

Growth in UK Aerosol Sector



*for Fourth
Successive Year*



information influence insight

The UK aerosol sector has grown for the fourth year running, according to the British Aerosol Manufacturers' Association (BAMA). The annual UK filling figures show an overall increase of 3% for 2014 compared with the previous year.

In total, UK producers filled 1.5097 billion cans last year, with aerosols produced for both the UK and overseas markets. The leading category, Personal Care, was particularly robust, with some of the highest percentage growth figures. The Industrial category also increased.

Personal Care

The largest growth in a single personal care product category came from suntan and bronzing products with an increase of 16% year on year (y.o.y.), although from a relatively small base. In 2013, 2.2 million suntan and bronzing product cans were filled, increasing to 2.5 million in 2014.

Hairspray products remained buoyant with 10% y.o.y. growth to 97.8 million cans filled, some of which is probably accounted for by export demand for dry shampoos.

The largest single aerosol segment, deodorants, anti-perspirants and body sprays, was also a strong category showing a 7% y.o.y. growth, up from 705 million in 2013 to 754.8 million last year.

"Other personal care" (personal insect repellents, shower gels, hand lotions, talcs, depilatories and feminine care products) benefited from 29% growth, rising from 11.6 million cans filled in 2013 to 14.9 million last year.

Product Category	Cans filled (millions)	% Change 2014 v. 2013
INSECTICIDES	6.2	47%
PAINTS/LACQUERS	13.9	-4%
AIR FRESHENERS	184.7	-2%
WAXES/POLISHES	22.4	-11%
OVEN CLEANERS	1.1	-2%
STARCHES	3.2	-39%
OTHER HOUSEHOLD	77.3	1%
HAIR PRODUCTS	97.8	10%
AP/DEO/BODY SPRAYS	754.8	7%
SHAVING PRODUCTS	190.9	-5%
PERFUMES/COLOGNES	9.0	-16%
SUNTAN/BRONZING PRODUCTS	2.5	16%
OTHER PERSONAL	14.9	29%
AUTOMOTIVE	32.8	-5%
SHOE/LEATHER CLEANERS	3.8	137%
HARD SURFACE CLEANERS	13.3	-17%
VETERINARY/PET CARE	3.0	16%
MEDICAL (EXCLUDING INHALERS)	20.1	-4%
INDUSTRIAL	38.4	12%
MISC.	19.6	-5%
TOTAL	1,509.7	3%

Two personal care categories, however, showed notable decline for 2014. Colognes & perfumes in aerosol format declined by 16% compared with the previous year. Shaving products, which remained a significant category with 190.9 million cans filled, fell by 5%, possibly reflecting the current male fashion trend for facial hair in favor of the clean-shaven look.

Household aerosol products

The biggest percentage growth in household products came from insecticides, which grew by 47% to 6.2 million cans last year compared with only 4.2 million cans produced in 2013.

Shoe & leather cleaners proved highly resilient with a 137% y.o.y. change to reach 3.8 million cans, the biggest fillings seen in this category. The increase indicates possible movement in patterns of production with a return to the UK rather than an upswing in consumer usage patterns.

"Other household products" (including cleaning products not already cited plus DIY goods) rose by a modest 1% y.o.y. to a total of 77.3 million cans. Some areas within the household sector were less resilient. Air fresheners, while remaining a significant category at 184.7 million cans, nonetheless fell by 2%. Air freshening products remain popular, with BAMA reporting that this slight decline may be due to consumers choosing other formats, including plug-in products.

Waxes and polishes fell by 11% to 22.4 million and oven cleaners also declined by 2%. Starches were dramatically down in production terms, with a fall of 39%, decreasing from 5.3 million in 2013 to 3.2 million cans in 2014.

Other categories: Vet/pet & Industrial

Veterinary & pet care showed strong growth, up 16% to three million cans. Industrial aerosols ended on a high note with 12% growth up from 34.4 million cans filled in 2013 to 38.4 million last year, continuing the steady growth trend for industrial aerosol products experienced in the UK since 2011.

Overview

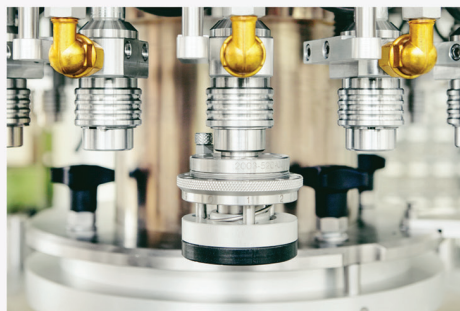
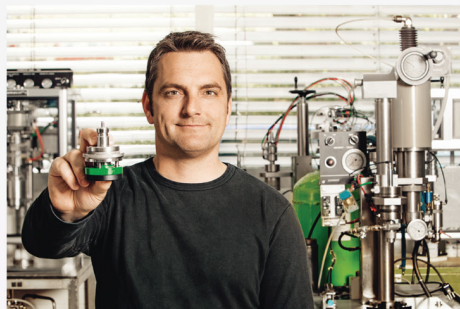
"For the fourth successive year, the UK aerosol sector has grown," commented Dr. John Morris, Chief Executive of BAMA. "In 2011 we saw a 9% y.o.y. increase; in 2012 a 5% increase; 2013 saw a modest 0.1% overall gain; and now we are seeing a 3% rise in 2014.

"The aerosol sector makes an important contribution to British manufacturing and export successes. Importantly, the industry's focus, not only on growth but on continuous and close attention to safety and sustainability, means that brand owners are keen to embrace the aerosol format. Our work, along with other organizations, to ensure that aerosols are recyclable means that consumers as well as manufacturers, retailers and packaging decision makers see the format as highly sustainable and convenient to use."

The UK remains the third largest filler in the world after the U.S. and China. **SPRAY**

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