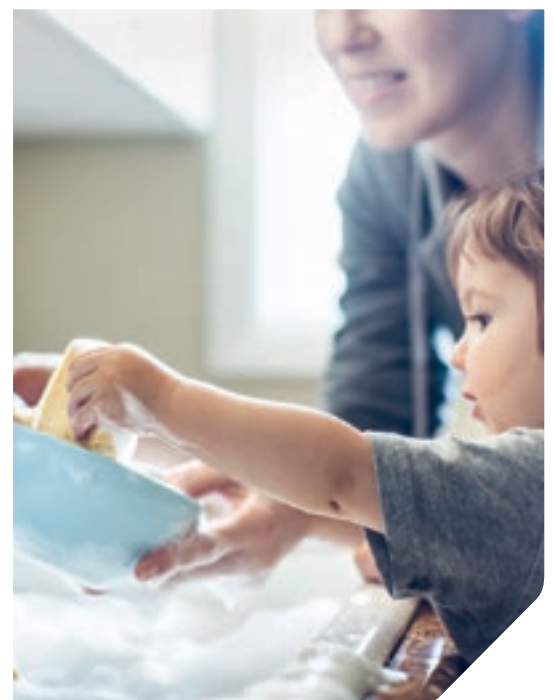


The German Cosmetic, Toiletry,
Perfumery and Detergent Association

Annual Report 2017.2018



50 | | KW^{''}
YEARS
BEAUTIFUL.LIFE.

The German Cosmetic, Toiletry, Perfumery and Detergent Association (IKW), with office in Frankfurt am Main, was set-up in 1968 and is today one of the highest-profile industry associations in Europe.

IKW supports, advises and represents the interests of more than 420 small, mid-sized and large companies from the fields of beauty and home care. The industry with approximately 500,000 associated jobs had a sales value of more than 18 billion EUR in the past year. The member companies cover about 95 percent of the market.

The products of the companies represented by IKW are used on an almost daily basis by every household. IKW satisfies the resulting need for information through its high readiness to engage in a dialogue with all stakeholders involved and hence strengthens the credibility of product-related communication concerning the use and safety of beauty and home care products.

The Association supports its members, amongst other things, through a comprehensive service at the implementation of regulations, agency services for foreign trade shows and the processing of market data. It advises within the framework of diverse trainings, seminars, events and workshops as well as through written position papers and represents the interests of member companies through a comprehensive package of PR and communication activities as well as a far-reaching network.



Dear Madam,
Dear Sir,

The 1968 went down in history as the "Year of Revolt". The term "68ers" stands for a generation which was striving for fundamental changes in politics, society and lifestyle.

Even if the "revolutionary" gesture of many protagonists of that time meets with disconcertment today, many positions claimed by the "68ers" are today reflected by natural behaviours and values which have become generally recognised – be it gender equality, diversity and self-determination, democratic participation or environmental protection.

For our industry, 1968 also involved an important setting of our course of action. With the foundation of the German Cosmetic, Toiletry, Perfumery and Detergent Association (IKW) in Frankfurt am Main on 6 December, 106 companies showed their farsightedness at that time. The Association was to create for the member companies "the best possible prerequisites to seizing their opportunities on the large European market". An objective which has remained absolutely topical. The European Economic Community of the 1960s with its six member states has developed today into the European Union (still) counting 28 members – a confederation of states which has become a cornerstone of economic strength and political stability in Germany and Europe.

In the European Economic Area business activities are in full swing. Within the EU the value of goods and services increased by 2.4% in 2017 and in Germany the rise amounted to 2.2%. Apart from the good order situation in the export-oriented industry, the booming domestic demand acts as a growth driver.

With EUR 18.2 billion or + 0.3% sales revenues the beauty care and home care products were again a driver of private consumption in Germany. For the current year the IKW members are likewise optimistic. In a survey conducted at the end of 2017, 68% considered that the future market development will be "good" or "very good"; almost two-thirds are currently dealing with "major investments". If the expectations of our companies are met, the total value of products sold will rise this year by 2%.

A good look and cleanliness remain highly popular with consumers. This applied decades ago and is still the case – albeit under very different signs as far as lifestyle and social trends are concerned. Youth has a major impact on zeitgeist: for millennials and even younger consumer generations there is no longer a beach under the pavement but a highly efficient fibre optic cable. Their favourite pastime is the production and sharing of films, pictures and text messages with their mobile phones. The fact that the control of one's own appearance is also important when posting selfies is proven by the IKW Youth Study "Selfies Undisguised".

From posting to cleaning. Whilst the motto of the revolutionists 50 years ago was: "Everything private is political", the retreat to privacy is considered in today's totally networked world as a vital alternative programme to the sometimes chaotic everyday life. As a result of the increased desire for reliability and structure, for the own and familiar, home care receives a positive reassessment as proven by the IKW study "The New Power of Cleaning": cleaning as an "analogue" experience during which one experiences the success of one's own doing directly. An experience for the senses even for digital junkies.

These examples illustrate how much we have our finger on the pulse of the time with our products. To ensure that IKW is also heard in the public at large, we have consistently enhanced our communication over the past years. A focal point is always the information about scientific facts. In particular in public debates about alleged risks caused by certain ingredients, the competency of IKW is in great demand. We do not only contribute it at specialist events and stakeholder meetings such as the COSMETICS DIALOGUE or the FORUM WASCHEN but increasingly also in media contacts.

At press conferences, visits to editorial offices, round tables and blogger events IKW takes a proactive approach to the media. With a twitter channel under [@IKW_org](#) we strengthen our online presence through topical and direct communication with our reference groups. Moreover, we offer reliable research sources like the website www.ikw.org. In addition, consumers find information and tips on www.haut.de, www.forum-waschen.de and www.waschtipps.de – online offerings which we have developed together with other institutions from the fields of science, medicine and consumer protection.

As the voice of an industry with more than 420 companies which secures employment for half a million people throughout the entire value chain, IKW is, however, also a central contact for the political community and public authorities. Apart from economic policy issues, the focus

is on consumer safety and environmental protection. For the IKW experts talks to members of parliament in Berlin and Brussels, panel discussions, hearings or consumer forums are part of their core tasks. This work contributes towards consumers being able to rely on a maximum of product safety and environmental protection – within a fair and equally binding statutory framework for all market players.

Back to our foundation year: in 1968 the movie "2001 – A Space Odyssey" had its premiere with the subject artificial intelligence and the voice-controlled supercomputer HAL 9000. Today's voice-controlled, intelligent assistance systems are called Siri, Alexa or Cortana. Following a voice command these and many other digital helpers connect us with a network of huge, learning databases. This opens up fascinating new applications and at the same time also new marketing opportunities for products and services.

Our round anniversary is also an opportunity to look into the future. What will we deal with, what will be satisfying or also alarming? I am happy to leave the glance into the crystal ball to the trend researchers of the Zukunftsinstitut in our study "Schöner.Leben.". However, one thing appears to be obvious for me: people will continue to take care of their body and their home during the more remote decades as well. The signs for the next 50 years of "Schöner. Leben." ("Beautiful. Life.") are hence favourable.

Yours sincerely



Georg Held

President

The German Cosmetic, Toiletry,
Perfumery and Detergent Association



Contents

Situation p04




 **Economic Development** p08

- ↳ Beauty Care Product Market
- ↳ Home Care Product Market
- ↳ Market Conditions
- ↳ Outlook


 **Beauty Care** p20

- ↳ Legal background
- ↳ Responsible person
- ↳ Cosmetics GMP
- ↳ Labelling
- ↳ Product Safety
- ↳ Cooperation
- ↳ 20 years of safety assessor courses
- ↳ IKW Youth Studies

 **Anniversary** p32

- ↳ 50 years of Beautiful.Life.
- ↳ Chronology of IKW
- ↳ Greetings for the 50th anniversary
- ↳ IKW Future Study Beautiful.Life.




 **Interdisciplinary Activities** p14


- ↳ Medium-sized Businesses
- ↳ International Business
- ↳ Press & Press Feedback
- ↳ Further Activities

 **Home Care** p26


- ↳ Public Relations
- ↳ Product Safety
- ↳ Sustainability
- ↳ Technical Topics
- ↳ Legal Regulations

 **Europe** p40

- ↳ "Quo vadis, Europe?"
- ↳ Reception at the European Parliament
- ↳ Our Activities in Europe

 **List of Members** p44

- ↳ Members
- ↳ Corresponding Members
- ↳ Memberships / Cooperations

 **Office** p52

- ↳ Management and Administration
- ↳ Beauty Care Department
- ↳ Home Care Department
- ↳ Law and Packaging Department

Imprint p53





Economic Development

Beauty, wellbeing and desire for a neat home constitute the fundamental needs of consumers.

The member companies of the German Cosmetic, Toiletry, Perfumery and Detergent Association have placed these needs centre stage in view of their activities and satisfy them with high-quality and responsibly manufactured products. Beauty care products help contribute towards remaining well groomed and healthy. Home care products support cleaning and care e. g. at home, for clothes, shoes and cars and not only help to preserve their value but also create an atmosphere in which people feel at ease and healthy. And in addition beauty care and home care products fulfil dreams and ensure recognition and self-confidence, as confirmed by market research.

The high acceptance of products amongst consumers results in permanently rising consumption spending and turns the products of the beauty care and home care

industry into an important pillar of private consumption in Germany. During the past years sales revenues were significantly rising to more than EUR 18 billion.¹

The two product segments beauty and home care were again major drivers of domestic demand. Every eighth euro is currently spent on beauty and home care in the German food retail trade.

This means that the German market is by far the largest in Europe for these products.

“Our industry remains with its innovative strength and its sense for consumer wishes a driving force of private consumption. IKW forecasts a plus of 2% for 2018.”

Thomas Keiser, Managing Director IKW



¹The 2017 market figures are based on a projection of IKW based on data of IRI Information Resources GmbH

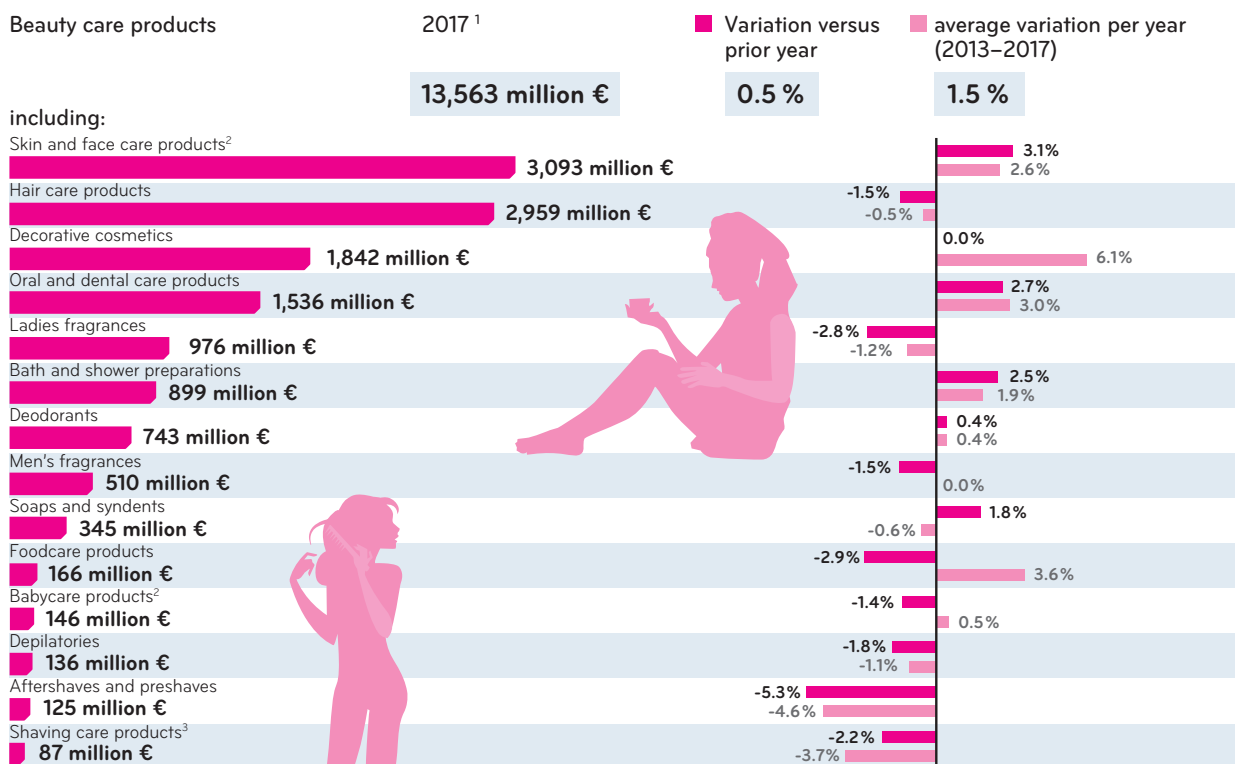
Beauty Care Product Market Germany



The sales value of beauty care products rose in 2017 again, this time by EUR 65 million to a total of EUR 13.6 billion or by 0.5%. The development is based on high-quality market launches. Growth was generated above all in the trade channels drugstores as well as brand discounters.

The leading growth segments were face care, oral care as well as bath and shower preparations.

Beauty care product market grows continuously



Market figures beauty care: Status 6 December 2017

¹ Projection of IKW based on IRI data Jan – Sept 2017 and member information; ² Without shampoos, bath- or shower preparations, soaps; ³ Ladies and Gents; ©IKW



Home Care Product Market

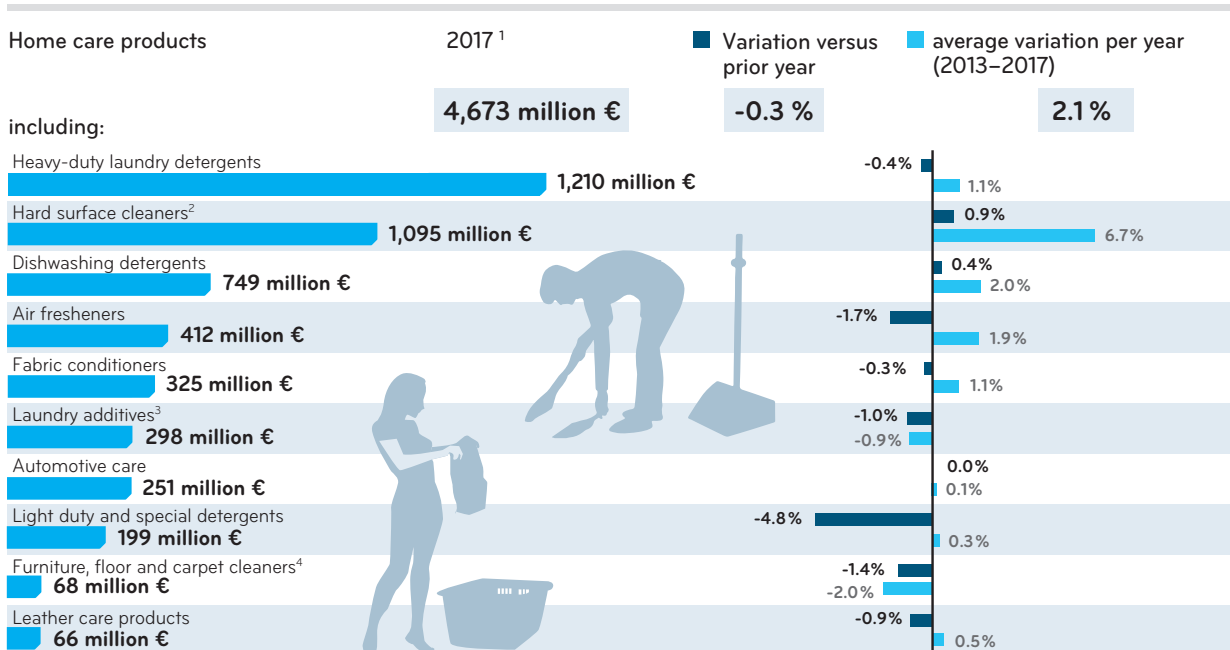
Germany

The total sales revenues of the detergents, cleaning and care products for private households were quite stable at EUR 4.7 billion (-0,3% / -15 million EUR). Main categories are heavy-duty laundry detergents and hard surface cleaners.

Increases were generated in the trade channels drug-stores and brand discounters.



Home care product market with significant growth



Market figures home care: Status 6 December 2017

¹ Projection of IKW based on IRI data Jan – Sept 2017 and member information; ² Bathroom, sanitary, glass, window, household cleaning agents; drain cleaning agents, special cleaning agents (oven, limescale, metal); ³ Stain removers, waterproofing products, pre-wash additives, soaking agents, bleaches, starches, ironing aids, textile dyes and dye removers; WC cleaning agents and stones; ⁴ Cleaning and care agents for floors and stones, furniture and polishes; ©IKW



Market Conditions



Despite political risks, the consumer enthusiasm of the Germans “continues to be unbroken” according to the GfK market researchers.



“The consumption mood of consumers is unbroken. At the same time the quality orientation of consumers has already been increasing for some time. These are good times for strong brands.”

Dr. Robert Kecskes, GfK SE

Private consumption made an essential contribution towards the good economic development.

The IKW member companies secured with high investments into the development of innovations and competition activities once more a stable market growth in beauty and home care.

On the market for beauty care products, drugstores remain by far the most important and increasing sales channel. But also brand discounters are significantly growing. By contrast, the traditional food retail trade and classical discounters are partly losing significantly in importance.



Outlook

The innovations and products which are indispensable in daily use from the industries represented by IKW as well as the positive development of the general consumption climate in Germany are the drivers of trade and industry.

Nonetheless, the business and political communities continue to face major challenges. Both the domestic and the foreign trade must assert themselves in an increasingly turbulent environment. International market foreclosure tendencies, rising inflation and lasting terrorist threats have been overshadowing the consumption climate and the economic development at the beginning of the year.

Domestic demand continues to generate a lot of hope. The foreseeable ongoing low interest rate and the high consumption tendency of the consumers are indications of a positive development.

For Germany as a business location, political circles are facing major tasks: assertiveness in Europe and in the world, solutions of the refugee issue, farsightedness and

a sense of proportion for energy and tax policies will be pivotal, amongst other things, for the continuation of the so-far good economic development in Germany.

IKW anticipates a further intensified competition amongst its member companies which will certainly result again in innovations with relevant added value for consumers. According to the current IKW industry barometer 2/3 of the polled member companies anticipate higher investments and expect a good to very good market development. IKW, therefore, anticipates a market growth of approximately 2%.



WELT

**“2018 will be another boom
year for Germany.”**

Welt.de, 2 January 2018



Interdisciplinary Activities



Medium-sized businesses

Medium-sized businesses have traditionally had a particularly high standing within IKW. The conferences for medium-sized businesses, which are staged twice a year, play a central role for the Association's activities in this field. These conferences deal intensely with the focal issues, which are relevant for medium-sized businesses.

During the conferences interesting speakers present important findings on current business issues. Exciting insights were, for instance, provided recently by Christian Lindner (FDP – Free Democrats), Christoph Werner (dm) or Sascha Lobo (Blogger). Beyond the meetings, IKW offers workshops such as on Category Management and supports members in their foreign business.

“Associations are mediators – between industry, politics, authorities and the public. They therefore make an important contribution to society.”

Christian Lindner, Federal Chairman of the Free Democrats and Chairman of the FDP Faction in the German Bundestag



“IKW supports, advises and represents its members in a very sound manner. This is indispensable for many mid-sized companies given the complex and comprehensive legal situation.”

Heinrich Beckmann, Chairman of the IKW Medium-sized Business Committee, delta pronatura Dr. Krauss & Dr. Beckmann KG



International Business



German Pavilion, Beautyworld Middle East, Dubai, May 2017

IKW has been promoting the international commitment of its member companies through the application for and implementation of foreign trade fairs since the mid 90s. These support, more particularly, the medium-sized businesses in generating growth outside the German boundaries. IKW applies, for instance, for support of the Federal Ministry for Economic Affairs in view of the foreign trade fair attendance of medium-sized member companies outside the European Union. These "German Pavilions" enable the companies to present themselves and their products on individual company stands. The exhibiting companies are integrated into the infrastructure of a German community stand and can promote themselves under the still recognised quality promise "Made in Germany". Furthermore, they benefit from extensive assistance and guidance and a joint information and service point on site. In addition there is a broad portfolio of supporting measures such as press conferences, incentive events for fair goers, audio-visual advertising material, customer

introduction and visits of official German representatives at the trade fair stands. Moreover, online appearances tailored to the respective trade fair are offered for preparation and processing purposes. Exhibitors, journalists and interested professional visitors can continue their exchange under www.german-pavilion.de.

IKW is currently active at the following trade fairs: Beautyworld Middle East in Dubai, China Beauty Expo in Shanghai, Cosmoprof Asia in Hongkong, InterCHARM in Moscow, Cosmoprof North America in Las Vegas, as well as Belleza y Salud in Bogota.

In addition to the trade fair activities, IKW initiates market development measures for prioritised export regions such as Brazil, Japan, Indonesia or Australia in co-operation with the Federal Ministry for Economic Affairs. Furthermore, IKW issues the free sales certificates for the export business.



Press & Press Feedback

The industry represented by IKW is one of the few sectors which publishes an estimate about sales revenues and the market development for the full year during the current year.

These forecasts are supplemented in quantitative and qualitative terms by data of the market research institutes IRI Information Resources and the Society for Consumption Research (GfK). During the business press conference taking place at the end of each year IKW presents these industry forecasts to the public.

Media as mediators of society are an important partner. Apart from the business press conference, IKW offers the press many occasions and impulses on beauty and home

"IKW speaks for an industry with products which accompany people very closely in their everyday life. IKW stands in particular for transparency and readiness to enter into a dialogue. It always argues on the basis of facts. This creates trust."

Gabriele Hässig, Vice President of IKW,
Procter & Gamble Service GmbH



IKW economy press conference, 1 December 2017

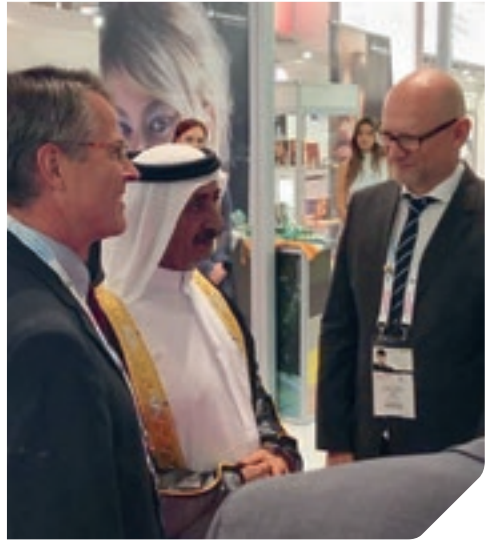
care such as round table discussions and workshops on future trends. Since 2018 IKW has been enhancing its online presence with the twitter channel [@IKW_org](https://twitter.com/IKW_org).

Moreover, the competence partners Beauty Care and Home Care within IKW answer questions on skin and hair care, beauty and self-confidence as well as hygiene and cleaning. With publications in print and online media as well as radio and TV features, IKW generates a significantly broad impact with several hundred millions of contacts per year.



↑ Visit of the Chinese delegation, China Association of Fragrance, Flavour and Cosmetic Industries (CAFFCI), 3 March 2017, Frankfurt am Main

Prospection trip to Brazil, 28 May – 1 June 2017, Sao Paulo; Uwe Heye, Consul General
 ↓ Sao Paulo, Associacao Brasileira de Cosmetologia



Beautyworld Dubai, 14 – 16 May 2017, Dubai; Günter Rauer, Consul General UAE; Sheikh Hasher Al Maktoum; Thomas Keiser, IKW →



Social media workshop with beauty bloggers, 30 August 2017, Frankfurt am Main →



Delegation of Cosmetics Europe visits IKW in Frankfurt on 6 September 2017 ↓



Gesine Meißner (Member of the European Parliament), Georg Held (IKW President, L'Oréal Deutschland GmbH), Gabriele Hässig (Vice President of IKW, Procter & Gamble Service GmbH), Thomas Keiser (IKW Managing Director) →



↑ 15th Players Workshop FORUM WASCHEN, 7 and 8 September 2017, Berlin
 Picture top: panel: from left: Prof. Dr. Dirk Bockmühl, University Rhein-Waal; Dr. Wolfgang Straff, Federal Environmental Agency; Prof. Dr. Christian Thorun, Institute for Consumer Policy – Con-Policy GmbH; Elke Wiczorek, DHB – Network Household; Dr. Philipp Schäfer, Reckitt Benckiser Deutschland GmbH
 ← Picture left: Claudia Bach, Reckitt Benckiser Deutschland GmbH, Heidelberg; Elfi Schuchard, Vocational School Ritterplan, Göttingen; Dr. Thorsten Kessler, IKW; Professor Ulrich Bauer, University for Technology and Economy, Berlin; Dr. Herbert Desel, BfR
 Picture right: Dr. Ulf Jaeckel, Federal Ministry of the Environment, Nature Conservation, Building and Reactor Safety →





Prospection trip Japan, 6–8 November 2017; Dr. Lucas Witoslawski, AHK Japan; Thomas Keiser, IKW; Birgit Ogami, Federal Ministry of Economic Affairs and Energy; Marco Schuldt, German Embassy Tokyo
←

Joint corporate exhibition of the Federal Republic of Germany at COSMOPROF ASIA, 15–17 November 2017, Hong Kong
↓



Discussion event European Sustainability Policy, 6 December 2017, Brussels; Martina Werner, Member of the European Parliament; Thomas Keiser, IKW
→



A.I.S.E. Cleaning and Hygiene Forum, 6 December 2017, Brussels; Commissioner Elzbieta Bienkowska, DG Growth, European Commission
→



← IHK Annual Reception, 6 January 2018, Frankfurt am Main; Thomas Keiser, IKW; Volker Bouffier, Minister President of the Federal State of Hessen
→

IKW/ALB-Workshop, 11 January 2018, Frankfurt am Main; Prof. Dr. Dr. Dr. Hanns Hatt, Ruhr University Bochum
→



Stakeholder Dialogue on Cosmetics, 22–23 January 2018, Frankfurt am Main; Prof. Dr. Gisela Degen, Leibniz Institute for Labour Research at the Technical University of Dortmund
←



↑ ISCC – HPCI 2018 Conference, 31 January 2018, Mumbai, India; Renuka Thergaonkar, ISCC; Birgit Huber, IKW



↑ Seminar on Pitfalls of Statistics, 19 February 2018, Frankfurt am Main; Prof. Dr. Björn Christensen, University of Applied Sciences Kiel

Reception at the European Parliament, 20 February 2018, Brussels
↓



← VCI Parliamentarian Evening, 29 March 2017, Berlin, Hubertus Heil, SPD; Kerstin Andreas, The Greens; Thomas Keiser, IKW



↑ PCPC Annual Meeting, 27 February 2018, Florida, USA

Further Activities

Beyond meetings and international trade fairs, IKW offers its members a broad range of additional services. These include, amongst other things, scientific-technical information events and workshops as well as a comprehensive collection of technical information on the IKW-extranet.

Furthermore, IKW is an appreciated contact and interface between public authorities, consumers, media and industry.

All this leads to a high satisfaction of the member companies within IKW.



Beauty Care



The legal background

Cosmetic products are EU-wide regulated in the EC Cosmetics Regulation. This law contains a lot of requirements for cosmetic products sold in the European Union. The competence partner beauty care within IKW is very much involved in activities on the cosmetics legislation.

The EC Cosmetics Regulation consists of different requirements which have to be fulfilled by each cosmetic product marketed in Germany. Only products which are in conformity with the definition of cosmetic products described here can be assessed and marketed as such. Furthermore the legislation contains an obligation that all cosmetic products available on the market which when used under normal or reasonable foreseeable conditions of use, are safe for human health.

Responsible person

For each cosmetic product placed on the market, a responsible person established within the EU must be designated. This company must be disclosed on the packaging of the products and is responsible for ensuring that only products which are safe for human health are placed on the market. There is no mandatory approval.

Compliance with the legal provisions by the responsible person is subject to verification by the competent surveillance authorities.

In the event of contract manufacturing or imports from countries outside the EU the responsible person indicated on the packaging is responsible for the product vis a vis the legislator and more particularly for the presentation and composition as well as compliance with duties of notification. In the event of imports from third countries it is also necessary to ensure the availability of labelling elements which are relevant for safety on the packaging in German language.

“The cosmetics companies represented within IKW manufacture safe and effective products for consumers – regardless of whether they are natural cosmetics or conventional cosmetics.”

Birgit Huber, Head of Department
Beauty Care within IKW





Cosmetics GMP

Furthermore cosmetics-GMP is requested for manufacturing cosmetic products.

Labelling in German language

Besides these requirements the EC Cosmetics Regulation contains a lot of other regulations such as for nano-materials, CMR substances, notification to the Cosmetic Products notification Portal (CPNP), reporting of the very rare cases of serious undesirable effects, claim substantiation of cosmetic products, positive lists and banned substances and many more. It is of importance to know that the labelling requirements for products sold in Germany have to be in German language. IKW has published an information for producers and distributors of cosmetic products on its website under the following link: www.ikw.org/ikw-english/beauty-care-topics/detail/general-information-for-manufacturers-and-distributors-of-cosmetic-products-in-germany-overview-of/

High level of safety

Cosmetic products have a high level of safety and compatibility. Nevertheless even under correct use, individual intolerances such as minor skin irritations or allergic reactions, can occur. According to a survey done by IKW since 1976, there are only 1,3 cases of health-related intolerances per 1 million sold cosmetic product packages.

Cooperation with other institutions

IKW is also active in collaboration with other institutions in Germany, like dermatologists, pediatricians, consumer associations, hair dressers, beauticians and many more. In regular meetings IKW tries to identify common interests and publish a common position. IKW has commonly published a leaflet on internet sales of cosmetic products.

20 years of safety assessor courses



A success story

How do safety assessors ensure that cosmetic products are safe in terms of health? How are the methods for the scientific assessment of contact allergies to be classified? And – which alternative methods to animal experiments are available for the safety assessment of cosmetic products? These are only a few of the highly complex issues which were presented by renowned experts from Germany and abroad at the scientific symposium “20 years of education for safety assessors”, to which IKW and DGK invited. More than 130 safety assessors accepted the offer to have an interdisciplinary, intense exchange on current issues in the field of safety assessment.

In order for consumers within the EU to be able to rely on cosmetic products being safe, the work of the safety assessors is indispensable. They are the experts who are in charge of safeguarding that cosmetics comply with all demands imposed by legislation. A demanding mission which requires knowledge from different disciplines such as chemistry, toxicology, dermatology and cosmetics law. Regular continuing education which keeps the safety assessor always on the most recent state of science and legislation is a must.



Speakers at the safety assessor symposium*

This work has been performed for 20 years for DGK and IKW with their offering of continuing education courses which are regularly attended by many safety assessors and are completed with a certificate. Birgit Huber, Head of

the Competence Partner Beauty Care within IKW: “We are pleased that the offer of the different course modules has been accepted so well by the safety assessors during the past 20 years, because continuing education in this field is very important. We will continue to work in future on the courses taking place on a very high level and representing a genuine support for the safety assessors.”

“The safety assessor courses provide the indispensable basic knowledge for the competent assessment of the safety of cosmetic products.”

Prof. Dr. Gerhard Eisenbrand, University of Kaiserslautern, Senior Research Professor (retired) and Chairman of the Cosmetics Commission at BfR



IKW and DGK attach a particularly high value to the selection of speakers and ensure that experts from universities, public authorities and industry pass on their expert knowledge to the safety assessors. Concerning the offer of continuing education, it is, moreover, ensured that the contents are practice-oriented and imparted in an intuitively accessible manner. This helps the safety assessors at the implementation in their everyday work. And public authorities appreciate the continuing education events in the same way, since this allows them to judge the work of the safety assessors even better and engage in further education themselves. Another benefit of the events is the direct personal exchange with other colleagues and experts who can help in dealing with issues.

For some time already, the continuing education programme has also been available in English. This means that safety assessors from outside Germany can likewise benefit from the continuing education offering of DGK and IKW.

A video on the Symposium is available (in German only) at: <https://youtu.be/O9gGLFjTghQ>.

*Front row (from left to right):
Dr. Gerd Mildau, Chemical and Veterinary Surveillance Authority, Karlsruhe; **Dr. Andreas Butschke**, Federal Office of Consumer Protection and Food Safety (BVL), Braunschweig; **Prof. Dr. Johannes Geier**, Information Network of Departments of Dermatology (IVDK), University Medical Center, Göttingen; **Prof. Dr. Vera Rogiers**, In vitro Toxicology and Dermato-Cosmetology (IVTD), Vrije Universiteit Brussels; **Dr. Hartmut Schmidt-Lewerkühne**, President DGK e. V., Thannhausen; **Dr. Anke Meisner**, Federal Ministry of Food and Agriculture (BMEL), Berlin; **Britta Klebon**, DGK e. V., Thannhausen; **Dr. Rob Taalman**, Cosmetics Europe, Brussels

Top row (from left to right):
Prof. Dr. Gerhard Eisenbrand, Senior Research Professor (Retired) Food Chemistry & Toxicology; **Prof. Dr. Lothar Motischke (retired)**; **Birgit Huber**, Deputy Director General IKW e. V., Frankfurt am Main; **Dr. Annegret Blume**, The German Federal Institute for Risk Assessment (BfR), Berlin; **Prof. Dr. Walter Sterzel**, University Duisburg-Essen; **Dr. Bart A. Heldreth**, Cosmetic Ingredient Review (CIR), Washington, D.C.

The IKW Youth Studies



Young people are currently struggling with uncertainties – not only due to their unusual mood swings and burgeoning sexuality. On a social and familial level, they likewise experience sort of a loss of control. To counter this uncertain basic feeling, young people try to strengthen their self-confidence and regain control over their own life. To this effect, they develop their very own strategies, which have been decoded by Lönneker & Imdahl rheingold salon on behalf of IKW in two in-depth psychological-representative studies.

Youth Undisguised

A study on the development of self-esteem in adolescents and young adults aged between 14 and 21 years. What role is played by a neat appearance for adolescents and young adults? What influence does taking care of their appearance have on the self-esteem of young people? And in how far can cosmetics and beauty products support young people in their self-discovery? The first in-depth psychological-representative study on the transition to adulthood provides answers to these exciting questions.

Some highlights of the results (read the full study under www.ikw-youthstudy.org)

- Young people prefer to let their appearance “talk”: 73% of the polled young people consider body and beauty care to be “very important” in their life.
- They hope for a more stable life, and at least their appearance should not suggest that their life has had a chaotic course.
- An astonishing insight: According to the study, there is no marked middle range. The young people either experience a lot of uncertainty or a lot of over-protectedness.
- The young people today experience the loss of control on at least two different levels:
 - On the personal level: As a result of puberty itself – and partly as a result of their personal family circumstances.
 - On a cultural and social level – not only insecure political situations, but also too many degrees of social freedom create uncertainties.
- Young people invest much more in their appearance than in the past. Creating an attractive appearance is a good method to get in or take back control.
- The Internet is the primary source for advice on the use of cosmetic products.
- For young people cosmetic products are self-chosen companions in the development of their self-esteem. Products which help to get to grips with the imponderable and uncontrollable are particularly relevant for their self-esteem.

FACTS ABOUT THE STUDY:

Within the framework of the qualitative survey, group discussions and individual in-depth interviews were conducted with altogether 56 adolescents and young adults aged between 14 and 21 years. For the representative quantitative survey 1,012 adolescents and young adults aged between 14 and 21 years were interviewed.



Selfies Undisguised

A study which deals with the phenomenon of selfies and asks why young people take selfies and why a whole generation defines itself through selfies. Why are young people on the one hand embarrassed by selfies and why do they make an enormous effort, on the other hand, for the perfect picture to be created at the end of the day? What is the role played by recognition?

Some highlights of the results (read the full study under www.ikw-youthstudy.org)

- 85% of the young people take selfies. However, only 27% admit that selfies have a central significance for them. The in-depth psychological survey brings the whole truth to light: for most of them, selfie making is first embarrassing. Therefore they reinterpret the pictures by stating "I do not take selfies, these are portraits."
- Selfies serve, as the name suggests, to "find oneself". And self-discovery takes place, in psychological terms, almost always by delimitation from others: from parents, friends or teachers; what counts is to be different from others and to be something special. At the same time the young people want to be part of their group, friends or the community on the internet. They want to align themselves to trends, they know what is hip and want to show it.
- When taking selfies young people want to find on the one hand an individual style and express their personality. At the same time, they know and comply with the secret codes of their generation. They know what is in or out in terms of selfies and delimit themselves from older people.
- The number of likes means a lot for the respondents: likes and comments even enhance the own narcissism and become motivators for even more selfies.
- A selfie records a moment for later – one wants to remember the alleged experience. Many young people no longer dare to deal with the immediate happenings. 66% appreciate in particular that through the subsequent viewing of their selfies they



actually realise what they experienced. When looking at the selfies, one does not remember the actual experience but what one would have liked to experience. Young people can define through selfies what they want to experience and how they want to be.

- Control and ideal self-portrayal are the main motives for selfie making. Here young people experience themselves as the sole authors of their life.
- Before a selfie is posted, it must be perfect. Nothing is left to chance. It is paradoxical to observe that naturalness is desired by boys and girls – but is first constructed in a sophisticated process by styling and makeup.

FACTS ABOUT THE STUDY:

An in-depth psychological-representative study during which a total of 20 young people aged between 14 and 21 years disclose their attitudes and views concerning selfies in face-to-face interviews. In a representative quantitative survey 1,000 adolescents and young adults aged between 14 and 21 years were interviewed online.



Home Care



Public Relations

As an offer for journalists, the Home Care department drafts press releases and informs through annual visits to editorial offices and a regular newsletter about the proper application of detergents, care and cleaning products and about their ingredients. In 2016 the reach of the articles in printed media as well as the radio and television contributions referring to the IKW Home Care department amounted to 262 million contacts.

The new power of cleaning – New appreciation of an often underestimated activity

Today, cleaning is far more than the tiresome necessity to get rid of dirt in one's home. This is shown by an in-depth psychological-representative study published by IKW: "The New Power of Cleaning". This IKW study (performed by rheingold salon) on the psychology of home care explains what cleaning, wiping etc really mean to people.

Qualitative questions were put in group discussions and individual in-depth interviews to 36 persons in Cologne, Stuttgart and Rostock; the respondents were between 25 and 55 years of age. Representative quantitative questioning in an online panel comprised ca. 1,000 persons aged 18 and over.

Those who clean remove dirt and dust from surfaces and restore order in their own four walls. But beyond the seemingly necessary evil of getting one's home back in shape, also psychological motives have a major role.

The IKW study on psychology in home care "The New Power of Cleaning" highlights today's importance of wiping, hoovering and tidying, and it identifies 5 different cleaning types.

The importance of cleaning

At the present time, many people feel that their everyday routine makes overly strong demands on them. The world around them appears to be uncertain and complex. The multitude of development options in both the private and professional sphere exerts further pressure on people who fear that they might be missing out on something or

"Bringing about cleanliness is today more important than it has been in a long time. Cleaning helps people today in coping physically and psychologically with a stressful and complex everyday life. In this sense cleaning often involves a feeling of power versus powerlessness and overstraining. It is hence possible to talk about a new power of cleaning."

Jens Lönneker, Director of Studies and Managing
Director of rheingold salon



could make the wrong decisions. This increases the longing for a "safe harbour": 80% of respondents state that their home has become ever more important for them over the past years. Retreating in their own four walls also upgrades the activity of cleaning: Cleaning and tidying

create their own familiar environment for people – an environment that they are missing outside their homes. 55% of respondents describe how a clean and neat living space gives them the feeling of having a better grasp on daily life. Therefore, cleaning has clearly gained in significance, with a perfectly new appreciation.

Today's results are also interesting when looking back at the study on cleaning that IKW carried out back in 1996. For example, the number of those who agree with the statement "It is important to me that everything is always spick and span" has risen clearly. By contrast, the number of those who accept the statement "Housework is a necessary evil. One should get over and done with it as quickly as possible." has gone up only slightly.

Bernd Glassl (head of the IKW home care department) comments the results from 1996 and today: "We wanted to know what has changed over the past 20 years in the attitudes vis-à-vis cleaning and home care. It is remarkable that meanwhile cleaning no longer solely serves its very purpose, namely, getting things clean. Beyond that, cleaning also gives security to many people and makes it easier for them to manage everyday life."

The cleaning types

Irrespective of the individual attitude and approach towards the topic of "cleaning", the study results identify 5 different cleaning types who handle this power in very different ways.

Perfectionists love absolute cleanness and neatness. All dirt needs to be removed immediately after it forms. Persons of this type try to control themselves and their lives through particularly perfect cleaning. 35% of respondents are perfectionists.

Concealers prefer order in places that are visible for all. Obvious mess and dirt must be removed, but the cleaning effort should be kept as low as possible. With their cleaning behaviour the concealers show that they have control over their lives. 24% of study participants are concealers.

Rulers think that nobody cleans better than they themselves, also where cleaning is delegated to others. They only accept their own views on cleanness. 17% of respondents resemble the cleaning type of the ruler.

Hedonists are very relaxed about the topic of "cleaning" and make their highly individual decisions on what is clean. This is also reflected by the fact that persons of this cleaning type tend to develop their very own order systems. 15% of study participants are hedonists.

Persons resembling the cleaning type of *controller* could also be called the secret rulers. They, too, believe that they are the only ones who know how to clean properly. But unlike the rulers, controllers present themselves to the outside world as servants who do all of the cleaning work. However, they reserve for themselves the control over cleaning and cleanness. 10% of the respondent men and women are the controller type.



Product Safety

The Home Care department of IKW has been conducting surveys since 2007, asking its member companies (selling detergents and maintenance products to private consumers in Germany) about registered intolerances. 17.8 billion packages were sold in the period

from 2006 to 2016. The case data was registered as shown in the chart below. The numbers reflect the high safety level of detergents, care and cleaning agents for private consumers.

allergies	total number of cases from 2006 to 2016	number of cases per 1 billion sold packages
Inquiries by Doctors	47	3
Medically confirmed	29	2

skin irritations	total number of cases from 2006 to 2016	number of cases per 1 billion sold packages
Described plausibly by the consumer	4.946	278
Medically confirmed	127	7

Sustainability

FORUM WASCHEN

The dialogue platform FORUM WASCHEN (Forum Washing) has originated from a sustainability initiative of IKW, taken in 2001. The patron of the Action Day 2018 is Prof. Dr. Günther Bachmann, Secretary General of the German Council for Sustainable Development. He writes



Prof. Dr. Günther Bachmann, Secretary General
of the German Council for Sustainable Development

“As far as FORUM WASCHEN is concerned, I appreciate the high expert knowledge of the individual players and the interdisciplinary co-operation. I am pleased to pass on the current knowledge on sustainable laundry care to the students of clothing engineering at HTW Berlin.”

Professor Monika Fuchs, University for
Technology and Economy (HWT), Berlin



in the greetings, amongst other things: “... Especially in the past few years both large and small companies placed excellent innovations on the markets. This is encouraging. We need to continue along this path. Dialog platforms such as the FORUM WASCHEN are indispensable for a critical exchange and mutual learning. They must turn sustainability into the new normal.”





FORUM WASCHEN has a total of 39 stakeholders including public authorities and ministries, professional organisations, industry, environmental and consumer associations, universities, institutes and schools from Germany, see: www.forum-waschen.de. The IKW Home Care department acts as a co-ordination office for FORUM WASCHEN.

FORUM WASCHEN has organised an annual action day on sustainable washing(up) on 10 May since 2004. Every year up to 200 activities are deployed throughout Germany. The goal of the action day is to motivate consumers and pupils through opinion leaders to support more sustainability in washing(up).

The platform www.waschtipps.de initiated in 2016 for

waschtipps.de

teenagers and young adults has been supplemented by contributions for specific target groups in the blogging area: "washing fabric shoes", "cleaning bikes", "washing functional clothing", "cleaning keyboards", "cleaning records", "washing base caps", "smartphone and tablet", "what belongs where in the detergent compartment in the washing machine?". Female students of the University of Fulda have produced four short "rinsing films" within the framework of a student research project which cover dishwashing with a wink to draw attention to the website [waschtipps.de](http://www.waschtipps.de). These short films are also understandable without speaking German and are published on www.waschtipps.de under "Videos".

Technical Topics

IKW Recommendations for the Quality Assessment of Detergents and Maintenance Products



"The productive co-operation of the manufacturers of cleaning products and test institutes has resulted in the development of a consumer relevant and reproducible test method for the quality assessment of power degreasers."

Anke Ophüls, wfk Institute for Applied Research GmbH, Krefeld

In November 2017 a working group for sustainability criteria for detergents, cleaning and care products was set up. It is to elaborate a generally intelligible compilation and description of central sustainability criteria for detergents, cleaning and care products for private use which can then be used by external stakeholders (e. g. trading companies, test institutes).

The recommendations on the quality assessment (EQ) of power degreasers were submitted to the SOFW Journal for publication in December 2017. Moreover, the working groups EQ car paint care products and EQ glass cleaners were active. The current recommendations on the quality assessment and safety assessment of detergents, cleaning and care products may be called up on the IKW web page www.haushaltspflege.org under Topics / Information for Manufacturers.

Legal Regulations



Submission of data of mixtures classified as hazardous

Formulas of mixtures which are classified as hazardous due to their health or physical properties and are intended for private consumers must be notified according to the current status no later than by 1 January 2020 to the national authorities of the member states of the European Union (EU) in which these mixtures are on the market.

The new Annex VIII to the Regulation (EC) No. 1272/2008 on Classification, Labelling and Packaging of Substances and Mixtures describes the data requirements. Although the cost benefit assessment for the new Regulation had been carried out on the basis of the proposal from 2015 and the adopted legal text deviates in essential points from this proposal, the European Commission referred in the Regulation to these obsolete results. A tight majority of the member states, including Germany, did not, however, adopt this proposal. Since the actual effort for the notification by manufacturers of detergents and cleaning agents, amongst others, but also for poison centres is significantly higher than assumed in 2015, IKW pushes for an amendment of the Regulation.

In the working group of the European Chemicals Agency (ECHA) on product categorisation IKW represents both the international detergents and cleaning products association (A.I.S.E., Brussels) and the German Chemical Industry Association (VCI), the Federation of German Industries (BDI). In other ECHA working groups the electronic notification form is defined and guidelines for notifications are elaborated. Since the two projects have not yet been completed but a technical implementation may only be carried out in the companies once the format will have been completed, IKW points out to the competent authorities that the time available for the preparation and implementation is extremely short and a postponement of the deadline would be appropriate.

REACH Regulation (EC) no. 1907/2006

In accordance with the REACH Regulation (EC) no. 1907/2006 concerning the registration, evaluation, authorisation and restriction of chemicals, the last registration deadline for pre-registered substances of the tonnage range from 1 to less than 100 tons per year expires on 1 June 2018.

Substances which are manufactured as such or in mixtures within the European Union (EU) or are imported into the EU, e. g. from Switzerland, must be registered. Manufacturers and/or importers of the substances are subject to registration. Some substances and groups of substances, such as polymers and those listed in the Annexes IV and V of the REACH Regulation, are exempted from the pre-registered substances which were not registered by a substance manufacturer or importer but were made available before the end of the registration deadline of 1 June 2018 to the downstream user may be placed on the market by downstream users (e. g. formulators of cosmetic products or detergents, cleaning and care products) even after the end of the registration deadline on 1 June 2018 without quantitative restriction as such or in mixtures and/or products.

If the downstream user wants to import a substance subject to registration which was not pre-registered as such or in a mixture from one ton per year onwards after 1 June 2018, he acts as an importer and must register himself before the first import. In this case registration is preceded in accordance with Article 26 by an obligation to obtain information from the European Chemicals Agency (ECHA) whether a substance has already been registered. For the manufacturing or import of a substance below one ton no registration is necessary.

The IKW department Home Care informs regularly about updates and participates both nationally and internationally in discussions on REACH. IKW member companies can rely on a comprehensive "IKW/IHO Guidance on REACH" as well as the "Information on the Safety Datasheet in accordance with the REACH Regulation".

50 YEARS IKW

BEAUTIFUL.LIFE.

1968 – 2018: 50 years of IKW

The foundation of IKW was the result of a merger of the predecessor associations, the Association of German Soap Producers and the Association of the Toiletry Industry.

The founding meeting of IKW took place in Frankfurt on **6 December 1968**. On that day 106 companies became members and work began immediately and without any discernible difficulties.

In **1975** a joint office was created together with the Association of Hairdresser Products (IVF) Supplies and IKW increased its activities in the field of professional hair care.



In **1985** IKW took over the product group hygiene paper products and in **1994** it merged with the Household and Maintenance Products Association (IPP).

In **1996** IKW set up a joint office with the German Aerosol Association (IGA) and took over the association support for the hairdressing supplies in **2009** after the dissolution of the Association of Hairdresser Products.

In **2011** the last major revision of the corporate identity took place with the renaming of the departments of "Toiletries" into "Beauty Care" and "Detergents, Cleaning and Care Products" into "Home Care".





In the member survey conducted in **2015** the companies were very satisfied with the Association's work and rated it on average with 1.6 as "very good".

In **2017** the success of the professional work was, moreover, documented by some international accolades – including "Association Award Finalist" in several categories and the nomination for "Association Success Story".

Since **2016** IKW has continuously invested into the digitalisation of communication processes and into its IT infrastructure. With the twitter channel [@IKW_org](#) the Association has enhanced its online presence through up-to-date and direct communication with the peer groups since **2018**.

The original 106 member companies have at present increased to **420 IKW members** – and the development tendency continues to be positive.

The foundation declaration stated already in **1968**:
"The Association considers that one of its main tasks consists in providing its member companies with the best possible prerequisites to seizing their opportunities on the large European market."



Chronology of IKW

Foundation of IKW with 106 member companies as a merger of the "Association of German Soap Producers" and the "Association of the Toiletry Industry"



IKW becomes a member of the **German Chemical Industry Association (VCI)**



Joint office with the **Association of Hairdresser Products (IVF)**

Setting up of the **Hygiene Paper Products** department



1968 1969

1975

1985



1969

The first human being sets foot on the surface of the moon



1974

Germany wins the Football World Cup in its own country



1989

Fall of the Berlin Wall and beginning of the reunification of the divided Germany



Merger with the **Household and Maintenance Products Association (IPP)**

Joint office with the **German Aerosol Association (IGA)**



Merger with the **Association of Hairdresser Products (IVF)**

New **corporate identity** and renaming of the specialist areas into **Beauty Care** and **Home Care**



IKW celebrates its 50th anniversary

1994

1996

2009

2011

2018



1990

The first mobile phones are launched

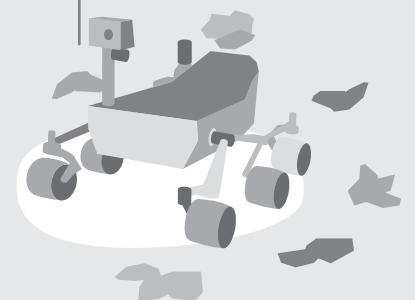
2002

Introduction of the Euro in Germany and another 13 EU member states



2012

The Mars rover Curiosity lands on Mars



Greetings for the 50th anniversary

"In the beauty care and detergent industry there are mainly mid-sized companies. The industry is with sales revenues of more than EUR 18 billion and 50,000 jobs an important pillar of the German economy. IKW has represented the interests of the beauty care and detergent industry in an exemplary manner for now 50 years.

IKW has always been an expert interlocutor for the Federal Ministry of Economic Affairs. This concerns, for instance, the staging of trade fairs abroad or the organisation of exploration trips. I would like to thank your Association for its support and congratulate you on your anniversary. The companies of your industry will need this commitment in future, too, to be able to successfully cope with the rapid changes in the industry. I wish you a lot of success and the best of luck for the future."

Brigitte Zypries, Former Federal Minister for Economic Affairs and Energy, Berlin



"50 years of IKW, that's 50 years of commitment for the industry but also for the consumers. BfR regards IKW as a competent partner who contributes with its activities to a large extent to the de-emotionalization of the industry debate and the improvement of consumer protection. Congratulations!"

Prof. Dr. Dr. Andreas Hensel,
President of the Federal Institute for Risk Assessment (BfR), Berlin

"I appreciate IKW for its strategic commitment to more sustainability in the industry. Congratulations and all my encouragement to continue on the path towards the German sustainability code in an ambitious and successful manner."

Prof. Dr. Günther Bachmann,
Secretary General of the German Council for Sustainable Development, Berlin





"I congratulate the German Cosmetic, Toiletry, Perfumery and Detergent Association on its 50th anniversary. It has been a pleasure to talk at your SME meeting in fall 2017 about the relevance of competition law for mid-sized companies. I am pleased if associations contribute through events of this kind towards strengthening the awareness of cartel law."

Andreas Mundt, President of the Federal Cartel Office
(Bundeskartellamt), Bonn

"IKW has made a major contribution towards the dialogue between the different stakeholders for many years. Congratulations on your 50th anniversary."

Klaus Müller, Member of the Board of Verbraucherzentrale Bundesverband e.V. (vzbv), Berlin



"IKW offers its members important information on economic topics. I am pleased to remember my attendance of your SME meeting. Congratulations on your anniversary."

Professor Dr. Gabriel J. Felbermayr, Director, ifo Institute –
Leibniz Institute for Economic Research at the University of Munich

"IKW defends in an exemplary manner the interests of its industry. With the necessary farsightedness the Association deals with changing framework conditions. Congratulations on your anniversary. I will be pleased to come back to your SME meeting."

Petra Schäfer, Managing Director of Globus
SB-Warenhaus Holding GmbH & Co. KG, St. Wendel



Gender Shift
Silver Society
Connectivity
Individualisation

Neo-Ecology

New
Work

IKW Future Study
BEAUTIFUL.LIFE.

Taking care of one's body and feeling beautiful is a natural need. And Home Care is part and parcel of our everyday life. Will this change in future?

What will products look like with which we will take care of ourselves and our homes in future and what trends will persist over the next years? The zukunftsInstitut researched on behalf of IKW the change which will apply to our needs, lifestyles and ambitions and the impact this will have on the future of beauty and home care.

The new beautiful

The trend study shows that beauty care will be exposed to two strong and contrasting trends in future. Whether the trend to increasing perfection will be strengthened or whether individuality and authenticity will make their way, is investigated by the study in the same way as the role of digitalisation and demographic change. All changes are placed into a context with the major megatrends of our times and show the direction in which cosmetics will develop during the next 50 years.





The new clean

The trend study identifies potentials of future changes in the household and provides an outlook on how the reach of technology in everyday life and the change in gender roles will mark this development. What is the relevance of smart homes, apps and machines? What will in future also be a "man's affair"? What does this mean

for the products around home care? The study provides surprising answers to these questions and redefines the significance of homecare as part of the quality of living.

The study is published under www.ikw-zukunftsstudie.org
English translations of the summaries are available.





Europe

„Quo vadis, Europe?“

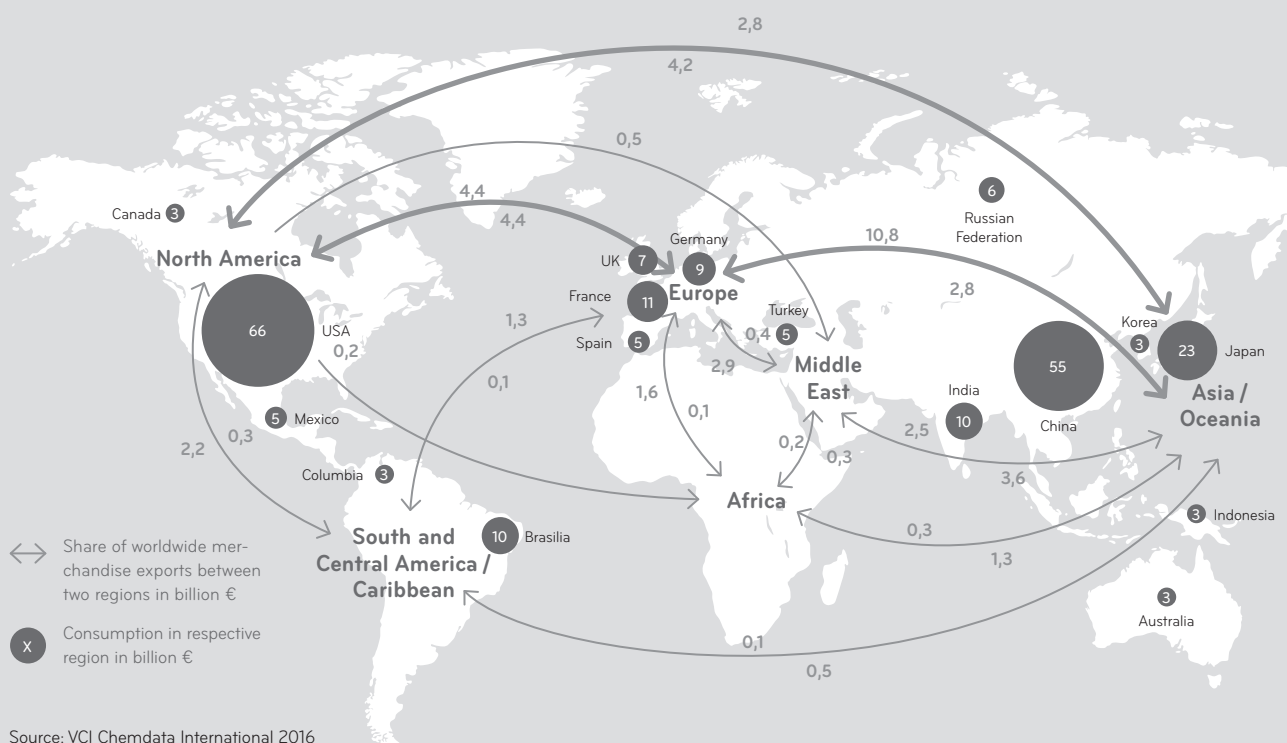
The IKW member companies are confronted in an increasingly globalised world with constantly stronger international turbulences. Europe is located in the centre of the worldwide trade flows. Everything is networked with everything else.

The decisive factors for a positive development will be the rapid solution of the major political crises and the consideration of the need for international co-operation. In this connection the important questions on economic framework conditions must be focused on and solved, and the extreme networking of the world economy must be taken into account.

The challenges have been increasingly escalating during the past years: Separation tendencies in the USA and the UK, power politics in Russia and Turkey, nationalisation trends in Poland and other European countries, in addition to the challenges in respect of economic growth, refugee issues and terrorist threats.

With a market volume of more than EUR 100 billion Europe is the world's largest market for beauty and home care products and hence has sales revenues which are approximately on the same level as the USA and China together. According to the most recent socio-economic studies, the beauty and home care industry in Europe

Worldwide markets: Europe is the heart of export business



Source: VCI Chemdata International 2016

BEAUTY AND HOME CARE MAKE A HIGH CONTRIBUTION TOWARDS PROSPERITY IN EUROPE



Source: Studies by A I S F and Cosmetics Europe 2016

generates a gross added value – a contribution to prosperity – of **EUR 54 billion** per year.

In most countries it stands for sound growth, more than **5,000** production plants and approximately **2.4 million** associated jobs and hence makes an enormous contribution to better living conditions for the Europeans. Within Europe, Germany is by far the largest market, followed by the United Kingdom, France, Italy and Spain.

The acceptance by the consumers clearly reflects their trust in the products and results in high and growing per capita spending.

Justifying this trust and securing it on a European level will continue to be the remit of IKW.

Reception at the European Parliament



“Parliamentary receptions are important for us as politicians to understand how society works and how consumers change their purchasing behaviour. Politics must then create the appropriate framework conditions.”

Gesine Meißner, Member of the European Parliament

By invitation of Gesine Meißner, Member of the European Parliament, the IKW reception at the European Parliament took place on 20 February 2018 under the title “Beautiful & Clean”. It was attended by representatives of the European Parliament, the EU Commission as well as representatives of the Federal States, the IKW board and the IKW office. The experts of the Institute Lön-

neker & Imdahl rheingold salon presented the results of the studies initiated by IKW during the last two years, “Youth Undisguised” and “The New Power of Cleaning”. The lively concluding discussion and a lot of positive feedback testified to the success of the Reception.



Gesine Meißner (Member of the European Parliament), Georg Held (IKW President, L'Oréal Deutschland GmbH), Gabriele Hässig (Vice President of IKW, Procter & Gamble Service GmbH), Thomas Keiser (IKW Managing Director)

Our Activities in Europe



IKW, therefore, cooperates intensely with its European sister associations, A.I.S.E. and Cosmetics Europe, in order to channel the implementation of necessary regulations and the associated high costs for the member companies, their customers and consumers.

During the reporting period, the focus was on the European recommendation by Cosmetics Europe to replace solid plastic particles in products which can be rinsed off (such as peelings) by alternative substances. The amounts of solid non-degradable plastics particles which are used in rinse-off cosmetic products because of their cleaning and peeling effect, has been reduced by 97% between 2012 and 2017. This has been shown by a survey published by Cosmetics Europe in May 2018.

An example which shows that voluntary agreements are effective and that there is not always a need for legislation.

In the field of home care, the "Better Regulation" initiative of the European Commission is an important topic. Within the framework of this project it is to be reviewed, amongst other things, whether the planned goals can be reached efficiently by means of chemicals legislation.

A.I.S.E. and IKW believe that, more particularly, in respect of the labelling of substances and mixtures according to the Globally Harmonised System (GHS) there is a need for improvement since some labelling elements are not helpful for private consumers. A restriction to the essen-

tial information for a safe handling of detergents, care and cleaning agents (such as "Keep out of reach of children") would make sense.

The activities of IKW contribute through high competency, transparency and openness to dialogue towards beauty and home care being considered amongst the most responsible industries in the world, according to the renowned oekom institute.





List of Members



Members

A

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Association Internationale de la Savonnerie, de
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