

YEAR IN REVIEW

2018



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A MESSAGE FROM THE

PRESIDENT & CEO

For the Personal Care Products Council (PCPC), 2018 was a year of significant achievement. It was a year that saw vigorous debate in the public policy arena as our industry worked with leading policymakers and advocacy groups to modernize state and federal laws while working to ensure a fair and realistic business environment for cosmetics and personal care companies.

PCPC member companies manufacture, distribute and supply the vast majority of products marketed in the U.S. Product safety, grounded in the best science available, remained a top priority for our industry in 2018.

To drive global access for our members' products, PCPC worked to align domestic and international regulatory practices and eliminate trade barriers for cosmetics and personal care products sold worldwide.

Understanding that consumers, policymakers, regulators, the news media and others want easily accessible information, we revamped our association website, continued updating our science and safety resource — Cosmeticsinfo.org — and leveraged traditional and social media to effectively communicate our industry's commitment to safety, quality and innovation.

These efforts are a prelude to what will be a very exciting 2019 as we prepare to celebrate PCPC's 125th anniversary. Our industry contributes to the nations' health and well-being and plays a critical role in the U.S. economy. We support millions of domestic jobs, invest billions in research and development to drive innovation, and generate taxes to support services and programs in the communities in which our companies operate.

Looking ahead, our industry remains steadfast in its commitment to a healthy future, one that continues to be grounded in the best science available while also addressing sustainability priorities in all aspects of our businesses. Together, with the millions of families who depend on our products, we look forward to a shared future that helps to create a more beautiful world in all its forms.

Thank you to our member companies, sister associations, policymakers, regulators, NGOs, seasoned staff and other important stakeholders who share in our commitment to provide consumers with access to safe products and exciting innovations.

LEZLEE WESTINE
PRESIDENT & CEO
PERSONAL CARE PRODUCTS COUNCIL

ASSOCIATION AT A GLANCE

Since 1894, the Personal Care Products Council (PCPC) has served as the leading national trade association representing the most trusted and beloved brands in beauty and personal care.

Headquartered in Washington, D.C., PCPC advocates on behalf of its 600 member companies to promote an effective and pragmatic regulatory environment that enables companies to manufacture, distribute and supply safe products to families around the world who trust and enjoy them every day. Sound science is the foundation for everything we do.

We engage with a variety of stakeholders—policymakers, regulators, nongovernmental organizations (NGOs), retail partners and the news media—to share the industry’s perspective and educate about the complexity and scientific sophistication behind our products and the importance of harmonizing global regulation of our industry. As we celebrate our 125th anniversary in 2019, we stand united and resolute in our commitment to safety, quality and innovation.



“WHEREVER YOU GO, IT IS EASY TO SEE THE IMPACT PERSONAL CARE PRODUCTS HAVE IN ENRICHING THE LIVES OF CONSUMERS. OUR COMPANIES STRIVE TO EXCEED THE NEEDS OF GLOBAL CONSUMERS AND HELP THEM FEEL CONFIDENT IN THE SAFETY OF THE PRODUCTS THEY USE.”

—
GEORGE CALVERT
CHAIR OF THE BOARD, PERSONAL CARE PRODUCTS COUNCIL
AMWAY CHIEF SUPPLY CHAIN OFFICER

MODERNIZING GOVERNMENT POLICIES

PCPC represents the industry at the federal, state and local levels on issues of interest to the cosmetics and personal care sector.

Major federal priorities we continue to champion include Congressional funding for the U.S. Food & Drug Administration’s (FDA) Office of Cosmetics and Colors and modernizing FDA’s regulatory authority over cosmetics and personal care products.

We advocated for cosmetics regulatory reform legislation, which went before the U.S. Senate Health, Education, Labor and Pensions (HELP) Committee. We continue to collaborate with a diverse group of interested parties and key stakeholders on this important legislation.

State and local governments increasingly make policy decisions that have a global impact, affecting a wide range of industries, including the personal care and cosmetics sectors. Legislation ranges from product and ingredient bans to intellectual property threats. PCPC advocates, through strategic partnerships, for policies based on sound science.

FEDERAL COSMETICS REFORM

Negotiations with the Senate HELP Committee and other key legislators to develop a meaningful approach to cosmetics reform continued. As part of our ongoing commitment toward modernization, PCPC and its member companies supported a set of principles to guide bipartisan legislative action. We look forward to continuing to work with legislators and other stakeholders to create a more modernized regulatory system.

CALIFORNIA ANIMAL TESTING LAW

PCPC worked with a broad coalition to build an integrated, multifaceted strategy to reach a compromise on SB 1249, the California Cruelty-Free Cosmetics Act, which, beginning January 1, 2020, bans unnecessary animal testing while continuing to protect human health and California jobs.

GREEN CHEMISTRY

In keeping with our commitment to safety, PCPC successfully protected consumer choice by ensuring no personal care products were listed in 2018 as a “priority product” under California’s Safer Consumer Products Law.

PROTECTED JOBS

PCPC prevented more than 300 pieces of legislation in more than 30 states that would have negatively impacted the industry—including more than 50 in New York alone—and jeopardized thousands of industry jobs nationwide.

OVER-THE-COUNTER (OTC) MONOGRAPH REFORM

We supported over-the-counter (OTC) drug monograph reform legislation that would streamline the OTC approval process while allowing companies to continue to innovate.

VOC RULES: FRAGRANCE EXEMPTION

PCPC successfully advocated for the Ozone Transport Commission to amend its Model VOC Rule to include an exemption for personal fragrance products. This change helped ensure our members’ products remain compliant with VOC restrictions and align VOC regulations in a dozen northeastern states in the U.S.

CALIFORNIA PROFESSIONAL PRODUCTS LABELING BILL

PCPC supported California Assembly Bill 2775, which ensures ingredient information for professional use cosmetics is readily available to every salon employee and customer after July 1, 2020. This bill is consistent with our industry’s long-standing commitment to transparency and safety, demonstrated by our voluntary program to proactively provide this information.

SUNUCATE PROGRAM

PCPC partners with the American Academy of Dermatology (AAD) and the American Society for Dermatologic Surgery Association (ASDSA) on the SUNucate program, in collaboration with the National Council on Skin Cancer Prevention. This public health initiative spreads awareness about the importance of sun-protective behaviors and removes barriers that prohibit access to important sun-protective measures, such as sunscreen and sun-protective clothing.

The initiative’s centerpiece is the SUNucate model legislation, aimed at guaranteeing children have unbarred access to sun protection while at school or camp. Also titled as the Reducing Cancer and Excessive UV Exposure in Children Act, the model legislation allows students and participants in youth camps to possess and use a topical sunscreen product while on school or camp property or at an event or activity sponsored by the school or camp without a physician’s note or prescription.

This initiative is in response to reports of schools prohibiting students from possessing sunscreen due to its classification as an over-the-counter medication. To date, 17 states have passed SUNucate-related measures, with several other states pending action; 49 medical associations, patient organizations and industry partners have also signed on in support of these efforts.



EXECUTIVE FLY-IN



LEZLEE WESTINE, LINDA MARSHALL AND MARK POLLACK, ANNUAL MEETING



SENATOR RICARDO LARA, MANDY LEE AND MIKE THOMPSON, CALIFORNIA LOBBY DAY



ALEX KOWCZ, CHIEF SCIENTIST, ADDRESSES SACRAMENTO POLICY MAKERS



LEZLEE WESTINE AND SENIOR TEAM, WASHINGTON REPORT, ANNUAL MEETING



THIA BREEN, GEORGE CALVERT, ALEX KEITH AND LISA POWERS, BEAUTY EDITORS BRIEFING, ANNUAL MEETING



GEORGE CALVERT, BOARD CHAIR



FRANCINE LAMORIELLO, CAFFCI CHAIRMAN SHAOJUN CHEN AND ANNIE WAN, ANNUAL MEETING

ABOUT THE PERSONAL CARE PRODUCTS INDUSTRY

PCPC is the leading national trade association representing cosmetics and personal care products companies and serving as the voice on scientific, legal, regulatory, legislative and international issues for the global industry.

PCPC's 600 member companies represent more than 90 percent of the U.S. industry and are some of the most beloved and trusted brands in beauty and personal care today. As global leaders committed to product safety, quality and innovation, cosmetics companies manufacture, distribute and supply the vast majority of products marketed in the U.S.

Four strategic priorities guide the association's work on behalf of its members:

- Modernizing government policies
- Promoting sound science
- Driving global access
- Maintaining consumer confidence

PROMOTING SOUND SCIENCE

PCPC provides critical support to the industry through a number of efforts and resources that support cosmetics and personal care products safety and build consumer confidence in our companies' products.

Cosmeticsinfo.org
@CosmeticInfo
Follow

There's no need to be confused by or afraid of #preservatives, such as #parabens. In fact, if you've washed your hands, put on mascara, or applied lotion today, you've likely used a product that contains these important ingredients. Learn more: bit.ly/2OwI2CC

Parabens are identical to an acid that occurs naturally in many fruits and vegetables.

Did you know?

GLOBAL ENVIRONMENTAL SAFETY

PCPC launched a multipronged global environmental initiative examining the environmental risk assessment of cosmetics ingredients. Beginning with the development of a computational model for risk screening, the Global Environmental Safety Science Project Team also funded research examining the potential effects of UV filters on the environment and prepared a review paper concluding microplastics do not pose an unacceptable environmental risk.

NEW GUIDELINES

PCPC Science Committees completed two new Guidelines: Investigating Microbial Data Deviations and Process Verification, which support the industry's goal for excellence in manufacturing.

FDA QUALITY METRICS REPORTING

PCPC, the Consumer Health Products Association (CHPA) and FDA conducted a joint webinar about FDA's Quality Metrics initiative, providing an important update on the status of FDA's metrics reporting program, which impacts OTC products manufacturers. The recent FDA initiative provides an opportunity to educate FDA about challenges and opportunities companies face implementing quality metrics reporting.

GMP WORKSHOP

PCPC conducted a Good Manufacturing Practices (GMP) workshop in Los Angeles, co-facilitated by industry leaders, FDA's Director of the Office of Pharmaceutical Quality Operations and several compliance officers. The workshop provided educational outreach and promoted PCPC's partnership on science and regulatory issues.

VOLUNTARY FRAGRANCE ALLERGEN DISCLOSURE

PCPC developed and submitted to FDA a commitment to voluntarily disclose allergens, which is aligned with the industry's global principles and provides consumers with accurate, credible and reliable information.

NEW METHODS IN SAFETY ASSESSMENT

PCPC science staff, FDA officials and other cosmetics regulators met to advance acceptance of non-animal methods to assess cosmetics safety. Working within the International Cooperation on Cosmetics Regulations (ICCR) framework, the meeting resulted in the 2018 publication of principles underpinning the use of new methodologies in risk assessment. These principles have been the subject of several workshops advancing their adoption by international regulatory authorities.

COSMETIC INGREDIENT REVIEW EXPERT PANEL

The Cosmetic Ingredient Review (CIR) Expert Panel is an independent, nonprofit scientific body that was established in 1976 to assess the safety of cosmetics ingredients used in the U.S. PCPC initiated the CIR program at the suggestion and with the support of the Food and Drug Administration (FDA) and Consumer Federation of America (CFA). The Expert Panel is comprised of world-renowned scientists and physicians who have been publicly nominated by consumer, scientific and medical groups; government agencies; and industry.

Representatives from FDA, CFA and PCPC serve as non-voting liaisons to the Panel and are actively involved in the comment and discussion process. Panel members must meet the same conflict of interest requirements regarding financial interests as special non-government advisory experts to FDA.

For more than 40 years, CIR has examined and evaluated worldwide published and unpublished scientific safety data for a majority of ingredients used in cosmetics and personal care products. Meeting four times a year in Washington, D.C., the Panel conducts those evaluations in an open and expert manner.

In 2018, the CIR Expert Panel issued 17 final reports on 278 ingredients, concluding 68 were safe as used, 180 ingredients were safe with qualifications and 30 ingredients had insufficient data to determine safety. Since its inception in 1976, CIR has reviewed 5,556 ingredients for safety.



INTERNATIONAL
ASSOCIATION
COLLABORATION.
ANNUAL MEETING



DRIVING GLOBAL ACCESS

PCPC's Global Strategies program focuses on harmonizing international cosmetics regulations and eliminating trade barriers that hinder our industry's access to consumers abroad. Working with international sister associations and regulators globally, PCPC promotes best practices in cosmetics regulations and assists member companies entering foreign markets. The Global Strategies team manages a number of programs to engage international regulators and assist our members in complying with international laws.

US-MEXICO-CANADA AGREEMENT (USMCA)

PCPC's advocacy resulted in a highly successful Cosmetics Annex in the update to NAFTA. Commitments by all three governments go further than what was achieved in the Trans-Pacific Partnership (TPP) and will result in immediate, significant commercial benefit for U.S. exports of OTC-like products to Canada. In particular, Canada committed to eliminate current requirements for quarantine and retesting of OTC products at the border – the most significant barrier to trade for U.S. exporters. This requirement adds approximately \$100,000 per SKU per year to the cost of placing affected products on the Canadian market. Eliminating this barrier would result in an approximate savings of more than \$102 million annually.

CHINA

Following several years of industry advocacy, the Chinese government made significant progress in finalizing its cosmetics regulatory reform framework. The most recent draft of the law confirmed PCPC's objectives for a more modern approach to cosmetics regulation that will simplify notification and registration requirements, facilitate the use of new ingredients, and address discriminatory requirements for imported non-special use products. It is expected the framework law will be finalized and ratified by China's State Council early in 2019. We will continue advocacy to improve several specific areas of the draft law and engage with Chinese regulators on critical implementing regulations that will be necessary to realizing the benefits of the reform.

TARIFFS

PCPC mounted a strong advocacy campaign to oppose the use of tariffs as a means of addressing international trade concerns. In response to the U.S. administration's announcement in May of increased tariffs on steel and aluminum products, PCPC met with U.S. policymakers in the executive branch and Congress; coordinated action with sister associations in Europe, Canada and elsewhere to oppose retaliatory tariffs on U.S. cosmetics and personal care products; and joined a broad business coalition effort aimed at overturning the tariff measures. PCPC also strongly opposed separate U.S. measures that increased tariffs on imports from China. In August, PCPC submitted formal comments to the U.S. Trade Representative highlighting the negative impact of proposed U.S. measures on trade in

cosmetics products and inputs, and testified at a public hearing to highlight the importance of U.S.-China trade to our industry.

We expect that advocating free trade and open markets will continue to be a priority for PCPC in 2019 and beyond.

MAINTAINING CONSUMER CONFIDENCE

PCPC remains a trusted, respected voice and advocate for the personal care products industry. Staff informs, engages and acts as a credible source of information for key stakeholders including consumers, regulators, policy makers, media and non-governmental organizations (NGOs). In 2018, we made important strides educating about the industry's commitment to safe and innovative products and PCPC's contributions to our nation's economic and social well-being.



WEBSITE REDESIGN

More and more, consumers look for reliable information about the products they use. Our newly redesigned website provides easily accessible, accurate and credible information about the industry's innovation and scientific sophistication, featuring a modern design and improved user experience. The new site officially launched in January 2019.

TRADITIONAL MEDIA AND DIGITAL FOOTPRINT

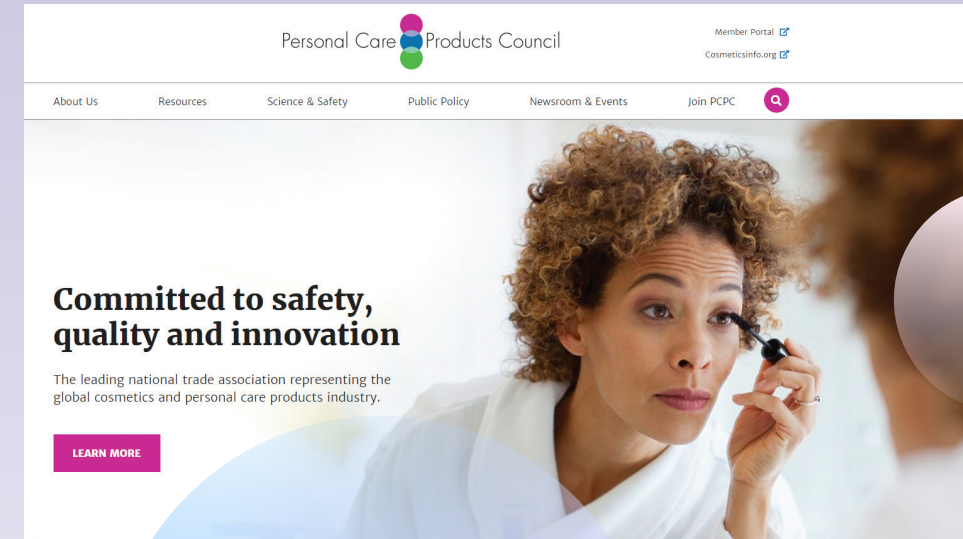
We continued to engage on social media to promote the industry's scientific rigor and commitment to product safety and help educate about our member companies' Corporate Social Responsibility (CSR) and philanthropic efforts.

We responded to complex media inquiries on a variety of topics, engaging with national and international media outlets to inform coverage about our products and our industry. The result reflected industry's perspective and positioned PCPC as a credible source and resource. Most notable is a comprehensive article in *USA Today* addressing product and ingredient safety and giving significant opportunity for PCPC and CIR experts to provide comment.

More than 1.5 million sessions were generated by 1.1 million users on our science and safety resource—Cosmeticsinfo.org. This comprehensive database provides information on cosmetics and personal care products – how they work, data to corroborate safety and science behind commonly used ingredients. Developed and maintained by scientists and subject-matter experts, CosmeticsInfo.org is a trusted resource visited by millions of women, men and families around the world each year.

INTEGRATED CAMPAIGNS

PCPC combined internal resources – including Communications & Public Affairs, State Government Affairs, Legal, Science and Global Strategies – to develop, drive and execute integrated strategies to support legislative efforts. These campaigns included extensive coalition building, message and materials development, and earned and paid media strategies.



PERSONAL CARE PRODUCTS COUNCIL'S NEW WEBSITE



Statement by Alexandra Kowcz, Chief Scientist Personal Care Products Council On the Sunscreen Ban in Hawaii

May 02, 2018

Washington, D.C. – “Sunscreens play a critical role as part of a safe sun regimen in the fight against skin cancer. We appreciate the opportunity to work with legislators in Hawaii and all interested stakeholders who came together to address the issue of sunscreens and the coral reef. Because science serves as the foundation for everything that we do, we remain concerned that policy decisions to restrict the use of sunscreen products with FDA approved sunscreen ingredients, oxybenzone and octinoxate, are based on a limited body of scientific research from which concrete conclusions cannot be drawn.

“Coral reef degradation is an important environmental issue that we all take very seriously. Causes for coral bleaching have been addressed by scientists around the world who state that the primary causes can be attributed to pollution, climate change and overfishing. While we agree that coral health is of great importance, of similar great concern is the prevalence of skin cancer diagnoses and deaths. More than 10,000 people die of melanoma every year, and there are more new cases of skin cancer each year than breast, prostate, lung and colon cancers combined.

“Daily use of sunscreens is a crucial step in the fight against skin cancer and premature skin aging. This is why legislators in Florida, Washington, and twelve other states have expanded access to sunscreens through SUNucate, legislation that would allow students to possess and use a topical sunscreen product while on school or camp property without a physician's note or prescription.

“The dangers of sun exposure are clear and universally recognized by public health professionals and dermatologists around the world. When it comes to consumer health and safety, it is our hope that using sunscreen will be as much of a habit as putting on your seatbelt.”



LOOK GOOD FEEL BETTER FOUNDATION

As part of the industry's philanthropic efforts, PCPC established the Look Good Feel Better Foundation (the Foundation) in 1989, which pioneered the Look Good Feel Better (LGFB) program. This groundbreaking public service initiative improves the quality of life, self-esteem and confidence of people with cancer by helping them manage the appearance-related side effects of cancer treatment. LGFB has served 1 million women in the United States alone since its founding. In addition to providing financial support, the cosmetics industry donates millions of dollars in products used by participants in the program each year.

The program is offered in collaboration with the Professional Beauty Association. In addition to the U.S. LGFB program, the Foundation oversees a global network of 26 licensed affiliates that deliver LGFB programs in countries across the globe. Collectively, the 27-country network has served 2 million people living with cancer on six continents.

THE LOOK GOOD FEEL BETTER ALLIANCE

Introduced in October to provide the framework for the program's new delivery structure and broadened delivery channels, the Alliance is a nationwide network of diverse organizations and individuals united through a common mission to support women in cancer treatment through the delivery of the LGFB program. The Alliance creates an enhanced relationship with hospital delivery partners at the community level.

A modern and efficient software infrastructure is being developed to support many of the program's previously manual processes and moves all volunteer and delivery partner training online for on-demand access, allowing for automation of many program processes. The Alliance structure also includes expanding delivery to improve

accessibility and broaden reach beyond hospitals and cancer centers.

WALGREENS PARTNERSHIP

The Foundation collaborated with Walgreens and the Cancer Support Community to pilot and launch Walgreens' Feel More Like You initiative, which offers support to cancer patients who visit their pharmacies during treatment, based on proprietary content developed by the Foundation.

LGFB LIVE! VIRTUAL WORKSHOP PILOT

The Foundation piloted Look Good Feel Better Live! Virtual Workshops, which provide valuable LGFB information to women who may have difficulty getting to a group workshop, don't have one close by or prefer to have more scheduling flexibility.

BENEFIT'S BOLD IS BEAUTIFUL

In May, the Foundation partnered once again with Benefit Cosmetics and their Bold Is Beautiful campaign. The month-long campaign donates the proceeds of brow waxing services at Benefit boutiques and their retail partner locations (Sephora, Sephora inside JCPenney, ULTA and Macy's) across the country to six charitable partners, including LGFB.

LORD & TAYLOR CHARITY DAY

For the third year, LGFB was selected as the charitable recipient of Lord & Taylor's January all-store Charity Day. This shopping event raised significant funds for LGFB and educated sales associates in all Lord & Taylor stores about the program's charitable work.



LORD & TAYLOR CHARITY DAY



LOOKING FORWARD

CELEBRATING 125 YEARS CREATING
A MORE BEAUTIFUL WORLD

The Personal Care Products Council will honor the past and celebrate our future as we recognize our 125th anniversary in 2019. Our industry was built by entrepreneurs with very different backgrounds, skills, means and countries of origin. They included icons like Elizabeth Arden, a nurse whose red lipstick became a trademark of the women's suffrage movement, and Estée Lauder, who started her own company after learning to make beauty products from her chemist uncle. Annie Turnbo Malone, an orphan, and Madam C.J. Walker, a child of slaves, both built successful beauty companies making products for African-American women and went on to become America's first female, self-made millionaires. Mary Kay Ash started her company to create a more beautiful life for women and provide them the opportunity for personal and financial success. As an industry created by women for women, our member companies continue to empower and promote female leadership, including efforts to ensure a more inclusive workplace.

During the next 125 years and well beyond, our industry will remain steadfast in its commitment to a healthy future, one that is grounded in the best science available and addresses sustainability priorities in all aspects of our businesses. Consumer demand for trust, transparency, authenticity and generosity has never been greater. Over the next year, PCPC will embark on a sustainability initiative that engages key stakeholders and reaffirms our commitment to making our communities better.

Together, with the millions of consumers worldwide who trust and depend on our products every day, we look forward to a shared future grounded in safety, quality and innovation.



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