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The European Water Label is an Industry wide supported voluntary labelling scheme for water using products. The Scheme's primary role is to educate the consumer on water use and provide sufficient information enabling an informed choice to be made at point of sale.

This 5th road map (2^{nd} edition) together with Annexe documents, acknowledges the progress made, highlights the milestones achieved, and sets out the aspirations for future expansion. The paper outlines necessary actions required by all Stakeholders in the Schemes quest for greater visibility of the label in the market place.

OVERVIEW

The European Water Label, a voluntary industry led Scheme, has evolved over 10 years across the European Bathroom Industry. The Scheme is open to all companies selling water using bathroom products into the European market. Now fully adopted by 3 major European Associations representing the bathroom sector, with additional support being received from 10 National trade bodies who ensure the requirements of the valve and ceramic sanitaryware Industries are fully embraced by the Scheme.

The European Water Label is the only European Labelling Scheme that embraces all water using bathroom products which has been developed by the broader Industry for use by the Industry to inform consumers.

Currently supported by 120 major brands (5 additional brands joined the Scheme between October and December 2016). The Scheme has expanded into Central European countries such as Romania, Poland, Estonia and Hungary. This progress sees greater support for the developing Scheme, and a higher presence of the label to a broader base of consumers.

Consumers, architects and specifiers can easily identify water flow and volume from an expanding database, that sees over 9,750 live products currently available in the market. An annual cleansing of the Scheme has seen over 3,000 products removed which are no longer available to consumers. In addition to the brands and products the Scheme is supported by a further 52 champions who disseminate information on the Scheme across the differing market sectors, thus ensuring the continual flow of information into the market place on water use.

Annexe documents depict the strength of the European Water Label and its supporters.

The Industry has a vision that by building on these solid foundations this voluntary initiative can support the European Commission's goals of reducing, waste water, hot water energy and carbon emissions across a wide portfolio of water using bathroom products.

It is recognised that collaboration with water utilities, merchants, distributors, retailers and installers across the European market is pivotal to raising awareness of the Label and equally importantly the broader '*using water wisely*' message.

Positive discussions are taking place with major merchants across EU28 who are now seeking to join the Scheme and advising their suppliers that they must register relevant products on to the Scheme and gain greater traction.

Product alone will not deliver efficiencies, behaviour change, good quality product with no less performance go hand in hand. Individually they cannot succeed, collectively they triumph!

THE SCHEME & GROWTH

During the last decade the European Water Label has emerged as the major labelling scheme across Europe for water using bathroom products. A voluntary Industry led initiative, who actively sought input to the Schemes development from all interested parties, embracing National nuances to ensure it meets the needs of the European consumer. The easy to understand label has evolved from humble beginnings to one that embraces 14 product categories supported by 3 major European Umbrella bodies and 10 National trade bodies. 5 independent test houses provide third party audit support, offering a wide choice to the registered brands whose products are called during the annual 5% audit.

Product registrations cover all water using categories for bathroom products, with products registered and labelled across all 5 label grades. Research has clearly identified that water in the domestic environment is mainly consumed by taps, showers and WC flushing and therefore it is no surprise that the Scheme has high representation of these products.

Annexe documents, provide an overview on current product registrations falling within the tap, shower and WC criteria.

LANDMARKS

During the last decade as the Scheme has gone from a small idea into a flourishing European Water Label Scheme, it is worth noting the key milestones achieved along the journey.

2005	The seed is sown
2006	Discussion commences with manufacturers
2007	Water Efficiency Product Labelling Scheme launched
2009	changed name to Water Label
2009	first 1,000 products registered on the Scheme
2010	Discussion with CEIR and its membership commenced
2012	European Water Label launched
2012	The Water Label Company formed
2012	Major merchants and retailers pledge to support the Scheme
2013	1st visibility of the Label at ISH Exhibition
2013	Discussion with FECS and its membership commenced
2013	First panel discussion between CEIR, FECS, EWL, FEST and EDRA held
2014	A suite of marketing and education material introduced and available direct from the Scheme website for all to use
2014	European Water Label seeing greater visibility in the market place – see appended examples
2015	FECS receive written commitment from its membership
2015	Registered brands reach a milestone of 90+ products
2015	CSTB, French test house joins the Scheme
2015	High visibility of the European Water Label at ISH 2015
2015	Media event held during ISH 2015 to raise awareness of the Scheme. This event was well attended by over 70 people.
2015	Regular meetings with EDRA, FEST, CEIR, FECS and the European Water Label to promote the Scheme and encourage greater participation by retailers and merchants
2015	Over 8,000 product registrations supported by 92 major European bathroom brands
2015	European Water Label stand at UK Exhibitions and Conferences
2016	European Water Label website goes live in Spanish, German and Turkish languages
2016	Three National Agents secured in Spain, Italy and Turkey
2016 - March	European Water Label has presence and visibility at Mostra Convegno in Milan
2016 - April	Ferro joins the European Water Label as the first Central European company
2016 - April	Label has presence at Instalacje 2016, Poland in partnership with Ferro highlighting the importance of the scheme
2016 - May	EU-Nited and European Water Label sign letter of Mutual Co-operation
2016 - July	Presentation to FEST Members promoting the benefit of the Scheme

2016 - July	Globus Germany, major DIY chain joins the Scheme
2016 - Sept	European Water Label stand at Cersaie, Bologna 2016. European Water label holds a press event at Cersaie Bologna attended by major media titles and received support from Confindustria Ceramica, AVR and AZZURRA
2016 - Sept	The label goes to Estonia and heads for major presence in retailers
2016 - Sept	Discussion continues with WELL/EU-nited and the formation of three working groups looking at Technical Criteria, Marketing and Administration to bring two Schemes into One.
2016 - Oct	Currently 9,750 products live on the database
2016 - Oct	Supported by 115 registered brands
2016 - Oct	Further support from 52 partners
2016 - Dec	**Registered brands reach 120**

Milestones achieved have been significant since the formation of the Scheme in 2007. Key targets for its continued development are regularly identified and success monitored. As the market embraces the Scheme further targets are set, monitored and recorded.

10 Key goals were set enabling further development and support of the Scheme. 6 of these goals have been achieved, with the Scheme working positively towards the other 4.

- A target of 100 registered brands – this has been exceeded with 120 now supporting
- A database of 10,000 products by year end had been identified – due to the annual cleanse the database is currently sitting at 9,750 products. In total nearly 13,000 products have been registered through the Scheme.
- Raising visibility of the Label in the market place is a key target for the Scheme. Currently 47 websites are displaying the label. This is an increase of 27%, a positive step forward. Additional visibility of the label is shown in the appendix as retailers and merchants are seeing an increase in consumer demand for such efficiency information.
- A greater proportion of manufacturers literature and packaging is now carrying the label together with full explanation of the Scheme.
- At the beginning of 2016 the website and accompanying literature has been translated into Spanish, Turkish and German, with work commencing on the Italian translation.
- Market research was undertaken on the Polish market which identified key manufacturers. This resulted in discussions and meetings being undertaken and manufacturers joining the Scheme.
- A network of Agents – using the National Association platforms has been formed. To date; Spain, Italy and Turkey have confirmed. During the coming months discussion with other interested parties will commence.
- Raising awareness of the Scheme and improving visibility of the label require strong partnerships, this is an ongoing target for the Scheme.
- Held various discussion forums and developed a number of papers, including the review and Roadmap, sought comment from all registered brands at the time. A number of opportunities also arose which provided CEIR and FECS members a platform to input in to the continued development of the Scheme.
- During ISH 2017 an opportunity will arise for all registered brands to voice further comment on the future development of the Scheme.

As manufacturers emerge from the worst recession ever encountered by the Bathroom Industry, it is clear to see that progress is being made with support for the Scheme by the growth of registered brands and products and the inclusion of the label within websites, literature, packaging and product.

MARKET COVERAGE

During the last 12 months the European bathroom market has seen many changes; from restructure, acquisition and mergers, slow recovery from the global recession, fluctuation of currency, plus the growth of online channels to market. This of course changes the dynamics of the players in the market place. However, the Labelling Scheme continues to flourish and has steadily increased the market share it represents. Based on a 2013 market report (BRG) the market share of the current registered brands is 59% of the tap/shower market and 60% of the Sanitaryware market and growing as more and more products are registered!

The Scheme is now working closely with the registered brands to label all products that fall within the Scheme criteria. 2016 has seen a positive step forward with the label now being included in all new product literature, packaging, marketing material, and having visibility on registered brands exhibition booths. See appendix for examples of how registered brands are raising visibility.

Late 2016 and early 2017 has seen growing interest by European retailers to include the label within consumer marketing material and the growing number of manufacturer websites carrying information on the label has considerably increased.

STRUCTURE OF THE EUROPEAN WATER LABEL

The European Water Label is currently owned by the Water Label Company which is a not for profit company. The UK bathroom industry owns the Scheme IP. The Bathroom Manufacturers Association, the leading UK trade body for the bathroom industry is currently supporting the Scheme with additional resource and funding. The Scheme is moving ever closer to becoming self-financing and seeking independence. This goal should be achieved by the end of 2018.

An annual income of £250,000 is anticipated as a fair level to effectively operate the Scheme and support a proactive marketing function.

ADMINISTRATION

The administration function of the Scheme is undertaken by the Bathroom Manufacturers Association at its offices based in North Staffordshire England.

The Scheme operating functions are overseen at European level by FECS and CEIR. It is recognised that as the Scheme becomes widely accepted across Europe as the voluntary labelling scheme for water using products that a formal structure is implemented, engaging the support of a wider church of Associations.

With this in mind, and once the income has reached the appropriate level then the Water Label Company should become an independent not for profit body with an elected board from registered brands and/or supporters.

GOVERNANCE

As the Scheme moves to independence status a Board will be elected with representatives taken from the registered Stakeholders:

- Manufacturers, distributors, merchants
- Water utilities, NGO's
- Retailers
- National Government and/or Commission
- Trade Bodies

As the Scheme is European wide, representatives on the Board must address issues at a European level. The Board should be no more than 12 elected representatives.

Responsibilities of the Board include:

- Overseeing income and expenditure, addressing any arising issues
- Identify lobbying activity and the implementation required
- Set and aid delivery of key targets for the ongoing development of the Scheme

Although the UK has decided to leave the European Union, the UK will remain part of the European geographical area. The European Water Label is an Industry wide supported Scheme and will not be effected by the UKs political decision.

NATIONAL PLATFORMS

The Scheme remains, open, transparent and above all credible. All Stakeholders must have the opportunity to input and influence the progress, direction and ongoing development at European and National levels.

With this in mind and due to the broad geographical location of Stakeholders and the nuances of national requirements, National bodies will be encouraged to set up National Platforms and feed relevant information to the Scheme.

AGENT AGREEMENT

To aid in the growth of the Scheme across EU, The Water Label Company is working in partnership with National bodies who represent the differing sectors of the bathroom Industry. These National bodies will be recognised as 'Agents' and as such enter into an agreement to promote and progress the Scheme within their terrority and abide by the detail of the 'Agents Agreement'.

SCHEME FUNDING

As previously identified the income generated from the Scheme during 2015/6 reached £146,000. This is achieved by brand and product registrations.

EXPANSION OF THE SCHEME

An analysis of the current market, Industry players and market share across EU28 has identified key stakeholders within the manufacturing and merchant base. Participation by these is paramount to the ongoing success of the Scheme.

Greater visibility of the label is also key for the consumer. Research indicates that 80% of consumers undertake research via websites, select and purchase via many channels to market. The plumber and/or installer is influential when selecting the most suitable product for the individual consumer needs and compatibility with the building and infrastructure, which is key to ensuring efficiency measures. Recent research indicates that the consumer has identified the need for greater efficiency information for water using bathroom products, in particular water and associated energy levels.

Industry is leading discussion to bring the WELL (a labelling scheme developed by EU-Nited) and EWL Labelling Schemes under the same common label approach. Three Working Groups have been formed to address the challenges; technical, marketing and organisation. The culmination of this work will influence future direction and implementation process for the necessary changes and ensure the consumer is not confused with differing information.

MARKETING THE SCHEME

The Scheme is supported by 52 bodies who have pledged to disseminate information to all sectors of the European Bathroom Industry, these include water utilities, media titles, trade bodies across installer, merchant, retailer sectors and consumer groups. By utilising the National Platforms across EU28 greater awareness of the Label and wider dissemination of the water, energy link and efficiency messaging can be undertaken and achieve greater success.

The Scheme continues to issue regular information, press releases and dialogues with partners.

PARTNERSHIPS

Foundations already laid and continual dialogue with partners is now seeing positive progress with the Scheme. Three major European Associations representing the bathroom industry now fully support the Scheme with full support by 10 National Associations pledging to promote and raise participation from countries; Germany, Spain, Italy, Portugal, France, Turkey and the UK. Expanding these partnerships into other countries will strengthen the Scheme.

Research is already underway to expand market knowledge, identify key partners, merchants and retailers in Central Europe and the Nordic countries.

Discussions are ongoing to expand partnerships with National installer, merchant and consulting engineer groups as well as house builders.

Dialogue has begun with other National labelling schemes to ascertain a way forward in bringing all Schemes into one.

2017 TARGETS

As the Scheme enhances it is proposed that the following goals, to be achieved during 2017 will help to further develop the Scheme for the benefit of Governments, manufacturers and the most important the consumer.

- To simplify the market and ensure the consumer is not confused with a number of existing labelling the schemes, it is recognised that WELL and the European Water Label, the major two labelling schemes for water using bathroom products will identify during ongoing discussions a common approach. During 2017 discussions will find a conclusion.
- Industry will identify and include on the Label an energy icon which will provide information to the consumer on associated energy calculated which is relevant to hot water used. This will become a compulsory aspect of the Scheme for taps and showers.
- Industry will also identify a menu of additional feature icons that provide the consumer with information on energy related features that will help them make the right choice of product.
- Industry will seek wider support for the Scheme from the merchant and retail Industry across all 34 Countries.
- The Scheme will develop in conjunction with all partners a strategic plan to engage wider Industry in particular manufacturers from Central Europe and the Nordic Countries.
- The Scheme will seek greater engagement with key personnel at the European Commission and where necessary National Governments.
- The European Water Label will have a presence supported with manufacturers visibility of the Label at the ISH Exhibition. Other key exhibitions across Europe will also see the Label having a presence and visibility.
- A series of platforms to engage with wider Industry to further develop the Scheme will be utilised.

CONCLUSION

The European Water Label is an Industry backed voluntary initiative. The criteria has been harmonised to accommodate the nuances of EU28, written by technical experts working together with colleagues across Europe. It is the only Scheme that is fully European and one that addresses all water using bathroom products and working to expand into other water using product sectors.

The Scheme has the right credentials and support to aid the European Commission in achieving their goals in reducing water and associated energy. The Scheme disseminates the wider efficiency message in a cohesive way to influence the consumer immaterial of the channel to market through strong cohesive marketing material.

Ten years' investment and commitment by the wider bathroom Industry is now seeing the Scheme influence decision making in the market place and continues to take the consumer on the water efficiency journey.

This paper was produced by
Yvonne Orgill, Director, European Water Label
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