INDUSTRY'S VISION

“We benefit society by contributing to the sustainable improvement of the quality of life through hygiene and cleanliness, in a constructive, competitive and innovative way.”

In practice this is done in the following ways:

• The industry develops and markets products that are essential to society.
• Cleaning and maintenance products, used in the home or professional settings, support public health and hygiene, thus improving the quality of life.
• Being highly competitive, the industry is continually innovating to meet consumer and customer needs better, through increased product performance and convenience, while ensuring human and environmental safety.
• The industry is committed to sustainability and to continually steering its progress through the sector, in dialogue with all partners and stakeholders.

A.I.S.E.’S MISSION

A.I.S.E.’s mission is to act through its network as the industry’s expert and valued voice in Europe. It ensures and maintains open dialogue with EU institutions, international organisations, NGOs, industry partners and other stakeholders. This is to enable the cleaning and maintenance products industry to achieve its vision of a sustainable future for all while improving the environment in which the industry operates.
Welcome to our annual report for 2014-15. A.I.S.E. aims to serve as the cleaning and maintenance products industry’s expert and valued voice in Europe and we are glad to share herewith some of the key projects led by our sector over the past year.

This has been a particularly important year, too: challenging in terms of the economic and financial environment and changing at the European level as a new European Commission took office following the elections in May 2014.

So it is fitting perhaps that we conducted two major surveys during this time: one, our triennial consumer habits survey and the other, our regular stakeholder perception survey. Both of these help us to ensure that, in a changing world, A.I.S.E. continues to improve its ability to add value for its industry members and be an authoritative, credible and proactive partner to all its stakeholders.

The consumer habits study showed that, in the current tougher economic climate, consumers seem to be making less effort to act sustainably themselves but demanding more of industry to take responsibility in this respect. This chimes with the stakeholder perception survey finding that the industry and A.I.S.E.’s commitment to sustainable cleaning remains highly valued by stakeholders.

Overall we are pleased with the survey findings which show that A.I.S.E. is focusing on the right priorities and that awareness of the organisation and its activities is growing.

The A.I.S.E. network has been very busy over the past year and there are quite a few highlights we would like to share with you.

The “I prefer 30°” consumer campaign has been very well received by stakeholders in 2013-14, further encouraging people to save energy by doing their washing at 30°. We also continue to promote sustainable consumption of all cleaning products both through on-pack activities and our industry cleanright.eu webportal.

Meanwhile the A.I.S.E.-led pilot project to develop and test the EU Product Environmental Footprint methodology for products in our sector has made great progress, through a joint consortium comprising companies in the sector as well as lead stakeholders; this important exercise will be a interesting way to also benchmark other approaches to drive sustainable progress notably through the A.I.S.E. Charter for Sustainable Cleaning. This key milestone project to steer progress at industry level has been in place since 2005 and gathers the vast majority of the sector, with more than 200 companies committed and involved in the KPI reporting.

In the meantime, of course, we also continued actively to support the implementation of the Biocides and Detergents Regulations, as well as REACH. The June 2015 deadline for implementation of CLP is a key milestone for all companies in our sector and demands considerable investment and preparation; we are glad to report that more than 100 companies have become member of the DetNet platform to classify and label detergent and cleaning products for skin and eye effects.

Last but certainly not least, at our Information Day in December – and also in this report – we are delighted to shine the spotlight on the professional cleaning and hygiene sector, which is an important part of our membership and makes such a vital contribution to public health and wellbeing, in any place outside the home such as schools, hospitals, public transport and factories.

Thank you all very much for your interest and support, your partnership and your engagement with the work of the A.I.S.E. network, whose vision is so relevant to us all: to benefit society by contributing to the sustainable improvement of the quality of life through hygiene and cleanliness, in a constructive, competitive and innovative way. It is the work of many and we look forward to continuing to play our part in 2015 in beyond.
ECONOMIC PERSPECTIVE

This section covers the total A.I.S.E. market value for the year 2014 for the EU 28 + Norway and Switzerland.

Total market value of the overall detergents and maintenance products industry (for both household and professional cleaning and hygiene products) for 2014 is estimated to have reached 35 billion euros.

Details for each category covered in the A.I.S.E. product portfolio can be found on www.aise.eu. Data presented with this A.I.S.E. annual publication are provided at retail sales prices for household cleaning products and at manufacturing sales price (ex-factory) for the professional cleaning and hygiene sector.

The overall total household value in 2014 based on Euromonitor International data is estimated to have reached 28.3 billion euros (28.2 billion euros in 2013*) and shows a growth of approximately 0.4% (based on fixed exchange rates).

Market value of sub-categories per main product group (Laundry Care, Surface Care, Dish Washing and Maintenance Products)

<table>
<thead>
<tr>
<th>Category</th>
<th>2014 Market Value (million €)</th>
<th>Growth 2014 vs 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laundry Care</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Powder Detergents</td>
<td>3,216</td>
<td></td>
</tr>
<tr>
<td>Liquid Detergents</td>
<td>4,181</td>
<td></td>
</tr>
<tr>
<td>Unit Doses</td>
<td>1,083</td>
<td></td>
</tr>
<tr>
<td>Fabric Conditioners</td>
<td>2,405</td>
<td></td>
</tr>
<tr>
<td>Laundry Aids, Others</td>
<td>2,735</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>13,620</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Category</th>
<th>2014 Market Value (million €)</th>
<th>Growth 2014 vs 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surface Care</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stock Care</td>
<td>4,383</td>
<td></td>
</tr>
<tr>
<td>Toilet Care</td>
<td>1,561</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>5,944</td>
<td></td>
</tr>
</tbody>
</table>

The professional cleaning and hygiene market is a stable market. In 2014, the total professional cleaning and hygiene sector value is estimated at 6.7 billion euros (6.6 billion euros in 2013).
ACTIVITY REPORT

1. SUSTAINABLE CLEANING AND END-USER ENGAGEMENT

With European elections taking place, two major new consumer campaigns launched – I prefer 30° and Keep Caps From Kids – and a number of regulatory deadlines relevant to our industry coming up, it has been another busy year for all of us at A.I.S.E. and throughout the network. In this section, we report on all those activities and more, as we pursue the twin pillars of our strategy: partnering to achieve a better regulatory framework and developing and promoting voluntary activities, for both product safety and innovation, sustainability and end-user engagement.

Sustainable cleaning is what we strive for and is essentially about sustainably made products, consumed sustainably and that contribute to a more sustainable lifestyle, helping to improve health, hygiene and wellbeing. We have a long track record of leading the industry in voluntary initiatives to deliver sustainable cleaning and this past year has seen progress on a number of fronts.

**Charter for Sustainable Cleaning**

The Charter for Sustainable Cleaning has been our flagship initiative since 2005 and aims to encourage the whole industry to undertake continual improvement in terms of sustainability and also to encourage consumers to adopt more sustainable ways of doing their washing, cleaning and household maintenance. Since the last 10 years, this is the key umbrella initiative steering progress in the sector and counts more than 200 companies on board, representing more than 90% of the total European market value. Full details on the Charter are available in the sustainability section of this report (page 15).

**KPI Highlights**

- Companies signed up to the Charter: 216
- Energy use per tonne: 0.79 GJ/t
- CO₂ emitted per tonne: 54.3 kg/t
- Products sold with ASP logo: 1 billion
Sustainability assurance for products

Since 2010, the Charter also offers a product scheme, enabling companies to give sustainability assurance for individual products.

Companies wishing to do this need to meet Advanced Sustainability Profiles (ASPs) for the particular category of product concerned. These criteria have been derived based on life cycle analysis (LCA), identification of environmental hotspots, and criteria to be met in terms of resource efficiency, recycled packaging content, environmental safety and performance among others (see details page 17).

This past year, we amongst and launched ASPs for household hand dishwashing detergents, toilet cleaners and for professional building care products, to add to those for other categories already in place. Companies who demonstrate that they fulfill those criteria for their specific products in these categories may begin to display the Charter ASP logo on packs after a lead time of a year has elapsed, giving everyone time to prepare.

ASP criteria are also available for household laundry detergents, fabric conditioners, automatic dishwashing detergents, all-purpose, floor and trigger spray cleaners. Around a third of all laundry detergent products sold in Europe now comply with all the Charter requirements, covering company processes, product design and communications to end-users on sustainable consumption.

Product Environmental Footprint

The idea of the European Commission’s Product Environmental Footprint (PEF) initiative is to develop a consistent and transparent way to measure the environmental footprint of products, to help raise awareness among businesses and consumers and hence help to reduce that footprint. A.I.S.E., together with partners from the industry, volunteered – and was retained – to develop and test the PEF methodology for products in our sector. The project, focusing on household liquid laundry detergents, got underway in late 2013.

Since then, the project has made great strides. In March 2014, following detailed preliminary studies, we held a well-attended stakeholder consultation workshop, used the feedback to further refine the model and then, in May, presented that proposed model and the product scope to the steering committee for approval. Next, working together with external stakeholders and industry members, big and small, we finalised the PEF screening, an assessment of the impact of the representative product according to 15 different environmental impact categories. This report was sent to the European Commission and a panel of independent experts for review in December 2014.

One of the first key findings from this work concerned the challenges encountered in applying the proposed USEtox methodology to assess the human and ecotoxicological impact of chemicals. So we participated in a workshop on the subject with stakeholders in January, where it was agreed that further developments and improvements were needed before USEtox can be used for the ultimate purpose of PEF. Since then, we have been drafting PEF category rules based on the screening and testing these through consultation and studies. We have also started working on how best to communicate to business and consumers on product environmental footprints.

Find out more at www.aise.eu/pef and http://ec.europa.eu/environment/eussd/smgp/productfootprint.htm

Product Resource Efficiency Projects (PREPs)

Product resource efficiency projects (PREPs) seek to help consumers minimise the environmental impact of their laundry process by promoting the compaction of detergent powders, liquids and fabric conditioners.

In June 2014 the two PREPs for household laundry detergent powders and liquid fabric conditioners that were running in Europe have ended. The project underway in Jordan, dubbed “concentrate for the environment”, will end in June 2015.

A.I.S.E. is currently developing a new PREP initiative for household liquid laundry detergents which should be launched within this year.

More information is available at: www.aise.eu/preps

Promoting sustainable consumption

Life cycle analysis shows that most of the environmental impact of cleaning products occurs during the use phase, so it remains important for the industry to work on raising awareness and helping people to use our products more sustainably.

Best use panels

Best use panels on cleaning product packs aim to engage consumers with clear and accessible tips on how to use the product sustainably. This past year, we developed best use tips for trigger spray cleaners and toilet cleaners and these can be found now both on pack and on Cleanright.eu, together with those for a number of other product categories.

TIPS FOR SAVING WATER, ENERGY, CO2 AND MONEY

Dose economically. Use the dosage instructions

Save packaging - Refill or recycle

WWW.CLEANRIGHT.EU

TIPS FOR SAVING WATER, ENERGY, CO2 AND MONEY

Apply correctly. Use only for spot cleaning or small areas.

Save packaging - Recycle or refill

WWW.CLEANRIGHT.EU
I Prefer 30°

We are very proud of the success of the I Prefer 30° campaign to encourage people to save energy by doing their washing at 30 degrees. While 2013 was more focused on B2B promotion and engaging with partners, (following the launch of the campaign jointly with the European Commission and Climate Commissioner Hedegaard), much of 2014 was about getting the message across to consumers in the five campaign countries.

The main media campaign consisted of web banner advertising and print ads, complemented by some excellent and creative activation initiatives by different partners – retailers, textile and detergents manufacturers, universities and other organisations, and our five partner national associations DETIC (BE), SPT (DK), Afise (F), Assocasa (I) and UKCPI (UK). These ranged from social media activities and contests to events with major retailers, point of sale activities, go cards, PR events, etc. We are now working on a final campaign report, measuring both quantitative and qualitative results of this unique multi-stakeholder initiative, and will feed the learnings into the next phase of the campaign.

To access the campaign full report, please visit www.aise.eu or www.iprefer30.eu

2014 consumer habits survey

Towards the end of 2014, we conducted our triennial consumer habits research in 23 countries across Europe, reaching almost 5000 consumers. This was the third such survey, following previous ones in 2008 and 2011.

Topline findings include a clear decline in consumer demand for environmental information in the current tougher economic climate. Consumers seem to be making less effort to be more sustainable and believe that industry has a key responsibility in this respect. Communications clutter also emerged as an issue: less people read the information on packs but, when asked, consumers believe that there is sufficient or even too much information provided.

When it comes to washing and dishwashing habits, the trends observed in the past confirm that the typical European consumer does not exist, with big disparities in habits between Northern and Southern Europe continuing. Engaging consumers on the lowering of the wash temperature, actual dosage of detergent and benefits of compacted products remains a challenge, whereas running appliances only when full or nearly full is now a fairly well established habit. More details to follow on www.aise.eu

Cleanright

Cleanright.eu is the place to go online for a wide range of useful information on detergents, cleaners and maintenance products for use in the home. New content this past year includes new best use tips for all purpose and trigger spray cleaners. More will follow soon with communication to consumers on the label changes with the introduction of CLP Regulation.

The Cleanright web portal, which is available in 25 languages, continues to be very popular. It helps consumers understand the broad range of home care products available in Europe today. Cleanright.eu outlines the benefits each cleaning product offers and how to use them safely and sustainably.

Key Figures:
• Each month 5500 consumers visit Cleanright.eu
• Since launch in December 2009 over half a million users saw the site
• The majority of users are first-time visitors but 17% are return visitors
Promoting safe use of products

Product Stewardship Programmes

Product stewardship programmes, or PSPs, are voluntary initiatives that aim to promote best practice and heighten awareness about the safe use of particular types of products.

We have been running two PSPs so far, for air fresheners and liquid laundry detergent capsules, and launched a third PSP for laundry capsules sold in soluble film in March 2015.

Ensuring the safe use and storage of liquid laundry detergent capsules has been a key focus this past year, following some incidents of accidental exposure of young children to these products. While we saw rapid and efficient implementation of our initial PSP requirements, we have contributed to the development and rapid introduction of a regulation, amending the Classification, Labelling & Packaging (CLP) Regulation with regard to hazardous liquid laundry detergent capsules in soluble films. The amended regulation came into force on 26 December 2014 and applies from 1 June 2015 onwards. A.I.S.E. has written guidelines to help the industry sector implement measures mandated by the new legislation (please visit www.aise.eu for more details).

We also stepped up the requirements of our liquid laundry detergent capsules PSP in April 2014, introducing a mandatory safety message to be added with immediate effect to all brand advertising and other communications.

In addition, a lot of work has gone into helping Poison Control Centres and their European umbrella organisation, EAPCCCT, to secure adequate monitoring of incidents. In cooperation with Poison Control Centres, in five countries, we launched a specific accidentology project to better understand from a qualitative point of view the conditions and nature of incidents. The information will serve to assess which preventive measure(s) is (are) most efficient to reduce occurrence of accidental child exposures.

Regular progress reports, which are part of our PSP commitment, have shown a decrease in the number of incidents ranging from 25% to 45% in five countries. Read about PSPs and the December 2014 update on our website at www.aise.eu/psp.

In parallel, we worked with partners to develop and run the Keep Caps From Kids campaign (see aside).

Keep Caps From Kids

On top of our product stewardship measures, in 2014 we developed a pan-European campaign called (KCKF) “Keep Caps From Kids” which was launched in September 2014 in 32 countries and in 25 languages. Central to this campaign is a website and a video, while a digital media campaign ran throughout the fourth quarter of 2014 with online display advertising and video pre-rolls targeted at parents with children up to 5 years.

The campaign features safety tips and a clear call to action for parents and child caregivers always to keep liquid laundry detergent capsules away from children. A KCFK communications toolkit can be downloaded via the KCFK extranet by national associations and campaign partners.

By the end of 2014, the campaign had reached 97 million unique users and made 260 million impressions.

While originating from our industry, this campaign has been designed to be accessible and amplified by any partner who can help promote such safety messages. We are pleased to count more than 20 partners to date, including the European Child Safety Alliance and several of their members, as well as government ministries and Poison Control Centres and other organisations.

www.keepcapsfromkids.eu

HANDLE AND STORE SAFELY

Keep out of reach of children

Close the lid properly

www.keepcapsfromkids.eu

Regular progress reports, which are part of our PSP commitment, have shown a decrease in the number of incidents ranging from 25% to 45% in five countries. Read about PSPs and the December 2014 update on our website at www.aise.eu/psp.

In parallel, we worked with partners to develop and run the Keep Caps From Kids campaign (see aside).

Partners to the European
KEEP CAPS FROM KIDS campaign, as at May 2015

Main sponsor

Sponsor

Main sponsor

Sponsor

Main sponsor

Sponsor

Main sponsor

Sponsor

Main sponsor

Sponsor

Main sponsor

Sponsor

Main sponsor

Sponsor

Main sponsor

Sponsor

Main sponsor

Sponsor

Main sponsor

Sponsor

Main sponsor

Sponsor

Main sponsor

Sponsor

Main sponsor

Sponsor

Main sponsor

Sponsor

Main sponsor

Sponsor

Main sponsor

Sponsor
2. PRODUCT SAFETY & INNOVATION

Ensuring that cleaning and maintenance products are safe to use and used safely is a top priority for us and all our members. This is something we can never get complacent on and an enormous amount of work goes on to this end every year. 2014-15 was no exception. We are active both through voluntary industry initiatives and in supporting the implementation of legislation, including REACH, CLP, the Biocides Regulation and Detergents Regulation.

Support for CLP Implementation

Detergents Industry Network for CLP Classification (DetNet)

We launched DetNet in late 2013 to help companies classify, label and package their products in accordance with the Classification, Labelling and Packaging Regulation (CLP). We are pleased to report that more than 140 companies had signed up at last count, enabling them to use the DetNet database as they prepare for CLP going into effect on 1 June 2015. More than 185 classification experts have been nominated by their companies and received access to DetNet. About 500 product classifications were derived using toxicological data from DetNet.

Supporting work over the past year has included a workshop in Belgrade organised with our member national association KOZMODET, where we presented DetNet to Serbian local authorities and industry. We also held a workshop at our General Assembly and presented DetNet at an ECHA HelpNet workshop for SMEs on CLP in September.

End 2014, the Dutch National Coordinator (RIVM) at OECD agreed to submit A.I.S.E. project proposal to revise the OECD Test Guideline 438 (Isolated Chicken Eye Test) to include histopathology as an additional endpoint for the Determination of Ocular Irritation of Detergent and Cleaning Products. In April 2015, the Working Group of National Coordinators of the OECD Test Guidelines Programme has accepted to include the revision proposal in their work plan.

Other CLP implementation activities

As the CLP implementation deadline of 1 June 2015 approaches, the European Commission and ECHA have launched an awareness campaign to proactively create awareness among industry around the Regulation, which A.I.S.E. has been supporting.

We also continue to provide guidance and advice to member companies on practical issues relating to implementation and incoming amendments of the legal text, including:

- Definition of placing on the market
- Use of multi-lingual fold out labels (with the support of Detic)
- Use of the International Nomenclature of Cosmetic Ingredients (INCI) reference
- Inner/outer case labelling
- Harmonised reporting to EU Poison Control Centers

CASE STUDY: Amendment to the CLP Regulation on liquid consumer laundry detergent capsules

The CLP Regulation was amended in December 2014 (Regulation (EU) no 1297/2014/EC) to add a number of rules applicable in all EU member states to further improve the safety of liquid laundry detergent capsules for single use. The amendment comes in response to the commitment by EU regulators and the detergents industry to enact measures without delay to further reduce the risk of accidental exposure of small children to these new forms of liquid laundry detergent products.

The measures adopted by the European Commission build on a number of initiatives that have already been voluntarily implemented by industry since the end of 2012, through the A.I.S.E. Product Stewardship Programme on liquid laundry detergent capsules.

Under the amended Regulation, liquid laundry detergent capsules will have to be delivered in opaque or obscure outer packaging, always bear the precautionary statement “Keep out of reach of children” in an attention-grabbing format and have closures that are difficult for small children to open. All the soluble packaging of the capsules will also have to meet a given resistance strength to retain their liquid content for at least 30 seconds when immersed in water, and to contain a safe aversive agent that causes a fast repulsive reaction in case of accidental contact with the mouth.

* Liquid laundry detergent capsules are also available in other colours and shapes.
In January 2015, ECHA published its REACH 2018 Roadmap, mapping out the milestones to get us to the last registration deadline for existing chemicals, 31 May 2018. It is not that far away!

A.I.S.E., through DUCC, continues to work hard on activities on the Chemical Safety Report / Exposure Scenario (CSR/ES) Roadmap, to improve the quality of chemical safety data systematically transmitted down the supply chain to downstream users and our members and, in turn, end users. The safety requirements communicated to users being mandatory, it is essential to ensure they are modelled based on realistic conditions.

In the past year, we contributed to include an illustrative example of exposure scenarios for a hypothetical hazardous substance to be annexed to a safety data sheet, guidelines for the development of SCEDS (the Specific Consumer Exposure Determinants - which facilitate realistic consumer exposure assessment for a range of consumer products), and an approach for generating Exposure Scenario structured short titles. Guidelines on the latter have been developed in collaboration with ECHA and other industry partners, and have now been published. Plus we helped to test improved Sectorial Use Maps, due to be published by the end of 2015.

We have also been working on supporting our members from the Professional Cleaning and Hygiene sector with their communication obligations to end users of their products, which get more complex under REACH. Together with our Dutch national association, NVZ, and our German association IHO, we developed and introduced a new Generic Exposure Information Sheet (GEIS) in June 2014. The GEIS is a simple, standardised information sheet for each use of a product, making it easier for companies in our sector to pass on meaningful and standardized information on the safe handling of our products to professional cleaners, as required under REACH. The tool has been taken up as a good practice example by ECHA and is presented on its website and in webinars.

While hygiene standards are relatively high in Europe, outbreaks of SARS, MRSA, Norovirus, Listeria, H1N1 Influenza, hospital acquired infections and Ebola just to cite some of them, highlight the concern about the spread of infectious diseases and the need for good levels of hygiene as a first line of defence. A.I.S.E. member companies manufacture biocidal products, mainly for disinfection in targeted places (hospitals, food processing, restaurants, at home, etc), that help eliminate or reduce the contact with such serious or even fatal infection agents.

An amendment to the Biocidal Products Regulation entered into force in April 2014, bringing some important changes such as clarifying the definition of “biocidal product family” (BPF). This gives companies more flexibility to create product family dossiers, resulting in reduced authorisation fees and administrative burden as well as allowing room for product innovation.

Building on the workshop jointly organised with Cefic in March 2014, the approach on how to implement the BPF concept was endorsed by the Biocides Competent Authorities in November. Industry experts from A.I.S.E. and Cefic further developed some practical BPF examples that served as a basis for the development of an official Q&A document during a second workshop held in January 2015 involving the European Commission, Member States, ECHA and industry experts.

We also held a workshop especially to help SMEs who may want to organise consortia. In cooperation with two other partners, we contributed to a bid for, and won, a European Commission tender to develop a practical guide for SMEs on consortia, letter of access and data sharing. The guide was delivered and published in February 2015.

In addition we were actively involved in helping to clarify how to handle in-situ generated active substances and on dealing more pragmatically with treated articles (such as liquid detergents containing preservatives), and are now supporting our members in understanding and applying the related requirements.
Detergents Regulation

The updated Detergents Regulation imposes a ban on inorganic phosphates in domestic laundry and dishwasher detergents that must be complied with by 30 June 2013 for laundry detergents and 1 January 2017 for dishwasher detergents.

A.I.S.E. published guidelines back in 2013 already to help our members with implementing the regulation and we continue to provide support and contribute to the EC’s Detergents Working Group.

During 2014, the Commission initiated a review of the level of phosphates in consumer automatic dishwashing detergents with an assessment of phosphate alternatives. The Commission’s decision with the conclusion on whether the limit as proposed currently in the Detergents Regulation, i.e. 0.3 g of phosphorus/wash, shall be maintained or not shall be published during this year.

We also contributed to discussions about the implications for the detergent sector of the EC’s public consultation in February 2014 proposing to amend the annexes of the Cosmetics Regulation following the Scientific Committee on Consumer Safety’s opinion on fragrance allergens in cosmetics products.

Detergent Test Protocol

Laundry detergents are sometimes compared on performance by advertisers and consumer organisations, and this can offer useful information to consumers provided the testing methods are robust and standardised.

Some time ago, we set up the Detergent Test Protocol (DTP) Task Force to that end, namely, to develop a minimum-requirement methodology for assessing the performance of detergents across Europe. The testing protocol has been available since 2009 and the task force continues to build on it by adapting the standard types of stain that detergents can be tested on to the current consumer behaviors and technology. The main focus over the past year has been on the development of a body soil stain. To access our protocol, please visit www.aise.eu.

Indoor Air Quality

Both France and Spain authorities are considering legislation on indoor air quality and our national associations Afise in France and Adelma in Spain are actively participating in discussions. A.I.S.E. is contributing also, through our IAQ/VOCs Task Force. In this context, the TF is working on a new Product Stewardship Programme (PSP) which would enhance the current PSP on Air Fresheners and would address more appropriately emission of substances into indoor air.

Candle Emissions

Over the past few years, A.I.S.E. has been supporting work on measuring candle emissions and the development of three CEN standards on emission safety of combustible air fresheners. The work at CEN level is still ongoing, the standards being in the final stages of the adoption process. The three CEN standards are expected to be adopted and published towards the end of 2015.

Enzymes

Enzyme safety is another area in which A.I.S.E. is voluntarily involved, as enzymes are a common ingredient in several types of products in our industry, especially laundry detergents. A.I.S.E. is working together with the Association of Manufacturers and Formulators of Enzymes Products, AMFEP, now an Associate member of A.I.S.E., to ensure the appropriate level of safety for handling of enzymes in detergent manufacturing and further downstream uses.

Surfactants suppliers and downstream users, CESIO and A.I.S.E., continue to work in the context of the ERASM platform initiated some years ago. Latest activities include notably the work linked to CEN activities on definition and standards for bio-based surfactants which may support our sustainability strategy for renewable raw materials and an update of life cycle inventory data.

Better Regulation

A.I.S.E. has welcomed the European Commission’s recent drive to ensure “Better Regulation” through the implementation of its Regulatory Fitness and Performance programme (REFIT). Together with the ongoing Cumulative Cost Assessment exercise (CCA) for the chemical sector, we see these initiatives as of strategic importance. They will help quantify direct and indirect costs per most relevant EU legislation and policies affecting the detergents and maintenance products industry and benchmark costs in Europe to implement such legislations in the sector.

We will contribute actively in 2015-16 to the CCA studies and fitness check, to identify legislations that act as an obstacle to the European chemical industry’s capacity to invest, innovate, or efficiently place products on the market with other regions of the world and identify areas of legislation that are too complex, redundant, outdated or inconsistent.
3. COMMUNICATIONS ACTIVITIES & STAKEHOLDER ENGAGEMENT

We strive to be a trusted and reliable partner to policy makers and other stakeholders and, as such, we are committed to constructive dialogue and clear and transparent communications with our members, partners, end-users and all our stakeholders. Here we report on some of our many communications activities over the past year.

Stakeholder outreach and perceptions survey

In the middle of 2014, we conducted a new stakeholder perception survey, to understand better how we are viewed and how we can improve. The survey, designed to update the last one from 2008, was conducted by an independent consultant and the results were shared at an A.I.S.E. advocacy workshop in October.

Overall, there is a positive perception of A.I.S.E. and the cleaning products industry. Our actions on sustainability are recognised as being proactive and our relevance high, given that chemicals legislation is expected to remain high on legislators’ agenda for the foreseeable future.

Overall, the findings confirm that we are focusing on the right priorities and awareness of A.I.S.E. and our activities has strengthened further when compared to the 2008 survey. One contributor to this has been our new website, which has been up and running for over a year now and has also proved a useful reference resource in our outreach activities following the European elections last May.

AOCS World Conference - Montreux, Oct 2014

The World Conference on Fabric and Home Care took place last October in Montreux, Switzerland, and A.I.S.E. shared a booth there with our international umbrella organization, the International Network of Cleaning Product Associations (INCPA). INCPA was especially set up by ourselves and sister associations around the world to coordinate industry positions at a global level, and it launched its new website, www.incpa.net, at the event.

SEPAWA congress & European detergents conference, Oct 2014

Also in October, A.I.S.E. attended the 61st SEPAWA congress for professionals in the world of cosmetics, perfumery, washing and cleaning, which was held jointly with the 10th European Detergents Conference.

For more on the conference, please visit: www.sepawa.com

SME Day, June 2014

Following the A.I.S.E. General Assembly held on 12 June 2014 in Brussels, A.I.S.E. organised a SME Day with the aim to give a global overview on the latest developments in the field of bio-based chemistry and sustainability throughout the value chain. The event was well attended and participants were able to gain valuable insights into the opportunities that exist for more sustainable and energy efficient products.

Information Day, December 2014

Focus on Professional Cleaning & Hygiene

Our 11th Information Day, targeting our Brussels stakeholders, shone the spotlight on the professional cleaning and hygiene sector and its vital role in ensuring hygiene and cleanliness in today’s society. We took the opportunity to present to stakeholders our information leaflet, posters and video about the sector.

Speakers from various parts of the professional cleaning and hygiene sector shared their insights into the wide range of products, services and applications provided and their benefits for society. They also highlighted the challenges and opportunities facing the industry in terms of responsible innovation and developing new partnerships for better, smarter regulation.

Conference materials can be downloaded here: http://www.aise.eu/events/events-list/aise-information-day-2014.aspx?back=184

The panel members included, from left to right: P.Choraine (DG Health-EC), B.Kettlitz (Food Drink Europe), L.Metternich (Spectro), W.Clous (Ecolab), H.Faubel (IHO), Hans Bender (moderator).
Imagine trying to keep our homes, our clothes and linen, and our dishes clean and hygienic without cleaning products and detergents. And what about schools, hospitals, offices, stations and airports as well as food and drink factories?

Companies in the professional cleaning sector of A.I.S.E. contribute to securing high levels of cleanliness and – where appropriate – disinfection in any place outside the home, helping to reduce or eliminate contact with serious and potentially fatal infection agents.
THE PROFESSIONAL CLEANING SECTOR - A KEY CONTRIBUTOR TO PUBLIC HEALTH HYGIENE AND WELLBEING

Delivering products & services to all sorts of customers

The market value of the sector totals some **€6.7 billion** (in 2014), just under a fifth of the total market value of the industry represented by A.I.S.E. Some **85%** of professional cleaning products and services companies are SMEs and the vast majority of them – around **440** – are A.I.S.E. network members.

What do we expect from professional cleaning?

**Benefits:**
- Avoid public health diseases
- Preserve goods and installations
- Contribute to customers and citizens hygiene and wellbeing
- Increase productivity

**€6.7 bn**

- **Laundry** **€ 598 mn**
  - e.g. Commercial laundries, textile rental, on-premise laundries, hotels

- **Building Care** **€ 813 mn**
  - e.g. Airport & rail terminals, commercial buildings, public transport, schools, institutions & government buildings

- **Food & Beverage** **€ 1,328 mn**
  - e.g. Breweries, dairies, food processing, livestock farming

- **Technical Cleaning** **€ 1,140 mn**
  - e.g. Industrial cleaning for manufacturing such as automotive, plastics, household & personal care

- **Kitchen & Catering** **€ 1,274 mn**
  - e.g. Restaurants, canteens, offices, schools

- **Health Care** **€ 1,547 mn**
  - e.g. Hospitals, clinics, care & retirement homes
A WIDE RANGE OF VITAL PRODUCTS AND SERVICES

Companies in the professional cleaning market provide a wide variety of products and services for professional users who often have very specialised cleaning and hygiene needs.

Examples of professional cleaning applications

1. In a dairy company that undertakes transformation, production and delivery of finished dairy products, a professional cleaning company can work with the customer to design and install the cleaning-in-place (CIP) units and the belt lubrication system on the bottle conveyor, using associated chemical products.

2. Washrooms in public buildings or in professional kitchens require dispensers for hand soaps packed in a dedicated system that fits the particular dispenser.

3. Floor care requires a range of products to cope with the different floor materials (carpet, wood, tile, marble, rubber, etc.) and applications such as cleaning, polishing and stripping. A range of machines (sweepers, high or low speed polishing single disk machines, vacuum cleaners) and equipment (mops, lamellos, etc.) are required to carry out these activities.

WHAT’S SPECIAL ABOUT THE PROFESSIONAL CLEANING SECTOR?

- A broad variety of professional customers & needs
- Tailor-made cleaning and hygiene solutions
- Training as an integral part of the service
- Different distribution and sales mode (vs household)
- Vast majority of sales are done through tenders
- Worker friendly dosing and dispensing equipment
- Safety and sustainability as basic principles

Escherichia coli
Bacteria spread in toilets that can cause serious food-poisoning in humans.

Snapshot of a cleaning in place guidance document.
A FOCUS ON SAFETY AND SUSTAINABILITY

While product safety and communications is important throughout the detergents industry, it is particularly so in the professional cleaning and hygiene sector. This is because these companies provide products that can have powerful cleaning and disinfection properties, but also because of the diversity and often customised nature of the products and solutions provided.

Safe use of products

Professional cleaning products and services providers have a key responsibility to provide accurate, up-to-date safe use information to customers so that they can be informed about the precautions required in handling and storing products. The (Material) Safety Data Sheets and Product Information Sheets are the standardised way to do this.

Companies will often go further, providing environmental safety information and advice on cleaning techniques and training of personnel, as well as working closely with their customers to develop and document their hygiene routines and procedures, putting in place targeted occupational health and safety measures to address a customer’s specific situation and helping them to conform to applicable regulations.

Professional cleaning and hygiene companies in Europe have been proactively communicating safe use information to their customers for decades and, in partnership with A.I.S.E., pioneered the development and use of safety pictograms over 20 years ago, a practice that has since spread to the consumer products side of the industry.

Sustainable cleaning

The industry has made considerable progress towards more sustainable cleaning solutions in three key areas in particular:

1) Controlled dosing
2) Concentrated formulations
3) Delivery efficiencies

Besides, more than 80 companies in the professional cleaning and hygiene sector are currently committed to the A.I.S.E. Charter for Sustainable Cleaning.

The A.I.S.E. Charter for Sustainable Cleaning is a voluntary initiative that encourages the whole industry to pursue continual sustainability improvements. With independent verification and KPI reporting, it drives measurable progress on a number of sustainability measures.

70 professional cleaning companies are currently Charter members. Please visit www.sustainable-cleaning.com to find out more.

For more information about the professional cleaning and hygiene sector, please see the booklet, available on our website here (http://www.aise.eu/library/publications.aspx).

A.I.S.E. APPLICATION PICTOGRAMMES FOR PROFESSIONAL CLEANING

To download the full set of pictogrammes, visit www.aise.eu/professionalcleaning

Visit our dedicated section on PC&H on our website including our video

www.aise.eu
A.I.S.E., our national associations and our member companies have a longstanding commitment to strive towards sustainability and we have for a long time engaged in a number of initiatives to this end. The A.I.S.E. Charter for Sustainable Cleaning is our flagship initiative and covers all product categories of the industry, whether in the household or professional sectors. Since its launch in 2005, the Charter allows us to measure and report on several Key Performance Indicators (KPIs) of sustainability from year to year, to promote, encourage and track our industry’s progress towards more sustainable production, design and consumption.

1. CHARTER FOR SUSTAINABLE CLEANING

The Charter for Sustainable Cleaning is a voluntary initiative and aims to encourage the whole industry to undertake continual improvement in terms of sustainability and also to encourage consumers and professional customers to adopt more sustainable ways of doing washing, cleaning and maintenance.

Open to all companies in the industry, whether A.I.S.E. members or not, the Charter continuously offers the most relevant sustainability assurance system for the industry sector, using life-cycle thinking and science as a basis, in alignment with the principles of the EU policy priorities concerning resource efficiency and the circular economy.

A wide variety of activities and requirements are covered, ranging from the human and environmental safety of chemicals and products, to eco-efficiency, occupational health and safety, resource use and consumer information.

How it works

The Charter stipulates a set of twelve Charter Sustainability Procedures (CSPs) which companies implement in their management systems. Six are “essential” requirements for signing up to the Charter and are verified by an independent external verifier. Companies must report annually on 11 Key Performance Indicators linked to CSPs which are published in this report.

Since 2010, the Charter also includes a product dimension, enabling companies to give a sustainability assurance for individual products, with an enhanced Charter logo. Companies can obtain this Charter logo for specific products through voluntary compliance with the Advanced Sustainability Profiles (ASPs) for their particular product categories.

For more information on how the Charter works please visit: www.sustainable-cleaning.com/en.home.orb
More than 200 members committed to the Charter (as at May 2015)

The membership of the Charter for Sustainable Cleaning is continuously growing, with company membership increasing each year.

Since the list changes on a regular basis, please visit the link below to access the latest updates.


2. A SUCCESSFUL COMMITMENT BY THE MAJORITY OF THE MARKET

The A.I.S.E. Charter covers the whole life cycle of products.
3. PROMOTING SUSTAINABLE DESIGN OF PRODUCTS

Addressing the product dimension

In 2010, a fundamental aspect was introduced into the Charter for Sustainable Cleaning, namely the product component. The Charter’s product component enables companies to provide a sustainability assurance for their products. Advanced Sustainability Profiles (ASPs) for individual product categories set sustainability criteria that are ambitious but reasonably achievable by all market players. The parameters are defined based on a life cycle analysis. The Environmental Safety Check (ESC) is a key component of ASPs, which all ingredients in a given formulation must successfully pass. The ESC is a risk-based and conservative tool that assesses the environmental safety of ingredients in the aquatic compartment aligned with REACH principles. The table below provides an overview summary of the ASP criteria available for each product category.

<table>
<thead>
<tr>
<th>Product category</th>
<th>Product formulation</th>
<th>ASP CRITERIA</th>
<th>Activation date¹</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Household laundry products</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Laundry detergent powders</td>
<td>Yes</td>
<td>≤ 75g + ≤ 115ml</td>
<td>1 July 2011</td>
</tr>
<tr>
<td>Laundry detergent liquids</td>
<td>≤ 75ml</td>
<td>≤ 7.0g</td>
<td>Card board: ≥ 60%</td>
</tr>
<tr>
<td>Fabric conditioners</td>
<td>≤ 35ml</td>
<td>≤ 4.0g</td>
<td>Card board: ≥ 60%</td>
</tr>
<tr>
<td><strong>Household automatic dishwashing detergents</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Powders and unit doses with rinse function</td>
<td>Yes</td>
<td>≤ 25g</td>
<td>Card board: ≥ 60%</td>
</tr>
<tr>
<td>Powders and unit doses without rinse function</td>
<td>≤ 20g</td>
<td>≤ 3.5g</td>
<td>Card board: ≥ 60%</td>
</tr>
<tr>
<td>Liquids mono chamber style</td>
<td>≤ 35ml</td>
<td>≤ 4.5g</td>
<td>Card board: ≥ 60%</td>
</tr>
<tr>
<td>Liquids multi chamber style</td>
<td>≤ 35ml</td>
<td>≤ 6.0g</td>
<td>Card board: ≥ 60%</td>
</tr>
<tr>
<td><strong>Household dilutable all purpose and floor cleaners</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Yes</td>
<td>≤ 12ml/l of wash water</td>
<td>≤ 1.3g</td>
</tr>
<tr>
<td><strong>Household trigger spray cleaners</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Yes</td>
<td>according to dosage instructions</td>
<td>≤ 1.4g per 10 ml of product dosage</td>
</tr>
<tr>
<td><strong>Household manual dishwashing detergents</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Yes</td>
<td>≤ 5ml/l of wash water</td>
<td>≤ 0.7g</td>
</tr>
<tr>
<td><strong>Household toilet cleaners</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Yes</td>
<td>according to dosage instructions</td>
<td>≤ 5.6g per 55ml of product dosage</td>
</tr>
<tr>
<td><strong>Professional Building Care Products</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Yes</td>
<td>Minimum dilution ratio: 1:100 for use in buckets, machines (e.g. scrubber dryers), special equipment (e.g. foam equipment) / 1:50 for use in refillable spray bottles</td>
<td>Packaging weight¹: ≤ 0.7g/l for use in buckets, machines such as scrubber dryers, special equipment such as foam equipment / ≤ 1.4g/l for use in refillable spray bottles</td>
</tr>
</tbody>
</table>

For more details related to the above ASP tables please visit: www.sustainable-cleaning.com/en.companyarea_documentation.orb

¹ Products complying with ASP requirements for the product category can start to appear on the market with an ASP logo from this date.
² Packaging weight: (Packaging weight in g / amount of use solution in l) / number of use of primary packaging (i.e. used for same purpose through a return or refill system)
4. 2014 KPI PERFORMANCE

The Key Performance Indicators (KPIs) shown in the table include the results from 2014 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 provide 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

<table>
<thead>
<tr>
<th>KPI</th>
<th>REPORTING DATA</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participating companies</td>
<td>Companies reporting (number of)</td>
<td>8</td>
<td>19</td>
<td>33</td>
<td>45</td>
<td>59</td>
</tr>
<tr>
<td></td>
<td>Manufacturing sites covered</td>
<td>62</td>
<td>78</td>
<td>108</td>
<td>133</td>
<td>152</td>
</tr>
<tr>
<td></td>
<td>% vs Total</td>
<td>81.6%</td>
<td>78.8%</td>
<td>84.4%</td>
<td>88.7%</td>
<td>89.9%</td>
</tr>
<tr>
<td></td>
<td>Production covered</td>
<td>7.3 m t</td>
<td>9.3 m t</td>
<td>10.5 m t</td>
<td>11.1 m t</td>
<td>11.1 m t</td>
</tr>
<tr>
<td></td>
<td>% vs Total</td>
<td>86.2%</td>
<td>86.1%</td>
<td>92.1%</td>
<td>94.7%</td>
<td>95.7%</td>
</tr>
<tr>
<td></td>
<td>Units of consumer products sold (I&amp;I not included)</td>
<td>5,800m</td>
<td>8,200m</td>
<td>9,300m</td>
<td>9,700m</td>
<td>10,200m</td>
</tr>
<tr>
<td></td>
<td>Covered by CSP Check</td>
<td>4,100m</td>
<td>6,800m</td>
<td>8,600m</td>
<td>9,200m</td>
<td>9,800m</td>
</tr>
<tr>
<td>Chemicals safety evaluation</td>
<td>% of ingredients covered by HERA(2) (I&amp;I not included)</td>
<td>64.3%</td>
<td>68.6%</td>
<td>72.9%</td>
<td>75.7%</td>
<td>74.7%</td>
</tr>
<tr>
<td></td>
<td>Production for use under controlled dosing (I&amp;I only)</td>
<td>Not Available</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Occupational health and safety</td>
<td>Accidents frequency rate (expressed per 100,000 man-hours worked by all employees)</td>
<td>0.57</td>
<td>0.55</td>
<td>0.83</td>
<td>0.90</td>
<td>0.98</td>
</tr>
<tr>
<td>Consumer and customer safety</td>
<td>Number of care lines services</td>
<td>109</td>
<td>258</td>
<td>345</td>
<td>455</td>
<td>545</td>
</tr>
<tr>
<td></td>
<td>Consumer contacts registered: Total</td>
<td>754,197</td>
<td>926,840</td>
<td>903,796</td>
<td>890,746</td>
<td>873,380</td>
</tr>
<tr>
<td></td>
<td>% classified as real or perceived health related calls</td>
<td>0.6%</td>
<td>1.3%</td>
<td>1.1%</td>
<td>1.5%</td>
<td>1.3%</td>
</tr>
<tr>
<td></td>
<td>% classified as enquiries (e.g. general or related to the safety of the product, ingredients, allergies etc)</td>
<td>1.3%</td>
<td>1.7%</td>
<td>2.4%</td>
<td>2.6%</td>
<td>2.8%</td>
</tr>
<tr>
<td></td>
<td>Persons trained in sessions devoted to safe handling and use of products and systems (I&amp;I only)</td>
<td>Not Available</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consumer and user information</td>
<td>Consumer product units sold: With at least two safe use icons/sentences</td>
<td>1,237m</td>
<td>2,317m</td>
<td>3,495m</td>
<td>4,907m</td>
<td>5,757m</td>
</tr>
<tr>
<td></td>
<td>With more than two safe use icons/sentences</td>
<td>562m</td>
<td>1,549m</td>
<td>2,136m</td>
<td>3,091m</td>
<td>3,618m</td>
</tr>
<tr>
<td></td>
<td>Units sold carrying relevant best use advice (until 2010: Household washing machine laundry detergents units sold carrying the “washright” panel)</td>
<td>361m</td>
<td>444m</td>
<td>935m</td>
<td>1,090m</td>
<td>1,112m</td>
</tr>
<tr>
<td>Poorly biodegradable organics(1)</td>
<td>kg / % of PBO chemicals, according to the Charter PBO-list, purchased per tonne of production</td>
<td>16.2kg/t</td>
<td>25.4kg/t</td>
<td>24.9kg/t</td>
<td>22.1kg/t</td>
<td>27.2kg/t</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>1.6%</td>
<td>2.5%</td>
<td>2.5%</td>
<td>2.2%</td>
<td>2.7%</td>
</tr>
<tr>
<td></td>
<td>Consumed energy and CO2 emitted(1)</td>
<td>GJ of energy consumed</td>
<td>1.34GJ/t</td>
<td>1.09GJ/t</td>
<td>1.10GJ/t</td>
<td>1.05GJ/t</td>
</tr>
<tr>
<td></td>
<td>kg of CO2 emitted</td>
<td>80.9kg/t</td>
<td>66.9kg/t</td>
<td>64.6kg/t</td>
<td>64.3kg/t</td>
<td>60.9kg/t</td>
</tr>
<tr>
<td></td>
<td>Consumed water(1)</td>
<td>m3 of water (potable and non potable) consumed</td>
<td>1.60m3/t</td>
<td>1.44m3/t</td>
<td>1.47m3/t</td>
<td>1.59m3/t</td>
</tr>
<tr>
<td></td>
<td>kg of waste (hazardous and non hazardous) produced</td>
<td>10.2kg/t</td>
<td>12.9kg/t</td>
<td>11.1kg/t</td>
<td>10.8kg/t</td>
<td>12.4kg/t</td>
</tr>
<tr>
<td></td>
<td>kg of hazardous waste sent off-site</td>
<td>3.2kg/t</td>
<td>3.9kg/t</td>
<td>4.2kg/t</td>
<td>4.1kg/t</td>
<td>3.7kg/t</td>
</tr>
<tr>
<td></td>
<td>Packaging used(1)</td>
<td>kg of packaging purchased</td>
<td>78.0kg/t</td>
<td>92.7kg/t</td>
<td>88.6kg/t</td>
<td>84.6kg/t</td>
</tr>
<tr>
<td></td>
<td>t delivered in refillable containers (I&amp;I only)</td>
<td>Not Applicable</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Products with ASP logo</td>
<td>Number of Household products placed on the market carrying the ASP logo</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1 Data apply to production covered by the CSP Check - 2 water is not considered as an ingredient - /t= per tonne of production - m=million
3 For compliance reasons, these figures were derived only from SMEs and large companies and cannot be compared with the figures for previous years
4 Corrected figure which differs from the one published in last years’ report
KPI HIGHLIGHTS 2014 vs 2013

Charter footprint
There was a slight decrease in the number of companies reporting for 2014 from 93 to 92 due to mergers, and the total production tonnage covered by the Charter including new companies joining was 11.2mt, equivalent to 99.7% of the total output of reporting companies in the EU+4.

Energy consumption
Total energy consumed fell 2.5% on a like-for-like basis.

CO₂ emissions
Total emissions of CO₂ fell 2.3% on a like-for-like basis.

Changes since 2006
Energy use per tonne of production is down by 27.5% and CO₂ by 18.8% over the 9 years since 2006.

Products with ASP logo
The number of consumer products carrying the ASP logo increased from 820m to 1 billion, an increase of 22% on a like-for-like basis. From the laundry category alone, 33% of products comply with the Charter Advanced Sustainability Profiles.

NATURE AND SCOPE OF THE VERIFICATION

Assurance opinion
SGS United Kingdom Ltd was commissioned by A.I.S.E. (International Association for Soaps, Detergents and Maintenance Products) to conduct an independent assurance of the data gathering processes used for collection of KPI data that is to be included in the A.I.S.E. Annual Review and Sustainability Report 2015. The scope of the assurance, based on the SGS Sustainability Report Assurance methodology, was restricted to looking at the data collection processes of a sample totaling ten of A.I.S.E.’s Charter for Sustainable Cleaning members that submit KPI data for inclusion in the Sustainability Report. We are of the opinion that the KPI data collection processes employed by the ten organisations are currently well established, generally reliable and should be able to be applied consistently on an annual basis. Our full Assurance Statement provides our detailed findings and conclusions and can be found at the following web address: www.sustainable-cleaning.com/en.publicarea_sustainabilityreport.orb

Complementary note
SGS was requested by A.I.S.E. to assess the KPI reporting processes of the companies who have been participating in the Charter for Sustainable Cleaning. SGS has provided A.I.S.E. and Deloitte with a report of the visits to the reporting companies that they undertook to carry out this assessment. SGS raised a few minor issues in this report.

On the basis of the SGS report, Deloitte was asked by A.I.S.E. to contact the companies concerned to ask for confirmation of the reported data or to update their declaration. Following these inquiries, the concerned companies provided adjusted data for inclusion in the final data set, as communicated in this A.I.S.E. Activity and Sustainability Report 2014-2015. These data have not been audited by Deloitte.
BOARD
(From June 2014 to May 2015)

Charles-François GAUDEFROY
(President)
Unilever

Ad JESPERS
Sealed Air (Diversey)

Welmoed CLOUS
Ecolab

Ana-Maria COURAS
Portugal, Spain

Nadia VIVA
Procter & Gamble

Luciano PIZZATO
Reckitt Benckiser

Andrea RUMPLER
Bulgaria, Croatia, Czech Republic, Hungary, Poland, Romania, Serbia, Montenegro, Slovak Republic, Slovenia

Thomas KEISER
Austria, Germany, Switzerland

Philip MALPASS
(Vice-President)
Ireland, United Kingdom

Sari KARJOMAA
Denmark, Estonia, Latvia, Lithuania, Finland, Norway, Sweden

Hans RAZENBERG
Belgium, Luxembourg, The Netherlands

Matthias KREYSEL
McBride

Arndt SCHEIDGEN
(Treasurer)
Henkel

Henk VOSSEN
(Observer)
SME representative

Valerie Lucas
France

Jean-Bernard VIDAILLET
Colgate-Palmolive

Françoise VAN TIGGELEN
(Observer)
Chairperson of the National Associations Committee

Giuseppe ABELLO
Cyprus, Greece, Italy

Check out the latest updates to members at www.aise.eu
31 National Associations in Europe and beyond, representing more than 900 companies!

IN SHORT
- Total number of member companies active in the soaps, detergents or maintenance products domains: 936
- Number of companies which are Small and Medium-sized Enterprises: 604
- Number of companies which are active in the Professional Cleaning & Hygiene domain: 521
- Number of companies which are active in the Consumer Product domain: 540
A.I.S.E. TEAM
(AS AT MAY 2015)

Christèle BAËR
Finance and Administration Manager
+32 2 679 62 62 christele.baier@aise.eu

Sylvie LEMOINE
Director, Technical and Regulatory Affairs
+32 2 679 20 16 sylvie.lemoine@aise.eu

Valérie SÉJOURNÉ
Director, Sustainability and Communications
+32 2 679 62 69 valerie.sejourne@aise.eu

Christine BOUDET
Director of Legal Affairs
+32 2 679 62 61 christine.boudet@aise.eu

Anny MARCHAL
Administrative Assistant
+32 2 679 62 64 anny.marchal@aise.eu

Giuseppe SIMONE
Technical and Scientific Affairs Manager
+32 2 679 62 68 giuseppe.simone@aise.eu

Elodie CAZELLE
Technical and Scientific Affairs Manager
+32 2 679 62 84 elodie.cazelle@aise.eu

Sophie MATHIEU
Technical and Scientific Affairs Manager
+32 2 679 62 85 sophie.mathieu@aise.eu

Mohamed TEMSAMANI
External Affairs Manager
+32 2 679 20 15 mohamed.temsamani@aise.eu

Caroline DUBOIS
Communications Assistant
+32 2 679 62 70 caroline.dubois@aise.eu

Sascha NISSEN
Sustainability and Communications Manager
+32 2 679 62 65 sascha.nissen@aise.eu

Susanne ZANKER
Director General
+32 2 679 62 71 susanne.zaenker@aise.eu

Marie-Karen GUSTAVE
Administrative Assistant
+32 2 679 62 72 marie.gustave@aise.eu

Laura PORTUGAL
Technical and Scientific Affairs Manager
+32 2 679 62 76 laura.portugal@aise.eu

Ellen HEINRICH
Communications Manager
+32 2 679 62 66 ellen.heinrich@aise.eu

Martine REBRY
Assistant to Director General
+32 2 679 62 67 martine.rebry@aise.eu
A.I.S.E. MEMBERS AND CONTACTS

Membership opportunities:
A.I.S.E broadens its membership and welcomes new members.

A.I.S.E. has enlarged its network by welcoming 2 new members from related industries along the value chain: Novozymes, a biotech company with a strong focus on enzyme productions, and MonoSol, a company dedicated to manufacturing water soluble polymer films and compounds have become Associate Members. The Ukrainian Packaging & Ecological Coalition (UkrPEC) was endorsed as an Extraordinary member.

Two additional membership categories have been created: “Supporting Corporate Members” and “Corresponding Corporate Members”. It will allow for smaller enterprises in our sector to become direct members of A.I.S.E. and benefit from taking a more active role in the Network and in the definition of the industry’s Strategy.

A.I.S.E. Membership Structure

A.I.S.E. SECTOR:
(Detergent & maintenance products for household or professional use)

- Ordinary Members
  - Companies (with presence and National Association membership in EU/EFTA countries, as per the A.I.S.E. Constitution)
  - National Associations in EU/EFTA countries

- Extra-Ordinary Members
  - National Associations outside EU/EFTA countries

- Supporting Corporate Members

- Corresponding Corporate Members

LINKED TO THE A.I.S.E. SECTOR:
(eg raw material, packaging suppliers, appliance sector, retailers)

- Associate Members
  - Companies in EU/EFTA countries
  - Associations (EU and/or national)
We Have Moved!
New Address:

A.I.S.E.
Boulevard du Souverain, 165
1160 Brussels, Belgium
Tel: +32 (0)2 679 62 60
Fax: + 32 (0)2 679 62 79
aise.main@aise.eu
www.aise.eu
BE 0538 183 615