

Brazilian aerosol production

Deodorants dominate; insecticides increase in 2020...



The Brazilian Aerosol Association (Associação Brasileira de Aerosóis e Saneantes Domissanitários or ABAS) recently released its 2020 aerosol statistics for Brazil. The report revealed that total aerosol consumption was over 1.28 billion in 2020. This shows a 7.9% decrease from 1.39 billion in 2019. Overall, 85% of aerosols in Brazil were filled domestically; 15% were imported.

Personal Care dominated the product categories with 697.4 million units and 54% of overall aerosol production. This was a 12.2% decrease from 794.6 million in 2019. The lion's share of the Personal Care aerosol market was Deodorants, which represented nearly half (48%) of all aerosol units produced in 2020.

The second highest aerosol production category was Insecticides at 275.3 million, which grew 7.8% from 255.4 million in 2019. A distant third was Household Care at 126.5 million units, which fell 9.5% in 2020 from 139.8 million units in 2019.

The Brazilian aerosol market is projected to grow steadily year-over-year to reach 2.085 billion units in 2030, ABAS reported. **SPRAY**

2020 Brazilian Aerosol Market (in millions of units)

Categories	2019	2020	% Change	Share of category
Personal Care	794.6	697.4	-12.2%	54%
Deodorants & Antiperspirants			-	48%
Hair Sprays			-	2%
Shaving Cream			-	2%
Others			-	2%
Insecticides	255.4	275.3	7.8%	22%
Household	139.8	126.5	-9.5%	10%
Industrial / Automotive			-	4%
Paints			-	3%
Other			-	3%
Pharmaceutical			-	2%
Veterinary			-	2%
Grand Total	1,390.5	1,280.3	-7.9%	100%

AEROBAL reports on 2021 aluminum aerosol can industry

The International Organization of Aluminum Aerosol Container Manufacturers (AEROBAL) reported that global shipments by its member companies fell by 3.9% to approximately 2.9 billion units in the first half of 2021. The year-on-year decline was moderate, said AEROBAL, as global demand was still lively in the first quarter of 2020. The COVID-19 pandemic did not have a full impact on the market until the second quarter of 2020.



Sales of deodorant and hair spray—as with the entire personal care sector—suffered in the first half of 2021 because consumers went out-of-doors less frequently due to the pandemic. As a result, deliveries to the deodorant market, which account for approximately 60% of all deliveries in the industry, fell by almost 2%. Deliveries to the hair spray segment were hit much harder and fell by a clear double-digit rate, AEROBAL reported.

Developments in the food sector were more positive, as consumers spent more time at home and cooked meals for themselves. Worldwide deliveries to this niche market increased by almost 50%.

The specific, pandemic-related sales boom in disinfectants seen in 2020 did not continue in 2021, as AEROBAL speculated that these products were more likely to be packaged in plastic bottles.

Rising raw material prices

"AEROBAL members are very concerned about the skyrocketing price of aluminum," observed AEROBAL President Leopold Werdich.

"The manufacturers who now have to stock up on metal are in a mess. Other relevant cost drivers are paints, printing inks, cardboard packaging, energy, wages and transport services. The pressure comes from all sides at the same time," he said.

While supply bottlenecks have already been reported in other industries due to a tense situation in the raw material markets, AEROBAL noted that the supply chains in the aluminum aerosol can industry have so far been stable. However, there is increased anxiety within the industry.

Bottleneck scrap availability

Sustainability and decarbonization are still at the top of the agenda in the aluminum aerosol can industry, said AEROBAL. In particular, customers' requests to use recycled material in aluminum aerosol cans represents a major challenge for manufacturers due to the limited availability of scrap that meets the high demand.

AEROBAL concluded that the general mood in the industry is subdued due to the extreme cost burden, even if the current demand is satisfactory. A sustainable upturn is not expected until 2022. **SPRAY**