

ABIPLA 40  
anos  
DE HISTÓRIA

# 40 Years of History, Brightness and Growth



- Created in: 1976 – 2016 → 40 years
- Segments: *Domestic, Professional* and Raw Materials
- Representation: National and International (INCPA and AISE)



## Domestic Segment - Consumer Goods



## Professionals Segment



## Raw Materials



## Specialized services



**80 national and  
multinational companies  
of different sizes**

# Main figures



## Brazilian Industry of Cleaning Products

**5.2%** of the National Chemical  
Industry

Total - With Petrochemicals

**10.2%** of Final Use Chemistry

Without Petrochemicals

**Approximately 50,000 direct jobs generated**

In Dec 2015 = 47,218 employees

In July 2016 = 47,318 employees **+0.2% in 2016**

## Laundry Detergents

### BRASIL

Powder – 83%

Liquid – 17%

**4,5 kg/hab. year**

### EUROPA

Powder – 50%

Liquid – 50%

**8,4 g/hab. year**

### EUA

Powder – 20%

Liquid – 80%

**6,7 kg/hab. year**

**4<sup>th</sup> Largest cleaning products  
market in the world**

205 million  
people

**US\$ 5.9 Billion (2015)** \*Euromonitor

**USA** 319 million  
people

**US\$ 25.5 Billion**

**CHINA** 1.3 billion  
people

**US\$ 15.5 Billion**

**JAPAN** 128 million  
people

**US\$ 7.9 Billion**

**Global market:  
US\$ 139 Billion**





# Informal Market Action



## Informal Market Share - Percentage (2015)

	Sanitary Water	Disinfectant
Brazilian Informality - Percentage of Value	42,1%	30,6%



## Sectorial Estimated Loss - Consumption/Revenues

Featured Products	R\$ (k)
Losses in Consumption / Revenue	R\$ 1.418.768

**Informal = UNSafety and Health RISK**

## Government Estimated Loss - Taxes (2015)

Featured Products	R\$ (k)
Losses in Taxes/ Government	R\$ 716.082



**Formal = Safety and Health**

**Registration:** Ministry of Labor - more than 7,000 small, medium and large manufacturers / Anvisa - 3,626 authorized to manufacture

# REGULATORY OPPORTUNITIES

## Simple & speed to market

- Lead Time Reduction
- Notification instead premarket approval
- Less complex notification / registration process

- Less requirements (such as: FSC, GMP, SDS, samples)
- Online process

## Driving the Convergence

- Less & convergent mandatory information on pack
- More Flexible on Industry Standards/legislation
- Labelling according Risk Assessment

- Non Registration number
- Aligned Warning messages across

- Non positive ingredient lists
- Range formula declaration

- Convergent labeling based on risks
- Friendly to consumers understanding

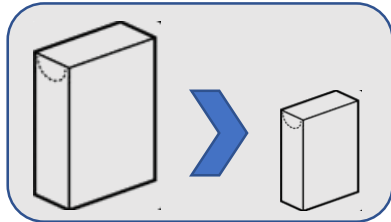
**Mutual Recognition**

# INNOVATION & SUSTAINABILITY

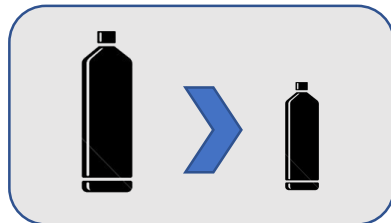


## Compaction & concentration

Powder detergent



Liquid detergent



Softeners



## The lenses of the opportunity



Economic financial impact



Packaging consumption



Electricity consumption



Water consumption



CO2 emissions



Trucks usage

**OBRIGADO!**

**THANK YOU!**

**GRACIAS!**

**Antonio Candido P. CALCAGNOTTO**  
**President – ABIPLA & ALIADA**

