

ACTIVITY & SUSTAINABILITY REPORT 2018-19

- EU PLASTICS STRATEGY & CIRCULAR ECONOMY
- DIGITALISATION OF LABEL INFORMATION
- KEY RECOMMENDATIONS FOR EUROPEAN LEADERS



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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 over 65 years.

Membership consists of 29 national associations across Europe, 17 corporate members and 11 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 €36,7 billion, directly employing 95 000 persons and 360 000 throughout 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 for 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.'S 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.'S STRATEGIC PRIORITIES



A.I.S.E.'S KEY RECOMMENDATIONS FOR EUROPEAN LEADERS

1. BUILD A STRONGER SINGLE MARKET AND ENSURE BETTER REGULATION
2. CLOSE THE LOOP ON A CIRCULAR ECONOMY IN THE EU
3. STRIVE TOWARDS AN ENHANCED INSTITUTIONAL FRAMEWORK FOR POLICY-MAKING IN THE EU

Download A.I.S.E.'s full recommendations on www.aise.eu/publications



PRESIDENT AND DIRECTOR GENERAL'S MESSAGE



The past year has been particularly important for European industry as a whole, including the detergent and maintenance products industry. We have followed with a very attentive eye recent developments and internal threats to the European Union such as the ever-present anti-EU sentiment in several EU Member States, and its unfortunate consequences which threaten two of our industry's core principles of a strong Internal Market and necessary business predictability.

However, the picture is not completely bleak. The European elections of May 2019 should provide change and a renewed sense of trust in the EU institutions. It is an ideal time to take stock of how our industry has moved forward, but also how regulators have fared in their public service mission.

A CALL FOR AN INDUSTRY-FRIENDLY FRAMEWORK

Under the Juncker Commission, A.I.S.E. welcomed several REFIT initiatives launched in the field of chemical legislation aimed at removing red tape and lowering overall costs for businesses. A strong and ambitious EU agenda for sustainability and the Circular Economy has also helped companies maintain a competitive advantage in the global market. Our industry, however, continues to have great difficulties with compliance costs and administrative burdens, specifically in relation to the implementation of some key pieces of legislation such as the EU Regulations on Classification, Labelling and Packaging (CLP) and Biocidal Products (BPR).

To help address existing concerns, A.I.S.E. called in 2018, as part of a coalition of more than 120 European industry sectors ('Industry4Europe'), for a stronger focus to be given by the next European Commission to competitiveness and innovation policies. Industry is looking to regulators to help address one of the main remaining challenges of the EU: the completion of the EU Single Market for goods, services, people and capital. This great success of the EU, now 25 years in existence, must continue to be protected and reach its full potential.

TAKING ADVANTAGE OF DIGITALISATION OPPORTUNITIES

In addition, opportunities exist to adapt over-crowded and hardly understood detergent labels as part of the recent Fitness Check of EU chemicals legislation focusing on CLP and the upcoming review of the Detergents Regulation. It may seem obvious, but still needs to be underlined, that European consumers deserve and will undoubtedly benefit from clearer on-pack labels.

Redundancies, overlaps and duplications in on-pack information exist due to the merging of legal requirements stemming from different pieces of legislation. As these do not bring any added value to ensure safe use, A.I.S.E. has called for these issues to be addressed. This is a typical case of 'less is more' where a mindset shift is required by EU regulators. Information required to safely use a product must remain on the label, while non-essential elements could be made available through other means.

With this in mind, A.I.S.E. is pursuing a strong digitalisation agenda. The opportunities for digitalisation for our sector were publicly discussed during our annual Cleaning & Hygiene Forum in December 2018, where industry views, consumers' expectations and global (UN) and EU regulatory expectations were debated. We hope to build on these

fruitful discussions with the next European Commission to achieve a positive outcome for consumers, industry, and society at large.

CLOSING THE LOOP WITH A FOCUSED SUSTAINABILITY AGENDA

A.I.S.E. has also directed its activities of the past 12 months on continuing to deliver on its strong sustainability agenda. Our industry is committed to closing the loop on a truly Circular Economy by taking all phases of the lifecycle of detergents and maintenance products into consideration, adapting sourcing methods, production and business practices, and end-of-life management to help reduce the impact on the environment. Reporting from the industry's Charter for Sustainable Cleaning shows 40% less CO2 emissions, 33% less energy use and 32% less packaging used since 2006. In the area of social responsibility, our recently published Industry Guidance on Corporate Social Responsibility will support all companies, especially SMEs, in implementing CSR practices into their management system.

PLASTIC PACKAGING - A KEY CONTRIBUTOR TO A CIRCULAR ECONOMY

One of the biggest challenges we face today is ensuring that society's reliance on plastics does not come at a cost to the environment or human health. A.I.S.E.'s plastic packaging initiative - opened in January 2019 - sets ambitious targets for the uptake of recycled plastics in our packaging and ensuring all plastic packaging for household detergents is fully recyclable, reusable or compostable in the future. This would mean that plastics could theoretically be recycled and used indefinitely. Valuable consumer engagement and collaboration with the recycling industry therefore becomes crucial. Six household care companies, representing over 60% of detergent manufacturers' market in Europe, are already committed to our new initiative. This publication includes a special 4-page feature explaining how years of innovation and industry-wide voluntary commitments directly contribute to this goal. We hope you find it interesting.

A.I.S.E. has a reputation for being a proactive association, thanks to the active engagement of our members, and we will continue so if we continue to embrace the challenges ahead. We remain agile but focussed to be impactful in everything we do.

We welcome discussion with all our stakeholders on the priorities laid out in this activity report and look forward to our continued collaboration.

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

Handwritten signature of Arndt Scheidgen in black ink.

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

Handwritten signature of Susanne Zänker in black ink.

A.I.S.E. MEMBERSHIP (AS OF JUNE 2019)

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.

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ORDINARY
26

29

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3

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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.

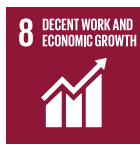
For more information on how to become an A.I.S.E. member, please get in touch with christine.boudet@aise.eu or www.aise.eu.

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

17

CORPORATE MEMBERS

11

ASSOCIATE MEMBERS

INDUSTRY'S RECOMMENDATIONS TO EU POLICY MAKERS



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

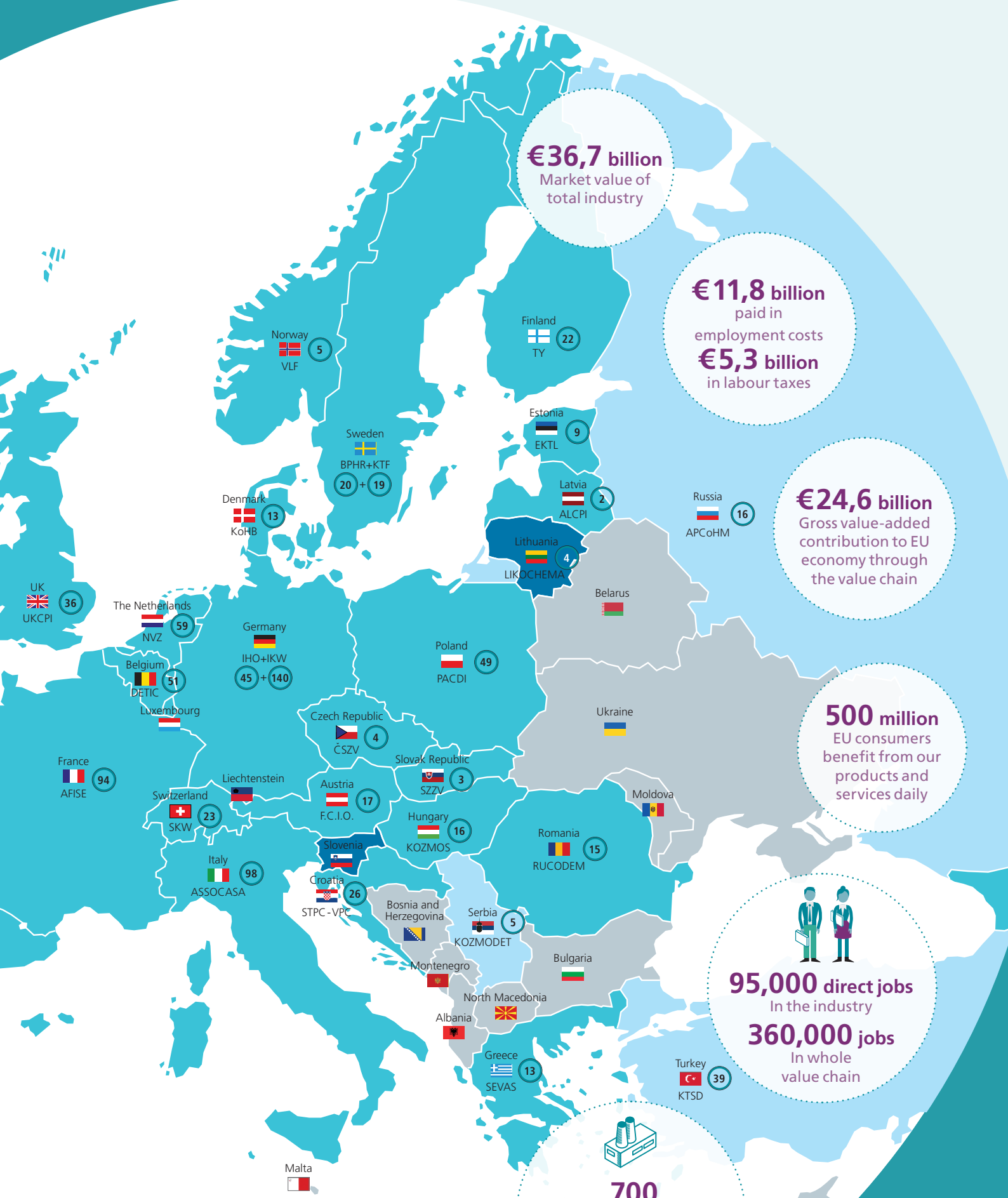
- A SCIENCE-BASED APPROACH
- A COHERENT LEGISLATIVE PROCESS
- AN INNOVATION-FRIENDLY FRAMEWORK
- A STRONG INTERNAL MARKET
- A RECOGNITION OF PUBLIC BENEFITS
- LONG TERM COMMITMENT TO SUSTAINABILITY

Ireland
ICDA 4

Portugal
AISDPCL 45

Spain
ADELMA 113





€36,7 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



Jobs, Growth & Investment

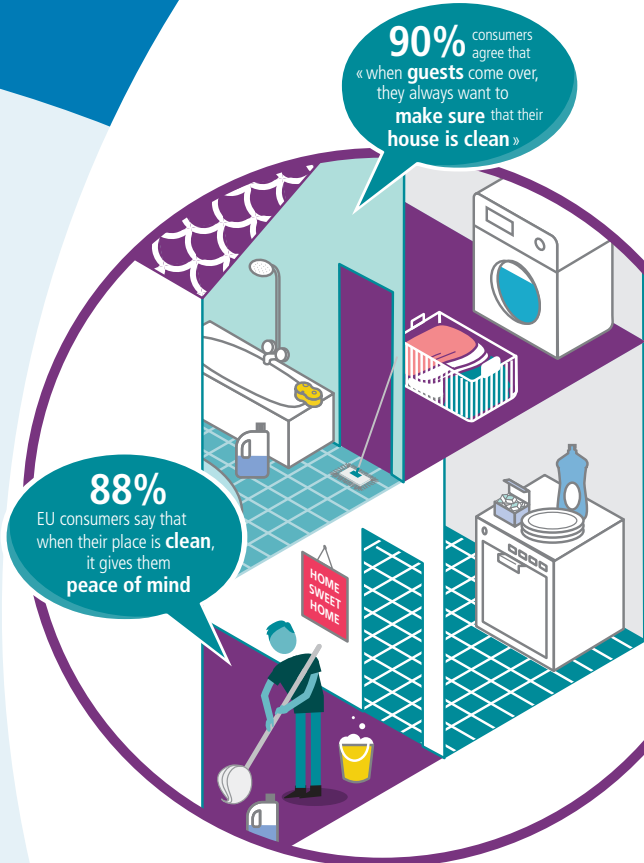
3 GOOD HEALTH AND WELL-BEING

8 DECENT WORK AND ECONOMIC GROWTH

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



AT HOME
€29,1 BILLION
MARKET
VALUE

KEEPING OUR HOMES CLEAN AND ENSURING OUR WELLBEING

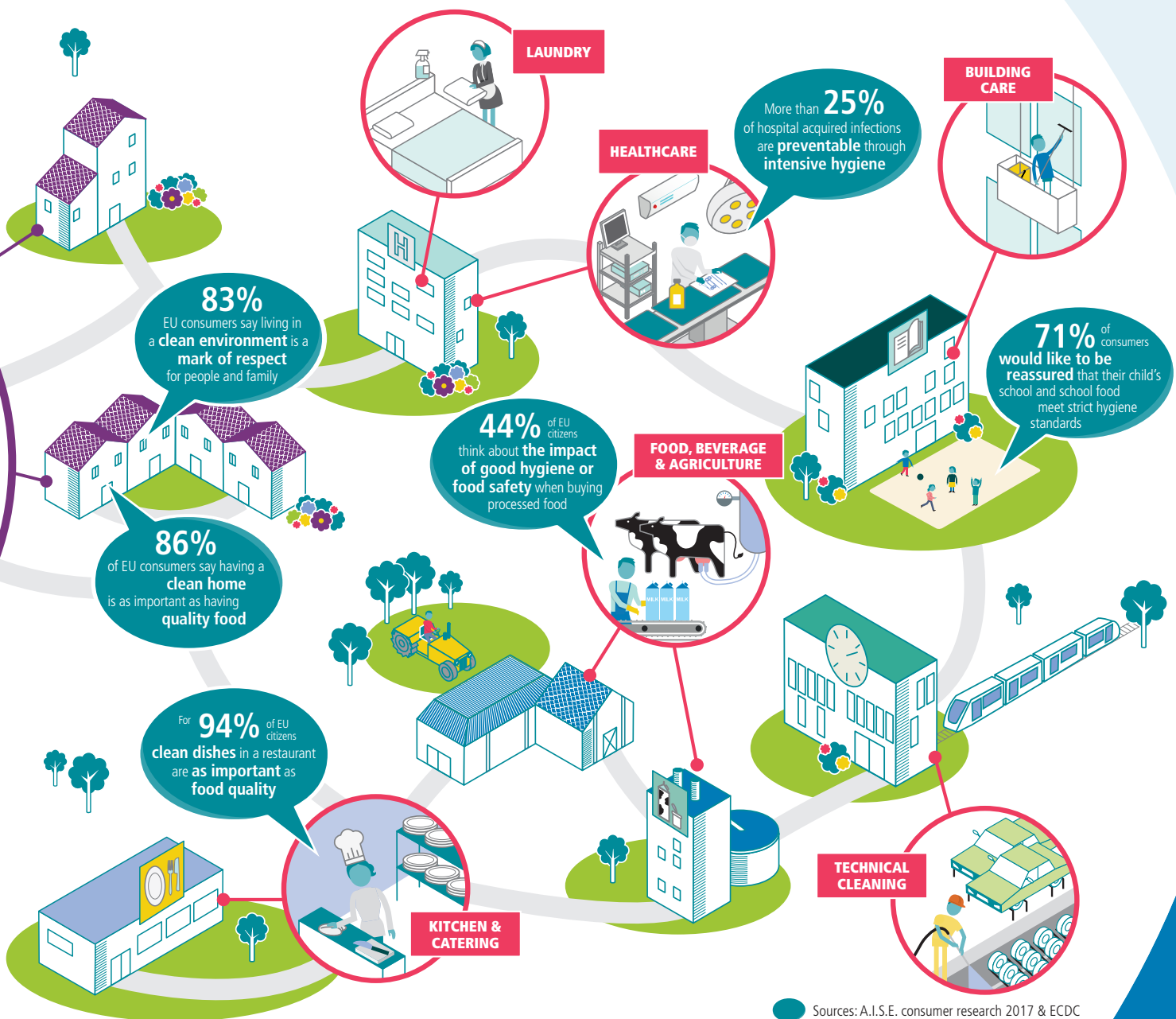
**€36,7
BILLION**
MARKET VALUE
2018

HOUSEHOLD CARE	LAUNDRY CARE	SURFACE CARE	DISHWASHING	MAINTENANCE PRODUCTS	BLEACHES	TOTAL
MARKET VALUE 2018 (BILLION €)	13,6	6,4	4,5	4	0,6	29,1
MARKET SHARE (%)	46.7	22.1	15.3	13.7	2.2	100
GROWTH (%) 2018 vs. 2017	1.1	1.9	1.3	1.7	-0.3	1.4

Source: Euromonitor (EU 28 + CH + NO)

FUNDAMENTALLY SUSTAINING SOCIETY WITH PROFESSIONAL CLEANING SOLUTIONS

OUTSIDE THE HOME
€7,6 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 2018 (BILLION €)	1,9	1,5	1,5	1,2	0,8	0,7	7.6
MARKET SHARE (%)	24.7	20	19.3	15.7	10.9	9.4	100
GROWTH (%) 2018 VS. 2017	4	8.5	4.4	-1.2	2.8	1.5	3.7

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

3 SUSTAINABLE DEVELOPMENT

STEERING INDUSTRY'S SUSTAINABILITY PROGRESS THROUGH IMPACTFUL PROJECTS



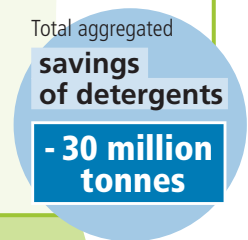
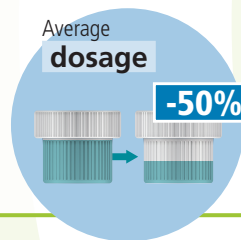
BIO-BASED MATERIALS GUIDANCE (>2019)

- Industry guidance developed with external stakeholders' input
- Responsible sourcing and management of raw materials
- Companies strive to maximise the use of sustainably sourced bio-based materials, where this is more sustainable than fossil resources



COMPACTION PROJECTS (>1997)

- Product concentration coupled with adequate consumer information
- Various industry-led initiatives, leading to a reduced environmental impact
- Accompanying consumer education on adequate dosage



EU PRODUCT ENVIRONMENTAL FOOTPRINT (PEF) (2014-2019)

- A.I.S.E. pilot project for household liquid laundry detergents
- Methodology based on harmonised life-cycle assessment
- Common approach across all industries to focus on most impactful parameters
- Pilot ended with release of PEF category rules in March 2019
- Accompanying A.I.S.E. guidance indicates that PEF methodology is a good tool for internal priority setting to improve a product's footprint, but needs further development before enabling accurate B2C use and comparison of products



SUSTAINABLE USE CAMPAIGNS (>1997)

- Use phase can be a significant part of the environmental footprint
- Consumer engagement to change habits is critical
- Common industry tips and panels for sustainable use promoted on billions of packs
- Central consumer portal via www.cleanright.eu



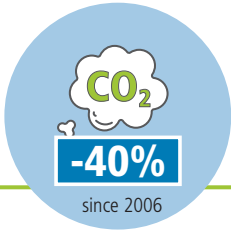
TIPS FOR SAVING WATER, ENERGY, CO₂ AND MONEY

 <small>Avoid underfilling the machine</small>	 <small>Use the dosing instructions</small>	 <small>Wash at low temperature</small>	 <small>Save packaging- recycle or refill</small>
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WWW.CLEANRIGHT.EU

CHARTER FOR SUSTAINABLE CLEANING (>2005)

- Industry flagship initiative driving sustainable production, design & consumption
- Voluntary initiative, open to manufacturers and distributors
- Independent verification and annual KPI reporting
- Membership of more than 230 companies-large majority of the market



A.I.S.E.'S ACTIVE CONTRIBUTION TO UN & EU SUSTAINABLE DEVELOPMENT PRIORITIES



The UN SDGs provide a global framework that inspires A.I.S.E.'s vision and strategy. Our industry has positively contributed to several key UN and EU sustainable development goals and for over 20 years through voluntary, proactive projects that deliver sustainable production, design and consumption.

A.I.S.E. STRATEGY ON PLASTICS (>2019)

PLASTIC PACKAGING INITIATIVE*

*For all household packaging

- Min 20% volume of recycled plastic material
- All plastic packaging
 - recyclable
 - reusable
 - compostable
- Clear targets to be achieved by committed companies
- Vast majority of the household market already on board
- Collaboration with value chain and recyclers



Global Commitment

A.I.S.E. official partner

INDUSTRY GUIDANCE ON SUSTAINABLE PLASTIC PACKAGING DESIGN



CORPORATE SOCIAL RESPONSIBILITY GUIDANCE (>2019)

- New Industry guidance developed with external stakeholders' input
- Specific focus on social aspects (human rights, labour practices etc.)
- Practical support for companies including self-evaluation tool

LEADING INDUSTRY SUSTAINABILITY INITIATIVES

This past year A.I.S.E. has continued to lead progress in measuring and reducing again our industry's environmental footprint, guiding social responsibility, tackling use of recycled plastic in packaging and promoting a circular economy, aligned with EU policy priorities and the UN Sustainable Development Goals.

Pursuing a holistic approach to sustainable progress via our Charter for Sustainable Cleaning



A.I.S.E.'s long-established flagship sustainability initiative, the Charter for Sustainable Cleaning, continues to promote and demonstrate measurable progress across the industry on key measures of sustainability.

Not resting on our laurels, work to optimise the Charter is underway and is due to be completed in 2019. Among the improvements at company and product level the Charter online platform will be revamped and relaunched, both to make it more accessible to the public and to make the use of technical tools and benchmarking easier and more intuitive for Charter members. Read more: www.aise.eu/charter

Promoting industry CSR



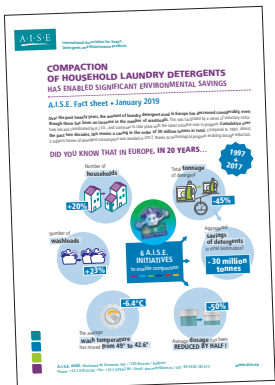
In keeping with a long track record of proactive work towards sustainable development, the industry sector is positively contributing to the global Sustainable Development Goals (SDGs), which provide inter alia a conceptual framework on Social Responsibility. A.I.S.E. also supports the EU strategy on CSR, and it is in this spirit, that A.I.S.E. launched in February 2019 Industry Guidance on Corporate Social Responsibility. The Guidance and accompanying toolkit, developed together with CSR Europe, focuses on the industry's social responsibility in four areas of direct relevance to the industry: human rights, labour practices, fair operating practices and community involvement & development. It includes detailed recommendations, resources and a self-evaluation tool intended to help all industry players, especially SMEs, to implement and manage a social responsibility programme as part of their overall sustainable development policy. Read more: www.aise.eu/csr



HIGHLIGHTS FROM CHARTER 2018 KPIS

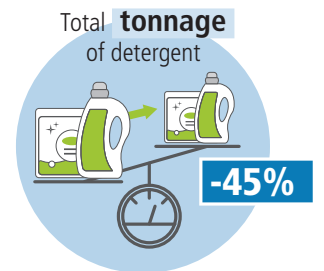
<p>230 MEMBERS</p> <p>113 distributors & 117 manufacturers</p> <p>11.1 million tonnes of production covered by Charter</p> <p>~10% increase in companies reporting KPIS vs. 2017</p>	<p>ACHIEVEMENTS SINCE 2006:</p> <p>40% less CO₂ emissions per tonne of production</p> <p>33% less energy use per tonne of production</p> <p>32% less packaging</p>
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Promoting resource-efficiency through compaction



It is now two decades since the first industry-wide detergent compaction project was launched. Over this period, through a series of six voluntary industry initiatives, the total detergent consumption in Europe in volume has dropped by 45%, despite an increase in the number of washloads by almost one quarter in European households. On average, dosage of household laundry detergents has been reduced by half. These achievements have been reached through industry-wide innovation in the optimal use of ingredients and packaging, leading to reduced transport, savings in packaging and reduced CO₂ emissions.

The two most recent projects to compact laundry detergents together brought dosage down to a maximum of 75 g/wash and 115 ml/wash. Detailed close-out reports on how these achievements were reached, as well as an overview of the 20 years of compaction, have been published on the A.I.S.E. website. The PREP-L2 project to reduce liquid detergents dosage concluded in 2018 and results will be reported in due course. Read more: www.aise.eu/preps



SPECIAL FEATURE

A.I.S.E. AND THE EU PLASTIC STRATEGY

OUR ACTIVITIES TO CONCRETELY SUPPORT THE EU VISION

Plastics are key in today's society and provide many benefits, such as light weight packaging for example. Yet, their recovery is still very low compared to their potential. In addition, littering and recent forms of leakage into the environment make us all-whether citizens, manufacturers or politicians - part of the problem, but also part of the solution...

In January 2018, the European Commission published its European Strategy for Plastics in a Circular Economy; this followed the broader EU Action Plan for a circular economy released end 2015.

This brochure provides an overview of the concrete activities that the detergents and maintenance products sector has undertaken to support this strategy, in close interaction with all stakeholders in the value chain at EU and national levels, to achieve a truly sustainable and circular use of plastics in Europe.



A VISION FOR EUROPE'S NEW PLASTICS ECONOMY

A smart, innovative and sustainable plastics industry, where design and production fully respects the needs of reuse, repair, and recycling, brings growth and jobs to Europe and helps cut EU's greenhouse gas emissions and dependence on imported fossil fuels.

Extract from EU Commission Communication, January 2018

Plastic packaging - a key contributor to a Circular Economy

A.I.S.E. is committed to achieving sustainable development through a circular economy. This can only be achieved when all the phases of a product lifecycle are considered, seeking continuous improvement in efficient designs and use of packaging materials, as well as education of consumers on sustainable consumption. A.I.S.E. supports the development of a strong market for secondary raw materials that will ensure the availability of high quality for such materials. To be successful, it is key that the whole value chain is engaged in the process.

A.I.S.E. contributes to a circular economy of packaging with the following initiatives:

Voluntary industry initiatives by A.I.S.E. on:

- Plastic packaging including targets by 2025, completed by guidance for sustainable design and regular reporting
- Charter for Sustainable Cleaning including optimal product and packaging design criteria
- Compaction of household laundry detergents
- Consumer engagement notably via on pack guidance for recycling

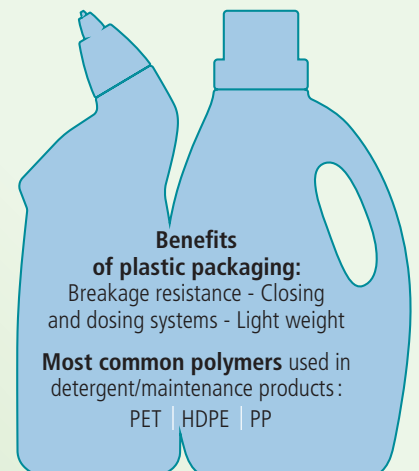
Partnership with the Ellen MacArthur Foundation's New Plastics Economy Global Commitment

Contributions to notably the EU Circular Plastic Alliance on design and consumption

Financial contributions and support by members of our network to the various EPR schemes across the EU Member States, and close dialogue with local authorities through our National Associations

To view details on each of these initiatives as well as progress, please consult:

www.aise.eu/packaging



Benefits

of plastic packaging:

Breakage resistance - Closing and dosing systems - Light weight

Most common polymers used in detergent/maintenance products:

PET | HDPE | PP





Packaging is key to avoid product leakage, to ensure safe use, to protect products during transport and to enable correct dosage.

A.I.S.E. calls on the European and National Authorities to:

1. **Promote innovation** (e.g. EPR modulated fees and economic incentives for the uptake of secondary raw materials, new technologies) cooperating together to secure a shift to a circular economy)
2. **Support infrastructure and value-chain collaboration** (e.g. between manufacturing companies, collection systems, recyclers, authorities)
3. **Secure legal certainty and essential requirements** (e.g. on the concept of "recyclability") **and a truly Single Market and harmonised approach for plastics strategy and legislation**

FOR A CIRCULAR USE OF PLASTICS ACROSS THE LIFE CYCLE: A.I.S.E. & its members lead sustainable design initiatives and science-

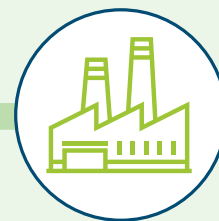
Legend

-  A.I.S.E. voluntary initiative
-  A.I.S.E. partner
-  Industry contributor
-  EU policy initiative

SOURCING



MANUFACTURING



PLASTIC PACKAGING

(primary, secondary, tertiary)



PLASTIC PACKAGING

Targets by 2025 for the
20% recycled content; all plastic packaging

**EU COMMISSION
CIRCULAR PLASTIC ALLIANCE**

**A.I.
GUIDE**

CHARTER FOR SUSTAINABLE CLEANING (> 2005)



PACKAGING DESIGN CRITERIA:

- Maximum packaging weight/dose
- All packaging to be recyclable (with 2020 update)
- KPI reporting use of packaging material

COMPACTION

COMPACTION
OF LAUNDRY DETERGENTS

=
reduction of dose

-50% in 20 years

SINGLE USE PLASTICS



**SINGLE USE PLASTICS
DIRECTIVE (> 2019)**

DETERGENT INGREDIENTS



- Microplastics
- Microbeads



**WORK WITH ECHA ON DEFINITION OF MICROPLASTICS &
CONTRIBUTION TO VARIOUS CONSULTATIONS (> 2017)**

VOLUNTARY PHASE OUT OF MICROBEADS (BY COMPANIES)

MICROPLASTICS RELEASE



(washing of synthetic textiles)

based approaches with all stakeholders

DISTRIBUTION



USE



END-OF-LIFE



INITIATIVE (>2019)

household sector:
to be recyclable, compostable, reusable

S.E.
ANCE

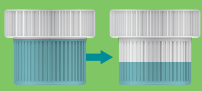


Global
Commitment

WORK WITH VALUE
CHAIN PARTNERS,
RECYCLERS AND
AUTHORITIES

CONSUMER ENGAGEMENT (>1997)

PROJECTS (>1997)



Less packaging
=
Less CO₂ emissions



Save packaging -
recycle

Tips on billions of packs
www.cleanright.eu

EXTENDED PRODUCER RESPONSIBILITY
(EPR) schemes in various EU Member
States for packaging recovery



- Millions of € invested by our industry **in EPR schemes**
- Work with national authorities



CONSUMER ENGAGEMENT (>2016)
Do not flush icon

AD HOC EPR SCHEMES FOR
SINGLE USE PLASTICS (>2020)



A·I·S·E

CIRFS
EUROPEAN MAN-MADE
FIBRES ASSOCIATION



EURATEX
THE EUROPEAN APPAREL
AND TEXTILE CONFEDERATION

FESI
Federation of the European
Sporting Goods Industry

COALITION ON MICROPLASTIC RELEASE FROM THE WASHING OF SYNTHETIC TEXTILES (>2018)



Single-use plastics - Engaging consumers is key

The product category in scope of the Single-Use Plastics Directive is cleaning wet wipes intended for consumers. A.I.S.E. considers education of consumers plays a central role in addressing the littering of European beaches and ensuring these products are not flushed down the toilet or littered outside the home. To this end, various member companies already use the "Do Not Flush" symbol on packs, developed jointly with EDANA. Additional legal requirements should make sure to take on board industry's know-how in terms of consumer education and nudging. These measures can contribute to solving the issue, but the burden on industry should be proportionate, and supported in its efforts by local, national, and European authorities.

Microplastics - Our sector is a minor contributor but keen to act in a responsible and a proportionate way

New sources of plastic leakages in the environment – via microplastics and microbeads from various origins – are a serious issue. A.I.S.E. and the detergent and maintenance products sector have been keen to contribute to the various consultations proactively and want to act responsibly on this topic and in a proportionate way. Political discussions and science evidence are evolving at a very fast pace. A.I.S.E. shares the following position:

- Scientific evidence clearly indicates that the vast majority of microplastics present in the world's seas and waterways derives from the breakdown of larger plastic materials, e.g. secondary microplastics from plastic bags, tyres, synthetic fibres etc.
- The detergents and maintenance products sector traditionally makes limited use of materials that could qualify as microplastics according to the new definition provided in the draft ECHA restriction. This draft definition is very broad and we believe that it actually targets several materials going beyond the scope of microplastics prevention and pollution. A.I.S.E. is still assessing the related consequences for its sector.
- As regards microbeads, our sector has already proactively substituted them and the residual quantities are very low as alternatives have been found (cf Case study 1).
- As regards microplastic release into the aquatic environment during the washing of synthetic textiles, A.I.S.E. is a founding member of a cross industry agreement that has been acknowledged by the Commission's EU Strategy for Plastics (see below).
- For other polymers used to deliver important functions, the industry is currently assessing the scope of the restriction and the availability of alternatives (cf Case study 2). Our sector is investigating the biodegradability profiles of such substances but further analysis and R&D activities are needed at this stage before any conclusion can be reached on potential substitution.

Case study 1: MICROBEADS

In the past, specific products which needed abrasive properties (e.g. for the gentle cleaning of hard and delicate surfaces such as ceramic or glass) have used intentionally added plastic microbeads.

R&D measures and availability of alternatives (such as natural ingredients e.g. silica) have allowed a significant decrease in tonnages used due to the availability of alternatives *



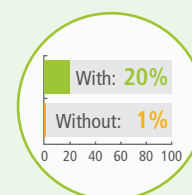
- ▶ **Industry supports the phase-out of microbeads as an abrasive by 2020 as proposed by ECHA.**

* Source: A.I.S.E. survey 2018, with companies representing about 70-75% of the total EU A.I.S.E. market

Case study 2: ENCAPSULATED FRAGRANCES

Fragrances are key for consumers when choosing laundry detergents. Perfume microcapsules were developed to get perfume material on fabrics in a more effective way, thereby reducing waste through the wash cycle.

- This contributes to a reduced environmental discharge of perfume material (30% less perfume) in line with the EU Commission's strategy for the non-toxic environment and enables cost savings for consumers.
- Only **1%** of the perfume oil added to a detergent, and 10% in fabric enhancers survive the washing, rinsing and drying process. In contrast, encapsulated perfumes are retained at much higher levels: **20%** (detergents) and 50% (fabric enhancers) is retained on fabrics when added as an encapsulated perfume.
- Alternatives to perfume encapsulate technologies in laundry applications may result in substitutions with a larger environmental footprint (more perfume, inefficient pro-perfume carriers)
- The use of encapsulated fragrances results in a significant reduction in washes (clothes stay fresher for longer). This helps to achieve a greater reduction in the synthetic fibres released into the environment than encapsulating polymers potentially affected by the restriction.
- ▶ **Adequate alternatives are not yet available. The potential ban of such ingredients could result in a loss of performance and an environmental burden shift; it should therefore be considered carefully or derogations should be granted.**



Perfume oil added to a detergent that survives the wash process, with and without encapsulated fragrances

A.I.S.E. calls on the European and National Authorities to ensure that our sector's contribution to the issue on microplastics is proportionate to the actual impact caused and based on a workable definition and relevant derogations, taking all parameters into account including potential environmental burden shifting threats and loss of performance.

Joint research on release from synthetic textiles during washing

A.I.S.E. participates since early 2018 – together with four other European industry associations – in a voluntary initiative related to secondary microplastics. This "Cross Industry Agreement" supports the need for further investigation and a better understanding for the prevention of microplastic release into the aquatic environment during the washing of synthetic textiles together with a community of researchers and scientists. It aims to find feasible solutions based on science and research, which can effectively be applied. Its three objectives are to define a test method, share knowledge and support industrial research.



LEADING INDUSTRY SUSTAINABILITY INITIATIVES

Contributing to a Circular Economy

BIO-BASED MATERIALS

The Bio-based Taskforce is developing A.I.S.E. guiding principles for the development and use of bio-based materials: following stakeholder consultation, these guidelines are expected to be published in June 2019. During 2018, collaboration with ERASM enabled A.I.S.E.'s work in this area to be shared with value chain partners during an ERASM workshop on bio-based surfactants and their applications in September. A.I.S.E.'s Francesca Angiulli also presented this work at a training run by the Belgian national association DETIC on bio-sourcing and other tools for a circular economy.



ERASM



ERASM, A.I.S.E.'s joint research platform with CESIO, organised a workshop on bio-based surfactants, following the publication of a new European standard on bio-based surfactants. The event was open to the entire value chain, from raw material suppliers to end-product manufacturers, industry associations and consumers organisations. ERASM continues to carry out scientific research on the impact of surfactants on the environment and human health.

Read further: www.erasm.org

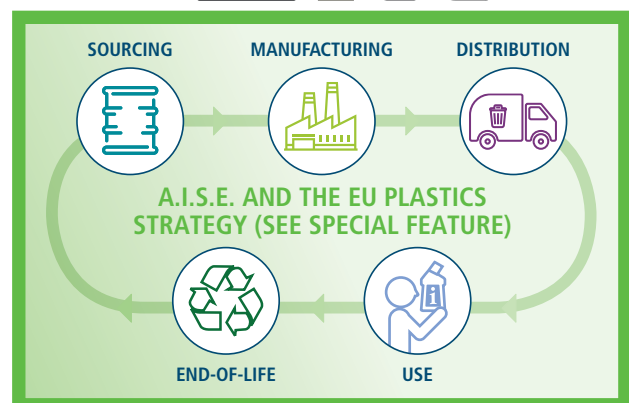
A CIRCULAR USE OF PLASTICS ACROSS THE LIFE CYCLE

A.I.S.E. is committed to achieving sustainable development through a circular economy and by reducing the environmental footprint all along the life cycle of detergents and maintenance products and is fully supportive of the Commission's Strategy for Plastics in a Circular Economy published in January 2018.

Read about the concrete steps that our sector is taking to to achieve a truly sustainable and circular use of plastics in the special insert on plastic packaging included in the centre of this report.

"It is great to see industry associations like A.I.S.E. endorse the vision of a circular economy for plastics and inspire their members to take action towards it...the change needed to eliminate plastics waste requires collaboration along the entire value chain"

Sander Defruyt, Ellen MacArthur Foundation



Completing the EU Product Environmental Footprint (PEF) pilot

In March, A.I.S.E. concluded its PEF pilot project with the release of a guidance to industry on the appropriate use of the PEF Category Rules for household liquid laundry detergents.

Since 2014, A.I.S.E. participated in the pilot project jointly with the European Commission and various stakeholders. The outcome of this pilot is the PEF Category Rules, which aim to provide specific guidance for the calculation of the environmental footprint of individual products, with focus on the most impactful parameters in a product's life-cycle.

A.I.S.E. will continue to contribute actively and constructively to the development of meaningful and effective lifecycle-based sustainability schemes as well as voluntary sustainability initiatives.

"The PEF pilot was a good exercise for A.I.S.E., but many questions remain. Whilst PEF category rules can be very useful for companies to screen, prioritise and steer internal product eco-design - several impact assessment methods, which are used for the calculation of a PEF, are not yet ready to allow accurate comparative, detailed assessment at product level and thus the method is not mature for in-market communication."

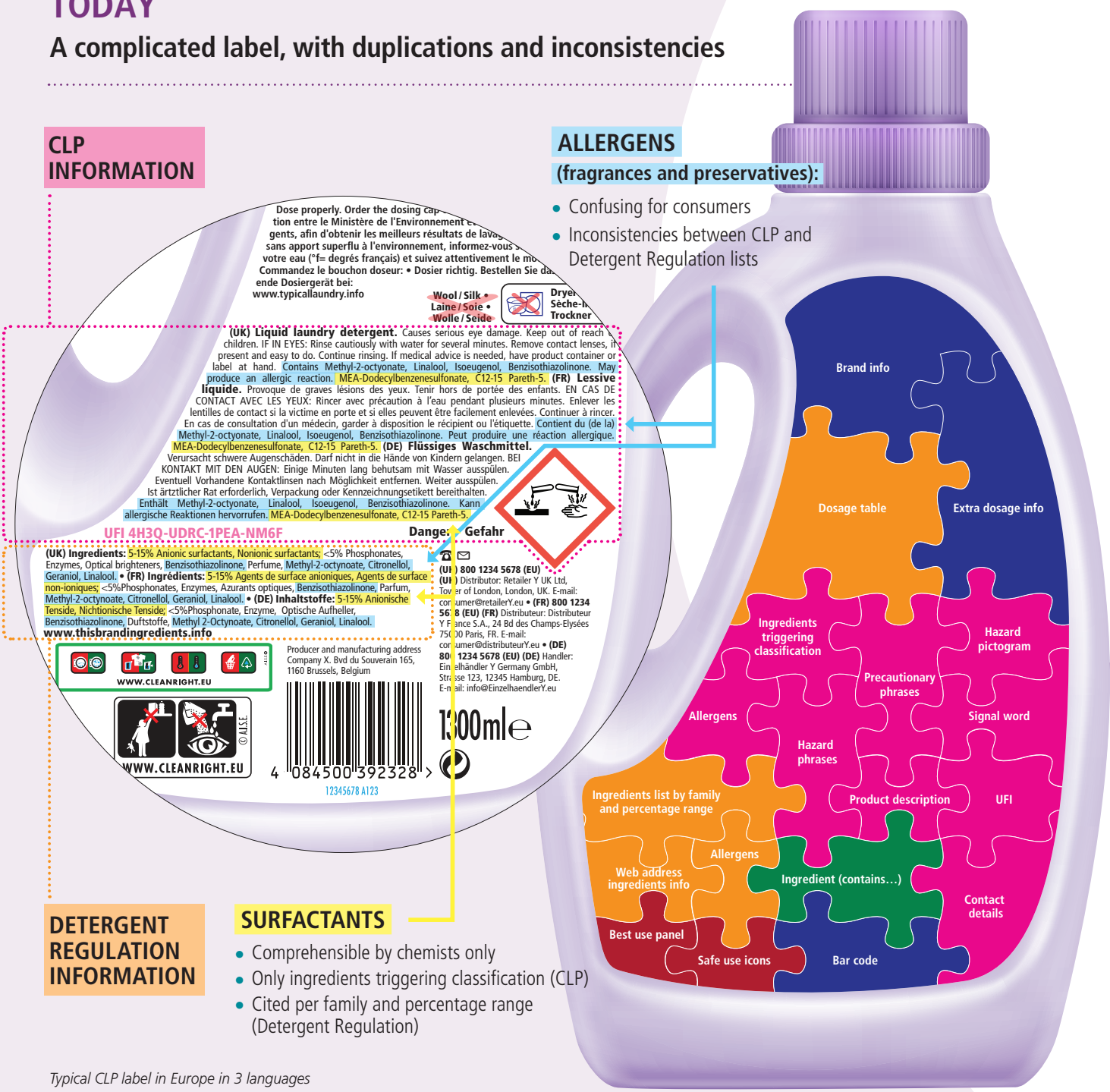
Susanne Zänker, A.I.S.E.

4 REGULATORY AFFAIRS

IMPROVING CONSUMER RELEVANCE THROUGH DIGITALISATION AND SIMPLER LABELS

TODAY

A complicated label, with duplications and inconsistencies



CLP INFORMATION

Dose properly. Order the dosing cap...
 (UK) Liquid laundry detergent. Causes serious eye damage. Keep out of reach of children. IF IN EYES: Rinse cautiously with water for several minutes. Remove contact lenses, if present and easy to do. Continue rinsing. If medical advice is needed, have product container or label at hand. Contains Methyl-2-octanoate, Linalool, Isoeugenol, Benzisothiazolinone. May produce an allergic reaction. MEA-Dodecylbenzenesulfonate, C12-15 Pareth-5. (FR) Lessive liquide. Provoque de graves lésions des yeux. Tenir hors de portée des enfants. EN CAS DE CONTACT AVEC LES YEUX: Rincer avec précaution à 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. En cas de consultation d'un médecin, garder à disposition le récipient ou l'étiquette. Contient du (de la) Methyl-2-octanoate, Linalool, Isoeugenol, Benzisothiazolinone. Peut produire une réaction allergique. MEA-Dodecylbenzenesulfonate, C12-15 Pareth-5. (DE) Flüssiges Waschmittel. Verursacht schwere Augenschäden. Darf nicht in die Hände von Kindern gelangen. BEI KONTAKT MIT DEN AUGEN: Einige Minuten lang behutsam mit Wasser ausspülen. Eventuell vorhandene Kontaktlinsen nach Möglichkeit entfernen. Weiter ausspülen. Ist ärztlicher Rat erforderlich, Verpackung oder Kennzeichnungsetikett bereithalten. Enthält Methyl-2-octanoate, Linalool, Isoeugenol, Benzisothiazolinone. Kann allergische Reaktionen hervorrufen. MEA-Dodecylbenzenesulfonate, C12-15 Pareth-5.

ALLERGENS (fragrances and preservatives):

- Confusing for consumers
- Inconsistencies between CLP and Detergent Regulation lists

UFI 4H3Q-UDRC-1PEA-NM6F

(UK) Ingredients: 5-15% Anionic surfactants, Nonionic surfactants, <5% Phosphonates, Enzymes, Optical brighteners, Benzisothiazolinone, Perfume, Methyl-2-octanoate, Citronellol, Geraniol, Linalool. (FR) Ingrédients: 5-15% Agents de surface anioniques, Agents de surface non-ioniques, <5% Phosphonates, Enzymes, Azurants optiques, Benzisothiazolinone, Parfum, Methyl-2-octanoate, Citronellol, Geraniol, Linalool. (DE) Inhaltsstoffe: 5-15% Anionische Tenside, Nichtionische Tenside, <5% Phosphonate, Enzyme, Optische Aufheller, Benzisothiazolinone, Duftstoffe, Methyl-2-Octanoate, Citronellol, Geraniol, Linalool. www.thisbrandingredients.info

Danger: Gefahr

(UK) 800 1234 5678 (EU) Distributor: Retailer Y UK Ltd, Tower of London, London, UK. E-mail: customer@retailerY.eu (FR) 800 1234 5678 (EU) Distributeur: Distributeur Y France S.A., 24 Bd des Champs-Élysées 75000 Paris, FR. E-mail: customer@distributeurY.eu (DE) 800 1234 5678 (EU) (DE) Händler: Einzelhändler Y Germany GmbH, Straße 123, 12345 Hamburg, DE. E-mail: info@EinzelhaendlerY.eu

DETERGENT REGULATION INFORMATION

SURFACTANTS

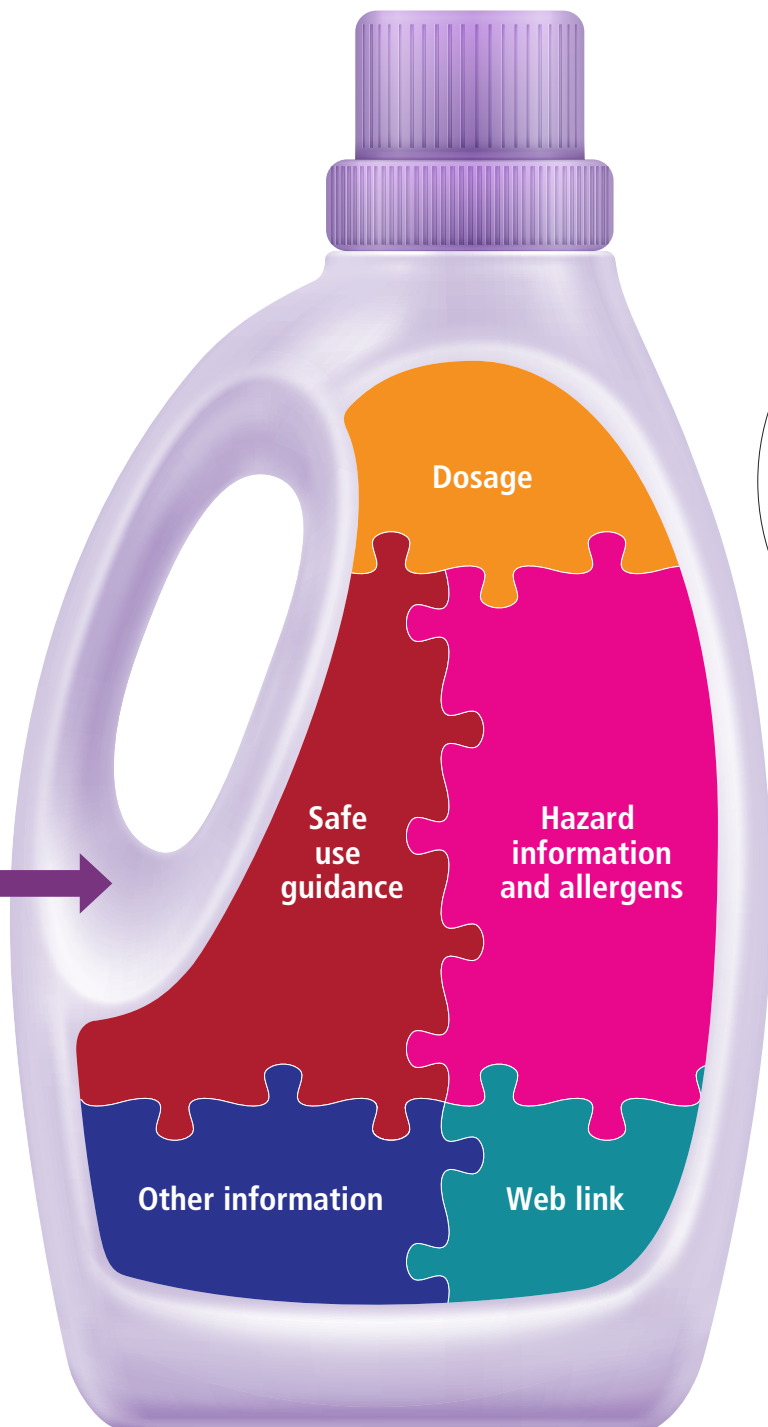
- Comprehensible by chemists only
- Only ingredients triggering classification (CLP)
- Cited per family and percentage range (Detergent Regulation)

Typical CLP label in Europe in 3 languages

IDEALLY IN THE FUTURE

A simpler label, and easily understandable information online

+ EXPANDED INFO ONLINE



THE BENEFITS OF GOING DIGITAL

Easier to :

- Read 
- Access the right language 
- Customise to individual concerns/interests
- Understand & learn more

SUPPORTING BETTER REGULATION AND SAFE USE

We are committed to proactively contribute to efficient and effective European legislation, which is essential not only for our industry to continue to compete, innovate and thrive, but also, and above all, to ensure the safe use of products. We do this in many ways, including by supporting innovation and science and safe use communication, engaging in voluntary initiatives and driving industry standards.

2018 was a milestone year on the regulatory front: the last registration deadline for REACH passed in May; the REACH and Detergents Regulation review reports published; the first biocidal products authorisations under the Biocidal Products Regulation granted; and last but not least a vast number of activities were tabled by A.I.S.E. at global level through the United Nation GHS meetings with direct influence on our EU regulatory activities.

Utilising the opportunity of the Detergent Regulation review

Early 2018, the Commission published its report on the Detergents Regulation evaluation; as a follow up to this, a Commission staff working document is now due in mid-2019. This will form the basis for a potential update of this Regulation which is key for our sector in 2019/2020.

REDUCING LABEL COMPLEXITY

A.I.S.E. continues to advocate for using the opportunity of this review to reduce complexity introduced by overlapping provisions in the more recent CLP Regulation, especially with regard to labelling. Our key messages for this review continue to call for :

1. The reduction of the on-pack labelling list of ingredients and their related concentration ranges focussing on the elements relevant for consumers (including use of innovative communication technologies, such as digital means, websites, etc.)
2. The modification of labelling requirements on allergenic fragrance substances in order to eliminate overlaps with CLP;
3. The modification of labelling requirements on preservatives in order to align with CLP and Biocidal Products Regulations and eliminate overlapping requirements;
4. The modification of the requirements on the medical data sheet in consideration of the new Annex VIII of CLP (information to be provided to Poison Centres).

HIGHLIGHTING SAFETY INFORMATION

There is common understanding on the fact that current labels do not convey safety information adequately and that there is room for all stakeholders to work on potential improvements. These could include for example:

- Greater use of icons instead of text: in this context, we were also very pleased to see that during 2018, the UN Globally Harmonised System of Classification & Labelling of Chemicals (GHS) formally adopted our "Keep away from children" icon; the icon will appear in the GHS "Purple Book" Annex in the course of 2019. A.I.S.E. is also pursuing further advocacy work to include other icons and see them potentially replace some precautionary sentences.
- Digitalisation: A.I.S.E. sees great opportunities to convey some information via online platforms. We were happy to have succeeded (together with other sectors) to ensure this was placed on the agenda of the UN GHS 2019-20 work programme and we will continue to explore how progress can be reached on such matters with all interested partners, including retailers and consumer organisations.

ENGAGING WITH UN GHS

A.I.S.E. actively engaged with UN GHS through 2018 and will continue to do so in 2019. Our long and on-going involvement, together with other industry sectors and many jurisdictions in the world, enables us to globally approach chemicals management and labelling in a consistent way.

The ambitious UN GHS 2019-20 work programme takes on board a number of A.I.S.E. suggestions, including:

- Inclusion of some of our safe use icons and potential flexible use of precautionary pictograms
- Exploration of digitalisation related to hazard communication
- Potential review of generic concentration limits for Serious Eye Damage Hazard Classification
- Common way to approach bridging principles.



Keep away from children

IMPROVING CONSUMER INFORMATION

Our industry is continually focussed on optimising communication to, and engagement with, consumers on the safe use of products, tapping into the opportunities that the digitalisation of information could bring. In 2018, we presented the results of our Better Regulation & Safe Use (BRES) project which focuses on the clarity and comprehensibility of labels to the Commission Detergents Working Group and to the European consumer organization (BEUC). This important topic was at the centre of an open and animated discussion during A.I.S.E.'s annual Cleaning & Hygiene Forum in December 2018.



WORKING TOWARDS EFFICIENT AND EFFECTIVE CLASSIFICATION LEGISLATION

Achieving proportionate hazard classification

ADVANCING IN-VITRO TESTING – A MILESTONE INNOVATION LED BY A.I.S.E.

We were delighted when, in June 2018, the OECD published the revised Test Guideline No. 438 including A.I.S.E.'s recommendations on histopathology, which can be used to classify if a detergent product causes serious eye damage. This milestone is a step towards the further acceptance of in-vitro data in the classification of detergents and cleaning products. A.I.S.E. has been preparing to follow-up this achievement by investigating an in-vitro method to classify eye irritation.

"We warmly welcome the in-vitro test method that A.I.S.E. has succeeded in realising... it would be great if the example set by A.I.S.E. were followed by other industrial partners."

Dutch national authorities



ASSESSING GENERIC CONCENTRATION LIMITS FOR SERIOUS EYE DAMAGE CLASSIFICATION



On the basis of new scientific evidence, A.I.S.E. has proposed to review the generic concentration limit used to classify mixtures for eye effects (serious eye damage). UN GHS has agreed to discuss this topic and a new work stream was added to their 2019-2020 work program. A.I.S.E., in collaboration with other sectors, will draft and present a proposal at upcoming GHS meetings.

COLLABORATING WITH EU POISON CENTRES ON EYE HAZARD CLASSIFICATION

A.I.S.E. has co-authored a scientific paper with several European Poison Centres that compares eye hazard classification and the effects following accidental exposure to detergent and maintenance products. The collaborative study confirms most accidental exposures do not lead to serious effects and that on-pack hazard classification information does not well reflect the hazard products pose to users.

Download the study: www.aise.eu/PCCstudy

CONTRIBUTING TO BRIDGING PRINCIPLES VIA DETNET

DetNet, the Detergent Industry Network for CLP Classification provides members with access to significant amounts of toxicological data (animal and non-animal) on many tested detergent and cleaning product mixtures. DetNet facilitates the application of bridging principles, weight of evidence and expert judgement to classify non-tested mixtures for eye and skin hazards.

To support DetNet users and encourage harmonised approach to classification, A.I.S.E. developed two papers in 2018-19: the first looks at the use of in-vitro test data in classifications decisions; the second on identification of eye hazards of non-extreme pH products. To support transparency, we invited Member State authorities to access DetNet. To date, more than 20 authorities from three Member States have been granted access to DetNet.

European Companies: **138** (EU + EFTA)

Active users: **268**

Mixtures classified: **> 1400**



Launched
2013

Workability of Annex VIII regarding Poison Centre reporting

Whilst harmonised Single Market regulation and improved safety standards are welcome, significant workability issues with the new Annex VIII of the Classification, Labelling & packaging (CLP) Regulation have been identified. Consequently, A.I.S.E. has been actively advocating the improved workability by revision of Annex VIII.

A.I.S.E. has proposed that the Unique Formula Identifier (UFI) be printed on product packaging or on label. If accepted, this would reduce costs and waste without detriment to user safety. In November 2018, we submitted a consolidated response to the Commission's workability study, highlighting key issues and proposed solutions. Subsequently, we engaged in further work with the study authors, participated in the Commission's workability study workshop (February 2019) and delivered multiple case studies to illustrate and support our concerns.

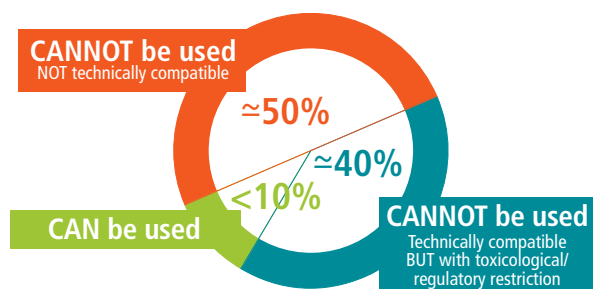
A.I.S.E. led the development of a cross-sectoral request to postpone the applicability of Annex VIII, due to unsolved workability issues. This was discussed at CARACAL meetings in November 2018 and March 2019. A draft report was circulated to stakeholders in May. A.I.S.E. will contribute to further consultations and developments in the process.

BIOCIDES: KEY FOR DISINFECTION, PRESERVATION AND INSECT CONTROL

Preservatives: A call to secure their future availability

In-can preservatives used in the detergents industry to preserve water-based detergents and cleaning products are a special case under the BPR. A.I.S.E. set up a task force on in-can preservatives and issued a fact sheet, which explains why the detergent industry relies on a limited number of preservatives, and highlights findings from the recent A.I.S.E. survey on the economic impact of potentially losing these key preservatives. A workshop took place in May 2019 in Brussels, in collaboration with the European paints association (CEPE) and in agreement with the Member States Biocides Competent Authorities, at which potential solutions to this issue were discussed. The close collaboration between our sector and preservatives' suppliers in working on this issue is a unique industry approach.

From a total of 50 active substances:



Support for the implementation of BPR

A.I.S.E. is concerned that more than five years after the entry into force of the BPR, many implementation aspects still represent a challenge for industry. In this context, we are committed to contribute as much as possible to efforts to improve the BPR process, such as Union Authorisation and development of implementation guidance. A recent example is the work to clarify the biocidal product family concept, to which A.I.S.E., together with CEFIC, actively contributed. This work resulted in March 2018 in a number of recommendations to the competent authorities; A.I.S.E. will closely follow-up the implementation of this new concept.

www.aise.eu/biocides

INSECTICIDES AND REPELLENTS WORKING GROUP

A new A.I.S.E. working group got underway in 2018 looking at the implications of the BPR for insecticides and repellents. The group is actively contributing to the development of the ECHA efficacy guidance on repellents and attractants (PT19).



REACH 2018: SUPPORTING IMPLEMENTATION

The final registration deadline for REACH in May 2018 marked a major milestone and the culmination of years of work. We continue to support the implementation of this core piece of legislation and we are committed to the REACH review actions.

Among these actions, further improving communication along the supply chain is a key focus of DUCC, in which A.I.S.E. participates. In June, DUCC published seven safe use pictograms to be included in the Safe Use of Mixtures Information (SUMIs) and, in November, A.I.S.E. held a webinar for its members on the SUMI tools, which provide simple and clear information to users in the professional cleaning industry using products containing chemicals.

A.I.S.E. reaffirmed its commitment to help achieve the improvements published in the REACH review in March 2018. We are urging the Commission to promote the work done on alternatives to animal testing, publicise the tools developed to harmonise supply chain communication and further involve downstream users in the REACH process.

In 2019 we are working on publicising our tools and enhancing communication through collaboration with EFCI (see page 19) and with ECHA and CEFIC on the 'DUCC-CEFIC joint pilot on Exposure Scenarios and communication in the supply chain'. These collaborations will build strong links and improve communication between registrants, authorities and downstream users.

DUCC

DUCC has supported the implementation of REACH since 2001, and in 2018, published an overview of the tools it has specifically developed in the past 10 years which contribute to the implementation of some of the REACH review actions. It urges the Commission to support and promote all the tools that have been developed by DUCC related to the REACH regulation.



Downstream Users of Chemicals Co-ordination group

Read more on www.ducc.eu

SECURING PROFESSIONAL CLEANING AND HYGIENE SOLUTIONS FOR SOCIETY

In 2018, our professional cleaning and hygiene (PC&H) Steering Group focussed on the priority regulatory topics of microplastics, indoor air quality, PCC reporting and classification of nitric acid. In addition, A.I.S.E. has reached out to value chain partners to collaborate on areas of common interest.

- In collaboration with the European Hospital and Healthcare Federation (HOPE), A.I.S.E. will organise an event in September 2019 dedicated to the professional cleaning and hygiene solutions in the healthcare sector, for authorities involved in the Biocides and Medical Devices Regulations.



- A.I.S.E. has also initiated a collaboration with the cleaning and facilities services industry (EFCI), many of whose members are customers of A.I.S.E. companies. As professional users of detergents and maintenance products, EFCI members share many of the same objectives as A.I.S.E. members, and information sharing has begun on topics related to sustainability, digitalisation and safe use training.



Read more: www.aise.eu/professional_cleaning

VOLUNTARY INITIATIVES, STANDARDS AND GUIDELINES

Product Stewardship Programmes

Product Stewardship Programmes (PSPs) are voluntary initiatives to promote best practice and safe design and use of particular types of products. A.I.S.E. has been running PSPs since 2007 and two are currently ongoing.

The second PSP for indoor air fresheners was launched in 2016 and A.I.S.E. has been working to promote the programme, also with the European candle association. Participating companies have committed to meet additional safety requirements and respect additional limits on the emission of certain substances. These include following the WHO limits for formaldehyde, benzene and naphthalene, committing to use safety icons and complying with CEN standards on emission safety.

A third PSP for liquid laundry detergents capsules has been underway since June 2017, building on previous iterations of the programme. Enhanced safety measures introduced include improved child-impeding closures and an advertising code of conduct. The PSP is running in parallel with the re-launched industry campaign, Keep Caps from Kids. Read more: www.aise.eu/psp

Enzymes

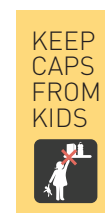
Through our collaboration with the European enzymes association (AMFEP), the A.I.S.E. Enzymes Working Group (WG) has been monitoring several topics. Of note is the process to help authorities clarify if action is required for a substance, in this case alpha-amylase. This work was recently concluded, and the result was that in reference to all the work of the Enzyme WG, it has been possible to avoid direct regulatory action. The conclusion also requested that the voluntary initiatives of the detergent industry should be replicated in other sectors. The UK authorities acknowledged the input from the Enzymes WG in creating safety posters in local languages and the webinars that were led by A.I.S.E. and their members between 2015-2016.

Collaboration between the A.I.S.E. Enzyme WG and the American Cleaning Institute (ACI) is continuing and further strengthened. The A.I.S.E. input to the ACI database on ingredients in 2018 was accepted, creating synergies between the two associations for the benefit of the membership, furthered by our decision to co-publish papers on a case-by-case basis. Read more: www.aise.eu/enzymes

The **Keep Caps from Kids** campaign was relaunched in September 2017 with a new website, an edited video and an SEO campaign to optimise and drive traffic to the site. Pilot campaigns have also been launched in 2018 in Ireland, Germany and France to reach parents and carers of young children directly through local stakeholders.

In France, our French member AFISE partnered with the French association of nurseries (Fédération Française des Entreprises de Crèches (FFEC) on the campaign, with a campaign leaflet distributed to the FFEC's 1500 member nurseries as well as in the waiting rooms of 1000 pediatricians. In Germany, IKW continued promoting safety advice for children with a targeted brochures for the German Association of the Protection of Children and a parenting journal.

See: www.keepcapsfromkids.eu



STAKEHOLDER OUTREACH

COMMUNICATIONS, ADVOCACY AND STAKEHOLDER OUTREACH

In line with our 2018-20 advocacy and communications plan, A.I.S.E. has been working over the past year to build the visibility, reputation and impact of its work, through strengthened communications, advocacy and outreach.

Internal communication

Measures to improve communications and best practice sharing across the A.I.S.E. network are also underway. We ran a number of social media training webinars throughout the year for A.I.S.E. team and member National Associations, all of which have been recorded and can be shared. An extranet tool was also launched in March 2019, to facilitate the sharing of information and knowledge across the A.I.S.E. network.

A.I.S.E. and the media



Following a stakeholder mapping exercise, the Communications Steering Group has developed a comprehensive media strategy and implemented a number of initial steps. We have re-organised the newsroom on the corporate A.I.S.E. website so our press releases and position papers are more prominent and accessible to stakeholders and the public. We are taking a more proactive approach to share information with the relevant trade media, and we are active on social media, engaging and communicating with stakeholders through the corporate A.I.S.E. LinkedIn and Twitter accounts. Please do follow us and share!



Access via www.aise.eu/home



Twitter handle: @AISEdetergents

Advocacy

In anticipation of the European elections in May 2019, we published a political manifesto in early 2019 to clearly highlight the priorities for the industry, and our key recommendations for improving the EU policy agenda.

We also engaged more proactively with stakeholders at the Commission level, on topics ranging from microplastics to labels and digitalisation and presented the industry's position at several conferences organised by the EU Commission, ECHA and the UN in 2018 and 2019 on sustainability and regulatory issues. In addition, A.I.S.E. joined the Industry4Europe coalition's call for an ambitious EU industrial strategy.



International dialogue



The information exchange with our industry partners from the International Network of Cleaning Product Associations (INCPA) (bringing together Australia, Brazil, Canada, China, Europe, India, Japan, Mexico, Taiwan and the US) continues with regular meetings and webinars to share topics of common interest. (See www.incpa.net)

Industry events and outreach

In 2018, we sought to prioritise and focus our conference activities to maximise the strategic value of this aspect of A.I.S.E.'s work. Nevertheless, our industry events and outreach calendar remained a very busy one. Some highlights include:

January 2018 - A.I.S.E. participated in the American Cleaning Institute 2018 convention, Florida

March 2018 - Sascha Nissen reported on our sustainability initiatives at Cleaning Products Europe Conference, Amsterdam

May 2018 - Arndt Scheidgen was a keynote speaker at CSR Europe's 2nd Brussels Sustainable Development Goals Summit, Brussels

May 2018 - NVZ and A.I.S.E. attended the Healthcare Cleaning Forum at InterClean, Amsterdam

June 2018 - A.I.S.E. General Assembly, Brussels

October 2018 - A.I.S.E. exhibited at the 2018 SEPAWA congress, Berlin. A special edition of the Household and Personal Care (HPC) journal issued at SEPAWA carried no fewer than four articles featuring A.I.S.E.'s work.

December 2018 - A.I.S.E. Cleaning & Hygiene Forum 2018, Brussels

December 2018 - A.I.S.E. jointly hosted the "EU Plastics Industries - Towards Circularity" event with 13 partners from the plastics value chain

January 2019 - Susanne Zänker attended the meeting of the International Network of Cleaning Product Associations (INCPA), US.



WHO'S WHO

A.I.S.E. BOARD (UNTIL JUNE 2020)

ORDINARY CORPORATE MEMBERS



Heather BARKER
RB



Jean-Paul DECHESNE
Colgate-Palmolive



Charles-François GAUDEFROY
Unilever



Ludger GRUNWALD
Ecolab



Ismaël DJELASSI
Spechim



Ad JESPERS
Diversey Europe Operations



**President
Arndt SCHEIDGEN**
Henkel



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



**Treasurer
Luis ZUNZUNEGUI**
SC Johnson



Stefan MÜLLER
Dalli

SUPPORTING CORPORATE MEMBERS

CLUSTERS OF NATIONAL ASSOCIATIONS



Giuseppe ABELLO
Greece, Italy



Ana-Maria COURAS
Portugal, Spain



Virginie D'ENFERT
France



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



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



Thomas KEISER
Austria, Germany, Hungary,
Switzerland



Philip MALPASS
Ireland, United Kingdom



Anna OBORSKA
Czech Republic, Poland,
Slovakia



Mihaela RABU
Croatia, Romania



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

OBSERVER



Thomas RAUCH
Representing the professional
cleaning & 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.

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2018 KPI PERFORMANCE

The Key Performance Indicators (KPIs) shown in the table include the results from 2018 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

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 ⁽²⁾ (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
 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 ^(1,4)	kg / % of PBO chemicals ⁵ , 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 ₂ emitted ⁽¹⁾	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 ₂ 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 ⁽¹⁾	m ³ of water (potable and non potable) consumed	1.60m ³ /t	1.44m ³ /t	1.47m ³ /t	1.59m ³ /t	1.49m ³ /t	1.40m ³ /t	1.35m ³ /t	1.44m ³ /t
 Waste ⁽¹⁾	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 ⁽¹⁾	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, MORE THAN 8 BILLION CONSUMER PRODUCTS CARRY THE CHARTER PRODUCT LOGO!

KPI highlights

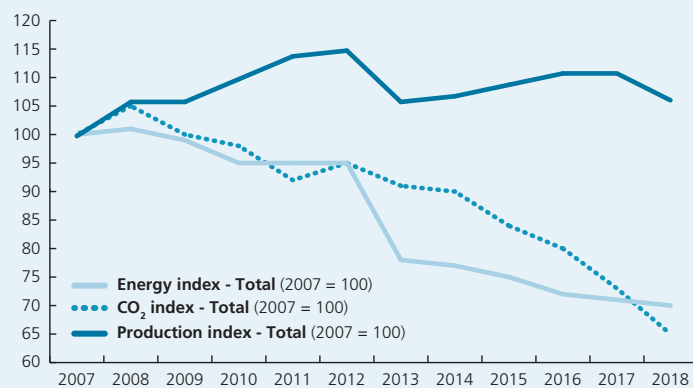
CHARTER FOOTPRINT AND PRODUCTION

112 companies submitted their KPI data. The total production tonnage covered by the Charter was 11.1 mt, equivalent to 99.5% of the total output of reporting companies in the EU+4.

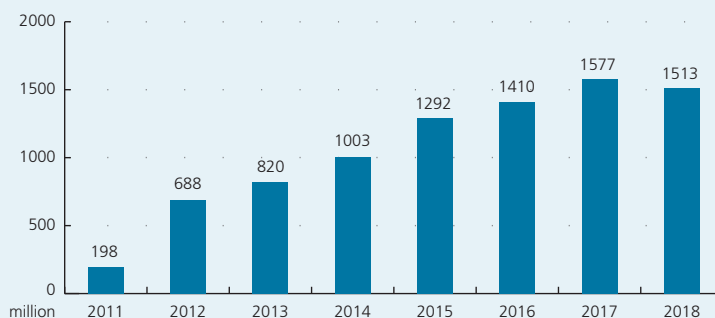
CHANGES SINCE 2006

Energy use per tonne of production is down by 33% and CO₂ emissions by 40% over the 12 years since 2006.

ENERGY USE AND CO₂ EMISSIONS DECOUPLED FROM PRODUCTION



1.5 BILLION CONSUMER PRODUCTS WITH ASP LOGO



The number of consumer products carrying the Charter Product Logo remained steady with 1.5 billion units. From the laundry category alone, 35% 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 9 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_sustainabilityreport.orb

KPI commentary at www.sustainable-cleaning.com/charter

2013	2014	2015	2016	2017	2018
93	92	100	100	103	112
185	175	183	178	180	187
94.9%	94.1%	95.3%	95.2%	94.7%	94.9%
11.1mt	11.2mt	11.4mt	11.7mt	11.7mt	11.1mt
99.6%	99.7%	99.4%	99.3%	99.5%	99.5%
9700m	11,300m	12,000m	11,700m	13,400m	14,800m
9600m	11,200m	11,900m	11,600m	13,300m	14,600m
77.6%	76.4%	73.5%	72.0%	67.5%	68.8%
2.2mt	0.3mt ⁽³⁾	0.3mt ⁽³⁾	0.4mt ⁽³⁾	0.5mt ⁽³⁾	0.4mt ⁽³⁾
1.05	0.85	0.69	0.87	1.07	0.89
721	759	788	806	838	892
525,849	686,946	650,550	600,672	540,578	495,507
1.3%	1.4%	1.5%	1.6%	1.9%	2.5%
2.4%	4.1%	4.0%	5.3%	6.9%	6.8%
95,619	84,540	64,074	64,376	83,651	90,237
5,804m	6,341m	6,659m	6,781m	6,657m	8,315m
2,804m	3,734m	3,870m	3,876m	3,689m	4,504m
2,269m	3,188m	2,635m	2,972m	2,956m	3,244m
19.0kg/t	19.5kg/t	18.2kg/t	19.9kg/t	19.0kg/t	19.6kg/t
1.9%	1.9%	1.8%	2.0%	1.9%	1.9%
0.81GJ/t	0.79GJ/t	0.76GJ/t	0.71GJ/t	0.7GJ/t	0.73GJ/t
55.6kg/t ⁴	54.3kg/t	50.0kg/t	46.4kg/t	42.5kg/t	39.6kg/t
1.30m ³ /t	1.23m ³ /t	1.23m ³ /t	1.18m ³ /t	1.16m ³ /t	1.22m ³ /t
11.0kg/t	12.6kg/t	12.4kg/t	11.7kg/t	12.1kg/t	13.5kg/t
3.0kg/t	3.9kg/t	4.1kg/t	4.3kg/t	4.2kg/t	5.3kg/t
84.3kg/t	91.4kg/t	92.6kg/t	90.3kg/t	90.2kg/t	93.0kg/t
96.5kg/KU	90.6kg/KU	88.0kg/KU	90.3kg/KU	78.8kg/KU	70.7kg/KU
221,577t	7,710t ⁽³⁾	8,444t ⁽³⁾	7,333t ⁽³⁾	10,806t ⁽³⁾	9,137t ⁽³⁾
820m	1,003m	1,292m	1,410m	1,577m	1,513m

¹ Data apply to production covered by the CSP Check. ² Water is not considered as an ingredient. ³ 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. ⁴ As to the Charter KPI reporting, 50% w/w of fragrances and all non-ionic terephthalate polymers are globally considered as PBO's, even if a relatively large portion of those are easily or inherently biodegradable. ⁵ Includes water.

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This report has been produced under the sustainable guidelines of the FSC label using recycled paper and vegetal inks.

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