

CEPE

ANNUAL REPORT 2015



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Dear Reader,

When in July the meetings season becomes slow for the CEPE staff it is time to write the articles for CEPE's annual report. Although working against a deadline gives some pressure it is at the same time for all of us who write their contribution also an encouragement to see how much has been done in the year past. On average the CEPE staff organizes anywhere between 80 to 100 meetings per year and through the constructive involvement of the participants in those meetings we are able to report the progress as laid down in this annual report.

THE EU MARKET

2014 was a relative positive year for the paint industry. Most EU countries saw a positive trend in volume (2 to 4 %) across nearly every paint sector. The first signs for 2015 do show a positive trend. Printing inks volumes saw a levelling off in the negative growth over the last 3 years (- 1.2%).

SUSTAINABILITY IN THE PAINT INDUSTRY

Most of the work in this area has moved to the specifics of Life Cycle Analysis per paint sector. The pilot project facilitated by the EU Commission called Product Environmental Footprint (PEF) for Decorative products is progressing well but it has to be admitted that it draws quite some resources of both CEPE members and CEPE staff. It is considered a key project while it may impact the way our industry in future will sell Deco paints with a sustainability rating. After the protective coatings group finished last year its first Life Cycle Analysis on the use of paints in bridge maintenance, we have this year run a screening LCA for powder on aluminum outdoor frames. The EU Commission is meanwhile discussing the topic of the Circular Economy and this may well need addressing by CEPE in the year to come.

LEGISLATIVE IMPACTS

Handling these issues for our members is one of the main reasons for CEPE's existence. No wonder that this annual report is mainly made up with these topics. With many authorities nowadays *evaluating dossiers of substances or biocides* our industry has to constantly be on the alert when this relates to the ingredients we use for the manufacture of our products. Most often in small time windows we have to respond to questions on use and handling in our industry.



Since June 1 the CLP regulation is in force. The transfer to the pictograms and phrases has been well facilitated by our 'labeling group'. The way in which we *communicate on the hazards of our products* (exposure scenarios under REACH) makes also good progress.

PROJECTS

A highly valuable project I like to mention here. With funding from the Special Issue Fund CEPE assigned a consultant to run a Europe wide survey with consumers on their consumption and use frequency of decorative paints. In total 7,500 consumers responded.

With these results CEPE needs no longer to just accept default values for exposure determinants.

EDUCATION

'Attracting the next generation of paint or ink chemists' will continue to draw our attention. After the first 9 students were sponsored in 2014 for the English Master Programme at ITECH, Lyon, we are happy to see that another group is applying for the 2015 course and compete for a number of scholarships that some of the paint companies will fund.

I wish you pleasure in taking notice of this annual report.

A handwritten signature in black ink, appearing to read "Jan van der Meulen".

Jan van der Meulen,
Managing Director CEPE

PHOTOS

C.1 eternalcreative - istockphoto.com
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Reason to ACT

CEPE is an industry association that offers the legal platform for its members to meet and to discuss industry issues

The typical issues that require a collective industry approach, often originate from areas such as:

- » Upcoming or existing legislation on safety, health and the environment (chemicals, emissions, labelling, transport etc.)
- » Unsatisfactory situations in the industry concerning the position or the image of the whole sector.

Efforts that are undertaken can be reactive or pro-active to these issues.

The benefits from the collective efforts are meant for those that have joined the CEPE membership.

THE INDUSTRY TO SPEAK UP

To deliver „One message“

CEPE or EuPIA represent the interests of its members at:

- » the EU Commission or Parliament or the delegated EU institutes.
- » the EU industry associations that are relevant for the supply chain.
- » the UN (directly or via its membership in the International Paint and Printing Ink Council -IPPIIC).

CEPE FUNCTIONS AND ASSIGNED WORKING GROUPS

CEPE FUNCTION

ADDRESSED PER CEPE WORKING GROUPS



- » Monitoring upcoming issues (radar for industry)
- » Advising for issue - treatment

- » SHE Advisory Board (SHEAB) SHE topics (approx. 25)
- » Toxicology Advisory substance (raw material) specific topics (approx.40)

- » Preparation (of proposals)
- » Consultation of members not participating in WG

- » Issue related Task Force in case of industry wide issues
- » EU Sector Group when sector specific action is required

- » Propagation and feed back

- » Platforms of Directors or staff members of NAs + CEPE

SUSTAINABILITY

LCI PROJECT UPDATE

Background

CEPE published its Life Cycle Inventory database together with the CEPE Ecofootprint tool in July 2013, and updated it in September 2014. Regular updates are planned to keep the database up to date, the next one being in 2015. The users of the tool and the database were consulted via a survey. Their feedback will be used as input for the update proposals.

What's been done so far, and what's the plan for the future?

The proposed updates will be discussed and evaluated for their technical feasibility, cost and priority level before being implemented. Here are the main ones. The database has already been updated once to complete it with raw materials like pigments, tap water, etc. Since then a number of missing materials have been flagged by CEPE members and will be investi-

gated and potentially integrated in the database.

Updates of the Ecofootprint tool could include the addition of after gate scenarios (the tool now stopping at the bucket of paint, not the applied coating), or a new output format. Finally, guidance documents could be prepared to explain better how to choose a proxy when a specific raw material is not included in the tool; to describe the uncertainty of sustainability results in general; and to detail what can be done with the Ecofootprint obtained from the CEPE tool.

LIFE CYCLE STUDIES OF PAINT APPLICATIONS

Background

The CEPE Life Cycle Inventory database and Ecofootprint tool are available since July 2013, covering the life cycle from the cradle (extraction of materials) to the factory gate (bucket of paint). Some CEPE paint sectors have used these deliverables

The CEPE Life Cycle Inventory database and Ecofootprint tool are available since July 2013

since to investigate the full life cycle of a typical application of paint from a sustainability perspective.

What's been done so far, and what's the plan for the future?

The protective coatings sector has studied the role of paint in the life cycle of a steel bridge. The results of the study were presented at the CEPE Annual Conference in 2014. The Sector Group will now convert the outcomes of the study into an easy to understand leaflet, and use it for publications and to inform decision makers for green procurement. The full life cycle of decorative paints is investigated in the 3 year long PEF project (see below). Additionally, in 2015, the powder coatings sector has studied the life cycle of aluminium window frames (see the powder coating section for more details). These successful sectorial studies are inspiring other sectors as well: the coil coatings group in designing a study looking at a coil-coated steel outdoor façade cladding, and discussions have also started in the vehicle refinishes sector.

BIO-BASED PRODUCTS

Background

Bio-based materials are already in use in the paint industry (for example vegetable oil based alkyd resins), and many of the raw materials



we currently use could become bio-based in the future (solvents, binders etc.).

What's been done so far, and what's the plan for the future?

Since 2012, CEPE is monitoring closely bio-based activities by being involved in standardisation activities, and being represented at conferences like the plant-based summit. CEPE is involved in CEN TC 411 (bio-based materials) which is a horizontal working group developing standards for terminology, determination of bio-based content, or how to describe the sustainability of a bio-based product. A vertical standard for bio-based solvents is also developed by the committee. CEPE also participates in an EU funded R&D project for using biomass as starting material for solvents in paints (ECOBIOFOR) www.ecobiofor.eu

PRODUCT ENVIRONMENTAL FOOTPRINT PROJECT

Background

The PEF methodology has been developed by the European Commission based on existing life cycle assessment methods, aiming at harmonizing them and increasing comparability between products of the same category by decreasing the flexibility of these methods, like ISO 14044. If it proves successful, the methodologies could be used by the European Commission for policy making, first in voluntary initiatives like the Ecolabel, then if the conditions are met, in mandatory policy. Two of the pilots' objectives are to develop product environmental footprint category rules (PEFCR), thus testing the applicability of the PEF methodology, and test different communication vehicles, covering



both business to business and business to consumer trade. These objectives are similar to the additional work the decorative coatings group wanted to tackle, which is the reason why CEPE has applied to be a part of this pilot.

What's been done so far, and what's the plan for the future?

This 3 year project, started in November 2013, is making good progress. A very detailed screening study has been conducted, analysing all possible parameters that can influence the sustainability of the decorative coatings supply chain. Assumptions for a typical paint job; standard transport distances; or even rates of paint loss across the distribution stage have been defined. One

crucial point was to build a scheme to determine the durability of paints for environmental calculations: technical properties were used as proxies to create quality levels, and these levels were associated to an average durability in years based on feedback received from decorative paints manufacturers.

The identification of hotspots helps focus on environmental issues that really matter.

Parallel to that, calculation rules (the so called Product Environmental Footprint Category Rules – PEFCR) have been written by CEPE. PEFCRs are stricter than regular calculation rules to ensure comparability of the footprints of different products in the end.

The next steps will be to test the calculation rules on real products, and confirm the findings of the screening study.

From a communication perspective, different “communication vehicles” will be studied, like labels or environmental product declarations. All the decorative paint stakeholders will be included in this stage: professional painters and consumers, distributors, and specifiers like construction groups or architects.

The next steps will be to test the calculation rules on real products, and confirm the findings of the screening study.

Paint formula STEWARDSHIP

A CEPE programme to ensure the highest safety for the selection and use of substances in paint formulations

Why such programme?

The main reason for this programme is to act in a proactive way which will help support key substances under REACH and give our industry more time and better options to adapt to changes that are imminent. It is also in line with CEPE's Sustainability Charter which stimulates the search for safe solutions for people and environment.

A first draft of this programme was proposed last year in which only the elimination of adversely classified substances was included. The new version allows also for continuation to use an ingredient as long as a Chemical Safety Analysis has been carried out and demonstrates how a safe use can be guaranteed.

Which substances are affected by this programme?

In any case the substances with a classification of CMR 1, PBT or vPvB will be addressed. Other substances of interest will be reviewed. Indeed, the classification of a substance does not tell about the risk it may present. The classification only tells about a potential to make an effect.

Other substances may have a less stringent classification but may sometimes present an unacceptable risk. It is the dose that makes the poison.

CEPE maintains a list of 'Substances of Interest' which contains at present over 270 substances that require monitoring of EU activities which could affect our industry (classification, registration,

evaluation, authorization, restriction etc.). The substances that will be selected will come from that list.

What's in it for the CEPE members?

Just reacting to the obligations on substances that come under REACH would leave our industry with little time for making adaptations. Substituting substances in paint formulations may face sometimes lengthy approval periods. By being pro-active we create time for such changes.

Where we cannot substitute we have to come to robust risk management implementations which will give us a better chance with authorities to maintain the use of the substance, and if this is not possible negotiate an acceptable route of 'restrictions' rather than being forced to accept the authorization of the substance. We can better live with a 'restriction in use' than an authorization for such substances.

Who plays what role in this programme?

With now allowing for a 'risk based option' it is very important that

our industry does a thorough job on checking the parameters in the CSAs (Chemical Safety Assessments). For this purpose CEPE has set up a new Working Group that will analyze the Risk Assessments of the relevant substances. CEPE experts will form a new Substance Risk Analysis Group (SubRAG). CEPE's paint sector groups will in consultation with the SubRAG decide on:

- » the priority of a substance to be addressed
- » the horizon date when a substance has to be phased out of the paint industry in Europe
- » the implementation date for the Risk Management Measures for a substance that can continue to be used.

The individual CEPE member should follow the communications of CEPE or of the National Associations on the substances that the SubRAG is about to evaluate or which have recently been evaluated.

The CEPE member is expected to follow the guidance of the SubRAG for either substitution or for implementation of risk measures. And finally the CEPE member is to respond to the survey the national association will run to measure the progress of this policy.

What will be the next steps?

The 2nd version of this proposed programme will be made available for consultation of the CEPE members.

Comments and questions will be addressed by the SHE Advisory Board of CEPE. Hereafter it would be proposed at the CEPE General Assembly for a final vote by the membership.

Adoption would then mean that the programme effectively starts by October 2016.



REACH

Evaluation and Authorization: why should we track these regulatory activities?

Background

REACH is the biggest piece of legislation that the EU Parliament has ever developed. The burden of proof of safe use has been placed on Industry and the first action was to register substances by submitting adequate toxicological dossiers to identify the effects and exposures through the entire supply chain. The responsibility of such action rests on the shoulders of the EU manufacturers and/or EU importers and our sector is mainly a downstream user under these rules. Hence we count on our suppliers to do their job and support all our uses. The first two registration deadlines covered the highest volume chemicals or those with most adverse known classification and the third and last step is the 2018 submission for many other substances. However this is not it, a lot of activities from Authorities have started and have captured our attention as they may influence our future.

What is the issue?

It is a difficult task for our suppliers to cover all our needs and it is the analysis of their extended safety data sheets (e-SDS) containing a Chemical Safety Report (CSR) that gives us the adequate information

on acceptable uses and the possible need of risk mitigation measures. Authorities have on their side started to check the quality of dossiers and have asked for improvement. They have also started to evaluate dossiers in detail for a number of substances under the community rolling action plan (CoRAP) and they have started to identify all substances of very high concern under their SVHC 2020 roadmap. These activities may lead to problems for the continued use of substances in coatings and inks.

What is CEPE's opinion?

CEPE believes that we have to monitor substances of interest and act where appropriate. Indeed, out of the current 267 substances under CoRAP, CEPE has interest in over 100. The reason for an Authority to propose a substance for evaluation is that they have a concern (CMR, PBT, ED, High volume, High exposure etc.). Hence our own concern. The current status of the first 36 substances evaluated under the CoRAP 2012 list shows that most dossiers have gaps and Authorities have requested additional information (on toxicological and environmental effects, on exposure etc.). This is also confirmed for the 2013

list (47 chemicals). The outcome of an evaluation could be that the risk is adequately covered and the substance can stay on the market without further regulatory measure, or on the other hand it can lead to new adverse classification, to restriction of use or to authorization. The latter is certainly what industry does not want as it is an actual ban, even though application for authorizations may allow some additional years of use.

What has CEPE done so far?

CEPE has raised the attention of its members on these developments. Together with the input of members' experts we built a list of substances of interest and provide regular updates when new facts become available (see table below). We then regularly provided input to external parties who needed to understand the importance of the use of some substances in our sectors for REACH purposes. We also participated in public consultations to raise attention of regulators. When further input is required we may create dedicated groups to defend specific substances such as for the di-isocyanates and for formaldehyde.

› This list is the basis for monitoring.

Substances	CEPE Total	Artist color TC	Can SG	Deco TC	Ink Eupia (TC)	Marine TC	Powder coatings	Protective TC	ToxAG	Vehicle Ref SG
of interest	287	28	149	112	98	124	49	108	44	64
Among which on CoRAP	117	9	67	52	53	52	24	55	22	31

What will CEPE do as next steps?

Given the detailed examination of substances by Authorities only really started recently under REACH and are forecasted to last for many years, CEPE will continue to centralize information and communicate to its members as well as to external parties wherever our interests can be defended. Dedicated groups will be created on a case by case basis.

THE CSR/ES ROADMAP

An ambitious cross-stakeholder action plan to improve the quality of information used in Chemical Safety Reports and in Exposure Scenarios communicated along the supply chain.

Background

ECHA published the 'Chemical Safety Report/Exposure Scenario Roadmap' in 2013 to address shortfalls and improvement needs in the information used by registrants to assess their substances, and in the infor-

mation communicated downstream in the form of Exposure Scenarios. At time of writing the roadmap comprises a total of 22 different actions, of which 19 are actively running in 2015, grouped under the following main action areas:

1. Increase common understanding among stakeholders
2. Information inputs for the Chemical Safety Assessment
3. IT tools and standardisation
4. Support to formulators
5. Support to end-users

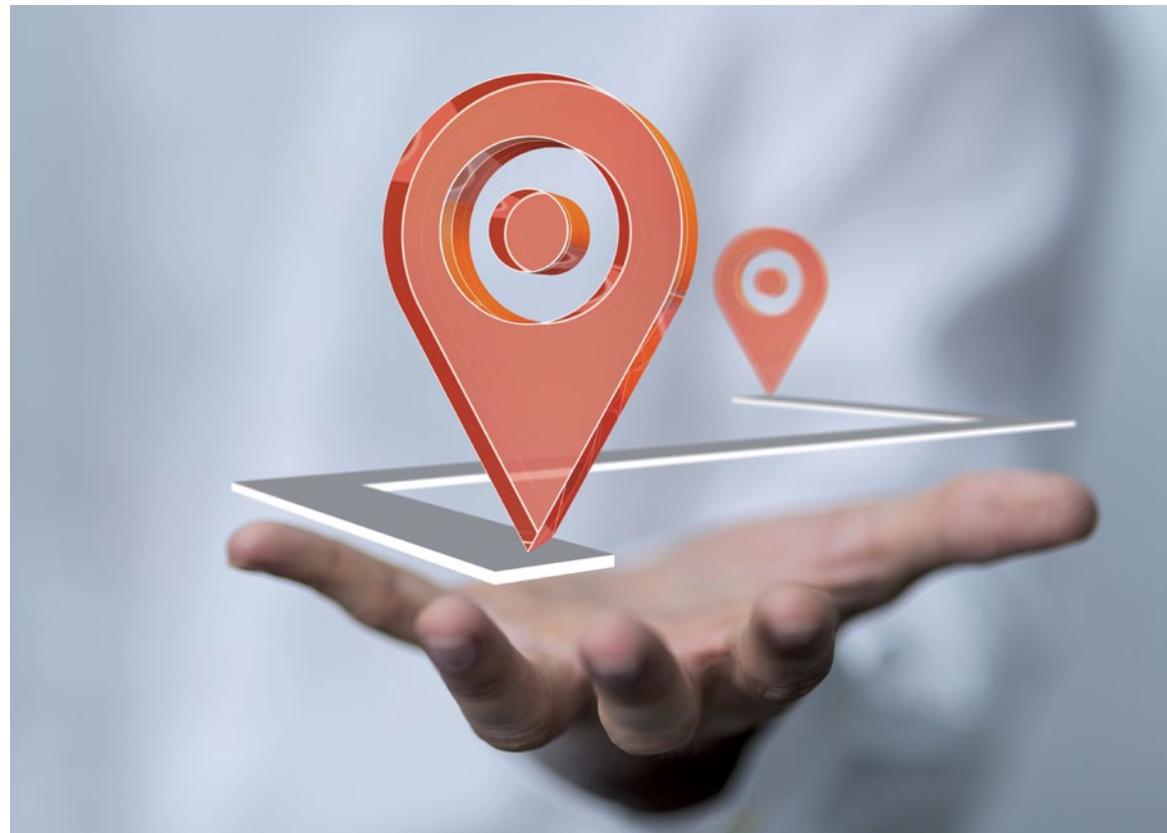
What is the main issue or interest for CEPE?

As a downstream user (DU) organisation there is some relevance or interest for CEPE in all of the above action areas, but its working groups currently need to have most active involvement in area 2 (concerning description of downstream uses) and area 4. For the latter see 'Safe Use Information for Mixtures' below.

What has CEPE done so far?

In the early days of REACH CEPE had already established 'use maps' describing the manufacture and application of paints, printing inks and artists' colours. Alongside these are the CEPE SpERCs (Specific Environmental Release Categories) providing more realistic estimates of emissions to the environment during production or use of coatings/inks. The use maps are now being refined by the addition of SCEDs (Specific Consumer Exposure Determinants), being developed with the aid of data gathered through CEPE's consumer survey (see Decorative Coatings article).

CEPE has also participated in the development of the ESCoM electronic data transmission standard and its associated phrase library, and in the standardisation of formats for ES communication including rules for short titles. Furthermore CEPE has contributed to the development



› The Roadmap ensures all information is accurately communicated

Define relevant uses of mixture (SWEDs)

CEPE



Define applicability domain

CEPE



Validate: check incoming substance SDS

COMPANY



Select and send output (SUMI)

COMPANY

or revision of ECHA guidance on the options for downstream users, and on DU Chemical Safety Assessment in cases where the formulator does not comply with the ES received from his supplier.

What will CEPE do as next steps?

In the coming months use maps will be further refined and completed by the inclusion of SWEDs (Sector-specific Worker Exposure Descriptions), originally developed as part of the mixtures project below. The CEPE SpERCs will be reviewed against a 'best practice' report and potentially re-structured or updated. In 2016 the whole package of exposure assessment inputs for workers, consumers and the environment is due to be re-formatted as part of ECHA's project on 'improved use maps'; the goal is for this all to be in place by mid-2016, in time to be used by 2018 registrants.

CEPE will also continue to partici-

pate in discussions on 'scaling' of ES parameters by formulators, and on the simplification of DU CSA for cases where scaling cannot deliver compliance. The ultimate goal is of course to ensure the received ES information is appropriate, and thus minimise the need for scaling or DU CSA, by improving the information used by registrants in their dossiers, but this is a long-term iterative process and will not happen overnight.

SAFE USE INFORMATION FOR MIXTURES

Simple, clear information for end users and a standardized process for formulators

Background

Communication of exposure scenario information for workers can be complex for mixtures containing many substances. It can also be unhelpful to end users, who essentially only need to know the conditions under which the mixture can be safely used. Associations of formulating industries, working together as DUCC (the Downstream Users of Chemicals Coordination group), recognised that a "bottom-up" approach is appropriate for end-use mixtures with well-defined patterns of use, and can be standardised by each sector to cover the majority of worker uses for its products.

What is CEPE's approach?

A dedicated CEPE task force set out to define standardised professional and industrial uses of coatings and inks, based on known typical conditions and behaviours. These are the Sector-specific Worker Exposure Descriptions (SWEDs) also mentioned above. For each SWED there will be

a corresponding SUMI (Safe Use of Mixtures Information) document, which can be appended to (or optionally integrated into) the safety data sheet to communicate safe use conditions for the mixture according to REACH requirements.

Member companies will need to choose the appropriate SUMI(s) and check whether they are valid for their products by comparing the incoming substance information for their raw materials against the limits defined by CEPE and the Operating Conditions (OCs) and Risk Management Measures (RMMs) in the SWEDs. The CEPE SWEDs/SUMIs are not expected to cover all uses or products, but should simplify matters for a significant majority of members (see concept flowchart).

What has been done so far?

Seventeen SWEDs (13 for painting, 4 for printing) have been defined and validated by CEPE sector groups and national associations. The applicability domain for each SWED has been defined in terms of substance properties, and the corresponding SUMI documents have been prepared in line with an agreed DUCC template. At the time of writing the guidance document for members explaining how to apply the approach was under preparation.

What will CEPE do as next steps?

The approach will be launched to a pilot group of CEPE members in Q3 2015, to test that it works as expected and check that the guidance is easy to follow. Following completion of this pilot and any adjustments necessary, the approach is due to be launched to the whole CEPE membership by the end of 2015.

SUBSTANCES of interest

Specific activities on substances of interest

ISOCYANATES

What is the issue?

Isocyanates are respiratory sensitizers. This effect is considered to be a serious health effect that may in certain cases lead to death. Several Authorities want to regulate them much more strictly than today. Indeed, Poland reviewed under CoRAP 2012 the REACH Registration dossier of TDI and concluded that sufficient Risk Mitigation Measures were in place and no further regulatory action was needed. But Austria, Netherlands, Denmark and Germany are of a different opinion. The German Authorities have indicated their intention to propose a general restriction of products containing more than 0.1% of free di-isocyanates. This involves important substances like HDI, IPDI, MDI or TDI. Their intention is to propose a ban for use by consumers, and the need for an official training scheme for professional users. The issue has been taken seriously by industry because if it fails to reduce the number of new human

asthma cases by at least a factor of 2 within 5 years of implementation (currently 30 new cases/year in Germany), there could be another proposal to go to the Authorization route. This would severely impact several of our businesses as this chemistry is widely used.

What has CEPE done?

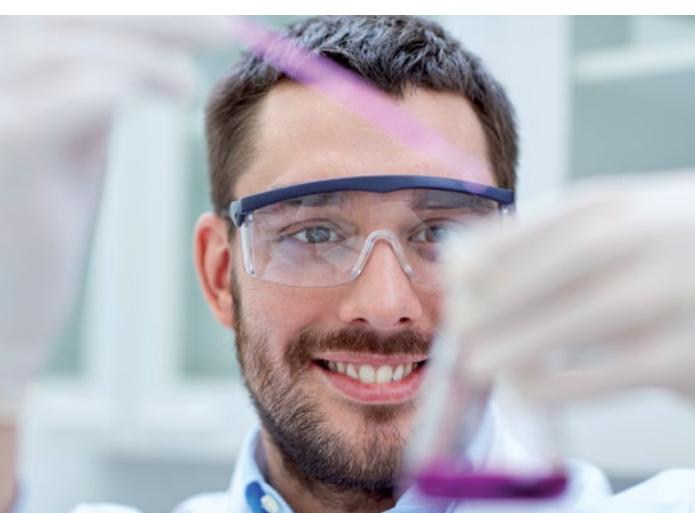
The manufacturers of this chemistry, through their EU associations ISOPA/ALIPA, approached downstream users a year ago to discuss the issue in common. CEPE immediately created a dedicated group with the Chairs of Can, Ink, Marine, Protective, Vehicle Refinish groups. Six calls were organized in the last year to contribute to the ISOPA/ALIPA developments.

What is CEPE's opinion so far?

CEPE understands the need to contribute in order to save this important chemistry in the long run. We are unsure that our uses lead to the health problems observed but we have no data to prove otherwise. It may be that the cases

of allergy predominantly come from the application of isolating PU foam by untrained professionals, but it may also be that professional users using protective coatings or vehicle refinish coatings do not properly follow the instructions given. All our sectors already have somehow a training scheme and/or appropriate recommendation for safe use. However, we cannot control how our customers use our products. This is the difficulty that REACH is imposing: the need to consider the entire supply chain. In that regard all industrial players are in the same boat under REACH. Hence we agree that additional appropriate risk mitigation measures may be needed. The ISOPA/ALIPA sub-group activities are divided into 'exemption' and 'training'. So far only Protective Coating identified the potential to get an exemption for one type of 2-pack HDI based coating where only the hardener contains more than 0.1% of free di-isocyanates, since the exposure is very limited to the dilution/mixing phase. For all other CEPE products we can accept a training scheme, but preferably in line with a scheme such as the Danish one (a one shot training done by an external Party) or even better when the products are only used in industrial facilities in line with existing internal company training.

› Several Authorities want to regulate isocyanates much more strictly than today



What will CEPE do as next steps?
CEPE will continue to be involved in the ISOPA/ALIPA discussions, together with our German VdL colleagues.

FORMALDEHYDE

What is the issue?

Formaldehyde has been re-classified as Carcinogen category 1, with official implementation deadline of 1 January 2016. This has several consequences on:

- » Re-classification of products or mixtures as Carc. 1 from 0.1% free formaldehyde
- » Customers perception with this change of label
- » Need to substitute under the safety at work legislation
- » Environmental permits under IED (Industrial Emission Directive)
- » Setting of OEL
- » Risk Management Option Analysis

What has CEPE done?

CEPE created a small group of interest and held a few calls in the past year. CEPE was also represented in Formacare meetings (the CEFIC group defending formaldehyde) involving downstream users.

What is CEPE's opinion so far?

Some CEPE sectors use melamine based formaldehyde that may contain more than 0.1% of free formaldehyde. Some products may be preserved with formaldehyde releaser biocides but never at concentration reaching 0.1%. Hence the impact seems to be restricted to some applications. However when a use is impacted the problem is not easy to solve as there is often no easy substitute.

The quantification of free formaldehyde should be done with acceptable methods but we have to rely on the information provided by resin suppliers as we cannot test each and every production batch of our own products. Batch averaging of observed

concentrations is not considered a way forward to avoid the 0.1% limit so there is a need to communicate on safe use of products containing formaldehyde when no substitute is available.

Under the IED the emission in the air of CMR solvents has a threshold which could be a problem for environmental permits. Although Formacare believes that formaldehyde does not fall into the definition of solvents the interpretation of our German colleagues from VdL took the position that the use of coatings dissolved in solvents is in scope and the emission limit values are not limited to solvents. Hence they will discuss with the relevant national Authorities the possibility to increase the national emission ceiling.

What will CEPE do as next steps?

France is deemed to finalize their RMOA (Risk Management Option Analysis) by the end of the year with the intention to take regulatory actions. CEPE will continue to be involved

in meetings with Formacare and support them wherever possible, in particular in their activities to avoid the REACH Authorization route.

HDDA

What is the issue?

Recently Sweden submitted on the ECHA webpage their intention to propose HDDA (hexamethylene diacrylate) as a candidate for SVHC (Substance of Very High Concern), which is the first step of REACH Authorization. This is based on skin sensitization considered as equivalent concern to CMR category 1. HDDA is used in several applications by CEPE members, mainly in UV curing inks and UV curing wood and protective coatings.

What is CEPE's opinion so far?

CEPE believes that this is an attempt from Sweden to stigmatize skin sensitizers and open the door to many other substances for adverse regulatory actions. CEPE believes that skin sensitizers are not of equivalent concern as CMRs category 1 and Member States should not by default consider them under Article 57(f) for taking them through the Authorization route. Rather a case by case evaluation is more appropriate. Therefore we have to react as early as possible to stop this process by demonstrating that it is not an issue that requires such regulatory action.

What has CEPE done?

A CEPE group agreed to react once the public consultation period starts in the summer 2015. A template to collect information was developed. CEPE is compiling and summarizing the input received for submission.



However when a use is impacted the problem is not easy to solve as there is often no easy substitute.

HAZARD communication



CLP: CLASSIFICATION, LABELLING & PACKAGING

The new system has arrived – but some questions still require answers

What has changed?

Following a multi-stage transition period that began back in 2009, the 'CLP' Regulation (EC) No. 1272/2008 has become fully applicable on 1 June 2015 and the old directives on dangerous substances and dangerous preparations have been repealed. As of 1 June 2015 all substances and mixtures placed on the market must be classified, labelled and packaged in accordance with CLP, which implements GHS in Europe. There are transitional provisions for mixtures already placed on the market before 1 June 2015, which can retain their old labels until 31 May 2017 at the latest.

What has CEPE done to help members with the transition?

This issue is handled in CEPE's Technical Committee 'Labelling and Safety Data Sheets' (TC-LSDS). In 2013 CEPE produced a short model communication which members could use to explain the changes to employees, customers or consumers. In October 2014, noting that many members were still unaware of the implications of the 1 June 2015 deadline for their production and stocks, CEPE published a guidance note for members (also openly available on the CEPE public website) warning companies to prepare in time, and promoting the European Commission's "CLP 2015: Act Now!" programme.

In December 2014 **CEPE published the first edition of its Guide to CLP Labelling and Packaging**, which

builds on existing guidance from the European Chemicals Agency (ECHA) and includes additional or specific advice for the paint and printing ink industry. Linked to this Guide is the selection tool for precautionary statements, which has already undergone some incremental revisions and improvements in response to feedback from members. The Guide and its tools remain under continual review by TC-LSDS and will be updated periodically to reflect evolving knowledge and best practice. In February 2015 CEPE held a 2-day practical training workshop for members on mixture classification, which was fully booked and very positively received by the participants. Members also had the opportunity to attend similar workshops organised jointly with other industry sectors in May 2014 and January 2015.

What is CEPE doing now?

Despite the deadline already having passed, some practical implementation aspects still need to be resolved, including:

- » When does a product count as 'placed on the market'? Different interpretations exist in Member States, which hinder the effective operation of the internal market.
- » Multi-lingual fold-out labels – when may these be used, and how should they look?
- » Interface between CLP and transport – are CLP labels required on transport packages for goods which are not classified as dangerous for transport?
- » Use of chemical names – must systematic names be given on labels for substances in mixtures?

At the time of writing no definitive answers have been agreed to these questions, but CEPE is an active participant in the discussions with the Commission and Member States and guidance is expected to

be developed by the end of 2015. Some of these issues are also being discussed at UN level: see below. CLP will also continue to be updated by Adaptations to Technical Progress (ATPs), including the 8th – due for adoption in Q4 2015 - which will align the criteria with the 5th revised edition of GHS. TC-LSDS will review and update relevant CEPE guidance as required.

GHS

*Shaping the CLP
Regulation of the future*

What is the issue?

The United Nations Globally Harmonised System of Classification and Labelling of Chemicals (GHS) sets the framework for CLP in Europe and for similar legislation elsewhere in the world. Industry needs to be involved at UN level to ensure the criteria adopted there are appropriate, since they cannot be modified at a regional or national level. Changes

made to GHS are adopted into CLP approximately two years later.

What has been achieved so far?

CEPE participates actively in the UN Sub-Committee of Experts on GHS, and many of its delegated working groups, as part of IPPIC. The 6th revised edition of GHS has been published in 2015, which includes a new chapter 2.17 on desensitized explosives (important for industrial nitrocellulose, a key raw material for many printing inks and varnishes) and improved guidance on compiling section 9 of the safety data sheet. Other changes adopted in recent editions include improved hazard communication for aerosols, rationalisation of superfluous precautionary statements and clarification of the classification criteria in numerous chapters.

What is being done now?

Activities in which IPPIC is involved in the 2015-2016 biennium include, but are not limited to:

- » Aspiration hazard – viscosity criteria for flow cup measurement
- » Dust explosion hazards – defining guidance criteria (but advocating against a new hazard class)
- » Hazard and precautionary statements – enabling some flexibility in wording
- » Labelling – examples for multi-lingual fold-out labels and sets/ kits; question of GHS labelling on transport packages.

IPPIC is also monitoring work on



Different interpretations exist in Member States, which hinder the effective operation of the internal market.

nanomaterials (potential needs for additional classification guidance) and a global list of chemicals classified according to GHS. The latter is a very long-term objective however, and at this stage is only a pilot exercise to assess the process and resources required.

INFORMATION FOR POISON CENTRES

Harmonised requirements for reporting of hazardous mixtures are eventually drawing closer

What is the issue?

Most EU Member States require information on hazardous mixtures to be notified to appointed bodies, to enable emergency response in the event of a poisoning incident. The European Commission (DG GROW) was mandated by CLP Article 45(4) to review the possibility of harmonising this information across the EU, and is now developing a draft regulation to add the relevant harmonised requirements in an annex to CLP.

What is CEPE's opinion?

CEPE supports the harmonisation of information for Poison Centres, since this would improve the quality of information notified, enable EU-wide statistics for the first time and reduce administrative workload overall for companies. The harmonised requirements must however be workable and proportionate, and be introduced through an appropriate stepwise implementation starting with mixtures for consumer use.

What has CEPE done so far?

Since the first stakeholder workshop in 2010 CEPE has been deeply involved in advocacy activities together with other industry sectors. After several iterations the Commission has put forward a proposal in June 2015 which represents a reasonable compromise between the demands



of Poison Centres, Member States and industry. Final written comments have been made on this proposal by CARACAL, the Competent Authorities for REACH and CLP, including observers such as CEPE. The proposal will now be discussed in the Commission's REACH Committee, with a view to a vote in early 2016 and adoption as a regulation by the middle of 2016.

What will CEPE do as next steps?

The harmonised requirements are planned to come into effect in stages from 1 July 2019 onwards, but there will be much still to do in the interim. An electronic (XML) notification format must be established, along with protocols for data exchange between Poison Centre databases, and an EU-wide product categorisation system must be developed. CEPE will remain closely involved in these essential preparatory activities.

SAFETY DATA SHEETS

In December 2014 CEPE published

the 10th edition of its SDS Guideline, with updates to reflect the SDS content required for products which are labelled according to CLP. Update 10 of the accompanying CEPE Phrase Catalogue has been produced in 2015.

In May 2015 Commission Regulation (EU) 2015/830 amended the requirements for SDS once more, in order to resolve conflicting amendments to REACH Annex II as well as to adapt it to the 5th revision of GHS. The changes, which are minor, are being incorporated into CEPE's guidance for members.

In the last twelve months CEPE has also given input to the revision of the ECHA Guidance on Compilation of Safety Data Sheets, and worked together with the chemicals federation Cefic and others on SDS-related activities. Outputs include guidance notes, checklists and a joint industry position on the use of concentration ranges in section 3.2 of the SDS.

For more on 'extended SDS' requirements, please see the REACH section.

BIOCIDES

Biocides are preserving our businesses;
we want to preserve them as well.

Why do we need to be involved?

In-can preservatives preserve water-based products in their wet stage (in the can) and dry-film preservatives in their dry-stage (when applied). These are essential substances for the proper conduct of our businesses that heavily rely on water based products. As for general chemicals under REACH we could just wait and hope that our suppliers would do their job under the Biocide Product Regulation (BPR). But we know that their task is very difficult and downstream users like us sometimes have to get involved to secure the future of the most important chemicals.

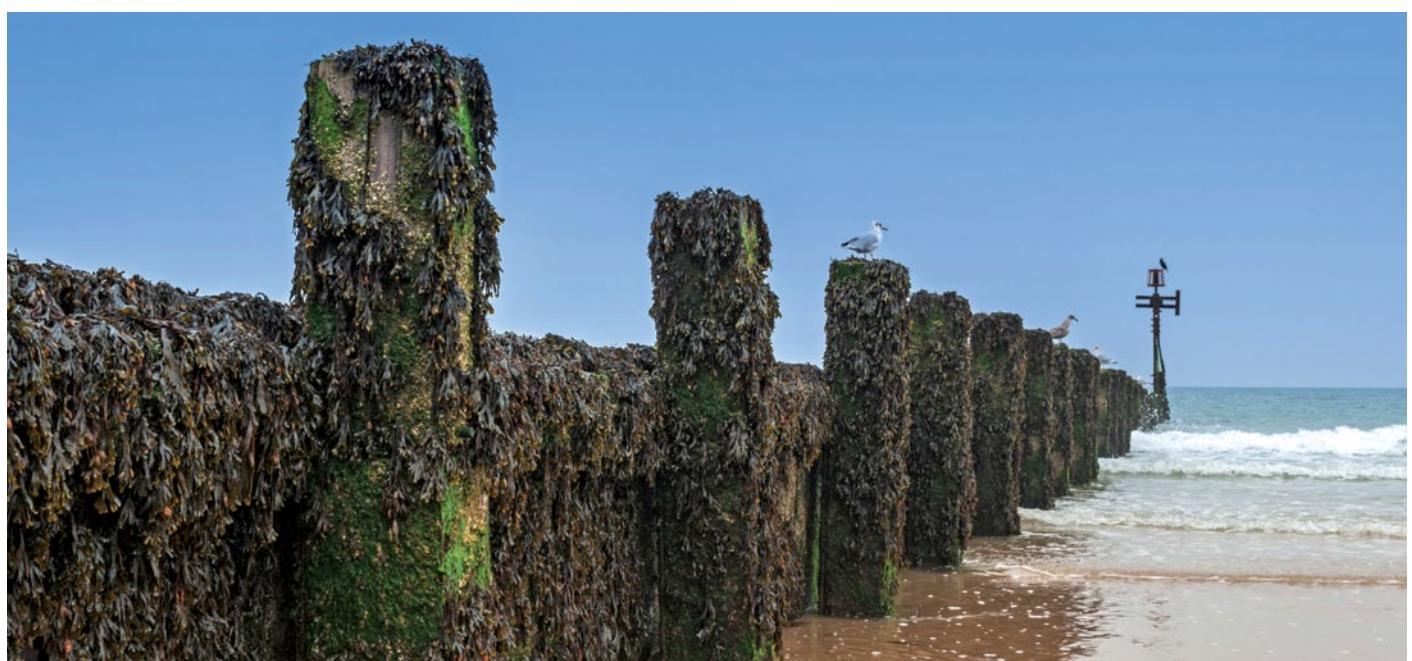
How did we get involved?

Besides the creation of a Biocide User TF within CEPE in 2013, last year we started our advocacy activities when we saw that key biocide substances were under 'the grill'.

For in-can preservation we heavily rely on two families of actives: the formaldehyde releasers that have the threat of being re-classified like formaldehyde (Carcinogen 1, which falls under the exclusion criteria of the BPR) and the isothiazolinones who are potent skin sensitizers. With a 10 page document we informed the Biocide Competent Authorities on the importance of these substances and on the need to take a holistic approach. Indeed, these authorities are in a position to take individual decisions to eliminate biocide substances without any understanding of the impact it may cause and without considering what tools remain for our industries. This lack of socio-economic analysis is specific to the biocide legislation. REACH is much better in that regard but because biocide substances are 'designed to kill life' and may present higher risks than other chemicals,

they have been put by the legislator in 'green hands' Authorities, i.e. in the hands of those who want to reduce their use as much as possible.

The information that we put together with other interested associations (FEICA, AISE, EPDLA) was well received but with the remaining question from the EU Commission 'and now, what can we do?' Actually, the train is launched and the EU Commission's main objective is to finish the review programme of existing active substances, programme that started more than 10 years ago and that has to be ended by end 2024. For COM there is no more room to ask for another extension. Since ECHA (the EU Chemical Agency) took over the coordination role in January 2014 with the objective to make 50 decisions/year (active substance/PT) and with the obligation to finalize a decision within





270 days of receipt of the dossier by the 'rapporteur states', we have seen an acceleration. Although they have not yet been able to reach their targeted cruise speed they are taking measures to reach it. But this is leaving behind other issues and a lot of them are postponed at national stage under the Biocidal Product authorization process.

What's next for in-can preservation?
We have to continue following-up the biocide review programme and intervene whenever necessary. In the coming 12-18 months we have to see how the RAC Committee (the ECHA group that officially classifies substances in Europe) will classify the formaldehyde releasers, and how they will approach the case of MIT. The mixture CMIT/MIT 3:1 went through the review this year with a positive outcome with the maximum use concentration of 15 ppm (which is already the highest level used to avoid labelling for skin sensitization). The current expectation is that MIT will have a hard time

due to the reported cases of allergies and expected low classification threshold. We hope that BIT will remain with the concentration limit of 500 ppm. It has the advantage that it has not been used in cosmetic, the key source of problems for MIT. However it might have to face issues with high tonnages in environmental risk assessment and the cumulative approach from uses in various areas.

The case of MIT

Given the high prevalence rate of allergies to MIT seen in hospitals throughout Europe, and after several discussions, the Deco group decided that their paint labels should mention the presence of MIT below 100 ppm and above 15 ppm (some members decided to start at 1 ppm already), pending its official classification, in order to inform users who might have developed allergy to MIT. This proactive action shows our commitment to product stewardship and provides long term support to this valuable biocide (it is typically used in combi-

nation with BIT and offers excellent control of some strains of bacteria).

What about dry-film preservatives?

The review of this group of biocide active substances is taking place at a later stage than for the in-can preservatives and has not yet required our direct intervention with the Competent Authorities. However, it becomes clearer that they will be under heavy pressure due to possible surface water contamination. The methodology for performing the risk assessment has worsened so the CEPE Biocide User TF is going to address a number of questions that biocide suppliers have, to help them in their defence. The literature has started some years ago to stigmatize them as being environmental contaminants. Some Member State Authorities are taking this seriously and intend to strengthen measures under the topic of sustainable use of biocides.

Sustainable use of biocides

The Commission had to report to the Parliament in July 2015 on this

topic, which already exists under the Plant Protection Regulation. Basically it is recognized that the regulation of these substances is not sufficient to their proper use and additional measures should be taken. This can go from the certified training of professional users through the correct maintenance of application equipment to the monitoring of biocides in the environment. As stated before COM's first objective is to finalize the review of the existing active substances and not add another layer of constraints, hence at this time we do not expect too many additional difficulties. However, some Member States are unhappy and want to put more pressure on regulators. This was illustrated by the organization of another workshop on the monitoring of biocides in the environment where several important biocides have been targeted. The fact is that the key algaecides are found under the Water Framework Directive monitoring activities, but we do not know if there is a real issue. Finding some substances at some point in some concentrations does not mean that the entire environment is threatened. However again politically it will have an impact and industry cannot be passive. This will be further discussed with biocide suppliers in the future.

Labelling of treated articles in the supply chain – COM unexpectedly turned their position to 180°

As reported previously a standard sentence was added to the approval regulations of skin sensitizer active substances from October 2013 requiring additional labelling elements on our paint labels, without any distinction between potency and any threshold. We argued that this goes well beyond the CLP requirements (the EU legislation for the classification, labelling and packaging of chemicals) and should not be added for chemical mixtures. After a full year

Finding some substances at some point in some concentrations does not mean that the entire environment is threatened.

of discussions with the support of the Commission, it turned out at the last Competent Authority meeting that the Commission (DG Environment) had changed their mind towards the most severe and vocal Member States who wanted to stigmatize biocides. This 180° change of mind was likely due to their objective of finalizing a backlog of approval regulations. Again this shows how

industry is treated in the hands of those Competent Authorities. The new position has also added criteria leading to new labelling elements, and these are only based on hazard and not on risk.

Conclusions

The biocide topic is not going to become 'dormant' in any near future. On the contrary it will require an increased attention following the progress of the review programme. CEPE is intensifying its discussions and collaboration with biocide suppliers as we have a common objective to keep as many 'tools' available as possible and CEPE should be able to help some issues. The biocide industry's main challenge is that it is always confronted with the same regulators, those 'greens' who see industry's opinions as adverse by default. It has up to now failed to find political support. A small group of companies and associations like CEPE intend to discuss other possible approaches.



NANOTECHNOLOGY

Nano size particles that are part of the tail of the size distribution of long time used pigments and fillers should stay out of a definition on nanomaterials that may be used for future legislation.

What is the issue?

The authorities in some EU Member States believe that not enough is known on the safety and health aspects of nanomaterials. And to be rather safe than sorry they want to regulate or at least monitor where such materials go in their country. Obliging companies to register their nanomaterials in these countries. Now the case in France, Belgium and Denmark.

The European Commission is not denying that nanomaterials may have some health or safety issues but thinks that with REACH these issues will be part of the manufacturer's registration. The nanoform is so far not explicitly mentioned in REACH but will via a new annex be included. In order to know what one is talking about the EC launched a 'working definition' for nanomaterials in 2011. Which is to be reviewed soon.

With a definition that only deals with the dimensional aspects of nanomaterials the CEPE members may face:

The overload of registrations will not distinguish between the nanomaterials with 'real' hazard concerns and those who have been evaluated and in use since ages.

» A disproportionate administrative burden.

» An unnecessary increase in business complexity (= costs) for the industry (testing and proving: the nanoscale, the nano-content, the toxicology aspects)

The overload of registrations will not distinguish between the nanomaterials with 'real' hazard concerns and those who have been evaluated and in use since ages.

What is CEPE's opinion?

In all of the discussions on nanomaterials it is important to focus on those nanomaterials for which reasons exist to address their potential or perceived hazard. Applying the EC definition on each and every powdery substance will categorize many of these substances as nanomaterials. While suppliers of such substances will have a certain number of nanomaterials in their portfolio, downstream users like the CEPE members will have thousands as they typically use at least one such substance in most of their formulations. If the decision is made to retain the current working definition, it will be the producers of mixtures who will be impacted the most by any forthcoming administrative obligations on 'contains nanomaterials' (which may result from legislations or registers). The users of these mixtures will get the wrong message that they either receive newly developed mixtures, or that the mixtures they always received and used were more hazardous than they were previously informed.



CEPE also believes that the delivery form of nanomaterials that may pose a risk (the unbound or aggregated nanoparticles) – this risk disappears once the nanomaterial is incorporated into the matrix of ingredients of the mixture, which has been proven by several recent studies.

What has CEPE done so far?

Advocate the above opinion to the national authorities with the help of the National Associations.

Collect or run studies on nanomaterials bound in a matrix of paint.

Be involved in the discussions on standards at the CEN and ISO level.

The Commission having mandated the CEN TC 352 to develop European standards, which could be later adopted in regulations applicable to nanomaterials, CEPE encourages its members to get more involved in the discussions notably concerning the nanoresponsible development, life cycle analysis and the nanowaste. At ISO level, numerous standards on terminology and HSE aspects are being developed. Since 2013, FIPEC is representing IPPIC at the ISO meetings.

What will CEPE do as next steps?

Reassess its position when the Commission comes out with the review and recommendations on the nano definition.

Continue to collect scientific studies on nano in matrices.

Advocate in standardization bodies the industry's position.

FACET Flavours, Additives, Contact materials Exposure Tool

FACET: A model to assess the potential human exposure to substances used in flavourings, food additives and food packaging materials

What is the issue?

Today EU regulators assess risk primarily on hazard rather than by considering hazard and exposure to that hazard. FACET provides the exposure part of any risk assessment for FCMs (Food Contact Materials). A main field of work for the CEPE and EuPIA sector groups supplying the food packaging industry is exposure and associated risk to substances in coatings or packaging inks that might migrate into the packed food or drink. The industry's aim is to move away from calculating the risk only on the basis of migration values and towards using total exposure for risk assessment. This helps establish the risk in a much more realistic way.

What has CEPE done so far?

CEPE and EuPIA, in cooperation with eleven other associations along the supply chain, and some non-industrial institutes, were involved in a 4 year DGResearch funded project which finished August 2012. This was the first time that a harmonized tool and approach were developed jointly with industry and at EU level. FACET consists of a number of integrated databases and statistical migration and exposure soft-

ware. The professional associations (FIG – FACET Industry Group) have continued to fund the development of FACET for the purposes of migrants from food packaging.

Latest developments include additional functionality for estimating exposure to new substances, new packaging and new uses for existing substances and of ever increasing importance the facility to estimate exposure to NIAS (Non Intentionally Added Substances). The FACET software devised for end-users such as DG-SANCO and industry has unique features including focusing on particular EU regions, foodstuffs, and substances. The main originality of the approach is to perform exposure calculations on tiered intake databases, which were optimized according to available or generated concentration occurrence databases.

The above functionality was incor-

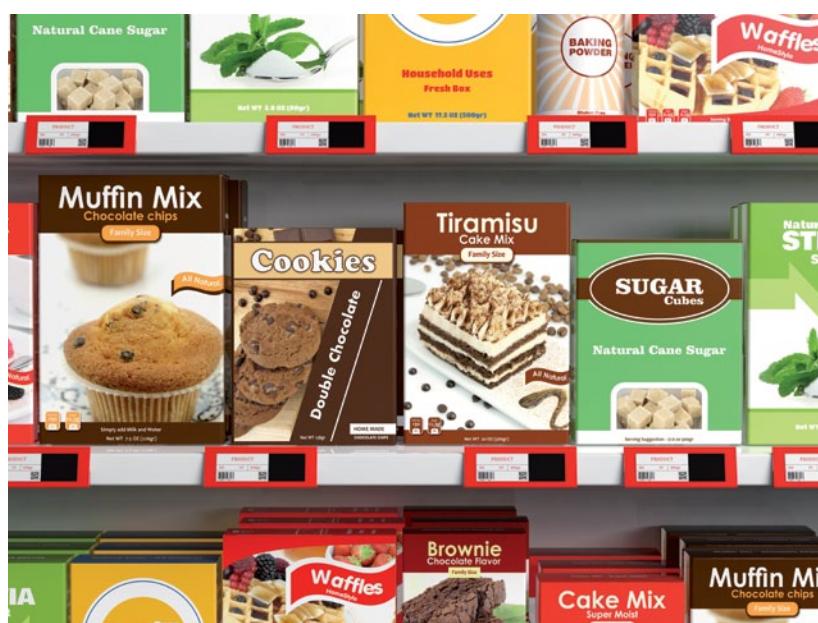
porated into a beta version launch at PIRA Conference in December 2014. A number of peer reviewed papers have been published. One of the most important, for the acceptance and credibility of FACET, estimated exposure to BPA (BisPhenol A) from canned food and drink. The estimates were similar to those from EFSA for canned foodstuffs.

What will CEPE do as next steps?

FACET has been presented at several conferences and workshops attended by experts from the European Food Safety Authority (EFSA), the European Commission and EU Member States. Numerous training programmes have taken place, both for different packaging sectors, EFSA and Member States. More are planned. The focus of industry training was to train the 'trainers' so that they can further train others

in their industrial sector.

With the lack of progress in harmonized legislation for non-plastics and the emphasis being placed on managing risks for non-plastics, FACET will play an important role, particularly when used with the Belgian (Council of Europe) Database of food contact substances, which contains toxicological data, some in-silico.



TRANSPORT

What is the issue?

About half of all CEPE members' products are classified as dangerous goods for transport, and their safe, timely and cost-effective transportation is dependent upon having the right rules in place. The framework is set at global level in the UN Recommendations on the Transport of Dangerous Goods – Model Regulations, and implemented in the different modes through their own regulations:

- » The IMDG Code for sea transport, administered by IMO
- » The ICAO Technical Instructions for the Safe Transport of Dangerous Goods by Air
- » For land transport in Europe, the UNECE agreements known as ADR (road), RID (rail) and ADN (inland waterways), which are adopted into EU legislation by Directive 2008/68/EC and its subsequent amendments.

Maximum harmonisation between the modes is desired to reduce the complexity and costs of transport for companies.

How does CEPE address this issue?

With the exception of European land transport, CEPE participates in transport bodies as part of IPPIC, in close co-operation with colleagues from the American Coatings Association and with consultation/support of other IPPIC member organisations around the world. IPPIC is always represented at the bi-annual sessions of the UN Sub-Committee of Experts on TDG, and as required at IMO and (less often) ICAO. When necessary CEPE can participate in its own right in the UNECE Joint Meeting on RID/ADR/ADN and in the Working Party on Dangerous Goods WP.15. Wherever appropriate



IPPIC/CEPE also works together with other industry observers, such as the European Chemical Industry Council Cefic, on issues of common interest.

What has been achieved lately?

The 19th revised edition of the Model Regulations (published June 2015) includes the kinematic viscosity criteria for packing group assignment of viscous flammable liquids in 2.3.2.2 as requested by IPPIC. These have also been adopted into the modal regulations where not already present (as for ADR). More significantly, IPPIC's proposal to extend the exemption for viscous flammable liquids (2.3.2.5), to include those which are environmentally hazardous and packaged in small quantities (≤ 5 litres), was also adopted into the 19th revised edition. Since this will not be implemented into modal regulations until at least 2017, a multi-lateral agreement (M284) has been adopted allowing its early application in ADR in certain Member States. At the time of writing the UK, Sweden and Germany are signatories to this agreement.

At IMO, IPPIC has again successfully opposed a new Special Provision on marine pollutants (to indicate generic entries which might be marine pollutants and thus require addition of a technical name), which was believed likely to increase confusion

as well as divergence from the Model Regulations.

And at ICAO, a joint proposal from IPPIC and others for a transition period on new versions of the Technical Instructions was not adopted as such. A new standing work item was however added to consider transitional measures for individual amendments to the TIs, under which industry can submit future proposals.

What is to be done next?

A number of issues remain to be addressed during the UN 2015-2016 biennium and beyond. After two years' work without reaching a conclusion, criteria are still lacking for the assignment of packing groups to corrosive mixtures in Class 8 without the need for testing. A harmonized description for "Aquatic Pollutants" has still not been taken up across modes despite receiving support at IMO. IPPIC has also been invited to submit proposals to harmonize, i.e. raise, the package size limit for viscous liquids in IMDG Code to 450 litres from its current 30 litres.

Finally, in 2015 IPPIC is participating in a consultation by the UNECE secretariat to evaluate the impact of its work and the regulations. This will help to identify potential improvements and new initiatives to enhance the effectiveness of the whole TDG system.



› **Martin Kanert**
Executive Manager EuPIA

EuPIA, the European Printing Ink Association, working under the umbrella of CEPE, represents and protects the common interest of the European printing ink business and promotes the image of the industry to the public. EuPIA provides a forum for discussion and decision-

EuPIA

Annual Report 2015

making regarding issues of specific interest to the printing ink industry. EuPIA members also participate in CEPE working groups dealing with issues of general interest to the wider CEPE membership.

MARKET STATISTICS 2014

EuPIA publishes market statistics on an annual basis. The data can be accessed via the EuPIA website at eupia.org, section publications - statistics.

The aggregated figures displayed in the charts below summarize

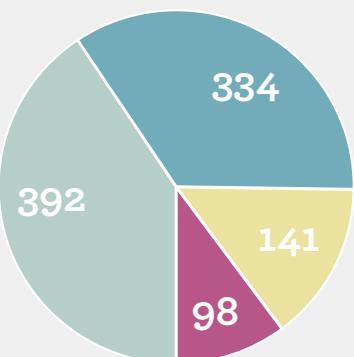
- » Sales value per country total
- » Sales volume and value per category for Europe total

The figures comprise domestic ink data collected for 30 countries or country groupings in Western and Eastern Europe and represent the activity of 28 EuPIA members parti-

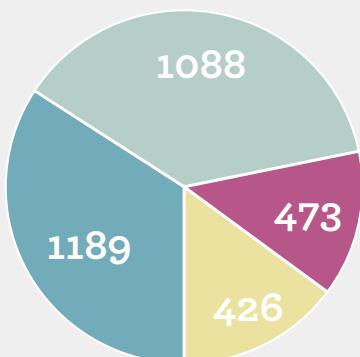
cipating in the statistics. It is believed that this represents about 90% of the total European market.

The global ink categories for which the aggregated figures are displayed are defined as follows:

- » Liquid inks water borne – includes flexo and gravure water borne inks, technological varnishes, extenders, primers, and overprint varnishes
- » Liquid inks solvent borne – includes flexo and gravure solvent borne inks, publication gravure inks, technological varnishes, extenders, primers, and overprint varnishes
- » Oil based inks - includes coldset and heatset offset as well as conventional sheetfed offset inks
- » All other inks – all other inks except screen ink sales which are not included in these statistics



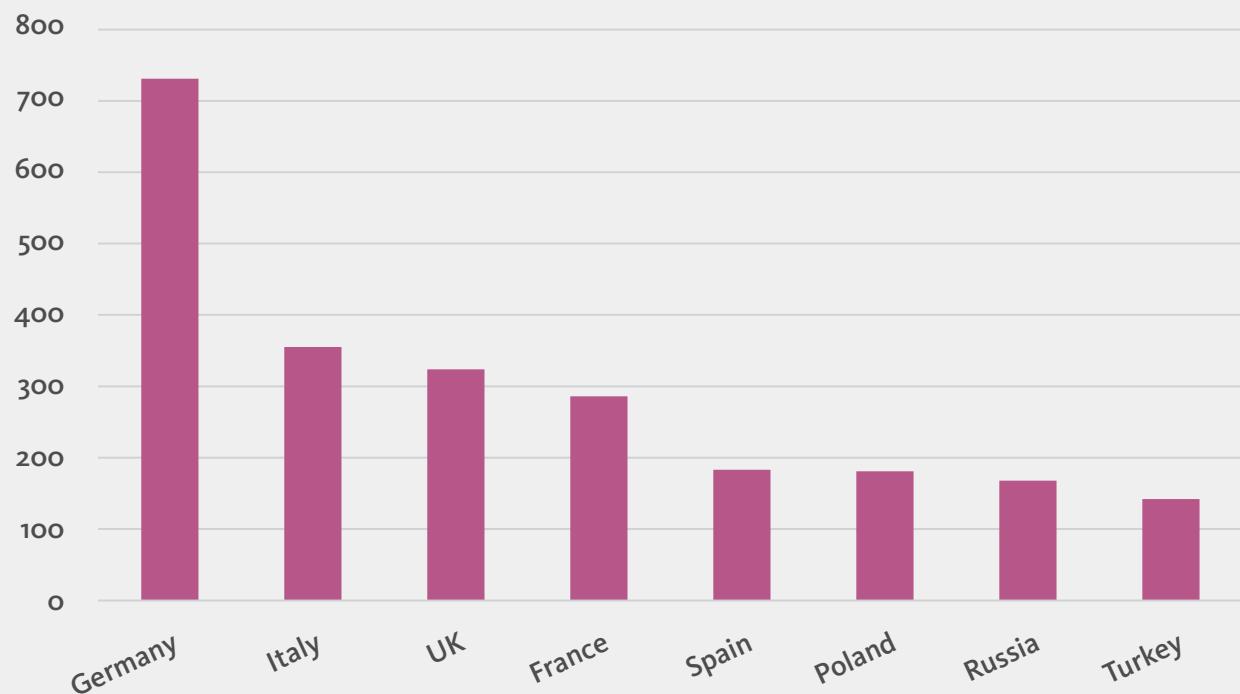
Sales Volume
for 2014 (000s tons)



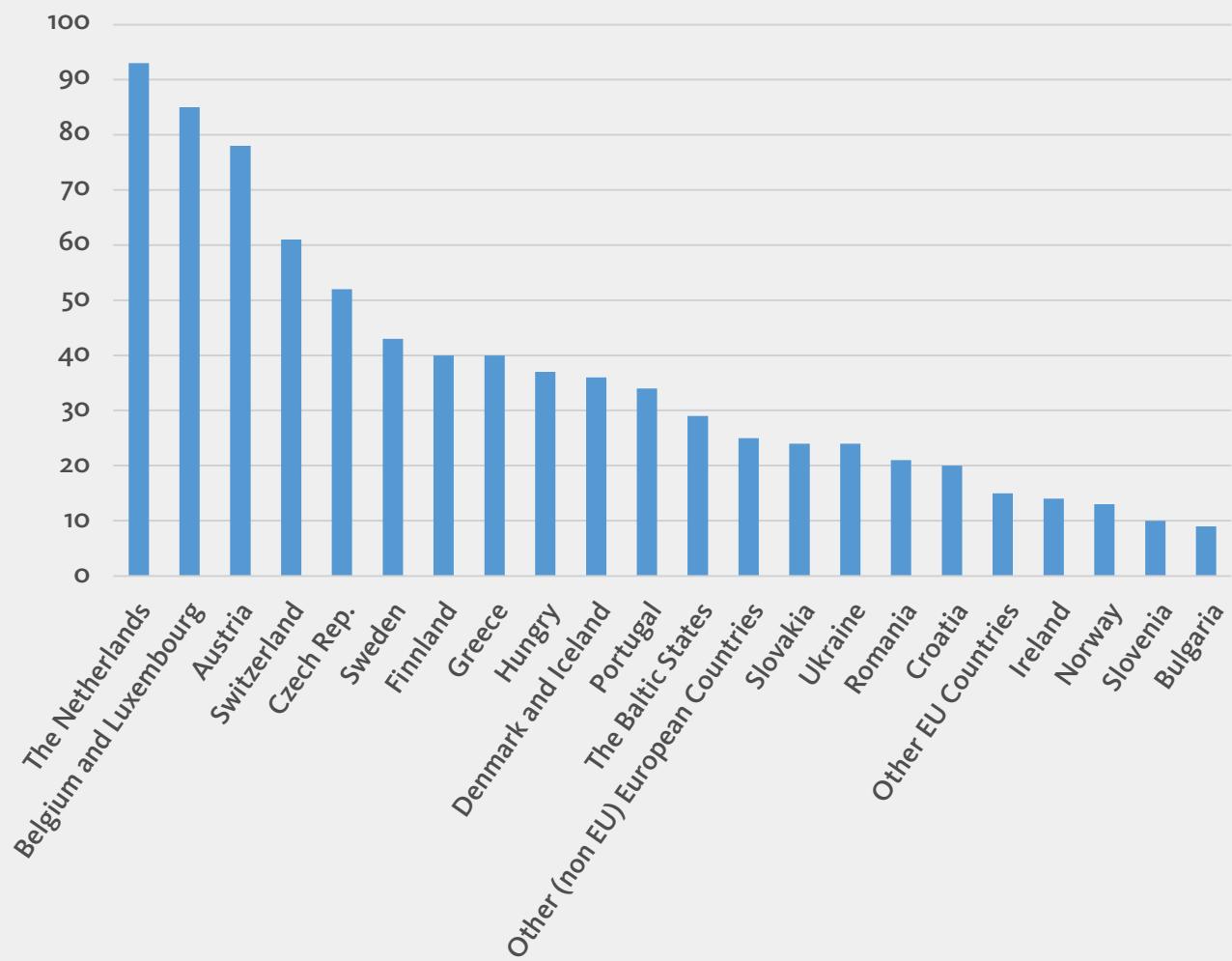
Sales Value
for 2014 (€m)

- **Oil based inks**
- **Solvent borne liquid inks**
- **Water borne liquid inks**
- **All other inks**

SALES VALUE BY COUNTRY FOR 2014 IN £M



SALES VALUE BY COUNTRY FOR 2014 IN €M



A SLIGHT recovery

An optimistic forecast for
Europe's printing inks industry

Eric Van de Meerssche

EuPIA's 12th Annual conference was held on 23 - 24 April 2015 in Marseille, France. It attracted more than 70 attendees from about 30 companies and associations. The eight presentations put a focus on macroeconomic factors affecting our industry, the impact of digital technology on traditional printing, the raw materials situation and innovation in the Packaging field.

In his opening speech EuPIA's Chairman Felipe Melado shared the 2014 key facts that were the drivers of this year's conference:

- » Weak European economy;
- » Political turbulence, which affects the business climate;
- » Beginning of a currency war;
- » Continued decline of print media business;
- » Multiple trends affecting the packaging world

As usual the conference began with „The year in review“ by Dr Martin Kanert, Executive Manager of EuPIA. The focus of Kanert's intervention was the legislative burden that affects the Printing Inks industry and the need for a European legislation on food contact materials as opposed to multiple national initiatives.

The business session started with Christian Schaefer, VP at J.P. Morgan's Investment Banking Division giving the attendees an external view of the industry, followed by Mark Hanley, founder of IT Strategies, who gave the audience his views of how digital printing is impacting traditional printing.

RAW MATERIALS PRICES ARE LIKELY TO INCREASE IN THE COMING MONTHS

Ulf Neidlein, responsible for resins and additives at BASF, made it clear, during his presentation "Printing Inks: Raw Material supply situation and perspective" that despite the fall of the Euro against the Dol-

lar raw material prices are likely to increase in the months to come.

Andy Sweetman of Innova enlightened us on the use of renewable raw materials and especially the use of bio based materials and the challenges of combining the right materials to comply in the layers of packaging.

The second day was dedicated to the use of innovative packaging. Graham Tilley of Interflex showed the results of the Reflex Project in the UK. This project aims to create a circular economy for flexible packaging and makes it obvious that there is need of a good collaboration between researchers and industry. Matthew Kensall of Sun Branding Solutions gave an overview of the facts and figures about the use of packaging. He made some impressive comparison showing e.g. that the total amount of metal used annually in the UK equals 3,000 747's or 105 Brooklyn bridges. He made similar comparisons with glass, paper and plastics. This session was wrapped up with a panel discussion.

THE PRINTING INKS INDUSTRY WILL BE PACKAGING DRIVEN IN THE FUTURE

Martin Cellerier, Chairman of EuPIA's Statistics Working Group ended the conference. In total, the volumes for printing inks went down in 2014 (-1.2 %) compared to the figures in 2013. The two segments showed a difference. While publication inks further declined by -3.2 %, packaging inks could record an increase of +2 % in the last year.

In contrast with the last years Mr Cellerier had some good news. The overall market is slightly recovering and the forecast for the next couple of years is optimistic. Obvious shifts are noticed. Where the European market 10 years ago was publication driven, today it shifted clearly to be packaging driven and this trend isn't reversible.

The next conference will be held on 21 and 22 April 2016 in Wroclaw, Poland.

(was published in ECJ 06/2015)

PRINTING INKS AND VARNISHES APPLIED ON FOOD CONTACT MATERIALS

EU Commission Roadmap on specific provisions for non-plastic food contact materials

Food Contact Materials must be manufactured such that they do not transfer their constituents to foodstuffs in quantities which could endanger human health, cause an unacceptable change in the composition of the food or inadvertently affect foodstuffs in terms of odour and taste. These general requirements are laid down in the European Framework Regulation (EC) No 1935/2004 on materials and articles intended to come into contact with food.

At present, on European level specific legal provisions exist for plastics, regenerated cellulose film, ceramics, active and intelligent materials and recycled plastics.

In the absence of specific EU measures, Member States may maintain or adopt their own national provisions on food contact materials, which are likely to differ from one Member State to the other. Such differences introduce inconsistencies in the approach to regulating food contact materials and have the potential of hindering the free movement of those materials in the internal market. Therefore, in 2012, the European Commission had started an initiative to check the necessity and options to regulate non-plastic food contact materials, and summarized its views in a so-called "roadmap". Subsequently, the Commission consulted Member States and industry for their opinions. EuPIA and many other trade associations took part in the consultation process and identified "printing inks" and "paper & board" as materials for which EU provisions should be established with priority.



In the latter part of 2014, the European Commission's Joint Research Centre (JRC) has started to carry out a study aimed at providing a comprehensive overview of the current situation concerning non-plastic food contact materials. This so-called "baseline" study will map the industry supply chain and collect existing legal provisions on Member State level as well as industry self-regulations for these materials. EuPIA is contributing to this study. The study is expected to be completed by the beginning of 2016, and will allow the European Commission to identify priorities for future regulations of food contact materials.

German Consumer Goods Ordinance: draft amendment

In July 2014, the German Federal Ministry of Food and Agriculture had made available the 5th draft of the 21st ordinance amending the German consumer goods Ordinance; this amendment is called "Printing Ink Ordinance".

The Federal Ministry is reported to have reiterated its position that a European regulation is more appropriate and to have once again requested that the European Commission take the initiative to regulate

printing inks to be applied on food contact materials. Therefore, the draft has not yet been notified to the European Commission pursuant to Directive 98/34/EC, nor to the WTO. EuPIA and the entire European food packaging supply chain as represented by the Packaging Ink Joint Industry Task Force (PIJITF) support this view of the German Ministry and have conveyed this position in writing to both the German Federal Ministry and the European Commission.

Irrespective of this fundamental position, EuPIA and its member companies encourage and assist their raw material suppliers to compile and submit to the relevant authorities toxicological dossiers for substances which either are not yet included on the draft positive list or for which more favourable migration limits should be set. In this regard, EuPIA collaborates with ESIG (European Solvent Industry Group) for solvents, with ETAD (Ecological and Toxicological Association of Dyes and Organic Pigment Manufacturers) for pigments and with RadTech (the association for UV/EB curing technology) for UV raw materials.

In addition, EuPIA assists the German Federal Institute for Risk Assessment in drafting a guideline

for the safety evaluation of substances used in inks for food contact materials. This guidance is intended to complement the requirements of the EFSA Note for Guidance with specifics for print on food contact materials and would have to be followed once the "Printing Ink Ordinance" were in force.

Swiss Consumer Goods Ordinance: provisions for food packaging inks

Switzerland is in the process of revising its food law. The main purpose is the adaptation – as far as possible - to the provisions of the European Union. To this end, the relevant Swiss law is being completely revised and restructured. The total package comprises four ordinances of the Bundesrat (Swiss Federal Council), 22 ordinances of the Federal Department of the Interior (EDI), and one ordinance of the Federal Food Safety and Veterinary Office (FSVO). These ordinances will replace the currently relevant 28 ordinances.

The EDI has started a public consultation which will last until end of October 2015. The revised set of ordinances is intended to come into force in the first half of 2016. All the

documents are publicly available (in German, French and Italian) at <http://www.blv.admin.ch/dokumentation/01013/05845/05846/index.html?lang=de>.

The revision also affects the section on food packaging inks of the Consumer Goods Ordinance as well as the related substance lists. EuPIA and the Swiss Association VSLF-USVP are studying the draft and will convey their comments to the relevant authority.

Networked working group of practicing analytical experts from across the packaging inks and coatings industry

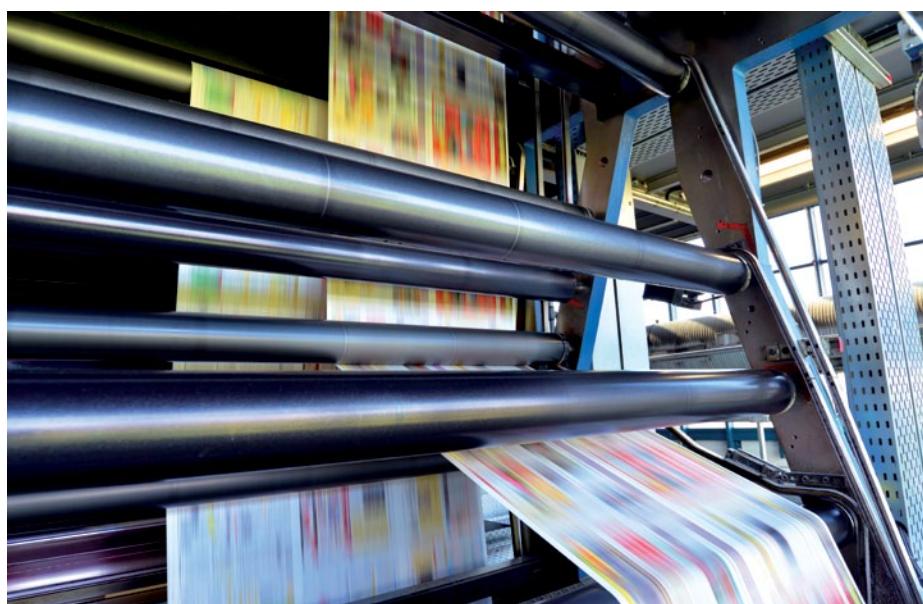
EuPIA established a new working group of practicing Analytical Experts from across the packaging inks and coatings industry: The AEWG (Analytical Experts Working group). The group will respond to a range of demands, of which some are explained below:

» Development of analytical methodologies in support of industry wide threats, crises and regulatory based initiatives as defined by the Technical Committee "Printing Inks for Food Packaging" (PI-FOOD).

- » Create analytical standards as demanded to support the creation of Regulations or Guidance on Regulations, plus act as expert reviewers of Analytical Standards proposed by third parties as part of Regulation/Guidance to the food packaging industry
- » Represent EuPIA as Industry Experts on Regulatory-creating or Industry-wide Working parties and Committees
- » Investigation and critique of erroneous analytical protocols, claims and findings that have the potential to have serious, unjustified, long-term impact on the food packaging ink/coatings industry

Exchange of Information along the food packaging supply chain: The "Statement of Composition" (SoC)

Due to the complexity of the process, all members of the packaging chain must exchange relevant information - under appropriate confidentiality agreements if necessary – in order to ensure that products can be formulated to be fit for purpose, and thus be compliant with legal requirements. To this end EuPIA members are prepared to provide adequate information about the composition of their products by means of a standard Statement of Composition (SoC). This SoC will list those substances with a potential to migrate along with applicable migration limits and the amount of that substance in the print. The migration limits for a substance may come from the Plastics Regulation (EU) No 10/2011, from the Swiss Ordinance SR 817.023.21 or from another recognized authority such as EFSA. In order to reflect the recommendations for printing ink manufacturers given in the "Union Guidance on Regulation (EU) No 10/2011 on plastic materials and articles intended to come into contact with food as regards information in





the supply chain", the SoC was adapted to now additionally include information on certain primary aromatic amines (paa) which may be present as unavoidable impurities in any azo pigments as well as certain metals with restrictions in the Plastics Regulation. The extended SoC is used by EuPIA members as of April 2015.

EuPIA Technical Committee

Technical issues and non-food applications of printing inks fall under the remit of the EuPIA Technical Committee (ETC) and its subsidiary working groups, Operational Safety & Risk Assessment (OSRA), Labelling & Safety Data Sheets (LSDS) and the Task Force "Mineral Oils in Publication Inks".

Commitment to worker and product safety

The EuPIA Exclusion List for Printing Inks and Related Products is one of EuPIA's most important and most visible commitments to protecting safety in members' operations and products. In light of the challenges identified last year involving the re-classification of a key substance, and the changing regulatory landscape with increasing controls on substances under REACH, ETC em-

barked on a review and adaptation of the Exclusion List to ensure that it remains fit for purpose in this new environment.

The result is the new EuPIA Exclusion Policy, which retains the principle of hazard-based substitution but incorporates some elements of risk assessment where substitution is demonstrated not to be viable in the short term. Exemptions can be granted for specific applications, which for the more hazardous substances require the explicit approval of ETC. Mandatory reporting to the EuPIA secretariat is introduced for any member using the exemption procedure, and ETC will monitor the application of the policy on an ongoing basis. At the time of going to press an internal Explanatory Note for members on the new policy was in preparation.

In the past year ETC has produced a number of new documents aimed at improving transparency and understanding about the potential or perceived hazards of printing inks and related products. Customer information notes have been published on the change in labelling resulting from the switchover to the CLP Regulation, and on the implications of a substance being included in the Community Rolling Action Plan (Co-RAP) for substance evaluation under REACH. Following media attention

to allergic skin reactions, ETC has also published a recommendation to all members to communicate via Technical Data Sheets about the presence of skin-sensitizing biocides in water-based products.

ETC also monitors the regulatory status of numerous 'substances of interest' to the printing inks sector and undertakes specific actions where required. EuPIA is cooperating with other industry sectors to address the threat of a potential re-classification of ethanol. Recently the acrylate monomer HDDA has been singled out for potential identification as a Substance of Very High Concern (SVHC) under REACH, on account of its skin sensitizing properties. This could set a very severe precedent for monomers and skin sensitizers in general, so EuPIA has mobilised to collect data on uses and reported cases for this substance in order to react to the planned public consultation.

Sustainability and the environment

ETC established a 'virtual reference ink', representing the statistical distribution of ink products on the market, for which an eco-footprint was calculated using the CEPE tool and methodology (see Sustainability article). A consultant has been commissioned to carry out a study to contextualize the results of the EuPIA eco-footprint and interpret its significance for the supply chain. This will then be used to decide on further communication.

EuPIA continues to participate in the European Recovered Paper Council (ERPC), through which it supports the "European Declaration on Paper Recycling 2011-2015", a voluntary cross-industry commitment to a sustainable increase in paper recycling - see the ERPC website at www.paperrecovery.org.

In April 2015 ERPC published a revised

version of its Deinking Scorecard (available at www.paperforrecycling.eu), including the introduction of an annex listing exemptions from testing for specific printed products with known good deinkability properties. EuPIA assisted in drafting the criteria for such exemption by providing model formulations of relevant printing inks. ETC is also monitoring discussions on the Circular Economy in Europe and will give input on any developments related to printing ink and its role in the recyclability of paper.

Co-operation with upstream and downstream sectors

ETC members have continued to participate in the European Task Force on cosmetic packaging regulatory aspects, together with cosmetic brand owners and members of the packaging value chain. The Guideline on Information Exchange along the Value Chain has now been finalised and sent for Cosmetics Europe board approval; work continues to develop a related short list of 'declarable substances', representing a pragmatic reduction versus the c.4000 substances listed in Annexes II and III of Regulation 1223/2009 on cosmetic products. ETC continues its bilateral cooperation with the European graphic and printing federation Intergraf, including support where needed for data on solvent emissions from printing processes. In 2015 EuPIA has confirmed its support for the European "Keep Me Posted" campaign (www.keepmepostedeu.org), which promotes the right of citizens to choose how they receive important information such as tax forms, election documents, bills and statements. Selected EuPIA members have also agreed to support the Print Power campaign, which promotes the value and effectiveness of print media, through the supply of inks for its publications.

Task Force "Mineral Oils in Publication Inks"

The Task Force has responded to the plans of the German federal environment agency UBA to carry out a long-term print trial using inks without critical mineral oil components. Support will be provided in the form of expertise only, and individual printing ink companies are free to decide whether to participate. Updated EuPIA statements have been published on: Food Packaging made from Recycled Paper and Board; Recyclability of printed paper and board articles for use in primary food packaging; Printing ink industry contribution to German paper, paper converting and food industry initiatives to reduce mineral oil in paper and board packaging.

LSDS Working Group

The group has contributed to the revision of CEPE's guidelines on labelling and safety data sheets (see Hazard Communication article) and to advocacy activities on these topics. It has also carried out important exercises to validate the printing SWEDs in the CEPE project on safe use information for mixtures (see REACH chapter). The group continues to hold two meetings per

year, one of which jointly with the CEPE TC-LSDS.

Operational health and safety

The EuPIA OSRA group supports members of EuPIA and CEPE, but also their customers and downstream users, to operate at a high level of plant and occupational safety. OSRA continues to publish its popular Safety Flashes and Safety Alerts on an ever-broader range of topics, with recent publications including such diverse issues as lifting gear, collapsing storage racking and exploding e-cigarette chargers. Updated guidelines on safe handling of energy-curing materials, both for members and for customers, have been published and a new guidance on laboratory safety was being completed at the time of writing. A number of new and additional topics have been identified for potential development of guidelines, and occupational safety issues related to 'substances of interest' have been added to the group's standing agenda. OSRA guidelines and alerts are made available on the Workplace for use by EuPIA/CEPE members, and are widely translated and disseminated by national associations. Guidance intended for customers is also made available on the public area of www.eupia.org.



EDUCATION

The paint industry is facing an ever greater shortage of paint chemists with an academic degree.

What is the issue?

CEPE's Working Group on Education has made assessments of the situation for the demand of paint chemists by the Industry and the numbers that graduate from the Universities. There is and will be for some years a shortage which will limit the industry's capacities in product development and innovation.

What has CEPE done so far?

To mitigate some of the shortage CEPE has set up with the ITECH institute (Lyon, Fr) an English master course for paint chemists. It is expected that the English speaking graduates can be employed by paint companies across the EU.

In order to attract the next generation of chemistry students to this 3 year course CEPE has invited paint companies to consider the sponsoring of a student for this course. The sponsoring company funds the 3 year course and offers the student the opportunity to do his study assignments on the company's laboratory.

To compete for a scholarship the student makes a short video to 'paint him- or herself' in which the passion for paint and their ideas on the next generation of paints should come across. In the jury each of the sponsoring companies selects the student they want to sponsor.

For the course that started in September 2014 in total 9 students were sponsored by 7 companies.

What will CEPE do as next steps?

Since the first paint chemist course CEPE worked hard to get good promotional material.

The paint industry is not very visible for the chemistry student. To change that CEPE has launched a video which illustrates that behind every paint there is a can full of chemistry. The video is available on youtube

<https://youtu.be/-YBmz-oVCUM>



To promote the ITECH 3 year course a poster (being a booklet at the same time) was designed and will be distributed across the relevant Universities where there are chemical faculties. By the time of print for this CEPE annual report the sponsors will hand out the awards for the students of the 2015-2018 course.

With the national associations in the coming years more relations have to be established to attract students from every part of Europe and where possible link them with a local sponsor company.



CEPE normally operates within the EU scope. But for some issues it makes sense to co-operate on the global level while issues are originating from the UN or any international organisation or because the nature of the issue is not limited to the borders of the EU.

To be effective on the global level CEPE is a member of IPPIC (the International Paint and Printing Ink Council), which represents the interests of the industry on an international level and provides a forum for information exchange and cooperation on the major issues and priorities of the paint and printing ink industries worldwide. Other countries outside EU that actively participate in IPPIC are: the USA; Canada; China; South Africa; Mexico; Japan; Australia; Brazil. The 2015 annual meeting was hosted by the Australian Paint Association in Noosa.

The main activities that are currently treated under IPPIC are listed here.

HARMONIZATION OF NATIONAL OR REGIONAL SUSTAINABILITY PROGRAMMES

At this year's meeting in Noosa, Australia, the Sustainability issue was discussed for items like

- » The product category rules in Life Cycle Analyses
- » The handling of postconsumer waste; a dedicated workshop on the handling of left over paint
- » Bio-based materials and the related

ISO standards under discussion.



NANO MATERIALS

Not every IPPIC member experiences the same legal pressure as CEPE may do in Europe, but the interest every member shares at the global level is clear definitions and measuring techniques which may be used for future legislation.

For that purpose this topic is on the regular IPPIC agenda and is represented in the appropriate Technical Committees of ISO.

MONITOR AGENDA OF MEETINGS OF THE INTERNATIONAL AGENCY FOR RESEARCH ON CANCER

There are momentarily no new items to address coming via IARC.

LEAD IN PAINT

IPPIC endorsed a continued participation in this UN effort, acknowledging that the use of lead in paints is ruled in the countries of the IPPIC members. The participation comprises data supply and substitution recommendations.

The UN Global Alliance to Eliminate Lead in Paints (UN-GAELP) has launched a website at:
http://www.chem.unep.ch/Lead_in_paint/default.htm

IPPIC will make efforts to increase industry awareness of the UN-GAELP and solicit more involvement from national/regional associations.

MARINE COATINGS

With ships sailing over every sea and docking in harbour as they like it makes all sense to treat items with Marine Coatings from the global perspective.

Since 2007, IPPIC was granted the status of official consultative NGO to the IMO (International Maritime Organisation - London). IPPIC supports three IMO (sub) committees through technical input and meeting participation:

- » the Marine Environment Protection Committee,
- » the Maritime Safety Committee, and
- » the Sub-Committee on Dangerous Goods, Solid Cargoes and Containers.

The IPPIC Antifouling Coatings Committee (AFCC) met in Marina del Rey, CA in January 2015. The meeting was well attended, with multiple representatives from Europe, Japan and USA.

The agenda covered issues of concern for the global antifouling paint business including:

- » Invasive species and bio-fouling
- » Review of activities of International Maritime Organization committees including those covering proposed restrictions on the use of biocides in polar waters and the



translocation of invasive species on ship hulls
» Anti-fouling efficacy
» Review of status of ISO Risk Assessment Standards proposed by IPPIC.

Every 2 or 3 years IPPIC organizes a Global Marine Coatings Forum. After having had 4 occasions in Asia the 2015 one was held in Rotterdam. See in the section on CEPE Marine Coatings. The forum tries to bring together the representatives of the stakeholders, legislators, ship-owners, etc.

TDG AND GHS OF CLASSIFICATION AND LABELLING OF CHEMICALS

The framework for these issues is defined on a global level by United Nations Sub-Committees of Experts. The results are then implemented into transport modal regulations and into national or regional legislation. With increasing globalisation of both business and regulations, it is more important than ever for IPPIC to be active in the international bodies to influence the rules at the top level, and to prevent disharmony which can be complex and costly for industry.

IPPIC is an NGO with consultative status at the UN Economic Commission for Europe, and as such participates actively in the Sub-Committees of Experts on Transportation of Dangerous Goods (TDG) and Globally Harmonized System (GHS) which meet in Geneva twice a year, as well as many of their delegated correspondence working groups. Following the conclusion of the 2013-2014 biennium, new editions of both the Model Regulations and GHS have been published and work is underway on the priorities of the 2015-2016 biennium. For more details of activities see the sections on Transport and Hazard Communication in this annual report.



CAN COATING

Are problems over or are they only starting?

What is the issue?

Coatings applied in food and beverage cans are in direct contact with food. They are exposing the population to possible residues through food and thereby they are exposing themselves to scrutiny. Due to lack of specific EU legislation, CEPE developed years ago a Code of Practice (CoP) for the use of acceptable substances. The Code was based on substances evaluated by at least one Authority at that time. However not all substances had been evaluated according to the latest guidelines of the EU Food Safety Agency (EFSA). In addition other elements came into play: the list of substances part of the CoP has not been updated in the past six years, the French ban on BPA-based coatings forced innovation from epoxy-based coatings to other technologies (such as polyester), Belgium and Netherlands are preparing national legislations to cover can coatings, the suppliers maintain confidentiality over the exact content of some of their products, the issue of NIAS (Non Intentionally Added

Substances) is on the table and the credibility of FACET (exposure tool) requires additional input.

What is CEPE's opinion?

CEPE maintains that the use of epoxy-based coatings is safe, as again confirmed this year by EFSA, while recognizing that the efforts realized by industry to develop alternatives requires a better understanding of what substances are currently in use. For many years, CEPE has called for EU wide harmonization of can coating legislation. However resources are lacking at the Commission level. Hence we are seeing the development of national initiatives. Once a Member State has developed a specific set of rules for can coating our industry will have to abide to these rules which will, by the effect of Mutual Recognition, become a standard for Europe. Our current problem is to identify which substances are needed to be listed in their national inventories and ensure that they have been evaluated to the required guidelines.

What has CEPE done so far?

The number of companies involved in this industry in Europe is very limited and hence resources are scarce. Despite this a few individuals (company members and national associations) have done a great job fighting all fronts. Our industry maintains an excellent relationship with the supply chain (can makers, food and drink industry, plastic industry, testing institutes, EU Commission) and is involved in direct support of the draft Belgian and Dutch national legislations. The number of meetings and representations are quite impressive.

What will CEPE do as next steps?

Recently the Can Sector Group has decided that it is necessary and urgent to update the list of substances actually in use in order to be able to help the discussions with relevant Authorities. In particular we aim at demonstrating that the majority of the substances currently used have been adequately evaluated and the others will be through national petitioning. CEPE will gather the confidential information from each member and issue a non-confidential list that represents the state of play of our industry. For the unknown compositions the CEFIC members will be requested to collaborate in a similar way.



ARTISTS' colours

The Artists' Colours (AC) sector has voted to continue with its current model of one business meeting and two separated technical meetings per year. The Technical Committee (TC) has grown in strength and engages actively with a number of topics including REACH (downstream uses and specific substance impacts), biocides, CLP and toy safety among others.

POTENTIAL RESTRICTION OF CADMIUM PIGMENTS IN ARTISTS' COLOURS

AC members provided valuable technical and statistical input to the public consultation by the European Chemicals Agency (ECHA) on a proposed restriction under REACH which would ban the use of cadmium pigments in artists' paints. Members also alerted artists and the media through publications and social media channels. Consequently around 700 comments were submitted to the consultation, the majority of which opposed the restriction. By March 2015 both ECHA's Risk Assessment Committee (RAC) and Socio-Economic Analysis Committee (SEAC) had adopted opinions stating that a restriction was not justified; the European Commission must make the final decision and at the time of writing this was not yet available, but we are optimistic that a restriction will not be adopted. The AC TC is monitoring several 'substances of interest' to provide early warning of any future regulatory actions, and is also considering the need for AC-specific REACH exposure assessment inputs to ensure Chemical Safety Assessments are realistic and not over-conservative.

PREVENTING LEGISLATIVE CONSTRAINTS THROUGH PRO-ACTIVE PRODUCT STEWARDSHIP

The consultation on cadmium pigments highlighted that the sector could do more to voluntarily promote practices which mitigate any environmental or health risks. The AC TC has therefore been developing a 'best practice' guideline on the use and disposal of artists' colours, to advise artists on the best ways to minimise releases and protect themselves whilst also optimising use of their materials. In a similar vein, the AC TC published a recommendation to AC members to communicate – via their websites, product literature or other medium as appropriate – about the presence of skin-sensitising biocides in water-based products and their potential to cause allergic reactions. This is important to ward off potential EU bans on essential preservatives; regulators expressed appreciation for voluntary action taken by the Decorative Coatings sector.

The AC TC will continue work on the development of a self-assessment questionnaire to support the AC Environmental Responsibility Code,

which will refer inter alia to the CEPE initiatives above.

The AC TC has given valuable input to the negotiations on labelling and packaging issues (see Hazard Communication article), including a proposal for labelling of small packages which leverages modern technology and the internet to aid communication. The latter will be pursued further in the context of Better Regulation and improving consumer information together with other formulating sectors. CEPE is also working closely with the European associations of the toy and writing instrument industries to monitor developments in the migration limits in the Toy Safety Directive 2009/48/EC.

RAISING VISIBILITY AND SATISFYING DEMANDS

There is very little perception in the public or supply chain that the AC sector works together and CEPE is virtually unknown in this context. The AC members are therefore considering a proposal for a more visible online presence as the CEPE AC sector, and the potential benefits that this could offer.



DECORATIVE coatings



ECOLABEL

Background

The EU Ecolabel criteria for decorative paints and varnishes were voted on 28 May 2014. A lot of discussions took place in the year following their publication to make sure the criteria could be used. In the end, the existing licenses have been prolonged until 28 February 2016 to give both competent bodies (delivering licenses) and dossier holders sufficient time to work on application dossiers.

What's been done so far, and what's the plan for the future?

The biggest issue was the measurement of semi-volatile organic compounds (SVOC). The voted criteria recommended the use of ISO 11890-2 (2013) for SVOC measurement, though it is not applicable to SVOCs. Two national groups in France and in Germany worked together with raw materials manufacturers and laboratories, which led to the publication of a CEPE guidance document on the determination of SVOC using ISO 11890-2 in April. ISO TC 35 will start its standardization work to adapt the norm in the

fall, but the guidance document can be used in the meantime for Ecolabel dossiers.

The second issue concerned the reclassification of substances: due to the on-going implementation of the REACH regulation, some substances are reclassified based on more recent data, making them unfit for Ecolabel product use. Derogation requests have been submitted for these substances and the process is still on-going. An example is ADH (Adipic-acid dihydrazide, CAS 1071 93-8), which is used as an adhesion promoter and a cross-linker both by paint manufacturers and dispersion manufacturers. As the substance was not classified, it did not appear in the safety data sheets of dispersions, and a lot of paint manufacturers were not aware of the issue.

PRODUCT ENVIRONMENTAL FOOTPRINT PROJECT

Background

As mentioned in last year's annual report, the evaluation and the communication of the sustainability of decorative paints over their full life cycle is now handled in the Product Envi-

ronmental Footprint (PEF) project.

What's been done so far, and what's the plan for the future?

Started in November 2013, this 3 years long project is progressing well. The project will deliver calculation rules, a detailed screening study, and will investigate communication vehicles for the business to business and business to consumer markets. For more information on the PEF project; see the sustainability section of this annual report.

INDOOR AIR QUALITY

Background

The CEPE Indoor Air Quality Task Force continues to monitor the developments on indoor air quality both at EU and national levels. Due to a low activity level and a strong focus on Decorative Paints, it was agreed in 2015 that indoor air issues would be handled by the Decorative Coatings Technical Committee instead.

What's been done so far, and what's the plan for the future?

So far in 2015, the only relevant activity took place at national level. In Belgium, a possible extension of

the scope of the Belgian decree on indoor air has been evaluated: the scope currently covers floor coatings and parquet varnishes, and the extension would include walls and ceilings. It is likely that the extension will take place in 2016. Lithuania also notified an indoor air quality scheme to the European Union in spring 2015.

CEPE hopes to minimize the damage of a European patchwork of decrees by advocating at the authorities of a Member State that considers an IAQ decree:

- » To allow for placing on the market of products with different classes on IAQ
- » The use of the CEN Test Methods
- » The use of the EU harmonized LCI values

CEPE continues to evaluate a reporting scheme that may be someday supported by the Standing Committee on Construction and which could offer a possibility to exert some harmonizing power towards national authorities.

A SURVEY ON THE CONSUMER USE OF DECORATIVE PAINTS IN EUROPE

We want to know how DIYers use our paint

CEPE carried out a European survey on consumer behaviour with decorative paints. You may wonder why we wanted to understand how consumers are using our paints since all required information for the safe use and their proper disposal is provided on the can label and, where necessary, on accompanying documentation? The answer is two-fold: refinement of values used for risk assessment and figures needed for life cycle analysis.

Under the European chemical legislation the industry has the burden of proof of safe use, both for human

health and for the environment. Generic scenarios and models are available to experts to estimate the exposures and calculate the risks, but they include figures that have typically not been derived on the basis of actual surveys, rather they have been estimated based on people's judgment. Such default values may lead to overestimation or simply their validity can be questioned. It means that in the future if the risk assessment of a substance based on default values shows unsafe use, the only acceptable refinement would have to come from robust data. A pro-active attitude towards a better understanding of the safety of our products is also part of our Sustainable Development Charter.

On the sustainability front, we had to have an idea on the left over and disposal of paint across Europe.

The survey

The survey was contracted out by a specialized consulting firm. In order to be robust a sufficiently large part

of the EU population had to be surveyed and we chose 15 EU Member States representing 92% of the total EU population. Within each of them 500 DIYers participated, which in total means around 7500 input. In order to develop the adequate study protocol and identify the relevant questions for the web-based survey, a new CEPE team of experts was created. The final questionnaire was translated in each local language.

The questions were developed around the following themes:

- » Paint patterns of use: type and frequency of paint jobs, length of paint job, quantity and type of paint used, motives for undertaking paint activities
- » Consumer perception on safety instructions and safety measures adopted during DIY paint jobs:
- » safety instructions, method of ventilation, protective clothing
- » Consumer behaviour of left over paint

The results

With these results CEPE is now the owner of:

1. Credible and robust data on paint-use patterns of DIY-ers in Europe that can be used as an input to exposure determinants for human health risk assessments
2. Data on how well safety instructions are read and followed
3. Data for the Product Environmental Footprint project (i.e. packaging materials; left-over paint)

No longer does our industry need to just accept default values for exposure determinants.

Some key-findings

- » Overall, DIYers exhibit similar DIY paint use patterns across Europe with no significant difference between age, gender or property ownership
- » On average DIYers undertake approximately 2 paint jobs per year across all types of surfaces and across

With increasing globalization of both business and regulations, it is more important than ever for IPPIC to be active in the international bodies to influence the rules at the top level, and to prevent disharmony which can be complex and costly for industry.

- all countries
- » The total weighted average of days per year that a DIYer spends painting is 6
- » In about 60% of the paints applied on walls, floors or ceilings, DIYers apply 2 coats
- » Over two thirds of respondents use water based paint, compared with 15% who use solvent based paint
- » The most valued factor driving a paint purchase is the quality of the product
- » 98% of DIY painters use rolls and/or brushes for paint application
- » Up to 30% of all purchased paint is left over in open cans/buckets at the end of the paint job
- » 91% of people are aware of the safety instructions provided on the DIY paint packaging
- » Nearly half (46%) of DIY painters wear protective gloves

What's next?

The report will be analysed for the derivation of new robust determinants used in risk assessment calculations. It will be used to update the SCEDs (specific Consumer Exposure Determinants – see the REACH section) and to update the paint factsheet of the model ConExpo.

KEY SUBSTANCES IN DECO

MEKO

Making up only a small percentage of a paint formula the substance Methyl Ethyl Ket-Oxime is used as anti-skinning agent in airdrying



alkyd-based paints. It is known to have a reversible health effect on the nasal epithelium. This topic is mainly driven by the German authorities and has two aspects.

1. Germany adopted a 'Lower Occupational Limit' (OEL) for MEKO. For applications where no personal protection equipment may be used, one cannot come to a safe use.

The German Paint and Ink association VdL did work with the German authorities on establishing real-life data of exposure on construction sites before the new limits were to be enforced.

Alkyd paint formulations with the typical amounts of MEKO did not meet the German OELs.

The German authorities and the professional painters will develop an exposure scenario for working with MEKO containing paints (inhalation protection when interior application).

2. German authorities will propose a more stringent classification for MEKO (Carcinogen 1B)

Although this classification is disputed by the producers the German authorities will submit the proposal to ECHA by year end. If this proposal would be adopted by the other EU Member States the topic under 1 becomes irrelevant while we can-

not use CMR 1B substances in consumer products.

What is next?

While German authorities are the dossier holder for MEKO their opinion and proposals will carry a heavy weight when it enters the discussion with other EU Member States. Before

the German limits and classification proposal become EU wide there are several procedural steps to be taken. The timeframe may be as long as 3 years. With all this going on and not knowing what the outcome will be, the CEPE members are advised to start looking for replacements which some suppliers are now offering.

Cobalt driers

Cobalt driers dossiers were submitted for REACH registration in December 2010 with no classification as carcinogen, mutagen or repro-toxic substances due to data gaps.

Since then the industry has been informed on the repro-toxic classification. No further official information from the Cobalt consortium has been received by CEPE.

However a recently published study confirmed that Cobalt metal is a lung carcinogen (1B). The underlying mechanism (ROS formation) will be used as an additional read across parameter for other cobalt compounds. The suppliers of cobalt driers are called to come with a final classification by year end.

As long as no other action has any ground, CEPE remains with its earlier stated recommendation to look for replacements for cobalt driers.

Project on Leaching from FACADES

A project on the leaching of dangerous substances from outdoor coatings

Help biocide suppliers secure the future of dry-film preservatives used in outdoor coatings

As stated in the biocide section, there are times when downstream users have to help suppliers secure the availability of chemicals. This is true under REACH, but also true under the biocide legislation. CEPE became involved in the issue of leaching of biocides initially to counter a possible development of adverse laboratory leaching tests under the Construction Product Regulation (CPR), and subsequently when we realized that biocide suppliers do not have the required information to support their products in our different types of coatings. The latter could only be done with CEPE members' knowledge and under CEPE coordination.

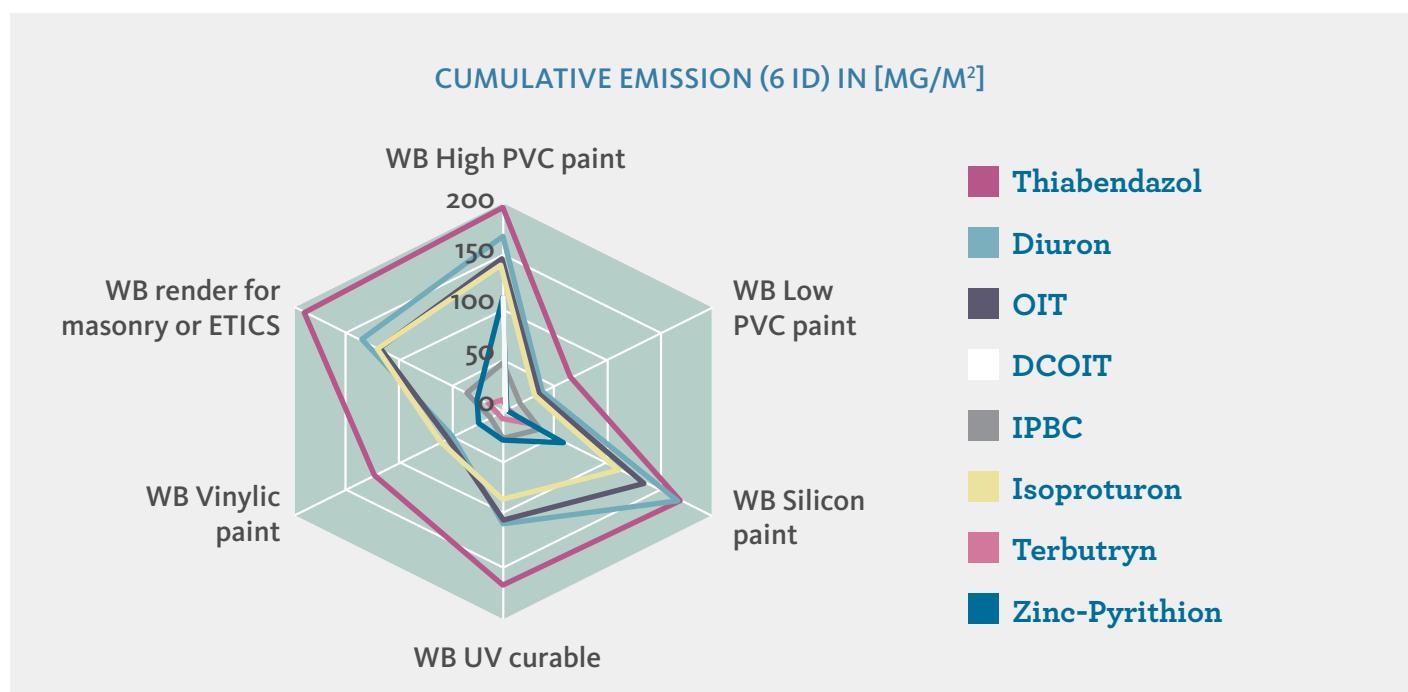
What has been done so far?

CEPE financed the conduct of two independent laboratory leaching studies according to the EN 16105 protocol (Paint and varnishes – Laboratory method for determination of release of substances from coatings in intermittent contact with water). CEPE members had identified 14 classes of representative coatings for the European market: 6 facade 'masonry' coatings, 5 wood stains and 3 wood paints. These were clearly characterized and the samples were prepared based on generic (non-confidential) compositions. Standard concentrations of the most representative dry-film biocides were added as neat products (no influence of biocide product formulation such as encapsulation).

The tests concluded that all active substances showed the same leaching pattern, i.e. all actives showed high or low relative emissions in the same coatings (see figure below).

What's next?

The first laboratory results were encouraging but were not sufficient to demonstrate that this is also true under real life conditions. The biocide suppliers were taken on board to finance the next step. It took 18 months of discussion to get to an agreement. One condition for them to decide to go ahead was that biocide authorities would have to show support for this initiative. Hence earlier this year CEPE presented the project in Helsinki to the environmental experts of the



rila). The study is expected to last at least one year, and probably two years.

What is expected from the semi-field study?

We hope to observe the same leaching trend under the outdoor conditions that will represent real life conditions including intermittent

rain, storm events, orientation, wind and light effects. This would allow identifying worst case coatings that will be used in the future by biocide suppliers to test their specific biocidal products and hence cover the leaching from any other outdoor coating in Europe.

It may also be possible to correlate la-

boratory and field data, which would lead to additional cost reduction.

What do we gain?

This CEPE initiative makes our industry more credible for future discussion on the leaching issue (reference made to the sustainable use of biocides, see biocide section). It helps secure the availability of dry-film products that we all need in resin based outdoor coatings. It feeds our understanding of the issue in different coatings. And if needed it would demonstrate that the intermittent exposure under the laboratory testing chosen is more appropriate than a permanent exposure, should biocide come again one day under the discussion of the CPR.





MARINE coatings

Between the water and the steel

Under this title the Marine Coatings group organized on April 23 and 24 a Global Forum in Rotterdam. It was held under the IPPIC umbrella with this time a focus on the situation in Europe.

Although Europe has a comparatively small industry for building new ships, it continues to have a very sizeable number of repair yards. And over 40 % of the world fleet is owned directly or indirectly by European companies (based in Greece, Norway, Denmark, Germany, Italy and the UK). Also the EU is considered leading in the field of legislation of marine coatings and their use. And important industry related bodies such as IMO and ISO are based in Europe as well.

Over 80 representatives of the marine industry and of some national authorities attended the Forum.

ANTI-FOULING COATINGS REQUIRE A BALANCED VIEW

During two sessions in the Forum the role, the regulations and the risk assessments for antifouling paints were discussed. CEPE has in the past year made national authorities aware of the potential danger of losing the marine industry as a result of the loss of effective antifouling paints. When effective antifouling paints do no

longer receive an authorization ships will choose to do their next maintenance round in shipyards outside of Europe where they still have access to the effective antifouling paints.

So not only the marine coatings business is in jeopardy, but the whole marine industry (equipment, repair yards etc.) which is worth some 80 billion € and employs some 500,000 people.

With performing the risk assessments for such authorizations the national authorities can choose the marine scenario (harbour or outside) and also may determine their own acceptable risk (protection goal). This is what the antifouling paint manufacturers fear will lead to a reduced number of approvals and will cer-

tainly hinder the mutual recognition between EU Member States.

SEE IT WITH YOUR OWN EYES

With the help of SEA Europe (association for shipyards and marine equipment) a special work visit for authorities was organized to a nearby shipyard where the practice of paint application, risk managements etc. could be seen. For most it was impressive to see the bottom of a hull and what the antifouling paints do in practice.

For antifouling paints authorities were called to take a balanced view of the issue. It is acknowledged that the negative impact of antifouling paints should be minimized but the benefits (reduction of CO₂ and inva-



sive species) should be maximized at the same time.

THE SERVICE LIFE OF THE INSIDE HULL

While antifouling paints are applied on the outside of a ship's hull the third session dealt with rules and procedures for paints that extend

the service life of the inside hull. Topics like Ballast Water Treatment and Crude Oil Resistance were discussed. The accompanying test methods and the certification schemes were presented.

What will CEPE's Marine Coatings sector group do as next steps?

In the spirit of the mutual appreciation from the Forum it is intended to meet with the national authorities in a dedicated workshop where the attendants can go into more detail of the risk assessment methodologies and protection goals.

POWDER COATINGS

LIFE CYCLE INFORMATION AS A CHOICE DETERMINANT

The outdoor performance of powder coatings has given it a solid place in many applications in the building industry. But durability in itself is no longer the sole choice determinant. Nowadays the quest for life cycle data has become important for architects and designers who want to build according to green building schemes (e.g. BREEAM and LEED). To become the material of their choice they look for Life Cycle data of a particular article or process. In the Netherlands the council for construction quality has set up a database for LC data and in Germany it becomes more common to have such data available via Environmental Product Declarations.

CEPE's Powder Coatings group is following these developments and considers appropriate collective actions to ensure that powder coated materials face delisting.

A SCREENING LCA ON THE ROLE OF POWDER COATING ON ALUMINIUM OUTDOOR FRAMES

Background

In March the sector group decided to use the available life cycle inventory data from the CEPE database to run a screening Life Cycle Analysis

on the impact of the coating in the life cycle of a powder coated aluminium window frame.

What's been done so far, and what's the plan for the future?

The study is finished and covers the full life cycle of a powder coated aluminium window frame, from extraction of raw materials, substrate preparation, installation and finally demolition of the building, and ran in spring 2015. The study included both a zirconium and a chromium based pre-treatment, and considered two lifetimes for the window frame: 30 years for a class I, and 50 years for a class II powder coating, to compare to a 50 year lifetime of a building. The conclusions of the study will be presented at the CEPE Annual Conference. One conclusion stands out if you look at the overall environmental impacts: the embedded environmental costs of your aluminium substrate are too costly to leave your aluminium without a coating. So it is more sustainable to protect the window frame well rather than having to replace it. The Powder Coating Sector Group will consider how to further use these outcomes in the relation with decision makers.

The Cr6 pre-treatment for aluminium

The most commonly used pre-treat-



ment for powder on aluminium used to be Chrome 6+.

Under REACH Cr6 is a substance of very high concern (Art. XVI) and has a sunset date for 21 September 2017. This topic has been discussed with the ESTAL association.

Still 50% of the alu-coaters companies in Europe use Cr6. The ones who have changed to non-Chrome alternatives have higher failure rates (after applying the powder coating) than with Cr6.

As there is no collective body of pre-treatment manufacturers and there is also no guidance to be found on, what are 'good replacements'? In particular the SME coaters with no time to experiment or cash (to afford an investment for anodizing as pre-treatment) will be in danger.

CEPE's opinion and actions

Overlooking the current situation the Powder Sector Group members believe that Cr6 cannot be defended. The only thing the CEPE powder manufacturers could do is to raise awareness with the coaters and urge them to invest in the finding of a Cr replacement.

PROTECTIVE coatings

GUIDANCE DOCUMENTS FOR THE INDUSTRY

The Sector of Protective Coatings issued this year 2 guidance documents.

Title: CEPE Response and Actions for EN 1090

The Construction Products Regulation 2011 requires manufacturers of construction products to provide a 'Declaration of Performance' (DoP) and apply a CE Mark to their products. This in turn requires the product to be controlled by a Harmonised European Norm (hEN) or a European Technical Approval (ETA). The steel fabrication industry has a hEN in place which makes a CE mark mandatory for their products.

Where a coating is applied to the steel the steel fabricator has to be made aware of the implications to his claims according EN 1090. CEPE issued a

guidance document in which steel suppliers and fabricators were informed on the impact of applying a paint layer on their claims under EN 1090.

Title: Use of Solvent in the Protective Coatings Sector

This guidance which is meant to provide the manufacturers of Protective Coatings with a better understanding of two topics that deal with solvents use:

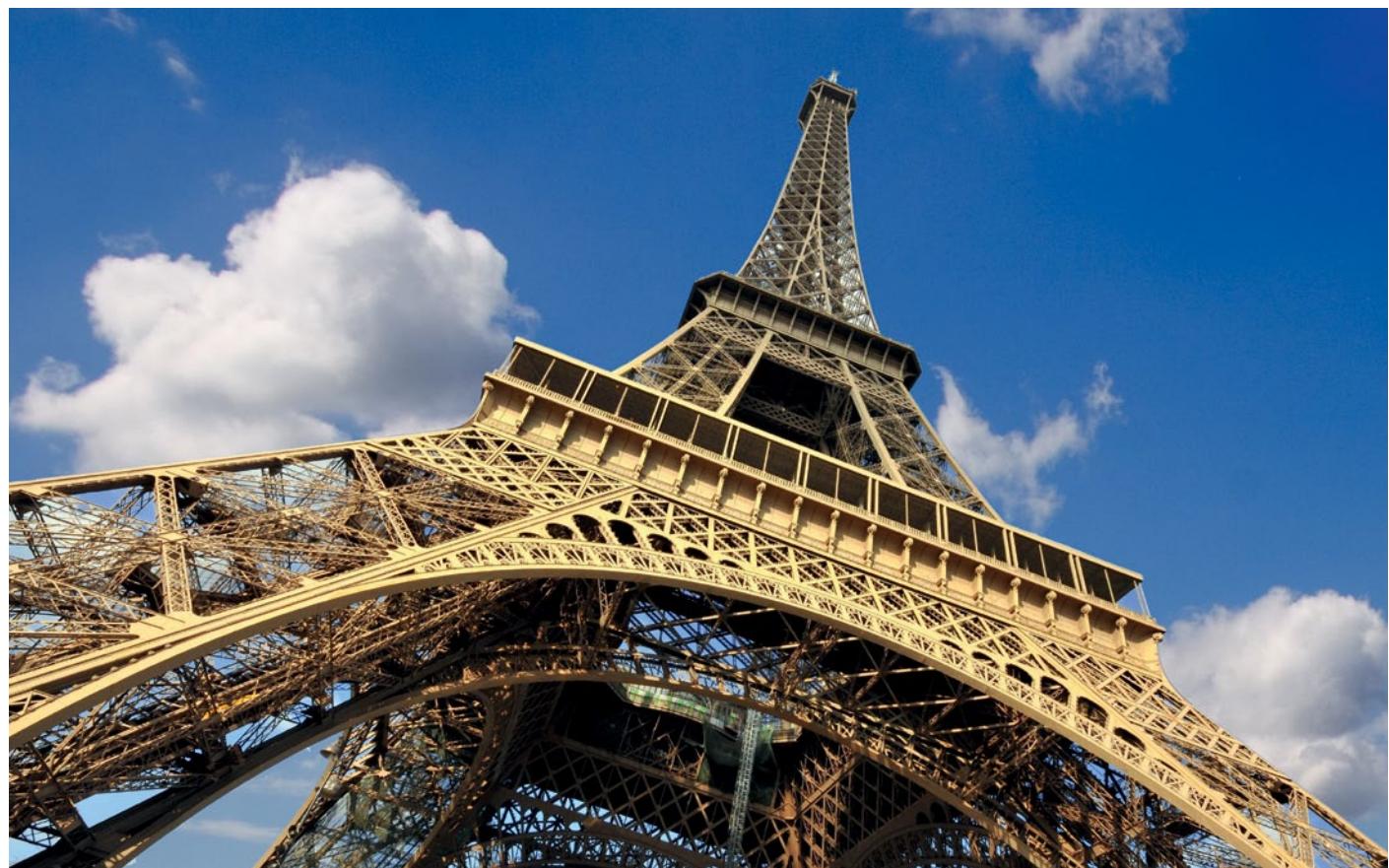
1. Clarification of where and how the Product Directive (2004/42/EC) applies in this Sector
2. Higher Solids contribute to Sustainable Protective Coatings

POTENTIAL RESTRICTIONS IN THE USE OF ISOCYANATE

The Technical Committee discussed in a sub-group the possible implication of a general EU wide restriction



of use to trained professional. It identified the most relevant products on the market and their possible content of free di-isocyanates above 0.1%. It may be possible to get an exemption for the 2-pack PU HDI-based coating because only the hardener contains >0.1% of free di-isocyanate. All the other products contain more in their final stage. For these an acceptable certified training scheme was discussed.



INTUMESCENT COATINGS

A harmonized EU Norm is a key requirement
for the growth of Intumescent Coatings



What is the issue?

At present, performance testing, assessment and approval of intumescent coatings is governed by national legislation and standards, which creates barriers to trade between Member States and requires manufacturers to incur heavy testing and approval costs in order to qualify their products for different countries and markets.

In many cases, the current situation means that where improvements are made in product performance and testing methodology, some countries fail to take advantage of these because of the time taken for local regulations to catch up, which may have safety as well as economic implications.

What has CEPE's responsible Working Group done so far?

Members of the Intumescent Coatings Technical Committee (ICTC) participated prominently in the development of EN 13381 Part 8, which has introduced test and assessment methodology specifically for intumescent coatings, resulting in

more accurate (and hence safer) thickness assessments for these products. More recently, members have been involved in the development of a voluntary intumescent coatings product standard, within

Working Group (WG) 13 of CEN/TC 139, which was finally published by CEN on 18 February 2015 as EN16623 : 2015. CEPE's lobbying for the conversion of EN 16623 into a harmonised standard within the scope of the Construction Products Regulation has received a positive reac-

tion from the Commission, and the process has commenced for issue of a mandate to CEN for this work. A draft mandate issued to CEN's Technical Board in August 2014 was apparently well received, and feedback suggests that the Board would be willing to take on the mandated project work. Since that time, however, a joint meeting of CEPE and the EAPFP with the Commission in December 2014 explored the possibility of extending the scope of the mandate to include additional fire protection product types, also substrates and components other than structural steel (for example timber and concrete constructions). This proposal was also favourably received so a formal briefing note has since been prepared and sent to the Commission. Their official response is now awaited.

WHAT WILL THE WORKING GROUP DO AS NEXT STEPS?

1. Mandated harmonised standard

On the advice of CEN, work is already in hand to plan the structure of the mandated standard, and work

on preparing the document will continue once the proposed structure is approved.

2. Related Standards work

The scope of the EN 13381 suite of standards is being extended, with Part 9 – covering fire protection of beams with web openings – already issued for formal vote in February 2015. Members are still involved in debate regarding the methodology for Part 10 – covering solid bar and rod in tension.

3. Promotion of

Intumescent Standards

EN 16623 is currently a voluntary standard covering product testing, manufacture, specification and inspection. Whilst ICTC member companies have adopted this within their standard practices, along with a commitment to voluntary certification by reputable third party expert bodies, it is not known how many manufacturers outside this group will adopt these standards. Measures are therefore being taken to promote the use of EN 16623 and third party certification to manufacturers who are either non-members or inactive members of CEPE, and also to those certification bodies who have not already adopted the EN standard. Letters and briefing documents are being drafted, to be delivered directly and also locally via the National Associations of CEPE. The letters will explain the benefits of adopting the voluntary standards as a means of preparation for the forthcoming mandatory requirements.

4. Improving standards in the application of Intumescent Coatings

While the above activities are

focused mainly on the manufacturers of intumescent products, no recognised EU-wide guidance exists for the applicators of intumescent coatings. Control of application standards is extremely important for these products, so the ICTC have produced – in conjunction with the EAPFP and EAIPC (Associations representing paint users and manufacturers / installers of fire protection products, including intumescents) – an Applicator Best Practice Guide for Intumescents. This document

is now being promoted to their members by all three associations in an effort to improve the standard of application of our products and the competence of the applicators. Further measures to publicise this guide more widely are under consideration, and it is hoped that it may form the basis for a formal European standard in due course.

What benefits will the industry gain from these activities?

The adoption of uniform standards

across the EU will provide a 'level playing field', ensuring that best practice is being undertaken in all Member States in all aspects of intumescent paint specification and use. These measures should result in improvements in fire safety as well as economies in testing and assessment costs.

A willingness to adopt voluntary controls and third party scrutiny will give specifiers and facility owners confidence in the integrity and transparency of this industry.

Active Standardization bodies for Paints

WG 1
Coating systems
for masonry

WG 2
Coating systems for wood

WG 7
Paints & varnishes
for wood furniture

WG 8
Powder organic coatings for
hot-dip-galvanised steel products

WG 1
Volatile Organic
Compounds

WG 2
Terminology

SC 9
General test methods
for paints and varnishes

CEN TC 139:
PAINTS & VARNISHES



WG 9
Testing of
coil coated metals

WG 10
Microbiology and
leaching of substances

WG 13
Reactive coatings for
fire protection

WG 12
Test methods & interpretation
of test results of corrosion
protection systems

WG 11
Sampling, conditioning and
testing of paints and coatings
according to the needs of CEN
TC351 / WG2, Indoor air

SC 10
Test methods for binders
for paints and varnishes

SC 12
Preparation of steel substrates
before application of paints
and related products

SC 14
Protective paint systems
for steel structures

ISO TC 35:
PAINTS & VARNISHES



CEPE Board members

The European Council of the Paint, Printing Ink and Artists' Colours Industry strengthens the position of the paint, printing ink and artists' colours industries in Europe. It is run by a Board of 15 company representatives.



ALAIN BARONNIER, AXALTA COATINGS

Since 2013-12-01, Vice President of Axalta Coatings Europe (Europe Middle East & Africa), located in Cologne. Joined DuPont de Nemours (Engineering Polymers) at the end of the 80's in different Sales, Product Management positions while attending Finance and Business courses at Paris. Worked in 5 different divisions. Joined DuPont Performance Coatings business in summer of 2008 as Global Powder Business Director till end of 2009, where after European Marketing Director in 2010 and Automotive OEM Global Business Director till November 2013.



MARC DE POTTER, AALTERPAINT

Since 1997, he joined Aalterpaint as General Manager. Aalterpaint is a family owned company and produces industrial, protective and powder coatings. Mr De Potter fulfilled several management positions in the oil industry in Belgium and abroad. He holds a PhD in chemistry from the University of Ghent. He is a member of the Board of IVP (Belgian Paints and Printing Inks Association) and is Vice-President since 2007.



ERKKI JÄRVINEN, TIKKURILA

The manager has worked as President and CEO of Tikkurila since the year 2009. In the past, his functions included President and CEO of Rautakirja Oy, a Finnish-based retail company with a turnover of EUR 850 million, which is active in Finland, the Baltics, the Netherlands, Germany, Russia, Romania and the Czech Republic. Also from 2009 onwards, Erkki Järvinen has been Vice Chairman of the Finnish national organization. During the last years, Erkki has repeatedly given presentations at CEPE conferences.



MICHAEL JORGENSEN, BECK & JÖRGENSEN

CEO of Beck & Jorgensen, has been Member of the Danish Coatings and Adhesives Association since 1984. In 1986, Jorgensen became a Board member of the Danish Association. Since 2010 the coatings industry manager has been Chairman of the Danish Association.



HARALD BORGHOLTE, BASF COATINGS

April 1991:

joined BASF
» Vice President, Strategic Marketing & Product Development BASF. Member of the Global Senior Steering Committee
BASF Coatings GmbH. 23 years in the Coatings Industry in various fields
» Vice President Strategic Planning Coatings
» Vice President Global Business Management Automotive Refinish
» Director Technology Management Automotive Refinish



HERBERT FORKER, SIEGWERK DRUCKFARBEN

Since august 2002, CEO of Siegwerk Druckfarben AG & Co. KGaA. Prior to his assignment at Siegwerk, he was President and CEO of Tesa Tape Inc, Charlotte, NC, USA. He served also in several management positions with Beiersdorf. Since 2004: Member of the Eupia Council Former, member of the German Paint and Ink Association (VdL), Former member of the CEPE Board (2006-2012)



CARLO JUNGHANNS, J. COLORS SPA & ARSONSISI SPA

who was born in the year 1951, holds a degree in Political Science and Marketing. Representing the third generation in a family of entrepreneurs, Carlo Junghanns joined the family company in the early 1970's. During more than 40 years, he has concentrated on promoting the firm's expansion through a series of acquisitions and developments aimed at strengthening positions in both the decorative paints and colorants business and the industrial coatings sector. He has been an active participant in the Italian coatings trade-association AVISA and since 2010 has been involved in the industry association Assovernici of which he was a founding member.



FELIPE MELLADO, SUN

Chief Marketing Officer for Sun Chemical, joined the company in 1988. He earned a Masters degree in Electrochemistry in 1977 and an executive MBA in 1998. He began his career in 1979 as a research chemist in Coates Brothers (UK). In 1988 he joined Sun Chemical. He held the position of Technical Director in various countries as well as those of Operations Director and General Manager prior to being appointed Corporate Vice President in 1999. From 1999 until 2008 he held the position of VP of Marketing and Technology for Sun Chemical Europe. In 2008 he was appointed Chief Marketing Officer with global responsibilities for marketing. In December 2009 he was elected Board Member for Sun Chemical Corporation.



FRANCISCO PERELLO, VALRESA

Vice president of ASEFAPI was born in Valencia in 1960. He is married with 3 children. Francisco Perello studied business Administration at Valencia University. Since 1989 he works for Valresa, a family-owned company, in different positions and currently, as CEO. He is also President and Vice-President of Valresa's subsidiaries in Mexico and Turkey. Valresa is specialized in industrial wood coating business. It was established in 1965 in Valencia with the aim of developing, producing and marketing coatings. The group has production plants in Spain, Mexico (1995) and Turkey (2008) and export wood coatings over 20 countries.



MARLIES VAN WIJHE, VAN WIJHE

is CEO of the family-owned company Van Wijhe Verf B.V., which is mainly active in the Deco sector, since 2000. Born in Zwolle in 1965, she holds a master degree in Business Studies from the University of Groningen. Her industry representations include: Chairperson of the Dutch paint and printing ink association, VVVF (Association of Paint and printing ink Manufacturers); member of the general board of VNO-NCW (the Dutch Employers Association); member of the general board of VNCI (The Netherlands Chemical Industry Association); member of several platforms in the construction industry. Marlies van Wijhe gained recognition as "Businesswoman of the year 2010".



HENNER STRATEN- WERTH, FEIDAL

CEO and owner of FEIDAL, Germany joined the company in 1965. Over the years, he has held various positions in sales, before managing the coatings manufacturer's business activities. Born on 8 October 1944, Henner Stratenwerth holds a degree in Sales. The German manager is actively involved within the German association "Verband der deutschen Lack- und Druckfarbenindustrie" (VdL): He is Chairman of the Committee for SME's as well as delegate from VdL into SME Council of the German association VCI.

CEPE BOARD MEMBERS

Board members for RE-ELECTION



JACQUES MENICUCCI, ALLIOS

Born in New York (USA) in 1953 from French parents, he settled in France at Marseilles. Joined Allios Paint Company in 1978 after graduating from Marseilles Business School (ESCAE), completed with a financial diploma DECS. Today CEO of Allios Paint Company, he is mainly in charge of Business Development which concerns National Domestic activity and moreover International Development. Allios Paint Company is mainly involved in the Deco paint market through Professional or Do-It-Yourself distribution networks. Allios is a family owned company, more than 150 years old. Sales are around EUR 60 million and Allios employs 330 persons. Jacques Menicucci has been involved for many years with France's national paint Association FIPEC and served on the CEPE Board from 2004-2010.



JEAN-MARIE GREINDL, PPG

J.-M. Greindl has graduated Cum Laude as Commercial Engineer from the Université Libre de Bruxelles (ULB) in 1987. He joined Petrofina in Belgium where he held several marketing positions. Since 1999, he entered the paint business; first as General Manager at Polifarb in Poland; then as President of the French affiliate of the SigmaKalon Group where after several years he became active as the Director of the Southern European region. Since 2010 he is a member of the European Leadership Team and Director of PPG Industries, s.a.r.l. VP PPG Automotive Coatings, EMEA. He acted in 2009-2010 as Vice-President of the French paint association.

NEW Board candidates at GA 2015



RUUD JOOSTEN, AKZONOBEL

Member of the Executive Committee responsible for decorative paints AkzoNobel.

Past functions:

- » Jan. 2011 - May 2013: Managing Director Pulp and Performance Chemicals AkzoNobel/President EKA Chemicals AB
- » Jan. 2008 - Jan. 2011: Managing Director Decorative Paints North East Europe AkzoNobel
- » Jan. 2006 - Jan. 2008: Managing Director Decorative Paints Europe North AkzoNobel
- » Jan. 2001 - Jan. 2006: General Manager Trade Decorative Paints AkzoNobel, the Netherlands, Belgium, Spain and Italy
- » May 1996 - Jan 2011: Marketing Director Decorative Paints AkzoNobel
- » May 1988 - May 1996: Various Sales and Marketing Jobs in Sigma Coatings (PPG)



ANDRÉ VIEIRA DE CASTRO, ARAGOL

Current function/responsibilities: Chairman/CEO since 2007 of a 4 mio € company with no more than 35 co-workers. 2 sites, water based in Leiria (120km south of Lisbon), solvent based in Famalicão (30km south of Oporto), main responsibilities in Strategy and New Business Developments, team motivation, leadership, recruitment, institutional representation, community lobbying, ...



EU Sector Group Chairmen



CAN COATINGS

Roald Johannsen

General Manager

Packaging Coatings EMEA

PPG Switzerland



COIL COATINGS

Pasi Niemisto

The Vaspar Corporation

Finland



DECORATIVE COATINGS

Thierry Destruhaut

Associate Director

Technical Marketing & Innovation

PPG Architectural Coatings

Amsterdam, NL



MARINE COATINGS

Bjorn Tveitan

Sales Director Marine

Scandinavia Jotun Coatings,

Jotun A/S, Norway



POWDER COATINGS

Bjorn Karlsen

Jotun Powder Coatings (N) AS

Larvik, Norway



ARTISTS COLOURS

Nils Knappe

Managing Director,

H. Schmincke & Co. GmbH & Co.KG

Erkrath, Germany



PROTECTIVE COATINGS

Gerard de Vries

AkzoNobel,

The Netherlands



VEHICLE REFINISH

Peter Maassen van den Brink

Valspar

Netherlands



PRINTING INKS

Felipe Mellado

Corporate Vice President

Marketing & Technology,

Sun Chemical,

Alcala de Henares, Spain



**EU SECTOR
GROUP
CHAIRMEN**



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