

The German Cosmetic, Toiletry,  
Perfumery and Detergent Association



# Annual Report

## 2014. 2015





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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 400 small, mid-sized and large companies from the fields of beauty and home care with approximately 500,000 associated jobs, which cover with a sales value of almost EUR 17 billion approximately 95 % 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.

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## Dear Madam, Dear Sir,



Germany is shopping. Whereas the distinct consumer enthusiasm resulted already last year in a significant increase in sales value at the check-outs, the retailers expect an ongoing strong shopping mood and corresponding further growth for 2015, too. At any rate, the consumption climate reached historic highs during the first months of the year. The reasons underlying this positive development are many-faceted. There is above all a good labour market situation with an associated purchasing power of consumers in conjunction with low inflation and minimum interests on savings.

Private domestic consumption is at present, in addition to the traditionally strong German export business, the most important economic pillar. And what had been observed during previous years, has continued: beauty care and home care products are an important component of consumer demand.

The statistics compiled by IKW document growth in both areas. For beauty care products the growth in sales value amounted to 1.6% in 2014, whilst home care products increased by 0.8%. Beauty care ensured particularly brilliant financial results for the retail trade. According to the German Confederation of Retailers HDE\*, the product category "cosmetics and body care products" recorded the strongest growth rate compared to all other categories of the assortments.

An attractive personal appearance and a neat and tidy, cosy home have always been essential features of a high quality of living. In my opinion, the importance of these two aspects has even increased. This is not only proven by the keen demand for the products of our member companies. It is also reflected by media phenomena such as the big success of young bloggers who reach an audience of millions with the cinematic staging of their personal fashion and styling tips on platforms such as YouTube, the boom of TV cooking shows or the record circulation of lifestyle magazines.

Sociologists and opinion pollsters confirm that taking pleasure in a good appearance or comfortable living cannot be equated to unconditional hedonism. The contrary is the case: a broad stratum of consumers is strongly oriented towards the values of sustainability, such as environmental protection or fair working conditions. However, the same consumers are not at all unworldly moralists or even ascetics. They want to enjoy. They want success. And they want to be attractive and live their individuality. The market research company GfK refers to this new middle-class of currently 20 to 39-year-olds as "responsible stagers".

The member companies of IKW fulfil the wishes of these consumers with high-quality and effective products. Thanks to considerable research expenditure, the companies, moreover, succeed in continuously offering innovative products which meet consumer needs even better. Let me only refer to the example of concentrated detergents, which in addition to the pure product performance, make a considerable contribution towards reducing the packaging and transport expenditure and hence save energy.

\* Source: HDE German Confederation of Retailers,  
General economic information, January 2015

However, for entrepreneurial success it is no longer sufficient to manufacture and market good products. The young, responsible clientele takes its purchasing decisions also on the basis of value orientation and the communication skills of companies or brands. Social media provide them today with all the possibilities to communicate directly with the product suppliers. They ask, for instance, for clarification about ingredients, information on environmental sustainability, production conditions or applications without any harmful impact on health. IKW supports its member companies in many different ways in this field.

During the past year it was again confirmed how important not only a company's own but an industrywide communication on product safety and environmental protection is. IKW was able to distinguish itself as a reliable contact partner and provider of factually well substantiated information – such as contributions to debates or lectures. The objective of IKW communication is to counter a feeling of uncertainty which time and again results from campaigns of public players with a corresponding sensationalist media accompaniment.

The information and messages of IKW target primarily institutions such as associations, public authorities, ministries, political parties, non-governmental organisations and the media. However, this does not exclude that IKW replies also to questions of interested consumers. The website of the Competence Partners Beauty Care and Home Care embody this transparency in the same way as the commitment of IKW to the Dialogue on Cosmetics and the Washing Forum.

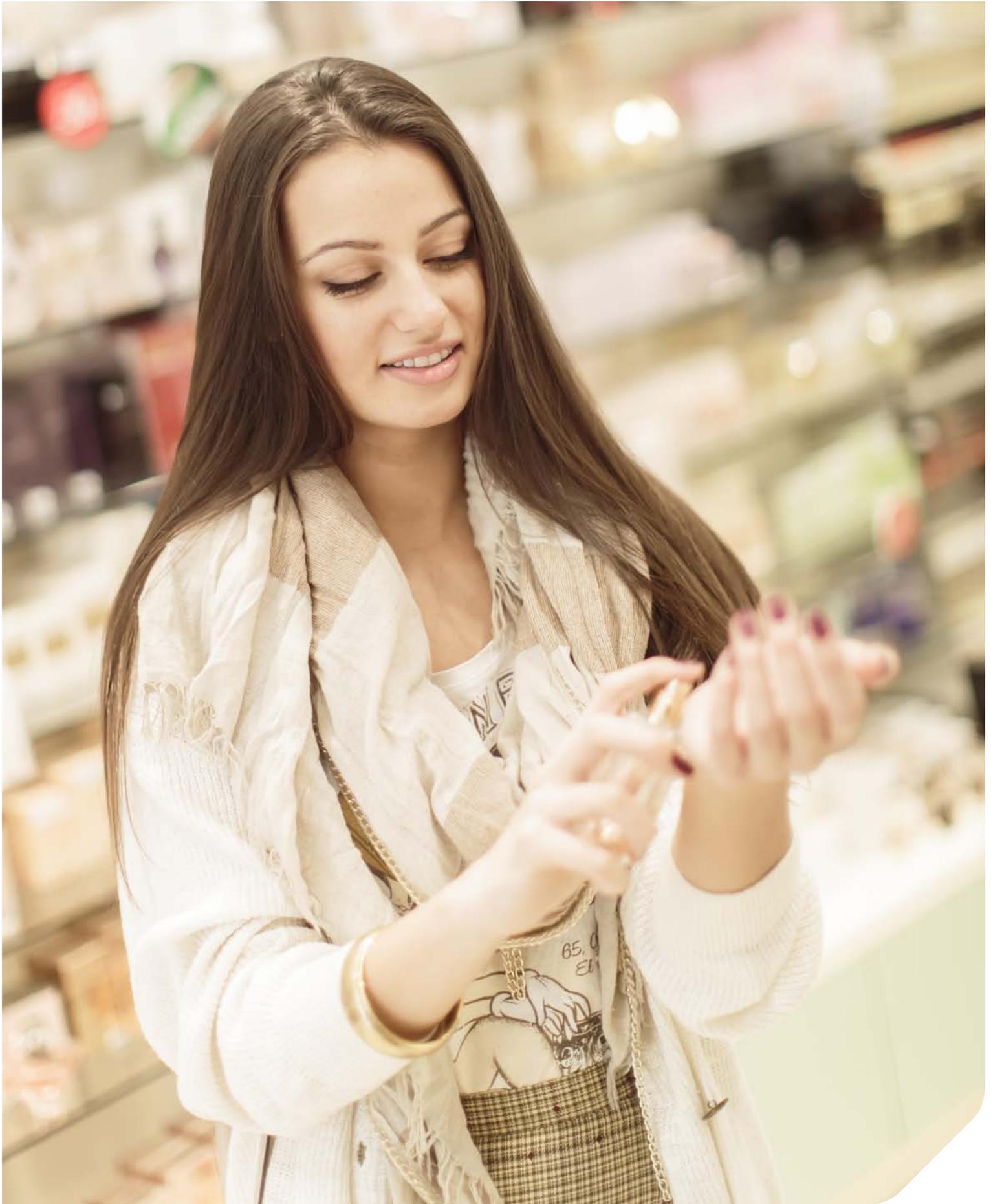
Nobody can buy trust. Trust is only borrowed. And, therefore, the manufacturers of beauty care and home care products must prove everyday anew that consumers can rely without worrying about the efficacy, safety and sustainability of the products. On this basis the high emotional added value, which is so typical for many of our products, can be fully deployed. We were quite successful in doing so in 2014. And there is every indication that we will succeed in the same way in 2015.

Yours sincerely



Dr. Rüdiger Mittendorff

Chairman of the Executive Board  
German Cosmetic, Toiletry, Perfumery and  
Detergent Association

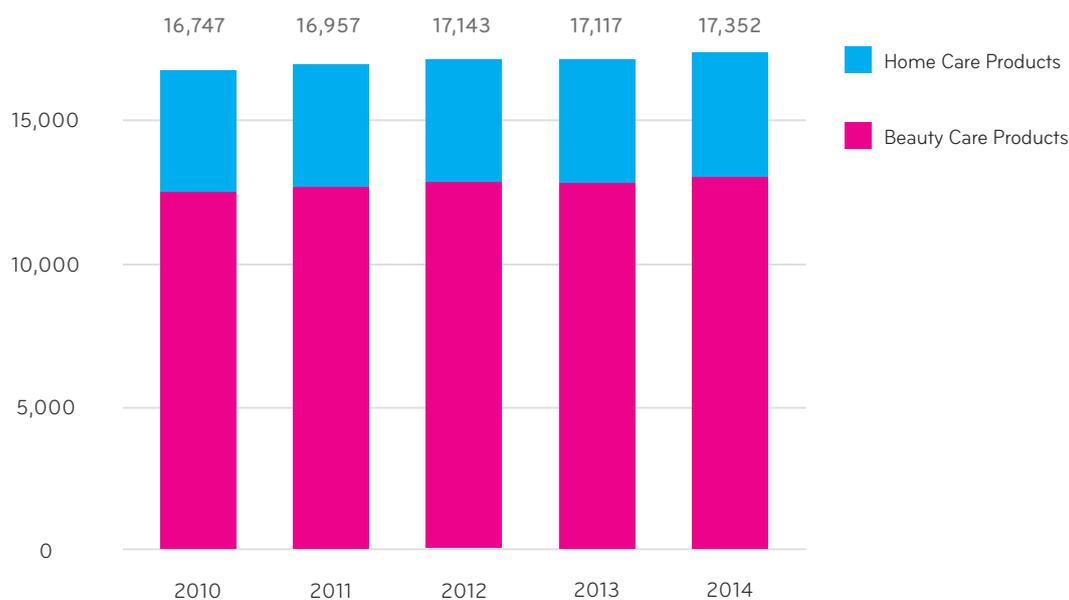


The member companies of the German Cosmetic, Toiletry, Perfumery and Detergent Association (IKW) are close to consumers, and consumer needs and the improvement of wellbeing take centre stage in their activities. In this connection beauty care products help people to look good and stay healthy. Home care products support the cleaning and care of homes, clothes, shoes and vehicles and contribute towards not only preserving their value but also an atmosphere of wellbeing and health. What is more: body care products and detergents "fulfil dreams, bolster people up and ensure recognition and self-consciousness", as a recognised market researcher recently stressed at an IKW press conference.

As a result of professional market development by our members, the products of the beauty care and home care industry constitute an important pillar of private consumption in Germany. In 2014 the sales value rose altogether by 1.4 % to EUR 17.4 billion. Beauty care products rose by 1.6 % and home care products by 0.8 %. Both product categories were again important drivers of domestic demand, whilst relevant other categories such as foods were declining. Every eighth Euro<sup>1</sup> is at present spent in the German food retail trade on beauty and home care products.

#### TOTAL MARKET BEAUTY CARE AND HOME CARE PRODUCTS IN GERMANY 2010 – 2014

in million € at retail sales prices



<sup>1</sup> Source: Information Resources GmbH

Please note: The 2014 market figures are based on a projection by IKW on the basis of data of Information Resources GmbH for January to September 2014.

## Beauty Care Product Market Germany 2014

The sales value of beauty care products rose in 2014 by EUR 201 million to a total of EUR 13 billion; this corresponds to an increase by 1.6 %. The development is based on a significant rise in per capita spending to EUR 148<sup>1</sup>, mainly attributable to high-quality market launches. A large part of the growth was generated in drug stores.

### 1. HAIRCARE PRODUCTS

With a total sales value of EUR 3 billion, haircare products account for approximately one-fourth of the beauty care market and continue hence to be the largest category of goods. With a growth rate of 0.8 % this category was able to increase again slightly – albeit below average – despite the ongoing strong competitive pressure.

### 2. SKIN AND FACE CARE PRODUCTS

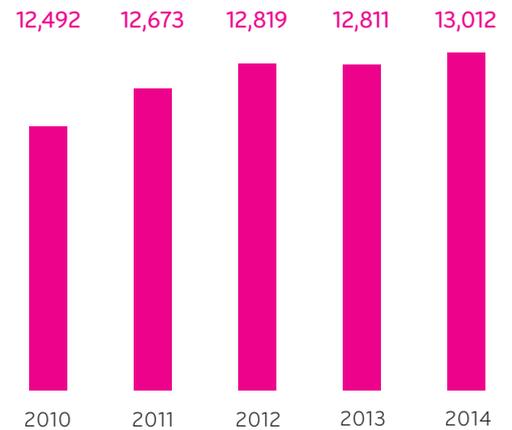
With a market share of more than one-fifth, skin and face care products represent the second largest sub-market in beauty care. They likewise developed with a slightly below-average increase of 0.9 % to EUR 2.8 billion.

### 3. DECORATIVE COSMETICS

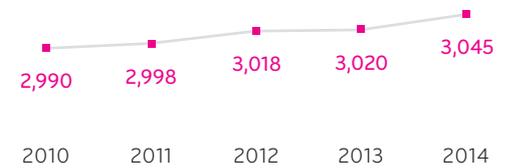
With 12 % of the overall market and a growth of 5.5 % to EUR 1.6 billion, decorative cosmetics were able to further develop their position as third largest segment. The sales value increased by EUR 82 million, supported by attractive offers for consumers, in particular in drug stores.

## OVERALL MARKET INCREASES

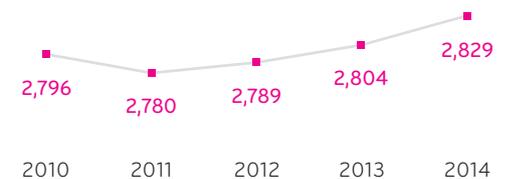
in million € at retail sales prices



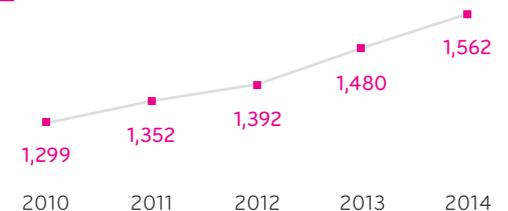
1 HAIRCARE PRODUCTS in million €



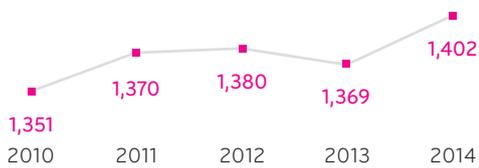
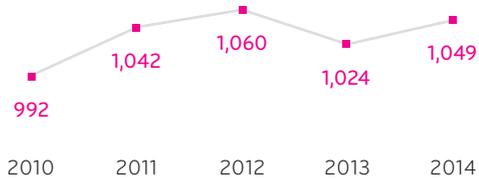
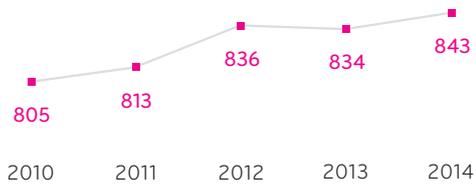
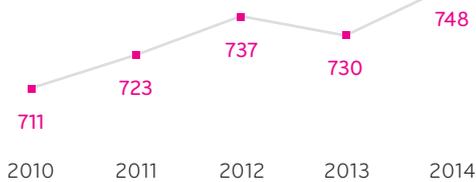
2 SKIN AND FACE CARE PRODUCTS in million €



3 DECORATIVE COSMETICS in million €



1 Source: Information Resources GmbH

**4 ORAL AND DENTAL CARE PRODUCTS** in million €**5 LADIES FRAGRANCES** in million €**6 BATH AND SHOWER PREPARATIONS** in million €**7 DEODORANTS** in million €**8 MEN'S FRAGRANCES** in million €**4. ORAL AND DENTAL CARE PRODUCTS**

With a market share of slightly more than one-tenth, oral and dental care products represent the fourth largest segment. With a growth rate of 2.4% they had a more positive development than the overall market despite – or maybe because of – falling promotion shares. Supported by higher priced launches, they rose by EUR 33 million to EUR 1.4 billion.

**5. LADIES FRAGRANCES**

With a sales value of more than EUR 1 billion, ladies fragrances represent more than 8% of the overall market. In 2014, too, the trend towards higher value brand and luxury products remained unchanged.

**6. BATH AND SHOWER PREPARATIONS**

The market for bath and shower preparations grew by 1.1% to EUR 843 million.

**7. DEODORANTS**

Deodorants rose by 2.5% and EUR 18 million to a total sales value of now EUR 748 million.

**8. MEN'S FRAGRANCES**

The market for men's fragrances continues to be based primarily on established brands and increased by 0.2% to EUR 512 million.

### 9. SOAPS AND SYNDETS

The market segment soaps and syndets was not able to maintain its prior year level. It dropped by EUR 4 million to EUR 350 million in 2014.

### 10. SHAVING CARE PRODUCTS, AFTERSHAVES AND PRESHAVES

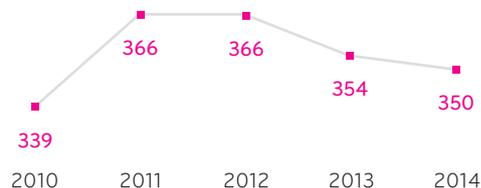
The product range of shaving care products, aftershaves and preshaves continued to be under strong pressure in 2014. The market volume dropped by 3.5 % to EUR 246 million.

### 11. OTHER BEAUTY CARE PRODUCTS\*

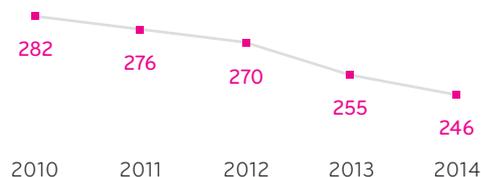
The sales value of other beauty care products recorded a decrease by 0.9 % to EUR 426 million in 2014. Foot care products should be stressed since they were able to increase their sales value through innovations by 2.1 % to EUR 148 million. The segment of baby care products remained flat with EUR 143 million. Depilatories recorded a minus of 4.9 %. The market volume fell to EUR 135 million.

\* Foot care products, depilatories and baby care products without shampoos, bath and shower preparations/soaps.

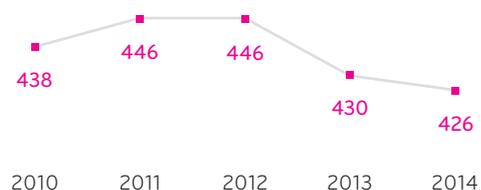
9 SOAPS AND SYNDETS in million €



10 SHAVING CARE PRODUCTS, AFTERSHAVES AND PRESHAVES in million €



11 OTHER BEAUTY CARE PRODUCTS in million €

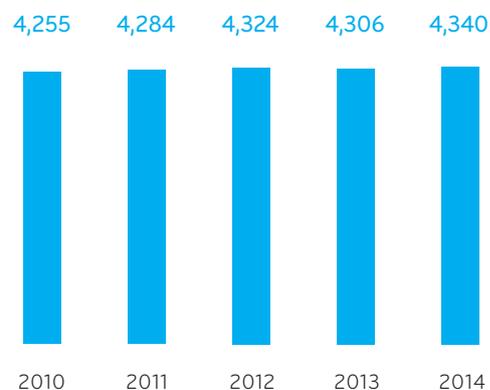


## Home Care Product Market Germany 2014

During the reporting year 2014 the total market of home care products grew by 0.8 % and EUR 34 million to EUR 4.3 billion. The trend towards practical small packages and attractive consumer offers has strengthened this development. Hypermarkets represent the largest, albeit stagnating distribution channel. Drug stores are the second largest channel with the highest growth rates<sup>1</sup>.

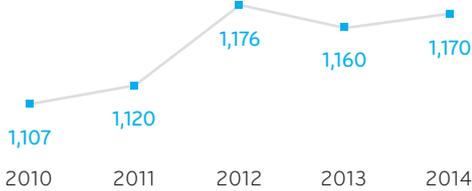
### OVERALL MARKET IS STABLE

in million € at retail sales prices

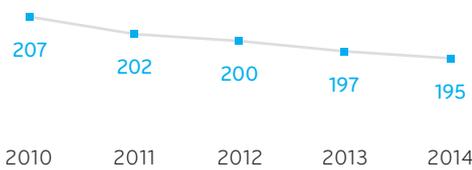


<sup>1</sup> Source: Information Resources GmbH

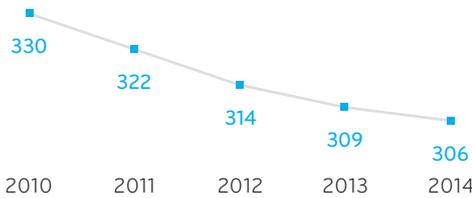
### 1 HEAVY-DUTY LAUNDRY DETERGENTS in million €



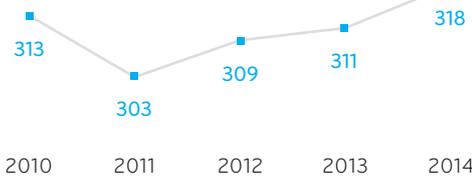
### 2 LIGHT-DUTY LAUNDRY DETERGENTS in million €



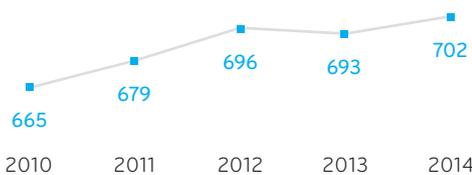
### 3 LAUNDRY ADDITIVES in million €



### 4 FABRIC CONDITIONERS in million €



### 5 DISHWASHING DETERGENTS in million €



## 1. HEAVY-DUTY LAUNDRY DETERGENTS

Heavy duty laundry detergents are the by far most important sub-market in this segment with a volume of EUR 1.2 billion and a market share of 27%. At the same time this category made a major, successful contribution towards the positive sales value development in home care with a plus of 0.9% and EUR 10 million.

## 2. LIGHT-DUTY LAUNDRY DETERGENTS

The sales value of light-duty laundry detergents dropped by 1% to EUR 195 million.

## 3. LAUNDRY ADDITIVES\*

The market for laundry additives was likewise not able to maintain its 2013 level and decreased by 1% to EUR 306 million. The declining trend of the previous years continued for this product category.

\* Stain removers, waterproofing products, pre-wash additives, soaking agents, bleaches, starches, ironing aids, textile dyes and dye removers.

## 4. FABRIC CONDITIONERS

Fabric conditioners recorded a 2.3% plus. This corresponds to a growth of EUR 7 million to EUR 318 million.

## 5. DISHWASHING DETERGENTS

The market for dishwashing detergents rose by 1.3%. This corresponds to a growth of EUR 9 million to a total of EUR 702 million.

## 6. HARD SURFACE CLEANERS\*

The sales value generated by hard surface cleaners amounted to around 20% within the home care product market. This means that this product category continues to be the second most important pillar for home care products. It recorded a slight plus of 0.9% to EUR 872 million. WC cleaning agents and – due to individual distribution channels – lime dissolvers and cleaning wipes are growing, whereas all-purpose, window and glass cleaning agents are declining.

\* Bath, sanitary, glass, window, home cleaning agents; pipe, drain cleaning agents; special cleaning agents (oven, lime, metal); WC cleaning agents and stones.

## 7. FURNITURE, FLOOR AND CARPET CLEANERS\*

The sales value of furniture, floor and carpet cleaners was declining in 2014. The market dropped to EUR 72 million. This corresponds to a minus of 2.7%.

\* Cleaning and care products for floors and stones, furniture and polishes

## 8. LEATHER CARE PRODUCTS

The market for leather care products remained unchanged on the same level as in 2013 with EUR 65 million.

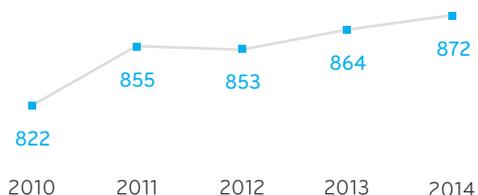
## 9. AIR FRESHENERS

The market for air fresheners rose by 1.8% to EUR 390 million in 2014.

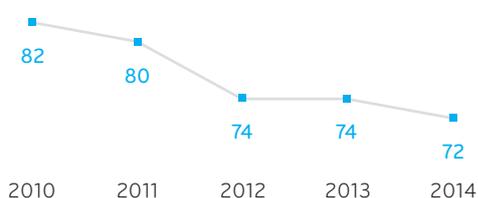
## 10. AUTOMOTIVE CARE

The market for automotive care maintained its sales value of EUR 250 million on the same level as last year.

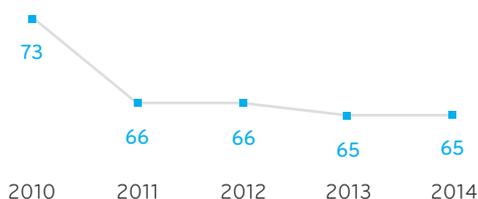
6 HARD SURFACE CLEANERS in million €



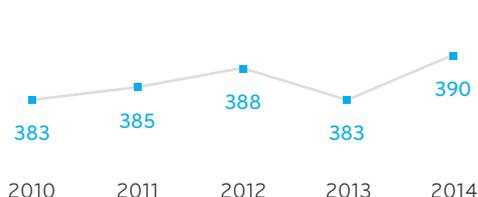
7 FURNITURE, FLOOR AND CARPET CLEANERS in million €



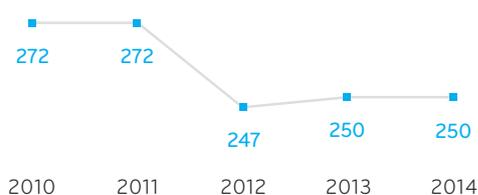
8 LEATHER CARE PRODUCTS in million €



9 AIR FRESHENERS in million €



10 AUTOMOTIVE CARE in million €



## Market Conditions

After mainly the impact of the insolvency of a major drug store chain resulted in large market transformations in Germany during the past years, 2014 was rather marked by competition activities. This development was flanked by a high innovation activity of IKW members, a further growing competition as well as the expansion of large drug store companies and the modernisation of existing selling spaces.

On the market for beauty care products, drug stores remained the by far most important sales channel with a market share of more than 43% and more than 5% growth. Discounters, too, are growing significantly, albeit only through the "soft" discounters" (Netto, Penny). The traditional food retail trade and hypermarkets have partly lost considerably.<sup>1</sup>

As far as home care products are concerned, every household – with an increasing number of households – spent on average 1 euro less in 2014 versus prior year. Consumers were shopping again more in drug stores and less in hard discounter stores.<sup>1</sup>

## Outlook 2015

In 2014 the market for beauty and home care products rose despite international crises and conflicts by 1.4%. The innovative products of the industry represented by IKW as well as the positive development of the general consumption climate in Germany were the underlying drivers.

In 2015 the business community and political circles are facing increasingly tough challenges. Foreign trade must make its way in an increasingly turbulent environment. The Ukraine crisis, changes in Greece, terror risks and a reform deadlock in Italy and France bring about a lot of

"The markets for beauty care and home care products fulfil dreams, bolster people up and ensure self-confidence."

Rainer Ansknewitsch, Information Resources GmbH



uncertainty. On the other hand, the weak Euro and low raw material prices provide for an uptrend.

Domestic demand continues to generate a lot of hope. A foreseeable long-term historically low interest rate and a high consumption tendency of consumers imply a positive development. The different indexes such as the ifo business climate of the GfK consumption climate were again increasing at the beginning of the year. According to GfK, the consumption climate is as good as it hadn't been for a long time.

However, any further satisfying development will be decisively dependent on the economic and structural policy environment as well.

For Germany as a business location political circles are facing major tasks: far-sightedness and a sense of proportion for energy and tax policies as well as self-assertion on the European level will be pivotal for a continuation of the so far good economic development in Germany.

IKW anticipates a further intensified competition in 2015 which will result in innovations with relevant added value for consumers. Against this backdrop IKW forecasts a moderate growth of the market for beauty and home care products. This is likely to be supported, as during the past years, both on the level of consumers and industry by a significant stepping up of the role played by the orientation towards health and sustainability.

<sup>1</sup> Source: Information Resources GmbH

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INTERDISCIPLINARY  
ACTIVITIES



## Medium-sized Businesses

Medium-sized businesses have a special standing at IKW. Two conferences happen annually for medium-sized businesses exclusively, during which relevant economic topics are intensively assessed.

One important part of the March 2014 Spring Conference were reports of IKW members on their experiences in emerging markets such as China, Turkey, Russia, Poland and Brazil. GfK presented hard facts on the differences between trade at the classic point of sale and E-commerce. Furthermore Prof. Schroiff explained how innovation mistakes can be avoided by defining successful concepts based on analysis in the digital world. In the Autumn Conference various member companies shared their experiences in markets such as Asia, USA and Mexico. Furthermore one of the key speakers, Dr. Robert Kecskes from GfK, spoke about the new middle class on the European stage. He defined the generation Y and the digital generation Z as target consumer groups of 2025. The conference ended with a presentation on "Story telling and brand management in digital times" by Hubertus von Lobenstein, Berlin.

## Trade Fairs Abroad

IKW has been promoting its members to interact cross-nationally on an international level since the mid-90s. Part of this is the coordination of private contributions of IKW member companies at foreign fairs, as well as the application and implementation of the IKW foreign fairs (these have been accepted by the foreign fair program of the German Federal Ministry of Economics). The foreign fair program is useful for the small firm sector in terms of realizing growth outside German borders.

IKW applies for subsidies, through the exhibition committee and fair committee of the German Economy (IKW is a member of the latter), at the

"Small and medium-sized enterprises are excellently supported by IKW. This is reflected by the growing number of new members."



Heinrich Beckmann, Chairman of the IKW Committee for Small and Medium-sized Enterprises, delta pronatura Dr. Krauss & Dr. Beckmann KG

Federal Ministry of Economics, for the fair participation of medium-sized businesses (members of IKW) at fairs outside of the EU. The so-called German Pavilions enable firms to present themselves and their products at individual company stands. They are hereby integrated into the infrastructure of a German community stand and can advertise with the well appreciated quality promise "Made in Germany". Furthermore, they profit from extensive assistance and guidance, as well as a mutual information and service point on-site.

The firm presentation is flanked by a broad portfolio of accompanying supportive measures: press conferences, incentive events for fair goers, audio visual advertising material, customer attraction, and visits of German representatives to the fair booths. Additionally, an online platform serves to connect exhibitors and the press at [www.german-pavilion.de](http://www.german-pavilion.de).

IKW is currently active at the trade fairs in Dubai, Istanbul, Hong Kong, Shanghai and Moscow. Please find more information here: <http://www.ikw.org/ikw/auslandsmessen>.



## Beauty Care

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.

Safety assessment of cosmetic products is an important topic of the regulation as it is described in more detail than before in Annex I of the regulation. The EU Commission has published a guideline for the annotation of Annex I. The qualifications of the persons who are entitled to conduct the safety assessment are specified in the regulation. Interdisciplinary knowledge is necessary for competent assessment of safety of cosmetic products. The DGK, German Association for Scientific and Applied Cosmetics, together with IKW, offers advanced training courses for safety assessors in German and English (see [www.safetyassessor.info](http://www.safetyassessor.info)). In the last year two seminars were held in addition in English in combination with the HPCI-Conference in Warsaw and Istanbul. More than 130 safety assessors registered for these events.

Claim substantiation of cosmetic products is also in the focus of the legislation. Claims always need to be justified and in no way mislead the consumer. The EC Cosmetic Regulation was complemented by another regulation with common criteria. These concern truthfulness, evidential support, proof, honesty, fairness and the necessity to enable the consumer to make a well-founded decision based on the information about the products.

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. The very rare case of a serious undesirable effect, e.g. such a one which needs to be treated in a hospital, should be reported, according to the new EC Cosmetic Regulation – this process was named Cosmetovigilance.

The European Commission published guidelines and standardized report forms regarding this topic on the internet.

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**"When we started with the education courses for safety assessors, we would never have dreamt that our approach would one day be recognised throughout the world. An unbelievable success story!"**



*Birgit Huber, Head of the Department Beauty Care within IKW*

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Furthermore, all products need to have been registered at the Cosmetic Products Notification Portal (CPNP).

The EC Cosmetic Regulation contains numerous additional regulations, such as for nanomaterials, CMR substances, positive lists and banned substances and many more. Furthermore, labeling requirements in the German language, are established.

Further emphasis in this sector lies on the dialogue with other institutions. Further information for producers and distributors of cosmetic products in Germany can be found on the homepage: [www.ikw.org/ikw-english](http://www.ikw.org/ikw-english).



## LEGAL REGULATIONS

For detergents and maintenance products, the following legal regulations are especially important:

- Detergents Regulation (EC) No. 648/2004
- Chemicals Regulation (EC) No. 1907/2006 ("REACH")
- Regulation on Classification, Labelling and Packaging (EC) No. 1272/2008
- Biocidal Products Regulation (EU) No. 528/2012
- German Food, Commodities and Feed Act

The Home Care division of IKW provides information for members and guidelines and organises information events on a regular basis on current legal developments concerning detergents, care and cleaning products. It is the contact partner for ministries and public authorities on a federal and regional level as well as for the members of the German Parliament and the European Parliament. The goal is to obtain regulations which are helpful for consumer and environmental protection and feasible for the member companies.

## FORUM WASCHEN

The dialogue platform FORUM WASCHEN (Forum Washing) has originated from a sustainability initiative of IKW, taken in 2001. FORUM WASCHEN has a total of 37 stakeholders including public authorities and ministries, professional organisations, industry, environmental and consumer associations, universities, institutes and schools from Germany, see: [www.forum-waschen.de](http://www.forum-waschen.de). The IKW Home Care division 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) and cleaning.

The patroness of the Action Day 2015 is Maria Krautzberger, the President of the German Environment Agency. She placed her welcome address for the 2015 Action Day under the motto: "Small changes can have a big impact" and referred, amongst other things, to the following: "The energy

"As a result of the Globally Harmonised System, the hazard statements are in most cases more rigorous, even if nothing changes in respect of the formula and the products were used without any problems in the past."

Dr. Bernd Glassl, Head of the Department Home Care within IKW



consumption per wash cycle for coloureds can, for instance, be reduced by more than 30% if the 30 degree programme is used instead of the 40 degree programme."

The FORUM WASCHEN has been distinguished in 2015 for the third time by the Sustainable Development Council of the German Government as a project with the "Werkstatt N" quality hallmark. 100 projects and impulses recognised by the jury of the Sustainable Development Council are awarded this title, which applies during the year of the distinction.

## PRODUCT SAFETY

The Home Care division 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. In the period between 2006 and 2013 13.1 billion packages were sold and the following case data was registered:

| Allergies                           | Total number of cases from 2006 to 2013 | Number of cases per 1 billion of sold packages |
|-------------------------------------|-----------------------------------------|------------------------------------------------|
| Inquiries by Doctors                | 43                                      | 3                                              |
| Medically confirmed                 | 23                                      | 2                                              |
| Skin Irritations                    | Total number of cases from 2006 to 2013 | Number of cases per 1 billion of sold packages |
| Described plausibly by the consumer | 3,374                                   | 258                                            |
| Medically confirmed                 | 106                                     | 8                                              |

These numbers reflect the high safety status of detergents and maintenance products for private consumers.

EUROPE



## Future prospects

Apart from the national market environment in Germany, characterised by intense competition, the IKW member companies are confronted in an increasingly globalised world with growing international turbulences, also and above all in Europe. When was "the old world" last faced with such a political, intellectual, moral and economic challenge with an open future? Experts are split over the assessment of the future. SÜDDEUTSCHE ZEITUNG<sup>1</sup>, for instance, wrote in an insert in February of this year: "The end of serenity. The times during which members were able to devote themselves to their business safely and freely is over. The EU struggles with its response to the threats." At the same time, DIE ZEIT<sup>2</sup> headlined: "Soft and strong! The EU gradually understands that it is a world power" and paints a positive outlook "... the EU finds its way to integration and solidarity. Germany learns to be a better leader."

As a matter of fact, the future prospects of Europe are open. In addition to the solution of the big crises, a positive development will decisively depend on the creation of reasonable economic framework conditions and the avoidance of excessively obstructive regulations.

At present the latter is not yet in sight. Since 2007 the number of EU rules and regulations in the fields of health, safety and the environment has, for instance, almost doubled. This leads to high admini-

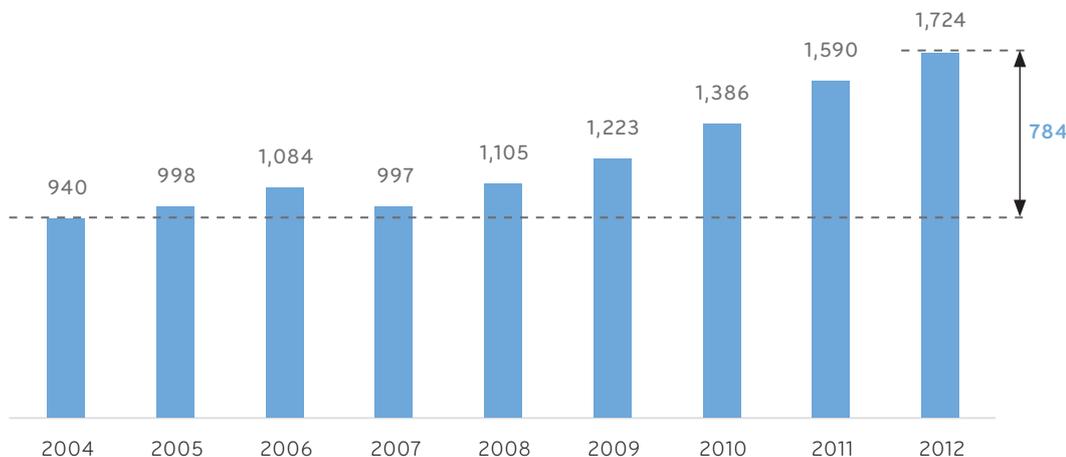
"Since 70 years Europe has never been in such a dramatic situation. Mastering of the big crises, building of a reasonable general economical set-up with the avoidance of a regulatory huddle will be decisive for Europe's future".



Thomas Keiser, Director General, IKW

strative costs and hence to high market barriers – in particular for small and medium-sized enterprises – and also to uncertainties amongst consumers, as has been documented in my numerous recent studies. At the same time the readiness of companies to invest is significantly declining. The investments of the chemical industry in Europe are, for instance, dropping considerably whereas they are rising very strongly in Russia, China, the USA, India and Brazil.

### CUMULATIVE NUMBER OF EU REGULATIONS ON HEALTH, SAFETY & ENVIRONMENT



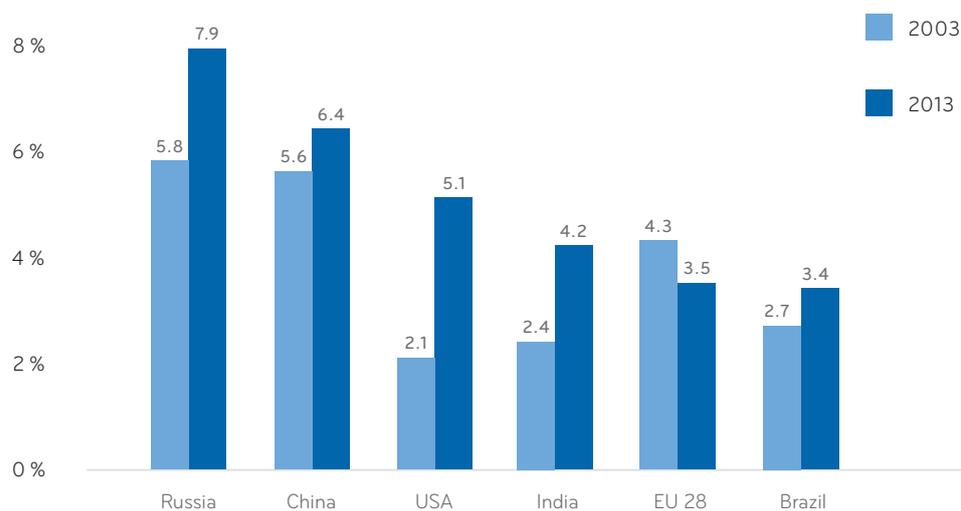
Source: Competitiveness of the European Chemical Industry, January 2015

1 Sylvie Kauffmann and Stefan Kornelius: Das Ende der Ruhe. Süddeutsche Zeitung, Nr. 29, 5 February 2015, page 11.

2 Bernd Ulrich: Sanft & Stark. DIE ZEIT, Nr. 6, 5 February 2015, page 3.

## FALLING BEHIND IN THE INVESTMENT RACE:

Capital spending intensity by region (% sales)



Source: Competitiveness of the European Chemical Industry, January 2015

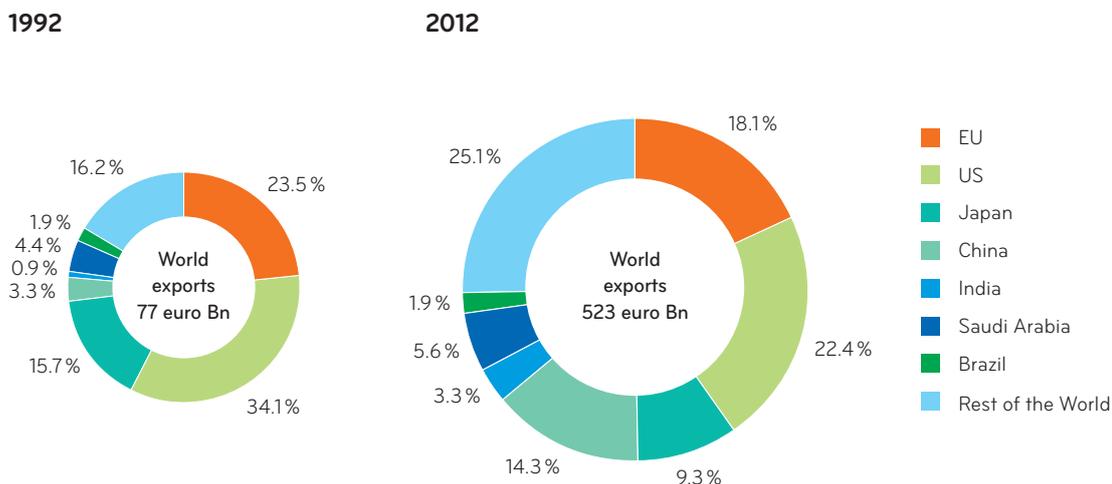
## Our activities

IKW, therefore, cooperates intensely with its European sister associations A.I.S.E and Cosmetics Europe, amongst others, in order to channel of regulations reasonably and in a way which can be understood by the consumer. Corresponding examples include in the field of Beauty Care the implementation of the regulation on nanomaterials: Together with various other organisations and public authorities, general information on the labelling of nanomaterials as well as profiles for the special nanoparticles used in cosmetic products has been compiled.

Another example concerns the education courses for safety assessors, which IKW initiated together with Deutsche Gesellschaft für Wissenschaftliche und Angewandte Kosmetik e.V. (German Society for Scientific and Applied Cosmetics - DGK) in Germany. Safety assessments are imposed by the cosmetics legislation and persons who make the assessment must produce evidence of a certain education. Frequently, this training is, however, not yet sufficient. For that reason prospective safety assessors must acquire additional knowledge. The Competence Partner Beauty Care within IKW and DGK support them with their safety assessor education course.

## GROWING EXPORT MARKET, DECREASING SHARE OF EXPORTS FOR INDUSTRIAL REGIONS

Chemical exports by country of origin (% of total)



Source: Competitiveness of the European Chemical Industry, January 2015

In the field of Home Care the central topic in 2014/15 was the changeover of labelling to the Globally Harmonised System for the classification and labelling of substances and mixtures (GHS). In order to ensure that the labelling concerning possible irritant effects on the skin and eyes will continue to be as appropriate as possible, A.I.S.E. has set up, together with IKW, amongst others, the classification network "DetNet" ([www.det-net.eu](http://www.det-net.eu)). For DetNet users IKW offers seminars in German.

In connection with the labelling under GHS, studies were carried out on eye exposure to detergents, care and cleaning products ("MAGAM") – in co-operation with poison control centres in Germany, Austria, Denmark, Italy, Slovakia and the Czech Republic as well as A.I.S.E.. The coordination for industry is carried out by the Competence Partner Home Care within IKW.

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