

# Substitution of Chemical Substances of Potential Concern

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Workshop “Problematische Chemikalien ersetzen“

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## Presentation outline

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- What are we doing about Substitution?
- What are the POD and the EEN?
- How do we promote the POD?
- Market segmentation results
- Matchmaking events

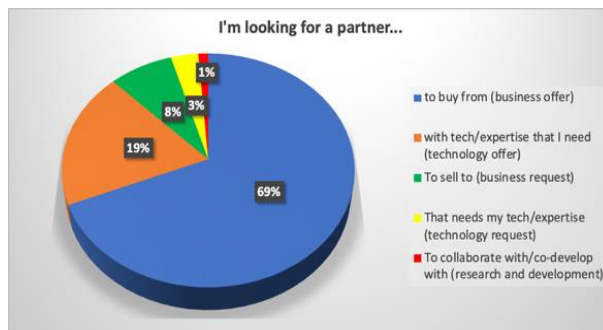
## What are we doing about Substitution?

### EASME project “Substitution of Chemical Substances of Potential Concern”

#### Objectives:

- Promote the Partnership Opportunity Database (POD - <https://een.ec.europa.eu/partners>) maintained by the Enterprise Europe Network (EEN - <https://een.ec.europa.eu>) as platform of choice for advertising alternative solutions to the use of chemicals of concern; in order to:
- Support SMEs searching for or offering safer alternatives

## What is the POD?



**Around 5,600 opportunities at 28 January 2020**

The Network is active in more than **60 countries** worldwide. It brings together **3,000 experts** from more than **600 member organisations**

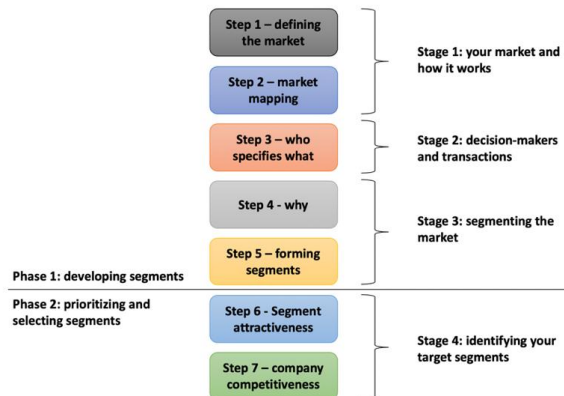
## How do we promote the POD?

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- Market segmentation
- Matchmaking events

## Market Segmentation

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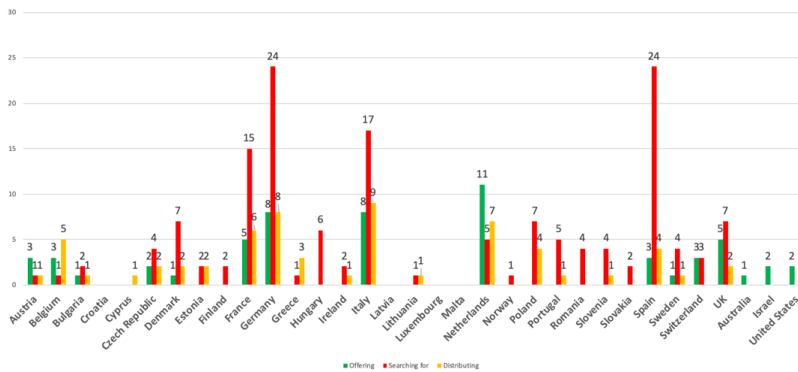


## Market Segmentation results

A total of 272 responses have been received:

- 151 companies completed the questionnaire for organisations **searching for** safer alternatives;
- 59 companies completed the questionnaire for organisations **offering** safer alternatives;
- 62 companies completed the questionnaire for organisations **distributing** alternative solutions to the use of chemical substances of concern.

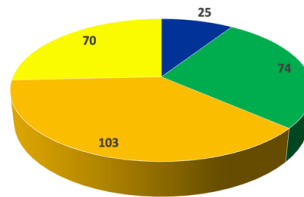
## Market Segmentation results



## Market Segmentation results

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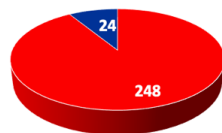
- Large (≥ 250 staff headcount, > € 50 million turnover)
- Medium (<250 staff headcount, ≤ € 50 million turnover)
- Small (<50 staff headcount, ≤ € 10 million turnover)
- Micro (<10 staff headcount, ≤ € 2 million turnover)



## Market Segmentation results

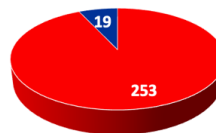
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Did you ever use the Enterprise Europe Network services?



■ No ■ Yes

Are you aware of the Partnership Opportunities Database?



■ No ■ Yes

Over 90% of the surveyed companies never used the services offered by the Enterprise Europe Network and even more (93%) are not aware of the Partnership Opportunities Database

## Market Segmentation results

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### Demand of safer alternatives

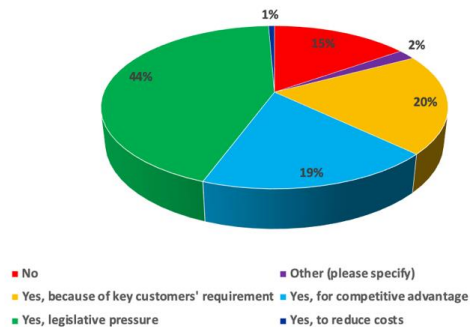
Economic activities of the respondents:

- AGRICULTURE, FORESTRY AND FISHING 1.3%
- MANUFACTURING 82.8%
  - Manufacture of chemicals and chemical products
  - Treatment and coating of metals; machining
- WATER SUPPLY; SEWERAGE, WASTE MANAGEMENT AND REMEDIATION ACTIVITIES 4%
- WHOLESALE AND RETAIL TRADE 7.9%
- PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES. 1.3%
- HUMAN HEALTH AND SOCIAL WORK ACTIVITIES 0.7%

## Market Segmentation results

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### Demand of safer alternatives - Reason to consider substitution



## Market Segmentation results

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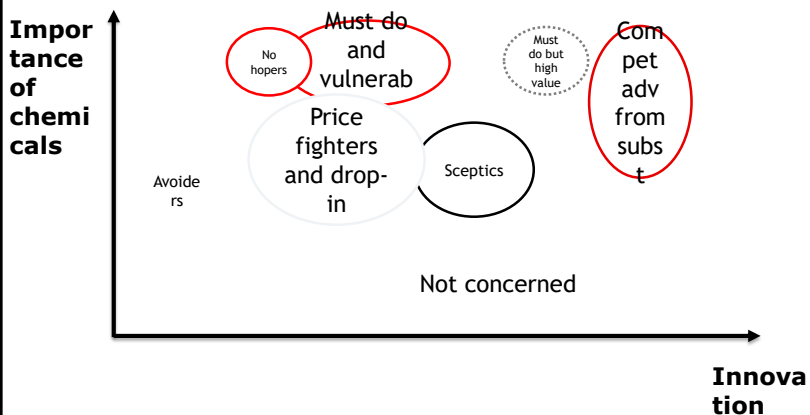
### Demand of safer alternatives - Segments

1. Must do and vulnerable - regulatory or key client pressure on substance
2. Must do but high-value
3. Competitive advantage from substitution
4. Sceptics
5. Price-fighters and drop-in
6. Avoiders in simple supply chains
7. No hoppers
8. Not concerned

Companies' needs change depending on the role that chemical substances play in their businesses. Companies' attitudes towards substitution depend on their knowledge, innovation rate and past experiences.

## Market Segmentation results

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## Market Segmentation results

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### 1. Must do and vulnerable - regulatory or key client pressure on substance - 20% of respondents

- Tend to be micro- and small enterprises
- Regulatory or key client pressure to substitute
- Do not receive any financial support from their key customers
- Not actively investigating substitutes

#### Decisive Buying Criteria:

- Number of alternative solutions available;
- Ease of searching for chemical substances / technical functions / Use sectors / end uses;
- Availability of drop-in substitutes;
- Number of prospective partners able to help with R&D of alternatives;
- Availability of funding opportunities.

## Market Segmentation results

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Comparative assessment: the POD vs chemsec Marketplace		
CSF	POD	Marketplace
1. Number of alternative solutions available	2	6
2. Ease of searching for chemical substances / technical functions / Use sectors / end uses	3	8
3. Availability of drop-in substitutes	0	8
4. Number of prospective partners able to help with R&D of alternatives	5	0
5. Availability of funding opportunities	1	0
6. Availability of non-chemical alternative providers	5	3
7. Availability of service providers	3	0
8. Availability of profiles of agents and chemical distributors	3	0
9. Availability of profiles of physical delivery system providers	4	0
10. Availability of technology and business demand profiles from public procurement bodies	0	0
11. Availability of technology and business demand profiles from large companies	0	0



## EEN Matchmaking Events

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- 9 October 2019 - Eindhoven (NL) - B2B Matchmaking in the value chains of Medicinal & Aromatic Plants - MAP EXPO 2019 (**92 participants - 5 meetings**)
- **COSMETICS**: 14 October 2019 - Brussels (BE) - International matchmaking event on bio, eco, natural and sustainable products at BioXpo (**133 participants - 4 meetings**)
- **CIRCULAR ECONOMY**: 17-18 October 2019 - Dusseldorf (Germany) - International Brokerage Event during K2019 - Leading trade fair for plastics and rubber (**85 participants - 8 meetings**)
- **BIO-ECONOMY**: 18 November 2019 - Graz (Austria) - ESIB 2019 - Science meets Economy (**92 participants - 6 meetings**)
- 20 November 2019 - Brussels (Belgium) - International matchmaking event on sustainable development goals "G-STIC 2019" (**125 participants - 2 meetings**)
- 28 November 2019 - Palma de Mallorca - Innovations to reach a Circular Tourism Destination: Brokerage Event (**25 participants - 2 meetings**)
- **BIOCIDES**: 11 December 2019 - 's-Hertogenbosch (NL) - AgriFoodTech b2b Meet&Match 2019 (**105 participants - 7 meetings - 1 company attended**)

## Dissemination Events

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The dissemination events:

- 26-27 September 2019 - Kaunas (Lithuania) - 9<sup>th</sup> International Scientific Conference "Rural Development 2019" on Research and Innovation for Bio-Economy (**audience of 200 participants**)
- 3-4 December 2019 - Vienna - Chemical Watch Conference "Biocides Europe 2019" (**audience of 230 participants**)

## **Matchmaking Events**

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Business matchmaking is a way for businesses to meet with new and promising cooperation partners in short face-to-face talks. Meetings can be pre-arranged prior to the event by consulting the participant list and checking the profiles and interests of the participants.

### **WKÖ Workshop “Replacing problematic substances”**

30-31 January 2020 - Vienna

#### **Final event**

- 6 March 2020 - Brussels - B2Match website

<https://substitution-of-chemicals-of-concern.b2match.io/home>

**Thank you**

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