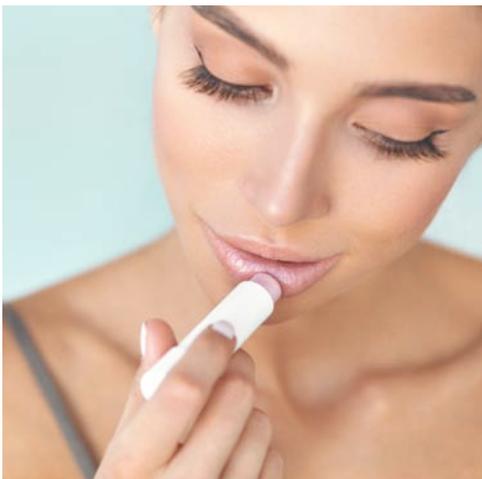


# Annual Report 2016.2017





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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 420 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 more than EUR 18 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,



The overwhelming majority of our companies operate in many countries of the EU, but also on extra-European markets with production and distribution companies. Achievements which have been made over decades such as the free movement of goods and the free choice of the place of work and residence are important. This is why the companies of our industry are following the international political events with corresponding attention.

Even if international politics are now and then marked by stormy developments, the current business situation is consistently stable. The markets in Germany and Europe prove to be robust.

Findings of the Society for Consumer Research (GfK) show that a markedly optimistic sentiment prevails amongst German consumers. They anticipate that the economic driving force will continue to thrive and their income will rise. They like to invest their money into beautiful things or experiences instead of parking it on their account for mini interest rates.

For many people products which increase their wellbeing, ensure a beautiful and well groomed appearance or create a pleasant, cosy home are at the top of their shopping list. According to analyses of the market researchers of IRI Information Resources, consumers in Germany spend every eighth euro on products for beauty and homecare. The total sales revenues of our industry rose on average by 1.6 % during the past five years

It is particularly noticeable that the desire to show one's own style and the pleasure in trendy colours and textures have resulted in a particularly strong surge in demand of an average 5.7% for decorative cosmetics.

However, not only one's own personal appearance, but also the effect of the home environment on the attitude towards life is experiencing a high appreciation. This is reflected by the growth trend for homecare products which have been significantly increasing with an average plus of 1.7% during the past five years. The numbers are confirmed by the attitudes and motives of consumers as far as cleaning, care, cleanliness are concerned. We know from the IKW study "The new power of cleaning", which was published in Spring 2017, that people attach an increasing value to the care of their own home – the flat or the house as a reliable and pleasant refuge in an increasingly confusing world.

The results of our study entitled "Youth undisguised" published in 2016 met with large interest – also on the international level. This research work had been initiated by the desire to learn more about the preferences of young people concerning cosmetic products, youth routines and the related psychological needs and behaviour patterns. In the biographical phase, when the self-perception is not yet consolidated and the physical changes lead to some irritation, cosmetic products provide some personal safety. They contribute towards acting more confidently in the communication with friends and adults.

1 Source: <https://www.destatis.de/DE/ZahlenFakten/GesamtwirtschaftUmwelt/VGR/Inlandsprodukt/Tabellen/Gesamtwirtschaft.html;jsessionid=0CE53DB76DD8CDD47788515BB8AC559F.cae4>

2 Source: <http://www.gfk.com/de/insights/press-release/verbraucherstimmung-weiterhin-gut-gfk-konsumprognose-fuer-2016-traf-genau/>

The two studies are only part – albeit a particularly outstanding one – of our comprehensive public relations activities. The dialogue with advocacy groups and stakeholders from politics, ecology and consumer protection is a special priority for us. We engage in a lively exchange with the corresponding organisations: within the framework of the dialogue forum "Dialogue on Cosmetics" established for many years or the sustainability initiative "Forum Washing" completed by trade fairs, congresses and the participation in political events.

The demands on IKW as a reliable partner in dialogue with the media have permanently grown during the past years. We are dealing particularly frequently with issues concerning the health safety and environmental compatibility of our products. We are pleased to deal with these topics.

As an industry we finally assume responsibility on a daily basis for consumers having confidence in us and being able to use, for instance, shampoos, creams and dishwashing detergents without any concerns with a good ecological conscience. Our ambition is always the factual provability of our statements and assessments.

The bottom line of IKW on the current situation is that the positive economic trend of the previous years has continued and everything suggests that we will succeed once more in supporting the robust business situation with our products. Our companies fulfil consumer desires. The innovative strengths, the scientific expertise and economic knowhow of the around 50,000 employees of our industry guarantee that consumers will constantly find new, more effective and at the same time also more sustainable products on the shelves of the retail trade. In other words: our industry creates long term and reliable values. During the past 10 years alone the IKW members generated 18% growth and the current IKW industry barometer shows that they will continue to make major investments.

Against this backdrop we will continue our work during the coming years, too.

Yours sincerely



**Dr. Rüdiger Mittendorff**

Chairman of the Executive Board

The German Cosmetic, Toiletry, Perfumery and  
Detergent Association





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"Quo vadis, Europe?"  
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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 eg 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

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“Consumption year 2016:  
Retail trade with a significant  
growth in sales revenues”



Handelsblatt, 6 January 2017

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of private consumption in Germany. During the past years sales revenues were significantly rising to more than EUR 18 billion.

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.

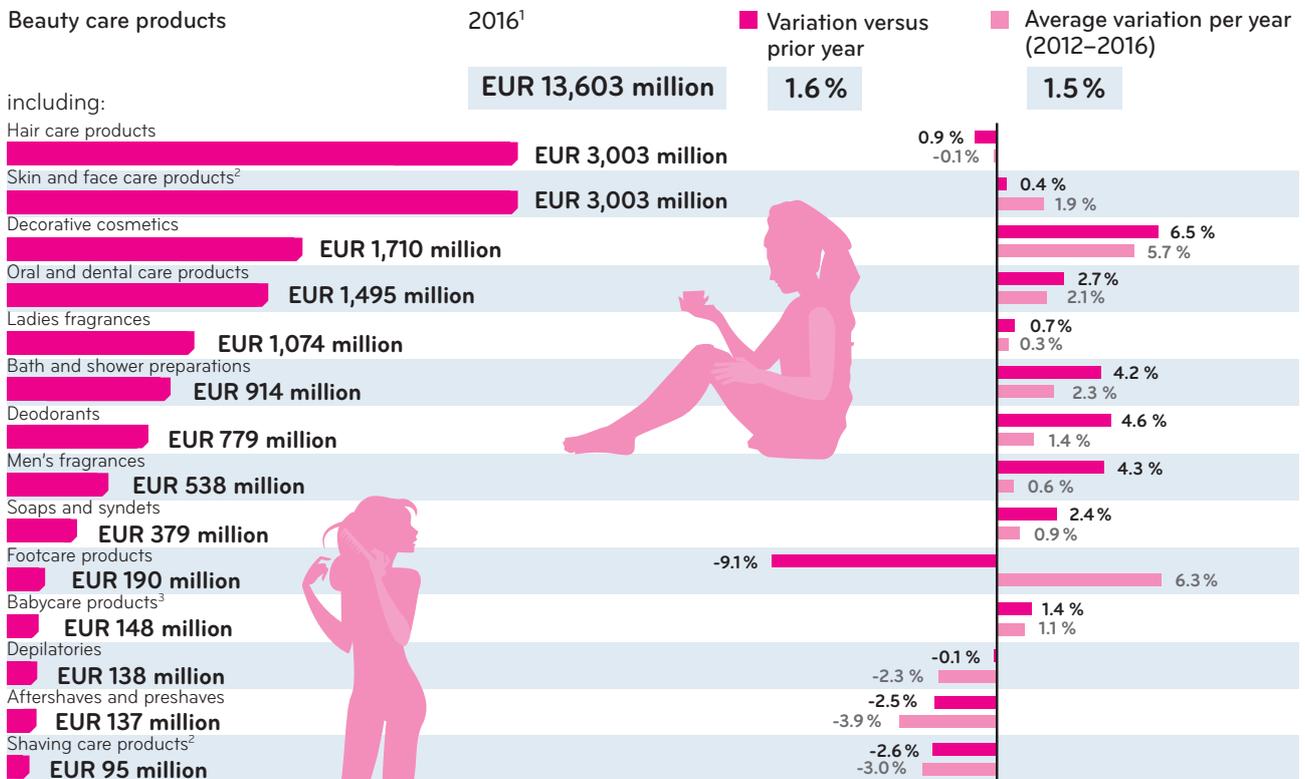


## Beauty care product market Germany

The sales value of beauty care products rose in 2016 again, this time by EUR 216 million to a total of EUR 13.6 billion or by 1.6%. The development is based on an ongoing high per capita spending of currently EUR 153 per year and, more particularly, high-quality market launches. Growth was generated above all in the trade channels drugstores, malls and department stores as well as brand discounters.

The leading growth segments were decorative cosmetics, deodorants, men's fragrances as well as bath and shower preparations.

### BEAUTY CARE PRODUCT MARKET GROWS CONTINUOUSLY



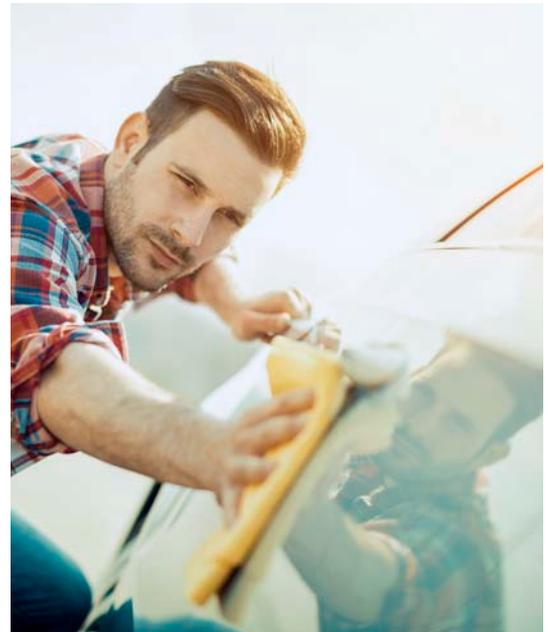
Market figures beauty care: status 1 December 2016

<sup>1</sup> Projection of IKW based on IRI data Jan – Sept 2016 and member information; <sup>2</sup> Ladies and Gents <sup>3</sup> Without shampoos, bath- or shower preparations, soaps; ©IKW

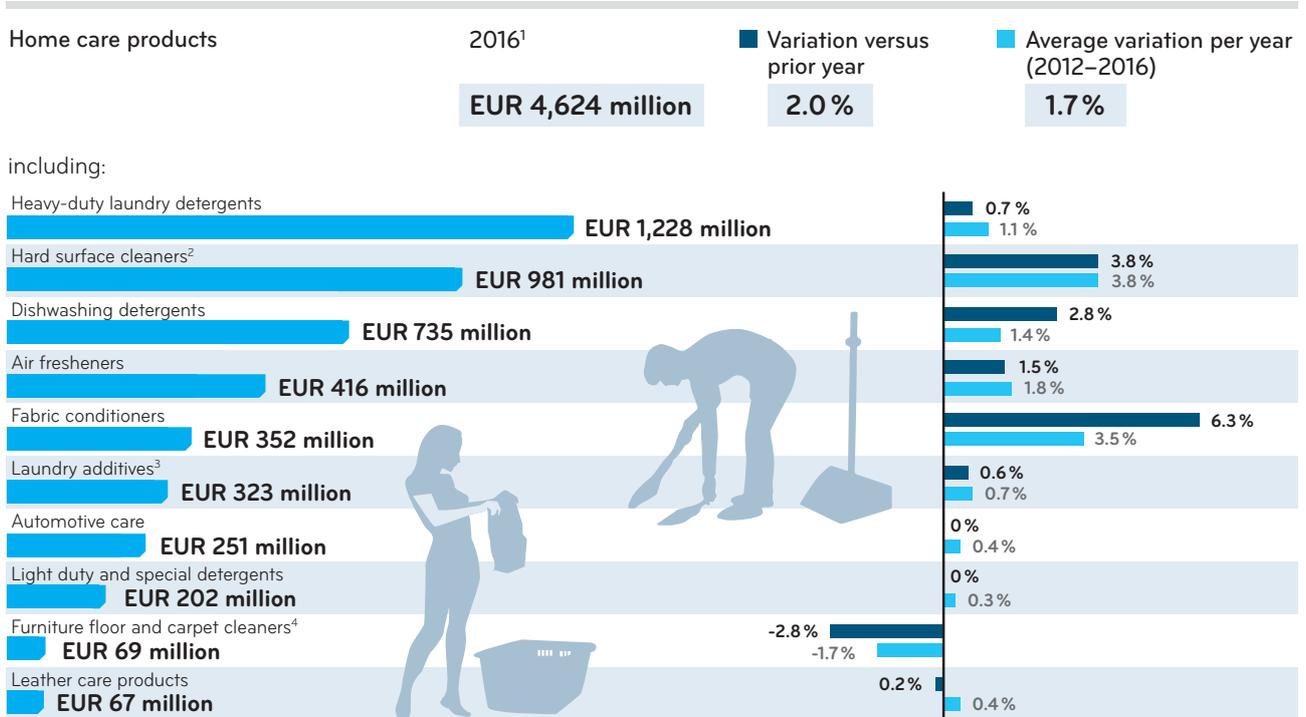
## Home care product market Germany

The total sales revenues of the detergents, cleaning and care products for private households rose in Germany versus 2015 by 2 % or EUR 91 million and now reach EUR 4.6 billion. The main drivers underlying the increase in sales revenues were fabric conditioners, hard surface cleaners and dishwashing detergents.

The increases were generated, more particularly, in the trade channels drugstores and brand discounters.



### HOME CARE PRODUCT MARKET WITH SIGNIFICANT GROWTH



Market figures home care: Status 1 December 2016

1 Projection of IKW based on IRI data Jan – Sept 2016 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. Private consumption made an essential contribution towards the good economic development.



"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

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.

Consumers have a rising per capita consumption of EUR 215.



## 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.

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“2017 will be the year of  
maximum uncertainty.”

Wolfgang Ischinger,  
Chairman of the Munich Security Conference,  
Bild Zeitung, 14 February 2017

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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 70% of the polled member companies anticipate higher investments and 65% expect a good to very good market development. IKW, therefore, anticipates a market growth of approximately 2%.

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) Petra Schäfer (Globus) or representatives from Nielsen, IRI or GfK. Beyond the meetings, IKW offers workshops such as on Category Management and supports members in their foreign business.

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



Christian Lindner, Member of the Provincial Government, National Chairman of the Free Democrats and Chairman of the FDP Parliamentary Group North Rhine Westphalia (NRW)

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“The many new national and EU laws and regulations with which our companies are faced at increasingly shorter intervals, are difficult to catch up with for many medium-sized businesses. If there are any issues, IKW provides a very sound support. This is not at all self-evident.”



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

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German Pavilion, Beautyworld Middle East, Dubai, May 2016

## International Business

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](http://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 as well as BeautyEurasia in Istanbul. For Cosmoprof North America in Las Vegas IKW offers for the first time a German Village for its members in July 2017.

In addition to the trade fair activities, IKW initiates market development measures for prioritised export regions such as Brazil and Japan 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 care such as round table discussions and workshops on future trends.

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.

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“Home care and beauty care products are self-confidence and quality of life directly from the pack.”

Christoph Knoke, Managing Director, IRI Information Resources GmbH



## INTERDISCIPLINARY ACTIVITIES



**1. and 2. Multipliers meeting**, 11 March 2016, Fulda, Klaus Müller, Confederation of Consumer Advice Centres (Picture 1); Dr. Bernd Glassl, IKW (Picture 2) **3. Forum Washing, D.A.CH meeting on Household Arts**, 21– 22 April 2016, Bonn, Elke Wieczorek, DHB – Household Network; Prof. Dr. Rainer Stamminger, Institute for Agricultural Engineering –University of Bonn; Dr. Katharina Ellmer, Freudenberg Technology Innovation SE & Co. KG **4. IKW Board of Elders Meeting**, 9 May 2016, Hamburg, Heinrich Beckmann, delta pronatura Dr. Krauss & Dr. Beckmann KG; Jörg A. Breckwoldt; Dr. Rüdiger Mittendorf, Sebapharma GmbH & Co. KG; Herbert Sendlinger; Vincent Wupperman; Klaus Lange **5. Cosmetics Europe Week - panel discussion**, 13–17 June 2016, Brussels, Roman Mokry, DG Grow, European Commission; Birgit Huber, IKW; Bettina Ørsnes Larsen, The Danish Environmental Protection Agency; Gerald Renner, Cosmetics Europe **6. Dialogue Cosmetics**, 5–6 September 2016, Frankfurt a. M., Marcus Bloser, iku GmbH; Prof. Jürgen Lademann, Charité; Birgit Huber, IKW; Klaus Afflerbach, health & media GmbH **7. and 8. Home Care Info Meeting**, 7 September 2016, Frankfurt a. M., Dr.-Ing. Annekatriin Lehmann, TU Berlin (Picture 1); Dr. Bernd Glassl, IKW; Dr. Philipp Schäfer, Reckitt Benckiser Deutschland GmbH (Picture 2) **9. Cosmetics GMP**, 12 September 2016, Frankfurt a. M., Joanne Nikitakis, The Personal Care Products Council (PCPC)

## 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.



10. IKW Medium-Sized Business Meeting, 28 September 2016, Bad Homburg, Christian Lindner, FDP. 11. European Federation for Cosmetic Ingredients (EFFCI) Meeting, 20 October 2016, Potsdam, John Hibbs, British Association for Chemical Specialities (BACS); Birgit Huber, IKW; Lin Qingbin, China Food and Drug Administration (CFDA) 12. InterCHARM trade fair, 26–29 October 2016, Moscow, Baran Ercan, expotec; Navina Kautz, German Embassy Moscow; Thomas Keiser, IKW 13. Founding Meeting of the Science Media Centre, 22 November 2016, Heidelberg, Birgit Huber, IKW; Dr. Robin Wegener, Bayer Science & Education Foundation; Johannes Seiler, Rheinische Friedrich-Wilhelms University Bonn 14. IKW Business Press Conference, 1 December 2016, Frankfurt a. M. 15. IKW/ALB-Workshop, 11 January 2017, Frankfurt a. M., Dr. Gerd Mildau, Chemical and Veterinary Inspection Office Karlsruhe 16. Meeting of the International Association Collaboration with 17 associations, 1 March 2017, Palm Beach, Linda R. Marshall, Elysee Scientific Cosmetics, USA; Pedro Amores da Silva, ABIHPEC, Brazil; Birgit Huber, IKW 17. IKW Medium-Sized Business Meeting, 22 March 2017, Frankfurt a. M., Petra Schäfer, Globus SB-Warenhaus Holding GmbH & Co. KG 18. VCI Parliamentarian Evening, 29 March 2017, Berlin, Hubertus Heil, SPD; Kerstin Andreae, The Greens; Thomas Keiser, IKW

“We are pleased that our work meets with increasing recognition and has recently been presented with several awards.”



Thomas Keiser, IKW Managing Director



FINALIST  
Best Campaign





## 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.

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“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

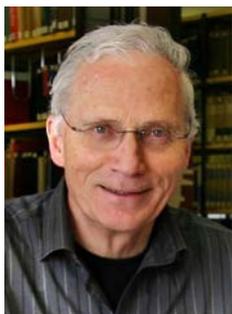
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In the event of contract manufacturing or imports from countries outside the EU the responsible person indicated on the packaging is responsible for the product vis a vis the legislator and more particularly for the presentation and composition as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

### COSMETICS-GMP AND SAFETY ASSESSMENT

Furthermore cosmetics-GMP is requested for manufacturing cosmetic products and also a safety assessment by a designated safety assessor.



**"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 has established training courses for safety assessors in German and English together with DGK, the German Association for Scientific and Applied Cosmetics (see [www.safetyassessor.info](http://www.safetyassessor.info)). Meanwhile more than 100 participants have successfully completed all of the 7 courses and received their certificate.

### LABELLING IN GERMAN LANGUAGE

Besides these requirements the EC Cosmetics Regulation contains a lot of other regulations such as for nanomaterials, 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 the German language. IKW has published an information for producers and distributors of cosmetic products on its website under the following link: <http://www.ikw.org/ikw-english/beauty-care-topics/all/general-information-for-manufacturers-and-distributors-of-cosmetic-products-in-germany-overview-of-the-requirements-of-european-cosmetics-legislation-with-links-to-more-detailed-information/>

### 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



IKW continuing education on cosmetics GMP, 12 September 2016, Frankfurt am Main

From left: Joanne Nikitakis (Director Cosmetic Chemistry, The Personal Care Products Council), Dr. Klaus Rettinger, Birgit Huber, Dr. Marita Grothus (all IKW)

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, childrens' doctors, consumer associations, hair dressers, beauticians and many more. In regular meetings we try to identify common interests and publish a common position. We have commonly published a leaflet on internet sales of cosmetic products.

### THE SELF-PERCEPTION AND SELF-ESTEEM OF ADOLESCENTS AND YOUNG ADULTS

An in-depth psychological-representative study from rheingold salon compiled for IKW has examined 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 the self-esteem of young people? 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



Seminar for safety assessors, 27 September 2016, Warschau, Dr. Jens Burfeindt, IKW

people in their self-discovery? The first in-depth psychological representative study on the transition to adulthood provides answers to these exciting questions. Within the framework of the qualitative polling, 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 surveyed. An overview of the study results can be found under [www.ikw-youthstudy.org](http://www.ikw-youthstudy.org).





## 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 from 2006 to 2015 16.4 billion packages were sold and the case data was registered as shown in the chart on the right. The numbers reflect the high safety level of detergents, care and cleaning agents for private consumers.

Allergies	Total number of cases from 2006 to 2015	Number of cases per 1 billion sold packages
Inquiries by Doctors	47	3
Medically confirmed	28	2
Skin Irritations	Total number of cases from 2006 to 2015	Number of cases per 1 billion sold packages
Described plausibly by the consumer	4,331	264
Medically confirmed	121	7

## 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.

Dr. Heinrich Bottermann, Secretary General of the Federal German Environmental Foundation (DBU). In his welcome address he writes, amongst other things: "Human behaviour has always an impact on the business community, the environment and the society. The behaviour of each single person is of decisive importance. ... Consumers can, for instance, save water and energy during dishwashing, without any compromise on the cleaning performance or hygiene having to be made. It is important that disseminators of Forum Waschen carry out an action day with the population and in particular the young generation every year, in order to motivate a more sustainable behaviour in dishwashing, washing and cleaning. This constitutes a major contribution towards the strengthening of the action competence on a day to day basis. ..."



Dr. Heinrich Bottermann,  
Secretary General of the  
Federal German Environmental  
Foundation (DBU)

## Sustainability

### 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 patron of the Action Day 2017 is

"The co-operation with the Forum Waschen is for me a multiple enrichment. As a result of the regular expert exchange with the other players, I am always on the respectively up-to-date level which I can also pass on directly in my lectures to my students. Furthermore, my students can already gather valuable practical experience in joint projects with Forum Waschen at a very early stage."



Prof. Dr. Sascha Skorupka, Fulda University of Applied Science

In August 2016 the new internet platform "waschtipps.de" (washing tips) was released. The logo of the new website shows the web address:

**waschtipps.de**

Persons to be addressed with the new internet presence are, for instance, still in an apprenticeship, at school, at the university or are already having a job and live in a flat sharing community, their first own flat or a student dormitory.

### REPORT "SUSTAINABILITY IN THE DETERGENTS AND MAINTENANCE PRODUCTS INDUSTRY IN GERMANY 2015 – 2016"

The current IKW report "Sustainability in the Detergents and Maintenance Products Industry in Germany 2015–2016" is published in German in parallel to the IKW Annual Report 2016/17 and includes information on environmental, social and economic sustainability indicators of the industry see: <http://www.ikw.org/haushaltspflege/themen/ikw-nachhaltigkeitsbericht-aktuell/>).

### "SUSTAINABLE WASHING AND CLEANING" INITIATIVE

The "Sustainable Washing and Cleaning" initiative ("A.I.S.E. Charter") of the International Association for Soaps, Detergents and Maintenance Products

launched in 2005 was revised and extended in 2010. In addition to the company-related seal, a product-related seal was introduced. For the awarding of the product seal so-called advanced sustainability profiles (ASP) are compiled for the different product categories.

For the following product categories (sorted chronologically according to the respective launch) for application in private areas ASP criteria have already been published:

1. Solid laundry detergent products
2. Liquid laundry detergent products
3. Fabric conditioners
4. Automatic dishwashing detergents
5. All-purpose cleaners (liquid application)
6. Glass, pane, bath, kitchen and all-purpose cleaners for hard surfaces (spray application)
7. Manual dishwashing detergents
8. Toilet cleaners

In December 2016 the industry initiative Sustainable Washing and Cleaning was included into the project "Siegelklarheit" (seal clarity) of the German Government in Germany ([www.siegelklarheit.de](http://www.siegelklarheit.de)). The product seal is assessed as a "good choice" just as the European eco-label.

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## Technical Topics

### IKW RECOMMENDATIONS FOR THE QUALITY ASSESSMENT OF DETERGENTS AND MAINTENANCE PRODUCTS

In June 2016 the updated IKW Recommendations for the Quality Assessment of the Cleaning Performance of Dishwasher Detergents, Part B, Update 2015 were published in German and English in the SOFW Journal, representing an update of the "Methods for Ascertaining the Cleaning Performance of Dishwasher Detergents (Part B)" from 2006. The updated IKW recommendations were elaborated jointly by test institutes from Germany, France, the Netherlands and Spain as well as manufacturers of automatic dishwashing detergents and dishwashers.



"The industry of household appliances and detergents and test institutes had worked hands to hands those last couple of years to develop the latest recommendations for quality assessment of automatic dishwashing detergents. This co-working was successful and fruitful through the strong commitment of the overall members to build up the state of the art testing in terms of reliability, reproducibility, and consumer's relevancy."

Anthony Million, Eurofins ATS

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## PHOSPHOROUS CONTENT IN AUTOMATIC DISHWASHING DETERGENTS

For dishwashing detergents intended for consumers and which will be first marketed from 1 January 2017, the Detergent Regulation (EC) No 648/2004 prescribes in respect of the phosphorus content that the value of 0.3 gramme phosphorus per standard wash cycle must not be exceeded.

The manufacturer is responsible for applying appropriate measures in order to comply with this limit value. The Working Group "Phosphorus Determination in Mixtures" within IKW has described appropriate measures to comply with the phosphorus restriction for manufacturers of automatic dishwashing detergents and published them in German and English in the SOFW Journal in November 2016.

## Legal Regulations

### NOTIFICATION OF FORMULATIONS OF MIXTURES CLASSIFIED AS DANGEROUS

The Regulation (EC) No. 1272/2008 on Classification, Labelling and Packaging also includes a mandate for the European Commission to review whether the provisions on the notification of formulations should be harmonised within the European Union. In 2012 the Commission reached the conclusion that there should be a harmonisation. Since then detailed provisions have been elaborated, discussed and amended. Based on a draft of 2015, a cost/benefit assessment was carried out. The result shows that even for industry benefits are significantly outweighing the costs. In the further drafts of the corresponding provisions the efforts to be made in respect of the notifications were, however, increased in 2016, in particular for the manufacturers of detergents and cleaning agents. This version, which involves a much higher effort for registrants, was submitted for a vote by the Commission. At the same time, further reference was made to the favourable cost benefit ratio although this no longer applies to the submitted version of the Regulation.



The European Commission currently checks whether for certain industries, including detergents, care and cleaning products, the Regulation has still to be amended before the commencement of the mandatory notification in 2020.

### 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, eg 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 obligation to register.

If, for instance, manufacturers of cosmetic products or detergents, care and cleaning products manufacture themselves or import substances in volumes of less than 100 tons per year, they must submit by 1 June 2018 for each of these substances a registration with the European Chemicals Agency (ECHA). In order to be able to use the deadline 1 June 2018, it must be ensured that the substance has already been pre-registered. Any subsequent pre-registration is still possible within six months of the first production or import in an amount of one ton per year or more. It is only possible until 1 June 2017.

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 challenges have been increasingly escalating during the past years:

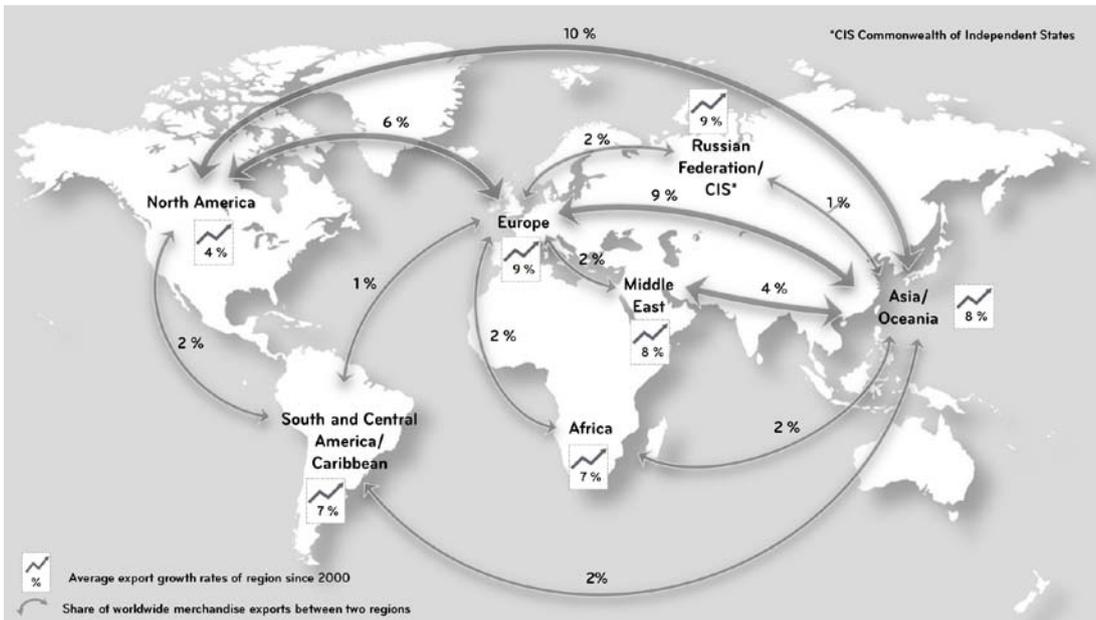
Separation tendencies in the USA and the UK, power politics in Russia and Turkey, nationalisation trends

“We live in a time in which the liberal world order is challenged.”

Prof. Dennis Snower, Ph.D., President of the Institute for World Economy, Kiel, in Spiegel Online, 9 November 2016

in Poland and other European countries, in addition to the challenges in respect of economic growth, refugee issues and terrorist threats.

### WORLDWIDE MARKETS: EUROPE IS THE HEART OF EXPORT BUSINESS



Source: WTO Secretariat, World and Regional Merchandise Export Profiles 2015

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.

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

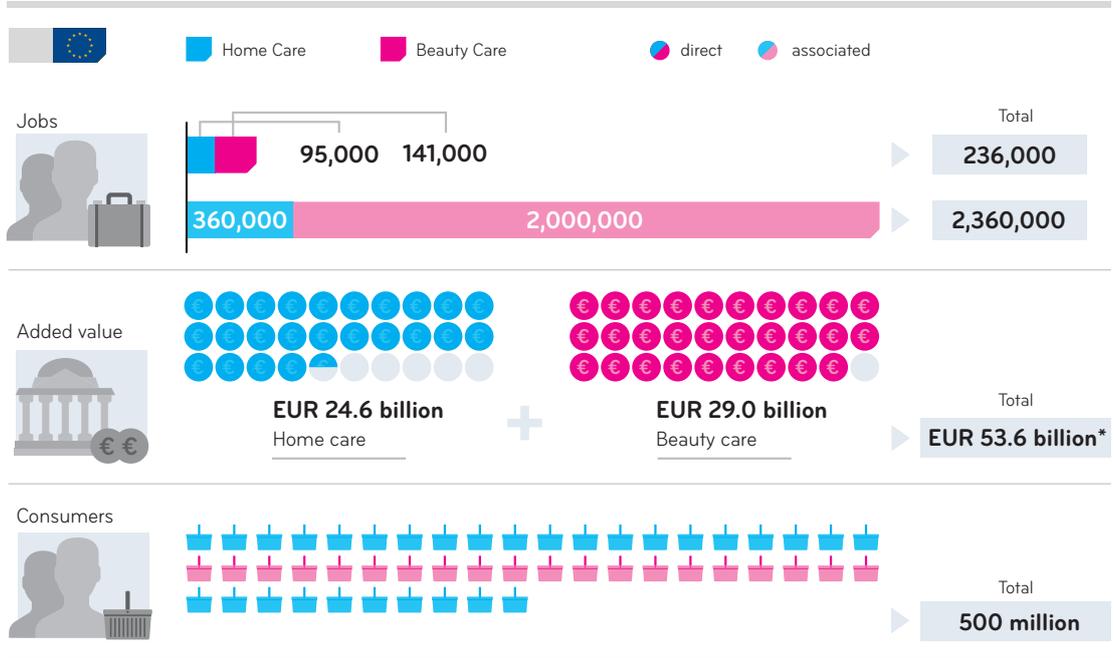
In most countries it stands for sound growth, more than **5,000** production plants and approximately **2.4 million** associated jobs and hence makes an enormous contribution to better living conditions for the Europeans.

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.

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

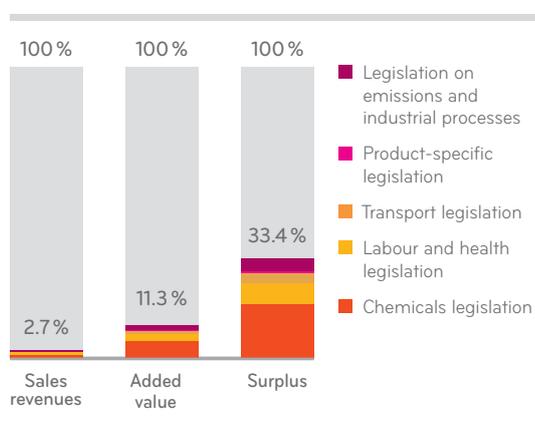


\* IKW estimate based on socio-economic studies by A.I.S.E./Huggard Consulting and Cosmetics Europe/Risk & Policy Analysts 2015 ©IKW

## Our Activities in Europe

IKW, therefore, co-operates 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.

### HIGH COST BURDEN THROUGH LEGAL CONDITIONS



Source: Study EU Commission 2016 – Cumulative Cost Estimate for Chemical Companies (here: washing and cleaning) as a result of the European legislation

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 82% between 2012 and 2015. This has been shown by a survey published by Cosmetics Europe in January 2017.

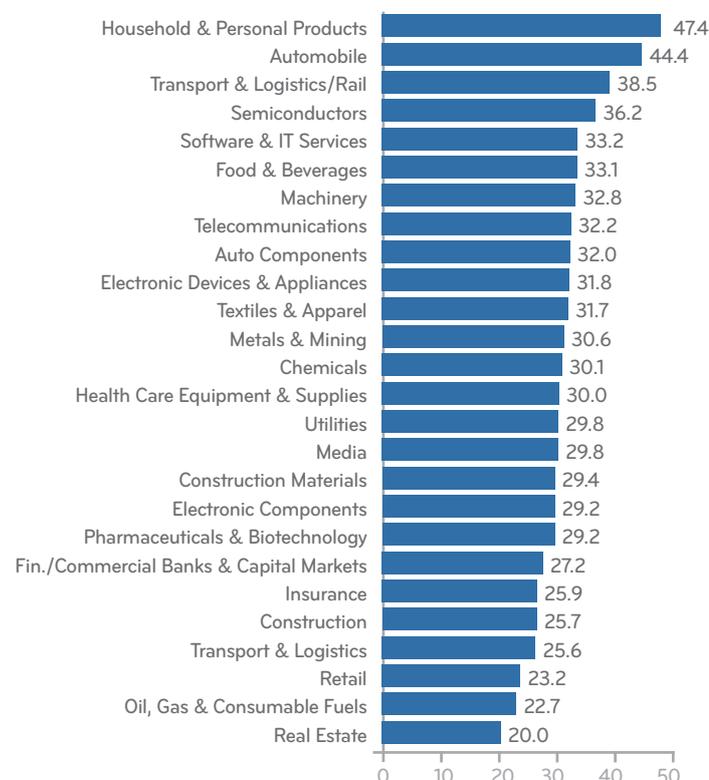
An example which shows that voluntary agreements are effective and that there is not always a need for legislation.

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 essential 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 as the most responsible industry in the world once again, according to the renowned oekom Institute.

### BEAUTY AND HOME CARE WORLDWIDE LEADER AT THE INTEGRATION OF SUSTAINABILITY CRITERIA



Source: oekom Corporate Responsibility Review 2016 (Reporting period 2015)



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