

THE HIGH PRICE OF BEAUTY: Child labour in global cosmetics



Please note that pages 30-32 have been added by World Vision New Zealand and are not part of World Vision International's original report.

Authors: Michaela Cisney, Kate Shaw

Acknowledgements

Many thanks to World Vision colleagues Maxwell Amedi, Jason Amoo, Aaron Aspi, Obed Byamugisha, Niamh Cooper, Elena Gaia, Simon Lewchuk, Matthew Musgrave, Djesse Samuel, Tamara Tutnjevic and Mike Wisheart for their support in shaping this report. Thanks also to the (former) Ethical Trade Initiative Cosmetics Roundtable, Genevieve Le Baron at University of Sheffield, Fifty-Eight and members of the other companies, industry bodies, NGOs and consultancy groups who generously gave their time and input and helped to shape the direction and information in this report.

July 2023

This report is based on key findings from a desk study undertaken by World Vision in March 2019 on the risks and impacts of child labour in the cosmetics industry, and this was complimented by further desk studies in 2022 and 2023 to fully update the findings and review the impacts of the COVID-19 pandemic on child labour. The research identified ingredients in cosmetics that have a high risk of child labour in their sourcing and production, describes key efforts worldwide to prevent and reduce the prevalence of child labour in cosmetics, and highlights the policy and consumer changes that are still needed to prevent child labour in high-risk beauty and cosmetics product ingredients.

Case studies are sourced from field visits in Ghana and Uganda that took place in August 2019 and April 2023.

Cover photo: Peter, 17, and Rahmad 8 stand near the vanilla vines. Peter started working when he was 8, and with all the interruptions to his schooling, it took him until he was 15 to finish primary school. Rahmad idolises his older brother, and started working on vanilla when he was 5. © 2018 Theodore Sam / World Vision

CONTENTS

Executive Summary	4
Introduction	5
Child labour in cosmetics	6
Methodology	7
Natural Products	8
Palm oil	8
Cocoa	10
Vanilla	13
Shea	16
Mined ingredients	17
Mica	17
Copper	20
The global beauty market and corporate regulation	22
Conclusion and recommendations	25
New Zealand Imports	30
Recommendations for New Zealand	32



Executive Summary

This report focuses on six high risk ingredients,¹ used in a wide range of cosmetics and beauty products, which have known risks for involving children in their production: palm oil, cocoa, vanilla, shea, mica and copper. Millions of children are losing out on a safe and healthy childhood to work in dangerous or exploitive conditions, farming and mining essential ingredients for common cosmetics.

The global cosmetics market is made up of skincare, haircare, make-up, fragrances and toiletries — and is growing rapidly, with a projected growth of USD \$115.6 billion between 2022-2027.² The growing use of the term ‘cruelty free’ is used to confirm that a product was not tested on animals. However, this term does not necessarily mean that a brand’s supply chain is free from human rights abuses such as child labour.

The links between growers, brokers, processors, manufacturers, and companies who sell the final cosmetics products are elaborate and often difficult to trace. The first stop on the journey into your makeup bag for many ingredients is a field or a farm belonging to rural smallholders. Other ingredients can be traced to poor workers without formal employment or social protections, working on large plantations or deep in mines.

A few multi-national corporations, control the global production of cosmetics products.³ This highlights the value of increased supply chain legislation in consuming countries, in addition to increased enforcement and implementation of child labour laws in producing countries.

In 2018, we reviewed the seven largest multi-national cosmetic corporations worldwide, comprising approximately 40 percent of the total global market share).⁴ We looked to see how they were addressing the risk of child labour in their supply chains, based on the availability of six publicly available indicators:

1. statement indicating their organisational commitment or accountability to addressing child labour
2. documents outlining their standards and expectations of suppliers
3. information on their efforts to ensure staff and suppliers were aware of, and adequately trained on, supply chain risks and company policies regarding child labour

4. grievance mechanisms for workers to report violations of standards or processes to respond to reported violations of child labour or other human or labour rights
5. an audit process
6. key audit metrics or other key performance indicators for addressing child labour

Public disclosure – or lack thereof – does not necessarily provide an accurate picture of actual practices, but when reviewed again in 2022, the corporate documents seemed to indicate some progress in documentation of supplier standards, training, availability of hotlines, and audits. Much of the documentation is developed in compliance with the UK’s Modern Slavery Act and California’s Transparency Act, highlighting the importance of legislation in consumer countries to help improve supply chains. However, there is still much room for improvement. Policies ranged from detailed to vague, with a noticeable lack of clear, actionable steps or accountability metrics.

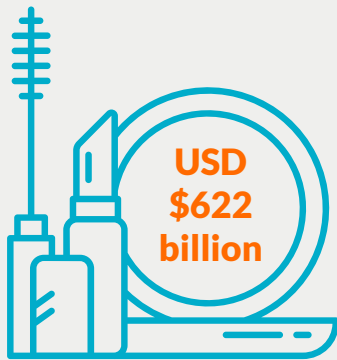
Ending child labour in the cosmetic supply chain will require an increased and coordinated effort across the production, sourcing, manufacturing, and purchasing paths of cosmetics products. The parents and caregivers of children in all areas of the world need opportunities to earn fair wages, provide for their children, and overcome poverty. Child labour will only come to an end through the concerted and collaborated efforts of governments, companies, communities, non-governmental organisations, and the general public.

In summary,

1. Governments around the world must take action to address child labour and strengthen or enact legislation to hold large corporations accountable. They should also ensure access to quality education and livelihoods to address root causes.
2. Cosmetics corporations must be unyielding with supplier standards, ensure farmers and miners are being paid a fair price and ensure sustainable solutions to any risks to human rights in their supply chains.
3. Consumers must leverage their purchasing power, choose to purchase from companies that pay fair prices to producers and that prioritise child protection standards in their supply chains. They should also apply pressure to companies that have not yet made child rights a priority.

Introduction

The global cosmetics market is growing rapidly, propelled by changing lifestyles, increasing consumer awareness, rising disposable incomes,⁵ and the role of social media and sponsored influencers.⁶ Valued at USD \$532.43 billion in 2018, the global cosmetics market experienced a rapid shrinking of 15% during the global COVID-19 pandemic in 2020, followed by a return to growth in 2021.⁷ It is expected to be worth USD \$622 billion by 2028.⁸ However, unless global and national policies are changed, corporate responsibility is increased, and consumers take action, much of the growth of the cosmetics industry could come at the expense or exploitation of children.



The global cosmetics market is expected to be worth USD \$622 billion by 2028

Natural and organic cosmetics form a rapidly growing segment of the global cosmetics market,⁹ expected to be worth USD \$54.5 billion by 2027.¹⁰ **An increasing proportion of consumers are seeking out natural and organic cosmetics, a trend that is heavily influenced by growing perceptions of toxins in synthetic ingredients and a subsequent increased demand for ingredients that are considered natural and harmless.**

The growing use of the term 'cruelty free' is used to confirm that a product was not tested on animals. In France, the numbers of consumers choosing to buy a beauty product based on natural formulations rose from 23% in 2017 to 32% in 2021.¹¹ However, this term does not necessarily mean that a brand's supply chain is free from human rights abuses such as child labour.

However, many consumers are unaware that common ingredients in everyday cosmetics can be linked to child labour. Millions of children are losing out on a safe and

healthy childhood to work in dangerous or exploitive conditions, farming and mining essential ingredients for common cosmetics.

The links between growers, brokers, processors, manufacturers, and companies who sell the final cosmetics products are elaborate and often difficult to trace. The first stop on the journey into your makeup bag for many ingredients is a field or a farm belonging to rural smallholders: farmers who grow small amounts of an agricultural commodity on the few acres they have available. Other ingredients can be traced to poor workers without formal employment or social protections, working on large plantations or deep in mines.

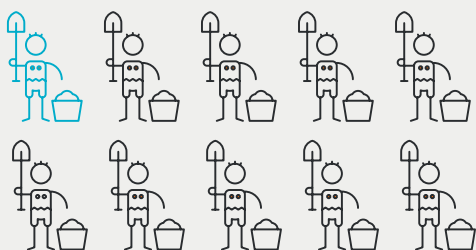
Around the world, smallholder farmers, plantation workers, and miners typically work in rural areas where infrastructure is poor and opportunities are few. In this environment, the only livelihoods available – for example, growing or mining raw materials – place farmers and their families at the mercy of brokers, processors, and manufacturers. When children's caregivers are unable to claim their right to safe, fair, and equitable working conditions and fair prices for their commodities, children are at risk of working long hours, and jeopardising their health, safety, and futures.

World Vision's global campaign, *It takes a world to end violence against children*, is committed to ending child labour and other forms of violence against children. The campaign is creating change for and with children in over 76 countries, working through advocacy for policy changes, and implementing interventions on the ground. Projects in countries like Ghana, the Philippines, and Honduras are working hard to prevent and eliminate child labour in agriculture, and offices in Canada, New Zealand and Finland are actively raising awareness and lobbying their governments to address the risk of child labour in global supply chains.

Child labour should have no place in our beauty cases. This report aims to detail the steps that can be taken to protect children in source countries of key ingredients in cosmetics, as well as the actions that countries and companies can take to ensure that the ingredients they import to formulate and manufacture cosmetics were not sourced from child labourers. Consumers also have a role to play with responsible buying, raising awareness, and lobbying their governments and favourite makeup brands to protect children worldwide.

Child labour in cosmetics

Worldwide, nearly 1 in 10 children, or 160 million children aged five to 17, are in child labour.¹² After decades of progress, the numbers of child labourers who work to support their family or have been trafficked, forced, or coerced to work has been increasing since 2016, and the COVID-19 pandemic is likely to have further increased those numbers.¹³ The vast majority of child labour is simply for survival, predominantly subsistence agriculture on family farms. But up to 26 percent of child labour is linked to global export markets.¹⁴



nearly 1 in 10 children, or 160 million children aged five to 17, are in child labour

There are three categories of 'child work': children in employment, child labour, and hazardous work. The latter is typically used to represent the worst forms of child labour, an estimated 79 million children who are engaged in tasks or jobs that jeopardise their health, safety and development.¹⁵

Child labour has several root causes, including systematic poverty, inequality, and lack of decent work for adult caregivers.

Globally, the increased demand for products grown quickly and cheaply in developing countries – including ingredients for cosmetics – contributes to high quotas and lowered production standards, which can in turn contribute to poor living and working conditions for families and child labour.

Gaps in local infrastructure, such as few or low-quality schools and families struggling to pay school fees or uniforms are also linked to child labour, as children who cannot be sent to school during the day may be taken to work with their parents. Similarly, inadequate social protection systems to help children and their families cope with droughts or economic shocks caused by events such as the COVID-19 pandemic and war in

Ukraine, as well as a lack of child protection systems to keep children safe from violence and harm, can contribute to child labour.

The COVID-19 pandemic limited access to education for almost 500 million children worldwide,¹⁶ and created economic shocks, leading the ILO and UNICEF to predict that a further nine million children may end up in child labour by the end of 2022.¹⁷ With only two years to go until leaders' global pledge to end child labour by 2025, the world is rapidly drifting in the wrong direction. Supply chains for both mined and agricultural products are often convoluted and difficult to trace, as products are imported and re-exported from multiple countries in different stages of the refinement process. Unless companies truly vet their supply chains and governments expand social safety nets and ensure that every child is enrolled in school, it is likely 140 million children will still be in child labour in 2025.¹⁸

140 million children



will still be in child labour in 2025.

This report focuses on six high risk ingredients,¹⁹ used in a wide range of cosmetics and beauty products, which have known risks for involving children in their production: palm oil, cocoa, vanilla, shea, mica and copper. We have split the discussion between agricultural and mined ingredients.



Children in employment refers to work that is not hazardous to children's health and does not interfere with their ability to go to school or to 'be a child'.



Child labour generally refers to work done by children that interferes with their education and that is physically, socially or morally harmful.



The **worst forms of child labour** includes all forms of slavery and forced labour, the use of children for prostitution, pornography or other illicit activities, and *hazardous work*: work that is likely to harm children's health, safety or morals, including work that places them at risk of being injured, maimed, or killed.

Methodology

The study is based on desk reviews and qualitative analysis: an initial scoping of secondary sources to identify high risk ingredients and countries for case studies, document analysis, and field research consisting of focus group discussions (FGDs), case studies, key informant interviews, and informal conversations and consultations with a variety of companies and industry experts in cosmetics supply chains.

Types and Sources of Data

The data used in this study was collected between the periods of March 2019 and May 2023 from secondary and primary sources. For the primary data, focus group discussions (FGDs), case studies, key informant interviews and informal conversations and consultations were used. Secondary information

was extracted from material published by UNICEF, the ILO, and other United Nations bodies, media, certification groups, sustainability experts, child labour prevention experts, policy papers, technical reports, journal articles, unpublished works, reports published by consultancy and research groups (e.g., Verisk Maplecroft, Verité, Danwatch, Mintel, Statista, Mordor Intelligence) etc. This provided background and existing knowledge on the topic.

Study Area

The study is global, although primarily focuses on raw materials (cocoa, shea, vanilla, palm oil, copper and mica) sourced in countries such as India, Indonesia, Thailand, Malaysia, Ghana, Côte d'Ivoire and Uganda, and the regulatory landscape in Europe and North America. For the most part it does not cover the production process of cosmetics, and the many steps in refinement, importing and re-exporting which have their own risks.



Seeta has never been to school. Her father passed away eight years ago, when she was six, and she has been coming to work in the mines along with her mother since then. © 2018 Theodore Sam / World Vision

Natural Products

Contrary to popular perceptions, the vast majority of child labourers can be found working in agriculture, including with many ingredients used in cosmetics. Globally, 112 million children – or 70 percent of all child labourers – work in agriculture.²⁰

Families in smallholding farms or working on large plantation quota systems often enlist the help of their children in activities that outweigh their physical capabilities, endanger their wellbeing, and interfere with their education. Some children help their parents after school, on weekends, and on holiday; however, many children – especially those in rural areas or those whose parents or caregivers are sick or injured – have dropped out of school and work long hours each day at significant risk to their health and well-being.

The trend towards natural beauty products offers cosmetics buyers an opportunity to engage in this dynamic and help address the root causes of child labour. An estimated 30 percent of ingredients in cosmetics are derived from either mined or agricultural commodities,²¹ and the growth of the natural beauty industry has seen an increased demand in agricultural inputs.

PALM OIL

Palm oil is the most widely-used vegetable oil in the world, a globally traded commodity that is used in approximately half of all consumer goods, including cosmetics. Palm oil is derived from the fruit pulp of oil palm trees grown on vast plantations, and approximately 83 percent of the world's total palm oil is produced in Indonesia and Malaysia.²² Today, the market is worth an estimated USD \$51 billion.²³

“

“I don’t go to school...I carry the sack with the loose fruit by myself but can only carry it half full. It is difficult to carry it, it is heavy. I do it in the rain as well but it is difficult... My hands hurt and my body aches.” – A 10-year-old boy who works with his father on a palm oil plantation in Indonesia (Amnesty International, The Great Palm Oil Scandal, 2016)

Children as young as five years old²⁴ work on vast palm oil plantations across Indonesia, Malaysia, Ecuador,²⁵ Sierra Leone,²⁶ Guatemala, and Colombia.²⁷ One and a half million children in Indonesia work in the agricultural sector, including on palm oil plantations, where they often labour in unsafe conditions. Because workers on the plantations are often given quotas or paid by weight, workers enlist the help of their spouse or children to meet targets, get bonuses, or avoid penalties.²⁸ Annual fires to clear land also present their own dangers.²⁹ The growth in demand for palm oil in cosmetics and grocery products since 1990 (a 900% increase in the US alone) has caused a scramble for workers, including children, forced labour and even slavery.³⁰



68%

of palm oil child workers aged nine to 17 described experiencing heat exhaustion.

A typical work day for a child on a palm oil plantation includes collecting loose palm fruits into sacks, carrying the heavy sacks (weighing an average of 10 kilograms³¹) to wheelbarrows, pushing the wheelbarrows over uneven terrain and narrow bridges to a collection point, and then beginning the process over again.³² Most children do not have protective gear, such as gloves, and often suffer cuts, scratches and abrasions; one investigation reported that 68 percent of palm oil child workers aged nine to 17 described experiencing heat exhaustion at a “heavy heat stress level”.³³ Children are also exposed to the chemicals used in palm oil production, such as the highly toxic herbicide paraquat. Although paraquat has been banned due to severe health risks,³⁴ such bans are not always respected, especially in remote and rural regions. Finally, palm oil plantations are often located in areas that are rural and remote; the difficulties in reaching these areas often means that there are no schools nearby.

In cosmetics, palm oil is pervasive, appearing in the ingredients lists of liquid eyeliners, cream foundations, shampoo, lip balm, and lipstick.



Top importers and exporters of Palm Oil (2021)³⁵



Crude palm oil

Top exporters



- **Malaysia** (\$4.9B*)
- **Indonesia** (\$2.7B)
- **Papua New Guinea** (\$709M)
- **Thailand** (\$633M)
- **Guatemala** (\$624M)
- **Colombia** (\$362M)

Top importers



- **India** (\$8.3B)
- the **Netherlands** (\$1.73B)
- **Kenya** (\$919M)
- **Spain** (\$580M)
- **Italy** (\$554M).



Palm oil or fractions simply refined

- **Indonesia**** (\$24B)
- **Malaysia** (\$9.3B)
- the **Netherlands***** (\$981M)
- **Germany** (\$359M)
- **Nepal** (\$258M).

- **China** (\$5.9B)
- **Pakistan** (\$3.3B)
- the **United States** (\$1.8B)
- **Bangladesh** (\$1.46B)
- **Russia** (\$1.3 B)

* All figures in U.S. Dollars (USD)

** Palm oil or fractions simply refined are the leading export of Indonesia.

*** European and North American exporters of palm oil, cocoa, vanilla, and shea are re-exporters, meaning that the products are exported after import, in varying degrees of processed and unprocessed, to other countries.

Changes in the market since 2018:

Crude oil exports from Malaysian and Papua New Guinea roughly doubled between 2018 and 2021, while Indonesian exports dropped sharply. Thai and Guatemalan exports also increased. The value of palm oil imported to India and Kenya has doubled, and it has increased in every importing country.

In cosmetics, palm oil is pervasive, appearing in the ingredients lists of liquid eyeliners, cream foundations, shampoo, lip balm, and lipstick. It can be difficult to identify palm oil in any given list of ingredients: there are at least 200 names of ingredients derived from palm oil including: Palmitate, Sodium Laureth Sulphate, Sodium Lauryl Sulphates, Sodium Dodecyl Sulphate, Glyceryl Stearate and Stearic Acid. Palm oil can be used in crude oil form or – more commonly in cosmetics – refined into various components through fractionation,³⁶ a process which separates the oil into a liquid (palm olein) or a solid (palm stearin). Cosmetics companies who have tried to remove palm oil from their formulations often struggle to do so entirely due to the high number of derivatives.³⁷

There are at least 200 names of ingredients derived from palm oil including:



COCOA

Behind the sweet taste and healing properties of cocoa lies a bitter story: child labour has been linked to cocoa production for decades. The world's leading producer of cocoa is Côte D'Ivoire,³⁸ a small country on the western coast of Africa that produced 2 million tonnes of cocoa in 2017–2018³⁹, followed by Ghana (900,000 tonnes). An estimated 2.1 million children work on cocoa farms in Côte D'Ivoire and Ghana alone,⁴⁰ and during COVID-19 lockdowns, researchers saw a 21% increase in child labour in Cote d'Ivoire.⁴¹ More than half of all cocoa farmers in some areas of Ghana are engaged in child labour.⁴²

An estimated 16,000 children (aged 10 to 17) in Côte D'Ivoire and Ghana have been forced into this work by someone other than their parents; some of these children may have been trafficked.⁴³ Children are also forced to work in cocoa farms in Benin, Cameroon, and Togo.⁴⁴

Cocoa is generally grown by small-scale farmers. Pay is low and the work is labour-intensive, and as a result, many families who grow cocoa cannot afford to hire adult workers. Instead, they turn to their children to make ends meet.⁴⁵ It is likely that the effects of the COVID-19 pandemic have increased the economic necessity of families enlisting their children in work; a

survey in Northern Ghana in 2021 found that 46% of cocoa families had lost income during the pandemic.⁴⁶

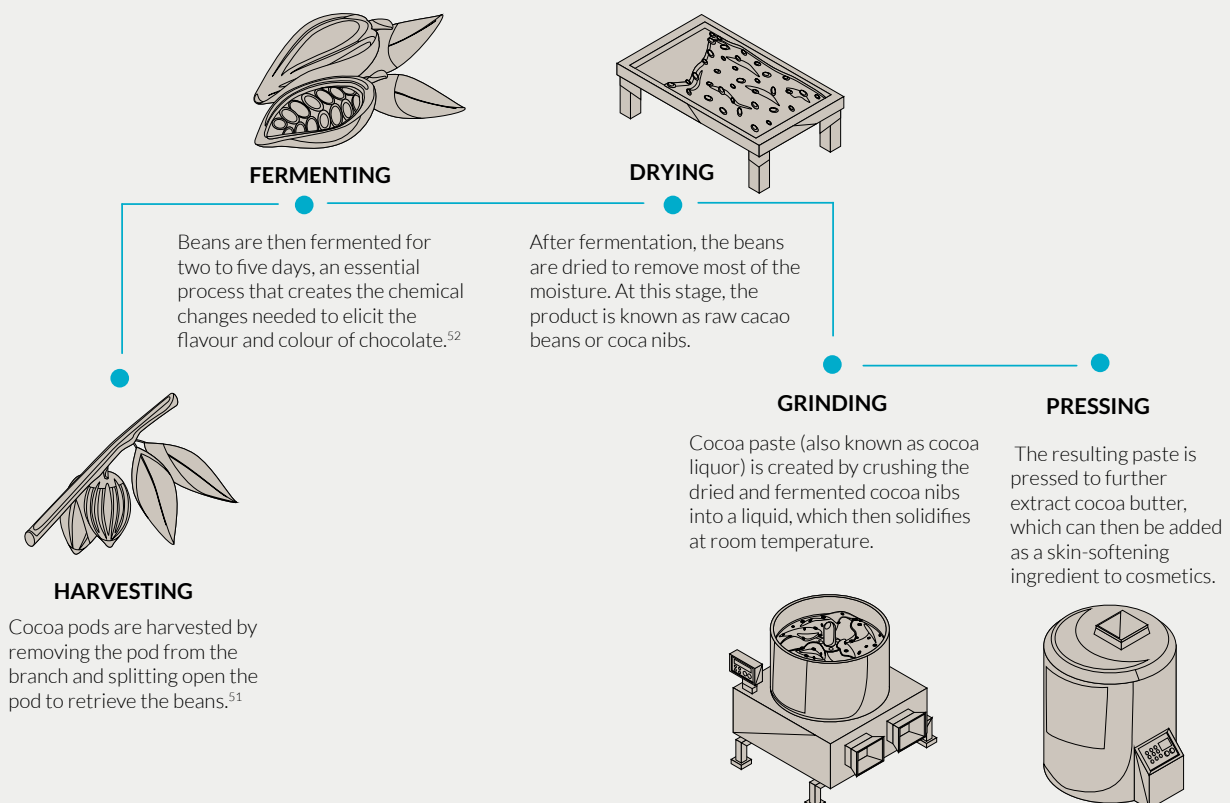
Some children take on age-appropriate work such as weeding, or carrying water or firewood after school.⁴⁷ But other children are pulled out of school during the intensive twice-yearly harvest season, and spend long work days transporting cocoa beans to and from trucks in heavy sacks. They help with spraying pesticides (with risk of inhaling toxic chemicals) and work with sharp machetes to clear the land. They work long hours, sometimes continuing after dark. As temperatures soar to 33–35° C during the hot season in West Africa, children must continue to work in the extreme heat.⁴⁸








More than 85 percent of children working in Côte D'Ivoire and Ghana are exposed to hazardous work.⁴⁹

Key actors in the global cocoa trade have long been aware of pervasive child labour in the business. In 2001, public and private stakeholders in the United States signed the Harkin-Engel Protocol⁵⁰ (also known

Cocoa production process:



Top importers and exporters of cocoa butter, beans, and paste (2021)⁵³

	Top exporters 	Top importers 
 Cocoa butter	<ul style="list-style-type: none"> the Netherlands* (\$1.46B**) <ul style="list-style-type: none"> Indonesia (\$668M) Malaysia (\$605M) Germany (\$551M) Côte d'Ivoire (\$439M). 	<ul style="list-style-type: none"> Germany (\$863M) Belgium (\$680M) the United States (\$545M) the Netherlands (\$483M) France (\$451M)
 Cocoa paste	<ul style="list-style-type: none"> the Netherlands (\$876M) Côte d'Ivoire (\$770M) Ghana (\$503M) Germany (\$348M) France (\$178M) 	<ul style="list-style-type: none"> the Netherlands (\$505M) the United States (\$406M) Belgium (\$356M) Germany (\$333M) France (\$275M).
 Cocoa beans	<ul style="list-style-type: none"> Côte d'Ivoire (\$4.3B) Ghana (\$1.8B) Ecuador (\$819M) Belgium (\$627M) Nigeria (\$564M) 	<ul style="list-style-type: none"> the Netherlands (\$1.9B) the United States (\$1.3B) Germany (\$1.2B) Malaysia (\$1.2B) Belgium (\$992M)

* European and North American exporters of palm oil, cocoa, vanilla, and shea are re-exporters, meaning that the products are exported after import, in varying degrees of processed and unprocessed, to other countries.

** All figures in U.S. Dollars (USD)

Ghana exported significantly fewer cocoa beans (but more cocoa paste) in 2021 compared to 2018, and the Netherlands imported significantly fewer.

as the Cocoa Protocol), an agreement to eliminate the worst forms of child labour from cocoa production in Côte d'Ivoire and Ghana. However, although the cocoa sector committed in 2010 to reducing child labour in cocoa production by 70 percent by 2020; none of the corporations or governments who have made this commitment are close to reaching that target.⁵⁴

Cocoa is exported in three primary forms: as cocoa beans, as cocoa paste, or as cocoa butter. Demand for cocoa paste and cocoa butter have been growing in recent years, driven partially by the increased demand for natural beauty as cosmetics companies reformulate their products to replace synthetic compounds with natural ones.⁵⁵ About 90% of the global cocoa crop ends up in chocolate confectionary products,⁵⁶ but cocoa is also increasingly used in skincare and cosmetics for its healing and skin-softening properties.



Cocoa can be found in moisturising creams, lotions, soaps, bath bombs, sugar scrubs, face masks, blush, and bronzer.⁵⁷

Many European companies are importers and re-exporters of cocoa beans and their derivatives, which highlights their responsibility to ensure their supply chains are free of child labour and other forms of labour exploitation.



Francis cradles ripe cocoa pods among his trees. The main, most labour-intensive cocoa harvest falls during the autumn months of September – February, but there's also a smaller crop each summer of new pods ready to sell to market.
©2019 Michael Hobbs/World Vision



Francis is a cocoa farmer who used to use his children's child labour, but has stopped thanks to the advice and support of World Vision child sponsorship staff. ©2019 Michael Hobbs/World Vision

Helping to earn the money for school

In Diaso, Ghana, a cocoa farmer named Francis tells us that seeing the effect child labour had on his children's education helped the family find other solutions. He's been farming cocoa since 1998, and at first, relied heavily on his children to help work on the farm.

"But through the interventions and education given to us by World Vision, I don't let my children work on the farm anymore. Now I work on the farm with my wife and also hire the services of elderly men to help."

None of Francis' three older daughters have completed school beyond the Junior High level, although the youngest, Sheila, 15, is still in school. Her older sister Mabel remembers when they used to work on the farm together.

"We used to help our father on the farm by fetching him water when it's time to spray the farm with chemicals. We also helped in the harvesting of the cocoa when they mature. We usually spent four hours or more when there were cocoa to harvest. The most difficult aspect of the farm was what we did - preparing the farm to plant the cocoa."

The family farms plantain as well as cocoa on their four-acre farm, but cocoa is their main source of income. During an average year, they can expect to harvest up to 20 bags, each weighing 62 kilos and worth about USD \$90.⁵⁸

"There are times that we struggle with the farm," Francis explains. "Sometimes we don't have money to buy chemicals to spray the cocoa when they are maturing. It has been one of our challenges when it comes to buying chemicals for insecticides and other cocoa diseases."

But for the kids, we no longer use them on the farm. Using the children on the farm affected their schooling. They missed instructional hours and thus delayed their education. My hope for my children now is to support them complete their education. So that they will get good jobs to do in future."

Mabel dropped out of school after junior high, and now that she's stopped working on the farm is hoping to open her own bakery. "Working on the farm affected my schooling," she said. "I am very happy that my brothers would not have to come work on the farm. Because my siblings don't have to work on the farm anymore, they will be able to focus on their studies, and it will help them improve and excel in future."

"I would plead with the cocoa buyers to buy the cocoa at a fair price so that our fathers can get enough money to support us."

Our child sponsorship programmes address some of the root causes of child labour in communities – increasing family incomes, improving access to schools, and helping keep children safe by strengthening child protection systems and ensuring that grownups and children alike are aware of their rights.

VANILLA

Vanilla is the second most expensive spice in the world, yet the farmers who grow it – and their children – are often trapped in an endless cycle of poverty. The vast majority of the world's vanilla is grown in Madagascar on small, family-owned farms; it is also grown in Uganda, Indonesia, Mauritius, and Papua New Guinea. In addition to its culinary uses, vanilla is widely used in cosmetics and skincare products for its antioxidant properties and fragrance.



Vanilla can be found in body lotions, lip balms, body butters, foundations, and creams.

Many vanilla farmers are trapped in poverty due to an endless cycle of debt to vanilla middlemen, who pay farmers low rates for vanilla that will be sold for high prices on the global market. During COVID-19, prices in Uganda plummeted from 200,000 Ugandan shillings (\$53 USD) to just 20,000 (\$5 USD), further exacerbating farmers' vulnerabilities. As with many other agricultural commodities, this cycle of debt and deep poverty has led to pervasive child labour in vanilla fields.

Children as young as 10 can be found helping their parents on the vanilla fields instead of attending school,⁵⁹ and farmers reported that child labour had been increasing in a 2020 assessment in Uganda.⁶⁰ The vanilla plant is native to Mexico, where it is pollinated by native bees. In East Africa, however, the absence of these bees means that each single vanilla orchid must be pollinated by hand, making vanilla a time-intensive product to grow. Children spend six to seven hours a day in the tedious work of pollinating every orchid in the field instead of going to school; they also help with the triage and drying process for vanilla pods.⁶¹ This work cannot be done after school; it must be done in late morning to be successful.⁶² This leads to high levels of truancy during the pollination period.

In Madagascar, nearly one third of the entire workforce producing vanilla is estimated to be aged 12 to 17,⁶³ with approximately 20,000 child labourers engaged in dangerous work, such as carrying heavy loads and exposure to hazardous chemicals or fertilisers.^{64, 65} During the peak vanilla campaign (May to July), school attendance drops by 30 percent in some areas.⁶⁶ A 2020 assessment for a USAID funded project with vanilla farmers in Uganda found that 12% of children in vanilla families were engaged in child labour, and 10%

of families had had a child harmed or become ill as a result of their agricultural work.⁶⁷

In some rural areas of Madagascar, it is common for the daughters of poor vanilla farmers who cannot pay back their debt to be sexually exploited by the debtors.⁶⁸ When spring arrives, poor farmers are forced to borrow money from anyone who has enough to give them a loan—not just from vanilla middlemen, but also from wealthier neighbours. The farmers use their upcoming vanilla harvest as collateral, but if the harvest does not produce as much as they need, or if their vanilla beans are stolen, the farmers are unable to pay back the loan. This traps them in a cycle of debt, further reducing their ability to send their children to school rather than help on the farm.

After vanilla is harvested, it is sold to vanilla “collectors”, who mix vanilla pods from many farmers into larger lots that are then sold to specialists who cure and dry the vanilla before selling it to exporters at market value. The vanilla is then shipped to importers, where some is processed into vanilla sugar, and then the sugar or dried beans are sold on again to distributors.



Christoph, 15, has been working on vanilla since he was six. He finished primary school last year. ©2019 Michael Hobbs/World Vision

Top importers and exporters of vanilla (2021)⁶⁹

Top exporters



Vanilla

- **Madagascar** (\$620M)
- **France** (\$71M)
- **Germany** (\$48M)
- **Indonesia** (\$40M)
- **Canada** (\$31M)

Top importers



- the **United States** (\$324M)
- **France** (\$196M)
- **Germany** (\$99M)
- **Canada** (\$70M)
- the **Netherlands** (\$56M)

* All figures are in U.S. dollars (USD)

Due to the high demand for vanilla, theft of vanilla beans just before they are ready to be harvested is a pervasive issue in Madagascar and Uganda. In Uganda, farmers are losing an average of 20% of their crop each year to theft.⁷⁰ If they, or their buyers, cannot afford guards, farmers must sleep in their gardens to guard against thieves as soon as the green pods first appear, with children helping stand guard during the day. Cases of hired guards colluding with thieves also make

farmers more likely to guard themselves with their children instead of trusting outside help. The threat of theft also drives prices down further, as some farmers decide it is better to harvest and sell green beans at a lower price instead of tempting thieves by waiting for the beans to reach full maturity. In 2017, the price of vanilla spiked, leading to a rise in theft and worsened poverty for the farmers as they rushed their beans to market, forgoing a premium on mature beans.



©2023 Lucy Stephenson-Gill

Case study: Peter in Uganda

Not far from the capital of Kampala in Uganda, vanilla flourishes around the city of Mukono and Buikwe districts. However, the high value and delicate nature of the crop has its own hidden costs, as the sons of one farmer in Ngogwe know all too well.

Peter, 17, sits with his eight-year-old brother Rahmad on the couch, as rain thunders down outside. It's a relatively prosperous house, built of cement and metal, with a tv in the living room and a balcony on the porch outside. The same investment, however, has not always been made into the boys' educations.

"I love school, but it's money from vanilla that enables me to study," Peter explains. The house and the furniture he's sitting on, even the cows outside, have all been paid for with the fruits of his labour.

"We have gained from it, we have bought cows, chairs and fixed the house."

Peter speaks lovingly of vanilla, but as a time demanding crop, it's often made it difficult for him to go to school. "When vanilla has reached its maturity, I go to school three times a week. Every flower that takes long to get harvested dies."

With all the interruptions to his schooling, it took Peter until he was 15 to finish primary school. He'd started working on the family farm when he was eight. Rahmad, sat beside him, has already started, and has been working with his older brother for three years already.

It's both a blessing and a curse that Peter and Rahmad are the skilled ones in the family, who have the knack for handling vanilla vines. "Not all of us siblings know how to handle vanilla," Peter explains. "Most of them are in boarding school. The ones that stay are the ones that have the knowledge."

In the years before COVID-19, the price for vanilla had skyrocketed, and its increased value has made it attractive to thieves. On top of the arduous and time-consuming task of caring for the vine, the boys are now trying to protect it as well.

"Vanilla can grow and then robbers come steal it," Peter tells us. "If it's harvesting time, you need to be on site all the time, night and day."

Today, things are slowly improving for the boys. The vanilla buyers have started supplying guards to vanilla farmers, sending them to help protect their valuable



The boys play with one of the family dogs in the vanilla vines.
©2019 Michael Hobbs/World Vision

crop. The boys' father, Peter Senior, has also taken note of the affect vanilla has had on his sons' educations.

"Vanilla has enabled me to take my other children to school," he says. Peter and Rahmad have stayed because he trusts them to handle the delicate crop without damaging it. But the time has come where he's ready to send them to school too.

"I have been working on it and I am making sure that the children take school seriously without being disturbed," Peter Senior tells us. "To replace their labour, I have made sure I have people who can help me and who understand this line of work."

"This garden hadn't yet started sprouting enough for me to secure a loan for the children to go to school. But since it's now showing signs, the labour will now stop and the children will start going. World Vision advises us to work hard so that we send our children to school and we are starting to realise that it's a good thing. Education for the children is a very important thing and whenever they come, World Vision talks to me about it."

SHEA

In the last decade, the global demand for shea kernels has doubled, driven in part by a growing appreciation for its cosmetic properties. Shea butter is used in a wide variety of products, including eye makeup, lotions and creams, suntan products, lipstick, and hair care. Approximately 25–35 percent of shea is traded globally;⁷¹ the Global Shea Alliance estimates that 600,000 tonnes of shea nuts are collected annually.⁷²

The majority of commercial shea nuts are sourced from West Africa, where shea trees are native and an estimated 16 million women work in picking, crushing, roasting, grinding, and cooking the shea nuts for selling.⁷³ Most shea butter is still processed manually by women and young girls using traditional methods. Shea collectors and processors in villages usually earn less than \$1.25 USD per day of work.⁷⁴



They work extremely long hours, carry heavy loads, and often suffer from back and neck pain caused by the intense physical work needed to process the shea kernels into butter.

Shea collectors report that snakes, scorpions, and bees are a serious concern, as they lack personal protective equipment (e.g. gloves and boots) and use their bare hands and feet to search for shea kernels in the bush. One NGO working in the shea industry estimates that 30,000 women a year suffer snake bites in Ghana while collecting shea.⁷⁵

As with other agricultural commodities in poor countries, children sometimes work with their



©2023 Onasis Gaisie/World Vision



©2023 Onasis Gaisie/World Vision

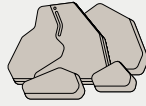
mothers⁷⁶ to produce shea and children face all of the same risks as their mothers when collecting shea kernels: working extremely long hours, carrying heavy loads, and suffering from injuries as they gather the kernels without protective gear.⁷⁷ While child labour has been reported in shea production,⁷⁸ there have been relatively few investigations. One study in several West African countries, commissioned in 2004 by an international shea buyer, found that 60 percent of women collected shea with family members, usually their daughters. The children were still able to attend school where it was available,⁷⁹ but the heavy loads and dangerous tasks demanded of shea production very likely constitute hazardous work.

The demand for natural cosmetics has in recent years seen a raft of direct-traded shea products marketed for their ability to empower communities of women. When paid a fair price, women-led shea cooperatives can be an important source of livelihoods for local communities.⁸⁰ However, the relative lack of published investigations into child involvement in collecting and processing shea – especially in poor agricultural communities where children may be at higher risk – highlights the need for additional research and awareness by companies and consumers. Cosmetics companies must carefully examine their shea supply chains, ensuring that women who collect and process shea are compensated fairly so that their children do not need to engage in hazardous work.⁸¹

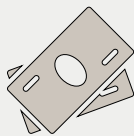
Mined ingredients



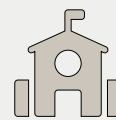
Informal mining in areas with weak government oversight or provision of basic services is more likely to lead to increased risk of child labour.



Payment by weight or piece increases the pressure for every member of the family, including the children, to contribute to the mining efforts.



Families struggling to earn enough money to support themselves often travel to mine sites far away from schools and other services.



In cases where there is a school nearby, hidden costs (such as uniforms, lunches, etc) and opportunity costs still persist.

MICA

In recent years, the link between mica used in cosmetics and the particularly dangerous forms of child labour behind its production have become widely known.⁸² Mica is a common ingredient for a diverse range of cosmetics products, as it adds sparkle to highlighter and blush, eye shadows, lipsticks, and nail polishes. Any product that shimmers likely contains mica, which can be either natural (mined) or synthetic. In addition to shine, mica also serves as an anti-caking agent in powdered cosmetics, such as foundation and blush. Beyond cosmetics, it is widely used in household products such as ink, paint, and electronics.



A 2016 report found mica in 100 percent of the blush and bronzers that they sampled, 60 percent of foundations and lipsticks, and 40 percent of mascaras.⁸³

Mica is mined in various countries, including Brazil, Canada, China, Madagascar, Pakistan, Sri Lanka and the United States. However, 25 percent of the total mica in use around the world is sourced from just two states in India: Jharkhand and Bihar. Mica from these states is considered higher grade and perfect for providing the pearly sheen in cosmetics products. In these two states, more than 22,000 children, some as young as five years old, work in small mines with their family members, who often have no other source of income.⁸⁴ School closures and the mass migration

from cities to home villages during the COVID-19 lockdown in India in 2020 reportedly increased the numbers of children and families turning to mica for their survival.⁸⁵

Mica mining is incredibly dangerous for children; the risks they face include broken bones and severe injuries in accidents, death from exhaustion and heatstroke, and a type of lung disease known as silicosis, which is caused by inhaling quartz or silica dust that causes lung inflammation and scarring. Many children work in mine shafts up to 300 metres deep. These shafts are known to collapse; a 2016 investigation found that seven children had died in just two months from working in unsafe mines that collapsed.⁸⁶ In June of that same year, a local child protection agency in India reported that 20 children had died in a single month in different accidents and mine shaft collapses.⁸⁷

Only 10 percent of Indian mica mines are legal after a mass shutdown in 1980 due to anti-deforestation laws. However, the increasing demand for high quality mica for natural cosmetics, cars and electronics has led to the development of a vast black market for mica from the remaining 90 percent of mines. Given their illegal nature, they are not regulated and working conditions are dangerous, often without any safety measures.⁸⁸

Raising awareness of the high cost of mica mining in India has seen an increase in companies producing synthetic mica (now accounting for 10 percent of the global market)⁸⁹ and in sourcing mica from other countries, especially Madagascar, where the product

Top importers and exporters of mica (2021)⁹⁰

Top exporters



Mica*

- the **Netherlands** (\$111M**)
- **India** (\$71M)
- **China** (\$57M)
- **Madagascar** (\$11M)
- the **United States** (\$11M)

Top importers

- **China** (\$86M)
- **Japan** (\$40M)
- **Germany** (\$23M)
- the **Netherlands** (\$18M)
- the **United States** (\$17M)

* Mica is both used in sheet form (predominately in the electric and electronic industries) and scrap form (including mica flakes and powder, for the pigment sector to be used in paints and coatings, construction and cosmetics). Although import/export data is available for the mica powder subcategory – and this is the grade of mica most relevant to the cosmetic industry – we include here total mica since additional mica powder is a byproduct of sheet mica processing.

** All figures in U.S. Dollars (USD)

costs far less. However, refusing to source mica from India, or at all, only leaves incredibly impoverished communities more vulnerable, and likely to turn to even more negative coping mechanisms to survive.

The best thing that companies can do is engage with communities, pay a fair price to communities so they can afford to send their children to school, and lobby government to regulate the sector, bringing in safety standards, and ensure children and families have access to schools and health care.

In India, mica mine “operators” buy raw slabs of mica from the individuals who collect it from small mines. The mica is then sold to a trader, who sells it to a processor, who sells it to an exporter. Mica mined by villagers, including children, is sold for a rate of 10 rupees (about \$0.15) per 1 kilogram of mica. However, when World Vision spoke to communities at work in a mine in Bihar, none of the villagers knew how much mica is eventually sold for. In 2018, the U.S. price for one metric tonne of dry ground mica was 330 U.S. dollars, the equivalent of \$0.33 per kg, or more than double what the families receive.⁹¹



“If I can, I would definitely go to school. But I have to work here to earn,” says ten-year old Pavan, as he cracks a chunk of earth using his spade and pulls it down. ©2018 Theodore Sam / World Vision



The little children seem to be collecting mica like it is playtime for them. It is only a matter of time before they get into working in the mines as full-time labourers. ©2018 Theodore Sam / World Vision

Bihar, India

Deep in the forests reserve of Bihar state, six-year-old Roshni and her little brother Kamal, age 4, sit at the mouth of a cave picking tiny flakes of mica into a bowl. Their mother and father, Karan and Devi, are working deep inside the cave in a squatted position, collecting flakes of mica into a cane basket.

The cave is about six feet high and three feet wide at its mouth, and becomes smaller and narrower as it deepens, with barely enough height at the end to kneel. The cave is pitch dark except for the light from Karan and Devi's torches. While one hand holds the torch, the other hand digs into the rocky, slushy earth in search of chunks of mica and rocks. They each toss a handful of rocks, mud, and mica into the cane basket, swiftly separate the rocks from the mica, and bury their hands into the earth to repeat the process. On an average day, the family collects 40 to 50 kilograms of mica. This amount, collected during a 12-hour day of working by Karan, Devi, Roshni and Kamal, will be sold for about \$6.54.

This mine in Bihar is illegal, but it will continue to operate for as long as there is mica to be found. Before India's Forest Conservation Act of 1980 was legislated to limit deforestation, there were over 700 mines in Bihar with more than 20,000 workers. Now, there are only 38 official mica mines in Bihar. All other mines, including the one where Roshni and Kamal work with their parents, are illegal. These mines are generally in remote parts of the state and are controlled by an independent mine operator. The mine operator identifies old mines and breaks them open using heavy equipment. Once the mine is open, the mica

must be collected using bare hands rather than large machinery: if mica breaks into smaller pieces during the collection, it loses market value.

The mine operators employ people from nearby villages and communities. There are no alternate livelihood options in this area, and so, unless they wish to migrate to bigger cities in search of work, mica mining is their only option. At one point, Karan did migrate to Bangalore (over 2100 km away) to work as a daily wage labourer in the plastic scrap industry, but he soon returned home. "I couldn't afford to take care of my expenses there and save enough to send money home as well. It was very difficult," he says.

Now, Karan and Devi have left their two older children, Raj (8) and Shanthi (10), with their grandmother in the village, more than 30 km away from the mine. To reach the mine, Karan, Devi, Roshni and Kamal walk for three to four hours through hilly forests. Like other families from their village, they live in a makeshift hut near to the mine.

"If we don't stay in the forest, we have to spend three hours to come here and three hours to go back every single day," says Devi, as she puts little Kamal to sleep and prepares a simple meal. "We won't be able to collect enough mica to make enough money for the day. So, this is our only option." They will continue to stay until the mines are completely empty. Neither Devi nor her husband have ever been to school. "I want my children to be educated; that is why I have put Raj and Shanti in school. But I can't afford to send all four of them to school," says Devi.

"I don't want my children to go through life like me. I want them to make something of their lives...anything but this mica."

COPPER

Although incredibly important for use in electronics and engineering, there has been an explosion in the use of copper derivatives in high-tech serums and other skincare products in recent years, thanks to its skin healing and plumping properties. Cosmetics only make up a very small percentage of overall copper use worldwide, but there is mined material in popular ingredients like copper sulphates, copper gluconate⁹² and copper peptides.⁹³

Chile mined the most copper worldwide in 2022, with Peru and the Democratic Republic of Congo (DRC) tied for second place.⁹⁴ In addition to being a large producer of copper, the DRC also has a large problem with child labour; it's estimated that four in 10 miners in DRC are under the age of 18.⁹⁵ Copper production has steadily increased in DRC in recent years,⁹⁶ due in part to its close links to cobalt, an essential component for rechargeable batteries⁹⁷ that primarily comes from the DRC.⁹⁸

Child miners are generally poorer and less likely to be in school than their peers.⁹⁹ Copper mines in DRC are concentrated in Haut Katanga and Lualaba provinces, where there has been increasing activity by

armed groups in recent years, and where 72% of the population lives below the poverty line.¹⁰⁰ Children might work up to 12 hours and earn just USD \$2 per day¹⁰¹ as low paid washers or sorters.

High levels of corruption in DRC and patchy mining sector regulation split between artisanal and industrial mines means this is an area where the state struggles to assert its authority.

World Vision and other organisations have consistently worked with local and national governments in DRC to fight against child labour. Recent achievements include the government allocating an operating budget for the National committee to fight the worst forms of child labour, a decade after it was created in 2011, and enforcing an element of the 2008 mining legislation which requires allocating at least 0.3% of turnover to community development projects in the mining sector.

However, there was an increase in child labour at the mines during COVID-19, as decreased prices for artisanal miners drove even more children out of schools and into the mines.¹⁰² In some areas of Katanga in 2021, only 50% children aged 5-17 were in school,¹⁰³ although over 90% say they would like to go.¹⁰⁴ Despite protective legislation, the fight against child labour in mines in DRC continues. The split between artisanal and industrial mining regulation can also be artificial, studies have found that industrial mines can become 'artisanal' after hours when local workers bribe security guards for access.¹⁰⁵ Copper that has been mined one way can also be mixed and sold with copper that has been mined under other regulations.¹⁰⁶






In general, risks are higher in the informal artisanal mining sector where children are vulnerable to abuse and exploitation by armed guards and mine owners, as well as significant immediate and long-term adverse impacts on their health.¹⁰⁷ Tunnels are often hand dug, poorly supported, and badly ventilated – deaths due to mine collapses, and 'hard metal lung disease' are well documented.¹⁰⁸ Copper is mined in the form of heterogenite, a compound that includes cobalt, which is toxic to touch and breathe, as well as radioactive uranium.¹⁰⁹ In 2019, a landmark human rights case was filed in the United States, attempting to hold major technology companies such as Apple, Tesla and Microsoft responsible for the deaths of children working in mines in the DRC.¹¹⁰

Perhaps more than any of the other industries¹¹¹ mentioned, discussions with mining consultants indicate there is very low traceability in the industry



A girl collects pieces of copper raw material in the Kambove quarry. ©2011 Alain Mwakw / World Vision

Top importers and exporters of copper ore, sulphates, and oxides (2021)¹¹¹

	Top exporters 	Top importers 
 Copper ore	<ul style="list-style-type: none"> • Chile (\$27B) • Peru (\$15B) • Australia (\$5.8B) • Indonesia (\$5.4B) • Canada (\$4B) 	<ul style="list-style-type: none"> • China (\$57B) • Japan (\$13B) • Korea (\$6B) • Germany (\$3B) • Spain (\$2.7B)
 Copper sulphates	<ul style="list-style-type: none"> • South Africa (\$576M) • the Russian Federation (\$128M) • Taipei (\$113M) • Mexico (\$77M) • the United States (\$66M) 	<ul style="list-style-type: none"> • the United States (\$119M) • Australia (\$84M) • Canada (\$44M) • Indonesia (\$34M) • Germany (\$24M)
 Copper oxides and hydroxides	<ul style="list-style-type: none"> • the United States (\$193M) • Taipei (\$74M) • Australia (\$73M) • Germany (\$46M) • Vietnam (\$38M) 	<ul style="list-style-type: none"> • China (\$62M) • Korea (\$51M) • Taipei (\$35M) • the United Kingdom (\$32M) • the United States (\$31M)

* All figures in U.S. Dollars (USD)

**Copper oxides/hydroxides is a precursor to copper gluconate, which does not have a harmonized code



- Once mined, families pass their bags of heterogenite to 'négociants' to transport to a 'depot' to sell.



- Negotiants keep up to half the money paid by depots.



- The depots then sell on to industrial companies, whose trucks buy from depots along the journey between industrial mines and initial processing centres in Kolwezi, Likasi or Lubumbashi.¹¹²

between source mines and even countries, despite a growing number of schemes and multinational efforts.

At that point, copper has been mixed from a wide range of sources, both artisanal and industrial. It will then be exported, and processed in a multitude of countries, before being refined into ingredients like copper

sulphates or copper oxides, from which the copper can be further refined into an ingredient in a beauty product. As copper is blended in the refining process, this means guaranteed child labour free copper is almost impossible; it is essential to clean up the sector as a whole.

In response to public pressure, Western technology manufacturers and end users that rely on these minerals are leading processes and change that support more responsible mining activity, especially as it relates to conflict and forced and child labour. [Apple's 2018 Supplier Standard](#) is a good example of this, however there is some concern that such efforts simply push accountability further down the supply chain, without improving the situation for the children and families labouring.

Like with the other ingredients discussed in this report, current global sourcing and supply chain practices can compound the issues facing the people of the DRC. However, if improved, demand for these natural ingredients presents an opportunity to support better governance, economic development nationally and locally, and local livelihoods.

The global beauty market and corporate regulation

The global cosmetics market is made up of skincare, haircare, make-up, fragrances and toiletries — and is growing rapidly, with a projected value of USD \$622 by 2028.¹¹³ A few multi-national corporations, mostly European and North American, control the global production of cosmetics products,¹¹⁴ with East Asian countries and companies playing an increasing role. Major buying regions including California, Canada, Germany and the UK have all passed transparency legislation aimed at company supply chains in recent years, which have helped improve documentation of company policies to combat and address child labour. However, research shows that documentation and supply chain legislation must be combined with holding companies to account, and increased enforcement and implementation of child labour laws in producing countries.¹¹⁵

Cosmetic IMPORTS 2021 ^{*116}			
	2021	Global share	annual growth value 2017-2021
World	\$75 billion	100%	10%
China**	\$31 billion	41%	36%***
USA	\$5.6 billion	7%	1%
Singapore	\$3.1 billion	4%	7%
Germany	\$2.7 billion	4%	-1%
United Kingdom	\$2.1 billion	3%	-6%
France	\$1.9 billion	3%	0%
Canada	\$1.6 billion	2%	-2%
Japan	\$1.5 billion	2%	4%
Belgium	\$1.4 billion	2%	4%
Netherlands	\$1.3 billion	2%	7%
*in U.S. dollars; includes beauty or make-up preparations, skincare preparations (including sunscreen or suntan preparations; excluding medical treatments), and manicure or pedicure preparations			
** includes Hong Kong and Macau territory imports			
***Growth for mainland China only; Hong Kong was 16% during the period, and Macau 74%			

Cosmetic EXPORTS 2021 ^{*117}			
	2021	Global share	annual growth value 2017-2021
World	\$71 billion	100%	8%
France	\$10.8 billion	15%	4%
Republic of Korea	\$7.7 billion	11%	17%
China**	\$7 billion	10%	25%***
Singapore	\$6.6 billion	9%	14%
Japan	\$6.2 billion	9%	23%
United States	\$5.5 billion	8%	-1%
Germany	\$4 billion	6%	2%
United Kingdom	\$2.4 billion	3%	1%
Italy	\$2.3 billion	3%	0%
Poland	\$2.2 billion	3%	11%
*in U.S. dollars; includes beauty or make-up preparations, skincare preparations (including sunscreen or suntan preparations; excluding medical treatments), and manicure or pedicure preparations			
**includes Hong Kong			
***growth for Hong Kong only, mainland China was 3.5%			

In 2018, we reviewed the seven largest multi-national cosmetic corporations worldwide, representing a total of 182 cosmetics brands and comprising approximately 40 percent of the total global market share.¹¹⁸ We looked to see how they were addressing the risk of child labour in their supply chains, using a simplified version of publicly available indicators used in well-known benchmarks like Know the Chain¹¹⁹ and the Corporate Human Rights Benchmark.¹²⁰ The six indicators we looked for were:

-  statement indicating their organisational commitment or accountability to addressing child labour
-  documents outlining their standards and expectations of suppliers
-  information on their efforts to ensure staff and suppliers were aware of, and adequately trained on, supply chain risks and company policies regarding child labour
-  grievance mechanisms, including hotlines, for workers to report violations of standards or processes to respond to reported violations of child labour or other human or labour rights
-  an audit process
-  key audit metrics or other key performance indicators for addressing child labour

Public disclosure of these indicators is generally what has been required by the UK and Australia's Modern Slavery Acts, so it is perhaps unsurprising that when reviewed again in 2022, the corporate documents showed some progress in documentation of supplier standards, training, availability of hotlines, and audits. Three companies in particular had significantly improved their documentation and in all but one category, a majority of companies were publishing documentation for these six evaluation criteria. Three companies specifically mentioned responsible sourcing of palm oil, two of mica, and one of shea in their corporate statements.

However documentation – or lack thereof – does not necessarily reflect practices at the end of the chain, and there is still much room for improvement. Cosmetics conglomerates' policies ranged from detailed to vague, with a noticeable lack of clear, actionable steps or accountability metrics.

One reason to be suspicious of the progress in documentation is the challenge for companies to enforce their supplier codes of conduct.¹²¹ A result of using transparency legislation to push corporations to change has been a reliance on third party and social audit schemes.¹²² These outsource some of the responsibility for monitoring the supply chain and, findings show, are easily evaded. Pre-announced audits make it easy to hide children and clean up labour practices temporarily, with workers motivated to participate in the show out of fear they may otherwise lose their jobs. It is less likely for auditors to identify any issues when budgets are small or auditors are paid by the companies they audit, both of which are common occurrences in today's system.¹²³



Only one of the seven companies (14%) in our review had any public evidence of the audit metrics that they use – making it the only indicator that showed no improvement since 2018.

Two new companies which have entered the top seven in the past four years were also evaluated, and while they did provide vague information for all of the other indicators, they did not provide any details of audit metrics. Because companies are not required to publish the results of their audits, it is difficult to assess the quality of these efforts, and whether they are making a difference. When we asked vanilla farmers and a local buyer in Uganda whether the buyers who bought from them had ever asked about child labour, they laughed. "No," they said. "Only theft."¹²⁴

Top national cosmetics markets worldwide in 2018, based on revenue (in U.S. dollars)¹²⁵

	Per cent of global market	Revenue in 2018 (in U.S. dollars)
United States	18.3 per cent	89.5 billion
China	12.7 per cent	62 billion
Japan	7.7 per cent	37.5 billion
Brazil	6.2 per cent	30.0 billion
Germany	4.1 per cent	20.2 billion
United Kingdom	3.6 per cent	17.4 billion
France	3.1 per cent	15.3 billion
India	2.9 per cent	14.1 billion
Republic of Korea	2.8 per cent	13.5 billion
Italy	2.4 per cent	11.8 billion

Children are working in unsafe and dangerous conditions around the world to provide palm oil, cocoa, mica, copper, vanilla, shea and other ingredients to the cosmetics industry. Many large corporations have taken the first step of publicly committing to end child labour. However, fewer have gone beyond initial statements to publishing

and following up on long-term actions to effectively reduce and prevent child labour in their supply chains. Corporations must empower local communities and suppliers, and focus on improving children's lives rather than a system of tests and penalties¹²⁶ in order to protect the human rights of the communities that produce their key commodities.



Pavan, his eight-year-old brother Kumar and their mother immediately get busy digging through the rubble to pick mica flakes. ©2018 Theodore Sam / World Vision

Conclusion and recommendations

The projected global growth of the cosmetics sector in the next few years must not come at the cost of a child's education, health, or life.

Ending child labour in the cosmetic supply chain will require an increased and coordinated effort across the production, sourcing, manufacturing, and purchasing paths of cosmetics products. The parents and caregivers of children in all areas of the world need opportunities to earn fair wages, provide for

their children, and overcome poverty. Child labour will only come to an end through the concerted and collaborated efforts of governments, companies, communities, non-governmental organisations, and the general public.

This section of the report outlines the recommended actions that key actors in each sector can take to protect children from forced or unsafe work in the production of cosmetics ingredients.

World Vision's approach to child labour

Just as the causes of child labour - poverty, inequality, harmful social norms and practices, lack of access to relevant and quality education, inadequate social protection systems, factors such as conflict and displacement, and the demand for cheap, disposable labour - are varied and multi-faceted, so too are World Vision's responses.

World Vision is working to end child labour through projects which directly benefit children, as well as national and global-level advocacy. Our child sponsorship programmes help combat child labour by teaching children and communities about their rights, encouraging school enrolment, and helping families increase their incomes. We're also partnering with a range of companies and governments to prevent child labour in areas where it's especially common, such as the production of certain agricultural products or manufacturing.

World Vision uses a systems approach to address the root causes of child labour and other forms of violence against girls and boys, empowering key actors to work together to create a protective environment that cares for and supports all children, especially the most vulnerable. To do this, we're empowering girls and boys to be advocates for their own safety and protection, strengthening families, partnering with communities (including faith communities) to promote positive norms, and influencing governments for improved implementation of laws and standards they have committed to abide by.



Christoph and Peter pull out their schoolbooks to study. Both boys have been splitting their time between school and vanilla for the past nine years, and only recently finished primary school. Neither has yet managed to begin secondary education, but their father is determined to find trustworthy help to replace the boys' labour so their educations' will no longer be impacted, thanks to World Vision messages in the community. ©2019 Michael Hobbs/World Vision

Government recommendations

Reducing and preventing child labour is a key issue in today's ever-expanding global economy. Despite the Sustainable Development Goal 8.7's aspiration of ending child labour by 2025, at the current rate, 140 million children will still be in child labour in 2025, almost 20 million more than were predicted in 2016.¹²⁷ Governments have a clear responsibility to use their power to protect children, whether in countries where at-risk ingredients are sourced or in countries that import, manufacture and sell.

Many multi-national cosmetics corporations that have publicly available statements indicating their commitment or accountability to addressing child labour made these statements only recently, under pressure to be compliant with Germany's new Supply Chain Due Diligence Act,¹²⁸ the United Kingdom's 2015 Modern Slavery Act¹²⁹ or California's 2010 Transparency Act.¹³⁰ This highlights the powerful role of government policy and legislation to hold corporations accountable to end child labour, but as discussed in an earlier section, is not necessarily enough on its own.

World Vision calls on all governments to help end child labour in all its forms by taking the following actions:

1. Adopt strong national laws and policies to eliminate child labour, in line with international standards. (Sustainable Development Goal 8.7).

This includes: ratifying ILO convention no. 182 on the Worst Forms of Child Labour and 138 on the Minimum Age for Admission to Employment, and crafting national legislation that is aligned to these standards; ratification and implementation of the UN *Convention on the Rights of the Child* and its three optional protocols; allocating adequate financial and human resources for the implementation, monitoring, and enforcement of laws; and raising awareness among citizens about the implications of child and labour rights in their everyday lives.



Key resource: Summary of current international treaties and conventions, published by Stop Child Labour (<https://stopchildlabour.org/international-treaties-and-agreements/>)¹³¹

As part of World Vision's campaign *It takes a world to end violence against children*, World Vision has pledged to contribute to fulfil target 8.7 of the Sustainable Development Goals to end child labour by 2025 - and contribute to the achievement of related targets on ending violence against children - by increasing programming and advocacy resources to end all forms of violence against children, including child labour, and strengthening child protection systems in at least 70 countries.

2. **Invest in free, quality education for all children to at least 15 years of age (SDG 4)** with consistency between the age for compulsory education and the legal minimum age for employment, apprenticeship, and work training. This includes supporting and scaling up efforts to improve access to education for all girls and boys; providing specially tailored transitional education programmes and learning support for working children; and supporting skills training and decent work for youth, including opportunities that are flexible and relevant to out of school children.



Key resource: ILO's 2017 policy recommendations to address child labour (https://www.ilo.org/wcmsp5/groups/public/@dgreports/@dcomm/documents/publication/wcms_575499.pdf)

3. **Strengthen labour market and corporate responsibility** policies to create an enabling environment for the elimination of child labour, including in global supply chains. This includes:
 - Promoting and supporting **supply chain due diligence and transparency** initiatives where they do not already exist, requiring businesses to report and take action on their efforts to prevent child labour and other forms of human exploitation.
 - **Improve audit practices** and ensure that existing transparency legislation does not simply allow large multinationals to push responsibility further down the chain.
 - Develop, together with civil society and other stakeholders, **national action plans on business and human rights** that, as a central feature, promote the rights of children to be protected from child labour and other forms of economic exploitation, in line with the *UN Guiding Principles on Business and Human Rights*¹³² and the *Children's Rights and Business Principles*¹³³.

Corporate recommendations

In recent years, cosmetics brands have increasingly reacted to consumer concerns around animal testing or environmental damage. However, there has been no similar outcry over child labour. The recent shift to more natural ingredients in cosmetics represents a significant opportunity to create sustainable livelihoods and improve conditions for farming and mining families around the world. If companies do not improve their supply chain practices, however, this shift to more natural ingredients has the potential to harm, not help, children's futures.

The cosmetics market is becoming increasingly saturated,¹³⁴ offering an opportunity for brands to distinguish themselves from competitors. As consumer awareness of child labour issues in cosmetics continues to rise, taking public steps to prevent child labour and protect children in supply chains is a vital opportunity for cosmetic corporations to rise above the competition and take a stance as global leaders. World Vision calls on the corporate sector to:

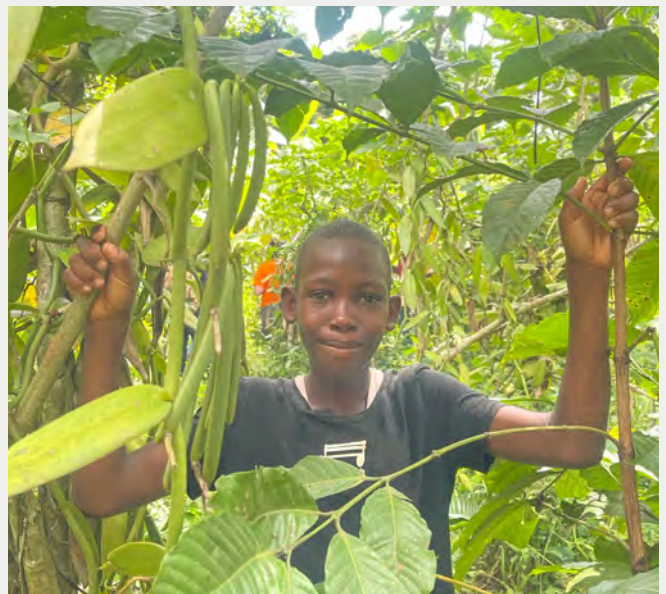
- 1. Adopt and operationalise widely recognised norms** on responsible business practices such as the [UN Guiding Principles on Business and Human Rights](#) and the [Children's Rights and Business Principles](#), and implement robust policies and due diligence procedures to identify, prevent, mitigate, and account for how potential adverse impacts – including child labour – are addressed in their operations and supply chains.
 - Clearly outline expectations for your suppliers through defined codes of conduct and certifications
 - Regularly assess your supply chains to determine the presence of child labour and other potential adverse human rights impacts
 - Regularly train staff and suppliers on monitoring for child labour and implementing standards
 - Introduce formal mechanisms for workers – at all levels of the supply chain, including those who work in agriculture or mining – to report labour exploitation and other human rights violations
 - Invest in thorough audit practices and provide remedies and support (not penalties) for cases of child labour and other human rights violations found in the supply chain
 - Ensure you are focusing on risks of child labour in raw material production as discussed in this report, not just in manufacturing
 - Engage with global schemes such as OECD and <https://www.itsci.org>

Importance of addressing root causes

Current corporate social reporting activities often centre around auditing and verification schemes. Three of the top seven multi-national cosmetics corporations assessed in this report mentioned that in instances of known child labour, they will terminate the relationship with the supplier and/or dismiss the child worker.

However, auditing practices and the adoption of zero tolerance policies for child labour in supply chains alone are not adequate. In many cases, they simply backfire, as child labour is hidden from auditors or children resort to even more dangerous coping mechanisms to earn a living for themselves and their families. Planned audits can often be circumvented, and The Cocoa Barometer 2018 Report found that even random audits on cocoa plantations have in some cases resulted in a counter-productive effect, causing child labour to be hidden but not reduced.

There is a strong need for a holistic approach to the issue, in partnership with different stakeholders including civil society organisations. Such an approach should address the root causes of farmer poverty, absence of or lack of access to high-quality schools, poor local infrastructure, and awareness of the impacts of child labour. In all cases of interventions or remediation, the best interests of the child must be maintained as the top priority.



©2023 Masna Gurung

2. Clearly and publicly disclose the steps taken to address the risk of child labour and promote decent work in supply chains, in an effort towards transparency, accountability, and distinguishing your brands from those of competitors. Without doing so, consumers, campaigners and other interested stakeholders have no way of knowing what – if anything – companies are doing to prevent child labour, and constructive dialogue is next to impossible.

- Make public commitments to ensuring a child labour free supply chain for your company; be specific and clear in your action and follow-up plans and how you will report regularly on progress

3. Engage in dialogue and collaborative action with stakeholders such as affected/sourcing communities, consumers, NGOs, investors and other companies to address child labour.

- Support education and development efforts in the areas where you source key ingredients. Increased investment in local communities can improve livelihoods and access to education, and help eliminate some of the factors that push families towards child labour.
- Publish and encourage open dialogue with consumers, highlighting progress that has been achieved

4. Pay a fair price for raw materials. Businesses active throughout the supply chains of cosmetics ingredients should commit to paying a living wage (the cost for an average household to maintain a decent standard of living) and ensure transparency regarding their pricing policies. This is especially important when implementing due diligence and oversight; recent studies have shown that these costs are often passed on to buyers, who then pay producers even less for their products, creating a further push towards child labour.¹³⁵

Investing in the community*

A palm oil company operating in North Sumatra, Indonesia, provides scholarships for children whose average grades are 85 percent or higher at the end of each semester, starting in the elementary grades. Education at that level is free, but parents can use the scholarships to pay for uniforms and other school-related expenses for their children. There is no limit to the number of scholarships available; if all children scored 85 percent or higher in a semester, all children would receive a scholarship.

*UNICEF. *Palm Oil and Children*. https://www.unicef.org/indonesia/Palm_Oil_and_Children_in_Indonesia.pdf



Theophilus, 6, Charles, 8, and Mordecai, 10 are growing up in a coca community in central Ghana. Their father Francis used to have the boys' older siblings work on the farm with him. "But through the interventions and education given to us by World Vision, I don't let my children work on the farm anymore," Francis tells us. ©2019 Michael Hobbs/World Vision

Consumer recommendations

It is unacceptable that 160 million children are still working in unsafe conditions and missing out on an education today. Many of these children could be working in the supply chains of the most well-known cosmetics brands. Children around the world urgently need increased protection and opportunities to fulfil their rights to a safe and free childhood.

Consumers should make a positive difference by :

- 1. Share your knowledge** – Tell your friends and family what you know about the risks of child labour in cosmetics, and share information on social media.

Key points:

- Nearly 1 in 10 children worldwide work to support their family or have been trafficked, forced, or coerced to work. Of these, almost 70 percent work in agriculture.
- An estimated 30 percent of ingredients in cosmetics are derived from either mined or agricultural commodities.
- Palm oil, cocoa, mica, vanilla and copper are some of the ingredients most likely to have involved child labour.
- Natural cosmetics may avoid synthetics and animal testing but can have a higher risk of child labour, as many agriculturally-sourced (i.e., natural or plant-based) ingredients are grown and harvested in poor areas where children work to support their families. When farmers and miners are paid a fair price however, families are better able to care for their children. The key is in responsible buying.

- 2. Use your voice** – Contact your favourite cosmetics brands and ask them what they are doing to ensure their supply chains are free of child labour and human rights violations. Ask them to make this information publicly available.

Key points:

- Making a statement against child labour and joining a sustainability forum is a start, but ask for evidence that the company is adhering to their commitments and working towards reducing child labour.

Sample questions:

- Have you determined if your supply chains are at risk of child labour?
- Do you have preventive measures against child labour in place?
- If child labour is found in your supply chain, how do you address it?

- 3. Use your power as a consumer** – Do your research and purchase from companies that are publicly committed to eliminating child labour from their supply chains and that publish information on their actions regularly

Key points:

- Companies that completely eliminate the use of palm oil, mica, vanilla, shea, copper and cocoa are not always the best choice, as this action will only further impoverish families that depend on the sale of those commodities to survive, thereby avoiding rather than addressing the root issues of child labour. It's much better to look for companies who are actively working with and supporting the communities where their products are sourced.
- Reach out to cosmetics companies and brands and ask them if their ingredients are sustainably sourced, if they have systems in place to ensure that child labour is not linked to their sources, and if they are engaged in any projects that support local communities where they source their ingredients.
- A growing number of websites, blogs, and social media accounts are dedicated to compiling lists of responsible companies and responsibly-sourced products. Consider compiling your own list and sharing it on your own social media platforms – and soliciting feedback and suggestions from your networks. Share information and contribute to improving the accuracy of such lists over time.

- 4. Support efforts to eliminate root causes** – Engage with and support organisations and companies that are addressing the systemic root causes of poverty in the areas where palm oil, cocoa, mica, vanilla, and copper are produced.

Key points:

- Reducing child poverty and improving households' livelihoods reduces child labour.
- Improving education opportunities for children can reduce child labour. This includes both removing barriers to education, like fees, and improving the quality of local schools.
- Support reputable organisations, such as World Vision or partner organisations, who campaign for child protection and are working to reduce child poverty and improve livelihood and education opportunities. World Vision is actively engaged in child protection in many of the countries listed in this report. Consider sponsoring a child through World Vision to support a family and ensure that children will be able to attend school instead of engaging in child labour.

New Zealand Imports

All import figures are for 2022.¹³⁶

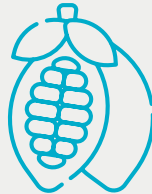


PALM OIL

New Zealand imported 67.8% of its palm oil from **Indonesia** (NZ\$493.6M) and 32.1% from **Malaysia** (NZ\$286.9M). The remaining 0.1% came from Asia-Pacific, Europe*, Africa and South America.

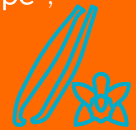
COCOA

New Zealand imported 27% of its cocoa from **Ghana** (NZ\$11.9M), followed by 17.6% from **Australia** (NZ\$8.9M), 12.5% from **Singapore** (NZ\$8.7M), 11.7% from **Malaysia** (NZ\$6.8M), 10.7% from **Indonesia** (NZ\$5.8M), and 9.4% from the **Netherlands*** (NZ\$5.3M). The remaining 11.1% came from 43 countries all over the world, including 0.67% from **Côte d'Ivoire** (NZ\$404,100).



VANILLA

New Zealand imported 41.8% of its vanilla from **Uganda** (NZ\$576,200), followed by 14% from **Papua New Guinea** (NZ\$236,800), 12.3% from **Madagascar** (NZ\$245,200), 10.2% from **Germany** (NZ\$125,400), and 8.3% from the **United States*** (NZ\$71,200). The remaining 13.4% came from 10 countries across Asia-Pacific, Europe*, Africa and the Middle East.



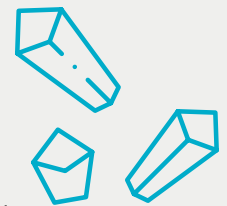
MICA

New Zealand imported 98.4% of its mica from **China** (NZ\$289,000). The remaining 1.6% came from **Canada**, the **United States**, and the **United Kingdom**.



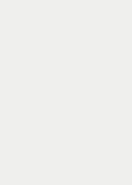
COPPER

New Zealand imported 45.4% of its copper from **China** (NZ\$35,600), 27.7% from **Australia** (NZ\$32,100), and 25% from **Finland** (NZ\$24,100). The remaining 1.9% came from **Germany**, **Denmark**, the **Netherlands** and the **United Kingdom**.



SHEA

New Zealand did not import shea kernels in 2022. However, products imported into New Zealand contain shea butter.



*European and North American exporters of palm oil, cocoa, vanilla, and shea are re-exporters, meaning that the products are exported after import, in varying degrees of processed and unprocessed, to other countries.

Discussion and recommendations

In addition to New Zealand's substantial imports of cocoa, vanilla, and palm oil from countries with high rates of child labour in these sectors, New Zealand imported \$370M in cosmetics in 2022.¹³⁷

It is guaranteed that these cosmetics contain the ingredients discussed in this report, and it is highly probable that some of these ingredients were harvested and mined using child labour, considering the countries from which they were sourced and the numerous touch points within globalised supply chains. For example, New Zealand's top five source countries for cosmetic imports were the United States, Australia, France, China and Korea (totalling NZ\$246M) — all countries which this report shows are some of the top importers of copper, cocoa, vanilla, palm oil and mica.

Similarly, while New Zealand imported 98.4% of its mica from China, China is the world's largest importer of mica, and second largest exporter after India. In 2022, China imported 59% of its mica from India and 19% from Madagascar.¹³⁸ This line can be traced through New Zealand's cocoa imports as well. In 2022, New Zealand's second largest supplier of cocoa (after Ghana) was Australia. Australia's largest supplier was Singapore, whose largest supplier was Malaysia, which imported 46% of their cocoa from West Africa.¹³⁹

Therefore, while New Zealand may import cosmetics and ingredients from countries with fewer instances of child labour, the lack of transparency around where these countries are importing their minerals and ingredients, or in many cases finished products, from significantly increases the risk that New Zealand's imports are tied to child labour.

While New Zealand cosmetic and skincare companies are often labelled as cruelty-free, most do not disclose whether the ingredients they import are free from child labour. Moreover, a desk-based review of companies showed that the majority do not publicly disclose where their products are sourced from and are not transparent about whether child labour was involved. In many cases, this lack of transparency is due to the lack of knowledge regarding the origins of their products.

The complexity of the global production process has engendered opaqueness across supply chains, particularly beyond the first tier (direct supplier). Recent research showed that 45% of New Zealand companies lack visibility into tier two of their supply chain (their supplier's suppliers), and 70% of companies had no initiatives in place to address modern slavery, including the worst forms of child labour, in their supply chains.¹⁴⁰

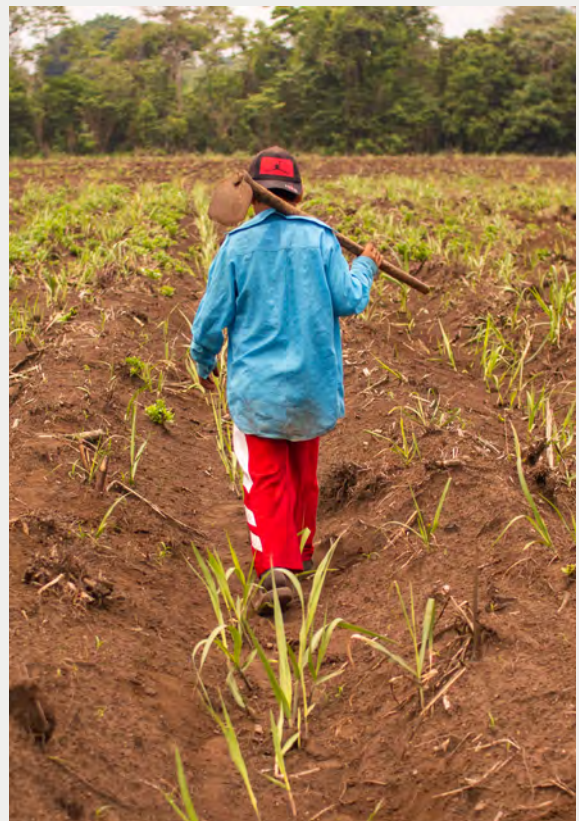


©2013 World Vision

Recommendations to the New Zealand Government and companies

World Vision New Zealand calls on the government and cosmetic companies to help end child labour and modern slavery by taking the following actions:

- 1. The New Zealand Government should prioritise enacting modern slavery legislation.**
- 2. The New Zealand definition of modern slavery should include conduct that would constitute “the worst forms of child labour” as defined in Article 3 of the ILO Convention (No. 182) concerning the Prohibition and Immediate Action for the Elimination of the Worst Forms of Child Labour, done at Geneva on 17 June 1999 ([2007] ATS 38).¹⁴¹**
- 3. Compulsory transparency in supply chains and due diligence should be key features of New Zealand’s modern slavery legislation** as this will require businesses to understand their supply chains and identify risks to people and take action to address those risks.
- 4. The New Zealand Government should require all product labels on New Zealand-made products to specify “palm oil” as an ingredient,** rather than including it under general terms, such as “vegetable oil”.
- 5. The New Zealand Government should consider amending the Customs and Excise Act 2018 to include prohibition of imports made by child or forced labour.**
- 6. New Zealand skin care and cosmetic companies should map out their supply chains to examine whether they are importing palm oil, cocoa, vanilla, shea, mica and copper linked to child or forced labour to make their products, or finished products made using these ingredients.** Where it is likely that they are importing these products, they should set up robust policies and procedures to address and mitigate this including working with suppliers, supplier code of conducts and modern slavery response plans that guide a business response to modern slavery allegations/incidents.
- 7. New Zealand companies importing cosmetics should work with their suppliers to carry out modern slavery risk assessments and understand whether they are importing products made with slavery.** They should collaborate with other companies importing cosmetics to identify and manage modern slavery risks across the cosmetics industry.



©2023 World Vision



Learn more: Visit World Vision New Zealand's Advocacy page (<https://www.worldvision.org.nz/causes/advocacy/modern-slavery-legislation/>)

ENDNOTES

¹ Ingredients were selected based on desk research of industry reports, news and government sources. These were then validated through a series of informal conversations with buyers and industry experts. Silk, carnauba, and candelilla wax were also considered.

² ResearchAndMarkets.com. May 2023. Global Cosmetics Market 2023-2027: Analysis by Product Type, Ingredient and Region. <https://www.researchandmarkets.com/reports/5510744/global-cosmetics-products-market-2023-2027#cat-pos-5>

³ Cosmetics Technology. 26 February 2021. Top ten cosmetics companies in the world. <https://www.cosmetics-technology.com/features/top-ten-cosmetics-companies-in-the-world/>

⁴ The purpose of this report is not to name and shame any companies, but to provide a general indication of what information might be good to check for if consumers want to do their own research, and which areas companies generally need to improve.

⁵ Allied Market Research. 2016. Cosmetics Market – Global Opportunity Analysis and Industry Forecast, 2014-2022. <https://www.alliedmarketresearch.com/cosmetics-market>

⁶ CB Insights. March 12, 2018. 13 Trends Shaping the Face of Beauty in 2018. <https://www.cbinsights.com/research/report/beauty-trends-2018/#agbiotech>

⁷ Sophie Marchessou and Emma Spagnuolo. July 22, 2021. Taking a good look at the beauty industry. McKinsey. <https://www.mckinsey.com/industries/retail/our-insights/taking-a-good-look-at-the-beauty-industry>

⁸ Reilly Roberts. June 25 2022. 2022 Beauty Industry Trends & Cosmetics Marketing: Statistics and Strategies for you Ecommerce Growth. Common Thread Collective. <https://commonthreadco.com/blogs/coachs-corner/beauty-industry-cosmetics-marketing-ecommerce>

Mordor Intelligence. 2023. Cosmetic Products Market – Growth, Trends and Forecast. <https://www.mordorintelligence.com/industry-reports/global-cosmetics-products-market-industry>

⁹ Persistence Market Research. September 2019. Natural Organic Personal Care Product Market <https://www.persistencemarketresearch.com/mediarelease/natural-organic-personal-care-product-market.asp>

¹⁰ Reilly Roberts.

¹¹ Ashley Kang. April 11, 2022. 'Less in More, how the pandemic shifted the beauty market.' Kantar. <https://www.kantar.com/inspiration/fmcg/less-is-more-how-the-pandemic-shifted-the-beauty-market>

¹² ILO and UNICEF. 2021. Child Labour: Global estimates 2020, trends and the road forward, ILO and UNICEF, New York.

¹³ Ibid

¹⁴ International Labour Organization, Organisation for Economic Co-operation and Development, International Organization for Migration and United Nations Children's Fund. 2019. Ending child labour, forced labour and human trafficking in global supply chains https://www.ilo.org/wcmsp5/groups/public/---ed_norm/---ipec/documents/publication/wcms_716930.pdf

¹⁵ UNICEF. 9 June 2021. Child labour rises to 160 million – first increase in two decades. <https://www.unicef.org/press-releases/child-labour-rises-160-million-first-increase-two-decades>

¹⁶ UNICEF. COVID-19 and children. <https://data.unicef.org/covid-19-and-children/>

¹⁷ [UNICEF 2021](#); Prediction based solely on economic effects of the pandemic and does not include additional impacts of school closures, or of any social safety nets created in response to the pandemic.

¹⁸ World Business Council for Sustainable Development. 10 December 2021. UNICEF and WBCSD launch guidance for business leaders on how to step up efforts to eliminate child labor. <https://www.wbcsd.org/Programs/People-and-Society/Tackling-Inequality/Human-Rights/News/UNICEF-and-WBCSD-launch-guidance-for-business-leaders-on-how-to-step-up-efforts-to-eliminate-child-labor>.

¹⁹ Ingredients were selected based on desk research of industry reports, news and government sources. These were then validated through a series of informal conversations with buyers and industry experts. Silk, carnauba, and candelilla wax were also considered.

²⁰ ILO and UNICEF. 2021

²¹ Verisk Maplecroft. 2018. The supply chain risks that could blemish cosmetic reputations. <https://www.maplecroft.com/insights/analysis/supply-chain-risks-blemish-cosmetic-reputations/>

²² ITC calculations based on UN COMTRADE and ITC statistics. Trademap.org. Accessed 27 April 2023. Other major producing countries include: Papua New Guinea, Thailand, Guatemala, Colombia, Myanmar, Ecuador, Ghana and Sierra Leone.

²³ \$65 billion CAD in USD, 27 July 2022 exchange rate.

Margie Mason and Robin McDowell. 24 September 2020. 'We gave our sweat and blood': Palm oil workers cite child labour, slavery and rape. Associated Press. <https://globalnews.ca/news/7355279/palm-oil-forced-labour-top-brands-banks/>

²⁴ Amnesty International. November 2016. The Great Palm Oil Scandal. <https://www.amnesty.org/download/Documents/ASA2152432016ENGLISH.PDF>

- ²⁵ Verité. 2016. Labor and Human Rights Risk Analysis of Ecuador's Palm Oil Sector. <https://www.verite.org/wp-content/uploads/2016/11/Risk-Analysis-of-Ecuador-Palm-Oil-Sector-Final.pdf>
- ²⁶ U.S. Department of State. 2016. Trafficking in Persons Report. <https://www.state.gov/documents/organization/258876.pdf>
- ²⁷ Verité. Palm Oil. <https://www.verite.org/project/palm-oil/>
- ²⁸ Amnesty International. November 2016.
- ²⁹ Zoë Schlanger. 18 September 2019. The global demand for palm oil is driving fires in Indonesia. Quartz. <https://qz.com/1711172/the-global-demand-for-palm-oil-is-driving-the-fires-in-indonesia>
- ³⁰ Margie Mason and Robin McDowell.
- ³¹ ILO. ND. Child labour in plantations (Indonesia). https://www.ilo.org/jakarta/areasofwork/WCMS_126206/lang-en/index.htm
- ³² Amnesty International. November 2016.
- ³³ ILO. ND.
- ³⁴ NLM. Paraquat. <https://toxnet.nlm.nih.gov/cgi-bin/sis/search/a?dbs+hsdb:@term+@DOCNO+1668>
- ³⁵ ITC calculations based on UN COMTRADE and ITC statistics. Trademap.org. Accessed 27 April 2023.
- ³⁶ Efendy Goon, Danial, et al. "Palm Oil in Lipid-Based Formulations and Drug Delivery Systems." *Biomolecules* 9.2 (2019): 64.
- ³⁷ Based on key informant conversation, anonymous, February 2019
- ³⁸ OEC Country Profiles. <https://atlas.media.mit.edu/en/profile/country/civ/>
- ³⁹ Cocoa Barometer 2018. http://www.cocoabarometer.org/cocoa_barometer/Download_files/2018_per_cent20Cocoa_per_cent20Barometer_per_cent20180420.pdf
- ⁴⁰ Cocoa Barometer 2018.
- ⁴¹ International Cocoa Initiative. November 2020. "Changes in hazardous child labour in Côte d'Ivoire's cocoa communities before and after Covid-19 partial lockdown"
- ⁴² International Cocoa Initiative. February 2022. "Cash transfers, resilience and child labour in Ghana.
- ⁴³ de Buhr, E and Gordon, E. 2018. Bitter sweets: prevalence of forced labour and child labour in the cocoa sectors of Côte d'Ivoire and Ghana. Tulane University & Walk Free Foundation. https://cocoainitiative.org/wp-content/uploads/2018/10/Cocoa-Report_181004_V15-FNL_digital.pdf
- ⁴⁴ U.S. Department of State Trafficking in Persons Report. 2016 <https://www.state.gov/documents/organization/258876.pdf>
- ⁴⁵ UNICEF. Child labor – Cocoa in Cote D'Ivoire. https://www.unicef.org/protection/cotedivoire_78210.html
- ⁴⁶ International Cocoa Initiative. February 2022
- ⁴⁷ UNICEF. 2018. Children's Rights in the Cocoa-Growing Communities of Côte d'Ivoire. <https://www.unicef.org/csr/css/synthesis-report-children-rights-cocoa-communities-en.pdf>
- ⁴⁸ World Vision Australia. 2012. Chocolate's Bitter Taste: Forced, Child and Trafficked Labour in the Cocoa Industry. <https://www.worldvision.com.au/docs/default-source/buy-ethical-fact-sheets/forced-child-and-trafficked-labour-in-the-cocoa-industry-fact-sheet.pdf>
- ⁴⁹ de Buhr, E and Gordon, E.
- ⁵⁰ Harkin-Engel Protocol. 2001. https://cocoainitiative.org/wp-content/uploads/2016/10/Harkin_Engel_Protocol.pdf
- ⁵¹ International Cocoa Organization. 2012. Harvesting and post-harvest processing. <https://www.icco.org/about-cocoa/harvesting-and-post-harvest.html>
- ⁵² International Cocoa Organization. 2013. Summary of the process of transforming beans into chocolate and cocoa products. <https://www.icco.org/faq/49-cocoa-butter/105-summary-of-the-process-of-transforming-beans-into-chocolate-and-cocoa-products.html>
- ⁵³ ITC calculations based on UN COMTRADE and ITC statistics. Trademap.org. Accessed 27 April 2023.
- ⁵⁴ Cocoa Barometer 2018.
- ⁵⁵ Gaia Cacao. November 15 2021. 'Global Cocoa Market Study'
- ⁵⁶ Ibid
- ⁵⁷ CosmeticsInfo.org. Theobroma Cacao (Cocoa) Seed Butter. ND. <https://cosmeticsinfo.org/ingredient/theobroma-cacao-cocoa-seed-butter-0>
- ⁵⁸ 475 GHS, 2019 exchange rate
- ⁵⁹ Danwatch. 2018. The hidden cost of vanilla. <https://old.danwatch.dk/en/undersogelse/thehiddencostofvanilla/>
- ⁶⁰ CRS. November 2021. Baseline Survey Report for the VINES project. https://pdf.usaid.gov/pdf_docs/PA00ZG4X.pdf

- ⁶¹ U.S. Department of Labor. Child Labor in Madagascar. <https://www.dol.gov/ilab/reports/child-labor/findings/2011TDA/madagascar.pdf>
- ⁶² Danwatch.
- ⁶³ Ibid
- ⁶⁴ ILO. 2015. Countdown to World Day against Child Labour. http://www.ilo.org/addisababa/media-centre/WCMS_369798/lang-en/index.htm
- ⁶⁵ U.S. Department of Labor. 2017. Child Labor and Forced Labor Reports. <https://www.dol.gov/agencies/ilab/resources/reports/child-labor/madagascar>
- ⁶⁶ Fair Labor Association, June 2021. “A tale of two supply chains: child labor in the vanilla sector in Madagascar.”
- ⁶⁷ CRS
- ⁶⁸ Danwatch
- ⁶⁹ ITC calculations based on UN COMTRADE and ITC statistics. Trademap.org. Accessed 27 April 2023.
- ⁷⁰ CRS
- ⁷¹ Ergon. ND. Support for GSA Sustainability Project Research on three labour and development sustainability issues. https://globalshea.com/uploads/files/shear_2014_the_industry_unites_conference_documents/sustainability_research_document_english-ergon_147.pdf
- ⁷² Global Shea Alliance. 2019. Industry overview. <https://globalshea.com/work/14/Industry-overview>
- ⁷³ Ibid
- ⁷⁴ Ergon.
- ⁷⁵ Ibid
- ⁷⁶ Elias, Marlene, and Seema Arora-Jonsson, 2017. “Negotiating across difference: Gendered exclusions and cooperation in the shea value chain.” *Environment and Planning D: Society and Space* (35.1) 107-125.
- ⁷⁷ Ergon.
- ⁷⁸ Verisk Maplecroft.
- ⁷⁹ Ergon.
- ⁸⁰ Bello-Bravo, Julia, Peter Lovett, and Barry Pittendrigh, 2015. “The evolution of shea butter’s” paradox of paradoxa” and the potential opportunity for information and communication technology (ICT) to improve quality, market access and women’s livelihoods across rural Africa.” *Sustainability* (7) 5752-5772.
- ⁸¹ Note, there are no harmonized codes for shea nuts or shea butter, so we are not able to provide import and export data for this commodity as for the other high risk ingredients.
- ⁸² Terre des Hommes. 2018. Global mica mining and the impact on children’s rights. https://www.terredeshommes.nl/sites/tdh/files/uploads/global_mica_mining.pdf
- ⁸³ Verisk Maplecroft.
- ⁸⁴ National Commission for Protection of Child Rights. 2018. Survey on Education & Wellbeing of Children in MICA Mining Areas of Jharkhand & Bihar.
- ⁸⁵ Roli Srivastava. 6 January 2021. Pandemic drives more people to risk lives in India’s illegal mines. Reuters. <https://www.reuters.com/article/us-india-mica-slavery-feature-idUSKBN29B03H>
- ⁸⁶ Thomson Reuters Foundation. 2016. Blood Mica. <http://news.trust.org/shorthand/mica/>
- ⁸⁷ Thomson Reuters. 2016. Blood Mica: Deaths of child workers in India’s mica ‘ghost’ mines covered up to keep industry alive. <https://www.reuters.com/article/us-india-mica-children/blood-mica-deaths-of-child-workers-in-indias-mica-ghost-mines-covered-up-to-keep-industry-alive-idUSKCN10D2NA>
- ⁸⁸ Roli Srivastava.
- ⁸⁹ Terre des Hommes.
- ⁹⁰ ITC calculations based on UN COMTRADE and ITC statistics. Trademap.org. Accessed 27 April 2023.
- ⁹¹ Statista. 2018. Price of mica. <https://www.statista.com/statistics/804037/us-mica-price/>
- ⁹² Paula’s Choice. ND. Copper Gluconate. <https://www.paulaschoice.com/ingredients/ingredient-copper-gluconate.html?fdid=ingredients>
- ⁹³ SkinStore. 2017. Everything you need to know about copper peptides. <https://www.skinstore.com/blog/skincare/everything-you-need-know-copper-peptides>
- ⁹⁴ U.S. Geological Survey. January 2023. Mineral Commodity Summaries. <https://pubs.usgs.gov/periodicals/mcs2023/mcs2023.pdf>

- ⁹⁵ World Vision. March 2013. "Child Miners Speak." https://www.wvi.org/sites/default/files/Child%20Miners%20Speak_WEB%20Version_0.pdf
- ⁹⁶ U.S. Geological Survey. 2023.
- ⁹⁷ Todd C Frankel. 30 September 2016. The Cobalt Pipeline. Washington Post. <https://www.washingtonpost.com/graphics/business/batteries/congo-cobalt-mining-for-lithium-ion-battery/>
- ⁹⁸ U.S. Geological Survey. January 2020. Mineral Commodity Summaries. "Cobalt" <https://pubs.usgs.gov/periodicals/mcs2020/mcs2020-cobalt.pdf>
- ⁹⁹ Center for Effective Global Action. Child Labor in the DRC Copper Belt in Katanga Region. <https://cega.berkeley.edu/research/child-labor-in-the-drc-copper-belt-in-katanga-region/>
- ¹⁰⁰ Ministère de Plan. December 2021. Etude sur la situation des enfants dans les zones d'exploitation manière artisanale dans les provinces du Lualaba et du Sud-Kivu. pg 8
- ¹⁰¹ Amnesty International. January 2016. "This Is What We Die For": Human Rights Abuses in the Democratic Republic of the Congo Power the Global Trade in Cobalt."
- ¹⁰² Siddharth Kara. Cobalt Red: how the blood of Congo powers all our lives. New York, St Martin's Press, 2023. Pg 243
- ¹⁰³ 50% in Lualaba zone de santé; Ministère de Plan., pg 39
- ¹⁰⁴ Ministère de Plan., pg 84
- ¹⁰⁵ OECD. 2019. "Interconnected supply chains: a comprehensive look at due diligence challenges and opportunities sourcing cobalt and copper from the Democratic Republic of the Congo"
- ¹⁰⁶ Kara. Cobalt Red.
- ¹⁰⁷ World Vision.
- ¹⁰⁸ Amnesty International. January 2016.
- ¹⁰⁹ Kara. Cobalt Red. Pg 52.
- ¹¹⁰ Annie Kelly. 16 December 2019. Apple and Google named in US lawsuit over Congolese child cobalt mining deaths. <https://www.theguardian.com/global-development/2019/dec/16/apple-and-google-named-in-us-lawsuit-over-congolese-child-cobalt-mining-deaths>
- ¹¹¹ ITC calculations based on UN COMTRADE and ITC statistics. Trademap.org. Accessed 27 April 2023.
- ¹¹² Kara. Cobalt Red.
- ¹¹³ Mordor Intelligence.
- ¹¹⁴ Cosmetics Technology.
- ¹¹⁵ PACE Consortium. December 2022. How can we protect children from the worst forms of labour? <https://news.trust.org/contentAsset/raw-data/97f436da-dbab-4025-b7d1-c3a702cff8f3/document1?bylnode=true> Human Rights Watch. November 2022. Obsessed with Audit Tools, Missing the Goal. <https://www.hrw.org/report/2022/11/15/obsessed-audit-tools-missing-goal/why-social-audits-cant-fix-labor-rights-abuses>
- ¹¹⁶ ITC calculations based on UN COMTRADE and ITC statistics. Trademap.org. Accessed 27 April 2023.
- ¹¹⁷ Ibid.
- ¹¹⁸ The purpose of this report is not to name and shame any companies, but to provide a general indication of what information might be good to check for if consumers want to do their own research, and which areas companies generally need to improve.
- ¹¹⁹ Know the Chain. Benchmark Methodology. <https://knowthechain.org/benchmark-methodology/#methodology-2018>
- ¹²⁰ World Benchmarking Alliance. Use our Methodology. <https://www.worldbenchmarkingalliance.org/use-our-methodology/>
- ¹²¹ PACE Consortium.
- ¹²² Human Rights Watch.
- ¹²³ Human Rights Watch.
- ¹²⁴ April 2023 field trip.
- ¹²⁵ Statista. 2019. <https://www.statista.com/statistics/717710/market-share-cosmetics-personal-care-products-markets/>
- ¹²⁶ PACE Consortium. Pg 28
- ¹²⁷ Alliance 8.7. 2017. Global Estimates of Child Labour. https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/documents/publication/wcms_575541.pdf.
- ILO and UNICEF. 2021.
- ¹²⁸ McDermott, Will and Emery. 13 July 2021. The New German Supply Chain Due Dillience Act (with a view across the border). <https://www.jdsupra.com/legalnews/the-new-german-supply-chain-due-8321932/>

- ¹²⁹ Modern Slavery Act 2015. <http://www.legislation.gov.uk/ukpga/2015/30/contents/enacted>
- ¹³⁰ Kamala D Harris. 2015. 'The California Transparency in Supply Chains Act: a resource guide.' <https://oag.ca.gov/sites/all/files/agweb/pdfs/sb657/resource-guide.pdf>
- ¹³¹ Stop Child Labour. 2019. International treaties and agreements. <https://stopchildlabour.org/international-treaties-and-agreements/>
- ¹³² UN Human Rights. 2011. Guiding Principles on Business and Human Rights. https://www.ohchr.org/sites/default/files/documents/publications/guidingprinciplesbusinessshr_en.pdf
- ¹³³ UNICEF and Save the Children. 2012. Children's Rights and Business Principles. <https://www.unicef.org/media/96136/file/Childrens-Rights-Business-Principles-2012.pdf>
- ¹³⁴ Mintel. 2019. Global Beauty and Personal Care Trends. <https://www.mintel.com/beauty-trends/>
- ¹³⁵ OECD. 2021. Costs and Value of Due Diligence in Mineral Supply Chains - OECD Position Paper <https://mneguidelines.oecd.org/costs-and-value-of-due-diligence-in-mineral-supply-chains.pdf>
- ¹³⁶ Stats NZ Tauranga Aotearoa 2022. <https://www.stats.govt.nz/large-datasets/csv-files-for-download/overseas-merchandise-trade-datasets#datasets-for-imports>
- ¹³⁷ Ibid
- ¹³⁸ SITC calculations based on UN COMTRADE and ITC statistics. Trademap.org. Accessed July 2023.
- ¹³⁹ Ibid
- ¹⁴⁰ World Vision New Zealand. 2023. Risky Business: A Modern Slavery Risk Profile of Aotearoa New Zealand Businesses. <https://www.worldvision.org.nz/getmedia/3876ec61-fa28-4e03-9b35-fa5de1a9acee/Modern-Slavery-Business-Research-Report-Final/>
- ¹⁴¹ ILO. 1999. Convention C182 - Worst Forms of Child Labour Convention, 1999 (No. 182). Accessed July 2023.



World Vision is a Christian relief, development and advocacy organisation dedicated to working with children, families, and their communities to reach their full potential by tackling the root causes of poverty and injustice. World Vision serves all people, regardless of religion, race, ethnicity, or gender.