

French aerosol production stays stable

CFA points to growth in Personal Care and Paints...



The number of aerosol products filled in France in 2021 totaled 646 million, according to the Comité Français des Aérosols (French Aerosol Committee or CFA). This is a slight decrease of one million units (0.2%) from 2020, which saw fillings of 647 million.

The industry remained stable and the filling activity reflected the impact of the COVID-19 pandemic health crisis on the industry in 2021, as it did in 2020, CFA said. CFA also noted that the French aerosol industry remains in a strong position in Europe.

The Personal Care category grew by nine million units in 2021 (2.2%) with a predominant recovery of the Deodorants (9.5%) and Hair Care (7.5%) segments. On the other hand, shaving products suffered a significant decline (-15.7%), CFA reported.

The recovery of business enabled the Car & Motorcycle, Paint & Varnish and Industrial & Technical Products categories to gain in volume (5.4%). However, two categories that suffered a decline in 2021 were Household (-7.5%) and Pharma & Veterinary (-10.7%). CFA noted the Miscellaneous category was slightly down in 2021, but the segments that make up this category are not impacted in the same way as others. Food aerosols were also down 11.5%.

Inhalers are not included in CFA statistics, nor are plastic aerosols, which represent a negligible volume. Results are based on data provided by both members and non-members of the CFA.

"I would particularly like to thank the component producers, fillers and marketers, members and non-members of the CFA who have helped to give us a precise vision for 2021," said Jean Blotiere, CFA General Delegate.

"As with last year, the feedback was extremely comprehensive and the result allows us to properly assess the weight of our industry in France."

Personal Care

Personal Care saw an increase of 2.2%, for a total filling of 404 million aerosol units in 2021. The category represents 63% of total fillings in France.

Deodorants & Antiperspirants: +9.5% filling volume in 2021

The recovery of AP/Deos was linked to the end of the 2020 lockdown, which had negatively impacted sales. This segment represents 15% of total fillings.

Hair Mousse & Hairspray: +7.5% filling volume in 2021

This segment increased in 2021 at the end of the 2020 lockdown, but did not achieve its 2019 level. It represents the largest segment of total activity (23%). Much of that activity is for export; however, the aerosol has suffered from competition from other forms of packaging, CFA said.

France 2021 Aerosol Fillings (in millions of units)

Category	Steel Containers	Aluminum Containers	2020 Total	2021 Total	2021 vs. 2020 in millions of units	2021 vs. 2020 in percentage
PERSONAL CARE	78.49	326.0	395.63	404.5	8.9	2.2%
Deo & AP	6.05	90.0	87.69	96.05	8.4	9.5%
Hair Mousse & Hair Spray	29.91	119.0	138.51	148.91	10.4	7.5%
Shaving Mousse & Shaving Gel	29.36	12.0	49.08	41.36	-7.7	-15.7%
Sun Protection, Water Spray, Dry Shampoo, Other	13.17	105.0	120.35	118.17	-2.2	-1.8%
HOUSEHOLD CARE	58.22	3.0	66.19	61.22	-5.0	-7.5%
Insecticide & Plant Protection Products	28.32	0	28.77	28.32	-0.4	-1.6%
Air Fresheners	19.74	1.0	24.75	20.74	-4.0	-16.2%
Textile & Carpet, Furniture Polish, Oven Cleaner, Bathroom/ Kitchen, Leather & Shoe, Other	10.16	2.0	12.67	12.16	-0.5	-4.0%
MISCELLANEOUS	101.29	79.0	185.18	180.29	-4.9	-2.6%
Cars & Motorcycles (excl. paint), Paint & Varnish, Industrial & Technical	94.07	4.0	93.01	98.07	5.1	5.4%
Pharma & Veterinary (excluding inhalers)	2.65	73.0	84.75	75.65	-9.1	-10.7%
Food, Other	4.57	2.0	7.42	6.57	-0.9	-11.5%
GRAND TOTAL	238.0	408.0	647.0	646.0	-1.0	-0.2%

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Shaving Foams & Shaving Gels: -15.7% filling volume in 2021

In 2020, the small decline in this segment was a surprise, considering the lockdown impact on other segments, said CFA; the significant drop in 2021 probably compensates for the lack of shaving maintenance in 2020. The Shaving segment represents 6% of all aerosol production in France.

Sun Care, Water Sprays, Dry Shampoos, Other: -1.8% filling volume in 2021

This segment, which was growing at 20% in 2020, has been maintained in 2021. These versatile products are easily impacted by fashion or weather phenomena. Also, the building up of stocks at the end of 2020 likely anticipated the rising costs of raw materials in 2021, CFA said.

Household Care

Household items saw a drop of -7.5% to 61 million aerosol units filled in 2021, which represents 9% of all units.

Insecticides/Plant Protection: -1.6% filling volume in 2021

This segment was reduced by 400,000 units in 2021. The weather still has a major impact on these products (mosquitoes, hornets, etc.). French regulations on biocides since 2019 have stabilized the segment, which represents 4% of total fillings. Indeed, the legislation on biocides through the Egalim law has penalized the marketing of insecticides to the general public. These constraints led to a drop in volume in 2018, but since 2019, the level has remained constant, CFA reported.

Air Fresheners: -16.2% filling volume in 2021

The Air Freshener segment represented the biggest drop in 2021. CFA said several factors can explain this—the transfer of production abroad, mistrust of certain products and/or reduced purchases of non-essential items. This segment represents 3% of total fillings.

Materials

Others (textile /carpet, furniture polish, leather/shoe care, oven cleaners, bathroom/kitchen cleaners, other household): -4% filling volume in 2021

In 2020, the Others segment increased by 36%, stimulated by the need for disinfectants due to the COVID-19 crisis. The 4% drop in 2021 represented only 500,000 fewer units;

consumer demand for disinfectant products remains strong, CFA noted.

Miscellaneous

The Miscellaneous segment saw a slight decrease of 2.6%, bringing the total aerosol filling to 180 million units in 2021, representing 28% of all filled volume.

Cars & Motorcycles, Paints & Varnishes, Industrial & Technical:

+5.4% filling volume in 2021

This segment, which represents 15% of total aerosol fillings, benefited from the recovery of activities in 2021 and the continuation of work-from-home in particular, CFA reported.

Pharmaceutical & Veterinary:

-10.7% filling volume in 2021

This segment is traditionally strong in France, representing 12% of all fillings. These products depend on the development of diseases/viruses. In 2021, sanitary instructions (wearing masks, etc.) likely slowed down the development of other types of diseases, CFA said.

Food & Others:

-11.5% filling volume in 2021

In 2020, a high percentage of growth in the Food category, which corresponded to 3.8 million units, could not be explained. In 2021, a readjustment was made, said CFA.

Launched in 2021, AXE Déodorant Homme Spray Dark Temptation features a fresh and chocolaty scent.

Outlook 2022

The CFA believes that 2022 will continue to be a year of disruption, in terms of worldwide crises. The lead times and cost constraints of raw materials, as well as the impact of inflation on purchasing power, will not be negligible. Globally, production figures for 2022 will likely be lower than in 2021, with less sustained consumption, particularly for Personal Care products, CFA concluded.

Following 2021 a fertile year, CFA announced five new member companies, including, **WD-40 Co., La Tourangelle, ITW SPRAYTEC, Fluidmail** and **Sherwin Williams**. This brings CFA's membership to 57 companies who expressed their desire to work together to discuss the latest regulations as well as practical topics such as safety and storage, standardization, recycling and water bath testing.

Joining the CFA helps [us] to stay informed and vigilant, especially in the face of complicated laws, noted Jacques Devarenne, Commercial Director at Fluidmail, following recent regulations for aerosol dispensers and the curtailing of fraudulent products.

The customer is challenging us more and more and regulatory issues are gaining momentum, added Sòverine Poinsignon, Logistics & Projects Manager at WD-40 Co. We need to be more responsive and reassuring.