



COSMETICS EUROPE:
ACTIVITY REPORT 2008



VALUE & VALUES

IN TODAY'S COSMETICS INDUSTRY

COLIPA ACTIVITY REPORT 2008

WELCOME TO COLIPA'S ACTIVITY REPORT 2008

I AM VERY PLEASED TO PRESENT THE 2008 COLIPA ACTIVITY REPORT. THIS YEAR, WE HAVE CHOSEN AS OUR THEME: VALUE AND VALUES IN TODAY'S COSMETICS INDUSTRY.



Françoise Montenay
President Colipa

In this Annual Report we will look at the beneficial value that our products represent for our consumers, and the values that we, as an industry, stand by. These values are to support the development of an innovative, sustainable, competitive and respected cosmetics industry in Europe, which best serves consumers. The current challenges facing the industry in an uncertain and ever-changing world mean that we, the member Companies and Associations of Colipa, must work even harder together to continue to represent our vibrant industry.

Colipa leads the way in sharing and promoting our industry's values because we want to set standards that meet both industry's freedom to innovate and consumer safety. It is clear that we lead on pro-active issue prevention and management at European Union (EU) and country level. On behalf of the industry in Europe, we speak with one voice.

Our ability to work effectively will be enhanced due to the internal reorganisation of Colipa's committees. The process to put these changes in place has been successful due to the significant efforts of Colipa's members and staff. This restructuring will bring benefits in terms of increased expertise and better

“*Colipa leads the way in sharing and promoting our industry's values because we want to set standards that meet both industry's freedom to innovate and consumer safety*”

Our keynote messages this year are from two very important players for our industry. Like us, Commissioner Kuneva has the interests of European consumers at heart. My thanks go to her for highlighting consumer needs and expectations in her keynote message. Dagmar Roth-Berendt is the German Member of the European Parliament responsible for working on the Parliament's vital contribution to revising the current cosmetics legislation. I would like to thank her for her contribution to our Annual Report and her part in the evolution of our industry. Working together with European decision-makers will continue to be a fundamental part of our work as the European Cosmetics Association.

sharing of specialist knowledge across a wide range of issues of importance to the industry.

My thanks go to our member Companies and Associations, and Colipa's staff, for their vital contribution to the overall achievements of our Association. It is this pro-active and collaborative way of working together which enables us to represent the European cosmetics industry effectively. Our combined efforts will ensure that we continue to provide value and values in today's challenging world.

Françoise Montenay

A YEAR OF CHALLENGES AND OPPORTUNITIES

THE WAY OUR INDUSTRY OPERATES REFLECTS THE CHANGING VALUES IN SOCIETY. WE NOT ONLY PROVIDE GOOD VALUE PRODUCTS TO IMPROVE OUR DAILY LIVES, WE ALSO LISTEN TO CONSUMERS REGARDING THE VALUES THAT THEY EXPECT FROM US.





Bertil Heerink
Director-General Colipa

“ *The revision of European cosmetics legislation will help to meet consumer needs better, whilst ensuring that our industry remains innovative* ”

The values that our industry stands by are to support the development of an innovative, sustainable, competitive and respected cosmetics industry in Europe, which best serves consumers. This must of course be done in a transparent way, taking into account corporate social responsibility.

The last year was an important year for laying the foundations of our new legislative framework. The revision of European cosmetics legislation will help to meet consumer needs better, whilst ensuring that our industry remains innovative.

Ethical values remain high on our agenda. One example of these values is sustainability. This has many aspects that cover the whole life cycle of a cosmetic product, from sustainable sourcing of cosmetic ingredients through to energy used in manufacturing and product packaging.

Colipa has worked hard to set priorities strategically, in order to serve our membership effectively. The structure shown in this Activity Report reflects the organisation in 2008, however the General Assembly put in place the framework for a new structure. Making our structure more agile will enable us to work more efficiently as an organisation.

Looking back over 2008, it is clear that we are on track. This is notably the case in the area of the new European regulatory framework, which will provide a good basis for international convergence. This could not have been achieved without the full support of Colipa's members.

I wish you pleasant reading.

KEYNOTE MESSAGE

COMMISSIONER MEGLENA KUNEVA

COSMETICS ARE SPECIAL – EVERYBODY NEEDS THEM,
AND USES THEM EVERY DAY.



Meglena Kuneva
European Union Commissioner for Consumer Affairs

They help us clean our body and keep it in a healthy state, they can protect us against possible adverse effects from our environment, such as too much sun, and they can improve the way we look and thus make our lives more pleasant. There is no doubt that cosmetics must be safe, according to our best and most up-to-date knowledge.

I have seen considerable efforts from the cosmetics industry to comply with the high expectation of safety that is demanded of their products, and I trust that they will continue to do so in the future. This implies striving constantly for the most recent scientific knowledge about cosmetics and their ingredients, be it new ingredients that care even more for the complex systems that make up our skin and hair, or about their toxicological properties and how to determine them in the most appropriate way, and in particular about their risk or safety.

The well-established practice of requesting an opinion from the Commission's relevant Scientific Committees on the safety of specific cosmetic ingredients has so far ensured appropriate updates of the cosmetics legislation, including the establishment of limitations for the use of certain compounds. This is a practicable and proven way to ensure safety.

With ongoing scientific and technological progress, new materials are being developed that can provide considerable benefits, but which may also cause safety concerns that have to be addressed. In this regard, nano materials in cosmetics are a particular challenge since they require case-by-case assessments before conclusions can be drawn about their safe use. I am pleased to see that the cosmetics industry has responded to the Scientific Committee's request for more data on nano titanium dioxide and

nano zinc oxide, and I am convinced that this exercise will provide us with in-depth insight into how to ensure safety for these two nano materials. I hope and expect that the cosmetics industry will take this as a signpost when embarking on the use of other nano materials, and that they will share their approach with other industries wishing to use nano materials in consumer products. Because one thing is clear: there cannot be a compromise on safety.

Another major challenge I see is the replacement of animal testing of cosmetic ingredients. Although considerable progress has been achieved for certain toxicity endpoints such as sensitisation and irritation, the outlook for others, including cancer or reproductive toxicity, looks like remaining static for several years to come. I therefore hope that more efforts will be invested in this area, including from the cosmetics industry, in order to accelerate the development of new scientific concepts and techniques such as Quantitative Structure-Activity Relationships (QSARs), in order to comply with the given deadlines in 2009 and 2013.

Finally, the new Cosmetics Regulation will provide a consolidated and more explicit framework for all actors in the cosmetics area, for surveillance authorities, manufacturers and importers. In particular the requirements for the safety evaluation of a cosmetic product have been substantially clarified. I consider the new Regulation to be a further step by the European Union towards more transparency in the rules and in the roles that everybody has to play, and I trust that it will help the cosmetics industry to carry out their work and duties thoroughly and with circumspection, and to be prepared for the challenges of the future.

KEYNOTE MESSAGE

DAGMAR ROTH-BEHRENDT MEP

THIS ANNUAL REPORT COVERS A PERIOD THAT HAS SEEN SOME VERY IMPORTANT DEVELOPMENTS IN THE REGULATORY ENVIRONMENT IN WHICH THE COSMETICS INDUSTRY OPERATES.



Dagmar Roth-Behrendt
Member of the European Parliament

For 20 years I have been actively involved in shaping European cosmetics legislation as a member of the European Parliament's Committee on Environment, Food Safety and Public Health, which is responsible for this issue.

As the rapporteur on the 6th and 7th Amendments to the Cosmetics Directive and on the recently adopted Recast of the Cosmetics Directive, I was deeply committed together with the involved stakeholders to shaping the legislation which now, is becoming a reality.

The single revised piece of legislation has streamlined and modernised legislation which had been made up of many revisions over the years. The legislation will take the form of a Regulation, making it directly applicable in all the EU member states. The new text maintains a clear legal scope and provides definition of roles and responsibilities. As part of the simplification of administrative procedures, the text includes for the first time a single EU-wide register for cosmetic products (the notification process) and increases the cooperation between market surveillance authorities. The new legislation will also require industry to provide information on the use and safety of nano materials in cosmetic products. The European Parliament supports all efforts to increase consumer information and therefore supported the mandatory labelling of nano materials in cosmetic products. As for the carcinogenic, mutagenic and reprotoxic substances

(CMRs), I very much welcome the complete ban of these substances. The exceptional authorisation of some CMR substances shall only be allowed under very strict conditions and only for those substances that are also allowed for use in food.

I am glad that since 2004, the 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 and applicable.

What are my expectations as a Member of the European Parliament on future cooperation with the cosmetics industry and the challenges we are facing? After the discussions on the 7th Amendment, a time when industry lacked a transparent and cooperative approach, I now notice a considerable improvement in working relations and feel that we have established a better level of trust. When it comes to the question of developing alternatives to tests on animals, I appreciate the clear commitment of industry – including capital investment made to progress on finding alternatives to animal testing. Still, I want to urge all stakeholders to continue working on the development of alternative test methods and to further enhance their commitment.

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

“ *The single revised piece of legislation has streamlined and modernised legislation which had been made up of many revisions over the years* ”

VALUE AND VALUES IN TODAY'S COSMETICS INDUSTRY

TODAY IS CHALLENGING. IN TIMES OF DOUBT, WE SEEK REASSURANCE. TAKING CARE OF OURSELVES, INSIDE AND OUT, CAN HELP US FACE TODAY'S CHALLENGES WITH CONFIDENCE.





“ Europe’s cosmetics industry, offering thousands of different products, contributes significantly to the happiness of Europe’s citizens ”

When we look good, we feel good and with confidence we stand a better chance of making a success of our lives.

The cosmetics industry is helping people of all shapes and sizes, of all ages and creeds to face the future by taking care of themselves today.

Providing Feelings of Well-Being

- using shampoo and deodorant because we want to stay fresh
- using make up, hair colour or fragrance to enhance our self-confidence

Protecting from Extreme Weather Impacts

- using sunscreen and other measures to protect our skins from the damaging effects of strong sunlight
- using moisturiser and conditioner to protect our skin and hair against the elements

Supporting Good Hygiene Practices

- encouraging hand washing to help prevent the spread of germs
- following good oral care to help protect gums and teeth from acid erosion and decay

Contributing to Quality of Life

Today’s cosmetics industry provides a valuable service to Europe’s citizens, enhancing feelings of well-being, protecting against skin damage and helping ensure good hygiene – all contributing to a better quality of life.

As societies increasingly define development in terms of people’s happiness, so products that make people feel better will become ever more recognised for the contribution they make to society’s collective well-being.

Europe’s cosmetics industry, offering thousands of different products, contributes significantly to the happiness of Europe’s citizens as they go about their daily lives. Meeting the various and very personal needs of millions of consumers on a daily basis, the European cosmetics industry makes a significant and unique contribution to the confidence and self-esteem of Europe’s citizens.

Sustainability

Understanding and awareness-raising by the cosmetics industry of the importance of sustainable development has increased considerably in recent years. As knowledge increases on the challenges, so work intensifies on identifying the best, viable and durable solutions, taking into account the whole product life cycle.



The challenges include:

- Climate change – reducing carbon emissions from manufacture and transport
- Resource use – developing resource efficient product life cycles
- Natural resources – respecting the scarcity of natural resources
- Biodiversity – reducing bio-damage by using biodegradable inputs
- Health – bringing positive benefits to people's well-being
- Social inclusion – making sure all consumers can enjoy these benefits
- Global poverty – creating positive livelihood opportunities in the global South
- Governance – doing business with full transparency and public accountability

Transparency

The European cosmetics industry has a tradition of openness with consumers through, for example, ingredients listings. We work closely with stakeholders, including EU policy makers, sharing ideas and learning together how best to improve sustainability. With all our partners in Europe – governments and civil society, suppliers and retailers, charities, schools and hospitals, regulators and consumers – the cosmetics industry is open. We listen. We learn. We improve how we do business.

The ban on animal testing that becomes law in all EU member states in March 2009 is a step forward for the cosmetics industry that will establish a level playing field for all operators, stimulate innovation and boost consumer confidence. Alternative testing technology has enabled this change. Clean technology will help speed other necessary changes. And however quickly progress is made, Colipa will make sure all stakeholders are kept up to date.

Thanks to the new EU law called REACH (Regulation, Evaluation, Authorisation and Restriction of Chemicals), there is now a comprehensive framework for all chemical ingredients used in consumer products, including oils, plants and plant extracts used in cosmetic products. Implementation of the REACH law will also stimulate innovation. An increased use of natural ingredients will not in any way compromise the safety of cosmetic products nor their effectiveness.

Empowerment

Vital to the continued success of the European cosmetics industry is a deep understanding and respect for the diverse needs, choices, traditions and lifestyles of our customers. Empowering women to take control of their lives by using cosmetic products as a confidence booster has long been at the heart of our business. Our industry celebrates women and men, young and old, rich and poor ensuring that their needs and aspirations



are used by people every day to clean their teeth, wash and protect their skin and hair and enhance their natural features with exciting colour, tone and fragrance; each in their own unique and very personal way, looking good and feeling great!

Today's customers are sophisticated and discerning. And whatever our customers choose, our members will provide – within the constraints of ecological and cultural integrity. Around the world people grow crops and harvest oils that may one day become tried and tested ingredients for the cosmetics industry. Whether ingredients are sourced locally or globally our industry works in accordance with principles

A Future of Integrity

People need to take care of themselves and use cosmetics products to help. Especially in times of hardship or illness people want to look good and feel good.

Today's cosmetics industry serves those driven by a desire to set trends and try new products as well as those drawn to more traditional ones. The creative talent of the industry's workforce means that those apparently contradictory needs are met in an explosion of innovation and a vast array of useful products, all tested to the highest standards for safety and efficacy.

“ *Vital to the continued success of the European cosmetics industry is respect for the diverse needs, choices, traditions and lifestyles of our customers* ”

of fair trade and respect for the cultural integrity of workers, their families and communities.

Our products will one day serve all world communities, helping improve basic hygiene, helping protect skin against weather extremes and helping in a small way to bring dignity to women and men everywhere.

Our commitment is to continue to deliver what people want – better hygiene, better protection and a better quality of life. We also commit to more sustainability in the way we do business and more empowerment to consumers and communities. The European cosmetics industry will continue to be open to listen and to learn – building a future of integrity and success.

CHAIN PRO-ACTION

IT SOUNDS SO SIMPLE. YOU GATHER RAW MATERIALS FOR YOUR PRODUCTS. YOU PROCESS THEM INTO BRANDS. YOU PACK AND TRANSPORT THE GOODS TO RETAILERS OR DESPATCH DIRECT TO CONSUMERS.

Supply chain management. Nothing to it, you think at first. Then you learn most hair gels have around 13 ingredients; eau de toilette, 17; face wash, 24; shampoo, 33; a body wash, 37. The story starts to reveal complications.

Each ingredient must have a source, possibly several, across many countries. Is that supply safe, sustainable and reliable? How will it be transported – truck or train, air or sea? What fuel is used? How will each ingredient, and then each finished product, be stored – ambient temperature, cold store, heated or refrigerated? Does the product remain safe and stable throughout its lifespan? Will it perform well in the product when combined with other substances?

In addition to hundreds of questions, there are yet more demands. Supply chain management in the European cosmetics industry must ensure suppliers share the same ethical standards regarding their employees, health and safety, environmental protection, packaging and waste management.

And don't forget another vital factor. For consumers to continue enjoying competitive value-for-money prices, these challenges must also be achieved at a sustainable cost.

If humans were not humans and did not have that inbuilt desire to develop, it could be argued manufacturers of cosmetics, toiletries and perfumes could use the same formulae as the ancient Egyptians, Greeks and Romans. But the human instinct is to make progress, try something different, be adventurous and make life easier and better. Our highly competitive cosmetics industry demonstrates that trait.

Innovation is an industry instinct. So the search for new ingredients for creams and cleansing, shampoo, hair care and cosmetics continues unabated. As individuals – and as an industry – we still seek new perfume to stimulate the senses, new ingredients that improve what we already enjoy.

In today's world where corporate social responsibility is so important, the exploration and desire for innovative products produced in a responsible way has provided impetus to the industry.

Companies are learning that operating in this responsible and sensible way brings hard business benefits. The quest to run companies in a more sustainable way is fuelling innovation pipelines, delivering cost savings and helping win retail customers who have sustainability programmes of their own and who want to work in harmony with the cosmetics industry. All the links in the chain are pulling together.

Sustainable supply change management also delivers benefits for a growing number of consumers who want to be reassured that companies from whom they are buying their products are sourcing, manufacturing and marketing them in a responsible and ethical fashion.

Any fears the current economic downturn will stop or reduce a responsible company's search for a safe and sustainable supply chain can be put to one side.

It is during these uncertain economic times that core values and commitment to sustainability will remain unchanged. Indeed, now more than ever, this agenda holds the potential for the long-term and sustainable success of businesses and brands.



The economic downturn is precisely the right time to ensure efficiency and sustainability through the supply chain.

That view is endorsed across Colipa's membership. The cosmetics industry is not a "here today gone tomorrow" business. It has a long history and invests towards a sustainable future.

Along the supply chain, from beginning to end, safety assessment of ingredients is an essential link. The health and welfare of consumers and employees is the single highest priority for all responsible companies, especially with cosmetics and toiletries where products are in regular and constant bodily contact.

Supply chain management sounds – to the uninitiated – a dry and dull topic. But it stimulates the skills, expertise and organisation to achieve what all responsible citizens now seek: safe, sustainable and effective products at the right price for the purse and at minimum or no cost to the environment.

The most widely accepted definition of "sustainability" is that used by the United Nations Department of Economic and Social Affairs: "Development that meets the needs of the present without compromising the ability of future generations to meet their own needs."

From start to finish through the supply chain, Colipa's members aim to discover, develop and distribute value-for-money products in a safe and sustainable way, for both individuals and the planet.

Consumers and customers have increasingly demanded products to be produced responsibly. The cosmetics industry has not only responded but has often spearheaded and contributed towards "the green revolution". Not only because it is the right thing to do for our children and our children's children, but because it makes good business as well as moral sense.

Supply chain managers within the cosmetics industry are in a privileged position to help their companies achieve safe, sustainable and responsibly manufactured products from first source to last use.

They can discover and develop the best materials from responsible suppliers, improve working conditions, reduce packaging and determine fuel-efficient transport. They can demand suppliers improve the way they work with their own people, products and procedures. In short, they can improve their company, its reputation, and help reduce costs to benefit consumers and society.

The European cosmetics industry has taken up the challenge of meeting today's needs with tomorrow's future and is seeking innovative and creative solutions that both protect and promote the use of our planet's resources in a sustainable manner.

“The economic downturn is precisely the right time to ensure efficiency and sustainability through the supply chain”

PROGRAMME COMMITTEE REPORTS



PRODUCT MANAGEMENT

ACTIVITY REPORT FROM THE PROGRAMME COMMITTEE

PRODUCT MANAGEMENT



Randy Stolt

Chairman Programme Committee Product Management

Review of European Cosmetics Legislation

The work of the Programme Committee Product Management (PCPM) focussed on the European Commission's initiative to review European cosmetics legislation.

With the help of its expert working groups, PCPM contributed to Colipa's input to the stakeholder discussions through the development of sound technical assessments and solutions on many of the key aspects.

Colipa supported this legislative process from the beginning as an opportunity to strengthen the key principles of our legislation and to contribute to the high level of consumer confidence in the safety of cosmetic products. Good implementation of the reviewed legislation will secure the industry's competitiveness and capacity to innovate whilst guaranteeing the highest level of consumer safety.

Industry Guidelines

Industry guidelines remain an important tool for the industry, providing useful information on the practical interpretation and application of legal requirements. Colipa guidelines are considered to be of a high professional standard and are often used by industry and regulators alike. Experience with the 6th and 7th Amendment to the Cosmetics Directive showed that it is extremely beneficial for industry to prepare revised draft guidance documents to be ready when the new cosmetics Regulation is adopted. The review of European cosmetics legislation, leading to a Recast as a Regulation, will necessitate significant updating of existing Colipa guidelines, for example on safety assessment, product information, undesirable effects or efficacy. Work on this has already been ongoing in parallel to the Recast discussions.

Ingredient Issue Management

A number of ingredient issues were raised at the European Commission's Ad Hoc Working Party on Cosmetic Products. Safety dossiers were requested for instance on Titanium Dioxide, Zinc Oxide and Formaldehyde. Final submissions were provided by Colipa to the European Commission on important ingredients such as Dihydroxyacetone, benzophenone-3 and a number of hair dye ingredients (in a continuation of safety submissions under the European Commission Hair Dye Strategy). The preparation and follow-up to these meetings remained a key activity for PCPM and enabled Colipa to provide strong and competent input.

In 2008, the European Commission also concluded its debate on the future of scientific advice in the European Union. Colipa continued to positively contribute to this debate and supported a working relationship between the industry and the European Commission scientific committees that is more open, transparent and allows for discussion on the scientific issues being considered.

Industry's initiative for improved ingredient issue management and the European Commission's vision of a more open and transparent scientific review process started to show positive effects. There is recognition of increased quality of Colipa dossiers, a more transparent review process and balanced, factual public communications being released by the European Commission on these reviews.

Sun Protection

The European Commission's "Recommendation on the efficacy of sunscreen products and the claims made relating thereto" was largely implemented in the course of 2008 across the whole of our industry. In order to contribute to the smooth implementation of the Recommendation, Colipa organised several meetings and training workshops on specific aspects of the Recommendation for member companies as well as testing laboratories.



The Recommendation provides consumers with more clarity on:

- the minimum efficacy standard for sunscreen products in order to ensure a high level of protection of public health
- claims which should not be made in relation to sunscreen products
- precautions to be observed including application instructions
- simple, understandable labelling to assist in choosing the appropriate product

Although the Recommendation is not binding, it allows sunscreens that comply to benefit from a presumption of being adequately labelled and providing sufficient consumer protection.

Test methods for the measurement of sun protection (UVA and UVB) are a key component of the EU Recommendation, but are also subject to international standardisation discussions at the level of the International Organization for Standardization (ISO). Colipa continued to play an active role in these discussions, aiming to secure maximum compatibility of the international standards with the methods accepted in the EU.

Implementation of the Revised Chemicals Legislation (REACH – Regulation, Evaluation, Authorisation and Restriction of Chemicals)

The revised EU chemicals legislation “REACH”, impacts Colipa members through the consequences on their ingredient supply chain as well as through new legal obligations arising directly from companies’ status as downstream users of chemicals.

Significant activities have been undertaken by Colipa to help its members to understand and implement this complex and expansive legislation, whilst at the same time already preparing our industry’s input into the necessary amendments and corrections of the legal text. Implementation of the REACH Regulation is in full progress. With the pre-registration phase completed in 2008, our industry now needs to get ready for

the registration of substances manufactured or imported in quantities exceeding 1 tonne per legal entity. According to their way of operation, Cosmetics manufacturers may find themselves in a position as downstream users, importers or manufacturers of substances.

Several topics have been particularly prominent in the context of Colipa’s REACH-related implementation activities:

- continued collaboration of downstream user industry sectors on common-interest interpretation and implementation issues
- maintenance of easy-access information tools for members
- development of an approach for the (pre)registration of Natural and Complex Substances (NCS)
- setting up of a process to manage the impact of the authorisation requirement of certain “substances of very high concern”
- harmonised Colipa approach for the cosmetic companies input into suppliers’ Environmental Exposure Scenarios

Natural/Organic Cosmetics

In 2008, Colipa carried out an assessment of the existing labelling and certification schemes in Europe, which clearly identified a lack of harmonised technical, science-based criteria in this area. PCPM set up a Project Team with the mission of developing scientifically sound technical definitions and criteria linked to natural and organic ingredients and finished products. It is, however, not the objective to address the translation of the underlying criteria to on-pack labelling.

Work started at the end of 2008 in collaboration with supplier organisations and existing initiatives in the field. Colipa is providing a platform where different stakeholders can exchange their experiences and we hope to create an international incentive to some common understanding on basic technical definitions and criteria in the field of natural and organic products. Ultimately, this will be of significant benefit for consumers and safeguard against misleading claims.

RESEARCH

ACTIVITY REPORT FROM THE PROGRAMME COMMITTEE RESEARCH

COLIPA'S RESEARCH ACTIVITIES IN 2008 ARE A TESTIMONY TO OUR INDUSTRY'S COMMITMENT TO ALTERNATIVE APPROACHES TO ANIMAL TESTING.



Odile De Silva
Chair Programme Committee Research

Joint research activities in this area go back as far as 1992 when the initiative was taken to pool companies' resources to support the development, validation and acceptance of alternative approaches. This work has become ever more important in order to replace animal use for the safety evaluation of human health effects in the context of the strict requirements introduced by the 7th Amendment to the Cosmetics Directive in 2003. Important deadlines linked to testing and marketing bans, related to animal tests, will enter into force in 2009 and 2013.

Colipa supports a large scale research programme that incorporates three core activities: 1) method development/optimisation of existing models to validation 2) research projects that are conducted in collaboration with academia and 3) collaborative activities with external partners.

Eye Irritation

The current Colipa research programme in Eye Irritation aims to identify new *in vitro* endpoints capable of predicting the response of the human eye to chemical injury through understanding mechanisms of eye injury/recovery. The aim is to develop new or improved *in vitro* methods that become formally validated and accepted as regulatory safety tests. A key project on method development/optimisation has focused on Reconstructed Human Tissue assays using the MatTek EpiOcular™ and SkinEthic HCE™ human corneal models. Working with the model producers, we developed extensive datasets and completed the Test Submission Templates required by the European Centre for the Validation of Alternative Methods (ECVAM) to proceed to formal validation in 2009. In addition we are working with ECVAM to support a retrospective statistical analysis of current *in vitro* methods. The knowledge gained from all of these activities will be used to assess the relevance and reliability of batteries of *in vitro*

assays that could evaluate eye irritation across the range of irritancy for different chemical classes.

Genotoxicity/Mutagenicity

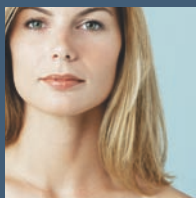
The Colipa Genotoxicity Project Team is working together with external partners, including academia and ECVAM to develop new *in vitro* assays with higher predictive capacity and relevance to human exposure. The Genotoxicity Project Team is steering a research programme to identify key causes for the differences observed between current *in vitro* tests and the *in vivo* response and to propose significant improvements. The most relevant route of exposure to cosmetics is via the skin. Therefore, one focus of the Genotoxicity Project Team is to develop genotoxicity assays based on 3D human skin models. The knowledge gained by this programme will be used to generate non-animal tests that have higher predictive value for human exposure.

Skin Allergy (2013)

The current Colipa research programme on Skin Allergy aims to strengthen our understanding of how chemicals react with the skin and sometimes cause skin allergies.

Colipa funds a programme that incorporates four core activities: 1) investigating how chemicals penetrate and distribute within skin using a computer-based modelling approach 2) binding to proteins by chemical sensitizers 3) understanding how chemicals are altered by metabolic pathways in the skin and/or binding to skin protein 4) understanding how immune cells are activated.

Another project derived from the knowledge gained through this programme will consist of integrating the different assays into a test battery, capable of predicting the potential risk to human health. In addition, Colipa continues to collaborate as a partner in the 6th European Framework Project Sens-it-iv.



Systemic Toxicity (2013)

This is a recently established project team within Colipa that looks at possible research areas which could lead to the development of alternative approaches to replace the need for animal testing in the area of repeat dose systemic toxicity. Non-animal systemic toxicity safety assessment represents an enormous scientific challenge. In order to make a difference in this area, Colipa has entered into collaborative research with the European Commission. This collaboration has a budget of 50 million EUR, co-funded by both partners, and seeks to fund large-scale research projects to help further the science that will ultimately make non-animal safety assessments for systemic effects a reality.

Safety Assessment Using Alternatives

In 2007 and 2008, Colipa organised a series of workshops to evaluate how safety assessment for toxicological endpoints covered by the 2009 deadline (acute toxicity, skin and eye irritation and genetic toxicity) could be addressed by alternative approaches to animal testing. *In vitro* and *in silico* methods were considered as well as testing strategies developed by Colipa teams, or with partners such as ECVAM and The European Partnership for Alternative Approaches to Animal Testing (EPAA), or by others outside Colipa. Gaps were identified in existing methods for each endpoint to provide guidance to the alternative testing programmes led or co-led by Colipa. Tiered approaches to the use of alternative methods were designed. This work will be available through peer-reviewed scientific publications.

Additional Research Work

Beyond the strong focus on alternative methods development, Colipa finalised its follow-up studies on consumer exposure to cosmetic products. Results will be published in the course of 2009 in peer reviewed articles. In the area of analytical methods and microbiology, Colipa's collaboration at the International Organization for Standardization (ISO) is ongoing, to further harmonise industry practice on the basis of high quality science. Also, Colipa's toxicology advisory group continued its work on adapting and promoting the use of cutting edge safety assessment methodologies in our sector.

COMMUNICATIONS AND PUBLIC AFFAIRS

ACTIVITY REPORT FROM THE PROGRAMME COMMITTEE COMMUNICATIONS

THIS YEAR HAS SEEN THE BEGINNING OF THE IMPLEMENTATION PHASE FOR LONG-TERM STRATEGIC COMMUNICATIONS PROJECTS, AS DEFINED BY OUR COMMUNICATIONS STRATEGY.



Charles Laroche
Chairman Programme Committee Communications

Close collaboration between members has produced effective communications tools. These tools will enable us as an industry to communicate with a single voice directly with key stakeholders on issues of primary importance to all parties.

The new Colipa website was launched in the autumn of 2008: www.colipa.eu. Reaching out to all our stakeholders via this transparent and dynamic communications tool is an essential part of our communications strategy. The site aims to give clear and accurate information to a wide range of audiences about our industry's mission, commitment and results achieved. Citizens, consumers, decision-makers and key opinion formers are all able to access key up-to-date information about the European cosmetics industry. The website will continuously be improved, and it will therefore act as a key point of reference for stakeholders. In turn, this will further strengthen our reputation as a trusted and competent voice representing the industry.

The importance of innovation to the cosmetics industry was discussed at a panel debate which took place in Brussels in October. A wide audience attended the event where representatives of the

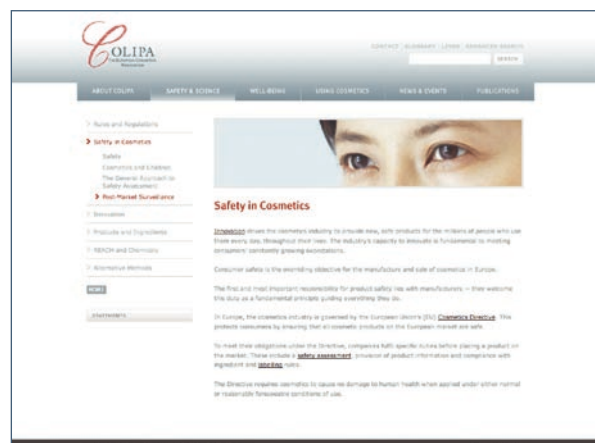
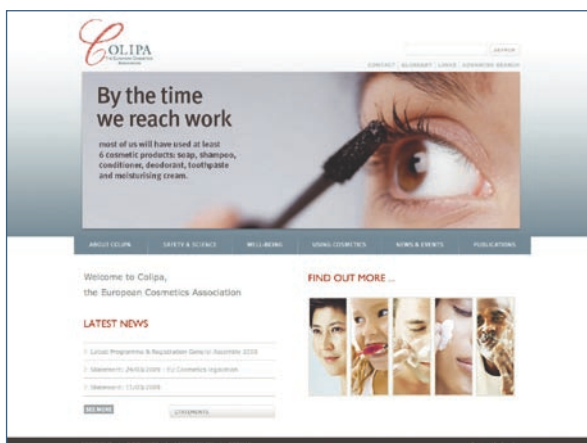
European Commission, consumers and the industry spoke. Topics covered included the benefits of innovation in cosmetics for consumers.

Public Affairs

The review of European legislation in the field of cosmetics has been a major focus of our public affairs activities over the past year. Thanks to the one voice approach and the work with key stakeholders achieved via the national associations, the position of the cosmetics industry has contributed to an effective and workable final proposal. This work facilitated an agreement after just one reading in the EU decision-making process.

Priorities for the Future

We will continue to communicate openly and proactively in order to build trust in our industry and consumer confidence in our products. This will ensure that all our stakeholders have a clear understanding of our commitment to important issues, such as the benefits of innovation in the cosmetics industry and the progress in research into alternatives to animal testing. Relationship-building with the new Commissioners and Members of the European Parliament will be a key element of work during the coming year.



INTERNATIONAL COOPERATION

ACTIVITY REPORT FROM THE PROGRAMME COMMITTEE

INTERNATIONAL COOPERATION

IN 2008, COLIPA'S INTERNATIONAL ACTIVITY WAS ORGANISED INTO THREE AREAS.



Stefano Dorato

Chairman Programme Committee International Cooperation

These are the explanatory work on the current and upcoming European regulatory framework, the international efforts on cosmetics regulation convergence, and increased cooperation with the European Commission's Directorate-General for Trade in the definition of a market access strategy.

Communicating on the European Regulatory Framework Abroad

Explaining the European regulatory cosmetics framework to the wider world is at the core of Colipa's international activity. Various countries and regions have taken on, either partially or totally, the European Union (EU) Cosmetics Directive 76/768/EEC as a reference when drafting their own cosmetics regulations. As regards the European animal testing ban, in the perspective of the entry into force of the animal testing ban in 2009, a regular flow of information and regulatory dialogue was secured with key countries such as Russia, Israel and China.

Colipa participated in joint industry and authorities efforts to communicate on the European regulatory framework abroad. In particular, in 2008 Colipa continued monitoring the implementation of the EU cosmetics legislation in the new European Member States. TAIEX (Technical Assistance and Information Exchange) seminars and similar events on EU cosmetics legislation took place in Sofia (Bulgaria), Bucharest (Romania) and Zagreb (Croatia).

Colipa paid special attention to explaining the background and scope of the review of the European cosmetics legislation.

Moving Ahead Towards International Convergence

The second meeting on International Cooperation on Cosmetics Regulations took place in 2008 in Washington. This process is an informal regulatory cooperation forum between the cosmetics regulatory authorities of Canada, the EU, Japan

and the United States. It was fed into by industry support consolidated in the framework of the Joint Dialogue partners (Colipa and industry associations of the above-mentioned countries). It is hoped that this process will allow for continued discussions on cooperation on important topics for the cosmetics industry, such as alternatives to animal testing, cosmetics labelling and ingredient and product safety.

On the multilateral level, Colipa also continued its coordination work with regard to ISO (International Organization for Standardization) developments in the field of cosmetics.

Efforts and strategic thinking on how to cope with international convergence will be maintained in 2009.

Enhancing Access to Foreign Markets

In 2008, opportunities to work more closely with the European Commission in the framework of its new Market Access Strategy were assessed. In cooperation with the local cosmetics industry associations in non-EU countries, Colipa has maintained a high level of involvement in links with the European Commission's Directorate-General for Trade (DG TRADE) and the Directorate-General for Enterprise and Industry (DG ENTR) on technical cooperation with third countries.

Particular attention was paid to the regulatory developments in countries and regions such as China, ASEAN (Association of Southeast Asian Nations) and Latin America. 2008 was also a key year in the conclusion of discussions about Shared Agreed Objectives with Korea and in finalising the EU-Korea Free Trade Agreement. Colipa also met in Brussels and during the annual General Assembly in Lucerne (Switzerland) with delegations of the competent authorities of various countries and with representatives of third countries' industries.

LEGAL AFFAIRS

ACTIVITY REPORT FROM THE PROGRAMME COMMITTEE LAW AND COMPETITIVENESS



Eberhard Von Klinggräff
Chairman Programme Committee Legal Affairs

Monitoring of the European Regulatory Framework

During 2008, the Programme Committee Law & Competitiveness provided legal advice on key aspects of the EU cosmetics regulatory framework. The proper implementation of the European cosmetics Directive stays under Colipa's constant scrutiny, and cooperation efforts with the European Commission are at the core of Colipa's activity.

In this regard, one major challenge faced by our industry is the entry into force of the animal testing ban on 11 March 2009. Colipa is monitoring the possible implementation issues related to the legal interpretation of the ban.

Colipa Competition Compliance Guidelines

Compliance with competition law is a prerequisite for any activity conducted under Colipa's name. In order to ensure continued adequacy of its own behaviour rules with a constantly evolving field of activity, Colipa has updated its Competition Compliance Programme and developed a series of training sessions for members and staff.

Revision of the Block Exemption Regulation 2790/1999

Since 1999, the current Block Exemption Regulation and the Vertical Guidelines have functioned effectively and adequately addressed the needs of manufacturers, retailers and consumers, although some aspects could be improved and clarified. The current regime allows a variety and a great number of cosmetics suppliers to offer a wide choice of innovative and high quality goods of various types to European consumers.

In advance of the revision of the Block Exemption Regulation in 2009-2010, Colipa started gathering industry efforts on this topic and contributed to discussions such as the public consultation launched by the European Commission's Directorate-General for Competition on Online Commerce opportunities.

Recast of the Cosmetics Directive

From the outset, Colipa welcomed the initiative of the European Commission to simplify the Cosmetics Directive in the framework of the European Commission's efforts to simplify the EU regulatory environment.

In the 30 years since the Cosmetics Directive first came into force, it has had 7 legislative amendments and 40 Adaptations to Technical Progress (ATP). Colipa therefore fully agreed with the European Commission that there was ample room for simplification and clarification of the EU regulatory requirements applicable to cosmetics.

Colipa collaborated with stakeholders at every stage of the decision making process, defending the idea that the main pillars of the Cosmetics Directive should remain valid regulatory concepts for cosmetic products, namely:

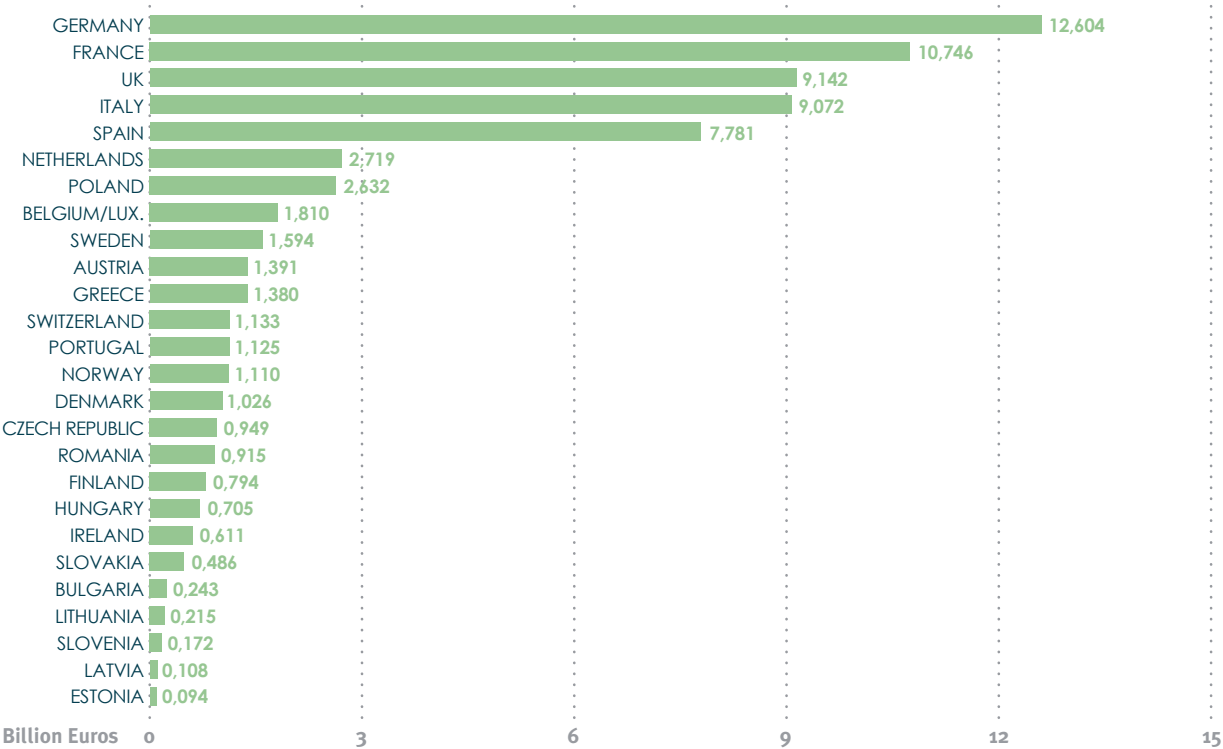
- system of in-market control by EU Member States, as opposed to pre-market approval
- the responsibility of the person placing a cosmetic product on the EU market for compliance
- system of regulation of specific substances by ingredient lists

Discussions point to a successful conclusion in 2009, that will result in a workable and solid Cosmetics Regulation.

EUROPEAN COSMETICS MARKET 2008



Market Volume in Euros by Country (RSP*)



NB: Conversion from national currency to euros has caused a distortion to actual market growth for the UK (actual growth rate in national currency + 3.1% in 2008)

Sources: Colipa Association members and Euromonitor

* Retail Sales Prices

EVENTS 2008



Colipa General Assembly 2008

Colipa General Assembly 2008

The 2008 General Assembly of the European cosmetics Association was held on 16 May in Lucerne, Switzerland.

Innovation is a driver of our industry. It is for this reason that Colipa chose innovation as the theme for the 2008 General Assembly. The programme gave different perspectives on this issue as well as offering an insight into many aspects of our industry and the work of Colipa.

The theme of innovation was presented from various viewpoints. Colipa was pleased to welcome Ms Françoise Le Bail, Deputy Director-General for DG Enterprise at the European Commission, who talked about innovation and sustainability. The participants also heard about innovation in the industry with regard to creating trust in brands, innovation and fragrances and how to communicate innovations. On the occasion of the Gala Dinner, we were pleased to welcome Dr Thomas Zeltner, Director-General of the Swiss Federal Office of Public Health.

The Scientific Forum focused on priority areas both at the European level and internationally. The Forum covered scientific and research issues as well as looking at technical regulatory issues.



Scientific Forum





Colipa debate on Innovation in Cosmetics

Colipa Debate on Innovation in Cosmetics

“Innovation in Cosmetics: Beneficial Science or Marketing Tool”. This was the subject of a Colipa panel debate held in Brussels on 7 October 2008. A panel of experts included Barbara Mentré from DG Enterprise at the European Commission and Jim Murray, the President of the Transatlantic Consumer Dialogue. Industry scientists took part in the panel and discussed the issues with an audience of interested stakeholders.

Joint Dialogue

International counterparts met on 16 May 2008 during the General Assembly in Lucerne. Participants came from the United States, Canada and Japan. Issues of importance to the cosmetics industry globally were discussed.



Joint Dialogue



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*Mentor on behalf of the Board of Directors

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Ms Catherine Bramaud – FEBEA – Fédération
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et de toilette, colles et produits connexes

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Ms Melinda Friend – Colgate-Palmolive
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Ms Barbara Hery – Chanel SAS
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Körperpflege- und Waschmittel
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Dr Kenneth Marenus – Estée Lauder Companies
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Cosmétique
Mr David Van Passel – Johnson & Johnson
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Dr Eric Perrier* – LVMH
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Dr Kenneth Marenus – Estée Lauder Companies
Dr Mathias Rietzel-Röhrdanz – Johnson &
Johnson
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Dr Ronald Van Welie – N.C.V. – Nederlandse
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Products Council
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Ms Francine Käch – L'Oréal
Dr Marie Kennedy – Elizabeth Arden
Dr Linda Loretz – PCPC – Personal Care

*Mentor on behalf of the Board of directors

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Ms Susan Wemyss – Estée Lauder Companies

STAFF

ORGANISATION CHART



STAFF



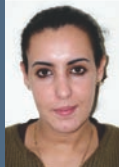
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Chair of CCC Scientific
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Recast

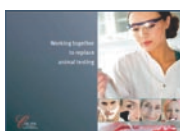


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NEW PUBLICATIONS



Working together to replace Animal Testing

The European cosmetics industry, represented by Colipa, is committed to the replacement of animal testing for all its ingredients as soon as possible. We, the industry, are equally committed to quality and safety, as consumers must have absolute confidence in our ingredients and products. This is why, over the last 20 years, we have assigned significant funding as well as our best scientists and laboratories to researching alternative methods.



Statistics Brochure, 2008

This publication provides an overview of the most important market developments for personal care products in 2008 in Western Europe (EU 15, Norway and Switzerland). Colipa has paid particular attention in gathering data relevant to the market sector trend, and to a qualitative analysis of such data, therefore contributing to a greater knowledge and development of this sector both inside the EU and in other parts of the world. The data has been collected by the Colipa Member Associations of the countries presented and several International Companies' experts.



Colipa Activity Report 2008

The yearly activity report provides an overview of Colipa's work, its membership and activities.



Technical Guidance Document on Minimizing and Determining Nitrosamines in Cosmetics, 2009

This guideline describes possible strategies for minimising nitrosamine formation, some of the methodologies available to measure nitrosamines and suggests a testing strategy which may be applied to both raw materials and finished products. Also included are some guidelines on good analytical practice for each method, to ensure validity of the analytical data.



Guidelines for the Evaluation of the Efficacy of Cosmetic Products, Revised version May 2008

This document replaces the second edition (2001) of the Colipa Guidelines for the Evaluation of the Efficacy of Cosmetic Products. These guidelines aim to assist the cosmetics industry in complying with the applicable European regulations for the efficacy evaluation of cosmetic products. Methodologically sound research is essential for efficacy evaluation, therefore these guidelines provide an overview of established testing methodologies. Human and non-human testing methods for efficacy assessment are also explored.

Colipa Recommendations

All Colipa Recommendations are available on the internet under www.colipa.eu

OTHER PUBLICATIONS

Annual Report

- Colipa Activity Report **2004**
- Colipa Activity Report **2005**
- Colipa Activity Report **2006**
- Colipa Activity Report **2007**

Alternatives to Animal Testing

- Working together to replace Animal Testing, **2009**
- Serious about Cosmetics – Serious about Alternative Methods, **2005**
- Proceedings, Colipa International Conference, **1999**

Recommendations

- Colipa Recommendations – PDF version available on www.colipa.eu (publication section)

Statistics

- Colipa Statistics **2004 - 2005 - 2006 - 2007** English Version (Statistics from 1993 to 2003 available upon request)
- Colipa Statistics **2000 - 2001** – French Version (Statistics from 1996 to 1999 available upon request)

European Union Cosmetics Directive

- The European Union Cosmetics Directive Consolidated Version, **2004**
- The European Union Cosmetics Directive Explanatory Brochure, **2004**
- Cosmetic Product Information: Requirements in the European Union. Updated Guidelines for the Cosmetic Industry based on article 7A of the EU Cosmetics Directive, **2006**
- Cosmetic Ingredient Labelling in the European Union. Updated Guidelines for the Cosmetic Industry based on the 7th Amendment to the Cosmetics Directive, **2006**

Guidelines and Methods

- Technical Guidance Document on Minimising and Determining Nitrostamines in Cosmetics, **2009**
- Guidelines for the Evaluation of the Efficacy of Cosmetic Products, Revised version May **2008**
- Guideline for Colometric Determination of Skin Colour Typing and Prediction of the Minimal Erythema Dose, **2007**
- Method for the In Vitro Determination of UVA Protection Provided by Sunscreen Products, **2006**
- Technical Guidance Document for the Determination of Fragrance Materials in Cosmetic Products, **2006**
- International Sun Protection Factor (SPF) Test Method, **2006**
- Guidelines for Evaluating Sun Product Water Resistance, **2005**
- Guidelines on the Management of Undesirable Event Reports, **2005**
- Analytical Methods for Cosmetics Published, **2004**
- Guidelines on Stability Testing of Cosmetics Colipa/CTFA, **2004**
- Guidelines for the Safety Assessment of a Cosmetic Product, **2004**
- Cosmetic Frame Formulations, **2000**
- Product Test Guidelines for the Assessment of Human Skin Compatibility, **1997**
- Guidelines for Assessment of Skin Tolerance of Potentially Irritant Cosmetic Ingredients, **1997**
- Guidelines for Percutaneous absorption/ Penetration, **1997**
- Guidelines on Microbial Quality Management, **1997**
- Guidelines on the Exchange of Information between Fragrance Suppliers & Cosmetic Manufacturers, **1995**
- Cosmetic Good Manufacturing Practices Guidelines for the Manufacturer of Cosmetic Products, **1994**

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
ASSOCIATION REPRESENTING THE INTEREST OF THE
COSMETICS, TOILETRY AND PERFUMERY INDUSTRY

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