

2023

Annual Report



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Foreword



CHRISTOPHER METZ PRESIDENT

Reflecting on the past year, the diisocyanates industry has shown remarkable resilience amidst a variety of challenges, including geopolitical tensions and increasing energy costs. Yet, our industry has maintained a strong commitment to responsible practices and sustainability. The year 2023 has highlighted our capacity to quickly adapt and continue delivering value in a changing environment.

At ISOPA, this has been a year of remarkable achievements on our journey towards a more safe and sustainable industry. A defining moment for us was our Strategy Meeting with the Board of Directors, where we laid down a firm roadmap for our future. We have made notable progress, particularly in enhancing our training programs and driving forward our sustainability efforts. These steps are not just about addressing today's needs but ensuring the resilience and continuous improvement of our industry for years to come.



JÖRG PALMERSHEIM SECRETARY GENERAL

2023 proved to be an exceptionally active year for the ISOPA office. The main reason was the implementation of the REACH restriction on diisocyanates in August. Our staff had to focus intensely to develop our training offer and to ensure that workers could complete their training in time.

I am also pleased with the progress that we made on the advocacy side with regards to the Occupational Exposure Limit values for diisocyanates. Constructive dialogues have been held with policy-makers. We can expect the law to be published in early 2024, before the European elections.

Finally, our working groups kept on delivering on our main priorities: product stewardship, sustainability, combustibility and chemical legislations. I am grateful for the collective efforts of our members and stakeholders, which continue to drive our industry forward.

REACH Restriction

A successful digital training platform

The REACH Restriction on diisocyanates has taken effect in August 2023 and requires that every worker using the substance completes a training.

The website www.safeusediisocyanates.eu has emerged as the key resource for European workers seeking comprehensive training on the safe handling of diisocyanates. With over 650,000 registered users at the end of 2023, this milestone reflects industry-wide commitment to safety and compliance.

The high registration figures also serve as a testament to the quality of the training offered. Since June, the platform is available in 26 languages and features training materials created by a team of over 100 experts from our member companies and downstream users' associations.

A growing network of trainers

In parallel to online courses, ISOPA is working hard to help the value chain organize training on sites. To do so, ISOPA provides access to the training materials to safety and EHS experts.

These trainers can then organize trainings in-house or to other companies. By the end of 2023, more than 150 trainers were offering sessions in all 27 Member States.



REACH Restriction

Train-the-Trainer Courses

To increase the number of trainers in the EU, ISOPA has launched Train-The-Trainer courses. The objective of these courses is to train experts to give trainings related to the REACH Restriction on Diisocyanates. To guarantee excellence in these courses, Jörg Palmersheim has been certified as a TÜV Trainer. The sessions are held online and in-person, and are available in English, German and French.

New License Agreements

ISOPA continues to engage with multinational companies interested in integrating our training materials into their own Learning Management System. Many agreements were signed in 2023 and we are pleased to see that such companies value the quality of our materials.

New Partnerships

ISOPA and secova, one of the leading software companies in the field of Environmental, Health and Safety in Germany, have agreed on a long-term cooperation. We are proud to say that all training modules developed under our leadership are now also available via secova's EHS software solution sam®. Furthermore, ISOPA and TÜV Rheinland, a leading provider of technical inspection and certification services, began a collaboration. TÜV Rheinland now has access to all the training material, which is offered through their platform www.mycompetence.de.



Training Platform in Numbers in 2023

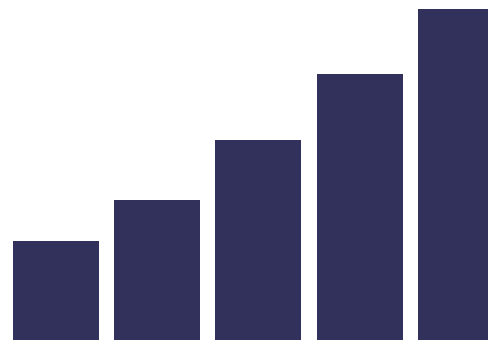
638.315 — Online registrations

Number of trainers — **150**

36 — Number of training courses

Number of languages — **26**

27 — Licence agreements signed



Occupational Exposure Limit Value for Diisocyanates

In February 2023, the Commission has published its proposal for an Occupation Exposure Limit value (OEL) for diisocyanates. The Commission proposes an OEL of $6\mu\text{g NCO}/\text{m}^3$ and a short-term exposure limit of $12\mu\text{g NCO}/\text{m}^3$. Importantly, a transitional value of $10\mu\text{g NCO}/\text{m}^3$ with an associated short-term exposure limit equal to $20\mu\text{g NCO}/\text{m}^3$ should apply until 31 December 2028. The values reflect the ones that were previously agreed by the Advisory Committee on Safety and Health at Work.

Following the Ordinary Legislative Procedure, the proposal moved to the European Parliament and the Council. In June, the Council published its General Approach. They agreed to the values and also rectified the omission of 'NCO' in the text where the measurement of diisocyanates is mentioned. In September, the Employment and Social Affairs Committee of the Parliament adopted the draft report with the agreed values and called the Commission to launch "a revision process no later than 31 December 2029".



In November, the three institutions came to an agreement during a trilogue meeting. Importantly, the values and the transition period were agreed by everyone. The amendment about a revision of the values was modified and the text now mentions in the recitals that the Commission may review the values in 2029.

The Parliament and the Council now have to formally adopt the agreement before its publication in the Official Journal of the EU, which is expected in the first quarter of 2024. Member States will then have two years to implement the values into their own national laws.

ISOPA has engaged with all decision-makers involved in the process to ensure the best possible outcome for the industry. We believe that the agreed OEL values, in combination with the existing REACH Restriction's mandatory training for workers, will ensure a framework which fully protects workers.

Cohort Study

In 2023, the main cohort study was kicked off under the leadership of the Research Institute for Prevention and Occupational Medicine of the German Social Accident Insurance Institute of the Ruhr University Bochum (IPA Bochum). This study, focusing on the effects of diisocyanate exposure, involves 21 companies and 25 sites. It aims to track health outcomes and exposure levels among workers, enhancing safety practices.

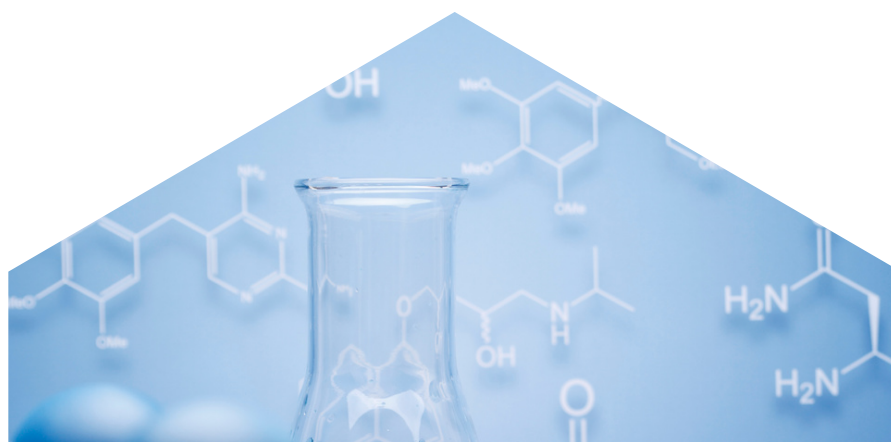
Key activities this year included enrolling 241 employees in a structured review process, pairing intervention with control groups for comprehensive data collection. A standout moment was an interactive Q&A session between ISOPA experts and IPA Bochum, enhancing our understanding and approach to occupational health in the diisocyanate sector.

Chemical Regulation Cluster

The Chemical Regulation Cluster (CRC) has been actively discussing current legislative actions and proposals in its biannual meetings and intermediate calls. The discussions primarily focused on key elements of the Chemical Strategy for Sustainability (CSS), notably the 'Generic Risk Assessment' (GRA), 'Mixture Assessment Factor' (MAF), and 'Essential Use Concept' (EUC), which are particularly crucial for ISOPA. The CRC also explored the registration of polymers and their impact on our industry, leading to the formation of a subgroup comprising internal experts from our member companies and from ALIPA to dive into this matter.

The meetings addressed the broader implications of upcoming EU environmental regulations, such as the Industrial Emissions Directive and various restrictions (e.g., on microplastics and PFAS), on member companies and the wider European chemical industry. ISOPA members and experts are contributing to the support of industry associations like Cefic in their advocacy efforts. Additionally, the work of partner associations such as Europur, Euromoulders, PU Europe, and III is being closely monitored and supported as needed.

The CRC is also monitoring the policy developments in other regions of the world. The development of Occupational Exposure Limit (OEL) regulations and restrictions on isocyanates in non-EU countries received particular attention.



Product Stewardship Cluster

The Product Stewardship Cluster has met multiple times in 2023 to ensure coherence among the different training programmes offered by ISOPA. It was notably decided that the "Walk-the-Talk" initiative will be smoothly transitioning to the digital training platform www.safeusediisocyanates.eu, which will become the main product stewardship resource hub from ISOPA.

Furthermore, the Cluster has worked on maintaining the most current and critical documentation, including safety data sheets, accessible in the dedicated section of ISOPA website. This ensures that our stakeholders are always equipped with the latest information to uphold the highest safety standards.

Logistics Working Group

In the past year, the Logistics Working Group has continued its commitment to safety and environmental stewardship within the polyurethane industry.

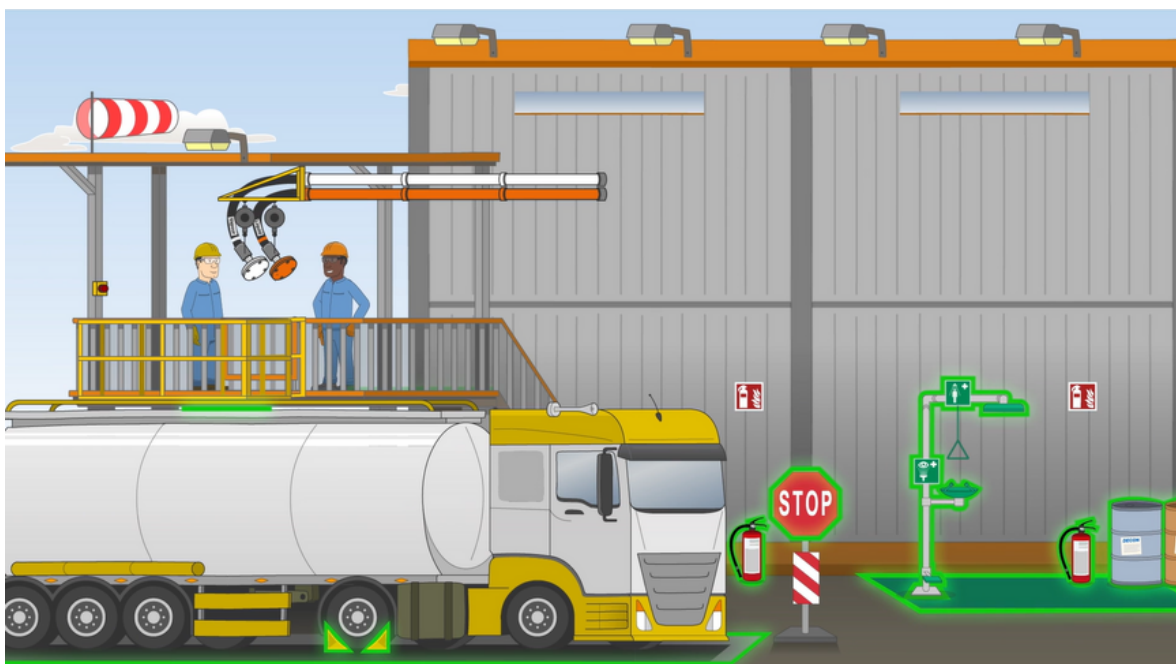
In particular, multiple train-the-trainer sessions were organized by our Member Companies to guarantee the safe transport of diisocyanates.



Product Stewardship Cluster

Logistics Working Group

In 2023, ISOPA has taken a significant step forward in enhancing the training resources available to logistics personnel. We launched a new educational video focusing on the safe unloading of MDI. This video serves as a comprehensive guide for drivers, detailing the proper procedures and precautions for handling MDI safely. It has been integrated into the slideshow utilized by trainers during the ISOPA driver training sessions, ensuring that this critical information is effectively communicated to those on the front lines of our industry's logistics operations. The video is also accessible on our website. Following the success of the MDI safety video, ISOPA is in the process of developing a similar educational tool for the safe unloading of TDI.



Product Stewardship Cluster

One Step Ahead

A highlight of 2023 was ISOPA's participation at the UTECH Middle East Foam, Adhesives & Polyurethane Expo 2023 in September in Dubai. Visitors of the ISOPA booth were informed on the One Step Ahead (OSA) activities. In October, the ISOPA team joined the PUTECH Eurasia conference in Istanbul, Turkey, where Jörg Palmersheim announced the availability of the general training in Turkish.

An important strategic decision has been made in 2023 by the working group. It has been decided to transfer the Walk-the-Talk versions for countries outside the EU, like Turkey, China or India to the OSA initiative, as this seems a logic option to ensure proper up-to-date safety training in regions/countries outside Europe. Over time, it is expected to include the training in these languages on the digital training platform www.safeusediisocyanates.eu and to progressively phase out the OSA logo from the training material.

Next to the online training material and despite the fact that no F2F seminars were organized in 2023, the F2F OSA events are still considered essential as they have proven their importance over the past years. The OSA WG targets to restart the F2F seminars from 2024 onwards. The 'train the trainer' concept, that was used in the past, mainly training of distributors, will also be considered again in 2024.



Sustainability Cluster

Mass-Balance

An important topic being discussed at the EU level regarding sustainability is the mass-balance approach. In 2023, ISOPA has co-signed a letter with other associations to advocate for this approach. The letter addresses the policy framework needed to deliver recycled content in key plastics applications. In particular, manufacturers, converters and users of plastic products and plastics packaging call on the European Commission and Member States to adopt EU harmonised calculating rules for recycled content, by means of mass balance.

Ecodesign for Sustainable Products Regulation

Another sustainability topic that was highly discussed by EU policymakers in 2023 was the Ecodesign for Sustainable Products Regulation (ESPR). Together with 24 organisations, ISOPA has co-signed a letter to the ENVI committee of the European Parliament calling to ensure that ESPR requirements for substances of concern focus on achieving circular economy and apply only to substances that impede recyclability and reusability.



Eco-Profiles

Finally, in December, an important achievement made by the sustainability cluster was the collaboration between ISOPA and ecoinvent, a leader in life cycle inventory data. The objective of this partnership was to integrate updated data on polyols and diisocyanates production into ecoinvent version 3.10. This topic will be further discussed by the Cluster in 2024 to ensure coherence and clarity among member companies and their customers.

Combustibility Cluster

The Combustibility Cluster continued its work focusing on several key areas to advance fire safety in polyurethane applications. A notable effort was the response to the proposal for reclassification of TCPP, a flame retardant, to a higher carcinogen class. This prompted a significant industry collaboration, including ISOPA, PU Europe, and others, to develop a unified stance for negotiations with regulatory bodies, addressing not only carcinogenicity but also reproductive toxicity and endocrine disruption concerns.

Additionally, the cluster engaged in strategic partnerships through the Modern Building Alliance to influence fire safety policies and standards. Despite shifts in membership, the alliance has made substantial progress, positioning itself as a critical stakeholder in fire safety discussions at both European and national levels.

Another focal point was the advancement of smoke toxicity standards, with the cluster supporting efforts to progress ISO 13571 to a New Work Item stage. This move towards standardization, coupled with initiatives to assess the environmental impact of fire effluents, underscores ISOPA's commitment to comprehensive fire safety and environmental protection.

Communications

In the past year, ISOPA's communications efforts have seen remarkable achievements across various platforms. The revamped version of the ISOPA website was a success, with an impressive increase in traffic. The website www.polyurethanes.org also continued to draw a high number of visitors, averaging around 5,000 views per month, further solidifying our position as a key information hub for the industry, especially on the topic of sustainability. Our presence on social media, especially on LinkedIn, has doubled, reflecting our growing influence and engagement within the industry.

Our statements and press releases were echoed in the most important media for our industry such as PU Magazine, Urethanes Technology, and European Coatings Journal. Moreover, ISOPA has been active in various events, notably showcasing our digital training platform. This initiative has significantly contributed to our mission of promoting best practices and innovation within the polyurethanes industry.

Our regular newsletters, now featuring a new design, have kept our members and stakeholders informed about the latest activities and developments within ISOPA. Similarly, the publication of policy briefs has provided valuable insights into the regulatory landscape in Brussels.

Brussels Policy Brief from the ISOPA Perspective

ISOPA
July 2023

Sustainability

ESPR Update: The Commission has introduced on 30th March 2022 a proposal for an Ecodesign for Sustainable Products Regulation (ESPR). Since then, the ENVI Committee of the European Parliament adopted its [report](#) on the 15th of June.

ISOPA Action: Together with 24 organisations, ISOPA has co-signed a letter to the ENVI committee calling to ensure that ESPR requirements for substances of concern focus on achieving circular economy and apply only to substances that impede recyclability and reusability. You can read the full letter [here](#).

Mass-Balance: ISOPA has co-signed a letter on the policy framework needed to deliver recycled content in key plastics applications. In this letter, signatories call on the Commission and Member States to adopt EU harmonised calculating rules for recycled content, by means of mass balance. You can read the full letter [here](#).

Heard in the Brussels Bubble

IED: The ENVI Committee [has voted](#) on the Industrial Emissions Directive (IED) (rapporteur, Radan Kanev, EPP, BG) and the report was adopted with 55 votes in favor, 26 votes against and 6 abstentions. You can find the report and amendments [here](#). The next step in the process is the plenary vote, expected for July 2023.

Microplastics: Chemical Watch [reported](#) that the EU is one step closer to implementing a restriction on intentionally added microplastics under the REACH regulation. The proposal is expected to be adopted by the end of the year.

Spanish Presidency: ENDS reported that the Spanish government has expressed its intention to expedite progress on various environmental priorities, including the Fit for 55 files, waste and microplastics, sustainable product rules, and green fuels.

Fit for 55: The Council [adopted](#) pieces of legislation of the 'Fit for 55' package including the Revision of the Emissions Trading System (ETS) Directive and the Regulation establishing a Carbon Border Adjustment Mechanism (CBAM).

Plastic Treaty: Council of EU [publishes](#) note on information from Presidency and Commission on second session of Intergovernmental Negotiating Committee to develop international legally binding instrument on plastic pollution. News reports can be read [here](#): Politico, Euractiv, and El País.

ISOPA on Stage



CPI Conference organized by the American Chemistry Council in San Antonio, Texas.



Putech Eurasia, Istanbul, Turkey



UTECH Middle East Foam & Polyurethane Expo, Dubai



ICCM5, Bonn, Germany

ISOPA on Stage



PDA Annual Conference,
Barcelona, Spain



EUROPUR Flexible Polyurethane Foam
Conference, Budapest, Hungary



Diisocyanates Safety Training,
Luxembourg



Global Meeting of Diisocyanates
Associations, Japan

Global PU Associations Meeting

2023 marked an important milestone: the first in-person Global PU Association Working Group Meeting since the pandemic. The event was held on November 15-16, 2023, in Yokohama, Japan. This was the chance of reconnecting leaders and experts from around the globe after years of virtual communication.

The agenda featured presentations from member countries, discussions on global issues like PFAS and fire safety, and collaborative sessions on future activities and partnerships. Participants from China, South Korea, Japan, the United States, Thailand, Europe, and India showcased the diverse and global nature of our industry.

This year's meeting was not just a reunion; it was a reaffirmation of our collective commitment to advancing the polyurethane industry, addressing global challenges, and fostering international cooperation. We look forward to building on the success of this meeting and continuing our important work together.



Team News

Leadership Team Re-Elected

ISOPA is pleased to announce the re-election of its leadership team during the General Assembly meeting that took place in Landgraaf (NL) in June. Christopher Metz, Vice-President of Business Management Isocyanates at BASF, has been re-elected as President of ISOPA. Erik Vangronsveld, Global Materials & Industry Sustainability Director at Huntsman, has been confirmed as Vice-President. Jörg Palmersheim will continue to serve as Secretary General for ISOPA.

This decision reflects the members' confidence in the leadership team's exceptional expertise and experience, ensuring that ISOPA is well-equipped to work on the organization's strategy and vision.

Their re-election paves the way for continued success in deploying ISOPA's digital training platform on the safe use of diisocyanates and advancing the industry's pathway towards sustainability.

Saying farewell to Karolina... and welcoming Iva!

Our dear colleague Karolina Rybka has embarked on a new and exciting journey in Denmark. Karolina has been an invaluable part of our team, supporting our office and contributing her expertise to our training platform. Her dedication and hard work have been truly appreciated, and she will be dearly missed.

As we bid farewell to Karolina, we also extend a warm and enthusiastic welcome to her successor, Iva Jurat. Iva has taken on the role of supporting the management of the training platform since October, and we are thrilled to have her on board.

Jörg Palmersheim celebrates 10 years at the helm of ISOPA

The ISOPA Team is pleased to celebrate the ten-year anniversary of Jörg Palmersheim as our Secretary General. On this occasion, we would like to thank him for his leadership and for the positive working environment he has created. We look forward to continuing our journey under his guidance and to achieving even greater successes in the years to come.

Our Experts

Here is a list of all our experts and board members (in bold). We extend our gratitude to the experts who have collaborated with ISOPA and who have embarked on new journeys in the course of 2023 (in brackets).

BASF: Christopher Metz, Gitta Egbers, Thomas Merz, Elif Unterberger, Uwe Blumenstein, Steffen Kahrman, Susanne Demharter, Klaus Wittstock, An Dupon.

BorsodChem: Tibor Klement, Hella Tothne, Nora Janosik, Andrea Cappella, Gyulane Szabo, Eniko Darmo, Gabor Szuhai, Mónika Horváth. (Ana Fridel).

Covestro: Christine Mendoza-Frohn, Gudrun Luecke-Brunk, Hans-Georg Pirkl, Lutz Brassat, Tanja Gutschmann, Monika Leutbecher, Thomas Gross, Yvonne Zielezny, Jose Gavira. (Malik Duhaut).

DOW: Rajesh Balan, Petra van Haarlem, Claire Andeso, Paul Cookson, Laura Aguilar. (Christine Lucas).

Huntsman: Erik Vangronsveld, Shpresa Kotaji, Diane Daems, Bart Bossuyt, Liesbeth Melis, Ronald van der Kooij.

Shell: Wouter Mineur, Els van Eetvelde, André van der Swet, Udeogu Onwusogh.

ISOPA Office: Kristine Dewaele, Jörg Palmersheim, Briec Lits, Iva Jurat. (Karolina Rybka).

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