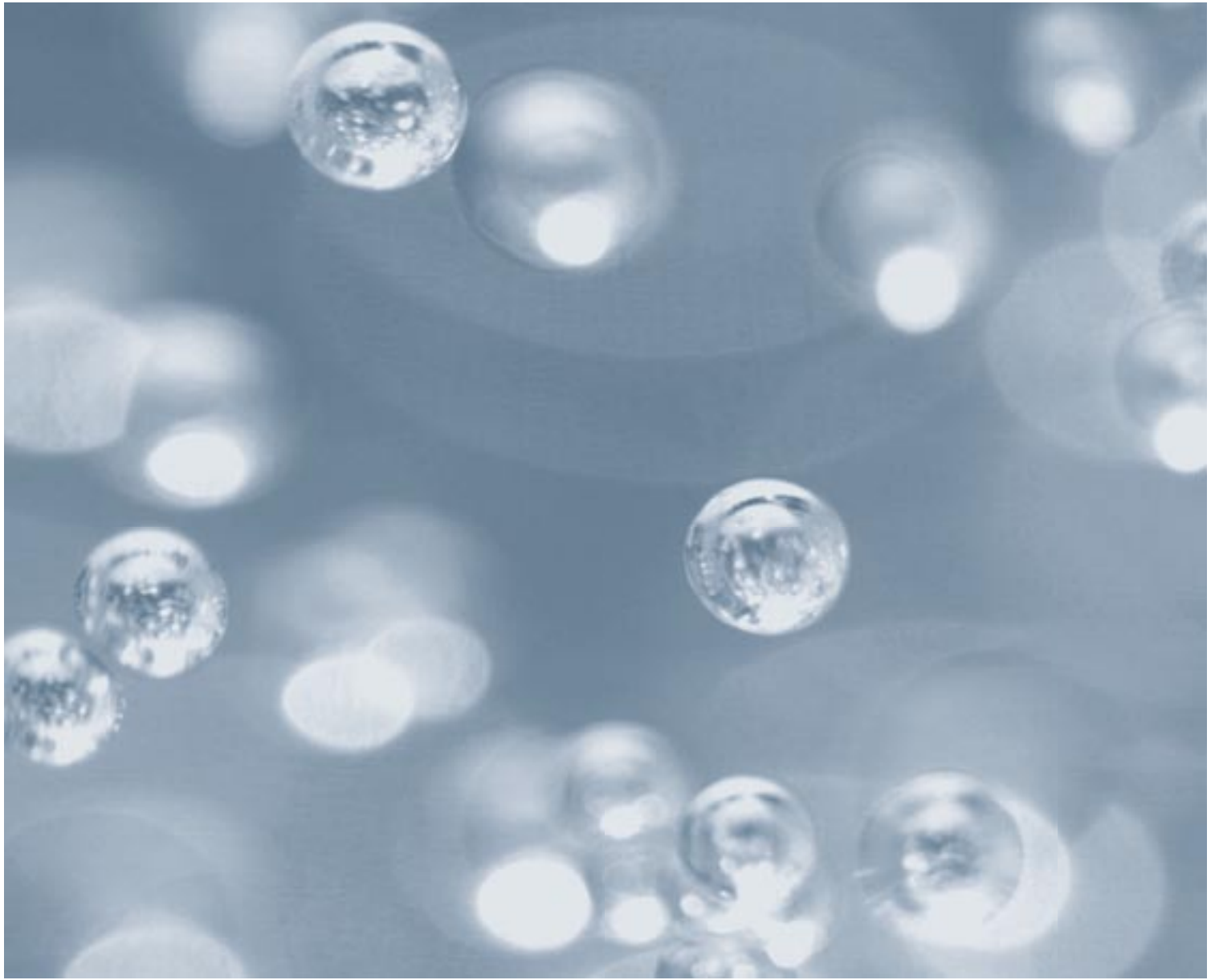




COSMETICS EUROPE:
ACTIVITY REPORT 2004



**Colipa
Activity Report 2004**



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FOREWORD COLIPA PRESIDENT



Françoise Montenay
PRESIDENT COLIPA
PRESIDENT CHANEL S.A.S

Cosmetics play an essential role in our daily lives. Four hundred and fifty million Europeans use a variety of cosmetic products on a regular basis. Consumers demand effective, innovative and safe products. Product safety and performance continue to be primary considerations for the cosmetics industry.

The cosmetics industry brings annually thousands of new or improved products into the market. This commitment to innovation is essential to allow the European industry to maintain its global competitiveness and to satisfy the consumer by improving the performance, safety and environmental impact of its products.

The European cosmetics industry today is a strong sector. As a major employer and important exporter, the industry contributes to the economic success of the European Union.

As the leader of a multinational cosmetics company, it was a great honour to take up the presidency of the Colipa Board of Directors in June 2004. I would like to take this opportunity to especially thank Enrique Puig for his great support over the past years as Colipa President.

I will strive during my presidency period to further foster the dialogue between our industry and our stakeholders in order to maintain innovation capabilities and effective regulatory frameworks, taking into account expectations and needs of our stakeholders.

I will also strive to benchmark all Colipa's activities to the core principles set out in the Colipa mission statement: earning public trust, achieving effective public policy and enhancing member value.

This first Colipa Annual Report for 2004 clearly underlines the willingness of the European cosmetics industry to engage in such a dialogue. It gives an overview of the associations' activities in a changing environment and schedules the many challenges we face.

I wish you a pleasant reading.



«I will strive to benchmark all Colipa's activities to the core principles set out in the Colipa mission statement: earning public trust, achieving effective public policy and enhancing member value.»

INTRODUCTION DIRECTOR-GENERAL COLIPA



Bertil Heerink
DIRECTOR-GENERAL COLIPA

Over the last years, the cosmetics industry has been faced with increasing demands from regulatory authorities at national, European and international levels. It is recognised that our industry must take the necessary measures to respond and offer solutions to these demands. In addition, scientific circles and consumer groups have been calling for an increased level of transparency regarding ingredients and products and expect the industry to perform and provide clear communication.

In order to enhance public trust, Colipa has significantly upgraded and professionalized its communication, and demonstrated both its willingness to engage in the public debate and its readiness to interact with all stakeholders in a transparent manner. This first edition of the Colipa Annual Report is one important way in demonstrating our commitment to transparent communication with interested stakeholders, and we hope that this Annual Report reflects to a wide audience the excitement and quality of the work carried out by Colipa.

In 2004, Colipa welcomed colleague associations from the new Member States as full Colipa members. Colipa has also successfully implemented the restructuring of its organisation and has developed a clear strategy for the coming years, based on the core principles of our Mission Statement: earning public trust, achieving effective public policy and enhancing member value. This strategy will be reflected in all areas of its activities: Product Management & Research, Legal & International Affairs as well as Communication & Public Affairs.


Colipa's key priorities of 2004 were:

- Ensuring effective and an efficient implementation of the 7th amendment to the Cosmetics Directive,
- Achieving a balanced REACH and delivering a pro-active input in shaping the next generation of the European regulatory framework on the basis of a comprehensive strategy,
- Expanding collaboration at an international level, which continues to represent a fundamental area to help facilitate business, ensure the competitiveness of the European cosmetics industry and demonstrate the leadership of the European industry at global level.

The following activity report clearly shows that we have been addressing these issues in our daily work during 2004. It is also a great honour for Colipa that Ms Dagmar Roth-Behrendt, Vice-President of the European Parliament and Mr Robert Madelin, Director-General for Health and Consumer Protection of the European Commission have contributed to this report outlining future challenges for our industry from a stakeholder's perspective. You will also find useful information about the organisation, its members and staff, as well as a list of publications and highlights of Colipa events.

I would like to take this opportunity to thank all our members for their indispensable support and valuable expertise throughout 2004.

Colipa will continue to strive to meet the expectations of its members and stakeholders alike and I hope you will find the Annual Report both valuable and interesting reading.



«Colipa will continue to strive to meet the expectations of its members and stakeholders»

KEYNOTE MESSAGE DAGMAR ROTH-BEHRENDT

This annual report covers a period that has seen some very important developments in the regulatory environment in which the cosmetics industry operates. As the rapporteur on the 6th and 7th Amendments to the Cosmetics Directive and as a Member of the European Parliament's Committee on Environment, Food Safety and Public Health, which was responsible for this issue, I was deeply involved in the legislation which now, step by step, is becoming a reality. I am glad that since 2004 these ambitious standards that we worked out in order to achieve a better and sustainable protection for consumers and animals, are now implemented in the national laws of all Member States of the European Union.

For example, from March 2005 cosmetic products will have further information on the label to identify substances often linked to allergic reactions to fragrances or perfume. This will help allergic consumers to identify whether they can safely use a product or not. Moreover, new labelling provisions with regard to the time period within which a product remains usable are being introduced. An easily understandable symbol will be put on cosmetic products to show how many months or years it can be used safely and how long it stays valid after opening. Last but not least, the European Commission will shortly publish long-awaited guidelines on the use of claims referring to the absence of tests on animals.

What are my expectations as a Member of the European Parliament on the future cooperation with the cosmetics industry and the challenges we are facing? After the discussions on the 6th Amendment, a time when industry still had a fundamental and not very transparent and cooperative approach, I now notice a considerable improvement in working relations and feel that we are establishing a better level of trust.

However, there is still room for further improvement. When it comes to the question of developing alternatives to tests on animals, I expect a clear commitment - including capital investment from the industry.

Apart from the question of alternatives to tests on animals, one of the biggest challenges for the cosmetic sector in 2005 and 2006 will be the Commission's proposal for a new Chemicals Regulation - REACH. It aims at safeguarding the use and production of chemicals in Europe. Compared to many other sectors, the Cosmetics Directive already ensures a high level of protection to public health. Therefore, we must avoid a situation where substances are evaluated under two different regulatory systems, which may be contradictory - particularly with regard to unnecessary animal testing.

I am looking forward to continuing cooperation and discussion with Colipa on the up-coming issues.

Dagmar Roth-Behrendt
VICE-PRESIDENT
EUROPEAN PARLIAMENT



Dagmar Roth-Behrendt
VICE-PRESIDENT
EUROPEAN PARLIAMENT

«Compared to many other sectors, the Cosmetics Directive already ensures a high level of protection to public health.»

KEYNOTE MESSAGE ROBERT MADELIN



Robert Madelin
DIRECTOR-GENERAL
HEALTH & CONSUMER
PROTECTION - EUROPEAN
COMMISSION

The cosmetics industry is a European success story. Despite intense competition from other parts of the globe, European companies continue to be the market leaders and produce the world's most desirable brands.

For the European industry to maintain its success, of course, it must innovate and develop new products. However, it also needs to retain the trust and loyalty of its customers. The relationship between the consumer and the product in your sector is particularly close: cosmetics and personal hygiene products are used on a daily basis, often in the most intimate ways. Consumers expect these products to be safe and need to trust the companies that produce them to reflect their personal values and aspirations as individuals. Looked at from this perspective, the role of the European Commission and other EU institutions as regulator is vital to assuring the continued success of the sector.

The overriding goal of the Directorate General for Health and Consumer Protection is that consumers be safe, healthy and confident. To achieve this, the bare minimum I want to see is rigorous and independent risk assessment of products and their ingredients. Where significant risks are identified I want to see swift and effective actions to eliminate, or at least manage, those risks.

But even for safe products, I welcome the recently established Colipa system to provide the consumer with specific information on cosmetic products. There is potential for other initiatives like this, particularly ones to give more

and better information on product safety and animal welfare issues. Effective and trustworthy communication will be the key to maintaining trusts and boosting confidence among consumers.

Our ultimate common goal, then, should not just be that the products on the EU market are safe, but that consumers also perceive them to be safe. The latest reforms to the Commission's scientific committees are an important step in this direction. With the Scientific Committee on Consumer Products (SCCP) we have introduced a number of innovative processes to allow for improved stakeholder dialogue, for the submission of data and for the procurement of additional specialised expertise. We expect Colipa members not only to benefit from these improvements, but also to engage in the process in an equally open and transparent manner.

The final arbiters of whether the Commission and the industry are getting it right will be European consumers. Improving our communication with them is, perhaps, one of the most important challenges ahead of us. This is just one area where I look forward to a constructive and fruitful relationship with Colipa and its members in the coming year.

Robert Madelin
DIRECTOR-GENERAL
HEALTH & CONSUMER PROTECTION
EUROPEAN COMMISSION



«Despite intense competition from other parts of the globe, European companies continue to be the market leaders and produce the world's most desirable brands.»

➔ PRODUCT MANAGEMENT

ACTIVITY REPORT FROM THE PROGRAMME COMMITTEE

PRODUCT MANAGEMENT



Christian Monnais
CHAIRMAN
PROGRAMME COMMITTEE
PRODUCT MANAGEMENT

The General Assembly's decision to re-organise the Colipa structure and to create a new issue management system (based on a Programme Committee structure), clearly influenced the activities of last year. The Programme Committee Product Management (PCPM) completed the first stage of this process by February 2004, by developing its Terms of Reference, Operating Rules and a 2004 Workplan, and by April, it had put into place the Project Team structure necessary to carry out the planned activities. Drafting the Product Management part of the comprehensive Colipa strategy was the final stage in setting up the new technical organisation.

2004 was probably one of the most challenging years with regard to regulatory developments affecting cosmetic product management. With this in mind, the group was satisfied with its responsiveness to the issues raised and feels ready to face the challenges of the coming years.

The European Commission changed its scientific advisory bodies, including the Scientific Committee for Consumer Products (SCCP) which is responsible for cosmetic products. In addition, it held six Ad Hoc Working Party meetings. The preparation and follow-up of these key stakeholder meetings in which proposals for Technical Adaptations to the Cosmetics Directive are considered, continues to be a key activity of PCPM.

IMPLEMENTATION OF THE 7TH AMENDMENT

In order to ensure a harmonised application of the 7th Amendment throughout the EU, it was necessary to develop practical guidance to the «users» of the Cosmetics Directive (i.e. industry and control authorities). Colipa successfully worked with the Commission and Member States, in particular with regard to practical solutions to the issues of «Period after Opening» labelling and on the provision of product information to consumers. On the latter, Colipa's proposal of an Internet directory that will contain the names and contact points for all cosmetic manufacturers throughout the European Union was accepted [www.european-cosmetics.info]



COSMETICS DIRECTIVE
CONSOLIDATED VERSION



In parallel, Colipa worked on a comprehensive technical guidance document in order to enable manufacturers and importers to carry out the necessary changes to production and packaging. A first version of this document was issued as early as June 2003 and has been updated several times throughout 2004.

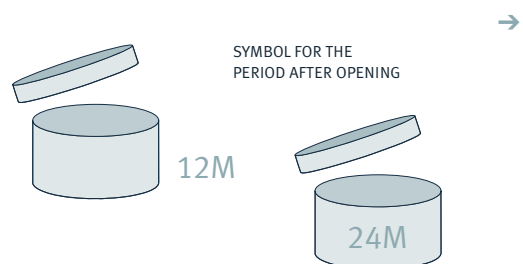
REACH: THE EUROPEAN CHEMICALS POLICY REVIEW

Colipa supports the objectives of REACH, as outlined in the European Commission proposal of 29 October 2003 and submitted to the European Parliament and the Council of Europe under the EU co-decision rules, particularly as regards the protection of human health and the environment, and maintenance and enhancement of the competitiveness of the EU industry.

Colipa has given priority to the technical aspects of the text, to their understanding and to the analysis of their potential consequences for the cosmetics industry.

IN-MARKETS SURVEILLANCE AND COLLECTION OF ADVERSE EVENTS REPORTS

In the context of increased market surveillance at EU level, it is crucial that industry data are considered as credible and reliable. The Board of Directors, therefore, approved a PCPM proposal to work on guidelines regarding handling and processing of adverse events and an initial draft document has been developed which describes a workable and robust system.



SUN PROTECTION

In 2004, industry has made significant progress in terms of international standardisation and self regulation of UV-related testing methods and claims. However, in Europe, these industry initiatives were not clearly communicated outside the industry. In 2004, sun protection became a focal point for the attention of EU authorities. Colipa agreed with the Commission to have an in-depth debate at the beginning of 2005 which would give the industry the possibility to present its initiatives.



MAJOR INGREDIENT ISSUES

Colipa has continued to respond to concerns voiced by differing stakeholders throughout 2004. Some of the ingredients under scrutiny included phthalates, aluminium salts, alpha hydroxyl acids, certain preservatives, isoflavones, synthetic musks, and hair dyes.

PCPM co-ordinated the preparation of well-founded industry responses and their communication to members, authorities and other interested parties. Where necessary, PCPM also oversaw the submission of safety dossiers to the European Commission and its Scientific Committee.

Finally, PCPM increased its level of collaboration with the US Cosmetic, Toiletry & Fragrance Association (CTFA) on ingredient issues through early alerts and joint action plans.





RESEARCH

ACTIVITY REPORT FROM THE PROGRAMME COMMITTEE RESEARCH



Odile De Silva
CHAIRMAN
PROGRAMME COMMITTEE
RESEARCH

The decision to strengthen Colipa's technical structure and to create a Programme Committee Research has allowed an integrated research programme to be set up. Colipa's activities have always incorporated association-level research projects, however they addressed specific issues on a short term basis. The exception has been the continued programme on development and validation of alternatives to animal testing which started in 1992.

The main objectives of the Programme Committee Research (PCR) are to provide the Board with expertise and advice on all scientific research matters of common concern to industry, in particular with regards to identification and development of methods, in order to propose new approaches and strategies relevant for the safety evaluation and analysis of cosmetic ingredients, and that can be used in a business context to

- more effectively steer emerging scientific issues and
- equip the cosmetics industry with the necessary tools to meet regulatory requirements.

By February 2004, PCR had developed a list of identified priority issues for the next 5 years. By April, PCR had put into place the Project Team structure necessary to carry out the planned activities.

ALTERNATIVES TO ANIMAL TESTS

SCAAT, Colipa's Steering Committee on Alternatives to Animal Testing continued its mission of coordinating the overall industry efforts in the development and acceptance of alternatives to animals in cosmetic safety evaluation, as well as leading a Colipa-funded research program in specific areas. The final goal of this research is to develop non-animal methods that would proceed to formal validation by the European Commission.

The research in **eye irritation** aims at a better understanding of the cellular and molecular mechanisms of chemically induced eye irritation and recovery. An experimental in-vitro corneal culture/perfusion system has been developed. Different corneal epithelial cell lines have been evaluated with a view to constructing in-vitro models reacting similarly to irritants as the human eye. Other areas of potential interest, such as changes in gene expression induced by chemicals during injury and recovery, were explored to complement the current research program. Moreover, a close collaboration with ECVAM, (European Centre for Validation of Alternative Methods), has been established.



The European Commission's approach regarding **skin irritation** is to validate alternative methods that would allow classification of chemicals into irritants or non-irritants. In a complementary approach addressing risk assessment considerations (i.e. the aspect of «how irritant») Colipa's research continued to focus on the evaluation of mechanisms of the less severe skin irritation response. The aim is to identify novel genomic and proteomic markers of chemical irritation in human skin models.

In 2004, Colipa completed a project examining **skin-allergy** induced changes at the genomic level in cell culture models. As a next target the sensitivity of the response will be explored with a view to developing an in vitro assay for predicting skin sensitization potential. Work is also conducted aiming to define an optimized cell line culture system for the identification of skin allergens. Furthermore, a collaborative project for the development of a peptide reactivity assay for predicting skin allergens was initiated in 2004. An important opportunity arose with the third call for tender under the Commission's 6th Framework Programme for Research. Colipa joined as a partner in the drawing up of a proposal for an integrated, multi-partner project on the development of alternative methods for skin allergy and respiratory allergy: Sensitiv. This project, which has been recently accepted will not only give a significant additional boost to the development of alternative methods in this area, but it will also demonstrate the commitment of industry.





CONSUMER EXPOSURE STUDY

This research project was initiated in 2003 with the objective of ensuring that EU risk assessments on cosmetics are based on real-life up-to-date exposure data. The study involves a large-scale investigation in five EU-countries and a local complementary study in one EU country. It will provide information on the quantity of cosmetic products used per application and the frequency of product use. A new Project Team «Probabilistic Risk Assessment» will examine the results and prepare a recommendation for the use of probabilistic exposure data in the risk assessment process.

SKIN ALLERGY

In 2004 PCR intensified work on defining a state of the art risk assessment approach, specifically applied to perfume ingredients... Results are expected during 2005 and will form the basis of stakeholder discussions with scientific opinion leaders.

ENDOCRINE DISRUPTION

PCR prepared a draft strategy outline as well as a scientific review document of the issue from a risk assessment perspective. PCR & PCPM recommend to use this document as the basis of an expert workshop inviting leading experts in the field. The workshop should result in a peer-reviewed publication with high visibility and acceptability by scientific decision makers in the EU.

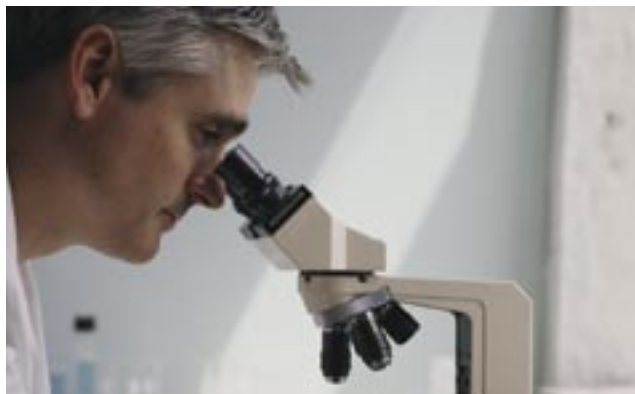
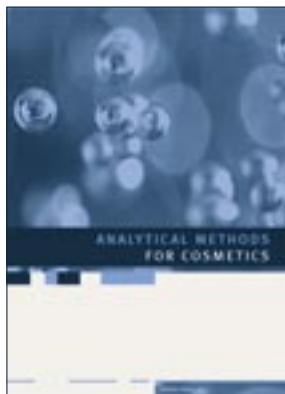
IMPLEMENTATION OF THE 7TH AMENDMENT

Besides the management of the actual research activities, PCR played an active role in the industry interpretation and implementation of the 7th Amendment of the Cosmetics directive. In particular, PCR contributed to Colipa position on the Commission Guidelines on «non-animal tested» claims. Furthermore, PCR co-ordinated Colipa's input into the Commission's stakeholder group that developed the scientific background report for the Timetable on Alternatives Methods. This consensus report, with input from scientists nominated by the Commission, ECVAM, animal welfare and industry, is a major step towards a realistic assessment of the status and prospect regarding alternative methods.

PROJECT MANAGEMENT

One consequence of the increase in number of Colipa funded research projects was the realisation that the structures and resources previously in place through Project Teams, Task Forces and staff would become insufficient to ensure an efficient management of this complex area of Colipa's activity. PCR developed a set of project management tools for its project management which also allow Colipa members an easier access to project related information such as project descriptions, contracts, financial schedule, deliverables, milestones, reports or intellectual property rights of results.

ANALYTICAL METHODS FOR COSMETICS





LEGAL AFFAIRS

ACTIVITY REPORT FROM THE PROGRAMME COMMITTEE LAW & COMPETITIVENESS



Yves De Bruyne
CHAIRMAN
PROGRAMME COMMITTEE LAW
& COMPETITIVENESS

LEGAL AFFAIRS

The legal environment in which the cosmetics industry operates is changing rapidly. Of course, the review of the Cosmetics Directive and the implementation of the 7th Amendment played a key role in 2004. Neighbour sectors such as the biocides or the pharmaceuticals industry were also exposed to changes in their legal framework, which Colipa monitored with interest. Colipa's main tasks in 2004 were twofold: on the one hand it was important to monitor the Cosmetics Directive, the backbone of the cosmetics industry; on the other hand it was essential to strive for a clear legal framework for the cosmetics sector.



COSMETICS DIRECTIVE
EXPLANATORY BROCHURE

BORDERLINE PRODUCTS

In 2004 the Medicinal Products Directive was revised, resulting in a new definition of medicinal products. A provision also stipulates that the Medicinal Products Directive should prevail over other legislation when after having taken into account all characteristics of a product, doubts still remain over the product's category. This prevalence of pharmaceutical legislation is consistent with existing case-law of the European Court of Justice.



COSMETICS DIRECTIVE
CONSOLIDATED VERSION

The new provision is directly linked to other sectors and is of high relevance because the Medicinal Products Directive provides for a pre-approval system whereas the Cosmetics Directive is based on an in-market control approach. The Commission organised a stakeholder workshop where Colipa participated and recognised that at this stage there is no need to issue further guidance on the borderline between cosmetics and pharmaceutical products. The issue will remain under observation by Colipa.

IMPLEMENTATION OF THE 7TH AMENDMENT OF THE COSMETICS DIRECTIVE

Commission guidelines on animal testing claims

The 7th Amendment to the Cosmetics Directive recognises that «not tested on animals» claims should be possible, but also recognises that there is the potential for these claims to mislead consumers. In order to adopt guidelines on the use of these claims, the Commission organised stakeholder meetings with Member States, industry and animal welfare groups. The outcome of the discussions was a text of draft Commission guidelines which were later approved by the member states and slightly modified by the



«The legal environment in which the cosmetics industry operates is changing rapidly. The revision of the Cosmetics Directive and the implementation of the 7th Amendment played a key role in 2004.»



European Commission due to comments from the European Parliament. Colipa welcomes most of the changes which clarified the guidelines.

Placing on the market

The 7th Amendment to the Cosmetics Directive also provides that Member States shall take all necessary measures to ensure that from 11 March 2005 neither manufacturers nor importers established within the Community «place on the market» cosmetic products which do not comply with new labelling requirements. However, the Directive does not define what is meant by «placing on the market». A clear and harmonized interpretation is of fundamental importance for legal certainty both for the industry and the regulators. Colipa has coordinated EU-wide efforts to obtain a consistent interpretation of this concept by the national authorities. Most of the EU Member States now share the same concept of «placing on the market». Colipa will monitor any further developments.



INTERNATIONAL AFFAIRS

ACTIVITY REPORT FROM THE PROGRAMME COMMITTEE INTERNATIONAL COOPERATION



Pierre Perrier
CHAIRMAN
PROGRAMME COMMITTEE
INTERNATIONAL CO-OPERATION

2004 has been a year of both consolidation and new challenges for Colipa's international activities.

On the one hand, Colipa has seen the culmination of certain activities such as the support to the transposition of the Cosmetics Directive in the 10 new Member States, as well as an increased involvement and cooperation with certain key countries such as China.

On the other hand, 2004 has been a year of consolidation of the Colipa international strategy namely in the form of increased cooperation with Colipa's sister associations, which will materialise in 2005.

INTERNATIONAL COOPERATION

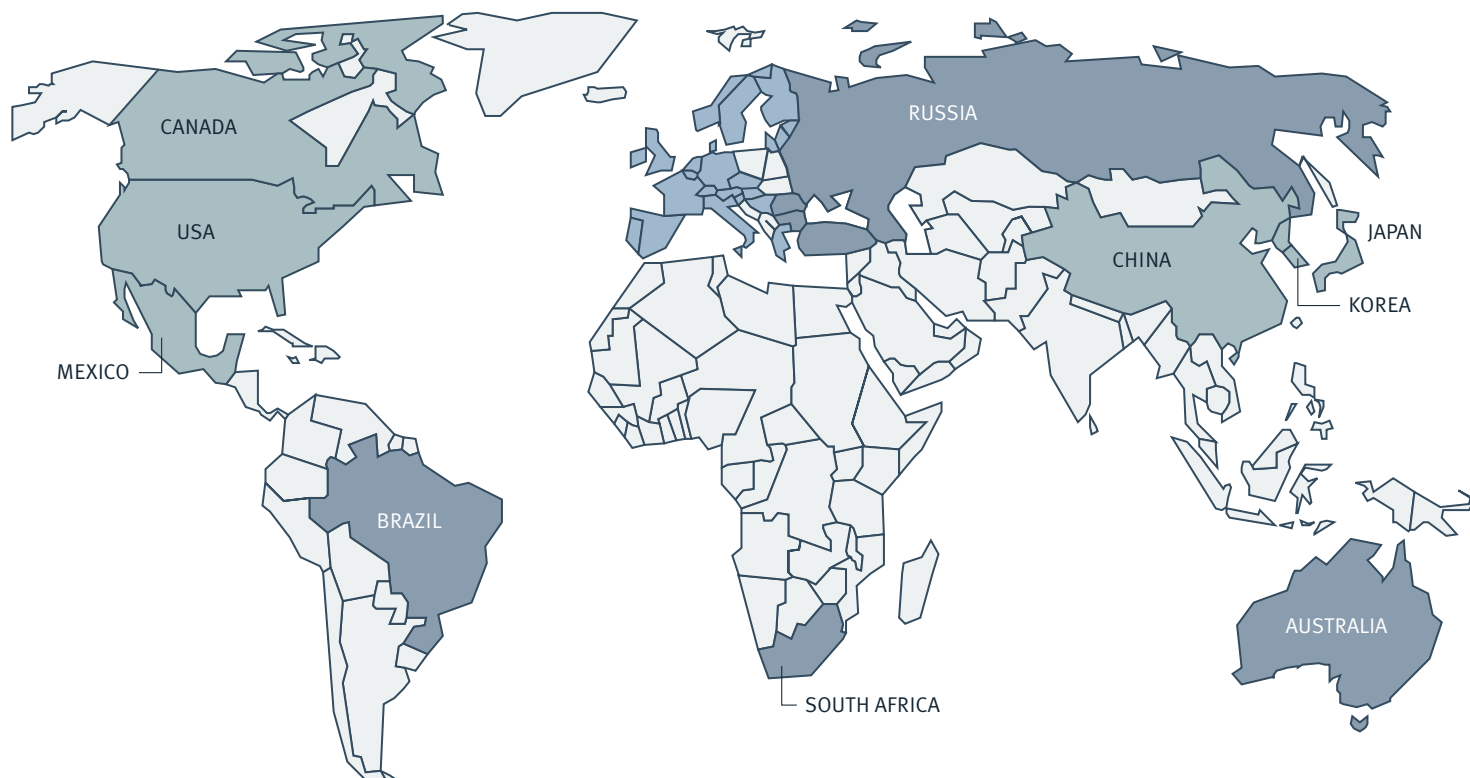
Cooperation with sister associations

Colipa is actively engaged in the cooperation with sister industry associations, namely the US Cosmetic Toiletry and

Fragrance Association (CTFA) and the Japanese Cosmetics Industry Association (JCIA), with regards to the alignment of cosmetics regulations around the world. As a follow-up to the Mutual Understanding meeting in Tokyo in 2003, Colipa, the CTFA and the JCIA have worked closely together on a number of regulatory issues of common interest. This has materialised in an exchange of position papers and participation of staff in certain meetings of other associations.

In 2004 this cooperation was extended to the Canadian Cosmetic Toiletry and Fragrance Association (CCTFA) in particular with respect to the common preparation of the upcoming regulatory dialogue meeting between Canada, the U.S., Japan and the European Union in March 2005 in Ottawa (Cosmetic Harmonisation and International Cooperation-meeting - CHIC).

COLIPA IS ACTIVE
ON A GLOBAL SCALE



Comparative study on cosmetics legislation

The consultant Risk & Policy Analysts (RPA) finalised in September 2004 the study «*Comparative Study on Cosmetics Legislation in the EU and Other Principal Markets with Special Attention to so-called Borderline Products*» on behalf of the European Commission Directorate General for Enterprise. This study constitutes a relevant analysis of the main trends in cosmetics regulations alignment throughout the world. Colipa actively participated in the consultation phase of the study.

CENTRAL AND EASTERN EUROPEAN COUNTRIES

EU candidate countries

10 new countries joined the European Union in May 2004. Colipa actively supported the transposition of the *acquis communautaire* in the new EU Member States. Colipa remains active in providing technical and legal expertise to the industry associations of the remaining and future EU candidate countries.

Russia

Russia is in the process of revising its cosmetics regulations to transpose the main elements of the EU Cosmetics Directive. In order to ensure consistency with the requirements of the European regulations, Colipa has closely worked in 2004 with the Co-ordinating Council of the Cosmetics Industry in Russia, which is composed of the two Russian industry associations PCAR and APCOHM.

ASIA

China

In 2004 Colipa increased its contacts with the Chinese Authorities responsible for cosmetics products with a view to finding alignment opportunities between the regulatory system in China and in the European Union. Colipa met high-level officials of the Chinese Ministry of Health (MoH), State Food and Drug Administration (SFDA), Administration for Customs Administration and Quarantine (AQSIQ), State Administration for Internal Commerce (SAIC) and Ministry of Commerce in a mission of Colipa to China in September 2004. A closer future cooperation was agreed and will be pursued in 2005, in close collaboration with the European Commission and the European Union Chamber of Commerce in China (EUCCC).

LATIN AMERICAN COSMETICS
INDUSTRY COUNCIL MEETING,
MEXICO, JULY 2004

LATIN AMERICAN HEALTH
AUTHORITIES MEETING,
MEXICO, JULY 2004



LATIN AMERICA

Colipa has increased its links during 2004 with the representatives of the cosmetics industry in Latin America. Colipa was invited by the Brazilian Association of the Cosmetics Industry (ABIHPEC) and the Latin American Cosmetics Industry Council (CASIC) to participate in a CASIC and a Latin American Health Authorities meeting in Mexico in July 2004.

This meeting served to re-confirm Colipa's intention to support CASIC in becoming the interlocutor of the cosmetics industry in Latin America. Colipa committed to provide assistance to CASIC whenever needed, namely in the support of the Latin American regulatory harmonisation process in the field of cosmetics.

Korea

In 1998, Colipa launched a complaint under the EU Trade Barriers Regulation (TBR) against the regulatory requirements in Korea for the importation of cosmetics and functional cosmetics. In 1999, the European Commission concluded an agreement with the Korean Government to finalise the investigations on condition that certain changes be made in the Korean legislation. Although some improvements have been made, the European Commission's TBR investigations remain open as some of Korean regulations have not improved yet. Colipa, in cooperation with the Commission, will closely monitor further regulatory developments in Korea.



COLIPA MISSION TO CHINA,
BEIJING, SEPTEMBER 2004

COMMUNICATIONS AND PUBLIC AFFAIRS

ACTIVITY REPORT FROM THE PROGRAMME COMMITTEE COMMUNICATIONS



Charles Laroche
CHAIRMAN
PROGRAMME COMMITTEE
COMMUNICATIONS

2004 marked an important departure point for Colipa communications – a year characterised by both careful analysis and concrete action.

Building on the results of a perception study carried out at the beginning of the year, a comprehensive communications strategy was developed as a key enabler for improving confidence and trust in the industry and in Colipa itself.

Perhaps the most obvious illustration of this was our work to implement the 7th Amendment to the Cosmetics Directive. This achievement included a close interaction with EU Institutions, the publication of an explanatory leaflet and the launch of the public access website directory. Equally importantly, further resources have been dedicated to SCAAT, which coordinates industry activities to develop alternative approaches to animal testing.

We look forward to continuing the good work in 2005 and to further strengthening contacts with all our stakeholders.

FURTHER IMPROVING INFORMATION ACCESS: THE WEBSITE DIRECTORY OF COSMETIC COMPANIES

2004 saw the 7th Amendment to the Cosmetics Directive entering into force. One of the key new requirements was the improved information access for consumers.

Consumers may have specific questions regarding the product composition and safety that are not necessarily answered on the product information label.

In an effort to provide consumers easy access to cosmetic company contact details, the industry has, in conjunction with the European Commission and the Member States of the EU, established a new central website.

→ www.european-cosmetics.info

If a company whose products for which the consumer wishes further information is not listed on the website, or if the consumer does not have access to the internet, email or a telephone, he/she can contact the company in question by writing to the address on the label. In addition, individual company care-lines continue to provide consumer advice.

THE LAUNCH OF THE EUROPEAN DIRECTORY OF PUBLIC ACCESS WAS WELCOMED BY STAKEHOLDERS AND MEMBERS AS WELL



PUBLIC AFFAIRS

In accordance with its Mission Statement, Colipa launched a perception study early 2004 in order to better understand our stakeholder's expectations towards the cosmetics industry. The outcome of study 2004 showed that there is a clear mismatch between consumers' appreciation of products and overall industry perception.

In order to address the findings of the perception study Colipa has intensified its communication activities, thereby fostering openness & transparency with the aim to increase knowledge of our industry in political circles and build confidence and trust with all stakeholders. Active dialogue with stakeholders on the implementation of the Cosmetics Directive and the currently discussed review of the European chemicals policy (REACH) formed an integral part of our public affairs activities and the Information day held in March 2004 was dedicated to these 2 issues.

NEW HOUSE STYLE

In the past year, Colipa has developed a communication strategy to meet the needs of its members and the expectations of its stakeholders. This strategy will form the basis for a continuous dialogue with all interested stakeholders.

In order to better reflect what our industry stands for, a new house style with the goal to better foster understanding on the issues of relevance to our industry was developed and our new calling card and this Annual Report are first results of this new house style.



NEW COLIPA CALLING CARD

CONSUMER INFORMATION
LEAFLET «COSMETIC
LABELLING - CHANGES
EXPLAINED»

«a comprehensive communications strategy was developed as a key enabler for improving confidence and trust in the Industry and in Colipa itself.»

MS MONTENAY, PRESIDENT OF CHANEL S.A.S WAS ELECTED NEW COLIPA PRESIDENT DURING THE GENERAL ASSEMBLY IN AMSTERDAM



➤ COLIPA EVENTS

COLIPA GENERAL ASSEMBLY 2004

The Colipa General Assembly 2004 was devoted to the competitiveness of the cosmetics industry in the enlarged Europe. Speakers covered this issue from various angles. Views were shared on the entrepreneurial climate in the enlarged Europe and expected developments in this area. Reports were given on policy recommendations for future legislation to the European Commission and information was made available on the new political landscape in Brussels.

The General Assembly also elected Ms Françoise Montenay, President of CHANEL S.A.S as the new Colipa President. Françoise Montenay succeeded Enrique Puig, who had led the organisation successfully for the previous 3 years.

The Scientific Forum focussed on a range of scientific and regulatory issues of importance to our industry such as «Risk Perception of Consumers: the Role of Authorities in Communicating Safety Issues», keynote speech of Ms Irene Van Geest, Director Communications, Dutch Food and Safety Authority.

The afternoon session was more concerned about technical regulatory issues on how to improve the quality of a European Cosmetic Ingredients Dossier and the progress towards validated alternatives to animal testing.

All in all, the topics discussed in Amsterdam were very much appreciated by over 200 participants.

2004 not only witnessed the enlargement of the EU to 25 Member States but also Colipa enlarged by welcoming colleague associations from the new Member States as well as Norway and Switzerland as full Colipa members.

FURTHER ACTIVITIES IN 2004

In the week of 19-23 January, several activities were organised: the Public Affairs Seminar, TAIEX Seminar on the Cosmetics Directive, the statistics workshop and a seminar on the new chemicals policy (REACH).

INFORMATION FORUM 30-31 MARCH

On 30-31 March Colipa organised an Information Forum on the 7th Amendment and REACH. Representatives of the European Commission, Bureau Européen des Unions des Consommateurs (BEUC) and other stakeholders entered into dialogue with Colipa members.

THE INFORMATION FORUM ORGANISED BY COLIPA ON 30-31 MARCH IN BRUSSELS





WOUTER PFEIFER, DIRECTOR OF THE DUTCH ASSOCIATION, (NCV) DURING THE GALA DINNER OF THE GENERAL ASSEMBLY IN AMSTERDAM ON 24 JUNE 2004



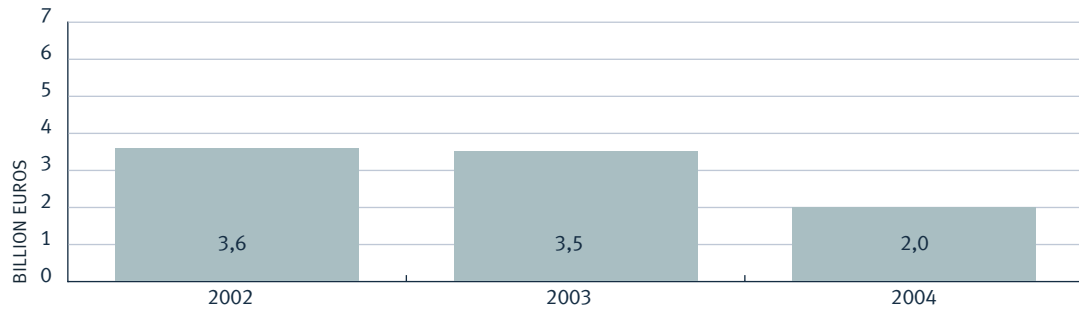
VISIT TO ENKHUIZEN



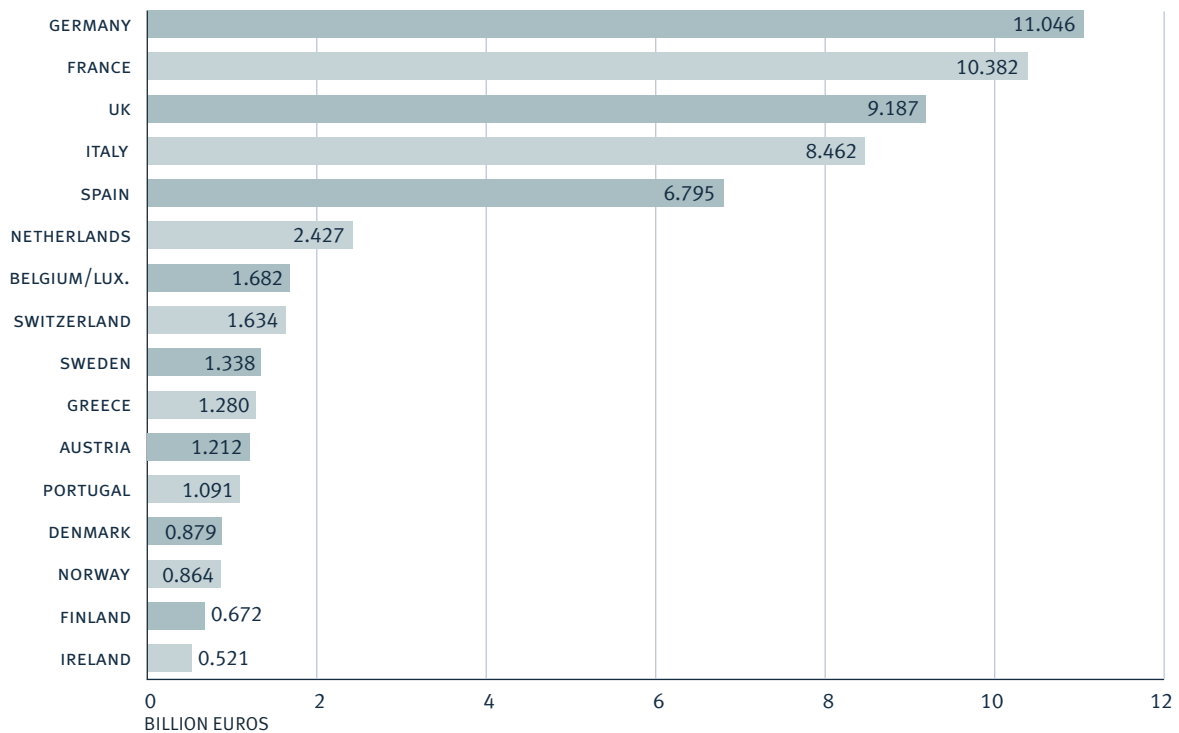
IMPRESSIONS FROM THE HOUSEWARMING AND THE PUBLIC AFFAIRS SEMINAR

EUROPEAN COSMETICS MARKET 2004

WESTERN EUROPEAN C&T MARKET ANNUAL GROWTH 2002-2004 (EUROS AT RSP)



MARKET VOLUME IN EUROS BY COUNTRY RETAIL SALES PRICES (RSP)



The full Colipa market report for 2004 is available from Colipa.
The market report can be ordered by contacting Colipa under colipa@colipa.be.

Source : Colipa Statistics Working Group

ASSOCIATION MEMBERS *

Austria

F.C.I.O. - Fachverband der Chemischen Industrie Österreichs

Belgium & Luxembourg

DETIC - Association Belgo-Luxembourgeoise des producteurs et des distributeurs de savons, cosmétiques, produits d'entretien, d'hygiène et de toilette, colles et produits connexes

Czech Republic

CSZV - Czech Association for Branded Products

Denmark

S.P.T. - Brancheforeningen for Sæbe, Parfume og Teknisk/kemiske artikler

Estonia

E.K.L. - Eesti Keemiatööstuse Liit

Finland

T.Y. - Teknokemian Yhdistys Teknokemiska Föreningen

France

F.I.P. - Fédération des Industries de la Parfumerie

Germany

I.K.W. - Industrieverband Körperpflege- und Waschmittel

Great Britain

C.T.P.A. - Cosmetic, Toiletry & Perfumery Association

Greece

P.S.V.A.K. - The Hellenic Cosmetic, Toiletry and Perfumery Association

Hungary

KOZMOS – Hungarian Cosmetic and Home Care Association

Ireland

I.C.D.A. - Irish Cosmetic, Detergents & Allied Products Association

Italy

UNIPRO - Unione Nazionale delle Industrie di Profumeria, Cosmesi, Saponi da Toilettia e Affini

Latvia

Association of Latvian Chemical and Pharmaceutical Industry

Lithuania

LIKOCHEMA - Lithuanian Cosmetic and Household Chemicals Producers Association

The Netherlands

N.C.V. - Nederlandse Cosmetica Vereniging

Norway

K.L.F. - Kosmetikkleverandorenes Forening

Portugal

A.I.C. - Associação dos Industriais de Cosmética, Perfumaria e Higiene Corporal

Slovakia

Slovak Association for Branded Products

Slovenia

KPC – Association of Cosmetics and Detergents Producers of Slovenia (part of the Association of Chemical Industries)

Spain

STANPA - Asociación Nacional de Perfumería y Cosmética

Sweden

K.T.F. - Kemisk-Tekniska Leverantörförbundet

Switzerland

SKW. - Schweizerischer Kosmetik- und Waschmittelverband

INTERNATIONAL COMPANY MEMBERSHIP *

Avon

Beiersdorf

Bourjois

Chanel

Christian Dior

Colgate Palmolive

Coty

Elizabeth Arden

Estée Lauder

Laboratoires Expanscience

GlaxoSmithKline

Henkel

Johnson & Johnson

Kanebo Cosmetics

Kao Corporation

L'Oréal

Mary Kay

Pierre Fabre

Procter & Gamble

Shiseido

Unilever

Wella

YvesSaintLaurent

ASSOCIATED MEMBERS *

Australia: C.T.F.A.A. - The Cosmetic, Toiletry and Fragrance Association of Australia

Brazil: ABIHPEC (sipatesp) - Associação Brasileira da Indústria de Higiene Pessoal, Perfumaria e Cosméticos

Bulgaria: B.N.A.E.O.P.C. - Bulgarian National Association Essential Oils, Perfumery and Cosmetics

Romania: RUCODEM – Romanian Union of Cosmetics and Detergent Manufacturers

Russia: APCoHM - Association of Perfumery, Cosmetics and Household chemistry Manufacturers P.C.A.R. - Perfumery and Cosmetics Association of Russia

South Africa: C.T.F.A. S/A - The Cosmetic, Toiletry and Fragrance Association of South Africa

Turkey: C.T.I.A. - Cosmetics and Toiletries Industry Association

STRUCTURE OF COLIPA



* For full details see Colipa Website : www.colipa.com

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→ *Member*

Mr Pierre Perrier - Parfums & Cosmétiques LVMH
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Mr Matthijs Tellegen - Estée Lauder
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Cosmétiques LVMH
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→ *Member*

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→ *Member*

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→ *Member*

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Fédération des Industries de la Parfumerie
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→ *Member*

Ms Sarah Griffiths - Estée Lauder
→ *Member*

Ms Karen Guerra - Colgate Palmolive
→ *Member*

Mr Antoine Housset - S.A.S. Chanel
→ *Member*

Ms Debbie Hunter - C.T.P.A. -
Cosmetic, Toiletry & Perfumery Association
→ *Member*

Dr Gerd Ries - JOHNSON & JOHNSON
→ *Member*

Mr Mike Rumsby - L'ORÉAL
→ *Member*

Ms Marjolein Van Oostrum - N.C.V. -
Nederlandse Cosmetica Vereniging
→ *Member*

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→ *Member*

Ms Carola Wacker-Meister - Wella
→ *Member*

Ms Marie-Hélène Weber - Pierre Fabre
→ *Member*

Dr David Wilcox - Colgate Palmolive
→ *Member*

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→ **Issue Manager** : Manuela Coroama

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→ **Project Assistant Public Affairs** : Fadwa Sibai

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→ **Financial Manager** : Nedim Görel

→ **Office Assistant** : Delphine Gilles

NEW PUBLICATIONS



CONSUMER LEAFLET: COSMETIC LABELLING, CHANGES EXPLAINED

The well-being of consumers is the desired outcome of cosmetics use, therefore product safety and performance remain the primary considerations for our industry. In this light, the cosmetics industry has been working hard to provide consumers with information throughout Europe. This leaflet highlights, in brief, a number of important improvements that the industry has introduced: Period After Opening, ingredient information for fragranced products and the website directory of cosmetic companies.



THE EUROPEAN COSMETICS DIRECTIVE - CONSOLIDATED VERSION

This publication contains a consolidated version of Council Directive 76/768/EEC on the approximation of the laws of the Member States relating to cosmetic products.

The frame is one continuing text of recitals, articles and annexes, with each adapted to take into account all changes introduced by the successive amendments to the Cosmetics Directive (including its 7th Amendment) and adaptations to technical progress up to 21 September 2004.



ANALYTICAL METHODS FOR COSMETICS PUBLISHED

Colipa, has published a book on analytical methods for cosmetics products. Research and Development are crucial for product innovation. The improvement of product performance is a core goal, so are the safety and reduction of environmental impact.

The analytical methods compiled in this book will enable the cosmetics industry and control laboratories to further advance accuracy in their analytical work and therefore benefit consumers and producers alike.



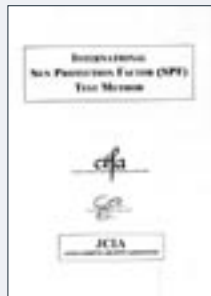
STATISTICS - MARKET REPORT

The annual market report on the European cosmetics industry offers readers comprehensive market data relating to Western Europe (EU15, Norway and Switzerland), full colour graphics and charts. The 2004 report will be published on 19 May 2005.



THE EUROPEAN UNION COSMETICS DIRECTIVE - EXPLANATORY BROCHURE 2004

The requirements of the EU Cosmetics Directive from general product safety through to product quality and claims are all clarified in this brochure. The background, philosophy and legislative process that helped shape its scope and objectives are explained and it provides answers to the most frequently asked questions about EU Cosmetics Regulations.



SPF GUIDELINES PUBLISHED

Colipa (the European Cosmetic, Toiletry and Perfumery Association) has, in collaboration with the JCIA (Japan Cosmetic Industry Association) and CTFA/SA (Cosmetic, Toiletry & Fragrance Association of South Africa), developed this New International Guideline for the Sun Protection Factor Test Method.

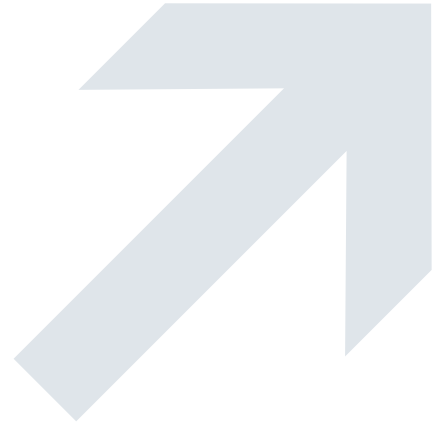
The method described in this guideline is a guide to help experienced technicians to perform the test. Certain procedures are critical to obtain the correct result and these are described in the appendices. The CD-ROM shows the correct procedure for the weighing and application of products.

The Guidelines can be ordered via COLIPA.

PUBLICATIONS LIST



- **Alternatives to Animal Testing, The Facts** (revised & updated version August 1999)
- **Alternatives to Animal Testing**
Proceedings - Colipa International Scientific Conference, 1995
- **Alternatives to Animal Testing II**
Proceedings - Colipa International Scientific Conference, 1999
- **Analytical Methods for Cosmetics Published 2004**
- **CICI, Colipa Database EU Inventory of Cosmetic Ingredients** - 1996 - CD-Rom, Year 2000 compliant
- **Colipa Statistics**
English - Available editions from 1993 to 2003
- **Colipa Statistics**
French - Available editions from 1996 to 2001
- **Cosmetic Good Manufacturing Practices**
Guidelines for the Manufacturer of Cosmetic Products
- **EAPCCT/Colipa Cosmetic Frame Formulations**,
March 2000
- **The European Union Cosmetics Directive - Consolidated version 2004**
- **The European Union Cosmetics Directive - explanatory brochure 2004**
- **EU/CEEC (Trade Central and Eastern European Countries)**
Proceedings from Colipa Colloquium, September 1995
- **Guidelines for Assessment of Skin Tolerance of Potentially Irritant Cosmetic Ingredients**
- **Guidelines for the Evaluation of the Efficacy of Cosmetic Products**
- **Guidelines for Percutaneous Absorption/Penetration**
- **Guidelines for the Safety Assessment of a Cosmetic Product**
- **Guidelines on Ingredient Labelling in the EU**
- **Guidelines on Microbial Quality Management, (MQM)**
- **Guidelines on the Exchange of Information Between Fragrance Suppliers and Cosmetic Manufacturers**
- **Guidelines on International Sun Protection Factor (SPF) Test Method 2003**
- **Product Information: Guidelines Based on the 6th Amendment to the EU Cosmetics Directive**
- **Product Test Guidelines for the Assessment of Human Skin Compatibility**
- **Proceedings, Colipa Information Day**
Available editions 1998 and 2003
- **Proceedings, Colipa General Assembly**
 - **Deauville** 10-13 June 1998
 - **London** 23-26 June 1999
 - **Greece** 27-30 June 2000
 - **Ireland** 3-7 July 2001
 - **Italy** 26-29 June 2002
- **Proceedings, Colipa Congress in Florence, Global Regulatory Harmonization**
22-23 April 1998
- **Proceedings, Colipa Congress in Malta, Towards Global Harmonization of Cosmetic Regulation**
10-13 April 2000
- **Proceedings, Colipa Seminar on Japanese Cosmetic Regulation**



COLIPA IS THE EUROPEAN TRADE ASSOCIATION REPRESENTING THE INTERESTS OF THE COSMETIC, TOILETRY AND PERFUMERY INDUSTRY.

OUR VISION

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

OUR MISSION

To help maintain and develop a sustainable, competitive and respected industry in Europe

- by demonstrating the inherent value of our industry (as stated in our vision)
- by striving to create the most favourable economic and regulatory environment in which to operate
- and by advocating best practices, thereby ensuring that consumers benefit from continuously innovative and safe products.

OUR GOALS

Colipa, as THE recognised voice of the European cosmetics, perfumery and personal care industry, must:

Earn public trust

by fostering transparent and reliable relationships with public authorities and stakeholders, to best communicate the social and economic relevance of our industry in terms of satisfying consumer needs.

Achieve effective public policy

by actively contributing to the shaping of workable and fair policy frameworks regulating the industry. To this end, proactive and effective networking and communication are of the essence. Opportunities for achieving alignment on an international scale should be created and optimised.

Enhance member value

by addressing members' needs in an efficient and transparent way, through timely information and decision making processes and focusing on the issues and activities which are important to them. Best use should be made of members' expertise and dedication to optimise both efficiency and one-voice positions.



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COSMETICS EUROPE IS THE EUROPEAN TRADE
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