Annual Report

2012, 2013
The Federal Statistical Office recently stated that the German economy did well in 2012, especially in comparison with the rest of Europe. For 2012, there is an expected growth of the gross domestic product by +0.7% after a real growth of economic performance by 3.0% in 2011.

Last year’s national growth primarily resulted from consumer spending (+0.6%) and trade balance/export - import (+1.1%), whereas the gross investments were declining.

Against this background, the two markets represented by IKW reflect similarly positive developments – cosmetics show a growth of 1.4% (12.9 billion €) and household maintenance products show a growth of 0.9% (4.3 billion €).

Details about the various submarkets can be found in this annual report.

Currently, there are several economic indicators supporting a continuation of the positive development in 2013. To provide an example – the available income of private households has been increasing annually by 2 - 3%, the only exception being a slight declining trend in the crisis year of 2009. This resulted from a continuous increase in net wages and salaries, as well as a lower unemployment rate of 7.6% in 2012.

In order to enable future growth in the markets relevant for us – cosmetics and household maintenance products – IKW will more intensively push for the reduction of national and European regulatory density, which constitutes a threat towards innovativeness in our industry and an increasing cost burden for the companies represented by IKW. Sustainable actions can only be implemented, if there is a recognized compromise in society, which all participants need to jointly compile. Several companies, represented by IKW, from the cosmetics and detergents Industry have initiated promising projects over the last years.

We need to have a social consensus in order to achieve the environmental and socio-political goals – without straining the budgets of the private households. Forum Washing and Dialogue Cosmetics, both initiated and supported by IKW, demonstrate several examples how necessary paradigm shifts can be activated on all levels.

The annually calculated innovation index of the federal government shows that Germany’s ranking decreased to rank 6, two less than before. In this environment, it is hindering, that the EU Commission prohibited the sale of cosmetics products which contained any substances tested on animals. This limits the possibilities of innovation in areas where there haven’t been any known alternatives to animal experiments.

Germany’s energy politics have recently been adjusted towards regenerative energy, causing an increase in energy costs. This topic will tactically be avoided due to the upcoming Bundestag elections in the fall of 2013, leaving very little room for optimism that such abashments will be tackled.

Whichever way the election results may turn out, IKW will continue to support and defend its members’ interests in the manner described above. Consumers can feel sure that safe, environmentally friendly, and fair-priced products will be available to them on the market.

In order to guarantee this, we will rely much more on the cooperation between the member companies and regional politicians of the national and EU parliaments.

Sincerely,

Dr. Rüdiger Mittendorff
Chairman
IKW represents corporations whose products are close to the people. The beauty care products increase the consumer’s health, beauty, and well-being, by aiding the cleansing and caring of each individual. Home care products are necessary in terms of cleaning the home, clothes, shoes, and cars, with the goal of maintaining their quality.

Beauty and home care industries are important pillars for the private consumption in Germany. The sales in both fields increased in 2012; beauty care products sales increased by 1.4 % compared to 2011 and home care products sales increased by 0.9 %. Hereby both product ranges were important influences on the domestic demand.

In 2012, the expenses for beauty care products increased by 178 million Euros to 12,851 million Euros, equaling an asset of 1.4 %. Overall, 3.4 billion beauty care products are sold per year in Germany\(^1\). On average, German consumers spend 131 Euros per year\(^2\) on beauty care products, 2 Euros more than the year before. With the exception of dental care products, the action sales in every other category of beauty care products increased. An additional 92.7 million Euros were reached by this\(^1\).

Hair care products make up a quarter of the beauty care market, with total sales of 3,018 million Euros. With a growth of 0.7 % they were the biggest commodity group of the 2012 market. This category managed to grow (unlike last year) despite the competitive and pricing pressure. There is a visible trend towards products with a professional background for favorable prices, which enabled an increase of price for brands. The higher appreciation on the market becomes especially apparent through new products for hair oils and treatments.
Skin and face care products make up the second largest sub-segment in beauty care (with a market share of over one fifth). They increased to 2,796 million Euros; an increase of 0.6%. However, with these numbers, they remain behind the development of the total market. In the past, anti-aging products were the market fuel, but nowadays facial moisturizers dominate sales, through new market impulses like the innovative Blemish Balm Creams (BB Creams). The obvious increase of demand for products for mature skin reflects in the rising age average of the population.

Oral and dental care products make up the third biggest segment, with a market share of slightly more than one tenth. With an increase of 1.5%, they managed to continue their success by 20 million Euros up to 1,390 million Euros.

The commodity group decorative cosmetics, is the fourth largest segment (just after oral and dental care products), making up more than 10% of the total market. It was able to grow by 2%, up to 1,379 million Euros. The introduction of higher priced nail polish is the main driver of this increase, despite this trend decreasing slightly in 2012. Due to innovative products (i.e. Nailpolish or facial powder), the segment of decorative cosmetics was able to contribute 27 million Euros to the total sales.

Fragrances for women make up more than 8% of the total market, with 1 billion Euros in sales. The trend towards more exclusive and luxurious products continued throughout 2012. Brand products continue to overtake private labels in terms of market share sales. The saying “Luxury sells” also applies in times of financial crisis.

Bath and shower preparations were the segment with the strongest growth impulse among all beauty care products. This product category showed a clear increase in growth, with a plus of 4.5%, contrary to 1% in 2011. The trend that consumers create adventure worlds was visible in wellness oriented products. Consumers bought shower gels and bath preparations, in order to bring the spa experience to their home. Bath and shower preparations increased sales by 37 million Euros, up to 850 million Euros.

The group of deodorants increased by 2%, which amounts to sales of 14 million Euros to a total growth of 737 million Euros.
In the segment men’s fragrances, traditional brands bring the success. With positive “market stories” surrounding the products, they increased by 17 million Euros up to 523 million Euros.

Soaps and syndets, the category of products with the highest growth in 2011, was unable to continue this success to 2012. This segment remained at 366 million Euros of sales.

The assortment of shaving care products, aftershaves and preshaves was under a strong price and interest margin pressure. The market volume decreased by 1.8% to 271 million Euros.

In 2012, this category grew with a slight asset of 0.7% to 449 million Euros. Depilatories were the main drive of this growth; an increase by 4.3% up to 154 million Euros. The second strongest growth within this group was found in baby care products; their growth increased to 142 million Euros, by 3.1%. Foot care products underwent a minus growth by 4.0%. The market volume sunk to 153 million Euros.

*Foot care products, depilatories and baby care products without shampoo, bath and shower preparations, soaps
Heavy duty laundry detergents are the most important sub-segment in this segment, with a volume of 1,176 million Euros. The share within the total market of home care products lies at over 25%. Furthermore, this category contributed significantly to the continuing sales development in home care, with an asset of 5% (equivalent to 56 million Euros). This asset can be traced down to the new impulses in liquid concentrates and successful innovations.

Light duty laundry detergents sales decreased by 0.8% down to 200 million Euros, in 2012. Hereby the sales drop turned out to be less than the previous year with 2.6%; in 2010 the sales were 207 million Euros.

In the reporting year 2012, the total market for home care products grew by 0.9% up to 4,324 million Euros. 1.7 billion packages of individual home care products are sold annually in Germany1). For these products, in Germany, were spent 53 Euros per capita per year, an increase of 1 Euro compared to the prior year.

The laundry additives market was not able to keep the level of 2011, decreasing by 2.6% to 314 million Euros. The declining trend of the previous year continued throughout 2012. Despite increased actions by washing additives and textile care products, the decline within bleaching/stain removers could not be balanced out.
Fabric conditioners reached an asset of 2%, marking a trend reversal compared to the previous year. This equates a growth of 309 million Euros. A significant contributor were the sales gained through promotions.

Once again, the dishwashing detergents market developed positively, with a growth of 2.5%. The growth of 17 million Euros to 696 million Euros can be traced back to private labels for hand dishwashing detergents.

Roughly 20% of the home care products market was realised through the hard surface cleaners. Therefore this product category is the second most important pillar for home care products. There was a slight decrease by 0.2% to 853 million Euros, prohibiting a positive asset as in the previous year (3.9%).

Leather care products were able to maintain the level from the previous year. The market remained unchanged at 66 million Euros.

Furniture, floor and carpet cleaners sales dropped significantly in 2012. The market decreased to 74 million Euros. This equates to a minus of 7.1%.

The air fresheners and household insecticides market grew slightly by 0.6% to 388 million Euros. Interesting return opportunities opened up for air fresheners (through higher priced aerosols and electric suspenders), whereas household insecticides depended on strong weather conditions and failed to develop successfully in 2012.
Market Conditions

The market conditions in the year 2012 were marked by a series of special items. A significant drugstore chain became insolvent, leading to grave changes on the sales quantity front and to a market consolidation, strongly affecting home care products. Consumers chose their preferred shopping location for beauty care products according to the consultation quality and attractive merchandising. Drugstores made up the most important channel of distribution for beauty care products, with 43.8%. Drugstores were very popular among consumers; this reflects in the increase in market share. The consumer markets (starting at a size of 800 square meters), were able to increase their market share from 3.8% to 15.7%, due to improved merchandising and development of their assortment. Department stores, warehouses, and hard-discounters lost market share. 10% of beauty care products were sold in pharmacies.

The automotive care products market suffered under seasonal special items. Bad weather in the summer months lead to a reduction of 9% (the strongest decline in the total market). Sales crashed to 247 million Euros.

Future Prospects 2013

Despite an ongoing recession in most European economies, Germany was able to record a positive growth of 0.7% in 2012. The growth rate of 0.8% (an estimate published by the expert advisory board in November 2012) for the year 2013, will be fuelled by the national demand, instead of export demand (as was the case in 2012). This is where the risks lie concerning the declining international demand. An increasing precaution amongst consumers, lead to a strong purchase hesitation and price sensibility in 2012.

In the year 2013, economy and politics have to face augmenting challenges. The foreign commerce needs to stand strong in a difficult environment, and all hope lies primarily on national demand. The initiated energy reversal and increased raw materials prices make the production in Germany more expensive, while an increase in purchase hesitation should affect the demand negatively. The cyclical dynamics will become weaker in the second half of the year.

With these facts in mind, IKW is expecting a difficult total market environment and an increase in the fight for market share in the mature consumer market. The latter would lead to an intensification of the price competition, with growing shares of action merchants in most product categories. In 2012, private labels lost in some product categories. Consequently, in 2013, it is expected that private labels exercise pressure on the brand name product industry, especially in light of the purchase hesitation.

It will depend on the innovative capacity of IKW’s members, whether it will be possible to continue the growth successes from the previous year (and maintain beauty care’s and home care’s secure positions on the market). IKW is cautiously optimistic and predicts an asset of 0.5% for beauty care and home care products in 2013.

1) SymphonyIRI Group, Duesseldorf
2) GfK Gesellschaft fuer Konsumforschung, Nuremberg (Society for Consumer Research)
Medium-sized Businesses

Medium-sized businesses have a special standing at IKW. Two conferences happen annually for medium-sized businesses exclusively, during which relevant economic topics are intensively assessed. Key aspects of the March 2012 Spring Conference were the chances and risks of internationalization for medium-sized businesses. The Fall Conference focused on the change of advertising of medium-sized businesses, induced largely by the increased use of social media.

Trade Fairs Abroad

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

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

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

IKW is currently active at the trade fairs in Dubai, Abu Dhabi, Hong Kong, Shanghai, and Moscow. Additionally, IKW organizes fair initiatives on a private enterprise basis, for the foreign market in India. Mumbai and New Delhi will be added to the above list of trade fairs, acknowledged by the federal foreign fair program.

The implementation of the content of the new EC Cosmetics Regulation, effective since July 11, 2013, is the focal point of the work done in the beauty care sector.

An important topic of the regulation is the safety assessment of cosmetic products, described in more detail than before in Annex I of the regulation. The EU Commission did not publish a guideline for the annotation of Annex I yet. The qualifications of the persons who are entitled to conduct the safety assessment are specified in the regulation. Interdisciplinary knowledge is necessary for competent assessment of safety of cosmetic products. The DGK, German Association for Scientific and Applied Cosmetics, together with IKW, offers advanced training courses for safety assessors in German and English (see www.safetyassessor.info).

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

Cosmetic products have a high level of safety and compatibility. Nevertheless, even under correct use, individual intolerances, such as minor skin irritations or allergic reactions, can occur. According to a survey done by IKW since 1976, there are only 1.3 cases of health-related intolerances per 1 million sold cosmetic product packages. The very rare case of a serious undesirable
effect, e.g. such a one which needs to be treated in a hospital, should be reported, according to the new EC Cosmetic Regulation – this process was named Cosmetovigilance. The European Commission published guidelines and standardized report forms regarding this topic on the internet.

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

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

Further emphasis in this sector lies on the dialogue with other institutions. Further information for producers and distributors of cosmetic products in Germany can be found on the homepage: www.schoenheitspflege.org.

LEGAL REGULATIONS
For detergents and maintenance products, the following legal regulations are especially important:
- Chemicals Regulation (EC) No. 1907/2006 (“REACH”)
- Regulation on Classification, Labelling and Packaging (EC) No. 1272/2008
- Biocidal Products Regulation (EU) No. 528/2012
- German Food, Feed and Commodities Act

Because of recent changes to the Detergents Regulation, the phosphor content of laundry and automatic dishwashing detergents will be limited, if they are intended for private use. While such laundry detergents are basically phosphate free in Germany since the mid 1980s, phosphate is still a major substance of content in automatic dishwashing detergents. However, in Germany the percentage of phosphate from automatic dishwashing detergents in the sewage water is very low, less than 10%. Furthermore, 90% of phosphate from household sewage water is eliminated, due to the access to 3-levelled purification plants in Germany. Further information regarding legal regulations is available here: www.haushaltspflege.org.

FORUM WASCHEN
On the dialogue platform FORUM WASCHEN (“FORUM WASHING”), founded by IKW in 2001, the following groups work together: consumer associations, environment associations, agencies, ministries, science and producers of domestic appliances and wash and cleaning detergents. The abstract term “Sustainability” is explained using the example of washing and cleaning, and consumer relevant information is developed, for example as “Six Golden Rules” for washing, drying, doing dishes, and cleaning within the household (available in English here: www.forum-waschen.de). In the year 2012, FORUM WASHING became an official project for the World Decade for Education for Sustainable Development of the UN, for the time-span from 2013 to 2014.

The consumer information “Allergies and Irritations – do Washing and Cleaning Detergents play a Role?” was compiled with significant contribution from the German Association for Allergies and Asthma (DAAB), stating that allergic reactions to washing and cleaning detergents are very rare. Furthermore, washing and cleaning help significantly to reduce allergens at home.

PRODUCT SAFETY
The home care sector 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 2011 9.5 billion packages were sold and the following case data was registered:
- Skin Irritations
  - Described plausibly by the consumer: 2,419
  - Medically confirmed: 73
- Allergies
  - Inquiries by Doctors: 37
  - Medically confirmed cases: 22

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

ORDINARY MEMBERS

A

ABTSWINDER
NATURHEILMITTEL GMBH & CO. KG
www.abtswinder.de

ACCENTRA
KOSMETIK ACCESSOIRES GMBH
www.accentra.de

ADA COSMETICS INTERNATIONAL GMBH
www.adacosmetics.com

AHAVA COSMETICS GMBH
www.ahava.de

AKZENT DIRECT GMBH – NAILS, BEAUTY & MORE
www.akzent-direct-gmbh.com

ALBAAD DEUTSCHLAND GMBH
www.albaad.com

ALESSANDRO INTERNATIONAL GMBH
www.alessandro-international.de

ALEX COSMETIC GMBH
www.alex-cosmetic.de

ALMAMILY
REINIGUNGSKONZENTRATE GMBH
www.almamily.de

ALMIRALL HERMAL GMBH
www.ermal.de

ALSITAN GMBH
www.alssitran.de

ALVA NATURKOSMETIK GMBH
www.alva.de

AMWAY GMBH
www.amway.de

ANIKA CHEM. PHYSIKAL. ANALYSEN UND KOSMETIK GMBH
www.anika-cosmetics.de

JEAN D’ARC EL COSMETIQUE GMBH & CO. KG
www.jda.de

ARTDECO COSMETIC GMBH
www.artdeco.de

ASAM GMBH & CO. BETRIEBS KG – IRIS-COSMETIC
www.asam-cosmetic.de

ASHYNP GMBH
www.asynp.de

AUWA-CHEMIE GMBH
www.auwa.de

AZETT GMBH & CO. KG
www.azett.de

BCG BADEN-BADEN COSMETICS GROUP AG
www.bcg-cosmetics.de

BCM COSMETIK GMBH
wwwbcm-kosmetik.de

BEAUTY & CARE AG
www.beauty-care-ag.com

BEAUTYCOM GMBH
www.beautycom.biz

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SERVICEGESELLSCHAFT MBH
www.beautyfsa.de

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www.becher.de

WALTER BECKER GMBH & CO. KG
www.becker-chemie.de

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www.begapinol.de

BEIERSDORF AG
www.beiersdorf.de

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www.beromin.de

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www.emil-bihler.de

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www.bioenergo.de

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www.bogan-online.com

BIO-DIAT-BERLIN GMBH
www.biodiat-berlin.de

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www.biomarins.de

BIRKEN AG
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www.bo-cosmetic.de

BODE CHEMIE GMBH
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BODY COSMETICS INTERNATIONAL GMBH
www.body-international.de

BORIND GESELLSCHAFT FUR KOSMETISCHE ERZEUGNISSE MBH
www.boerind.com

BOMBASTUS-WERKE AG
www.bombastus.de

APOTHEKER WALTER BOUHON GMBH
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HILDEGARD BRAUMLANN KOSMETIK GMBH & CO. KG
www.hildegard-braumullmann.de

BRAUNS-HEITMANN GMBH & CO KG
www.brauns-hietmann.de

BUCK-CHEMIE GMBH
www.buck-chemie.de

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www.buechen.de

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www.carefullcolours.de

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www.caudalie.de

CC-DR. SCHUTZ GMBH
www.cc-schutz.com

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COSMETIC & HEALTH PRODUCTS GMBH
www.chiara-ambra.de

CMC COSMETIC PRODUKTIONS-GMBH
www.cmc-cos.de

COLÉP ZÜLICH GMBH
www.colep.com

COLGATE-PALMOLIVE GMBH
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www.cosimed.de

COSMETIC SERVICE GMBH
www.cosmetic-service.de

COSMOTRADE GMBH
www.cosmotrade.de

COSNOVA GMBH
www.cosnova.de

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www.coty.com

COTY PRESTIGE – A DIVISION OF COTY GERMANY GMBH
www.lancaster-beauty.com

CREVL COSMETICS GMBH
www.crevl.de

CROLDINO SCHNEIDER E. K.
www.croldino.de

D

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www.dalli-group.com

RUDOLF DANKWARDT GMBH
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DELTAPRONATURA
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www.delta-pronatura.de

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www.dental-kosmetik.de

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www.dermapharm.de

DESMED DR. TRIPPEN GMBH
www.desmed-de/truppen.de

DEUTSCHE CHEFARO PHARMA GMBH
www.deutsche-chefaro.de

LVHM PARFUMS & KOSMETIK GMBH
DIVISION Dior

DOETSCHE GRETHER AG
www.doetzsche-gretcher.ch

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ERLACOS GMBH
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ETOL GESUNDHEITSPFLEGE- UND PHARMAPRODUKTE GMBH
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ETRE BELLE COSMETICS-VERTRIEB GMBH
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EURO VITAL PHARMA GMBH & CO. KG
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LIST OF MEMBERS

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MERCK KGAA
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MIDI PETER ZIELKE
www.savon-du-midi.de

MKS - MARKEN KOSMETIK SERVICE
GMBH & CO. KG
www.mks-cos.de

MLV MARKENZEICHEN- UND LIZENZVERWALTUNGS GMBH
www.mlvcos.de

MUSLIER COSMETIC PRODUCTION
GMBH & CO. KG
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NELE KOSMETIK GMBH
www.nele-kosmetik.com

NEO COS SERVICE GMBH – KOSMETIKPRODUKTION
www.neocos.com

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www.neumond.de

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NOVARTIS CONSUMER HEALTH GMBH
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OTTO OEHME GMBH
www.oehme-lanto.de

OLYMP GMBH & CO. KG
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ORPI CHEMIE GMBH
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OTTO COSMETIC GMBH
www.ofo-cosmetic.de

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PATINA COSMETIC SERVICE
www.pacosa-cosmetic.de

PALMERS GERMANY GMBH & CO. KG
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PARICO COSMETICS GMBH
www.panico-cosmetics.de

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www.pcc.eu

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