

# Annual Report 2021.2022



The German Cosmetic, Toiletry,  
Perfumery and Detergent Association





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

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

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



Dear Madam,  
Dear Sir,

War in Europe. What probably not many people had thought possible, has become a reality – with all its terrible consequences. In these times, our thoughts are with the people of Ukraine and the millions who have had to leave their homeland.

Policymakers in Germany and Europe are called upon to act wisely with a view to strengthening the right to self-determination of Ukraine. At the same time, however, those responsible must also keep an eye on the stability in their own country and secure the supply of raw materials and energy. The horrible news from eastern Europe reached us when, after two years of home office, masks, tests, it slowly became apparent that the pandemic was posing less of a threat and the chances for an economically sustainable recovery were increasing. Effective vaccines and high vaccination rates had an impact and ensured that public life was getting back on track. The pent-up consumer demand in terms of joie de vivre was clearly noticeable. However, when weapons talk and the economic consequences in the form of rapidly rising prices become clearly noticeable for everyone, consumption suffers a setback. The optimistic economic forecasts at the beginning of the year have already been withdrawn by the economic research institutes.

At the end of 2021 we had to report a decline in the domestic business by 3.0%. Only the stronger increase in export demand was able to secure on balance a 1.1% rise in sales revenues. No parties, long stays at home, and outdoors only with a mask: under these circumstances people purchased less makeup, hair dyes or fragrances – but rather products which make life at home more comfortable, such as bath and shower products. A similar situation prevailed for home care products: while detergents and cleaning products experienced decreases, fabric conditioners and room fragrances were in higher demand. And even if our attention is currently quite rightly focused on aid and conflict resolution in the Ukraine war, we will continue our commitment to the sustainable production and use of the products represented by IKW. A corresponding legal framework secures reliable guidance and fair market conditions – for instance, when it comes to the use of environmentally friendly raw materials. With the Chemicals Strategy for Sustainability as a substantial pillar of the "Green Deal", the EU Commission is planning a comprehensive amendment to the chemicals legislation. IKW and the German manufacturers of cosmetics, detergents and cleaning products share the goals formulated therein. However, many questions still need to be clarified. Under future regulations the competitiveness and innovative strengths of European companies must continue to be safeguarded – especially in view of the enormous burden as a result of the geopolitical disruptions.

Together with our German and European partner associations, we are contributing our expert knowledge to this important process.

Sustainability is a top priority for our companies. A survey among IKW member companies in the field of beauty care has shown that more than 60% of the respondents have firmly anchored this topic in their company. The fact that this is not just a declaration of intent but that concrete measures follow from it, is shown, amongst others, by the current example of the EcoBeautyScore Consortium. More than 30 cosmetics manufacturers and associations, including the Beauty Care Department of IKW, are involved in this international consortium. The aim is the development of a uniform scoring system for the calculation of a product-specific environmental footprint. This supports consumers in making sustainable purchasing decisions.

For the home care sector, the 10th sustainability report has already been available since May 2021. It impressively documents the progress made in respect of the ecological, social and economic aspects of sustainability. The Forum Waschen, a platform for dialogue, has already existed since 2004 with the involvement of 39 institutions, including public authorities, consumer organisations, universities and associations. On the EU level, the manufacturers of detergents, care and cleaning products have founded the voluntary initiative "Sustainable Washing and Cleaning". Its successes are noteworthy. Since 2006, the companies have been able to reduce their carbon dioxide emissions per ton of products manufactured by more than half.

This commitment is driven by the conviction of the people who work in the companies. And it reflects the demands of an increasingly sensitised public. Consumers want to have environmentally sound products. They are increasingly in search of a responsible lifestyle. And today it is easy for them to make sustainable purchasing decisions. Industry is fulfilling these wishes through product innovations such as detergent concentrates or solid shower bars and shampoos. Packaging is getting lighter, and the packaging material consists increasingly of renewable raw materials or recycled plastic.

However, it also depends to a large extent on us to live more sustainably. IKW, therefore, provides concrete tips to this end. Take less long showers, wash at lower tempera-

tures or use the right dosage of detergents – these are all small steps which have a big impact on the ecological footprint. The extent of this impact is also documented by a study of the Technical University of Berlin dating back to 2019: washing and drying a T-shirt 44 times adds about as much to the greenhouse potential as the production, distribution and disposal of the T-shirt. Anyone who wants to contribute to climate protection should start with the temperature controller: lowering the washing temperature from 60° to 30° reduces the greenhouse potential of the use phase by about 37%. Environmental tips based on the results of the study are now also available as a three-minute YouTube video.

The products of our industry not only clean or contribute to a radiantly beautiful skin. Their psychological effect is likewise of an indispensable value – for wellbeing, self-confidence and a fulfilling social life. The Beauty Care Department has recently had these effects investigated in a in-depth psychological-representative study. Result: cosmetic products are essential everyday companions. From a psychological point of view, they are more than a mere treatment of the appearance. Haircare, makeup, shaving, "making oneself up" before going out or styling for special moments – for many people all these features are the actual constituents of being human.

Against this backdrop, the desire for new encounters re-awakened after two tough years of pandemic is also linked to a new joy of beauty and a well-kept home. Nobody can say for sure what will happen next. I believe that we are on the right track. Let us hope that there will also be a quick and politically driven way out of the war.

Yours sincerely



**Georg Held**

President

The German Cosmetic, Toiletry,  
Perfumery and Detergent Association



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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 e. g. at home, for clothes, shoes and cars and not only help to preserve their value but also create an atmosphere in which people feel at ease and healthy. And in addition beauty care and home care products fulfill dreams and ensure recognition and self-confidence, as confirmed by market research.

The high acceptance of products amongst consumers results in permanently rising consumption spending and turns the products of the beauty care and home care industry into an important pillar of private consumption in Germany. During the past years sales revenues were significantly rising to more than EUR 18 billion.<sup>1</sup>

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.

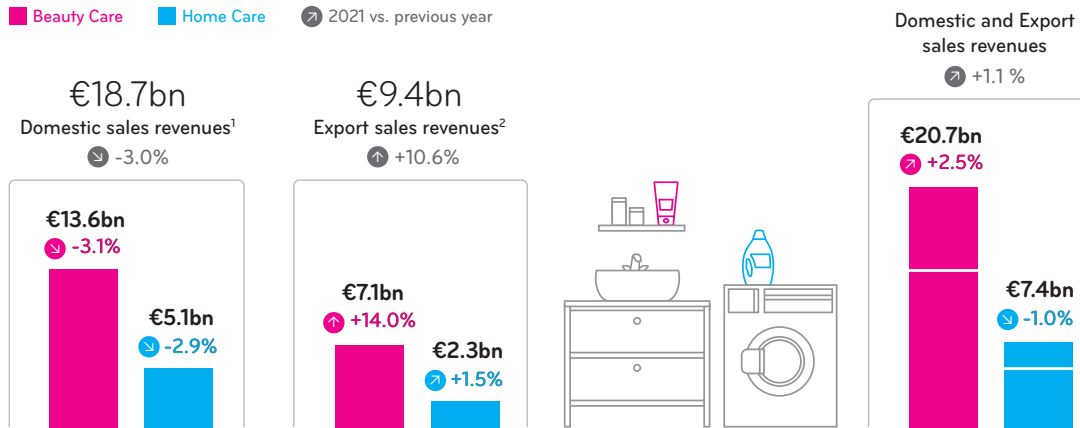
**“The German market for beauty and home care products is the largest in Europe. Despite difficult framework conditions, the markets have developed quite stable due to the high innovative strength.”**

Thomas Keiser, IKW Director General



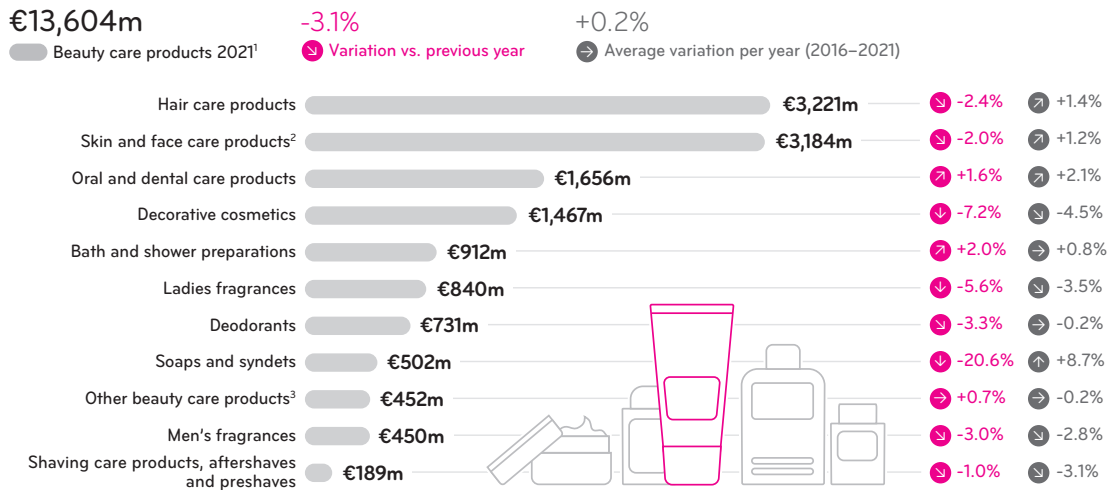
<sup>1</sup>The 2021 market figures are based on a projection of IKW based on data of GfK SE.

### BEAUTY AND HOME CARE IN 2021 WITH REVERSED SIGNS



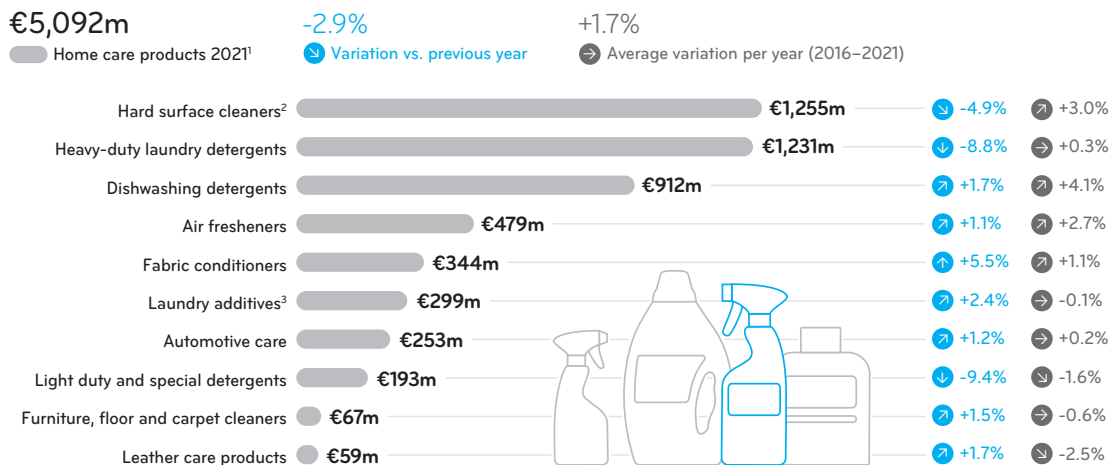
1) IKW projection total market based on GfK (Jan.-Sept. 2021) and own surveys;  
2) IKW projection based on Federal Statistic Office Jan.-Sept. 2021

### BEAUTY CARE MARKET: GROWTH FOR WELLBEING PRODUCTS



Market figures Beauty Care: Status December 9, 2021; 1) IKW projection total market based on GfK (Jan.-Sept. 2021) and own surveys;  
2) Ladies and Gents; 3) Foot care products; Depilatories; Baby care products excl. shampoo / bath & shower / soaps

### HOME CARE MARKET: WELLBEING PRODUCTS IN DEMAND



Market figures Home Care: Status December 9, 2021; 1) IKW projection total market based on GfK (Jan.-Sept. 2021) and own surveys; 2) Bathroom, sanitary, glass, window, household cleaning agents, pipe cleaning agents, soaking agents; 3) Bleaches, starches, ironing aids, textile dye removers



# Beauty Care and Home Care Product Market Germany

**On the domestic market, the pandemic left clear marks in the second year, too. The domestic business fell by 3.0% compared to 2020 to EUR 18.7 billion.**

The long duration of the lockdown in Germany in the winter and spring again changed the consumption patterns. Sales declines in the beauty care sector were recorded on a year-on-year basis for the domestic sales of decorative cosmetics (-7.2%), women's fragrances (-5.6%) and haircare products (-2.4%).

By contrast, people in Germany spent more money on oral and dental care products (+ 1.6%), bath and shower additives (+ 2%) and footcare products (+ 2.7%). All these areas reported record sales revenues. The main sales channels for beauty care products remain the drugstores and the specialist retailers, although the latter suffered significant losses due to the lockdowns.

In the home care sector, fabric conditioners and room scents were among the winners of the year, rising by

5.5% and 1.1%, respectively. Sales revenues from bath additives and shower gels, for instance, of EUR 912 million were higher than in any prior year. Detergents recorded on the other hand, lower sales revenues, because many households used the stocks they had built up in 2020. The domestic market for heavy-duty, colour and all-purpose laundry detergents shrank by 8.8% to EUR 1.2 billion. A particularly large "Covid-19 outlier" concerned the soaps / syndets segment. Here, sales revenues decreased by 20.6% in 2021, after a 77% increase versus prior year in 2020. Apparently, many people in Germany still had stocks of these products from the previous year. The largest distribution channels remained drugstores and discounters. The still relatively small e-commerce sales channel, in particular, was able to develop positively.

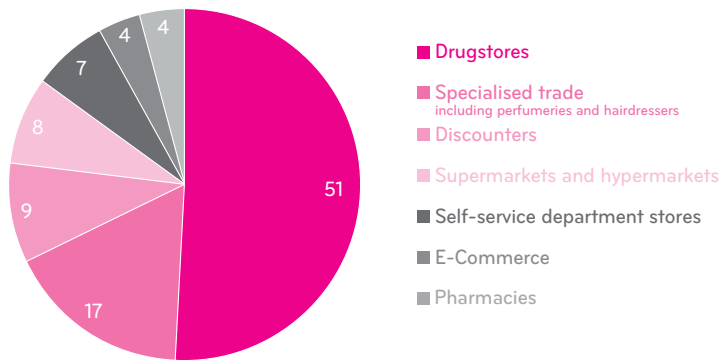


**"It will be crucial to enhance the high product benefits of brands with value systems."**

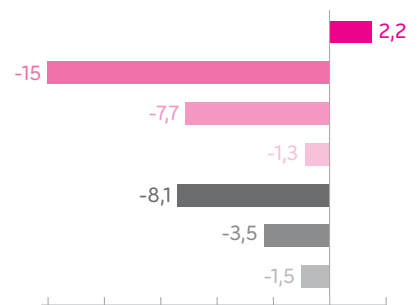
Dr. Robert Kecskes, Insights Director, GfK SE

**BEAUTY AND HOME CARE:**  
SALES SIGNIFICANCE ACCORDING TO TRADE CHANNELS

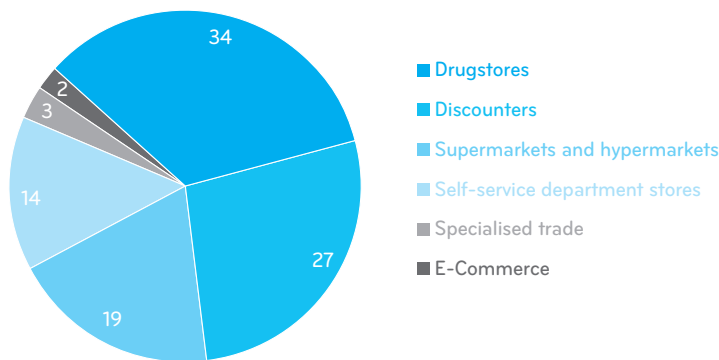
Market share value in %



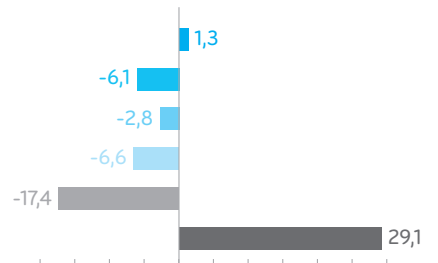
Variation sales revenues versus prior year in %



Market share value in %



Variation sales revenues versus prior year in %





# Outlook

**The effects of the war in Ukraine overshadow the global economic recovery which emerged at the beginning of the year. Forecasts are hardly possible at present.**

However, it is becoming increasingly clear that the Ukraine war has a major impact on the economic development. On the one hand, some sales markets in Russia, Belarus and Ukraine are disappearing. The effects of sharply rising procurement prices and increasing supply bottlenecks for energy and raw materials are, however, even more serious. The most important role is played by the security of gas supplies. If there is a shortfall – be it due to a discontinuation of imports or supplies –, the consequences would be devastating, not only for our sector but for the entire industry. The propensity of private households to consume has also fallen significantly due to the uncertainties, and the further development is strongly dependent on future geopolitical events.

Already before the Ukraine crisis, the market researchers at Euromonitor saw changes as the only constant during the past two years. Consumers are making their decisions in an increasingly conscious and mindful manner. IKW member companies have been aware of this trend for a long time and were relatively confident for the near future. After all, 89% saw the market development in the IKW industry barometer as average or better. Due to the uncertainties of the war-related events, the Covid-19 pandemic which has not yet been overcome and the dramatic price increases for raw materials it is, however, hardly possible to make any forecast at present.



**“The future belongs to the courageous who go forward with purpose and goal.”**

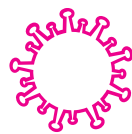
Prof. Franz-Rudolf Esch,  
ESCH. The Brand Consultants GmbH

## 2021 Sentiment: Cautious Optimism in the **Beauty** and **Home Care** industry



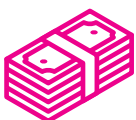
### Market development

**42%** (PY 38%) of the companies interviewed consider the market development to be “good / very good”, 47% (PY 46%) rate it as “average”, 11% (PY 16%) as “bad / very bad”.



### Covid-19

**34%** (PY 36%) see positive effects for the industry  
**62%** (PY 53%) see negative effects for the industry



### Investments

**50%** (PY 47%) of the respondents anticipate higher investments



### Major channels

- E-Commerce
- Drugstores
- Supermarkets
- Discounters



# Interdisciplinary Activities



## Medium-sized Businesses

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

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

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

Christian Lindner (currently Federal Minister of Finance) at an IKW event in his current and former position as Federal Chairman of the Free Democrats and Chairman of the FDP Faction in the German Bundestag



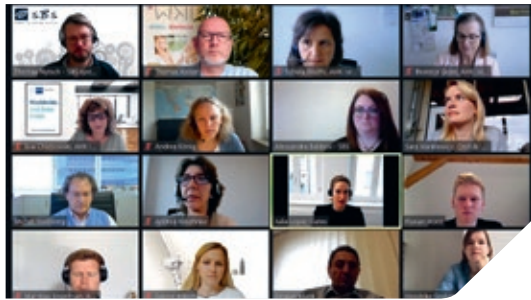
**“IKW is especially for us entrepreneurs the most important association. The strength of IKW is also reflected by the fact that high-profile politicians and tradingpartners give lectures at the conferences and discuss with the medium-sized business. The meanwhile always more than 100 participants show the high interest in IKW.”**

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



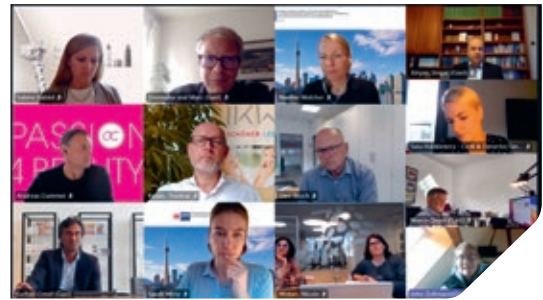


# International Business



Initiation trip Israel digital, April 2021

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-



Initiation trip Canada digital, September 2021

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.germanpavilion.de](http://www.germanpavilion.de).

IKW is currently active at the following trade fairs: Beautyworld Middle East in Dubai, China Beauty Expo in Shanghai, Cosmoprof CBE ASEAN in Bangkok, Cosmoprof India in Mumbai, Cosmoprof Asia in Singapore, Cosmoprof North-America in Las Vegas.

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

## Packaging

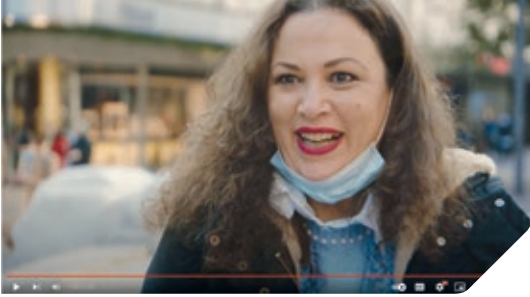
The procedures initiated by the European Commission in 2020 to revise the EU Packaging Directive were continued during the reporting period. The aims are to further optimise packaging design to promote reuse and recycling, an increase in the proportion of recyclates in packaging and a general reduction of packaging waste. A.I.S.E., like Cosmetics Europe, has been proactively involved in the discussion on a revision of the Directive. A corresponding Commission draft is now expected in the second half of 2022.

In some EU member states, national regulations have been adopted for the labelling of packaging material and the separation of the material with a view to recycling. These partly contradictory regulations not only obstruct the free movement of goods on the EU internal market but are often also incomprehensible for consumers. IKW, together with the associations in Brussels, is campaigning in favour of the revision of the Packaging Directive for an EU-wide harmonisation of such labelling regulations for the recycling of packages.





# Press & Press Feedback



What beauty and home care means to people. A street survey in the 2nd Corona year. [www.youtube.com/watch?v=L78AIXZUb](https://www.youtube.com/watch?v=L78AIXZUb)

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 institute GfK SE. 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.

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

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



## 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.



# BEAUTIFUL.LIFE.

## IKW Studies



“Our studies provide interesting insights into social developments and show how important beauty and home care products are in people’s lives.”

Karen Kumposcht, Public Relations /  
Public Affairs Manager, IKW

IKW deals with up-to-date topics, trends and social developments in the fields of beauty and home care.

The studies commissioned by IKW come up with fascinating results and startling insights. All studies can be found under [www.ikw.org/services/ikw-studien](http://www.ikw.org/services/ikw-studien)

### Cosmetics and Us – why we can’t do without them



There are simply products that people do not want to do without. The study “Cosmetics and Us – why we can’t do without them” explains the psychological and physical relevance of cosmetic products in our lives.

### Boomers Undisguised



The generation of baby boomers was reluctant to adapt itself during its youth. Why baby boomers still find it difficult to accept boundaries, what independence means to them and where they get their self-esteem, is examined by the IKW study “Boomers undisguised”.

### Hairstyle and Dignity



How important is the hairstyle and hair care for people? The results of the study “Hairstyle and Dignity” show how much a good haircut and the right hair care contribute to personal wellbeing.

### The Lifecycle of a T-shirt



What is the environmental impact of the production, washing and drying of a T-shirt? The IKW study “The lifecycle of a T-shirt – an eco assessment” offers answers and consumer tips.



## IKW Future Study



Caring for our bodies and living spaces is an essential component of everyday life. The IKW Future Study explores the changing needs and lifestyles, products and trends in beauty and home care.

## The New Power of Cleaning



Today, cleaning in the household has a completely different status and is no longer just an annoying necessity. The IKW study shows the in-depth psychological significance home care products can have for people. A cleaning type test can be found on [www.ikw.org/haushaltspflege/services](http://www.ikw.org/haushaltspflege/services)

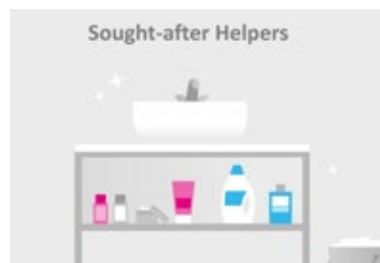
## IKW Youth Studies



What role does a well-groomed appearance play among young people? Three depth psychological-representative studies\* show how important stability is for adolescents and the relevance of self-portrayal on social media platforms.

\* "Youth undisguised", "Selfies undisguised", "Insta undisguised"

## Sought-after Helpers



Beauty and home care are popular everyday helpers. But what is the significance of these daily rituals for us? And what about their relevance during the Covid-19 crisis? IKW has investigated these questions in a representative online survey conducted in April 2020.



↑ Digital round table "TikTok aesthetics and deep fake beauty – about beauty in the new normal" with Europa Bendig, founder and managing director of the agency Sturm & Drang, 05.05.2021

↓ VHU dialogue with Armin Laschet, 05.07.2021



↑ Beautypress Hamburg, 16.09.2021, Birgit Huber

Beautypress Munich, 23.09.2021 Beautypress Team and Birgit Huber, IKW



IKW SME Conference, 28.10.2021, Prof. Dr. Karl-Rudolf Korte, Director of the NRW School of Governance, University of Duisburg-Essen →

Digital round table IKW Home Care → "Challenging statistics – without mathematics" with Prof. Dr. Björn Christensen, University of Applied Sciences Kiel, 22.09.2021, Achern



Trade fair "Beautyworld Middle East", Dubai, 05.–07.10.2021; Kerstin Abed, AHK; Andreas Wegner, Consulate General Dubai; Birgit Huber, IKW



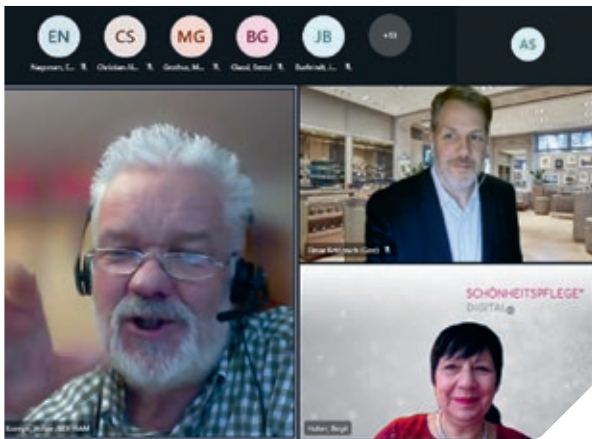
↓ AHK Summit, 04.11.2021



IKW SME Conference, 28.10.2021,  
Prof. Dr. Michael Christ, University of Mainz ↓



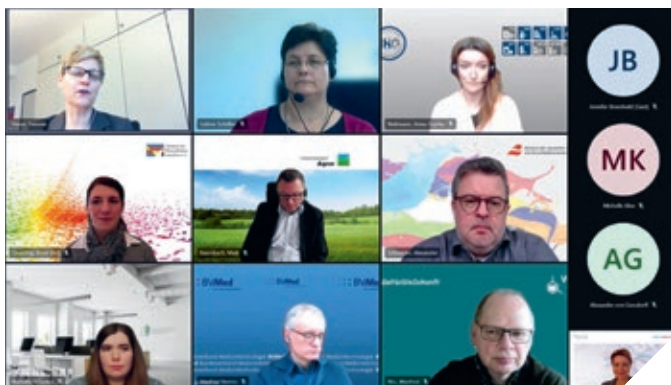
↓ IKW information event for manufacturers of detergents, care and cleaning products on topical issues, 07.11.2021



↑ IKW trade event, 01.12.2021, Volker Krampe, Beiersdorf AG;  
Elmar Keldenich, Federal Association of Perfumeries;  
Birgit Huber, IKW



↓ A.I.S.E. Commsnet Meeting, 19.01.2022



↑ Communication network VCI sector groups,  
18.02.2022

↑ "How can we successfully transform our economy towards climate neutrality?", digital panel discussion of the foundation Klima-Wirtschaft (CEO Alliance for Climate and Economy), 05.04.2022, Sabine Nallinger, member of the board of KlimaWirtschaft; Robert Habeck, Federal Minister for Economic Affairs and Climate Action



# Beauty Care



## Cosmetics Legislation

### The legal background

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

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

### Responsible person

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

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

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

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

Birgit Huber, Head of Department  
Beauty Care within IKW





### Cosmetics GMP

Furthermore cosmetics-GMP is requested for manufacturing cosmetic products.

### Labelling in German language

Besides these requirements the EC Cosmetics Regulation contains a lot of other regulations such as for nano-materials, CMR substances, notification to the Cosmetic

Products notification Portal (CPNP), reporting of the very rare cases of serious undesirable effects, claim substantiation of cosmetic products, positive lists and banned substances and many more. It is of importance to know that the labelling requirements for products sold in Germany have to be in German language. IKW has published an information for producers and distributors of cosmetic products on its website under the following link: [www.ikw.org/ikw-english/beauty-care-topics/detail/general-information-for-manufacturers-and-distributors-of-cosmetic-products-in-germany-overview-of/](http://www.ikw.org/ikw-english/beauty-care-topics/detail/general-information-for-manufacturers-and-distributors-of-cosmetic-products-in-germany-overview-of/)

## Product Safety

Cosmetic products have a high level of safety and compatibility. Nevertheless even under correct use, individual intolerances such as minor skin irritations or allergic re-

actions, 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

IKW is also active in collaboration with other institutions in Germany, like dermatologists, pediatricians, consumer associations, hair dressers, beauticians and many more.

In regular meetings IKW tries to identify common interests and publish a common position. IKW has commonly published a leaflet on internet sales of cosmetic products.



# More than 20 years of Safety Assessor Courses



## A success story

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

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

This work has been performed for almost 25 years for DGK and IKW with their offering of continuing education courses which are regularly attended by many safety as-



Speakers at the safety assessor symposium\*, April 2018

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

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

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



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

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

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

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

# Studies

## Hairstyle and Dignity

The significance of hairstyle and hair care products for people is at the centre of this depth psychological-representative study. Six relevant motivations have been deciphered and the individual hair care products support these motives in different ways.

The findings of the study allow us to conclude that hairstyle and hair care are far more than purely super-

ficial cosmetic features. In physical and psychological terms, the products are relevant from the respondents' point of view for being human. The application of the products contributes decisively to the development of a sense of dignity, and profound human needs are satisfied. If people are deprived of the opportunity to use these hair care products, many feel torn out of their life, unable to cope with their daily routines and not socially acceptable.

In addition to the fundamental importance, individualisation and personality development are needs which are perceived as relevant for life and would be severely undermined if hair care products were no longer available. The daily, weekly and monthly use of a wide range of hair care products is, therefore, perceived as indispensable by the people in Germany.



**"A groomed hairstyle and hair care are not only relevant for personal wellbeing. They are essential and are an integral feature of being human."**

Ines Imdahl, Lönneker & Imdahl  
rheingold salon GmbH & Co. KG





## Cosmetics and Us – why we can't do without them

Based on the results of the study "Hairstyle and Dignity", another in-depth psychological-representative study examines the significance of cosmetic products for people. Six relevant motives for use show how essential the reviewed products such as toothpaste, deodorant, fragrances, facial care, shower gel, bodycare, shaving and beard care as well as decorative cosmetics and nail varnish are for people, more particularly also with a view to their diversity. Because cosmetic products are perceived by people as cultivating, socially relevant, expressing values, individualising, providing structure in everyday life and rejuvenating.

All this contributes to the fact that people cannot imagine their lives without the products they use and feel dramatically deprived of their self-determination, fulfilment and self-esteem.

Overall, it has been possible to show that cosmetics have more than just a superficial influence on the human condition. The respondents found that all products they use are very important. Each product is mentally relevant in its significance – often also in its different forms of supply. What people want is a wide variety of consistencies, fragrances, sizes, pack formats and further specifications and offers for different types of skin, phases of life and times of the year and day. This is essential for almost all respondents.



# Home Care



## Product Safety

The Home Care department of IKW has been conducting surveys since 2007, asking its member companies (selling detergents and maintenance products to private consumers in Germany) about registered intolerances. 25.4 billion packages were sold in the period from 2006 to 2020. 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. An average of only one medically confirmed case of allergy per one billion sold packages could be determined during the time period from 2006 and 2020.

allergies	total number of cases from 2006 to 2020	number of cases per 1 billion sold packages
Inquiries by Doctors	60	2
Medically confirmed	30	1

skin irritations	total number of cases from 2006 to 2020	number of cases per 1 billion sold packages
Described plausibly by the consumer	6,436	253
Medically confirmed	160	6

# Sustainability



Professor Dr. Messner,  
President of the Federal Environment Agency (UBA)



Dr. Marc-Oliver Pahl,  
Secretary General of the Council for Sustainable Development  
of the Federal Government of Germany

## FORUM WASCHEN

The dialogue platform FORUM WASCHEN ("Forum Washing") is a sustainability initiative which was established in 2001 by IKW.

Other stakeholders of FORUM WASCHEN are public authorities and ministries, professional organizations, household appliances and textile industry, environmental and consumer associations, universities, institutes and schools from Germany, see [www.forumwaschen.de](http://www.forumwaschen.de).

The IKW Home Care department acts as the co-ordination office for FORUM WASCHEN.

Each year, FORUM WASCHEN organises the annual Aktionstag Nachhaltiges (Ab-) Waschen ("Action day on sustainable washing(up)") on 10 May since 2004 with events throughout Germany. The goal of the action day is to motivate consumers and pupils through opinion leaders to support more sustainability in washing and cleaning at home.

The chairman of this action day in 2021, was Professor Dr. Dirk Messner, the President of the Federal Environment Agency (Umweltbundesamt, UBA).

The chairman in 2022 is Dr. Marc-Oliver Pahl, Secretary General of the Council for Sustainable Development of

## waschtipps.de

the Federal Government of Germany.

The platform [www.waschtipps.de](http://www.waschtipps.de) initiated in 2016 for teenagers and young adults.

As part of a project at Fulda University students take care of the public Instagram profile "waschtipps", which can be accessed via [www.instagram.com/waschtipps](https://www.instagram.com/waschtipps) or via the QR code:



## The lifecycle of a T-shirt – an eco assessment

On behalf of IKW the Technical University of Berlin carried out the study "The Lifecycle of a T-shirt – an eco assessment" in 2019, which summarises the most important environmental impacts of the lifecycle of a textile item. For the purposes of the study, assumptions were made that were as realistic as possible. A commercial grade white cotton T-shirt was considered which is produced outside Europe, bought in Germany, worn and washed 44 times, dried and finally disposed of. Its production, distribution, care during the use phase and disposal require certain quantities of resources, eg water, which exceed the weight



of the T-shirt many times over. In addition, greenhouse gases equivalent to 3.7 kilogrammes of carbon dioxide (CO<sub>2</sub>) are released during its "lifecycle".

The study clearly shows that the cotton production and T-shirt manufacturing are major determinants of most of the possible effects on the environment, such as land use, freshwater use, consumption of raw materials such as ores, metals and minerals, as well as negative impacts on water bodies and their organisms. The T-shirt production and the use phase, ie washing and drying of the T-shirt, have a relevant impact on the greenhouse potential and

the potential water depletion. In order to significantly reduce the environmental impact of washing and drying in the household, the following is necessary: washing at low temperatures, precise dosage of the detergent and full loading of the washing machine, laundry drying outdoors.

A summary of the most important key messages of the study can be downloaded via:

[www.ikw.org/fileadmin/ikw/downloads/Haushaltspflege/2019\\_12\\_04\\_IKW-PressRelease\\_T-Shirt-LCA.pdf](http://www.ikw.org/fileadmin/ikw/downloads/Haushaltspflege/2019_12_04_IKW-PressRelease_T-Shirt-LCA.pdf)

## Sustainability Report 2021

In May 2021 the report on Sustainability in the detergent, care and cleaning industry in Germany was published: [www.ikw.org/fileadmin/IKW\\_Dateien/downloads/Haushaltspflege/2021\\_IKW\\_Nachhaltigkeitsbericht.pdf](http://www.ikw.org/fileadmin/IKW_Dateien/downloads/Haushaltspflege/2021_IKW_Nachhaltigkeitsbericht.pdf). It informs about social, ecological and economic indicators of the sector and is already the 10th report since the beginning of sustainability reporting of IKW for detergents, care and cleaning products in Germany in 2005.

# Accident Prevention



In cooperation with the FORUM WASCHEN, a picture card with six golden rules for the safe use of detergents, care and cleaning products was created. The picture card gives simple and important tips in graphic form on how to prevent accidents with detergents, care and cleaning products. It also provides information on what to do if an accident occurs. On the back of the picture card the official internet address with the contact details of the seven poison information centres in Germany are shown. The picture card is distributed through the Aktionstag Nachhaltiges (Ab-) Waschen and can be obtained in printed form directly from IKW as well as from the following website: [www.forum-waschen.de](http://www.forum-waschen.de)

# Technical Topics



## IKW Recommendations for the Quality Assessment of Detergents and Maintenance Products

Already since 1998 the IKW recommendations on quality assessment are used by test institutes and manufacturers of detergents and maintenance products as well as their raw materials to test this product performance in line with practice and in a differentiable manner in order to obtain reproducible results. The following recommendations are available on [www.haushaltspflege.org](http://www.haushaltspflege.org) in German and English language:

- All-purpose cleaners (2014)
- Oven cleaners (2005)
- Bath cleaners (2002)
- Glass ceramics cooking field cleaners (2004)
- Glass cleaners (2022)
- Manual dishwashing agents (2002)
- Power fat cleaners (2017)
- Car Paint Care Products (Part 1: Paint Cleaners, 2018)
- Car Paint Care Products (Part 2: Paint Conditioners, 2022)
- Leather care products (2002)
- Machine dishwashing agents Part A (1998)
- Machine dishwashing agents Part B (2015)
- Cleaning agent resistance of footwear uppers (2022)
- Acid WC cleaning agents (1999)
- Instant polish emulsions (2000)
- Winter windscreen cleaners for car windscreen washer systems (2005)

At present the working groups for Car Paint Care Products, Manual Dishwashing Detergents and Laundry Detergents are active to newly elaborate these recommendations or update them.



# Legal Regulations



## Submission of data of mixtures classified as hazardous

Since 1 January 2021 there has been a notification obligation in accordance with Article 45 and Annex VIII of Regulation (EC) No 1272/2008 (CLP Regulation) for formulations of mixtures for private and professional use (eg detergents, care and cleaning products) which are classified as hazardous according to the same Regulation due to their health or physical effects. The notification must be made before the first placing on the market. For mixtures which have already been placed on the market before 1 January 2021, and for which formulation notifications have been sent to the competent authorities according to the legal provisions in force until then, a transitional period until 31 December 2024 applies. For detergents and cleaning products which are subject to notification under this legislation, there is no additional notification obligation according to § 10 of the German Detergents and Cleaning Products Act (WRMG). However, the obligation to transmit data for medical purposes in accordance with § 10 WRMG to the Federal Institute for Risk Assessment (BfR) still exists for non-classified detergents and cleaning products and for detergents and cleaning products placed on the market as substances

**“In Germany, the seven poisons centres advise on about 500 cases of suspected poisoning per day. These include about 50 cases concerning detergents and cleaning products – mostly involving small children. In the vast majority of cases, the poisons centres are able to dispel the suspicion on the basis of solid data – thanks to binding formulation notifications. As a result, many unnecessary, expensive and partly risky medical treatments are avoided every day.”**

Dr. Herbert Desel, German Federal  
Institute for Risk Assessment (BfR)



(eg citric acid, soda). BfR also accepts notifications according to Annex VIII of the CLP Regulation for detergents and cleaning products which are only subject to notification according to WRMG.



# 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.

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.

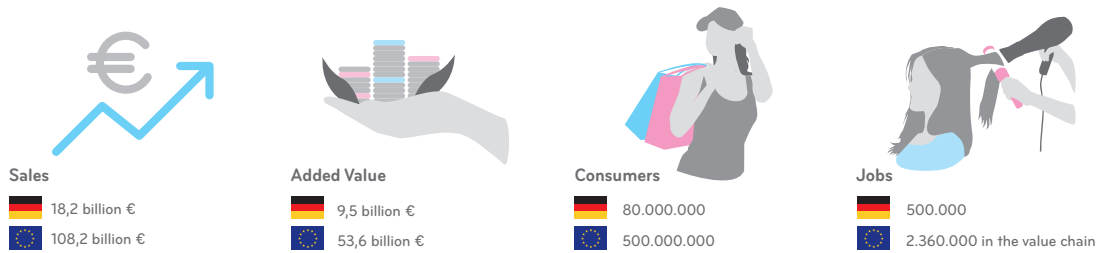
With a market volume of more than EUR 100 billion the European Union is the world's largest market for beauty and home care products and hence has sales revenues which are approximately on the same level as the USA and China together. According to the most recent socio-

### INTERNATIONAL GROWTH OPPORTUNITIES

Export support of IKW for its member companies



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



Sources: Market figures Germany: IRI Information Resources GmbH / IKW, 2017, Market figures Europe: Euromonitor, 2017, Figures on added value, jobs and consumers: Cosmetics Europe and A.I.S.E., 2016

economic studies, the beauty and home care industry in the European Union 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 the European Union, 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.

## Contacts to the European Parliament

Following an initiative by IKW, contacts to the European Parliament were intensified in 2021/2022. An online meeting was held, for instance, with Vice-President Rainer Wieland, during which promising follow-up activities were concretised. In addition, important socio-economic contributions of beauty and home care as well as the results of the studies initiated by IKW during the past two years were presented. Moreover, the co-operation with the European Movement Germany (EBD), the SME Alliance and the close co-operation with the European



**“Research and innovation shape the future. This is what the beauty and home care products industry has successfully demonstrated.”**

Nicola Beer, Vice-President of the European Parliament



associations, A.I.S.E. and Cosmetics Europe, resulted, amongst other things, in talks to the member of the European Parliament Constanze Krehl as well as the offices of Christine Schneider, Andreas Glück, Marion Walsmann and Dr. Andreas Schwab.

# Our Activities in Europe

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

IKW works intensely with the European associations Cosmetics Europe (beauty care) and A.I.S.E. (home care) and contributes its experience. The goal is in each case to maintain the high level of protection for people and the environment. At the same time, the member companies need reliable and clear regulations to implement them in practice. It is likewise important that the European institutions meet their self-imposed deadlines. With the Green Deal project, the European Commission has set itself the goal of making the EU economy a sustainable, climate-neutral circular economy by 2050. Part of this project includes revisions of the basic regulations governing the EU chemicals legislation, "REACH" (Registration, Evaluation, Restriction and Authorisation of Substances) and "CLP" (Classification, Labelling and Packaging of Substances and Mixtures and Notification of Formulations). Already today these basic regulations and, in addition, the strict sectoral regulations for cosmetic products and detergents ensure that both detergents and cosmetic products can be used safely within the EU. IKW and the German cosmetics, detergents and cleaning product manufacturers share the goals formulated in the Green Deal with a view to the development of safe and sustainable chemicals to ensure the best possible protection of humans and the environment. Because health protection and environmental safety are a top priority for the German cosmetics producers and for the manufacturers of detergents and cleaning products. For IKW it is indispensable in this connection that the entire lifecycle of a product and the social, ecological and economic dimensions of sustainability are taken into account. Upcoming regulations must continue to guarantee the competitiveness of the companies within the EU so that households have a reliable supply of the products they need for body and home care. In addition, competitiveness is a prerequisite to the development of marketable innovations which contribute, for instance, to energy and re-

source savings. In October 2021, Cosmetics Europe, A.I.S.E. and another 22 associations sent "A European Agenda for Evidence-Based and Better Policy Making" as an appeal to the European Commission. The associations demand, amongst other things,

- to lay down key regulatory provisions such as definitions and scope at a primary legislative stage, rather than through guidance documents
- to carry out impact assessments for new legislative procedures
- to consult experts from all relevant groups throughout the entire process.

There were several opportunities to participate in consultations in 2021 and at the beginning of 2022, for instance in connection with the Detergents Regulation as well as the Regulation on the Classification, Labelling and Packaging including for cosmetic products. It was asked, amongst other things, whether information which currently still must be provided in a compulsory manner on packaging, could in future be provided on the internet, ie on a so-called "digital label".



IKW welcomes the initiative of the European Commission to simplify and digitalise the labelling regulations. For the labels of detergents and cleaning products only those labelling features should be prescribed in a binding manner which are necessary for the safe and sustainable use of the products, eg hazard and safety pictograms and information on the proper dosage. Any more extensive information should be provided on the "digital label", which must, for instance, be available simply through a Quick Response code (QR code) on the physical label.





# List of Members



## Members

### #

**2K MARKETING & PRODUCTION GMBH**  
www.2kgmbh.com

**2M INTERNATIONAL GMBH**  
www.2m-international.com

### A

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

**ACCENTRA GMBH & CO. KG**  
www.accentra.de

**ADA COSMETICS INTERNATIONAL GMBH**  
www.ada-cosmetics.com

**AEROX AG**  
www.aeroxag.com

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

**ALBAAD DEUTSCHLAND GMBH**  
www.albaad.com

**ALEX COSMETIC GMBH**  
www.alex-cosmetic.com

**ALMAWIN REINIGUNGSKONZENTRATE GMBH**  
www.almawin.de

**ALMIRALL HERMAL GMBH**  
www.almirall.de

**AMS ADVANCED MEDICAL SERVICES GMBH**  
www.ams-europe.com

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www.amway.de

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www.grouparcaya.de

**ELIZABETH ARDEN GMBH**  
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www.lavolta.de

**ARTDECO COSMETIC GMBH**  
www.artdeco.com

**ASAM BETRIEBS-GMBH**  
www.asam-cosmetics.com

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www.ascopharm.de

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www.bastian-werk.de

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**BB MED. PRODUCT GMBH**  
www.bb-kalkar.de

**BCG BADEN-BADEN COSMETICS GROUP GMBH**  
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www.b-cos-services.de

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www.bionorica.de

**BIRKENBACH-GESUNDHEIT GMBH**  
www.birkenbach-cosmetic.com

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**CHANEL GMBH**  
www.chanel.de

**CHIARA AMBRA GMBH**  
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**C.L. ENTERPRISE GMBH**  
www.sunshinecosmetic.de

**CLARACOS GMBH**  
www.claracos.com

**CLARO PRODUCTS GMBH**  
www.claro.at

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

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www.colep.com

**COMFREY GMBH**  
www.ihrlrich.de

**COMPES COSMETIC GMBH**  
**DIE KOSMETIKMACHER**  
www.kosmetikmacher.de

**HANS CONZEN KOSMETIK GMBH**  
www.glynt.com

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www.cosimed.de

**COSME-CARE GMBH**  
www.cosme-care.de

**COSMETIC SERVICE GMBH**  
www.cosmetic-service.com

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**COSNOVA GMBH**  
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**COSPHARCON ENTWICKLUNGS-GESELLSCHAFT FÜR KOSM. U. PHARMAZ. FORMULIERUNGEN MBH**

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www.coty.com

**COUNTERPOINT GMBH**

**CP GABA GMBH**  
www.colgate.de

**CREVIL COSMETICS & PHARMACEUTICALS GERMANY GMBH**  
www.crevil.de

**CROLDINO SCHNEIDER E. K.**  
www.croldino.de

**CURA-BEAUTY GMBH**  
www.curacosmetic.com

## D

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www.dndgermany.de

DALLI-WERKE GMBH & CO. KG  
www.dalli-group.com

DALTON COSMETICS GERMANY GMBH  
www.dalton-cosmetics.com

RUDOLF DANKWARDT GMBH  
www.ruda.de

DELTA PRONATURA DR. KRAUSS &  
DR. BECKMANN KG  
www.delta-pronatura.de

DENTAL-KOSMETIK GMBH & CO. KG  
www.dental-kosmetik.de

DERMA-FUTUR GMBH  
www.derma-futur.de

DERMAPHARM AG  
www.dermapharm.de

DERMCOS GMBH  
www.dermcos.de

DHC DIRK HÖFER CHEMIE GMBH  
www.dhc-kl.de

LYMH PARFUMS & KOSMETIK  
DEUTSCHLAND GMBH DIVISION DIOR

DMV DIEDRICHS MARKENVERTRIEB  
GMBH & CO. KG  
www.dmv-py.de

DOBNER KOSMETIK GMBH  
www.dobner-kosmetik.de

DRECO WERKE WASCH- UND  
KÖRPERPFLEGEMITTEL GMBH  
www.dreco-werke.de

DREITURM GMBH  
www.dreiturm.de

DUESBERG MEDICAL GMBH  
www.duesberg-medical.de

DURABLE HUNKE & JOCHHEIM  
GMBH & CO. KG  
www.durable.de

## E

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www.doctoreckstein.de

ECO COSMETICS GMBH & CO. KG  
www.eco-cosmetics.com

ECOLAB DEUTSCHLAND GMBH  
www.ecolab.eu

ECOVER DEUTSCHLAND GMBH  
www.ecover.com

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www.edding.com

EDEKA ZENTRALE STIFTUNG & CO. KG  
www.edeka.de

FERDINAND EIMERMACHER  
GMBH & CO. KG  
www.eimermacher.de

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www.elkaderm.de

EMEA HANDELSGESELLSCHAFT MBH  
www.emea-cosmetics.com

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www.emerlla.com

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www.epi-cos.de

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www.erdalrex.de

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www.eskapharma.de

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www.etol.de

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www.etre-belle.de

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GMBH  
www.eulenspiegel.de

EURODOR GESELLSCHAFT FÜR  
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www.eurodor.com

EURO-FRIWA GMBH  
www.eurofriwa.de

EVERDROP GMBH  
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www.fedo-gmbh.de

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www.flormar.com

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www.frey-cosmetic.de

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www.frike-group.com

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www.futurehealthcare.de

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www.igs-aerosols.com

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www.ayer-cosmetics.de

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www.muessler.de
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www.newsha.de
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www.nuwena.de
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- OTTO COSMETIC GMBH  
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www.oxygendevelopment.com
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https://paediprotect.de
- PANTOS PRODUKTIONS- UND VERTRIEBSGESELLSCHAFT MBH & CO. KG  
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- PARICO COSMETICS GMBH  
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www.jofrika.de
- PCC SE  
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- PERSAN S. A.  
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