

Cleaning Product Europe 2009



Cleaning Product Europe 2009, held from September 30 to October 1, 2009 and organized by Intertech Pira. It has been an intense two-day programme involving international players, gathering to give their view on detergency issues, which are many and greatly impact on our daily life and the environment. Yet again, sustainability was the major issue everyone was willing to face and debate on during the meeting, and all presentations dealt with it to some extent. The audience was particularly significant and sessions had high-profile moderators, such as Gerald Vollmer from the European

Environment Agency, Andrew Fisk from Procter and Gamble,

and Keith Rutherford from Unilever. Other household detergency and I&I

manufacturers such as Colgate-Palmolive, Ecover, Milliken, Reckitt Benckiser, Johnson Diversey, PZ

Cusson, Werner & Mertz, chemical companies such as Akzo Nobel, Basf, Ciba/Basf, Clariant, Cognis, Croda, Dow Corning, Dow Microbial Control, Genencor, Huntsman, Novozymes, Rhodia, Sabic, Schulke Mayr, Thermphos, Wacker, associations like AISE, the European Association for Soaps, Detergents and Maintenance Products, IFRA, the International Fragrance Association, media/PR agencies specializing in environmental issues, and consultants to the industry. A valuable source of information and analysis came from Euromonitor and Dragon Rouge, whereas noteworthy is the contribution from washing machine manufacturers through the presence of CECED (European Committee of Domestic Equipment Manufacturers). Of the conference was the need to face reality, a scenario dominated by the growing concern for the future of the planet, along with several proposals to develop a policy to pursue technological innovation in every area: raw materials and intermediates supply, new formulations with new ingredients, continuous innovation from detergents manufacturers, new packaging solutions, and new forms of logistics. Solutions that are generated by the new mentality and approach that permeates the sector, by the great efforts for the development of ever more advanced production and behavioural models, all this with the need to deal with increasingly demanding regulations for all detergency segments. Quotes from the closing speech by Keith Rutherford, Global Sustainability Director, Unilever, UK: "It has been an intensive 2 days listening to high quality presentations, which is good because urgency and sustained effort is needed to address the challenges created by the persistent growth and consumption of resources, accelerating especially as the developing and emerging markets grow. It's interesting and important to note that yesterday was Overshoot Day; we are now consuming what the earth cannot provide in 2009. By the end of the year, we will have consumed 140 percent of the resources Earth can generate in 2009. One year ago at this conference, we were awakening to the concepts of sustainability, this year we are understanding the intricacies of LCA, and carbon mitigation and more. Water will be the next big challenge, we ignore this at our peril – two thirds of the world's population will be water stressed in just 15 years time. I think all the speakers agreed that the consumer phase is the next major priority, and we will need to use all our resources as brand owners to help consumers make changes in their everyday lives. We will need to bring in new skills to our forums to tackle this – effecting consumer behaviour change and our behaviour change is a science requiring the very best. Innovation is the key to driving change, we need to constantly push for innovation for superior products, innovation for price, innovation that is a win for everyone, and innovation that is increasingly recognised by the younger generation. But, important in achieving this change is cooperation. We've seen many examples of where problems can't be solved alone – waste, in store dispensing, REACH, to mention just a few– but we must aim to keep momentum in these cross-industry collaborations. I've done some quick calculations, and it's taken us the equivalent of about 1 million washes for us to come here to this meeting. I think it's been very valuable, but we mustn't waste it. Take your knowledge and experience from this event, and use it to make a difference when you get home to your companies, and your families". So the consumer is what the detergency system is increasingly centered on, a consumer who is increasingly becoming the major driver of the market. Indeed choices are made according to economic data analysis and keeping in mind the current global scenario, yet we need to pay special attention to increasingly aware, motivated and environment-friendly consumers who make their choices ever more responsibly. Hence, communication must adapt accordingly, must lead consumers to new knowledge, not only centered on selling the product, but especially focused on "educating" the end user. Some countries are falling behind a little on these issues, and will need to catch up rapidly to keep the pace of the market. Labelling has a major role in this, as well as the creation of new information-sharing platforms where all parties involved can network and dialogue. There is new awareness over the fact we have to adjust to new and reduced energy consumption standards, with appliances that need to be adapted to these new standards. The market is aware of the availability of eco-compatible products, of the need for new washing criteria, as well as the fact that today's formulations must be based on ingredients that support such criteria. It's like a big jigsaw puzzle we are managing to put together piece after piece, day after day. Meetings like this one are precious and indispensable moments to network and exchange views, and need to be encouraged and supported. The industry is moving faster, supported by strong

motivation to work out the issues above and, ultimately, safeguard our future. This implies a growing need for information and training, for all. All parties involved need to commit. See you at Cleaning Products Europe 2010 in London.

The 6th Assocasa Observatory for the market of household detergents and products

The 6th Assocasa Observatory was held on October 22, 2009 at the Federchimica Auditorium in Milan. The Assocasa association represents around 100 Italian and multinational suppliers of household and industrial detergency products. It is an important economic sector, involving more than 6,000 players and accounting for a global turnover of over 3 billion euro. Vincenzo Vitelli, president of Assocasa, held a welcome speech to introduce the meeting, which was moderated by Debora Paglieri. The session then continued with presentations by Joseph Schirone, Prometeia's Head of Associations and Enterprises and Cetti Galante, Client Service Director of The Nielsen Company Italy. There were a lot of expectations for the meeting, after a year of uncertainty and unsteady market performance due to the global economic crisis, which has indeed directly involved people and their lives, thus has directly influenced sales of consumer products and the consequent decrease in production. Undoubtedly this sector, similarly to the food industry, provides end users with indispensable goods that one cannot easily cut down on, yet it is also true that recession, made even more difficult by the lack of jobs and reduced consumer expenditure, has seriously impacted on the whole supply chain. Employment issues were the focus of Prometeia's presentation, which highlighted how forecasts tell us that the worst is yet to come as regards the impact of recession on jobs. Regardless of the above, data provided during the 6th Assocasa Observatory for the market of household detergents and products [...] show that over the past 12 months the household segment has maintained a certain stability, despite the changes in the purchasing patterns of 72 percent of Italian consumers and the general decline in consumption caused by the current economic downturn [...]. The positive results replicate those of the last semester and are due to the efforts of manufacturers in keeping retail prices low and launching ever more performing products and formulations, always keeping a careful eye on sustainability. The detergents segment - worth nearly 2 billion euro on the retail market - has seen a slight contraction (-0.9 percent in value). There has been a steady decrease of laundry detergent powders (-9.7 percent) while the liquid detergents have continued their upward trend (+8.3 percent), favoured by consumers for their ease of use, followed by an 8 percent increase in the sales of water softeners and dishwasher products (+3.8 percent). Worth mentioning is also the growth of laundry soaps (+0.8 percent), a sub-segment worth 19.6 million euros. (+2.1 percent) thanks to a strong level of innovation as regards formulations. A particularly dynamic market is that of dishwasher care products (+7.1 percent), fabric softeners (+5.5 percent) and additives (+2.1 percent), (air fresheners, glass cleaners, furniture cleaners, cleaners for metals objects, etc.) show an increase in sales by 1.9 percent. Within this growth, we like to mention the steady, innovation-driven, growth of air fresheners, driven by the new electronic air fresheners, which add the pleasure of a nice fragrance and a pleasant atmosphere. Other segments that are booming are floor cleaners (+9.1 percent) and toilet cleaners (+4.2 percent). As for the household insecticide market, worth around 169.3 million euro, it has experienced a very positive growth of 7.2 percent, driven by electronic insect repellent diffusers. Despite the money-saving trend among consumers - confirmed by the growth of new promotions and a steady increase in private label sales and hard discount stores, with the latter reaching 4,000 selling points in Italy - Italians, even in a time of crisis, do not give up housekeeping and turn to companies providing both performance and sustainability through their products (source: The Nielsen Company Italy). Vincenzo Vitelli, President of Assocasa, stressed that the situation for detergent products, in the end stable in a somewhat



critical global scenario, underlines how increasingly committed companies are in meeting the ever more demanding expectations of Italian consumers. On one hand consumers look at product performance and effectiveness, yet on the other hand their awareness towards environment protection issues has greatly increased. Hence, innovation and development are the drivers for this market, which however still remains altogether positive. In conclusion, the day seems to give a whiff of fresh air to the players of a strategic consumer products sector, which indeed stands as an indicator of our economy. This doesn't necessarily mean the sky is clear again. However, we can expect that at the end of the global economic crisis the detergency production and distribution scenario will appear as having been strongly impacted by the recession, yet also ready to exploit the continuous innovation research has always been yielding to effectively meets new consumer demands, thereby triggering new business and market opportunities everyone will benefit from. In these terms, the Assocasa meeting has drawn some cautious optimism.

The MAPIC 2009 day

On November 4, the Federchimica Auditorium in Milan has been the venue for the MAPIC (Raw Materials for the cosmetic industry and additives for the cosmetic and pharmaceutical industries) 2009 day. MAPIC President Vincenzo Rialdi (Vevy Europe)

introduced the audience to the sessions of the day, which addressed the various aspects of the association's activities. Firstly, Marco Vassallo (FARCOS), MAPIC Technical Committee Manager, introduced MAPIC's Technical Committee to the audience. It was a lively and intense presentation, which gave voice to the many voices in MAPIC. The various work groups and their activities were presented and Mr. Vassallo stressed the need that all companies be involved and support the large amount of work to be done, and which will certainly increase in the foreseeable future due to the regulation-imposed deadlines. Chiara Pozzi from



Vincenzo Rialdi (Vevey Europe) - MAPIC President.

Federchimica comprehensively presented the CLP (Classification, Labelling and Packaging) Regulations and related deadlines and application aspects, whereas a stimulating presentation by Vincenzo Rialdi offered a proposal for an interesting methodological approach to shape new scenarios which, brought to the market - the cosmetic market in our case, would allow the implementation of effective and lasting action plans. Silvia Boracchi (AGER), one of the foremost experts on the topic at international level, illustrated what is surely one of the most delicate and controversial aspects in cosmetics today, animal testing and the animal testing ban, and presented and commented on the EffCI opinion on the Animal Testing Ban and Marketing Ban (August 2009), a document considered as the cosmetic industry guidelines on the issue. Indeed an intense day, followed with participation by an audience deeply involved with the issues of a most important Italian manufacturing sector, to the extent it is broadly recognized as one of Italy's excellences amongst MADE IN ITALY production, MAPIC includes forty members, 40 companies working to supply raw materials and additives for cosmetics and pharmaceuticals. The association, among the

latest created within Federchimica (2001), effectively addresses the many issues such a strategic sector for Italy's industry has to deal with everyday. Among the association's objectives are protecting members' interests and image, providing technical, scientific and economic assistance to members, representing members in the relationships with public and private institutions, other companies, foundations and any other national or foreign organisation. The Mapic Group has produced reference documents and guidelines for its member companies on a number of topics, such as allergens, animal testing, pharmaceutical excipients, botanicals or ingredients of natural origin, CMR substances in cosmetics and, of course, REACH-related issues. Mapic is a member of the EffCI (European Federation for Cosmetic Ingredients), which protects the interests of its members and closely works with the European Union cosmetic authorities and the European and international federations of the sector to support the development of a regulatory framework that reflects reality and can meet the current needs of the sector. To this regard, EffCI has published the GMP Guide for Cosmetic Ingredients 2005, a set of guidelines on Good Manufacturing Practices for cosmetic ingredients, which aims to lead manufacturers to achieving high processing and production quality standards.

"Creating tomorrow's detergents" Univar and Novozymes

Univar is a leading global company specialising in the sales, marketing, application and safe, efficient handling of a wide range of chemicals and ingredients for everyday use. The company's success depends on consistently providing in-depth market knowledge, expertise in application development and first class service to both its customers and suppliers - world class chemical and ingredient manufacturers. Today the chemical distribution sector is facing challenging times, not just because of the economic situation of this year, but because the market and manufacturers are increasingly demanding high product quality, reliable and readily available technical support and effective service. All these factors have a significant impact on customer satisfaction

and ultimately on the profitability of the products developed through the production chain. The REACH regulation has also been a challenge for the chemical industry and distributors have been playing a crucial and vital role in helping their clients prepare for it. In short, more than ever chemical distributors are expected to take the lead on and have a strong commitment to innovation today. All these elements

have always distinguished Univar throughout the company's history, and still do today. A recent event, organized by Univar Italy in Bologna, with the participation of Novozymes, a world leader in the production of enzymes, reflects well this global approach to chemical distribution. The

event, held on the 23rd of October 2009 in Bologna, attracted around 40 industry representatives in the field of detergents. A Novozymes panel, including Luigi Di Bella, Petr Kucera, Christian Wieth, Roberta Mustacchi, held a lecture entitled, "Creating tomorrow's detergents." Throughout the day, Novozymes presented their whole range of enzymes for detergents, in particular: Celluclean 4500 T (cellulase), Mannaway (mannanase) and a presentation on the synergistic action of lipases in detergents. Along with a presentation on the current trends and situation of the detergency market, the audience had the opportunity to learn about new liquid detergent formulations, solutions for the optimization of formulation performance, cost and profitability and, last but not least, the

outstanding contribution that enzymes can make in terms of environmental sustainability. Undoubtedly, today detergents are expected to play a leading role in safeguarding the environment and its resources, because the consumer is the first link in a chain of behavioural patterns that directly impact the environment. Hence, we need to provide end users with low-temperature



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washing detergents, which results in lower energy and water consumption. At the same time, detergents should be effective in removing stains and dirt that have previously always required the use of high-temperature washing cycles. In these terms, the use of enzymes has started a true revolution in detergency technology. The Univar-Novozymes event was the perfect opportunity for the participating detergent manufacturers to directly verify the market opportunities and potential of new cleaning systems, designed today for our tomorrow.

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HPC and Household Personal Care TODAY

What's new?

What's enhancing
our wellbeing?

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as a straightforward innovation in our future?

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