



European Aerosol Federation



Annual Report 2014

The FEA (*Fédération Européenne des Aérosols* or *European Aerosol Federation*) was founded in 1959. Today, the FEA represents 18 European countries which include more than 350 small and medium-sized enterprises (SMEs) and multinationals active in the aerosol industry. It has also close links with aerosol associations worldwide.

Our Vision & Mission

The FEA provides the leading expertise for the European aerosol industry and aims to be recognised as a centre of excellence.

FEA functions as the European voice for the aerosol industry and as the European coordination office for its national aerosol associations in order to :

- improve the understanding of the European aerosol industry's point of view mainly towards the UN and EU Institutions
- collaborate with other business associations on an ad hoc basis
- develop the positive awareness of the European aerosol industry's values

Our Values

Within the aerosol industry, the FEA community works towards achieving sustainable economic growth by focusing on social and environmental responsibilities.

In practice this means :

- placing safe aerosol products on the market
- offering a unique, convenient and high performance product for everyday life
- constantly working towards technical and economic solutions to reduce the environmental footprint of aerosol products
- developing guidelines on industrial safety and promoting good industrial safety practices
- supporting safe and sustainable innovations by proactively proposing updated legal frame



FEA International Aerosol Awards

Hosted for 2013 in Spain by AEDA, the second International Aerosol Awards competition launched by FEA and open to aerosol component manufacturers, fillers, marketers, retailers the world over, was set around the ever-important themes of innovation and sustainable development. The winners were announced at the prestigious Gala Dinner held on Wednesday 25 September 2013.

Award for Innovation in Aerosol Package Design 2013 : Glow Spray - Lindal Group

GLOW SPRAY is a product which enables the user to spray "liquid" light onto every surface. By using the BI POWER technology both products are kept separately until the consumer presses the actuator. By opening the valve the two products mix in the actuator and a fluorescent liquid is sprayed.

The innovation could only be done thanks to Lindal's Bi-Power Valve, which is able to mix two products in the actuator or outside the actuator. Thanks to bag on valve technology the user is also able to spray 360° and the products stay separate from the propellant.



Award for the Most Innovative Aerosol Product : Granulox - Sastomed GMBH

The new hemoglobin spray GRANULOX for treatment of chronic wounds is one example of an innovative approach using BOV.

Insufficient oxygen supply to wounds has long been recognized as a central problem in wound healing. Hemoglobin is used in order to improve oxygen supply to chronic wounds.

GRANULOX is the first product to solve this problem, thereby decisively accelerating wound healing. The hemoglobin-based formulation sprayed onto the wound area is able to penetrate the exudate and thereby increase the level of oxygen in the wound.



Award for Environmental Achievement & Sustainability in the Aerosol Industry & Award for Most Creative Aerosol Marketing Strategy 2013 : Dry Shampoo - Henkel AG&CoKGaA

For re-launching into the market an already existing product that contributes to sustainability opening a gate to a new market category that is environment-friendly.



By launching their DRY SHAMPOO, Henkel is offering an alternative, disruptive approach to reducing the environmental footprint much more drastically. The cleansing principle of the Dry Shampoo is based on a formula containing rice starch which, thanks to the aerosol application, can be distributed evenly onto the hair and brushed off some minutes later. By using the Dry Shampoo the consumer is independent from their

usual "hair washing routine". Hair care is easy; it spares the use of warm water and also minimizes the need for energy-intensive blow drying. This cosmetic product innovation offers an intelligent, innovative and sustainable solution to the consumer.

Special Jury Awards :

**Schwarzkopf Color Ultimate - Henkel AG&CoKGaA
Mousse Absolute - L'Oréal**

For facilitating the application of a well-known product in the consumer's benefit, which is present across all the awarded categories.

These hair colouring products, through a series of technological innovations both in their formulation and packaging, make it easier for the consumer to use, opening a new window to a public that seeks convenience and comfort in application together with gentleness for the hair.



Europe – Global leadership and responsibility in aerosols



Rolf Bayersdörfer - FEA President

Continuous improvements and outstanding outputs depend strongly on people's skills. I would like to express my strongest thank you to the entire organization of committed National Associations, their delegates making huge efforts and putting in extra hours in the relevant subjects and in particular the extremely efficient, highly competent and successful office of FEA.

In the global aerosol industry, EUROPE is the region with the largest aerosol production volume and consumption worldwide. Many international players are also located here, expanding their products and innovations into the global market.

In this context European aerosol legislation generally paves the way for other regions too.

Despite EUROPE having much of a common history, it constitutes an extensive cultural and economic diversity that also influences the political European Union agenda and sets quite some challenges to the respective industries.

Among the recent examples the most prominent one is related to synchronization and harmonization of aerosol safety warnings.

The aerosol industry had closely followed the implementation process of the UN Global Harmonized System (GHS) in the EU thanks to its well-recognized experts and efficient networks. It was a significant achievement to successfully synchronise the Aerosol Dispenser Directive revision so avoiding a lot of additional work and costs related to multi-step changes in a relatively small time frame.

Last year the practical relabelling countdown till mid-2015 effectively started. All companies selling aerosol products are obliged to adapt the safety phrases and pictograms in this legal time frame, relying on the officially published revision in the different EU languages.

Timing and clarity of provisions are crucial for a successful process! Mid 2013 the 4th revision of the CLP Regulation was published and many companies immediately started the process to manage the deadline. However after only a few months modifications for safety phrases in various languages occurred, highlighting the complexity of EU processes and structure with its many languages. FEA had to update its labelling guidance for its

members more than ten times and some linguistic corrections are still expected !

On behalf of the European aerosol industry it is our call to all industries and regulatory bodies involved to implement a pragmatic approach for minor labelling variations. None of the labelling changes will affect consumer safety therefore a straight forward implementation and enforcement of new labelling provisions should be a joined target.

It has always been the clear objective of the aerosol industry to do its utmost to provide the best safety standards available. This objective is a commonly shared ambition and has been strongly and successfully exhibited at last year's global FEA Congress and Exhibition in Madrid. FEA is committed to continue improving safety taking into account new technology developments.

FEA is a key member of the International Liaison Committee (ILC) which allows exchanges of views, alignments on different issues and mutual understanding of the situation in different regions of the world. FEA's motivation is to take full drive and responsibility to foster harmonised standards and guidelines in close cooperation with its regional partners.

We would like to take the opportunity here, to thank all participants of the ILC for their continuous and valuable contribution to drive our common targets forward.

Last year the FEA Awards celebrated again the genius, creativity and technical excellence of the aerosol industry. In this respect contribution of packaging to innovation and sustainability is as important as formula innovations to meet consumers' expectations with the unique benefits of aerosol.



Alain D'haese - FEA Secretary General

FEA has also put enormous efforts into the future adaptation to the technical progress of the Aerosol Dispensers Directive, which is also linked to innovation and sustainability, in the context of compressed gas propellants and plastic aerosols.

To maintain and improve this quality level, the FEA organization also reflected on its operations and therefore established a single Expert Committee, which has already proven its benefits. It is always a risk to drive changes but the Board of Directors is committed to shape the organization for the future, to remain as efficient as in the past.

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Mr Gerhard Gribl | FCIO (Austria)

Mr Cristiano Siviero | AIA (Italy)

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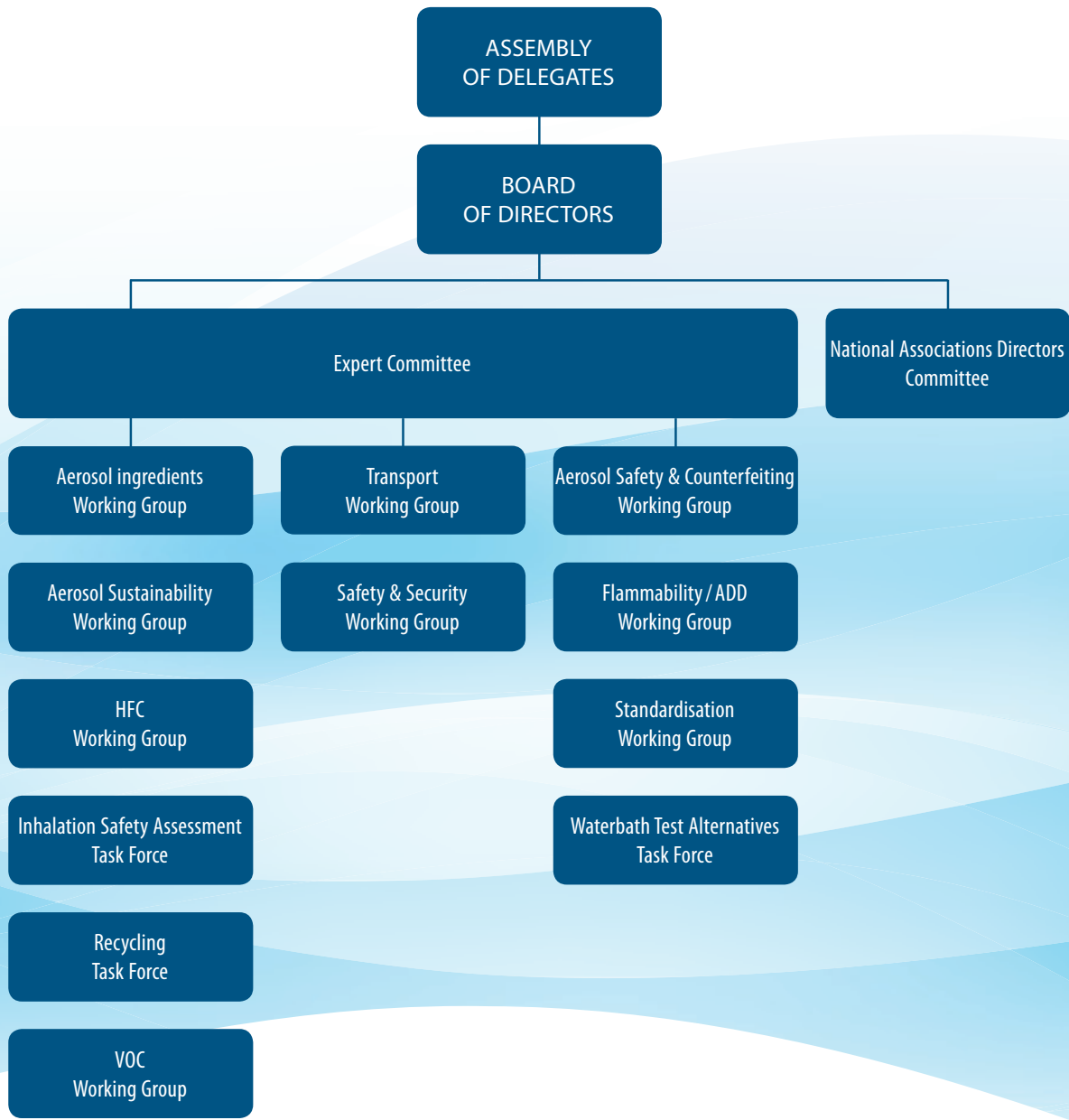
Mrs Pamela Bloor | BAMA (United Kingdom)

Mr Matthias Ibel | IGA (Germany)

Mrs Laurence Joly | CFA (France)

Mr Volker Krampe | IGA (Germany)

FEA Structure



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Report from the Committee of National Association Directors

The Committee of National Association Directors (CNAD) coordinates advocacy activities of the European aerosol industry which have to take place at national level in order to reach and influence both the Council of Ministers and the European Parliament. At the same time CNAD members have an important role to play in providing FEA with feedback on the implementation of European regulations at national level.



Matthias Ibel

On the basis of input from the delegates representing their national associations on its Expert Committee, FEA develops the messages to be conveyed to the European Commission, the UN and to all national government experts. This requires intensive planning, organisation and execution. It can be quite a challenge, in particular for the smaller national associations, who have extremely limited resources. The particularities in technology and benefits of aerosols are not always understood by regulators and all CNAD members do their best in transmitting the industry's positions to their respective counterparts at national level.

In the past year the CNAD again worked on many issues facing the industry, both at European and national levels. The need for coordinated advocacy activities was mainly related to the revision of the F-gases II Regulation, the implementation of the new labelling requirements in the Aerosol Dispensers Directive (ADD) and the CLP Regulation as well as the next adaptation to technical progress of the ADD.

On the basis of input received from CNAD members, FEA was able to circulate frequent updates of its briefing paper on the new GHS labelling, including errors and contradictions in several linguistic versions of the legal texts. Feedback by member companies and even by some national authorities confirmed that with this paper the FEA secretariat has compiled a very valuable document. It also allowed FEA to communicate swiftly to the European Commission the tremendous practical

problems caused by these inconsistencies. National Associations currently use it to promote a pragmatic approach of their respective national authorities with regard to the precise wording of the labelling. Regrettably the European legislator was not able to provide consistent provisions on the wording of the hazard and precautionary sentences in all language versions. Therefore FEA has rightly taken initiatives both at EU and at UN level asking for adequate flexibility in the practical implementation of these provisions.

In 2013 an internet consultation was issued on behalf of the European Commission with regard to the next adaptation to technical progress of the ADD. During this process CNAD members were able to provide their member companies with all necessary background information concerning the proposals which had been made by FEA several years ago, thus ensuring a broad participation of interested parties. In a meeting in November 2010 Member States representatives had already agreed in principle that the FEA proposals were feasible, but due to the delay of several years not all stakeholders – even within our industry – were still fully aware of the intensive work invested by FEA in preparing these proposals. The upcoming further discussions of Member States' representatives on the potential development of the ADD will obviously require even more efforts of CNAD members in conveying the positions of our industry.

Report from the Expert Committee



This is the first report of new FEA's Expert Committee. As a result of the discussion on how to improve the working efficiency of FEA and its delegates, the three Committees (Industrial Safety & Security, Packaging & Content and Health & Environment) were merged to a single group dealing with all aerosol-relevant topics. The Committee is managed by a Chairperson and two deputy Chairpersons. The aim of the Expert Committee is to take technical decisions ensuring that the Board of Directors can focus on strategic tasks rather than on day to day issues. The first meeting in March showed that this new concept allowed the better prioritisation of topics and gave sufficient time for detailed consultation.

Volker Krampe

This report gives a brief summary on subjects, which were followed by the Expert Committee:

In the phase of implementing the new labelling provision coming from the UN GHS system into European law, the CLP regulation has been full of translation errors with respect to hazard and precautionary statements applicable to aerosols. This has a significant impact on our industry as in most cases empty aerosol containers are pre-printed during their production process and well ahead of their filling. FEA supported member companies by monitoring and distributing all relevant differences. They asked National Associations to correct wrong statements and to report those back to the Commission, and to make the enforcement authorities aware of the problem and to ask for a common sense approach when checking products on the market. Finally, by going to the UN to ask for a tolerance of minor linguistic variations, the impact on future labelling changes will be reduced because minor linguistic differences having no meaningful impact on the interpretation of the phrase might be defended with this approach even before it is legally implemented.

In parallel the European Commission (DG Enterprise) Impact Assessment Study through RPA Consultants for the increase of maximum allowed pressure at 50°C to 15 bar for aerosols using compressed gases and the allowance to market plastic aerosols

with a brimful capacity up to 1 litre was published. A meeting of the EC Expert Group was supportive for the 15 bar proposal in principle. But the meeting was inconclusive on plastic aerosols because the Commission and national authorities were willing to see more test data, which were not released at the time of the RPA study, before supporting proposed changes for plastic aerosols. FEA, in close contact with the Commission and the Member States' experts, will continue to coordinate information release and all needed actions to achieve an adaptation to technical progress with both changes in the shortest time possible, as this project has already been on the Commission agenda for 4 years. FEA expects that Member States' experts will provide written comments to the Commission to allow moving this dossier forward without delay.

The F-gases II Regulation was published in May 2014. Following FEA's voluntary initiative to limit the use of HFC propellants in aerosols since 2002, it supported an HFC phase-down without additional HFC bans, as proposed by DG CLIMA, to allow industry time to re-formulate. However the European Parliament favoured a conservative command-and-control approach in banning HFCs use in technical aerosols from 2018. Additionally legislators imposed new labelling provisions for aerosol products using HFCs, to be implemented within an unworkable timeframe of seven months.



FEA continues to be involved with other Downstream Users of Chemicals Coordination group (DUCC) members on the implementation of REACH Regulation. This means a high involvement and support to the ECHA Chemical Safety Report (CSR) Roadmap as well as in the development of Specific Consumer Exposure Determinants (SCEDs) and the drafting of ECHA Downstream Users' Chemical Safety Assessment (DU CSA) guidance.

After the publication of the Guide on Inhalation Safety Assessment for Spray Products, produced in a fruitful collaboration with A.I.S.E, Cosmetics Europe and R.I.F.M. a scientific peer-reviewed article was subsequently drafted and published in Toxicology Letters, for which FEA also funded its open access.

The implementation of the new Seveso III Directive was also monitored by FEA. As the change towards a net content (from flammable contents) based approach was based on a theoretical averaging methodology, it will be very interesting to see whether the number of Seveso sites will change after June 2015, the deadline for implementation. The authorities' expectation is that the overall figures will not change significantly, which has still to be proven. The new 'Aerosols' entries have also created some unexpected negative administrative impacts in a few countries.

Laurence Joly

With regard to dangerous goods, FEA is monitoring the trial phase in the UK postal service to allow small amounts of aerosols to be shipped by post. If this trial is successful the provisions might potentially be used by other countries' postal services. A discussion at the UN Subcommittee of Experts on the current packaging provisions for aerosols with respect to the possible movement of cans in the packagings ended with a practical clarification. The term "excessive movement" for packagings and "dangerous movement" for large packagings were used to make clear, that the cans themselves are robust articles, safe for transport.

The FEA International Exhibition & Congress in Madrid in September 2013 was a great success. Many thanks to our Spanish colleagues from AEDA for organizing the event. With presentations and discussions on, for example, Sustainability and Safety during the congress key topics of the Expert Committee were discussed and brought to a wider audience.

Last but not least we thank the FEA Board of Directors for their trust and support as well as all Committee members, the chairpersons and the members of the Working Groups for their important involvement and contributions.

Pamela Bloor

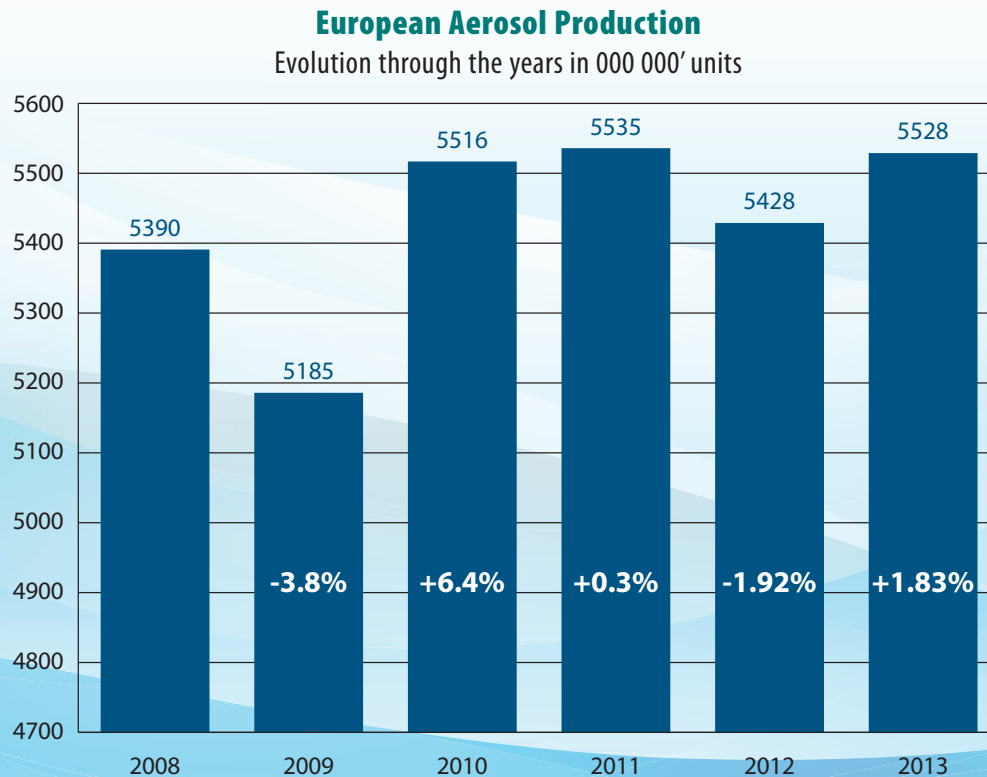


Facts & Figures

Aerosol containers are primarily made of steel and aluminium whereas glass and plastic containers remain marginal.

Cosmetics and household products represent approximately 80% of the European production.

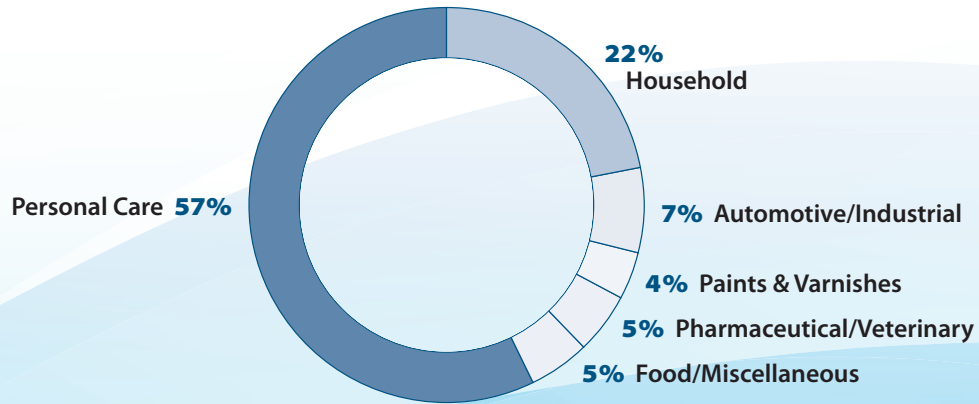
Europe is the world's larger filler with 5.5 billion produced in 2013.



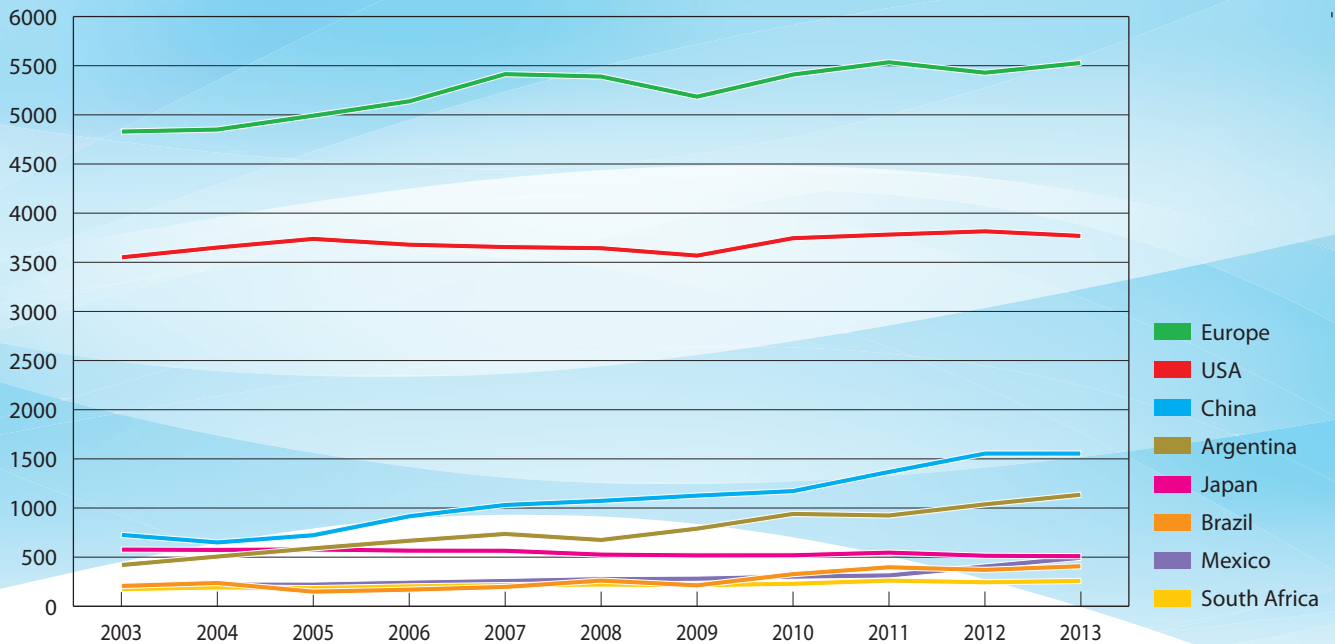
The full FEA statistics report 2013 can be downloaded free of charge on FEA website : www.aerosol.org

European Aerosol Production

2013 Products Breakdown



Worldwide production is today estimated at 15 billion units



Congresses & Exhibitions

| Year | Venue | Congress | Exhibition |
|------|-------------------------|----------|------------|
| 2016 | Istanbul, Turkey | ✓ | ✓ |
| 2013 | Madrid, Spain | ✓ | ✓ |
| 2010 | Rome, Italy | ✓ | ✓ |
| 2007 | Manchester, UK | ✓ | ✓ |
| 2005 | Athens, Greece | ✓ | |
| 2003 | Nice, France | ✓ | ✓ |
| 2001 | Maastricht, Netherlands | ✓ | |
| 1999 | Athens, Greece | ✓ | ✓ |
| 1997 | Venice, Italy | ✓ | |
| 1995 | Glasgow, Scotland | ✓ | ✓ |
| 1993 | Seville, Spain | ✓ | |
| 1991 | Hamburg, Germany | ✓ | ✓ |
| 1989 | Nice, France | ✓ | ✓ |
| 1987 | Amsterdam, Netherlands | ✓ | |
| 1985 | Lugano, Switzerland | ✓ | ✓ |
| 1983 | Firenze, Italy | ✓ | |
| 1981 | Barcelona, Spain | ✓ | ✓ |

| Year | Venue | Congress | Exhibition |
|------|------------------------|----------|------------|
| 1979 | Nice, France | ✓ | |
| 1977 | Brussels, Belgium | ✓ | ✓ |
| 1975 | London, UK | ✓ | |
| 1973 | Montreux, Switzerland | ✓ | ✓ |
| 1971 | Amsterdam, Netherlands | ✓ | |
| 1969 | Nice, France | ✓ | ✓ |
| 1968 | Vienna, Austria | | |
| 1967 | Berlin, Germany | ✓ | ✓ |
| 1966 | Barcelona, Spain | | |
| 1965 | Milan, Italy | ✓ | ✓ |
| 1964 | Helsinki, Finland | | |
| 1963 | Brighton, UK | ✓ | ✓ |
| 1962 | Barcelona, Spain | | |
| 1961 | Luzern, Switzerland | ✓ | ✓ |
| 1960 | Düsseldorf, Germany | ✓ | |
| 1959 | Paris, France | ✓ | |

List of publications

Publications available on FEA website : www.aerosol.org

| | | |
|-----------------------------|---------------------------|----------------|
| FEA 2011/2012 Annual Report | English | Free of charge |
| FEA 2012/2013 Annual Report | English | Free of charge |
| FEA 2013/2014 Annual Report | English | Free of charge |
| FEA 2011 Statistics Report | | Free of charge |
| FEA 2012 Statistics Report | | Free of charge |
| FEA 2013 Statistics Report | | Free of charge |
| FEA Standards | English - French - German | Free of charge |

FEA Guidelines

| | | |
|---|---------|-------|
| Guidelines on Basic Safety Requirements in Aerosol Manufacturing | English | 100 € |
| Guidelines on Basic Safety Requirements in Aerosol Storage | English | 100 € |
| Guidelines on Basic Safety Requirements in Laboratories dealing with Aerosols | English | 100 € |
| Guide on Particle Size Measurement | English | 100 € |
| Guide on Hot Waterbath Testing and its Alternatives | English | 100 € |
| Guide to using LCA | English | 100 € |
| Guide on Inhalation Safety Assessment for Spray Products | English | 100 € |
| Guide on Recycling Post-Consumer Aerosols | English | 100 € |

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