

A·I·S·E

International Association for Soaps,
Detergents and Maintenance Products



SECURING PATIENT SAFETY through professional cleaning & hygiene solutions in the healthcare sector

CONFERENCE AND HOSPITAL VISIT FOR EU MEMBER STATE AUTHORITIES

18 September 2019, CHIREC/Delta Hospital, Brussels
Susanne Zänker, Director General, A.I.S.E.

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A.I.S.E. NETWORK

REPRESENTING THE DETERGENTS AND MAINTENANCE PRODUCTS INDUSTRY ACROSS EUROPE

EU & UN PRIORITIES

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A STRONG NETWORK
of over **900**
COMPANIES

INDUSTRY'S RECOMMENDATIONS TO EU POLICY MAKERS

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

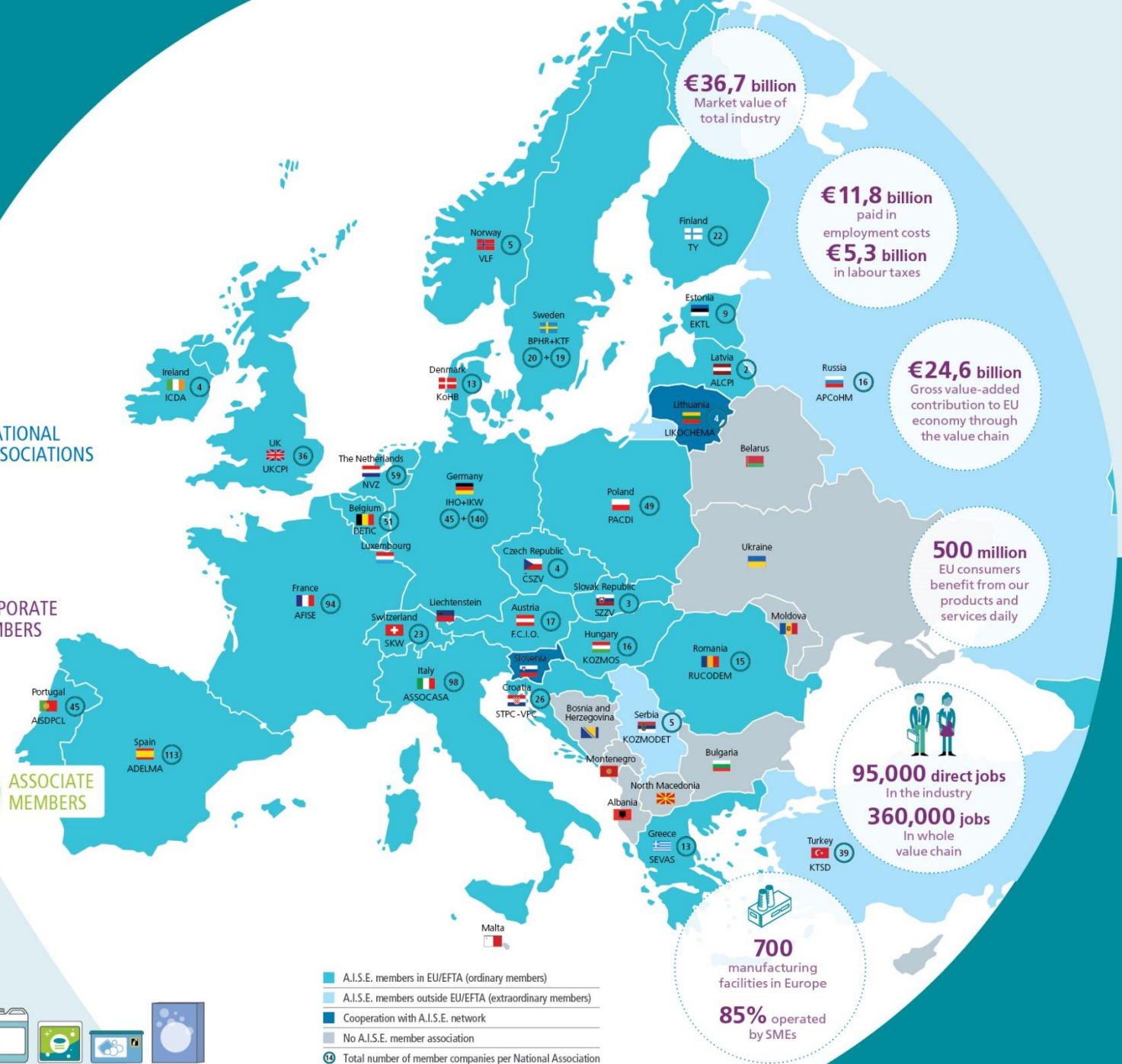
- A SCIENCE-BASED APPROACH
- A COHERENT LEGISLATIVE PROCESS
- AN INNOVATION-FRIENDLY FRAMEWORK
- A STRONG INTERNAL MARKET
- A RECOGNITION OF PUBLIC BENEFITS
- LONG TERM COMMITMENT TO SUSTAINABILITY



29 NATIONAL ASSOCIATIONS

17 CORPORATE MEMBERS

11 ASSOCIATE MEMBERS



€36,7 billion
Market value of total industry

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

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

500 million EU consumers benefit from our products and services daily

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

700 manufacturing facilities in Europe
85% operated by SMEs

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

See inside front cover for full list of membership

CLEANLINESS & HYGIENE

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

EU & UN PRIORITIES

3 **GOOD HEALTH AND WELL-BEING**

8 **DECENT WORK AND ECONOMIC GROWTH**

Jobs, Growth & Investment

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THIS INDUSTRY DIRECTLY BENEFITS PEOPLE IN MANY WAYS:

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

AT HOME
€29,1 BILLION
MARKET VALUE

KEEPING OUR HOMES CLEAN AND ENSURING OUR WELLBEING

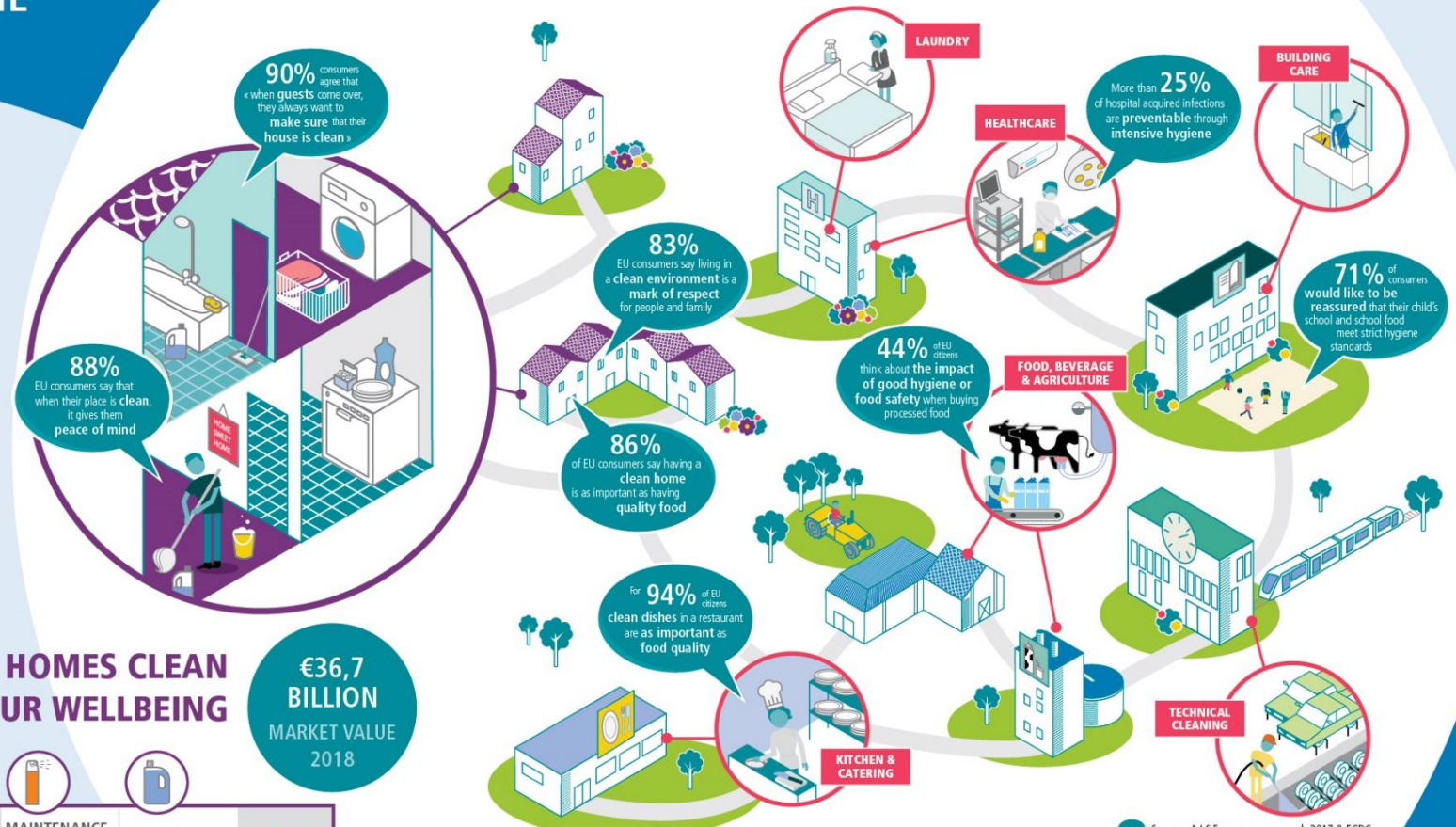
€36,7 BILLION
MARKET VALUE
2018

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

Source : Euromonitor (EU 28 + CH + NO)

FUNDAMENTALLY SUSTAINING SOCIETY WITH PROFESSIONAL CLEANING SOLUTIONS

OUTSIDE THE HOME
€7,6 BILLION
MARKET VALUE



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

PROFESSIONAL CLEANING & HYGIENE	HEALTHCARE	FOOD, BEVERAGE & AGRICULTURE	KITCHEN & CATERING	TECHNICAL CLEANING	BUILDING CARE	LAUNDRY	TOTAL
MARKET VALUE 2018 (BILLION €)	1,9	1,5	1,5	1,2	0,8	0,7	7,6
MARKET SHARE (%)	24.7	20	19.3	15.7	10.9	9.4	100
GROWTH (%) 2018 vs. 2017	4	8.5	4.4	-1.2	2.8	1.5	3.7

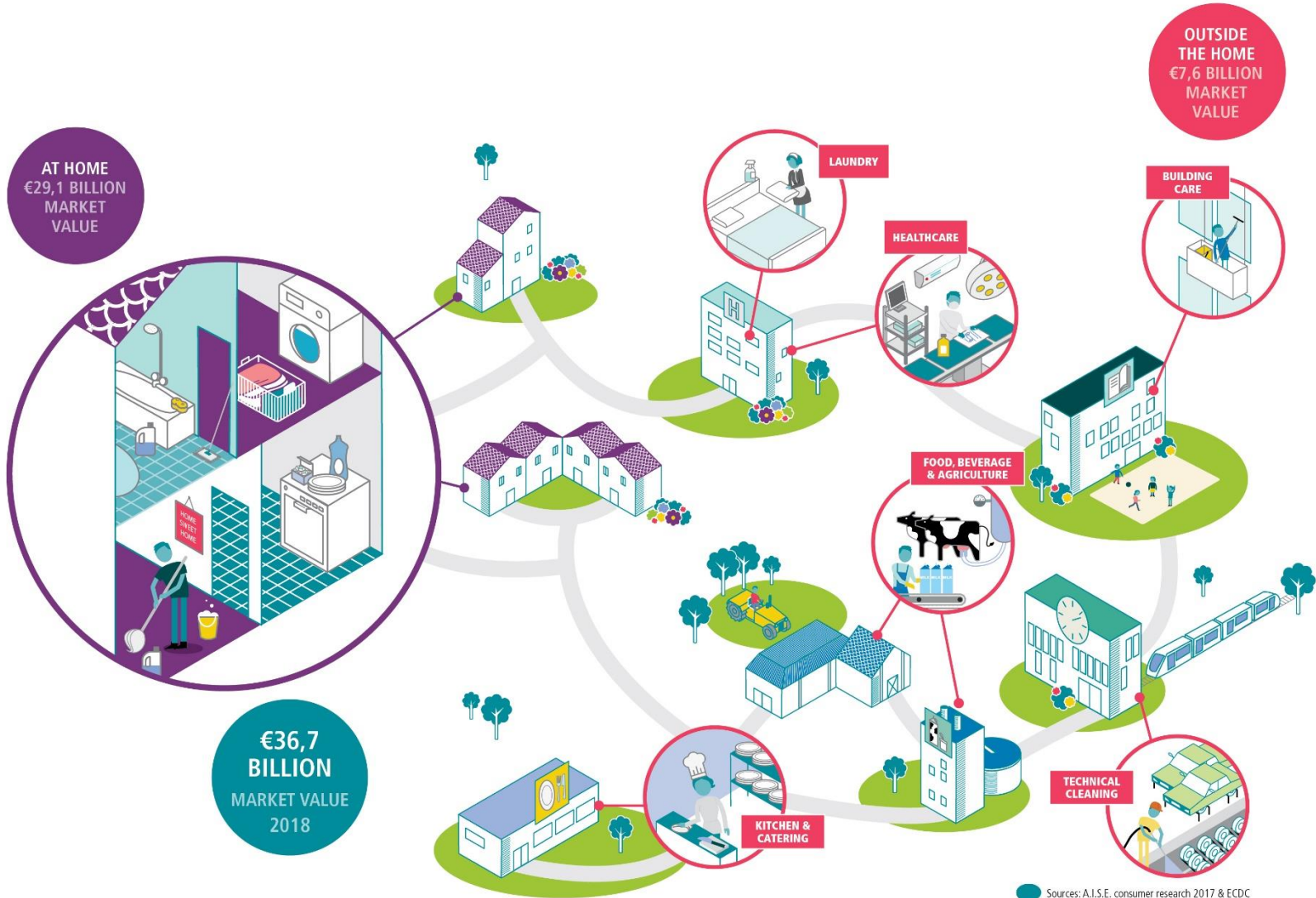
Source: A.I.S.E. national associations' data benchmarked with company experts estimation. Total EU + CH+ NO.

CLEANLINESS & HYGIENE

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

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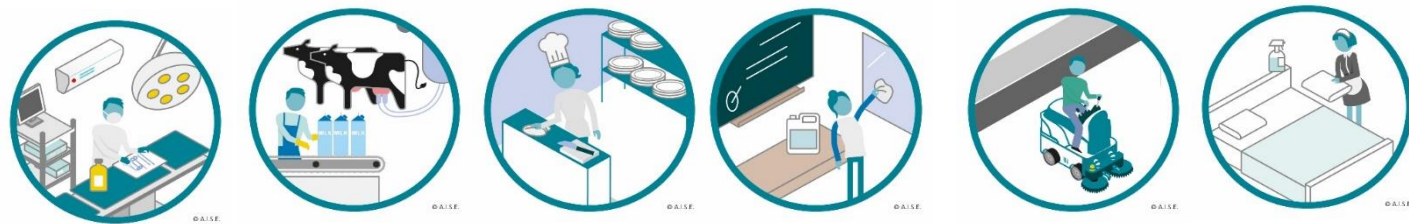
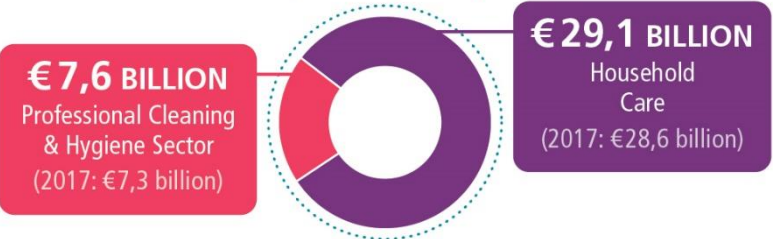


Sources: A.I.S.E. consumer research 2017 & ECDC



Health of the professional cleaning & hygiene sector

MARKET VALUE 2018
€36,7 BILLION
 Total industry
 (2017: €35,9 billion)



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Ensuring patient safety by infection prevention

Process

**PATIENT
SAFETY**

Personnel

Products

