

'Aerosol Today Worldwide'

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Introduction: The Asian Aerosol Federation

- Founded in November 2011
- Comprises national aerosol associations from Australia, China, India, Japan, New Zealand and Thailand
- Japan = President; Thailand = Vice-President, Australia = Secretariat



Disclaimer

- Impacts of COVID-19 not unique to aerosol sector and reflect challenges in many manufacturing, retail and distribution sectors
- Some generalisations inevitable

2021 In Review

- Slight recovery in total fillings from 2020 (e.g. Japan: Up 1.3%, Thailand: Up 3.8%)
- Not consistent across categories or countries (e.g. China saw decline of 2.2% (60 million units), the first time fillings have declined in that country!)
- Personal Care remains depressed in many countries, reflecting impact of changes in demand in both local and export markets
- 2020's major upswing in fillings of cleaners, disinfectants and sanitisers has settled back down
- Household/Industrial/DIY sector remains strong due to lock-downs and less travel

2022: Some Observations

- Recovery continues but demand still depressed, especially in Personal Care
- While most of world returns towards some form of 'living with COVID', China reports that fillings were down 30% in first ¼ of 2022
- Some of the vaunted return to local manufacture due to supply chain concerns is taking time to translate into actual sales
- Production has moved back to countries where manufacturing was disrupted by local shutdowns (e.g. Thailand and Australia have seen production shift back to Malaysia)

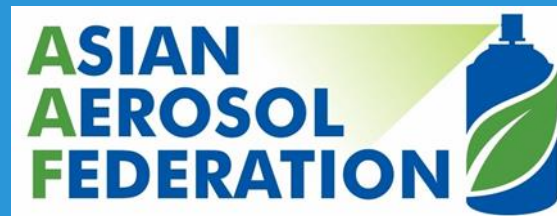
2022: Some Observations (cont'd)

- All categories are being impacted by extreme pressure on input costs
- Exacerbated by political and economic uncertainty in Europe
- Pressure on labour markets and wage costs from disruption to immigration flows and on-going challenges from COVID (e.g. in March 2022 Australian employers were reporting absenteeism up 33% due to COVID)
- With the pressure on prices, there is intense competition: fillers and others bound by fixed price contracts are 'sandwiched' in the middle

Concluding Remarks

- Seen a return to physical events and towards normalcy re Association activities
- Challenges still remain:
 - Safe recycling / disposal of aerosols (Australia / NZ, Thailand, Japan)
 - Pressure on propellant choices (e.g. Synthetic Greenhouse Gases / f-gases) and search for alternatives
 - Continued tightening of controls and restrictions on chemical sector and 'hazardous' industries in storage and logistics (China, Thailand)

Thank You !



www.aerosol-asia.org