

2025

ANNUAL REPORT

6TH EDITION

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FOREWORD

Reflecting on the past year, the diisocyanates industry has shown resilience despite ongoing challenges, including geopolitical uncertainty and rising energy costs. Throughout this period, the industry has remained committed to promoting safety and sustainability. Polyurethane continues to support sustainability goals, with new applications and advances in recycling technologies improving resource efficiency and supporting the circular economy.

For ISOPA, the past year has also been defined by meaningful progress toward a safer and more sustainable industry. We have expanded our diisocyanates safety training programmes and further advanced our sustainability initiatives and communications. These actions are essential to reinforcing the industry's long-term resilience and supporting sustainable growth in the years ahead.

Christopher Metz

President



Jörg Palmersheim
Secretary General



The past year has been an important one for the ISOPA office. Our work on the diisocyanates programme has led to a steadily expanding network of trainers and safety experts, as well as the achievement of ISO certification and the receipt of two major awards, recognizing the industry's efforts. Our communications activities, aimed at highlighting the role of polyurethane in supporting a sustainable future, have continued to reach a growing audience.

Throughout the year, our working groups have remained focused on delivering key priorities, including product stewardship, an increased emphasis on sustainability, and important chemical legislation. I would like to express my sincere appreciation to our members and stakeholders, whose ongoing commitment continues to drive our industry forward.

REACH RESTRICTION ON DIISOCYANATES

Successful Training Platform

It has been two and a half years since the REACH restriction on diisocyanates came into effect in August 2023, and the road since then has been marked by hard work and incredible achievements for our training programme. Since 2025, over 900.000 workers have registered online via the digital Safe Use Diisocyanates training platform www.safeusediisocyanates.eu, reflecting the industry-wide commitment to safety and compliance. Throughout 2025, ISOPA has also been reviewing the training material and plans to launch the new 2.0 version in 2026 to make the training more accessible and interactive without amending the content.

Global Safety Platform

Our [global diisocyanates safety platform](#) launched in February 2025 with a newly tailored version of our general safety training module to global audiences. The training is now offered in multiple new languages, with more being added on a running basis. English, French, Spanish, Portuguese, Hindi, and Turkish are already available and other languages, such as Arabic, Japanese, and Mandarin are currently under progress. We are actively working together with global partners to translate and disseminate the new training worldwide.

ISO Certification

ISOPA and ALIPA are successfully certified by TÜV Nord Germany under ISO 29993, the international standard for high-quality non-formal learning services. The certification confirms the excellence of our training portfolio, including the e-Learning, Train-the-Trainer programme and webinars. Our commitment ensures transparency, compliance, and credibility across the polyurethane value chain.

+900.000

Online registrants



Train-the-Trainer

It has been over two years since ISOPA initiated the Train-the-Trainer program in July 2023, and it remains a tool used by many to promote worker safety. The objective of these courses is to train professionals to become safety experts on diisocyanates, capable to provide safety trainings themselves related to the diisocyanates REACH Restriction. The sessions were held online in both English and German, training 35 new trainers in 2025. We are happy to say that 250 external and internal trainers now offer sessions throughout the EU.

"I really liked the interactive elements of the quiz polls and the slides were very useful for me. Now onto next steps and delivering sessions myself. The case study I found really helpful and it certainly focuses my mind on what I need to achieve"

Train-the-Trainer participant

License Agreements

34

Total license agreements

ISOPA continues to engage with multinational companies interested in integrating our training materials into their own Learning Management System. Multiple new agreements were signed in 2025, leading to a total of 34 agreements by the end of the year. We are pleased to see that companies value the quality of our materials.

Classroom Training

In March 2025, we successfully trained 185 workers on the safe handling of diisocyanates through a series of full-day training sessions. The training was provided in-person by ISOPA Secretary General and certified TÜV safety trainer Jörg Palmersheim to employees of Creos Luxembourg. Creos operates Luxembourg's electricity and natural gas networks. To ensure Creos' employees have the necessary knowledge to handle diisocyanates safely, specialised safety training was provided focusing on casting compound for cable sleeves based on MDI products.



Safe Use Diisocyanates Wins Two Awards!

We are honoured to say that Safe Use of Diisocyanates has been awarded two awards in 2025, recognising the hard work and dedication of our industry towards safety.

Best Professional Development Offering

2025 Association Success Awards
Association of Association Executives



Above and Beyond Boundaries - Spreading Responsible Care Ethic Across the Chemicals Value and Supply Chain

2025 European Responsible Care Awards
Cefic



Under the leadership of ISOPA and ALIPA, and in close cooperation with experts from our member companies, representatives from key downstream associations in the polyurethane industry, and contributions from external partners, we developed a pioneering digital training platform, without any existing blueprint to follow. Despite an extremely tight timeline, we developed a platform offering a wide variety of training modules in all EU-relevant languages that address the full range of exposure risks associated with handling diisocyanates. These awards therefore belong to everyone who contributed to making this project a true success story!

"This year's Responsible Care Awards carry even more significance, as we celebrate two milestones – 20 years of the European Awards and 40 years of the global Responsible Care programme. These Awards recognise initiatives that advance safety, sustainability, and responsible practices across the chemical industry. Congratulations to all the winners and commendations for their exceptional dedication to innovation, operational excellence, and fostering a culture of responsibility"

Marco Mensink,
Director General of Cefic



Safe Use Diisocyanates in Numbers

Since its launch

+900.000

Online registrations

+24

Different languages

36

Different training courses

250

Internal and external trainers

160

Train-the-Trainer participants

22

Train-the-Trainer sessions

34

License agreements

2

Awards



OCCUPATIONAL EXPOSURE LIMITS FOR DIISOCYANATES

Directive (EU) 2024/869 entered into force on 2 April 2024 and sets binding EU-wide occupational exposure limits (OEL). A limit of 20 µg NCO/m³ as STEL and 10 µg NCO/m³ as TWA will be in place until 2029, after which a limit of 12 µg NCO /m³ as STEL and 6 µg NCO /m³ will go in effect. This means Member States have until April 2026 to ensure that they have brought into force the appropriate national laws to ensure compliance with the Directive.



Establishing uniform limits is a crucial step toward creating a level playing field and ensuring a consistent approach to worker safety across the EU. A harmonised approach across all Member States is essential to enhance safety and regulatory coherence throughout the Union. ISOPA continues to actively monitor the implementation process and provide feedback to national authorities where needed. A range of countries have already indicated their intention to follow the agreed EU limit values, and we expect more to follow in 2026.

?	Austria	?	Germany	?	Netherlands
?	Belgium	?	Greece	?	Norway
?	Bulgaria	?	Hungary	?	Poland
?	Croatia	?	Ireland	?	Portugal
?	Cyprus	?	Italy	?	Romania
?	Czechia	?	Latvia	?	Slovakia
?	Denmark	?	Lithuania	?	Slovenia
?	Estonia	?	Luxembourg	?	Spain
?	Finland	?	Malta	?	Sweden
?	France				



COHORT STUDY

In 2023, a 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). The study investigates exposure to diisocyanates and the occurrence of respiratory diseases, describe the dose-response relationship, and test the effectiveness of REACH training in companies using those substances.

The cohort study includes an embedded cluster randomized intervention study, in which employees are examined and monitored over a period of five years. The cohort study consists of a detailed on-site initial examination in the first year and a final medical examination in the last year of the study; a "reduced program" in terms of telephone interviews (questionnaire survey, without on-site medical examinations) is carried out in the interim years.

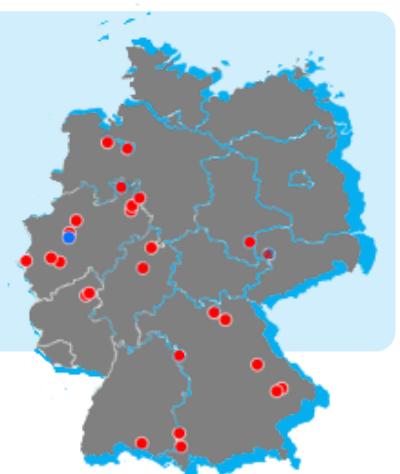
The study includes a total of 512 participants over 32 company locations, of which 14 locations and 228 participants take part in the intervention part of the study. Over 2025, 284 participants were interviewed, and the analysis of the bio-monitoring and air-monitoring was nearly completed.

32

Company locations included

512

Total participants



CHEMICAL REGULATION CLUSTER

The Chemical Regulation Cluster has been actively discussing current legislative actions and proposals. The discussions primarily focused on key elements of the Chemicals Strategy for Sustainability, the Action Plan for the EU Chemicals Industry, and the Clean Industrial Deal, as well as a number of key restrictions and adjacent pieces of legislation.

Diisocyanates Restriction Implementation

In 2025, ECHA [announced](#) a new enforcement project, REF-15, which will assess the risk management measures of various substances, including diisocyanates. This includes checking safety data sheets and verifying whether workplace safety measures are applied correctly. The initiative seeks to strengthen collaboration between REACH enforcement authorities and occupational health and safety bodies. Inspections are expected to begin in 2027, with a final report to be presented in 2028. ISOPA closely monitors the developments and is in contact with the EU institutions.

REACH Revision

The revision would seek to simplify the REACH Regulation and address key issues such as enforcement and regulatory barriers. Important for our industry are the following topics potentially covered: Generic Risk Approach (GRA), Mixture Allocation Factor (MAF), Polymer registration or notification requirements. ISOPA maintains an active monitoring role and provides input into the legislative process via Cefic and our [position paper](#).

Critical Chemicals Alliance

In 2025, ISOPA became a member of the [Critical Chemicals Alliance](#). As a member, ISOPA plans to contribute and represent our industry's position via continued feedback in the Alliance's Working Groups, consultations, and calls for evidence.

Other relevant files

ISOPA also covers a variety of other restriction files in its scope, such as the SPM restriction, the PFAS restriction. A wide range of EU legislative files impact our industry, and ISOPA continues to take on an active monitoring role for many, including the EU Drinking Water Regulation and the CLP Regulation.

ISOPA members and experts are contributing to the support of industry associations like Cefic in their advocacy efforts. Additionally, the work of partner associations is closely monitored and supported as needed. The Cluster is also monitoring the policy developments in other regions of the world, particularly focusing on the development of Occupational Exposure Limit (OEL) regulations and restrictions on isocyanates.

PRODUCT STEWARDSHIP CLUSTER

The Product Stewardship Cluster met multiple times over 2025 to discuss and coordinate the ongoing work of ISOPA's different product stewardship initiatives such as 'Walk the Talk' and 'One Step Ahead' which are now merged under the umbrella of 'Safe Use of Diisocyanates', providing a streamlined approach to promote safety across our industry. At the same time, the Cluster discussed the various ongoing developments around the Safe Use Diisocyanates training platform and chemicals legislation, such as the new EU OEL.

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. In parallel, the working group has updated the ISOPA logistics bulk guidelines on the safe loading and unloading, transportation and storage of TDI and MDI.

New Logistics Guidelines

The new guidelines include key updates regarding the importance of communication between the operator and the driver in line with the European legislation, highlighting the preferred unloading method (pump with vapour return), and new pictures and visuals, as well as links to instructional videos.

OSA Working Group

ISOPA's One Step Ahead (OSA) working group has been promoting the safe use of diisocyanates across Africa and the Middle East. Over 2025, the Working Group has been preparing for a new product stewardship workshop in North Africa planned for 2026, to bring together experts from ISOPA member companies and key industry players to discuss various aspects of Environmental Health and Safety (EHS).

[Read the new Guidelines here](#)



SUSTAINABILITY CLUSTER

Over the past year ISOPA has continued its efforts on sustainability. In particular, ISOPA has worked to promote the Mass Balance approach and chemical recycling as key pathways to a sustainable chemicals industry, whilst highlighting the already ongoing work by our industry to make the green transition a reality, through our communications and advocacy efforts.

Eco Profile update

ISOPA is working to update the Eco Profiles for MDI, TDI and Polyols, last updated in 2021. The Eco-profiles are prepared according to Eco-profiles program and methodology – PlasticsEurope – V3.0 (2019). ISOPA is working together with Sphera, Carbon Minds, and Ecoinvent to complete the update. Significant progress was made in this regard in 2025, with the Eco-Profiles expected to be finalised in 2026.

Sustainability legislation

The ISOPA Sustainability Cluster has actively discussed and contributed to a variety of legislative files in the area of sustainability, circularity, and energy efficiency.

Ecodesign for Sustainable Products Regulation

The ESPR was published in the Official Journal in June 2024. ISOPA is on the reserve list for the Ecodesign Forum and closely monitors the implementation of the Regulation, particularly with regards to PU-relevant product groups such as furniture, mattresses.

The Commission is also expected to launch a study on the inclusion of "chemicals" as a separate product group under the ESPR. ISOPA will take on an active role to represent the industry in this matter.

End of Life Vehicles Regulation

The Regulation sets requirements to ensure new vehicles are designed to facilitate the recycling, re-use and remanufacturing of parts and components, and introduces mandatory recycled content targets for plastics.

ISOPA took on an active monitoring role, following the preparation closely, particularly with regards to recycled content targets and the inclusion of polyurethane. We will now continue to monitor the implementation of the Regulation and its implications for our industry.

Circular Economy Act

The Commission is currently preparing a Circular Economy Act to accelerate the transition to a circular economy, increasing the EU's economic security, resilience, competitiveness and decarbonisation. ISOPA has provided extensive feedback to the Commission's public consultation as well as via a targeted stakeholder survey, as part of the Circular Plastics Alliance. ISOPA continues its engagement on this file, with the Commission's proposal expected to be published in Q4 2026.

Mass Balance Accounting & Recycling

Mass Balance and chemical recycling acceptance have become key topics in EU legislation. These are being addressed in files such as the Single Use Plastics Directive Implementing Act to establish the rules for calculating, verifying and reporting on recycled plastic content. ISOPA actively monitors these files and supports the acceptance of the Mass Balance Approach and chemical recycling as a viable method alongside mechanical recycling.

Other relevant files

Many sustainability files affect our industry, and ISOPA maintains a monitoring role on a number of them, including the implementation of the Packaging and Packaging Waste Regulation, the preparation of the CBAM vertical extension, and the ongoing negotiations on the UN Global Plastics Treaty.



COMMUNICATIONS

In the past year, we have continued our communications efforts across various platforms, providing updates on ISOPA's activities and promoting safety, sustainability and innovation in the polyurethanes industry. We updated and increased our social media presence, particularly on **LinkedIn**, with frequent posts and new designs, seeing good growth in our following.

Alongside our LinkedIn, we have launched a new Instagram page: **[_Polyurethanes](#)**, where we highlight the many different uses of polyurethane and the continuous innovation we see in our industry.

With various new articles published on the website **[www.polyurethanes.org](#)**, it continued to draw a high number of visitors, averaging around 2800 views per month, further solidifying our position as a key information hub for the industry, especially on the topic of sustainability.

In addition, our regular newsletters have kept our members and stakeholders informed about the latest activities and developments within ISOPA and the diisocyanates safety training platform. Similarly, the publication of policy briefs has provided valuable insights into the regulatory landscape in Brussels. Our statements and press releases were echoed in various media channels.

ISOPA has been active in various events, showcasing our digital training platform to promote best practices and innovation within the polyurethanes industry. In this regard, ISOPA has also worked to promote diisocyanates safety training in EU Member States, particularly aiming to reach SMEs. We have done so via national SuD outreach campaigns, including social media posts and an informative safety training flyer.

+3000

Total LinkedIn followers

+70

LinkedIn posts in 2025

2800

Monthly visits on [polyurethanes.org](#)

+20

News articles published in 2025

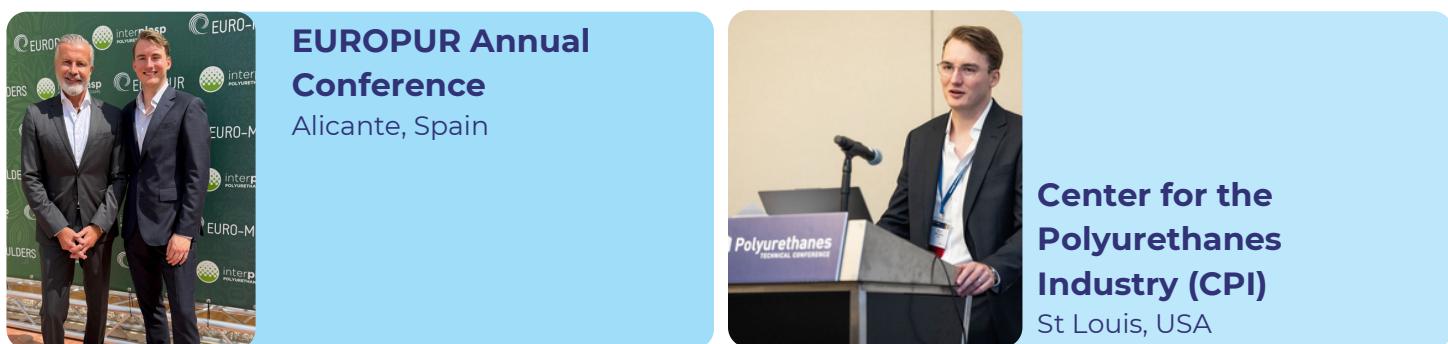
16

Articles in 2025 on [polyurethanes.org](#)

ISOPA ON STAGE



PU TECH 2025
New Delhi, India



ISOPA presented at events across the world to talk about safety, sustainability, and regulation

+7
Presentations

+10
Events



Technical Polyurethanes Congress
Istanbul, Türkiye



Association Success Awards
Hamburg, Germany

ISOPA RE-ELECTED ITS LEADERSHIP TEAM

During our General Assembly in June 2025, ISOPA's leadership team was re-elected. 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 re-elected as Vice-President. Jörg Palmersheim will continue to serve as Secretary General. All have been mandated until June 2027, reflecting members' strong confidence in their leadership and strategic direction.

Under their continued stewardship, ISOPA will pursue its key priorities, with safety and sustainability at the heart of our mission. ISOPA will continue to work closely with policymakers and stakeholders at both European and national levels to contribute to key legislative developments and advocate for the industry's continued path toward greater sustainability. Moreover, safety remains a top priority and ISOPA will maintain the active work on our digital training platform for the safe use of diisocyanates.



Christopher Metz



Erik Vangronsveld



Jörg Palmersheim

Our current Board of Directors

President: Christopher Metz

Vice-President: Erik Vangronsveld

Directors: Rajesh Balan (Dow), Tibor Klement (BorsodChem), Christine Mendoza-Frohn (Covestro), Michael Downes (Shell)

THANK YOU TO OUR MEMBERS AND TEAM

As we conclude this year's annual report, we want to take a moment to express our gratitude to our member companies' experts and our Board of Directors that have made our work possible. Your dedication, knowledge, and commitment have been instrumental in advancing our mission and making a meaningful impact.

Through your expertise, guidance, and hard work, we have achieved significant milestones and delivered on key priorities in pursuit of a safer, more sustainable industry.

Thank you for your invaluable support and for being an integral part of our success. We look forward to another year of collaboration and excellence.



EUROPEAN DIISOCYANATE & POLYOL ISOPA PRODUCERS ASSOCIATION



Rue Belliard 65
1040 Brussels



main@isopa.org



www.isopa.org



www.polyurethanes.org



www.safeusediisocyanates.eu



We create chemistry

