The 11th AOSDAC 2017 TAIPEI

ASSOCIATION DATA COLLECTION FORM

ASSOCIATION NAME: Accord Australasia

Data Categories		Contents (if applicable)	Remarks /Examples
A. Key economic statistic data	Population	24,651,862 (as of 14/09/17)	Source: www.abs/gov/au/ausstats/
	Population growth rate	1.4%	Source: The World Bank
	Land area	7.692million KM^2	Source: http://www.ga.gov.au/scientific-topics/national-location-information/dimensions/area-of-australia-states-and-territories
	2016 GDP	$1,204,616million USD	Source: The World Bank
	2016 GDP growth rate	2.8% increase between 2015-2016	Source: The World Bank
	Free Trade Agreements Signed	FTAs in force: • Australia-NZ (ANZCERTA or CER) • Singapore-Australia (SAFTA) • Australia-US (AUSFTA) • Thailand-Australia (TAFTA) • Australia-Chile (ACIFTA)	Source: Australia's Department of Foreign Affairs and Trade.

		• ASEAN-Australia-New Zealand (AANZFTA) • Malaysia-Australia (MAFTA) • Korea-Australia (KAFTA)	

		• Japan-Australia (JAEPA) • China-Australia (ChAFTA) <u>Signed but not yet in force:</u> • Trans-Pacific Partnership (TPP) <u>FTAs under negotiation:</u> • Australian-Gulf Cooperation Council (GCC) FTA • Australia-India Comprehensive Economic Cooperation Agreement • Environment Goods Negotiations • Indonesia-Australia Comprehensive Economic Partnership Agreement • Pacific Agreement on Closer Economic Relations (PACER) Plus • Pacific Alliance Free Trade Agreement • Peru-Australia Free Trade Agreement • Regional Comprehensive Economic Partnership • Trade in Services Agreement • Australia-Hong Kong Free Trade Agreement	
	Birth Rate	12.1births/1000 population in 2016	Currently in Australia, the birthrate has been gradually falling since 2008. Source: CIA Factbook.
B. **Industry condition and Market trend**	**Sector Features**	The local soap and cleaning manufacturing industry produces various cleaning products, including soaps, detergents, surfactants, polishes and specialty cleaning preparation products. Within this industry, 56% of output is sold to industrial, commercial and institutional users, 33% is sold directly to households and 11% are sold to the export market.	Source: Soap and Cleaning Compound Manufacturing IBIS Report, October 2016.

		Industrial/Institutional hygiene products sector	

Factor	Assessment
Market stage	Mature
Market size (2013)	$AUD 1.045billion
Predicted market size (2020)	$AUD 1.340billion
Market growth rate	ca. 2.5%
Key market issues	Price sensitivity; consolidation

Source: Australian Industrial and Institutional Cleaning Chemicals, Frost and Sullivan Report, July 2014.

Household Products Trends 2016

Source: Retail World Annual Report, December 2016.

	Dollars ($ Millions)	Dollars Growth % YA	Units (Millions)	Units Growth % YA
Air Care	169.7	-4.8	33.8	-3.8
Cleaners	321.3	-1.7	71.7	-0.4
Dishwashing	375.2	1.6	79.4	3.7
Fabric Care	116.8	0.7	30.5	-0.8
Laundry Detergents	493.2	0.7	61.6	-1.2
Laundry Dyes	1.5	0.5	0.1	-3.8
Soakers	145.3	-0.5	23.7	-0.5
Toilet Cleaners	118.6	0.7	33.4	4.2
Personal Care Products Trends 2016				
Deodorants	291.1	1.3	63.8	0.3
Facial Skin Care	291.9	3.1	35.3	4.3
Hair Care	543.2	-0.2	93.8	-1.0
Soap and Body Wash	363.4	-0.1	93.7	1.4

Key factors include the world price of crude oil, a higher real household

Sources: ‘Cosmetics, Perfume and

	Key Drivers Fueling the Growth	discretionary income, a lower trade-weighted index making Australian products comparatively cheaper in international markets, an increasing range of industry products being stocked in supermarkets and grocery	Toiletries Manufacturing IBIS Report, January 2017' and 'Soap and Cleaning Compound

		stores and an increased demand for specific types of cosmetics and toiletries e.g. 'environmentally friendly cosmetics'.	Manufacturing IBIS Report, October 2016'.
	User Behavior- Laundry		Sources: 'Retail World Annual Report, December 2014' and 'Retail World Annual Report, December 2015'.
		Segment % shares / Value 2014 / Volume 2014 / Value 2015 / Volume 2015	
		Liquid Laundry Detergent / 42.5 / 42.1 / 46.3 / 45.5	
		Powder Laundry Detergent / 54.0 / 56.6 / 50.8 / 53.7	
		Per Capita of Laundry machine ownership: 97.8% of households own a laundry machine (2014)	
		Ratio of hand-washing to machine washing: As almost 100% of households own washing machines, the only items that are normally hand washed are, 'hand wash only items' due to their construction and materials.	Source: 'Environmental Issues: Energy Use and Conservation, Australian Bureau of Statistics, March 2014'
	User Behavior- Dishwashing	Per capita of dishwashing machine ownership; 55% of households own a dishwashing machine (2014).	Source: 'Environmental Issues: Energy Use and Conservation, Australian Bureau of Statistics, March 2014'
		Auto	
		Segment % Shares / Value 2014 / Volume 2014 / Value 2015 / Volume 2015	
		Tablet / 70.9 / 56.0 / 73.7 / 56.2	Sources: 'Retail World Annual Report, December 2015' and 'Retail World Annual Report, December 2016'.
		Powder / 13.5 / 14.5 / 10.7 / 12.8	
		Rinse Aid / 6.8 / 15.0 / 6.5 / 14.7	
		Dishwasher cleaner / 5.3 / 9.5 / 5.9 / 11.7	

		Liquid	2.0	2.0	1.9	2.1	
		Dishwasher freshener	1.3	2.7	1.1	2.3	

		Manual					
		Segment % Shares	Value 2014	Volume 2014	Value 2015	Volume 2015	
		Concentrated	78.7	58.5	78.5	57.2	
		Regular	21.3	41.5	21.5	42.8	
	Other household cleaners	Segment % Shares	Value 2014	Volume 2014	Value 2015	Volume 2015	Sources: 'Retail World Annual Report, December 2014' and 'Retail World Annual Report, December 2015'.
		General purpose	23.8	27.4	22.1	25.6	
		Bathroom	19.1	17.3	17.7	16.6	
		Wipes	13.7	11.0	13.8	11.2	
		Spray Disinfectants	11.8	8.7	11.3	8.7	
		Liquid Disinfectants	9.9	13.4	9.4	13.4	
		Floor Cleaner	5.5	6.1	5.8	6.5	
		Mould remover	4.5	3.5	4.6	3.7	
		Window Cleaner	4.0	4.8	4.0	4.9	
		Oven Cleaner	2.0	2.3	2.0	2.3	
		Other (Minor)	2.0	1.0	2.0	2.3	
		Special Heavy Duty	1.8	1.6	1.8	1.7	
C. Association information	**Association Brief/Website**	Accord Australasia. Website: hhtp://accord.asn.au					
	Members List	http://accord.asn.au/about/members/					Our member list is publicly available on our website.
	Association Key Activities	Accord Australasia is the peak industry association for cosmetic, hygiene and specialty products. Accord's activities are centered around three goals: 1. *To operate as a highly performing, responsive, communicative and well-connected team (locally and internationally capable of*					

		efficiently delivering the industry's goals. Key activities under this include growing Accord's membership base, improving value add for members, strengthening outreach to stakeholders	

		and influencers, furthering our political engagement strategy and leading local and international consultative processes. 2. *To achieve minimum effective and internationally aligned regulation with no barriers to trade.* Key activities of this include consulting on significant reforms for industrial chemicals (includes household and personal care products), therapeutic goods (includes some disinfectants) and agricultural/veterinary products (includes dairy sanitizers), GHS for workplaces, and dangerous goods legislation. 3. *To promote the opportunities for technology and science to enhance the reputation of industry as an innovative solutions provider, enabling increased growth and investment.* Key activities include implementing programs with a focus on sustainability and innovation, continuing to work with identified partners on innovation and sustainability projects and continuing to grow and promote existing and develop new education and information websites.	
	2016 Milestones, Programs and Future Planning	2016 was a busy year for Accord, some of the key achievements included: • A new political strategy was actioned, • A program of new activities that focus on sustainability and innovation was developed and implemented, • Continued growth and promotion of Accord's Recognised environment credential scheme, • Continued active participation in significant regulatory reviews, • Undertook a lead advocacy role on the issue of plastic microbeads in personal care and cleaning products, • Undertook intense policy advocacy on the proposed ban on	

			animal testing in cosmetics,

		• Continued to pursue lighter touch regulation for key product categories such as disinfectants, dairy sanitizers and other everyday consumer products, • Hosted successful and well-attended industry events, and; • Published an information paper on palm oil and sustainability to cut through some of the complexities and misconceptions.	
D. Regulatory environment and major challenges/issues in country or area	**Regulatory Information**	In Australia, chemicals are regulated by a number of bodies at a local, state and federal level. The primary regulator is the National Industrial Chemicals Notification and Assessment Scheme (NICNAS) which assess industrial chemicals for health and environmental effects. It also regulates the importation of industrial chemicals and make recommendations for safe use. This covers ingredients in products such as dishwashing detergents, laundry powders, soap, cleaners, shower gels and other personal care products. The Australian Competition and Consumer Commission (ACCC) administers Australian consumer law and ensures that all products are safe for consumer use. For example, in 2013 the ACCC issued a public safety alert on laundry liquid capsules concerning the safety of children. At a state level, State Health Departments, implement the Therapeutic Goods Act and the Poison's Standard to regulate the risk management of chemicals on public health. For example, laundry powders and their pH levels. The Therapeutic Goods Administration (TGA) also regulates such products as instrument-grade disinfectants and sterilants, which	

		includes all low level, intermediate level and high-level instrument	

		grade disinfectants, as defined in Therapeutic Goods Order Number 54 (TGO 54). The Agricultural, Pesticides and Veterinary Medicines (APVMA) also regulates some of our members' products including domestic insecticides and dairy sanitizers. The federal Department of Environment is also developing a National Standard for Environmental Risk Management of Industrial Chemicals. Hazardous chemicals are managed in the workplace by the States and Territories through the adoption of model Work Health and Safety regulations. GHS was implemented in most Australian jurisdictions on 1 July 2017. The Australian States and Territories have responsibility for road and rail transport of dangerous goods in Australia.	
	Challenges and issues for cleaning industry	Accord represents an industry in Australia that is burdened by overly complex and fragmented regulatory system. There is often no clear boundary between different regulators, resulting in potential crossovers and added complexities of compliance. Australia's regulation is often out of step with other advanced economics, making it globally inconsistent. The majority of regulatory agencies are also 100% cost recovered from industry. Regulatory reform is therefore a very high priority for Accord. Other challenges and issues that Accord has been addressing this year include:	

		• Handling significant legislative matters that will be considered in federal parliament in times of political instability,	

		• Working with the government to reduce the flaws and shortcomings of the proposed industrial chemicals reforms, • Ensuring that any new reforms and regulations do not create any implications for innovation, investment, trade, business certainty and new product introduction for any member companies e.g. ensuring new laws and rules do not breach any WTO trade rules, • Pursuing evidence based and carefully calibrated advocacy strategies to achieved desired outcomes, • Working to safeguard the industry's public reputation, and • Pursuing opportunities and lighter touch regulation for products e.g. hard surface disinfectants and dairy sanitisers.	



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ASSOCIATION DATA COLLECTION FORM

ASSOCIATION NAME: China Cleaning Industry Association

Data Categories	Contents (if applicable)		Remarks /Examples
A. Key economic statistic data	Population	1.38 billion	
	Population growth rate	0.59 %	
	Land area	9.6 million KM^2	
	2016 GDP	USD 11.16 trillion	
	2016 GDP growth rate	6.7 %	
	Free Trade Agreements Signed		
	Birth Rate	1.295 %	
B. Industry condition and Market trend	Sector Features	Volume (Million Tons): Soap: 0.91 Laundry Powder: 4.46 Laundry Liquid: 3.05 Dishwashing Liquid: 2.90 Softener: 0.28	**Eg.** **Data/Trend of Amount/Volume/... by:** - Category: Household/Personal/Industrial/Ingredients - Product: Soap/Detergent/Softener/Bleach…etc
	Key Drivers Fueling the Growth		
	Segment/Channel Trend		

	User Behavior- Laundry	**Urban area** **Washing machine penetration:** >95%，key cities>97% **Frequency:** 6 times every week **Hand wash:** 20% **Rural area** **Washing machine penetration:** >60% **Frequency:** 3 times every week **Machine wash:** 20%	**Eg.** - Per capita of laundry machine (Front/Top load) - Laundry machine penetration (Per capita) - Liquid detergent usage - Consumption on detergent - Ratio of powder/liquid detergent (trend) - Ratio of hand-wash/machine wash.
	User Behavior- Dishwashing	Dishwashing machine penetration is still very low in China Mainland Dishwashing products are all liquid now	- Per capita of dish washing machine. - Ratio of soap/powder/liquid for dish washing.
	Others		**Eg.** Drying laundry market
C. Association information	**Association Brief/Website**	www.ccia-cleaning.org	
	Members List		
	Association Key Activities	Consumer education	**Eg.** - Plastic reduction/ Package improvement - Environment monitoring / Risk assessment - Clean campaign / Consumer education / International activities
	2016 Milestones, Programs and Future Planning		

D. **Regulatory environment and major challenges/issues in country or area**	**Regulatory Information**	-All kinds of Soap and Detergents: National or Industrial Standards. -Dishwashing and Food Contacting Detergents: Under NHFPC and CFSA regulations	- Cleaning product categorization and government adminitration attribution - Requirements, barriers or regulation for product importing. **Eg. Thiland:** - Household LIQUID detergents (including laundry, bleach detergent, floor/kitchen/bathroom cleaning…etc): Under FDA regulatiuon. - Laundry POWDERS: General industry standard - Softener/Air-freshener: Consumer Protection Regulation **Eg. Taiwan** - Laundry and general household detergents (except dish washing detergent): General industry standard - Dishwashing and food cleaning detergents: Under FDA regulations.
	Challenges and issues for cleaning industry		



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ASSOCIATION DATA COLLECTION FORM

ASSOCIATION NAME: **Indian Home and Personal Care Industry Association**

Data Categories	Contents (if applicable)		Remarks /Examples
A. Key economic statistic data	**Population**	1,349,611	
	Population growth rate	1.5 %	
	Land area	3.287 million KM²	
	2016 GDP	USD 2.9 Trillion	
	2016 GDP growth rate	7%	
	Free Trade Agreements Signed	1 January 2010	India hosted the latest ASEAN-India Commemorative Summit in New Delhi on 20–21 December 2012
	Birth Rate	_____%	
B. Industry condition and Market trend	**Sector Features**		**Eg.** **Data/Trend of Amount/Volume/... by:** - Category: Household/Personal/Industrial/Ingredients - Product: Soap/Detergent/Softener/Bleach...etc
	Key Drivers Fueling the Growth	1)Rural Consumption 2)Product Innovation 3)Price 4)Energy & Water Saving 5)Digital Marketing	

	Segment/Channel Trend		
	User Behavior- Laundry	Please refer the PPT	**Eg.** - Per capita of laundry machine (Front/Top load) - Laundry machine penetration (Per capita) - Liquid detergent usage - Consumption on detergent - Ratio of powder/liquid detergent (trend) - eRrtatio of hand-wash/machine wash.
	User Behavior- Dishwashing		- Per capita of dish washing machine. - Ratio of soap/powder/liquid for dish washing.
	Others		**Eg.** Drying laundry market
C. Association information	**Association Brief/Website**	www.ihpcia.org	
	Members List	List attached	
	Association Key Activities	www.ihpcia.org http://www.ihpcia.org/objective.html	**Eg.** - Plastic reduction/ Package improvement - Environment monitoring / Risk assessment - Clean campaign / Consumer education / International activities
	2016 Milestones, Programs and Future Planning	1. The 1st ICIS Indian Surfactants Conference - 21/22 September 2017 2. 5th International Conference on Soaps, Detergents & Cosmetics (ISDC 2017) at the Hotel JW Marriott Goa from 10-12 December 2017 (www.isdcconference.org	

D. Regulatory environment and major challenges/issues in country or area	**Regulatory Information**	1.Anti dumping duty on Soda Ash 2. Safeguard Duty on LAB from Qatar, Iran and China. 3.Safe use of Enzymes 4.Ban on use of phosphate in home care products 5.Restrictions on use of multilayer plastic packaging 8.Appeal to Ministry for increasing Refund of CGST Component 9. Intimation of Anti-Dumping Investigation concerning imports of "Saturated Fatty Alcohols" issued by the Directorate General of Anti-Dumping & Allied Duties. 10. BIS - **Request for publication of IS: 13498 (Bathing Bar) standard, soonest possible.**	- Cleaning product categorization and government adminitration attribution - Requirements, barriers or regulation for product importing. **Eg. Thiland:** - Household LIQUID detergents (including laundry, bleach detergent, floor/kitchen/bathroom cleaning…etc): Under FDA regulatiuon. - Laundry POWDERS: General industry standard - Softener/Air-freshener: Consumer Protection Regulation **Eg. Taiwan** - Laundry and general household detergents (except dish washing detergent): General industry standard - Dishwashing and food cleaning detergents: Under FDA regulations.
	Challenges and issues for cleaning industry	See below	

INGREDIENT DEFENSE:		

Topic	Goal	Issues
Preservatives	Consistent response and/or defendable use	The range of available preservatives appears to be diminishing and/or coming under more and more regulatory scrutiny in various countries, without a great deal of understanding/acceptance within communities of the role and/or value of preservation
Other bioactive ingredients?	Consistent response and/or defendable use	Are these too under threat and/or part of an emerging issue for the cleaning industry?
Potential/alleged endocrine disruptors	Consistent response and/or defendable use	Unsubstantiated claims and/or potential impacts have been circulating for some time
Triclosan	Consistent response and/or defendable use	
Antibacterial ingredients in hand hygiene products	Maintain availability of these products in consumer, healthcare & food handler uses	New safety and efficacy data requirements could lead to elimination from the market
Phosphate	Consistent response and/or defendable use	
Palm oil	Consistent response and/or defendable use	This is a complex issue with many facets
Fragrances	Consistent response and/or defendable use	Are fragrances used in cleaning products under threat in the various members' economies?

Nature-based products	Adequate implementation of the Nagoya Protocol	If the Nagoya Protocol is not adequately implemented, it could result in a heavy burden for natural-based ingredients and for innovation. This should be assessed by the different areas of the member companies represented by the ICPAIE members.
Chemical Weapons	Adequate Regulation minimizing Industry impact	The list of the substances that could be used as precursors of chemical weapons (Australia Group), could affect the Regulation of the chemicals used as ingredients in final products.
HEALTH & SAFETY:		
Topic	**Goal**	**Issues**
Safety/adverse event reporting requirements	Consistent requirements globally	
Animal testing	Maintenance of ability to test on animals to demonstrate safety of ingredients where no validated alternatives exist	Essentially a 'ban' of animal testing in cosmetic products in Europe has precipitated consequences globally for that sector and potentially beyond
Alternatives to use of animal data for hazard assessment	Expand use of in silico and read-across methods for hazard assessment	In silico and read-across methods have high potential to mitigate the use of animal test to fill data gaps for hazard assessment
Liquid laundry packets	Consistent data analysis and regulations	Levels of accidents with children can be relatively high, with relatively higher outcomes.
Risk based decisions for chemicals (vs. using	Final determination of safety	NGOs are pushing for de-selection of ingredients based on hazard along;

hazard alone)	decided by consideration of both hazard and exposure	governments and retailers are considering same approaches
Asthma	The safety of all suspected asthmagens be judged based on an evaluation using all data and consideration of exposures	There is pressure to deselect ingredients based on limited evidence of potential to cause asthma (usually just epidemiological evaluation)
Allergens		better suited under ingredient disclosure

LABELLING/CLAIMS:		
Topic	**Goal**	**Issues**
Safe use icons	Consistent safe use icons be used globally (also their placement, size, etc.). Developing economies utilize an existing set of icons instead of developing a new, regional set of icons.	Divergent safe use icons could inhibit international trade
Ingredient disclosure	Voluntary initiatives and/or requirements are accepted instead of prescriptive government or retailer mandates	Issues of disclosure to 1) poison centers 2) consumers, and/or 3) other stakeholders including retailers Some retailers are partially implementing disclosure policies for cleaning products (i.e. Walmart) though this is being addressed directly by member companies. For regions where mandatory or voluntary disclosure is already in place, the

		matter of fragrance ingredient disclosure is an issue.
Substantiation of certain key industry claims	Consistent global approaches and/or requirements	Are there any particularly current issues and/or specific claims for the cleaning industry worthy of the development of a global position?
SUSTAINABILITY / ENVIRONMENTAL:		
Topic	**Goal**	**Issues**
Microbeads	Consistent response and/or defendable use	The use of plastic microbeads are being phased out in personal care and cosmetic products due to their potential contribution to microplastic accumulation within certain waterways. The issue is causing collateral attention on other persistent ingredients in products as well as soluble polymers.
Wet wipes	Consistent response and/or defendable use	There are a range of issues here that have been raised in some economies e.g. by water authorities where non flushable wipes are being flushed into the sewage system
Extended producer responsibility e.g. packaging recovery	Consistent response and/or defendable use	Is this an emerging/current issue for members?
Environmental risk management frameworks	Consistent regulatory requirements	Australia is developing a new environmental risk management framework which could potentially result in some impacts on the cleaning industry (yet to be clarified if any)
Other potential emerging environmental issues e.g. environmental footprint calculations; specific packaging requirements and/or regulations	Consistent regulatory requirements	
UN Sustainable Development Goals	Consistent global approaches, initiatives and/or requirements	Analysis of goals with an impact in the Cleaning products industry (either positive or negative).

		Among others, Goal number 12 for Sustainable Consumption and Production is of particular interest
Sustainability reports	Share of Experiences	Exchange of experiences of sustainability reports (to identify possible synergies or harmonization of sustainability indicators)
Ethical sourcing		
OTHER:		
Topic	**Goal**	**Issues**
Trade agreements	Maximizing international trade	
Advertising – clearance requirements		
Nanotechnoloy/nano-ingredients	used in the cleaning products? any issues? any proactive work that could be of value industry?	
Biodegradability		



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ASSOCIATION DATA COLLECTION FORM

ASSOCIATION NAME: Japan Soap Detergent Association

Data Categories	Contents (if applicable)		Remarks /Examples
A. Key economic statistic data	Population	127,083,000 people	
	Population growth rate	-0.17 %	
	Land area	377,971 KM^2	
	2016 GDP	USD 4,605 billion	
	2016 GDP growth rate	0.3 %	
	Free Trade Agreements Signed		
	Birth Rate	1.42 %	
B. Industry condition and Market trend	Sector Features	Product : -Finished cleaning products for consumers Laundry detergent and soap Fabric softener, bleach and mildew cleaner Kitchen detergent, Hand/body soap Shampoo & Rinse -Fatty acid and Glycerin	**Eg.** **Data/Trend of Amount/Volume/... by:** - Category: Household/Personal/Industrial/Ingredients - Product: Soap/Detergent/Softener/Bleach…etc
	Key Drivers Fueling the Growth	Globalization, in bound	
	Segment/Channel Trend		

	User Behavior- Laundry	◆Washing Machine(2010→2015) ・Capacity: Increasing 7.4kg→8.0kg ・Function: Water saving , Hygienic ◆Washing Habits and Practices(2010→2015) ・Single rinse cycle: Rate of user 15%→35% ・Softener: Rate of user in each time 62%→77% ◆Changing in Laundry Detergents For Daily Use ・Detergent: Powder/Liquid 53/47→29/71	**Eg.** - Per capita of laundry machine (Front/Top load) - Laundry machine penetration (Per capita) - Liquid detergent usage - Consumption on detergent - Ratio of powder/liquid detergent (trend) - Ratio of hand-wash/machine wash.
	User Behavior- Dishwashing	◆Washing Habits ・Washing Machine user 30% ・Hand-washing user 70%	- Per capita of dish washing machine. - Ratio of soap/powder/liquid for dish washing.
	Others		**Eg.** Drying laundry market
C. Association information	**Association Brief/Website**	http://jsda.org/	
	Members List	http://jsda.org/w/00_jsda/1kaiin_1.html	
	Association Key Activities	- International Collaboration AOSDAC, ACI, INCPAIE - Product and Environmental Safety New Safe Use Icons, Risk assessment of Surfactants - Sustainability Voluntary Reduction in Plastic Use - Communication & Consumer Education Hand Washing Contest Class room Training and Seminar - Consumer Understanding Consumer survey on Home Laundry Habit and Practices	**Eg.** - Plastic reduction/ Package improvement - Environment monitoring / Risk assessment - Clean campaign / Consumer education / International activities

	2016 Milestones, Programs and Future Planning		
D. Regulatory environment and major challenges/issues in country or area	**Regulatory Information**	- Development of New Safe Use Icons - Revised Edition of Japan industry standard for Laundry detergents - Start of The 3rd Plan: Voluntary Reduction in Plastic Use	- Cleaning product categorization and government adminitration attribution - Requirements, barriers or regulation for product importing. **Eg. Thiland:** - Household LIQUID detergents (including laundry, bleach detergent, floor/kitchen/bathroom cleaning…etc): Under FDA regulatiuon. - Laundry POWDERS: General industry standard - Softener/Air-freshener: Consumer Protection Regulation **Eg. Taiwan** - Laundry and general household detergents (except dish washing detergent): General industry standard - Dishwashing and food cleaning detergents: Under FDA regulations.
	Challenges and issues for		

	cleaning industry		



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ASSOCIATION DATA COLLECTION FORM

ASSOCIATION NAME: Taiwan Soap and Detergent Association

Data Categories	Contents	
A. Key economic statistic data	Population	23,539,816 people
	Population growth rate	0.07 %
	Land area	36,188 KM^2
	2016 GDP	USD 539 billion
	2016 GDP growth rate	2.13 %
	Free Trade Agreements Signed	
	Birth Rate	8.37 %
B. Industry condition and Market trend	Sector Features (2016)	Liquid laundry detergent - Sales value: USD 99.2M, YOY growth 7.5% - Sales Volume: 62K tons, YOY growth 3.9% Softener - Sales value: USD 25.2M, YOY growth -2.3% - Sales Volume: 14K tons, YOY growth -9.4% Dish wash detergent - Sales value: USD 34.4M, YOY growth 5.9%

		- Sales Volume: 18K tons, YOY growth 2.8% Features: - For liquid laundry detergent and dish washing detergents, value growth is higher than volume growth, which means the demand of higher segment products is increasing. - Softeners, on the other hand, decrease year by year due to user behavior changing.
	Key Drivers Fueling the Growth	- International brands imported with strong channel advantage (e.g. Hankel in Costco first and then penetrating to other channels.) - Consumer's concern on detergent safety especially on food or dish washing detergent, which leads to green product or products with natural ingredients' appeals.
	Segment/Channel Trend	Hyper: - Premium wholesale player keeps strong momentum of expanding - Other hyper moves to smaller scale supermarkets expansion. Super: - Expansion of specific chain-supermarket (PX Mart) keeps going but slower than last year.
	User Behavior- Dishwashing	- Dish washing machine penetration is still low (<5%).
C. Association information	**Association Brief/Website**	http://en.tsdma.org.tw/default1.asp
	Members List	http://en.tsdma.org.tw/en/index.asp?au_id=1&sub_id=24#
	Association Key Activities	- Discussion with government on regulation and business related issues (e.g. tax, custom of raw materials; material safety) - Managing the participation of members to regional and international conference and offering communication platform - Supporting members to obtain up-to-date technical and regulation related information in industry from new website - Involving container recycling operation corresponding to environment protection policy of Taiwan government

	2016~2017 Milestones, Programs and Future Planning	- Dish-washing/food-cleaning detergent manufacturing GHP negotiation with FDA. - Green label regulation revising with EPA - Safety icon principle of chemical products with Ministry of Economic Affairs. - AOSDAC 2017 hosting. - Joining INCPAIE in 2017 - Sustainability: Plastic recycles rate monitoring.
D. Regulatory environment and major challenges/issues in country or area	**Regulatory Information**	Cleaning product categorization and government administration attribution - Laundry and general household detergents (except dish washing detergent): General industry standard - Dishwashing and food cleaning detergents: Under FDA regulations. Requirements, barriers or regulation for product importing. - Imported food/dish washing detergent need to comply the label regulation in Mandarin.
	Challenges and issues for cleaning industry	**Mature, saturated and competing home care market** - Low population growth. - Growing of premium wholesale market and chain super and fierce competition in between. - Substantial bargaining power of key players led to price competition of players and margin erosion. **Expanding focus on Branding and Marketing from Int'l Company** - Focusing/expanding on specific categories with new functions and appeals - Enormous investment on advertisement and channel promotion from international brands - Evolving packaging design and packaging size preference **Pressure from NGO and consumers about functional products** - Food safety issues led to skeptics on product safety concerns - Dish washing detergent case ■ Currently under FDA regulation ■ Government is working on strict regulation for labeling with food regulation standard.

- Imported products are also regulated which might face trade barriers.
- Obstacle to industry development from improper regulation

Popularity on cleaner/detergent with natural ingredients appeals

- Consumer preference kept moving to premium detergents with green appeals or natural ingredients without hazardous chemicals
- Product with natural appeals is still leading but government regulation is way behind
- Government keeps promoting green product, but regulation for green detergent are still disputed.



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ASSOCIATION DATA COLLECTION FORM

ASSOCIATION NAME: Malaysia Soap and Detergent Association

Data Categories	Contents (if applicable)		Remarks /Examples
A. Key economic statistic data	Population	31.7 million	
	Population growth rate	1.6 %	
	Land area	330,323 KM^2	
	2016 GDP	USD 250,372.9 million	1USD= 4.425 MYR
	2016 GDP growth rate	4.3 %	
	Free Trade Agreements Signed	-	
	Birth Rate	-0.9 %	
B. Industry condition and Market trend	Sector Features	**Household cleaning**	**Eg.** **Data/Trend of Amount/Volume/... by:** - Category: Household/Personal/Industrial/Ingredients - Product: Soap/Detergent/Softener/Bleach...etc
	Key Drivers Fueling the Growth	-	

Household cleaning

Market Size:	16' Value (USD' mil)	16' Volume	Value/Volumn Growth %
Laundry Detergent	220.4	197336	+8.8% / +4.3%
Laundry Soap	3.7	2955	-7.9% / -11.7%
Fabric Softener	53.9	51800	+12.0% / +6.9%
Dishwashing Detergent	42.3	41784	+4% / +4.4%
Other Cleanser	-	-	-

Personal Cleaning

Market Size	16' Value (USD' mil)	16' Volume	Val/Vol Growth %
Bar Soap	39.5	2434	+1.9% / -1.3%
Liquid Soap	120.9	8597	+11.4% / +9.9%

<table>
<tr><td rowspan="4"></td><td>Segment/Channel Trend</td><td></td><td></td></tr>
<tr><td>User Behavior- Laundry</td><td>
Total Detergent (by value)
<table>
<tr><th></th><th>2014</th><th>2015</th><th>2016</th><th>2014-16 CAGR%</th></tr>
<tr><td>Hypermarket %</td><td>24.9</td><td>23.9</td><td>22.4</td><td>-0.50%</td></tr>
<tr><td>Super/Mini market %</td><td>47.1</td><td>48.8</td><td>52.4</td><td>10.50%</td></tr>
<tr><td>Provision %</td><td>28</td><td>27.3</td><td>25.2</td><td>-0.60%</td></tr>
</table>
Total Shower Liquid (by value)
<table>
<tr><th></th><th>2014</th><th>2015</th><th>2016</th><th>2014-16 CAGR%</th></tr>
<tr><td>Hypermarket %</td><td>24</td><td>22.8</td><td>21.1</td><td>3%</td></tr>
<tr><td>Super/Mini market %</td><td>48.3</td><td>47.2</td><td>48.6</td><td>10%</td></tr>
<tr><td>Pharmacy %</td><td>19.3</td><td>20.5</td><td>20.5</td><td>13%</td></tr>
<tr><td>Provision %</td><td>7.7</td><td>8.7</td><td>9.2</td><td>20%</td></tr>
<tr><td>Chinese Med Hall</td><td>0.7</td><td>0.8</td><td>0.6</td><td>-3%</td></tr>
</table>
</td><td>Eg.
- Per capita of laundry machine (Front/Top load)
- Laundry machine penetration (Per capita)
- Liquid detergent usage
- Consumption on detergent
- Ratio of powder/liquid detergent (trend)
- Ratio of hand-wash/machine wash.</td></tr>
<tr><td>User Behavior- Dishwashing</td><td>Per capita laundry machine ownership : 93.8% (2016)
Ratio powder/liquid laundry : 63/37 value (2016)</td><td>- Per capita of dish washing machine.
- Ratio of soap/powder/liquid for dish washing.</td></tr>
<tr><td>Others</td><td>-</td><td>Eg. Drying laundry market</td></tr>
<tr><td rowspan="4">C.
Association information</td><td>Association Brief/Website</td><td>-</td><td></td></tr>
<tr><td>Members List</td><td>-</td><td></td></tr>
<tr><td>Association Key Activities</td><td>-</td><td>Eg.
- Plastic reduction/ Package improvement
- Environment monitoring / Risk assessment
- Clean campaign / Consumer education / International activities</td></tr>
<tr><td>2016 Milestones, Programs and Future Planning</td><td>-</td><td></td></tr>
</table>

D. **Regulatory environment and major challenges/issues in country or area**	**Regulatory Information**	Beauty Care : Cosmetic regulation - Name change : BPFK (National Pharmaceutical Control Bureau) -> NPRA (National Pharmaceutical Regulation Agency) a) Product label upload through Quest 3 - (Effective from 1 Aug 2016) - Requirement to upload product label when new notify into Quest3+ System - Requirement to update / upload product label for notified product (Deadline: 31 Dec 2017) b) Updated Annex II, III, IV, VI & VII in compliance to Commission Regulation (EU) No.2016/622, No.2016/1120, No.2016/1198, No.2016/1121, No.2016/1143 & No.2016/621 CLASS 2013 (Occupational Safety and Health (Classification, Labeling and Safety Data Sheet of Hazardous Chemicals) Regulations 2013) - Under Section 37 of Occupational Safety and Health Act 1994(OSHA 1994), gazetted on 11 October 2013. - Guidance to chemical suppliers for all chemicals used at work place	- Cleaning product categorization and government adminitration attribution - Requirements, barriers or regulation for product importing. **Eg. Thiland:** - Household LIQUID detergents (including laundry, bleach detergent, floor/kitchen/bathroom cleaning…etc): Under FDA regulatiuon. - Laundry POWDERS: General industry standard - Softener/Air-freshener: Consumer Protection Regulation **Eg. Taiwan** - Laundry and general household detergents (except dish washing detergent): General industry standard - Dishwashing and food cleaning detergents: Under FDA regulations.
	Challenges and issues for cleaning industry	-	