



Sustainability Report 2007-2008

Absorbent Hygiene Products

Executive Summary



Prepared by:
The Absorbent Hygiene Products
Manufacturers Committee of Edana



Foreword from the Chairman

In 2007, the year of Europe's 50th birthday, we are delighted to present Edana's second **Sustainability Report**, an initiative of our Absorbent Hygiene Products Manufacturers Committee's (HAPCO) Sustainability and Environmental Working Group.



In the same year that the Treaty of Rome was signed, a Swedish firm, building on the first disposable diaper developments of the 1940s, developed a 2-piece diaper, which consisted of a disposable wad of shredded paper pulp covered with gauze which was inserted into reusable plastic pants. Heralded by mothers at the time as one of the greatest inventions of the 20th century, parents today can now enjoy the benefits of fifty years of research & development and innovation of this life-changing product, which has brought huge benefits to society in terms of hygiene, health, comfort and convenience.

This edition of the **Sustainability Report** is an update of the 2005 Report rather than a completely new report. We have sought to extend the amount of information available within the public domain about our industry and its impact on social, environmental and economic aspects of life in modern society. Our ongoing commitment means that we are continuously improving our sustainability performance and we are able to update the information contained in the 2005 Report with data from 2005 and 2006. We have also extended this report to contain data on the feminine care category of absorbent hygiene products; that is sanitary pads, pantliners and tampons. In future editions we plan to further extend the scope of the Report to include other nonwoven products used for hygiene care.

The launch of our **Sustainability Report** in 2005 was a significant landmark, for both our public stakeholders and our industry.

Edana members want to play their part in the public stakeholder debate on sustainability, a principle which we, as an industry, fully endorse. Despite the measurable progress over the years in their environmental profiles, our products have often been subjected to one-sided criticism; our **Sustainability Report** was a first important step towards correcting misinformation and misguided perceptions. The Report is also simply one of the many important testimonies to the fact that Edana members believe in the importance of sustainable development and are committed to striving for continual improvement in all of its aspects, be they social progress, environmental performance or economic growth.

For our members, the **Sustainability Report** was an important milestone as it was the first of its kind for the absorbent hygiene products industry, and indeed it is still unique in the world, demonstrating Edana's pioneering ethos and global leadership role. We hope that it will provide inspiration for, not only the absorbent hygiene products industry in other regions around the world, but also for other sectors of the nonwovens supply chain.

The absorbent hygiene products industry is keen to be among the best performers in terms of sustainability. We recognise that, although we have accomplished many achievements, the sustainability journey is ongoing and we are ever-mindful of our responsibilities to present and future generations.

Gerd Ries
Chairman of the Board of Edana

Foreword from the General Manager



Edana's mission is 'to create an environment beneficial to innovation and sustainable and profitable growth of the industry participants through dialogue with stakeholders and the active promotion of sustainable development, consumer/end-user interests and transparency'. This is fully in line with today's global drive for increased sustainable development.

The **Sustainability Report** is just one aspect of Edana's sustainability programme. We have established a Board Working Group on Sustainability which, composed of sustainability and environmental experts from our member companies, helps our members deal with sustainable development both at company level and as an industry, and provides guidance on the integration of sustainability across our business practices. Our conferences also provide our members with the opportunity to acquire increased knowledge and know-how on sustainability. Our annual Nonwovens

Symposium and OUTLOOK Personal Care Products Conference both feature dedicated sessions on our industry's practices, progress and challenges in sustainability.

The 2007-2008 **Sustainability Report** is part of an industry initiative to increase knowledge and understanding of the societal benefits and sustainability of absorbent hygiene products and personal care wipes and the social responsibility of the industry.

There can be no question about the numerous benefits that baby diapers, incontinence and feminine hygiene products bring to today's society, in terms of improved quality of life, cleanliness, healthier skin, independence, cost-effective convenience, and of utmost importance to incontinence sufferers, the additional essential benefits of mobility and dignity. In addition to outlining these undisputed societal benefits, this second edition of the **Sustainability Report** clearly demonstrates the important role absorbent hygiene products play in the two other key dimensions of sustainable development, namely, responsibility for the environment and maintenance of high and stable levels of economic growth and employment.

Member companies grouped within Edana have, for many years, been at the forefront of industry environmental management, for example, with the publication of Environmental Guidelines in the early 1990s, even before the introduction of the Eco-Management and Audit Scheme (EMAS). We have also established a tradition of voluntary industry cooperation and codes of practice in various areas such as product safety. In recent years we have demonstrated ongoing environmental awareness, with the investment of time and resources in several life cycles analyses (LCA) on baby diapers and incontinence products, and of course our first **Sustainability Report** published in 2005.

As a result of this early environmental awareness, and as a consequence of the many innovations introduced within this industry throughout the supply chain, the environmental impact of absorbent hygiene products has been measurably reduced over the past two decades, as illustrated by this report.

Our dynamic and fast-growing industry contributes considerably to the European economy and competitiveness, as advocated by the Lisbon Strategy. The European Council recently urged "Business leaders and other key stakeholders including workers' organisations and non-governmental organisations to propose an ambitious business response in support of the implementation of the EU Sustainable Development Strategy" (EU SDS) which addresses seven themes including sustainable consumption and production.

We are proud of these achievements in sustainability to date as well as being ever mindful of our ongoing responsibilities. Our industry supports responsible environmental stewardship in its manufacturing processes and acknowledges that our products do contribute a small fraction of the overall household waste stream. Manufacturers strive constantly to improve the overall environmental profile of their products, and waste reduction is a key focus area. Over the past 17 years the industry has achieved around a 40% reduction in the overall weight of baby diapers. Producers have ensured that the products are compatible with prevailing forms of household waste management. This commitment and the evidence in this report should be a source of reassurance for consumers and stakeholders.

Edana and its member companies endeavour to continue this positive trend and welcome the opportunity for open dialogue with responsible authorities at all levels, as well as with consumer and environmental organisations, to be part of the solution to today's sustainable development challenges.

Pierre Wiertz
General Manger, Edana

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1. Introduction

Since the first edition of our **Sustainability Report** in 2005, the question of sustainability has moved even higher on society's agenda and is at the forefront of many people minds, including our consumers.

In the first edition we provided information on sustainability issues as they relate to the manufacturers of baby diapers and incontinence products. We assessed the impact of our industry on all aspects of sustainability; be they social, environmental or economic.

This second edition of the **Sustainability Report** is an update rather than a completely new report. Our ongoing efforts mean that we are continuously improving our sustainability performance and we have been able to update the information contained in our first report with 2005 and 2006 data. We have also extended the report to contain data on the feminine care category of absorbent hygiene proucts; sanitary pads, pantyliners and tampons.

The report includes:

- The definition of sustainability we use as an industry
- A historic overview of the development of absorbent hygiene products
- The structure and composition of current absorbent hygiene products
- The societal benefits of absorbent hygiene products
- The industry's approach to social responsibility
- The environmental impact of absorbent hygiene products as measured by Life Cycle Assessments

- Our use of natural resources
- Waste management considerations
- Our approach to the use of broader environmental and financial instruments
- Economic data about the market and the industry
- Further reading and reference material

This executive summary draws out the salient points from the report for the reader who seeks an overview of the sustainability activities of the absorbent hygiene products industry. Readers are invited to gain further information by reading the full report which is available in PDF form at www.hapco.edana.org.

2. The Development of Absorbent Hygiene Products



People have needed products to contain bodily fluids since time immemorial so it is not surprising that the history of modern absorbent hygiene products dates back to ancient times. Today's absorbent hygiene products offer a level of sophistication, comfort and discretion unthought-of by previous generations but taken for granted today as an everyday essential of modern life by millions of people throughout the world.

The convenient **disposable baby diaper** is a relatively new invention emerging in the 1960s with wadding made from cellulose as the absorbent core, plastic backing and nonwoven material as the surface closest to the baby's skin.

Disposable diapers today are much thinner and more absorbent than their earlier counterparts and as a result are more effective. They are more comfortable for the infant to wear and more convenient for parents to use. In addition, their use has been accompanied by a marked reduction in skin irritation in individual children and a decrease in the spread of infectious disease amongst children in group care environments.

The product range has also been extended to provide support during an infant's toilet training phase with the introduction of training pants and pant diapers.

Disposable feminine care pads had their genesis during the First World War when nurses used wood pulp bandages to catch their menstrual flow, creating a pad that was made from easily obtainable materials and inexpensive enough to throw away after use. Successful commercialisation commenced in the 1920s, and since then the use of disposable menstrual pads has become pervasive in the industrialised world.

During the 1970s and early 1980s menstrual pad product development was significantly influenced by developments in baby diapers; as experience was gained in one field, it was rapidly incorporated into the other.

The menstrual pad concept was further developed and extended into the development of pantyliners, which are not primarily intended for management of menstrual flow, but are designed to handle body fluids at any time. This allowed the products to be much smaller, thinner and more discreet.

Industrially manufactured **tampons** were first introduced into the US market in 1936 and came to Europe in 1938. Initial tentativeness in the market, due to concerns about the impact of tampons on virginity and sexuality, was quickly replaced by broad product acceptance as women began to experience the increased freedom and flexibility of using tampons during their menstrual period for participating in work, leisure and sporting activities. Since then, billions of tampons have been sold all over the world.

3. Today's Absorbent Hygiene Products

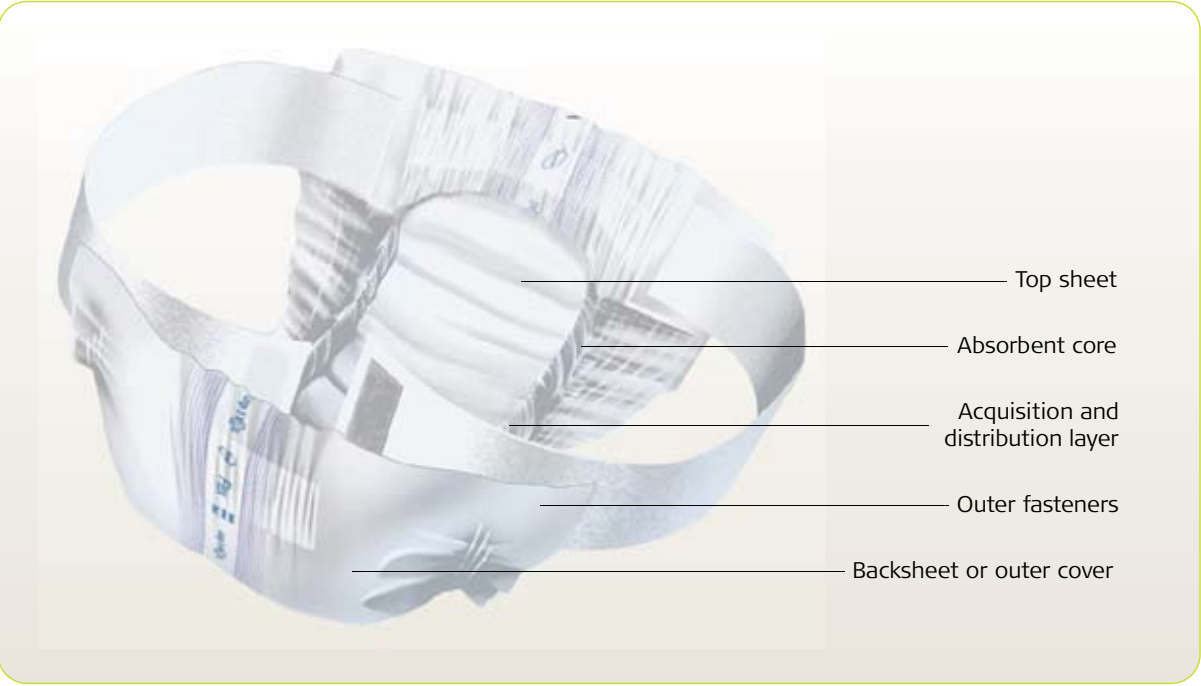
// Today's absorbent hygiene products offer a level of sophistication, comfort and discretion that is taken for granted by millions of people throughout the world. //

The principle function of tampons is to absorb the menstrual fluid intravaginally, after it has left the uterus, thus offering very discreet protection. They are either inserted with the finger (digital tampons) or with an insertion aid (applicator).

Absorbent products specifically designed for **adult incontinence** are the newest category of hygiene products. Their use in Europe began in the late 1960s. Originally adult incontinence diapers were mostly used in nursing homes and hospitals where they brought considerable advantages to both

patients and nursing staff. In recent years the retail market has grown significantly due to much greater awareness of the benefits of incontinence products and much less stigma about their use than in earlier decades. They are an important tool in enabling people with incontinence problems to maintain dignity and independence and live an active life. Over the years products have become thinner, lighter and more efficient and the product range has become more diverse to meet a wider variety of needs.

Diagram 01 Schematic View of an All-in-one Belted Incontinence Product



All absorbent hygiene products are designed principally to contain body fluids such as urine and menstrual fluid. The ability to contain faeces is also an important attribute in baby diapers and some incontinence products. The basic fluid management structure follows similar principles in all categories.

Fluid must be readily taken up, distributed and absorbed by the structure. Layered constructions and various materials are used to engineer these in-use performance requirements precisely. Materials selected must have appropriate properties and skin contact materials should be suitable for prolonged intimate use.

There are four principal functional layers, each of which is engineered to optimize overall product performance:

1. The **Topsheet or Facing** is the layer next to the user's skin and must be capable of allowing fluid to pass readily through to the next layer. Softness of feel is a critical attribute for skin contact material;
2. The **Acquisition & Distribution Layer (ADL)** transfers the liquid to the storage part of the ADL before it is diffused within the absorbent core structure;
3. The **Absorbent Core Layer** typically relies on an appropriate blend of fiberised fluff pulp and superabsorbent polymer to absorb and retain body fluids such as urine or menstrual fluids. The absorbent core in modern tampons is made of cellulose based absorbent material, of either rayon (viscose) or cotton, or a mixture of both;
4. The **Backsheet or Outer Cover** provides a fluid impervious barrier so that moisture is contained within the structure of the absorbent hygiene product. It is most commonly made of poly-ethylene film or nonwoven material or both, and can be made 'breathable' to help maintain good skin condition.

Whether it is as users, or carers, men and women around the world rely on absorbent hygiene products for convenience, comfort, discretion and hygiene.



4. Social Aspects of Sustainability

4.1 The Social Contribution

Absorbent hygiene products have become an indispensable feature of modern day living for all generations. Whether it is as users or carers, men and women around the world rely on absorbent hygiene products for convenience, comfort, discretion and hygiene.

Lifestyle and Convenience

Modern disposable baby diapers have made an important contribution to the quality of life of millions of people. Pervasive in their availability and acceptance, they provide convenience, comfort and skin care benefits. Today it is estimated that more than 95 percent of all parents in advanced economies use them and it is generally recognised that:

- modern disposable diapers are healthier for the infant's skin because their usage results in reduced skin rash incidences, skin irritation and infections;
- their softness, lightness and the breathable nature of some of the materials provide for superior comfort for the baby;
- they are easy to put on and remove, taking up less time, for example, than using cloth diapers;
- they are convenient because they eliminate the need for constant laundering at high temperatures to kill germs, and for drying.

Modern adult incontinence products have a significant positive impact on the quality of life of individuals suffering from incontinence. They enable users to maintain their sense of dignity and they give confidence, thus allowing their users to leave their homes, to work, to take part in social activities and to live a full and satisfying life. The product also offers security, comfort, discretion and odour control.

The benefits adult incontinence products bring to the health care industry are also considerable. They:

- help in infection control and minimise the spread of infection between patients;
- save valuable care assistant time in changing and disposing of products allowing more time for other important caring activities;
- save costs and time in reducing the need for care of infections and bed sores caused by wetness and leakage;
- save costs and time in washing soiled clothes and bed linen.

Modern absorbent feminine care products have significantly contributed to increased confidence for women during their menstrual periods, regardless of whether they choose pads or tampons. They:

- provide increased comfort, flexibility and discretion;
- are more absorbent and better fitting thus reducing the risk of leakage;
- draw menstrual flow from the top layer into the absorbent core resulting in a much drier feel for the user;
- contribute to odour control;
- contribute to less lost time from work or study as a result of menstruation;
- allow for increased mobility during the menstrual period, providing increased freedom to pursue leisure and sporting activities.



Skin Health Benefits (Graph 01)

Scientific evidence shows that the advances made in absorbent hygiene product technology have produced real benefits in skin care, dryness and leakage protection. While most of this research has concentrated on infants and diaper dermatitis, these benefits apply equally to incontinence sufferers and incontinence products.

Many paediatricians and nurses confirm that the number of infants seen with diaper dermatitis is declining over time. The number of cases of diaper rash reported in general appears to have decreased by about 50 percent since the introduction of disposable diapers. Within that decrease there has also been a large fall in the number of severe diaper rash cases reported, from 67 percent of all cases seen before the use of disposable diapers to 9 percent in the 1990s.

4.2 Industry's Social Responsibility

Product Safety

The principle that products must be safe for consumers, employees and the environment is paramount and guides our industry in raw material selection, product design, manufacturing, consumer communications and considerations relevant to the disposal of our products.

The industry not only complies with all relevant legal requirements but also, both as individual member companies and as a collective industry, conducts its own safety evaluation programmes to ensure that products are safe, including:

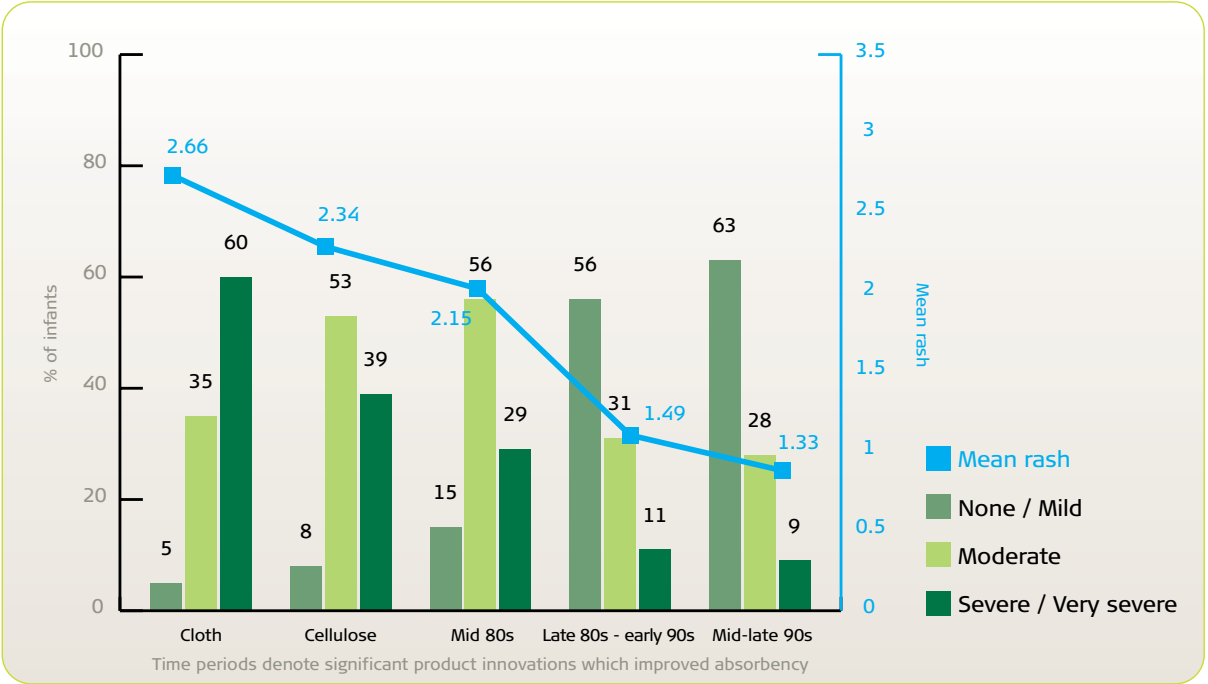
- the implementation of a voluntarily developed Tampon Code of Practice to ensure that there is harmonisation of important information provided to users of tampons, irrespective of the brand used;
- the formation of the UK Toxic Shock Syndrome Information Service to provide members of the public and medical professionals with factual and balanced advice on both menstrual and non-menstrual Toxic Shock Syndrome;
- exposure based risk assessments, for example of baby diapers in 2006.

4.3 Corporate Social Responsibility

The manufacturers of absorbent hygiene products are committed to respecting and often exceeding the requirements of the laws and regulations of the countries and regions where they operate. Member companies operate with due care to health and safety considerations, encourage diversity, deal fairly and actively manage environmental stewardship.

The industry recognises that it does not operate in a vacuum. Individual companies collaborate closely with local communities to work on projects that, among other things, address issues of incontinence, raise awareness of health and hygiene issues in girls and young women, give children a good start to life, address infant health issues, create local community partnerships and work collaboratively on environmental initiatives.

Graph 01 Product Innovation and Diaper Rash Reduction



“ Many paediatricians and nurses confirm that the number of infants seen with diaper dermatitis is declining over time. ”

5. Environmental Aspects of Sustainability

We are committed to improving the lives of consumers by providing superior products while continuously striving for environmental improvements by:

- using raw materials that are safe for consumers and the environment;
- supporting an integrated solid waste management approach;
- producing products which are compatible with different solid waste treatment options;
- working, where technically and economically feasible, to improve the environmental profile of absorbent hygiene products.

Product innovations have not only delivered significant product performance improvements but have also resulted in measurable improvements in their environmental profile.

5.1 Environmental Stewardship and LCAs

Trend analysis LCAs (Graph 02, Graph 03)

Using the Life Cycle Assessment method to generate a holistic picture of the environmental performance of absorbent hygiene products over time we have established that there have been significant improvements. For diapers for example:

- the average diaper weight has been significantly reduced by almost 40 percent in a period of 17 years, from around 65 grams in 1987 to 56 grams in 1995 and to 41 grams in 2005;

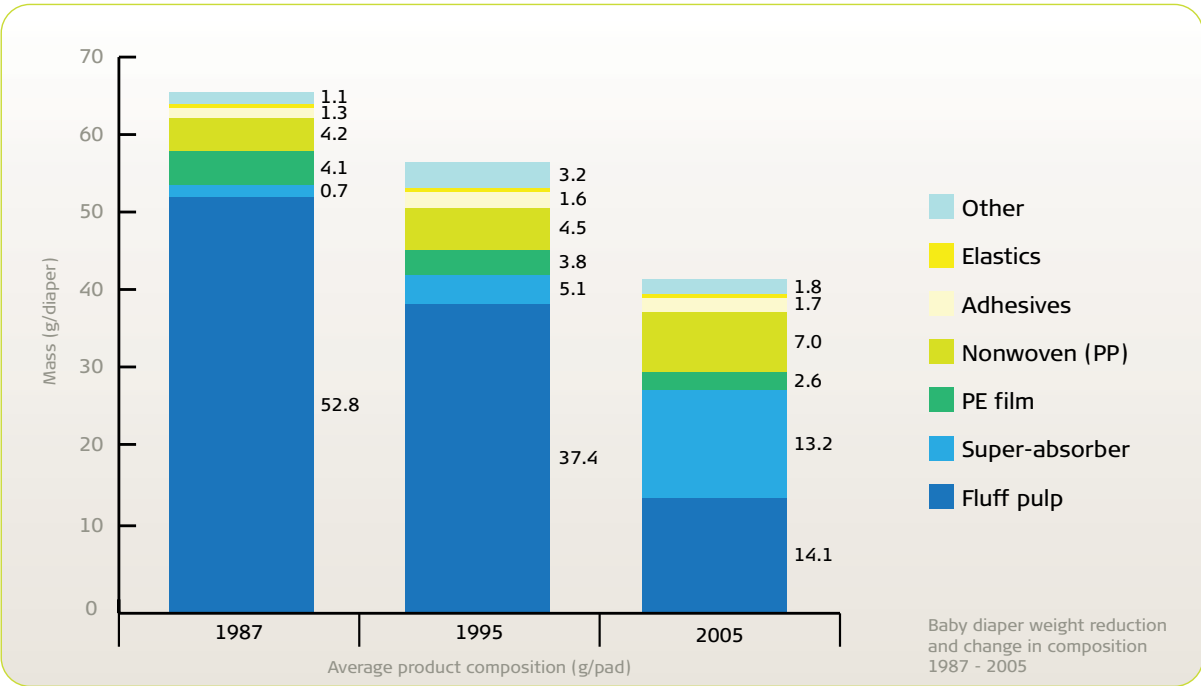
- the weight of packaging has been reduced by 41 percent from 8.0 kilograms per 1,000 pieces in 1987 to 4.7 kilograms per 1,000 pieces in 2005;
- there has been an overall reduction in the environmental impacts of using diapers over the diapering period of one child of 32 percent between 1987 and 2005; and
- the global warming and the summer smog impacts of diapers reduced between 1987 and 2005 by 37 percent and 43 percent respectively.

Similar positive trends have been shown with incontinence products and their packaging. Greater improvements in reducing the weight of the all-in-one incontinence products have been restricted by the test methods currently used for reimbursement systems and for some public procurement systems in Europe. These methods, such as the Rothwell method, favour products with high amounts of absorbent material. This works against product innovations that create thinner and better fitting products.

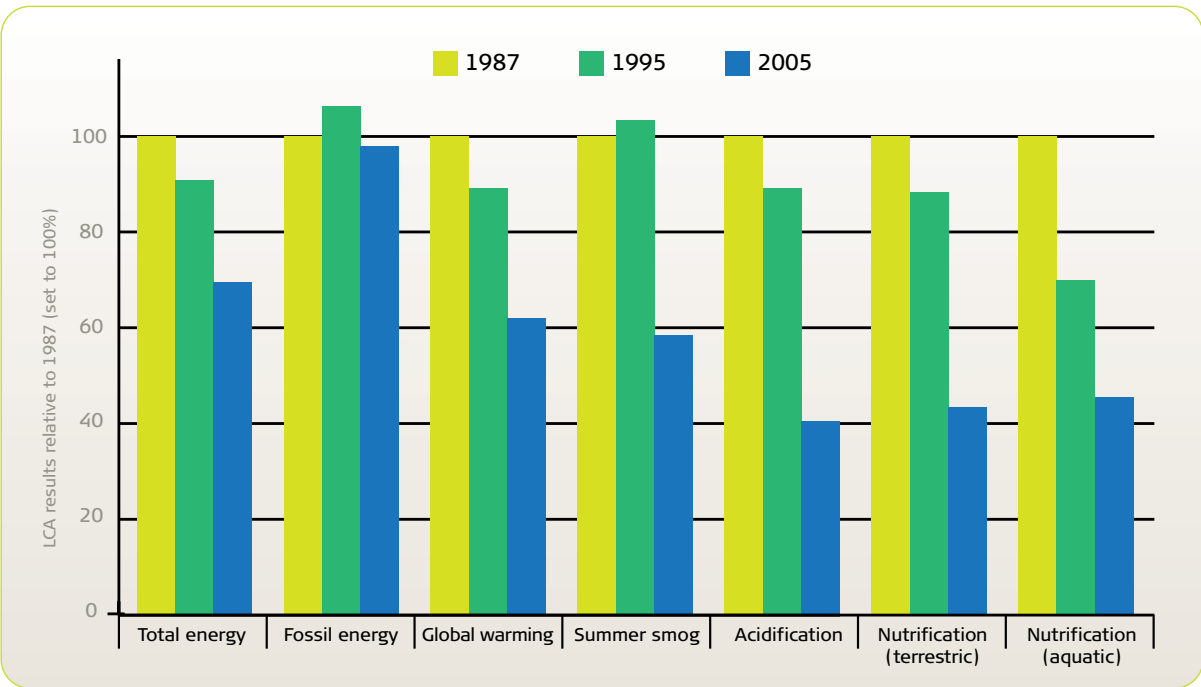
To date no independent LCA has been undertaken for feminine care products so there is no industry-wide data available at this stage. As far as pads are concerned, they have in the main undergone similar product developments to baby diapers and incontinence products. Changes in the composition of pads have seen a commensurate weight reduction of, for example, around 20 percent in maxi-size pads since the 1990s and in-house LCAs on pads by member companies have indicated the same overall environmental improvements for pads as for baby diapers and incontinence products.

Graph 02

Baby Diaper Composition



Graph 03 Trends for Major Environmental Categories for Baby Diapers 1987-2005



// There was no significant difference between the overall environmental impacts of the disposable, home-use reusable and commercial laundry systems that were assessed. //

**Comparative LCAs
Disposable and Cloth Diapers**

Assessments have also been undertaken by both industry and independent authorities comparing the environmental impacts of disposable and cloth diapers. None of these evaluations has established categorically the environmental superiority of any one diaper option over the other.

The most recent and most comprehensive analysis was undertaken by the UK Environment Agency and was reported in May 2005. The study found that:

- there was no significant difference between the overall environmental impacts of the disposable, home-use reusable and commercial laundry systems that were assessed;
- for all three diapering systems the impacts from waste management do not contribute substantially to overall waste totals in the UK;
- the global warming and non-renewable resource depletion impacts over the 2.5 years in which a child is assumed to be using diapers are comparable with driving a car between 1300 and 2200 miles.

The study encouraged disposable diaper manufacturers to focus on weight reduction and improvements in manufacturing materials and reusable users to focus on reducing energy consumed in washing and drying. We accept this responsibility and we continue to work on reducing the weight of absorbent hygiene products and, together with suppliers, making improvements in manufacturing materials.

**5.2
Prudent Use of Natural Resources**

The natural resources used to manufacture absorbent hygiene products are wood, cotton, crude oil, energy and water.

The wood pulp used in absorbent hygiene products represents less than one percent of total wood consumption. No wood from virgin tropical forests is used in the manufacture of absorbent hygiene products.

Pulp production is a high-technology multistage process which extracts the natural polymer cellulose from wood. It is largely self-sufficient from an energy perspective with by-products of the process being used to provide most, and sometimes a surplus, of the energy required by the production facility. Surplus energy can be used in combined heat and power plants.

Manufacturers of tampons represent a very small destination for world cotton and rayon production. Both the rayon (which is made from the cellulose of wood pulp) and the cotton used in tampons are natural-based materials.

Polymers derived from renewable sources can be used to produce compostable plastics. They have been available in limited quantities for many years and have generally been used to produce plastic films for use in packaging and organic waste disposal applications. These films can also be used in absorbent hygiene products. Currently there is a cost differential between polyolefin resin and resin derived from these polymers of a factor of one to three.

In a cost sensitive market such as absorbent hygiene products this presents a significant barrier. Currently cost and availability restrict the use of such materials to absorbent hygiene products within low volume specialized niche markets. This may well change however as availability increases and economies of scale emerge.

More recent developments have seen the emergence of fibres made from bio-polymers. Such fibres can be used in nonwoven applications and providing there is economic fibre supply these could be interesting developments for the future, which the absorbent hygiene products industry is monitoring.

**5.3
Absorbent Hygiene Products and
Waste Management (Graph 04)**

Much of the discussion about absorbent hygiene products in Municipal Solid Waste focuses on baby diapers. In those households where disposable baby diapers are used, they naturally seem to represent a significant proportion of what goes into the bin. However, only one in 14 households on average will be using diapers at any one time.

Current estimates are that baby diapers make up about 2 percent of municipal solid waste (MSW) in Europe. By comparison paper and board, garden waste and food waste each comprise between 18 and 20 percent of MSW. Waste from absorbent hygiene products only comprises around 0.5 percent of total solid waste.

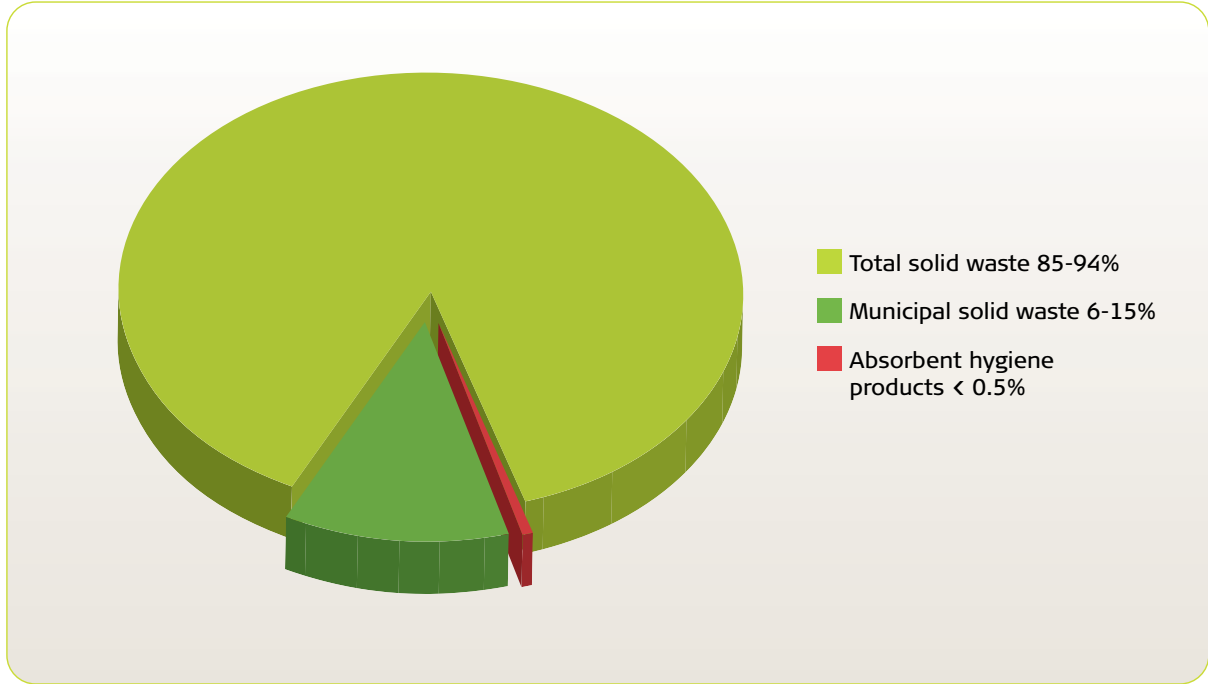
Absorbent hygiene products are safe and compatible with prevailing waste disposal and treatment methods:

- they are readily compressed and contained in landfills;
- they can be incinerated in properly functioning incinerators;
- they can be composted provided there is appropriate technology available to separate the biodegradable, cellulose-based parts from the synthetic pieces;
- they can be processed using Mechanical Biological Treatment (MBT) methods.

// The wood pulp used in absorbent hygiene products represent less than one percent of total wood consumption. //

Along with the company specific initiatives we undertake to reduce our waste, as an industry we also play our part in finding new and innovative solutions to reducing waste in the community. Through our membership of The Association for the Sustainable Use and Recovery of Resources in Europe (ASSURRE), we participated in research to extend our understanding of Mechanical Biological Treatment processes which has confirmed their appropriateness for handling absorbent hygiene product waste.

Graph 04 Absorbent Hygiene Product Waste in the EU



5.4
Environmental and Financial
Policies and Instruments

Edana supports the introduction of measures which will reduce the overall environmental burden and we welcome opportunities to work with local authorities, national governments and the European Union to identify ways to improve the environmental efficiency and effectiveness of our products and activities.

Our experience is that the most successful policies and procedures are developed in partnership with the relevant parties so that all of the implications and consequences can be considered upfront and policies developed accordingly.

The absorbent hygiene products industry believes that measurement criteria for eco-labelling schemes and other environmental communications should be based on life cycle information which will fully inform the customer about the environmental impact of a product through all its stages of production, use and disposal. Measurement criteria must not limit innovation and creativity, and should be adaptable to fast changing technologies, such as those applied to the manufacture of absorbent hygiene products.

We do not support using financial instruments (such as incentives for particular products) as a way of reducing solid waste. Such mechanisms can distort the market while having little to no impact on reducing the overall solid waste stream and simply transferring environmental impact from one area to another.

In the context of the European Union's current review of reduced VAT on some goods and services, the absorbent hygiene industry supports the views of family associations calling for a reduced rate of VAT on baby diapers. We note that an economic study on VAT reduction on diapers in Portugal showed that actual market price reductions equated directly to the tax cuts, providing significant savings to families and demonstrating the benefits of such a change if it were to be generalised across the European Union.

6. The Economic Aspects of Sustainability

// There is considerable growth potential, particularly among the newer member states where market penetration is considerably lower than in the mature markets of Western Europe. //

6.1 The Absorbet Hygiene Product Market

The size of the European market for disposable hygiene products is comparable with the US market. Across Europe however there are significant variations between countries in terms of market penetration. There is considerable growth potential, particularly amongst the newer member states where market penetration is considerably lower than in the mature markets of Western Europe.

In summary:

- in 2006 the annual volume of disposable baby diaper products sold in Europe and Turkey was estimated to be 19.2 billion units with an annual market value of between 4.5 and 5 billion Euros;
- the total figures for the diaper market in Europe and Turkey show annual growth of around 1.2 percent in the number of units sold over the past two years. The fastest growing markets during the past five years were the Czech Republic, Iceland, Romania, Turkey and Ireland which, although currently representing only 9.9 percent of the total market, between them have grown by an annual average of 6.5 percent over the past five years and are forecast to continue to grow in the coming years;
- the total estimated volume of incontinence products sold in Europe in 2006 was around 5 billion units with an estimated revenue value to manufacturers of some 1.5 billion Euros;

- the retail market is becoming an increasingly important outlet for incontinence products growing from 26 percent of the total market in 1997 to 40 percent in 2006;
- the total size of the feminine care market in 2006 in Euro 27 and Turkey was estimated to be 35.5 billion pieces: 42 percent were sanitary pads; 42 percent were pantyliners; and 16 percent were tampons. In 2006 it was estimated that the value of the market for feminine care products was around 3.8 billion Euros. (Graph 05)

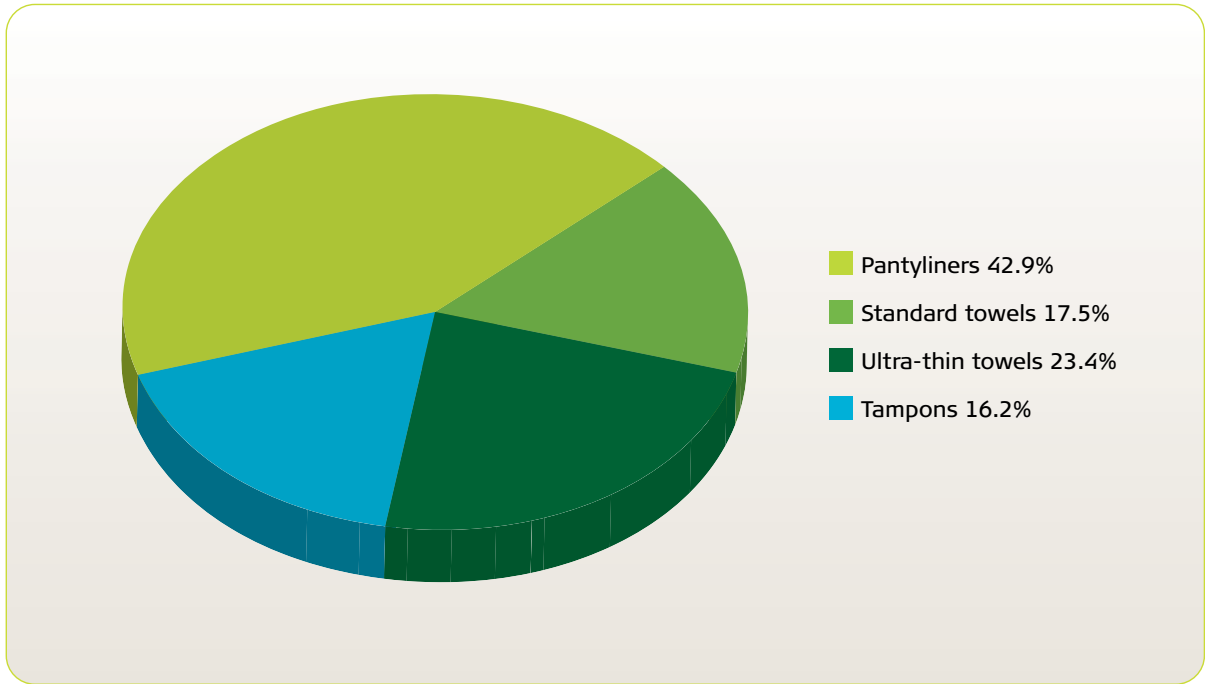
6.2 The Absorbet Hygiene Product Industry

The absorbent hygiene products industry comprises a diverse range of international and national companies, some are dedicated solely to the manufacture of absorbent hygiene products, and others are members of larger manufacturers and distributors of goods. The industry is a combination of manufacturers of branded and private label products:

- In total the members of Edana who manufacture absorbent hygiene products employ some 100,000 people in Europe, making a substantial contribution to the economic wellbeing of families and communities in the countries of Europe;

- In 2006, some 20,000 people were directly employed in the manufacture of absorbent hygiene products in Europe, matched by a similar number upstream within raw materials supplier industries; not to mention those employed downstream in logistics and commercial operations;
- The industry invests widely in its European product development and manufacturing activities. The location of manufacturing facilities in the region is indicated in the inside back cover of this document.

Graph 05 Feminine Care Market Segmentation in the EU 2006



7. Conclusion



Absorbent hygiene products are an important and essential feature of modern day life in Europe. Our industry is dynamic and creative. Through innovation and the application of state-of-the-art technology, we will continue to respond to consumers' needs for safe and high performance products which are continuously improving. In this way the users of our products can be assured of even greater benefits in the hygiene, lifestyle and convenience attributes they have come to expect and on which they rely.

At the same time we will continue to work on reducing the environmental impacts of our products and processes.

We believe we demonstrate a good track record in sustainability activities to date. We are not complacent however. The challenge of improving the sustainability profile of our products is an ongoing one. By addressing all aspects of sustainability; social, environmental and economic we are committed to improvement, while at the same time continuing to offer products that will make a real contribution to improving people's lives.

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Acknowledgements: The authors would like to acknowledge additional contributions from the following people:

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Edana	Pierre Wiertz
IKW (Industrieverband Körperpflege -und Waschmittel)	Jens Burfeindt
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Alligence Communication Architects

Published by Edana

International Association Serving the Nonwovens and Related Industries

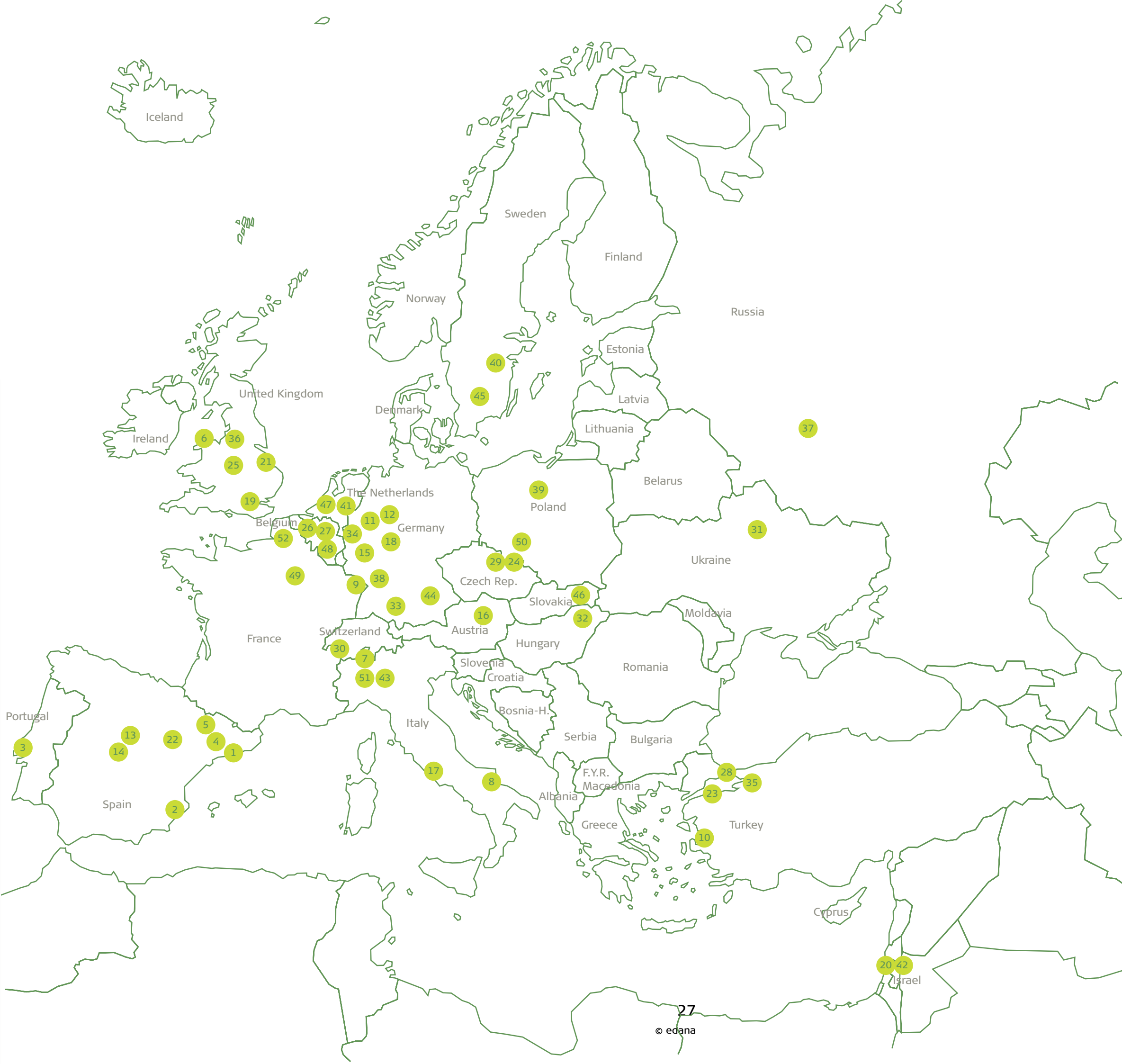
About the publisher:

Edana, as the leading association and voice of the nonwovens and related industries, is Europe-based, has a global outlook and aspires to provide leadership to create an environment beneficial to innovation and sustainable and profitable growth of the industry participants through dialogue with stakeholders and the active promotion of sustainable development, consumer/end-user interests and transparency.

It represents, protects and actively promotes the common interests of the nonwovens and absorbent hygiene product industries and their suppliers and provides the umbrella under which industry-wide initiatives of a non-competitive nature can be undertaken.

Published in 2007

Printed on FSC Paper



Key

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1 Barcelona (HQ)
2 Jijona
3 Lisbon
4 Mequinenza
5 Montornés

- 
26 Zele (HQ)
27 Eeklo
28 Istanbul
29 Turnov

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6 Flintshire

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30 Geneva (HQ)
31 Borispol
32 Budapest
33 Crailsheim
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35 Gebze
36 Manchester
37 Novomoskovsk
38 Schwalbach
39 Targowek

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8 Pescara

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9 Kunheim

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10 Yeniköy - Izmit

- 
40 Aneby

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11 Mulheim / Ruhr

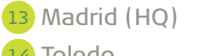
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41 Nijmegen

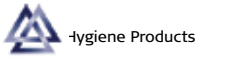
- 
12 Mulheim / Ruhr

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42 Israel

- 
13 Madrid (HQ)
14 Toledo

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43 Milano

- 
15 Dusseldorf (HQ)
16 Hallein
17 Pomezia
18 Wuppertal

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44 Munich (HQ)
45 Falkenberg
46 Gemerska Horka
47 Gennep
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49 Linselles
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19 Reigate (HQ)
20 Afula
21 Barton
22 Calatayud
23 Istanbul
24 Jaromer

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51 Trescore Tremasco

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25 Birmingham

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52 Wasquehal

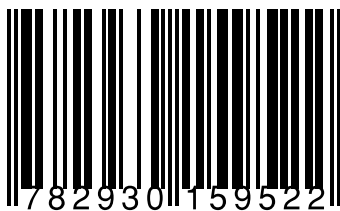


Published by Edana
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the Nonwovens and Related Industries
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D/2007/5705/5

ISBN 2-930159-52-9



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