COSMETOSAFE CONSULTING

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# REPORT: TECHNOLOGISTS NEEDS SURVEY 2023

COSMETOSAFE CONSULTING SP. Z O.O.


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# INFORMATION ABOUT THE SURVEY

- Round II of the CosmetoSAFE Consulting survey was carried out from 24.01- 27.03.2023 by Communicatio PR using the online interview method (CAWI) on the Startquestion web panel.
- The aim of the survey was to identify what are the biggest challenges in the work of cosmetic technologists today.
- As part of the survey, 99 questionnaires were conducted with employees in research and development (R&D) departments in the cosmetics industry.
- The questionnaires were primarily targeted at national cosmetics companies of different development and company size (large companies as well as small operators; companies with long-standing presence in the market and start-ups). At a further stage, the request for questionnaires was made via mailing and/or newsletters from professional organisations: the Polish Association of the Cosmetics and Detergent Industry and the Polish Association of the Cosmetics Industry. We would like to thank both organisations for their support.
- More than 50% of respondents were in the post of: Director, Manager, R&D Manager, Senior Specialist, R&D Expert.
- More than 70% of respondents have been in post for more than 3 years and 55% for more than 5 years.
- 51% of respondents work in companies marketing more than 50 cosmetics per year and a further 25% in companies implementing more than 20 cosmetics per year.
- 79% of respondents work for companies that provide contract manufacturing services (private label), with 57% of respondents also declaring that they provide contract formulation services.
- The results were compared with Round 1 of the survey, carried out from 23.04-08.05.2020, which analysed 102 questionnaires from cosmetics entrepreneurs.

| What position in the company do you currently hold? | |
|---|---|
| Director/Manager/R&D Manager | 35.1% |
| Senior Technologist | 16.7% |
| Technologist | 3.5% |
| Junior Technologist | 6.1 % |
| Documentation Specialist | 11.4% |
| Research Specialist | 4.4% |
| Lab Technician | 0.9% |
| Other, please specify: Senior R&D Specialist, Junior Technology Group Specialist, Lab Manager, Junior R&D Specialist, Project Manager, Product Engineer, Packaging Technologist, Technologist /Purchasing Department, Planning and Registration Specialist, R&D Expert | 13.2% |

| Experience in the position: | |
|---|---|
| < 1 year | 11.1% |
| 1-2 year(s) | 13.1% |
| 3-4 years | 21.2% |
| 5-10 years | 29.3% |
| >10 years | 25.3% |

| What is the average number of new formulas placed on the market in your company? | |
|---|---|
| < 10 cosmetics per year | 6.1 % |
| 11 ÷ 20 cosmetics per year | 18.2% |
| 21 ÷ 50 cosmetics per year | 24.2% |
| 51 ÷ 101 cosmetics per year | 16.2% |
| > 101 cosmetics per year | 35.4% |

# INTRODUCTION

From the end of 2019, cosmetics companies are living in constant change mode. The first market difficulties were felt even before the pandemic officially reached Poland.

Difficulties in day-to-day operations caused by lockdowns, employee absenteeism due to illness or the need to care for other family members, shortages of raw materials, disrupted supply chains, and difficulties in maintaining business relationships have meant that over the past three years we have turned long-term operating strategies into an agile management model. Also in the area of product development technology.

How do R&D departments function in the cosmetics industry today? What challenges do they face? What makes their work more difficult and what makes it easier? We looked at these aspects with the CosmetoSAFE Consulting team in Round 2 of the Technologist Needs Survey, which we invite you to read!

IWONA BIAŁAS, PhD, Eng.

Safety Assessor/CEO
CosmetoSAFE Consulting

# CHARACTERISTICS OF THE COSMETICS INDUSTRY IN POLAND

**Before going on to discuss the results of the survey in detail, let us highlight a few issues that characterise the cosmetics industry in Poland, which will make it easier for us to analyse the responses obtained.**

## UNIQUE CHARACTERISTICS OF THE INDUSTRY

The cosmetics industry in Poland has a unique character among EU countries: we are characterised by a highly fragmented market. On the other hand, our greatest assets are:

- great flexibility and the ability to adapt to change: trends, but also legislative requirements;
- abundant human and machinery resources enable it to compete with manufacturing companies in other EU countries.
- We are currently the 5th largest cosmetics market in the EU: in the domestic market, a significant proportion of the market offer is made up of domestic products (which is somewhat unique in comparison with other markets), on the other hand, exports of cosmetics are gaining in importance.

In the domestic market, we see a relatively short product life cycle, with new cosmetics appearing all the time, which is obviously a result of consumer expectations.
On the other hand, however, product rotations are enforced by retailers, who often set their own quality or conceptual requirements for the products they offer on the shelves of their shops. And let's not forget the growing importance of e-commerce in cosmetics sales.

## LEGISLATIVE STATUS

The current *status quo* legislation has been in place for 10 years (the Cosmetics Regulation was fully implemented in 2013: Regulation (EU) No 1223/2009 with a complete ban on animal testing).

Nevertheless, the adequacy of the law in relation to current practices or market trends has long been debated. At the same time, we are seeing a surge in changes to European ingredient legislation. Consumer pressures in terms of safety requirements for the use of chemicals, as well as environmental considerations, are also increasingly important to the market's appearance.

In 2022 alone, cosmetic ingredients regulations' changes and the implementation of changes in the CLP classification of chemicals (CMR substances) have been implemented for more than 30 substances!

In addition to the changes already sanctioned by law, the industry needs to constantly monitor the progress of ongoing legislative work, the effects of which will be felt in the near future. Reformulations, ingredient replacemnts are nowadays a daily occurrence, if not a significant part of technologists' work.

The changes to the EU's Green Deal concept announced from 2019 onwards today involve huge changes to peri-sector legislation (including chemical, environmental and other legislation). The scale of the changes being designed and already implemented is therefore unmatched today by any previous period in history.

## THE ROLE OF THE CONSUMER

Consumer perception and expectations of cosmetics have also changed over the past decade. We have gone through a transformation of sorts – from being enthralled by new technologies, the possibilities of chemical or biotechnological synthesis – to a string of chemophobic marketing assumptions of the type *free of* – to concepts of sustainability, health and the environment care.

Consumer expectations require companies to be incredibly flexible, open to new concepts and, at the same time, the law obliges us to have proof of the claimed performance of cosmetics. It is incumbent on the R&D and marketing departments to seek innovation, but also to source information along the value chain. The list of requirements for the raw material or packaging dossier is getting longer at an alarming rate.

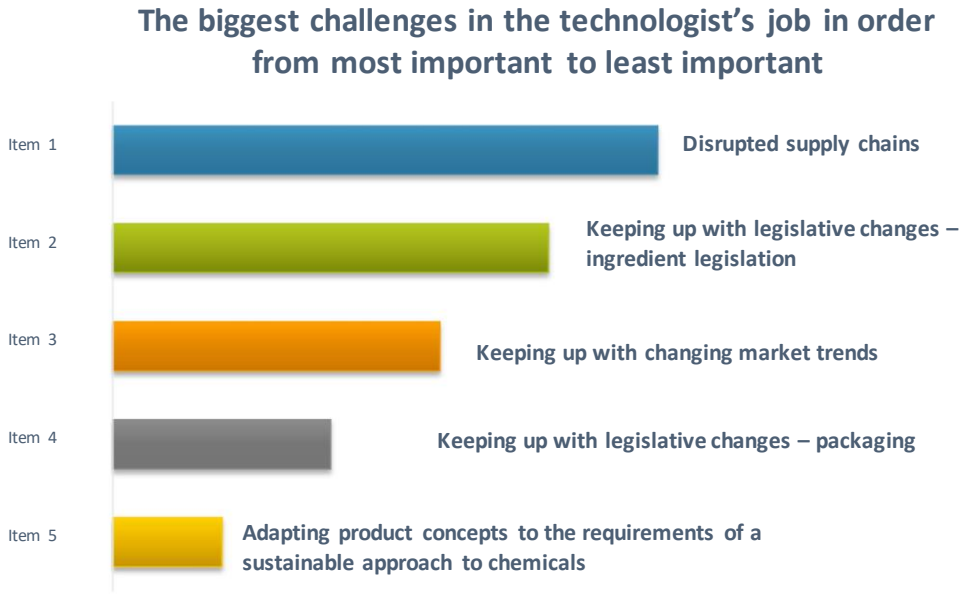
Added to the above set of requirements is the experience of 2020 and 2021, the effects of which are still affecting our operations today, as well as the current geopolitical situation and the war in Ukraine, which is also affecting the operation of the industry in Poland.

# PANDEMIC IN RETREAT, BUT ITS EFFECTS STILL WITH US TODAY

At the beginning of our survey, we asked how technologists find themselves in the current reality. What do they think are the main needs and pain points in their daily work.

We asked respondents to rank the current challenges on a scale from most important (item 1) to least important (item 5). The top three challenges for technologists today continue to be disrupted supply chains (37% of those surveyed ranked the problem as the most important), keeping up with legislative changes in the ingredient area (39% of those surveyed ranked the challenge as number 2 and 35% as number 1!) and adapting the products to changing market trends. Thus, it can be seen that the pandemic repercussions that have been shaping and changing the way the cosmetics industry operates in Poland and Europe for more than three years are still strongly felt in the R&D area.

*A trend emerges from respondents' answers indicating that innovation and keeping up with trends, in today's reality, must give way to the ongoing problems of maintaining continuity of production and keeping up with legislative change.*




Dominant response on a 5-degree ranking scale, n = 99

Among the challenges identified in the individual responses, those in the areas of regulatory change, customer expectations, daily working standards, cooperation with suppliers and, of course, raw materials were particularly prominent. They all understandably overlap, but because of the in-depth questions, we have chosen to describe each of these areas separately.

# AT THE MEETING POINT OF TWO TECTONIC PLATES, OR HOW TO NAVIGATE CUSTOMER EXPECTATIONS

**It turns out that one of the biggest challenges in a technologist's job is customer expectations. Some respondents characterise them as "unrealistic" – not always consistent with market practice and the state of the art.**

It is evident in the respondents' answers that they feel a clear pressure for a low price and speed of product implementation. They also encounter a lack of understanding of what is a dynamic regulatory environment. Interestingly, the emphasis on getting a product to market quickly is paradoxically not at all matched by the pace of work on developing the cosmetic product concept and its formulation. And in recent years, this process has even lengthened significantly.

**This is particularly influenced by the following client-side factors (respondents' answers):**

- lack of a clear final product vision, so that the product is repeatedly changed;
- the expectation of a low price with very strong performance claims;
- the desire to create products that are natural, but have the same application/texture characteristics as products containing e.g. silicones, synthetic film-forming ingredients, etc.;
- lack of legislative knowledge, as well as requirements for law changes' transient periods and underestimation of stability and compatibility testing of products.

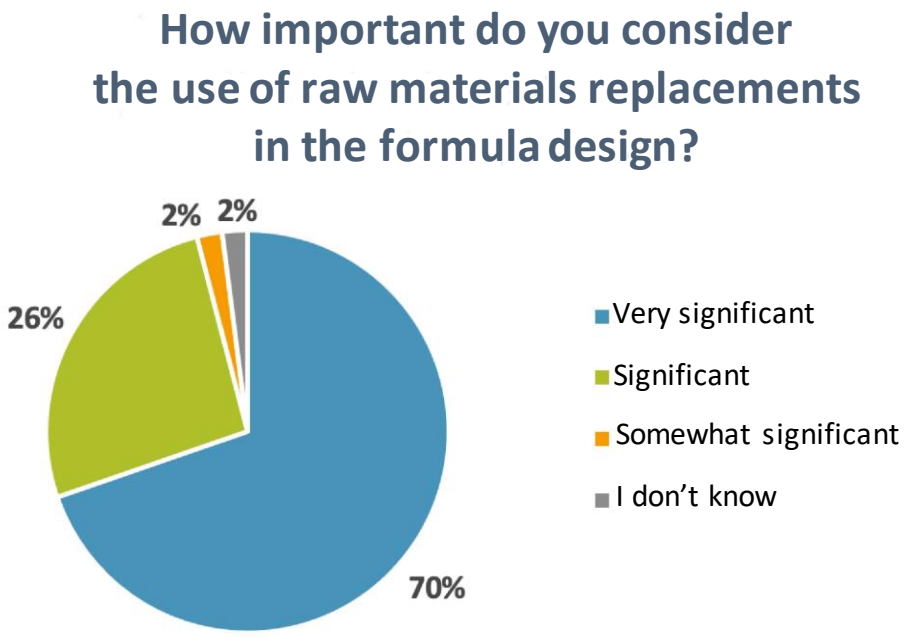
*In the responses of our respondents, it is also apparent how customer expectations have been affected by the creation and rapid uptake of the so-called "black lists" of ingredients, which in many cases have no rational or scientific justification. Despite this, consumers, retailers and cosmetics manufacturers alike are following it.*

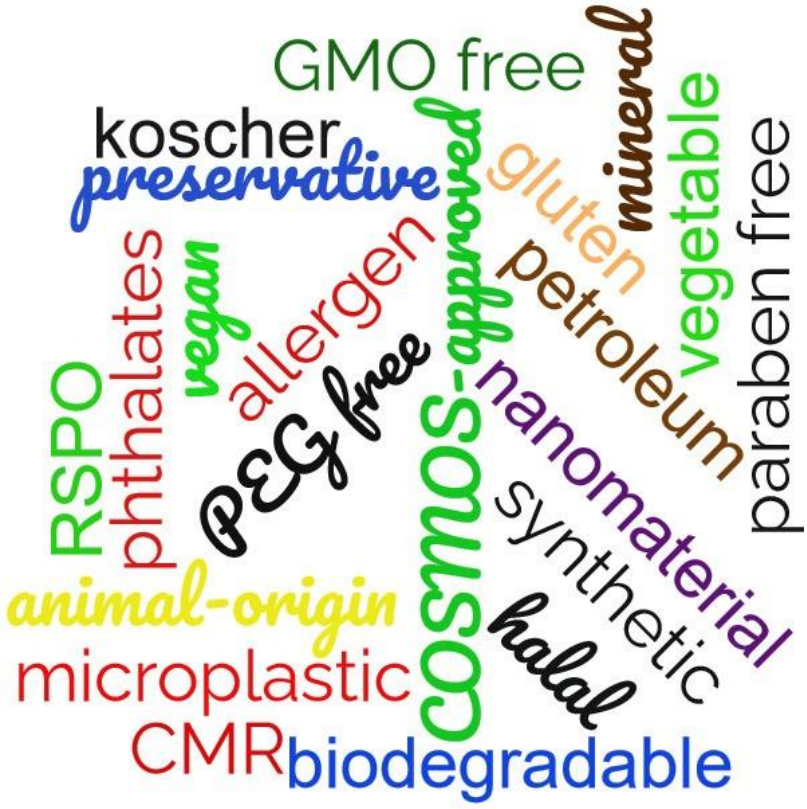
**Meanwhile, the so-called *black lists*, according to technologists, significantly limit formulation options. The phenomenon is compounded by the large retailers, which create their negative lists – restricting the use of certain substances, despite the fact that they are authorised by European law.**

# COSMETIC INGREDIENTS

The topic that generates the most excitement among technologists is, **OF COURSE,** cosmetic raw materials. In this area, respondents primarily highlighted issues that have been the lingua franca for the industry as a whole over the past three years:

1. Raw material shortages make it necessary to quickly find replacements already during the production process. The consequences, in turn, are changes in product documentation, its labelling, packaging, notification.
2. Another issue is the volatility of raw material prices and supply, which makes it virtually impossible to predict the exact cost of products over the long term.
3. Assessment of the raw materials compliance with the current legislation or specified quality parameters. Looking for the raw materials replacements compatible with those criteria.





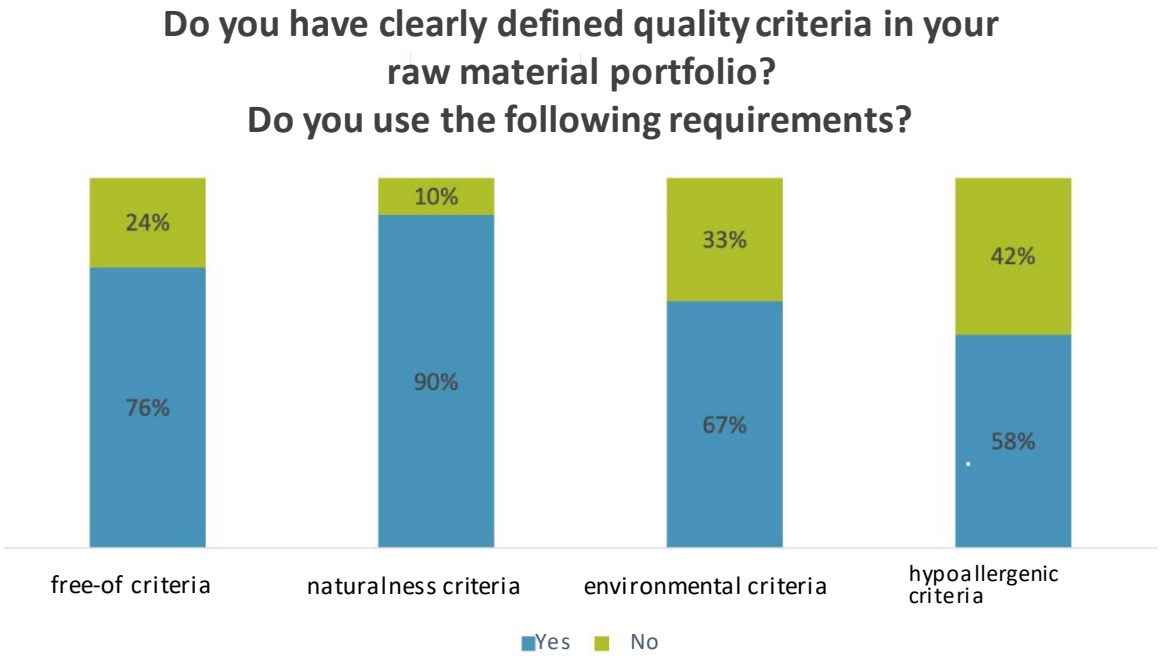

4. In addition to problems with the raw materials availability on the market, the respondents highlighted the role of the *black lists* requirements:

- additional customer requirements network, "more restrictive than current legislation"
- the dynamic lists of banned ingredients, we are seeing a constant expansion of them,
- there is also a strong personalisation of black lists with respect to individual market players (each major customer of private label manufacturing or a big retailer creates its own quality criteria), as well as visible differences in country-specific requirements.

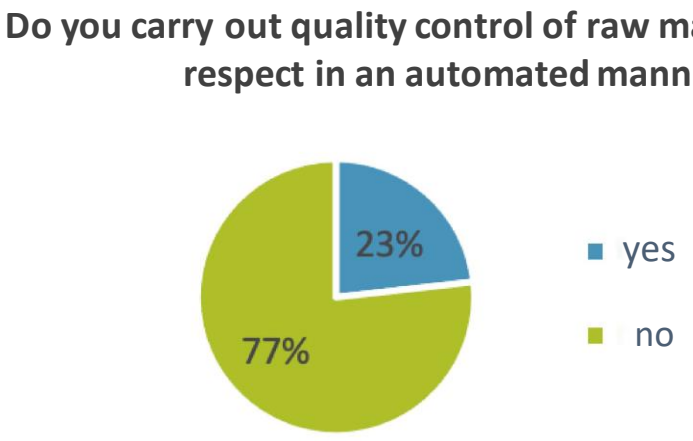
Additional, non-regulatory quality requirements for cosmetic raw materials are a significant practical problem. In addition to the standard raw material dossier elements, like: data on the identification, safety of use and storage of raw materials, their microbiological or physicochemical quality, today we need to "collect" much more information.

This requires the acquisition of specific information that is not available in the "standard" raw material dossier. The different data presentation format, the supplier specific workflows and sometimes the lack of awareness of suppliers regarding the raw materials quality requirements mean that technologists today spend a large part of their time gathering and processing raw material information.

We checked whether our respondents had clear quality criteria in their raw material portfolio. We have grouped them into 4 intuitive categories. By far the most popular criteria are naturalness (90%) and "*free of*" (76%). Environmental criteria are used by 67% of respondents and hypoallergenic criteria by 58%.




How, on the other hand, is quality control of raw materials carried out? Only 23% of respondents indicated that they conduct it in an automated manner.



# COOPERATION WITH SUPPLIERS – OR I CAME WITH A REQUEST

**The shortages of cosmetic raw materials caused, among other things, by disruptions in supply chains around the world has led to a situation where today it is suppliers who dictate the terms of cooperation with cosmetic companies. Cooperation with raw material suppliers is an area that recurred in many questions as one of the biggest challenges in the work of technologists.**

## Why is this relationship so challenging?

One of the main objections raised against raw material suppliers is the lack of information about company decisions and planned responses to regulatory changes. Suppliers are making last-minute changes to their raw material portfolio without informing contractors in advance of what steps they are planning. According to the companies, the optimum solution to this issue would be to prepare decision trees, showing what the supplier plans to do if changes occur on a particular dimension.

*According to those interviewed, "raw material suppliers are slow to react to legislative changes, even slower to make changes to documentation. What's more, it has to be requested repeatedly, as do samples of replacements."*

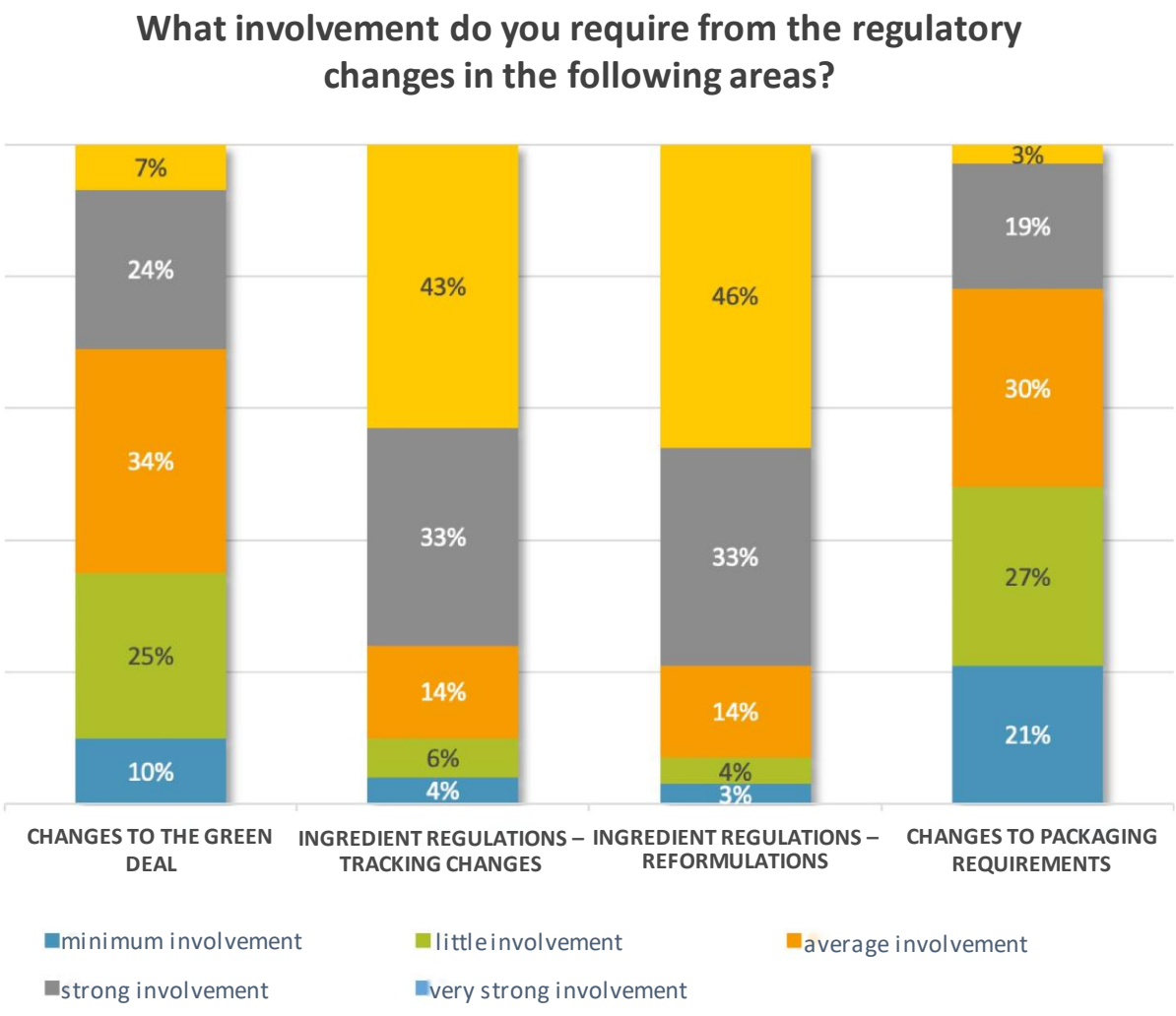
Another difficult aspect in the supplier-technologist relationship is raw material dossier. Clients of cosmetic manufacturing companies often expect far more accurate data than the distribution company provides. Very often, key data for technologists is missing, documents are sent late and all updates have to be requested in person.

*From the opinions of our respondents, what definitely makes working with raw material dossier difficult is the lack of a uniform "format" in terms of the information provided. Each company works on a different documents template, uses different data and presents it in a different way. Working on data from several suppliers is therefore very time-consuming.*

# REGULATORY ROLLER COASTER

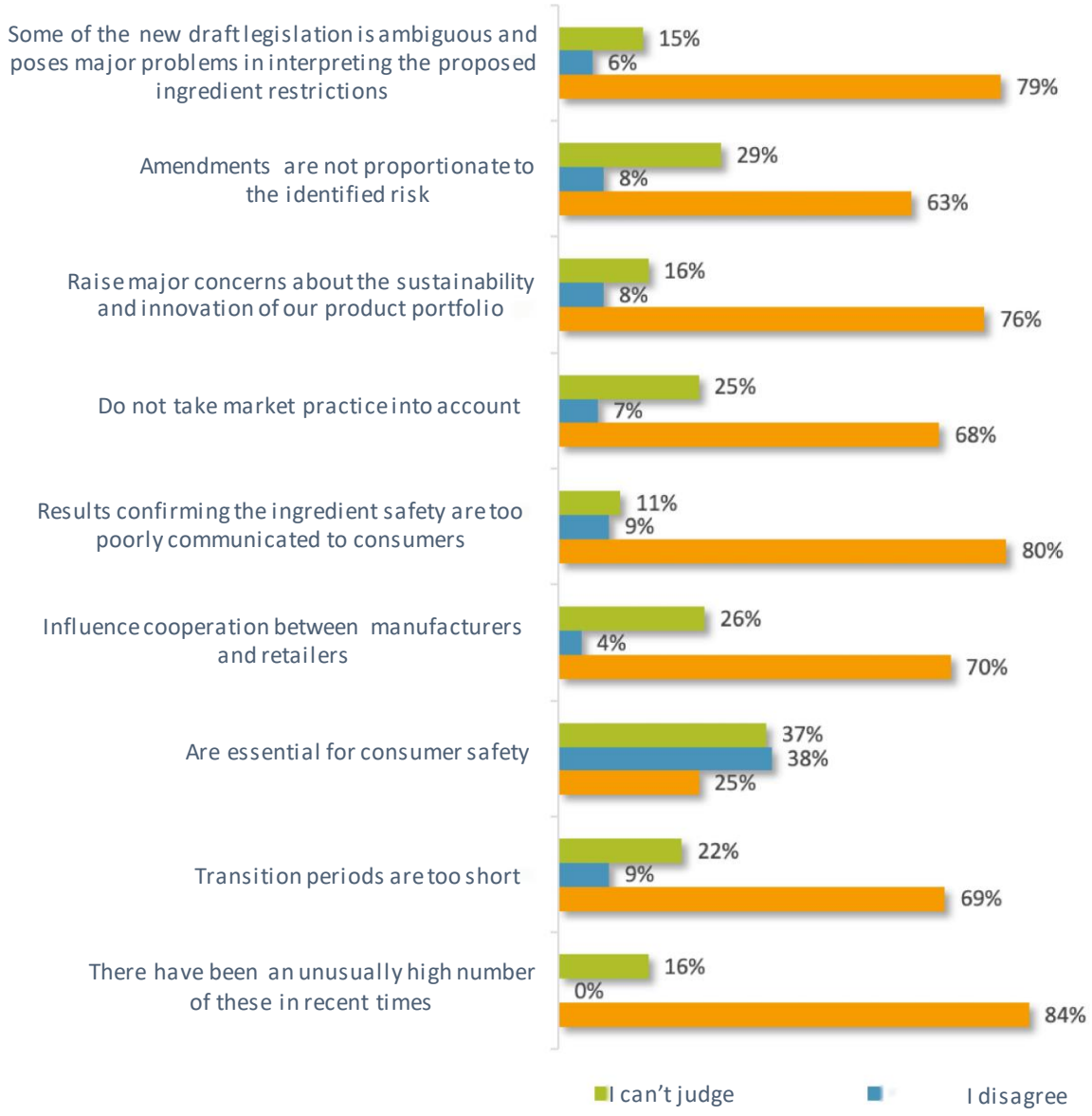
The last decade in the cosmetics manufacturing market has been a regulatory roller coaster, where every now and then we hear about more cosmetic ingredients being called into question. Unsurprisingly, it is ingredient regulation that requires the most involvement in the day-to-day work of technologists. According to 76% of respondents, a high or very high level of involvement is required to keep up to date with regulatory changes, and according to 79% product reformulations related to these changes.

A challenge that the industry has been preparing for several years is also the Green Deal legislation. However, this issue is currently still around the mid-point of the scale of interest for technologists and R&D departments.



Technologists' assessment of the legislative changes leaves no illusions.
84% of respondents believe that there have been an unusually high number of these changes recently. 69% note that the transition periods for the introduction of new regulations are too short, and 79% point out that some of the legislation amendments are ambiguous and poses major problems in terms of interpreting the proposed ingredient restrictions and their practical implications.

## Which statements regarding recent and planned changes to ingredient regulations do you agree with?



In contrast, 70% of respondents emphasise that they negatively affect cooperation between manufacturers and retailers. The technologists believe that the current legislative changes are not commensurate with the identified risks (according to 63% of respondents). They raise major concerns about the stability and innovation of the product portfolio (76%) and do not take market practice into account (68%).

In contrast, when an ingredient undergoing safety reassessment by the SCCS Committee proves to be safe – the results/conclusions confirming the safety of the ingredient are under-communicated to consumers (80%). This leads to a situation where even a safe ingredient is withdrawn from the market by consumer myths circulating online and pressure from buyers.
Examples of such activities and positions in various *black lists* are countless: for example, titanium dioxide, parabens, aluminium compounds, chemical UV filters, etc.

**Recently, we have seen a large number of changes, but also legislative amendments that are not entirely clear or, in our – CosmetoSAFE – opinion, understandable.**

**Examples?**

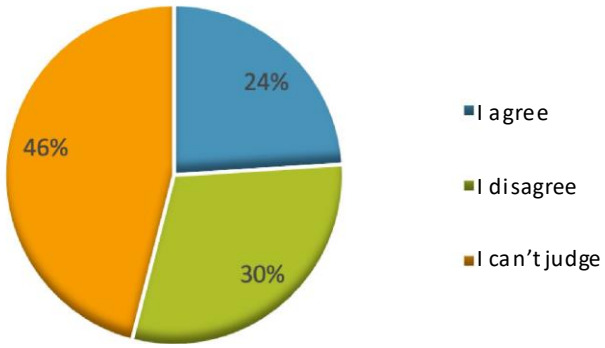
1. Practical implications of the amendment of the preamble to Annex V regarding the label "releases formaldehyde" for formaldehyde donors (Reg. (EU) No 2022/1181) :
   the quidelines for formaldehyde content monitoring & its quantification reference methods
2. Interpretation of UV exposure recommendations in relation to the restriction for Methyl-N-methylanthranilate (Reg. (EU) No 2022/135)
3. Ban for Methyl Salicylate usage in products for children < 6 years of age (Reg. (EU) No 2022/1531)
4. Titanium dioxide – we await the consequences of rescinding Reg. (EU) No 2020/217 on the classification of $TiO_2$ as a carcinogen by the Court of Justice of the European Union, CJEU decision published on 23.11.2022
5. We all remember the market turmoil surrounding the lilial ban, and we are currently awaiting the publication of a regulation banning theophylline (scheduled to be published around mid-2023, and we already know that the ban will be in place from December this year!).
6. Perhaps of greatest concern, is the expected publication of a regulation to expand the requirements for the individual labelling of fragrance allergens – where the current list of 24 substances will be supplemented by more than 50 more items!

## THE GREEN DEAL IN THE OPINION OF COSMETIC PRODUCT TECHNOLOGISTS

The Green Deal is already a reality, and although its final formula and regulations for specific areas are still being worked out, we already know that its impact on the cosmetics sector will be huge. Cosmetics companies will feel it at virtually every level of doing business.

However, from the perspective of the technologists we surveyed, the situation today is still not clear-cut. 46% of respondents cannot predict what impact the Green Deal will have on the competitiveness of the cosmetics industry. 30% rate it rather negatively and only less than ¼ of respondents see the positives in the introduction of the new regulations.

**Do you agree with the statement that the Green Deal will have a positive impact on innovation and competitiveness in the industry**

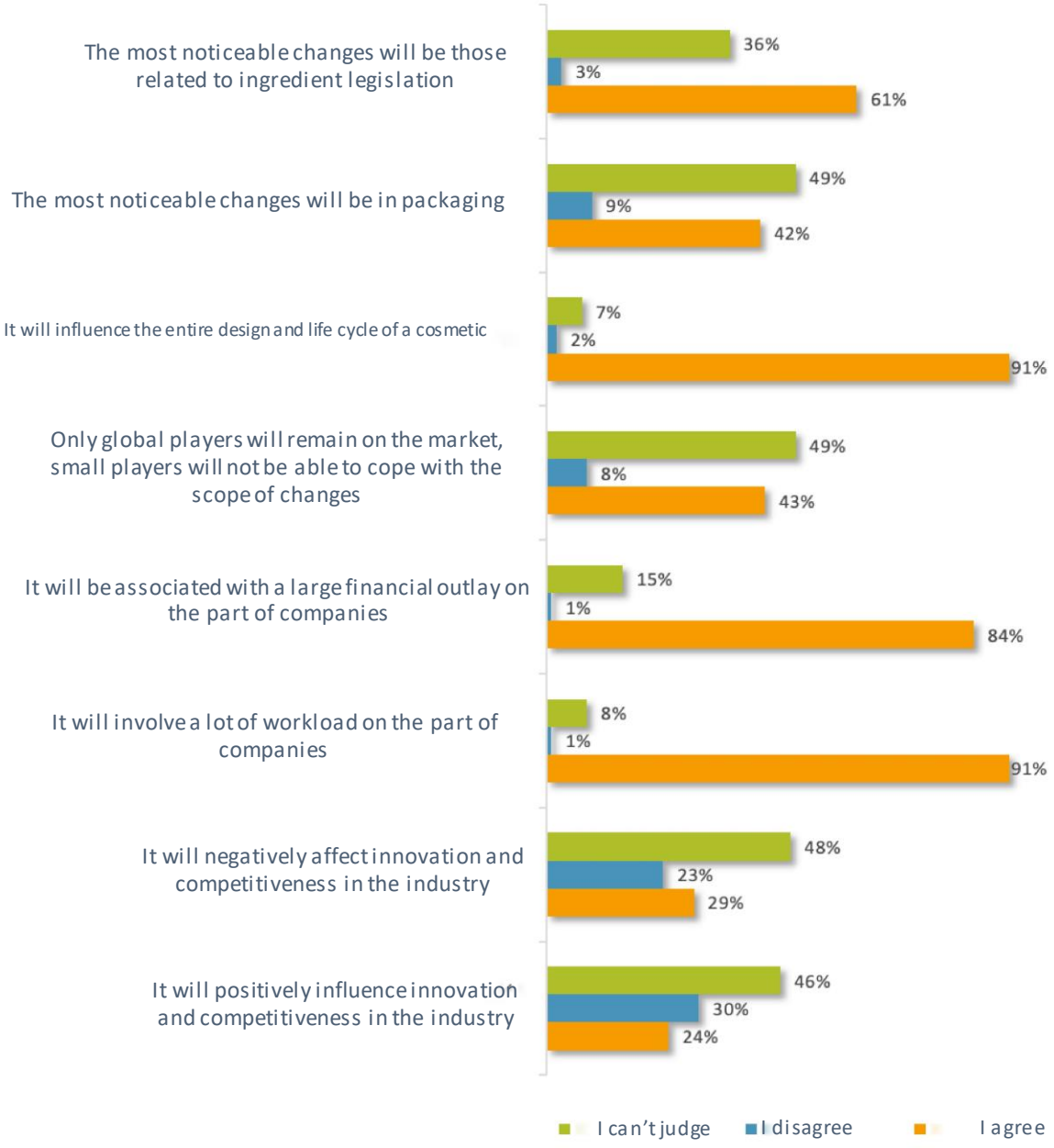



According to survey respondents, there is a high risk that only global players will remain in the market, as small players will not be able to cope with the scope and pace of the proposed changes. 43% of respondents agree with this statement, while 49% do not know how to assess this today.

What can be seen for sure is that the introduction of the principles of the *Green Deal* will affect the entire design and life cycle of a cosmetic (91%). It will involve a lot of work on the part of the companies (according to 91% of respondents) and a lot of financial outlay (84%).

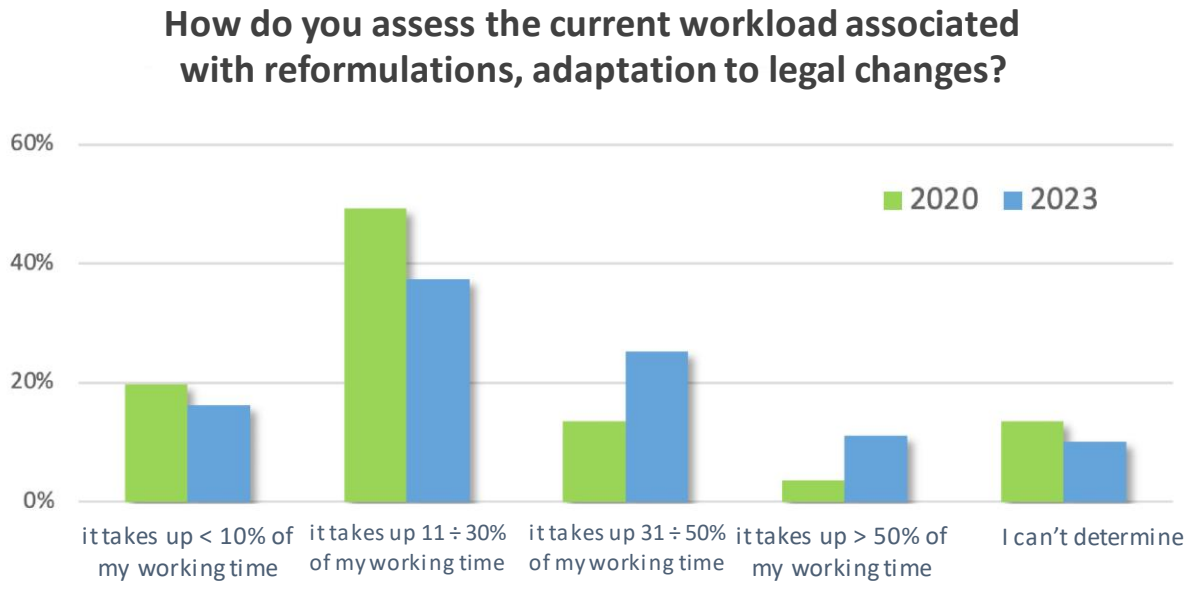
61% of respondents confirm that they feel that the most noticeable changes will be those related to ingredient legislation, and 49% further believe that it will be changes to packaging.

**Which statements regarding the impact of Green Deal-related regulations on the cosmetics market in Poland do you agree with?**




## WORKLOAD ASSOCIATED WITH REGULATORY CHANGES

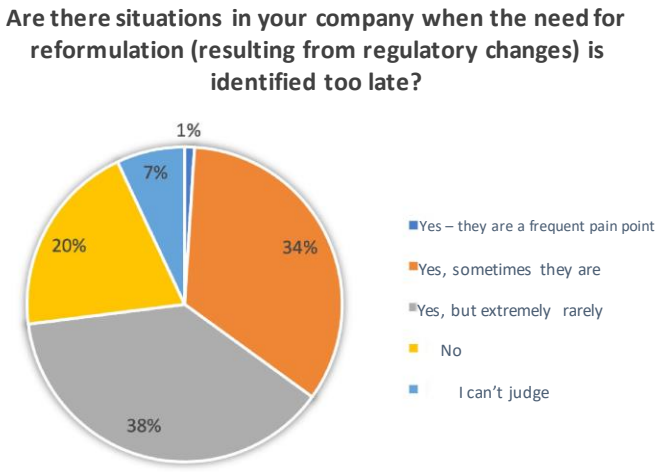
As we mentioned earlier, a technologist's job in today's reality is very much about change management. When asked how much time it takes them to work on product reformulations and to adapt formulations to legislative changes, technologists indicated a decidedly greater commitment to such activities compared to 2020: for 10% of respondents, product updates today take up around 50% of their working time (less than 4% of respondents gave this answer in 2020); for ¼ of people it is between 30 and 50% of their time (almost 2 times as many respondents answered this way as in 2020).




## IS IT STILL THE SAME PRODUCT – OR CONSTANT REFORMULATIONS

We asked whether there are situations in companies where the need for reformulation (resulting from legal changes) is identified too late, e.g. only when they come into force or when it is already too late to implement the changes. 73% of respondents answered in the affirmative, which is a cause for concern, but such situations are not a common problem for most of respondents (only 1% gave such an answer). They sometimes occur in 34% of respondents, while they are extremely rare in 38% of respondents. 20% of respondents said that acting too late does not happen to them.

Overall, this result is encouraging – so far – despite the scale of the changes being implemented, technologists have been able to respond adequately and in a timely manner to the legal changes being introduced.



## PREPARING FOR REGULATORY CHANGES

The surveyed technologists declare an adequate response from their departments to the changes. Let us remember, however, that ahead of us:

- the implementation of the Green Deal legislative combo (revision of REACH, CLP as well as the Cosmetics Regulation);
- we are witnessing an intensification of work by the European Chemicals Agency on the classification of substances (more and more substances are listed as banned substances in accordance with Article 15 of Reg. 1223/2009);
- changes to counter greenwashing force a responsible approach to product creation as a whole and appropriate marketing statements in this respect;
- new packaging obligations;
- entry into force of legislation related to appropriate management and labelling for microplastics, banning the use of cyclic silicones;
- the increasing importance of environmental considerations for the functioning of the industry – new obligations, new taxes, ingredient restrictions;
- the process of updating the EU strategy on the safety of fragrance allergens in cosmetics, which has been ongoing for more than 10 years, has recently crystallised in the form of a draft amendment to the Cosmetics Regulation... The publication of a piece of legislation is expected this year, which is bound to cause great confusion and ... result in further reformulations.

We also checked how our respondents felt prepared in the last category of change, i.e. the expansion of the list of fragrance allergens requiring individual labelling. Only 2% of respondents feel very well prepared for the new regulations, with as many as 57% describing their level of preparedness as poor or very poor.

**How do we achieve this?**

*As the respondents note, "regarding the upcoming allergen changes, it is difficult to prepare for anything without knowing the exact "content" of the documents of the individual fragrance raw materials.*

*This is a huge change, as it will affect virtually all products in the portfolio. It is therefore very difficult to predict how the composition will change and how this will affect the overall product."*

# THE WAY TECHNOLOGISTS WORK

**Among the technologists we surveyed, a lot of comments were made about the standards of their daily work. Technologists face a range of expectations on a daily basis, which revolve around the following issues:**

- Rapid and creative development of new sustainable formulations;
- Efficient implementation of changes to finished products, if the situation requires it;
- A constant search for innovation, while reducing ingredients;
- The various limitations and restrictions in each market, as well as the different formulation requirements adopted by each contract client, or retailer.

**With these expectations in mind, technologists point to a number of problems they face in their activities. Among the most frequently repeated individual responses from respondents there were:**

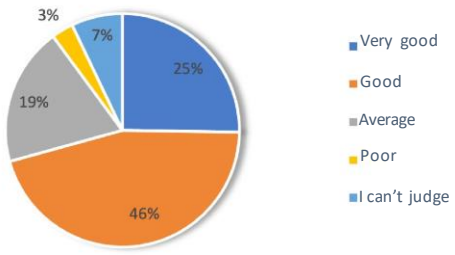
- search for exact replacements from the product/raw material documentation level;
- disrupted raw material supply chain: availability, price volatility – making it impossible to forecast production costs;
- short transition periods for ingredient changes. Too little time to develop a stable formula;
- lack of a single coherent database and clear information on legislative changes provided well in advance.

Reservations of the respondents also concerned the preparation of the team – among others, the lack of competence of the sales and marketing departments, which have a large share in the product concept development, the lack of employees, including laboratory technicians with directional education or the lack of competence of the team for development work, but also the lack of the ability to organise work well, were pointed out.

## DOCUMENTATION IN THE COMPANY

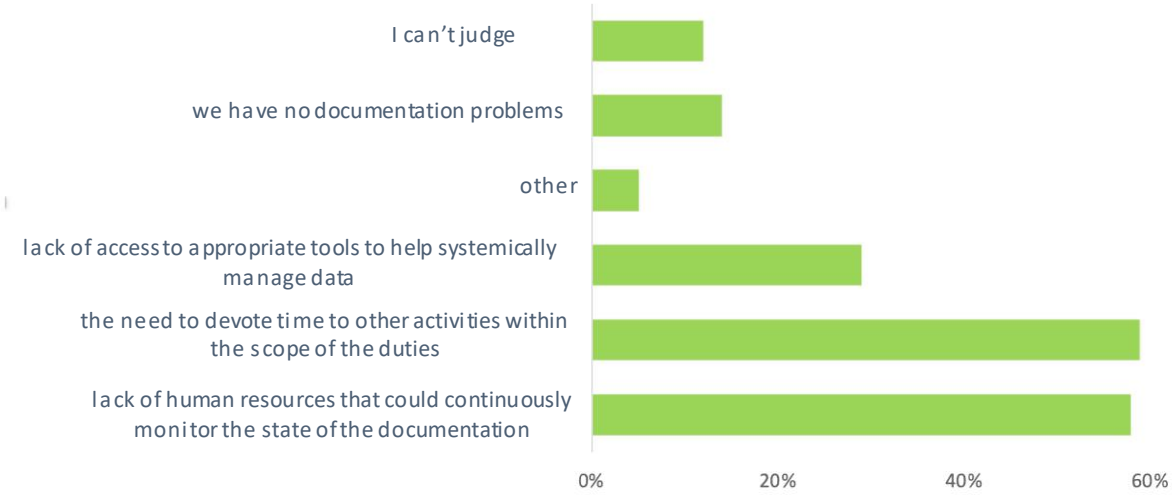
Raw material or product documentation (its collection, updating, archiving) is very often one of the primary responsibilities of the technologist. Respondents asked about the extent to which their company's product information file (PIF) was structured in ¼ indicated that it was very well structured. Almost half (46%) rate the state of its preparation as good, and 19% of respondents are moderately satisfied with the degree to which the documents are in order. On the other hand, in the case of the question about the ordering of raw materials dossier in the company – nearly ¾ (71%) of those asked consider it to be well or very well organised.

**How would you rate the degree of structuring of the product information file (PIF) in your company?**




The most frequently cited reason for problems with getting the documentation in order was the lack of space for activities (other responsibilities) and the lack of human resources to deal mainly with the documentation. Particularly as constant formulation changes generate a huge amount of work to update the PIFs or the products safety assessment.
An additional problem is that the documents provided by suppliers are not prepared according to a uniform model, are sometimes incomplete or even incorrect, or are difficult to obtain.

**What could be the reason for the problem with sorting out raw material documentation / PIF in your company?**



Comparing the answers to this question between 2023 and 2020, it is clear that the documentation problem is growing. In the first edition of our survey, nearly 24% of respondents believed that there were no problems with the documentation in their companies, when today this figure has dropped to 14%. The lack of human resources is a problem indicated by 58% of respondents today, when three years ago it was 33%.

*In our experience of working with cosmetics manufacturers, we can see that the size of technology teams within companies has not decreased, but has even increased. Therefore, this result suggests that updating the documentation today simply requires much more work.*

Interestingly, there is a growing awareness among R&D staff of the possible automatization to their work. In 2020, only 6.2% of respondents complained about the lack of appropriate tools to help manage data in a systemic way, compared to nearly 30% today.

*In terms of the workload involved in keeping data up to date, our respondents also highlight issues with the document managing system. It turns out that in some companies it is still kept in paper form rather than electronically.*

Another point raised in the individual responses of the respondents is the lack of tools, especially a system to link raw materials dossier and the PIF. This issue is particularly felt with the multitude of changes due to regulatory restrictions, the lack of availability of raw materials and rising raw material prices.

Technologists are unable to shut down the issues they are working on and move seamlessly on to the next. Every now and then, they have to go back to a previously prepared PIFs to make e.g. new labelling or change some element of the cosmetic dossier.

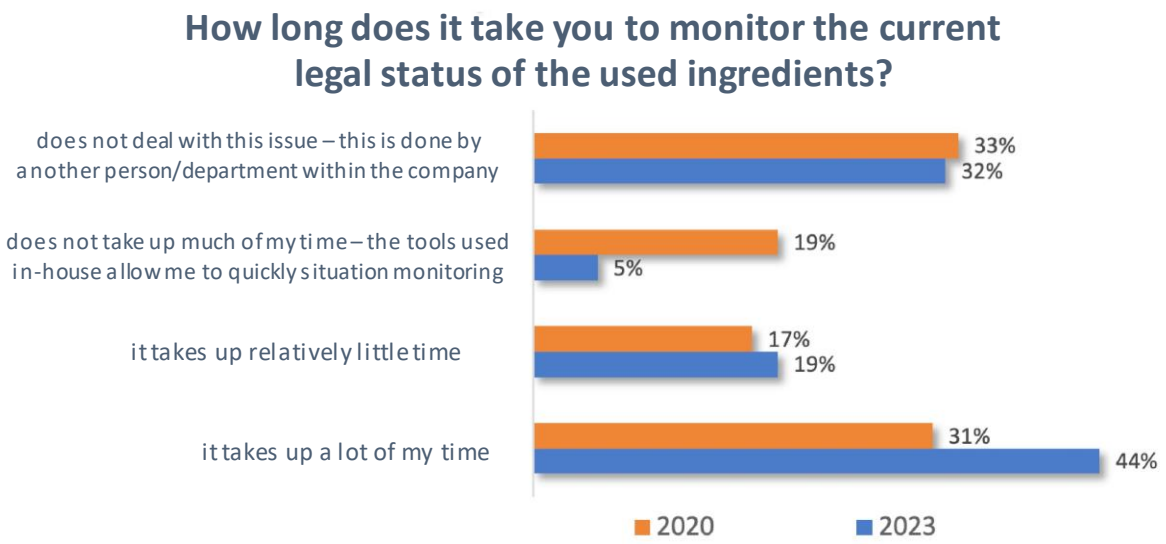
A number of problems are also brought about by regulatory changes. Respondents point, among other things, to ambiguous information in the regulations, limited sources of information and internal difficulties in identifying which products are affected by a particular change.

*"The enormity of the information/legislative changes/consultations means that one would have to spend 1-2h every day following the situation. Staff shortages do not allow this".*

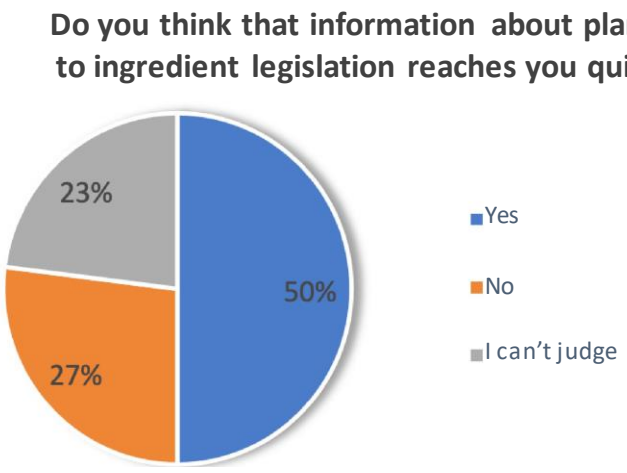
## LEGISLATIVE MONITORING

Another challenge for R&D departments is monitoring the current legal status of ingredients. As many as 44% of respondents indicate that it takes them a long time to do this (a 10% increase on 2020). Only 5% felt that they had the right tools to facilitate this task.

A comparable number of technologists declared that they are not dealing with this issue in 2020 as in 2023. Could it be that, in such a demanding mode of constant change, the role of separate legislative departments is underestimated in Poland?




Half of the respondents answered positively to the question "Do you think that information about planned changes to ingredient legislation reaches you fast enough?". Only 23% were unable to assess the situation and the remaining 27% thought not.

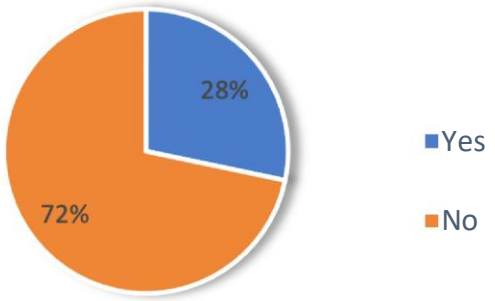


## TOOLS USED IN THE TECHNOLOGIST'S WORK – OR EXCEL RULES

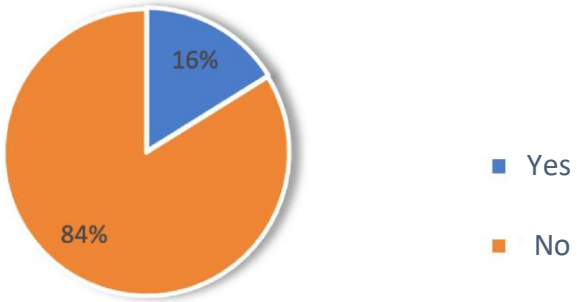
When asked about the tools/software used to create the formula and develop the final product labelling (INCI), 72% of survey participants indicated that they only use Excel.

For formulation costing tools, 84% of respondents also indicated that they use Excel for this purpose. Those who use other software to work with the PIFs most often use ERP or other in-house systems.

**Do you use a program other than Excel to create the formulation and to develop the INCI labelling?**




**Do you use a program other than Excel to calculate formulation costs?**



**Among respondents using Excel as their main documentation management tool, a number of impediments to their day-to-day work were indicated, of which three predominated:**

- high error possibility (human error when entering or reading data manually);
- lack of automation;
- the need to work on many files, working documents and update them continuously.

**Technologists, in the vast majority, declare the need to automate activities in:**

- monitoring of ingredient legislation changes – 94%
- generation of cosmetic INCI labelling – 89%
- generation of formulation data required for legal reasons – ingredient identification data (INCI, CAS, EC); percentage content of the ingredients; impurities/traces/additives monitoring; monitoring of the ingredient status in the area of authorisation, CLP, CMR status – 89%
- formulation cost calculation – 78%
- assessment the raw materials/ formulation compliance with natural and organic criteria according to ISO 16128 – 85% and COSMOS requirements compliance – 79%
- automatic monitoring of the status of authorised ingredients and "black list" – 92%

# CONCLUSIONS

The vast majority of our respondents are experienced technologists with a high level of awareness and practical knowledge of the specifics of the cosmetics market in Poland, current trends as well as the pain points associated with operating in this market.

In today's multi-faceted cosmetic industry, technologists are faced with the difficult task of combining multiple areas. Monitoring legislative changes, changing suppliers' cooperation conditions, constant reformulations and PIFs updates... All this leaves less and less time for innovation and creative, conceptual activities, which is, after all, the main task of R&D departments.

Analysing the results of the survey, it is clear that technologists are aware of the increasing changes in the legislative environment and work in a constant updating mode... And as in many cases – "*Pole can do it*" – works perfectly here! Technologists complain about an overload of responsibilities and an agile working model, but on the other hand, most say that the situation is under control and that changes in companies are being implemented effectively and in a timely manner.

A solution that can help technologists regain the space to address what is most important in their work may be automation. After all, surprisingly, most of them are still using quite basic and limited in their functionality tools in their work.

Automation is also an opportunity for companies to manage their internal know-how well. **Systematisation, unification of the rules of the products or raw materials quality criteria and access to clear rules of the game for everyone involved in the cosmetic product development will certainly contribute to more efficient change management and the additional space for product innovation.**

We wish all technologists more time to spend creating new products – a *back to the laboratory* and less office work and hours spent in "tables and calculators".

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## **Reduces working time** on cosmetic product documentation by half

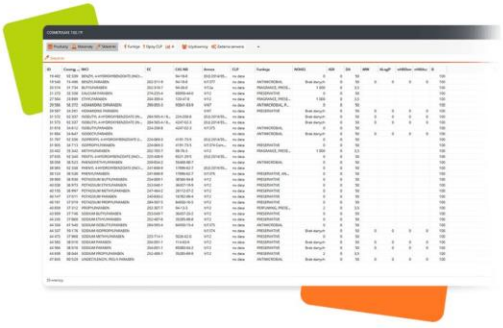
- Automates the process of creating product documentation;
- Helps automate the adaptation of the finished product to the requirements of cosmetic legislation and the company's individual strategy;
- Allows rapid management of formulations, raw materials dossier and related information.


## **Avoids** the most common mistakes

- Enables fast but accurate management and analysis of raw material documentation and other data in the R&D department
- Automatic final products composition & cost calculations
- Automatic INCI labelling
- Automatic assessment of compliance with requirements for marketing declarations
- **You only inspect the documents once and use the well-prepared dossier for all projects!**

## **All information** in one place

- Rapid monitoring of the authorized ingredients status – Integration with COSING i ECHA
- Enables the tracking of black lists and information on banned substances
- Automatic calculation of raw material production costs
- Ability to create your own lists of permitted / forbidden ingredients;



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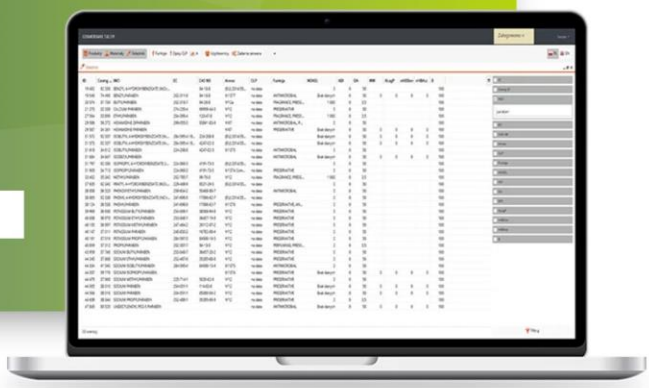

## Got questions? Contact us


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