



European Aerosol Federation



**ANNUAL REPORT 2018**

*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



## It's nearly time - 2018

"It's nearly time" for the first FEA Global Aerosol Events !

After 22 congresses in different locations over the last 49 years, with the organisational responsibility having been with the local national association, FEA is now taking the lead on its Congress and Exhibition.

The FEA team, with the support of Semico as professional congress organisers, has efficiently and effectively set up the FEA Global Aerosol Events at a location in the heart of Europe. When you read this annual report, I hope you are planning to go to, or will have been to, Düsseldorf and participated in the re-launch of the FEA congress and exhibition.

The aerosol community is gathering to exchange, to learn, and to explore what is new in the world of pressurised dispensing. It will be all about active networking. This will also be true of the International Liaison Committee (ILC) and the FEA Committee meetings that are taking place before and after the event itself.

Aerosols require a high level of expertise as well as experience and therefore we need platforms such as the FEA Congress and Exhibition to generate interaction from all involved from around the globe. It is, therefore, my great pleasure to welcome people from different countries and regions, as well as a wide variety of

DR. ROLF BAYERSDÖRFER

companies, who are contributing in a multitude of ways to the success of the aerosol package.

Aerosols have evolved in to being an every-day product in a huge variety of applications. Over the last 40 years the number of cans produced has more than doubled, despite changes in propellants and intense environmental discussions. We, as an industry, can be proud of what we have achieved because aerosols are recognized as safe to use, easily and widely recycled and unsurpassed in their performance.

The aerosol package thrives on innovation and the willingness to stretch the boundaries, whilst always keeping the consumer and safety in focus. The Aerosol Dispensers Directive is our “industry guide” and is recognised far beyond Europe’s geographical borders as a reliable baseline to work from. The European Commission confirmed this view in its evaluation. This is great news because it underlines, once more, what FEA and the National Associations can achieve when they work in concert.

There were different options under considerations during the evaluation. The cost implications of these could have been in the range of several hundred million euros as well as being very time consuming. Thanks to the responsible and convincing advocacy work carried out, we have helped the industry to remain innovative, to progress in sustainability and towards a positive business development.

It remains FEA’s core purpose to be a true enabler for the industry and our consumers, to drive innovation and the circular economy; supporting this with numerous standards, guides and an active network beyond Europe’s borders.

I would like to conclude with a personal statement. After 9 years in charge of FEA I firmly believe that the industry is in great shape thanks to the extremely high level of competence within the companies involved, national associations and the FEA office.

As I look back I would like to thank all the people who I have crossed paths with at FEA, and within the countries involved in its structures. I can say that I received an almost endless amount of trust and I experienced openness as well as a willingness to move aerosol technology, and the entire industry, forward. However, it is not (only) about the aerosol but is also about the people and here I feel really honoured to have worked, and continue to work, with so many committed and experienced individuals. It is about people and collaboration, and to experience this is amazing. I am very grateful for the time and support I have received during my period in office and I have no doubt that you will all do the same for my successor.

I look forward to seeing you in Düsseldorf and at the events to come.

Yours sincerely

**Dr. Rolf Bayersdörfer**  
FEA President

# May the Force be with you

The adaptation of the Aerosol Dispensers Directive (ADD) 75/324/EEC to increase the allowed maximum internal pressure for aerosols using compressed gas propellants entered into force on 12 February 2018. FEA initiated this proposal in 2001. This opens the door to many technical innovations and potential new product developments.

The EC ADD Working Group in October 2017 concluded from the ADD evaluation that there is no reason to initiate a full revision of the ADD and agreed to keep its policy approach unchanged.

The main outstanding issue is the FEA request to allow an increase in the maximum total capacity for plastic aerosol dispensers, based on a stricter testing regime. FEA initiated a proposal in 2008. The EC ADD Working Group, in October 2017, supported discussing a draft legislative proposal.

Plastic aerosols are not considered single use plastics – they are not designed to be used once, often away from home, and thrown away after a brief use – however, “plastic” has become

a buzzword for the European Commission and for some it is almost forbidden.

“May the Force be with you”, FEA expects that this long-awaited adaptation will proceed without further delay; to foster innovation, enhance competition and create jobs. In the meantime FEA, as a responsible Association, continues to work with Petcore Europe to ensure the safe and effective recycling of plastic aerosols in a circular economy.

I would like to take this opportunity to express my extreme gratitude to Rolf Bayersdörfer for his personal commitment and relentless energy as FEA President since 2009.

Finally, I hope to meet you at the FEA Global Aerosol Events 2018 on 4-5 October 2018 in Düsseldorf, Germany <http://www.feaglobalevents.org/>

**Alain D’haese**  
FEA Secretary General



ALAIN D'HAESE



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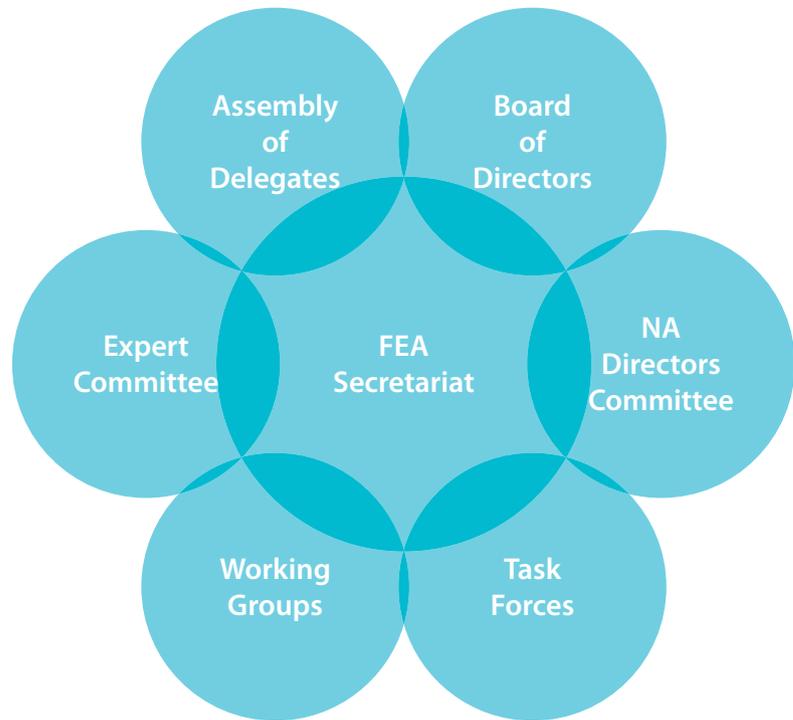
Alain D'Haese  
*FEA SECRETARY GENERAL*



Valérie Boulet  
*FEA COMMUNICATIONS & EVENTS MANAGER*

# Our Structure

**An effective network  
to the benefit of the  
European aerosol  
industry**



# Our Publications

**available on [www.aerosol.org](http://www.aerosol.org)**

FEA 2017 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  
FEA Guide on Transport of Aerosols

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***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.***



PATRICK HESKINS | BAMA (UK)



My first task is to thank Matthias Ibel for so ably chairing the CNAD over recent years. I am delighted to be able to take over the position from him although I know he will be a very tough act to follow.

Through co-ordinated advocacy activity amongst the National Associations, and working with other stakeholders, the CNAD was pleased when the European Commission chose not to revise the Aerosol Dispensers Directive (ADD) following its evaluation exercise. We continue to work together on the adaptation to technical progress for plastic aerosol containers and hope that agreement on the proposed amendments to the ADD will be agreed by the Member States shortly.

The Committee also co-ordinated the national responses to a CLP Q&A suggesting that the propellant should be excluded when calculating the health hazard of aerosols, despite liquefied gas being a functional part of the formulation. Using the input of experts from across the National Associations a paper was prepared and delivered to the CARACAL by the FEA Secretary General, we await to see the outcome.

Collectively the CNAD considers transnational issues which will affect the aerosol industry today and in the future. Amongst the topics discussed by the Committee through 2017 and into 2018 were Brexit, VOC emissions, cross border transit of

aerosols by post, recycling and how best to ensure a sustainable future for the industry and National Associations.

On the last subject, all of the National Associations look forward to welcoming you to the FEA Network Place at the Global Aerosol Event in Dusseldorf. The strength of FEA, apart from the excellent job done by Alain and Valerie, lies in the collective work done by the National Associations, speaking with a single voice to National government on matters of importance to the industry. Please come and join us in Dusseldorf to see how we can continue to work together for the future.

**Patrick Heskins**

CNAD – NA Directors Committee



LAURENCE JOLY | CFA (FRANCE)

***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 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.

**Volker Krampe | Laurence Joly | Adrian McCretton**  
Chairpersons Expert Committee



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



# Global Aerosol Events 2020

## 23 - 24 September | Lisbon, Portugal

FEA Global Aerosol Events connect you with the full supply chain of aerosols worldwide to advance your project from planning through operations. Just walk the show to see, compare and learn about all aspects of the aerosol dispenser industry. Get up to speed on the latest technologies shaping the future of aerosols - and the success of your business!



10000 sqm of trade show



High-level Congress Program



1500 + participants expected

For more information:  
[www.feaglobalevents.org](http://www.feaglobalevents.org)  
32 2 880 04 64  
[fea2020@aerosol.org](mailto:fea2020@aerosol.org)

FIL Feira Internacional de Lisboa | Portugal

# Save the Date

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

## 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"/>	<input type="checkbox"/>
2003	Nice, France	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2001	Maastricht, Netherlands	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1999	Athens, Greece	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1997	Venice, Italy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1995	Glasgow, Scotland	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1993	Seville, Spain	<input checked="" type="checkbox"/>	<input 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"/>	<input type="checkbox"/>

Year	Venue	Congress	Exhibition
1985	Lugano, Switzerland	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1983	Firenze, Italy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1981	Barcelona, Spain	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1979	Nice, France	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1977	Brussels, Belgium	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1975	London, UK	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1973	Montreux, Switzerland	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1971	Amsterdam, Netherlands	<input checked="" type="checkbox"/>	<input 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"/>	<input type="checkbox"/>
1959	Paris, France	<input checked="" type="checkbox"/>	<input type="checkbox"/>

# Facts & Figures

## EUROPEAN PRODUCTION

European production evolution (2007-2017, in '000 000 units)

According to reported fillings for European aerosol products, overall unit production reached a new record high with more than 5.7 billion in 2017, reflecting a continuous growth from 2015 & 2016's production numbers.

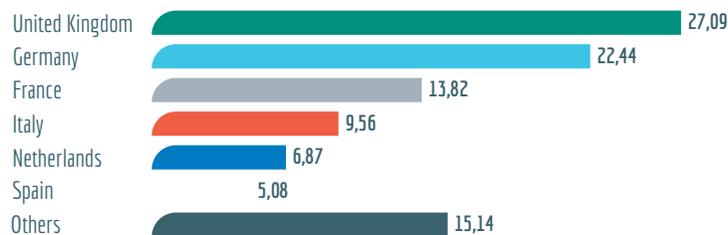


## AEROSOL MARKET SHARE

United Kingdom, Germany and France provide more than 60% of the annual aerosol production in Europe in all segments.

The split is roughly estimated to 55% aluminium cans and 44% steel cans. Glass and plastic cans represent less than 1% of the total production.

Aerosol market share (% , 2017)

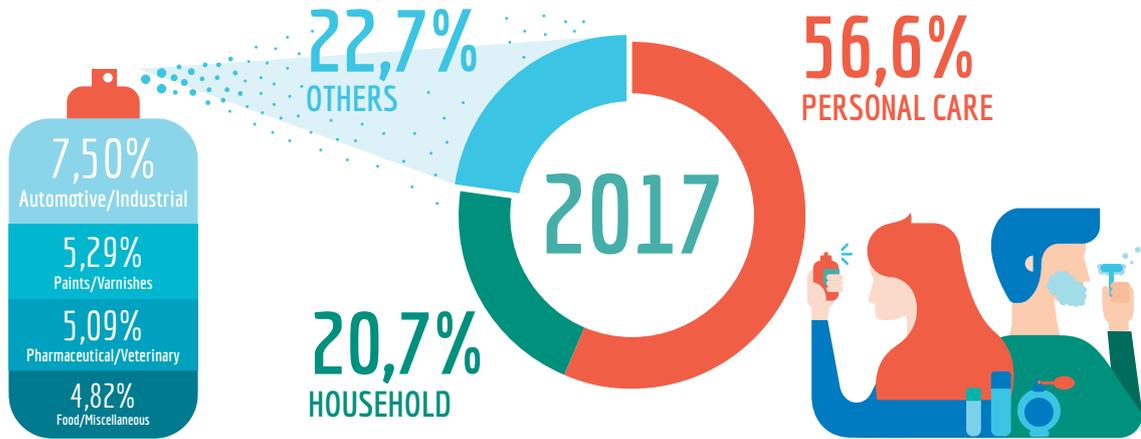


European production 2017 in '000 000 units



## AEROSOL PRODUCTION BY SEGMENT

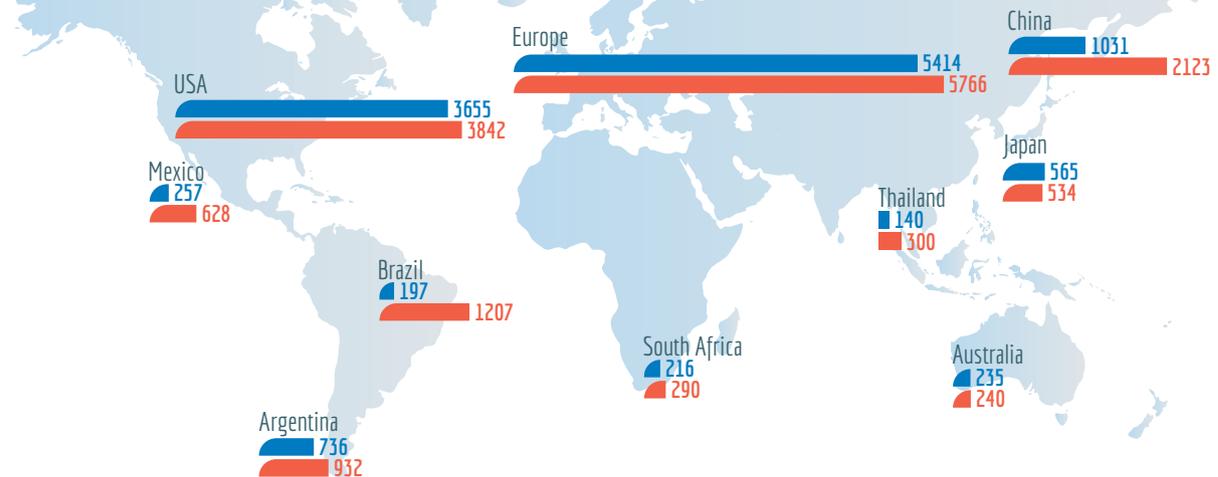
Aerosol containers are primarily made of steel and aluminium whereas glass and plastic containers remain marginal. Cosmetics and household products represent more than three quarter of the European production.



## WORLDWIDE PRODUCTION

Evolution by country (in '000 000 units)

● 2007 ● 2017



The FEA Statistics 2017 can be downloaded free of charge on FEA website : [www.aerosol.org](http://www.aerosol.org)



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