

**4th
edition**

Press Kit

COSMETIC 360[®] TRADE FAIR

17.18 OCT. 2018

CARROUSEL DU LOUVRE, PARIS

SNEAK PREVIEW

PRESS CONFERENCE, 8 JUNE 2018, STATION F

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COSMETIC VALLEY

A 7-point strategy for French-made products

COORDINATING FRENCH FRAGRANCE AND COSMETICS INDUSTRY ACTIVITIES

Cosmetic Valley was created by industry professionals in 1994 and certified as a competitiveness cluster in 2005. The French state has tasked it with implementing a national strategy for coordinating initiatives within France for the benefit of the industry.

This mandate has broadened the reach of Cosmetic Valley, initially focused on the regions of Centre-Val de Loire, Normandy, and greater Paris (Île-de-France). It has since opened two new branch offices in Normandy and Nouvelle Aquitaine while strengthening partnerships with other regions—like Brittany and Hauts-de-France—and competitiveness clusters, such as Glass Valley (Vallée de la Bresle).

This ambitious strategy aims to **focus the energies of the French fragrance and cosmetics industry** to better meet upcoming challenges on a booming and highly competitive world market. The Cosmetic Valley model has inspired the creation of numerous clusters internationally. Its success is due to the creation of a German-style 'industrial fabric' bringing together big companies, SMEs in manufacturing and other sectors, and start-ups; connecting purchasers and suppliers; and creating an interface between public basic research and private applied research. This synergy boosts industry capabilities and enhances visibility. And this is the direction in which Cosmetic Valley would like to take the industry on a national scale.

PROMOTING PRODUCTS MADE IN FRANCE

As the driver of France's world-renowned fragrance and cosmetics industry, number one worldwide for volume of exports, Cosmetic Valley champions the values of French production: innovation, performance, product safety, respect for the environment, and quality of materials.

It addresses these fundamentals through its programme for **strategic fields of regional specialization**. This approach maps the development of particular areas of industry expertise (e.g., testing and metrology, safety, regulations, or formulation) to specific French regions as determined through close collaboration with regional authorities, training institutes, and local business and in light of their resources, assets, and ambitions.

It allows companies—SMEs especially—use of otherwise inaccessible technical facilities and lets them participate in research projects, targeted training programmes, and specially themed conferences, all to promote their growth and competitiveness.

Cosmetic Valley is also working on **adopting segment-specific policies** for critical components of the fragrance and cosmetics economy, including skin and hair care product, fragrance, and make-up manufacturing.

9 STRATEGIC FIELDS OF REGIONAL SPECIALIZATION

- Safety (Normandy), through the Cosvapex programmes, Cosmetolab and Cosmetics@Normandie facilities, the Tremplin Carnot I2C innovation cluster, and current efforts focused on packaging
- Research (Centre-Val de Loire), through the Cosmetosciences programme
- Connected Beauty (Chartres), through Beauty Tech
- Sensorial Properties (Tours), through the Certesens facility
- Lipochemistry and Agricultural Resource Recovery (Nouvelle-Aquitaine), in partnership with ITERG and the CVA
- Testing and Metrology (Val-d'Oise, Cergy-Pontoise), through the Cosmetics@paris-île-de-France unit
- Olfactory Properties (Île-de-France), in partnership with ISIPCA
- Start-Up Support Services, in partnership with the French government (Investissements d'Avenir investment programme), through Orléans-based Cosmet'Up
- Performance and Quality of Working Conditions (Blois), in partnership with INSA Centre-Val de Loire

SUPPORTING SMEs IN THEIR GROWTH, BRINGING THEIR IDEAS TO FRUITION ON THE MARKET

Numbering over 1,200 companies, SMEs make up 80% of the membership of Cosmetic Valley, which helps them define their innovation, export, training, and development strategy to nurture their growth, skills, and competitiveness.

To fulfil these aims, Cosmetic Valley offers a wide range of tools, including:

- launching of collaborative research projects that provide a gateway to university laboratories
- networking to develop synergies between parties within the industry ecosystem
- assistance with project financing and engineering—especially through Cosmet'Up, a French facility specializing in customized support for innovative projects in fragrance and cosmetics that is sponsored by LVMH Recherche in partnership with Spincontrol, Langé, and Cosmetic Valley
- help entering markets where other cluster members already have a foothold, through attendance at the leading international trade fairs—e.g. Cosmoprof in Hong Kong, China Beauty Expo in Shanghai, in-cosmetics, and Beauty World in Dubai—as ambassadors of French manufacturing ('made in France'), with the sponsorship of Cosmetic Valley

JUMPSTARTING THE INNOVATION ECOSYSTEM

It takes work to become a champion. We are on a **very competitive market** with two main competitors—the US and Japan—and rising stars to contend with like South Korea (K-Beauty). At the same time, the range of cosmetic offerings has diversified, introducing new products and targeting new audiences and needs. If we are to respond to this situation, innovation is an absolute must.

And it's everywhere. Through new molecules, new textures, and new protocols, we apply the best of the latest technical advances to protect and enhance: an expanding range of natural—including plant and marine—and biotechnological materials; nanotechnology, new methods for extracting and purifying ingredients, aromatherapy, microemulsions, powder compression technology; bottling, packaging, propellants; and testing! Everything is changing.

To meet the challenge, **Cosmetic Valley**, like other large clusters that excel by placing science and academic research at the heart of their networks, **drives cosmetic research** through public-private partnerships associating nine partner universities (Orléans, Rouen, Tours, UVSQ, Le Havre, Cergy-Pontoise, Paris 13, Paris-Sud, and Sorbonne University), renowned research institutes (CNRS, INRA, SOLEIL, and LNE), and cosmetic industry firms.

The cluster has thus far launched and certified **over 320 projects** with a global budget of nearly €400 million. They include the project that yielded Perfugard, winner of the 2014 IFSCC Innovation Prize, and the ALOCA project behind the hair care active ingredient Greyverse, awarded the 2018 in-cosmetics Global Innovation Prize. Other projects, including research into the use of ultrasound to produce fragrances without alcohol or of sugar derivatives that have effects on skin pigmentation, will lead to the upcoming release of new products.

Cosmetic Valley has also established dedicated programmes like Cosmetosciences, a major research and training initiative led by the University of Orléans in partnership with the University of Tours, the CNRS, and the Studium, and backed by the Centre-Val de Loire regional authority.

MAKING A SUCCESSFUL DIGITAL TRANSITION

The digital revolution is under way and, voicing the three needs of innovation, customization, and availability ('anytime, anywhere, any device'), its impacts are felt all along the value chain, from development, production, packaging, and distribution up to final consumption. Accordingly, Cosmetic Valley is determined to wed cosmetics and digital technology, two leading sectors of the French economy, to avoid the Kodak error of losing its place on the podium of global industry for lack of timely investment in new technology. The cluster has resolved to make digital technology the focus of 10% of its research projects, and through its Beauty Tech initiative and Chartres-based Connected Beauty programme, it is acquiring the tools needed to create, incubate, guide, develop, and federate French digital cosmetic start-ups.

TRAINING AND DEVELOPING THE SKILLS OF PROFESSIONALS

Credit for France's leading position on an international market is due to a skilled workforce possessing advanced expertise that is the envy of the countries with which we compete. These first-class human resources require constant skill development and training.

Cosmetic Valley offers many tools to serve this purpose: a **selection of training courses** conducted at regional locations, nearest to participants' workplaces to facilitate attendance, and **a dozen specialized conferences**, which are excellent vehicles for scientific communication and training.

GLOBALIZING THE NETWORK WHILE REMAINING ITS DRIVER

Each year, French fragrance and cosmetic industry exports net as much as 150 Airbuses or 400 TGVs. Exports propel SME growth in the French cosmetic industry, which greatly benefits from the reputation of French manufacturing. For this reason, Cosmetic

Valley **supports SMEs in developing their strategy for access to the international market** through participation in a dozen international trade fairs per year, with the cooperation of Business France.

A second focus of efforts for the cluster has been the **development of international cooperation**, to afford French SMEs access to exclusive contacts in various countries abroad who can lighten their task of prospecting and positioning themselves on export markets. Thus, in 2016, Cosmetic Valley took the initiative of creating the Cosmetics Clusters International Network (CCIN), the leading global cluster network dedicated to fostering international cooperation for cosmetic innovation. The CCIN was established in partnership with France Clusters and currently includes 21 international clusters. It is behind the launch of the Cosmetics4Wellbeing project, which has received support from the European Commission. Four CCIN members—the Barcelona Beauty Cluster (Spain), Cosmetic Valley, the Transylvanian LifeStyle Cluster (Romania), and the Beira Baixa Business Association (Portugal)—are part of this project that aims to create a European cluster and define a strategy for supporting cosmetic SMEs in their efforts to enter foreign markets.

UPCOMING
FOREIGN TRADE
FAIRS

13 & 15 NOV.
2018
HONG-KONG
Asia World Expo

14-16 NOV.
2018
HONG-KONG
Convention &
Exhibition Centre
(HKCEC)

NEXT
CONFERENCES

14 & 15
November
2018
CHARTRES
Regulatory Issues

14 March
2019
PARIS
Olfactory Properties
& Outlook

6 & 7
February
2019
CERGY PONTOISE
C.O.M.E.T (Testing
& Metrology)

MEMBERS OF THE COSMETIC CLUSTERS INTERNATIONAL NETWORK (C.C.I.N.)

- **France**
CIIME, ADEBIOTECH, TRIMATEC, UESS - European University of Scents and Flavours, CBB CAPBIOTEK
- **Japan**
Japan Cosmetic Center
- **Madagascar**
Madagascar Essential Oil Cluster
- **Morocco**
MENARA Cluster
- **Portugal**
Beira Baixa Business Association (AEBB)
- **Romania**
Transylvania LifeStyle Clusters
- **Spain**
Barcelona Beauty Cluster
- **Switzerland**
Tissue Engineering for Drug Development and Substance Testing (TEDD)
- **Tahiti**
Tahiti Fa'ahotu
- **Taiwan**
Taiwan Beauty Valley
- **Thailand**
Thailand Center of Excellence for Life Sciences
- **Tunisia**
Tunisia Dates & Palm Cluster, Cluster 2TS
- **Ukraine**
Effect JSC

COSMETIC 360

Under the banner of innovation



30 start-ups
5 000 visitors
50 countries

“Innovation is the banner of Cosmetic Valley. The steps that the competitiveness cluster has taken over the last twenty years to lead companies to international markets, train their managers and researchers, increase the number of industrial and collaborative research projects, and pool resources has made the industry stronger, bolder, and more visible. These measures would not have been appropriate had the cluster not first developed the agility and capacities of member companies. Faced with competition, a changing world, and a digital revolution, this is the only way to lead the pack.”

Marc-Antoine Jamet, President, COSMETIC VALLEY

Launched by Cosmetic Valley in 2015, the Cosmetic 360 trade fair—the only one created as a French initiative with French governance and funding—is now one of the leading world gatherings of a booming industry. The estimated value of the international market for fragrances and cosmetics in 2017 was €419 billion according to Euromonitor. The number of consumers is expected to grow 40%, reaching 6.3 billion by 2030. It is held every year at the Carrousel du Louvre, a landmark site in the heart of Paris. **Its next edition will take place on 17 and 18 October 2018.**

At a time when digital technology, connected beauty, artificial intelligence, and biotech are opening new horizons, Cosmetic 360 unabashedly affirms its aim to **welcome the global movers and shakers in innovation to Paris** and shore up the leading position held by an industry that is one of the treasures of the French economy.

Opened in 2015 by Emmanuel Macron, then French Minister of the Economy, Industry, and Digital Technology; in 2016 by Xavier Niel; and in 2017 by Benjamin Griveaux, Junior Minister of the Economy and Finance, Cosmetic 360 is an exceptional showcase of creativity in all fields: Raw Materials, Formulation & Manufacturing, Testing & Analyses, Packaging, and Cosmetic Industry Support Functions.

An excellent setting for meeting and networking with industry professionals, Cosmetic 360 now more than ever seeks to help the projects of innovative companies progress and succeed, extending the range of what is possible for them through contact with the industry’s players—big brands, SMEs, start-ups, public and private research laboratories, and innovation support experts—all gathered for one event.

FOURTH ANNUAL COSMETIC 360 TRADE FAIR

Partnering with the CNRS to host the planet's greatest innovators in Paris

For its fourth edition, the Cosmetic 360 trade fair has had a makeover: it is now bigger and more attractively designed and offers denser scientific content, thanks to close collaboration with the French National Centre for Scientific Research (CNRS), which was closely involved in the organization of the event.

A major research institute on the global stage, the CNRS has **designated cosmetics a priority area for capitalizing on scientific advances**. In the world of French academia, CNRS leads the pack in number of patents filed. Together with its national technology transfer sister organization, CNRS Innovation, it has put together a portfolio of 180 patent families spanning specialized technologies like vectorization, formulation, and 'dermocosmetic' systems.

This strategy, called Transfer Focus, was bolstered in 2015 through the **creation of the Cosm'actifs research consortium (GDR3711)**, which now includes over 50 laboratories and concentrates its efforts in four main areas: sourcing (bioactive compounds and ingredients); formulation and vectorization; biological models and targets; and safety and spoilage prevention. The CNRS, considered one of the finest R&D institutes worldwide, is represented on the trade fair's steering committee and supports Cosmetic 360 in its endeavour to meet the greatest challenges of the fragrance and cosmetics industry now and in the days ahead. Attendees of this edition of Cosmetic 360 won't want to miss presentations given by CNRS experts during the event.

The Fourth Annual Cosmetic 360 trade fair has received the generous support of:

- **Greentech** (Platinum Sponsor)
- **LVMH** (Gold Sponsor)
- **Laboratoires Bio-Ec** (Gold Sponsor)
- **Beauty Tech Chartres** (Gold Sponsor and start-up programme partner)
- **COTY** (Gold Sponsor and start-up programme partner)
- **Rodan + Fields et BW Confidential** (Cosmetic 360 Award Sponsors)
- **Premium Beauty News** (conference programme partner)

COSMETOLOGY RESEARCH

Tech Corner: Green Factory of the Future

Continuous production of a cosmetic cream: Live demonstration at trade fair

Since 2017, Cosmetic 360 has lent prominence to research in cosmetology by spotlighting a cutting-edge scientific project in a special area known as the Tech Corner. Last year the PlasmaJet project was its focus. This year at the Tech Corner we present the Green Factory of the Future, which showcases technology developed by the CNRS and the LTeN (Nantes) and GEPEA (Saint-Nazaire) research laboratories, specialized in manufacturing processes and microfluid science for various applications.

The Green Factory of the Future innovates in the manufacture of emulsions, which are mixtures of water and oil that are the base of cosmetic creams and lotions now on the market. It permits continuous production of very fine, hence stable, emulsions using a minimal number of stabilizers.

The Green Factory of the Future thus constitutes a breakthrough in three different respects, permitting:

- continuous production of what the industry currently only manufactures in batches, with vessels needing to be cleaned in between
- use of fewer additives to stabilize product formulas
- environmental impact reduction

Currently developed at laboratory level, the technology has yet to be adopted by the cosmetics industry. This breakthrough process destined to greatly affect cosmetic production in the years to come will be unveiled for trade fair attendees during a live demonstration.

The Green Factory of the Future is just one of the major projects backed by Cosmetic Valley, which is spurring cosmetic research on a national scale that is nurturing an environment of innovation.

SMEs

Showroom for French products

Over 140 French exhibitors and three pavilions representing French regions

SMEs account for 80% of the 1,500 companies on the French fragrance and cosmetics industry map. Cosmetic Valley gives them high visibility at the trade fair. At this year's Cosmetic 360, there will be three pavilions for the regions where the cluster has its headquarters and branches—Centre-Val de Loire, Nouvelle Aquitaine, and Normandy—while representatives of SMEs from all across France will be stationed along the aisles of the exhibition space.

As a door opened wide onto the world community, Cosmetic 360 aims to lead members of this French SME network to the international stage. To develop the French ecosystem, Cosmetic Valley, with support from big clients and top universities, has spent 20 years shaping and strengthening the network on a national scale. It is now the largest in the world of its kind.

The Cosmetic 360 trade fair is a pedestal for these SMEs and the values of French production they embody: product safety and efficacy, respect for the environment, quality of materials, and of course, innovation. And it is the place to find international partners with whose help they may develop their export activities on booming foreign markets.

THE COSMETIC 360 AWARDS WILL REWARD THE FINEST INNOVATIONS FOR EACH OF THE FOLLOWING PROFESSIONAL SPECIALITIES REPRESENTED AT THE TRADE FAIR: RAW MATERIALS, FORMULATION & PRODUCTION, PACKAGING, TESTING & ANALYSES, INDUSTRY SUPPORT FUNCTIONS.

START-UPS

Pop-up accelerator for early-stage start-ups

including Beauty Tech workshops

For its fourth edition, Cosmetic 360 is once again eager to welcome fledgling cosmetic companies, which are offered a special zone at the centre of the exhibition space as well as the support of the Beauty Tech network.

Founded by the Chartres metropolitan authority in 2016 as part of the Connected Beauty regional specialization programme, the Beauty Tech network is a federation of innovative start-ups and other beauty industry players. Its goal is to promote synergies between cosmetics and digital technology and support the growth of competitive 'cosmetodigital' start-ups.

Beauty Tech facilitates access to specialized services and incubation programmes, provides opportunities for collaboration between industry firms, and offers means of international promotion. In 2017, to complement these functions, the Chartres metropolitan authority, Cosmetic Valley, and the European Business and Innovation Centre (CEEI-Chartres) **opened the first incubator dedicated to the cosmetics industry**, located in Chartres' Cité de l'Innovation. This project leader support, consulting, and financing structure offers a range of services for start-ups, including workshops and other events throughout the year for incubated firms. These fledgling companies also benefit from all that Cosmetic Valley can offer them: networking, expertise, Cosmet'Up programme participation, and more.

At this year's fair:

- Beauty Tech invites up-and-coming companies of all stripes to employ the **services of its pop-up accelerator**. They are especially aimed at more quickly translating the ideas of early-stage start-ups into tangible projects.
- Coty, partner of the start-up zone, will be assisting with project leader support.

THE TRADE FAIR WILL ALSO BE THE VENUE FOR KICKING OFF THE 'COSMETIC VICTORIES' AND 'START IN COSMETICS' INNOVATION CONTESTS, DESTINED TO UNVEIL THE TALENTS OF TOMORROW.

OPEN INNOVATION

Enhancing cooperation for innovation

Johnson & Johnson,
Pierre Fabre,
L'Oréal Recherche & Innovation,
LVMH Recherche,
Puig,
Rodan + Fields,
Yves Rocher

Innovation is a strategic imperative for the fragrance and cosmetics industry and expected to account for half of the products on the market within the next five years. Accordingly, Cosmetic Valley, whose network includes two dozen major industry players, will be offering an exclusive Open Innovation service at Cosmetic 360. For the fourth edition of the event, representatives from Johnson & Johnson, Pierre Fabre, L'Oréal Recherche & Innovation, LVMH Recherche, Puig, Rodan + Fields, and Yves Rocher will be on hand to meet project leaders and discuss future opportunities for cooperation.

The Open Innovation service concerns all areas of industry activity, including raw materials, end products, packaging, logistics, and associated functions. For project leaders, it provides a unique opportunity to meet with qualified experts and industry leaders.

It should be noted that this is the first year big-name Californian beauty brand Rodan + Fields-and equally legendary Pierre Fabre and Yves Rocher-will be officially present at the event.

**Register by
30 June 2018**

File your request online at www.cosmetic-360.com by 30 June 2018 for a chance to meet an industry representative.

Proposals will be studied by the companies before targeted invitations are extended for meetings, which will take place in a private area of the exhibition floor.

In 2017, over 250 project leaders from about twenty different countries filed requests to benefit from the Open Innovation service.

DIGITAL

Hackathon 3D Challenge: A new challenge just for university students

From concept to product in 48 hours through 3D printing

In 2017, together with LVMH digital tech teams and LVMH companies, the Cosmetic 360 trade fair organized a hackathon dubbed 'Reveal Your Perception'. This year, they're taking it one step further with a new challenge embracing **3D printing**. This technology, which is already rocking the boat in the industrial sector, allows users to flexibly create prototypes and customized objects, at a lower cost.

Back this year in partnership once again with **LVMH**, the hackathon sets students the new challenge of giving substance to their draft projects by producing prototypes on-site with stereolithographic 3D printing. Stereolithography applies photopolymerization to transform opaque or transparent liquid resin into solid slices of a 3D object, layer by layer. The finished item has an elegant, smooth surface perfectly suited for luxury pieces. This event should appeal to gen-X and gen-Y 'makers' who harness new technologies to manufacture small-scale objects in fab labs. 3D printing gives them the opportunity to test their concepts, giving them concrete form to evaluate feasibility. This innovative means of production also makes it possible to apply designs incompatible with classic production methods.

The 3D Challenge Hackathon relays the digital strategy adopted by Cosmetic Valley in 2016. It promises to raise awareness among trade fair attendees about new technology that is associated with the rise of artificial intelligence and destined to become a part of tomorrow's design toolkit for industrial firms.

The 3D Challenge targets university students passionate about innovation and the beauty industry.

Key dates:



INTERNATIONAL

Japan: Honorary guest at the trade fair

A J-Beauty village

The year 2018 marks two anniversaries: 160 years of Franco-Japanese relations and 150 years after the Meiji Restoration. Cosmetic 360 sought to celebrate both events at once by inviting a delegation from Japan and the **Japan Cosmetic Center (JCC)** as guests of honour at the event. The JCC and Cosmetic Valley have enjoyed privileged relations since 2015.

Located in the middle of the exhibition space, the Innovation Japan 360° village, solely dedicated to the JCC cluster, will host a dozen companies and spotlight current Franco-Japanese research projects.

Among the Japanese companies being represented are Toyo Ceramics Co., SKL Sakura Koji Lab, Iwase Cosfa Europe Co., Dainihon Kasei Co., Toyo Beauty Co., Nissha Co., Aroma Bit, and Yu-Best

Over 50 countries

More than 50 countries will also be represented at the fair, including Japan, Taiwan, South Korea, and China—each having its own pavilion—as well as Switzerland, Malaysia, Italy, the United States, Germany, the Netherlands, Belgium, and Poland.

Two major international gatherings to take place during the fair are also on the agenda:

- The **Third Annual Cosmetic Clusters Rendezvous**, to be held on 18 October in partnership with France Clusters and bringing together over a hundred professionals from 18 countries.

Created in 2016 as a Cosmetic Valley initiative, the CCIN meets in Paris every year at the Cosmetic 360 trade fair to discuss progress in international cooperation between its 21 member clusters. The European Cosmetics4Wellbeing project will be a special focus this year.

- The **Annual China Good Products Summit**, organized by the China Cosmetic Newspaper and now in its fourth edition, is a big event drawing CEOs and other industry professionals.

CONFERENCES

‘Theory into Practice’ programme: 16 tandem talks

For a dialogue between academia and industry

Representing a remarkable pool of 150,000 professionals in fragrance and cosmetics, a sector under constant transformation, Cosmetic Valley makes it a priority to offer high-quality learning opportunities to keep them abreast of the latest developments. To this end, attendees of Cosmetic 360 will be able to attend any of a series of conferences whose format exposes them to the contrasting perspectives of academic experts and industry representatives.

The 2018 programme covers a wide selection of topics falling into ten main categories: access to the Russian market; skin health; well-being; eco-design; cosmetopoeia; formulation; connected beauty; reconstructed skin models; regulations; and textures and emotions.

2018 PROGRAMME

Access to the Russian market

- › *‘Doing business in cosmetics in Russia’*-Perfumery & Cosmetics Association of Russia & Ellis Faas

Skin health

- › *‘Early molecular events underlying skin damage & repair in premature ageing’*-Pierre and Marie Curie University (UPMC) & OxiProteomics
- › *‘Why biofermentation metabolite technology is the future of healthy skin solutions’*-Innovation Labo Tokyo & Peaux Cibles

• Cosmetopoeia

- › *‘Cosmetopoeia: Focus on innovative natural ingredients’*-University of French Polynesia & Greentech
- › *‘Tracking extreme longevity secrets: An innovative approach in the study of healthy skin ageing’*-University of Hawaii & ID bio

• Eco-design

- › *‘Disruptive, innovative, eco-design shower’*-Gingko 21 & Yves Rocher

Formulation

- › *‘WPE® Technology: A new approach to cosmetic delivery’*-AR2i & SCM Cosmétiques & SFC
- › *‘The accelerated transport of nourishing solutions into the body’*-TCI Co. LTD & Taiwan Beauty Valley

Well-being

- › *‘From molecules to social practices: Cross-disciplinary approaches, science, and tradition in cosmetics’*- Université Grenoble Alpes (UGA), Cosmétothèque & the CNRS

• Connected beauty

- › *‘Leverage effect of smart samples powered by mobile visual recognition’*-My pack & Puig
- › *‘Data-driven customisation: Leveraging collective and expert intelligence for home-made cosmetics’*-Xico & Beauty By Me

• Reconstructed skin models

- › *‘New 3D in-vitro test method for skin sensitisation assessment’*-Oroxcell & Pierre Fabre Dermo-Cosmétique
- › *‘Development of an ex-vivo re-innervated skin model to assess active ingredients’*-Johnson & Johnson & UBO Laboratory of Epithelial-Neuronal Interactions

Textures and emotions

- › *‘In-vivo techniques for emotions of nude textures’*-EMOSPIN & SEPPIC

• Regulations

- › *‘Natural and organic cosmetics according to ISO 16128’*-FEBEA & UNITIS
- › *‘Towards a guideline for the evaluation of the antimicrobial properties of cosmetic packaging’*- Université de Rouen LSM & APTAR

The dissemination of knowledge is an essential part of supporting fragrance and cosmetics companies and increasing the visibility of our industry. This mission is fulfilled through a collection of works whose authors hail from Cosmetic Valley’s broad network of companies, research institutes, and training centres. Discover two new books on the trade fair bookstore’s shelves:

Conception des Produits Cosmétiques-La Formulation [Cosmetic product design-Formulation] (2nd edition) by Anne-Marie PENSE-LHERITIER.

Évaluation des Produits Cosmétiques-La Sécurité [Cosmetic product evaluation-Safety] by Marc FEUILLOLEY and Nicole ORANGE.

COSMETIC VALLEY IN NUMBERS

(JUNE 2018)

- **1,500 companies on the French fragrance and cosmetics industry map** including a majority of SMEs (80%) and over a hundred big brands.*
- **€30 billion** in turnover; **150,000 jobs**
- **All cosmetic industry specialities represented**, including raw materials and ingredients, formulation, packaging, quality control and testing, POS, plastic injection, and logistics
- **9 member universities**: Orléans, Rouen, Tours, UVSQ, Le Havre, Cergy-Pontoise, Paris 13, Paris-Sud, Sorbonne University
- **Renowned research institutes**: CNRS, INRA, LNE, SOLEIL synchrotron
- **136 educational tracks**, through ISIPCA, IMT, EBI, INSA CVL, France Business School, and other institutes, with a total enrolment of 100,000 students
- **Backing from the national government and 25 local authorities in 3 regions**: Centre-Val de Loire, Normandy, Nouvelle Aquitaine.
- **8,170 researchers and 226 laboratories** in the field of public research
- **320 certified collaborative research projects** (€400 million invested in research)
- **Involvement of 345 companies and 240 laboratories** in the public sector
- **8 innovation centres**

COSMETIC VALLEY MEMBER COMPANIES AND THEIR BRANDS

Alès:	Phyto, Lierac, Caron, Ducastel.
Clarins:	Clarins, Muggler, MyBlend, Azzaro.
LVMH:	Christian Dior, Guerlain, Parfums Givenchy, Kenzo Parfums, Benefit Cosmetics, Fresh, Make Up For Ever, Acqua di Parma, Perfumes Loewe, Francis Kurkdjian.
L'Oréal:	Lancôme, Giorgio Armani, Yves Saint Laurent Beauté, Biotherme, Kiehl's, Ralph Lauren, Shu Uemura, Cacharel, Helena Rubinstein, Clarisonic, Diesel, Viktor&Rolf, Yue Sai, Maison Margiela, Urban Decay, Guy Laroche, Paloma Picasso, Proenza Schouler, L'Oréal Paris, Garnier, Maybelline, ShofSheen Carson, Essie, Nyx Cosmetics.
PUIG:	Paco Rabanne, Nina Ricci, Prada, Valentino, Jean-Paul Gaultier, Comme des Garçons, Carolina Herrera.
Pierre Fabre:	Eau Thermale d'Avène, Ducray, Klorane, Elancyl, A-Derma, Galénic, René Furterer, Pierre Fabre Dermatologie.
Rocher:	Yves Rocher, Dr Pierre Ricaud, Daniel Jouvance, Kiotis, ID Parfums, Flormar Sarbec: Jacomo, Corine de Farme.
And also:	Hermès, Chanel, Caudalie, Mustela, Nuxe, Eugène Perma, Lampe Berger, Sothys, Sisley.

Multinationals present in France

Shiseido:	Shiseido, Issey Miyake, Narciso Rodriguez, Serge Lutens, Elie Saab, Azzedine Alaïa, Zadig & Voltaire, Byredo, Dolce & Gabbana.
Amore Pacific:	Annick Goutal.
Coty:	Calvin Klein, Chloé, Marc Jacobs, Miu Miu, Bottega Veneta.
Procter & Gamble:	Herbal Essence, Pantène, Head & Shoulders.
Reckitt Benckiser:	Veet, Clearasil, E4.
Johnson&Johnson:	Roc, Neutrogena, Le Petit Marseillais.

FIGURES FOR THE FRAGRANCE AND COSMETICS INDUSTRY AROUND THE WORLD

The world market was valued at \$419 billion in 2017 (source: Euromonitor)

- Turnover for Europe: \$70 billion
- Turnover for USA: \$55,9 billion
- Turnover for China: \$41,1 billion
- Turnover for Japan: \$29,3 billion
- Turnover for Brazil: \$19,9 billion

Growth rate: 7 %.

France is the world leader in this industry. For France, fragrance and cosmetics is the fourth largest economic sector and accounts for:

- €30 billion in turnover
- 150,000 jobs
- €13.6 billion in exports, making France the global export leader (ahead of the US) and netting €10.5 billion.