing of Sens-IS.

In 2014, Cosmetics Europe prepared a proposal for the development of an integrated testing strategy where all available testing strategies will be evaluated using our data. In addition, the dependencies of the individual test

methods will be evaluated providing distinctive information on the added value of each method. This project started in 2014 and is scheduled to take until Q1 2016.

In the next phase (III), the testing strategies will be challenged with another set of chemicals. The experimental work will commence once a clearer picture of the testing strategy is available which is expected in the course of 2015.

The work on the human T-Cell Priming Assay” (hTCPA) aims at developing methods that utilise human naïve T-Cells to distinguish potencies of putative skin sensitisers. Project plans were adopted in 2014 to, first in 2015 further optimise the Standard Operating Protocol (SOP) in order to gain in sensitivity and specificity.

Bioavailability/Metabolism: The main study ‘Measurement of skin bioavailability and metabolism parameters of 50 compounds relevant to toxicity endpoints (genotoxins, sensitisers)’ started in Q3 2014. Its aim is to standardise and develop *in-vitro* models able to generate high quality data for cutaneous absorption and metabolism of 50 compounds, i.e. to improve the accuracy of the current method. The following parameters will be measured: chemical solubility, partition (K) and diffusion (D) coefficients, covalent protein binding kinetics, metabolic stability of compounds, metabolism in *ex vivo* skin, penetration in *ex vivo* skin. The data obtained will also be used for optimisation of *in silico* tools (through collaboration). Preliminary results will be available in 2015.

Genotoxicity: The current focus is the validation of tier 2 genotoxicity assays based on 3D skin models (3D Skin Micronucleus (MN) and 3D Skin Comet assays), which take into account the exposure route of ingredients, especially the topical application characteristic for cosmetics. The 3D Micronucleus study concluded phase 3 which means that the number of coded chemicals tested was expanded to add information on the predictive capacity of the assays. The outcome provided an excellent overall specificity in the 3D Micronucleus assay. Work is underway to optimise the protocol for chemicals requiring metabolic activation and to extend the data set with additional compounds.

The 3D Comet project completed phase 2 where coded chemicals were evaluated with respect to inter- and intra-laboratory reproducibility. Results showed good predictability for all laboratories. Phase 3 has started, in which further chemicals will be tested by 3 laboratories.

Cosmetics Europe has started a collaboration in the HET (hen egg test)-MN (micronucleus) project. The method is of interest particularly for follow-up testing of non-dermally applied substances. The prevalidation of the HET-MN was finalised in Q3 2014 in three laboratories. The analysis of 20+ chemicals

tested double-blinded showed a promising outcome of 80% accuracy. The next step will be the expansion of the chemical space and the assessment of the metabolic capacity of the developing hen's egg. It is estimated that these projects will be finished by the end of 2015/start 2016.

Systemic Toxicity: Cosmetics Europe and the European Commission are equally cofunding SEURAT-1, the largest EU initiative ever undertaken on alternative methods with seven individual cluster projects and more than 70 research partners. The aim of SEURAT-1 is to make the first decisive step towards the ultimate replacement of in vivo repeated dose systemic toxicity testing with animal-free approaches. COSMOS, SCR&Tox, DETECTIVE, HeMiBio and NoTox are the five SEURAT-1 research cluster projects covering different areas of expertise relevant to the development of alternative methods. In addition there is the central data analysis service ToxBank and the coordination action COACH.

All the SEURAT cluster projects made good progress in 2014. Volume 4 of the SEURAT book (annual report) was published and is available from the [SEURAT website](#).





Science & Research

continued

Some highlights:

- DETECTIVE further optimised exposure protocols for all 3 target organ groups (heart, liver and kidney) for long-term (up to 2 weeks) repeat dose exposures, with recovery periods to investigate the reversibility of effects of chosen toxicants. They also demonstrated the applicability of human skin-derived precursor cells (hSKPs) and their hepatic differentiated progeny (hSKP-HPCs) as a novel in vitro model for hepatotoxicity testing. <http://www.detect-iv-e.eu/>
- HeMiBio established long-term culture of different cell populations (UpCyted hepatocytes and PSC-derived hepatocytes) within the 2D flow over bioreactor and incorporated toxicity sensors. <http://www.hemibio.eu/>
- SCR&Tox established a toxicity assay for stem cell-derived neurons, which may feed into an AOP (Adverse Outcome Pathway) addressing neurotoxicity. <http://www.scrtox.eu/>
- The COSMOS DB data model was revisited and updated to host the COSMOS NOAEL and TTC databases (launch expected in 2015). <http://www.cosmostox.eu/home/welcome/>
- Tox Bank – It is now possible to retrieve relevant information from either COSMOS DB or ToxBank to promote analysis across different data domains, for example, in vivo toxicity and in vitro testing results. The integration between both systems is based on open standards allowing seamless exploration of the data available across the projects within the SEURAT-1 cluster and beyond. <http://toxbank.net/>
- NOTOX further developed techniques for the in-depth characterisation of liver tissue and hepatic spheroids using confocal microscopy and extended the model towards cholestatic compounds. <http://www.notox-sb.eu/>
- COACH organised meetings, workshops and a summer school. It also provided support for both ab-initio and read-across case studies as well strategic planning to communicate research needs beyond SEURAT-1 (leading to a publication in (leading to a publication in [Archives of Toxicology](#)).

Useful links to websites:

[SEURAT](#)

[EURLECVAM](#)

[SCCS](#)

Contact: Rob Taalman



Sustainable Development

In 2014, Cosmetics Europe focused its sustainability-related activities on two major projects.

The first one was the voluntary development of Product Environmental Footprint Category Rules (PEFCR) for shampoo, which started in January 2014 and will run until the end of 2016. The steps which were completed in 2014 are the screening study, the first draft PEFCR and the wider membership consultation. It is expected that the outcome of this project will be easily adaptable to other rinse-off cosmetic product categories.

The second project was the development of Best Practice for the Cosmetics Industry related to the newly adopted Cosmetics Regulation on compliance measures related to the access to genetic resources and the fair and equitable sharing of benefits arising from their utilisation (which implements in EU law the Nagoya Protocol on the conservation of biodiversity). Cosmetics Europe has been working on this project together with three supplier associations: EFfCI, the European Federation of Cosmetic Ingredient Suppliers, IFRA, the International Fragrance Association, and UNITIS, the European Organisation of Cosmetic Ingredients Industries and Services. This project should be completed by mid-2015.

Contact: Manuela Coroama



Communications & Public Affairs

2014 was a busy year for communications and public affairs activities which remain central to Cosmetics Europe's external relations work.

SCT Trust & Reputation was launched in close co-ordination with the Board of Directors. The scope of the SCT is to develop Cosmetics Europe's reputation building strategy through enhanced dialogue with stakeholders on a range of technical and societal topics, and a clearer articulation of the industry's value to Europe.

The SCT is working together with brand experts and members on a long-term all encompassing communication and public affairs strategy and accompanying set of tools to be implemented at European and national levels.

In addition to ongoing media relations activities, we published the Annual Report and organised the June Open Forum with the consumer-focused theme, 'Consumers at the Heart'. We also produced two videos around the Scientific Conference and General Assembly and a new stakeholder outreach brochure, 'Taking care of people, together.'

We were particularly proud of the launch of the new Extranet for Members in 2014 in our continuous efforts to improve internal communications tools

and would like to thank all of the members who provided their input over the course of the 16-month long project. A number of training courses have been organised with members since to ensure everyone understands how to use the tool and to optimise performance.

We met regularly with our external stakeholders in the European Commission, European Parliament, Permanent Representations in Brussels and NGOs to strengthen dialogue on areas of mutual interest.

This, in addition to comprehensive monitoring and intelligence – which we provide to members on a wide variety of relevant issues stemming from the media and politically: from product safety and ingredient safety and environmental issues to the review of the EU chemicals legislation.

More than ever before, it is critical in a world of digital, instantaneous media, that we work in close collaboration with our member companies and national associations in Europe and across the globe. Harnessing synergies and sharing best practice will be key to communicating effectively on key issues affecting our sector – such as ingredient safety, alternatives to animal testing, responsible advertising and sustainability issues.

Contact: Catherine Van Vaerenbergh



Legal Affairs

The Legal Affairs department has been instrumental in assisting and supporting the activities of Cosmetics Europe by providing ongoing support to all the departments and strategic core teams on the interpretation and implementation of the legislative framework for cosmetics. The department also provides continued support to management on statutory questions and provides assistance to the Cosmetics Europe staff with respect to the shaping and management of consortia. In addition to this, the department performs regular antitrust assessments and offers advice and training internally to ensure full compliance with all applicable competition law requirements.

The team also has full responsibility for two strategic core teams. In partnership with the Strategic Core team for Selective Distribution Channels, our legal affairs department continues to actively monitor the application of the rules relating to selective distribution under the EU Commission's vertical block exemption regulation. Together with the Strategic Core Team Self-Regulation on Advertising, the department follows-up on the implementation of the CE Charter and Guiding Principles on responsible advertising and marketing communication.

Contact: Emma Trogen



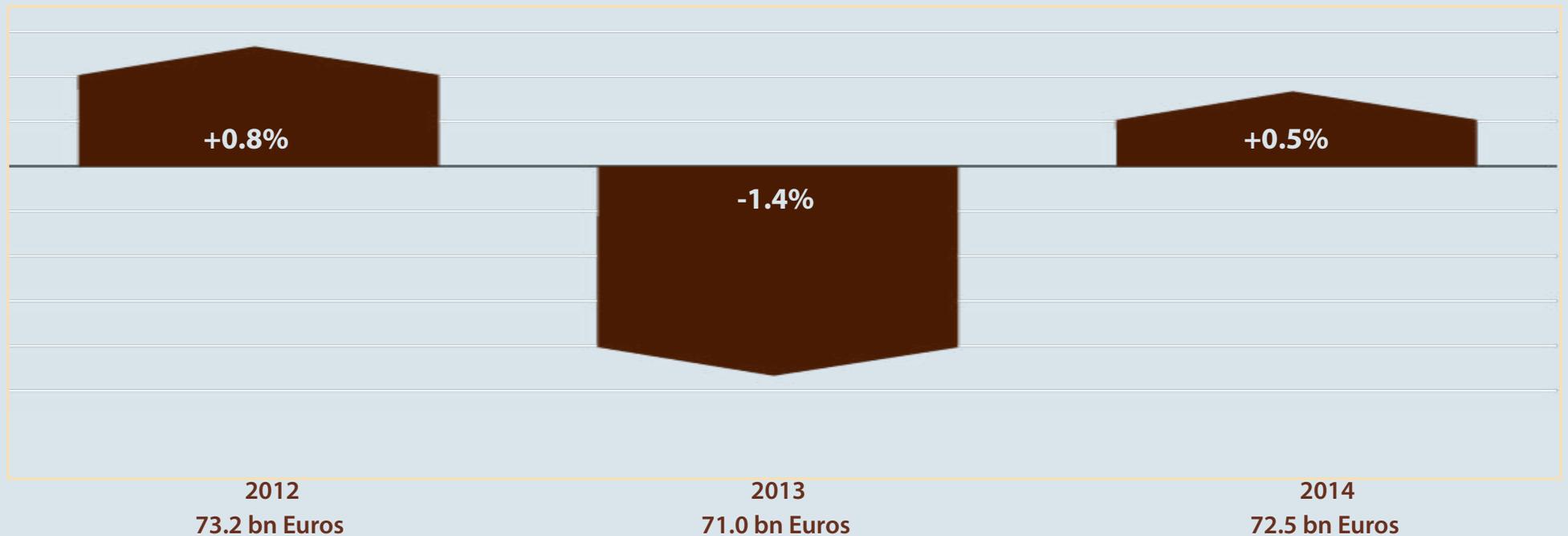


“The European Cosmetics and Personal Care Market remains resilient with signs of recovery..”

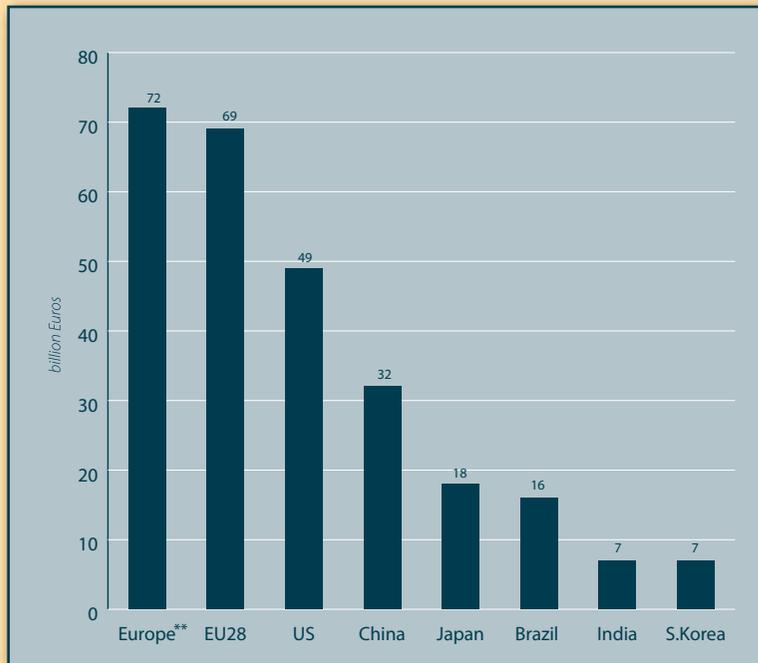
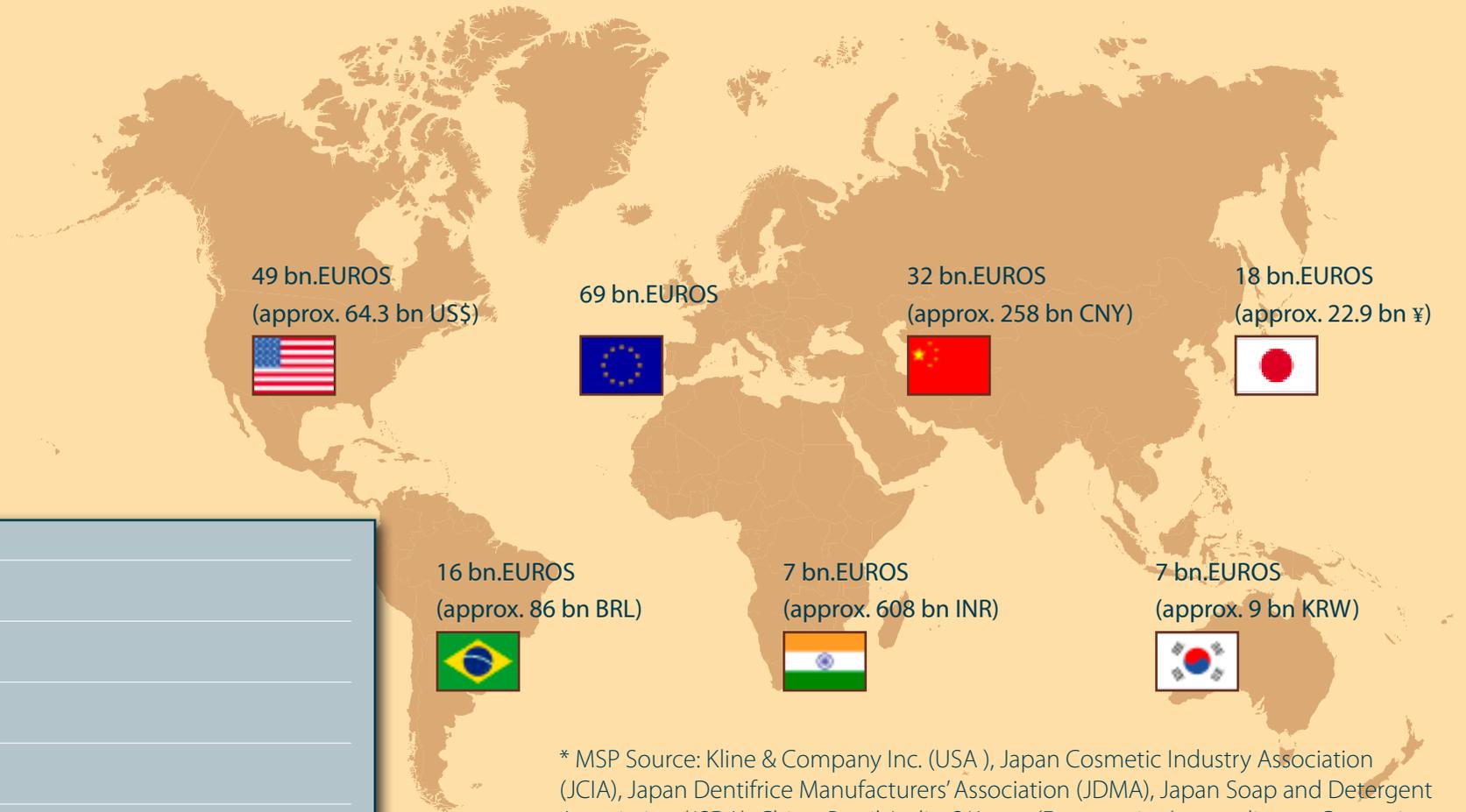
The European Cosmetics Market 2014

EUROPEAN COSMETICS & PERSONAL CARE MARKET: ANNUAL GROWTH 2012-2014

Retail Sales Price (RSP) in bn Euros and % growth



European Industry Market Share vs Global Market

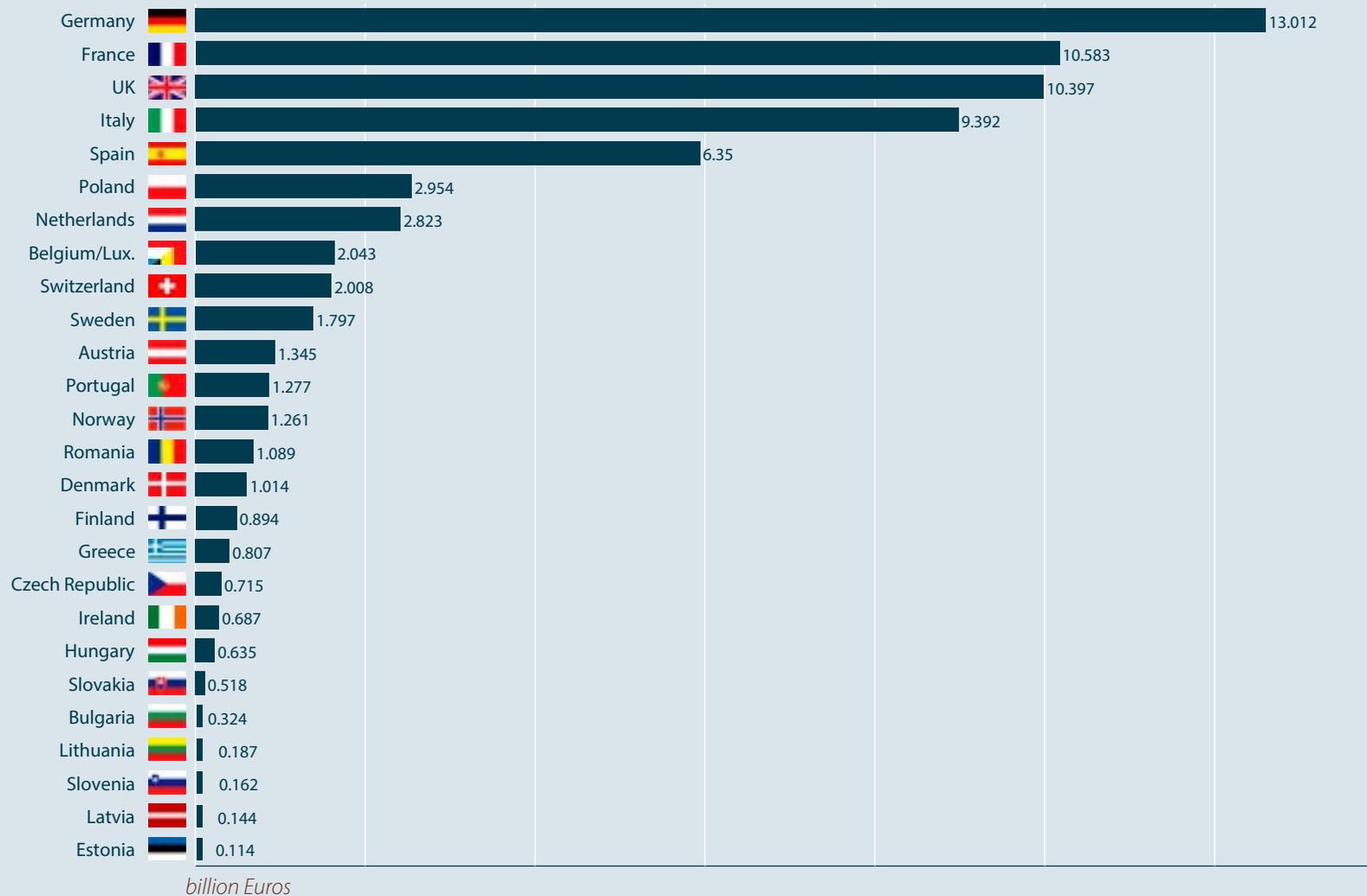


* MSP Source: Kline & Company Inc. (USA), Japan Cosmetic Industry Association (JCIA), Japan Dentifrice Manufacturers' Association (JDMA), Japan Soap and Detergent Association (JSDA), China, Brazil, India, S.Korea, (Euromonitor) according to Cosmetics Europe product nomenclature, assuming a MSP/RSP conversion factor of 1,6

** EU 28 + Norway and Switzerland estimated 72.5 bn EUR in 2014

***Due to different product definitions and exchange rates, regional associations may report different retail sales value for their respective markets.

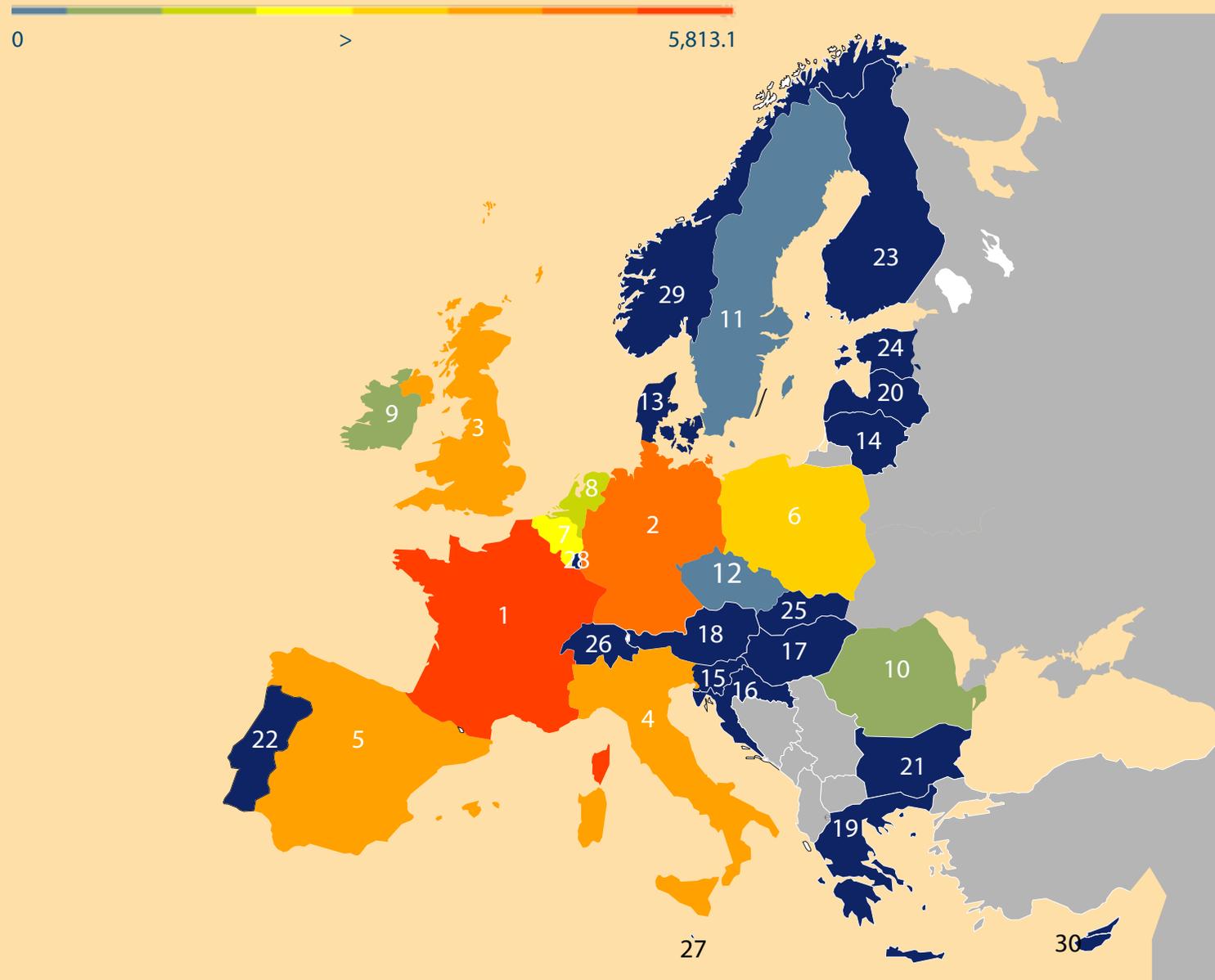
Market Volume per country



Total Europe*: 72.531 bn Euros
Total EU: 69.262 bn Euros

The European export market represented one third of the global market (Extra EU28)

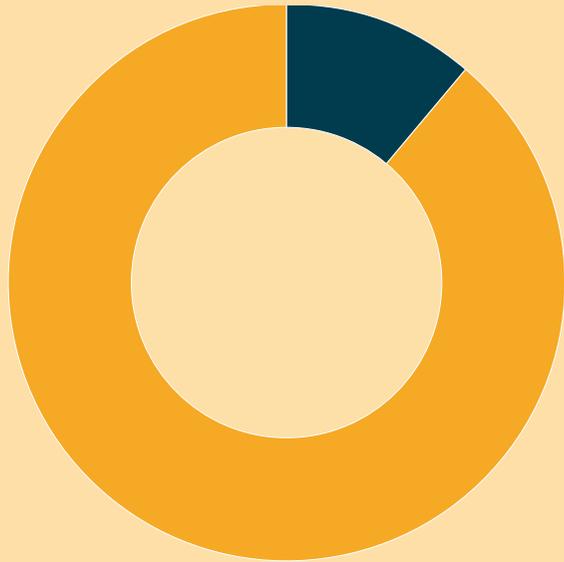
Country	EUR mn
1. France	5,813.1
2. Germany	2,863.6
3. UK	1,412.6
4. Italy	1,359.1
5. Spain	1,331.2
6. Poland	788.1
7. Belgium	764.0
8. Netherlands	359.6
9. Ireland	340.9
10. Romania	205.6
11. Sweden	198.8
12. Czech Republic	147.2
13. Denmark	115.6
14. Lithuania	94.6
15. Slovenia	83.1
16. Croatia	76.8
17. Hungary	64.1
18. Austria	54.2
19. Greece	45.9
20. Latvia	45.0
21. Bulgaria	42.3
22. Portugal	37.8
23. Finland	36.6
24. Estonia	17.3
25. Slovakia	14.7
26. Switzerland	12.8
27. Malta	9.2
28. Luxembourg	7.3
29. Norway	1.5
30. Cyprus	1.0
Europe 30	16,343.6



*Value Retail RSP, EUR mn; includes; Decorative cosmetics, Hair care, Fragrances, Skin care and Personal Care

Source: Cosmetics Europe, Euromonitor International

Employment Overview



Indirect employees
1,570,000



Direct employees
140,000

Total: circa 1.7 million employees



In 2014 the European cosmetics industry employed approximately **1,700,000** people including: **25,000** scientists

There are **514,000** life sciences students in Europe



Cosmetics Europe Conference 2014

Cosmetics at the Crossroads of Science and Regulation

Events in 2014

Cosmetics Europe Conference 2014:

'Cosmetics at the Crossroads of Science and Regulation', Brussels

The Cosmetics Europe Scientific Conference 'Cosmetics at the Crossroads of Science and Regulation' took place in Brussels on 10-11 June 2014.

The event brought together Cosmetics Europe members, corporate entities, trade organisations, regulators and industry leaders from around the world to look at critical developments that could directly impact cosmetics legislation across the value chain.

Through in-depth presentations and interactive breakout sessions, participants examined issues impacting cosmetics legislation such as:

- Trends and challenges in safety assessment and regulation for cosmetics
- Public-private partnership in research for alternative methods to animal testing
- The EU Cosmetics Regulation and future developments
- Legal responsibilities in the value chain

Speakers included:

- Martin Seychell, Deputy Director General for Consumers and Health, Health and Consumers, European Commission
- Prof. Arnd Hoever, Head of Unit, Novel Medical Developments, Research and Innovation, European Commission
- Dr. Horst Wenck, Corporate Vice-President Front End Innovation, Beiersdorf
- Beta Montemayor, Director, Environmental Science and Regulation at CCTFA (Canadian Cosmetic, Toiletry and Fragrance Association)

Cosmetics Europe Open Forum & General Assembly 2014:

'Consumers at the Heart'

The 2014 annual Open Forum and General Assembly took place in Brussels on 12-13 June 2014.

The year's theme focused on the crucial role of the consumer in every aspect of our thinking and featured an address from the EU Commissioner for Consumer Policy, Neven Mimica, on the European Consumer Agenda.





Events in 2014

continued

International Associations Collaboration

- IAC Meetings - February / June 2014

The International Associations Collaboration (IAC) held meetings on 26 February and 12 June alongside the PCPC Annual Meeting and Cosmetics Europe General Assembly respectively. Close to 20 cosmetics industry associations worldwide have already signed up to engage in this unique global inter-industry associations collaboration.

The IAC is truly becoming the most important platform for the global cosmetics industry to work together on specific topics (such as: cosmetovigilance, safety assessment principles, overview of ongoing trade negotiations, crisis communication, etc.) and develop a one-voice position that can be deployed in all of the participating regions.



- 8th Plenary Meeting of the ICCR, 8-10 July 2014

The International Cooperation on Cosmetic Regulations (ICCR), a voluntary cooperation between the health regulators and cosmetics industry associations in Canada, the European Union, Japan, the United States, Brazil and China, adopted a number of documents including recommendations on appropriate trace levels of lead and mercury in cosmetics, a report on the status of in-silico approaches for cosmetic ingredient safety assessments and an overview of approaches to regulate allergens in cosmetics.

The ICCR website which was developed with the support of the industry partners was launched and much welcomed by all the ICCR partners.

The chairmanship of the ICCR was handed-over to the European Commission who is chairing the 9th ICCR cycle.

[link to ICCR Website](#)



Publications 2014

The following publications were produced in association with our members and partners:

ANNUAL REPORT

- **Cosmetics Europe Activity Report 2013 – Consumers at the Heart**

MARKET PERFORMANCES

- **Cosmetics Europe Statistics 2013**

POSTERS

- **Quantitative Risk Assessment for Methylisothiazolinone in cosmetic products**

RECOMMENDATIONS

- **Cosmetics Europe Recommendation on the use of appropriate validated methods for evaluating sun product protection**
- **Cosmetics Europe Recommendation on the use of Methylisothiazolinone (MIT)**



Cosmetics Europe Activity Report 2013 – Consumers at the Heart



Cosmetics Europe Statistics Analysis 2013




Cosmetics Europe
the personal care association

Taking care of people, together

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PUBLICATIONS

- Taking care of people, together
- Use of Micro-Plastic Beads in Cosmetic Products in Europe and Their Estimated Emissions to the North Sea Environment
- Phenoxyethanol as a Safe and Important Preservative in Personal Care. See more [here](#)
- Retrospective Analysis of the Draize Test for serious eye damage/eye irritation: importance of understanding the *in vivo* endpoints under UN GHS / EU CLP for the development and evaluation of *in vitro* test methods
- The Cosmetics Europe strategy for animal-free genotoxicity testing: project status up-date
- Reduction of misleading (“false”) positive results in mammalian cell genotoxicity assays. III: sensitivity of human cell types to known genotoxic agents.
- The Cosmetics Europe strategy for animal-free genotoxicity testing: project status up-date.
- Categorisation of Chemicals According to Their Relative Human Skin Sensitising Potency
- Systematic evaluation of non-animal test methods for skin sensitisation safety assessment
- The SEURAT-1 approach towards animal free human safety assessment
- SEURAT: Safety Evaluation Ultimately Replacing Animal Testing- recommendations for future research in the field of predictive toxicology.



Use of Micro-Plastic Beads in Cosmetic Products in Europe and Their Estimated Emissions to the North Sea Environment

Publications can be downloaded from Cosmetics Europe website:
www.cosmeticseurope.eu

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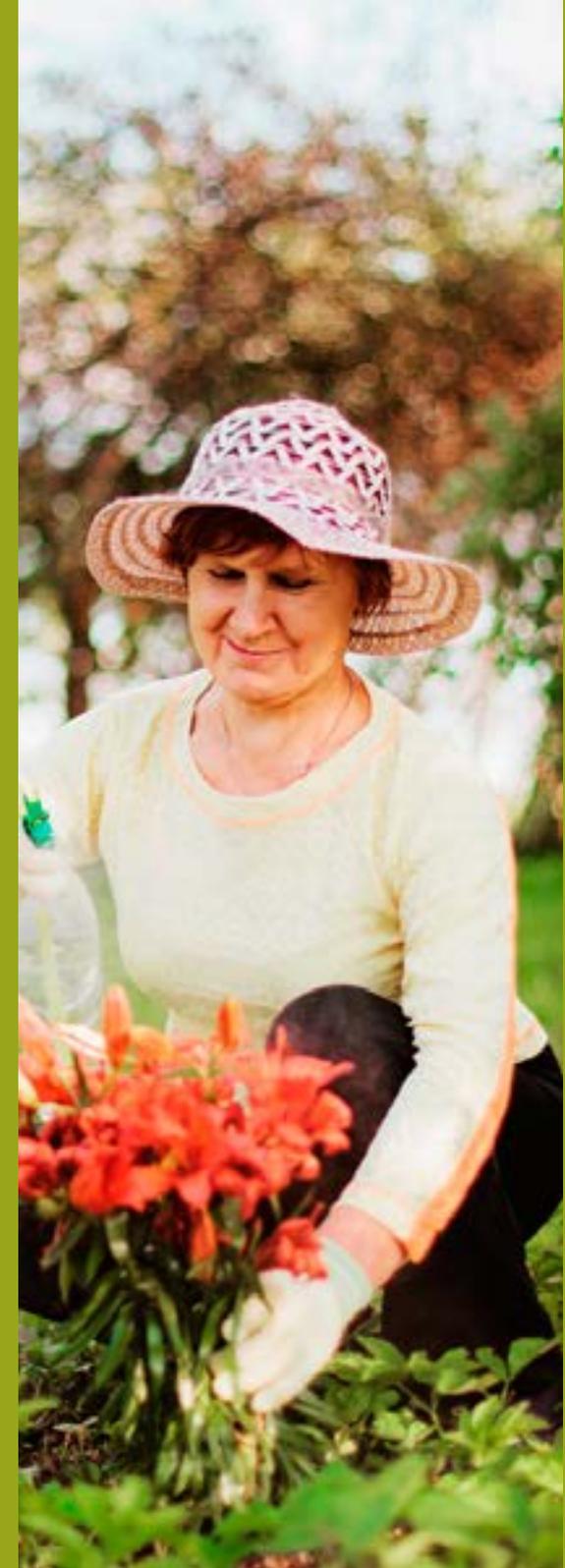
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Assistant DG/ Legal Affairs



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Science & Research



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