

France shows modest growth in a mature market...



The number of aerosol products filled in France in 2018 totaled 696 million, according to the Comité Français des Aérosols (French Aerosol Committee or CFA). This is an increase of 10.4 million units (1.5%) from 2017, which saw fillings of 685.6 million. Based on mature markets, filling activity was stable in France in 2018, despite major losses in the Food segment. Results are based on data provided by both members and non-members of the CFA.

Personal Care

Personal Care aerosols saw an increase of 3.5% for a total volume filled of 444.5 million units.

Deodorants & Antiperspirants: -7.2% filling volume in 2018

This sub-category of Personal Care aerosols suffered from a slight decrease, following the trend of previous years. According to the CFA, this drop in production was the result of:

- The disappearance of brand owners
- New products that did not meet consumer expectations
- Competition from roll-ons
- Aggressive promotional marketing of non-French aerosol products on the French market

Hair Mousse & Hairspray: +20.7% filling volume in 2018

This increase could be justified by a significant transfer of production to France in 2018.

Shaving Foams & Shaving Gels: +3.3% filling volume in 2018

This segment is growing moderately in a mature market. New “Hipster” fashion trends have benefited barber’s care products more than shaving foams and gels, said CFA.

Sun Care, Water Sprays, Dry Shampoos, Other: -4% filling volume in 2018

In 2018, dry shampoo and water spray volume increased slightly, but it did not offset the decline in sun care products.

Household Care

Household Care saw an increase of 17% for a total volume of 72.9 million units filled in 2018.

Air Fresheners: + 16.3% filling volume in 2018

The air freshener sub-category recorded its strongest growth in recent years. In 2018, many large retailers launched air fresheners under their own brands and more products are expected to move to the commercial phase in 2019. The air freshener category has gained consumers, despite certain negative media attention.

Horticultural Insecticides: + 28% filling volume in 2018

At 28%, the horticultural insecticides sub-category saw the strongest growth. There are two possible reasons for this:

- For the first time, aerosol horticultural insecticide products filled in France were exported.
- Temperature increases and weather variations (eg. continuous rains in the summer of 2018) may have increased demand for insecticides.

France 2018 Aerosol Fillings (in millions of units)

Category	Steel Containers	Aluminum Containers	2018 Total	Category %	2017 Total	2018 vs. 2017 in millions of units	2018 vs. 2017 in %
PERSONAL CARE	104.5	340	444.5	64%	429.6	14.9	3.5%
Deo & Antiperspirant	4.5	120	124.5	18%	134.1	-9.6	-7.2%
Hair Mousse & Hair Spray	60.6	100	160.6	23%	133.1	27.5	20.7%
Shaving Mousse & Shaving Gel	30	20	50	7%	48.4	1.6	3.3%
Sun Protection, Water Spray, Dry Shampoo, Other	9.4	100	109.4	16%	114	-4.6	-4%
HOUSEHOLD CARE	70.9	2	72.9	10%	62.2	10.7	17.2%
Insecticide & Plant Products	27.6	0	27.6	4%	21.6	6	28%
Air Freshener	36.6	1	37.6	5%	32.4	5.2	15.9%
Textile & Carpet, Furniture Polish, Oven Cleaner, Kitchen & Bathroom, Shoe & Leather Protection, Other	6.7	1	7.7	1%	8.2	-0.5	-6.3%
MISCELLANEOUS	96.3	82.3	178.6	26%	193.8	-15.2	-7.8%
Cars & Bikes (excluding paint), Paint & Varnish, Industrial & Technical	90	5.8	95.8	14%	81.5	14.3	17.6%
Pharma & Veterinary	4	75.5	79.5	11%	84	-4.5	-5.4%
Food, Other	2.3	1	3.3	0%	28.3	-25	-88.4%
GRAND TOTAL:	271.7 (39%)	424.3 (61%)	696	100%	685.6	10.4	1.5%

Others (maintenance, textiles, carpets): - 7.5% filling volume in 2018

This drop in production is quite relative, according to the CFA, as the category concerns only 600,000 units in volume. In addition, consumer turnover of products in this sub-category is somewhat low.

Miscellaneous

There was a decrease of 7.8% for a total volume filled of 178.6 million units in 2018.

Cars & Bikes, Paints & Varnishes, Industrial & Technical: + 17.6% filling volume in 2018

Since 2015, this sub-category has been growing. Improved aerosol design and proposed innovations allowed manufacturers greater creativity. The CFA noted an increase in anti-puncture products for cars and bikes.

Pharmacy & Veterinary: - 5.4% filling volume in 2018

This segment is traditionally strongly represented by France, said CFA. Filling volumes depended on new product launches.

Production activities for the years 2017 and 2018 did not include volumes of metered dose inhalers (MDIs), which the CFA does not consider aerosol dispensers. Other European associations, such as the British Aerosol Manufacturers Association (BAMA) in the UK, also exclude MDI volumes from its statistics, explained CFA. By adopting this new method of calculation, the

CFA has refined its national analyses to be consistent with other European countries.

Food & Miscellaneous: - 88% filling volume in 2018

The CFA noted that the transfer of business abroad explains this very sharp decline.

Outlook 2019

So far in 2019, the CFA has welcomed three new member companies: Sidel, McBride and Emerson. This brings the total number to 59.

The CFA remains vigilant of regulatory and political events that could impact production activity of its members. Items of note in 2019 include:

- **The “EGalim” Law**—Promulgated on Nov. 1, 2018, this law concerning trade relations in the agricultural sector could impact the production of aerosol dispensers in France this year. The *Insecticides* sub-category could be directly affected (pending the publication and the application of the decree). Indeed, it is possible that it will be forbidden for certain biocidal products to be made available for sale to non-professional users (do-it-yourselfers). Advertising directly to non-professional users, as well as allowing discounts, rebates and a reduction in prices in certain other categories of these products will also be prohibited.
- **Brexit**—The UK’s exit from the European Union could generate the transfer of filling lines in France. [SPRAY](#)

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