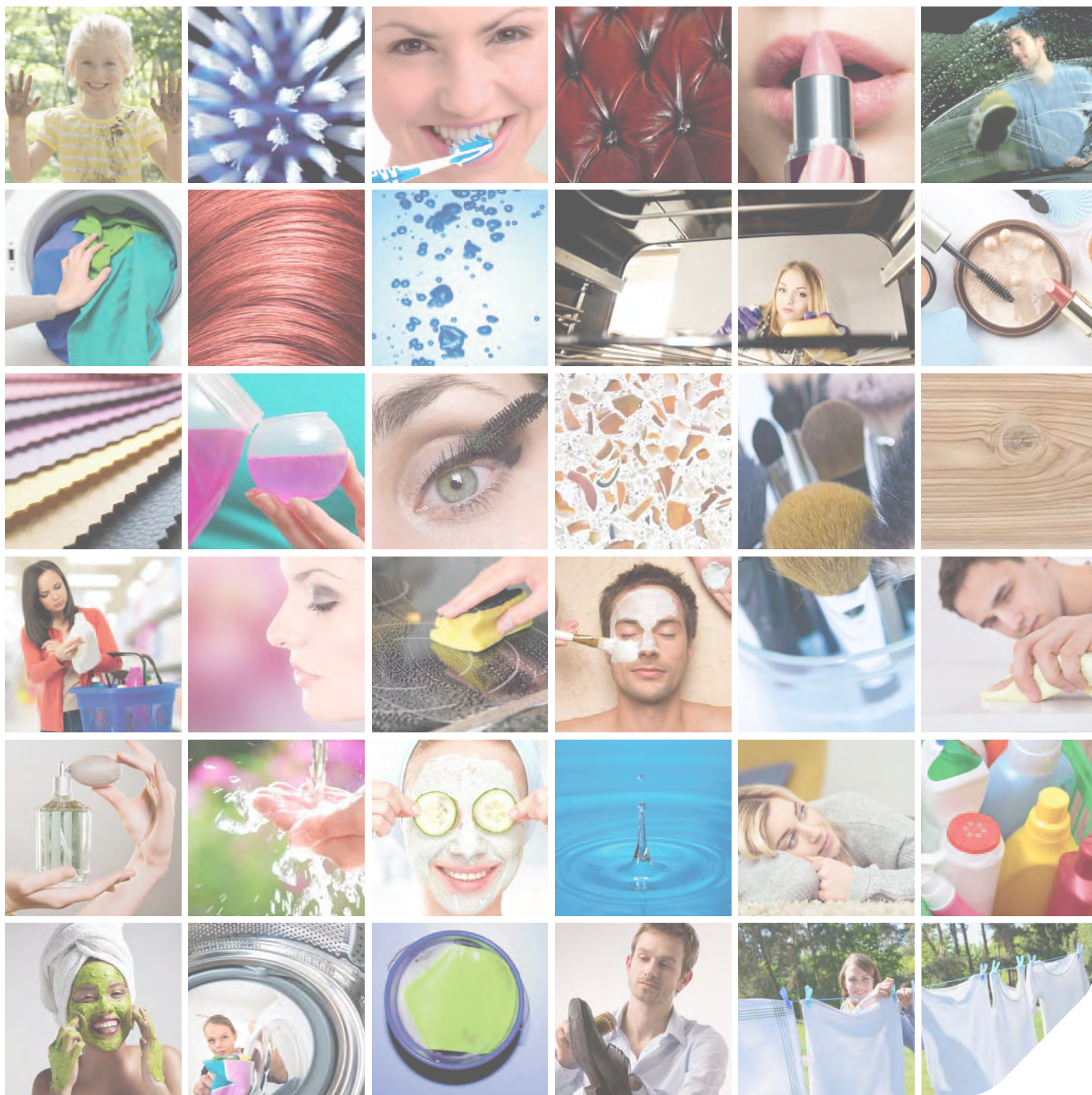


Annual Report 2015. 2016



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.

Dear Madam, Dear Sir,



You would think that the news of the past months would get consumers down. Acts of terrorism, refugee crisis and, more recently, turbulent capital markets could certainly be reason for concerns about the future. However, far from it – the Germans remain in a perfect consumption mood and appear to be unimpressed by crisis reports. The Consumption Climate Index, published by the experts of the Society for Consumption Research (GfK), continued to be on a high level at the beginning of 2016. In this way the consumer confirms, as in previous years, once more his role as a support of the German economic development.

The joy in shopping contrasts, however, with growing concerns in the strongly export-oriented German industry. The bad news from the Middle East, political rejections in the EU and, more particularly, also the difficulties on important foreign markets such as China, make many industrial companies currently take a rather sceptical look of the future according to surveys by the Ifo Institute.

The blurred business prospects of industry have not yet impacted private consumption spending. The labour market appears to be robust and supports the ongoing good domestic demand. And this also promotes the tendency to spend money: saving is unattractive given the low interest rates and the low petrol price leaves extra money in the pockets of the consumers.

The business development of the German retail trade is correspondingly favourable and has been marked in 2015 by record sales revenues and the strongest growth in 20 years¹. The market researchers of IRI Information Resources stress that body care products including baby products boast the highest growth rate within the surveyed consumer goods categories on the mass market. Our two departments, Beauty Care and Home Care, contribute every eighth Euro towards the sales revenues of the food retail and drugstore trade.

According to the analyses by IKW for the past year, the increase in sales revenues amounts to 2.4 percent in our industry – a growth rate which was equally achieved by the two product segments. Consequently, our industry had a good development – significantly ahead of the overall economic growth, which shows a value of 1.8 percent for 2015. We assume that our companies will succeed in continuing the positive growth trend during the coming year.

There are many different success drivers. I would like to focus on two: our companies always succeed in identifying consumer wishes at an early stage and developing attractive products. The most recent nail varnish creations, compacted detergents or trendy hairstyling – at the sales outlets anything which makes life even more beautiful, pleasant and ecological counts. The underlying basis of success is, however, that consumers can rely without any concern on the efficacy and health safety of the products.

The high confidence in the products, which is also expressed, amongst other things, by the positive sales value, is not a matter of course. Although the Germans might be in a buying mood, they do not tend towards a thoughtless shopping frenzy. They are considered as critical – also in an international comparison. According to a current consumer survey² almost 90 % of the consumers are interested in the origin of the products, how they are manufactured and the ingredients they contain. If any information is missing, one-third of the interviewees is ready to change over to another brand.

Reports which challenge the tolerance and safety of Beauty and Home Care products appear time and again in the public. Simple and clear arguments can refute these accusations: products reach the shelves in Europe only after they have proven their efficacy and health safety in comprehensive tests. This is ensured by demanding legal framework conditions and efficient supervisory authorities.

¹ Source: HDE German Confederation of Retailers, General economic information, January 2016.

² Source: PWC, German consumers are critical consumers, January 2016

Studies prove that, for instance, a medically confirmed intolerance is recorded in only 0.01 cases per one million packages of detergents, care and cleaning agents sold. This shows very clearly that the factual-scientific education in connection with products of our daily life is a central task.

The Competence Partners Beauty Care and Home Care within IKW fulfil this task and focus on reliable information in a critical public environment. We are available for all social groups to provide information about health and product safety as well as environmental issues. The exchange with consumer organisations, public authorities and politicians is particularly important for us in this connection. Discussion platforms such as "Dialogue on Cosmetics" or "Washing Forum" but also consumer-oriented action days such as those on sun protection or sustainable washing have established themselves as very successful.

The integration of scientific and legal issues into the reality of life of people plays an increasingly important role in addition to the technical exchange. Consequently, IKW has focused on the further extension of its communication activities – online, with advisory publications, at events or in contact with the media. IKW has also increased the staffing of its communication department.

Different manufacturers have already for some time gained comprehensive knowledge about the value contribution of Beauty Care in everyday life. An important buzzword is "self-esteem". It is considered to be proven that a neat appearance has a positive effect on self-esteem and hence on mental and physical health. If this applies to adults, how pronounced could this effect be in people who are still in the middle of their development, ie teenagers and young adults?

This exciting question has been analysed by IKW together with rheingold salon within the framework of a depth psychological representative study.

The most important results are published in this report and on the website www.ikw-youthstudy.org.

Just as a teaser, looking good is particularly important for today's teenagers. For them the use of cosmetic products is something they urgently need in the turbulent time of puberty and in a frequently fragile social environment: something reliable, an element of safety.

Our society is undergoing constant changes. This can lead to uncertainties but also opens up possibilities. Political developments, technical information and changed market conditions lead to radical social changes. This also means that we re-interpret concepts such as consumption, beauty, home all the time. And this is also reflected by our lifestyle and our demands on the products which accompany us on a daily basis. For IKW member companies this agitated and exciting social environment holds a lot of potential for innovative growth.

Yours sincerely



Dr. Rüdiger Mittendorff

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



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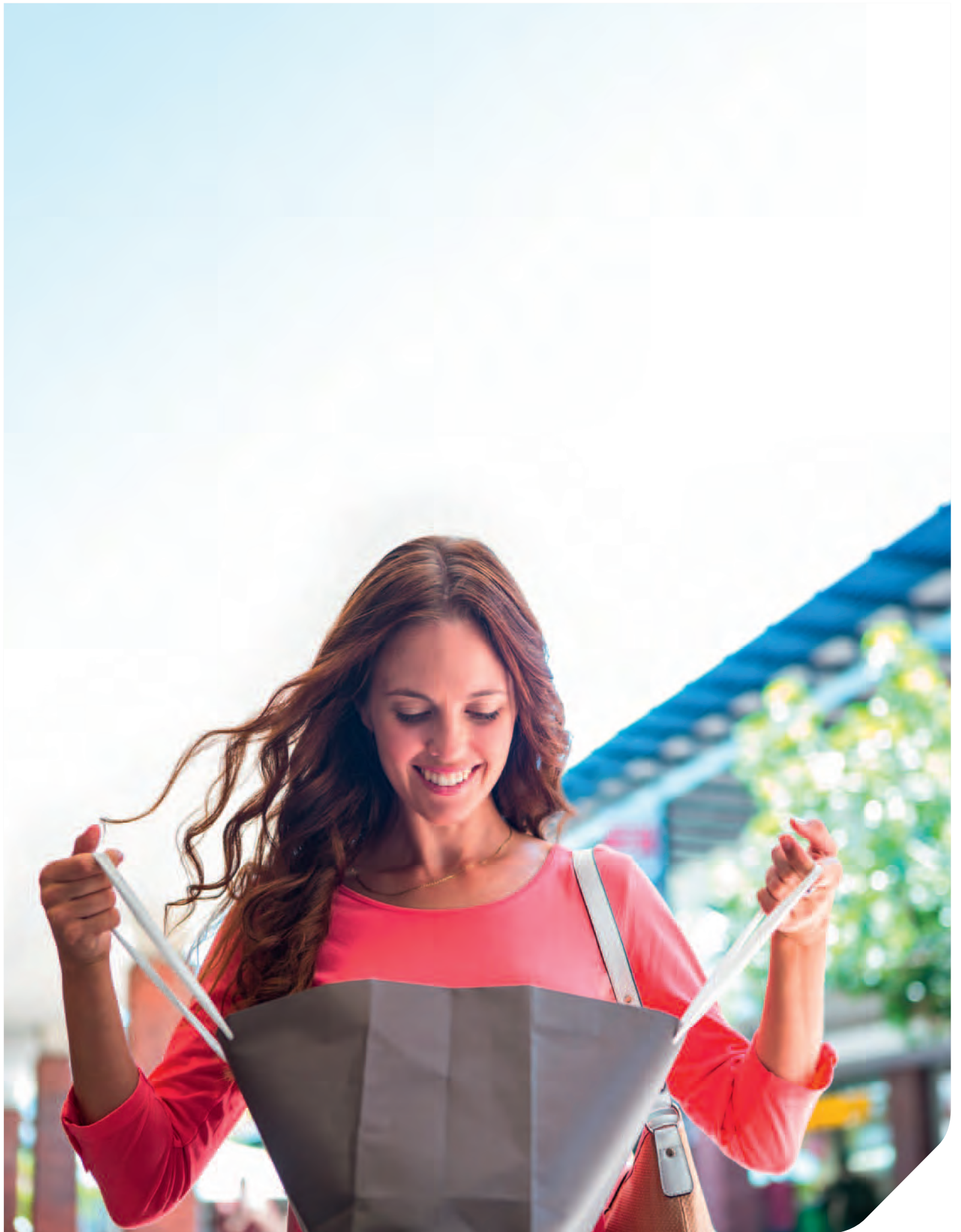
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Future Prospects
Our Activities



32 LIST OF MEMBERS

Ordinary Members
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Memberships



We use Beauty Care and Home Care products every day. They help people to look good and stay healthy, support the cleaning and care of homes, clothes and contribute towards preserving their value. What is more: bodycare products and detergents "fulfil dreams, bolster people up and ensure recognition and self consciousness", as market research stresses. This results in a further rise in the anyway already high consumer acceptance.

As a result of the intensive and professional innovation efforts of our members, the products of the Beauty Care and Home Care industries constitute an important pillar of private consumption in Germany. In 2015 the sales value rose altogether by 2.4 % to EUR 17.9 billion. Beauty Care and Home Care products recorded the same increase by 2.4 %.

The two product segments were again major drivers of the domestic demand

"Retail sales revenues on a 20 year high. 2015 was the year of the buying mood. The consumers' propensity to spend secured Germany's retailers the probably highest rise in sales revenues since 1994 in 2015."

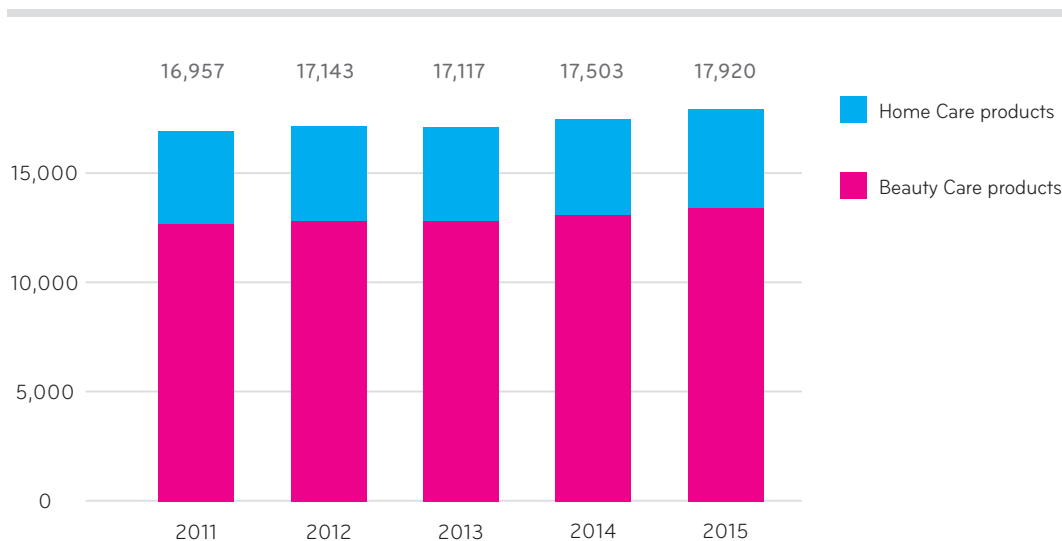
Cosmetics Report 02/16

KOSMETIK
REPORT

with significantly stronger growth rates than the average of branded products. Every eighth Euro¹ is at present spent in the German food retail trade on Beauty and Home Care products. This means that the German market is by far the largest in Europe.

TOTAL MARKET BEAUTY CARE AND HOME CARE PRODUCTS IN GERMANY 2011 – 2015

in million Euro at end consumer prices



¹ Source: IRI Information Resources GmbH

Please note that the 2015 market figures are based on a projection by IKW on the basis of data of IRI Information Resources GmbH for January to September 2015.

Beauty Care Product Market Germany 2015

The sales value of Beauty Care products rose in 2015 by EUR 317 million to a total of EUR 13.4 billion; this corresponds to an increase by 2.4 %. The development is based on an ongoing high per capita spending of EUR 148 / year and, more particularly, high-quality market launches. Natural cosmetics, which now account for a 9 % share in the overall market and recorded a growth of 9.2 %, are becoming particularly important. The strongest segments are face and bodycare as well as showering and bathing. Growth in Beauty Care was generated on a broad basis across almost all trade channels.

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. Despite an ongoing strong competitive pressure, this category has been able to maintain its high significance on the market.

2. SKIN AND FACE CARE PRODUCTS

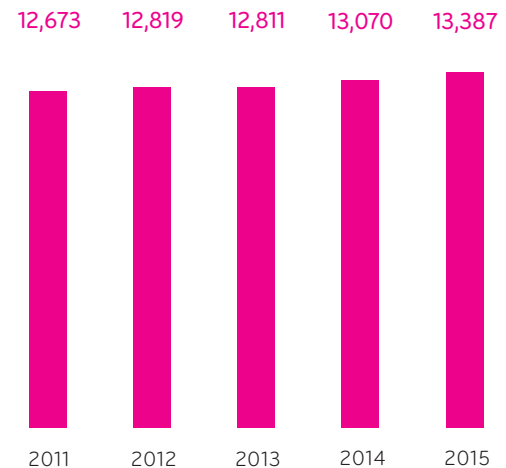
With a market share of more than one-fifth, skin and face care products represent the second largest sub-market in Beauty Care. With a growth of 4.9 % to likewise almost EUR 3 billion they are hence only slightly behind haircare products.

3. DECORATIVE COSMETICS

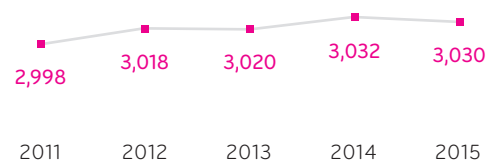
With 12 % of the overall market and a growth of 4.2 % to EUR 1.6 billion, decorative cosmetics were able to further develop their position as third largest segment. The sales value increased by EUR 65 million, supported by attractive offers for consumers and innovative new products.

OVERALL MARKET INCREASES

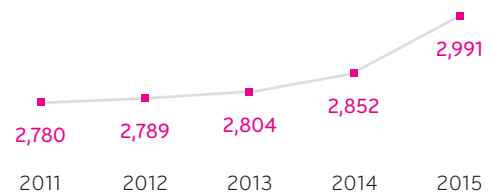
in million € at retail sales prices in Germany 2011–2015



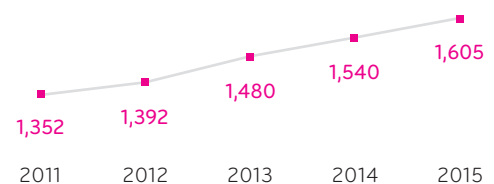
1 HAIRCARE PRODUCTS in million €

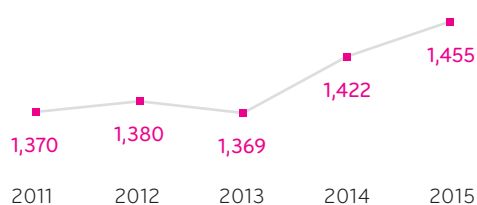


2 SKIN AND FACE CARE PRODUCTS in million €



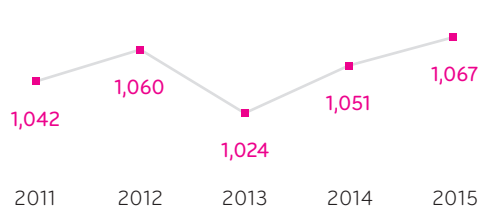
3 DECORATIVE COSMETICS in million €



4 ORAL AND DENTAL CARE PRODUCTS in million €

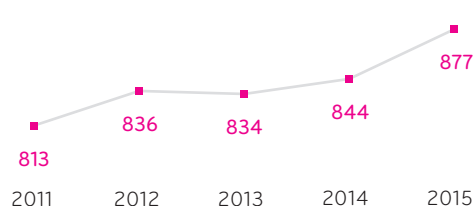
4. ORAL AND DENTAL CARE PRODUCTS

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 2.3 % they had a similar development as the overall market. Supported by higher priced launches, they rose by EUR 33 million to EUR 1.5 billion.

5 LADIES FRAGRANCES in million €

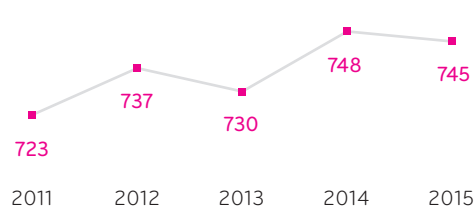
5. LADIES FRAGRANCES

With a sales value of little less than EUR 1.1 billion, ladies fragrances represent more than 8 % of the overall market. In 2015 the trend towards higher value brand and luxury products remained unchanged.

6 BATH AND SHOWER PREPARATIONS in million €

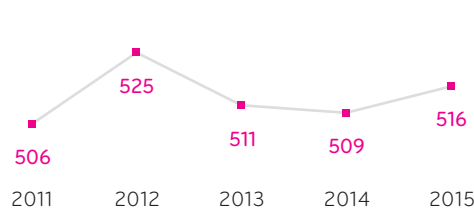
6. BATH AND SHOWER PREPARATIONS

The market for bath and shower preparations recorded a significant above average growth of 3.9 % to EUR 877 million.

7 DEODORANTS in million €

7. DEODORANTS

Deodorants were able to almost maintain their total sales value of now EUR 745 million.

8 MENS FRAGRANCES in million €

8. MENS FRAGRANCES

The market for mens fragrances continues to be based primarily on established brands and increased by 1.5 % to EUR 516 million.

9. SOAPS AND SYNDETS

The market segment soaps and syndets was able to maintain its level, as opposed to the previous year and grew by 2.9 % to EUR 370 million.

10. SHAVING CARE PRODUCTS, AFTERSHAVES AND PRESHAVES

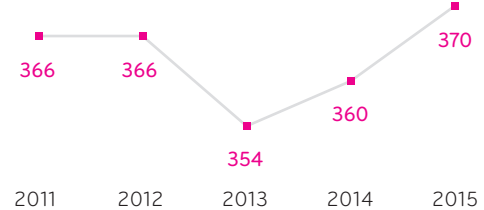
The product range of shaving care products, aftershaves and preshaves continued to be under strong pressure in 2015. The market volume dropped by 2.5 % to EUR 239 million.

11. OTHER BEAUTY CARE PRODUCTS*

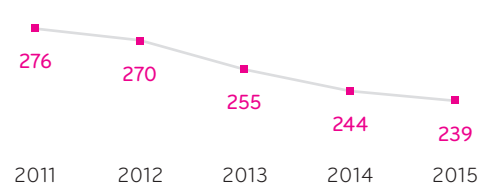
The sales value of other Beauty Care products recorded an increase by 5 % to EUR 493 million in 2015. Depilatories declined by 2.0 %. The market volume dropped to EUR 138 million. The segment of babycare products increased slightly to EUR 146 million. Footcare products should be stressed, since they were able to increase their sales value through innovations by 11.8 % to EUR 209 million.

* Footcare products, depilatories and babycare products without shampoos, bath and shower preparations / soaps

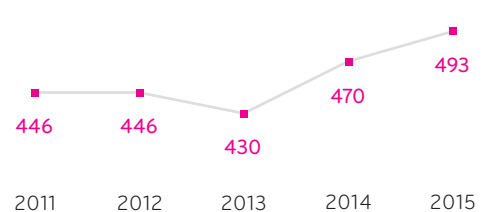
9 SOAPS AND SYNDETS in million €



10 SHAVING CARE PRODUCTS, AFTERSHAVES AND PRESHAVES in million €



11 OTHER BEAUTY CARE PRODUCTS* in million €

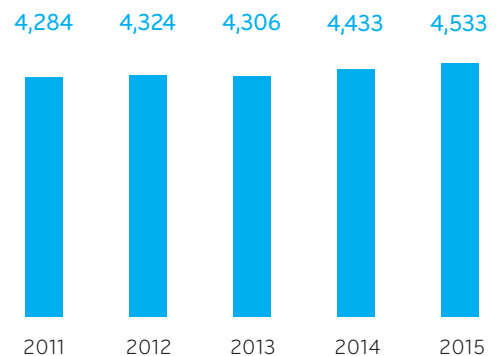


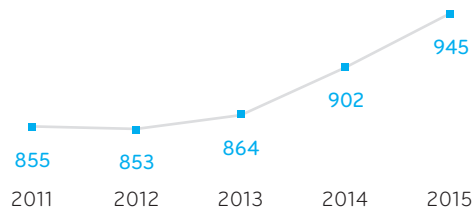
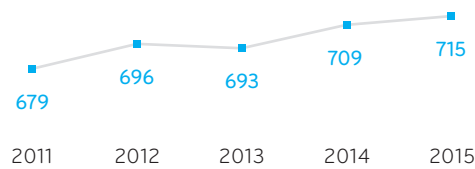
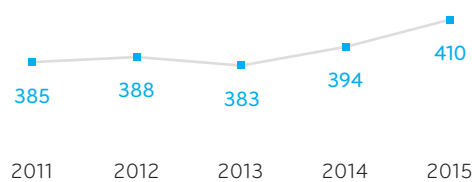
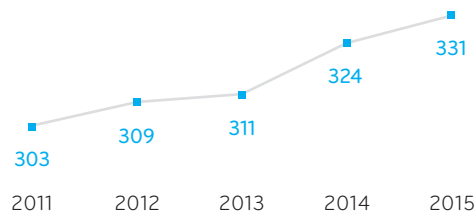
Home Care Product Market Germany 2015

During the reporting year 2015 the total market of Home Care products grew by 2.4 % and EUR 100 million to EUR 4.5 billion. The trend towards practical small packages and attractive consumer offers has strengthened this development. Hypermarkets continue to represent the largest distribution channel, albeit with a slightly below average growth of 1.9 %. Drugstores are the second largest channel with the highest growth rates of 7.9 %.

OVERALL MARKET INCREASES

in million € at retail sales prices in Germany 2011–2015



1 HEAVY-DUTY LAUNDRY DETERGENTS in million €**2 HARD SURFACE CLEANERS *** in million €**3 DISHWASHING DETERGENTS** in million €**4 AIR FRESHENERS** in million €**5 FABRIC CONDITIONERS** in million €**1. HEAVY-DUTY LAUNDRY DETERGENTS**

Heavy-duty laundry detergents are by far the 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 1.2% and EUR 15 million.

2. HARD SURFACE CLEANERS*

Hard surface cleaners represent with a share of around 20% the second largest segment within Home Care. A significant plus was recorded, which involved a rise by 4.8% or more than EUR 40 million to EUR 945 million. WC cleaning agents, pipe and drain cleaning agents as well as special cleaning agents recorded strong growth.

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

3. DISHWASHING DETERGENTS

The third largest segment is the market for dishwashing detergents which increased by 0.8% and hence below average. This corresponds to a growth of EUR 6 million to a total of EUR 715 million.

4. AIR FRESHENERS

The market for air fresheners rose by 4.1% to EUR 410 million in 2015.

5. FABRIC CONDITIONERS

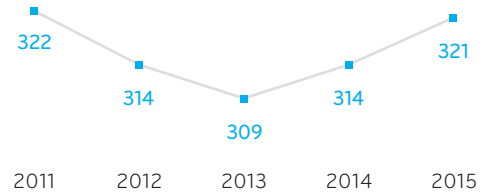
Fabric conditioners generated a plus of 2.3% - with a growth of EUR 7 million to EUR 331 million.

6. LAUNDRY ADDITIVES*

The market for laundry additives exceeded the 2014 level and rose by 2.1% to EUR 321 million. This meant that the decline in development of the previous years changed in this product category.

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

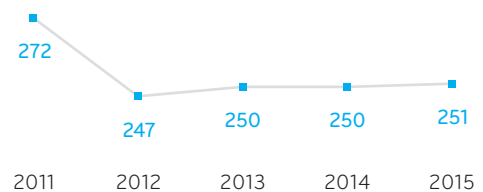
6 LAUNDRY ADDITIVES* in million €



7. AUTOMOTIVE CARE

The market for automotive care maintained its sales value of EUR 251 million on the same level as last year.

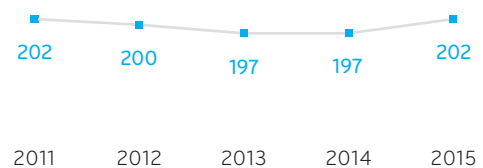
7 AUTOMOTIVE CARE in million €



8. LIGHT-DUTY AND SPECIAL DETERGENTS

The sales value of light-duty and special detergents increased by 2.3% to EUR 202 million.

8 LIGHT-DUTY AND SPECIAL DETERGENTS in million €

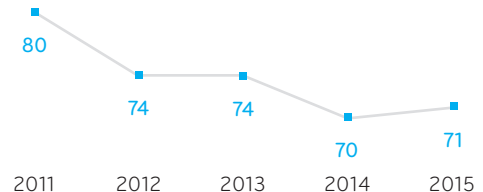


9. FURNITURE, FLOOR AND CARPET CLEANERS*

The sales value of furniture, floor and carpet cleaners increased in 2015 by 1.1% to EUR 71 million.

* Reinigungs- und Pflegemittel für Fußböden und Steine, Möbel und Polituren

9 FURNITURE, FLOOR AND CARPET CLEANERS* in million €



10. LEATHER CARE PRODUCTS

The market for leather care products remained unchanged on the same level as in 2014 with EUR 67 million.

10 LEATHER CARE PRODUCTS in million €



Market Conditions

The changes in the distribution channels, which were triggered by the insolvency of a major drug-store chain several years ago, have been definitively overcome. 2015 was clearly placed under a positive sign as far as consumption was concerned. Even if the market environment was marked by crises, wars and conflicts abroad, exhaust gas and corruption scandals, the Greece and China crisis and currently the refugee issue in Germany, private consumption – more particularly also in the branded products industry – made an essential contribution towards the good business development.

With a high innovative pressure and increased competition activities our member companies secured above-average market growth in Beauty and Home Care. The growing expansion of large drugstores and the modernisation of existing sales areas made yet another contribution to the good development.

On the market for Beauty Care products drugstores hence remained by far the most important sales channel with a market share of almost 45 % and more than 4.5 % growth. However, discounters are likewise growing significantly with 3.3 %. The traditional food retail trade and hypermarkets have, by contrast, partly lost considerably.

As far as Beauty and Home Care products are concerned, consumers spent per capita on average EUR 211 and hence one Euro more versus prior year.

Outlook 2016

In 2015 the market for Beauty and Home Care products in Germany rose despite international crises and conflicts by 2.4 %. The innovative products of the industries represented by IKW as well as the positive development of the general consumption climate in Germany were the underlying drivers.

In 2016 the business community and political circles are facing further challenges. Both the domestic and the foreign trade must make their way in an increasingly turbulent environment. The refugee crisis and terror risks are overshadowing business-related issues at the beginning of the year such as the China crisis or the reform deadlock. On the other hand, a weak Euro and extremely low raw material prices provide for an uptrend.

Domestic demand continues to generate a lot of hope. The foreseeable low interest rate and the high consumption tendency of consumers imply a positive development. Whilst the Ifo business climate dropped at the beginning of the year and the Ifo Institute warns, GfK reports a rather positive tendency with the consumption climate rise in January.

"The German business community looks with fright into the new year."

ifo business climate Germany, results of the ifo business development test in January 2016

ifoInstitut

An ongoing satisfying development will be decisively dependent on the economic and structural policy environment.

For Germany as a business location, political circles are facing major tasks: solutions of the refugee issue, farsightedness 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.

"Consumers continue to have a perfect purchasing mood. The trend towards more conscious consumption continues."

Dr. Robert Kecskes, GfK SE



IKW anticipates a further intensified competition amongst its member companies in 2016 which will certainly result again in innovations with relevant added value for consumers. Against this backdrop, IKW forecasts another moderate growth of the market for Beauty and Home Care products. This is likely to be supported, as during the past years, by a constant orientation of consumers towards health and sustainability – a trend which continues to remain significant for any actions by industry.

INTERDISCIPLINARY
ACTIVITIES



Medium-sized Businesses

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

At the 2015 spring meeting these were on the one hand progress reports about the regions Middle East and Singapore. Marco Lustenberger, delta pronatura, reported vividly about the market entrance strategy of his company in countries like Qatar, Saudi Arabia and the United Arab Emirates. Nasyr Birkholz, BB by Berlin, shared his experience in the United Arab Emirates, Iran, Iraq and Syria with the audience. Ulrich Maith, dm-drogerie markt, analysed the private label development of his trading company. The presentations by Ingo Wolters, GS1 Germany, and Bert Martin Ohnemüller, neuromerchandisinggroup, focused on requirements to be met by trade and industry. Ingo Wolters explained the systemic demands in supplies for co-operation both with the retail trade and industry. Bert Martin Ohnemüller suggested to be 'courageous enough for new acting'. Tips were provided on how to better understand people and hence customers through the results from brain research and evolutionary biology.

"Support by IKW plays a decisive role in particular for medium-sized businesses."

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



The focal topic of the autumn meeting was sustainability. Dr. Robert Kecskes, GfK, addressed the topic from a consumer point of view. His theory: the interaction with consumers will increase. Reinhard Schneider, Werner & Mertz, presented the sustainability strategy of his company.

"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





IKW SME Meeting, Spring 2015, Bad Homburg

Kaiyin Li, International Enterprise Singapore, Marco Lustenberger, delta pronatura Dr. Krauss & Dr. Beckmann KG, Nasyr Birkholz, BB by Berlin GmbH, Heinrich Beckmann, delta pronatura Dr. Krauss & Dr. Beckmann KG, Ingo Wolters, GS1 Germany GmbH, Thomas Keiser, IKW, Ulrich Maith, dm-drogerie markt GmbH + Co. KG, Bert Martin Ohnemüller, neuromerchandising group gmbh & co. kg, Dr. Rüdiger Mittendorff, Sebapharma GmbH & Co. KG

Professor Günther Bachmann, German Council for Sustainable Development, stated: "Sustainability policy in Germany always means to deal with conflicting goals." During the final discussion round a joint request was formulated: Move towards sustainability with more co-operation between the retail trade and industry together and with more perseverance. During the afternoon Leonhard Diepenbrock spoke about his development from a dowel manufacturer to a moderator and brand designer.

Finally Professor Hans-Willi Schroiff presented the most recent findings from the field of neuro-marketing and their impact: packaging and labels are the most important communication means.

Apart from these meetings, IKW staged for the first time in early 2016 a Category Management Workshop in co-operation with the Society for Consumption Research and a special focus on the needs of medium-sized businesses. On the basis of current market research methods, possibilities of an even more effective category management were presented and illustrated by examples.



BeautyEurasia 2015, Istanbul

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 fair fairs (these have been accepted by the foreign fair program of the German Federal Ministry for Economic Affairs and Energy). 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 Federal Ministry for Economic Affairs and Energy, 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.

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>.



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 labeling elements which are relevant for safety on the packaging in German language.



Awarding of certificates to the first eight graduates of the English courses

COSMETICS-GMP AND SAFETY ASSESSMENT

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

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). Meanwhile the first 8 participants have successfully completed all of the 7 courses and received their certificate for the series on February 18th 2016; the German courses have been completed by 89 participants.

"Consumers expect cosmetic products to be safe and effective. The manufacturers ensure that these expectations are met."



George Held, Vice Chairman of the IKW,
L'Oréal Germany GmbH



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/fileadmin/content/downloads/Sch%C3%B6nheitspflege/2015-12-02_IKW_General_Guidance_Cosmetics.pdf

HIGH LEVEL OF SAFETY

Cosmetic products have a high level of safety and compatibility. Nevertheless even under correct use, individual tolerances 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, 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 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.

"We have conducted this study to learn what is important for adolescents and young adults on the transition to adulthood. We wanted to see what influence does taking care of their appearance have on the self-esteem of young people. The results were surprising: 85 % of the adolescents and young adults use cosmetics and beauty products to feel better and safer."

Birgit Huber, Head of the Department Beauty Care within IKW





Legal Regulations

CLASSIFICATION AND LABELLING

2015 involved striking changes for the packaging of many detergents and cleaning agents as a result of the implementation of the Global Harmonised System for classification and labelling. For many formulas of detergents, care and cleaning products, the very conservative provisions of GHS mean that they have to be labelled as eye-irritating or damaging even if the formula is unchanged and the products can continue to be used safely. Surfactants must be rapidly and completely biodegradable to be used in detergents and cleaning agents. Although the surfactants cannot cause any longer term effect on the environment, some products have to be labelled as chronically hazardous to waters in accordance with GHS. This results in additional labelling elements which are, however, irrelevant for consumers.

Some of the GHS provisions have also been challenged by consumer protection organisations. Stiftung Warentest stressed in the July 2015 issue of the magazine:

"The obligation to print danger symbols and warnings even on hand dish-washing detergents is excessive. Our analysis proves: Most dishwashing detergents contain mild surfactants that are also used in shower products and shampoos. Their skin tolerance is good; the waste water burden is low. Excessive labelling causes uncertainty and can even become dangerous. The habituation effect might result in consumers no longer taking seriously the warnings on really aggressive products like drain and toilet cleaners."

Dr. Konrad Giersdorf, Stiftung Warentest



The transitory provisions for products, which have been produced until 31 May 2015 according to the applicable law and were released for sale to third parties, are implemented in conformity with the regulation in Germany so that mixtures may be distributed until 31 May 2017 to the retail trade or consumers.

DETERGENT REGULATION

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. This must include all phosphorus compounds, including phosphates and phosphonates. All dishwashing detergents, which are made available by the manufacturer to the trade by 31 December 2016, may subsequently be marketed by the retail trade without limitation in time.



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. 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 2016 is Klaus Müller, Executive Director of the Board of the Federation of German Consumer Organisations (vzbv). He writes in his complimentary message: "Of course household questions such as washing, dishwashing and cleaning should not become a scientific task, but in particular as far as the right use of detergents and dishwashing detergents is concerned, many consumers are still convinced that 'a lot helps a lot' In times of compact detergents and concentrated dishwashing detergents this formula is, however, no longer true."

Sustainability Conference and Player Workshop 2016

On 28 / 29 January 2016 the 14th Player Workshop of FORUM WASCHEN took place in Berlin with a sustainability conference. The subject was: "Promote the sustainable consumption of consumers – challenges, perspectives and options for action". Introductory speeches were made, amongst others, by:

- Gerd Billen, State Secretary at the Federal Ministry of Justice and Consumer Protection
- Dr. Ulf D. Jaeckel, Head of Sustainable Consumer Protection Policy, Product-related Environmental Protection with the Federal Ministry for the Environment, Nature Conservation, Building and Reactor Safety

During the subsequent panel discussion, the following experts participated in addition:

- Bärbel Höhn, Chairwoman of the Parliamentary Committee for Environment, Nature Conservation, Building and Reactor Safety
- Ingmar Streese, Division Head for Consumer Policy with the Confederation of Consumer Protection Organisations
- Dr. Reinhard Büscher, Head of the Chemical Industry Unit, Directorate General Growth of the European Commission
- Thomas Keiser, Managing Director, IKW.

REPORT ABOUT THE WORK OF THE PROJECT GROUPS WITHIN FORUM WASCHEN

In 2015 the project group "Washing at low temperatures" completed the flyer "Washing at 30 °C or lower: when does it make sense, when not?". It was published in February 2016. FORUM WASCHEN explains in this flyer that the selection of low washing temperatures contributes towards energy savings during washing and how consumers should allocate their laundry in the household to the respective proper temperature. In this connection it is pointed out that certain laundry loads and washing machine hygiene require to wash at least once a month at 60 °C.

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 2014 14.5 billion packages were sold and 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 2014	Number of cases per 1 billion sold packages
Inquiries by Doctors	45	3
Medically confirmed	26	2
Skin Irritations	Total number of cases from 2006 to 2014	Number of cases per 1 billion sold packages
Described plausibly by the consumer	3,918	270
Medically confirmed	111	8

"Detergents and cleaning agents, fabric conditioners, products for stain pre-treatment or washed laundry only cause allergies in extremely rare cases. This is also pointed out by the data of the Information Group of Dermatological Hospitals (IVDK)."



Professor Dr. med. Johannes Geier, Integrated Information Network of Dermatological Hospitals (IVDK), Institute at the University of Göttingen

Technical Topics

In the Working Group "Shoe, Leather Care Agents, Impregnation Agents", the IKW Recommendation on the quality assessment (EQ) "Compatibility of Shoe Uppers with Care Products" was updated. It is used by European and Asian test institutes. It was published in March 2016 in the SOFW Journal in English and German. During the reporting period the EQ Dishwashing Detergents was likewise completed which represents an update of the "Methods for Ascertaining the Cleaning Performance of Dishwasher Detergents (Part B)" from 2006. The publication of the update is planned for June 2016 in the SOFW Journal.

"The IKW Recommendations on quality assessment developed together with international test institutes are used throughout the world for the performance assessment of cleaning and care agents and for the cleaning agents' resistance of surfaces."



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



Future Prospects

The IKW member companies are confronted in an increasingly globalised world with always stronger international turbulences, also and above all in Europe and at the same time with the national market environment in Germany marked by intense competition.

At the beginning of last year we still asked: "When was the 'old world' last faced with such a political, intellectual, moral and economic challenge with an open future?". 12 months ago the experts were still split over their assessment of the future. At the beginning of 2016 the description of the situation has significantly worsened. The past year seriously affected the EU. The coming year might be even tougher and more dramatic. The current crisis "has the potential of disintegrating Europe" is a description of the situation at the beginning of the year not only by the N24 news programme.

As a matter of fact, the future perspective of Europe is questionable. America's political elites have no

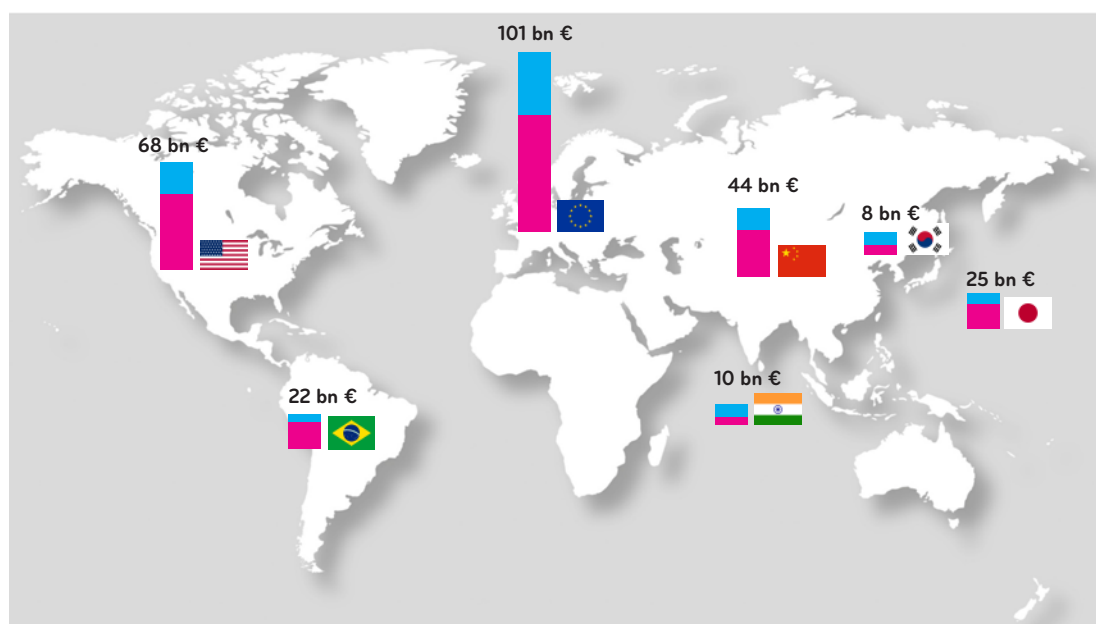
longer any confidence that Europe will be able, due to the uncertain situation, to control itself and its neighbouring regions. And even the Bulgarian visionary Baba Wanga is quoted with her 1996 prediction "In 2016 Europe will cease to exist".

One can be as pessimistic as that – but one does not have to be. What will be decisive for a positive development is, however, a quick solution of the major crises. And apart from that, the important questions on economic framework conditions may not be fully overlaid and neglected.

Consumer demand continues to be a pillar – at least in Germany. This applies above all to the stable development of the Beauty and Home Care markets which contribute towards growth, jobs and prosperity in Europe.

With a market volume of more than EUR 100 billion, Europe is the world's largest market for Beauty and Home Care products and boasts sales revenues which are approximately as high as those of the USA and China together.

WORLDWIDE MARKETS: EUROPE IS WITH MORE THAN EUR 100 BILLION THE LARGEST MARKET FOR BEAUTY AND HOME CARE PRODUCTS WITH A STABLE DEVELOPMENT



Source: IKW Statistics 2014 (rsp), Cosmetics Europe, Kline&Company, JClA, JDMA, JSDA, Euromonitor, Europe: EU28 + Norway + Switzerland

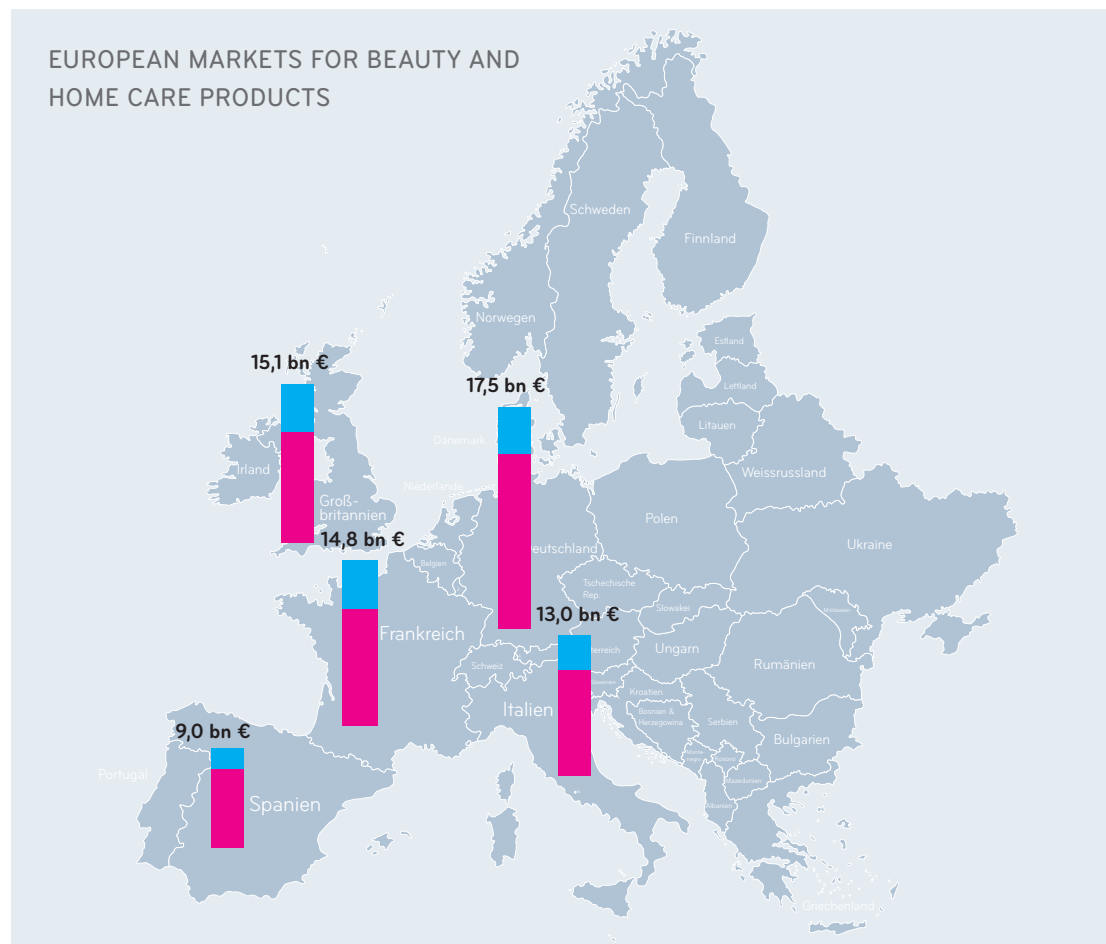
According to the most recent socio-economic studies the cosmetics and detergent industry in Europe generates a gross added value – a contribution to prosperity – of EUR 54 billion per year.

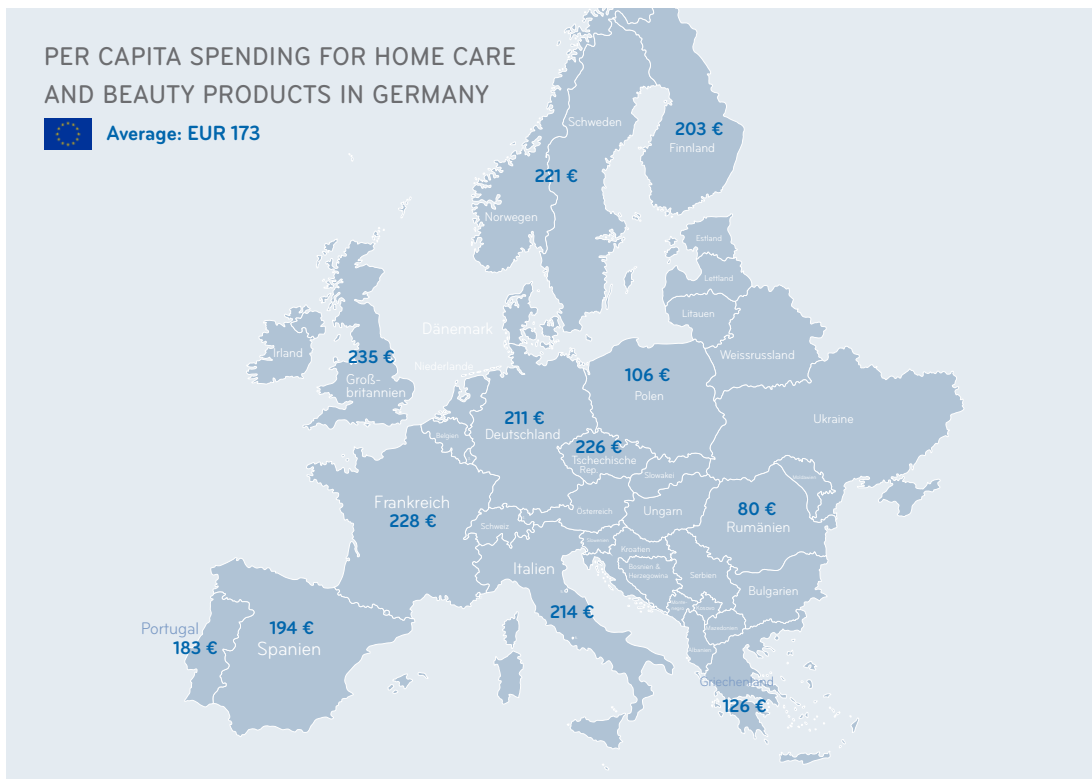
The industry stands in most countries for sound growth, more than 5,000 production plants and approximately 2.4 million associated jobs and hence makes an enormous contribution to better living conditions for the Europeans.

Within Europe Germany is by far the largest market, followed by the United Kingdom, France, Italy and Spain. Consumers spend in Europe on average EUR 173 per year in our categories.

The German consumers spend on average EUR 211 per capita for Beauty and Home Care products and are hence significantly ahead of the European average.

The acceptance by the consumers clearly reflects their trust in the products. Justifying this trust and securing it on a European level will continue to be the remit of IKW.





Our Activities

IKW, therefore, co-operates intensely with its European sister associations, A.I.S.E and Cosmetics Europe, amongst others, in order to channel the flood of regulations reasonably and in a way which can be understood by the consumer. Corresponding examples include in the field of Beauty Care the education courses for safety assessors which IKW has 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. During the reporting period the first eight persons passed the English course cycle successfully. Further topics are the standardisation of the recording and notification

of serious undesired effects, which are likewise legally prescribed or the elaboration of a European recommendation by Cosmetics Europe to replace by 2020 solid plastics particles in products to be rinsed off again (eg peelings) by alternative substances.

In the field of Home Care the initiative of the European Commission "Better Regulation" is an important topic. Within the framework of this project is to be checked, amongst others, whether the chemicals legislation meets its goals efficiently. From the viewpoint of A.I.S.E. and IKW there is, more particularly, a need for improvement concerning the labelling of substances and mixtures according to the Global Harmonised System (GHS) because some labelling elements are not very helpful for the users. A restriction on the essential information for a safe handling of detergents, care and cleaning agents would make sense (including "keep out of the reach of children").

For scented candles and other products, which are burned indoors and emit fragrances, the project Product Stewardship Project Air Fresheners was extended and updated.



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