

SOCIO-ECONOMIC PERSPECTIVE

ENSURING CLEANLINESS AND HYGIENE AT HOME AND IN SOCIETY

An industry that fundamentally sustains society

€35,7 billion
Market value of total industry

95,000 direct jobs
In the industry

360,000 jobs
In whole value chain

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

500 million
EU consumers benefit from our products and services daily

AT HOME

€28,8 billion
market value

The household care industry plays a vital role in consumers' health and wellbeing at home.

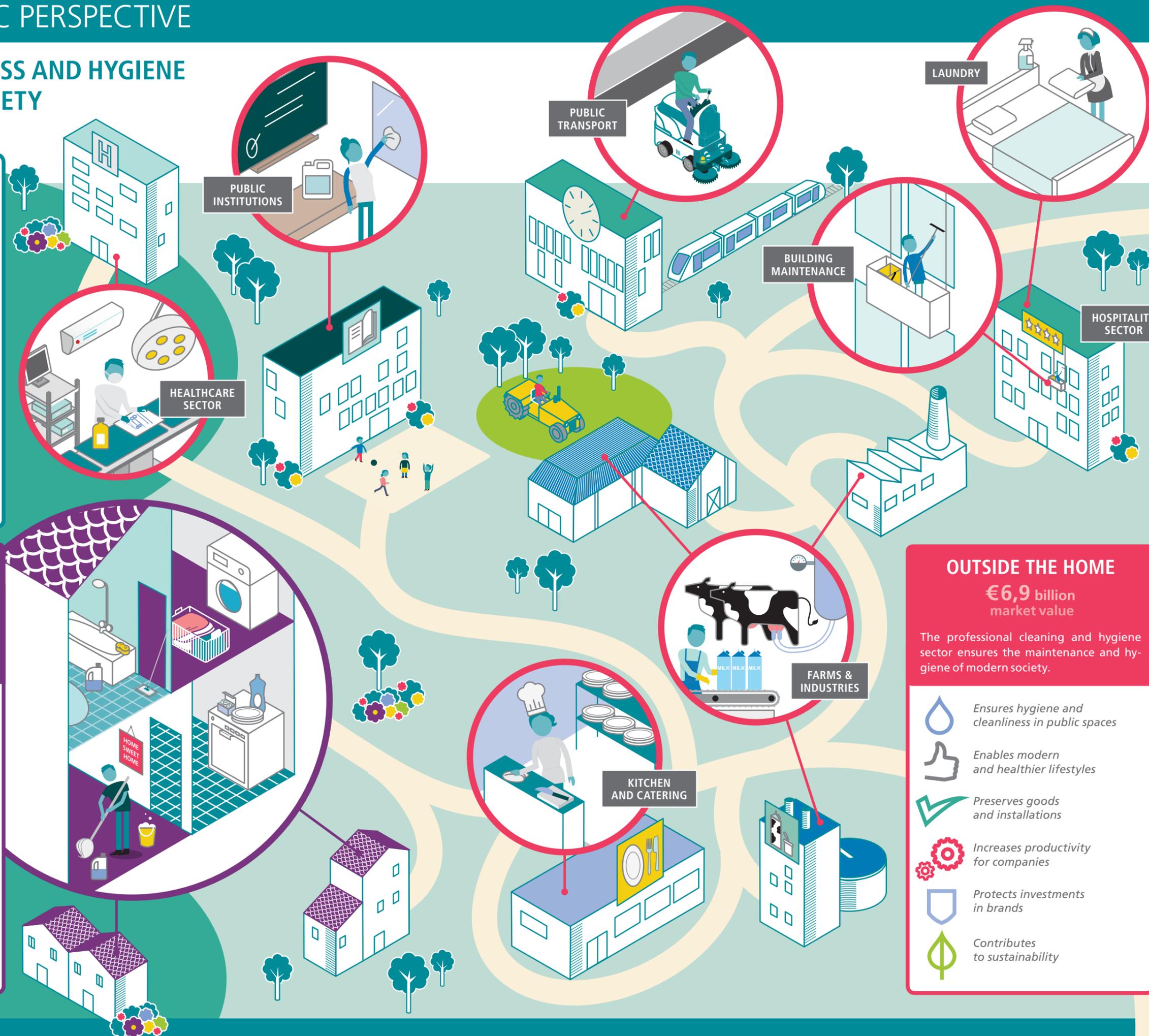
-  Protects our health and keeps our homes hygienic
-  Makes our lives more pleasurable and satisfying
-  Adds to our sense of wellbeing
-  Facilitates convenient and modern lifestyles
-  Maintains the durability of household goods
-  Contributes to sustainability

OUTSIDE THE HOME

€6,9 billion
market value

The professional cleaning and hygiene sector ensures the maintenance and hygiene of modern society.

-  Ensures hygiene and cleanliness in public spaces
-  Enables modern and healthier lifestyles
-  Preserves goods and installations
-  Increases productivity for companies
-  Protects investments in brands
-  Contributes to sustainability



PUBLIC INSTITUTIONS

PUBLIC TRANSPORT

LAUNDRY

BUILDING MAINTENANCE

HOSPITALITY SECTOR

HEALTHCARE SECTOR

FARMS & INDUSTRIES

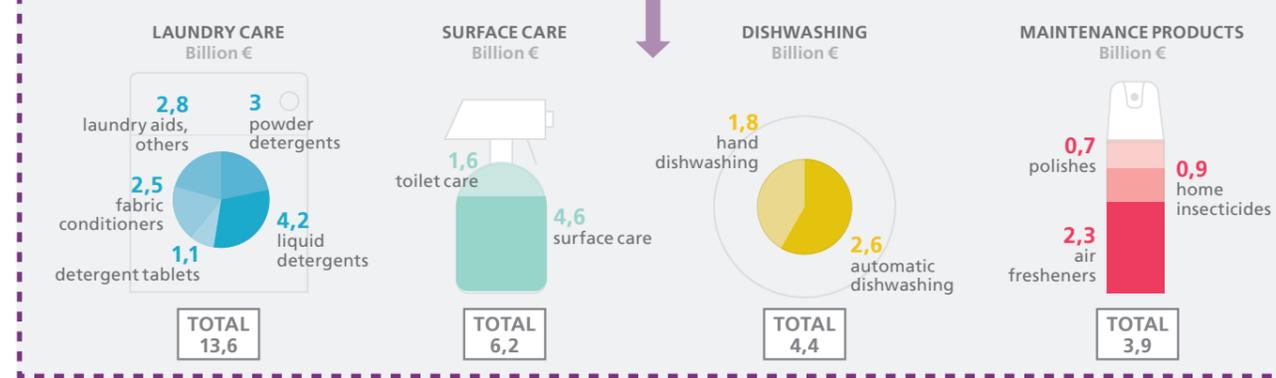
KITCHEN AND CATERING

A SUBSTANTIAL CONTRIBUTOR TO THE EUROPEAN ECONOMY

The European household care and professional cleaning and hygiene industry provides public benefits that go well beyond the economic gains of business activity. Household care and professional cleaning and hygiene products are an essential part of the lives of every European.

MARKET VALUE Billion €	2014	2015
TOTAL INDUSTRY	35,3	35,7
HOUSEHOLD CARE	28,6	28,8
PROFESSIONAL CLEANING AND HYGIENE SECTOR	6,7	6,9

HOUSEHOLD CARE	LAUNDRY CARE	SURFACE CARE	DISHWASHING	MAINTENANCE PRODUCTS	BLEACHES	TOTAL
MARKET SHARE %	47.2	21.5	15.4	13.5	2.4	100
MARKET VALUE * € Billion (2015)	13,6	6,2	4,4	3,9	0,7	28,8
GROWTH 2015 VS. 2014 %	+ 0,3	+ 1,5	+ 1,2	+ 0,7	+ 0,2	+ 0,8



* Source: Euromonitor International. Due to fixed exchange rates, the values for 2014 differ from the values published in last year's report. Total EU + CH + NO.

PROFESSIONAL CLEANING AND HYGIENE	HEALTHCARE	FOOD, BEVERAGE & AGRICULTURE	KITCHEN & CATERING	TECHNICAL CLEANING	BUILDING CARE	LAUNDRY	TOTAL
MARKET SHARE %	23.7	20.2	19.6	16	11.5	9	100
MARKET VALUE * € Billion 2015	1,6	1,4	1,4	1,1	0,8	0,6	6,9
GROWTH 2015 VS. 2014 %	+ 6	+ 5	+ 6	- 3	- 2	+ 3.5	- 3

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

Employment in Europe

- Financial control
- Manufacturing
- Sustainability Managers
- Compliance
- Human Resources
- Technical support
- Sales
- Research & Development
- Marketing
- Distribution & Logistics

95,000 direct jobs

700 manufacturing facilities in Europe
85% operated by SMEs
€11,8 billion paid in employment costs (of which **€5,3 billion** in labour taxes).

The concentration of largest manufacturing facilities is in France, Germany, Italy, Poland, Spain and the UK.

One of Europe's hidden "motors of innovation"

THE DRIVE TO INNOVATE

Innovation is the most important driver of value-added in the industry. Our commitment to innovation is founded in our vision of a sustainable future for all. Significant innovation occurs within Europe, with more than 15 major innovation centres in Europe owned by companies in the industry.

INVESTMENT IN INNOVATION

The industry as a whole typically invests 2-3 % of turnover in R&D.

INNOVATION BENEFITS SUSTAINABILITY

The industry has made noticeable changes in the past two decades in order to lower its environmental footprint and increase the efficiency of its products. Several initiatives are particularly noteworthy:

1. New and improved formats – compaction and concentrated forms

CONCENTRATED PRODUCTS

LEADS TO

OPTIMAL USE OF RESOURCES AND SIGNIFICANT SAVINGS IN PACKAGING AND TRANSPORT

2. New and improved technology – enabling low temperature washing

ENZYME TECHNOLOGY

LEADS TO

WASHING AT LOWER TEMPERATURES WITH REDUCED IMPACT ON THE ENVIRONMENT



3. New and improved ways of cleaning – dosage control

CORRECT DOSAGE

LEADS TO

COST SAVINGS AND SAFETY

PROFESSIONAL CLEANING AND HYGIENE

UNIT DOSE TECHNOLOGY

LEADS TO

CONVENIENCE AT HOME

HOUSEHOLD CARE

INDUSTRY'S RECOMMENDATIONS TO ENABLE ECONOMIC GROWTH

This industry supports balanced political objectives which aim to unlock untapped opportunities for economic growth and competitiveness of the sector, while ensuring the protection of end-users and the environment. We have a long and proven track-record of proactive engagement and voluntary initiatives to which we remain committed. This commitment requires EU policy makers to ensure a regulatory framework which is based on the following essential principles.



1

A science-based approach

European regulations and policies should be founded on sound science and a risk-based assessment of chemicals.



2

A coherent legislative process

Stakeholders must be included in the consultation process, administrative burdens reduced, reasonable implementation deadlines set and international convergence achieved so that legislation can be implemented in Europe with, not against, industry.

3

An innovation-friendly framework

A suitable framework must be developed which fosters innovation in line with the "Innovation Principle". Europe's ability to attract investment requires a regulatory context which supports innovation.

"We call on the Commission and Member States to urgently address existing barriers."

4

A strong internal market

The license to operate needs to be facilitated for our industry through the removal of existing barriers, gold plating requirements and diverging interpretations of EU legislation to bring about greater simplification and harmonisation.

"We call on the European Commission to be the sole interpreter of EU legislation."

5

A recognition of public benefits

There needs to be a greater acknowledgement of the public health and cleanliness benefits provided by our industry, with a holistic approach that balances end-user safety, environmental responsibility and the role of ingredients.

6

Long-term commitment to sustainability

Policy makers can trust and be confident that our industry will continuously strive to deliver cleaning and hygiene solutions with a smaller footprint, contributing to the European and global agenda on sustainable development.

