

Metal Aerosol Cans Reliant On Narrow End Use Markets

Contributed by Euromonitor International
 Tuesday, 24 August 2010
 Last Updated Wednesday, 25 August 2010

Retail metal aerosol can sales are shaped by deodorants, air fresheners, insecticides and styling agents; these four product applications alone amounted to 70% of global retail aerosol market share in 2009.

Expanded aerosol take-up is evident with the affordability and functionality attributes of the metal aerosol can creating growth in Air and Sun Care in developed North America and Europe.

Further, the aerosol's premium, added-value nature will continue to propel sales amongst a fast-developing consumer base in Asia Pacific and Latin America.

Summary:

- * Trading down in air care and insecticides creates aerosol growth in developed regions
- * Fast growing Asia Pacific and Latin America hold greatest opportunities for aerosol gains
- * Deodorants lead global aerosol sales in 2009
- * Format competition important in deodorants, air fresheners and insecticides
- * Innovation and functionality are key to success in niche categories

Some gains made despite weakened economic climate

The economic downturn weakened packaging growth across the retail marketplace in 2009 as consumers' purse strings were tightened. However some positives in key categories were still gleaned for aerosols.

In air care and insecticides, trading down has generated renewed interest in developed regional markets where added-value electric variants had been making headway.

In deodorants, body sprays in metal aerosol cans as an alternative to fragrances in glass bottles fared well, particularly in the UK.

Economic stability is returning along with consumer confidence in 2010.

Fast developing nations drive global growth

In contrast, trading up to aerosols ensues in Asia Pacific and Latin America as consumer wealth and purchasing power strengthen.

Increasing urbanisation in Asia and a growing middle class alongside better living conditions amongst low-income earners sees demand for aerosol repellents on the up to the detriment of more traditional formats of insecticide coils, baits and other insecticides.

Meanwhile, trading up from pump to aerosol deodorant formats in Brazil in part serves to secure strong, continued aerosol growth in Latin America. Deodorants, number 1 aerosol application, exhibit differing regional trends. Deodorant sprays, the global leading product application for the metal aerosol can is overwhelmingly led by Western European requirements that amount to 46% of global aerosol deodorant sales.

A comparatively weaker regional position is apparent in North America where a consumer preference for stick deodorants is far more entrenched though efforts to diversify aerosol spray product ranges is paying some dividends, notably in male-specific body sprays.

It is however Latin America's sales of spray deodorants that are set to offer aerosol manufacturers most buoyant prospects through aerosol volume gains of 4% CAGR over 2009-2013, supported by the strong position of aerosol spray deodorants in countries like Brazil where sprays are frequently used for fragrance.

Eastern Europe remains a difficult region for deodorants in aerosol cans, challenged by consumer preference for roll-ons and weakened Russian buying power whilst Asia Pacific countries though ranking amongst the lowest per capita users of deodorant are showing positive development, led by China and India.

Functionality important to counter format competition

Deodorant and air fresheners will continue to headline aerosol sales growth to 2013.

Differentiation and innovation through product content and function in deodorants and air care is rife amongst brand owners and will serve to grow aerosol demand further.

Increased entertaining at home will bode well for home fragrance and air care products where the lower retail price point of spray/aerosol air fresheners additionally proves appealing in some large developed markets like the US.

In deodorants, skin-friendly formulations designed for sensitive skin and functional, for instance "scent-free" launches alongside an expanded range of fragrances are amongst just some of the developments employed to grow aerosol deodorant sales.

This strategy of answering differing consumer needs will be a continuing theme with "natural" and "green" products/packaging gaining in importance.

Aerosol efficacy and efficiency is additionally opening up demand in more niche product categories with sun care a particular highlight to mention.

The dynamism of the overall sun care category driven by consumer awareness and concern over sun exposure has certainly fuelled demand.

For aerosols, the convenience and efficiency of application combined with the lightweight feel of an aerosol sun care spray compared to a lotion/cream format has enabled the aerosol to carve out market presence in sun protection and self-tanning product lines.

Initially limited to North America and expanding to Western Europe and beyond, good forecast growth is on offer to aerosol manufacturers in this expanding category.

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12 August 2010