

ACTIVITY & SUSTAINABILITY REPORT 2020-21

FOREWORD

A.I.S.E.
MEMBERSHIP

A.I.S.E.
NETWORK

CLEANLINESS
& HYGIENE

SUSTAINABLE
DEVELOPMENT

REGULATORY
AFFAIRS

VOLUNTARY
INITIATIVES
& INDUSTRY
GUIDANCE

A.I.S.E. BOARD
& A.I.S.E. TEAM

A YEAR LIKE
NO OTHER

NAVIGATING THE DIGITAL VERSION OF THE REPORT

If you are reading this, then you have chosen to open
A.I.S.E.'s Activity & Sustainability Report online. **Welcome!**

The tabs on the left-hand menu will help you navigate from chapter to chapter on your screen, in the place of a traditional table of contents. Throughout the Report, hyperlinks in the text will provide you with either complementary information by downloading a document; or take you to a relevant web page where you can read about the topic in more depth.

TRADITIONAL NAVIGATION

If you would prefer to read the A.I.S.E. Report from front to back cover flicking through the pages, just email your request for a printed copy to aise.main@aise.eu and we will be happy to send it to you.



From "View from my Window"

"This is the view from my kitchen window. Not the most glamorous but I take great comfort that daily rituals, like laundry, are still happening. The simplest of routines provides hope and a touch of normal in an abnormal time"

► Kate Bringardner | San Miniato, Pisa | Italy | April 3, 2020 | 8:51 am

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A YEAR LIKE NO OTHER: THE A.I.S.E. TEAM WORKING FROM HOME IN 2020 & 2021 inside back cover

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 nearly 70 years.

Membership consists of 29 national associations across Europe, 17 corporate members and 14 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 €41,2 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



Scientific research

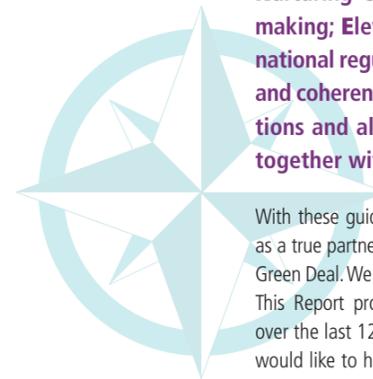


Chemical ingredients are essential to safe and effective cleaning and hygiene products. It is therefore essential that the regulation of such products and their ingredients be based on robust **scientific principles and data**. A.I.S.E. carries out scientific research with partners (academia, research institutes, etc.) to assess the impact of formulations on human health and the environment. Once complete, research results are made widely available through articles in academic or scientific journals. In this report, examples of such scientific research are highlighted with this icon.

FOREWORD



One year ago, I had the honour to take on the leadership of A.I.S.E. At a time when the business environment in Europe is going through such tumultuous change, A.I.S.E. navigates the course like a real compass guiding our sustainable decision-making: **Nurturing science-based evidence for sound policy making; Elevating the voice of the industry to EU and national regulators; and Working together as one strong and coherent network with companies, national associations and all value chain partners, Shaping the future together with all stakeholders.**



With these guiding principles steering our work, A.I.S.E. is committed as a true partner in the successful implementation of the Commission's Green Deal. We share the same vision of a better and sustainable world. This Report proudly presents our collective work and achievements over the last 12 months on a wide range of topics. Looking forward, I would like to highlight the three priorities that will remain our major focus in the year ahead:

- A.I.S.E. shares the goals of the **Chemicals Strategy for Sustainability (CSS)** to protect human health and the environment and will be an active contributor at the CSS High Level Round Table. We are honoured to join the debate that aims to shape a sound, robust, science-based legislative framework so that essential, safe and high-performing cleaning products and disinfectants continue serving the needs of European citizens.
- Our flagship **Charter for Sustainable Cleaning** is widely recognised for driving impactful sustainable progress and its members' achievements contribute directly to Europe's Circular Economy Action Plan and the goal of a carbon neutral EU by 2050. We are committed to the Charter's continuous evolution in view of the legislative upcoming requirements behind substantiating green claims or ecodesign principles, in close collaboration with the Commission.
- **Digitalisation** is the challenge of our generation and enables us to empower consumers through technology - A.I.S.E. is working relentlessly in collaboration with the Commission towards a common goal of simplifying product labels to make them more meaningful for consumers, notably increasing transparency and maximising safe and effective use.

These are complex topics which also represent significant challenges for all stakeholders involved but I am more confident than ever in our industry's and our association's ability to deliver critical contributions for a better Europe, together.

Yours sincerely,

Nadia VIVA,
A.I.S.E. President (2020-2022)



Among the many lessons learned in these last 12 months is the critical role of hygiene in our lives to help prevent the spread of infectious diseases. There is today a much broader understanding of the importance of hygiene for our health. To a large extent, the benefits of our industry are largely taken for granted until public health is in jeopardy.

A year after the COVID-19 pandemic rocked our daily lives, I am immensely proud of how each person in the A.I.S.E. network has worked relentlessly to ensure the availability of essential cleaning and disinfectant products for clean homes, safe public spaces and clean hands. This year's Report includes a more personal view of how we dealt with this upheaval, how our companies and national associations went to extraordinary lengths to supply soaring demand, while at the same time **never losing focus on our long-term strategy and our responsibility to engage** on the Commission's priorities.

Our commitment to implement the EU Green Deal means focussing on those areas most critical to our industry, as outlined by the President and detailed in this Report. The Commission's ambitious goals require a mindset shift for business, but I am confident that **A.I.S.E.'s 2025 Strategy is fully reflective of these priority chapters** for the detergents industry.

A.I.S.E. will continue to advocate for a strong and innovative future for its industry. The growth in market value in 2020 to over €40 billion indicates to what extent this industry is a **substantial contributor to the European economy**. To remain globally competitive, we will continue working towards a coherent and fully functioning EU Single Market.

I invite all our stakeholders to peruse this report and the overview it presents of the association's achievements. As always, we welcome engagement and discussion, and remain committed to our vision to continue to serve society in an innovative and sustainable way.

I would also take the opportunity to thank the A.I.S.E. members, national associations, companies and my team for their tenacious efforts during the turbulent time of the pandemic to ensure the availability of our essential products.

Yours sincerely,

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

A.I.S.E. MEMBERSHIP (AS OF JUNE 2021)

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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A.I.S.E. NETWORK

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VOLUNTARY INITIATIVES & INDUSTRY GUIDANCE

A.I.S.E. BOARD & A.I.S.E. TEAM

A YEAR LIKE NO OTHER

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8 ORDINARY CORPORATE MEMBERS

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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 luca.conti@aise.eu

A.I.S.E. NETWORK

REPRESENTING THE DETERGENTS AND MAINTENANCE PRODUCTS INDUSTRY ACROSS EUROPE

- FOREWORD
- A.I.S.E. MEMBERSHIP
- A.I.S.E. NETWORK**
- CLEANLINESS & HYGIENE
- SUSTAINABLE DEVELOPMENT
- REGULATORY AFFAIRS
- VOLUNTARY INITIATIVES & INDUSTRY GUIDANCE
- A.I.S.E. BOARD & A.I.S.E. TEAM
- A YEAR LIKE NO OTHER

A STRONG NETWORK of over **900** COMPANIES

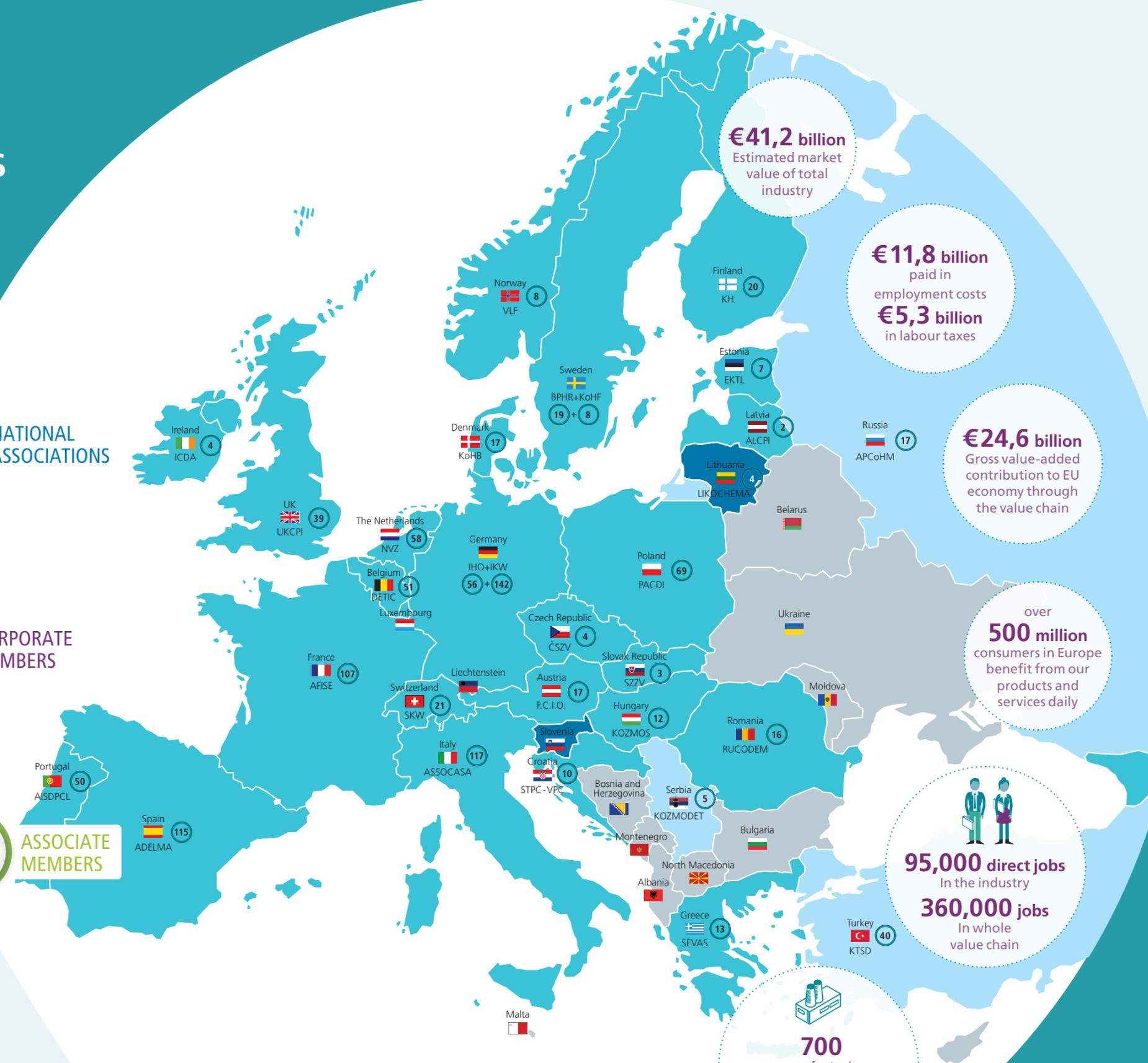
29 NATIONAL ASSOCIATIONS

17 CORPORATE MEMBERS

14 ASSOCIATE MEMBERS

A.I.S.E. REPRESENTS AN INDUSTRY THAT PROTECTS OUR EUROPEAN WAY OF LIFE

- Keeps our homes and public places clean and hygienic
- Facilitates convenient and modern lifestyles
- Secures patient safety in healthcare environments
- Maintains the durability of goods
- Prevents infection through good hygiene practices
- Increases productivity for companies
- Makes our lives more pleasurable and satisfying
- Protects investments in brands
- Adds to our sense of wellbeing
- Contributes to sustainability



€41,2 billion
Estimated 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

over **500 million** consumers in Europe 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 in 2020)
■ A.I.S.E. members outside EU/EFTA (extraordinary members)
■ Cooperation with A.I.S.E. network
■ No A.I.S.E. member association
① Total number of member companies per National Association

See inside front cover for full list of membership

THE FUTURE OF AN ESSENTIAL INDUSTRY IN THE CONTEXT OF THE EU CHEMICALS STRATEGY



RESPONDING TO AN UNPRECEDENTED CRISIS

The A.I.S.E. network moved rapidly as the pandemic took hold in early 2020 to ensure the ongoing supply of vital products for cleaning and disinfection across all markets for household and professional use. Due to its portfolio of products and services, A.I.S.E. is an essential sector in the fight against COVID-19, and our companies took a leadership role in providing European citizens with crisis-relevant products such as hand disinfectants, surface disinfectants, and other essential cleaning products for homes and professional settings.

A.I.S.E.'s annual Cleaning & Hygiene Forum on 2 December 2020, was dedicated to the industry's response to the public health crisis. Moderated by Susanne Zänker, these testimonials from large and small companies as well as National Associations show just how the responsive and human approach to finding solutions kept production lines open, sourced out of stock ingredients, and overcame administrative hurdles despite closed borders.

Here is a glimpse at how our network responded to the unprecedented demand for hygiene solutions.

LEARNINGS FROM THE PANDEMIC

As a critical contributor to public health, A.I.S.E. will increase public resilience for the future by continuing to:

- Maintain a portfolio of products proven to be effective and safe for use that meet consumer demand
- Educate consumers on hygiene, cleaning and disinfection and appropriate products;
- Advocate for regulatory flexibility for fast approval and availability of biocidal products;
- Take our collective responsibility with all stakeholders to contribute to health and hygiene policies for a post COVID-19 society.



► A.I.S.E.'s annual event was live streamed on 2 December 2020 with over 300 registrations from the competent authorities, the European Commission, ECHA, Poison Centres, as well as industry members and value chain partners. [Listen to the full testimonials on www.aise.eu](https://www.aise.eu)

Key role of hygiene emphasised at A.I.S.E.'s annual Forum

HYGIENE IS THE FOUNDATION FOR HEALTH



Heather, Reckitt is a global leader in hygiene, cleaning and disinfecting products. Could you paint a picture for us of how the crisis impacted your company and how it adapted in response.

"It is widely acknowledged that hygiene is the foundation for health, and companies like Reckitt have seen this translated into increased demand for cleaning products - hand sanitizers and biocides but also dish and laundry detergents as consumers were isolating at home, putting greater need for these everyday items as well.

FMCG companies like Reckitt needed to pivot to meet the increasing demand for cleaning products in 2020, which placed greater global strain on commonly used raw materials and packaging components"

CONSUMERS' CLEANING HABITS CHANGED TO PROTECT THEIR FAMILIES



Ramon, how did P&G deal with the challenges associated with increased production in Europe and globally?

"Consumers' cleaning habits changed as they realised the crucial role that cleaning has keeping themselves and their families safe. Consumers are looking for reassurance that they are doing everything within their control to protect their family, and the frequency of cleaning surfaces and doing the laundry increased significantly, together with demand for cleaning and disinfection products.

Our first priority was to protect our employees and in parallel ensure production kept running. We worked hard to overcome the challenges like the availability of raw materials and sanitary measures at factories, so that we could keep serving our consumers with products available everywhere, on shelf, offline and online. P&G's everyday products are an important part of people's daily routines, making them feel well and safe. Consumers long for products that help them to stay healthy and hygienic."

Flexibility and dedication to ensure the delivery of products for EU citizen's health



KEEPING OUR WORKING AND LIVING ENVIRONMENTS SAFE AND CLEAN

Ad, Diversey is a leading supplier in Europe of professional disinfection solutions to hospitals, public transport operators, hotels and restaurants. How did you adapt to the mounting demand from hospitals/these sectors?

"The demand for these disinfectants increased significantly with the COVID outbreak in healthcare and retail sectors (but dropped in the hospitality sector due to the lockdown). This led to a lack of stock, because active and non-active ingredients could not be sourced.

For example, the global stock of isopropanol was depleted at a point. Isopropanol is one of the major active substances against viruses. Customers needed to totally change the way of working as alternatives evaporate much slower. Due to the extraordinary efforts of my colleagues in the disinfection industry and the flexibility of actors in the market, these interruptions were resolved relatively fast, we could continue to keep our living and working environments safe and clean through the pandemic."



GETTING DISINFECTANTS TO MARKET TO MEET SOARING DEMAND

Ismaël, as CEO of a Belgian SME, tell us how Mondo Specchim was hit by the public health crisis and how you coped with sourcing ingredients and ensuring availability of workers.

"The first wave of COVID-19 required us to produce market disinfectant products to meet the demand of the authorities, distributors and customers and get these to market, which required an adaptation of our work habits, for example introducing additional night shifts. But at every moment, members of the production, logistics, sales and R&D teams were always present and motivated.

Yet the difficulties were great as the shortages were enormous. Few or no active substances were available in Belgium. Most local suppliers did not have sufficient stock, with lead times of several months. It was the same for packaging suppliers -within a few days, all the stocks available in Belgium had been liquidated. The only solution was to go outside our borders and buy internationally. The first lockdown posed huge logistical problems, such as borders being blocked/closed, leading to substantial delivery delays to our customers and additional transport costs to the company."

The key role of National Associations

NATIONAL ASSOCIATIONS ARE KEY COORDINATORS IN COMPLEX SITUATIONS



Sari, could you explain how the role of the national association was so important in managing the crisis?

"The COVID-19 pandemic quickly changed the everyday work in National Associations. Our role as an active coordinator between member companies, national authorities and other relevant players became a busy position. Numerous negotiations dealt for example with the availability of raw materials and possible national exceptions to the BPR requirements.

This pandemic, with its quickly evolving situations, demonstrated the importance of cooperation, good relationships with national decision makers, efficient information exchange mechanisms and a real-time situational picture. In addition, external communications helped to build trust among consumers and professional audiences."

THIS CRISIS WILL HAVE PUT IN LIGHT HOW ESSENTIAL OUR SECTOR IS



Françoise, how did the national associations support businesses to ensure the availability of essential products?

"In spring 2020, the pandemic spread across Europe causing disarray, highlighting also a lack of coherence in national decision-making. As the legislation for disinfection products is not yet fully implemented across the EU, companies had to deal with an exceptional level of confusion on top of an urgent increase in demand for disinfection products.

From the beginning of the crisis, National Associations were at the forefront in speeding up product authorisations and sourcing certain raw materials and packaging. Once the emergency needs were fulfilled, priority focused on ensuring availability of compliant quality disinfection products for the long run. After such a hectic year, let's hope the essentially of the cleaning and hygiene sector will be commonly recognised."

2 CLEANLINESS & HYGIENE

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

€41,2 BILLION
ESTIMATED MARKET VALUE 2020

OUTSIDE THE HOME
€8,8 BILLION MARKET VALUE

FUNDAMENTALLY SUSTAINING SOCIETY WITH PROFESSIONAL CLEANING SOLUTIONS

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A.I.S.E. BOARD & A.I.S.E. TEAM

A YEAR LIKE NO OTHER

KEEPING OUR HOMES CLEAN AND ENSURING OUR WELLBEING

AT HOME
€32,4 BILLION MARKET VALUE

Cleaning and hygiene in my home is important because it helps me and/or the people I live with avoid becoming unwell or getting an infectious disease

89%

My own cleanliness and hygiene is not just important for myself; it is also important for the health of people around me

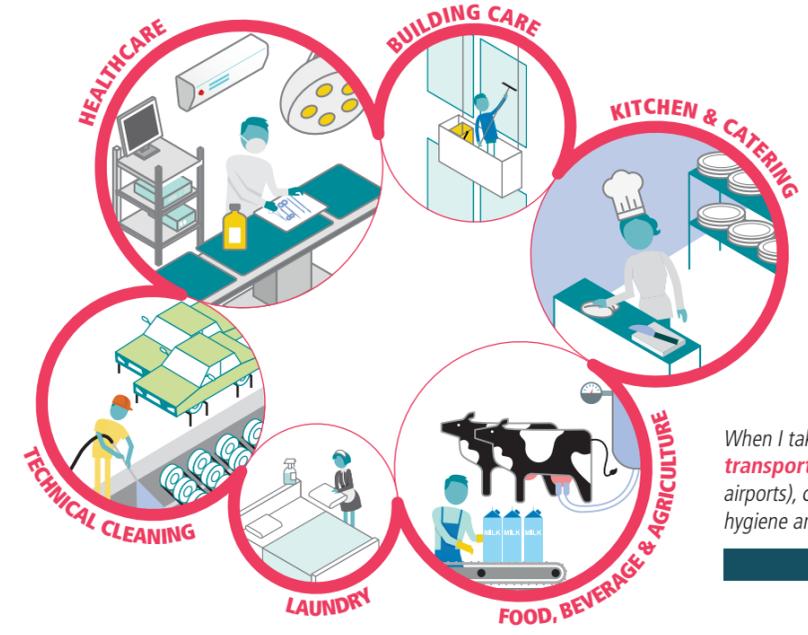
90%



HOUSEHOLD CARE	LAUNDRY CARE	SURFACE CARE	DISHWASHING	MAINTENANCE PRODUCTS	BLEACHES	TOTAL
MARKET VALUE 2020 (BILLION €)	15,3 <small>Liquid detergents 5 Powder detergents 2,7 Detergent unit doses 2,1 Fabric conditioners 2,7 Laundry aids, Others 2,8</small>	7,2 <small>Surface care 5,1 Toilet care 2,1</small>	5,1 <small>Automatic dishwashing 3,2 Hand dishwashing 1,9</small>	4,1 <small>Air fresheners 2,5 Home insecticides 0,9 Polishes 0,7</small>	0,7	32,4
MARKET SHARE (%)	47.1	22.2	15.8	12.6	2.3	100
GROWTH (%) 2020 vs. 2019	1.3	9.2	10.3	0.9	12.2	4.7

4.7% GROWTH

Source: Euromonitor (EU 27 + UK + CH + NO). Please note that due to fixed exchange rates, the values for 2019 differ from the values published in last year's report.



The cleaning and hygiene industry protects our health and keeps our offices, hospitals, restaurants and public places clean and hygienic

75%

When I take public transportation (e.g. metro, airports), cleanliness and hygiene are important

83%

PROFESSIONAL CLEANING & HYGIENE	HEALTHCARE	FOOD, BEVERAGE & AGRICULTURE	KITCHEN & CATERING	TECHNICAL CLEANING	BUILDING CARE	LAUNDRY	TOTAL
MARKET VALUE 2020 (BILLION €)	2,8	1,8	1,4	1,3	1,0	0,5	8,8
MARKET SHARE (%)	31.6	20.1	16.1	14.9	11.1	6.2	100
GROWTH (%) 2020 vs. 2019	67.1	26	-9.3	20.8	7.4	-16,1	22.9

22.9% GROWTH

Source : A.I.S.E. national associations' data. Total EU + UK + CH + NO.
Disclaimer: The COVID-19 pandemic has had an important impact on the professional market in 2020. As this was obviously not a typical year, the above data and trends are estimations and should be interpreted as such. Read more about the impact of the pandemic on the business on pages 4, 5 & 8.



PUBLIC HEALTH SAFEGUARDED WITH EFFICACIOUS CLEANING AND DISINFECTANT PRODUCTS

Hygiene is of paramount importance in the 21st century and has played a critical role in helping fight the coronavirus pandemic in 2020 and 2021. As illustrated by the economic data and testimonials reported in previous pages, our industry has played a very important role to supply the increasing need for cleaning products and disinfectants in strategic places such as the healthcare sector, provided by our professional cleaning and hygiene companies, where the market demand grew by 67% in 2020.

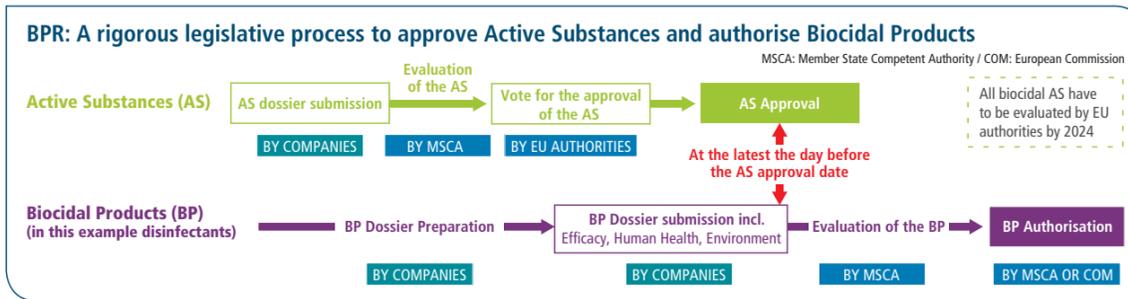
A rigorous process for placing disinfectants on the market

Main product types (PT) under BPR in scope of A.I.S.E. product portfolio for disinfectants

- PT 1 Human hygiene
- PT 2 Disinfectants and algacides not intended for direct application to humans or animal
- PT 3 Veterinary hygiene
- PT 4 Food and feed area

To kill harmful micro-organisms e.g. SARS-CoV-2, the use of disinfectants, both for surfaces and for hands, increased dramatically in 2020. Under the Biocidal Products Regulation (BPR), disinfectants are defined as "biocidal products for hands, surfaces and other uses (e.g. veterinary applications and drinking water disinfection)".

The A.I.S.E. product portfolio includes biocides such as hand, general surface, and laundry disinfectants. In some circumstances, disinfectants are needed at home (read about Targeted Hygiene on opposite page); in professional settings, their use is subject to detailed standards and requirements so as to ensure the hygiene and safety of the agricultural, food and catering chains, or again the medical and healthcare sectors. The graph illustrates the rigorous process that all authorised disinfectants (i.e. biocidal products) need to follow to enter the EU market.



Hand disinfectants: directly in the scope of the A.I.S.E. product portfolio

The hands are a critical contact point most often responsible for the spread of harmful microbes such as viruses. Washing hands with soap and water and drying them appropriately is essential and in most cases efficient against enveloped viruses such as SARS-CoV-2.

Where there is no access to water and soap, an authorised hand disinfectant is recommended as an alternative.

Since the start of the pandemic, the use of hand disinfectants at the entrance of shops, public buildings and transport has become the new norm. Public confidence is needed as society gets back to work, socialising, travelling and eating out, and our industry is – for the vast majority of products – the one supplying such products. Hand and surface disinfectants need to comply with EU legal requirements to ensure they are safe and efficacious when used as instructed on the product label.

Hand hygiene in hospitals is key to prevent the spread of infectious diseases; In 2009, the World Health Organisation (WHO) launched the

"Save Lives: Clean Your Hands" campaign to ensure ongoing global focus on hand hygiene in health care. A key component of the campaign is the concept "My 5 Moments for Hand Hygiene" designed to enable healthcare professionals to easily visualise the risk moments when hand hygiene is needed, and thereby optimise patient safety. All this is relayed under the Clean Hospitals programme, supported by A.I.S.E. and by many of the member companies active in the professional cleaning sector.

A.I.S.E. companies have taken their responsibility to deliver such products and made the relevant investments to cope with this extraordinary demand, whilst protecting the health of their employees.

An extraordinary boom in demand for professional hand disinfectants, example from Germany
+400% demand 2019: 8,700 ▶ 2020: 43,000 tons
 (Source, IHO survey) *monthly average*

PROMOTING TARGETED HYGIENE AT HOME AND APPROPRIATE USE OF PRODUCTS

On 7 April 2021, on the occasion of the WHO World Health Day, A.I.S.E. and the International Scientific Forum for Home Hygiene (IFH) launched a joint report on household hygiene. The report is the result of a long collaboration between industry and academic experts on cleaning and disinfection in homes and stresses how household hygiene needs to change to meet 21st century needs.

A scientifically proven approach to effective hygiene

The report aims at promoting good hygiene, i.e. the practices through which people maintain or promote good health and help prevent the spread of infectious diseases. In particular, it promotes the principles of Targeted Hygiene, an approach which argues that, to be effective, hygiene practices need to be focussed at the times and in the places that matter to break the chain of infection and reduce the risk of exposure to harmful microbes, focusing on 9 key moments. It also explains the two main hygiene procedures which can be used, i.e. using detergent-based cleaning products and when needed, using a hand or surface disinfectant.



"Our industry is committed to promoting appropriate use of disinfectants only when and where needed, in line with the principles of Targeted Hygiene."

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



"Going forward into the 21st century, if we are to address the infectious disease issues we now face, we must ensure that hygiene in our homes and in our everyday lives is recognised as an equal partner to hygiene in healthcare and other settings and pay greater attention to improving hygiene understanding and hygiene behaviour"

Professor Didier Pittet, Director, Infection Control Program, University of Geneva Hospitals and Faculty of Medicine.

"These survey results are a huge contribution to achieving a better understanding of consumers' perceptions and behaviours in Europe. They also confirm that, if activities aimed at consumer behaviour change are to be successful, they must be accompanied by consumer education on the basic concepts of Targeted Hygiene, in partnership with all hygiene stakeholders"

Professor Sally Bloomfield, Chair of the IFH

Working together to improve hygiene behaviour amongst EU consumers

The report also shares interesting insights into current consumer understanding of hygiene, based on pan-European data gathered from 4500 consumers in February and again in June 2020.

The data show that, despite the unprecedented opportunity to promote hygiene during the pandemic, there is little evidence that these public messages altered consumers' perception of risk and therefore hygiene behaviours. Even in June 2020, only 44% of EU citizens felt that not washing their hands with soap after sneezing into them posed a high risk of causing infection, and only 36% claimed that they would always wash their hands after sneezing (versus 32% prior to the pandemic in February). Education on the role and relevance of practices that promote health is still needed before behaviour change can be expected.

The growing awareness of the need for effective hygiene, and the need for clarity about when cleaning is sufficient, and when disinfection is needed, offers significant opportunities to the industry for education and innovation, and calls on all relevant stakeholders to work together to promote this concept.

Consumer research shows that there is a lack of proper understanding by EU citizens of how cleaning vs disinfection practices actually work to reduce contamination on risk surfaces.
 Cleaners get rid of bacteria etc. by removing them from surfaces, disinfectants kill the bacteria etc. on surfaces
37% of consumers agree with this statement
 A.I.S.E. consumer research, Feb. 2020

Download the hygiene report and the detailed consumer survey results on www.aise.eu/targetedhygiene



The report was launched on 7 April 2021 in support of WHO World Health Day. Over 400 stakeholders attended the A.I.S.E. webinar

3 SUSTAINABLE DEVELOPMENT

ACTIVELY CONTRIBUTING TO THE UN AND EU GREEN DEAL OBJECTIVES THROUGH VOLUNTARY ACTION WITH CONCRETE RESULTS

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A YEAR LIKE NO OTHER

A.I.S.E.'S INITIATIVES

UN & EU PRIORITIES



COMPACTION PROJECTS (>1997)



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

PLASTIC PACKAGING INITIATIVE

(For all household packaging)

By 2025:

- Min 20% volume of recycled plastic material
- All plastic packaging
 - recyclable
 - reusable
 - compostable



INDUSTRY GUIDANCE ON SUSTAINABLE PLASTIC PACKAGING DESIGN

MEMBER OF CIRCULAR PLASTIC ALLIANCE & ELLEN MC ARTHUR FOUNDATION

> 17% less packaging per consumer units (2020 vs 2006)

BIO-BASED MATERIALS GUIDANCE (>2019)



- Responsible sourcing and management of raw materials
- Use of sustainably sourced bio-based materials, when this is more sustainable than fossil resources

CORPORATE SOCIAL RESPONSIBILITY GUIDANCE (>2019)

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

- A.I.S.E. pilot project for household liquid laundry detergents
- 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

CHARTER FOR SUSTAINABLE CLEANING (>2005)

- Industry flagship initiative driving sustainable production, design & consumption
- Voluntary initiative, open to manufacturers and distributors
- Great majority of the market committed



> A unique logo for all our industry in Europe

> 12,2 billion units sold with all Charter requirements in 2020

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



> >60% of CO₂ emissions

come from the use phase during laundering and automatic dishwashing

> OPPORTUNITY TO FURTHER EMPOWER CONSUMERS FOR MORE SUSTAINABLE BEHAVIOURS

> 55% less CO₂ and 43% less energy in the production phase (2020 vs 2006)

CIRCULAR ECONOMY ACTION PLAN INCLUDING:

- Sustainable product policy and sustainable packaging,
- Substantiation of claims, sustainable consumption

CLIMATE ACTION



OUR VISION FOR CONTRIBUTING TO THE GREEN DEAL

This past year, A.I.S.E. has reconfirmed the central importance of the European Green Deal as the engine for driving Europe's recovery from the crisis. Despite the many challenges faced by companies in our sector this year, the industry remains fully committed to playing a leading part in the transition to a greener, more sustainable Europe and help close the loop on a truly circular economy.

A.I.S.E. welcomes the objectives of the Circular Economy Action Plan (CEAP), in particular the initiatives related to substantiation of green claims, empowering consumers in the green transition and the sustainable products initiative. We have contributed detailed learnings and recommendations to the Commission's stakeholder consultation process, and published positions on these individual initiatives. The CEAP is key to delivering on the objectives of the European Green Deal, and A.I.S.E. recommends a holistic approach addressing sustainability, circularity, consumers' and end-users' needs as well as industry competitiveness.



Proven and effective voluntary initiatives

In all of these areas, our voluntary industry initiatives, which have proven to bring meaningful and measurable improvements in our sector, are highly relevant and applicable. With consumer confusion growing as environmental and sustainable claims and logos proliferate, A.I.S.E. is supportive of the Commission's efforts to tackle greenwashing and to steer consumers towards better informed and more sustainable purchasing and consumption choices. Read more in the following pages.

Leading the way with our flagship sustainability initiative

Our flagship sustainability initiative, the longstanding A.I.S.E. Charter for Sustainable Cleaning, is a key initiative in this regard and supports the Commission's objectives for a circular economy and climate change mitigation. It is an established, proven, operational tool that helps effectively reduce the footprint of our sector, using a science-based approach, full life cycle assessment and transparent independent third-party verification. Moreover, the recent modernisation of the logo based on consumer research ensures it is relevant and recognisable, so that consumers can trust and have confidence in it.

The Charter, relaunched last year as the Charter 2020+, continues to offer the most advanced high-level sustainability reference scheme for steering best practice within the industry, building on the more than 15 years of experience since it was launched in 2005. The Charter covers both company and product standards, includes monitoring as well as reporting, and is keeping pace with innovations in company research and development.

As of June 2021, the Charter has more than 170 companies on board, including manufacturing companies (ordinary members) and distributors and retailers (associate members).

Best practice sharing

Best practice sharing is an important component of the Charter, and a second symposium will be held at the end of 2021 for Charter members, to share learnings and engage with external speakers, further driving the sustainable development of the detergents industry. The event will build on the success of the first Charter Symposium, held in February 2020.

Read more at sustainable-cleaning.com



Consumers can be assured that products carrying the Charter product mark meet high standards for efficient resource use, environmental safety, minimise waste and provide clear and transparent information on how to use products in a more sustainable way.

These include:

- efficient use of resources (for example by promoting more compact products)
- the environmental safety profile of the formulation (based on strict and conservative exposure assessments)
- the optimal use of packaging and content of recycled material
- the cleaning performance of the product
- the provision of best use tips to promote sustainable consumption

ACHIEVEMENTS SINCE 2006:

55% less CO₂ emissions per tonne of production

43% less energy use per tonne of production

17% less packaging

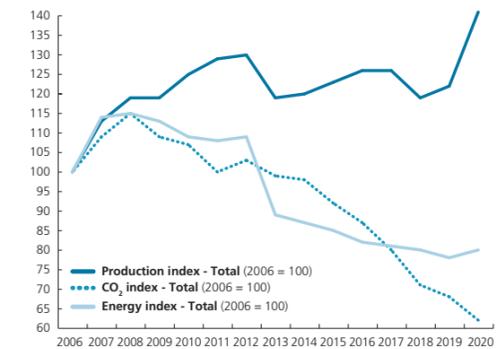
CHARTER 2020 KPI PERFORMANCE

The Key Performance Indicators (KPIs) shown in the table include the results from 2020 alongside those from selected earlier years since the launch of the Charter. KPI data is submitted by the Charter Ordinary Member companies and checked by the external consultancy Deloitte, ensuring both the integrity and the year-after-year comparability of the data; aggregated results are then provided to A.I.S.E. Companies submit their data for their twelve-month 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. The complete KPI table and more detailed commentary are available here: www.sustainable-cleaning.com

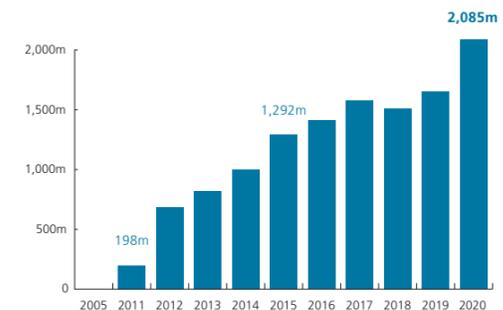
KPI	REPORTING DATA	2005	2011	2015	2019	2020
Participating companies	Number of reporting companies	8	72	100	102	112
	Manufacturing sites covered	62	172	183	184	193
	% vs Total	81.6%	94.0%	95.3%	94.6%	95.9%
	Production covered	7.3mt	12.0mt	11.4mt	11.3mt	13.1mt
	% vs Total	86.2%	98.8%	99.4%	99.4%	99.2%
	Units of consumer products sold (PC&H not included)	5,800m	10,600m	12,000m	13,200m	14,100m
Occupational health and safety	Covered by CSP Check	4,100m	10,400m	11,900m	13,000m	14,000m
	Accident frequency rate (expressed per 100,000 man-hours worked by all employees)	0.57	0.83	0.69	0.92	0.61
Poorly biodegradable organics ^(1,2)	kg / % of PBO chemicals ³ , according to the Charter PBO-list, per tonne of production	16.2kg/t	24.1kg/t	18.2kg/t	22.8kg/t	18.7kg/t
		1.6%	2.4%	1.8%	2.3%	1.9%
Energy consumed and CO ₂ emitted ⁽¹⁾	GJ of energy consumed per tonne of production	1.34GJ/t	0.91GJ/t	0.76GJ/t	0.70GJ/t	0.62GJ/t
	kg of CO ₂ emitted per tonne of production	80.9kg/t	52.0kg/t	50.0kg/t	37.5kg/t	29.6kg/t
Water consumed ⁽¹⁾	m ³ of water (potable and non potable) consumed	1.60m ³ /t	1.35m ³ /t	1.23m ³ /t	1.20m ³ /t	1.12m ³ /t
	Waste ⁽¹⁾	kg of waste produced (hazardous and non hazardous)	10.2kg/t	12.0kg/t	12.4kg/t	13.3kg/t
kg of hazardous waste sent off-site		3.2kg/t	3.8kg/t	4.1kg/t	5.3kg/t	5.3kg/t
Packaging used ⁽¹⁾	kg of packaging per tonne of production	78.0kg/t	91.3kg/t	92.6kg/t	98.1kg/t	95.2kg/t
	kg of packaging per thousand consumer units	98.2kg/KU	103.4kg/KU	88.0kg/KU	84.1kg/KU	87.5kg/KU
	Plastic packaging ratio ⁽⁴⁾ (of all packaging volume)	-	-	-	52.44%	50.93%
	Recycled plastic packaging ratio ⁽⁴⁾	-	-	-	8.52%	13.64%
Products with ASP logo	Ratio recyclable/reusable/compostable plastic packaging ⁽⁴⁾	-	-	-	80.69%	81.88%
	Number of household products placed on the market carrying the ASP logo	-	198m	1,292m	1,653m	2,085m

m=million - KU=thousand units - t=per tonne of production.
 1. Data apply to production covered by the CSP Check.
 2. As to the Charter KPI reporting, 25% w/w of fragrances are globally considered as PBOs and all non-ionic terephthalate polymers, even if a relatively large portion of those are easily or inherently biodegradable.
 3. Includes water.
 4. New KPI in place since introduction of A.I.S.E. voluntary packaging initiative in 2019 (see also p. 14)

ENERGY USE AND CO₂ EMISSIONS DECOUPLED FROM PRODUCTION



SINCE 2011, MORE THAN 12,2 BILLION PRODUCTS WITH INDUSTRY SUSTAINABILITY MARK!



Nature and scope of KPI data verification



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

TAKING THE INITIATIVE ON PACKAGING AND PLASTICS

A.I.S.E. has an ambitious agenda of activities that concretely support the EU vision for a new plastics economy in Europe. We are active in addressing the challenges involved and have undertaken several initiatives to reduce the impact of packaging and packaging waste across the industry and to increase the uptake of recycled plastic content in packaging.

Making all household plastic packaging recyclable, reusable or compostable

Our voluntary industry plastics packaging initiative, launched in 2019, sets demanding targets for the industry, with signatories committing by 2025 to use a minimum of 20% volume of recycled plastic material in packaging and to make all plastic packaging for household products recyclable, reusable or compostable.

Despite challenges such as delays in the delivery of recycled packaging raw material due to the pandemic, the nine reporting companies of the initiative increased their use of recycled plastic material in packaging from 9.26 % in 2019 to 15.87 % in 2020, reaching in total a volume of more than 59,000 tonnes of recycled plastic packaging material. With 85 % of their plastic packaging material being recyclable, reusable or compostable in 2020, we are rapidly approaching the two targets of the initiative. In order to continue in this direction, it is essential that markets are mature enough to ensure sufficient quality and quantity of recycled materials for all players.

Tackling plastics waste through the Packaging & Packaging Waste Directive

In December 2020, we submitted our contribution to the public consultation on the review of the Packaging and Packaging Waste Directive (PPWD). A.I.S.E. supports the revision of the existing requirements for packaging and the consideration of other measures to prevent unmanaged packaging waste and calls for all measures to be based on sound science and on the consideration of impacts across the full life cycle of the packaging. We participated in a workshop on overpackaging organised by the independent consultancy Eunomia in January 2021, and during summer 2021, A.I.S.E. will participate in five further workshops as part of the PPWD impact assessment study.

Read more on all of A.I.S.E.'s initiatives: www.aise.eu/packaging

Fostering voluntary industry initiatives

In line with our conviction that voluntary initiatives bring meaningful and measurable improvements towards sustainable development, A.I.S.E. has joined the Circular Plastics Alliance (CPA), and is actively contributing to its work on packaging and HDPE necked bottles. In February 2021, A.I.S.E. participated in a workshop by the CPA, and contributed to the response of the CPA to a question by DG Environment on how future EU legislation on packaging can help increase recycled content and reach the CPA target to boost the EU market for recycled plastics to 10 million tonnes by 2025.

Call to action to recycle bottles and sleeves



As part of its commitment to help increase the uptake of recycled packaging material, A.I.S.E. has developed an icon to appear on all plastic bottles using perforated full body sleeves, to encourage consumers to take the sleeve off the pack to facilitate recycling. The icon, which is accompanied by a call to action, was launched to industry in April 2021, and consumers can expect to see the icon on shelves as from end 2021/early 2022. A.I.S.E. has also shared this material with other industry sectors to aim for a common industry approach in this regard. Follow up information campaigns will be organised at local level to inform consumers on this and encourage them to "separate label and bottle for recycling".

Safeguarding the Single Market for the whole value chain

The whole European packaging value chain relies on the integrity of the Single Market to make the sustainable investments needed to enable the transition towards a circular economy. Following the commitment by European Commission President von der Leyen to deliver on the Single Market in her State of the Union address, A.I.S.E. and 58 other European and national organisations issued a joint statement calling upon the EU institutions to live up to this promise, prioritising the defence of the Single Market as the cornerstone of the European Green Deal and economic recovery.

Single-use plastics guidelines

A.I.S.E. fully supports the objective of the Single-Use Plastics (SUP) Directive to reduce the impact of certain plastic products on the environment, as well as the promotion of circular approaches aimed at reducing waste generation. Our sector supports a harmonised implementation of the Directive across Member States and has constructively engaged with the Commission in preparation of the guidelines. However, the current draft guidelines risk hindering rather than supporting companies' efforts to eliminate plastic waste and transition to a circular economy, and A.I.S.E. voiced its concerns in a joint industry statement in April 2021.

Encouraging "positive" packaging innovation

A.I.S.E. also joined other partners in the packaging value chain in issuing a statement calling for restraint in introducing new fiscal measures on packaging. While we fully support the policy objectives laid down in the European Green Deal to ensure that all packaging is reusable or recyclable by 2030, industry argues that further fiscal measures are not the most efficient tool to drive innovation and investments that are needed to meet the intended policy objectives of the Green Deal.

New test for fibre release

The Cross Industry Agreement (CIA) was established to jointly tackle the unintentional release of microplastic fibre fragments from textiles. In January 2021, and following extensive stakeholder engagement, the five CIA associations (including A.I.S.E.) completed work on a harmonised test that enables the collection and comparison of globally generated data. The CIA participants are now engaging with CEN, the European Committee for Standardisation, to advance the delivery of an official CEN standard, and aim to use the harmonised test method in new research as of 2021.



While research concludes that there are currently insufficient data to draw any meaningful conclusions about the toxicity of microplastic fibres, we now know that microplastic comes from a number of sources and not just from textile materials, that all textiles release potentially problematic fibre fragments and not just synthetic textiles and that fibre fragmentation can occur during, and be influenced by, all phases of the product life cycle and not just during laundering.

Read more about the research of the CIA at euratex.eu/cia

ADVANCING TOWARDS CLIMATE NEUTRALITY THROUGH CONSUMER EMPOWERMENT

This past year has seen the European Commission publish its first ever draft climate law and the EU reach agreement on a reduction target of 55% in net emissions by 2030 (vs. 1990), on the way to its declared goal to be carbon neutral by 2050. A.I.S.E. fully supports this goal and has been actively working to assess how we can contribute further.

In addition to the achievements already gained regarding for example the decoupling of production from CO₂ emissions gained via the Charter (with a reduction of 55% since 2006), the compaction schemes which enabled substantial CO₂ savings (from reduced packaging and transport), A.I.S.E. has set up a Climate Task Force in order to better analyse the total CO₂ footprint across the product portfolio, its origins, and more importantly, assess how to help lower it even further.

The use phase is known to be responsible for some 60% of the product footprint for laundry detergents for example and so we continue work in this area. A.I.S.E. has run a number of prominent campaigns to educate consumers about reducing their environmental footprint during the use

phase when washing and cleaning. These include our extensive, EU-wide "I Prefer 30°" campaign and our multilingual cleanright.eu consumer website which carries extensive and accessible information to encourage and guide consumers to clean safely and sustainably. Best use tips and www.cleanright.eu appear on billions of packs across European markets.

In our submission to the public consultations on the "Substantiation of green claims" and "Empowering consumers (and public buyers) in the green transition", we reiterated our learnings from conducting the PEF pilot study on household liquid laundry detergents. In particular, we have highlighted the tried and tested 'best use' tips voluntarily developed and applied by the industry, as well as our Charter for Sustainable Cleaning with its accompanying logo.



4 REGULATORY AFFAIRS

WORKING FOR A SUSTAINABLE, MORE COHERENT AND RELEVANT FRAMEWORK FOR ESSENTIAL PRODUCTS AND SERVICES

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A YEAR LIKE NO OTHER

A.I.S.E.'S PRIORITIES

supported by DUCC

- ▶ FOSTER INNOVATION AND SUSTAINABLE PROGRESS
- ▶ REGULATE BASED ON SOUND SCIENCE (I.E. HAZARD & RISK)
- ▶ NO NEW ANIMAL TESTING
- ▶ GLOBAL HARMONIZATION FOR HAZARD COMMUNICATION
- ▶ BENEFITS OF DIGITAL COMMUNICATION
- ▶ COHERENT ENFORCEMENT & SINGLE MARKET

EU PRIORITIES



CHEMICALS STRATEGY FOR SUSTAINABILITY INCLUDING:

- Safe and Sustainable by Design
- Revision of REACH/CLP

ZERO POLLUTION ACTION PLAN

DIGITAL AGENDA

Europe's Digital Decade

COMMISSION STUDY ON HAZARD INFORMATION SIMPLIFICATION AND USE OF E-LABELLING

COMMISSION STUDY ON THE DETERGENTS REGULATION REVIEW

BETTER LABELS, TOGETHER WITH ONLINE INFORMATION



ENSURING AN EFFECTIVE CHEMICALS STRATEGY FOR SUSTAINABILITY

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A.I.S.E. shares the goals of the European Commission's Chemicals Strategy for Sustainability, published in October 2020, to prioritise the protection of human health and the environment. As chemical ingredients are of course essential to safe and effective cleaning and hygiene products, A.I.S.E. has made it a top priority to contribute our industry's insights and expertise to ensure the strategy succeeds in contributing towards the EU's zero pollution ambition and the Green Deal.

Contributing the industry's insights and expertise

A.I.S.E. has been committed to contributing the expert views of the detergents industry (covering both the household and professional sectors) throughout the process of developing the Chemicals Strategy for Sustainability (CSS). We responded to the public consultation on the Roadmap in June 2020, added the industry's voice to an open letter in July under the lead of CEFIC, and reiterated our key messages in a press statement following the publication of the Strategy in October. We also formed a steering group within A.I.S.E. dedicated to the CSS and the Zero Pollution Action Plan, contributed to the public consultation on the Zero Pollution Action Plan, which closed in February 2021, and participated in an online workshop with stakeholders organised by DG Environment.

"The detergents and maintenance products industry in Europe is wholeheartedly committed to driving progress in sustainability. We call on all actors involved in the Chemicals Strategy to use science as the core principle to enable innovation."

Heather Barker, A.I.S.E. representative at the High Level Round Table on the CSS



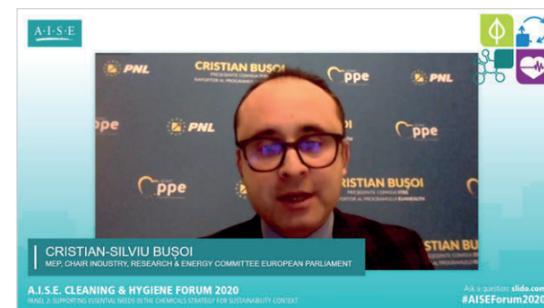
A.I.S.E.'s own annual [Cleaning & Hygiene Forum](#) in December, which attracted over 300 stakeholders, provided a valuable platform for constructive multi-stakeholder dialogue on the Strategy. Since then, our Vice President Heather Barker has been invited to join the Commission's High Level Roundtable on the implementation of the CSS. The Roundtable of 32 members brings together representatives from industry, science and civil society to advise the Commission on realising the Strategy's objectives and held its first meeting on 5 May 2021.

Read A.I.S.E.'s contribution to the High Level Round Table on [aise.eu](https://www.aise.eu)

Building on REACH & CLP and fostering innovation

A.I.S.E. supports the ambition of the CSS but emphasises the need for it to be based on sound science and safe use rather than hazard-based approaches. We appreciate the Strategy's acknowledgement of the REACH and CLP Regulations as the EU's cornerstones for regulating chemicals and welcome the increased attention to implementation and enforcement.

Priority topics we have identified for the detergents industry include generic restrictions and the 'essential uses' concept, new hazard classes for chemicals, the Mixture Assessment Factor and the registration of polymers – all of which will be subject to legislative proposals in the short term, namely by 2022.



"The European Parliament is open to a constructive dialogue so as not to jeopardise jobs and industry competitiveness, recognising citizens' safety and quality of products as very important. A strong and good partnership will continue to exist between industry and the policy makers."

MEP Cristian Buşoi at the A.I.S.E. Forum, Dec. 2020

The position of the downstream users of chemicals on the CSS is coordinated through the DUCC platform, [see p. 21](#)

DIGITALISATION – KEY TO BETTER LABELS AND BETTER CONSUMER INFORMATION

A.I.S.E. has been building the case for digitalisation of product label information for some years, to simplify crowded labels, ensure safe use and enhance consumer confidence in cleaning products. With the digital agenda now a priority for the Commission, this year saw us contribute to progress on several fronts.

Contributing to the Commission study on digitalisation & labelling

As part of its ex-post review of the Detergents Regulation and the Fitness Check on chemicals (excluding REACH), the Commission has initiated two follow-up studies: the first on the digital labelling for chemicals encompassing various products falling in the scope of CLP, and the second on the future of the Detergents Regulation. Both studies acknowledge the current discrepancy and duplication in labelling requirements, affecting detergent and maintenance products, and aim to identify solutions via digital tools.

A.I.S.E.'s research into the effectiveness of simplified labels for safe use communication on household detergents was recently published in the [International Journal of Consumer Studies](#).

This work was undertaken under the A.I.S.E. Better Regulation and Safe Use ('BRES') project, a long-term A.I.S.E. initiative aiming for better labels that consumers read, understand and will act upon. Research shows that consumers often spend only a few seconds reading the label regardless of content, due to overcrowded text and technical jargon. It also indicates that pictograms can be a powerful way to ensure vital information on safe use is conveyed.

A.I.S.E. has built on the experience of the BRES work through our Digitalisation Roadmap adopted in February 2020. This has included discussions on standardisation of ingredients nomenclature (e.g. relying on more INCI use), and how to provide valuable context to consumers on chemical ingredients, functions and safety profiles that may not be well understood. A.I.S.E. is fully supportive of the study initiated by the Commission on labelling and use of digital tools. The learnings from five years of our BRES project will be valuable here and A.I.S.E. is eager to continue contributing this knowledge.



Future of the Detergents Regulation

The main purpose of the second study will be to support the Impact Assessment to identify the policy options for the future of the Detergents Regulation and its implementation.

The Commission will carry out a problem mapping and analysis, considering three policy options: revision of the Detergents Regulation; repeal of the Regulation; or non-legislative options such as guidelines.

A.I.S.E. highlights that the ex-post review to the Regulation, finalised in 2019 by the Commission, concluded that the aims of the Detergents Regulation are relevant, that the rules are consistent and complete,

and that the Regulation has achieved its aims to a large extent. Thus, while there are potential areas for improvement (e.g. double labelling due to the entry into force of CLP), A.I.S.E. believes that these can be resolved via minor amendments to the Regulation or through guidance. The value of guidance is key in providing clarity for concepts that are not clear-cut and allowing for amendments considering the pace of innovation. A.I.S.E. remains engaged to contribute proactively and constructively to the Commission's studies.

Current developments under the Detergents Regulation

PRESERVATIVE LABELLING

In October 2020, the Commission tabled a proposal to align the legal text for labelling of preservatives to the requirements of the Biocidal Products Regulation (BPR) via a Delegated Act. This was to target the lack of clarity with regards to labelling of preservatives. The initial proposal aimed to align the Detergents Regulation to the requirements of the BPR and CLP Regulations.

However, following Member State consultation, a new proposed text to amend the Annex VII was shared in March 2021, which will oblige companies to label all preservatives coming from the raw materials in the formulations, regardless of the content in the final product, even at low trace amounts. A.I.S.E. is concerned that this will lead to overlabelling and lacks proportionality. Discussions will continue at the next Commission working group of experts to the Detergents Regulation in October 2021. A.I.S.E. continues to follow the issue closely.

FRAGRANCE ALLERGENS

A.I.S.E. contributed both to the targeted consultation and to the public consultation on the Commission's Roadmap for the labelling of fragrance allergens which closed in February 2020. The proposal foresees increasing the fragrance allergen list from 26 to 87. A.I.S.E. has engaged with the Commission to provide clarity on the implementation timeline for the detergents industry, which had not yet been confirmed officially as of May 2021. The Commission plans to draft guidance as an FAQ under the Detergents Regulation, to align with the timeline for cosmetics: three years for placing on the market and five years for withdrawal.

IMPROVING CLP AND REACH WORKABILITY

The Commission has assured industry that the Chemicals Strategy for Sustainability does not intend to overhaul the existing regulatory system for chemicals, but rather intends to strengthen and simplify it. To that end, A.I.S.E. has continued to work towards improving the workability of the two cornerstones of chemical legislation, CLP and REACH.

CLP workability solutions

Annex VIII to the Classification, Labelling and Packaging Regulation (CLP) concerns the harmonised reporting of information to Europe's Poison Centres. A.I.S.E.'s active engagement with the European Commission has helped secure a more workable regulation, which includes greater flexibility to print the Unique Formula Identifier (UFI) code and to report ingredients using an 'interchangeable component group', as well as support to the membership with guidance on the implementation.

A.I.S.E. was also involved in the consultation process to update ECHA's guidance on the implementation of Annex VIII, published in March 2021. The UFI codes have begun to appear on detergent products since 2020, and A.I.S.E. will collaborate with ECHA to raise public awareness of how to find the UFI code on a product. In the event of an accident, the UFI code will unambiguously help a Poison Centre to identify the product and its ingredients submitted by the manufacturer, to provide appropriate emergency response.

Both the first and second amendments to Annex VIII entered into force on 1 January 2021.

In-vitro testing

Lab testing began in 2020 in the latest stage of the A.I.S.E. in-vitro project, which aims to identify, validate and obtain regulatory approval for non-animal test methods for skin and eye hazards that are suitable for detergents, and maintenance products. This phase of testing sees 16 product formulations being tested according to a modified version of the OECD 491 guideline for the testing of chemicals. Depending on the outcomes of this phase of testing, a further 13 product formulations may subsequently be tested during 2021. It is hoped that this latest stage of the A.I.S.E. in-vitro project can determine if a modified version of the OECD test guideline 491 is suitable for use on detergent products.

Detnet - a collective industry approach for classification and labelling

DetNet provides members with access to toxicological test data (animal and non-animal) on many detergent and cleaning product mixtures. It facilitates the application of bridging principles, weight of evidence and expert judgement to classify non tested mixtures for eye and skin hazards under CLP. A.I.S.E. is exploring ways to reinforce and extend the DetNet database in preparation for an anticipated 'clarification' of the application of bridging principles in the revision of CLP under the Chemicals Strategy for Sustainability. Meanwhile ECHA's Enforcement Forum has launched a pilot project on the classification of mixtures, focusing on detergents and cleaning products; inspections will take place in 2021/2022 with a final report due in 2023.

Read more: www.det-net.eu

Member companies: 149 (EU, UK & EFTA)

Expert users: 215

Mixtures classified: 1,748



Launched 2013

UN GHS progress

The new programme of work on the UN Globally Harmonised System of Classification and Labelling of Chemicals (GHS) for the 2021-2022 biennium was approved in December 2020, and included the issues of key interest to A.I.S.E., namely practical labelling issues (including digitalisation of label elements), non-animal test methods for skin/eye corrosion and irritation and skin sensitisation, and practical classification issues (such as the use of bridging principles and the application of additivity). The 9th revised edition of GHS will be published in 2021 including all amendments adopted or confirmed at the December 2020 session.



Promoting safe use

Safe Use of Mixtures Information documents (SUMIs) are a valuable tool developed by A.I.S.E. that offers manufacturers supplying to the industrial and professional cleaning industry a standardised way to provide clear and accessible information to cleaners using the products on how to use them safely. This year, A.I.S.E. created a set of four short training videos, based on input from the REACH experts, to explain the tool to professional cleaning companies. The videos look at the relevance and practical use of the SUMIs and can be downloaded at www.aise.eu/sumi.



Which polymers require registration under REACH?

This year saw further progress on work to define criteria whereby certain polymers - currently exempt - would need to be registered under REACH. A.I.S.E. has provided input on the potential criteria and participated in the CARACAL sub-group meetings on the issue, in coordination with the DUCC Polymer Task Force and with Cefic. Broadly, industry and animal welfare groups are seeking to minimise the number of registrations and hence the related animal testing.

Restricting intentional use of microplastics

In February 2021 ECHA's Committees on Risk Assessment and on Socio-Economic Analysis (RAC/SEAC) finalised their opinions on a proposed restriction on intentionally-added microplastics. A.I.S.E. provided input throughout this three year process and now turns its attention to the European Commission - which will make a proposal to include this restriction in REACH Annex XVII - and supporting National Associations' dialogue with Member States, who will vote on it. The main priority is to secure workable transition periods to replace restricted microplastic ingredients and to minimise administrative burden for those derogated from the ban.

TACKLING DOWNSTREAM ISSUES THROUGH DUCC

As an active observer in the expert group on REACH and CLP known as CARACAL, the Downstream Users of Chemicals Co-ordination Group (DUCC) continued to contribute expertise and insights on REACH and CLP implementation, including on key topics that will be of importance also in the Chemicals Strategy for Sustainability. These include polymers, endocrine disruptors, the impact of digitalisation of supply chain communication, and generic Mixture Assessment Factors and their implications for existing Chemical Safety Assessments.



Downstream CSS priorities coordinated through DUCC

DUCC is contributing to the CSS on behalf of its 11 member associations. It made a separate submission to the public consultation on the Roadmap and has set up a Task Force to address specific topics common to all DUCC members - priorities include generic approach to risk management and the 'essential uses' concept, the Mixture Assessment Factor, new hazard classes for chemicals, 'one substance - one assessment', safe and sustainable by design and the key performance indicators.

Read more at www.ducc.eu

DUCC - REPRESENTING THE DOWNSTREAM INDUSTRIES FOR 20 YEARS

The DUCC group was founded in 2001 following the publication of the European Commission white paper on the "Strategy for a Future Chemicals Policy" and is now marking 20 years of work representing the interests of 11 member associations.

DUCC remains strongly appreciated by the EU authorities as the trusted unanimous voice of the "users" of chemicals. DUCC has been actively involved in the legislative process, contributing constructively to the new European chemicals policy debate and ensuring that all downstream users' needs are taken into account. DUCC is an accredited stakeholder to ECHA as well as a Caracal observer.

2001-2021

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A YEAR LIKE NO OTHER

BIOCIDES – PROTECTING US AGAINST HARMFUL ORGANISMS

Our industry and the biocidal products it manufactures have been on the front line in the battle to combat the COVID-19 pandemic. Early in the crisis, A.I.S.E. joined forces with other associations both to help facilitate supply and logistics issues and to proactively flag some regulatory workability issues that emerged.

Combining forces in the fight against COVID-19

In March 2020 as the virus spread across Europe, Biocides for Europe, A.I.S.E. and the European Association of Chemical Distributors, FECC, formed a Cross-Industry Alliance on COVID-19 to support industry and authorities in ensuring sufficient supply of disinfectants to combat the pandemic. The Alliance quickly developed a practical guide that sets out the main procedures for fast-tracking the availability of disinfectants in order to help fight the pandemic, while complying with the obligations under the Biocidal Products Regulation and equivalent national laws on biocides. The guide is updated on a regular basis, download it on biocidesforeurope.org/covid-19.



Availability of preservatives still at risk

The issue with in-can preservatives centres on isothiazolinones, which have been re-classified as skin sensitizers under CLP, meaning that for most isothiazolinones the specific concentration limit is set to 15 ppm. For industry this poses a major dilemma, as concentrations below this limit might not be effective enough to protect the products. At the same time, insufficiently protected products might not be allowed on the market for use by the general public.

A.I.S.E., together with CEPE and Biocides for Europe, having flagged the issue originally, has been actively supporting efforts to arrive at a solution. At the beginning of this year, we reiterated our position and submitted a position paper to Commission/ECHA proposing an approach specifically for skin sensitising active substances and we continue to contribute to the discussions through our Biocides Working Group.

New test informs guidance on insecticides efficacy

The A.I.S.E. Working Group on Insecticides contributed to the drafting of ECHA PT19 efficacy guidance, by conducting lab testing for the validation of the arm-in-cage (AIC) mosquitoes PT19 efficacy test. The test was integrated into the ECHA guidance and the results have since been published in the [Journal of Medical Entomology](#).



Testing BPR's workability

The past year has effectively been an extreme test of the workability of the Biocidal Products Regulation (BPR) and the Single Market for biocidal products. A.I.S.E. and its members have continued to demonstrate their commitment to fight the pandemic by maintaining increased levels of production for disinfectants throughout the year. The shortages for certain active substances and packaging materials at the outset of the crisis were gradually solved thanks to good cooperation with the European Commission and ECHA.

A.I.S.E. and its network of national associations across Europe working daily with EU and national authorities to secure adequate supply, with initial derogations through BPR Article 55 allowing producers to streamline the manufacturing process. These derogations were quickly decided by individual EU Member States, so maintaining close contacts with DG SANTE was necessary to ensure a harmonised approach. A.I.S.E. also supported the proposal from the Commission that Member States should provide forecasts on their needs for disinfectants, thus allowing industry to plan appropriately. Our association has maintained its high levels of production in order to respond to the demand. We remain in close contact with national and local authorities and address specific requests on a case-by-case basis.

Read more [p. 4-5](#)

MAIN CHALLENGES FACED BY THE BIOCIDES INDUSTRY DURING PANDEMIC

Production	Regulatory	Trade
<ul style="list-style-type: none"> Production capacity, lack of workforce Availability of materials, co-formulants Shortage of packaging 	<ul style="list-style-type: none"> Non-harmonised approach for derogations across EU Lengthy authorisation for biocidal products 	<ul style="list-style-type: none"> National borders Export limitations



"COVID-19 highlighted many problems with the workability of the BPR and hence the rapid availability of biocidal products. Different approaches were required in Member States, with complex authorisation procedures. A common and flexible EU-wide approach is needed to avoid a scarcity of vital products in future."

Giuseppe Abello, A.I.S.E. / FEDERCHIMICA-ASSOCASA

FOCUS ON THE SPECIFICITIES OF THE PROFESSIONAL CLEANING SECTOR

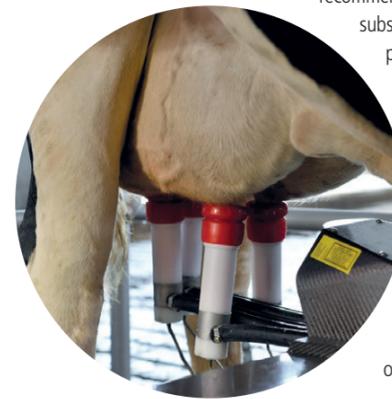
Ethanol harmonised classification and labelling

The Greek competent authority registered its intention to submit a harmonised classification and labelling (CLH) dossier for ethanol, as required under the review programme for biocidal active substances. The proposal would have a substantial impact on many disinfectant products, including for the professional cleaning sector, as confirmed by a survey of members conducted in early 2020, due to its classification as a reproductive toxicant Cat. 2.

The use of chemicals containing ethanol in the professional, industrial and consumer sectors can be regarded as low risk in terms of any reproductive toxicity based on toxicological risk assessments. A.I.S.E. formed a task force of experts and participated in an alignment meeting in February 2021 between the relevant associations and consortia, which led to the creation of a new common platform for sharing information on this topic.

Organic food production

The upcoming Regulation on Organic Food Production includes a positive list of authorised cleaning and disinfection products in Annex IV of the regulation. A.I.S.E. submitted a [position paper](#) to the Commission recommending criteria for the selection of substances instead of a less flexible positive list, and warning of the risk that it might drive applicants to switch to less effective products, resulting in a drop in hygiene and quality standards. Implementation of this annex has since been postponed to January 2024. A.I.S.E. has also contributed to the public consultation in April 2021 and remains engaged on the issue.



Guidance on Medical Devices Regulation

The new Regulation on Medical Devices is expected to come into application on 26 May 2021 following a postponement of one year due to the COVID pandemic. As it is particularly relevant for the professional cleaning and hygiene sector, A.I.S.E. has published a [guidance document](#) on the Medical Devices Regulation, developed together with German professional cleaning association, IHO. The guidelines are relevant for all companies producing cleaning and/or disinfectant products to be used on medical devices.



SCIENTIFIC AND RESEARCH PARTNERSHIPS

ERASM

ERASM is a joint research platform established by A.I.S.E. and CESIO (surfactants industry) that has carried out risk assessments on the impact of surfactants on the environment and human health for over 25 years. ERASM's Steering Committee is now analysing how its research can address areas targeted by the Chemicals Strategy for Sustainability (CSS). Current projects include, among others: biodegradability of surfactants under marine conditions; eye damage/irritation (in vitro approach); and a life cycle analysis for responsibly sourced palm oil. Once complete, research results are made widely available through scientific literature.

Read more on www.erasm.org



EPAA

The European Partnership for Alternative Approaches to Animal Testing (EPAA) is a unique voluntary collaboration between the European Commission, European trade associations (including A.I.S.E.), and companies from eight different industry sectors. A.I.S.E. has been an EPAA partner since its establishment in 2005. The vision of EPAA is the replacement, reduction and refinement (the "3Rs") of animal use to meet regulatory requirements through better and more predictive science. EPAA strives for scientific integrity, transparency and construction collaboration.

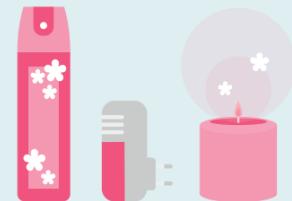
Read more on https://ec.europa.eu/growth/sectors/chemicals/epaa_en



OTHER VOLUNTARY INITIATIVES AND INDUSTRY GUIDANCE

INDOOR AIR QUALITY PRODUCT STEWARDSHIP

The A.I.S.E. Product Stewardship Programme (PSP) for Air Fresheners is a voluntary initiative that promotes best practices by companies placing air fresheners on the market. The signatories to the programme commit to manufacture air fresheners responsibly and to communicate to consumers in a clear and transparent way how to use them safely.



This commitment enables consumers make an informed choice when buying and using air fresheners.

Read more: www.aise.eu/air-fresheners

In January 2020, A.I.S.E. held a webinar to promote and explain the PSP to potentially interested companies, and a second webinar is planned for early 2022. In December, A.I.S.E. carried out the first audit of the PSP through an external consultant. All current PSP signatory companies were audited, and the audit was successful, demonstrating full compliance.

Oct - Dec 2017	165 million (incl. 17m combustible)
Jan - Dec 2018	514 million (incl. 66 m combustible)
Jan - Dec 2019	469 million (incl. 53 m combustible)
Jan - Dec 2020	439 million (incl. 40m combustible)

Air freshener products manufactured/placed on the market that are compliant with the PSP

LIQUID LAUNDRY DETERGENT CAPSULES PRODUCT STEWARDSHIP

The industry innovates constantly to ensure the safe use of products. In recent years, based on data from Europe's Poison Centres, the frequency of accidental exposures involving liquid laundry detergent capsules has decreased substantially. The downward trend is aligned with additional voluntary safety measures introduced as part of the industry's voluntary Product Stewardship Programme (PSP), including improved child impeding closures, an advertising code of conduct, a revamped consumer education campaign, and a more visually emotive yellow patch warning on packs. The PSP is implemented by seven signatory companies, representing 85% of the market.

The PSP is currently being revised to include new provisions related to emerging applications such as social media and e-commerce sales and further clarity on implementation practices. The revised program will be published later in 2021.

Read more: www.aise.eu/psp

Voluntary initiative to global standard?

A.I.S.E. is pursuing the development of a global standard with the International Organisation for Standardisation (ISO), which would see the PSP requirements for capsule and packaging characteristics become best practice worldwide. The process to develop an ISO standard is lengthy and time consuming and A.I.S.E. is working with the French national standardisation body to progress this.

Biodegradability of detergent film capsules



A.I.S.E. research on the biodegradability of polyvinyl alcohol based film used for liquid detergent capsules was published in [Tenside Surfactants Detergents \(Volume 58, Issue 2\)](#) and is available via open access. This peer-reviewed publication reports biodegradation data for the water-soluble grades of polyvinyl alcohol (PVOH) that are most commonly used for detergent capsule films.

Driving safe use at home

The industry's awareness campaign about the safe use and safe storage of laundry detergent capsules continues to be amplified by over 30 partners of the Keep Caps from Kids campaign. Partners include manufacturers, suppliers, child safety initiatives, and institutional organisations. Read more www.keepcapsfromkids.eu



SAFE USE OF DRAIN OPENERS

After five years of work, A.I.S.E. has closed its Drain Openers Task Force. The work of this group started in 2015 to assess and evaluate data from European Poison Centres and identify how the industry could proactively support the safe use of these products. To this end, A.I.S.E. worked in cooperation with Poison Centres in Sweden, Belgium, Germany, Italy and the Netherlands to derive accidentology data to identify the most effective measures.

In 2019, A.I.S.E. published [voluntary safety advice](#) to be implemented on pack by companies aimed at providing consumers with guidance for the safe use drain openers. Following this, the Italian Poison Centre published an abstract in the [journal of clinical toxicology](#) in which they concurred with A.I.S.E.'s findings on the point of accidental exposures of caustic drain openers. A.I.S.E. will continue to monitor the topic.



WHO'S WHO

A.I.S.E. BOARD (UNTIL JUNE 2022)

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Nadia VIVA
P&G



Vice-President
Heather BARKER
Reckitt



Treasurer
Arndt SCHEIDGEN
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Belgium, Luxembourg,
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Ana-Maria COURAS
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Virginie D'ENFERT
France



Thomas RAUCH
Representing the professional cleaning & hygiene sector



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



Thomas KEISER
Austria, Germany, Hungary,
Switzerland



Philip MALPASS
Ireland, United Kingdom

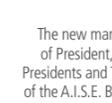


Anna OBORSKA
Czech Republic, Poland,
Slovakia



Mihaela RABU
Croatia, Romania

OBSERVER



Thomas RAUCH
Representing the professional cleaning & hygiene sector

The new mandates of President, Vice-Presidents and Treasurer of the A.I.S.E. Board are effective from 10 June 2020 until June 2022.

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SUSTAINABILITY

A.I.S.E. TEAM (AS OF JUNE 2021)

A YEAR LIKE NO OTHER

The A.I.S.E. team working from home in 2020 & 2021

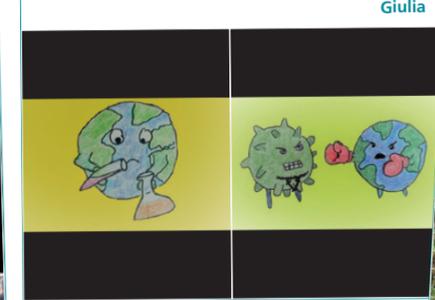
Through winter, spring, summer and autumn, the A.I.S.E. team have improvised home working environments, with greener views from the window, and furry friends as new colleagues, to continue our work. Here's what our year looked like.



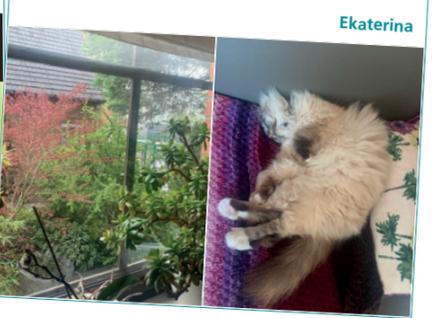
The A.I.S.E. team supports WHO's campaign on World Hand Hygiene on 5 May 2021 – "Second save lives – clean your hands"



During last year, I started writing and publishing stories about science during the COVID pandemic. These illustrations help to get the message across.



COVID period makes me enjoy my new office window view and my new colleague!



FOREWORD

A.I.S.E. MEMBERSHIP

A.I.S.E. NETWORK

CLEANLINESS & HYGIENE

SUSTAINABLE DEVELOPMENT

REGULATORY AFFAIRS

VOLUNTARY INITIATIVES & INDUSTRY GUIDANCE

A.I.S.E. BOARD & A.I.S.E. TEAM

A YEAR LIKE NO OTHER

My kind of morning date!



View from my window in Tervuren, Belgium. I've enjoyed being distracted sometimes during meetings by the ballet of blue tits coming to prepare their nest (in the right corner of this picture) for their babies. And then seeing them flying around to feed them... Glad to report that they've just all left the nest now!



While working at home and partly in the office, I've enjoyed more time following my horse riding passion with my daughter



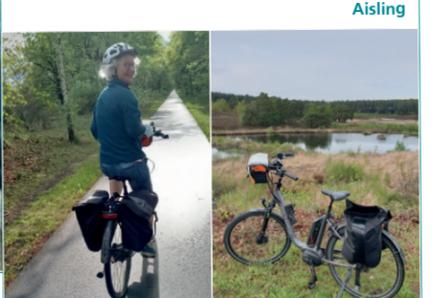
When my home office transforms itself into a jungle or circus playground... that will also be part of my COVID souvenirs...



My new colleagues, back from their lunch break, assisting me during the whole sanitary crisis!



The silver lining of the 2020 travel ban was that I discovered beautiful parts of Belgium by foot and on my bike. What a treat to take the time and enjoy so many beautiful local gems in Flanders and Wallonia.



My new colleague during a few months...



A new kind of laundry appeared on the garden line, viewed from my window in Waterloo, Belgium



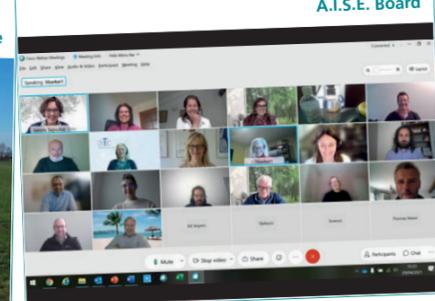
Having started with A.I.S.E. end of October 2020, I have gotten to know most of my new colleagues digitally and know some voices better than the faces. But it is working very well, and I look forward to meeting everyone "in real" when I can move to Brussels soon.



Leaving my dance shoes was hard, but time invested on the dance floor has been happily used on small roads and paths. No big parties with friends but more time to enjoy family life. In the end, one of the important things I really couldn't replace is the work atmosphere with the team.



The A.I.S.E. Board members follow the direction of the President's compass through virtual meetings, steering A.I.S.E.'s challenging workplan forward.



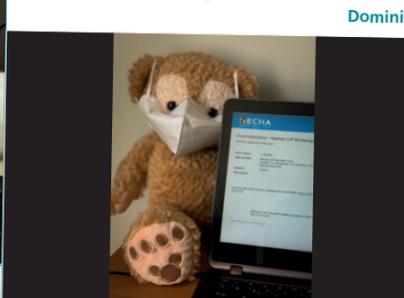
"A long way to consensus" Actually I never think when I sketch, and these came about in rather interesting times... we were going in circles in a Green Deal discussion, this was the result: introduction in red, replies in blue, flowing without shape, and in the end the ideas becomes clear and finite.



Working from home I missed my human colleagues but acquired a new neighbour – and a new supervisor!



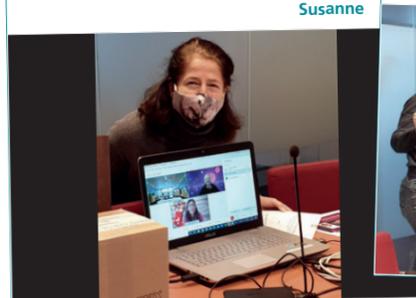
Health and safety at the workplace



A view behind the scene at the A.I.S.E. Cleaning & Hygiene Forum 3 December 2020 – empty meetings room converted into a recording studio to live stream the event.



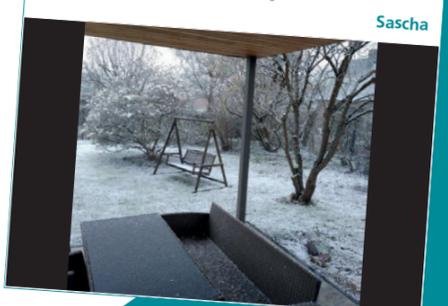
Exploring all digital options to connect with my team at Christmas time.



A rare opportunity for the team to get together, Christmas 2020 in the A.I.S.E. offices



View from my window in Namur, Belgium



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Read more and keep in touch

More details on all the initiatives in this report can be read on the association's website and social media channels

www.aise.eu



► From left to right: Aisling, Natacha (A.I.S.E.'s graphic designer), Barbara (from VFMW) and Valérie meet at an outdoor exhibition of 20 VFMW photos in the forest of Silly in Wallonia, Belgium, 20 June 2021.

VIEW FROM MY WINDOW PROJECT

MARCH 23 2020

As COVID-19 was spreading across the planet like wildfire, Barbara Duriau, a Belgian graphic designer, decided to create the Facebook group "View from my window" (VFMW).

The idea was to bring together people confined in lockdown all over the world. Connecting the confines of the planet! From their windows, Barbara asked them to capture their views and share them. It was an instant smash hit.

By 26 April 2020, 2 million people had joined the VFMW community.

In memory of this unique past year for all of us, we felt that the cover of our 2020-21 report could be inspired by this special initiative.

And even more so when we saw the quote from Kate, sharing credit for the value of the simple routines that our products can help achieve.

Our thanks go to Barbara and Kate for their agreement to share this now with the A.I.S.E. community.

www.facebook.com/groups/viewfrommywindow

www.viewfrommywindow.world



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