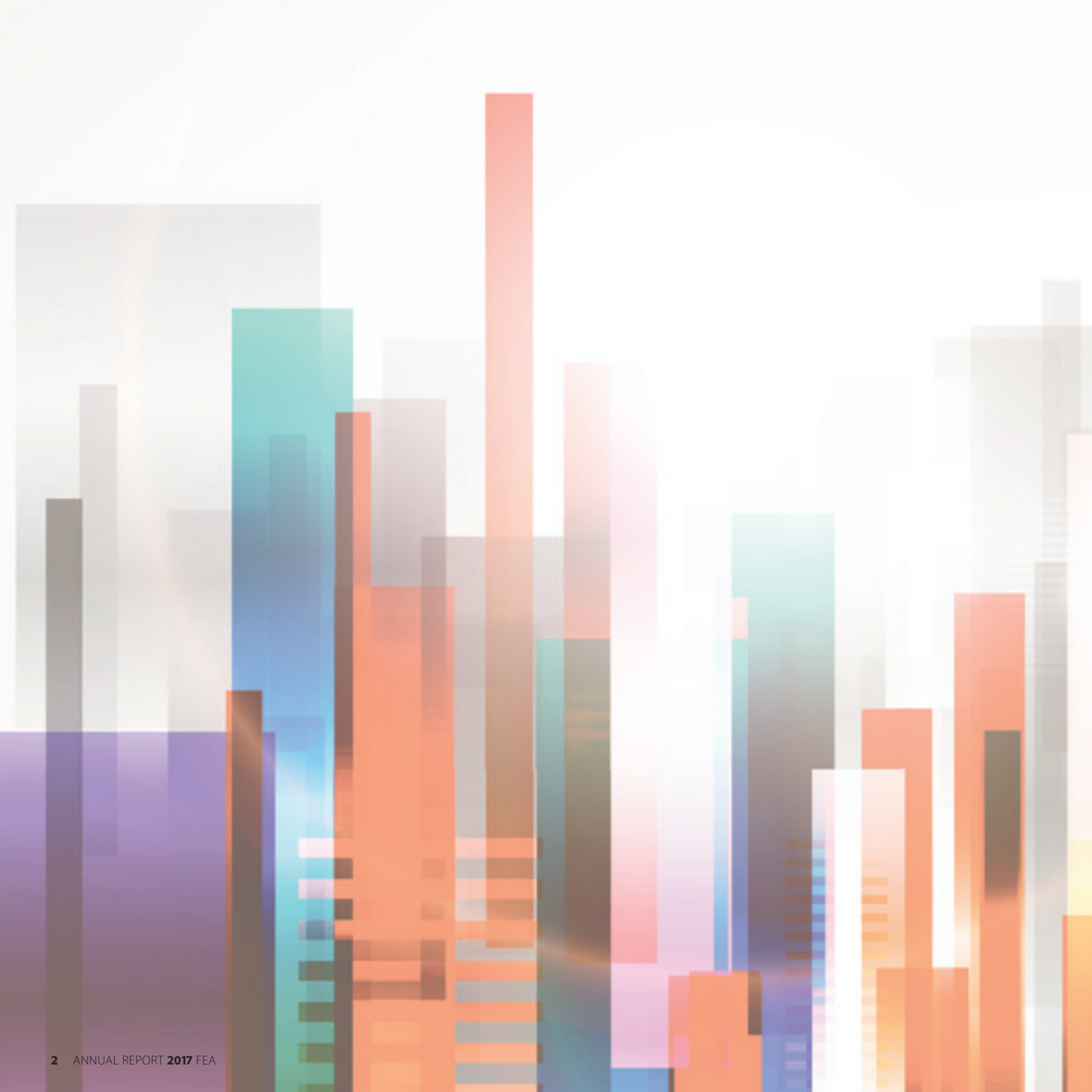




European Aerosol Federation



Annual Report 2017



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 :

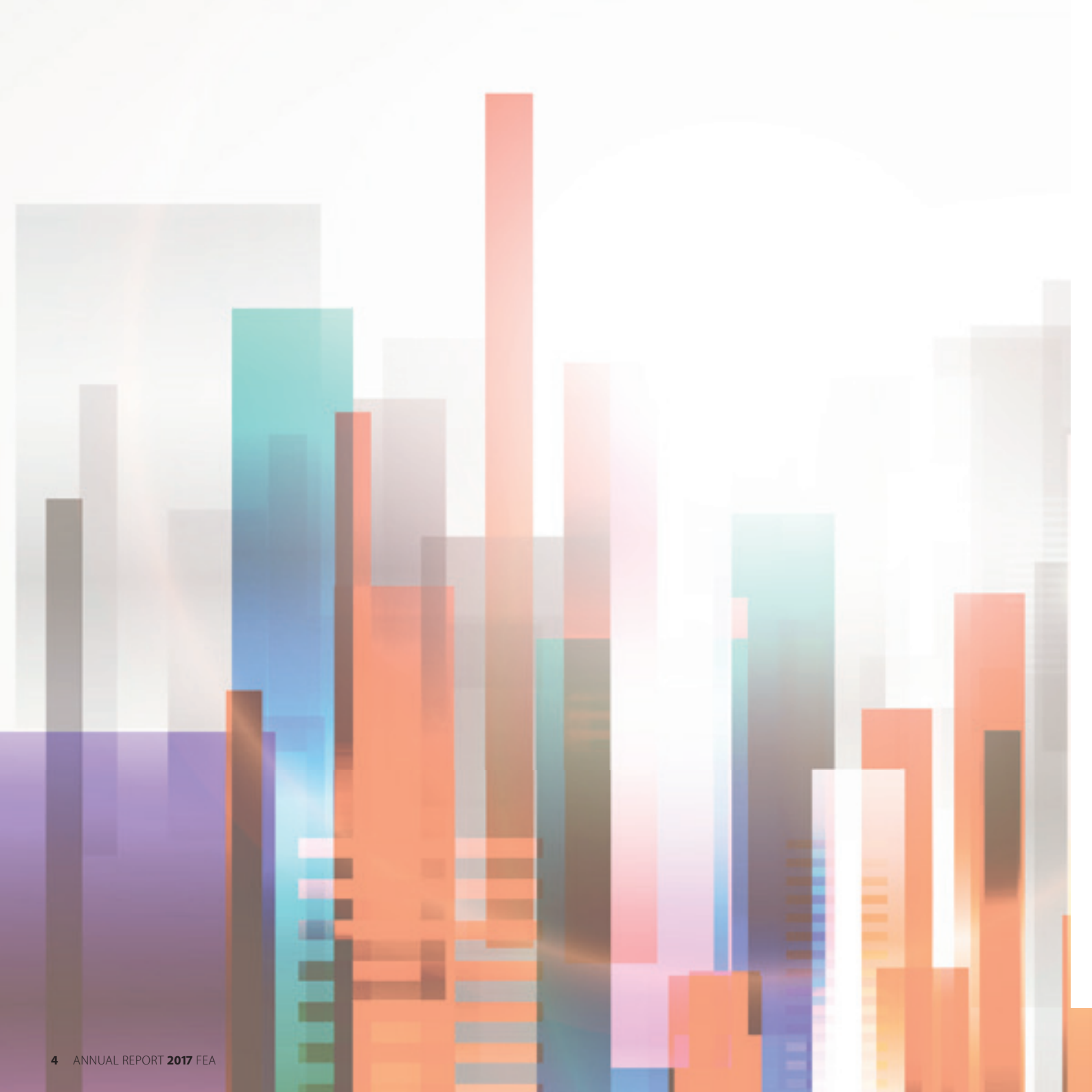
- ▶ improve the understanding of the European aerosol industry's point of view mainly towards the UN and EU Institutions
- ▶ collaborate with other business associations on an ad hoc basis
- ▶ develop the positive awareness of the European aerosol industry's values

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





Dr. Rolf Bayersdörfer
FEA President

Missed opportunities?

European economy is catching up widely. However, there are signs of slowing down businesses in some aerosol product categories, which makes the total production volumes stagnating. However, we are still talking about a global lead vs. other regions when concluding with 5.6 billion of aerosol dispensers which were produced in 2016.

We take this position very seriously when looking into the responsibility that comes with it. Therefore, it is a real pity that Aerosol Istanbul 2016 in Turkey has not been realized despite all the effort that was put into by the Turkish association ASAD and the FEA office. I firmly believe it would have helped to connect the world of aerosols even closer.

It had been an extremely difficult decision to put personal safety into proper perspective to business aims and efforts by exhibitors and organizers. I regret all monetary implication that decision may have brought to you as companies or in person but I am confident it was the right choice we made.

Looking into the future, we do our best to draw the right conclusions out of it and implementing it for the future events.

As already announced at different occasions FEA takes over the lead for future international Congresses and Exhibitions where the FEA staff - in cooperation with a professional organization team - develops new and inspiring concepts for those events.

It is our ambition to attract not only technical experts but experts from all sorts of functions, be it marketing, supply chain or product/packaging development and purchasing.

FEA is not only aiming with these kind of events to attract new people to the business and into regulatory topics. Recently we have presented some very successful webinars which have received extremely positive feedback from participants. Topics such as new guidelines or updates on regulatory subjects are presented or, on an annual basis, industrial safety is shared with newcomers and those who need an update.

The evaluation of the Aerosol Dispensers Directive, its last adaptation which allows new product development when using compressed gases, and the on-going discussion for a next adaptation related to plastic aerosols confirm the need for a deep expertise in different domains within the aerosol industry.

As a matter of political processes, we are all facing "Brexit" with as much of pragmatism as possible. BAMA, our largest national association, and FEA are closely monitoring the progresses

among our politicians. However, we are all committed to maintain our highly efficient and productive way of operation that no competence and input will get lost throughout the process and after.

This is also underlined by the continuous support in the global network where the International Liaison committee (ILC) agreed on driving some first projects further to emphasize the global relevance of our product format and the need to strive for global standards, harmonization and safety prerequisites.

An outstandingly strong bridgehead in America was Doug Fratz, who, for many years formed a very constructive, amical and competent partnership with FEA. We are very sad that he is no longer with us but we are also very grateful for all his support over the years. We will keep him in strong memory and we are committed to build upon his heritage in our relationships with the U.S. aerosol organization CSPA.

As Doug was a very committed and strong example of personal commitment to the subject of aerosols, I would like to underline that we do need at local country level as much as on the international floor strong personalities who are adding their expertise to the portfolio of competencies in our world of regulations and political networking.



Alain D'haese
FEA Secretary General

We, Alain and I, want to thank everyone personally who has, and continues to be, engaged in our subject matters for their involvement. We appreciate all your contributions and efforts made... We would not be as successful to maintain the aerosol industry as a safe and sustainable working environment without your personal dedication. Thank you for your work in Brussels as well as in your countries and companies.

Having said so, I am extremely grateful for all the work the FEA Secretariat and individual working group and committee members have been achieving with a lot of personal commitment and energy.

When the next FEA Annual Report is issued, we hope we will meet you at the FEA Global Aerosol Events 2018 in Düsseldorf, Germany. It will be a new milestone in the history of Aerosol Congresses & Exhibitions and should be the place where the entire aerosol world is meeting, inspiring and exchanging.

Dr. Rolf Bayersdörfer
FEA President

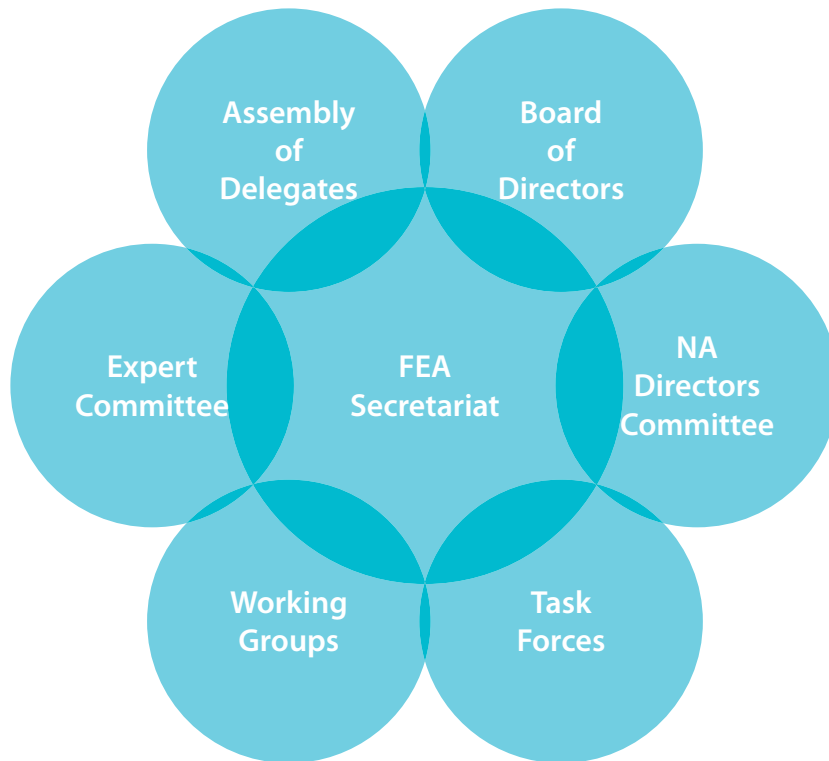
Alain D'haese
Secretary General

FEA Board & Secretariat



Our Structure

An ongoing dialogue
between
all our members





Matthias Ibel

Report from the Committee of National Association Directors

The Committee of National Association Directors (CNAD) coordinates timely and focussed advocacy activities of the European aerosol industry, which have to take place at national level. In the past year, CNAD members again worked on many issues facing our industry, both at European and national levels.

In 2016/2017 the CNAD continued to coordinate activities related to the evaluation progress of the Aerosol Dispensers Directive (ADD), which culminated in an internet consultation at the end of 2016. The Aerosol Dispensers Directive (ADD) contributes greatly to an effective operating market for aerosols within the EU as it provides a clear and harmonised standard of safety and secures the free movement of safe aerosol products. CNAD members helped to spread this positive message by encouraging their membership to participate in the consultation. Other CNAD activities were related to the continued discussions on the expected adaptation to technical progress of the ADD with regard to plastic aerosols and, at UN level, on minor linguistic variations of H- and P-statements.

The CNAD is also the place where representatives of national associations support and learn best practice from each other and where they regularly exchange information on national issues and their respective communication activities. A good example in the past year was a presentation given by Patrick Heskins, BAMA's Chief Executive, on their project 'The Future of Aerosols 2'.

Furthermore the CNAD looked into potential consequences of the Brexit for FEA advocacy. BAMA is the largest national aerosol association in Europe and BAMA's valuable support will in any case remain of key importance for the FEA network. It must be

noted that important topics for the aerosol industry like GHS and the transport of dangerous goods are mainly handled at UN level and not in Brussels.

A strong network of national associations is essential for a successful representation of the European aerosol industry. Whilst the FEA office is focussed on contacts with the European Commission, it is the national associations which pass our industry's views to the representatives of their national Governments in Brussels and Geneva. Unified by the same ambition the CNAD has developed an exemplary team spirit allowing for a fruitful cooperation.

Matthias Ibel
Chairperson of the CNAD

Report from the Expert Committee

The Expert Committee continued to make sound decisions ensuring that all relevant technical issues are properly discussed and managed but not re-discussed in the Board of Directors. Laurence Joly led the two last Committee meetings in October 2016 and March 2017.

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

The Aerosol Dispensers Directive was adapted for the fourth time since 1975. This adaptation is important for two reasons. First it allows the increase of the internal pressure at 50°C to 15 bar for aerosols using non-flammable compressed and dissolved gas propellants. This offers new opportunities to innovate with products using propellants like air, nitrogen or carbon dioxide. The high level of safety has been maintained. It means that new metal containers will need to resist a pressure of 22.5 bar without deformation or leakage, and 27 bar before bursting. Second it increases legal clarity and coherence with the labelling requirements of the CLP Regulation (EC) No



Laurence Joly

1272/2008 without however imposing any new obligations. This will avoid potential mistakes in different linguistic versions when inevitably further changes in labelling will be adopted.

The Industry provided data to the EC consultant *Technopolis Group* which was commissioned by DG GROW to evaluate the Aerosol Dispensers Directive. We take this opportunity to thank the numerous companies which provided data and replied to the different requests and consultations during the evaluation process. The final report demonstrates there is no real need to change the policy approach. This point of view is shared by the aerosol industry.

A negative side effect of this evaluation process was a new long delay in discussion for a fifth adaptation of the Aerosol Dispensers Directive related to plastic aerosols. Innovative plastic aerosols will provide a wider choice to consumers, without compromising user safety. However the current delays impair the European aerosol business growth as well as its leading global role.

The revised transport provisions in ADR 2017 include the following main changes: legal clarification that aerosols are articles under ADR, legal clarification about excessive movement in packing instruction P207, and a new aerosol-specific packing instruction LP200.

The revised UN Globally Harmonized System of Classification and Labelling of Chemicals (GHS, Rev.7) 2017 includes new provisions on minor linguistic variations in precautionary statements that appear on labels or in safety data sheets. They may incorporate minor textual variations from those set out in the GHS where these variations assist in communicating safety information and the safety advice is not diluted or compromised i.e. spelling variations, synonyms or other equivalent terms appropriate to the region where the product is supplied and used. This is a great achievement because minor changes will no more trigger unnecessary costs to re-label aerosol dispensers.

The *International Liaison Committee* (ILC), which is the global platform for aerosol associations, held a teleconference in October 2016. The teleconference started with a minute of silence dedicated to the sudden loss of our regretted colleague and friend Douglas FRATZ from CSPA who passed away on 27 September 2016. The ILC agreed to work on harmonisation of industry standards in prioritising three test methods, to be selected at the next ILC meeting in September 2017. The ILC will additionally start compiling data for an Annual Global Aerosol Production.

The Expert Committee approved two revised FEA Guides:

- a revised *FEA Guide on Hot Water Bath Testing and Its Alternatives*;
- a revised *FEA Guidelines on Basic Safety Requirements in Laboratories dealing with Aerosols*;

The Expert Committee also approved a new *FEA Guidance on Faulty Aerosol Recall/Withdrawal* which was developed by active members of an *ad hoc* Task Force and through a wide industry consultation.

The Expert Committee also established two Task Forces:

- the Hot Waterbath Test Alternatives TF
- the Plastic Aerosols TF

Finally we would like to thank the co-operative Committee members for their fruitful discussions and their input, based on deep expertise. We also have to thank the Board of Directors for their trust and support and the FEA secretariat for their excellent work.

Companies are key in allowing their experts to share their experience and knowledge for leading the whole aerosol industry. We remain fully convinced that this is a sound investment into the future of aerosols.

Laurence Joly | Volker Krampe
Chairpersons Expert Committee

Global Aerosol Events 2018

04-05 October 2018 | Düsseldorf, Germany



Connect to the largest full supply chain
of aerosols exhibition worldwide



Participate to challenging round-tables
and discussions with leading experts
and inspiring speakers



Share the prime of global aerosol trends,
give your business a step forward

Book your stand now !

Mrs Belgin Topkaya

+32 2 880 04 64

fea2018@semico.be

FEA Exhibitions and Congresses from 1959

Year	Venue	Congress	Exhibition
2018	Düsseldorf, Germany	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2016	Istanbul, Turkey	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2013	Madrid, Spain	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2010	Rome, Italy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2007	Manchester, UK	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2005	Athens, Greece	<input checked="" type="checkbox"/>	
2003	Nice, France	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2001	Maastricht, Netherlands	<input checked="" type="checkbox"/>	
1999	Athens, Greece	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1997	Venice, Italy	<input checked="" type="checkbox"/>	
1995	Glasgow, Scotland	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1993	Seville, Spain	<input checked="" type="checkbox"/>	
1991	Hamburg, Germany	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1989	Nice, France	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1987	Amsterdam, Netherlands	<input checked="" type="checkbox"/>	

Year	Venue	Congress	Exhibition
1985	Lugano, Switzerland	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1983	Firenze, Italy	<input checked="" type="checkbox"/>	
1981	Barcelona, Spain	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1979	Nice, France	<input checked="" type="checkbox"/>	
1977	Brussels, Belgium	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1975	London, UK	<input checked="" type="checkbox"/>	
1973	Montreux, Switzerland	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1971	Amsterdam, Netherlands	<input checked="" type="checkbox"/>	
1969	Nice, France	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1967	Berlin, Germany	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1965	Milan, Italy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1963	Brighton, UK	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1961	Luzern, Switzerland	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1960	Düsseldorf, Germany	<input checked="" type="checkbox"/>	
1959	Paris, France	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

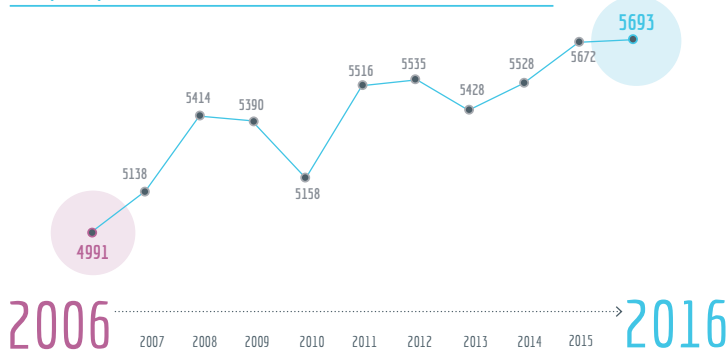
Facts & Figures

Each year, more than 5.5 billion over 15 billion units globally produced, are made in Europe region. The data annually collected among FEA members, focus on giving a detailed summary on European aerosol products production by country, segment and type.

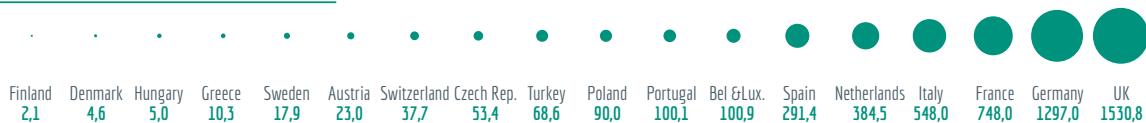
EUROPEAN PRODUCTION

According to reported fillings for European aerosol products, overall unit production reached 5.6 billion in 2016, reflecting a stable situation from 2014 & 2015's production numbers.

European production evolution (2006-2016, in '000 000 units)



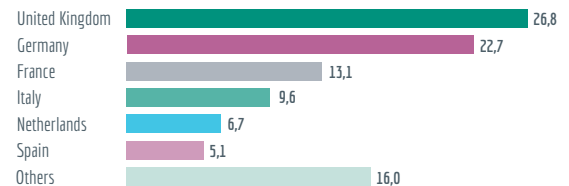
European production (2016, in '000 000 units)



AEROSOL MARKET SHARE

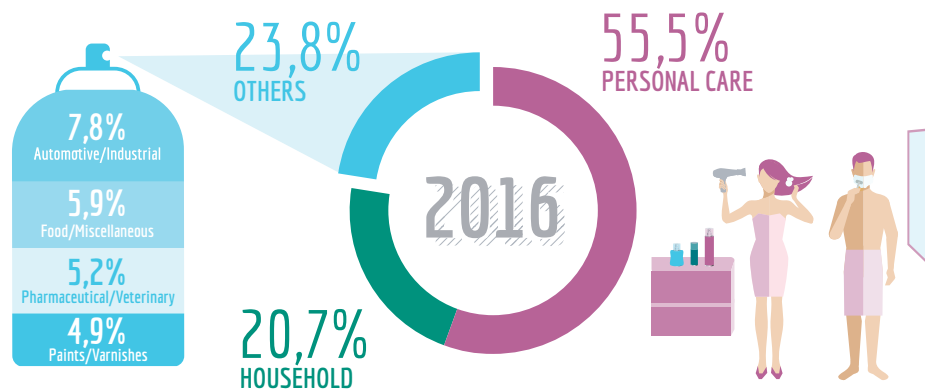
United Kingdom, Germany and France provide more than 60% of the annual aerosol production in Europe in all segments. Together with Italy, Netherlands and Spain, almost 4.7 billion units of aerosol are produced in 2016.

Aerosol market share (% , 2016)



AEROSOL PRODUCTION BY SEGMENT

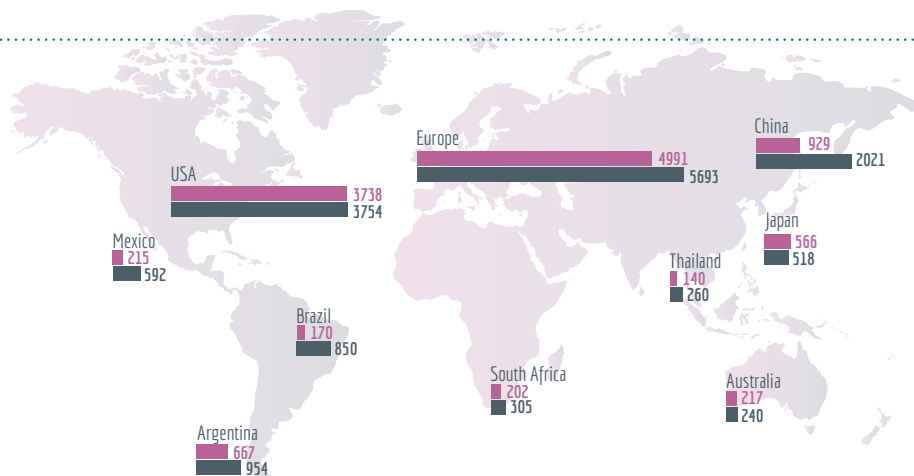
Aerosol containers are primarily made of steel and aluminium whereas glass and plastic containers remain marginal. Cosmetics and household products represent approximately 80% of the European production.



WORLDWIDE PRODUCTION

Evolution by country
(in '000 000 units)

● 2006 ● 2016



The FEA Statistics 2016 can be downloaded free of charge on FEA website : www.aerosol.org

Our Publications

available on www.aerosol.org

FEA 2016 Statistics Report

FEA Standards

Guidelines on Basic Safety Requirements in Aerosol Manufacturing

Guidelines on Basic Safety Requirements in Aerosol Storage

Guidelines on Basic Safety Requirements in Laboratories dealing with Aerosols

Guide on Particle Size Measurement

Guide on Hot Waterbath Testing and its Alternatives

Guide to using LCA

Guide on Inhalation Safety Assessment for Spray Products

Guide on Recycling Post-Consumer Aerosols

English

English - French - German

English

English

English

English

English



















English

English

English



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