

BERRY+ S3 partnership Value chain meeting

Activation, progress and next steps of the anti-aging cosmetics
value chain

Helsinki, 28.9.2022

Foundation of Innovative Initiatives, Piotr Piwowarczyk, Malopolska Region

VALUE CHAINS AS ECONOMIC & REGIONAL DEVELOPMENT INSTRUMENTS, based on

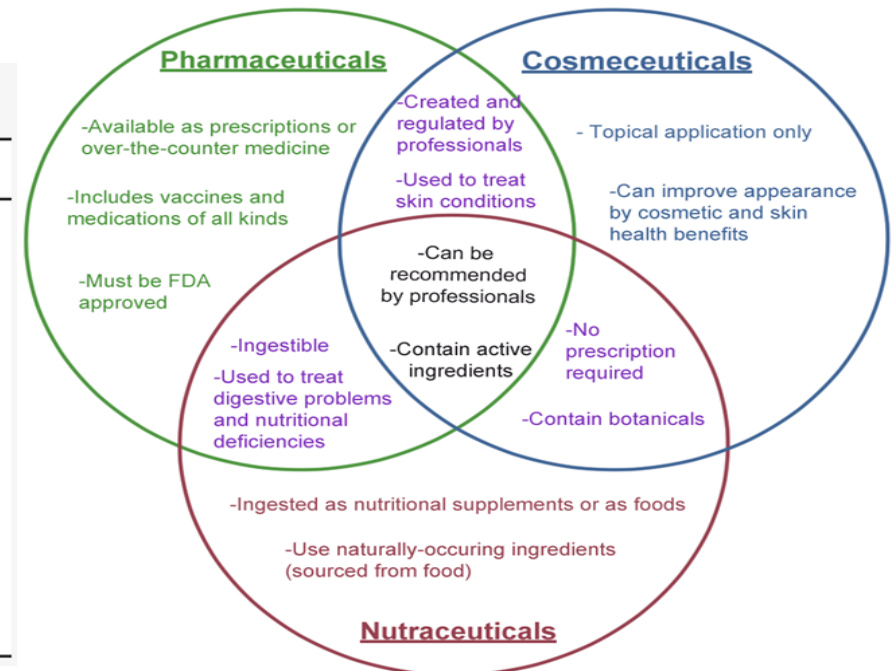
— (1) The EC’s 2020 New Industrial Strategy and the 2021 Updating the 2020 New Industrial Strategy: Building a stronger Single Market for Europe’s recovery, {SWD(2021) 351 final} - {SWD(2021) 352 final} - {SWD(2021) 353 final}, page 10: “The Commission will work in close cooperation with the relevant stakeholders to identify measures to reinforce the EU position in global value chains, including by strengthening and diversifying external trade, creating new opportunities also for low- and middle-income countries”.

— (2) A New European Innovation Agenda, {SWD(2022) 187 final}: “Help create “regional innovation valleys” that will strengthen and better connect innovation players through Europe, including in regions lagging behind.”

Clarifications and interrelations

Table 1. Comparison between cosmetics, cosmeceuticals, and pharmaceuticals [19].

	Cosmetics	Cosmeceuticals	Pharmaceuticals
Objective	Pursuit of beauty	Subsidiary treatment	Treatment and prevention
Subject	Normal skin (unspecified number of people)	Specified number of people who have visited clinics and normal skin	Skin with problems (Specific person, Patients)
Method	Every day, regularly	Long-term	Normally temporary
Ingredients	Wide range of all ingredients	Ingredients focusing on subsidiary effects	Priority on effects focusing on notified ingredients (accompanied by minor side effects as the occasion)



- 1.- Coordinator objective: anti-aging cosmetics industry enhancement by focus on the innovative ingredients and new technologies
- 2.- End market objective: New skin care and hair care products based on the new formulations
- 3.- Value chain mapping:
 - ✓ Roles: supply of raw materials / processing of ingredients, research and development, marketing, distribution,
 - ✓ Actors: suppliers of raw materials and packaging, producers, distributors/intermediaries, research facilities/universities' labs,
 - ✓ Supporting services: business environment institutions / industry organizations, regional authorities, consulting companies
- 4.- Strengths and development interests (Poland/Malopolska Region):

Poland/Malopolska Region	Sample products and INCI (Internatoinal Nomenclature of Cosmetic Ingredients)
<p>Main strengths:</p> <ul style="list-style-type: none"> ✓ a significant share in the export sales of subsidiaries of international cosmetic companies with production plants in Poland, ✓ high quality and competitive price of Polish products, ✓ quick adjustment of the assortment to the changing needs and expectations of recipients, ✓ a growing trend related to a healthy lifestyle and greater ecological awareness, favoring the demand for natural, vegan and dermocosmetics, ✓ national and regional scientific and research potential. For example in Malopolska Region Jagiellonian Center of Innovation performs the research for cosmetics sector - https://www.jagiellonskiecentruminnowacji.pl/en/2184-2/formulating https://www.jagiellonskiecentruminnowacji.pl/en/2184-2/tests-of-cosmetics/ ✓ increasing producers' expenditures in the area of research and development. <p>Main interests:</p> <ul style="list-style-type: none"> ✓ strengthening the export position of enterprises with domestic capital in relation to global companies, ✓ promoting brands of Polish cosmetics on international markets, ✓ extension of the short product life cycle, requiring from manufacturers to constantly introduce new series of cosmetics, ✓ partnership cooperation/ joint actions as a response to the increase in the cost of cosmetics production due to the rising prices of raw materials, packaging, energy, transport and wages, as well as adapting products to EU regulations. 	<p>Moistry Agnieszka Pyrzyk</p>  <p>Natural cream for mature skin: Aqua, Cetearyl Oliviate, Macadamia Ternifolia Seed Oil, Simmondsia Chinensis Seed Oil, Sorbitan Oliviate, Tocopheryl Acetate, Glycerin, Lactobacillus / Acerola Cherry Ferment, Lactobionic Acid, Retinyl Palmitate, Cetyl Alcohol, Hydrogenated Vegetable Oil, Bambusa Arundinacea Stem Extract, Hyaluronic Acid, Sodium Hyaluronate, Arachis Hypogaea Oil, Sodium Lactate, Lactobacillus Ferment, Leuconostoc/Radish Root Ferment Filtrate, Pelargonium Graveolens Flower Oil, Tocopherol, Benzyl Alcohol, Dehydroacetic Acid, Geraniol, Citronellol</p> <p>Source: https://moistry.pl/kolekcja/produkty/naturalny-krem-do-skory-dojrzalej Bielenda Kosmetyki Naturalne S.A.</p> <p>Bielenda Kuracja Młodości</p>  <p>Rebuilding anti-wrinkle serum day/night: Aqua (Water), Glycerin, Trehalose, Butylene Glycol, Snail Secretion Filtrate, Gold (nano), Palmitoyl Tripeptide-5, Hydrolyzed Collagen, Calcium Alginate, Propylene Glycol, Hydroxyethylcellulose, Gellan Gum , Agar, 1,2-Hexanediol, Carbomer, Deceth-7, PEG-40 Hydrogenated Castor Oil, PPG-26-Buteth-26, Potassium Hydroxide, Ethylhexylglycerin, Phenoxyethanol, DMDM Hydantoin, Parfum (Fragrance), Butylphenyl Methylpropional, Linalool, CI 77891, CI 77491</p> <p>Source: https://bielenda.pl/en</p>

5.- Positioning of the interested BERRY+ regions in the value chain (positioning can be on end product, production technologies, design, distribution, production of intermediate goods, raw materials, research priorities, ...)

6.- Discussion on collaboration options, priorities and funding

7.- Next steps

- List of interested regions
- Funding options
- Meetings, initiatives concepts and project preparation

8.- Timetable

