



YEAR *in* REVIEW 2025



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# A MESSAGE FROM THE PRESIDENT & CEO

**“Across the cosmetics and personal care products industry, PCPC’s 2025 initiatives enhanced consumer confidence, empowered member companies, and contributed to a stronger, more responsible global industry.”**

“I am incredibly proud of what we have achieved together over the past year. We successfully launched the Congressional Cosmetics Caucus, uniting bipartisan leaders to highlight the industry’s significant economic impact. We also secured reauthorization of the OTC Monograph Drug User Fee Program through 2030, ensuring regulatory continuity for our members. Across the country, PCPC engaged in more than 30 states, holding nearly 200 meetings with policymakers to advance priorities central to our sector.

“This year also brought a major legal win for our members in PCPC v. Bonta, reinforcing our commitment to protecting the industry from overreaching or impractical regulatory actions. At the same time, we continued our effort to create standardized nomenclature for cosmetics ingredients. INCIpedia database expanded by roughly 1,000 new names and monographs in 2025, reflecting the industry’s relentless pursuit of scientific and product advancement.

“On the global front, PCPC maintained an active and strategic advocacy effort with the U.S. Trade Representative, the Department of Commerce, and congressional offices, pushing to reduce tariffs and compliance burdens that hinder U.S. competitiveness. We provided extensive input across the Administration’s trade consultations throughout the year.

“These accomplishments were made possible by strong collaboration with our members, policymakers, regulators, and international partners. As we look ahead, PCPC remains committed to shaping the future of our industry through innovation, partnership, and a steadfast focus on our core values.”



**TOM MYERS**

President & CEO

Personal Care  
Products Council

# A MESSAGE FROM THE CHAIR *of the* BOARD *of* DIRECTORS

**“It is a privilege to serve a second year as PCPC Board Chair and help guide an industry that touches billions of lives every day.”**

“Our work extends far beyond economic impact. It is about trust, advancing innovation and acting responsibly as we build a beauty industry that truly moves the world forward. In 2025, our industry demonstrated extraordinary resilience and leadership, but our greatest impact will be defined by how boldly we shape the future.

“U.S. consumers are among the most diverse, dynamic and discerning in the world. They set global beauty trends and seek high-performance products that align with their values: safety, personalization, inclusivity and sustainability. Meeting these expectations is not optional; it is fundamental to maintaining trust and relevance in a rapidly evolving marketplace.

“By working together with purpose and shared vision, our industry will continue to elevate beauty as a force for good—advancing safety, sustainability and innovation, while championing a future in which beauty does more than inspire. It empowers people, strengthens communities and improves lives around the world.”



**DAVID GREENBERG**

Chair, Board of Directors,  
Personal Care  
Products Council

Chairman of L'Oréal USA

# BOARD OF DIRECTORS & SENIOR LEADERSHIP\*



## BOARD OF DIRECTORS

**David Greenberg**  
PCPC Board Chair  
L'Oréal USA

**Greg Adamson**  
Givaudan

**Lia Arvanitidou**  
Colgate-Palmolive Company

**Patrizia Barone**  
Unilever

**Pascal Berthe**  
L'Oréal

**Kerry Blissett**  
dsm-firmenich

**Julien Bouzitat**  
Amorepacific US, Inc.

**Joel Burdick**  
Bath and Body Works

**Maria Chiclana**  
Shiseido

**Chris Choi**  
Takasago International Corporation

**Keech Combe Shetty**  
Combe Incorporated

**Amaury DeVallois**  
Coty, Inc.

**Kathleen Edgar**  
Edgewell Personal Care, Inc.

**Caleb Foltermann**  
Henkel

**Michelle Freyre**  
The Estée Lauder Companies  
(Clinique)

**Deborah Gibbins**  
Mary Kay, Inc.

**Laura Harkness**  
Church and Dwight, Inc.

**Debbie Laverty**  
Amway

**Jacqueline Liou**  
LVMH

**Lorinda Loftonbrook**  
e.l.f. Beauty

**Dana Medema**  
Revlon, Inc.

**Andrea Mondoni**  
Beiersdorf, Inc.

**Helen Nethercutt**  
Merle Norman Cosmetics

**Christopher Payne**  
Iredale Cosmetics, Inc.

**George Schaeffer**  
Aloxi International Corporation

**Caroline Schwieger**  
Unilever

**Tara Simon**  
The Estée Lauder Companies

**Harman Singh**  
International Flavors and  
Fragrances, Inc.

**Andrew Stanleick**  
Kenvue

**Dalia Stoddard**  
Rodan + Fields

**Eric O'Toole**  
Wella Company

**Emilie de Tramasure**  
Chanel, Inc.

**Espe Troyano**  
The Procter and Gamble  
Company

**Lionel Uzan**  
Clarins Group USA, Inc.

## COMMITTEE LEADERSHIP

**Patrizia Barone**  
International Steering  
Committee Chair  
Unilever

**Alexandra Bratsafolis**  
State Steering Committee Chair  
The Estée Lauder Companies

**Anne Crews**  
Federal Steering Committee  
Chair  
May Kay, Inc.

**Kathryn Farrara**  
Legal Steering Committee Chair  
Unilever

**Tom Langan**  
Communications Steering  
Committee Chair  
Unilever

**Brian Slezac**  
Science and Innovation Steering  
Committee Chair  
Colgate-Palmolive Company

## PCPC SENIOR LEADERSHIP

**Tom Myers**  
President & CEO

**Heather Helm**  
EVP, Global Strategies

**Stacey Holvenstot**  
EVP, Membership, Marketing,  
& Events

**Emily Manoso**  
EVP, Legal and Regulatory Affairs,  
& General Counsel

**Louanne Roark**  
Executive Director, Look Good  
Feel Better Foundation

**Karin Ross**  
EVP, Government Affairs &  
Strategic Initiatives

**Megan Smith, CPA**  
Chief Financial Officer

**Dr. Jaap Venema**  
EVP, Science, & Chief Scientist

**Tesia Williams**  
EVP, Public Affairs &  
Communications

\*As of December 2025

## ASSOCIATION *at a* GLANCE

Since 1894, PCPC has served as the leading U.S. trade association representing the cosmetics and personal care products industry. PCPC advocates on behalf of its member companies for an effective pragmatic regulatory environment that ensures the global distribution of safe, innovative, and trusted products in beauty and personal care.

PCPC educates policymakers, regulators, non-governmental organizations, retail partners, consumers, and the news media about the complex scientific and regulatory landscape of cosmetics and personal care products, and the importance

of harmonizing global beauty industry regulations.

PCPC and its member companies are united and resolute in their commitment to consumers and to product safety, quality, and innovation.

# BEAUTY *that* DRIVES ECONOMIC IMPACT\*

PCPC brings together teams across departments and partners with industry leaders to advance science, safety, and innovation in the cosmetics and personal care products industry. Through collaboration, PCPC supports its members and promotes consumer well-being.

**\$210.6 billion**  
U.S. market

**4.6 million**  
domestic jobs



People of color represent **33% of the industry's workforce**



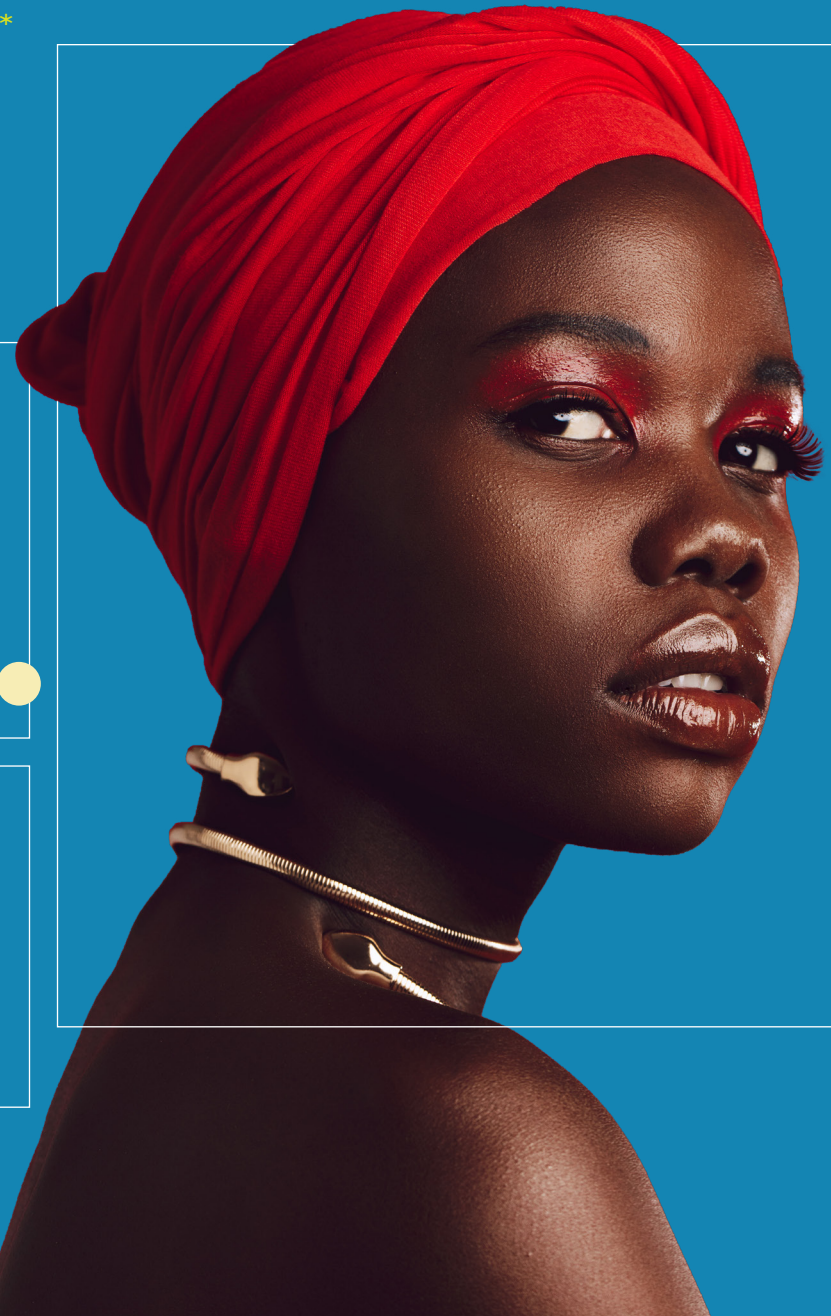
**\$203.3 billion**  
in labor income

**\$569 billion**  
global industry



Employs more than **5,700** science, technology, engineering, and mathematics professionals

**71%** of total employment is in **small businesses** (<50 employees)



**\$850+** average U.S. household spends on personal care products and services



**\$308.7 million** contribution to U.S. GDP

**\$98.5 billion** on wages, incomes, and benefits



Women comprise **79.3%** of the total workforce

Industry participants reduced greenhouse gas emissions by **8.9%**

Donated **\$170 million** to charitable causes in 2020

\*Sources: PCPC Economic and Social Impact Report 2024 and Euromonitor International 2024

# DRIVING ADVOCACY & IMPACT

PCPC's Government Affairs and Legal and Regulatory Affairs Teams delivered results at the federal, state, and local levels. Their efforts reinforced our commitment to science-based policies and supported a regulatory system that advances innovation, safety, and consumer confidence.

## FEDERAL LEGISLATIVE AND REGULATORY INITIATIVES

From testifying before the House Energy and Commerce Health Subcommittee on over-the-counter (OTC) Monograph reform to hosting educational events like "Ice Cream and Sunscreen" in the Senate, PCPC's engagement with policymakers ensured that critical issues (such as sunscreen safety and modernization of regulatory frameworks) remained front and center.

**PCPC launched the Congressional Cosmetics Caucus**, bringing together bipartisan leaders to highlight the industry's economic impact. **Legislative wins included securing OTC Monograph Drug User Fee Program (OMUFA) reauthorization through 2030**, with provisions for transparency and innovation; **advancing the Safe Sunscreen Standards Act**; and obtaining an additional \$2 million in appropriations for the **ongoing implementation of the Modernization of Cosmetics Regulation Act (MoCRA)**. PCPC also championed humane testing alternatives and defended trade and tariff issues to protect global competitiveness.

The association engaged with multiple federal agencies to address regulatory barriers and promote innovation. In May, comments were filed with the Department of Justice (DOJ) and the Federal Trade Commission (FTC) on **anticompetitive regulations, including outdated FDA animal-testing requirements that inhibit sunscreen innovation and costly recycling laws such as SB 343 and SB 54**. Further comments to the Department of Health and Human Services in July focused on deregulatory efforts, while September submissions to

the DOJ addressed interstate commerce issues ranging from recyclability claims to state-specific sunscreen bans and labeling requirements.

PCPC also responded to a federal request for information on deregulatory efforts, highlighting opportunities to increase uniformity and reduce redundancy. Key recommendations included rescinding the voluntary cosmetic reporting program, adopting more flexible interpretations of package labeling requirements and advancing sunscreen reform.

## STATE LEGISLATIVE AND REGULATORY INITIATIVES

**PCPC was active in more than 30 states, conducting nearly 200 meetings with policymakers and hosting lobby days in New York and California** to showcase industry leadership. Through coalitions with over 35 partners, PCPC worked to harmonize legislation, reduce state patchwork, and minimize reformulation burdens. Our advocacy delivered tangible results—defeating ban bills in New York and Florida, amending California's microplastics legislation, and advancing consistent PFAS language across states. PCPC also continued to expand the SUNucate campaign, now law in 29 states and the District of Columbia, with New Jersey enacting it in 2025.

Working closely with regulators, PCPC provided education and information on critical issues affecting the cosmetics and personal care products sector. **PCPC filed 16 public comments across five states:** California, Connecticut, Maine, Minnesota, and Washington. These efforts produced several signifi-

cant wins. The California Department of Toxic Substances Control also dropped ingredient reporting requirements for levels below the applicable thresholds, while Washington narrowed the definition of "intentionally added" in its cosmetics law, citing PCPC's advocacy. Additionally, California removed cosmetics from its priority industry list for quaternary ammonium compounds and microplastics.

**Collaboration with stakeholders was another hallmark of the year.** PCPC refreshed its packaging principles to guide responses to future legislation and regulations, and joined the Circular Action Alliance Partner Trade Working Group to strengthen communication with the only producer responsibility organization in the U.S. PCPC also signed onto coalition letters with groups including the American Chemistry Council, California Chamber of Commerce, Consumer Brands Association, and Household and Commercial Products Association to address state-level extended producer responsibility issues.

**PCPC also achieved a significant legal victory on behalf of members and the industry in *PCPC v. Bonta*.** This First Amendment challenge to the Prop 65 listing of titanium dioxide was successful and demonstrated that the government cannot compel commercial speech that is not supported by consensus scientific evidence.



# PROMOTING *sound* SCIENCE

Product and ingredient safety, quality standards and environmental research strengthened PCPC's influence in scientific and regulatory forums this year. Committees advanced key initiatives, promoted best practices, and shared critical research and data with members. In 2025, the strategic focus was on product safety assessment, defense of cosmetic ingredients, New Approach Methodologies (NAMs), and environmental model development.

## PIONEERING SCIENTIFIC RESEARCH AND PARTNERSHIPS

The Ingredient Defense Group, endorsed by the PCPC Scientific Advisory Committee and in concert with the Regulatory Committee, **supported the continued use of quaternary ammonium compounds, or QACs, in personal care and cosmetic products** through strong scientific advocacy. It was critical to provide credible and robust science to support the continued safe use of these ingredients.

## COSMETIC INGREDIENT NOMENCLATURE AND CONCENTRATION

The INCIpedia database continued to expand in 2025 with the addition of approximately 1,000 new names and monographs, underscoring the industry's ongoing drive for innovation. Several updates were made to enhance the platform's capabilities, including the addition of publication dates, historical revision records and the integration of new ingredient frequency-of-use data derived from current information reported to FDA under MoCRA.

In support of the continuing review of cosmetic ingredient safety, PCPC surveyed 234 additional ingredients for their concentration of use, which is essential information to allow safety assessments.

## SUNSCREEN UV FILTERS

PCPC published four peer-reviewed scientific papers in top-tier journals, including *Critical Reviews in Toxicology*, on the toxicological evaluation of UV filters. All papers were co-authored by PCPC and/or member company scientists, and the data support the conclusion that these UV filters are safe for human use when applied within regulatory limits, and do not demonstrate carcinogenic potential in humans. Additional studies include:

- A large-scale collaborative study between PCPC and two universities measuring UVF levels emitted by bathers was finalized.
- A peer-reviewed paper showing that UVF octocrylene does not adversely impact sea urchin reproduction at levels typically found in marine environments.



# AMPLIFYING OUR VOICE & BUILDING TRUST

Through strategic engagement, compelling storytelling, and proactive media outreach, PCPC's Public Affairs and Communications Team continued to amplify industry priorities while meeting consumers' growing demand for accurate, timely information.

## CONSUMER AWARENESS CAMPAIGNS

We launched two high-impact initiatives to educate and empower consumers:

- **#WearSunscreen**, introduced on World Health Day in partnership with the Consumer Health Products Association and the Health In Hand Foundation, delivered a clear and urgent message: sunscreen saves lives.
- **Buy No Lie**, a social-first campaign, equipped consumers with tools to identify counterfeit cosmetics and personal care products, leveraging influencers, nonprofits, and government partners to amplify reach.

## PUBLIC AFFAIRS ADVOCACY CAMPAIGNS

PCPC successfully executed public affairs strategies on critical state-level

issues, including opposition to the **New York Beauty Justice Act (NY AB 2054A, SB 2057A)** and **California bill AB 728 ("Sephora's Kids")**. Through targeted outreach and coalition building, key stakeholders were informed of the potential impacts of the proposed legislation and encouraged to engage.

## STRATEGIC COMMUNICATIONS

PCPC served as a credible industry voice and issued nearly 30 public statements on key issues, including tariffs, NAMs, and federal and state legislation. Implementation of a **more proactive and integrated strategy resulted in a surge of PCPC media mentions at approximately 75% year-over-year and significant digital media growth from the previous year, including a 374% and 29% increase in followers on Instagram and LinkedIn, respectively.**

# ADVANCING *global* MARKET ACCESS

PCPC's Global Strategies Team engages U.S. and international officials to address trade barriers, advocates for the adoption of international cosmetics regulatory best practices, and works closely with trade associations worldwide to promote industry alignment and "One Global Voice" advocacy.

## TRADE

PCPC continues to lead an active advocacy effort with the U.S. Trade Representative (USTR), Department of Commerce, and congressional offices to reduce tariff and compliance burdens on the cosmetics and personal care products sector. We have filed comments on the Administration's numerous trade consultations held over the year and are advancing the following three priority areas: non-tariff barriers, Section 232 compliance relief, and trade relief for unavailable inputs. This work is closely coordinated with international cosmetic associations to ensure the industry speaks with a unified voice across markets on our priority areas.

## U.S.-MEXICO-CANADA AGREEMENT REVIEW

PCPC is leading coordinated advocacy to keep the U.S.-Mexico-Canada Agreement (USMCA) trilateral, strengthen the Cosmetics Annex, and protect the existing Rules of Origin. We engaged USTR, the Department of Commerce, the Canadian and Mexican Embassies, and submitted comments to USTR's review consultation reflecting these priorities. Our positions were fully aligned with those of Cosmetics Alliance Canada and CANIPEC, ensuring a unified North American industry voice.

PCPC also testified before the International Trade Commission to underscore the ongoing regulatory and tariff benefits the Cosmetics Annex provides to U.S. exporters. This work is increasingly important given recent Administration comments suggesting potential interest in bilateral rather than trilateral negotiations.

## AFRICA

PCPC continued efforts to support access to this growing cosmetics market by working with government and industry officials in the Sub-Saharan region to adopt global best practices.

Kenya is developing a Cosmetics Framework supporting consumer safety and small and medium-sized enterprises (SME) growth in its market. The association led a workshop with officials from the Ministries of Health and Trade, as well as from the cosmetics regulatory agencies. PCPC advocated for good regulatory practices and in-market control systems.

## EUROPEAN UNION

PCPC advocated for cosmetics and personal care product priorities during U.S.-EU trade negotiations, securing U.S. support to address key issues with the European Commission, including outdated environmental assumptions

in the EU Urban Wastewater Treatment Directive and the need to streamline the EU Cosmetic Products Regulation. In close coordination with Cosmetics Europe, both organizations presented a unified message, resulting in industry recommendations being included in the revised EU Cosmetic Products Regulation.

## CANADA

Canada is the top export market for U.S. cosmetics, with nearly \$4 billion in annual trade<sup>1</sup>. PCPC identified and addressed non-tariff barriers in the USMCA review, including duplicate requirements and fragrance allergen disclosures. Through advocacy and collaboration, PCPC secured U.S. support to eliminate Canada's requirement to disclose fragrance allergen concentrations, marking a significant regulatory win.

## INTERNATIONAL ASSOCIATION COLLABORATION

PCPC concluded its third and final year as facilitator of the International Association Collaboration (IAC) in 2025. The IAC is a global forum of over 40 international cosmetic trade associations that share information and best practices, develop common industry positions and advocacy strategies, and provide support in addressing regulatory and trade policy

issues at national and global levels.

During PCPC's tenure, the IAC achieved several important outcomes, including global e-labeling principles to support industry advocacy, a joint submission on Digital Sequence Information (DSI) to the Convention on Biodiversity, a joint industry position on the UN Plastics Treaty, and principles on reuse and refill.

## INTERNATIONAL COOPERATION ON COSMETICS REGULATION

PCPC participated in the 19th annual International Cooperation on Cosmetics Regulation (ICCR) meeting, which was co-hosted by Health Canada and Cosmetics Alliance Canada, welcoming Cape Verde, China, Egypt, Saudi Arabia, Thailand, and the United Kingdom as observer countries. New governance procedures were adopted that are expected to streamline the endorsement process for ICCR documents.

The ICCR meeting is the only global forum where cosmetics regulators and industry collaborate to promote global regulatory alignment. Joint regulator-industry working groups focused on issues ranging from best practice guidelines for next-generation risk assessments to navigating pseudoscience.



<sup>1</sup> United Nations Statistics Division. (2026). UN Comtrade Database - TradeFlow (ComtradePlus). Retrieved January 15, 2026, from <https://comtradeplus.un.org/TradeFlow>

# STRENGTHENING CONNECTIONS & MEMBER VALUE

## NEW MEMBER COMPANIES

PCPC welcomed **19 new member companies** in 2025—including e.l.f. Beauty, Suave Brands, Rion Aesthetics, Centric Software Inc., and Thompson Hine LLP—underscoring the value of our trusted advocacy, regulatory expertise, and essential resources that help members navigate complex U.S. and global regulations.

## FLAGSHIP EVENTS

**Beauty Collective Summit in Key Biscayne, Florida:** Our reimaged annual meeting brought together global leaders, trendsetters, and experts for dynamic discussions on microbiome science, biotechnology, sustainability, inclusivity, and AI's role in beauty. Highlights included keynote insights from Olympian Katie Ledecky, historian Doris Kearns Goodwin, and AI strategist Sol Rashidi.

**Legal and Regulatory Conference in New Orleans:** Addressed pressing challenges from MoCRA compliance and PFAS to greenwashing laws and global trade shifts, featuring top law firms and industry leaders.

**Science Symposium and Expo in Arlington, Virginia:** Record-breaking attendance reflected strong industry engagement, and a dynamic Expo where sponsors showcased innovative products, services, and technologies. Renowned speakers reinforced PCPC's commitment to scientific excellence and garnered expanded media coverage.

## WEBINAR PROGRAMMING

Throughout the year, PCPC delivered timely insights on topics such as Halal certification, sustainability metrics, Extended Producer Responsibility (EPR), global biodiversity rules, and digital sequencing. These sessions provided members with actionable intelligence on evolving regulatory and market trends.

# ADVANCING SUSTAINABILITY & CELEBRATING EXCELLENCE

PCPC's sustainability program reflects the beauty industry's commitment to protecting people and the planet. PCPC continued its educational programming with quarterly webinars on packaging and biodiversity, as well as discussions on design circularity and recycling. These webinars and associated resources support knowledge sharing and highlight innovative ways for member companies to integrate

sustainability into their business practices.

In September, PCPC also hosted an in-person breakfast during New York City Climate Week, featuring a moderated panel discussion on sustainability, innovation, and the evolving beauty and personal care products industry, with leaders from L'Oréal, P&G, Estée Lauder, Unilever, and Edgewell.

## MADAM C.J. WALKER AWARD

Established in 2021, the Madam C.J. Walker Award for Excellence reflects PCPC's commitment to advancing entrepreneurship, inclusivity and leadership across the beauty and personal care products industry.

Inspired by the legacy of Madam C.J. Walker, an entrepreneur and activist who built a successful hair care business in the early 1900s to address unmet needs in her community, the award honors individuals who lead by example and drive positive change. Madam C.J. Walker started her hair care business in the early 1900s to address an unmet need among

women in her community. As an activist and entrepreneur, she was relentless in her pursuit to help women feel confident and to create economic opportunity for all.

The award recognizes individuals who demonstrate a sustained commitment to entrepreneurship and inclusivity through strong leadership and meaningful engagement with consumers and communities.

In 2025, PCPC proudly presented the award to Heela Yang, Co-Founder and CEO of Sol de Janeiro, alongside A'Lelia Bundles, Madam C.J. Walker's great-great-granddaughter and family historian.

# EMPOWERING CONFIDENCE & WELL-BEING FOR CANCER PATIENTS & SURVIVORS

In 2025, the Look Good Feel Better (LGFB) Foundation strengthened its national presence through expanded in-person programming, enhanced digital education, and deeper partnerships across the beauty industry and healthcare communities. These efforts reflect the Foundation's full charitable mission, encompassing patient-centered program delivery, measurable impact, and the critical fundraising that sustains access to confidence-building support for people in cancer treatment nationwide.

## By the numbers

### PROGRAM REACH AND IMPACT

- Delivered **466 workshops** nationwide across in-person and virtual formats (20% increase over 2024), serving **4,050 patients**.
- In-person programming surged with a **45% increase in workshops and 41% higher attendance**, supported by **64% of Alliance partners now offering in-person sessions**.

### DIGITAL EDUCATION AND ONLINE SUPPORT

- **Feel Better Moments** reached **83,300 viewers** (+12%) with 14 new video tutorials.
- Online resources accessed **279,000+ times**, including a 54% increase in workshop webpage traffic.
- Social visibility grew with **1.14M Google impressions, 702K social views**, and rising engagement across all platforms.

### PATIENT SATISFACTION

- 97% would recommend LGFB; 96% felt supported; 95% reported improved self-image; 90% felt more confident in their appearance post-workshop.

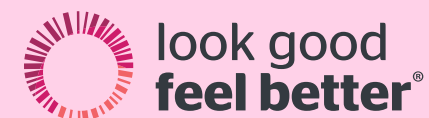
### CORPORATE AND COMMUNITY ENGAGEMENT

- **140 corporate partners and donors** contributed financial support, volunteer expertise, promotions, and in-kind resources.
- **45,000+ donated products** valued at \$1.15M for LGFB Confidence Kits.
- Expanded partnerships with **100 Alliance partner locations**, including six JCPenney salon sites, and 12 new cancer centers, with 41 more in the pipeline for 2026.
- NBCUniversal hosted a special LGFB workshop at 30 Rockefeller Plaza, reinforcing community engagement.

### BEAUTYCARES DREAMBALL

Look Good Feel Better's signature fundraising event raised **more than \$1 million** to sustain national programming and convened leaders across the beauty industry to honor commitment, partnership, and survivorship. DreamBall-related media engagement generated **148.6 million media impressions**.

Looking ahead, the Foundation will continue to expand its reach through new hospital partnerships, enhanced digital tools, and innovative community programs. With the continued support of the beauty industry and health care partners, the Foundation remains committed to ensuring that every person facing cancer treatment has access to resources that support wellbeing, dignity, and improved self-esteem.



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