Contents

01. Message from President and Secretary General
02. Steering FEA in 2023
03. The Committee of National Association Directors (CNAD)
04. FEA Networking: a world of opportunities
05. Facts and figures
06. Board of Directors and Secretariat
07. Governance and structure
08. Membership
Dear Esteemed FEA Member, dear friends,

While we emerge from the shadow of the COVID-19 pandemic, we acknowledge that the impact still casts a palpable presence in our industry. Inflation may have peaked, and certain supply chains are struggling due to the war in Ukraine. Nevertheless, there are silver linings on the horizon.

A renewed consumer demand for cosmetic aerosol dispensers is noticeable, with a gradual easing of inflation and steady normalisation of supply chains. However, positive trends come with their challenges, most notably a cluster of legislative proposals under scrutiny at the EU level. With the upcoming 2024 European elections, debates within the European Parliament could intensify, potentially leading to heavy compromises with considerable resource implications.

Nevertheless, remember that every cloud has a silver lining. The increasing demand for cosmetic aerosol dispensers reflects the long-lasting acceptance of aerosols. Despite the potential hurdles of meeting ever-tightening regulations and environmental standards, these challenges provide us with opportunities to innovate and become even more resilient.

In difficult times, no single entity can effectively overcome obstacles in isolation. Now, more than ever, it is crucial that we come together and leverage our collective insights and expertise to navigate these storms. Unity, after all, is our greatest strength.

Your contribution, through shared experiences and knowledge, will guide our industry’s path forward. We firmly believe in your expertise investment as the stepping stone towards a vibrant aerosol future.

Thank you for entrusting us with this journey forward. Your belief in the FEA fuels our commitment and determination.
The Steering Committee made stable decisions throughout 2022/23, ensuring that relevant technical issues were accordingly discussed and handled. This report gives a summary of the main priorities which the Steering Committee managed.

In September 2022, the Steering Committee re-elected for two years Volker KRAMPE (IGA) as Chair and Laurent FLOND (CFA) and Adrian McCRETTON (BAMA) as Deputy Chairs.

The role of the Steering Committee and the way it works evolved further. Working Groups (WGs) and Task Forces (TFs) Chairs submit pre-reads before Committee meetings. The Committee reviews all terms of reference and ratifies the outcome of elections in WGs and TFs. The Committee approves a list of priorities with task allocations. It is foreseen that an additional exhaustive priority list will be considered, and CNAD will develop it.

Despite the support of the EC ADD Working Group, in October 2017, less progress was made with the European Commission to initiate the legislative process for an adaptation to technical progress (ATP) of the Aerosol Dispensers Directive (ADD) 75/324/EEC, towards the increase of the maximum total capacity of plastic aerosol dispensers meeting the requirements of appropriate testing.

In March 2023, FEA launched its Code of Practice for PET Aerosol Dispenser Recyclability in the EU. This initiative intends to demonstrate transparently the transition of the aerosol industry to fully recyclable plastic aerosol dispensers. The dialogue with the European Commission remains open.
The General Product Safety Regulation (EU) 2023/988 (GPSR) has been published in the Official Journal of the EU. For aerosol dispensers, this Regulation applies only to those aspects and risks or categories of risks that are not covered by the Aerosol Dispensers Directive 75/324/EEC. The definition of a safe product does not include the word ‘misuse’ as advocated by FEA.

The Steering Committee approved a new FEA Guide on compartmented technologies. This guide aims to provide essential quality and safety recommendations for aerosol dispensers using compartmented technologies aligned with current and in anticipation of European legislation. It provides general descriptions and offers suggestions but cannot exhaustively cover the numerous specific designs that exist or will appear on the market.

The Steering Committee also approved a briefing paper on refillable pressurised dispensers. These products may not be defined as aerosol dispensers and do not fall under the Aerosol Dispensers Directive 75/324/EEC scope. This briefing paper intends to provide essential advice for the safe and legal re-filling / re-charging, transport and placing of refillable pressurised dispensers on the market. The substantial variety of possible technologies and marketing models and their combinations demonstrate the need for a case-by-case approach.

In revising the Packaging & Packaging Waste Directive (PPWD) 94/62/EC, FEA advocates that all aerosol dispensers – independently of the container material – should be covered by the same legal provisions.

Even if they represent less than 1% of the aerosol market, the same provisions should cover glass and plastic aerosols.

The UN Sub-Committee of Experts on the Transport of Dangerous Goods expressed the will to align some requirements between Aerosols and Chemicals under pressure. FEA proactively sent an informal paper to align special provision 63 of the UN Model Regulations with the text of special provision 362.

FEA also participated in discussions concerning the differentiation between UN 1950 Aerosols and UN 2037 Receptacles, small, containing gas (gas cartridges), led by the German authorities. The initial proposal would have led to a significant impact on the aerosol industry in transferring many product categories into UN 2037.
In the **UN Joint Meeting of the RID Committee of Experts and the Working Party on the Transport of Dangerous Goods**, a proposal to exempt local deliveries of small amounts of end consumer products from the application of the dangerous goods regulations is still under discussion.

The new prohibition proposed by the European Parliament will disrupt the placing on the market of essential technical aerosols that need to remain non-flammable, such as aerosol dispensers for the disinfection of aircraft to prevent the spread of illnesses like malaria, zika or chikungunya in the EU; or aerosol dispensers for testing fire detectors which alert people in case of fire at home, office, in hotels or restaurants. FEA advocated an amended wording to adopt an efficient but workable prohibition.

Concerning the **Fluorinated Greenhouse Gases (F-gases) Regulation**, the aerosol dispenser industry already substituted HFC-134a (non-flammable liquefied gas, GWP 1430) with HFO-1234ze (non-flammable liquefied gas, GWP 1.37). The HFO-1234ze is the sole remaining non-flammable liquefied propellant gas to formulate non-flammable technical aerosols necessary for safety reasons.

The FEA and DUCC contributed to issues related to the **EU Chemicals Strategy for Sustainability**:  
- Hazard-based Generic Risk management Approach (GRA),  
- Mixture Assessment Factor (MAF),  
- One Substance One Assessment,  
- Safe and Sustainable by Design (SSbD),  
- speeding up REACH processes,  
- digitalisation,  
- revision of the Classification, Labelling and Packaging (CLP) Regulation.

**FEA continued to be involved in the Downstream Users of Chemicals Co-ordination Group (DUCC)**

FEA and DUCC contributed to issues related to the EU Chemicals Strategy for Sustainability:

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- Mixture Assessment Factor (MAF),
- One Substance One Assessment,
- Safe and Sustainable by Design (SSbD),
- speeding up REACH processes,
- digitalisation,
- revision of the Classification, Labelling and Packaging (CLP) Regulation.

DUCC also supports the **implementation of EU REACH and EU CLP**. A Delegated Regulation amending the CLP Regulation to include the new hazard classes has been published in the Official Journal of the European Union: Endocrine disruptor (human health), Endocrine disruptor (environment), Persistent, Bioaccumulative and Toxic (PBT) or Very Persistent, Very Bioaccumulative (vPvB), Persistent, Mobile and Toxic (PMT) or Very Persistent, Very Mobile (vPvM). New mixtures shall be classified and labelled from 1 May 2026.

Concerning the public consultation from ECHA on the future restriction of PFAS, **FEA provided input to defend the use of HFO-1234ze for aerosol dispensers that must be non-flammable for safety reasons**. The HFO-1234ze is not persistent like common PFAS. Its atmospheric lifetime is only 19 days. The quantities used by the aerosol dispenser industry are low. The Trifluoroacetic acid (TFA) yield is estimated at only 2%. Certain technical aerosols have no alternative to using HFO-1234ze to guarantee non-flammability while maintaining product performance.
Concerning the UN GHS, FEA continued participating in relevant correspondence working groups.

FEA also monitored the development of other legislative proposals such as the EU Ambient Air Quality Directive (AAQD), the EU Eco-design Sustainable Products Regulation (ESPR), the EU Seveso III Directive, the EU Green Claims Directive, the EU Product Liability Directive, the EU Sustainable Finance, the EU Corporate Sustainability Due Diligence Directive, the EU Protection of the environment through criminal law, and the EU Critical Raw Materials Regulation.

The revised Machinery Regulation has been published in the OJEU and will apply from January 2027.

The Deforestation-free Products Regulation has been published in the OJEU and will apply from December 2024 - June 2025 for micro-undertakings or small undertakings.

This is a very challenging period due to numerous legislative proposals under discussion. Additionally, tensions within the European Parliament and between the Council and the European Parliament will increase with the upcoming 2024 European elections, which could result in hard compromises that might not be realistic for the industry.

The aerosol format remains popular with consumers. The constant development of products that meet consumers’ expectations against increasingly stringent regulations and environmental standards presents challenges and opportunities.

The aerosol dispenser industry should continue to use its knowledge and expertise to meet all these challenges.

Finally, we thank the supportive 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 its excellent work.

Companies are also vital in allowing their experts to share their insights and knowledge for leading the whole aerosol industry. We remain thoroughly convinced that this is a sound investment into the future of aerosols.
03. The Committee of National Association Directors (CNAD)

Our main objective was to deliver exemplary service to members and support them by providing insights and implementing actions through FEA’s various Working Groups (WGs) and Task Forces (TFs). In a challenging economic environment, each National Association Director had to find the right balance between new and existing members towards financial sustainability.

2022 saw a return to normality in terms of meeting in person again. CNAD had the opportunity to meet in Lisbon last September and enjoy the conviviality of such events.

The Committee continued to coordinate advocacy activities related to a future adaptation of the Aerosol Dispensers Directive 75/324/EEC (plastic aerosols), health classification of aerosols under CLP, standardisation (CEN), and transport of aerosols. Recycling aerosols was a prominent subject due to revising the Packaging & Packaging Waste Directive (PPWD), which should become a Regulation. CNAD insight view of specific national issues has been vital for FEA to raise its concerns and opinions at the EU level. Additionally, fellow Directors advocated FEA positions at the national authority level.

The Committee devised a solution to support the collection of the sector’s yearly European statistics, which was successfully implemented in 2023.
All the activities and initiatives of last year were only possible with all my colleagues’ full approval and commitment! I want to thank them all for their continuous support.

CNAD also initiated training on competition law for all FEA members and participants in various Committees, WGs and TFs. This was particularly important due to liability changes.

The committee fostered the promotion of the FEAerosol2022 in Lisbon and the ADF 2022 and 2023, in line with the agreement signed between FEA and Easyfairs.

Finally, CNAD initiated a joint CNAD / BoD meeting in January 2023 in Paris to cover significant points related to ways of working, communication, and raising awareness of national priorities impacting the aerosol business. The meeting outcome supported FEA to move forward and endorsed the excellent work done by the Brussels Secretariat.
Late January 2023, FEA in partnership with ADF Paris, part of Paris Packaging Week, shared the mission to run the world’s only annual packaging innovation event dedicated to aerosols and dispensing technology.

This was a resounding success, with some 2,500 visitors and 100 exhibitors, over 20 hours of inspiring conference programme and the announcement of the winners of the ADF Innovation Awards closed with a cocktail offered on the FEA lounge, the perfect meeting place to reconnect with the aerosol community.

Next ADF Paris event will take place on 17 and 18 January 2024 and the Federation is actively participating in its content and growth

- The Global Aerosol Dispenser Summit led by an experienced moderator, with focus on key technical, sustainability and regulatory challenges for the market
- A competition for start-ups with services and/or products linked to the aerosol dispenser industry
- Alain D’haese, FEA Secretary General is appointed Chairman of the 2024 ADF Innovation Awards Jury and an FEA Award called FEA Aerosol Technology of the Year will open to entries
According to reported fillings for European aerosol products, overall unit production remained stable at 5.3 billion in 2022.

Fig.1 European production evolution (2012–2022, in ’000 000 units)
The 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 2022.

**Production by country**

- United Kingdom: 19.5%
- Germany: 18.3%
- France: 12.2%
- Italy: 10.0%
- Netherlands: 7.6%
- Spain: 5.4%
- Others: 27.0%

**European production (2022, main countries, in ‘000 000 units)**

- United Kingdom: 1436,0
- Germany: 971,0
- France: 650,0
- Italy: 533,7
- Netherlands: 404,4
- Spain: 287,0
- Belgium: 272,4
- Türkiye: 133,5
- Poland: 61,6
- Czechia: 41,0

Fig.2 Aerosol production by country (2022)

Fig.3 European production (2022, main countries, in ‘000 000 units)
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

(in ‘000 000 units)  

*Based on the data currently available. No data is available for 2022.

*Based on the data currently available. No data is available for 2022.
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

Murdoch Crawford
BAMA / UK

Francesco Maestri
AIA / Italy

Özgür Öztürk
ASAD / Türkiye

Asier Santos
AEDA / Spain

Josée Wullings
NAV / The Netherlands

Volker Krampe
IQA / Germany
Chair of the Steering Committee

Adrian McCretton
BAMA / UK
Steering Committee
Deputy Chair

Laurent Flond
CFA / France
Steering Committee
Deputy Chair

Jean Blottière
CFA / France
Chair of the CNAD

FEA Secretariat

Alain D’haese
FEA Secretary General

Valérie Boulet
FEA Communications & Events Manager
07. Governance and structure

An effective network to the benefit of the European aerosol industry

- General Assembly (GA)
- Board of Directors (BoD)
- Steering Committee
- Task Forces (TFs)
- Working Groups (WGs)
- Committee of National Association Directors (CNAD)
08. Membership

FEA represents 18 European countries which include +350 small and medium-sized enterprises (SMEs) and multinationals active in the aerosol dispenser industry.
# Europe

## Austria
**FCIO - Fachverband Der Chemischen Industrie Österreichs**
- [fcio.at](http://fcio.at)

## Belgium
**DETIC - Association belgo-luxembourgeoise des producteurs et des distributeurs de cosmétiques, détergents, produits d’entretien, colles et mastics, biocides et aérosols**
- [be-aerosols.be](http://be-aerosols.be)
- [secretariat-detic@detic.be](mailto:secretariat-detic@detic.be)

## Czechia
**CAS – Ceske Aerosolo Ve Sdruzeni**
- [cz-aerosol.cz](http://cz-aerosol.cz)
- [info@cz-aerosol.cz](mailto:info@cz-aerosol.cz)

## Denmark
**AIB – Aerosol Industries Brancheforening**

## Finland
**FAA – Finnish Aerosol Association**

## France
**CFA – Comité Français Des Aerosols**
- [cfa-aerosol.com](http://cfa-aerosol.com)
- [rtemani@cfa-aerosol.com](mailto:rtemani@cfa-aerosol.com)

## Germany
**IGA – Industrie-Gemeinschaft Aerosole e.V.**
- [aerosolverband.de](http://aerosolverband.de)
- [info@aerosolverband.de](mailto:info@aerosolverband.de)

## Greece
**HAA – Hellenic Aerosol Association**
- [haa.gr](http://haa.gr)
- [haaent@otenet.gr](mailto:haaent@otenet.gr)

## Hungary
**AAH – Aerosol Association Of Hungary**
- [csaosz@csaosz.hu](mailto:csaosz@csaosz.hu)

## Italy
**AIA – Associazione Italiana Aerosol**
- [aia.federchimica.it](http://aia.federchimica.it)
- [aia@federchimica.it](mailto:aia@federchimica.it)

## Netherland
**NAV – Nederlandse Aerosol Vereniging**
- [nav-aerosol.nl](http://nav-aerosol.nl)
- [info@nav-aerosol.nl](mailto:info@nav-aerosol.nl)

## Poland
**PACDI – Polish Association Of Cosmetic And Detergent Industry**
- [kosmetyki-detergenty.pl](http://kosmetyki-detergenty.pl)
- [biuro@kosmetyki-detergenty.pl](mailto:biuro@kosmetyki-detergenty.pl)

## Portugal
**APA – Associacao Portuguesa De Aerosois**
- [apa@fiovde.pt](mailto:apa@fiovde.pt)

## Spain
**AEDA – Asociacion Espanola De Aerosoles**
- [aeda.org](http://aeda.org)
- [aeda@aeda.org](mailto:aeda@aeda.org)
Worldwide

Sweden
CADEA - Camara Argentina Del Aerosol
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Türkiye
ASAD - Aerosol Sana Yicileri Dernegi
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United Kingdom
BAMA - British Aerosol Manufacturers Association
bama.co.uk	enquiries@bama.co.uk

Argentina
CADEA - Camara Argentina Del Aerosol
cadea.org.ar	cadea@cadea.org.ar

Australia
AAANZ - Aerosol Association of Australia & New Zealand
aerosol.com.au	info@aerosol.com.au

Brazil
ABAS - Associacao Brasileira De Aerossois
abas.eco.br	abas@abas.eco.br

China
CPF - China Packaging Federation
eaerosolchina.com	info@aerosolchina.org

Chile
CCA - Camara Chilena Del Aerosol
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Mexico
IMAAC - Instituto Mexicano del Aerosol A.C.
aermaacmexico.org	claudia.lince@imaacmexico.org

Russia
RAF - Russian Aerosol Federation
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Ukraine
UUAPM - Ukrainian Union of Aerosol Products Manufacturers
uuapm2020@gmail.com

USA
HCPA - The Household and Commercial Products Association
thehcpa.org	info@thehcpa.org

Venezuela
CAVEA - Camara Venezolana De Aerosoles
cavea111@gmail.com
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