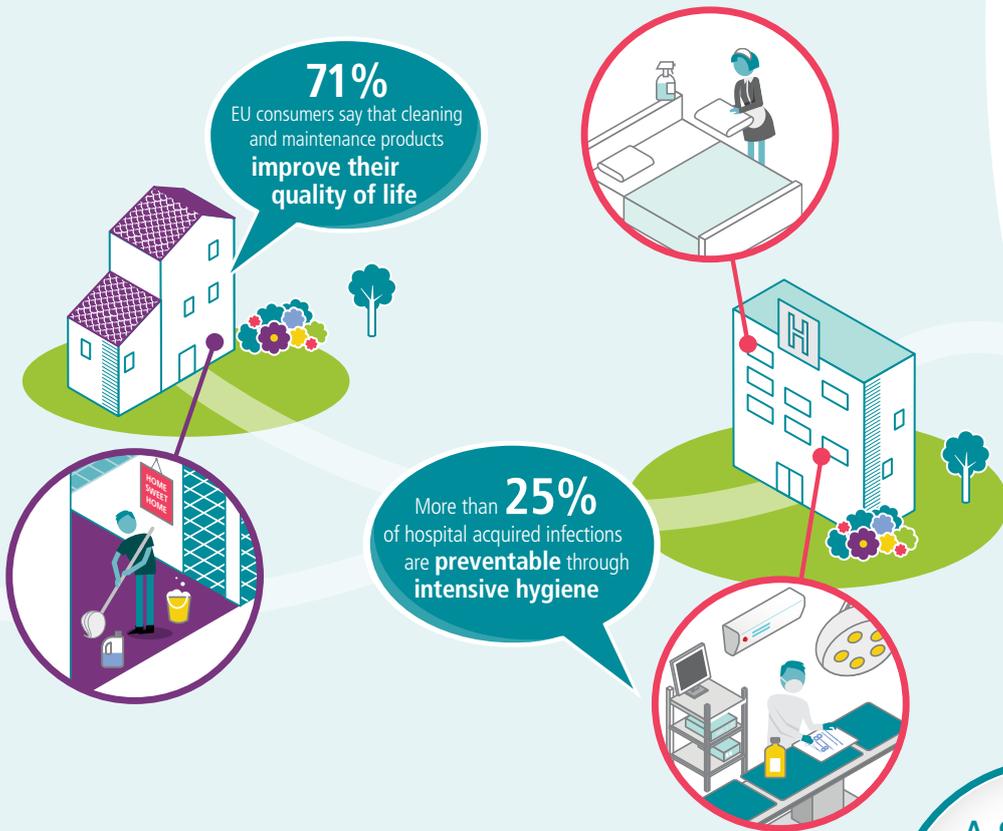




International Association for Soaps, Detergents and Maintenance Products

# ACTIVITY & SUSTAINABILITY REPORT 2017-18

## CLEANLINESS & HYGIENE REGULATORY AFFAIRS SUSTAINABLE DEVELOPMENT



A STRONG NETWORK  
of over **900**  
COMPANIES



<Det>  
<Net>



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## ABOUT A.I.S.E.

A.I.S.E. is the International Association for Soaps, Detergents and Maintenance Products. Based in Brussels, A.I.S.E. has been the voice of the industry to EU regulators for 65 years.

Membership consists of 29 national associations across Europe, 18 corporate members and 6 value chain partners. Through this extensive network, A.I.S.E. represents over 900 companies supplying household and professional cleaning products and services across Europe.

The industry is a substantial contributor to the European economy with an annual market value of €35,9 billion, directly employing 95000 and 360 000 through the value chain.

A.I.S.E. has a long history in leading voluntary industry initiatives that focus on sustainable design, manufacturing and consumption, product safety and safe use of products by consumers and professional customers.

## INDUSTRY VISION

**A prospering cleaning and hygiene industry which is a role model for serving society in an innovative and sustainable way.**

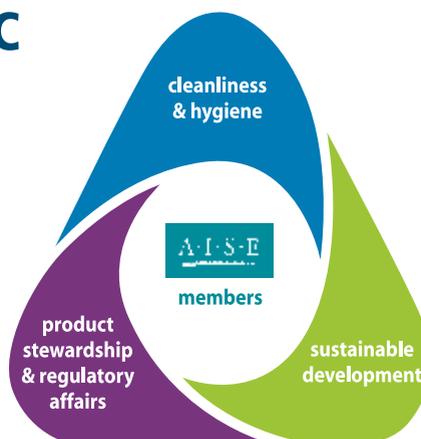
## A.I.S.E. MISSION

We enable our industry to succeed by promoting and shaping a favourable operating framework.

We do this by serving our members in:

- developing and representing our industry perspective with one voice to European policy makers;
- creating and driving industry initiatives;
- engaging with value-chain partners and other key stakeholders;
- leveraging the expertise and diversity of the network of national associations and companies.

## A.I.S.E. STRATEGIC PRIORITIES



# PRESIDENT AND DIRECTOR GENERAL'S MESSAGE



As we look back on the past year and ahead to the next, we can definitely say that these are interesting times: in our economies, in civil society, in our lifestyles and in our industry. Our members – over 900 of them – create products and services that are essential to people's health and hygiene both in and outside the home. But, as disruptive technologies increasingly transform business and creep into our daily lives, they have to act with ever more agility, innovation and vision to compete, thrive and play their vital part in meeting the needs of society and individuals for cleanliness, disease prevention and the proper maintenance of public spaces and people's homes.

88% of EU consumers say that when their place is clean, it gives them peace of mind

## TRANSFORMATIONAL

As the representative of this strong and extensive network in Europe, A.I.S.E. also needs to act with agility and vision. Together with our members and our stakeholders, this is exactly what we have been doing. This past year has been transformational and we are proud to present this annual report detailing the progress we have made over the past 12 months.

For much of this past year, we have been busy bringing to life the "A.I.S.E. 2025 Strategy", as approved by our General Assembly in June 2017. This has led to some structural changes and the creation of a new political and communications plan to support the regulatory affairs and sustainable development pillars, through a more integrated approach.

## IMPACT

The results of these changes are already very much in evidence, with a culmination on 6 December 2017. On that day, we simultaneously hosted EU Commissioner Elżbieta Bieńkowska as the keynote speaker at our 2nd annual Cleaning and Hygiene Forum in Brussels and participated in the 34th UN GHS meeting in Geneva, where we made concrete progress on many key priorities for the industry.

Both events highlighted our ability and commitment to engage directly and effectively with our stakeholders to unleash the power of a competitive and innovative EU single market while securing a safe and healthy environment for citizens.

## HIGHLIGHTS

There are of course many other highlights of the year that you can read about in this report. The A.I.S.E. teams and working groups have worked hard to support members to prepare for the end of the CLP labelling transition period on all related aspects such as DetNet and in-vitro testing. We have contributed expertise and our industry's voice to the Better Regulation agenda, specifically in relation to the REFIT of chemicals legislation (CLP in particular), the review of the Detergents Regulation, the ongoing developments on biocides and industry's concerns as regards the future availability of in-can preservatives, and more.

True to our strong track record of voluntary initiatives, we also continued to deliver progress through increased uptake in our Charter for Sustainable Cleaning and our voluntary initiatives such as our Product Stewardship Programmes and Product Resource Efficiency Projects. The Plastic Strategy of the Commission has also been high on our agenda, being an industry heavily reliant on quality packaging, as well as taking an active role in addressing the issue of microplastics in discussion with regulators.

## MONITORING CONSUMER HABITS

This year, we are happy to release the results of our triennial consumer habits survey. Key insights into issues as diverse as detergent dosage, consumers' attention to on-pack information and trends towards sustainable consumption help us progress our work. Such findings also confirm that citizens view our sector as important for their quality of life and wellbeing both at home and outside the home.

## LOOKING AHEAD

In the year ahead, you can be assured that the A.I.S.E. network will continue to engage proactively with policy makers to contribute to a coherent legislative process that fosters innovation, sustainable development and a circular economy, to realise the full benefits of a single market and ensure that our industry can compete and thrive.

This industry's priorities contribute in very direct manner to the Juncker Commission priorities, as well as to the UN Sustainable Development Goals, as we demonstrate throughout this report. Our members can be justly proud of that contribution, while at the same time continuing to innovate and strive to do more. We look forward to meeting and working with the incoming European Parliament and a new European Commission in autumn 2019.

## THANK YOU

This report represents the engagement, vision and dedication of our whole European network, celebrates the engagement of this industry with all its stakeholders, and the hard work of the A.I.S.E. team within the secretariat and the many engaged experts from the membership in the different working groups. It would not be possible to achieve this without our strong network of national associations and members, the collaboration and support of the global network of international associations, and the engagement with our EU and national stakeholders. We would like to take this opportunity to thank you and wish you all a very positive and innovative year ahead.

Arndt SCHEIDGEN,  
A.I.S.E. President

Susanne ZÄNKER,  
A.I.S.E. Director General

# A.I.S.E. MEMBERSHIP (AS OF JUNE 2018)

A.I.S.E.'s credibility and authority derive from the strength of our network of member companies and national associations, representing altogether over 900 companies supplying household and professional cleaning products and services across Europe. We are committed to leading and engaging in activities that deliver real added-value for all our members, thereby helping the industry to realise its vision.

## 26 NATIONAL ASSOCIATIONS - IN EU/EFTA - ORDINARY MEMBERS

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Fachverband der Chemischen Industrie Österreichs - F.C.I.O.  
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**CZECH REPUBLIC**  
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ORDINARY  
26

29

EXTRAORDINARY  
3

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## 9 SUPPORTING CORPORATE MEMBERS

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**MCBRIDE**  
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**SPECHIM**  
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**VAN DAM BODEGRAVEN**  
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www.vandambodegraven.nl

**VANDEPUTTE SAVONNERIE-ZEEPFABRIEK**  
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**NOVOZYMES**  
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uria@novozymes.com  
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## OPPORTUNITIES FOR A.I.S.E. MEMBERS

By joining A.I.S.E., companies that produce detergents and maintenance products, as well as national associations representing the local interests of their members, and partners in the value chain (such as raw material or packaging suppliers, retailers, the appliance sector etc.), will be able to:

- Participate in a wide industry network, both European and global
- Access valuable A.I.S.E. resources and tools
- Cooperate with partners across the value chain in industry-wide sustainability initiatives
- Influence and contribute to the political agenda at EU level
- Drive the industry agenda and shape the future legislative environment
- Enhance their visibility as an active partner in Europe's cleaning and hygiene industry.

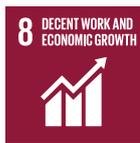
For more information on how to become an A.I.S.E. member, please get in touch with [christine.boudet@aise.eu](mailto:christine.boudet@aise.eu) or [www.aise.eu](http://www.aise.eu).

# A.I.S.E. NETWORK

## REPRESENTING THE DETERGENTS AND MAINTENANCE PRODUCTS INDUSTRY ACROSS EUROPE



### EU & UN PRIORITIES



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The representativeness of the A.I.S.E. network and its unity vis-à-vis our external stakeholders are our key strengths. Partnering, exchange of best practices and fostering capacity building are the DNA of A.I.S.E.'s work. Our role also aims to ensure that our member companies can remain competitive and innovative and continue to be a source of growth and job creation.

A STRONG NETWORK  
of over **900**  
COMPANIES

29

NATIONAL ASSOCIATIONS

18

CORPORATE MEMBERS

8

ASSOCIATE MEMBERS

### INDUSTRY'S RECOMMENDATIONS TO EU POLICY MAKERS



Our commitment to a strong economy is based on the following principles:

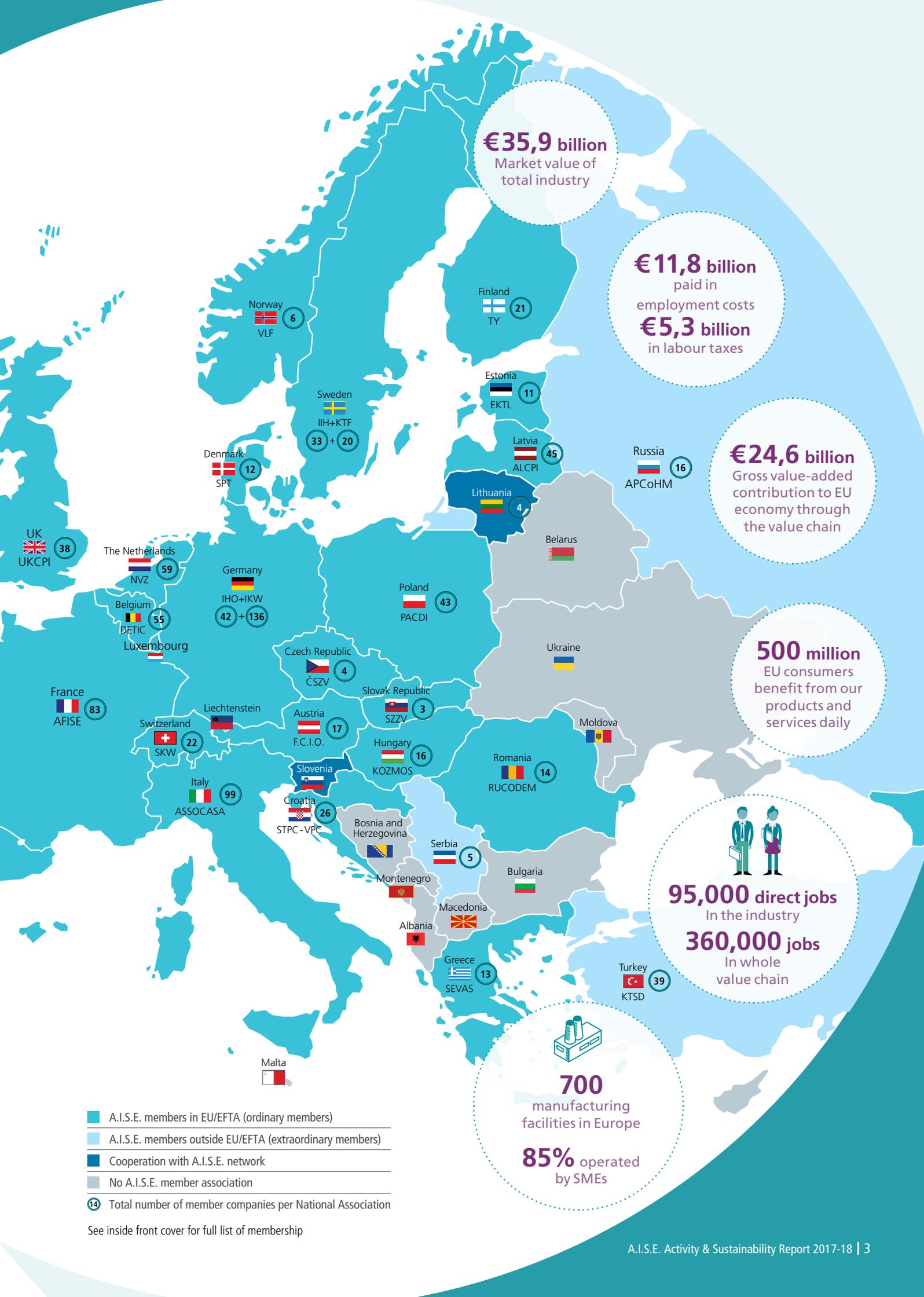
- A SCIENCE-BASED APPROACH
- A COHERENT LEGISLATIVE PROCESS
- AN INNOVATION-FRIENDLY FRAMEWORK
- A STRONG INTERNAL MARKET
- A RECOGNITION OF PUBLIC BENEFITS
- LONG TERM COMMITMENT TO SUSTAINABILITY

Ireland  
ICDA 4

Portugal  
AISDPCL 46

Spain  
ADELMA 112





**€35,9 billion**  
Market value of total industry

**€11,8 billion** paid in employment costs  
**€5,3 billion** in labour taxes

**€24,6 billion** Gross value-added contribution to EU economy through the value chain

**500 million** EU consumers benefit from our products and services daily

**95,000 direct jobs** In the industry  
**360,000 jobs** In whole value chain

**700** manufacturing facilities in Europe  
**85%** operated by SMEs

- A.I.S.E. members in EU/EFTA (ordinary members)
- A.I.S.E. members outside EU/EFTA (extraordinary members)
- Cooperation with A.I.S.E. network
- No A.I.S.E. member association
- 14 Total number of member companies per National Association

See inside front cover for full list of membership

# CLEANLINESS & HYGIENE

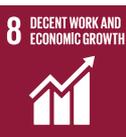
## A CRUCIAL INDUSTRY FOR PEOPLE'S HEALTH AND WELLBEING, IN AND OUTSIDE THE HOME



### EU & UN PRIORITIES



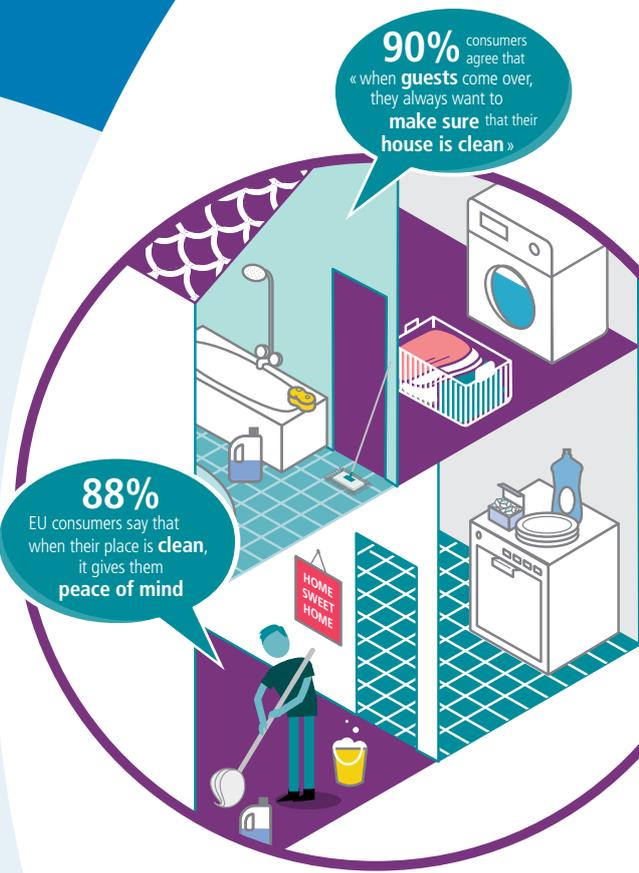
© European Union 2018



The products made by our industry are not only indispensable to the maintenance of people's possessions, but are also essential for good health by combatting the spread of germs, as well as bringing a sense of personal wellbeing. Our companies need to remain competitive and to thrive in order to continue delivering this essential contribution to today's society.

### THIS INDUSTRY DIRECTLY BENEFITS PEOPLE IN MANY WAYS:

- Protects our health and keeps our homes and public places clean and hygienic
- Makes our lives more pleasurable and satisfying
- Adds to our sense of wellbeing
- Facilitates convenient and modern lifestyles
- Maintains the durability of goods
- Increases productivity for companies
- Protects investments in brands
- Contributes to sustainability



**AT HOME**  
€28,6 BILLION  
market value

## KEEPING OUR HOMES CLEAN AND ENSURING OUR WELLBEING

**€35,9 BILLION**  
MARKET VALUE  
2017

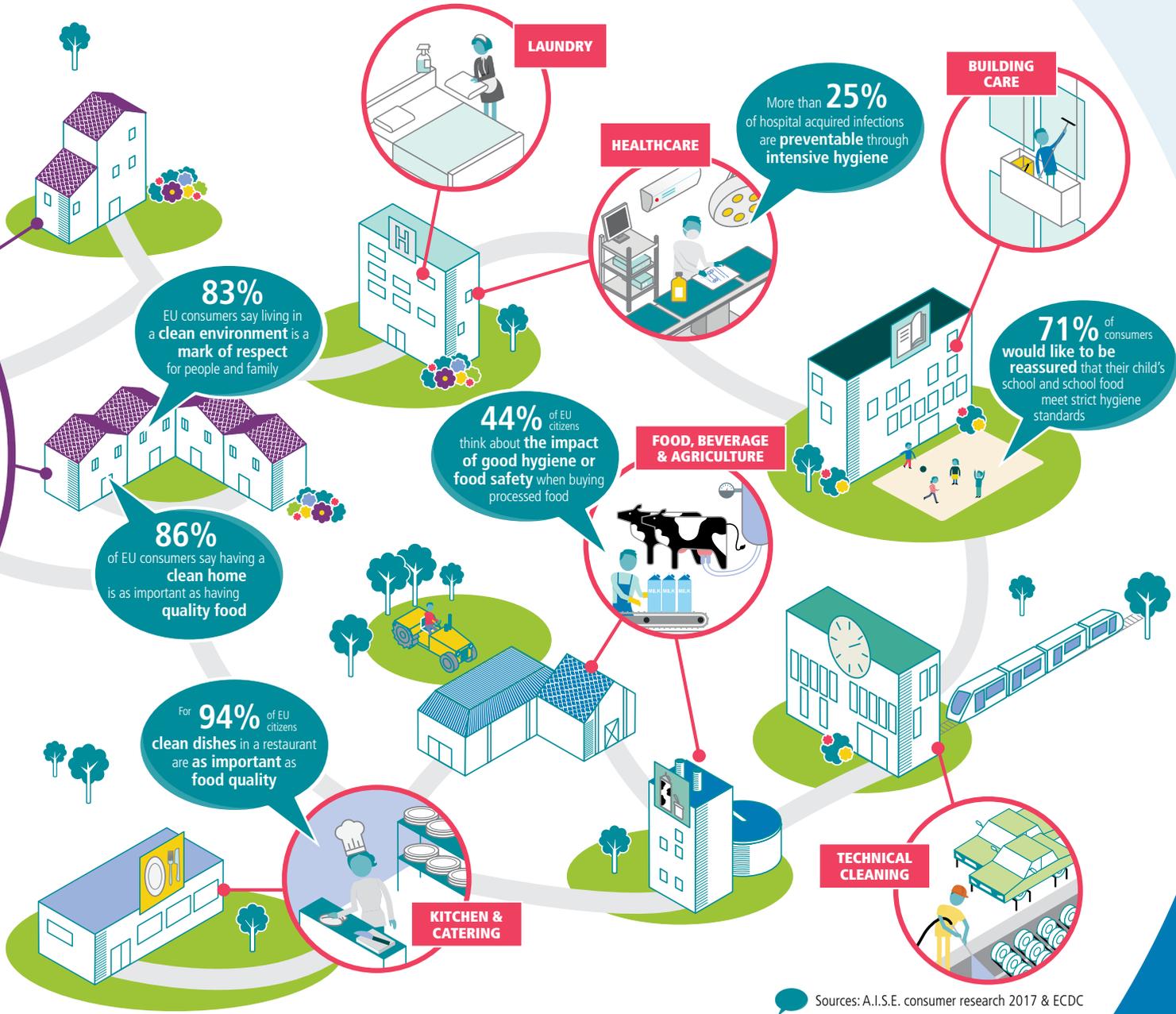


HOUSEHOLD CARE	LAUNDRY CARE	SURFACE CARE	DISHWASHING	MAINTENANCE PRODUCTS	BLEACHES	TOTAL
MARKET VALUE 2017 (BILLION €)	13,5	6,1	4,4	3,9	0,7	28,6
	4,3 liquid detergents 2,6 powder detergents 2,8 laundry aids, others 2,5 fabric conditioners 1,3 detergent tablets	4,4 surface care 1,7 toilet care	2,6 automatic dishwashing 1,8 hand dishwashing	2,4 air fresheners 0,8 home insecticides 0,7 polishes		
MARKET SHARE (%)	47.3	21.2	15.4	13.8	2.3	100
GROWTH (%) 2017 vs. 2016	0.9	1.4	1.4	1.9	-0.3	1.2

Source: Euromonitor.

# FUNDAMENTALLY SUSTAINING SOCIETY WITH PROFESSIONAL CLEANING SOLUTIONS

**OUTSIDE THE HOME**  
**€7,3 BILLION**  
 market value



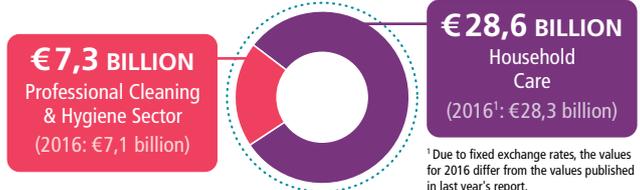
Sources: A.I.S.E. consumer research 2017 & ECDC

PROFESSIONAL CLEANING & HYGIENE	HEALTHCARE	FOOD, BEVERAGE & AGRICULTURE	KITCHEN & CATERING	TECHNICAL CLEANING	BUILDING CARE	LAUNDRY	TOTAL
MARKET VALUE 2017 (BILLION €)	1,8	1,4	1,4	1,2	0,8	0,7	<b>7,3</b>
MARKET SHARE (%)	24.1	19.7	19.3	17	11	8.9	<b>100</b>
GROWTH (%) 2017 VS. 2016	5.9	3.8	0.8	4.1	0.2	3.8	<b>1.7</b>

Source: A.I.S.E. national associations' data benchmarked with company experts estimation. Total EU + CH+ NO.

# MONITORING MARKET AND CONSUMER TRENDS

MARKET VALUE 2017  
**€35,9 BILLION**  
 Total industry  
 (2016<sup>1</sup>: €35,4 billion)



2017 has seen a steady growth for the European industry, with an increase of 1.2% vs 2016 for the household market and 1.7% for the professional cleaning and hygiene sector. All household care markets have grown slightly, in particular surface care and maintenance products. In the professional cleaning sector, there is growth in most markets, in particular in the area of healthcare. In this section you will also find key highlights from market and consumer trends.

## TOP TRENDS IN GLOBAL HOME CARE

### Lifestyles

- 1. New business models** (e.g. online shopping) are redefining consumers' expectations
- 2. Healthy lifestyles** are becoming a normal way of life, with more focus on hygiene at home
- 3. Market segmentation** is following change in gender roles, with more men involved in housework
- 4. Modern lifestyles are driving convenience**, with greater competition for easy to dose detergents
- 5. Environmental care** is driving cold washing, with additional economic benefits

### Products

- 6. Consumers are moving from visual to sensory** impact in laundry, with fresh fragrances overtaking whiteness as a priority
- 7. There is a shift in concentrated formats** from powders to liquids in both dishwashing and laundry
- 8. The drive for compaction** has impacts beyond the product on packaging, ingredients and retailing

### Markets

- 9. Latin America** drove sales of home care products in 2016, with mature markets giving way to those with unexploited potential
- 10. Private labels are expanding to emerging markets**, with increasing levels of retail concentration.

Source: Euromonitor

## Pan-European Consumer Habits Survey

In 2017, A.I.S.E. commissioned its fourth survey of consumers' cleaning and laundering habits, and perceptions of the cleaning and hygiene industry. The survey covered 23 countries across Western, Southern, Eastern and Northern Europe with approximately 200 respondents per country, totalling 4611 panellists. Trends are monitored by comparing results with 2014, 2011 and 2008 surveys.

### The findings show:

- A broad recognition that cleanliness and hygiene in and outside the home is key and as important for consumers as being in good health
- A relatively stable situation with regard to laundry/dish cleaning habits compared to 2014
- Opportunities for further progress in consumer habits notably with regard to dosage, sustainable consumption and safe storage
- A stable situation concerning the perception of product safety, but a slight decline in people's interest to read on pack information
- Relative stability in trends regarding sustainability and laundry/cleaning products versus three years ago.

## BENEFITS OF PROFESSIONAL CLEANING

Widespread improvements in the quality of lives of Europeans outside their homes are delivered through the use of professional products, services and equipment.

- 1. Protection from disease** – infectious diseases remain one of most important causes of illness, in particular in industrial, commercial and institutional environments
- 2. Protection of investments in brands** – brands are an important source of competitive advantage for western businesses. Sophisticated professional cleaning packages reduce the risk of contamination, protecting reputations, businesses and brands.
- 3. Modern lifestyles** – consumers expect choice and safety, and trust service providers (pharmaceuticals, hospitality, healthcare etc.) to also ensure their safety. This trust underpins the way we live today.

Source: The Household Care and Professional Cleaning and Hygiene Products Industry: A Socio-Economic Analysis (Huggard Consulting Group)

### Did you know that...

- 37,000 patients die** each year due to hospital acquired infections in Europe
- More than **25% of hospital acquired infections are preventable** through intensive hygiene

Source: European Centre for Disease Control



A.I.S.E. has published a detailed summary of the survey findings, on [www.aise.eu/publications](http://www.aise.eu/publications)

**AT HOME, CLEANLINESS IS ABOUT MUCH MORE THAN JUST GETTING RID OF DUST!**  
**OUTSIDE THE HOME, CLEANLINESS AND HYGIENE ARE ESSENTIAL AND LEAD TO POSITIVE BEHAVIOURS.**

Results from 2017 consumer habits survey

Throughout this report, we share facts and figures from the 2017 consumer habits survey. Wherever you see these bubbles, this conveys European consumers' perceptions and habits.

# EXCHANGING WITH OUR STAKEHOLDERS DURING ANNUAL CLEANING & HYGIENE FORUM

In December 2017 A.I.S.E. pursued its constructive collaboration with stakeholders at its second annual Cleaning & Hygiene Forum. The event provided an excellent platform for discussion and exchange between more than 150 representatives from EU institutions, Member State authorities, stakeholders and industry in Brussels.

Speakers from industry, regulatory and academic backgrounds shared their perspectives on opportunities and frameworks for the future of the industry, in particular in the areas of health and hygiene, the industry's innovative solutions and the relevant EU framework for the future of the business.

## Engaging with stakeholders to drive progress

A panel discussion followed on the challenges and opportunities faced by the industry in Europe today, the regulatory barriers to a fairer and deeper EU Single Market, as well as a clear need for business certainty and predictability. Regulatory discussions emphasised the need for a level playing field in three policy areas that are of top priority to the industry:

1. Opportunities brought by the **better regulation agenda** for more effective information to consumers on safe use;
2. The call for consistent implementation of classification and labelling of detergents under CLP across Europe leading to **appropriate information for end-users**; and
3. The need to secure the future **availability of key biocidal ingredients** to preserve liquid detergents.

The Forum concluded with the perspective of the keynote speaker Commissioner Elżbieta Bieńkowska, Commissioner for the EU Internal Market, Industry, Entrepreneurship and SMEs who emphasised "How much detergents contribute to our daily life, and how our health and safety depend on these products."

As part of the event, a life-size exhibition visualised the benefits that the industry brings to the lives of people in and outside their homes including new research on consumers' perceptions of cleanliness and hygiene and their cleaning and sustainability habits.

See also pages 4-6 for more details.

*"Remaining relevant to people, whilst addressing the sustainability challenges, requires both audacious, responsible innovations and a supportive legislative framework".*

*Nitin Paranjpe, President, Unilever Home Care Business.*



*"The hygiene hypothesis that 'we are too clean' (and that this is the cause of all our ills and allergies) is a threat to the reality that infectious diseases are prevalent, cause suffering and are costly. Infections are preventable, and targeted hygiene can prevent illness."*

*Dr. Lisa Ackerley, Visiting Professor of Environmental Health at the University of Salford and Professorial Fellow of the Royal Society for Public Health.*



*"Be creative, be innovative and be a global leading force of innovation in your sector."*

*Commissioner Bieńkowska visiting the A.I.S.E. exhibition on the benefits of cleaning and hygiene products in and outside the home, together with S. Zänker, A.I.S.E. Director General, and A. Scheidgen, A.I.S.E. President.*



# 3 SUSTAINABLE DEVELOPMENT

## ACHIEVING SIGNIFICANT SAVINGS THROUGH VOLUNTARY ACTION ACROSS THE MARKET



### EU & UN PRIORITIES





6 CLEAN WATER AND SANITATION



12 RESPONSIBLE CONSUMPTION AND PRODUCTION



13 CLIMATE ACTION

© European Union 2018  
Jobs, Growth & Investment

Cleaning and hygiene products and services are essential to society and our commitment is to deliver impactful projects in a responsible way, promoting sustainable production, design and consumption. By working together to tackle water quality through chemical safety, reducing our environmental footprint and embracing the circular economy, we steer best practices and aim to be a role model industry.

## THE CHARTER FOR SUSTAINABLE CLEANING

### INDUSTRY'S FLAGSHIP INITIATIVE SINCE 2005

- Voluntary initiative, open to manufacturers and distributors
- Tailored to the household care industry and the professional cleaning & hygiene sector
- Based on life cycle thinking and science
- Driving progress in sustainable production, design and consumption
- Measuring progress, reporting and independently verified
- Efficient and innovation friendly
- Positive feedback and stakeholders' support

**245**  
COMPANIES  
=  
LARGE MAJORITY  
OF THE MARKET  
**110** manufacturers  
**135** distributors

SOURCING




**RESPONSIBLE PRODUCTION**  
**RESPONSIBLE DESIGN**

An A.I.S.E. voluntary sustainability initiative - [www.cleanright.eu](http://www.cleanright.eu)

### VOLUNTARY INDUSTRY RESOURCE EFFICIENCY INITIATIVES

Since 2000, A.I.S.E. has run a number of Product Resource Efficiency Projects for powder and liquid laundry detergents (PREPs), leading to big environmental savings.

The PREPs involve:

- Voluntary commitments by detergent companies
- Optimal use of ingredients, packaging and energy in specific product categories
- High levels of product concentration in a short timeframe
- Industry-wide approach to drive sustainable habits amongst consumers

120 ml



2009

55 ml<sup>1</sup>



2018

110-150 gr



2000

75 gr<sup>1</sup>



2018

**LIQUIDS**

**POWDERS**

<sup>1</sup> Maximum recommended dosage (per standard wash) - requirement of A.I.S.E. PREPs. More details: [www.aise.eu/preps](http://www.aise.eu/preps)

## PRODUCTION



### Thanks to responsible production:

- **35% less energy use** per tonne of production (since 2006)<sup>2</sup>
- **36% less CO<sub>2</sub> emissions** (since 2006)<sup>2</sup>



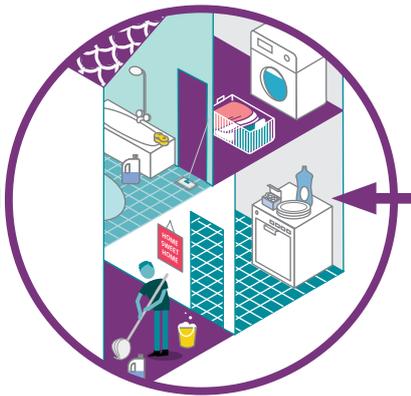
## USE



### GUIDING SUSTAINABLE CHOICE



### ENCOURAGING SUSTAINABLE USE



### RESPONSIBLE CONSUMPTION

## ENGAGING CONSUMERS

### CONSUMERS CAN DELIVER SIGNIFICANT SAVINGS

- The use phase accounts for a significant part of the environmental footprint
- Sustainable purchasing decisions and washing habits are needed
- Appropriate dosage and optimal use of water/energy make a difference
- Industry provides sustainable consumption tips for most product categories
- Sustainable information is on pack, on [www.cleanright.eu](http://www.cleanright.eu) and communicated via targeted campaigns



Save packaging - recycle



Wash at low temperature



Dose economically. Use the dosage instructions



Scrape instead of pre-rinsing



Use the dosage instructions

**61%** believe innovation can make the industry more sustainable

**48%** EU consumers always sort detergent packaging for recycling

### Thanks to responsible design:

- **9 product categories** covered
- **1.5 billion products** carried the Advanced Sustainability Profile logo in 2017<sup>2</sup>

### Thanks to Charter product criteria:

- **25% less packaging** (since 2006)<sup>2</sup>

## DESIGN



## END-OF-LIFE



<sup>2</sup> Charter KPIs 2005-2017 (see inside back cover)

## STEERING BEST PRACTICE THROUGH VOLUNTARY INITIATIVES AND GUIDANCE

We create and drive voluntary industry initiatives to promote sustainability, safety and safe use of cleaning and hygiene products at home and in the workplace, striving towards sustainable development, a circular economy and the UN Sustainable Development Goals.

### A.I.S.E. Charter for Sustainable Cleaning



The Charter is A.I.S.E.'s flagship initiative driving best practice on sustainable development in our industry, in line with the UN Sustainable Development Goals. This voluntary scheme encourages the whole industry to undertake continual improvement towards more sustainable design, manufacture and use of cleaning products in both the household and professional sectors.

Results from the 2017 KPI reporting demonstrate this progress with a further decrease of CO<sub>2</sub> emissions, less water consumption and reduced packaging weight per product (see inside back cover). In addition, membership of the Charter is growing continuously and now stands at nearly 250, including manufacturing companies and distributors or retailers placing products on the market under their own labels. The Charter is highlighted as a best practice industry case study in CSR Europe's White Paper focussing on the Sustainable Development Goals. (May 2018).

### Guidance on CSR

This past year A.I.S.E. finalised a Social Responsibility guidance document for our industry sector, which has now been validated following a stakeholder consultation.

The document maps out four areas of sustainability social dimension – namely human rights, labour practices, fair operating practices, and community involvement and development. It helps companies identify what to prioritise and sets expectations for each, based on EU legislation, international standards and guidelines. A self-evaluation tool will be made available as part of the guidance for companies to assess their risks related to social sustainability areas.

### Bio-based materials

During 2017, the A.I.S.E. Bio-based Task Force was mandated to make more visible what companies are doing with regard to their raw materials supply and to develop a guiding framework on the core principles that should drive companies' choices. While this work is in progress, A.I.S.E. strengthened its link with stakeholders by attending the European Palm Oil Conference 2017, joining discussions on the responsible sourcing of palm oil.

### Environmental benefits of resource efficiency projects

In March 2018, the latest A.I.S.E. PREP project closed. This industry-wide initiative to make household liquid laundry detergents more resource efficient involved 14 companies and ran from 2016-2018 across the EU+4 countries. It has brought about a commitment from companies to reduce the standard dosage to maximum 55ml per laundry load. This commitment is expected to deliver annual savings of 250,000 tonnes of liquid detergent and 10,000 tonnes of packaging.



A.I.S.E. will issue close-out reports highlighting the benefits two earlier PREP projects in June 2018. The compaction of powder detergents (two consecutive projects between 2009 and 2014) involved a commitment to a maximum dosage of 75gr (per standard wash), leading to estimated reductions of 162,000 tonnes of ingredients and 12,000 tonnes of packaging per year.

Another compaction project for liquid detergents which ran from 2009-11 required a commitment to a maximum dosage of 75ml (per standard wash), leading to a reduction of 310,000 tonnes of ingredients and 25,000 tonnes of packaging per year. Details of all these savings can be found [www.aise.eu/preps](http://www.aise.eu/preps). The PREPs projects are aligned with the Charter criteria for laundry detergents.

### Joint tips for sustainable laundering

To simplify and strengthen their messages to consumers, A.I.S.E. together with its partners in the value chain, APPLIA (household appliances) and GINETEX (textile care labelling) have jointly published common tips for sustainable laundering. As the use phase accounts for a significant part of the environmental footprint, sustainable habits by consumers can make a real difference. The useful tips indicate how consumers can save water, CO<sub>2</sub> and money, with the same information communicated by all three industries. Read more on [www.aise.eu](http://www.aise.eu).

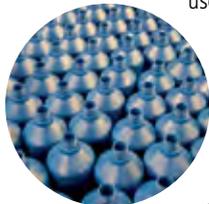


**42.6°C**  
Average wash temperature in Europe (stable vs. 2014)

# ACTIVELY CONTRIBUTING TO KEY EUROPEAN PRIORITIES



## Plastics and packaging



Packaging is key to our sector to avoid product leakage, ensure safe use and enable correct dosage. Substantial savings have already been achieved in the past thanks to voluntary A.I.S.E. initiatives; these address notably efficient design and use of packaging material (cf Charter for Sustainable Cleaning and PREPs projects).

A.I.S.E. was active on a number of fronts in 2017-18 preparing the groundwork for several initiatives relating to plastics and packaging, in the spirit of the EU Plastics Strategy published in January 2018. Specifically we:

- Launched technical work with our Packaging Task Force experts to agree industry guidelines on sustainable packaging design. This led notably to A.I.S.E. encouraging and supporting companies in the industry sector to respond to the European Commission's call for pledges to boost the uptake of recycled plastics, for submission by 30 June 2018.
- Provided input to the review of the Packaging and Packaging Waste Directive, which concluded with an agreement that the EU single market should remain the legal basis for the legislation, a key achievement for the industry.
- Contributed to ECHA's work on the potential upcoming REACH restriction on microplastics intentionally added to products, providing our industry's perspective and data. On this, A.I.S.E. believes that an appropriate definition of what constitutes 'intentionally added microplastic particles' as well as a science-driven and evidence-based approach are essential elements to build an effective EU Strategy for plastics, and define related effective and implementable policy actions.
- Participated in the launch of a cross-industry agreement for the prevention of microplastic release into the aquatic environment during the washing of synthetic textiles, with the goal of arriving at reliable, harmonised measurement methods for secondary microplastics release. This agreement has the support of the Commission and is referred to in the EU Plastics Strategy.



## Assessing ecotoxicology



A.I.S.E. regularly works in partnership with a variety of stakeholders to deliver results more effectively. The industry roundtable organised in November 2017 with ECETOC on current developments in ecotoxicological assessment for product environmental evaluations is an excellent example. The roundtable conclusions were shared, in turn, with the Product Environmental Footprint Technical Advisory Board and the European Commission to raise awareness of the common concerns and to suggest possible improvements to the USEtox methodology.

## EU Product Environmental Footprint project

Following another extension by the Commission of the Product Environmental Footprint (PEF) pilot phase, we continued to refine our pilot study testing a common method of measuring the environmental footprint of household liquid laundry detergents. We aim to finalise this work by the summer 2018 deadline.



*Sascha Nissen reports on the industry's 4 year commitment to the EU's PEF pilot*

The pilot study has confirmed the use phase as the most relevant life cycle phase and that the impact of the other phases is considerably smaller. It is also clear that a number of challenges remain, which should be resolved before the PEF scheme can be effectively deployed further in the sector or market.

These challenges include:

- Lack of robust methodology for life cycle analyses of certain impact areas, despite intensive efforts to date. In particular, the LCA science is still evolving in the area of product ecotoxicity impact, although a well-developed risk-based method does exist for the industry's products, and has been used effectively for some time as part of the Charter Environmental Safety Check.
- The need for a harmonised European approach to turn technical findings into meaningful communication, balancing the various impact areas.



## OUTCOME OF THE PEF ANALYSIS FOR LIQUID LAUNDRY DETERGENTS (MAY 2018)

### Environmental impacts

1. Climate change potential
2. Resource depletion, fossils
3. Particulate matter
4. Acidification

### Most relevant life cycle phases

- Use phase
- Transport to product plant ingredients
- Wastewater operations
- Chemical ingredients sourcing and manufacturing
- Packaging raw materials sourcing and manufacturing (primary packaging)

# 4 REGULATORY AFFAIRS

## CALLING FOR A SINGLE MARKET APPROACH AND THE PROVISION OF ADEQUATE USER INFORMATION

### EU & UN PRIORITIES

Internal Market

Jobs, Growth & Investment

Digital Single Market

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Whilst fully supportive of the Better Regulation agenda, A.I.S.E. sees opportunities to reduce the regulatory burden on our sector by making the single market a reality, thus driving innovation, enabling our industry to remain competitive and securing a safe environment for citizens. We also see great potential for maximising direct engagement with people through the digitalisation of information.

CONSUMER RESEARCH 2017<sup>2</sup>

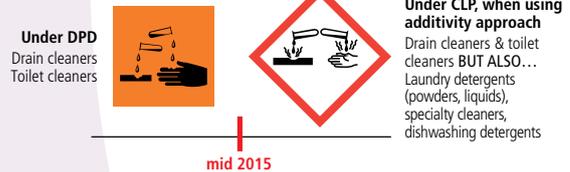
“TOO MUCH INFORMATION IS NOT HELPFUL TO DRIVE SAFE USE”

## SECURING CONSISTENT AND RELEVANT CLP IMPLEMENTATION ACROSS EUROPE

### ➔ THE ISSUE: POTENTIALLY MORE SEVERE LABELLING BASED ON THE ADDITIVITY APPROACH

- From 6% to 55%: total product portfolio which would be labelled corrosive, from DPD to CLP, when using the additivity approach
- Risk of confusion and misuse by consumers

FROM 6% → TO 55%



### ➔ INDUSTRY'S CONTRIBUTION: DETNET: A COLLECTIVE NETWORK TO SHARE DATA FOR THE APPROPRIATE CLASSIFICATION

- A unique tool based on sharing of expertise and toxicological data
- Based on Bridging Principles or Weight of Evidence
- Optimises use of existing data and avoids unnecessary testing
- Transparent and open to authorities (CLP compliant)

149 companies across EU

243 active experts

> 1370 mixtures classified with DetNet

^
<Det>
<Net>
v



## COST OF COMPLIANCE WITH EU LEGISLATION

- ➔ EXTREMELY HIGH<sup>1</sup>
- ➔ DIVERTING INVESTMENTS AWAY FROM R&D AND INNOVATION

COMPLIANCE COSTS = €670 million

Most costly legislation:

- Classification & labelling (CLP)
- Biocidal Products (BPR)
- REACH

}

= 11.3% of the sector's value added

= 33.4% of its profits



<sup>1</sup> Source CCA study, European Commission, 2016



## ZOOM ON THE BACK LABEL

Half of consumers don't read the label before buying a detergent product

# ENSURING MORE EFFECTIVE INFORMATION TO CONSUMERS THROUGH DIGITALISATION

## THE ISSUE: CURRENT REGULATORY REQUIREMENTS DO NOT DRIVE SAFE USE<sup>2</sup>

- Overloaded with regulatory requirements
- Not effective in driving safe use
- Consumers call for simpler labels

### A.I.S.E.'S KEEP AWAY FROM CHILDREN ICON SCORES MUCH BETTER THAN REGULATORY PICTOGRAMS



93% correct understanding



3% very poor understanding



54% correct understanding for corrosion but <1% recognise eye hazard

<sup>2</sup> Source: A.I.S.E. BRES consumer habits research, 2017 (1800 panelists, 4 countries)

### CONSUMER PREFERRED ALTERNATIVE<sup>2</sup>

www.cleanright.eu

(FR) Lessive liquide. Attention. Provoque une sévère irritation des yeux. En cas de contact avec les yeux, rincer avec l'eau pendant plusieurs minutes. Enlever les lentilles de contact si la victime en porte et si elles peuvent être facilement enlevées. Continuer à rincer. Si l'irritation oculaire persiste, consulter un médecin. EN CAS D'INGESTION: Appeler un CENTRE ANTIPOISON / un médecin en cas de malaise. En cas de consultation d'un médecin, garder à disposition le récipient ou l'étiquette. Contient Alpha-isométhyl ionique. Peut provoquer une réaction allergique. (IT) Detergente liquido. Attenzione. Provoca grave irritazione oculare. Tenere fuori dalla portata dei bambini. IN CASO DI CONTATTO CON GLI OCCHI: sciacquare accuratamente per parecchi minuti. Togliere le eventuali lenti a contatto se è agevole farlo. Continuare a sciacquare. Se l'irritazione degli occhi persiste, consultare un medico. IN CASO DI INGESTIONE: contattare un CENTRO ANTIVELENI / un medico in caso di malessere. In caso di consultazione di un medico, tenere a disposizione il contenitore o l'etichetta del prodotto. Contiene Alpha-isomethyl ionico. Può provocare una reazione allergica. (ES) Detergente para ropa líquida. Atención. Provoca irritación ocular grave. Mantener fuera del alcance de los niños. EN CASO DE CONTACTO CON LOS OJOS: aclarar cuidadosamente con agua durante varios minutos. Quitar las lentes de contacto, si lleva y resulta fácil. Seguir aclarando. Si persiste la irritación ocular, consultar a un médico. EN CASO DE INGESTIÓN: llamar a un CENTRO DE TOXICOLOGÍA / médico si la persona se encuentra mal. Si se necesita consejo médico, tener a mano el envase o la etiqueta. Contiene Alpha-isomethyl ionico. Puede provocar una reacción alérgica. En caso de accidente, consultar al Servicio Médico de Información Toxicológica. Teléfono: 91 5620420 (PT) Detergente para a roupa líquido. Atenção. Provoca irritação ocular grave. Manter fora do alcance das crianças. SE ENTRAR EM CONTACTO COM OS OLHOS: enxaguar cuidadosamente com água durante vários minutos. Se usar lentes de contacto, retirá-las, se for possível. Continuar a enxaguar. Caso a irritação ocular persistir, consulte um médico. EM CASO DE INGESTÃO: caso sinta indisposição, contacte um CENTRO DE INFORMAÇÃO ANTIVENENOS/médico. Se for necessário, consultar um médico, mostre-lhe o embalagem ou o rótulo. Contém Alpha-isomethyl ionico. Pode provocar uma reação alérgica.

Producer and manufacturing address AISE ABEL, Blvd du Souverain 165, 1160 Brussels, Belgium

56% of consumers believe digital technologies will offer more opportunities to access information

### INDUSTRY'S PROPOSAL:

- Simplify and prioritise information on pack
  - ▶ Promote icons instead of text (eg Precautionary statements)
  - ▶ Explore digitalisation opportunities
- Ensure information is proportionate to actual risks of the product
- Work with interested industry sectors and stakeholders.

# TACKLING THE OPPORTUNITIES OF THE BETTER REGULATION AGENDA

Our focus is on being a constructive and proactive partner in the development of effective and efficient legislation that unleashes the full potential of the European single market. We bring insights, influence and expertise to the table, while working hard to keep our members informed on technical and policy topics and offering them excellent implementation and compliance support.

## Better regulation and safe use

This past year we have continued to actively support the European Commission's efforts to achieve better regulation, while prioritising, as ever, the safe use of products.

To that end, we contributed to the Commission's fitness check on chemicals legislation, issuing a position paper, giving comprehensive answers to the public consultation and participating in a workshop in October. The final report on the Fitness Check of chemicals legislation was published in December 2017, and Susanne Zänker actively contributed to the Commission's Detergents Working Group session the next day. The staff working document and its political conclusions are expected to be published in 2018 and potential policy options will be enacted as of 2019.

As part of our own Better Regulation and Safe Use (BRES) initiative to improve effectiveness of safe use communication to consumers, we completed extensive qualitative and quantitative consumer research which has yielded valuable insights into the effectiveness of current labels and alternative labelling approaches.

We presented the preliminary findings in December 2017 at the 34th meeting of the United Nations Globally Harmonised System for classification of chemicals, and submitted a working paper to the UN GHS on a precautionary pictogram conveying the message "keep out of reach of children". We also shared the findings at the European level with the REACH and CLP competent authorities (Caracal) in early 2018.

## SECURING ADEQUATE IMPLEMENTATION OF REACH AND CLP

### New CLP annex VIII

Supporting effective CLP implementation remains a key focus for A.I.S.E. and its members. This past year was a busy one with the CLP labelling transition period ending on 1 June 2017 and the new Annex VIII on information to be submitted to Poison Control Centres adopted in March 2017. This new Regulation will have a direct impact on the way companies manage their portfolio of mixtures.

A.I.S.E. actively participated in the preparation of technical guidance on

A.I.S.E. continues to advocate for the formal acceptance and flexible use of the 'keep out of reach of children' icon, which has been in use in EU since 2004, and is very well understood, as the consumer research shows (>90% understanding).



Keep away from children

## Detergents regulation review

In July 2017, A.I.S.E. issued comments on the evaluation of the Detergents Regulation. Although the implementation of the regulation has been a success, new legislation adopted since then means there are overlapping provisions, for which we recommend the following actions:

1. Reduction of the on-pack labelling list of ingredients, focus on what the consumer needs and using of innovative communication technologies
2. Modification of labelling requirements on allergenic fragrance substances in order to eliminate overlaps with CLP
3. Modification of labelling requirements on preservatives in order to eliminate overlaps with CLP and Biocidal Products Regulations
4. Modification of requirement on the medical data sheet in consideration of information to be provided to poison centres (see article on annex VIII below).

In addition, we updated our guidelines for manufacturers on how to comply with the amended detergents regulation (user friendly publication of ingredients).

UFI KMTT-DSP3-7FD7-6RWY

0800 1234 5678

the new legislation and in the various ECHA working groups developing IT tools and establishing the EU Product Categorisation System for the notification of detergents and cleaning products. The preliminary draft guidance is now available and should be finalised later this year.

The unique formulation identifier (UFI code) will enable better targeted medical advice in case of exposure. But concerns remain over the impact of adapting labels to align with changing UFI codes.

## DetNet

We are pleased to report that we have now opened the DetNet tool to Member State authorities on their request and believe that this transparency should further help build trust in the system.

DetNet helps detergents manufacturers to classify and label their products in accordance with CLP and, as of December 2017, is being used by 149 companies to classify more than 1370 mixtures. The tool was updated in 2017 to take into account regulatory developments at OECD and ECHA level, particularly with regard to the use of the Low Volume Eye Test (LVET) and the Isolated Chicken Eye test with histopathology for the classifications of mixtures for eye irritation. Read more on [www.det-net.eu](http://www.det-net.eu)



## In-vitro

In April 2018, the OECD unanimously adopted the revised version of Test Guideline (TG) 438 on Isolated Chicken Eye (ICE) which now includes use of the A.I.S.E. criteria for ICE histopathology. This constitutes a major achievement in line with A.I.S.E. strategy for a sound and proportionate classification and labelling of our products.

## REACH

A big part of A.I.S.E.'s regulatory work last year was helping companies and the authorities get ready for the third REACH registration deadline of 31 May 2018.

In December 2017, we published an update of the full package of improved Use Maps for our sector, which identify and describe the majority of the (end)uses of products relevant to our sector. This update was also made available in CHESAR format so that registrants can easily use it when preparing or updating their registrations. The improved Use Maps cover more than 80% of the product uses identified by A.I.S.E. members, both large and small companies, in the different EU countries.

Meantime, the 2017 REACH review to which A.I.S.E. contributed was published in March 2018. A public conference is planned for June 2018 to discuss the outcomes and follow-up actions, in which we will, of course, participate.

## DUCC



Downstream Users of Chemicals Co-ordination group

Much of the work on REACH and CLP

continues to be coordinated through DUCC, the Downstream Users of Chemicals Coordination group, of which A.I.S.E. is a founder member. In 2017 DUCC focussed on the Exchange Network on Exposure Scenarios (ENES) Work Programme to 2020, particularly on delivering improved Use Maps and Exposure Assessment Inputs (SCEDs, spERCs and SWEDs), the REACH review and on information on safe use of mixtures (SUMIs). DUCC has continued to act as a voice for downstream users in several bodies, and has participated actively in many REACH and CLP events and workshops, including Poison Centres.

# WORKING TOWARDS THE AVAILABILITY OF INGREDIENTS



## Biocidal products

Almost five years after the entry into force of the Biocidal Products Regulation, its implementation still represents a challenge for industry. One of the most important issues is the clarification of the Biocidal Product Family concept and, to that end, late in 2017, ECHA launched a working party of member states and industry, to which A.I.S.E. is committed to contribute. The concept of product families has already proved successful with the recent authorisation of several disinfectant families and we continue to advocate for this approach.

Over the past year we also provided input for the development of a number of ECHA guidance documents such as the efficacy guidance and the soon to be published guidance for the identification of endocrine disruptors under EU legislation for biocides and pesticides (expected June 2018). And we continue to advocate for special attention for the case of in-can preservatives, the availability of which is currently seriously threatened under the biocides legislation, leaving no realistic alternatives for preserving water-based detergents and cleaning products.

## New microplastics task force

Given recent regulatory and stakeholder developments across Europe on marine litter, in particular concerning microplastics, A.I.S.E. has established a microplastics task force. The new task force aims to better understand the potential implications of REACH restriction and to contribute to the ongoing discussion on developing a sound, evidence-based microplastics definition, necessary to effectively tackle the issue of marine litter.

Read more about A.I.S.E.'s position on policy areas of top priority to the industry in these fact sheets available on [www.aise.eu](http://www.aise.eu)



## DRIVING PRODUCT STEWARDSHIP AND INDUSTRY GUIDELINES

Product Stewardship Programmes (PSPs) are voluntary A.I.S.E.-led industry initiatives to promote best practice and raise awareness about safe design and use of particular types of products. A.I.S.E. has run several such programmes since 2007 and two are currently underway. Read more on [www.aise.eu/psp](http://www.aise.eu/psp)

### Air fresheners

A second PSP for air fresheners was launched in 2016 to promote best practices that go beyond regulatory requirements. Companies signed up to the programme committed to meet a number of defined standards by 1 October 2017, and are being monitored. A first set of KPIs will be compiled in 2018.

### Liquid detergent capsules

A.I.S.E. launched a third PSP for liquid detergent capsules in June 2017, introducing new voluntary commitments on superior child-impeding closures, an advertising code of conduct and continued consumer education.

These measures are intended to drive safer use habits of liquid laundry detergent capsules and to further improve the safety of this product category. The latest report on incidents involving capsules in Europe through to the end of 2017 shows that the number of incidents per million capsules sold has decreased substantially since safety measures were introduced.

While A.I.S.E. is encouraged that the safety measures in place are proving effective, we are fully committed to achieving further reductions in the frequency of incidents involving this product category.

#### INCIDENT FREQUENCY WITH LIQUID LAUNDRY DETERGENT CAPSULES

Country	Decrease in incident frequency
Ireland	-51%
Czech Republic	-73%
Italy	-63%
Spain	-34%*
The Netherlands	-44%

Frequency of incidents relative to market presence versus baseline (prior to introduction of PSP measures) during the period Oct 2016 to Sep 2017 (\*except Spain = year 2014)

36% of families with young children still store their laundry detergents unsafely




### Keep Caps from Kids

The industry has an ongoing commitment to education and communication on the safe use of liquid laundry detergent capsules. In September 2017, we relaunched the pan-EU digital consumer education campaign "Keep Caps from Kids", together with 21 national and international partners throughout Europe. The campaign features concrete advice for parents and carers of young children on how to prevent kids from being hurt and how to use capsules safely and store them out of the reach of children through the multilingual web portal [www.keepcapsfromkids.eu](http://www.keepcapsfromkids.eu).

In parallel, pilot campaigns are being run in 2018 in Ireland, Germany and France to reach parents/carers of young children directly through local stakeholders. In Germany, the national association is cooperating with local paediatricians and a child safety organisation to provide leaflets with guidance on the safe storage of all detergents to parents with young children, to ensure products are stored out of their reach.



► IKW in partnership with BAG Mehr Sicherheit für Kinder

#### INDUSTRY GUIDELINES

Through our network of national associations, direct member companies and experts, we are able to draw on rich and varied expertise to form working groups to develop robust and high-quality industry guidelines and advice. These cover:

- **Laundry Detergent Testing Guidelines** for assessing the performance of laundry detergents across Europe in a consistent and robust way
- Industry guidelines on the **safe handling of enzymes** in detergents manufacturing - training material developed in conjunction with AMFEP (Association of Manufacturers and Formulators of Enzyme Products) available on [www.aise.eu/enzymes](http://www.aise.eu/enzymes)
- **Candle emissions standard** aimed at developing a methodology to measure emissions from scented candles with CEN
- Promotion of a **"Do not flush"** icon on disposable wipes
- Guidelines on the **implementation of the Detergents Regulation** to help manufacturers comply with the amended legislation.

# A.I.S.E. BOARD

(FROM JUNE 2018 TO JUNE 2020)

## ORDINARY CORPORATE MEMBERS



**Heather BARKER**  
RB



**Welmoed CLOUS**  
Ecolab



**Jean-Paul DECHESNE**  
Colgate-Palmolive



**Charles-François GAUDEFRY**  
Unilever



**Cornelius BESSLER**  
Dalli



**Ad JASPERS**  
Diversey Europe Operations



**President  
Arndt SCHEIDGEN**  
Henkel



**Vice-President  
Nadia VIVA**  
Procter & Gamble



**Treasurer  
Luis ZUNZUNEGUI**  
SC Johnson



**Ismaël DJELASSI**  
Spechim

## SUPPORTING CORPORATE MEMBERS

## CLUSTERS OF NATIONAL ASSOCIATIONS



**Giuseppe ABELLO**  
Greece, Italy



**Ana-Maria COURAS**  
Portugal, Spain



**Helle FABIANSEN**  
Denmark, Estonia, Latvia, Finland,  
Norway, Sweden



**Chairperson of the National  
Associations Committee  
Sari KARJOMAA**



**Thomas KEISER**  
Austria, Germany, Hungary,  
Switzerland



**Vice-President  
Valérie LUCAS**  
France



**Philip MALPASS**  
Ireland, United Kingdom



**Anna OBORSKA**  
Czech Republic, Poland, Slovakia



**Mihaela RABU**  
Croatia, Romania



**Hans RAZENBERG**  
Belgium, Luxembourg,  
The Netherlands

## OBSERVER



**Heiko FAUBEL**  
Representing the professional  
cleaning and hygiene sector

In June 2018, the Board confirmed the continued mandates of the President, Vice-Presidents and Treasurer for the period June 2018 - June 2020.

## A.I.S.E. TEAM (AS OF JUNE 2018)



**Susanne ZÄNKER**  
Director General



**Christine BOUDET**  
Deputy Director General  
& Legal Affairs



**Martine REBRY**  
Assistant to Director General



**Christèle BAÏER**  
Finance and Administration  
Manager



**Gaëlle VERRYCK**  
Senior Assistant

## SCIENTIFIC & REGULATORY AFFAIRS



**Roberto SCAZZOLA**  
Scientific and Regulatory  
Affairs Director



**Elodie CAZELLE**  
Scientific and Regulatory  
Affairs Manager



**Caroline BERSTEIN**  
Scientific and Regulatory  
Affairs Manager



**Laura PORTUGAL**  
Scientific and Regulatory  
Affairs Manager



**Giulia SEBASTIO**  
Scientific and Regulatory  
Affairs Manager

## SUSTAINABILITY



**Sascha NISSEN**  
Head of Sustainability



**Francesca ANGIULLI**  
Sustainability Manager

## COMMUNICATIONS



**Valérie SÉJOURNÉ**  
Director, Communications  
and Stakeholder Outreach



**Aisling O'KANE**  
Communications Manager



**Caroline DUBOIS**  
Communications Officer

## ADVOCACY



**Mohamed TEMSAMANI**  
Head of External Affairs

# 2017 KPI PERFORMANCE

The Key Performance Indicators (KPIs) shown in the table include the results from 2017 alongside those for earlier years. KPI data is submitted by the Charter Ordinary Member companies to the external consultancy Deloitte which manages the data collection process, and the aggregated results are then provided to A.I.S.E. The companies submit their data for their twelve month financial or sustainability reporting periods during the calendar year. The data reports are subject to an independent verification process conducted by the international audit firm SGS on behalf of A.I.S.E. In order to guarantee the quality and objectivity of the data, a several-step methodology has been adopted that ensures both the integrity and the year-after-year comparability of the KPIs including quality checks, in-depth analysis and consultation with companies to correct data in cases where there is a lack of coherence or quality. All details of this methodology are available via: [www.sustainable-cleaning.com/en.publicarea\\_sustainabilityreport.orb](http://www.sustainable-cleaning.com/en.publicarea_sustainabilityreport.orb)

KPI	REPORTING DATA	2005	2006	2007	2008	2009	2010	2011	2012
 Participating companies	Companies reporting (number of)	8	19	33	45	59	65	72	89
	Manufacturing sites covered	62	78	108	133	152	162	172	191
	% vs Total	81.6%	78.8%	84.4%	88.7%	89.9%	92.6%	94.0%	94.6%
	Production covered	7.3mt	9.3mt	10.5mt	11.1mt	11.1mt	11.6mt	12.0mt	12.1mt
	% vs Total	86.2%	86.1%	92.1%	94.7%	95.7%	97.8%	98.8%	95.3%
	Units of consumer products sold (PC&H not included)	5,800m	8,200m	9,300m	9,700m	10,200m	10,300m	10,600m	10,600m
	Covered by CSP Check	4,100m	6,800m	8,600m	9,200m	9,800m	10,000m	10,400m	10,500m
 Chemicals safety evaluation	% of ingredients (volume) covered by HERA <sup>(2)</sup> (PC&H not included)	64.3%	68.6%	72.9%	75.7%	74.7%	75.5%	72.7%	75.7%
	Production for use under controlled dosing (PC&H only)	Not Available					2.3mt	2.2mt	2.3mt
 Occupational health and safety	Accidents frequency rate (expressed per 100,000 man-hours worked by all employees)	0.57	0.55	0.83	0.90	0.98	0.81	0.83	0.79
 Consumer and customer safety	Number of care lines services	109	258	345	455	545	613	647	730
	Consumer contacts registered: Total	754,197	926,840	903,796	890,746	873,380	813,972	769,244	673,501
	% classified as real or perceived health related contacts	0.6%	1.3%	1.1%	1.5%	1.3%	1.5%	1.5%	1.5%
	% classified as enquiries (e.g. general or related to the safety of the product, ingredients, allergies etc)	1.3%	1.7%	2.4%	2.6%	2.8%	2.5%	3.0%	2.4%
	Persons trained in sessions devoted to safe handling and use of products and systems (PC&H only)	Not Available				74,483	102,146	83,844	112,341
 Consumer and user information	Consumer product units sold: With at least two safe use icons/sentences	1,237m	2,317m	3,495m	4,907m	5,757m	5,949m	6,123m	5,501m
	With more than two safe use icons/sentences	562m	1,549m	2,136m	3,091m	3,618m	3,553m	3,533m	3,292m
	Units sold carrying relevant best use advice (until 2010: Household washing machine laundry detergents units sold carrying the "washright" panel)	361m	444m	935m	1,090m	1,112m	1,197m	1,436m	1,764m
 Poorly biodegradable organics <sup>(1,4)</sup>	kg / % of PBO chemicals <sup>5</sup> , according to the Charter PBO-list, per tonne of production	16.2kg/t	25.4kg/t	24.9kg/t	22.1kg/t	27.2kg/t	23.5kg/t	24.1kg/t	18.9kg/t
		1.6%	2.5%	2.5%	2.2%	2.7%	2.4%	2.4%	1.9%
 Consumed energy and CO <sub>2</sub> emitted <sup>(1)</sup>	GJ of energy consumed per tonne of production	1.34GJ/t	1.09GJ/t	1.10GJ/t	1.05GJ/t	1.03GJ/t	0.95GJ/t	0.91GJ/t	0.91GJ/t
	kg of CO <sub>2</sub> emitted per tonne of production	80.9kg/t	66.9kg/t	64.6kg/t	64.3kg/t	60.9kg/t	57.3kg/t	52.0kg/t	53.0kg/t
 Consumed water <sup>(1)</sup>	m <sup>3</sup> of water (potable and non potable) consumed	1.60m <sup>3</sup> /t	1.44m <sup>3</sup> /t	1.47m <sup>3</sup> /t	1.59m <sup>3</sup> /t	1.49m <sup>3</sup> /t	1.40m <sup>3</sup> /t	1.35m <sup>3</sup> /t	1.44m <sup>3</sup> /t
 Waste <sup>(1)</sup>	kg of waste (hazardous and non hazardous) produced	10.2kg/t	12.9kg/t	11.1kg/t	10.8kg/t	12.4kg/t	11.9kg/t	12.0kg/t	12.1kg/t
	kg of hazardous waste sent off-site	3.2kg/t	3.9kg/t	4.2kg/t	4.1kg/t	3.7kg/t	3.8kg/t	3.8kg/t	2.8kg/t
 Packaging used <sup>(1)</sup>	kg of packaging per tonne of production	78.0kg/t	92.7kg/t	88.6kg/t	84.6kg/t	91.3kg/t	89.9kg/t	91.3kg/t	89.8kg/t
	kg of packaging per thousand consumer units	98.2kg/KU	105.1kg/KU	100.0kg/KU	96.8kg/KU	99.4kg/KU	101.2kg/KU	103.4kg/KU	102.5kg/KU
	t delivered in refillable containers (PC&H only)	Not Applicable					140,597t	140,433t	186,905t
 Products with ASP logo	Number of Household products placed on the market carrying the ASP logo						N/A	198m	688m

m=million - KU=thousand units  
t=per tonne of production



**SINCE 2011, 7 BILLION CONSUMER PRODUCTS CARRY THE ASP LOGO!**

## KPI highlights

### CHARTER FOOTPRINT AND PRODUCTION

103 companies submitted their KPI data. The total production tonnage covered by the Charter was 11.7 mt, equivalent to 99.5% of the total output of reporting companies in the EU+4.

2013	2014	2015	2016	2017
93	92	100	100	103
185	175	183	178	180
94.9%	94.1%	95.3%	95.2%	94.7%
11.1mt	11.2mt	11.4mt	11.7mt	11.7mt
99.6%	99.7%	99.4%	99.3%	99.5%
9700m	11,300m	12,000m	11,700m	13,400m
9600m	11,200m	11,900m	11,600m	13,300m
77.6%	76.4%	73.5%	72.0%	67.5%
2.2mt	0.3mt <sup>(3)</sup>	0.3mt <sup>(3)</sup>	0.4mt <sup>(3)</sup>	0.5mt <sup>(3)</sup>
1.05	0.85	0.69	0.87	1.07
721	759	788	806	838
525,849	686,946	650,550	600,672	540,578
1.3%	1.4%	1.5%	1.6%	1.9%
2.4%	4.1%	4.0%	5.3%	6.9%
95,619	84,540	64,074	64,376	83,651
5,804m	6,341m	6,659m	6,781m	6,657m
2,804m	3,734m	3,870m	3,876m	3,689m
2,269m	3,188m	2,635m	2,972m	2,956m
19.0kg/t	19.5kg/t	18.2kg/t	19.9kg/t	19.0kg/t
1.9%	1.9%	1.8%	2.0%	1.9%
0.81GJ/t	0.79GJ/t	0.76GJ/t	0.71GJ/t	0.7GJ/t
55.6kg/t <sup>4</sup>	54.3kg/t	50.0kg/t	46.4kg/t	42.5kg/t
1.30m <sup>3</sup> /t	1.23m <sup>3</sup> /t	1.23m <sup>3</sup> /t	1.18m <sup>3</sup> /t	1.16m <sup>3</sup> /t
11.0kg/t	12.6kg/t	12.4kg/t	11.7kg/t	12.1kg/t
3.0kg/t	3.9kg/t	4.1kg/t	4.3kg/t	4.2kg/t
84.3kg/t	91.4kg/t	92.6kg/t	90.3kg/t	90.2kg/t
96.5kg/KU	90.6kg/KU	88.0kg/KU	90.3kg/KU	78.8kg/KU
221,577t	7,710t <sup>(3)</sup>	8,444t <sup>(3)</sup>	7,333t <sup>(3)</sup>	10,806t <sup>(3)</sup>
820m	1,003m	1,292m	1,410m	1,577m

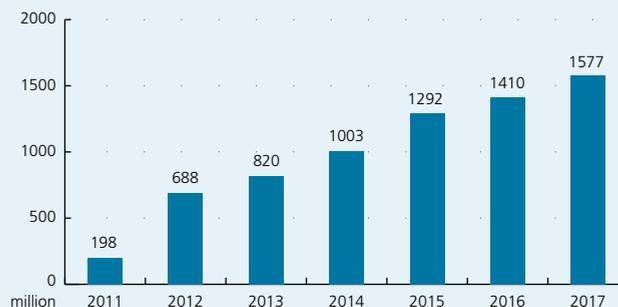
### CHANGES SINCE 2006

Energy use per tonne of production is down by 35.7% and CO<sub>2</sub> emissions by 36.4% over the 11 years since 2006.

### CO<sub>2</sub> EMISSIONS AND ENERGY USE DECLINE, WHILE PRODUCTION GROWS



### 1.5 BILLION CONSUMER PRODUCTS WITH ASP LOGO



The number of consumer products carrying the Advanced Sustainability Profile (ASP) logo increased from 1.41 billion to 1.57 billion units, an increase of 11.8% on a like-for-like basis. From the laundry category alone, 36% of products comply with the Charter Advanced Sustainability Profiles.

### Nature and scope of KPI data verification



As in recent years, SGS conducted an independent assurance of the KPI data gathering processes, looking at the data collection processes of 7 reporting Charter members. Deloitte, who assessed the KPI reporting processes of the companies and aggregated the KPI data, was informed of the outcome of this verification. The companies concerned were asked for confirmation of the reported data or to update their declaration. The full Assurance Statement with detailed conclusions can be found at: [www.sustainable-cleaning.com/en.publicarea\\_sustainabilityreportorb](http://www.sustainable-cleaning.com/en.publicarea_sustainabilityreportorb)

**KPI commentary at [www.sustainable-cleaning.com/charter](http://www.sustainable-cleaning.com/charter)**

<sup>1</sup> Data apply to production covered by the CSP Check. <sup>2</sup> Water is not considered as an ingredient. <sup>3</sup> For compliance reasons, these figures were derived only from SMEs and large companies (excluding multi-national companies) and cannot be compared with the figures for previous years. <sup>4</sup> As to the Charter KPI reporting, all fragrances and non-ionic terephthalate polymers are globally considered as PBOs; even if a relatively large portion of those are easily or inherently biodegradable. Note that A.I.S.E. is reviewing the current list of PBOs and an updated one will be available for next year's KPI reporting. <sup>5</sup> includes water.

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