

CEPE

ANNUAL REPORT 2014

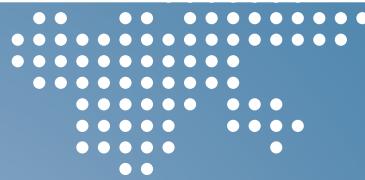


TABLE OF CONTENTS

- 3 EDITORIAL BY JAN VAN DER MEULEN, MANAGING DIRECTOR, CEPE
- 4 REASON TO ACT
- 5 SUSTAINABILITY
- 7 PAINT FORMULA STEWARDSHIP 2020
- 8 REACH
- 10 HAZARD COMMUNICATION
- 12 NANOTECHNOLOGY IN THE COATINGS AND INKS INDUSTRY
- 14 BIOCIDES
- 16 INDOOR AIR QUALITY
- 17 EDUCATION
- 18 TRANSPORT

- 20 IPPIC
- 22 EUPIA ANNUAL REPORT 2014
- 27 ARTISTS' COLOURS
- 28 CANCOATING
- 28 DECORATIVE COATINGS
- 30 MARINE COATINGS
- 32 POWDER COATINGS
- 32 PROTECTIVE COATINGS
- 33 INTUMESCENT COATINGS TECHNICAL COMMITTEE
- 34 CEPE BOARD MEMBERS
- 38 EU SECTOR GROUPS AND THEIR CHAIRMAN

CEPE ANNUAL CONFERENCE 2014 IS SPONSORED BY:



MASTHEAD

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Layout:
Vincentz Network
www.european-coatings.com
Printed by: BWH GmbH,
Germany © by CEPE



DEAR READER,

This annual report made public at CEPE's Annual Conference and General Assembly 2014 compiles in detail the issues where the industry experts have worked on. The main ones in terms of 'efforts spent' and 'impact to our industry' are highlighted here.

THE EU MARKET

The long winter in early 2013 caused a drop in the demand for the decorative coatings. It had its effect until the end of the year with an overall drop in volume across all EU Member States. The first signs for 2014 do show a positive trend. Even the Member States which have been most hard hit report slight improvements for the first time since 2008. The 2013 volumes for professional and industrial paints ended below the 2012 results.

Printing inks volumes for news and publication saw a further drop during 2013. But also the inks for packaging could not hold up their volume.

SUSTAINABILITY IN THE PAINT INDUSTRY

This topic continues to draw much of CEPE's attention. This year a start was made with a 3 year pilot project facilitated by the EU Commission called Product Environmental Footprint (PEF). It investigates how robust and reliable parameters can be developed for decorative paints so that a real comparison of products and their impacts can be made. Developing such Product Category Rules is a conscientious job with making many internal evaluations on pros and cons. If successful this project may help our industry communicate sustainability in an unbiased way.

More sectorial projects are starting inside CEPE as well. The protective coatings group finished its first Life Cycle Analysis on the use of paints on a bridge.

CEPE's Life Cycle Inventory database and the accompanying Eco-footprint tool have been introduced via several workshops and many CEPE members can make their own calculation. A second version of the database is due before yearend.

LEGISLATIVE IMPACTS

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.

The way in which we communicate on the hazards of our products (exposure scenarios) continues to be a topic of debate. An increase in administrative burden coming towards us is the harmonized reporting to Poison Centres. In order to help victims who misused our products or had an accident with them these agencies claim to need a lot more information from the producers.

INNOVATION

To maintain a competitive position in the world and to improve profitability it remains one of our most important assignments to innovate. The coatings of the future will need to show more functionality (energy efficiency, actively cleaning air etc.). For sure the use of nano-materials will have a place here. CEPE will continue its dialogue with authorities to not burden such new developments with disproportionate rules.

EDUCATION

In the past year CEPE's task force on Education has worked together with ITECH in Lyon to start with an English master programme for paint and ink chemists. The students entering the programme will receive scholarships from several paint companies. For sure this is a topic to have our industry further involved in the years to come.


Jan van der Meulen
Managing Director, CEPE

PHOTOS

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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 – IPPIC).

SUSTAINABILITY

CONTEXT FOR INDUSTRY

In the last few years, sustainability has risen from a background concern to a high priority on many different levels. The European Union (EU) is clearly indicating its desire to lead the transition to a green economy, and to start it now. Since 2011 sustainability publications and positions from the EU are coming in frequently:

- » Development of Product and Organisation Environmental Footprint methodologies (PEF and OEF);
- » Publication of the "Roadmap to a Resource Efficient Europe";
- » Draft of the 7th European Environmental Action Programme (EAP);
- » European Union's position on the bioeconomy and biodiversity

Some individual Member States are also pushing for sustainability to move forward at a faster pace, for example in France, where environmental reports are now mandatory for construction products.

Finally, direct customers are regularly asking for the environmental impact of articles they buy.

CEPE is dedicating a lot of time and resources to enable associations and their members to respond with confidence to questions concerning the environmental impact of the life cycle of paints and printing inks, and to follow very closely environmental topics such as bio-based materials. At the 2012 General Assembly in Seville, Spain, the CEPE members unanimously adopted a Charter for Sustainable Development.

ed annually by the CEPE project team to identify the need for a revision of data or the inclusion of new raw materials databases.

The CEPE Ecofootprint tool

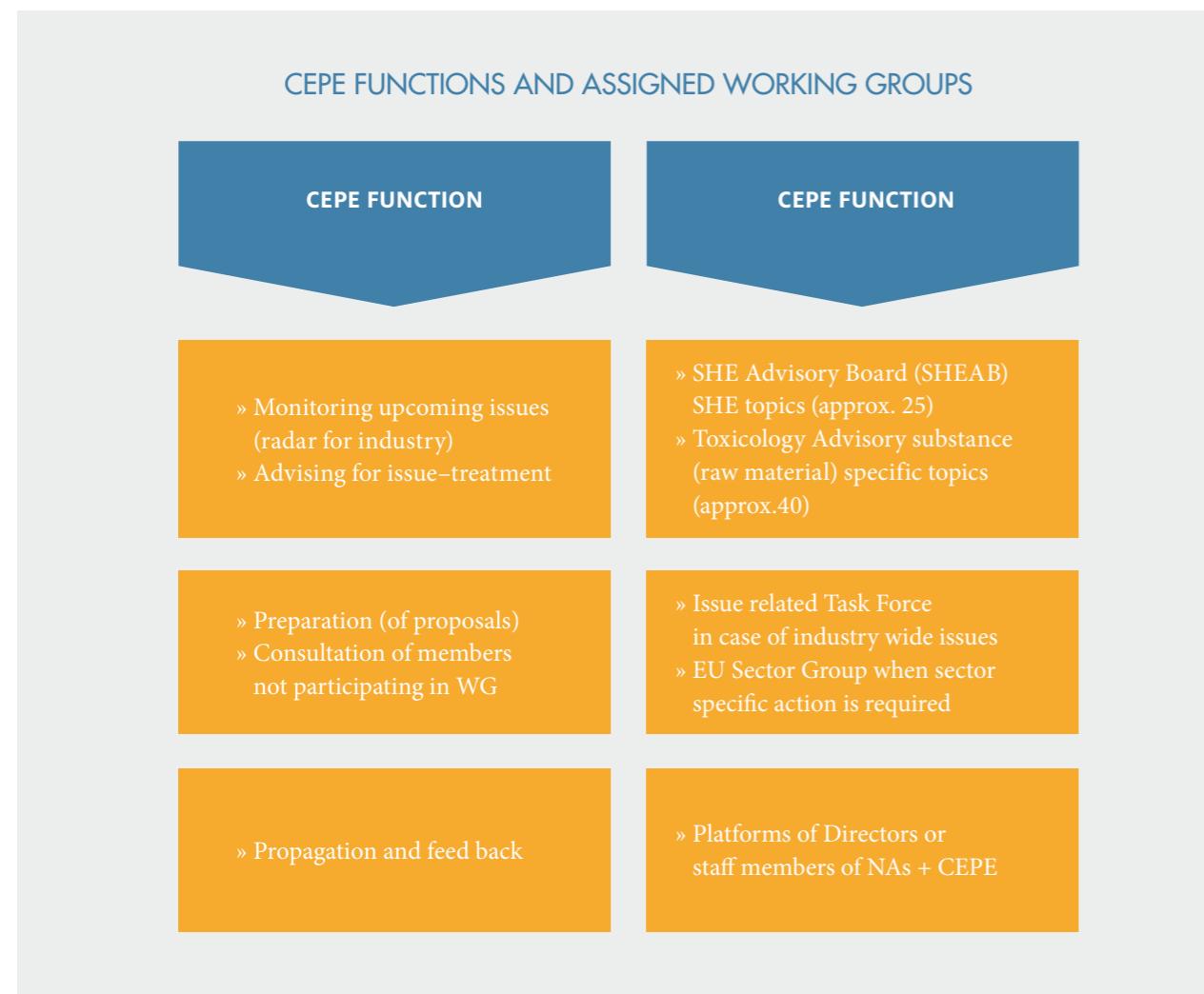
To make the LCI databases accessible to newcomers in the field of environmental assessment, particularly to SMEs, CEPE developed an easy to use Ecofootprint tool. The Ecofootprint tool is as a web-application that enables companies to calculate Ecofootprints or Carbon footprints of their products using both the manufacturing and the raw material databases.

Use of the deliverables

The database can be used by individual companies or sector groups to:

- » Work on Life Cycle Assessments;
- » Identify hotspots;
- » Develop Environmental Product Declarations (EPDs, which are a way of communicating the environmental impact of products according to the standard EN14025)

A few national associations have organized workshops or webinars to advertise the Ecofootprint tool and help their member know how to use it. The British webinar is available on the CEPE sustainability webpage. →



CEPE LCI PROJECT – CRADLE TO GATE

In July 2013, CEPE published its first version of the LCI database and Ecofootprint tool with an update foreseen in the fall of 2014. The database covers all of the CEPE sectors from cradle to gate, meaning from the extraction of the raw materials to the paint coming out of our plants.

The Life Cycle Inventory (LCI) database

The LCI database contains two parts. The first part of the database is a paint and printing inks raw materials database. The most important raw materials (over 260 of them) from all CEPE sector groups were collected to be included in the database. The second part of the database compiles paint manufacturing data, collected directly from member companies' sites (solventborne, water borne and powder coating). A reference manual detailing the methodology used during the project and the source of data is also available. The LCI-database will be review-



THE NEXT STEP – COVERING THE FULL LIFE CYCLE, GATE TO GRAVE

Several CEPE paint sectors now need to build-up LCI data on the steps taking place once paint leaves the factory (transport, use phase, end of life).

Some sectors have started work on the gate to grave part of their life cycle. The protective coatings group has studied the differences of impact of bridge systems; the powder coatings group is collecting data to start a study on aluminum window frames, and the coil coatings group is in the early stages of creating a sustainability sub-committee. See the sector pages of the report for more information on these developments.

DECORATIVE COATINGS – PEF PILOT PROJECT WITH THE EUROPEAN COMMISSION

The decorative coatings group will work on what happens after the paint factory as part of a much broader project, the Product Environmental Footprint (PEF) pilot project. This pilot project is a three years project which has started in November 2013. Its aim is to test the European Commission methodologies on Product and Organization environmental footprint by using them to develop product- and sector-specific rules. CEPE and decorative paints are now part of the 26 products and sectors involved, including detergents, some construction products (e.g. metal sheets, pipes), food and feed etc.

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 diffe-

rent 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 CEPE has applied to be a part of this pilot.

The pilot is led by the Technical secretariat (TS), chaired by CEPE and composed of six CEPE member companies, joined by two raw material trade associations, for industrial minerals and plastic polymers.

CEPE is excited to be a part of this project, which has a high visibility, both politically and scientifically. The obvious reason is that testing a methodology before its potential implementation in policy allows us to ensure it works for our sector. But it is also a great opportunity to show the work CEPE has conducted in sustainability, and demonstrate our will to know our products better from an environmental perspective.

After almost a year of work, the deco paints pilot has made good progress. The scope of the pilot has been clearly defined: indoor and outdoor wall paints, together with indoor and outdoor trim paints will be covered, representing over 80 % of the market. All the life cycle stages of the paint have been considered so far, except for the demolition of the building the paint is applied on, and packaging will not be forgotten.

Some challenges have already arisen. Technically defining the durability of paint is complicated in itself, even more when the effect of trends, moving house etc. have to be taken into account. Additionally, as this process is led by the European Commission, the group wishes to ensure that positions taken reflect the entire decorative coatings sector, not a limited group of sustainability experts. The decorative coatings sector group and technical committees have been and will be involved whenever necessary.

NATIONAL ASSOCIATIONS ARE ALSO ACTIVE ON SUSTAINABILITY

CEPE is not the only one working on sustainability, demonstrating again the importance of the topic for our industry.

The Dutch association VVVF has been quite active. On top of using the CEPE LCI data to improve the quality of the paint information in their national green building database, the VVVF has signed an agreement with FOSAG (the Dutch painters association) in 2012 to achieve sustainable maintenance of building and infrastructure. In July 2014, they have this time agreed with FOCWA (the Dutch car repair association) how to measure the sustainability of car repair coatings and their applications, also using the CEPE database.

The French FIPEC, German VdL and Swiss VSLF are all working on generic EPDs, either new or revised.

Bio-based materials are also a topic of interest for the British BCF, VVVF, and Italian Assovernicci. CEPE is following standardization developments in this field too, and has just started cooperating in the Ecobiofor project on sustainable solvents.



'PAINT FORMULA STEWARDSHIP 2020'

Under this title the CEPE Board initiated a policy that is currently under evaluation with the CEPE Paint-producing members. It aims at the elimination of substances of greatest concern from paint formulas by the year 2020. CEPE members would commit to have their paint formulas free from substances that have a recognized adverse effect on humans or the environment (classified as CMR 1A+B, PBT and vPvB*).

So why?

There are some generic and some specific legal instruments (REACH, Carcinogens and Mutagens at Work; BPR) already working in this direction. Does it then make sense to do some extra?

The CEPE Board believes that this initiative will stimulate a pro-active behaviour and so prepare the members for work they have to do anyhow for REACH and it helps them to avoid any postponement till the last official date for Substances of Very High Concern which may go as far as 2025. As the CMR 1 A+B substances will anyhow become restricted in a few years as a result of REACH, a CEPE policy which includes the reduction of CMR1's would in essence mean a bringing forward of the date of 'no longer use' for these substances. The CEPE members would with it also continue to commit to 'safe use' for own employees and for clients. In fact it demonstrates that CEPE members take their Sustainable Development Charter serious.

Fits or aligns with other relevant voluntary initiatives

Such initiative may be new for some segments in our industry, but others are already adhering to it for several years.

» EuPIA, the printing ink sector of CEPE, has for several years maintained an exclusion list of substances (including Cat. 1A/1B CMR substances) that ink producers should avoid in their formulations.

» Coatings Care or Responsible Care Programmes which monitor the industry's usage of CMR 1s. Companies report their indicators to the NA. These Programmes are already active in some National Associations.

» European Eco label criteria for decorative indoor and outdoor paints favour the omission of CMRs.

Who would be impacted?

This depends on where the respective substances are used. The Deco sector for example is already legally bound not to use the CMR1's while they supply to the general consumer. But for the professional and industrial paint sectors it is not forbidden to still make use of these substances. So sectors like protective coatings, general industry, marine coatings, vehicle refinish will have to reformulate when CMR1's are still in the formulations.



Throughout all paint sectors use is still being made of Persistent Bio-accumulative and Toxic (PBT) and very Persistent very Bio-accumulative substances (vPvB). When the policy would be adopted it would mean that replacing these substances would also include the Deco sector.

How to monitor progress?

Compliance to this initiative should be with a minimum of administrative burden to the members.

CEPE will request the support of the National Associations to ask their members annually to respond to a simple questionnaire on trends in volume use and on foreseen phase out date.

The anonymous results will be reported to CEPE.

The CEPE SHE Advisory Board

to address questions and comments

As mentioned above this is still a proposal and the CEPE members are invited to give their comments on this proposal. In order to allow for serious considerations by as many as possible, the CEPE Board has postponed the original deadline. Some comments received so far deal with

» How to deal with non CEPE members?

» What about imports?

The SHE Advisory Board will receive such comments and respond to the validity of them.

*CMR substances; Carcinogenic, Mutagenic or toxic to Reproduction; PBT and vPvB substances; Persistent Bio-accumulative and Toxic and very Persistent very Bio-accumulative substances.



REACH

FOCUS SHIFTS TO SMEs SUBSTANCE EVALUATIONS AND SAFE USE

REACH (Regulation (EC) No. 1907/2006) is now eight years old, and two of its three deadlines for registration of substances are already behind us. To date no significant change has been seen in the availability of chemicals on the market, but for the third and final deadline in 2018 low-tonnage substances (1-100 tpa) come into scope: the European Chemicals Agency (ECHA) expects around 70 000 registrations for some 30 000 substances, many of which will be submitted by SMEs. At ECHA there is now a specific focus on ensuring that smaller companies are aware of their REACH obligations and taking steps to support compliance by 2018 registrants. CEPE's REACH Panel will monitor any threats to the availability of important raw materials.

The registration of substances was an important step but only a first step. REACH may start impacting the chemical environment when Member States Authorities start looking into the registration dossiers.

EVALUATION OF REACH DOSSIERS

Under the Community Rolling Action Plan (CORAP) Member State Authorities have now evaluated most of the first round of substances selected under the CORAP 2012

list. For most, additional information has been requested to the Registrants, who typically have one or two years to fill in the gaps. The data can be in the form of new studies (including information on endocrine effects) or in the form of new exposure information to carry out new risk assessments for human health and/or for the environment. In 2013 the MS Authorities evaluated 47 substances, of which 22 are of interest to the CEPE members. The full outcome of the evaluation is not always accessible, as some Member States decided to wait the final stage of the review, and companies wishing to obtain more information should address their questions to their suppliers.

The CORAP 2013 and 2014 lists are available. There are now 201 substances selected for evaluation between 2012 and 2016, 76 of which are of interest to the CEPE members. Examples of substances added in the 2014 list: Pin-2(10)-ene (CAS 127-91-3), 4-tert-butylphenol (CAS 98-54-4), 2,3-epoxypropyl neodecanoate (CAs 26761-45-5), 2,2'-oxydiethanol (CAS 111-46-6), Napthalene (CAS 91-20-3), or Oxirane, mono[(C12-14-alkyloxy)methyl] derivs (CAS 68609-97-2). Each year a new list will be published making this a continuous process.

The evaluation of a substance may require more information from the users in order to refine the risk assessments. CEPE has been contacted for some substances and will continue to provide input. It is important to collaborate as downstream users to make our best in order to secure future availability for our uses.

The REACH and CLP regulatory status of substances of interest to the CEPE community is available to the members on the CEPE extranet in the form of an Excel sheet and is continuously updated.

AUTHORISATION OF DANGEROUS SUBSTANCES UNDER REACH

The first authorization under REACH has been granted in January 2014 to Rolls-Royce who had an essential need of a phthalate for the manufacturing of aerospace engine blades. This is expected to be the first of a long series. Indeed, further substances will be prioritized under the 2020 SVHC roadmap that intends to identify all substances of very high concern by that deadline. Although the Authorities have no numerical objective, it may well be that more than 1000 substances will be identified as SVHC, which will potentially

drive them to the route of Authorization or Restriction. The identification criteria are of course based on CMR classification, but the sensitization and endocrine disruption aspects are of growing concern (Art 57(f) of REACH). The endocrine disruption subject is still very hot. In particular the EU Commission had to propose criteria for the identification of ED substances by end 2013 under the Plant Protection and under the Biocide Regulations. It is only recently that they published their roadmap for the identification of EDs, which is expected to come under public consultation in 2Q 2014. The impact on substances covered by REACH is still uncertain, but we can guess that overall industry will have a difficult time with substances that are suspected to be EDs because it is not easy to 'prove to be innocent' when no clear cut and widely accepted methodologies exist, especially for potential effects on environmental life.

IMPROVING INFORMATION IN THE SUPPLY CHAIN: THE CSR/ES ROADMAP

In July 2013 ECHA published the "Chemical Safety Report/Exposure Scenario Roadmap", an ambitious cross-stakeholder action plan to improve the quality of information for safe use of substances in the CSR and in the ES communicated down the supply chain.

The CSR/ES Roadmap comprises over 20 discrete activities, grouped under the following 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

As part of DUCC, the Downstream Users of Chemicals Coordination group (a platform of formulating industry sectors), CEPE participates in many of these activities, with the goal to achieve clear, practical solutions which will benefit formulators (downstream users) but also their suppliers (substance registrants) and customers (end users). Just a few examples of Roadmap activities in which CEPE is/has been involved:

» Action area 2 - Specific Consumer Exposure Determinants (SCEDs): in 2014 DUCC has published a standard factsheet template and guidance on the use of SCEDs, which will enable more realistic exposure assessment for consumer uses. CEPE is developing SCEDs for relevant painting scenarios, and will gather data on consumer practices to

support this (see Decorative Coatings article).

» Action area 3 - Development and testing of a table of contents for ES annexes in extended safety data sheets, standardised rules for ES short titles and standard phrases to enable electronic transmission of ES.

» Action area 4 - DU CSA: following a survey carried out in Q1 2014 to understand the needs and challenges, an action plan is being pursued to provide tools, options and support for downstream users who need to make their own Chemical Safety Assessments.

Also under action area 4, CEPE has a project task force working on safe use information for mixtures. The goal is to find a practical solution to the obligation to pass on relevant information from substance ES down the supply chain, which makes it easier for the formulator whilst also providing clear, simple information on safe use to the end user of the paint or printing ink – not a long, unwieldy annex to the safety data sheet containing all the substance ES. This so-called "bottom-up" approach is based on a set of standard use categories for industrial and professional users, with boundaries for applying them; the related output documents and guidance for members are in development. Similar approaches are being implemented in several DUCC industry sectors, and the principles will be aligned and standardised as much as possible to foster acceptance by authorities and end users.

NOT ONLY PAINTS AND INKS

CEPE members are important users of resins, but several also manufacture resins themselves. As such they can be affected by some specific issues under REACH, such as the Commission's review under Article 138(2) regarding the possible need for registration of polymers. For this reason CEPE is a member of the Resins Technical Platform, a cross-sector group with Cefic and others, and participates in its three specific task forces on Polymer Classification, Extended Safety Data Sheets and Intermediates/Strictly Controlled Conditions. The first of these is working on an approach to demonstrate that polymers, including reactive resins, are adequately managed under existing regulation and that registration is unnecessary.



HAZARD COMMUNICATION

Product hazard communication is an issue affecting every CEPE member, and one which has been actively addressed by a dedicated working group for many years. This is a period of major change, and the complexity is increasing so guidance and support from CEPE remain just as important as ever.

CLP – ONLY A FEW MONTHS TO GO!

From 1 June 2015 it will be mandatory to classify and label mixtures according to Regulation (EC) No. 1272/2008 on classification, labelling and packaging of substances and mixtures ('CLP'), which implements the Globally Harmonised System (GHS) in Europe. Products already placed on the market before that date with old EU labels can remain in the supply chain until May 2017, but where products have long shelf-life members need to switch their labelling over in good time to avoid the need to re-label or recall them. See the diagram for more detail of the remaining CLP timelines, including its adaptations to technical progress (ATPs) which align the criteria with the latest version of GHS or update the harmonised substance classifications in Annex VI.

CEPE's Technical Committee Labelling and Safety Data Sheets (TC-LSDS) has been developing a CLP Labelling Guideline for members, to supplement the official guidance already available from the European Chemicals Agency (ECHA). This will be linked to other CEPE guidance on labelling of biocidal products and treated articles. In November 2013, in response to one of the main difficulties faced by members, TC-LSDS provided a selection tool for precautionary statements, originally developed by BCF, to help members prioritise and reduce the number of P-statements on their product labels.

Some issues common to all formulating sectors are tackled jointly on the level of DUCC, the Downstream Users of Chemicals Coordination group. A DUCC guidance note on CLP Article 33 (interface between supply and transport labelling) was published in May 2014, modelled closely on an existing CEPE position document, which seeks to clarify when a CLP supply label should not be required on outer (transport) packaging. This guidance is now being used in dialogue with the European Commission and Member States to seek resolution of a long-standing uncertainty. Advocacy activities are also underway on multi-lingual (fold-out) labels, where it is important to secure acceptance of solutions which are workable and cost-effective for industry whilst still ensuring clear hazard communication to recipients.

FUTURE CLP: UN GHS

CLP implements the United Nations GHS and is updated every two years as the latter is revised and improved. Industry has to be active in the relevant UN body to influence the content of GHS, and as part of IPPIC CEPE participates in the UN Sub-Committee of Experts on the GHS and in most of its subsidiary working groups. The 2013-2014 biennium is approaching its end, and changes coming in the 6th revised edition of GHS in 2015 (and CLP two years later) include a new hazard class for desensitized explosives - vital to avoid industrial nitrocellulose becoming 'explosive', with the related operational implications - and improved guidance for compiling section 9 of the safety data sheet. Working groups are in progress on nanomaterials, a global substance classification list, rationalization of P-statements and many more.

A key goal at UN level is also to improve harmonization between GHS and the rules on transport of dangerous goods, and CEPE/IPPIC participates in both Sub-Committees to seek the best results for members.

SAFETY DATA SHEETS

Safety data sheets (SDS) remain an important hazard communication tool for industrial and professional users. The 16-section format and basic content are specified by GHS, but in the EU SDS requirements are implemented in REACH and include additional content related to exposure scenarios (see REACH article).

CEPE (TC-LSDS) continues to maintain and update its Guideline on Safety Data Sheets, with Revision 2 of the 9th edition in February 2014, and at the time of writing the 10th edition (which assumes products are labelled according to CLP) is in preparation. The 9th edition (for DPD-labelled products) will still be available, but not maintained, alongside the 10th until 1 June 2015 when the 9th edition will cease to be valid. Update 9.4 of the CEPE Phrase Catalogue was published in November 2013, including additional translations and new standard phrases to explain missing content; Update 10.0 was nearing completion at the time of going to press. CEPE also works together with other industry groups, such as DUCC and Cefic, to develop common positions and guidance, and to lobby EU bodies and Member States for greater acceptance of internet-based electronic methods of SDS distribution, including the sending of links in place of large attachments.

CLP ARTICLE 45: HARMONISING INFORMATION FOR POISON CENTRES

Article 45 of CLP concerns the communication of information on hazardous mixtures to appointed bodies ('Poison Centres'), principally to enable them to provide emergen-

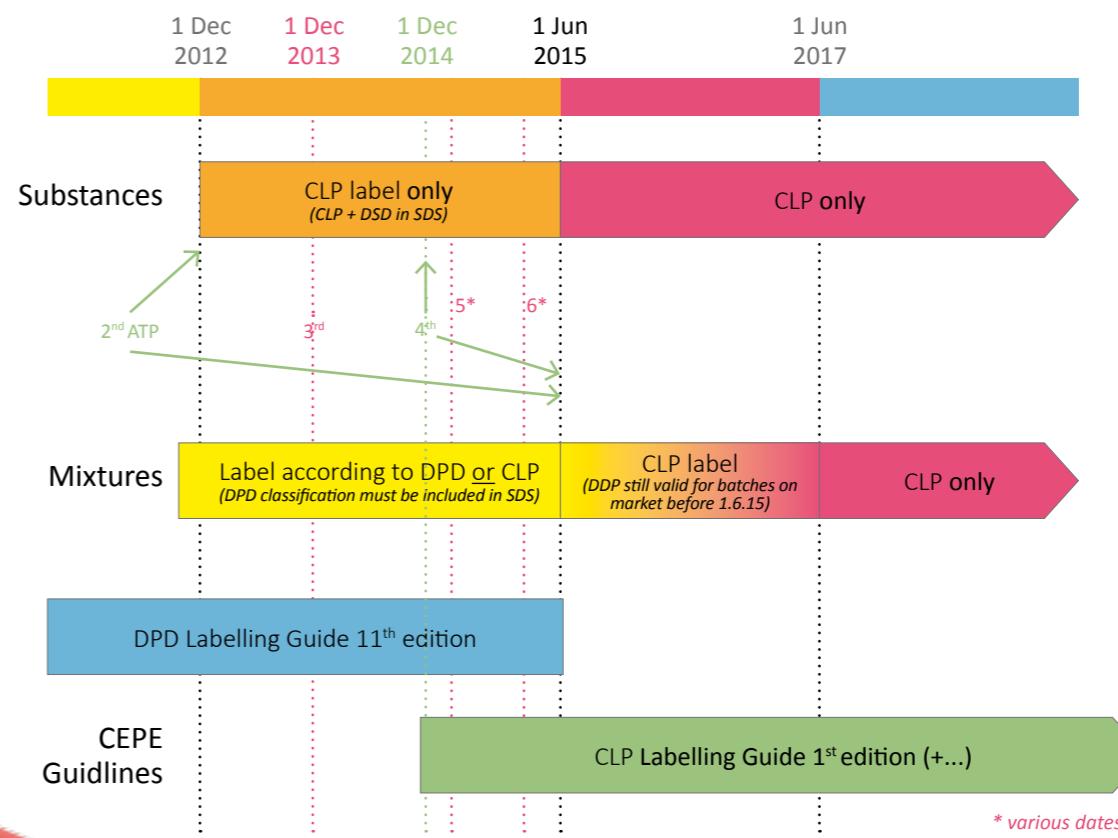
cy treatment advice in the event of a poisoning incident. Since 2010 the European Commission has been leading a process to try to harmonise this information throughout the EU. CEPE has been a very active member of the industry delegation from the beginning, participating in stakeholder meetings and preparing written comments, and discussions are now reaching an advanced stage with a preliminary draft for a regulation which will add a new annex to the CLP Regulation.

At the time of writing, the benefits to industry of a harmonised dataset and an electronic (XML) notification format look set to be outweighed by extensive and detailed reporting requirements. Furthermore no centralised notification is foreseen at present, so separate notifications will still be necessary in each Member State where a product is placed on the market.

Industry has consistently argued for an exemption or deferred implementation for mixtures used solely in industrial applications, on the basis of lower risk and other required workplace controls. So far however only a reduced submission has been proposed, conditional on rapid access being available to full composition details, along with an

exemption from notification for R&D samples. The Commission is conducting a study of the costs and benefits, and CEPE will ensure that relevant input is given by our sector. The Commission will prepare a further revised proposal in November 2014, and intends a new regulation to be adopted in 2015; the transition period will largely depend on the outcome of the study, but may be two years. CEPE will be there all the way to help members prepare for the new requirements.

CLP implementation deadlines and CEPE guideline validity



NANOTECHNOLOGY IN THE COATINGS AND INKS INDUSTRY

Sensible measures to allow sustainable nano-developments.

The CEPE nano working group follows closely the evolution of all European or national legislations on nanomaterials. CEPE also participates in the European Chemical Industry Council (Cefic) cross industry platform to get informed on sector specific legislative progress.

NANOMATERIALS TERMINOLOGY AND CHARACTERIZATION

On 18 November 2011, the European Commission published its recommendation on the definition of nanomaterials. Much awaited, this recommendation did not fulfil most stakeholders' expectations: it is too broad (even naturally occurring nanomaterials are in the scope) and uses particle size distribution as a defining criterion, for which no harmonized testing method exists yet, 3 years after publication. This definition is only in application when integrated in EU legislation where needed. Its review process has started, which could lead to a revision next year. This definition clearly implies that humans have always been exposed to nanoparticles from natural sources, such as forest fires, volcanoes, spray mist from the sea or wind erosion dust at the beach. In addition manmade processes, for example combustion or incineration, contribute to the emission of nanoparticles into the atmosphere. Furthermore, recent scientific research indicates that almost all solid matter may contain a certain fraction of nanoparticles. According to this definition all mixtures have a nanomaterial status, and pigments and fillers used for many centuries (carbon black, iron oxides etc.) are treated the same way as nanomaterials developed for their novel properties (scratch resistance, easy to clean or antibacterial). CEPE is keen on seeing this definition revised.

CEN and ISO committees are also working on the terminology aspects of nanomaterials. CEPE is participating in some subgroups of ISO TC 229 Nano and CEN TC 352 Nano through its French Association FIPEC, and would like to increase its involvement in the future.

2ND REGULATORY REVIEW ON NANOMATERIALS – REACH ANNEXES MODIFICATIONS

To ensure that nanomaterials are well covered by existing legislations, a regulatory review took

place in 2012. The review looked at the implementation of the definition; the place of nanomaterials on the market; hazards and risks of nanomaterials (nanomaterials in REACH registration and CLP notification dossiers); other relevant health, safety and environmental legislations (worker protection, consumer product safety legislation, etc.); and other areas such as standardization or research on nanomaterials.

The conclusions of this review were published in October 2012. They highlighted that the REACH regulation is considered as the best framework to manage nanomaterials, but that more specific requirements on how to address them within that framework were necessary. Work has since begun on adapting REACH annexes to nanomaterials, with various options proposed, ranging from no change at all to adding nano data requirements. The European Commission, European Parliament and Member States are taking longer than planned to agree on a proposal: the modifications which were supposed to be voted by the end of 2013 should be ready by the end of 2014 instead.

NANO INVENTORIES

The need for a European nano-inventory to ensure transparency of the manufacturing and use of nanomaterials was discussed in the 2nd regulatory review.

In December 2013, the European Commission has launched a web-platform gathering in one place links to existing information on nanomaterials, both regional and national. It contains pages on regulatory framework, national nanomaterials registries, research, policy etc. The platform is meant to be dynamic, but is currently still missing the most recent information.

On top of the platform, the European Commission has now launched an impact assessment to answer remarks on the lack of information on nanomaterials, especially for materials that could fall out of the REACH framework (i.e. below the 1tonne threshold). The assessment goal is to "identify and develop the most adequate way to increase transparency and ensure regulatory oversight for nano-

materials". To do so, it includes different policy options aimed at gathering more data, which will be discussed with individual stakeholders, as well as during a public consultation. As the process at the European level seems to take too much time, individual EU Member States have started their own projects for national nano registers.

2014 was the second year of declaration for the French system. Companies had until the 30th of April 2014 to declare nanomaterials used above 100g per year, and provide information on the nanomaterial, its uses and users. A report on statistics for the first year of declaration was also published last November. A total of 2776 declarations were made in 2013, 8% falling in the category of use "coatings and paints, solvents, diluents". As the French use a broad definition close to the one prepared by the European Commission, the overall volume declared reaches over 500.000 tonnes, including substances like carbon black, amorphous silica and calcium carbonate.

A new Belgian nano-inventory is being set up, with first registrations for substances before the 1st of January 2016, and for mixtures before the 1st of January 2017. The Belgian decree is very similar to the French one, using the same definition and the same 100g threshold for declaration. The main difference comes from the fact that the declaration is made prior to the placing on the market.

A Danish inventory has also been launched in 2014, with a declaration deadline for May 2015. Traditional paints should not need to be declared in the Danish registry as pigments are exempted, but CEPE and the Danish association DFL are currently cooperating in an investigation to strengthen this situation, by demonstrating that nanopartides cannot be released from a coating.

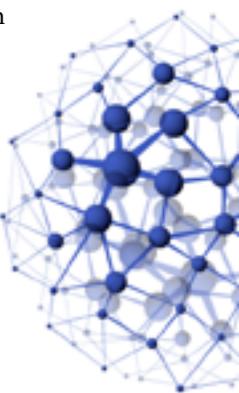
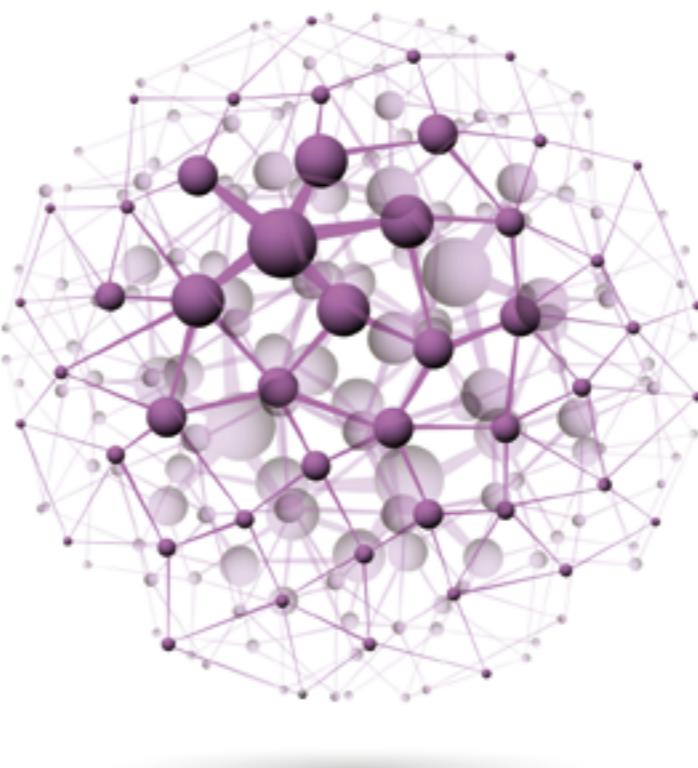
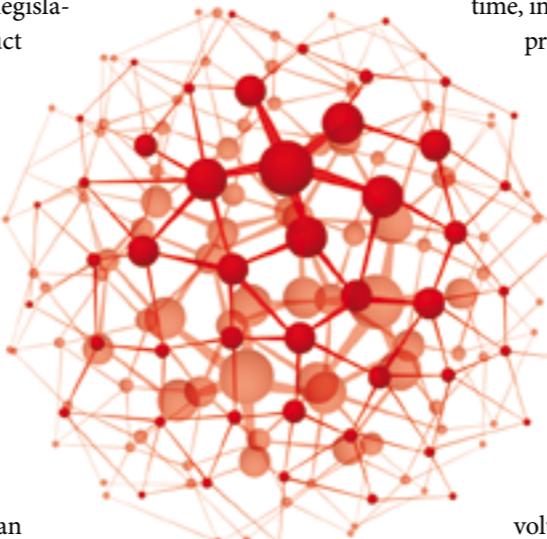
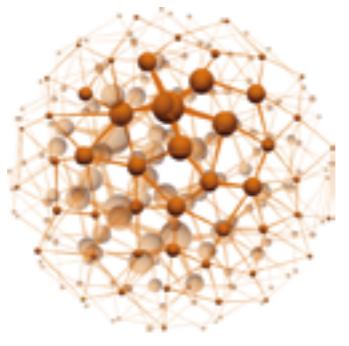
CEPE POSITION ON NANOMATERIALS

CEPE considers that a registry of nanomaterials would only be acceptable for nanomaterials for which health and safety data is insufficient. Additionally in our industry, nano-particles are bound in a matrix (either solid or liquid), so there should not be any obligation to register or label articles or mixtures containing these bound nanomaterials.

This position is being backed up by recent scientific studies. The German association VdL has investigated the fate of nanoparticles, demonstrating that nanoparticles do stay in their solid matrix, even under harsh conditions like sanding; but also do not escape during spray painting, and do not migrate from a printed layer. The Danish association DFL also participated in sanding studies resulting in similar results.

CEPE, together with some of our raw materials trade associations, is currently drafting a joint industry position paper to advocate a "smart" registry. A European registry covering unbound manufactured nanomaterials, which haven't yet been assessed for their health and safety aspects, is the only type of registry that we could support.

CEPE also does not support a general nano-labelling, which would fully undermine the existing philosophy of the European Union to point out dangerous substances and mixtures. Nanomaterials are not dangerous per se, and labelling all mixtures and articles containing nanomaterials would mean stigmatization – undoing the chances brought by nanotechnology, for example easing burdens on the environment. It is also worth noting that a general labelling obligation would not benefit consumers in any way, because all paints or printing inks and each coated or printed article are covered by the broad definition.



BIOCIDES

Since the previous annual report, the new Biocide Product Regulation (BPR) started to apply from 1 September 2013 on. Has anything changed significantly for CEPE members? Not really, except that the review of the existing active substances, which has been dragging during the last 10 years, has accelerated with the new ECHA's coordination role for the examination of active substance dossiers. It has become obvious that they will not allow any long discussions anymore and will complete their assessment within the time allowed. The ECHA's staff provides a well-structured working environment but it remains to be seen if the Member States will be able to follow the speed.

And unexpectedly some key active substances are already on the table this year.

CEPE MEMBERS AS BIOCIDE USERS

The new horizontal Biocide User Task Force held its first meetings during the past year. The topics discussed allowed the participants to have a much clearer understanding of the important active subjects under this biocide legislation. Two biocide suppliers were invited during the last meeting in June where they could provide a good update on some actives. In January 2014 with the release of the ECHA's programme for the year it became obvious that things were accelerating for in-can preservatives. Indeed, although this group of substances had got a new deadline by 2019 and beyond for its finalization, the active substance dossiers that were already well advanced by the Rapporteur Member States were sent to ECHA for discussion, and ECHA only has 270 days to make an opinion. And key substances belonging to the two main families are on the table: the formaldehyde releasers (with the threat of re-classification as carcinogen 1b like formaldehyde) and the isothiazolinones (CMIT/MIT, BIT, MIT etc.). The latter family is essential to in-can preservation. Most (if not all) CEPE members use them. But they are potent skin sensitizers and therefore of concern to the Authorities, especially due to the increasing number of cases linked to MIT. Hence it became obvious that it was important that downstream users like us raise their concern on potential adverse regulatory measures that could be taken under the biocide legislation. CEPE led an industry action with three other associations by first alerting the authorities of the essential nature of the two families and

the potential impact on downstream users, and secondly by preparing a more detailed impact assessment for submission later this year. Indeed, the Authorities are often not informed of the consequences of the measures they take and according to the biocide legislation they do not have to make any impact assessment. Hence it is our obligation to fulfil that role if we want to keep sufficient tools to operate our businesses in the future.

CEPE'S ANTI-FOULING MANUFACTURERS

For the CEPE members of the anti-fouling group, who are manufacturer of Biocidal products (the AF paint), several biocide actives have finally reached the last stage of approval this year and the bulk will be ended with the copper dossier, likely in 2015. The end of the review of the last active substance in a product triggers the need to submit dossiers for the AF paint and many uncertainties still remain. As stated in the Marine report the overly conservative risk assessment approach, if applied bluntly, will remove from the market most of the available efficient AF paint currently available. Despite all the efforts made at EU level (and we had to fight during end 2013 to avoid that a very limited time of approval for biocide active is applied for anti-fouling) we remain convinced that further advocacy is needed at national level, i.e. to those national ministries who will finally evaluate the AF product dossier. This will be done in coordination with the association of shipyards and marine equipment industry.

LABELLING OF TREATED ARTICLES

Following the CEPE Guidance on the labelling of treated articles according to Art 58(3) of the Biocide Product Regulation issued in May 2013, a new important element started to appear in October 2013 in the approval regulations of several biocide substances. A new standard sentence is since added for all skin sensitizing sentences, without distinction of their potency and without threshold:

„Where a treated article has been treated with or intentionally incorporates xxx, and where necessary due to the possibility of skin contact as well as the release of xxx under normal conditions of use, the person responsible for placing the treated article on the market shall ensure that the label provides information on the risk of skin sensitisation, as well

as the information referred to in the second subparagraph of Article 58(3) of Regulation (EU) No 528/2012.“

Our Guidance from May 2013 focused on the conditions triggering classification due to the Biocidal property, and underlined that labelling would also be required if the conditions of approval of active substances stated so. And this is what happened a few months later. However, this required clarification and we wrote to the EU Commission to ask if that would apply for mixtures without infringement of the CLP regulation and how this would apply to objects. In early 2014 COM supported our case that CLP only should apply to mixtures and tabled their proposal for amendment two times at the Biocide Competent Authority Meetings during the 1Q 2014 without success. Indeed, some Member States still have concerns that these 'dangerous biocides' should be treated more conservatively. It seems that this concern may be linked to the unsatisfactory situation that some biocide active substances are not yet officially classified (such as DCOIT and MIT). Such concern for a limited number of cases should not affect the general principle but COM has not yet been able to solve the issue. Concerning treated 'solid' objects, such as a wooden furniture on which, for instance a waterborne varnish has been applied, or a shirt where residues of biocides could be present from production, COM intends to keep the provision and let the operators decide if and when such article has to be labelled. Again it is unfortunate that such provisions are applied due to limited incidents (the dimethylfumarate case in sofas from China remains in their mind). CEPE is following this closely and will update the guidance at the right point in time.

BIOCIDE IN EFFLUENTS

CEPE made a recommendation for its members to not release in the environment any biocide substance from manufacturing activities. This includes the release of cleaning waters to sewage treatment plants, as many biocide substances will not degrade entirely in these and will therefore be released to surface waters. The presence of biocides into surface waters (and groundwater) is a danger for their future availability due to the link between the Biocide Product Regulation and the Water Framework Directive. The recommendation is available on CEPE's extranet for members.



INDOOR AIR QUALITY

CEPE's Indoor Air Quality Task Force is monitoring the developments on this issue both at EU and national levels. CEPE liaises with the European Chemical Industry Council (Cefic) and other industry sectors in the construction supply chain in order to agree on common industry positions, where possible.

EUROPEAN LANDSCAPE

Indoor air quality is mostly addressed nationally. Schemes have existed for a few years already in France, Germany and Nordic countries, and Belgium is now joining the group with their recently signed Royal decree, to enter into force in January 2015 for new products. The new Belgian scheme only focuses on floor coverings for now, but the authorities are performing an impact assessment to extend the scope to include other construction products presenting large surface areas, such as wall and ceiling coverings. The multiple national schemes are an answer to the lack of a harmonized regulation at European level. The European Commission and Parliament agreed on the 7th European Environmental Action Programme published in November 2013, which states that an improved indoor air quality should be achieved by 2020. Nevertheless, a European scheme on Indoor Air quality is not foreseen, and harmonisation activities such as the work done by the Joint Research Centre of the European Commission on 'Lowest Concentration of Interest' (LCI) values are being stopped due to a lack of mandate and budget to go on. LCI is "the lowest concentration above which, according to best professional judgement, the pollutant may have some effect on people in the indoor environment".

STANDARDISATION ACTIVITIES AT CEN

CEN, the European standardisation committee, has formed a Working Group dealing with emissions into indoor air (CEN/TC 351/WG2). For that reason, paints that are used indoors will also need proper test methods for evaluating emissions to the indoor air. CEN/TC139/WG11 was formed to prepare a vertical standard with the aim to define details for the preparation of the paint samples and for the measurement of the emissions from these paints. The standard CEN 16402 "Paints and varnishes — Assessment of emissions of substances from coatings into indoor air — Sampling, conditioning and testing" has been published



in November 2013. It will be updated when the horizontal standard drafted by CEN TC 351 is published.

CORRELATION BETWEEN FORMULATION AND INDOOR EMISSIONS; A CEPE RESEARCH PROJECT

Following the successful first part of the CEPE research project on frame formulations of decorative indoor paints, CEPE started to work on expanding the database of indoor air emissions from paints by assessing the availability of emission data from its membership. The aim is to dispose of a sufficiently large database to be able to define more precisely and with more reliability the frame formulations and to be able to discuss this issue with regulatory authorities, when needed. A brochure summarizing the conclusions of this work will be made available to the CEPE community before the end of the year.

BEYOND EUROPE

Interest in Indoor Air Quality is now also rising in the United States of America. CEPE is in contact with the American Coatings Association on this matter.

EDUCATION

ITECH STARTS INTERNATIONAL MASTER PAINT AND INK TECHNOLOGY

This article was previously published in "Verf & Inkt", the magazine of the Dutch Paint & Ink Association VVVE.

NEW TRAINING LOOKING FOR STUDENTS AND SPONSORS

Because of globalization and restructuring during the crisis years, the European paint and printing ink industry lost thousands of jobs. On the other hand, the threat is that there will be a shortage of academically trained paint and printing ink graduates. The companies' research capacity is decreasing due to retirement and in the same time, the few training institutes provide unsufficient graduates. Some even had to close due to a lack of registrations. Without a change in the policy, CEPE evaluated that the sector will have to cope with a shortage of about one hundred R & D staff every year. The industry fears that this will have negative effects on innovation on the long run. In 2013 CEPE created a Task Force in order to find solutions. Universities in France, Germany and England were approached and asked if they would be willing and able to set up an international, English-speaking university paint and printing ink master.

SCHOLARSHIP

The ITECH Institute in Lyon was one of the high schools approached. ITECH offers a tailor-made university master degree in paint and ink technology. The Institute responded positively as it was able to offer the required English-speaking curriculum in a short period of time. From September 2014 on, ITECH will propose an international Master's programme in English. After three years, graduates from this programme can start working in the paint and printing ink industry. The CEPE Task Force started a selection process for candidates who could be eligible for a scholarship. This process is aimed at students who completed a two- or three-year Bachelor in chemistry in a European university and want to go for a master in paint and ink technology. The scholarships are funded by the European paint and printing ink industry.

IMAGE PROBLEM

Jan van der Meulen is enthusiastic about the solution. „There is already a shortage of graduates in industry. The aging in the next five to ten years will even

increase the problem“ he explains. „Experienced people are retiring and the next generation does not suffice to fill the gaps. You can then choose to hire people with general chemistry education and give them a training in paint technology, but they won't be productive before several years.“ The shortage of academically qualified paint and printing ink engineers has also an impact outside the paint and printing ink sector, emphasizes Jan van der Meulen.

„Our sector is not the only one in need of coating engineers. The raw material suppliers as well as important customers such as the automotive industry hire such skilled staff. There are three parties involved. „

The paint and printing ink industry is suffering from an image problem. This is how he explains the lack of interest. „We are too small to be visible for graduates“ he thinks. „Young people study chemistry and at the end of their studies they just ask themselves what they are going to do with all this knowledge. When time has come to make a choice, the paint and printing ink industry is not visible enough as a potential chemical career. Paint is too much considered as a pot with substances which gives a nice color when applied to any substrate, nothing more than that. In the perception of students in chemistry, this is not the most exciting part of chemistry.“

JOB SECURITY

„This is a misconception,“ he judges. „There is much more than just architectural paints - and even architectural paints are not as straightforward as we might think. The product is subject to constant innovative developments. Only to mention the ambition to find alternatives to hazardous substances and to gradually go for more biobased materials. Paint is par excellence a product that ideally fits in the current sustainability trend. The product itself becomes more sustainable and application on materials increases their lifetime. This reduces the need for raw materials.“ →



„In addition – which is not negligible in current times - the graduate has the guarantee to get a job within six months. Nowadays there are not so many academic orientations where this is the case.“

With this sponsoring campaign, CEPE is trying to boost the number of students but this is a one-shot action, emphasizes Jan van der Meulen. „We will have to do more to raise our visibility and remain visible. Therefore, we will ask universities to direct students in chemistry towards specialized paint masters. And our national Associations will need to continue advertising.“

BROAD EDUCATION

Jerome Marcilloux, Director General of ITECH, was immediately enthusiastic to include an international master in their programme.

„The paint industry is a globalizing sector. An English-speaking programme opens more doors to employment, even for the French students who are currently limited to their domestic industry.“

ITECH is a relatively small institution with a long history. It was brought to life in 1988 from a merger of two older institutes: ESITL founded in 1840 (textile industry) and EFT founded in 1899 (leather processing, plastics, paints, printing inks, adhesives and sealants).

All training courses originate from the various industries for which they educate students. Every year, some 450 young people study in this high school from which more than three thousand have graduated today. All have international experience and made a long internship in a company during their curriculum.

„That is an important part of the training,“ explains Marcilloux. „We want that our students see the outside world and know how the life in a company looks like.“

The programme is divided in three elements: a general chemistry and mathematics part, a part covering subjects dealing with paint and printing inks and a part covering entrepreneurial management. „We want our students to understand what is going on in a company,“ explains Marcilloux, „and we train them in such a broad way that they eventually can start their own business.“

Marcilloux understands the problem pointed out by Jan van der Meulen. „The paint and printing ink industry struggles to attract young people. Those who study chemistry opt rather for cosmetics or pharmacy.

SPONSORSHIP

In an official ceremony on 30 September 2014 in Lyon, all sponsors will hand over the prize to the students who have been selected for scholarship.

TRANSPORT

The paint, printing ink and artists' colours industry in Europe depends upon, and is firmly committed to, the safe, timely and cost-effective transportation of its products. Approximately half of all products in our sector are classified as dangerous goods for transport, and as such are subject to relevant international and regional regulations. The UN Recommendations on the Transport of Dangerous Goods - Model Regulations ("Orange Book") and their supporting Manual of Tests and Criteria form the basis for rules in the different modes of transport:



» for sea transport, the International Maritime Dangerous Goods (IMDG) Code, made under a Convention of the International Maritime Organisation (IMO) in London;

» the Technical Instructions for the Safe Transport of Dangerous Goods by Air, issued by ICAO (International Civil Aviation Organisation – Montreal);

» for international land transport in Europe, agreements of UNECE (UN Economic Commission for Europe – Geneva), covering road (ADR), rail (RID) and inland waterways (ADN). These are implemented in EU legislation by Directive 2008/68/EC (as amended) for transport of dangerous goods within and between Member States.

Under the umbrella of IPPIC (International Paint & Printing Ink Council), CEPE participates in relevant international transport bodies to seek rules that are practicable and proportionate, in order to minimise costs, bureaucracy and delays for members whilst also ensuring safety. In this context CEPE's Technical Committee (TC) Transport works in close co-operation with the American Coatings Association, other IPPIC members worldwide and also other industry delegations as appropriate, such as Cefic, the European Chemical Industry Council.

FLAMMABLE LIQUIDS – STILL A BIG ISSUE

Traditionally the principal transport hazard for paints and printing inks is flammable liquids of Class 3, due to the presence of organic solvents. The criteria for safe and proportionate transport of flammable liquids have evolved over the years, but further refinements can still be made.

Certain viscous flammable liquids can be exempted from (most of) the regulations on transport of dangerous goods (see environmental hazards below). Others can be assigned to the least severe packing group for transport if certain criteria are met. In 2013-2014 CEPE successfully convinced the UNECE Joint Meeting to retain kinematic viscosity criteria, in addition to ISO flow cup, for this assignment in RID/ADR/ADN, albeit with a maximum limit of 450 litres.



or less to be exempted from all but the general packaging provisions, was included in the 18th revised edition of the Model Regulations published in 2013, and has been adopted into RID/ADR/ADN and the IMDG Code effective from 1 January 2015. In 2014 IPPIC has proposed allowing this exemption to be combined with the one in 2.3.2.5 for viscous flammable liquids, to take more low-risk goods out of the scope of regulation; a decision will be taken in December 2014 on IPPIC's formal proposal.

Together with Cefic, in 2013 IPPIC successfully argued against a new special provision in IMDG Code on technical names for marine pollutants and instead secured an improvement to the text of the Code to make the requirements clearer for users. This issue remains on the table in 2014, and IPPIC and Cefic continue their collaboration in order to preserve workable regulations.

IPPIC's proposal for a new harmonized description of "AQUATIC POLLUTANT" for all modes was taken on board by the IMO Editorial & Technical (E&T) Group and remains under consideration.

IPPIC also participates in a UN working group considering a longer-term revision of hazard communication in Class 9, which could lead to a useful streamlining of the labels and marks required on these dangerous goods.



This enhances safety by enabling the behaviour of thixotropic products, such as non-drip paints and screen inks, to be properly characterized. In July 2014 the UN Sub-Committee of Experts adopted IPPIC's proposal to include these criteria in the 19th revised edition of the Model Regulations, meaning that in future they should be available for use in all modes of transport.

ENVIRONMENTAL HAZARDS

With the shift towards water-based and other non-flammable paints and inks, which require the use of biocides, there is a steady increase in the number of products which are classified as hazardous to the environment (either solely, as UN 3082 or UN 3077 in Class 9, or in conjunction with other hazard classes). A large part of IPPIC's recent TDG activity has been focused on improving and harmonizing regulation in this area, and in November 2013 CEPE published an updated guidance for members on transport of environmentally hazardous products.

Special Provision 375, which allows environmentally hazardous materials in single or inner packagings of 5 litres/5 kg

IN SEARCH OF COMMON-SENSE SOLUTIONS

Again working together with Cefic, IPPIC continues to pursue a 'common-sense' interpretation for reduced label/mark sizes on smaller packages, taking into account package configuration as well as physical size and also other regulatory labels present. If the formal proposal is accepted in December 2014, this could in future save complexity, cost and enforcement difficulties for members without compromising the all-important hazard communication. Last, but by no means least, CEPE's TC Transport played a major role in developing CEPE and now DUCC guidance on CLP Article 33, regarding transport of substances or mixtures which are hazardous for supply but not dangerous goods for transport: see Hazard Communication article elsewhere in this report.

IPPIC



Global dealings for industry issues with a global character.

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 2014 annual meeting was hosted by the Chinese Paint Association in Xiamen. 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 Xiamen a set of IPPIC guidelines for Sustainability were agreed by the IPPIC members. These guidelines will ensure that when an IPPIC member association embarks on a sustain-

nability programme that the principles and content is harmonized with associations who are already working on it today. Paint companies who have settlements in many parts of the world may expect similar approaches to Life Cycle calculations and communications.

Working with care programme such as Coatings Care or Responsible Care are considered as a contributing step towards sustainability.

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 THE 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 awa-

reness 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 Working Group met in July 2014 in Singapore. 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 it was decided to hold the next in Europe in April 2015. See in the section on Marine Coatings. The forum tries to bring together the representatives of the stakeholders, legislators, ship-owners etc.

It is recognized that Europe has a comparatively small industry for ship building. There is however a 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. Important industry related bodies such as IMO and ISO are based in Europe as well.

TRANSPORT OF DANGEROUS GOODS (TDG) AND THE GLOBALLY HARMONIZED SYSTEM (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 national/regional legislation (for Europe within 2-4 years). It is therefore important for industry to be active at the UN level, to prevent unwelcome impacts down the line and to effect positive changes for our sector.

IPPIC participates as an NGO (official observer) in UN SCETDG and SCEGHS, as well as relevant modal bodies such as the IMO Sub-Committee on Carriage of Cargoes and Containers. The 2013-2014 biennium is approaching its end, and IPPIC continues to be active in a number of subject areas and correspondence groups (see separate articles in this report). Efforts to increase harmonisation around the globe and between TDG and GHS are supported by consultation of the growing family of IPPIC experts around the world.

EuPIA ANNUAL REPORT 2014



A sector of CEPE aisbl

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-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.

EuPIA CELEBRATED ITS 10TH ANNIVERSARY

On 6th November 2003 the Board of CEPE decided to found a specific sector association solely for its printing ink members. 10 years on and EuPIA is well-recognized by all partner industries in both the graphic and the food packaging sectors. This was reason enough to celebrate the 10th anniversary with an exclusive reception on 12th December 2013 in a decent environment: the Cercle Royal Gaulois Artistique et Littéraire in Brussels. About 50 guests followed EuPIA's invitation and listened to the anniversary addresses of EuPIA's past-Chairman Thomas Hensel, Lisa Kretschmann of the European Envelope Manufacturers' Association and Hans van Schaik of the European Carton Makers Association.

The reception was held in the Cercle Royal Gaulois Artistique et Littéraire



MARKET STATISTICS 2013

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 34 countries or country groupings in Western and Eastern Europe and represent the activity of 28 EuPIA members participating in the statistics.

It is believed that this represents overall in excess of 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

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

Past-Chairman Thomas Hensel gives welcome address



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.

Food scares originating from food packaging had led to criticism by member states, industry and the European Parliament on the lack of EU specific legislation for materials other than plastic.

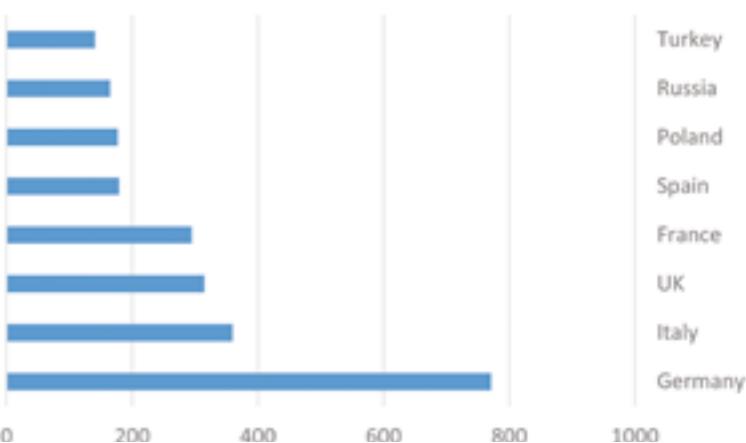
Therefore, in 2012, the European Commission had started an initiative to check the necessity and options to regulate non-plastic food contact materials, and summarized its views in a so-called "roadmap". Subsequently, the Commission consulted Member States and industry for their opinions. EuPIA and many 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. Up to the close of the reporting period, no information was available about the analysis of responses received during the consultation.

Union Guidelines on the Plastics Regulation published

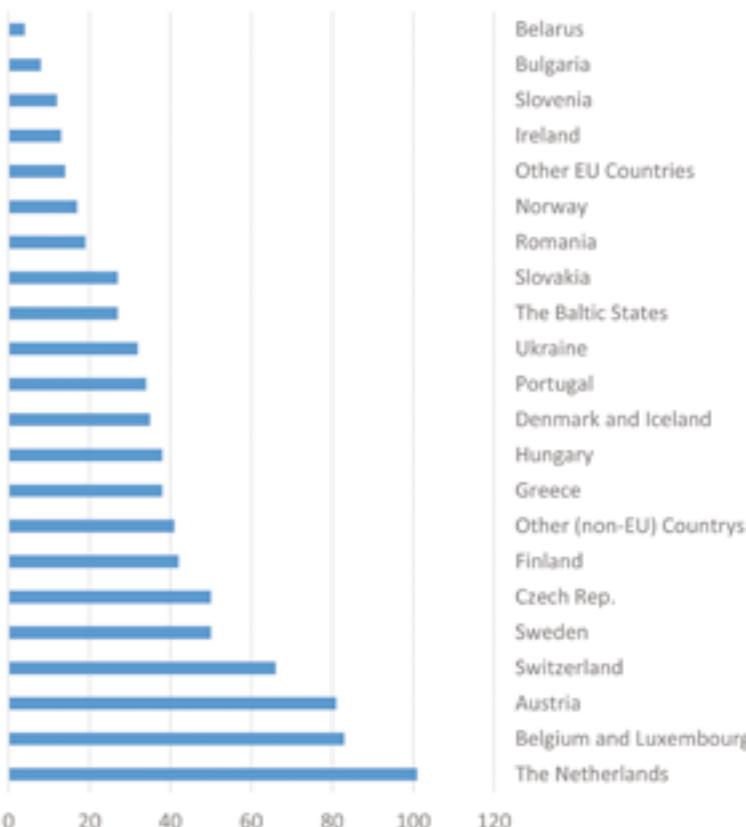
The EU Commission published two guidelines dealing with questions concerning the interpretation and implementation of the provisions included in the Plastics Regulation (EU) No 10/2011. Industry and Member States were consulted during the development of the documents, and EuPIA actively contributed.

The Union Guidelines on Regulation (EU) No 10/2011 on plastic materials and articles intended to come into contact with food clarify to what extent the print on a plastic material is covered by the scope of the plastics regulation (chapter 3.3.4): "Coated and printed plastic materials and articles are covered by the scope of the Plastics Regulation. Plastics held together by adhesives are also covered by its scope. However, substances used only in printing inks, adhesives and coatings are not included in the Union list because these layers are not subject to the compositional requirements of

Sales Value by country for 2013 in €m



Sales Value by country for 2013 in €m



the Plastics Regulation. The only exceptions are substances used in coatings which form gaskets in closures and in caps. The requirements for printing inks, adhesives and coatings are intended to be set out in separate specific Union measures. Until such measures are adopted, they are covered by national law. If a substance used in a coating, a printing ink or an adhesive is listed in the Union list, the final material or article has to comply with the migration limit of this substance, even if the substance is used in the coating, printing ink or adhesive only."

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 describes in detail which information should be collated and exchanged in the supply chain to ensure compliance with the requirements of the regulation. Food packaging inks are regarded as "non-plastic intermediate materials". Manufacturers of food packaging inks are not required to issue a "Declaration of Compliance", but should provide "adequate information" that will allow the manufacturer of the final plastic article to establish compliance with the Plastics Regulation for those substances for which relevant specifications or restrictions exist. Most of the required information is already contained in the EuPIA model "Statement of Composition" (SoC) as of today. Minor adjustments are necessary though, and will be made in due course.

German Ordinance on Materials and Articles: draft amendment specifying requirements for printing inks/ varnishes applied on food contact materials

Although the European Commission has started an initiative for EU harmonized regulatory approaches to non-plastic-food contact materials including printing inks, Germany apparently believes that the EU process is too slow and therefore exercises the option of adopting a "national specific measure" for printing inks applied on food contact materials. It is intended to implement this measure through

an amendment to the German Ordinance on Materials and Articles, the so-called "Printing Ink Ordinance". EuPIA and the entire food packaging chain are generally open to appropriate regulations enhancing product and process safety in the complex supply chains, as well as improvements of health related consumer protection, if justified by objective needs. For many reasons, EuPIA and the entire food packaging supply chain hold the firm view that a separate national approach in this field is not a suitable instrument to achieve the objectives, and therefore call on the German legislator to stop this national initiative and to support the EU Commission in developing suitable Community rules for inks and varnishes for food contact materials. Like its Swiss antetype (Swiss Ordinance on Materials and Article SR 817.023.21), the draft German Ordinance is based on the positive list principle. However, as the scope of the draft German Ordinance is much broader, the positive list cannot simply be copied from the Swiss piece of legislation. Therefore, and despite its fundamental criticism of the German approach, EuPIA has been compiling information enabling the establishment of substance lists for the German Ordinance.

A final draft for notification to the European Commission according to the TRIS procedure was announced for May 2014, but has not been received as of the close of the reporting period.

How do the regulatory initiatives affect the current EuPIA concepts in the field of printed food contact materials?

In 2007, EuPIA decided to collate and make publicly available a list of all the substances used in the manufacture of food packaging inks, with the aim of implementing a transparent tool for packaging converters and brand owners (EuPIA Inventory List comprising Packaging Ink Raw Materials Applied to the Non-Food Contact Surface of Food Packaging). From 2007 to 2013 the list served a useful function, intending to be a reference for competent autho-

rities and other stakeholders. Since 2010, the amendment on food packaging inks of the Swiss Consumer Goods Ordinance is in force which contains a positive list of substances which only may be used in the manufacture of food packaging inks marketed in Switzerland. Germany follows suit (see above). The consequence of having such listing in national legislation means the EuPIA Inventory List had become superseded by the evolution of legislation and was no longer relevant as an independent, updated document. As a result, it was decided at the end of 2013 that the EuPIA Inventory List should be closed as a document, but would be maintained for the purposes of historical reference only. The regulatory initiatives will also have an effect on the two other core guidance documents that EuPIA has produced to assist members to provide products fit for purpose: The EuPIA Guideline on Printing Inks Applied to the Non-Food Contact Surface of Food Packaging Materials and Articles, and the Good Manufacturing Practices for the Production of Packaging Inks formulated for use on the Non-Food

participated and provided data. FACET allows modelling of the probabilistic assessment of exposure to substances from retailed primary food packaging. It is a much better approach than assuming that a 60 kg adult eats 1 kg of food wrapped in 6 dm² of packaging. FACET includes information about what people eat (dietary surveys), what the food is packed in, the material in the packaging structure, and the concentration of substances in those materials. EuPIA provided the data for substances in inks. In the first half of 2014, EuPIA offered two training courses for member companies, focused on how to use FACET as part of risk assessments.

EuPIA TECHNICAL COMMITTEE

Technical issues and non-food applications of printing inks are managed by 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". In 2014 ETC has established a closer co-operation with Intergraf, the European federation of the printing and graphic industry, on technical issues of mutual interest such as emissions, recycling/de-inking and the EU Ecolabel for printed paper products.

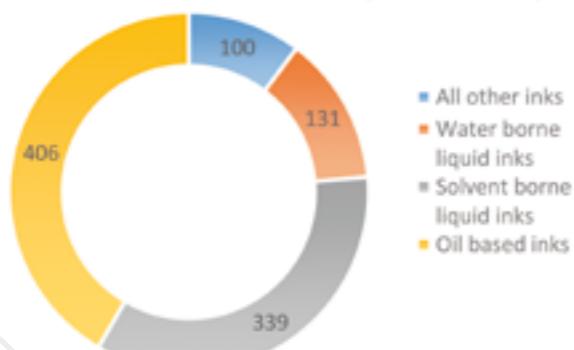
ETC continues to maintain the EuPIA Exclusion List for Printing Inks and Related Products, one of its most valued public commitments to safer operations and products through a voluntary 'prohibition' of the most hazardous raw materials.

As a result of the procedure established in 2013 (see figure), a new challenge arose due to the re-classification of an important substance, which could not be readily substituted in one segment

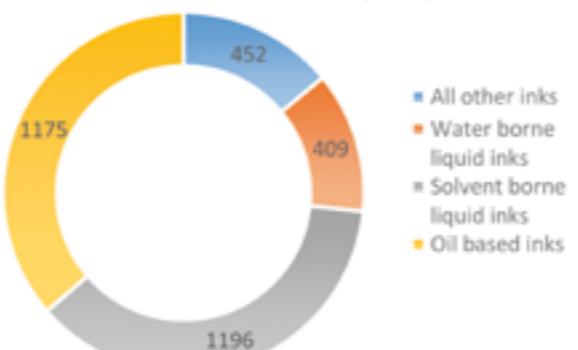
of the printing industry. ETC established a transparent, specific process to address this issue, and published a customer information note to explain and reassure regarding safe use of this substance.

EuPIA remains committed to the principle of the Exclusion List. More substance re-classifications can be expected in the coming years, as new data are generated under REACH, so in 2014 ETC is establishing a working group to consider the future development of the Exclusion List. →

Sales Volume for 2013 (000s tons)



Sales Volume for 2013 (€m)



EuPIA TC agreement: substitution period should not commence from inclusion of the substance in Annex VI of CLP Regulatio

surfaces of Food Packaging and Articles Intended to Come into Contact with food. Both these documents are currently under review by specialized working groups.

FACET

FACET is an exposure modelling software tool, the development of which was funded by a European Commission Framework project. Trade associations including EuPIA, CEPE, FEICA, FPE, Plastics Europe, CEPI and others have

Sector-specific activities and guidance

In the past year ETC has undertaken activities and produced guidance on a number of important non-food issues:

- » Toy safety: an updated EuPIA position statement on the suitability of inks and related products for toys, reflecting the latest status of the Directive and EN 71 harmonised standards, was published in October 2013. ETC is investigating the impact for inks of proposed new migration limits for lead, primarily affecting inorganic pigments.
- » Cosmetics packaging: ETC members have been participating in a cross-sector task force, which is developing a standardised approach for communication of information about packaging to cosmetic brand owners/safety assessors. The approaches and documents developed for food packaging have provided useful models for this work.
- » Biocides: a EuPIA-specific guidance document on 'treated articles' was published to assist members in understanding their obligations and advising customers. In conjunction with the Biocide Users' Task Force (see separate article), ETC is monitoring the preservatives used in printing inks and related materials in order to defend their use and ensure that suppliers take the necessary action concerning active substance approval.
- » Environment and sustainability: the information note "Environmental Impact of Printing Inks" is now available in four languages and is used to help answer questions from customers and printers' associations. Environmental Product Declarations are not currently required for printing inks, but a standardised 'virtual ink formulation' has been developed to produce a representative Ecofootprint report for printing inks using the CEPE tool (see Sustainability article), enabling members to give an easier and more robust answer to any queries in this area.

ETC also takes on the task of monitoring numerous specific 'substances of interest' used in printing inks, particularly when these are included in the Community Rolling Action Plan (CoRAP) for substance evaluation under REACH. This vigilance will enable information on downstream uses to be provided to registrants as required, as well as pro-active decision-making on potential ink impacts and substitution.

Members of the Task Force "Mineral Oils in Publication Inks" participated in the MOCRINIS workshop, organised by the mineral oil industry in September 2013, and its continuing working group to develop balanced and scientific arguments in reaction to political pressure. They have also tracked the draf-

ting of a new German ordinance on mineral oils and participated in hearings. EuPIA positions will be developed as required on this topic, although no specific regulation of printing inks is being proposed; mineral oil-free news inks - identified as one of the sources for mineral oils in recycled paper/board - are feasible in principle, but alone would not solve the problem since mineral oils in recycled paper/board and packaged foodstuffs can come from many different sources.

EuPIA supports initiatives to enhance the recycling of recovered paper and continues to be an active participant in the European Recovered Paper Council (ERPC). EuPIA is a Supporter of the "European Declaration on Paper Recycling 2011-2015", a voluntary cross-industry commitment to a sustainable increase in paper recycling. EuPIA has co-developed and supports a number of ERPC guidance documents, accessible via the ERPC website at www.paper-recovery.org, and where relevant participates in projects to address technical issues encountered in paper recycling.

Hazard communication

The EuPIA LSDS working group has made significant contributions to the continual improvement of CEPE's guidelines on labelling and safety data sheets. It also gives expert input to the CEPE project on safe use information for mixtures, providing important advice on typical Operating Conditions and Risk Management Measures for the use of printing inks in practice.

Operational health and safety

The EuPIA OSRA group supports members of EuPIA and CEPE, but also their customers and downstream users, in the goal of operating at a high level of plant and occupational safety. OSRA's expertise has been augmented by some new members over the past year, including a paint company new to the group.

As every year, OSRA continues to publish its popular Safety Flashes and Safety Alerts on a broad range of topics, highlighting significant incidents or risks and sharing key learning points for members with the aim to reduce the risk of a similar occurrence. In recent months OSRA has also been reviewing and updating its guidelines on safe handling of energy-curing materials, both for members and for customers, and is developing new or updated guidance on laboratory safety and handling of flammable liquids.

OSRA guidelines are made available on the Workplace for use by EuPIA/CEPE members. Those intended for customers are also available on the public area of www.eupia.org.

11TH EUPIA ANNUAL CONFERENCE

EuPIA's 11th Annual conference was held on the 27 - 28 March 2014 in Lisbon, Portugal. Thomas Hensel, Past President of EuPIA, the European Printing Ink Association, welcomed more than 80 participants with the 4 values that the association stands for: proactive, competent, trustworthy and reliable.

Thomas Hensel reflected on the past ten years and recalled why EuPIA was founded. A decade ago there was felt the need to elevate the image of the printing ink industry because its esteem with customers was low, the value the industry brought to society was not recognised and it was not deemed to be an appealing sector to attract new generations. On top of these observations the industry faced a phenomenal legislative challenge. Hensel then described the work that EuPIA has been doing in these last ten years and concluded that the association has done a great job in meeting the needs that were expressed at its creation, proudly serving over 80 members representing some 12,000 jobs throughout Europe.

MARKET IS STILL SUFFERING

From the presentation of Martin Kanert, EuPIA's Executive Manager, it is clear that the legislative challenge still exists and there is still a long way to go. Martin Cellerier, chairman of the Statistics Working Group gave the perfect introduction to the topic of day 1 : Doing business in a shrinking market. 28 companies participate in the EuPIA statistics, covering 90 % of the total European market. Overall the volume dropped by 3.2% and the value by 3.4% (in 2013) so clearly the market is still suffering from the economic problems in Europe. Cellerier explained that the share between inks for packaging and inks for publication continues to shift in favour of packaging, illustrated by the fact that in 2013 the market share of publishing decreased further to 61 % whereas in 2005 it was 69 %.

USE OF SPECIAL INKS WILL BECOME MORE IMPORTANT

The next 3 speakers, Dr. Thomas Weskamp - McKinsey, Dr. Klemens Berktold - Funke Druck GmbH and Thomas Drensek - Axel Springer AG shared their views and experiences on doing business in a shrinking market and why they still invest in publication. In a shrinking market it is necessary to behave rationally in core markets and find growth elsewhere. The key is to differentiate and in the ability to adapt.

The newspaper of the future will no longer be driven by technologies but by market demands, with a shift from "Publisher is King" to "Customer is King". The reader

is now central, so it will be important to use different products to create "other" types of newspaper. Certainly the media landscape of the future will not be print OR digital, but print AND digital. The use of special inks and processes will become more and more important and will offer many possibilities. Drensek proposed that the ink makers use publishers as laboratories to work together on new developments.

The first day closed with a panel discussion which concluded that although the market is shrinking there are enough challenges for those who make creative use of the opportunities laying in front of them; which seamlessly leads to the topic of day 2 : Innovation as driver for the future.

THE NEED TO BE CREATIVE

This session was introduced by Felipe Mellado, the newly nominated president of EuPIA.

The whole packaging concept is to be rethought due to the changing market conditions as Andrew Revel of Faraday explained. The consumers get older and have larger budgets to spend. Shopping is changing from large stores to more local small scale stores. And then there is the whole area of online shopping. How will this influence packaging? Another challenge for the industry is the growing demand for new bio-based materials which will have different characteristics and therefore have other migration properties that need to be investigated. These new materials need new inks, so "be creative", was the message.

INNOVATION IS THE DRIVER FOR THE FUTURE

Hervé Baratte - Baratte Consulting sets the Environment for Innovation. No one can afford to "stop innovating" because of a difficult market. Innovation is teamwork and a company's first researchers are its sales force. They are in contact with the market and pick up the first signals for new needs. Baratte quoted "Employees First, Customers second". If this is done the right way, it is possible to secure non-customers to make sure they become future clients.

The third speaker of the day, Dr. Martina Weidner of Altana described the endless possibilities of using printed electronics in packaging and Point of Sales displays. It is obvious that imagination and creativity drive innovation to an unknown extent. Mr. Mellado rounded-up a very successful 11th Annual Conference with the conclusion that even in a shrinking market, for both publishing and packaging, innovation is the driver for the future.

Next year's conference will take place in Marseille, France on the 23 - 24, April 2015.

(was published in ECJ 05 / 2014)

ARTISTS' COLOURS



Artists' Colours (AC) is a small but commercially significant sector of CEPE. Its products have to meet the same requirements as in other sectors, for example regarding hazard communication and transport, but with some special challenges due to their form, use or composition, such as very small package sizes or raw materials with special properties and/or historical significance.

In 2014 the AC sector group agreed to separate its business and technical meetings and to hold two technical meetings per year, in order to increase the effectiveness of the respective committees and to devote more attention to key technical issues. It also agreed to strengthen its expertise by inviting participation from manufacturers of aerosol paints.

THE BATTLE TO SAVE IMPORTANT INGREDIENTS

In January 2014 a dossier was submitted to the European Chemicals Agency (ECHA) proposing to restrict the use of cadmium pigments in artists' paints, to prevent their deposition on agricultural land via sewage sludge. If adopted this would mean an EU-wide ban on these unique colours, which are highly valued by professional and serious amateur artists and cannot be substituted directly by alternatives. CEPE has been working closely with the cadmium

pigments industry to submit technical and socioeconomic comments against the proposal, and members have made good use of publications and social media channels to inform artists and motivate them to give their input to the public consultation. The consultation continues until September 2014, but early indications are that industry's arguments are being taken on board.

Preservatives are very important in artists' colours due to the long shelf-life required, however these substances are coming under pressure under the Biocidal Products Regulation (see separate article). CEPE's guidance and advocacy towards suppliers is important also for AC members and some participate in the Biocide Users Task Force, although for practical reasons AC may not always follow the same position as other sectors such as decorative paints.

SAFE PLAY AND STIMULATING ARTISTIC DEVELOPMENT

Some AC products are aimed at children and therefore classified as toys. The chemical requirements of the Toy Safety Directive have been in effect since July 2013, although some of the EN 71 harmonized standards supporting these are in need of improvement; CEPE is represented in the relevant standardization committees through participation of members in their national bodies. In recent months CEPE has provided feedback on a new proposal to reduce significantly the migration limits for lead (Pb) in the directive, which could impact on the ability to demonstrate compliance where mineral raw materials are used.

CEPE maintains important international relationships with ACMI (the Art & Creative Materials Institute, Inc.), which provides product testing and certification in North America, and NAMTA (the International Art Materials Association), which besides its business promotion activities also has an active art advocacy programme, promoting the benefits and importance of visual arts in education.

In 2014 the sector group agreed the text of its Environmental Responsibility Code to demonstrate the commitment of AC producers to relevant sustainability goals. This will be supported in due course by a self-assessment questionnaire to help members check and monitor their compliance.

CANCOATING

THE BPA SITUATION

In France

The authorities continue with their isolate way of banning Bisphenol A.

With the date of January 2015 coming ever closer not much time is left for industry to make business adjustments. Still many things have to be clarified e.g. the labelling; 'Declaration of compliance' and how checks will be made; how to deal with Not Intentionally Added BPA etc. It is also highly questionable how well the French borders will prevent imports. The whole situation may become ungovernable and may lead to considerable job losses in the chain for packaging manufacturing.



In Europe

Europe's Food and Safety Agency is requested to come with an opinion on the BPA matter. Given the number of comments received during the public consultation on their draft opinion, this has been stalled again, this time to the end of the year. However, in their draft opinion EFSA concluded as per their 2006 review that the use of BPA in can coating is safe, based on their scientific well established approach for risk assessment and taking into account the many new publications released in literature during the past few years.

FACET NEWS

The project named 'FACET' – Flavourings, Additives, Contact materials, Exposure Task – has delivered an exposure based risk management tool for the European Commission, EU Member States, the European Food Safety Authority (EFSA)

and Industry. It offers an integrated framework for the assessment of consumer exposure to flavourings, additives and packaging substances. Its first public version continues to gain credibility and evermore practitioners are being trained on the tool. A next public version will be released at the PIRA conference in December.

CODE OF PRACTICE ACCEPTANCE

In the absence of any dedicated legislation for food contact materials other than plastic (e.g. metal packaging) the can coating group had developed in cooperation with other Associations down the supply chain the "Industry Code of Practice for coated Articles where the Food Contact Layer is a Coating". First issued in 2006.

Two Member States (NL and BE) are now initiating national legislation on the packaging. It is good to see that these legislative proposals contain many of the principles that were the base of the CoP.

POWDER COATINGS

Many of the applications of Powder Coatings end up in the building industry. They will therewith sooner or later also have to be assessed for their impacts in the green building schemes. Some databases (like in NL) contain old and non-validated data on powder which can make technologies with validated data the preferred choice for the prescribing architect.

CEPE's powder coating group has been discussing a project on a life cycle analysis of aluminum window frames for outdoor use. Various options were considered for the scope of the study and data on powder application and lifetime of window frames was not easy to find. Two powder formulations with varying durability will be evaluated. The group should now be ready to have the LCA executed.



DECORATIVE COATINGS

"NO" TO CE MARKING FOR DECORATIVE COATINGS

In its meeting of 13 February 2014, a majority of the EU Member State delegates of the Standing Committee on Construction opposed to giving a mandate for standards for decorative paints and varnishes. Recognizing that decorative coatings are not to be considered as construction products means that there will be no CE marking of decorative coatings. This reflects the CEPE position which was communicated prior to the meeting to nearly all the delegates in this meeting by a "blitz" campaign of the National Associations.

SUSTAINABILITY

Sustainability claims, Ecolabel

The new criteria for the European Ecolabel for paints and varnishes have been officially published on the 28th of May, after over two and a half years of active discussions. Despite the involvement of CEPE from the first day of the revision onwards, the published criteria are not entirely satisfactory, sometimes including non-sensible criteria, for example a declaration of nanomaterials.

The Ecolabels awarded according to the previous set of criteria can still be used until the 28 May 2015.

Product Environmental Footprinting project – next step for deco sustainability work

The decorative coatings sustainability sub-committee has been suspended in favour of the Product Environmental Footprint Technical Secretariat (PEF TS). The PEF TS will address most of the issues that the sub-committee had to cover: calculations of environmental footprint for the whole life cycle of deco paints, from extraction of raw materials to end of life, including transportation and use; as well as communication to various audiences:

of deco paints, from extraction of raw materials to end of life, including transportation and use; as well as communication to various audiences:

MEKO

Making up only a small percentage of a paint formula Methyl Ethyl Ket-Oxime which is used as anti-skinning agent in air-drying alkyd based paints. It is known to have a reversible effect on the nasal epithelium. The German authorities have adopted a lower Occupational Exposure Limit (OEL) for MEKO which would for applications where no personal protection equipment lead to a non-safe use.

The German Paint and Ink association VdL works with the German authorities on establishing real-life data of exposure before the new limits would be enforced. Results are expected by year end 2014. Thereafter the impact on the European OEL will be addressed.

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.

business to business and business to consumer. For more information about the PEF pilot project, see the sustainability section of the annual report.

The subcommittee will be reactivated when new work items make it necessary.

Bio-based materials

Since 2012, CEPE is monitoring closely bio-based activities. 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.). CEPE has members in three of the CEN TC 411 (bio-based materials) working groups on bio-solvents, bio-content and claims of bio-based materials.

CONSUMER USE OF DECORATIVE PAINTS

In assessing exposure risks (human exposure and exposure to the environment) our industry is often requested to come with data on the typical use of a paint (how much of the paint and how often). In the absence of recent data, the paint industry often faces 'old' default values that are overly conservative and could easily lead to restrictions in the use of critical substances in paints. This would then drive companies to costly reformulate, where possible.

Without any recent data the industry lacks the base for good argumentation with authorities and therewith for sensible solutions. To tackle this situation the deco group has proposed to do a consumer survey that would give clarity on the frequency and the use of paints. This has been accepted by the CEPE Board and will be financed from CEPE's Special Issue Fund.

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

However a recent 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.

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

LEACHING OF DANGEROUS SUBSTANCES

Significant progress was made on the leaching project, starting with the identification of representative coatings for Europe. The experts from different member companies were able to agree on the identification of 14 external decorative coatings: 6 for masonry facades, 5 for wood stains and 3 for wood paint. For each of them typical characteristics including application rates and generic detailed compositions were identified. Three companies volunteered to make the test samples in their laboratory. Earlier this year two test institutes initiated the laboratory leaching studies and results will be discussed after the summer holidays. In parallel, we have been in contact with a Spanish Institute who obtained EU grants to search this topic for biocides. We have been able to significantly influence their test design. At this time it is still uncertain whether they will be able to continue the project due mainly to their lack of expertise with the analytical part. Whatever happens we will have avoided that wrong information is generated. The future semi-field leaching studies will be in the hands of the biocide suppliers under CEPE coordination.

MIT, AN ESSENTIAL IN-CAN PRESERVATIVE UNDER PRESSURE

MIT is an isothiazolinone in-can preservative that has been increasingly used since the re-classification of the mixture CMIT/MIT with a skin sensitization threshold of 15 ppm. MIT is an essential tool for in-can preservation as not many alternatives exist anymore due to the stringent biocide legislation. MIT alone is not yet officially classified in Europe and has been extensively used for a decade in many different water based products, including cosmetics. Due to the so stated 'alarming' increase number of patients who turned to hospital for allergic problems due to MIT, the use in cosmetic has been under pressure and a significant use restriction was discussed. Unlike in cosmetic and in detergent where mandatory disclosure of ingredients is enforced, the presence of MIT in paint does not need to be disclosed under a certain threshold, which is still identified by the suppliers (typically 100 ppm). This

lack of communication is causing concern for some Authorities, and some media did like the subject as well. CEPE discussed in different internal groups on the possibility to communicate on the presence of MIT even below that threshold, as it was deemed strategically important to reduce the pressure on that substance in order to ensure its long term availability. The two main biocide suppliers for MIT were given the chance to give an update during the CEPE Biocide user TF meeting in June 2014 and they both recommended that paint companies do actively communicate. CEPE Technical and toxicological groups support this and another discussion will take place during the deco TC/SG meeting in the GA in Riga this year.

COATINGS AND WOODWORKING INDUSTRIES WIN MAJOR EU FUNDING FOR SUSTAINABLE RESEARCH PROJECT

A consortium of 15 partners from the coatings and joinery industries and research institutes have been successful in receiving EU funding of €2.7m towards SERVOWOOD, a FP7 project whose goal is to develop and establish European standards that will facilitate the prediction of service life for exterior wood coatings. The total budgeted cost of the project is €3.8m.

The consortium is made up of CEPE and trade associations and consultancies from Denmark, Germany, Spain and the UK representing both paint manufacturers and the wood supply chain, together with research institutes and two SME coatings and joinery manufacturers.

Commenting on the success, Jan van der Meulen, SERVOWOOD's project co-ordinator said "It is fantastic news that the coatings industry, together with its partners from the woodworking industry, have secured this funding towards a project that will help shine the light on the contribution made by coatings towards protecting scarce natural resources, such as wood used as a substrate in the construction industry. Given that only one in twenty bids are successful, this is a real achievement".

The project started on 1 January 2014 and will run for three years. During this period the project will expose a wide range of wood panels to natural weathering and a range of accelerated tests, some of which will be novel, to determine which tests best predict natural degradation. It is hoped that from these results an improved European Standard can be developed for the benefit of all those involved in timber construction. It should also help create more confidence for customers, who have so far been reluctant to use timber building elements, due to assumed high maintenance efforts.

For further information visit the SERVOWOOD website www.servowood.eu



MARINE COATINGS

Marine coatings are used on ships of different sizes and different categories and their specificities depend on where the coating is applied on the ship: anti-fouling paints used in direct contact with seawater must not only protect the structure but also have to prevent fouling organisms to stick to the hull of the ship, protective and decorative coatings are required on the rest of the ship including in ballast tanks. The CEPE Marine Coating Industry groups are discussing various issues related to the protection of workers, especially in dry-docks, the protection of the environment particularly in the anti-fouling group or the setting of standards for testing the quality of the marine coatings.

EFFECTIVE ANTI-FOULING PAINTS ARE ESSENTIAL TO THE EUROPEAN MARINE INDUSTRY

AF paints form an important part of a maintenance round for ships when they dry dock. When the effectiveness of the AF coat after a certain service period is reduced and the growing of all kind of marine species on the ship's hull results in increase in fuel consumption the time has come to find a dock. But if you can no longer apply an effective fresh coat of AF the EU docks will remain idle.

Ineffective AF paints may result when the paint manufacturers have too little biocides to choose from as active anti-fouling ingredient when national authorities would apply overcautious risk assessments.

Although the unavailability of effective AF paints may be the initiator for idle shipyards it would also kill the business of many other products or maintenance services that are applied during the dry dock period. After nearly all the new-build ship industry left Europe since the 1980's, we

now run the risk of having to say farewell to Europe's ship repair and maintenance industry.

A recent impact assessment on applying such overcautious factors showed that 90 to 50% (depending on the eco-region) of the AF paints would lose their approval. The ones still passing such assessment would only contain copper as the anti-fouling component. Theoretically such copper based anti-fouling paints would only be acceptable for pleasure craft boats, but would be absolutely inefficient for deep sea vessels which need a broad spectrum of biocides to keep their hulls clean. CEPE and SEA Europe (the association of shipyards and marine equipment manufacturers) have agreed to address this issue in those countries where it would have a high socio economic impact. National representatives will meet with their ministries for employment and for environment.

Their message will be: Using overly conservative safety measures would lead to the disappearance of effective antifouling paints being applied in European docks and therewith kill the ship building and repair industry in Europe. At the same time ship-owners would still have access to these much needed effective antifouling paints outside of Europe.

BETWEEN THE WATER AND THE STEEL

Towards a sustainable future with anti-fouling and corrosion protection coatings.

Under this title CEPE will organize the next IPPIC GLOBAL FORUM on MARINE COATINGS.

It will be held in ROTTERDAM, Europe's main port on 23 and 24 April 2015.

The forum aims to bring a wide range of stake-holders from the marine and shipping industry together. Comprising:

- » National or EU legislators
- » Regulatory bodies (e.g. IMO)
- » Shipyard associations
- » Ship owner associations
- » Classification societies
- » Scientific institutions
- » Water-quality monitoring bodies

A detailed Forum programme will be available by December 2014.

COSTS OF CERTIFICATIONS

The producers of Marine Coatings are still faced with a lot of administrative burden for the 'tin-free' declarations and other classifications. With no Mutual Recognition between the classification bodies this means a non value-added cost.

The MC sector group continues to evaluate pathways that could reduce such costs.

Ballast tanks are needed to provide stability to vessels at sea. Sea water is pumped in the tanks to provide weight and lower the vessels' centre of gravity. This seawater will contain some of the living species from the place where the water is taken in. When unloading the water at a next harbour environmental problems may occur due to these invasive species. Plants, algae or animals in the plankton can be introduced in the tanks in some place in the world and be released in another place. Since 2004 an international convention on the treatment of ballast water should have been signed but some countries are still reluctant as technical issues have not been solved entirely. To eradicate the species the contents of the ballast tanks are treated with systems such as chlorination or UV radiation. Although many vessels have the

equipment the implementation is still causing issues, one of which is testing the resistance of the protective coating inside the tank to a treatment. Such testing rests with the water ballast treatment companies. The CEPE members agreed that they would support such companies with the supply of representative sample panels.

A joint project between IPPIC and the Corrosion Societies NACE resulted in the proposal to the IMO BLG 17 group who discussed the compatibility between ballast water management systems and the ballast coatings.

YACHT PAINTS

Solvent-based alkyds are used in the yacht paint market. As discussed under the Decorative sector these also use MEKO and may be threatened by the lowering of the exposure levels.

PROTECTIVE COATINGS

SUSTAINABILITY, THE ROLE OF COATINGS IN THE LIFE OF A STEEL BRIDGE

With the availability of Life Cycle data on the paint formulations in CEPE's database, the Sector Group agreed to do a Life Cycle Analysis. The LCA should address the impact of varying coating thicknesses on the sustainability of a steel bridge. So that bridge specifiers can be informed on these results. The coating thickness (or dry film weight) is a key parameter in maintenance specifications for coatings. It is known that with thicker layers longer maintenance intervals will be achieved.

The LCA study covered the building and maintenance of the bridge for 100 years, and looked at three coating systems with varying lifetimes (15, 25 and 40 years). The environmental impact of the coating system itself (number of layers, solid content, etc.) and the maintenance schedule (closing the bridge and rerouting traffic) were key parameters of the study. The overall conclusions will be presented at the CEPE annual conference.

GUIDANCE FOR THE INDUSTRY

To clarify or to ensure a harmonized interpretation among the industry partners the Sector Group issued 3 documents:

CEPE position on the term 'Solvent-free' Coatings.

This position addresses the discrepancies between data sheets, which declare coatings as solvent-free on the one hand, whilst giving VOC data on the other. It aims to improve the transparency of the market and offer users of coatings a method to assess the products available.

Guideline for VOC (Volatile Organic Compound) determination for the Protective Coatings Industry

This document is intended as a guideline for common ap-

roaches to be applied by the Protective Coatings industry concerned with the European directives on the limitation of VOC emissions.

CEPE information note to suppliers of Protective Coatings concerning EN 1090 and paint.

The Construction Products Regulations 2011 requires manufacturers of construction products to provide a 'Declaration of Performance' (DoP) and apply a CE Mark to their products. This note provides the suppliers of protective coatings responses to question they may receive from the steel fabricators.

BPA

Protective coatings (PC) are used almost everywhere where steel or concrete needs protection and they heavily rely on epoxy coatings. Hence steel bridges, poles, oil platforms, windmills or tanks are protected by these so called 'heavy duty' coatings. Epoxy coatings always contain Bisphenol A (BPA) as it is an essential monomer for the polymerization. It came up this year that epoxy coatings are in the loop of the BPA evaluation under the Community Rolling Action Plan CORAP 2012. Not much for human exposure (this is limited to water tanks that are regulated for decades anyway) but for Environmental exposure. Indeed, Germany as Evaluation Member State (eMS) noted that the REACH Registrants had stopped their assessment up to the stage that BPA stops to exist, i.e. when it is bound in the polymer. The eMS referred to REACH that requires evaluation from cradle to grave, i.e. asked questions on the fate of BPA as residual un-reacted monomer but also on the fate of the polymers as a potential source of BPA when breaking down in the environment. This is a first example of the need for downstream →

users to be involved, starting from the necessity to be kept informed of the potential consequences of the evaluations, but also because Registrants will need information from the supply chain on specific uses and potential exposures. The PC Technical Committee is in contact with the Registrants and is expecting more interactions in the coming year.

INTUMESCENT COATINGS TECHNICAL COMMITTEE

During this year members of the Intumescent Coatings Technical Committee (ICTC) have been actively involved, as representatives of their respective national standards body, in the finalization of an intumescent coatings product standard (prEN 16623). This standard, which covers the performance testing, specification, application, inspection and maintenance of intumescent coatings, has been prepared by Working Group WG13 in CEN/TC139, Paints and Varnishes. Currently, the draft of a Formal Vote version of the standard is being considered by TC139 for issue for approval.

A further key objective made major progress during the year. CEPE continued to lobby the European Commission on the conversion of prEN 16623 into a mandatory harmonized standard, within the scope of the Construction Products Regulation, via a mandate issued to CEN.

CEPE has been working jointly with the EAPFP, which has similar ambitions for other passive fire protection products, on the development of a mandate covering all product groups, the standards for which would be prepared in relevant CEN technical committees. During the year, the Commission sought a view from its standing consultative committee, and from CEN, on a draft mandate, and currently is working on the finalization of a formal mandate to CEN. Industry discussions are already underway

STANDARDS

The group is also involved in standardization e.g. review of EN12944 or commenting on other standards such as the Norsok M501 for coatings on subsea components used above 50°C.



EU SECTOR GROUPS AND THEIR CHAIRMEN

INDUSTRIAL WOOD COATINGS



Vacant

CAN COATINGS



Ezio Braggio

VP Packaging Valspar EMEAI,
Bubikon,
Switzerland

COIL COATINGS



Pasi Niemisto

The Valspar 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



Luc Turkenburg

Regulatory Affairs Manager
AkzoNobel,
Car Refinishes BV,
Sassenheim, The Netherlands

PRINTING INKS



Felipe Mellado

Corporate Vice President
Marketing & Technology,
Sun Chemical,
Alcala de Henares, Spain

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.



JEAN-MARIE GREINDL

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.



ERKKI JÄRVINEN,

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,

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.



CARLO JUNGHANNS,

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.



CONRAD KEIJZER,

holding a Master in Industrial Engineering, started to work for the Shell Group in 1993. From 1994 until today Conrad Keijzer held different positions within AkzoNobel NV. In his current function, he is Member of the Executive Committee of AkzoNobel, responsible for Performance Coatings. His past functions include: Managing Director BY Industrial Coatings (NL) from 2012-2013. Managing Director BU Packaging Coatings (DE) from 2008-2010, SBU Director Automotive Plastic Coatings (SP) from 2004-2007 & General Manager North America Pontiac (USA) from 2003-2004, after starting his career as General Manager Industrial Coatings Mexico (MEX) in 2002.



FELIPE MELLADO,

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.



JACQUES MENICUCCI

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 FIPPEC and served on the CEPE Board from 2004-2010.



FRANCISCO PERELLO,

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.



HENNER STRATENWERTH,

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 VC.



ARMODIOS ST YANNIDIS

Armodios was born in Piraeus Greece in 1972. He graduated from the French Lycee Leonin High school, studied Business administration in the Southeastern College of Athens and got a master's degree (MA in management) by IST Studies (University of Hertfordshire). Since 1995 he held managerial positions in the family owned group, Yannidis Group, and has been involved actively in the marketing, the operations and the international departments of the paint division Vitex. Since 2000 he is an executive Vice President of the Group and CEO for the paint division. In addition he is the President of the Board of Prodis SA, a company active in the chemical raw material market for cosmetics and detergents. Armodios has served in positions representing the paint and chemical industries in Greece. For the Hellenic Association of Chemical industries he has been a member of the Board since 2002 and the President of the Board from 2005 to 2009. →



MARLIES 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".

NEW CEPE BOARD MEMBERS



ALAIN BARONNIER

French, 54
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.



HARALD BORGHOLTE

09 March 1964
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

German, 30 April 1957
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)



MARC DE POTTER

20 April 1951
Since 1997, he joined Aaltermal as General Manager. Aaltermal 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.

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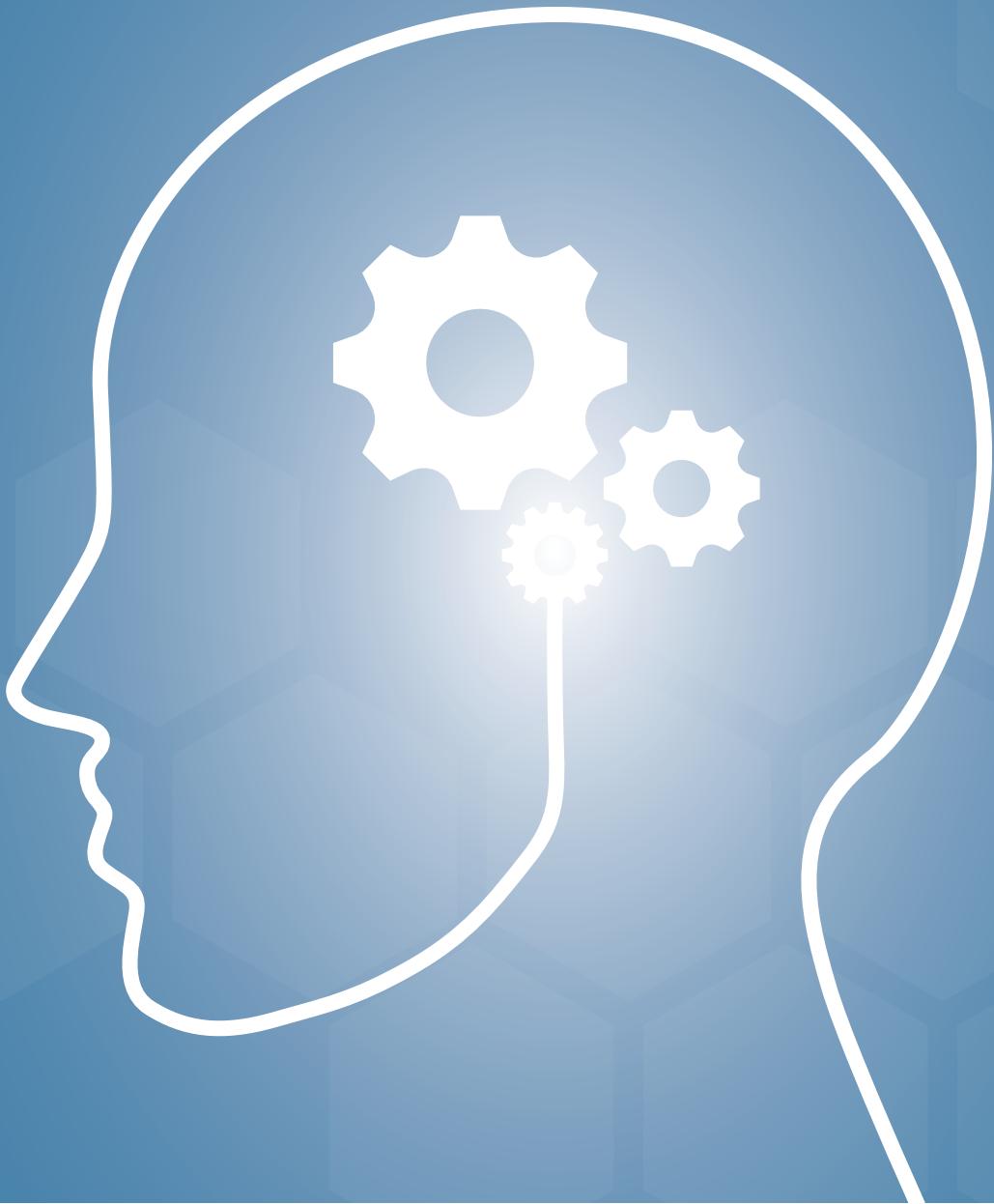
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