



2022 Annual Report





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Key challenges such as climate change and environmental degradation, remain existential threats to Europe; addressing them should not be delayed. The EU recovery will be accompanied by a green and digital transformation, and EU legislators are - and will be - preoccupied with important legislative proposals from the European Commission related to the EU Green Deal.

URS HAUSER, FEA PRESIDENT

01.

Message from President and Secretary General

Dear FEA member, dear reader,

The end of the tunnel for the Covid 19 pandemic is in sight, despite the remaining variants. Lockdown and the need to wear masks have been lifted in most EU countries. As a result product demand has increased dramatically, but supply has struggled to keep up. The combination of these factors has resulted in high inflation, the likes of which we have not seen in many years.

In addition, Europe has already entered another crisis with the war in Ukraine, which has shaken many things which we took for certain. Apart from the tragic consequences for the Ukrainian population, markets are in upheaval, energy supply is questionable and new dynamics develop. The outcome is far from clear.

These are legitimate goals, but goals that can only be achieved if we have the courage to stay the course and deliver. We are proud to witness a constant, responsible, and sustainable attitude in the aerosol industry.



FEA will continue to promote the values of the European aerosol industry and facilitate the exchange of expertise on policy and industry issues.

In June 2022, the FEA signed an agreement with Easyfairs to support, promote, and exchange expertise in our industry. FEA will combine its strengths with ADF Paris to create a single annual event focused for the aerosol and dispensing supply chain.

The ADF team will be exhibiting at FEAerosol2022 to answer your questions. Such events for a global industry are essential to retain high-level expertise and share our experience, to maintain a thriving aerosol community.

Thank you for your trust in FEA and see you in Lisbon!

*Urs Hauser,
FEA President*

*Alain D'haese,
FEA Secretary General*



FEA has organized the FEA Global Aerosol Events every two years since 1959. The 30th edition will be held on September 21 and 22, 2022 at FIL (Feira Internacional de Lisboa) in Lisbon, Portugal. 'FEAerosol2022' will be the last event in this format. A moment not to be missed. We are counting on the entire aerosol industry to join us to celebrate this success story as we enter a new era.

ALAIN D'HAESE,

FEA SECRETARY GENERAL



5.2 billion
aerosol produced
in Europe (2021)



02.

The Steering Committee

*Volker Krampe,
Chair Of The Steering Committee
Laurent Flond,
Deputy Chair Of The Steering Committee
Adrian McCretton,
Deputy Chair Of The Steering Committee*



VOLKER KRAMPE,

CHAIR OF THE STEERING COMMITTEE

Due to the Covid-19 pandemic, the Steering Committee only worked remotely which has been challenging, but the Committee succeeded to remain efficient and effective.

Chairs of Working Groups and Task Forces submit pre-reads prior to the virtual meetings, which facilitate discussion and approvals. We thank them for their commitment and efforts.

I am delighted to present, with the support of Adrian and Laurent, the key topics that the Steering Committee dealt with throughout 2021/22.



Concerning the FEA groups, the Committee

- **Established a new Compartmented Technologies Task Force** which has the task to draft a FEA Guide on compartmented technologies.
- **Converted the VOC Working Group** into an Emissions Working Group.
- **Disbanded the Health Classification Task Force and the Waterbath Test Alternatives TF** which accomplished their tasks.



Please note that by September 2022, all FEA groups will elect or re-elect their respective Chair and vice-Chair.



Concerning **trade of aerosol dispensers with the United Kingdom of Great Britain and Northern Ireland (UK)**, the Committee agreed on the updated the briefing paper on dual labelling of reversed epsilon and UKCA marking following the publication of new legislative texts in the UK.



The Committee adopted a position paper on the European Commission's proposal on **fluorinated greenhouse gases**, asking legal certainty on the existing restriction related to technical aerosols and the new restriction on personal care products, and challenging the



extension of labelling requirements to substances with very low Global Warming Potential.



To further support the industry in reducing its carbon impact, the Committee asked to the Emissions Working Group for drafting a new briefing paper on the **different pathways to reduce the carbon footprint of aerosol products**.

- On recycling, the Committee adopted an updated **FEA position paper on post-consumer aerosol recycling**. FEA also contributed to questions from EC consultant Eunomia in the frame of a new proposal to revise the EU Packaging & Packaging Waste Directive.
- On reuse, the Committee agreed on a new briefing paper on **Aerosols Dispensers & Reuse** as well as a revised **FEA Guide to using Life Cycle Analysis (LCA)**. Further discussion on the safety aspects of refillable pressurised dispensers is on-going.

➤ The Standardisation Working Group revised the following standards

- **FEA 100 Standardisation** – Basic terms, principles, procedure,
- **FEA 223 Tinplate aerosol containers** – Plastic cover caps for two and three piece necked-in containers conforming with FEA 214,
- **FEA 641 Aerosol gaskets** – Test for material selection and
- **FEA 642 Aerosol Gaskets** – Olfactive control test.

The International Liaison Committee (ILC) discusses a new Guideline on stability testing, based on standard FEA 603.

- On industrial safety, the Committee adopted a revised **FEA Guidelines on the Basic Safety Requirements in Aerosol Manufacturing**.
- On the transport of aerosols, the International Civil Aviation Organization (ICAO) Dangerous Goods Panel (DGP) discussed and agreed on the **harmonisation of the ICAO dangerous goods provisions for aerosols with the UN Model Regulations**. The RID/ADR/ADN requirements relating to the increase of the allowed maximum internal pressure at 50°C to 15 Bar for aerosols using compressed gas propellants will be fully aligned to the UN Model Regulations. In the case of a mixture of propellant gases, the stricter requirement will apply.





FEA and Downstream Users of Chemicals Co-ordination Group (DUCC)



FEA continues to be involved in the Downstream Users of Chemicals Co-ordination Group (DUCC) which contributes to issues relating to the EU Chemicals Strategy for Sustainability.

- hazard-based Generic Risk management Approach (GRA),
- Mixture Assessment Factor (MAF),
- One Substance One Assessment,
- CLP additional hazards such as Endocrine Disruptors (ED) and Persistent, Mobile and Toxic (PMT) substances,
- Safe and Sustainable by Design (SSbD),
- speeding up REACH processes,
- digitalisation.

DUCC also supports the implementation of EU REACH and EU CLP.



In the scope of the Safe and Sustainable by Design chemicals and materials (SSbD), FEA positively contributed to the definition of criteria and evaluation procedure for chemicals and materials proposed by the **Joint Research Centre (JRC) of the European Commission**.

Finally, we would like to thank the co-operative Committee members for their fruitful discussions, input, and decisions, based on deep expertise from all working groups and task forces. We also want to thank the Board of Directors for their trust and support and the FEA secretariat for their excellent work.

Companies are also 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.

We take this opportunity to additionally invite you all to attend the next **FEA Global Aerosol Events on 21 and 22 September 2022 in Lisbon, Portugal**. The event is a fantastic opportunity for the global aerosol community to network with peers and update one another on the latest developments in our industry.

I am eager to meet you again in-person soon!



03.

The Committee of National Association Directors (CNAD)



JEAN BLOTTIÈRE,
CHAIR OF THE CNAD

Did I say 2020 was an exceptional year? Well, 2021 was pretty much the same as far as the CNAD was concerned! Once again, we weren't able to meet in person and we had to experience the additional burden of only being able to see one another on a laptop or computer screen. Our priorities were to maintain awareness, to make sure that our colleagues, families, and friends were safe, and to start planning what could be done as soon as restrictions were lifted.

Each National Association has been able to resume meetings with their members and even celebrate the return of some face-to-face events.

One of our main tasks was to look after our existing members and support them in these challenging times. In addition to this, we worked towards getting more new members on-board to increase our representation, expertise and financial sustainability.

Due to on-going streamlining of staff at many of our members, we have witnessed a decrease in both technical and regulatory expertise, and experience. This is an area in which National Associations are strong and we continue to further develop this "raison d'être"!



We are delighted to support all our members and potential members in answering an increasing number of questions. We also provided additional support to our sister associations covering cosmetic, household, technical, medical or food products.

The COVID-19 pandemic continued to impact business. Internally, teleconferencing became the norm. Externally, consumers have changed their ways to consume, with more e-commerce and a demand for innovative packaging with lower environmental impact. Our members faced those changes and have had to adapt.

The CNAD forwarded to members the guides and briefing papers issued by FEA providing in addition appropriate explanations.

➤ The Committee carried on its coordinated advocacy activities related to **the health classification of aerosols under CLP, standardisation (CEN), transport of aerosols and the impact of Brexit on our business**. For example, dual reversed epsilon and UKCA labelling, and the alternatives to hot water bath testing for both the EU and the UK.

➤ The CNAD representatives worked closely together to understand relevant issues in other countries and to help each other. **Data collection related to the production statistics remains laborious in certain countries**. The recycling of aerosols is far from being harmonized in Europe.

Additionally, certain national regulations related to packaging creates hurdles in the EU Single Market.



The Committee improved the **FEA information flow** in terms of content and frequency.



Finally, the **CNAD promoted the virtual FEAerosol2021 as well as the in-person FEAerosol2022 in Lisbon**.



Taking about FEA events, the CNAD unanimously welcomes and supports the new partnership between FEA and Easyfairs which capitalizes on each organisation knowledge and resources.

I must say thank you to all my colleagues on the CNAD! No matter the size of their association, we all have been impacted by the global crisis and have kept the boat sailing in the right direction...running daily operations, looking after membership, interacting with boards, maintaining financially sound associations... all this while juggling with national and European issues.

2022 has started and we already have seen opportunities to resume a normal life.

ADF Paris was the first event were we could meet up again. FEAerosol2022 in Lisbon (21-22 September 2022) is the next one and I am very keen to see the whole aerosol family!



04.

FEA Global Aerosol Events



VALÉRIE BOULET,
COMMUNICATIONS & EVENTS
MANAGER FEA



Leading international aerosol federation FEA will combine its long-standing biennial Global Aerosol Events with ADF in Paris

From January 2023, the event will be combined with ADF in Paris to create a single annual event fo-cused on the aerosol and dispensing supply chain.

FEA will play a crucial role in developing the conference programme for the event as well as marketing the exhibition to visitors and potential exhibitors through its extensive global network. FEA and ADF will also collaborate on the future development of their respective awards programmes.

Thanks to this partnership with ADF and Easyfairs FEA have the opportunity to offer the aerosol community an annual event where they can network and discuss the latest trends in a wider business environment.



ADF Easyfairs and FEA share a mission to develop and drive innovation in the global aerosol market and will be more effective in fulfilling this mission by working together and sharing expertise and re-sources.

The FEA Global Aerosol Events has a wonderful heritage and will combine its best elements with the best elements of ADF to create a truly world-class event for the aerosol and dispensing market.



The last edition, which is the 30th edition of FEA exhibition and conference is held on the 21 and 22 of September 2022 at the FIL (Feira Internacional de Lisboa) in Lisbon, Portugal : a perfect moment and destination to celebrate this partnership with the worldwide aerosol community.

ADF launched in 2007 and is part of Paris Packaging Week, which attracts more than 600 exhibitors and 10,000 participants each year.

Paris Packaging Week also includes the events PCD, the world's leading innovation event for perfume and cosmetics packaging, and PLD, the leading event for design and innovation in premium and luxury drinks packaging. **From its January 2023 edition, Paris Packaging Week will also host an edition of Packaging Première, the luxury packaging event aimed at the fine food, fashion and accessories markets.**



It is a great honour for us to be working with the FEA and we look forward to a long and successful partnership. We share a mission to develop and drive innovation in the global aerosol market and we will be more effective in fulfilling this mission by working together and sharing our expertise and resources. The FEA Global Aerosol Events has a wonderful heritage and we are looking forward to combining its best elements with the best elements of ADF to create a truly world-class event for the aerosol and dispensing market.

MATT BENYON,

CEO EASYFAIRS UK & GLOBAL





05.

Facts and Figures



European production

According to reported fillings for European aerosol products, overall unit production remains stable at **5.2 billion in 202**.

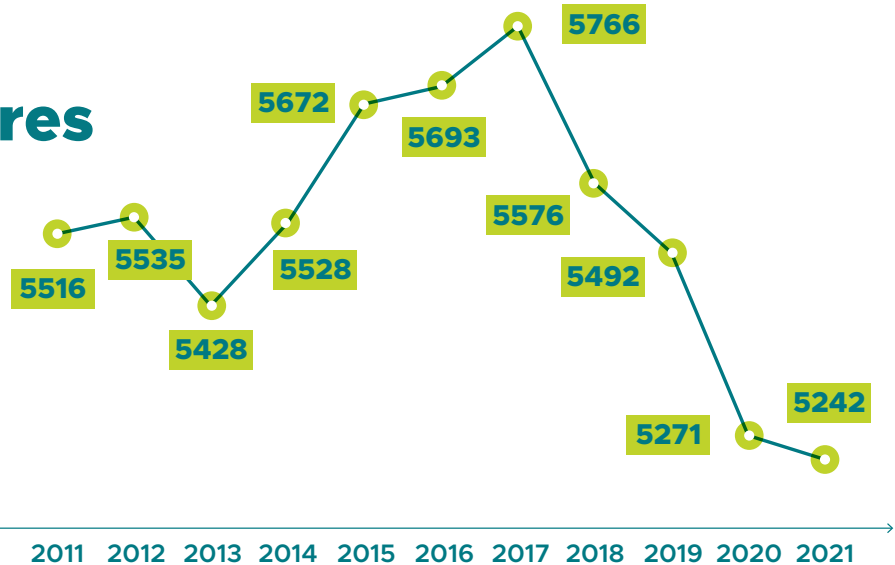


Fig.1. European production evolution (2010-2021, in '000 000 units)



European market share

United Kingdom, Germany and France provide more than 55% of the annual aerosol production in Europe in all segments. Together with Italy, Netherlands and Spain, more than 4.0 billion units of aerosol dispensers are produced in 2021.

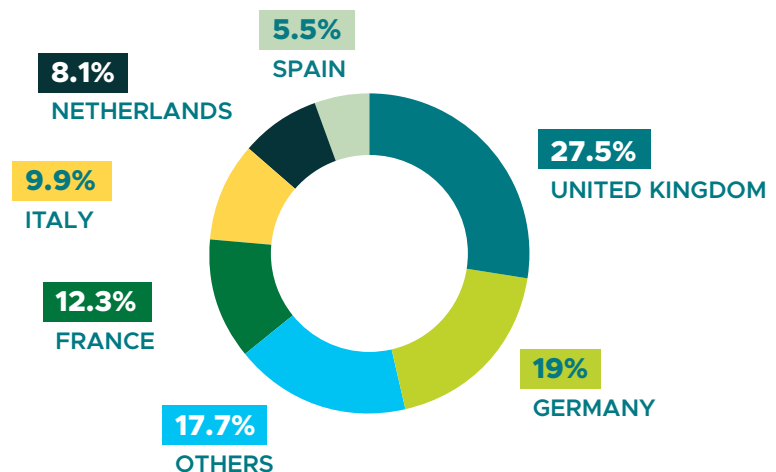
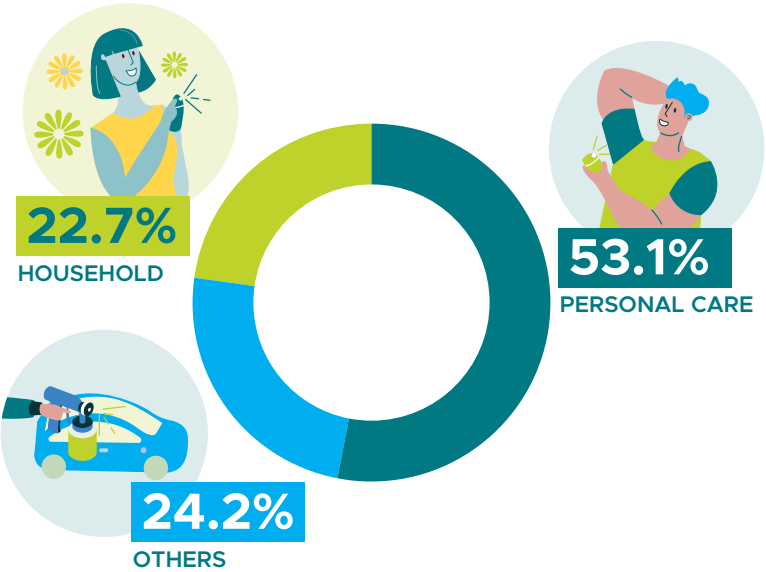


Fig.2. Aerosol market share (2021)



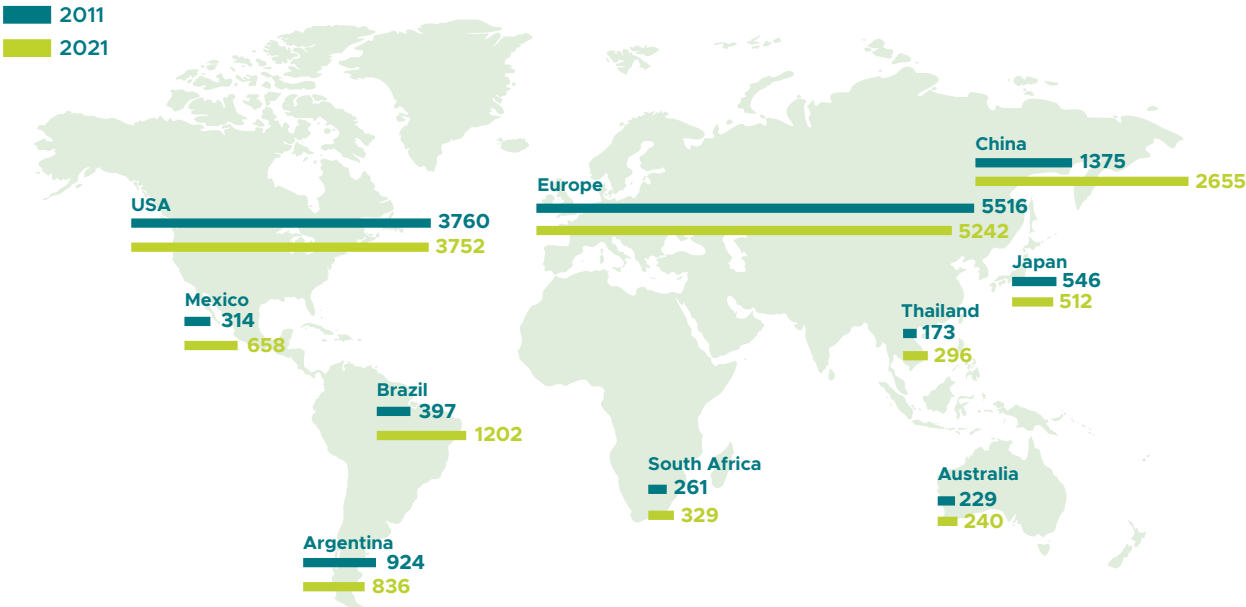
European production by segment

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

Fig.3. Worldwide production by country (in '000 000 units)





06.

Board of Directors and Secretariat



URS HAUSER

ASA / Switzerland
President



JEAN-MARIE POPPE

DETIC / Belgium
Vice-President & Treasurer



FEDERICO BISIO

CFA / France
Vice-President
(January 2022)



VOLKER KRAMPE

IGA / Germany
Steering Committee Chair



ADRIAN MCCRETTON

BAMA / UK
Steering Committee
Deputy Chair



LAURENT FLOND

CFA / France
Steering Committee
Deputy Chair



MURDOCH CRAWFORD

BAMA / UK



THOMAS DÖRING

IGA / Germany



ASIER SANTOS

AEDA / Spain



FRANCESCO MAESTRI

AIA / Italy



JOSÉE WULLINGS

NAV / The Netherlands



ÖZGÜR ÖZTÜRK

ASAD / Turkey



JEAN BLOTTIÈRE

CFA / France
CNAD Committee Chair

FEA SECRETARIAT



ALAIN D'HAESE

Secretary General



VALÉRIE BOULET

Communications &
Events Manager



07.

Governance and structure



An effective network to the benefit of the European aerosol industry





08.

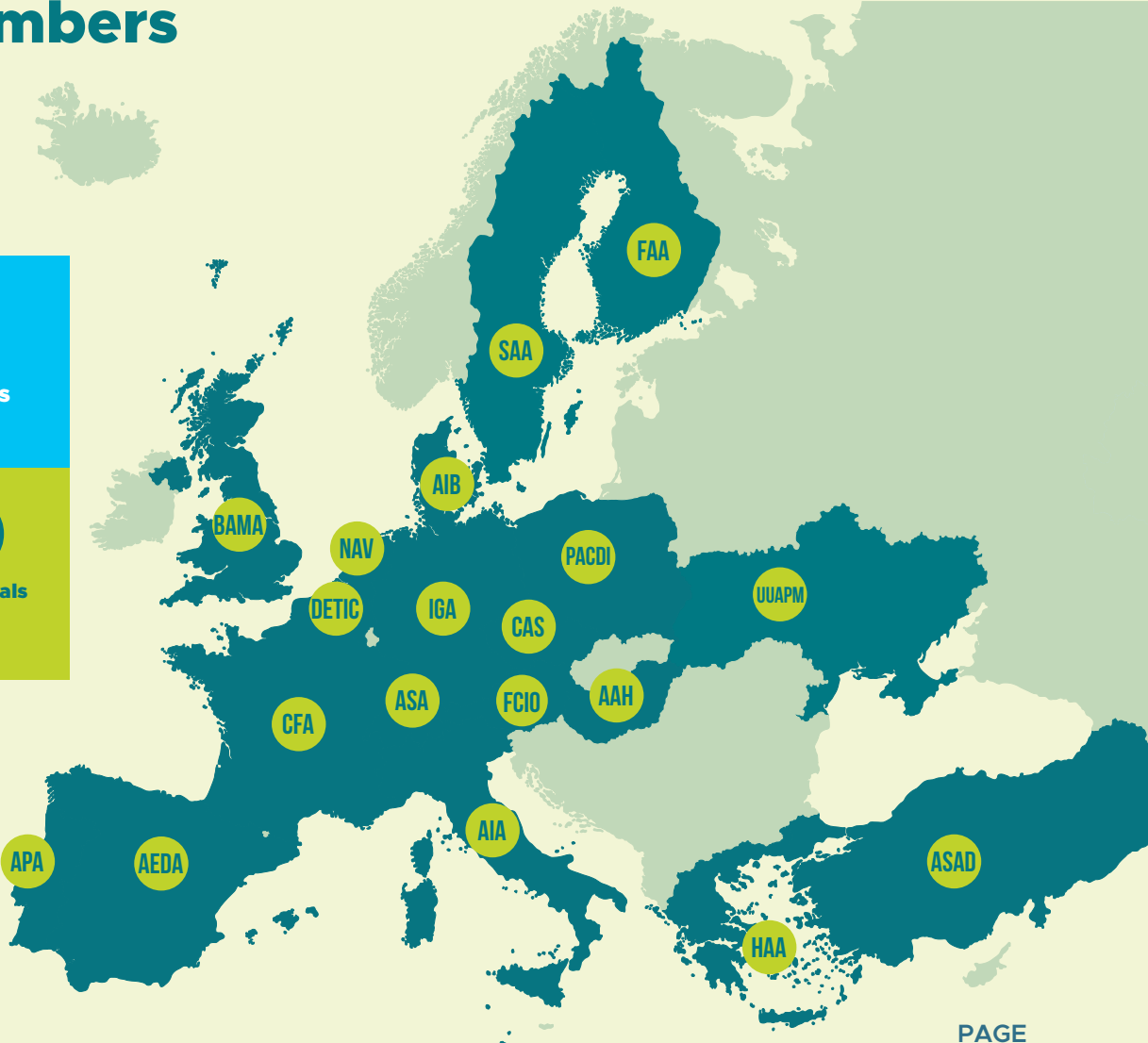
Our Members

19

European countries
which include

+350

SMEs and multinationals
active in the aerosol
industry





Europe

Austria

FCIO - Fachverband Der Chemischen Industrie Österreichs
fcio.at

Belgium

DETIC - Association belgo-luxembourgeoise des producteurs et des distributeurs de cosmétiques, détergents, produits d'entretien, colles et mastics, biocides et aérosols
secretariat-detic@detic.be / be-aerosols.be

Czech Republic

CAS - Ceske Aerosolo Ve Sdruzeni
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Denmark

AIB - Aerosol Industries Brancheforening

Finland

FAA - Finnish Aerosol Association

France

CFA - Comité Français Des Aerosols
rtemani@cfa-aerosol.com / cfa-aerosol.com

Germany

IGA - Industrie-Gemeinschaft Aerosole e.V.
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Greece

HAA - Hellenic Aerosol Association
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Italy

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Netherland

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Portugal

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Spain

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Sweden

SAA - Swedish Aerosol Association

Switzerland

ASA - Association Suisse De Aerosol
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Turkey

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Ukraine

UUAPM - Ukrainian Union of Aerosol Products Manufacturers
uuapm2020@gmail.com

United Kingdom

BAMA - British Aerosol Manufacturers Association
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Worldwide

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Australia

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Brazil

ABAS - Associacao Brasileira De Aerossois
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China

CPF - China Packaging Federation
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Chile

CCA - Camara Chilena Del Aerosol
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Mexico

IMAAC - Instituto Mexicano del Aerosol A.C.
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Russia

RAF - Russian Aerosol Federation

USA

HCPA - The Household and Commercial Products Association
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Venezuela

CAVEA - Camara Venezolana De Aerosoles
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