

# IMPACT REPORT

FIVE YEARS IN THE  
BUSINESS OF SANITATION:  
2016-2021

# Executive Summary

On behalf of the entire team at the Toilet Board Coalition, I would like to welcome you to our Impact Report. It reflects on the wide range of activities and tremendous accomplishments of the last five years and sets the stage for the next phase of growth and impact.

A new energy and buzz filled the air on the closing night of the Global Sanitation Economy Summit in November 2019 in Pune, India. 400 leaders – from small and growing businesses to sector-leading multinationals to government and public sector partners – shared their voices to create a step change in the global conversation of sanitation, a shift from talking about the untapped potential of the Sanitation Economy to showcasing it.

The momentum from that vibrant evening powered the Toilet Board Coalition through the early months of 2020. And then, COVID-19. Communities and businesses of all sizes grappled with uncertainty, overwhelmed systems, disrupted supply chains and a new virtual world. COVID further shone a spotlight on the vast inequities in access to sanitation and hygiene, driving unprecedented awareness and urgency. We adapted and launched our COVID-19 Action Plan with three pillars: Response, Responsibility and Resilience. We prioritised an immediate response to support our Accelerator companies – our largest and most diverse cohort to date. We sought to build long-term resilience by highlighting how these new business models and solutions of the sanitation economy could address inequities and how consistent contact and interaction with customers could be a powerful vehicle for new services focused on hygiene and public health.

2020 also marked the Toilet Board Coalition's fifth year in operation. Throughout the unexpected turns, we kept our eyes steadfastly on our mission – scaling private sector engagement to sustainable sanitation for everyone, everywhere and driving progress towards SDG6.2. In September, Cheryl Hicks stepped down from her position as inaugural Executive Director and CEO. Cheryl's personal contributions and leadership over the last five years shepherded the TBC from a promising concept into a global influencer. Building on the strong foundations she helped to establish and cultivate, we look forward.

Early in 2021, we asked members about the impact of the TBC on their organisations. Three words kept coming back in their testimonials - the power of the Coalition to accelerate, educate, and convene. In this report, we wanted to reflect on the wide range of activities and tremendous accomplishments of the last five years and to set the stage for our next phase of growth and impact.

To achieve our ambitious global goals, private and public sector partners must come together in new models – and the last five years have demonstrated the power of the sanitation economy to create sustainable, impactful solutions. With renewed energy, a more inclusive member model and focused, action-oriented Roundtables, the Toilet Board Coalition is stronger and better equipped than ever to deliver on the sanitation economy. We hope you enjoy the journey through these pages as much as we have and will join us in taking the next steps together.



**Erin McCusker**

TBC Chair

Vice President and Head of SATO, a part of LIXIL





# Our impact so far

Established in 2015, The Toilet Board Coalition (TBC) is a business-led membership organisation, driving private sector engagement in SDG6. We facilitate large-small company partnerships, public-private collaboration and run a business accelerator for SGBs (Small and Growing Businesses) to contribute to universal access to sustainable sanitation products and services.

Nearly half the world currently does not have access to safe sanitation, meaning they have a dirty unsafe toilet or no toilet at all, their waste is left exposed and untreated, and disease can run rampant. Sanitation systems have long been considered an expensive and solely public responsibility; however, this misconception is strongly linked to outdated technologies and approaches.

There is an army of entrepreneurs and businesses in our network challenging this age-old approach to sanitation and proving that sanitation businesses can grow and thrive whilst serving low-income markets through new approaches and a strategic enabling environment.

We are building the sanitation economy – a growing marketplace of products and services, renewable resource flows, data and information that is transforming cities, communities and businesses and driving progress towards the Sustainable Development Goals.



# After 5 years...

## 93%

Entrepreneurs completing the accelerator programme graduating with investment or partnership with a multinational

## \$10m

Invested in them in the past 5 years

## \$5m

In 2020

## 45

Sanipreneurs in our portfolio



## 12

Countries



## 5

Continents



## 3mt

Treated Toilet Resources in 2020



## 22kt

Emissions Mitigated in 2020



## 1.5m

People Impacted Daily



## \$22m

Facilitated into Private Sector Solutions to SDG6.2

## 22

Reports Reaching 10K People

## 100+

Events Attended - 22B Impressions Through Media & Communications



# Our values

- We are **business-led**. The Coalition advocates for private sector engagement and market-based approaches at every level of decision making. We believe the sanitation economy can contribute to bottom lines while improving lives and protecting our planet.
- We are **impact-driven**. Our work originates from and comes back to outcomes on the ground – customers served, waste recycled and revenue generated.
- We are **open**, we work with all sizes, geographies and sectors of business.
- We are a coalition, **we advance together**. Every project we take on involves multiple members to ensure the learnings, impact and value are optimised.

Our 2021 expanded membership model exemplifies this. We welcome all businesses and have a pathway for businesses of all sizes and backgrounds to engage in our work.



## How we work



### Accelerator

We run the Accelerator, an exclusive mentoring programme dedicated to strengthening sanitation economy business solutions that are scalable and resilient.

### Projects

We develop and implement bespoke projects to help businesses, cities, and communities implement sanitation economy solutions to meet their needs.

### Publications

We build and highlight the opportunities, evidence and new perspectives of the sanitation economy in media and publications.

### Investments

We work with the investment and donor community to facilitate and co-create impactful investments into the sector.

## Our vision

We envision a global marketplace – a sanitation economy – for self-sustaining and resilient sanitation systems that serve our population, strengthen our planet and generate economic returns for businesses of all sizes and geographies.

# The Coalition staff: our people



Greg Davies  
*Interim CEO*



Alexandra Knezovich  
*Director of Operations*



Christelle Donaldson  
*Director of Communications*



Venugopal Gupta  
*Director Accelerator Programme and Investor Relations*



Linda O'Neil  
*Executive Assistant*



Sunil Agarwal  
*Programme & Partnerships Leader*



Aishwarya Pramod  
*Accelerator & Investment Manager*



Sheeba Feroz  
*Community Engagement Associate*



Abelo Phiri  
*Accelerator and Pipeline Manager*



Anjanette Bansao  
*Programme Associate Southeast Asia*



# Our Leadership



**Erin Mc Cusker**  
TBC Chair  
Vice President and Head  
of SATO, a part of LIXIL



**Pascale Guiffant**  
Vice-Chair  
Founder of Vetea,  
TBC Independent Director



**John Short**  
Leader, Communications  
& Corporate Responsibility  
at LIXIL



**Jenny Lewis**  
Vice President,  
Foundation at Kimberly-  
Clark



**Jin Song Montesano**  
Chief Public Affairs Officer  
(CPAO) at LIXIL  
Corporation



**Shuchi Suri**  
Global Vice President –  
Home & Hygiene at  
Unilever



**Rajeev Kher**  
Founder of Saraplast Pvt  
Ltd, TBC Independent  
Director



**Ishtpreet Singh**  
Global Brand Director,  
Domestos at Unilever



**Tom Panella**  
Chief of Water Sector  
Group at Asian  
Development Bank



**Portia Persley**  
Deputy Director, E3  
Bureau/Water Office at  
USAID



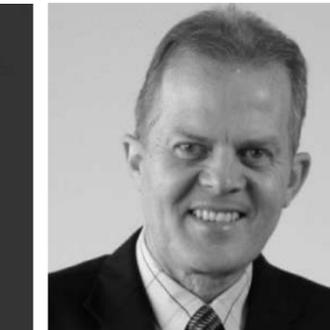
**Cinthya Ramirez**  
Director Multilateral  
Engagement, Pfizer, TBC  
Independent Director



**Jon Lane**  
Former Chief Executive  
WaterAid, Former  
Managing Director of  
WSSCC, TBC Independent  
Director



**Virgilo Rivera**  
Managing Director – Ayala,  
COO – Manila Water, TBC  
Independent Director



**Neil MacLeod**  
Former Head of Water and  
Sanitation of the eThekweni  
Municipality, Durban S.  
Africa, TBC Independent  
Director

# THANK YOU for this journey together

The Toilet Board Coalition exists and thrives today thanks to the energy and support of its incredible members and partners. Our work is inspired and shaped by the continuous efforts of our staff, the vision and commitment of our steering committee, the expertise

and thought leadership of our partners and the ingenuity and resilience of our entrepreneurs. There is still work to be done to scale the sanitation economy and, united as a coalition, we continue to come together to shape the future of the sector.



## Previous leaders



Cheryl Hicks  
*Inaugural CEO & Executive Director 2015-2020*



Charlie Beevor  
*Unilever 2017-2019 Chairman*



Mauricio Troncoso  
*Kimberly-Clark 2016-2017 Chairman*



Madhusudhan Rao  
*Unilever 2015-2016 Chairman*



Jean-Laurent Ingles  
*Unilever Founding Chairman 2015*

“ What makes the TBC different is that it has been able to think out of the box and look at ‘sanitation for all’ from a business perspective, rather than assuming that the public sector will somehow be able to address the sanitation challenge on its own - even though it has failed to do so for more than a century.

So the idea of a sanitation circular economy was born at the TBC – a concept that has now become universally adopted. This is just one example of the new thinking the TBC has initiated. There is growing recognition that the private sector has to be an essential player, with a supportive environment created by the public sector to facilitate the rapid roll-out of sanitation across unserved communities.

There are still obstacles to overcome though and more new ideas and technologies to develop into reality, in order to make circular economy thinking the platform on which sustainable sanitation businesses can flourish. Product safety, sanitation marketing, smart city thinking and revenue generation all come to mind.



**Neil MacLeod**

Former Head of Water and Sanitation of the eThekweni Municipality, Durban S. Africa, TBC Independent Director

“ TBC taught me a lot about private sector thinking and approaches, which has helped me to understand better, and hence promote, the role of the private sector. I have frequently used TBC's concept of the Sanitation Economy in explaining urban sanitation to other people.



**Jon Lane**

Former Chief Executive WaterAid, Former Managing Director of WSSCC, Current Chair Scientific Programme Committee for World Water Week, Stockholm International Water Institute

“ I have been involved with TBC since its inception 5 years ago. As independent director, I immensely enjoyed the interaction with my TBC colleagues as well as other stakeholders - most especially with the entrepreneurs thanks to their creative ideas and projects.

I am extremely proud that TBC, through the accelerator program, helped address the sanitation crisis which remains a big challenge for the whole world.

Finally, the knowledge products which TBC published helped scope the opportunities and threats linked to sanitation.

My affiliation with TBC will always be one of the most exciting experiences of my career and I wish its board and executive leadership more success going forward.



**Perry Rivera**

Managing Director – Ayala, COO – Manila Water  
TBC Independent Director 2016-2020

# Accelerating

The TBC was built around its Accelerator programme and now plays a strong role in scaling solutions across the sector:

- Helping social enterprises and entrepreneurs develop stronger businesses
- Creating pathways to scale for business models that have been proven viable
- Convening powerful players in the sector to move on large projects



100-150

Each year **100-150** organisations from 42 countries apply to the Accelerator

15-20

15-20 are shortlisted

5-10

5-10 are selected by sector leaders to enter the programme

# 5 YEARS OF THE ACCELERATOR

Since 2016 the Toilet Board Coalition's specialised corporate Accelerator programme has been supporting entrepreneurs with bespoke mentorship, partnership and the vision to scale their sanitation economy businesses. The Accelerator identifies promising business models with prospect to scale, matching them with expert mentors from across the TBC membership to address critical business challenges and ensure access to capital and partnerships for scale.

-  5 cohorts
-  32 companies
-  73 million customers
-  3.2 million tonnes of treated waste
-  22,000 tonnes of CO2 emissions mitigated

## EACH COMPANY IN THE PROGRAMME

Completes Unit Economics, Pathways to Scale and Investor Readiness curricula with TBC.

Codesigns and progresses through a work plan with their MNC mentor.



2016

Svadha, LIXIL PTS  
Laguna Water, RfD,  
Clean Team



2017

The Biocycle, Sanergy,  
Sanivation Samagra,  
Safisana



2018

Biomass Controls, Ti  
Bus, Garv, Blue Water,  
Company Tiger Toilet



2019

LiveClean ATEC Lootel,  
Saathi Joelex



2020

Bhumijo, Pit Vidura, Eram Scientific,  
Arrebol, H2O Sanitation, Pennine  
Energy Innovation, GreenPlat, Liquid  
Gold, PadCare, WASE, Ecodew



**93%** of entrepreneurs completing the programme graduate with an investment or MOU for partnership with a multinational company.



We have enabled **\$10 million** in investment into these SMEs over the last five years, with \$5 million of that in 2020.



We have hosted **15** professional development webinars in 2020 on subject such as:

- Data Analytics • HR • Consumer Insights
- Design Thinking • Legal Support
- Female Entrepreneurship • Microfinance
- Business Analytics • Business Resilience Planning

## 2016: YEAR OF FIRSTS

- **SVADHA** - First proven model of direct distribution of sanitation through an entrepreneurial network business model. • 200% increase in quarterly revenue in 2016 with TBC support.
- **LAGUNA WATER** - First large-scale, last-mile distribution of sanitation from a utility in an emerging market.
- **LIXIL UPT/PTS** - First aspirational redesign of a toilet for the BoP based on Toilet Board Coalition's improved sanitation toilet brief from the global sanitation community.
- **CLEAN TEAM** - First mobile money implementation to the end user in a sanitation business in Africa.



## 2017: BUSINESS MODELS & PROFITABILITY

- **BIOCYCLE** – Commissioning of first plant in Durban to process toilet resources.
- **SAFI SANA** - Introduced circular manufacturing opportunity to up-cycle sludge and organic waste from factories and local communities into renewable energy for manufacturing operations. Initial test with Unilever in Ghana, feasibility study with TATA Steel in India.
- **SANERGY** - Introduced 'Closing the Nutrient Loop' opportunity for nutrients in sanitation as a potential solution for nutrient deficiencies in agriculture/food/feed. The TBC network has enabled connection to food, agriculture and feed sectors
- **SANIVATION** - Discovery of highly-profitable business model: that, by adding toilet resources to charcoal as a source of fuel, value is exponential.
- **SAMAGRA** - Pivoted the community toilet business model from municipality-dependent and pay-per-use of the toilets to revenue-generating services.



## 2018: INVESTABILITY & PARTNERSHIPS

- Increased focus on investability.
- All cohort companies doubled their revenues.
- All have serious interest from commercial investors.
- Three of the four won important government tenders, providing significant scale-up opportunities in sales and the total number of beneficiaries of their products and services.
- Start of engagement with commercial investors from agriculture, clean energy and health.
- New Business Models: smart auto-cleaning toilets; BioSTP using tiger worms, decentralised sanitation with real-time monitoring through sensors, mobile urban toilet kiosk for women.
- India-specific cohort to bring additional focus on Swachh Bharat Mission.





## 2019: Making sanitation economy commercially investible

- New business models: community sanitation centres; waste-to-cooking-energy model for rural farming communities; biodegradable sanitary pads.
- Accelerator Programme reaches Zambia, Uganda, Cambodia and Bangladesh.
- Investment committee reconstituted with global strategic investors.
- First commercial investments enabled ~\$3 m.

## 2020: At the threshold of scale/scaling up the accelerator programme

- Largest cohort ever with 11 SME's.
- Women in the Sanitation Economy Innovation Lab in partnership with KCC.
- New business models: sustainable supply chain platform as a service, micro-entrepreneurship in urban wash, safe disposal of sanitary pads as a service, wastewater to energy.
- Accelerator Programme reaches Brazil and Peru in Latin America, whilst deepening presence in India and Africa (South Africa and Rwanda) - now 32 entrepreneurs across 11 countries in Asia, Africa and Latin America.
- Investments enabled ~\$5m – including covid-relief package in partnership with Aqua for All.



*"The TBC is supporting early stage sanitation companies and supporting their business practices. It has helped us develop our financial models and strategy."*

Thomas Fudge  
**CEO**  
WASE



# SANITATION ECONOMY INNOVATION LABS

INTRODUCING:

Powered by  
**TOILET**  
BOARD COALITION  
with strategic support from  
**Kotex**



## Innovation Labs

In 2020, we introduced the 'Innovation Lab' model, designed to target and catalyse market development around specific technological, business model, geographic and demographic areas of the sanitation economy. The vision for this programme is to incubate sanitation economy innovations and business models from various geographies, led by diverse entrepreneurs, so they are ready for acceptance into the Accelerator Programme.

Innovation Labs run for approximately six months, are sponsored by corporate partners and are designed to take earlier stage, pre-commercial businesses than the Accelerator Programme (which focuses on the growth stage).

Powered by the Toilet Board Coalition, with the strategic support of Kimberly-Clark under the Kotex brand, the Women in the Sanitation Economy Innovation Lab was the first Innovation Lab to launch. It intended to bridge gaps and empower organisations to implement sanitation solutions across various geographies by engaging these young companies in a focused mentoring programme.



“ The TBC has focused a diverse range of minds on the sanitation challenge, shaped the narrative around the sanitation economy and helped numerous start-ups in the space gain access to vital mentoring to scale up their operations and accelerate impact. The sanitation economy is now a vibrant and growing sector in so many countries around the world. The TBC has helped to demonstrate how the sanitation economy can and is helping communities gain access to critical solutions, expanding the treatment of waste and developing strong and sustainable businesses. Without the TBC, we wouldn't be where we are today.

I'm incredibly proud of LIXIL's role as a founding member of the TBC. As the TBC's activities and impact have grown, so have our relationship and involvement. As a leading global toilet manufacturer, the ability to work directly with early-stage sanitation entrepreneurs allows us to better understand the full range of issues being faced and to collaborate on solutions. Internally, it has helped us to amplify the potential of the sanitation economy in our businesses, including fostering new commercial business relationships with entrepreneurs and creating opportunities for employee engagement. Externally, the network of like-minded partners has accelerated partnerships and sharpened our investment in viable business models.

**Jin Montesano**  
Chief Public Affairs Officer (CPAO)  
Lixil Corporation



“ Over the last five years TBC passed a better understanding of the sanitary market in the world, as well as the difficulties of this market and the solutions in regions with less economic development on the planet. Furthermore, they presented the importance that large private brands have in helping to develop such sectors, regardless of the public policies linked to them.

TBC brought us the light about how relevant our business is to contribute to addressing the problematic of sanitation. In the beginning of our history, our company was very focused on solid waste. TBC brought us many opportunities, but the most important are the learnings and the self-consciousness about our role in sanitation; this empowered our team and as consequence we have specialised.

We are very excited and look forward to future partnerships.

**Francisco Miguel de Sousa Goulão Rego**  
GreenPlat



“ The TBC board, along with the proficient secretariat, has created what one could refer to as a cradle for sanitation entrepreneurship, focusing on the promotion and financial viability of innovative sanitation models within the circular sanitation economy.

They have created a robust ecosystem to nurture sanipreneurs and help them with a solid hand-holding cohort, followed by assistance to funding and growth from the TBC board. This board has large multinational companies offering their expertise along with subject specialists who are working to enhance the sanitation ecosystem and to create impact by monetising ideas to reality and thus improving the lives of people around the world.

**RAJEEV KHER**  
Founder of Saraplast Pvt Ltd,  
TBC Independent Director



# Accelerating Investment

The Toilet Board Coalition adds value by connecting exciting sanitation sector business to access to capital and identifying unique investment opportunities for investors. The Toilet Board Coalition's investment strategy enables faster and more efficient access to sanitation sector investment opportunities via:

- Regular review of new sanitation sector investment opportunities through our Investor Forum
- De-risking and reduction of transaction costs via Accelerator capacity-building and due diligence services
- Co-investment opportunities between like-minded investors
- Supporting the development of innovative investment mechanisms for the sanitation economy through our Investment Council.



**\$10M**

Since 2016, the TBC has facilitated \$10M in funding to SGBs in the portfolio through these mechanisms, \$5M of that in 2020 alone.



We need a revolution; we need to change the way we think and act about sanitation. We shouldn't focus only on the building of infrastructure as this leaves out the most important part to achieving the SDG, which is the sustainable delivery of these services - the right business models, policies and financing.

**Maria Angelica Sotomoyer**

The World Bank



Sustainable sanitation cannot be an either/or, it isn't either the government's responsibility or the private sector's. It must be a joint effort: private sector, donors and the public sector working together, and we at USAID are proud to be a part of scaling the sanitation economy with the TBC.

**Anand Rudra**

USAID



For a development innovation to be successful, engaging the local community and government is critical, particularly when it comes to sanitation. The TBC recognised this from day one.

**Andrew Taylor**

Grand Challenges Canada



Most conferences on sanitation talk about the problems; Toilet Board Coalition talks about solutions.

**Neil Dhot**

Aquafed

**AquaFed**

# Convening

The TBC has allowed more conversations and partnerships between different sectors, types and sizes of organisation:

- Connecting social enterprises with global brands
- Connecting governments with the private sector
- Connecting NGOs with the private sector
- Connecting investors with social enterprises



## 100+ CONFERENCES

Since 2016, the TBC has led more than 100 events around the world – introducing and advocating for the sanitation economy.

## WORKSHOPS

We host workshops with governments, academics and the development sector on how the private sector can complement their work.

## TBC SUMMITS

We have hosted two major summits, bringing together the unique stakeholder groups in our network to showcase sanitation economy solutions.

## EXCLUSIVE MEMBER MEETINGS

We gather Coalition members annually to connect, inspire new collaborations and support on-going programming.

# Bringing the WASH and business communities together to learn and innovate



# How the TBC impacts other organisations

## Diana Nelson

*Global Advocacy Director*

From discussions with the TBC and other members, we have advocated for better co-ordination, better collaboration, leveraging each other's resources and strengths to leverage scarce resources. It has activated us to think innovatively in order to design simple and “do-able” ways of mainstreaming MH solutions into the programme and infrastructure design happening in the sanitation economy.

## Jeff Hallowell

*Executive Chair*

The TBC has helped Biomass Controls with inventory financing for projects in India. In the future, I am excited to work with other sanipreneurs that are complementary.



## Jay Bhagwan

*Executive Manager: Water Use & Waste Management*

It has helped our own strategy and national roll-out process.



## Pete Dulcamara

*Chief Scientist & Technical Vice-President Designer*

I gain greater insights that I may not have found otherwise and always leave inspired by the passion, commitment, and progress of the entrepreneurs in the programme.

An aerial photograph of a lush green hillside with terraced rice fields. A small wooden house with a grey roof is visible in the lower right quadrant of the image. A large blue rectangular overlay is positioned in the center of the image, containing the word 'Projects' in white text.

# Projects

**SUSTAINABLE  
AGRICULTURE & ENERGY**

**SMART SANITATION  
ECOSYSTEMS**

**BEYOND ACCESS TO  
CUSTOMER EXPERIENCE**

# SUSTAINABLE AGRICULTURE & ENERGY

In 2016 the Toilet Board Coalition began the journey towards the circular sanitation economy with the publish of 'Sanitation in the Circular Economy', which looked at the potential of sanitation systems to integrate into biological waste systems and feed a circular economy of nutrients, water and energy. We followed this in 2017 with a more distinct look at the business models of this emerging economy. These two pieces and our work with the Accelerator cohort of 2017 laid the foundation for our collaboration with the Ethical Tea Partnership in 2018-2020 to develop innovative sanitation solutions that would improve the lives of tea communities, be implemented at scale and maintained effectively in the long-term. This project focused on building evidence that demonstrates the benefits of circular sanitation and the resources it provides: fuel, nutrients, feed and water for industry, in order to reach a tipping point where circular sanitation is accepted as best practice across the tea sector.

The findings, methodologies and toolkits developed are designed to be used in a variety of agricultural settings moving forward. The TBC published an interim findings report in 2018, 'The Sanitation Economy in Agriculture', and the final report in 2019, 'The Sanitation Economy at Sector Scale'.



In 2020 we have partnered with the Food and Agricultural Organization of the United Nations (UNFAO) to co-author a publication entitled 'Future Proofing Agriculture Systems' (released in 2021). This joint publication brings this thinking to the broader agriculture sector and calls on agricultural stakeholders to embrace and champion circular sanitation economy systems and products.

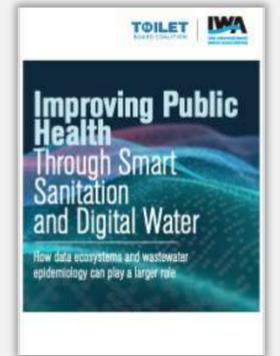


# SMART SANITATION ECOSYSTEMS

In 2016 the TBC published 'The Digitisation of Sanitation', which began as a study into the impacts of mobile money and smart technologies proved to open up a new area of potential value for sanitation businesses and their communities. Throughout 2018 and 2019, the TBC collaborated with the Pune Municipal Corporation to create an open Innovation Lab to test available digital technologies that could be applied to public toilets and treatment centres in the city. This led to the testing of new business models and a first attempt to understand the market potential for smart sanitation approaches. In 2018 we published an interim report, 'Smart Sanitation City' and in 2019 'The Sanitation Economy at City Scale', summarising the work accomplished and recommendations.

In 2020 we partnered with Microsoft to map out the stakeholders and ecosystem of a smart sanitation economy with public health-monitoring capabilities. Thirty different individuals joined the workshop from across the TBC membership and entrepreneur network. The mapping of this ecosystem has guided the TBC in further pursuits within this space and will inform future work.

The International Water Association (IWA) and the TBC co-wrote 'Improving Public Health Through Smart Sanitation and Digital Water' in 2020 to unpack the potential value of sanitation and wastewater-based epidemiology for public health monitoring. The paper calls on sanitation and water operators to consider and embrace the opportunities for their products and services to feed into a new digital public health ecosystem.



**20**

Partners



**32**

Sensors



**4m**

People



**\$58m**

In annual revenues



**2b**

Litres of toilet resources



**\$42m**

Per year of reuse products

**100**

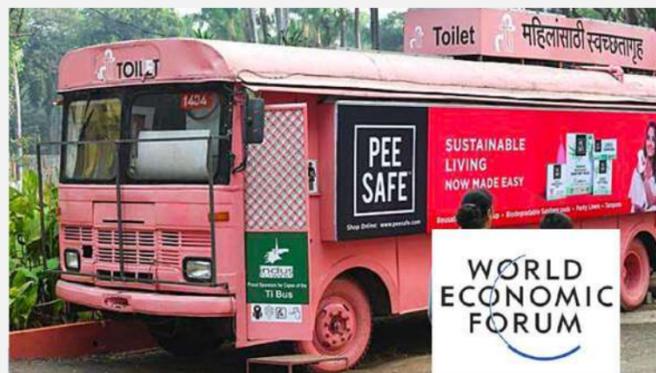
Smart cities in India could yield up to

**\$908m**

Revenue from smart public & community toilets

# BEYOND ACCESS TO CUSTOMER EXPERIENCE

Throughout 2020, the TBC team and partners in India have linked with the World Economic Forum to lead the Healthy Cities and Communities project in Mumbai. TBC India and Hindustan Unilever have worked with the Forum to identify scalable, sustainable sanitation services for urban low-income populations. In Mumbai, working with the Additional Commissioner of the Municipal Corporation of Greater Mumbai and local businesses, the partners worked to ensure access to basic sanitation services. This project concluded in June 2021 with the release of a 'Healthy Cities and Communities Playbook' that details the learnings from across the pilot cities for replication around the world. Through the project, The Ti Bus, a 2018 Accelerator graduate, has now had its model replicated in Jersey City in the USA.



Throughout 2019, Unilever, LIXIL, Firmenich, Veolia and Kimberly-Clark gathered to discuss what a five-star public toilet could be. These conversations, and the related workshop at the 2019 Global Sanitation Economy Summit, kicked off a consultation process to develop guidelines for a new public toilet standard that was focused on consumer experience. The publication presents those guidelines as a first step towards a new standard.



The Star Rated Public Toilet Guidelines are not only critical in fostering behaviour change, but they also cater for the well-being and dignity of sanitation workers, the environmental sustainability of operations and the inclusivity of their use. This guide is designed for city and national governments; sanitation entrepreneurs; toilet operators (public and private); NGOs; architects and engineers involved in designing and building public toilets; cleaning equipment manufacturers; and technology developers in the developing markets.



“ As the vice president of the Kimberly-Clark Foundation, I have worked closely with the Toilet Board Coalition for the past seven years, which has given me the unique opportunity to watch the organisation grow and evolve. Its unique model as a business-led coalition has enabled it to be a much-needed convener in the sanitation space, and the coalition has not only elevated the pressing challenges of the global sanitation crisis and the need for solutions, but it has created invaluable conversations around the sanitation economy and the multitude of opportunities that exist within it.

I've also seen the coalition illuminate the critical intersection between access to sanitation and menstrual hygiene management and show how this issue severely cripples women's progress. It's clear that sanitation is about so much more than just a toilet – it has the power to positively impact communities for generations to come, and I am proud of the impact we've been able to create together over the last several years as a result of our shared passion for making lives better around the world.

**Jenny Lewis**

Vice President, Kimberly-Clark Foundation  
Board Member, Toilet Board Coalition



“ The Toilet Board Coalition (TBC) has been a valuable resource and industry partner for ADB for a number of years now. Through a knowledge partnership agreement between ADB and TBC, awareness about the sanitation economy was increased within both ADB and our developing member countries. TBC's strong network within the private sector and business community has also been effective in helping ADB initiatives to increase private sector partnerships. With TBC, whose strength is in providing business-led partnerships and platforms for accelerating market-based solutions, ADB hopes to bring Asia and the Pacific closer to the goal of universal access to sanitation services. We look forward to continuing close collaboration with the TBC in the future.

**Neeta Pokhrel**

Chief of Water Sector Group  
ADB



“ It was an incredible opportunity to develop and launch the Women in the Sanitation Economy Innovation Lab with the Toilet Board Coalition to create shared value and drive meaningful societal impact. The programme was intended to cultivate early-stage ideas within the sanitation economy and featured five women-led and women's health-focused businesses. Around the globe, our employees from different functions mentored these female entrepreneurs and supported them in their journey to thrive, achieve their goals and contribute positively to some of the world's most pressing sanitation issues.

A lack of access to menstrual hygiene management in many parts of the world means that far too many women and girls miss work or school since they're unable to effectively and safely manage their periods. Our Kotex® brand's purpose is to ensure that a period never gets in a way of any woman's progress. The Innovation Lab aligns perfectly with this purpose and plays a crucial role in supporting entrepreneurs who understand the link between menstrual hygiene and sanitation and want to remove barriers for women.

The programme also presented a phenomenal development opportunity for our mentors as they learned about new markets, strengthened their leadership capabilities and diversified their roles. I cannot thank the Toilet Board Coalition enough for being such an incredible partner in this programme – we are looking forward to collaborating on the next chapter of it together!.

**Melis Sener**

Senior Marketing Manager for Adult & Feminine Care  
Kimberly-Clark



“ Achieving universal safe sanitation will require reaching an additional 3 billion people beyond those forecasted to get access by 2030. While this need exceeds what development donors can contribute, the private sector is uniquely positioned to provide the resources and innovation needed to close the sanitation gap. By providing essential business development services and connecting transformative sanitation enterprises with financing, the TBC accelerator is unleashing the power of the private sector to address the enduring challenges of providing global sanitation access. Going beyond these individual businesses, TBC’s work to define, document and strengthen the broader sanitation economy has demonstrated a path forward to achieving universal sanitation access.

**Portia Persley**

Deputy Director, E3 Bureau/Water Office at USAID



“ Malodour is a stigma of poverty. We are here to be the software of the toilet experience, changing how toilet users feel. First, we scale up the cleaning portion of the Sanitation Economy, making sure that our solutions are available in the products that are actually cleaning the public toilets. So it’s about transforming the way we work in our company to ensure that, across departments, we have members of our team engaged in the Toilet Board Coalition’s work on the sanitation economy.

**Bérangère Magarinos-ruchat**  
Firmenich



“ We need to create very strong social capital in the sanitation economy, we need to elevate those that are cleaning the toilets. We need to attract more youth into the sanitation economy, not just for a job but as an entrepreneurial opportunity - starting in schools to present it as an opportunity next to robotics or AI.

**Divyang Waghela**  
TATA Trusts

**TATA TRUSTS**

“ How do we create more talkability, more draw around sanitation? We must stay close to the consumer to understand how we solve these problems. How can we take these innovative new models that are working and integrate them into larger contexts? This will not be solved by one partnership or entrepreneur - we need to come together to achieve scale.

**Madhu Rao**  
Unilever





Even though in the depths of a pandemic, there is always opportunity and the passion for what we do. I've been able to army through any challenges with the right advice and mentorship. From that perspective, we thank TBC for its great network and it is a privilege to be amongst the innovators and entrepreneurs who are helping to achieve a very vital part of SDGs.

**Orion Herman**

Co-Founder  
Liquid Gold



I'm happy to say that we have made a few partnerships, especially with UNICEF, and we have already launched one with the units in Orissa and another one in South India. I think we are moving in the right direction with all the push we have from the TBC Thank you so much. We really enjoy the journey with you.

**Srija Santhosh**

Eram Scientific Solutions



My skills in the context of marketing and operations, from where we seek the corporate value, have definitely improved, we are able to communicate with the customers because of the continuous support of the TBC.

**Ajinkya Dhariya**

Padcare Labs



# Educating

The TBC plays a key role in educating people on the opportunities and impact of engaging the private sector in the provision of safely-managed sanitation for all:

- Sanitation business insights
- Cross-network and geography learnings
- Sanitation economy business model optimisation
- Investment de-risking



# Communications: changing the conversation

With the support of our 41 members and sanitation entrepreneurs, the Toilet Board Coalition is increasing the reach and understanding of the economic, environmental and social benefits of the sanitation economy.

The Toilet Board Coalition has been a pioneer in looking at sanitation through the lens of business opportunity and introduced the sanitation economy approach in 2017. Throughout 2020, we worked with members The World Bank and Asian Development Bank to refine and update our Sanitation Economy Market Estimate methodology. Beyond methodology, the Coalition's celebration of entrepreneurs and businesses leading in the space is shifting the reputation of the sector and as shown earlier, we are seeing investment follow.

**Creating a  
ripple effect**



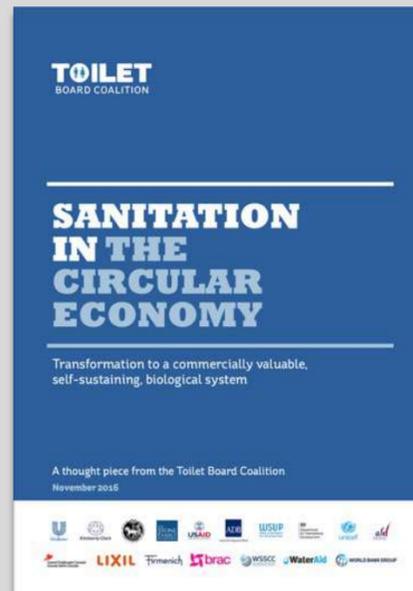
# 5 years of insights

2016



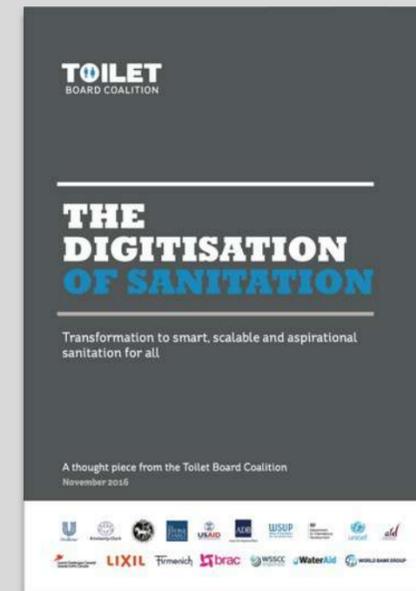
## Accelerating the business of Sanitation for all

A publication outlining why the Toilet Board Coalition exists, how it was developed and what it intends to do.



## Sanitation in the Circular Economy

This paper presents the findings of the Toilet Board Coalition's study on sanitation in the circular economy. Our intent is to present a number of business opportunity spaces, where we believe that value has been left on the table and customer needs unmet, which we recommend be explored further in the decade ahead.



## The Digitisation of Sanitation

In 2016 the Toilet Board Coalition ran a feasibility study to explore the potential role of mobile and digital applications to drive efficiencies and consumer demand in sanitation business models operating in low-income markets. This paper presents the findings of our study in the form of a thought piece on the topic of the digitisation of sanitation for all.



## Global Toilet Business Innovation And Investment Summit: 2016 Highlights

In 2016 the Toilet Board Coalition and the Confederation of Indian Industry co-hosted the Toilet Business, Innovation & Investment Summit, held in Mumbai, India. This report details the highlights and insights from the event.

Click on the images to download the reports



# 5 years of insights

2017



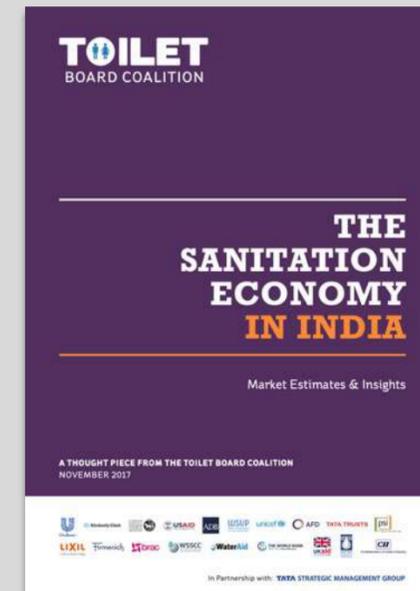
## Introducing the Sanitation Economy

This publication introduces the sanitation economy, why the Toilet Board Coalition developed the approach and the products, services, businesses and pioneers in the field.



## The Circular Sanitation Economy

This paper demonstrates the commercial viability of the circular sanitation economy, by backcasting from the future to envisage the new business models operating at city scale.



## The Sanitation Economy in India

In 2017 the Toilet Board Coalition introduced the sanitation economy approach and developed market estimate methodology. This report gives a first market estimate of a thriving sanitation economy in India in 2017 and 2021.

“TBC has opened doors for many entrepreneurs to be an active contributor to the circular sanitation economy via the cohorts and the support that the member companies have been giving to these nascent yet innovative and futuristic businesses. Creating a steady and solid pipeline of cohorts which would be investible and ready to scale using the wide network and connections that the alumni caters to is something that’s extremely unique and path breaking.

Saraplast has grown from cohort to being invested, thanks to the immense support received via TBC and helped the organisation to experiment and and research from the beat in the business and has given the confidence to work with innovative scalable models”

**Rajeev Kher,**  
**Saraplast Pvt Ltd**



# 5 years of insights

2018



## Beyond CSR to the Sanitation Economy

With this paper, we take stock of the current state of corporate engagement in sanitation solutions and build the case for businesses to move beyond CSR to unlock core business opportunities that lie within sanitation systems.



## The Sanitation Economy in Agriculture

This report outlines initial findings from our work with the tea sector in 2018, building a compelling economic case for circular sanitation economy approaches in agriculture.



## Smart Sanitation City

The Toilet Board Coalition (TBC) and the Pune Municipal Corporation (PMC) collaborated to develop the roadmap for the world's first Smart Sanitation City. This report presents interim findings, half-way through that 21-month project.

“TBC has pioneered the path for bringing large WASH corporations together with social enterprises to tackle sanitation and hygiene in development. The expertise from the corporations, like Unilever, helps position social enterprises to more sustainably scale and market themselves. TBC has also played a big role in the enabling environment, bringing sanitation to the table for important institutional conversations. TBC has helped lend credibility for the sector and allowed us to leverage that in conversations with partners, investors, and customers. We have received continued support through Unilever, from marketing to behaviour change to increasing fuel sales in Kenya at Unilever tea farms. This support and mentorship has been leveraged to secure additional investment, partners, and customers, allowing us to expand our work to new cities.”

**Kate Bohnert,**  
**Investor & External Relations**  
**Manager,**  
**Sanivation**



# 5 years of insights

2019



## Scaling the Sanitation Economy 2020-2025

This report shares the work of The TBC, outlining economic evidence, new business models, available technologies, and investment scenarios. It provides insights into how companies are going beyond corporate responsibility in water, sanitation and hygiene approaches; shares actions leading businesses are taking to bring new solutions; and recommends key steps businesses can take to unlock significant benefits for their company and society.



## The Sanitation Economy at City Scale

A call to action for city leaders outlining how digital technologies and data are opening up new ways to rethink sanitation services in cities and how new sanitation intelligence unlocks significant cost savings and new revenue potential for cities and businesses in toilets, treatment and health.



## The Sanitation Economy at Sector Scale

A call to action for sector leaders to look to sanitation to create new economic value and become a solution provider for urgent business and societal issues that address many of the Sustainable Development Goals - from water security, to climate change, food security and human rights.



## The Sanitation Economy opportunity for South Africa

A joint publication from the Water Resources Commission and the Toilet Board Coalition that outlines an action plan for business and innovation in sanitation for a sustainable future in South Africa.

# 5 years of insights

2020



## Make way for the future of sanitation

A joint publication from EY and the Toilet Board Coalition, outlining what makes new sanitation enterprise models work, presenting a compelling playbook for more businesses and communities to benefit from a transformational sanitation economy with the potential to improve hundreds of millions of lives.



## Showcasing the sanitation economy in action

In November 2019 the Toilet Board Coalition hosted the global network of business leaders and experts who pioneer new sanitation economy business models in Pune India at the Global Sanitation Economy Summit. This publication details the highlights and insights of the event.



## Improving public health through smart sanitation and digital water

A paper from the International Water Association (IWA) and Toilet Board Coalition (TBC), presenting a fresh vision of a public health ecosystem that extracts new value from wastewater, advocating that disease surveillance through sanitation and wastewater systems must become a key component of future disease outbreak prevention and management strategies for cities, communities, and businesses.



## Star Rated Public Toilets: TBC Guidelines

A first proposal of global, user-focused benchmarking guidelines for toilet operators to ensure a minimum quality of service and safer user experience, guiding operational priorities and investments in upgrading the customer experience.

# 5 years of insights

2020



## Sanitation Economy Markets: India

This publication details a market estimate and methodology for the size of the sanitation economy markets of products and services; renewable resource flows; data; and information at a country level for India in 2020, 2025 and 2030.



## Sanitation Economy Markets: Kenya

This publication details a market estimate for the size of the sanitation economy markets of products and services; renewable resource flows; data; and information at a country level for Kenya in 2020, 2025 and 2030.



## Sanitation Economy Markets: Nigeria

This publication details a market estimate for the size of the sanitation economy markets of products and services; renewable resource flows; data; and information at a country level for Nigeria in 2020, 2025 and 2030.

“TBC has been supportive of social enterprises that have the potential for scaling their business models. TBC has adapted, and continues to adapt, to find better ways to support those enterprises and help them get to the next stages of their development.

PSI's connection to the TBC has been valuable in terms of both sharing and applying knowledge and learning to improve local sanitation businesses. PSI implements large-scale sanitation market development programmes and has the opportunity to test business models at scale. PSI has a strong working relationship with LIXIL, having facilitated the introduction of SATO products to markets in Ghana, Benin, Cote d'Ivoire, Ethiopia and Senegal. Our membership of TBC has strengthened and deepened that relationship.”

**John Sauer,**  
Senior Technical Advisor WASH,  
PSI



# The roadmap to 2025

Having set solid foundations in our work and built strong momentum in the sector, the Toilet Board Coalition is now setting ambitious objectives to guide our next five years.



# Our vision, strategy and targets

VISION

A global marketplace – a **sanitation economy** – for self-sustaining and resilient sanitation systems that serve our population, strengthen our planet and generate economic returns for businesses of all sizes and geographies.

**Achieve SDG6 and support progress towards additional global goals.**

STRATEGY

## ACCELERATE

sanitation economy businesses in their path to scale

## CATALYSE

ecosystems and curate pathways for the private sector to grow and accelerate the sanitation economy towards SDG6

## PROVIDE

the vehicle for business, investment and governments looking for sustainable sanitation solutions and private sector engagement in WASH

TARGETS

**By 2025:**

Enable \$60 million in investment into sanitation economy SMEs.

**By 2025:**

15 million people impacted daily (customers served safely-managed sanitation on a daily basis through Coalition members).

**By 2025:**

Localised programming in the following additional key markets: South, East & West Africa, Southeast Asia, Latin America & Caribbean.

# Stay in touch



[www.toiletboard.org](http://www.toiletboard.org)



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**THANK YOU!**

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