



2026

Shaping what comes next



Leadership Message

Message from the President



Dario Steiner
President, European
Aerosol Federation (FEA)

Dear Valued FEA Members,
Dear Partners and Stakeholders,
Dear Friends,

Europe is living through a period of profound transformation. Regulatory frameworks are evolving rapidly, sustainability expectations continue to rise, and industrial competitiveness has become a central topic in the European debate. In this environment, the aerosol industry has once again demonstrated what has always been one of its defining characteristics: its ability to adapt, innovate and move forward.

Our products may often be taken for granted, yet they play an essential role in the daily lives of millions of consumers. Behind every aerosol product stands a sophisticated industrial ecosystem built on science, manufacturing excellence, safety and continuous technological progress. It is an industry that has repeatedly shown its capacity to evolve while meeting ever-higher standards of environmental and social responsibility.

The past year has also been a defining one for our Federation itself. Faced with significant financial challenges, the FEA undertook a comprehensive review of its operating model and cost structure.

Difficult decisions were required, but they were made with a clear objective: securing the long-term future of the Federation while preserving the quality of service, technical support, advocacy activities and value delivered to our member associations and the companies they represent.

I am proud to say that we have successfully completed this transformation. Through disciplined cost management, greater operational efficiency and a shared commitment to our mission, the FEA has strengthened its financial foundations without compromising its effectiveness or ambitions. Today, the Federation enters a more stable and sustainable phase, better equipped to focus on its strategic priorities and future growth.

This achievement would not have been possible without the extraordinary solidarity shown by our member associations. Many stepped forward to provide exceptional financial support during this critical period, demonstrating their strong belief in the value of the FEA and the importance of maintaining a united European voice for our industry. Their commitment was not simply support for an organisation; it was an investment in the future of the European aerosol sector. For this, I would like to express my sincere gratitude.



My vision for the FEA is built on three principles: **Unity**, because our influence grows when we speak with one voice; **Credibility**, because facts, science and transparency must remain the foundation of our engagement with institutions and stakeholders; and **Ambition**, because maintaining the status quo is not enough. We must actively contribute to shaping the future of European industry.

As President of the European Aerosol Federation, I am convinced that our future will not be defined by regulation alone, nor by technology alone. It will be defined by our ability to build a shared vision for the European aerosol industry and to lead change rather than simply react to it.

Looking ahead, I remain optimistic. Across Europe I see companies investing, innovating and preparing for the challenges of tomorrow. I see an industry that is resilient, responsible and confident in its future. Together, let us not simply adapt to the future. Let us help shape it.

Message from the Secretary General

Delivering More with Less: Expertise, Engagement and Adaptation



Alain D'haese
Secretary General,
European Aerosol
Federation (FEA)



The past year has once again demonstrated that adaptation is not merely a necessity—it is a strength. In a rapidly evolving regulatory and economic environment, the European aerosol industry continues to face significant challenges. Yet, as our industry has done many times before, we are turning these challenges into opportunities through expertise, cooperation and innovation.

For FEA itself, 2025-2026 was a period of transformation. Following an internal restructuring, the Secretariat evolved from two full-time equivalents to 1.2 full-time equivalents. Such a change inevitably required us to reassess priorities and working methods. I am therefore particularly proud that, despite a leaner structure, FEA has continued to deliver tangible results and maintain its leading role as the voice of the European aerosol industry.

The breadth of issues on our agenda illustrates both the complexity and the importance of our work. We have been actively engaged in

discussions on the future of larger plastic aerosol dispensers, the simplification of the Classification, Labelling and Packaging (CLP) Regulation, implementation of the Packaging and Packaging Waste Regulation and the F-gases III Regulation, the adaptation of dangerous goods transport rules to retail deliveries, clarification of the distinction between aerosol dispensers and gas cartridges, and the development of dedicated industrial safety webinars. At the same time, we have proactively initiated discussions on future frameworks for refillable pressurised dispensers, ensuring that innovation can develop within a clear and practical regulatory environment.

These achievements are only possible because of the remarkable commitment of experts from across our industry. Their knowledge, time and willingness to engage are the foundation of FEA's effectiveness. Equally important is our collective responsibility to attract and involve a new generation of specialists. Diversity of perspectives and the inclusion of younger experts will be essential to maintaining the expertise our industry needs in the years ahead.

I would also like to recognise the pivotal role played by our National Associations. They remain indispensable partners in coordinating advocacy, gathering expert input, educating members, and ensuring that European initiatives are translated into practical action at national level.

My sincere thanks go to our Board of Directors, National Associations, company experts and all contributors for their engagement, trust and support. Together, we continue to demonstrate that collaboration is our greatest asset.

Finally, I am delighted to see our partnership with Paris Packaging Week continue to flourish. I look forward to meeting many of you at ADF Paris on 3–4 February 2027.

Industry Perspective

Partner Insight



Paolo Zunino
CEO, GTS S.p.A.

Q: How is GTS using its experience to support innovation and meet the evolving needs of the European aerosol market?

A: For nearly 40 years, GTS has produced and distributed natural gases for the aerosol industry. With production and logistics sites in Italy, Belgium and Romania, we serve customers across Europe and the MEA region.

This network enables us to support their development with tailored solutions, a broad product portfolio and consistently high-quality standards, including HACCP-certified Food Grade gas propellants.

Q: What sustainability initiatives is GTS pursuing to help the aerosol sector move towards a lower-carbon, circular economy?

A: Sustainability is central to our strategy and is reflected in concrete investments. One of our advanced production sites is powered by a 2 MWp photovoltaic plant, providing a high degree of energy independence and supporting our transition to lower-carbon operations.

GTS has also received “ATMO Approved” certification for several consecutive years, recognising best-in-class natural gas production with a very low environmental impact. In addition, our ISCC PLUS certification for bio-LPG ensures supply-chain traceability of renewable raw materials and supports further carbon-footprint reduction.



Q: What role do quality, safety, logistics and industry collaboration play in shaping the future of the European aerosol market?

A: Quality and safety begin with full control of the supply chain. Our ISO 9001:2015-certified laboratories carry out continuous analyses throughout the process, while retained samples ensure traceability and tailored solutions meet specific customer needs. This same discipline applies to industrial safety and the transport.

Through our in-house logistics team, owned fleet and specially trained drivers, we manage road tankers, isotanks and cylinders directly, reducing contamination risks and ensuring reliable deliveries across Europe and worldwide.

➔ Find out more



Collaboration with organisations such as FEA is equally important: it helps the industry anticipate market trends and address tomorrow's regulatory, sustainability and safety challenges together. In this context, GTS positions itself as a strategic and reliable partner for its customers.



Policy & Regulatory Affairs

Technical and Regulatory Outlook



Volker Krampe
Chair of the Steering
Committee



Laurent Flond
Deputy Chair of the
Steering Committee

Throughout 2025 and into 2026, the FEA Steering Committee played an active role in shaping the industry's priorities, ensuring that all major technical and regulatory issues were thoroughly addressed.

This report outlines the principal topics covered and actions taken during this period, highlighting the ongoing dialogue between industry and the United Nations and European Institutions.

The comprehensive list of priorities is reviewed and approved by the Committee of National Association Directors (CNAD), while the Steering Committee assigns specific tasks to dedicated working groups and task forces. Both lists remain dynamic, reflecting the evolving nature of our industry's challenges and objectives.

The European Commission is dedicated to strengthening EU competitiveness and growth while upholding high standards and achieving economic, social, and environmental goals. For this, it aims to streamline rules and reduce the administrative burdens for businesses by 25%, and by 35% for SMEs by the end of this mandate (2029). The 25% reduction target is expected to generate approximately €37.5 billion in savings for businesses.

The simplification Omnibus I (sustainability) revises the corporate sustainability reporting directive (CSRD) and the corporate sustainability

due diligence directive (CSDDD). It also simplifies the carbon border adjustment mechanism (CBAM).

The simplification Omnibus IV (small mid-caps, digitalisation, and common specifications) introduces a new category of small mid-caps companies (SMCs) with lighter obligations, and registration under F-gases III Regulation will be streamlined, particularly benefiting SMEs and SMCs.

The simplification Omnibus VI (chemicals) aims to cut compliance costs and administrative burden for the chemical industry, while maintaining a strong level of protection of public health and the environment.

Despite welcome progress, regulatory complexity continues to place a significant burden on European businesses. Regulatory burden, in addition to the cost of energy, represents a significant challenge to long-term investment in the EU. While the recent introduction of several simplification packages—and the adoption of some of them—is encouraging, considerably more remains to be done to deliver the reduction in administrative burden needed to support Europe's competitiveness.

Regarding the competitiveness of the chemical sector, FEA has observed that several European Commission initiatives aimed at supporting the industry have primarily focused on chemical manufacturers, while downstream users also face substantial financial and administrative burdens. This risks undermining competitiveness across the wider value chain, particularly for SMEs.



Integrating the perspective of downstream users into policy discussions from an early stage would help ensure that chemicals legislation remains ambitious in its objectives while also being pragmatic, proportionate and implementable in practice. Such an approach would strengthen both regulatory effectiveness and industrial resilience throughout the value chain.

- On the **Classification, Labelling and Packaging Regulation (CLP)**, co-legislators agreed to allow for more flexible rules, including easy-to-read labels, wider use of digital labelling, and the easing of advertising rules to reduce costs and complexity, while ensuring consumer protection. However, a minimum font-size requirement has been reintroduced for mixtures placed on the consumer market. Given the limited label space available on aerosol dispensers, the industry may need to consider more complex and potentially more costly labelling solutions.



FEA remains an active participant in UN correspondence working groups, within both the Sub-Committee of Experts on the Transport of Dangerous Goods, which is also the focal point for physical hazards, and the GHS Sub-Committee.

- FEA continues to contribute to discussions led by the German authorities on the differentiation between **UN 1950 Aerosols and UN 2037 Receptacles, Small, Containing Gas (Gas Cartridges)**. Although there are no current safety concerns, some authorities favour limiting the existing flexibility between these categories in specific circumstances. The industry, led by FEA, has developed a guide to support the differentiation for this complex technical issue.
- At the **UN Joint Meeting of the RID Committee and the Working Party on the Transport of Dangerous Goods**, FEA is advocating for an exemption for local deliveries of small end-consumer product quantities from dangerous goods regulations—an approach that would benefit e-commerce and modern retail models such as ‘click & collect’ and ‘click & deliver’ as well as the daily supply of small amounts of consumer goods to the point of sale.
- FEA has initiated discussions aimed at **clarifying UN provisions** relating to simple asphyxiants.
- FEA successfully launched specific **industrial safety webinars** in October 2025 and March 2026.
- **ISO/TC 52** will start new work related to the vocabulary and classification of aerosol cans. FEA will contribute to this work.

Webinar

FEA
European Aerosol Federation

Industrial safety uncovered: key issues across the aerosol manufacturing chain

30 October 2025

14h00-16h00 / CET

Webinar

FEA
European Aerosol Federation

Industrial safety uncovered: hot water bath test and its alternatives told and untold

26 March 2026

15h00-17h00 / CET

pamasol
Swiss Aerosol Solutions



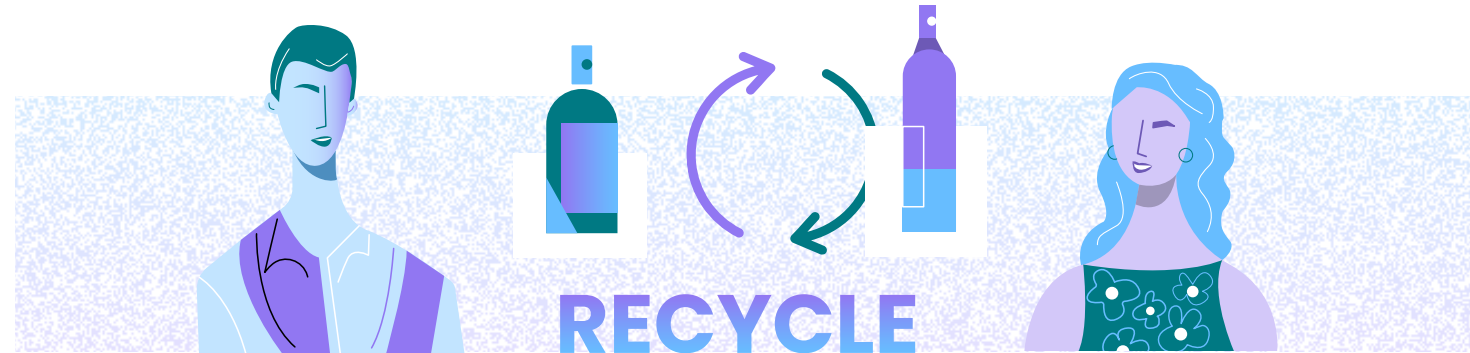
Industrial safety is not a competitive advantage, it is a shared responsibility. FEA webinars bring experts together to exchange practical knowledge, challenge assumptions and strengthen safety across our industry.

Alain D'haese, FEA Secretary General

→ In October 2017, the EC ADD Working Group supported initiating work on **adapting the Aerosol Dispensers Directive 75/324/EEC**, advocating for increased total capacity for plastic aerosol dispensers that meet updated safety standards.

The European Commission has launched a final additional study on PET aerosols incorporating recycled PET, aligned with the requirements of the PPWR. FEA welcomes and supports this initiative.

Aerosol containers are typically made from aluminium or steel—materials with well-established recycling markets. When separated during collection, post-consumer aerosols can be efficiently recycled with other packaging materials. Large quantities of empty aerosols are already recycled successfully across Europe and globally.



The current focus is on the calculation of the **Recyclability Performance Grades**. The current mass-ratio approach could inadvertently exclude smaller and more innovative aerosol products, despite their lower carbon footprint and their proven recyclability within existing waste management systems.

FEA actively contributes to the work related to packaging Design for Recycling launched at the level of the European standardisation body CEN, helping the implementation of the Packaging & Packaging Waste Regulation (PPWR). The ambitious timetable has resulted in an exceptionally demanding workload for the development of Design for Recycling criteria across all packaging materials.

→ Concerning the **waste sorting labels (WSL)**, the adoption of the implementing act is expected for end 2026. This will serve as an important test case for achieving a genuinely harmonised Single Market for packaging within the European Union.

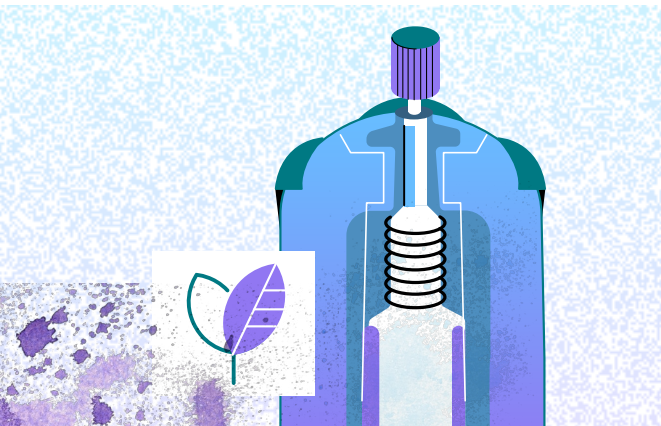
The industry expects a WSL based on a matching principle and pictograms, supportive of packaging minimisation and separate collection, clear for consumers while flexible for operators, and not subject to prescriptive requirements on colour, text, size, or spacing that add burden.

FEA also launched **trials to demonstrate the separability of aerosol caps** in the context of the PPWR.

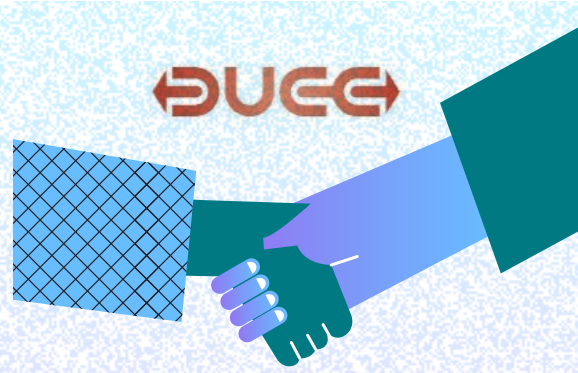
→ Beyond the EC PPWR guidance and FAQ, FEA develops dedicated **briefing papers** to help the aerosol industry.

FEA develops a new briefing paper to further support the implementation of the **F-gases III Regulation**.

More than 3,500 comments were submitted during the 60-day consultation on the draft opinion of ECHA's Committee for Socio-Economic Analysis (SEAC) on the **'universal' per- and polyfluoroalkyl substances (PFAS)** restriction. SEAC is now assessing the contributions and is expected to adopt its final opinion by end 2026.



HFO-1234ze is the sole remaining non-flammable liquefied gas propellant available to the aerosol industry. It is used in the formulation of certain non-flammable technical products when an ignition source is present during use while high performance is needed. FEA has advocated for the explicit recognition of signal horns, which play an essential safety function in a variety of places and critical situations.



FEA continues its involvement with the Downstream Users of Chemicals Co-ordination Group (DUCC), contributing to the EU Chemicals Strategy for Sustainability and implementation of REACH and CLP.

- The European Commission indicated that the planned broad revision of the **REACH Regulation** will not be pursued at this stage. Rather than pursuing a comprehensive revision, the European Commission is expected to introduce a series of targeted measures through comitology procedures.

That means addressing the uneven playing field for industry and simplifying overly complicated processes, while ensuring people are protected from harmful substances like endocrine disruptors and PFAS.

- The **UNECE Convention on Long-range Transboundary Air Pollution** is revisiting the Gothenburg Protocol, and the European Commission is preparing the next revision of the National Emission reduction Commitments Directive (NECD) (EU) 2016/2284.

A directive on substantiating and communicating explicit environmental claims ('green claims directive') is frozen since June 2025 but not withdrawn.

Constantly evolving regulatory, environmental and market expectations continue to present both challenges and opportunities. Through collaboration, technical excellence and constructive engagement with policymakers, the aerosol industry will continue to leverage its collective expertise to navigate these developments successfully.



We extend our sincere thanks to all Steering Committee members for their expertise, commitment and constructive contributions throughout the year, as well as to the Board of Directors for its continued guidance and support. We also recognise the excellent work of the FEA Secretariat.

Finally, we are grateful to all member companies for enabling their experts to contribute their knowledge and experience. As our regulatory landscape becomes increasingly complex, it is equally important to encourage the participation of the next generation of specialists in FEA activities.

Ensuring the transfer of knowledge and attracting younger experts will be essential to maintaining the technical excellence, innovation and credibility on which our industry depends.

Together, we can continue to build a strong, resilient and future-oriented European aerosol sector.

National Association Network

A Vital Role



Jean Blottière
Chair of the Committee of National
Association Director (CNAD)

The **2026 ADF at Paris Packaging Week** was amazingly well attended, thanks to the efforts of FEA and the National Associations to make it attractive!

The **partnership between FEA and Easyfairs** is now well established and widely recognised within the industry. The 2026 edition was a great success, thanks to CNAD members who actively promoted ADF. Most members of the National Associations participated either as exhibitors or visitors, or as members of the jury for the Awards chaired by FEA Secretary General Alain D'haese. CNAD has supported FEA's sustainability!

Following a major threat to FEA's budget last year, the remaining FEA National Association members collectively worked out solutions to balance FEA's budget for this year and for the future. This has created financial challenges for National Associations, but the importance of FEA was so well understood that the effort was worthwhile. CNAD also supports initiatives aimed

at increasing FEA's income, such as sponsorship or the organisation of joint events. I cannot thank my colleagues enough for that enormous collective intelligence and effort.

Delivering value to members remains CNAD's core mission.

I must keep this in the 2026 report. It is copied and pasted from last year, but it is key. It remains the main mission, especially given the intense impact of the geopolitical crisis on our industry this year. Permanent staff continue to play a vital role in FEA's various Working Groups and Task Forces. However, based on the revamped efficiency of the WGs and TFs and on key subjects, we are pleased to see more companies within National Associations becoming active in these FEA groups. It is encouraging and creates opportunities for companies to bring their expertise.



CNAD reviewed FEA's priority list twice last year, and certain key topics motivated company members of National Associations to send representatives as industry experts. For me, this clearly demonstrates the value for money that FEA and the National Associations provide. The key industry priorities tackled at national level are the same as those addressed at European level by FEA.

Whether through training, information or influence, FEA is working on key subjects prioritised by CNAD:

- **Safety** is number one, whether industrial or product safety. It is an uncompromising priority. Our safety record represents the industry's credibility in the eyes of authorities.
- **The end of life of aerosol dispensers** is number two, particularly considering the Packaging & Packaging Waste Regulation (PPWR) as well as Design for Recycling standards. CNAD reports on national regulations or draft regulations with a view to enabling the Task Force to anticipate and harmonise certain FEA positions.
- **Reuse** is also being addressed. CNAD supports the work carried out by the Reuse Task Force. It is important to be prepared and to inform the industry of the regulatory hurdles that must be overcome in order to

place on the market and transport reusable 'aerosol-like' pressurised dispensers.

- Finally, CNAD relays at national level the **work carried out by FEA**. After reading this FEA annual report, we can appreciate just how considerable that work is!

Merci to all my colleagues!

Without their dedication and continued support, we would not achieve so much, and we would be driving blindly...

I would particularly like to thank Marek Bohatý and his team from the Czech Aerosol Association (ČAS). Marek was the first to volunteer to organise a joint ČAS–FEA event in Prague in October, making ČAS the first national association to embrace the new joint-meeting format agreed upon last year. I am pretty sure that it will be a success!

Connecting the Aerosol Community

Event Partnership

→ **Event Partnership: A win-win partnership for the aerosol industry**

Since 2023, FEA has partnered with Paris Packaging Week – ADF, the leading international event dedicated to aerosol and dispensing technologies. The exhibition brings together brand owners, fillers, suppliers and industry experts to explore innovation, sustainability and the latest developments affecting the global aerosol sector.

The Global Aerosol & Dispensing Summit provides a platform for dialogue on technical innovation, sustainability, product safety and evolving regulatory frameworks.

FEA's involvement reflects its commitment to promoting innovation and technical excellence. FEA Secretary General chairs the Jury of the ADF Innovation Awards, reinforcing FEA's role in recognising and encouraging technological progress across the sector.

This commitment is further demonstrated through two dedicated FEA awards:

1. FEA Aerosol Technology of the Year Award, recognising outstanding innovation and technical excellence in aerosol technology, and

2. FEA Startup of the Year Award, celebrating emerging companies bringing innovative products, technologies and services to the aerosol industry.

→ **Paris Packaging Week celebrates a record-breaking edition**

The 2026 edition of Paris Packaging Week marked the event's 25th anniversary and welcomed a record 14,442 visitors from 87 countries.

Within the event, ADF Paris once again served as the premier meeting place for the aerosol and dispensing technology sector, bringing together thousands of professionals for two days of networking, innovation and technical exchange. FEA's contribution was visible throughout the event through the Innovation Awards, conference programme and stakeholder engagement activities.

The partnership between FEA and Paris Packaging Week continues to grow stronger, helping to showcase industry achievements, facilitate dialogue and attract new talent to the aerosol sector.



↗ Photos by Easyfairs©

→ **Looking ahead to ADF Paris 2027**

The [next edition of ADF Paris](#) will take place on **3–4 February 2027** and promises another outstanding programme of exhibitions, conferences, networking opportunities and innovation awards.

We look forward to welcoming the aerosol community once again in Paris.



Facts & Figures

EU Aerosol Production remains stable

EU aerosol production reached 3.45 billion units in 2025. Overall, production has remained stable over the last five years, increasing from 3.27 to 3.45 billion units (1.4% CAGR).

Germany, France and Italy account for over 60% of EU's annual aerosol production across all segments. In collaboration with the Netherlands and Spain, they collectively produced more than 2.9 billion aerosol dispensers in 2025.

Aerosol containers are primarily made of steel and aluminium, whereas glass and plastic containers remain marginal. **Cosmetics and household products represent two-thirds of the EU aerosol production.**

Fig. 1 EU aerosol production evolution (2015–2025, in '000 000 units)

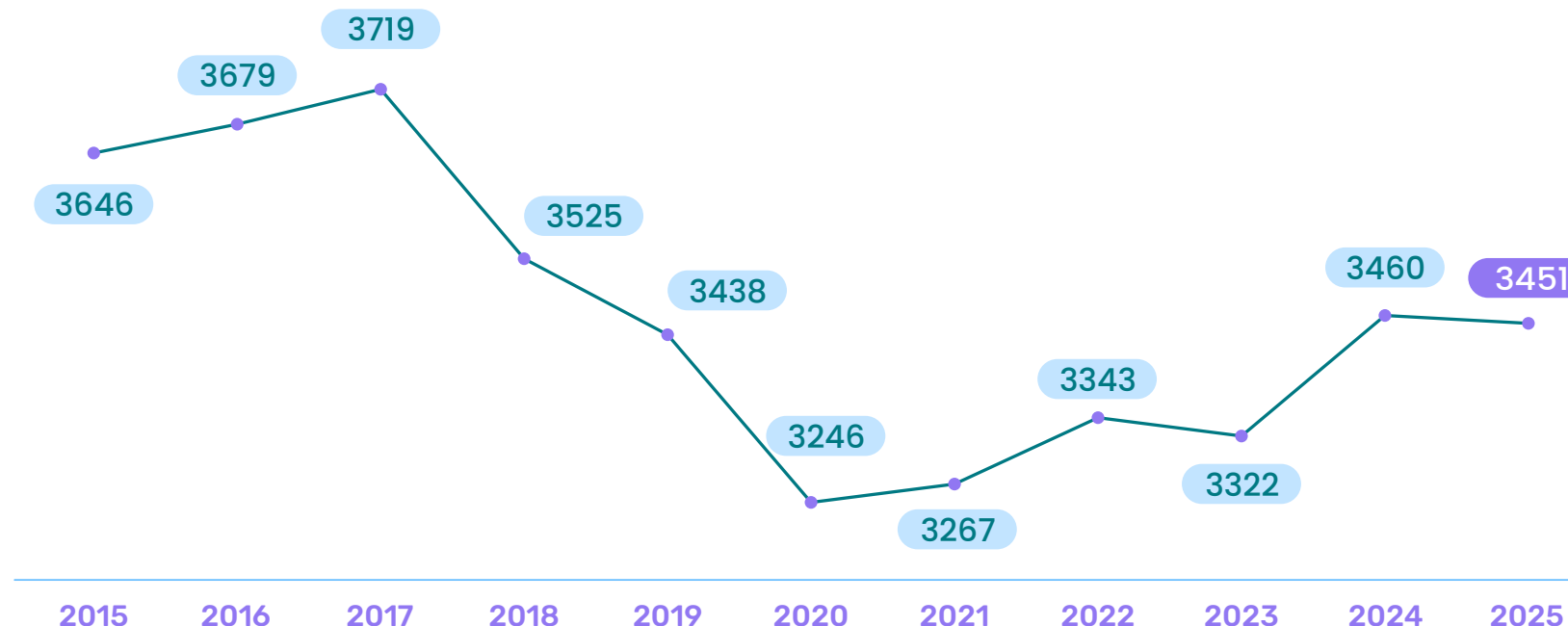


Fig. 2 EU aerosol production (2025, main countries, in '000 000 units)

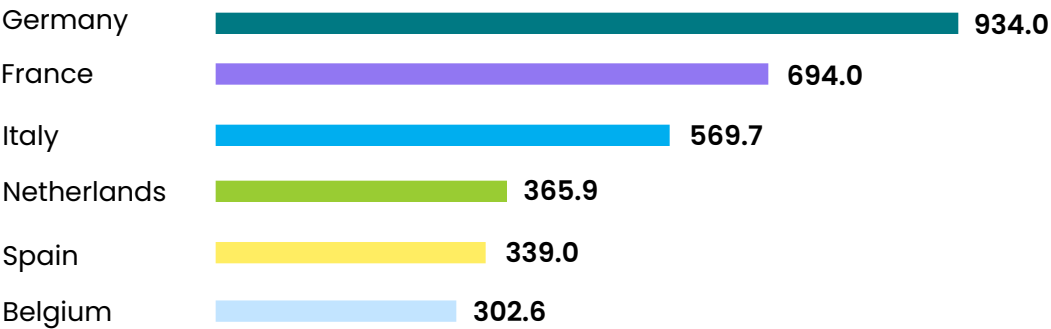


Fig. 3 EU aerosol production (2025, share by country)

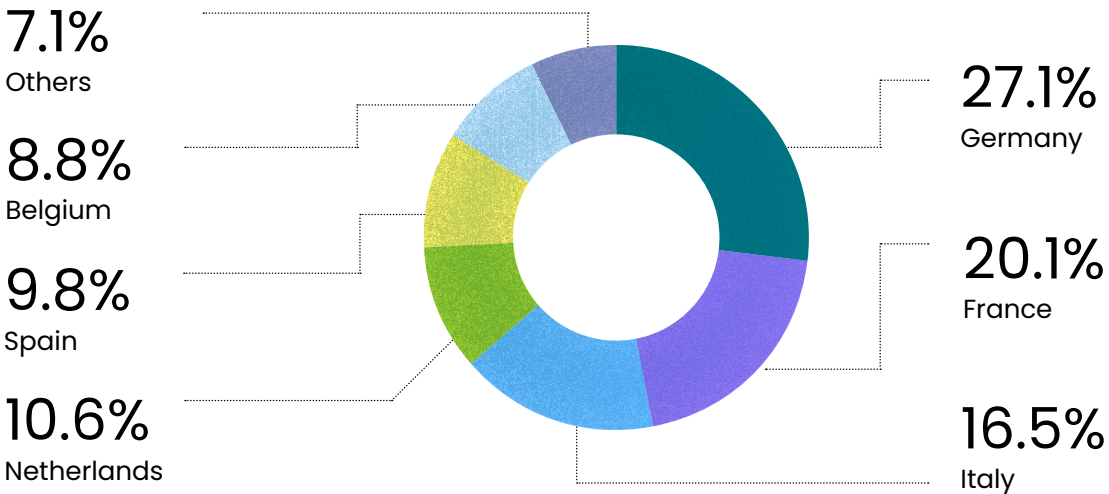


Fig. 4 Aerosol EU production by segment (2025)

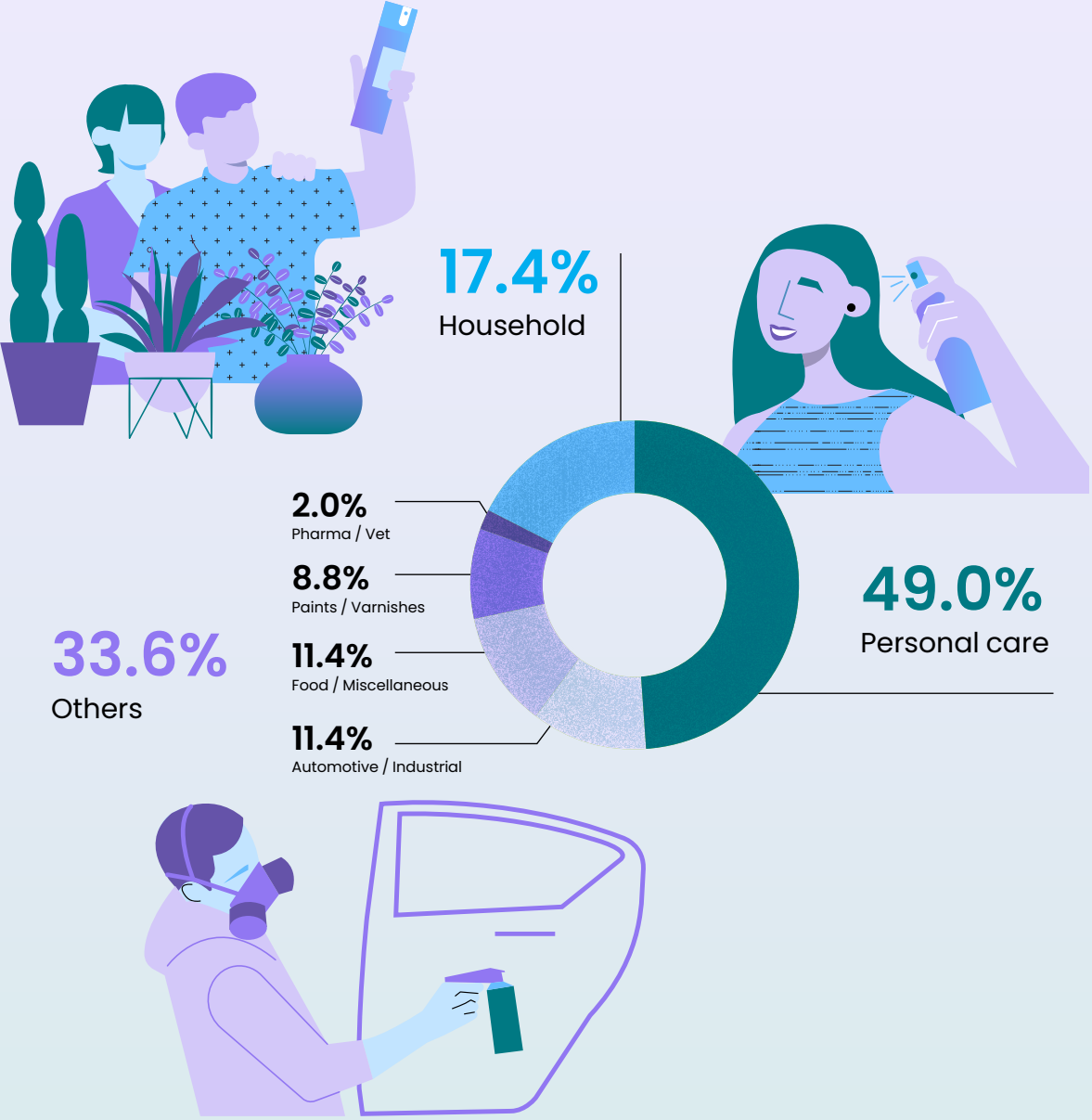
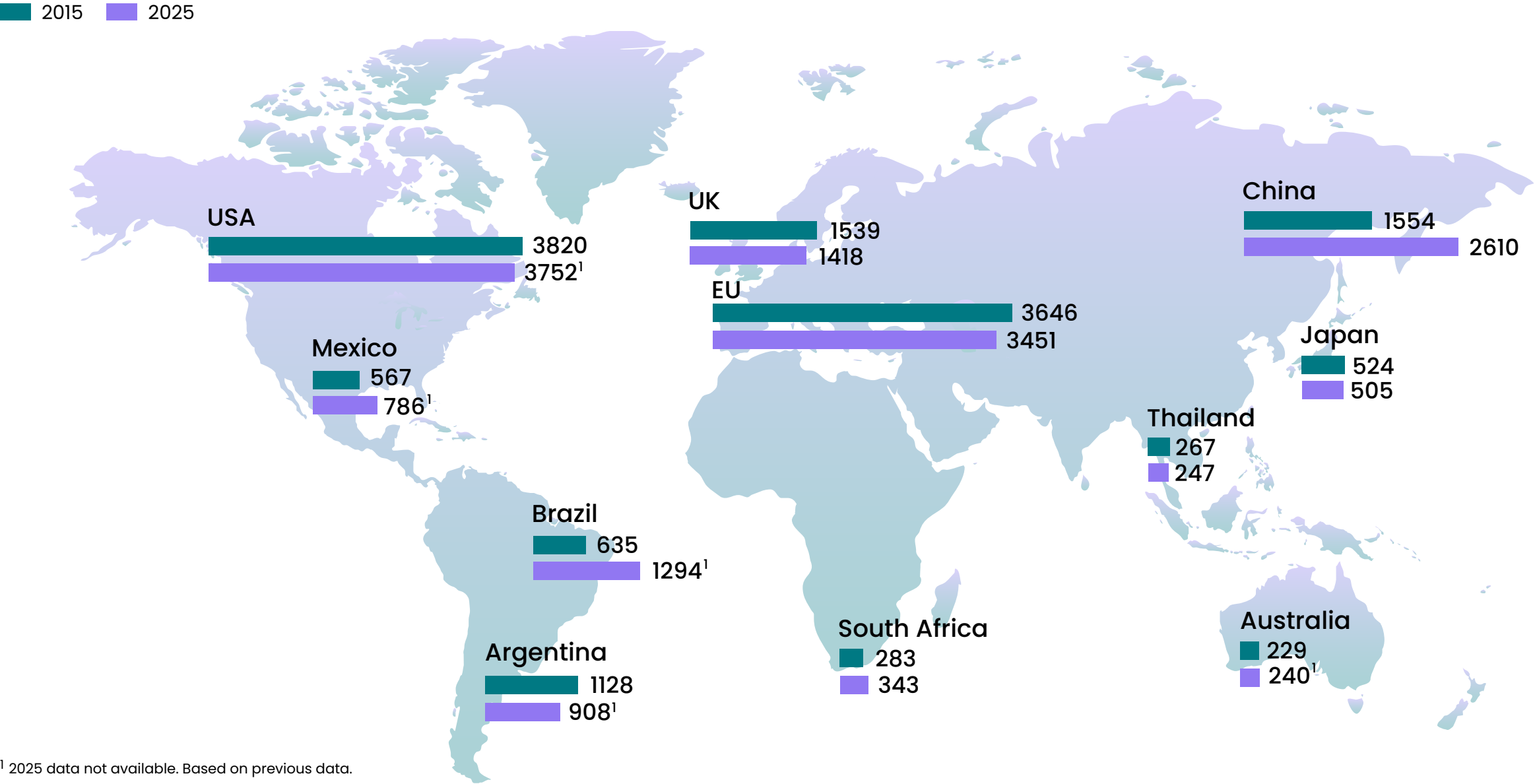


Fig. 5 Aerosol worldwide production (in '000 000 units)

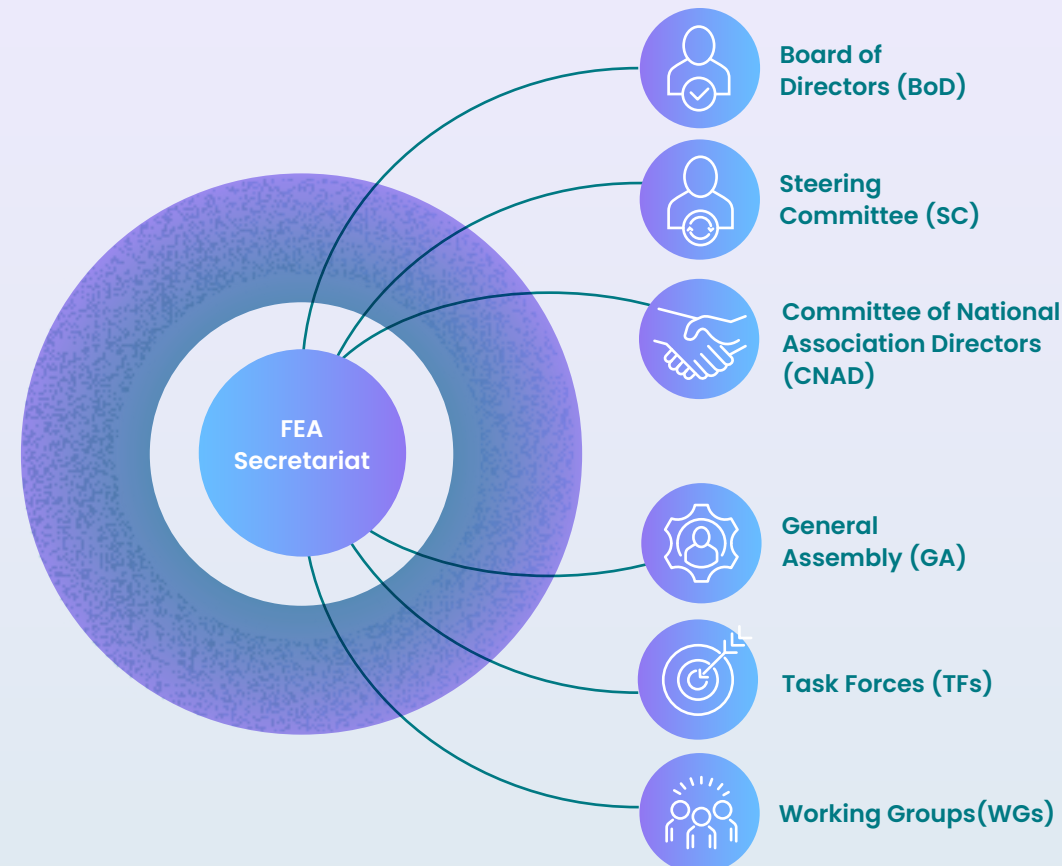


Governance & Membership

A strong and connected organisation

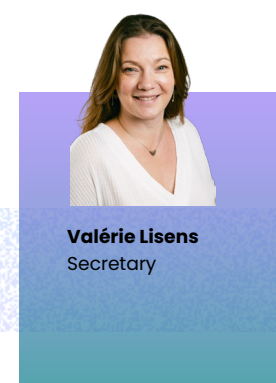
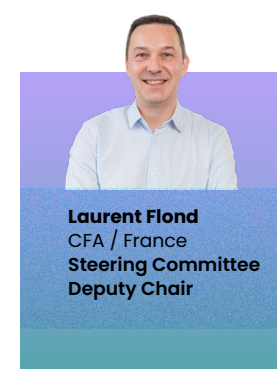
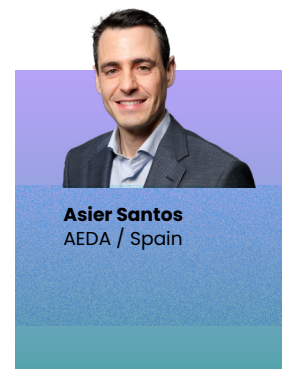
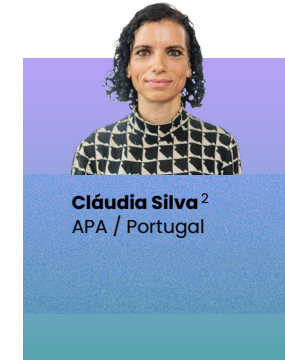
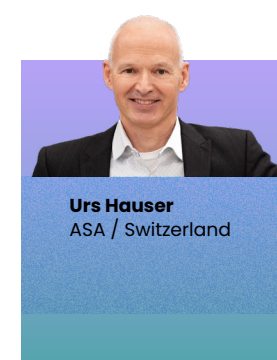
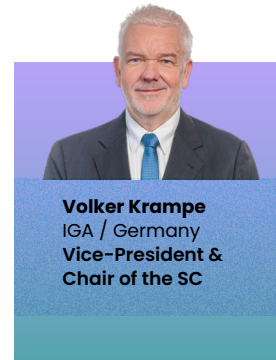
Since its founding in 1959, the European Aerosol Federation (FEA) has worked to promote and support the aerosol industry in Europe.

- At the heart of FEA's daily activity is the **Secretariat**, which ensures the smooth running of operations and provides essential support to members, working behind the scenes to keep the Federation active and responsive.
- Guiding this work is the **General Assembly**, FEA's **highest decision-making** body. It plays a key role in shaping the future of the Federation by approving changes to the constitution and confirming its long-term goals and direction.
- These strategic objectives are developed by the **Board of Directors**, the **executive leadership** that not only sets the course for the Federation but also makes important decisions that fall outside the scope of the General Assembly.
- To turn strategy into action, the **Steering Committee** takes the lead in implementing the Federation's work programme. It ensures that activities align with the vision set by the Board and endorsed by the General Assembly, helping to deliver real results across the aerosol industry.



Leadership Team

Board of Directors & Secretariat



FEA Secretariat

² Until 15 December 2025.

Membership Network

FEA gives its members a strong, united voice at national, EU, and international levels, helping shape policies and promote the aerosol industry's interests.

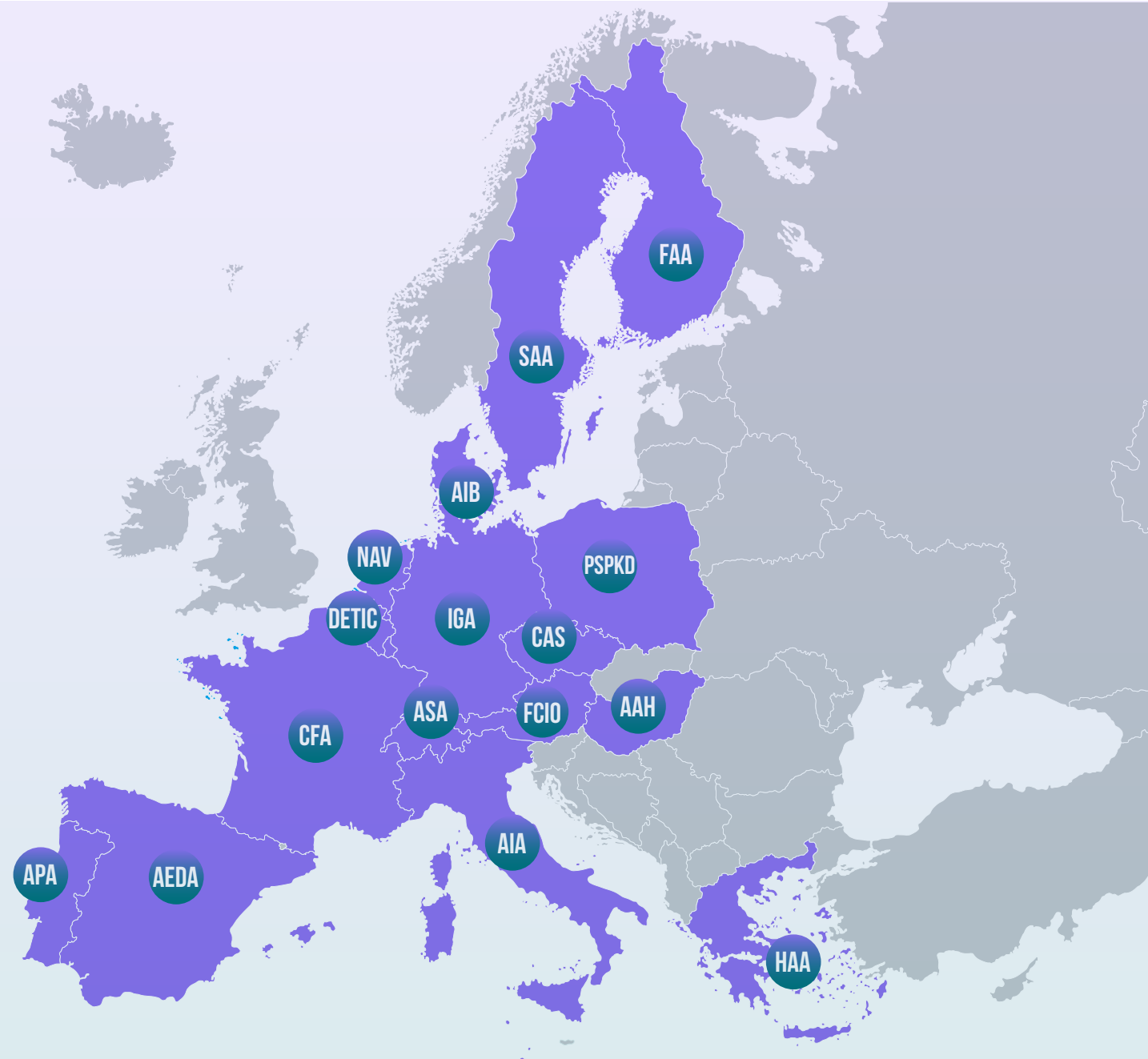
Through expert working groups, and constant monitoring of legislation, we keep members informed, engaged, and protected. Members benefit from access to specialised knowledge, invitations to key industry events, and valuable networking opportunities across the aerosol value chain. Together, we advance the industry through collaboration, advocacy, and shared expertise.

17

European countries,
which include

+300

small and medium-sized enterprises
(SMEs) and multinationals active in
the aerosol dispenser industry



Full Members

Austria / FCIO – Fachverband Der Chemischen Industrie Österreichs

 fcio.at

Belgium / DETIC – Association belgo-luxembourgeoise des producteurs et des distributeurs de cosmétiques, détergents, produits d'entretien, colles et mastics, biocides et aérosols

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