



COSMETICS EUROPE:
ACTIVITY REPORT 2009



**ACTIVITY
REPORT
2009**

 **OLIPA**
THE EUROPEAN
COSMETICS ASSOCIATION

ENHANCING CONSUMER BENEFITS

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WELCOME TO OUR ACTIVITY REPORT



Françoise Montenay
Colipa President

In this report we are focusing on how our industry enhances benefits for our consumers. Whether we are talking about fragrances, decorative cosmetics, skin creams, toiletries or soap and toothpaste, our products are important for the hygiene, self-esteem and general well-being of our consumers.

The cosmetics industry develops products which are valued and appreciated all over the world and which have become an integral part of our everyday lives. In order to meet the increasing expectations of our consumers, we maintain innovation as a top priority in our work. The European agenda of innovation towards 2020 is strongly supported by our industry. We will continue to ensure active input in all areas, including research, development and consumer safety.

I would like to thank Commissioner John Dalli, the European Union's (EU) Commissioner for Health and Consumer Policy, for his keynote message in this report. We value this contribution highly, as our industry will always put the interests and safety of consumers first.

The work of Colipa, the European Cosmetics Association, is clearly valued on the European and indeed the world stage. My thanks go to the member associations and companies for their continued support and to the Colipa staff for their efficiency, which has enabled us to work together effectively over the past year.

A handwritten signature in blue ink that reads "Françoise Montenay". The signature is written in a cursive style and is underlined with a single horizontal line.

“*In order to meet the increasing expectations of our consumers, we maintain innovation as a top priority in our work*”



INTRODUCTION



Bertil Heerink
Colipa Director-General

“EU legislation on cosmetics is now more streamlined while enabling our industry to remain innovative and competitive”

The year 2009 saw negotiations on the new Cosmetics Regulation draw to a close, marking an important milestone for the European cosmetics industry. EU legislation on cosmetics is now more streamlined, while enabling our industry to remain innovative and competitive in Europe and beyond. With the new regulatory framework in place, we can now work together with stakeholders and our members to plan the implementation phase of the new legislation.

Every year, our member companies collaborate extensively on research projects, pooling significant resources in order to maximise results. In 2009, our important work in scientific research achieved even greater prominence and impact. The European cosmetics industry pledged to match European Commission research funds to tackle the complex challenge of systemic toxicity research. This opportunity, under the European Commission’s 7th Framework Programme, has made a total of up to EUR 50 million available for selected scientists and researchers to fund research into alternative testing methods. This unique joint effort represents an effective collaboration between our industry and EU decision-makers.

Colipa aims to support the development of an innovative, sustainable, competitive and respected cosmetics industry in Europe. In order to address today’s priorities more effectively, Colipa has reorganised its internal structure. New working groups, covering a variety of issues of interest to the cosmetics industry, have been established to provide members with a flexible and dynamic framework. This method of working adds value to the activities of Colipa as a whole.

Throughout 2009, Colipa engaged closely with stakeholders, both during the legislative reform process and in scientific research collaboration. The reorganisation of the internal structure of Colipa will increase our ability to work effectively on behalf of the cosmetics industry in Europe, while continued collaboration with stakeholders and decision-makers will ensure that enhanced consumer benefits are delivered well into the future.

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

KEYNOTE MESSAGE

COMMISSIONER DALLI



John Dalli

European Commissioner for Health and Consumer Policy

The consumer is at the centre of the new EU regulation adopted in 2009 which strengthens the safety of cosmetic products, streamlines the framework for all actors, and simplifies procedures thus making the internal market of cosmetic products a reality.

The new legislation is intended to support innovation and should be seen as a framework to maximise the advantages science can offer – but not at any cost. It is fully in line with my policy of “responsible innovation”, where advancement is actively encouraged, but at the same time is underpinned by due regard to issues of risk and safety. Innovators, however, do not only have to ensure their products are safe; they also have a responsibility to explain their benefits to consumers. Trust cannot be taken for granted – it needs to be earned.

The European cosmetics industry embodies that approach. It has proved capable of turning potential threats into opportunities to lead innovation globally and earn the trust of consumers. For example, take the field of animal testing. The EU made a clear political choice against animal testing. The cosmetics industry has taken up the challenge of a more ethical approach to its work and has made a real contribution over the last years to a change of mindset, not only in Europe, but also at the international level, in terms of alternative methods to animal testing. Colipa has committed to match the Commission funding under the 7th Framework Programme on the work on repeated dose systemic toxicity by EUR 25 million and has played an active role in the European Partnership for Alternatives to Animal Testing (EPAA) and in the International Cooperation on Cosmetics Regulation (ICCR).

2009 saw the entry into force of the animal testing ban for ingredients and combinations of ingredients for the purposes of the Cosmetics Directive in the EU as well as of the marketing ban, though with the exception of repeated-dose toxicity, reproductive toxicity and toxicokinetics. For those endpoints, an exemption is in place until 2013. We will be reviewing the availability of alternatives for these endpoints this year and will report to the European Parliament and the Council early next year. I expect industry to make all efforts possible to ensure that progress is made on these remaining endpoints.

Another field where the cosmetics industry is a strong driver of innovation, and has been willing to take on the challenges posed by issues of risk and safety, is that of nanotechnologies. On one hand, it is fruitfully cooperating with the Scientific Committee on Consumer Safety (SCCS) in order to facilitate an appropriate risk assessment of nano UV-filters. On the other hand, I hope it will show the same spirit of cooperation and transparency when the new rules on the labelling and the pre-market notification of nanomaterials, introduced for the first time in the EU by the new regulation, will become applicable. Such an approach will certainly go a long way in strengthening consumers’ trust in the cosmetics industry.

In conclusion, the adoption of the new cosmetics regulation and the application of the animal testing ban made 2009 a special year for the cosmetics industry, which is operating in a changing environment. The changes that are taking place will allow us all to benefit from safer and more innovative cosmetic products which also better respect animal welfare. Colipa has supported the efforts to achieve all this and I know that this fruitful cooperation will continue in the future to ensure the smooth implementation of the new rules.





ENHANCING CONSUMER BENEFITS

A MUTUALLY BENEFICIAL RELATIONSHIP: HOW THE COSMETICS INDUSTRY CONTINUES TO DELIVER FOR CONSUMERS

Relationships are seldom straightforward, but the relationship between the cosmetics industry and its billions of consumers is a rare example of a perfectly symbiotic and mutually beneficial connection. Consumers rely on the cosmetics industry for safe, effective and reliable products, while the industry relies on its consumers for loyalty and custom. The industry is constantly striving to nurture this relationship through increased innovation and constant quality enhancement. As a result, we can continue to deliver benefits and meet growing customer expectations, keeping our mutually beneficial relationship on track.

The relationship between the cosmetics industry and its billions of consumers is a rare example of a perfectly symbiotic and mutually beneficial connection

Competition in the industry drives innovation

Competition powers the cosmetics business internally and drives scientific research and development. It inspires product innovation and motivates more efficient production methods. It certainly stimulates entertaining and ingenious marketing campaigns. As a result, benefits are delivered to consumers externally.

The structure of the cosmetics industry ultimately delivers consumer benefits too. Because there are several large and successful international companies, as well as dynamic, innovative SMEs, there is no single dominant player to dictate the market and the industry remains constantly competitive. There are also many smaller, diverse and imaginative “boutiques” filling gaps in the cosmetics market, or serving specific groups of consumers in niche areas. No consumer need is overlooked.



Constant Quality Enhancement is in our DNA

Over many years the cosmetics industry has pursued what we could call “constant quality enhancement”, an ever higher and expanding target of self-improvement. What is best must get better; what is excellent must excel. This self-imposed pressure benefits consumers by continually improving what it provides for them. No cosmetic company wishes to be left behind or drop down the league table of reputable providers. So the quest for perfection goes on, because there is always room for improvement.

As a consequence of offering more, consumers expect more. It is a race to the top, but there is no top in sight. There is no Everest to conquer for the cosmetics industry, because the mountain of self- and consumer-driven expectations just gets higher.

Look at the history of the industry for positive proof of constant quality enhancement. A hundred years ago you could, of course, buy basic soap and shampoo. But now? A bar of soap no longer satisfies most consumers, although “soap” in some shape or form still sits aside most sinks, showers and bath tubs. But a soap bar in today’s world is simply not sophisticated enough to satisfy the needs of most consumers. A hand or body wash must cleanse without drying the skin and be hypoallergenic. Its perfume must be agreeable to most people in the household, young and old, male and female, trendy or traditional.

And a shampoo is no longer merely shampoo for dry, normal or greasy hair, rather a product that can bind split-ends, curb dandruff, add shine or provide volume for thin hair. And who knows what benefits will be delivered in future?



A track record of meeting growing consumer expectations

Consumers have received enhanced benefits from the cosmetics industry far beyond the expectations of even two or three generations ago. These benefits were once considered “added value” or “optional extras”, attributes that are “nice to have” although not “essential”. Now virtually all of us expect products not only to work and be safe but also to help protect the environment and be produced responsibly. This means ingredients, products, packaging and transportation have to be sensitively sourced, responsibly manufactured, transported and packed in a way that causes no or minimum environmental impact.

Past generations focused on two main questions: does the product work and can I afford it? Today’s consumers certainly ask themselves those core questions, but many increasingly ask: am I getting value for money; can I trust the producer; do they source ingredients and make products sustainably; do they pay suppliers fairly; do they treat their staff properly?

Virtually all of us expect products not only to work and be safe but also to help protect the environment and be produced responsibly

Consumers also expect information to be easily accessible and clearly presented, and the way our industry communicates this information to the public is vitally important to maintaining trust.

The industry maintains customer support through innovation, driven by competition, and constant quality enhancement. Consumers benefit by having a wider range of value-for-money products which work safely and are supplied in a way that is acceptable to the vast majority. The relationship between the industry and consumers therefore continues to deliver mutual benefits.

MORE THAN BEAUTY

“BEAUTY IS ONLY SKIN DEEP” IS A WELL-WORN CLICHÉ,
BUT AS EVER IN LIFE, THE TRUTH IS JUST NOT THAT SIMPLE

We are complex creatures – our external appearance affects our internal well-being, and vice-versa. While inner-beauty allows us to glow on the surface, so too does an outward gleam encourage an inward one!

Most people simply want to look their best, accepting the reality they are not a cinema icon or an haute couture model. However, we all have an “audience” to face – be it a partner, family, friends, colleagues or people we meet socially or at work.

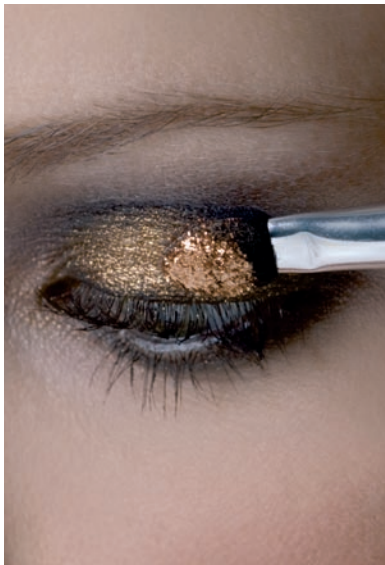
Far from being “skin deep”, caring for our appearance and finding pampering time for ourselves actually impacts our mood, and gradually even our health and well-being.

The healing power of beauty

If we look better, we feel better. If we feel better, we are better. It is not just a matter of perception, it is the reality. The power of the mind to help heal the body is well known. Physicians in many specialities confirm that the patient’s attitude to their illness can make a considerable difference to their prognosis and treatment.

Dr Andrew Papadopoulos, a consultant clinical psychologist working on recovery and well-being programmes in Britain, views “looking good” in terms of our relationships with all we meet.

“I would suggest the link between looking good, feeling good and health relates to the extent a person feels valued by others and also how they want to engage with a relationship,” he says. “Relationships are central to our well-being. Having the confidence that others will value us and want to engage with us is a primary motivator towards informing how we present ourselves.”



Dr Andrew Papadopoulos:

“I would suggest the link between looking good, feeling good and health relates to the extent a person feels valued by others and also how they want to engage with a relationship”

First impressions count

Taking pride in personal appearance is significant to human development. We want to stay clean, not only to look and feel good, but to stay healthy. After all, birds preen feathers, hippos wallow in mud, cats lick themselves and humans wash. And because we like to improve things, we take that extra step to look the best we can.

Imagine going for a job or promotion interview if you had not showered for several days or washed your hair. If first impressions count, the first impression is going to count against you. That's reality, not a superficial and silly concern.

International recruitment and employment experts Manpower know the influence of good grooming. Marketing & Communications boss Catherine Roper says: “We know self-confidence is crucial to performing well at a job interview and in the job itself. If a candidate doesn't have confidence in themselves, you can hardly expect a prospective employer to have confidence in them.”

Benefits for society

The cosmetics industry's contribution to society is, like beauty itself, far more than cosmetic. It invests considerably across Europe, is a major employer and is a world-leading innovator in science, technology and marketing.

Our industry is also at the forefront of sustainable and responsible business practices. We are committed to treating everyone fairly throughout the value chain, from suppliers to employees, and customers, too.

Cosmetics improve the quality of life every day for billions of people, male and female, young and old. They enhance self-confidence, add pleasure and beauty, and deliver basic hygiene, all at affordable prices. Their manufacture provides good jobs and wages to people all over the world, with benefits that cascade through hundreds of thousands of communities. We are proud to be at the heart of this vital industry.



COLIPA'S ACTIVITIES

THE EUROPEAN LEGISLATION ON COSMETICS

The re-drafting of the European cosmetics legislation has been a major focus for Colipa over the past year.

Colipa worked in close collaboration with the European institutions to ensure that the views of the cosmetics industry were taken into account. Now, as the new Cosmetics Regulation (1223/2009/EC) enters the implementation phase, Colipa will be on hand to offer members information and expert advice on how it will work and what action, if any, is required from them.

Odile de Silva, Chair Strategic Project Team (SPT) Recast:

“After 34 years of cosmetics legislation in Europe, we shall now move to the next level of harmonisation via a European Regulation that ensures our industry can remain innovative and competitive.”

The European Cosmetics Directive, which governed legislation in the field for many years, had evolved into a patchwork of legislative instruments including seven amendments and more than 45 technical adaptations. Therefore, in 2003, as part of the European Commission's "Better Regulation" initiative, it was decided that cosmetics legislation should be streamlined.

In 2006, European legislators commenced discussions with stakeholders regarding potential technical changes to cosmetics legislation. For the last three years, Colipa has played an active role in ensuring that the European cosmetics industry has been at the forefront of these discussions and that our message has been communicated in an effective

and coherent manner throughout the process. As a result, Colipa was considered as a credible and reliable partner for expertise during the legislative revision. The new Regulation, which was finally adopted in 2009, will be directly enforceable in all EU member states. Among other things, it offers greater clarity through a set of definitions, a Europe-wide system of product notification, and gives more guidance on the content of the safety assessment dossier than the previous Directive. The new Regulation also establishes certain substance specific requirements such as for the use of nanomaterials in cosmetic products.

Dr Gerald Renner, Director Technical Regulatory Affairs:

“We are at the start of a three year process during which Colipa's members will work together and with all stakeholders to ensure the successful implementation of the new Cosmetics Regulation.”

The revised legislation provides a workable, modern legislative environment which ensures a truly level playing field for all actors in the industry, enabling the industry to continue to provide innovative and safe products to the market. It will also confirm Europe's leading role in the international convergence of cosmetics regulations.

Colipa and its members will work together and with all stakeholders to achieve the successful implementation of this legislation through co-ordinated collaboration between the European and national levels of the Colipa network and by ensuring consistency along the supply chain – from ingredient suppliers to distributors.

SEEKING ALTERNATIVES TO ANIMAL TESTING

Animal welfare and the promotion of alternatives to animal testing are firmly established in EU policy objectives, and anchored in EU law through legislation such as REACH and the Cosmetics Directive. Throughout 2009, Colipa continued its work on researching alternatives to animal testing.

In 2013, a testing and marketing ban on cosmetic ingredients related to systemic toxicity testing in animals will be introduced in the EU. This deadline is particularly challenging for the cosmetic industry because, despite intense investment in scientific research over the years, all alternative strategies needed to replace animal testing for systemic effects has not yet been achieved.

Rob Taalman, Director Research Project Management:

“Today, the cosmetics industry continues to lead research into replacement alternative methods”

For over 20 years, the cosmetic industry has worked hard to find alternative methods of safety testing without using animals. In 1992, Colipa created the “SCAAT” initiative to co-ordinate the efforts of the cosmetic industry in the development, validation and acceptance of alternatives to animals in safety evaluation. SCAAT was financed by a significant number of companies from the industry.

In addition to money invested by industry in this research, substantial funds are available under the EU framework programmes for both fundamental and applied research in the area of alternatives.

Colipa reiterated its commitment to finding alternatives to animal testing again in 2009 when the European Commission launched a Call for Proposals for research into alternative testing methods. The initiative was backed by additional funding from members of Colipa, who made EUR 25 million available, matching the funds offered by the European Commission and bringing the funding total to EUR 50 million. The initiative aims to develop a strategy towards alternative solutions to animal testing in the field of repeated dose systemic toxicity, a crucial area that can only be addressed through a cutting edge research programme.

Dr Horst Wenck, Chair of the Strategic Project Team on Alternatives:

“This marks another step forward in the challenge to find alternative methods to animal testing. The cosmetics industry has clearly shown its continued commitment to alternatives through this European Commission initiative. We look forward to the research results of our unique joint effort”

This unique co-operation, which was announced in November 2008 by Commissioner Potočnik during the Annual Conference of the European Partnership for Alternatives to Animal Testing (EPAA), means that research projects under this Call for Proposals may be funded up to 100 percent.

Meanwhile, substantial progress has also been made in 2009 in further developing test methods and in methods validation.



Eye Irritation

The current Colipa research programme in Eye Irritation aims 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 Human Reconstructed Tissue (HRT) assays using the MatTek EpiOcular™ and SkinEthic HCETM human corneal models. In collaboration with the HRT suppliers, pre-validation datasets have been completed enabling these methods to enter the next phase of prospective ECVAM validation. Another collaborative effort with ECVAM is a retrospective statistical analysis which is required to integrate different types of current *in vitro* assays already validated to fit the ECVAM Top-Down/Bottom-Up approach to reduce and replace *in vivo* studies. Part of the programme is focused on continued development/optimisation of promising models incorporating new parameters e.g. that measure depth of injury. The knowledge gained from all of these activities will help to establish relevant and reliable systems and will create a battery of *in vitro* assays that could evaluate eye irritation across the range of irritancy for different chemical classes.

Genotoxicity/Mutagenicity

The current Colipa research programme in Genotoxicity aims to improve and develop methods to avoid unnecessary loss of valuable cosmetic ingredients caused by a high rate of false positives in currently accepted genotoxicity tests. To address this problem, Colipa continues to fund research to improve existing *in vitro* standard genotoxicity tests. A particular focus area is the development of genotoxicity assays based on 3D human skin models.

The Genotoxicity project team is also managing a Human skin metabolism programme which is focussed on safety assessment of topically applied chemicals. The knowledge gained by this programme will be used to generate non-animal tests that have higher predictive value at more realistic levels of human exposure.

Skin Allergy (2013)

At present, animal test methods are required to characterise the potential for new chemicals to induce skin allergy where significant skin exposure is predicted. However there is an urgent need to develop & apply non-animal test methods for this purpose. Colipa continues to fund research to explore the processes governing the induction of skin sensitisation and method development. The main areas being investigated are: bioavailability, chemical reactivity, protein/peptide binding, skin metabolism, Dendritic Cell activation and migration mechanisms, T cell proliferation and the construction of recombinant cell lines or multi-cell type human skin models for the evaluation of chemicals. These activities have already led to the successful development of three *in vitro* test methods for the detection of potential sensitisers: the direct peptide reactivity assay (DPRA), the human Cell Line Activation Test (h-CLAT) and the Myeloid U937 Skin Sensitisation Test (MUSST) that have all now been accepted by the European Centre for the Validation of Alternative Methods (ECVAM) for pre-validation. In addition, 10 different research and method development projects continue to provide new insights, a continuous feed of new non-animal test methods and a physiological rationale for combining data from these different test methods to predict skin sensitiser potency in the absence of new animal test data.

OTHER COLIPA PARTNERSHIPS

Colipa actively supports the European Partnership on Alternative Approaches (EPAA) launched in 2005 by Vice President Verheugen, Commissioner Potočník and representatives from seven industry sectors including Colipa. This is an important forum for promoting the alternative approaches for Safety Assessment. Today, all relevant Commission services participate in the EPAA, together with 39 individual companies and 7 European trade federations.

A particular feature of the EPAA is its multi-sectoral nature, thereby creating opportunities to cooperate not only between “regulators” and the “regulated”, but also across different sectors, by exchanging information on alternative approaches.

The EPAA is pooling resources, knowledge, ambition and commitment – its main objective is to promote alternative approaches in meeting regulatory requirements, based on sound and innovative science. One of the biggest challenges is the regulatory acceptance of alternatives – the EPAA is exploring how knowledge can be disseminated best to optimise the process towards wide regulatory acceptance.

In 2010, the lead theme will be the potential of reduction and refinement.

BLOCK EXEMPTION REGULATION (BER)

Yves De Bruyne, Chair Strategic Project Team (SPT) BER:

“*Colipa was pleased with the previous Block Exemption, which worked very well over the last decade, and is confident the new Regulation will principally maintain the status quo*”

The Block Exemption Regulation (BER) 2790/1999, which regulates exclusive and selective distribution in Europe, was revised and renewed ahead of its 31 May 2010 deadline for revision or renewal.

Article 101 of the Treaty on the Functioning of the European Union prohibits agreements between firms that may restrict competition, subject to some limited exceptions. The BER lists some of these exceptions and lays down the conditions under which certain “vertical” agreements that are very important to the cosmetics industry, such as selective or exclusive distribution agreements, are legally acceptable.



SUSTAINABLE DEVELOPMENT

Throughout 2008 and 2009, interested stakeholders and authorities prepared the ground for the revised BER. Naturally, interested parties were not always in agreement, leading to a number of heated debates, particularly on the issue of internet sales.

During the summer of 2009, the European Commission invited all interested stakeholders to participate in the consultation process and Colipa, through its Block Exemption Regulation SPT, took an active part in the discussions. The final text adopted by the European Commission is very much in line with the previous text, as requested by the industry.

Overall, Colipa welcomes the continuation of the current block exemption and of the current legislative framework, both of which have improved efficiency over the past decade, particularly in relation to internet sales.

Dave Duncan, Chair of the Strategic Project Team (SPT) Sustainable Development:

“Sustainability is clearly very important to Colipa and its membership. The Strategic Project Team (SPT) on Sustainable Development is doing an excellent job, as shown by its current work in developing Good Sustainability Practice”

Colipa has identified sustainable development as a key strategic priority, and in 2009 embarked on a number of sustainability-focused initiatives led by a multidisciplinary Strategic Project Team. The team has developed a framework for Colipa's sustainability strategy and has established a concrete action plan to guide future progress on this issue.

Additionally, in order to share best practices on sustainable development with the retail sector, Colipa joined the EU Retail Forum which brings together the retailers and the Commission to discuss sustainability issues. The Forum aims to reduce the environmental impact of the retail sector and its supply chain, promote more sustainable products and increase the availability of information to consumers on 'green' purchasing opportunities.

Colipa has also established key principles regarding sustainability-related communication to consumers.

INTERNATIONAL CONVERGENCE

The Strategic Project Team on International Convergence guides Colipa's international regulatory convergence in the long-term. It focuses on the US, Canada, the EU, Japan (via the "ICCR" process) and other key countries (Brazil, Russia, India and China).

The third meeting of the International Cooperation on Cosmetics Regulations ("ICCR") took place in 2009 in Tokyo. This process is an informal regulatory cooperation forum between the cosmetics regulatory authorities of Canada, the EU, Japan and the United States. Industry is a key participant in this dialogue, providing approximately half of the experts in the various working groups.

Activities in Russia and Brazil have focused on building our relationships with the relevant national trade associations and, in Russia, directly with the national authorities. Opening up clear lines of communication and building trust will be a pre-requisite to gaining influence in those countries.

In 2010, the world's cosmetics importers in China will be confronted with a major regulatory challenge, with the publication of a new draft law on the registration of cosmetics ingredients and finished products. The industry's efforts to connect with the Chinese Food and Drugs Administration (SFDA) to clarify the new provisions will have a decisive impact on our industry's ability to handle the implementation of this new law.

On the multilateral level, Colipa continues to input into the ISO process for standards relevant to cosmetics.

PUBLIC AFFAIRS

Julie Vermooten, Director Public Affairs and Chair of the Core Competence Committee for Advocacy:

“A critical success factor for an efficient advocacy campaign is to ensure a one voice approach with a strong commitment to the agreed strategy.”

The review of the European cosmetics legislation was a major focus of Colipa's public affairs activities during the first quarter of 2009. The united "one voice" approach of the cosmetics industry, achieved through cooperation with national associations and member companies, undoubtedly contributed to the adoption of an effective and workable Regulation. Meanwhile, other key issues during the year included nanotechnology and the revision of the Block Exemption Regulation.

John Humphreys, Chair Strategic Project Team International:

“We are confident that the ICCR process will allow for continued discussion on important topics for the cosmetics industry, such as nanotechnology, alternatives to animal testing and ingredient and product safety.”



COMMUNICATIONS

In light of the changes brought about by the European Parliament elections and the impending change of Commission, there was also a considerable focus on political outreach in the form of face-to-face meetings with members of the European Parliament, the European Commission departments and other relevant stakeholders.

A scientific debriefing on the theme of Alternatives to Animal Testing, sponsored by Dagmar Roth-Behrendt MEP, took place in the European Parliament during the year. The event, which was well-supported by Members of the European Parliament, NGOs, media, European Commission officials and Member State representatives, outlined for stakeholders some of the main challenges likely to face the cosmetics industry in the coming years.

Looking ahead, advocacy priorities for the future include a focus on innovation and the implementation of the Sustainable Development Strategy.

In addition, ongoing efforts are being made to communicate the benefits of cosmetics products and the importance of the cosmetics industry in Europe. These messages are particularly relevant in the context of the European Commission's recently-launched Europe 2020 Strategy which focuses on innovation as a key to recovering from the financial crisis.

Emma Tuddenham, Communications Director and Chair of the Core Competence Committee on Internal & External Communications:

“Effective internal and external communications are key to our association's work”

Internal communications remain a cornerstone of Colipa's work. By extensively developing tools such as the members-only website during 2009, we have helped to ensure that member companies and associations have 24-hour access to a wide range of information and expertise.

A major focus of our external work over the past year has been our joint communications with the European Commission on a specific initiative under the EU's 7th Framework Programme. Members of Colipa announced they would provide EUR 25 million in funding to develop a strategy towards alternative solutions to animal testing, bringing the fund for the European Commission's Call for Proposals to EUR 50 million. Colipa engaged in activities to communicate the news widely, including organising events with the European Commission at the World Congress on Alternatives in Rome, 31 August-3 Sept 2009. In order to achieve maximum outreach to scientists and researchers, a large audience was regularly updated on this initiative via the Colipa website and a special scientific internet forum.

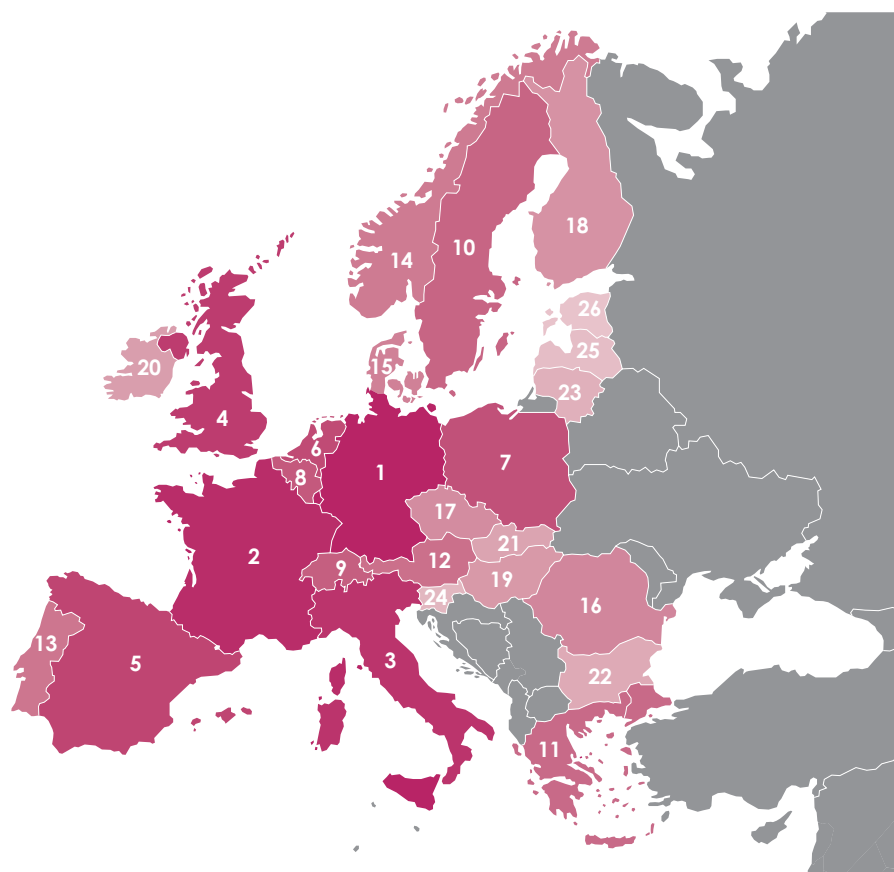
The Colipa General Assembly 2009 had as its theme “Value and values in today's cosmetics industry”. The General Assembly is the annual meeting place of the cosmetics industry which offers cosmetics industry representatives the opportunity to network with collaborators from outside Europe as well as external stakeholders.

Challenges for the coming year include continuing our effort to communicate the progress our industry has made in finding alternative methods as well as talking about our innovative industry and the benefits of our wide range of cosmetics products for consumers.

THE EUROPEAN COSMETICS MARKET 2009

European Cosmetics and Toiletries* Market in 2009: EUR 69,5 billion
 The European market represented almost one third of the global market

No	Country	EUR bn
1	GERMANY	12.829
2	FRANCE	10.517
3	ITALY	9.108
4	UK	8.855
5	SPAIN	4.502
6	NETHERLANDS	2.779
7	POLAND	2.361
8	BELGIUM/LUX.	1.850
9	SWITZERLAND	1.768
10	SWEDEN	1.299
11	GREECE	1.375
12	AUSTRIA	1.233
13	PORTUGAL	1.292
14	NORWAY	1.066
15	DENMARK	0.967
16	ROMANIA	0.848
17	CZECH REPUBLIC	0.835
18	FINLAND	0.808
19	HUNGARY	0.651
20	IRELAND	0.581
21	SLOVAKIA	0.431
22	BULGARIA	0.256
23	LITHUANIA	0.197
24	SLOVENIA	0.164
25	LATVIA	0.091
26	ESTONIA	0.088



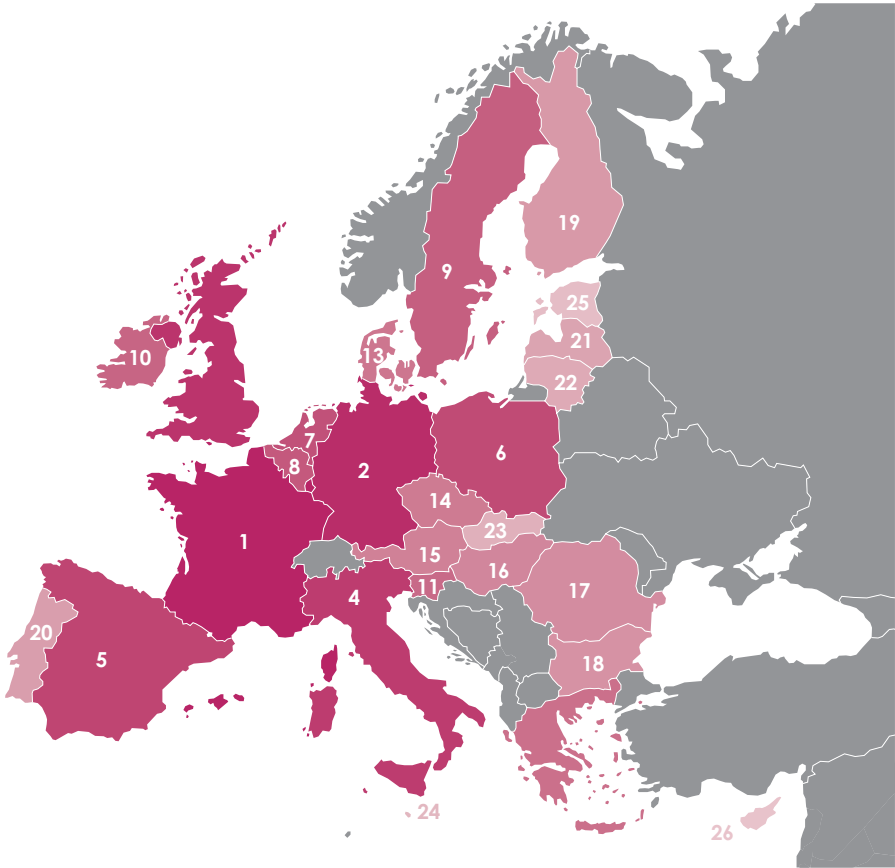
* Value Retail RSP, EUR bn; includes: decorative cosmetics, hair care, fragrances, skin care and toiletries

Sources: Colipa Association members and Euromonitor



European Cosmetics and Toiletries Industry Export Market in 2008: EUR 11.7 billion**

No	Country	EUR mn
1	FRANCE	4488.9
2	GERMANY	2272.2
3	UK	1031.9
4	ITALY	986.8
5	SPAIN	672.1
6	POLAND	642.0
7	NETHERLANDS	377.6
8	BELGIUM/LUX.	293.6
9	SWEDEN	119.7
10	IRELAND	118.3
11	SLOVENIA	116.4
12	GREECE	86.3
13	DENMARK	85.9
14	CZECH REPUBLIC	76.6
15	AUSTRIA	63.2
16	HUNGARY	55.9
17	ROMANIA	53.2
18	BULGARIA	42.6
19	FINLAND	27.7
20	PORTUGAL	20.5
21	LATVIA	19.3
22	LITHUANIA	12.1
23	SLOVAKIA	4.3
24	MALTA	3.3
25	ESTONIA	2.8
26	CYPRUS	1.0



** EU27

Sources: Colipa Association members and Euromonitor



EVENTS 2009



Françoise Montenay
Colipa President



Colipa General Assembly 2009

The Colipa General Assembly 2009 was the meeting place for the cosmetics industry representatives from across Europe and the wider world. Held in Bled, Slovenia from 27-29 May, around 150 participants came together for a packed programme including the annual Scientific Forum and the Open Session.



Romana Jordan Cizelj MEP

The Scientific Forum welcomed Panagiotis Daskaleros from the European Commission's Health and Consumer Affairs Directorate. Speakers, and over a hundred participants, also discussed the review of European cosmetics legislation, as well as Good Manufacturing Practices.



Panagiotis Daskaleros

The annual Open Session focused on the theme of "Value and values in today's cosmetics industry". Speakers included Slovenian Member of the European Parliament, Romana Jordan Cizelj and Dr Christian Blumelhuber. An overview of progress in alternatives research was given by Dr Horst Wenck.



Farewell to Danièle Marteaux

After 30 years of valued service, Danièle Marteaux retired from Colipa in December. Danièle was the Director Finance and Administration and contributed tirelessly to the management of Colipa. Members and colleagues wished her well in her future endeavours during a special dinner.



Ruxandra Draghia Akli

Events held jointly with the European Commission at the VII World Congress on Alternatives

The VII World Congress on Alternatives and Animal Use in Life Sciences took place in Rome from 31 August to 3 September.

Colipa and the European Commission presented joint information events during the Congress. The events focused on the opportunity for scientists and researchers to obtain research funding for a specific area in the field of alternatives. The funding was made available following a European Commission Call for Proposals under the 7th Framework Programme. The cosmetics industry offered EUR 25 million in addition to the EUR 25 million already made available by the European Commission. Over 150 participants attended each event, enabling interested scientists and researchers to address questions to the experts and to learn more about the details of the research programme.

Ruxandra Draghia Akli, Director Health from DG Research, spoke on behalf of the European Commission. Colipa's Director-General, Bertil Heerink, welcomed the opportunity to work together with the Commission to encourage research into this important area.

Debriefing on the outcome of the VII World Congress

Following the VII World Congress on Alternatives and Animal Use in Life Sciences, Colipa organised a Brussels Debriefing at the European Parliament on 29 September. At the invitation of Dagmar Roth-Behrendt MEP, around a hundred participants discussed the outcome of the Congress. Thomas Hartung, Director of CAAT and co-organiser of the Congress, addressed the audience on the question "Has the call for science been heard?".



Bertil Heerink, Colipa Director-General



Thomas Hartung

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Dr Giancarlo Melato – UNIPRO – Associazione Italiana Delle Imprese Cosmetiche
Mr Garrett Moran – IKW – Industrieverband Körperpflege- und Waschmittel
Dr Klaus Rettinger – IKW – Industrieverband Körperpflege- und Waschmittel
Mr Yan Sherwin – Colgate-Palmolive
Mr Ryuji Sugai – Kanebo Cosmetics
Mr Yves Valty – LVMH
Ms Susan Wemyss – Estée Lauder Companies

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Chair

Dr Sylvie Cupferman – L'Oréal

Mr Alex Blanchard – Procter & Gamble
Mr Michael Bogdahn – Beiersdorf
Dr Nadine Bresciani – Chanel SAS

Dr Lorraine Caskie – Unilever
Ms Agnès Exandier – Johnson & Johnson
Ms Elena Perez – STANPA – Asociación Nacional de Perfumería y Cosmética
Dr David Preston – Colgate-Palmolive

Dr Klaus Rettinger – IKW – Industrieverband Körperpflege- und Waschmittel
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Ms Regine Scholtyssek – Henkel

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Dr Jens Burfeindt – IKW – Industrieverband Körperpflege- und Waschmittel
Dr Dominique Castelli – Johnson & Johnson
Dr Eric Dufour – L'Oréal
Dr Catherine Firmani – Chanel SAS

Mr Charles-François Gaudetroy – Unilever
Dr Mark Griffiths – Procter & Gamble
Ms Sarah Henley – Avon
Dr Lindsay Holden – CTPA – Cosmetic, Toiletry & Perfumery Association
Mr Hirofumi Kuwahara – Kanebo Cosmetics
Mr Takashi Nakayama – Shiseido

Mr David Panyella – STANPA – Asociación Nacional de Perfumería y Cosmética
Mr Damani Parran – Colgate-Palmolive
Dr Joanna Rowland – GlaxoSmithKline
Mr Yves Valty – LVMH
Dr Ronald Van Welie – N.C.V. – Nederlandse Cosmetica Vereniging

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Dr Eric Antignac – L'Oréal

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Dr Maria Langhals – Beiersdorf

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Fédération des Entreprises de la Beauté

Mr Frederik Ortiz – Colgate-Palmolive

Dr Alexandre Panel – Pierre Fabre Dermo-Cosmétique

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Dr Beate Miller – Colgate-Palmolive

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Nederlandse Cosmetica Vereniging

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Ms Michèle Elbaz – Shiseido

Ms Monica Iranzo – STANPA – Asociación Nacional de Perfumería y Cosmética

Ms Nathalie Louvet – L'Oréal

Dr Kenneth Marenus – Estée Lauder Companies

Mr David Nuber – Colgate-Palmolive

Dr Wolfgang Pape – Beiersdorf

Dr Claudio Pari – L'Oréal

Dr Chris Powell – Unilever

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Dr Dominique Castelli – Johnson & Johnson

Mr Paul Crawford – CTPA – Cosmetic, Toiletry & Perfumery Association

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

Ms Michèle Elbaz – Shiseido

Mr Charles-François Gaudefroy – Unilever

Dr Mark Griffiths – Procter & Gamble

Dr Michel Julemont – Colgate-Palmolive

Dr Hans-Joachim Kätker – Coty

Dr Joachim Kremer – Henkel

Mr Jerome Lejeune – L'Oréal

Dr Amanda Long – Avon

Ms Isabelle Martin – Estée Lauder Companies

Dr Michael Meyberg – Beiersdorf

Mr Artur Puig – STANPA – Asociación Nacional de Perfumería y Cosmética

Ms Isabelle Robert – LVMH

Mr François Spezia – Chanel SAS

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Dr France Boyer – Pierre Fabre

Dermo-Cosmétique

Mr Mike Brown – CTPA – Cosmetic, Toiletry & Perfumery Association

Dr Jens Burfeindt – IKW – Industrieverband Körperpflege- und Waschmittel

Dr Dominique Castelli – Johnson & Johnson

Mr François Cottard – L'Oréal

Dr Amanda Long – Avon

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Dr Andy Homan – Unilever

Dr Amanda Long – Avon

Dr Mary Ann McKeever-Alfieri – Estée Lauder Companies

Dr Beta Montemayor –

The Canadian Cosmetic, Toiletry and Fragrance Association

Mr Takashi Nakayama – Shiseido

Dr Christophe Perés – Chanel SAS

Dr Claudius Rapp – Beiersdorf

Dr Klaus Rettinger – IKW –

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STAFF

ORGANISATION CHART

Bertil Heerink
Director-General

<p>Technical Regulatory Affairs</p> <p>Gerald Renner Director</p> <p>Manuela Coroama Senior Manager</p> <p>Florian Schellauf Issue Manager</p> <p>Evelyn Coelis Issue Manager</p> <p>Orla Fenlon Assistant</p>	<p>Research Project Management</p> <p>Robert Taalman Director</p> <p>Monique Marrec-Fairley Project Manager Alternative Methods to Animal Testing</p> <p>Anne-Marie Lekeux Project Assistant</p> <p>⋮</p> <p>Irene Manou Issue Manager (seconded to EPAA)</p>	<p>Legal Affairs</p> <p>To be appointed Director</p> <p>Maud Garnier Issue Manager</p> <p>Layela Idir Assistant</p>	<p>Public Affairs</p> <p>Julie Vermooten Director</p> <p>Marie Blanchard Intern</p> <p>⋮</p> <p>Catherine Van Vaerenbergh Assistant Communications and Public Affairs Departments</p>	<p>Communications</p> <p>Emma Tuddenham Director</p> <p>Betina Simonsen IT Project Manager</p> <p>Corentin Bondroit IT technical support & maintenance Intern</p> <p>Vladimir Dimoski Intern</p>	<p>Resources & Services</p> <p>Daniel Leus Financial Manager</p> <p>Samia Essouayah HR & Services Manager</p> <p>Brigitte Frère Assistant</p> <p>Delphine Gilles Office Assistant</p>
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GENERAL MANAGEMENT



Bertil Heerink,
Director-General

RESOURCES & SERVICES



Daniel Leus
Financial Manager
Monitoring and follow-up of the Association's accounting
Financial matters



Samia Essouayah
HR & Services Manager
Human Resources
Support to DG related to Management Team, Board of Directors, Management Committee and Statutory General Assembly



Brigitte Frère
Assistant
General administrative support to DG
Support to meetings of Colipa advisory bodies
Colipa event support



Delphine Gilles
Office Assistant

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Robert Taalman
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SPT AAT
SPT AAT Core Group
Steering Committee of the Consortium of Alternatives to Sys Tox
All related TFs



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Alternatives to Animal Testing



Anne-Marie Lekeux
Project Assistant

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Antitrust & Competition Law
Support to i.a CCC Legal



Layela Idir
Assistant

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Chair of CCC Technical
and Regulatory
CCC Science
International Collaboration on
Cosmetic Regulation (ICCR)
All related TFs



Evelyn Coelis
Issue Manager
ET Ingredients Defense
ET Traces
ET Microbiological Protection
of Products
ET Natural/Organic Products
ET Sun Care Products
All related TFs



Manuela Coroama
Senior Manager
SPT Sustainable Development
Recast implementation issues
Other regulations (REACH,
VOCs, biocides, etc.)
Consumer habits & practices
All related TFs



Orla Fenlon
Assistant



Florian Schellauf
Issue Manager
ET Hair Preparation
ET Nanotechnologies
ET Perfumes
ET Oral Care
All related TFs

PUBLIC AFFAIRS



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Chair of CCC Advocacy



Catherine Van Vaerenbergh
*Communications/Public
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Marie Blanchard
Intern

COMMUNICATIONS



Emma Tuddenham
Director
Chair of CCC Internal & External
Communications
Key Account Manager
Membership Contacts
All related TFs



Betina Simonsen
IT Projects Manager
IT support for extranet
and website
IT projects



Corentin Bondroit
IT Intern
Technical Support
and Maintenance



Catherine Van Vaerenbergh
*Communications/
Public Affairs Assistant*



Vladimir Dimoski
Intern

NEW FROM COLIPA



Colipa Activity Report 2009

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



Method for *In Vitro* Determination of UVA Protection, 2009

These guidelines cover a method which has been welcomed by the European cosmetics industry. The method is now used as a standard procedure in both manufacture and contract test laboratories across Europe.



Cosmetics and Animal Testing: the Facts

This 2-sided information leaflet gives important facts about cosmetics and animal testing. It explains how the cosmetics industry is working to develop alternative testing methods.



www.colipa.eu is the Colipa public website.

The site contains information on scientific and regulatory aspects of the European cosmetics industry.



The Extranet is the members-only website.

It contains extensive information for Colipa's member companies and associations.

COLIPA'S PUBLICATIONS

Annual Report

- Colipa Activity Report **2008**

Alternatives to Animal Testing

- Working together to replace Animal Testing, **2009**
- Cosmetics and Animal Testing: the Facts
- Serious about Cosmetics – Serious about Alternative Methods. Updated Version, May **2007**
- Serious about Cosmetics – Serious about Alternative Methods, **2005**
- Proceedings, Colipa International Conference, **1999**

Recommendations

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

Statistics

- Colipa Statistics **2004-2005-2006-2007-2008**

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 Cosmetics industry based on article 7A of the EU Cosmetics Directive, **2006**
- Cosmetic Ingredient Labelling in the European Union. Updated Guidelines for the Cosmetics industry based on the 7th Amendment to the Cosmetics Directive, **2006**

Guidelines and Methods

- Technical Guidance document on Minimizing and Determining Nitrosamines in Cosmetics, **2009**
- Guidelines for the Evaluation of the Efficacy of Cosmetic Products, Revised version May **2008**
- Guidelines for Monitoring UV Radiation Sources, **2007**
- 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**

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

COLIPA – THE EUROPEAN COSMETICS ASSOCIATION

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Our Vision

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

Our Mission

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

Our Goals

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

Earn public trust

by fostering transparent and reliable relationships with public authorities and stakeholders. This enables it to communicate most effectively the social and economic relevance of the cosmetics industry in terms of satisfying consumer needs.

Achieve effective public policy

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

Enhance member value

by addressing their needs in an efficient and transparent way through timely information and decision making processes. Focus on the issues and activities important to members. Make best use of members' expertise and dedication in order to optimise efficiency and one-voice positions.

COSMETICS EUROPE IS THE EUROPEAN TRADE
ASSOCIATION REPRESENTING THE INTEREST OF THE
COSMETICS, TOILETRY AND PERFUMERY INDUSTRY

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