



# The Spray Remains the Same

## 2023 UK aerosol production matches 2022 levels...

The British Aerosol Manufacturers' Association (BAMA) has released its UK aerosol filling figures for 2023, showing that volume remained stable compared to 2022, despite geo-political developments, supply chain challenges and the cost-of-living crisis. In 2023, 1.42 billion aerosols were filled, compared to 1.43 billion in 2022.

### Personal care

The annual BAMA survey revealed that, as anticipated, the Personal Care category made up the lion's share of filling volume, accounting for 74% of the total—up from 71% in 2022. Representing the mainstay of UK aerosol manufacturing, Personal Care grew by nearly 3% and individual subcategories, such as Deodorant/Body Sprays and Antiperspirant, rose by 4.5% and nearly 13.5%, respectively.

BAMA Chief Executive Patrick Heskins noted, "Most of the categories showing the biggest percentage shifts are the smaller ones, which have a tendency to fluctuate in line with how the year has been. For instance, [production of] SelfTan [aerosol products] more than doubled in volume and is a likely indicator of the rather wet summer of 2023."

The filling of shaving products dropped again, signifying the ongoing trend seen since the early 2000s, and no doubt reflects ongoing facial hair fashions that have supplanted the "wet shave" in recent times.

"Despite the drop in filling volume this year, there are many new products coming onto the market to entice those still wet shaving to experiment with," added Heskins.

### 2023 UK Aerosol Fillings by Category (in millions of units)

Insecticides.....	6.146
Paints & Lacquers.....	47.662
Air Fresheners.....	133.318
Polish.....	12.592
Shoe & Leather Treatment.....	2.364
Starches & Fabric Finish.....	5.642
Oven Cleaners.....	0.494
Hard Surface Cleaners.....	10.487
Other Household.....	56.640
Shaving Preps.....	127.025
Hair Care.....	167.814
Perfumes & Colognes.....	1.235
Deodorants & Body Sprays.....	254.830
Antiperspirants.....	484.038
Other Personal Care.....	10.928
Suntan & Artificial Bronzing.....	4.067
Medical & Pharmaceutical.....	30.643
Veterinary & Pet Care.....	2.415
Automotive.....	13.208
Industrial.....	46.861
Food.....	0.100
Miscellaneous.....	2.844
<b>TOTAL: .....</b>	<b>1,421.354</b>

### Household

In the Household category, macro-environmental factors again played a role, as the post-COVID-19-pandemic era likely affected the continued decline of hard surface cleaners. Also, the volume of Air Fresheners produced in the UK dropped to 133 million in 2023 from a peak of nearly 200 million in 2017. One major brand owner's move to an "aerosol free" product during 2022/2023 may offer an explanation for this significant swing, opined BAMA.

Also, the different ways fragrances can

be released into the home environment have developed exponentially over recent years—aerosols, pump sprays, trigger sprayers, reed diffusers, plug-in devices, scented candles and a whole host of other systems now give consumers a huge choice.

"While there are increased household fragrance options available, the aerosol package still has a place in this market," emphasized Heskins.

"Perhaps, the instant benefits aerosols bring when tackling pungent odors could be revisited."

### 2023 UK Aerosol Fillings by Category (percentage change from 2022)

Personal Care.....	2.8%
Household Products.....	-19.1%
Industrial.....	2.7%
Paints & Lacquers.....	26.4%
Medical & Pharmaceutical.....	-0.3%
Automotive.....	-19.5%
Insecticide.....	-27.8%
Veterinary & Pet Care.....	79.6%
Food.....	0.0%
Miscellaneous.....	93.1%

### Technical

In the technical categories, the growth of aerosol cans filled in the Paints & Lacquers category continues on an upward trajectory, one that it has enjoyed since the turn of the century. This, combined with stable volumes in Automotive and Industrial aerosol filling, shows that the sector is strong, and that the aerosol dispensing system still offers many unique advantages.

### Aluminum vs. Tinplate Steel

The most significant change in the 2023 filling data, compared to 2022, is the split between tinplate steel and aluminum aerosol containers. Of the 1.42 billion units produced during 2023, 543 million (38%) were made from tinplate steel, while the remaining 877 million (62%) were made from aluminum. This sizable shift from 2022 (when steel had a 48% share and aluminum a 52% share) suggests the impact of a move away from steel by a major brand owner, with other smaller brand owners and in-house or "own label" products likely following suit.

"There has been an ongoing trend for many years in UK aerosol manufacturing to move more into aluminum containers, [and] 2023 shows a significant jump," observed Heskins.

"Also, although it is still a relatively small percentage, it is worth noting that the volume of plastic aerosols filled is on the increase," he said.

Summing up the figures for 2023, Heskins commended the overall "astounding achievements" of Industry to date.

"BAMA continues to be proud of what all those involved in the UK aerosol manufacturing industry have accomplished, along with their continued focus on innovation while upholding incredible standards of safety and quality," he concluded.

"The volume filled in 2023 shows that aerosol dispensers are still very much a product [that] consumers want, need and enjoy. I look forward to an even better 2024." **SPRAY**