

French aerosol production stays steady

Household, Personal Care categories continue to grow...



In 2023, French total production of aerosol dispensers reached 657.91 million units, according to the Comité Français des Aérosols (French Aerosol Committee or CFA). This is an increase of 1.3% over the 649.78 million units filled in 2022. However, totals by category varied greatly.

On average, there were 11 aerosol products used per person in France in 2023. The top three uses included:

1. **Personal Care:** 63%
2. **Auto & Bike Care:** 15%
3. **Paints/Varnishes, Industrial/Technical, Pharmaceutical/Veterinary:** 12%

Results are based on declared data from both CFA members and non-members. Production and filling statistics published since 2017 do not include inhalers, as they are not considered aerosol dispensers per EU ADD 75/324, said CFA.

Personal Care

The Personal Care category grew by 11.1%; there were a total of 497 million units filled in 2023, accounting for 76% of total production.

The Antiperspirant/Deodorant segment grew 25% and accounted for 21% of French aerosol filling. CFA noted that the launch of new brands and the extended summer heat may explain this phenomenon. Promotional activities may also have had an impact on demand.

Hair Care products (excluding Dry Shampoo) grew 13%. After declining in 2022, this segment returned to a higher level in 2023; at 24%, it accounts for the largest share of total production in France.

Shaving Foams & Gels saw a 22% increase in production. This segment has returned to pre-COVID-19 crisis levels, said CFA, and represented 8% of French production activity in 2023.

The Sun Care/Water Spray/Dry Shampoo/Other Body Care segment declined 3.8%. It had grown by 30% in 2022. In 2023, the decline of almost 4% takes it to a level that is still well above 2019 production levels. Inflation's impact on purchasing power may explain the decline in this product segment, which is highly versatile and quickly affected by external phenomena such as fashion or weather. At 23%, this segment still represented a significant percentage of 2023 French aerosol production.

Household Care

The Household Care category grew 8%, with fillings totaling 76 million units, representing 12% of total aerosol production in 2023.

There was a strong increase in the Air Freshener segment (34.5%). CFA attributes the growth to consumers' need to purify their homes, as well as places open to the public. Promotional activity has undoubtedly also had an impact on demand, further explaining the growth in this segment, which accounts for 5% of total fillings in France.

The Insecticide/Horticultural (Plant Protection) segment suffered in 2023. There was a 55% drop in production, representing almost 15 million fewer units filled. The CFA believes the weather is still having a major impact (mosquitoes, hornets, etc.), but above all, biocide regulations in

France are making it more complicated to place these types of products on the market. This segment represents 2% of total activity.

The Other segment (Textile/Carpet, Furniture Polish, Oven Cleaner, Bathroom & Kitchen Cleaner, Leather/Shoe Care and Other Household Products) saw an increase of 66%. In 2020, this segment saw strong growth due to demand for cleaning and disinfecting products. This new growth trend, with 2023 the highest production year yet, representing more than 11 million units, reflects the need for effective products for a wide variety of specific aerosol applications. Other accounts for 4% of total aerosol production.

Miscellaneous

The Miscellaneous category had a total volume of 84 million units, a decrease of 35% from 2022. This category represents 13% of total aerosol production in France. The segments that comprise the Miscellaneous category did not experience consistent changes, said CFA.

The Pharmaceutical/Veterinary segment saw a decline of 4.5%. It represented 4% of total aerosol production in 2023. The decline in this segment seems to be explained by a reduction in ailments or illnesses, or by inflation, which has driven consumers towards other forms of product, noted CFA.

By contrast, the Automotive/Cycle, Paint/Varnish & Industrial/Technical segment is down sharply (-43.5%). This segment, which represents 8% of total activity, was impacted by a shortage of raw materials that prevented production from keeping pace with market demand. However, the CFA's statistics commission questioned this drop, which could also be explained by a wrong segment allocation by some fillers. The need for these specific products remains constant and the practicality and efficiency of aerosols as a form of packaging contribute to their attractiveness.

"We hope that the supply chain impact will be limited in 2024," said CFA.

The Food/Other segment was down by more than half (-51.2%). This segment, which had remained stable in 2022, saw a significant drop in production in 2023. This is relative, given the low volume, but the percentage impact is substantial. This segment represents less than 0.5% of the total production.

Recycling

The French recycle 79% of all aerosol products every year; visit recyclage.cfa-aerosol.com to learn how to recycle aerosol products in France.

2024 insights

The CFA believes that supply chain disruptions will have repercussions in 2024. Supply delays, raw material cost increases and the impact of inflation on purchasing power will also affect the year's activity. However, as in 2023, not all segments will be impacted in the same way. **SPRAY**