TABLE OF CONTENTS

- Editorial by Jan van der Meulen, Managing Director, CEPE ....3
- Reason to act ................................................................. 4
- Sustainability................................................................. 5
- Reach ............................................................................... 7
- Hazard communication .................................................... 9
- Indoor Air Quality ............................................................ 11
- Nanotechnology ................................................................... 12
- Biocides ........................................................................... 14
- Education ........................................................................... 16
- Transport ........................................................................... 17
- IPPIC .................................................................................. 18
- EuPIA Annual Report ........................................................ 20
- Aerospace Coatings ........................................................... 25
- Decorative Coatings ........................................................... 26
- Artists’ Colours ................................................................. 28
- Marine Coatings ................................................................. 29
- Protective Coatings ............................................................. 30
- Intumescent Coatings .......................................................... 31
- EU Sector Groups and their Chairmen ................................... 32
- European Representation of Interests ................................... 33

CEPE General Assembly 2013 is sponsored by:

[Images of sponsors: AkzoNobel, BASF, Boero Group, Feidal Coatings, PPG, Teknos]
DEAR READER,

The EU Market.
The construction industry in most EU member states continues to face difficulties. This made the decorative paints business for 2012 remain at best flat in some countries, but went further negative in most EU countries. The bad weather conditions aggravated the already difficult market situation for the first part of 2013. One wonders when the lowest point has been reached. Being much dependent on the GDP it may at the earliest be in 2014 that some improvement is to be expected.

As the industrial activity in the EU 27 kept up better during 2012 the industrial paints saw a reasonable year, but perspectives for 2013 are not optimistic.

For printing inks the volumes for news and publication saw a further drop during 2012. The inks for packaging held up better. The costs of raw materials in 2012 remained stable to going slightly downwards.

Sustainability in the paint industry.
Every more square meters in the construction industry are nowadays being commissioned according to the ‘green building principles’. The paints used in such buildings need to be evaluated for their eco footprint which is compiled in an Environmental Product Declaration. With this year’s launch of CEPE’s Life Cycle Inventory data base and the accompanying Eco-footprint tool such evaluation can now be made by every CEPE member.

But besides such detailed requests CEPE will in the coming years also have to give consideration to communicating sustainability to the consumers. Fair and transparent criteria need to be developed and agreed for communicating the rather complex topic of sustainability to this audience.

Legislative impacts.
The high density of regulation nowadays in Europe forces our industry to be constantly on the alert for the ingredients we can use for the manufacture of our products.

A lot is also still going on in the way we communicate hazards to the users of our products. We have to make sure that the reading of the safety instructions is not becoming repulsive as it is swamped in a stack of paper.

This annual report made public at CEPE’s Annual Conference and General Assembly 2013 shows you where the industry experts have made their efforts to address the many legislative changes or initiatives that impact our industry.

Innovation.
To maintain a competitive position in the world and to improve profitability it remains our most important assignment 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 dialogues with authorities to not burden such new developments with disproportionate rules.

Education.
CEPE has started this year to look into the availability of human capital for the future. The number of technical graduates our industry needs is higher than the academic institutes currently supply. Efforts must be given together with these institutes to raise the attractiveness and visibility of our industry with the next generation in order for them to pursue interesting careers.

Jan van der Meulen, Managing Director, CEPE
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).

CEPE functions and assigned WGs

<table>
<thead>
<tr>
<th>CEPE function</th>
<th>Addressed by CEPE Working Groups</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Monitoring upcoming issues (radar for industry)</td>
<td>• SHE Advisory Board (SHEAB) SHE topics (approx. 25)</td>
</tr>
<tr>
<td>• Advising for issue–treatment</td>
<td>• Toxicology Advisory Substance (raw material) specific topics (approx. 40)</td>
</tr>
<tr>
<td>• Preparation (of proposals)</td>
<td>• Issue related Task Force in case of industry wide issues</td>
</tr>
<tr>
<td>• Consultation of members not participating in WG</td>
<td>• EU Sector Group when sector specific action is required</td>
</tr>
<tr>
<td>• Propagation and feedback</td>
<td>• Platforms of Directors or staff members of NAs + CEPE</td>
</tr>
</tbody>
</table>
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.

**CEPE LCI project**
The first track of making Life Cycle Thinking accessible is completed.

**CEPE launched its LCI database and Ecofootprint tool. They will help members answer sustainability questions with confidence**

What started in 2010 as a new topic to be addressed by a members’ working group is today turning into two valuable deliverables for every CEPE member. Comprising a first time ever up to date industry Life Cycle Inventory database and a simple Eco-footprint tool that is adequate to do the elementary Life Cycle calculations. It is now up to the individual CEPE member to get familiar with the tool and database to find his way on the track to more sustainable paint solutions.

Jan van der Meulen, CEPE’s Managing Director at the launch July 10, 2013.

The LCI database and the tool will be kept up to date by the CEPE project group, while the CEPE members can use them for their varying objectives.

**CEPE LCI Project deliverables**

---

**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 (RM) from all CEPE sector groups were collected to be included in the database (over 260 RM in the final version).

The second part of the database compiles paint manufacturing data, collected directly from member companies’ sites. Resulting from the project is also a reference manual detailing the methodology used during the project.

**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 eco footprints for their products using both the manufacturing and the raw materials databases. Depending on his demands the CEPE member can choose to make a result with only carbon footprint or with the extensive list of footprint impacts. See example of an impact table here above.

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;

Roll out and training
In the months to come, the National Associations will set up introductions for the local members and make them familiar with the tool and database.

The years to come
The next track to be considered by several CEPE paint sectors is building-up LCI data on the steps after paint leaves the factory (transport, application, end of life).

The current LCI-database will also be reviewed annually by the CEPE project team to identify the need for a revision of data or the inclusion of new raw materials.

Environmental Product Declarations – harmonization at CEPE level
Environmental Product Declarations (EPDs) are a way of communicating the environmental impact of products according to the standard EN14025. But various countries have different requirements for the information that should be contained in an EPD, and the format it should have.

To try to have an overview of the multiple formats and contents of EPDs around Europe, and to come to an Industry recommended format, CEPE has created the Product Category Rules Task Force in 2013. The task force has as an objective to define rules for EPDs of paints to be created, harmonizing at an industrial level the European EPD landscape. This work will take into account the recommended Product Environmental Footprint methodology created by the European Commission.
Important milestones passed, but much more implementation work ahead

In its report the Commission concluded that REACH is working well and delivering on the objectives that can currently be measured. **No changes** will be proposed to the main legal requirements of REACH, which is important to assure stability for industry. However a number of improvements were recommended in the implementation of REACH, among them the quality of registration dossiers and **safety data sheets** (more below) and consistent interpretations by enforcement authorities. The need to reduce the burden and financial impacts on **SMEs** (small and medium-sized enterprises) was highlighted, and a number of specific actions have been initiated in this area. The Commission also concluded that REACH is the right framework for risk management of **nanomaterials** (see separate article).

**REACH information in the supply chain**
CEPE is involved in a large number of activities focused on improving the quality of data used in registrants’ Chemical Safety Reports (CSR) and communicated down the supply chain, e.g. in safety data sheets (SDS) and exposure scenarios (ES). Many of these activities are organised within the framework of the ECHA Exchange Network on Exposure Scenarios (ENES), which has been meeting twice per year since November 2011, and in consultation with industry and Member States, ECHA has now created the “CSR/ES roadmap”, an ambitious cross-stakeholder action plan running through to 2018.

A few examples of activities ongoing in CEPE and DUCC:
- **Specific Environmental Release Categories** (SpERCs) and **Specific Consumer Exposure Determinants** (SCEDs), to enable more realistic exposure estimates in the CSR;
- Standardising the **identification** and **codification** of ES in SDS using standard phrases, a Table of Contents, harmonised layout and more, and enabling electronic transmission through the ES-Com package;
- Producing useful information on safe use of mixtures, for example through a **Generic Exposure Scenario** (GES) approach;
- CEPE intends to publish the output of its project by the end of 2013.
CEPE has also been an active contributor to the revision of the ECHA Guidance for Downstream Users, due for publication by December 2013. In the near future DUCC will also lead an activity to facilitate DU Chemical Safety Assessments, to aid formulators or end users whose uses lie outside the conditions covered by the received ES.

**Evaluation of REACH dossiers**

The first Letter of REACH stands for Registration, the second for Evaluation. Registration is done through the submission of dossiers to the European Chemical Agency (ECHA). Only about 5% of the dossiers are reviewed by ECHA for their quality (and quality has been pointed out as being an issue). However, when authorities have concerns about chemicals they can propose to evaluate them. Actually, ECHA is proposing every year a new list of substances to be evaluated under the Community Rolling Action Plan (CORAP). The first CORAP list was issued in Q1 2012 and a new list in Q1 2013. The first list identified 90 substances to be evaluated between 2012 and 2014 and the evaluating Member States were identified. The second list contains 115 substances out of which 62 new substances. CEPE has interest in several of the substances already listed and likely more in the future CORAP lists. Examples of substances that are under evaluation or are planned to be evaluated: the isocyanates TDI, MDI and HDI, BADGE, toluene, TiO2, imidazole, MEKO, acrylic monomers etc. For that reason, discussion has taken place on the possible creation of a new sub group of CEPE for the follow up of these evaluations. Indeed, the evaluations may conclude that there is no problem for the continued use of the substance, but is likely in many cases going to conclude that there is a problem (the selection criteria are based on difficult properties). Open question will be raised and a limited period will be given to the registrants to provide adequate answers. Registrants may need the support of downstream users such as CEPE. We have had the case of BPA in 2013.

**Authorisation of dangerous substances under REACH**

The third letter of REACH stands for Authorization. When a substance is put in Annex XIV of REACH it can only be used after a certain date if an authorization has been granted. This authorization is for a limited period of time. In the application dossier demonstration must be made that the benefit for the society outweighs the risks, that there are no alternatives and that a plan is made to substitute it. In other words, you do not want a substance to be in Annex XIV. What can make a substance subject to Authorization? It can be the result of the evaluation described above, but it usually starts with the identification of Substances of Very High Concern (SVHCs). Typically these are CMRs Cat 1a and 1b, PBT (Persistent, bio-accumulative and Toxic) or vPvB (very persistent, very bio-accumulative), but REACH also allows the identification based on other criteria such as respiratory sensitizers, endocrine disrupters or substances of equivalent concern. SVHCs are then put in candidate lists for authorization. There are currently 144 substances in that list and potentially 2000-3000 substances in the future. ECHA is working on a roadmap for the identification of the remaining SVHCs by 2020.

The Authorization process is yet untested and Industry as well as ECHA will learn by doing. There are currently 10 intentions expressed for applying for authorization. The aerospace group will also apply for strontium chromate.
The communication of product hazard information is a long-established issue in CEPE, but one which is constantly evolving. Every member is affected by the rules to some extent, and complexity is constantly increasing, so industry guidance and common standards are as important today as they were in the earliest days of the old directives – perhaps even more so.

Classification, labelling and packaging
The CLP Regulation, (EC) No. 1272/2008, which implements the UN Globally Harmonised System (GHS) in Europe, will become mandatory on 1 June 2015 for mixtures, which constitute the vast majority of CEPE members’ products. In contrast to the old Dangerous Preparations Directive, a lot of official guidance is available at European level on how to comply with CLP; nonetheless there are still aspects for which members need further clarification, simplification or industry-specific advice.

CEPE’s Technical Committee Labelling and Safety Data Sheets (TC-LSDS) develops tailored guidance for members: publications in the last 12 months include a position on the interpretation of Article 33 (interface between supply and transport labelling) and a short model communication designed to explain the changes to customers. Current priorities for inclusion in CEPE’s CLP labelling guidance include the selection of precautionary statements and the incorporation of supplementary phrases for products treated with biocides. Common practical issues affecting many formulating sectors, such as supply labels on transport packages and the use of fold-out labels, are being addressed in conjunction with other associations in DUCC (Downstream Users of Chemicals Co-ordination group).

The CLP Regulation is subject to a constant rolling programme of ‘adaptation to technical progress’ (ATP – see graphic), to update the list of official harmonized substance classifications in Annex VI and/or to align the regulation with the latest revised edition of GHS. The 4th ATP, Regulation (EU) No. 487/2013, implements updates from the 4th revised edition of GHS but also some additional EU requirements. Discussions will begin in 2013 on the 7th ATP, to align with the 5th revised edition of GHS (see below); CEPE participates as an observer in the relevant Competent Authorities sub-group, with the aim to achieve the best implementation for our industry.

Steering the future CLP: UN GHS
GHS is updated every two years and these revisions are adopted into the CLP Regulation approximately two years later. The EU cannot change the criteria, so it is important for industry to influence the content of GHS at UN level.
CEPE, as part of IPPIC, participates in the UN Sub-Committee of Experts on the GHS and in several related working groups. The 5th revised edition was published in July 2013 and the 2013-2014 biennium is now in progress; key issues being followed by IPPIC include classification of desensitised explosives (incl. industrial nitrocellulose), viscosity criteria for aspiration hazard, precedence rules for precautionary statements and arranging label elements (incl. small packages and pre-printed labels). One goal of the Sub-Committee is to improve harmonization between GHS and transport of dangerous goods, to make compliance easier for members.

Safety Data Sheets
Whilst the product label is paramount for consumers, safety data sheets (SDS) are an important hazard communication tool for industrial and professional users. In the EU, SDS requirements form part of REACH; see the separate article for more about the ‘extended’ content of SDS (exposure scenario information). CEPE (TC-LSDS) continues to maintain and update its Guideline on Safety Data Sheets, and the related CEPE Phrase Catalogue; Update 9.3 of the Catalogue was published in March 2013, including hundreds of new phrase translations. The advice in the SDS Guideline is constantly reviewed and updated in the light of members’ experiences with software systems, customers and enforcing authorities. Compliance software providers now participate in TC-LSDS as affiliated members of CEPE, and bring valuable expertise and an extra perspective to this work. CEPE also participates in other industry SDS groups, e.g. at Cefic, to share best practice and establish common guidance across sectors.

The obligation in REACH to (actively) provide new or updated SDS to customers can create an administrative burden for members, especially smaller companies. Together with other industry sectors CEPE is lobbying the EU’s Forum on Enforcement for acceptance of internet-based electronic methods of provision. In the meantime some National Associations have been developing web platforms to help members distribute their SDS more easily to all relevant recipients.

Information for PoisonCentres
Between 2010 – 2012 the European Commission carried out a review of the possibility to harmonise the information on hazardous mixtures which is notified to Poison Centres throughout the EU. It was concluded that such harmonisation is possible and welcomed, and discussions have been continuing on a number of the practical aspects of notification. CEPE has been part of the industry delegation throughout this process. Notification using a harmonised dataset and an electronic (XML) format will bring benefits for members, particularly multinationals, but reporting obligations will inevitably increase for some companies (not all Member States currently require such notification to Poison Centres). Among the concessions achieved so far by industry are an exemption from reporting for R&D/testing mixtures, and reduced dataset requirements for mixtures intended for industrial use only. IT solutions will be a key factor in successful implementation of the notification requirements.

The Commission plans a first draft legislative proposal by the end of 2013, and a legal review and feasibility study are to be initiated. In 2014 a clearer picture will be available of the future reporting requirements and the transition period, so we can plan for the compliance support CEPE needs to offer its members.

CLP implementation deadlines and CEPE guideline validity

![Graph showing CLP implementation deadlines and CEPE guideline validity](image-url)
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
Schemes on Indoor Air Quality exist in France, Germany and the Nordic countries. Belgium is about to join the club, showing the constant interest about this topic.

The European Commission drafted a first version of the 7th European Environmental Action Programme in December 2012. In this draft, no mention was made of Indoor Air Quality, but amendments both from the European Council and the European Parliament brought Indoor Air Quality back into the debate. The text is still being discussed, but a definitive proposal should be adopted by the end of 2013, suggesting work may be done on European level in the future.

On another note, CEPE is still following closely the work done by the Joint Research Centre of the European Commission on “Lowest Concentration of Interest” (LCI) values. LCI is “the lowest concentration above which, according to best professional judgement, the pollutant may have some effect on people in the indoor environment”. The project is most probably going to stop before being over due to the lack of mandate and budget to go on.

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 gone through the voting period and should be available by the end of 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.

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.
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, 2 years after publication. This definition will only be in application when integrated in EU legislation where needed, and a revision is planned for 2014.

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 published on 17 February 2012 a position paper that highlights the weaknesses of this definition according to our industry.

CEN and ISO committees are also working on the terminology aspects of nanomaterials. CEPE is participating in some sub-groups 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

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 on October 3rd 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, and the modifications should be ready by the end of 2013.

The conclusions also addressed the issues of nano inventories and transparency: the European Commission is creating a web-platform to gather all existing information on specific nanomaterials, and an impact assessment has also been launched to ensure that
materials that could fall out of the REACH framework (i.e. below the 1 tonne threshold) are well covered.

**Nano inventories**
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. As announced last year, the French have launched their inventory last January. Companies had until the 30st of June 2013 to declare nanomaterials used above 100g per year, and provide information on the nanomaterial, its uses and users. There was controversy on the materials that had to be registered within our Industry, as the definition used in the French decree refers to the European Commission recommendation, being broad enough to contain powders with a nano-tail, like most fillers and pigments. But CEPE still considers that once nano-particles are bound in a matrix (either solid or liquid), there should not be any obligation to register or label articles or mixtures containing these bound nanomaterials. To defend this idea, the CEPE nano working group has drafted a position paper taking into account the many recent European studies showing that nanoparticles are aggregated, agglomerated and integrated into the binder and stay firmly attached to the coated object. Other inventories are starting to emerge across Europe: Belgium should be the next country in line, closely followed by Italy. Some countries, like Norway, have updated existing product inventories to cover nanomaterials.

**Position on Nano labelling**
CEPE 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.

**CEPE-Guidance for the Handling of engineered Nano-Objects in the Workplace**

This document provides guidance on how to organize a safe workplace when manufacturing paints, coatings, artists’ colours and printing inks containing nanomaterials. The guidance was developed by the Nanotechnology Working Group of CEPE, and is based on existing guidance documents from various sources such as Industry and nanotechnology experts. This document is not all-inclusive but attempts to advise employers on how to protect their employees who work with nanomaterials. It is not developed to support the managing of occupational health risks arising as a consequence of any non-intentionally released nanomaterials (like diesel exhaust or welding fume), or cover materials which have been used safely for decades such as pigments or resins and are only now considered as nanomaterials.
As reported in our previous Annual Report, the new Biocide Product Regulation (BPR) applies from 1 September 2013. In this chapter we will evaluate the state of play for the main issues for CEPE Members.

CEPE Members can broadly be considered into two categories:
1) Manufacturers of active substances and/or biocidal products in PT8 (Product Type) (wood preservatives), PT21 (anti-fouling products) or PT2 (disinfectants and algacides not intended for direct application to humans or animals), and
2) Users of biocidal products (PT6 in-can preservatives, PT7 dry-film preservatives, PT10 masonry preservative). This covers most CEPE Members including the printing ink sector.

For the first category the level of involvement in the biocide legislation is much deeper. Only PT21 are addressed within CEPE under the Marine Coating sector.

CEPE’s anti-fouling manufacturers
The anti-fouling group has been deeply involved in biocide issues for many years and has been successful in advocating their specificities to the biocide authorities mainly at this stage at the technical meeting level. There are still, however, challenges ahead.

Together with biocide suppliers they continue working on issues linked to environmental risk assessment scenarios, human health or efficacy assessment. Anti-fouling biocide active substances were under review since the deadline for dossier submission in 2006. After 7 years of hard work the first actives are almost up for another level of discussion, i.e. of political nature. Indeed, the regulators have decided to speed up the review of actives that were subject to the first submissions, among which PT21, therefore we can expect the work on these actives to move on in the coming 2-3 years. This will be followed by the work on PT21 anti-fouling paints. Indeed, the EU review of active substances is a first step that is followed by the need to get each PT21 paint authorized in each Member State where sales are foreseen.

Several uncertainties remain for companies, such as the cumulative risk assessment approach that will apply to PT21 products using more than one active and classified co-formulants (as is most times the case). The group has recognized the need to alert the Authorities at high level on the consequences of applying their very conservative approach to risk assessment with possible high consequences on EU Shipping Industry with little or no benefit for the environment.

CEPE members as biocide users
As indicated above most CEPE members are users of biocidal products, hence up to now our involvement was limited due to the legitimate expectation that biocide suppliers will do their work and ensure continuous supply. As time goes by we hear here and there that activities are ongoing with little impact on the market. However, we also realize that this extremely difficult legislation could impact us more than expected in the coming years.

Two specific activities have developed further under the Decorative coatings Technical Committee: the leaching of dangerous substances from coatings exposed to weathering and the labelling of treated articles. In addition, this increased awareness has lead CEPE to create a new horizontal group covering biocides as users of biocidal products with the unanimous support of the Board in June 2013.

Leaching of dangerous substances: Industry to fill data gaps
Dangerous substances used in outdoor paints may leach into the environment during rainfall events. The biocides used for in-can,
dry-film or masonry preservation have to undergo thorough evaluation under the biocide legislation, when the construction legislation is targeting a number of other substances. When leaching from a façade, the substances can either go into the soil under the façade or on the sealed surface (pavement…) underneath and then run off to the drainage and sewer system, up to the sewage treatment plant or directly through the river. One has to scientifically demonstrate that this leaching will not affect the environment and the leaching evaluation is an important and integral part of this exercise.

Under the Construction Product Regulation new leaching tests are being developed which we believe will be too conservative and will not represent real life leaching under intermittent wetting. There will be further activities with regard to the use of the laboratory method EN16105 with the hope to demonstrate that outdoor coatings will not need further testing (‘wft’). Biocidal actives seem now to be out of its scope.

Biocidal active substances are evaluated for their leaching behaviour under the Biocide Product Regulation (BPR). Leaching studies have to be provided to demonstrate safe use for the relevant coatings placed on the market. A dedicated meeting was organized at CEPE in June 2013 with the biocide suppliers on this subject. It was concluded that they need CEPE’s input as they recognize that at this stage they are unable to demonstrate that they will cover all CEPE members’ needs. The importance of the issue was agreed together with a clear will to work together.

The first step is in CEPE’s hands to identify relevant coating formulations for the EU market

CEPE will then carry out a number of laboratory leaching studies with them to further analyze the leaching behaviour of the key PT7 and PT10 substances. As a next step the biocide suppliers will agree on the launch of further semi-field leaching studies at their costs. This exercise should allow our industry to demonstrate to the BPR Authorities that 1) leaching studies done on a limited number of worse case representative formulations should cover most outdoor coatings, and 2) if possible establish a correlation between laboratory and semi-field studies.

Labelling of treated articles

CEPE agreed in September 2012 on the need to address the specific new labelling requirements for treated articles of the BPR under Article 58(3). Indeed, chemical mixtures like paints are treated articles under the BPR and in certain conditions (a claim of a biocidal property is made, such as protection against discoloration due to fungal growth) there is a new requirement to add specific information on the label, such as ‘This paint contains a biocidal product for the preservation of the dry film’ and the names of the PT7 actives used. A CEPE Guidance “Labelling of Treated Articles” was developed and endorsed by the Decorative coatings Technical Committee in May 2013.

New horizontal Biocide Task Force within CEPE

In addition to the activities explained above, the new CEPE Task Force will address other issues of interest. The European biocide legislation is important to CEPE members for different reasons:

- Need of sufficient ‘tools’ for effective microbial control (i.e. enough biocidal products based on various biocide active substances)
- Need to follow-up the future classification of active substance and biocidal products
- Need to understand if restrictions of use will apply (product type, user type, concentration, application method, target pest, risk mitigation measures, area of use, indoor versus outdoor use…)
- Need to understand who are the approved suppliers
- Need to support biocide suppliers where relevant, and advocate our industries specificities towards the relevant evaluating authorities
- Need to follow up on other horizontal issues that could be addressed first under the biocides, such as cumulative risk assessment, mixture toxicity, endocrine disruption, substances of concern or comparative assessment.

Therefore, this new Task Force aims at understanding and communicating the developments of the European biocide legislation of interest to CEPE members considered as users of biocidal products. For the first meeting, representatives from eight member companies and three national associations volunteered to participate.

No smooth future foreseen with the Biocide Product Regulation

The biocide legislation in Europe is overly complex, conservative, costly and burdensome and the new BPR will not improve this compared to the Biocide Product Directive (BPD). Even though some have the hope that the concept of Product Family or the Union Authorization should help industry, a close look into the practicalities of the implementation of the new measures does not give much hope. ECHA as the Central Agency has been tasked to handle some BPR activities, but they will be heavily dependent on Member State representatives whose views are not balanced. The system is politically biased.

The review programme of the existing active substances received an additional 10 years and should now be finalized by end 2024 (initially May 2010). Given the high number of actives/PTs still under review there will be an increasing pressure to speed up the process. Means identified to reach this goal will make life difficult for active substances with limited possibility for industry for its defence, somehow mimicking the process of the Risk Assessment Committee (RAC) who reviews the classification of chemicals. Biocides are a limited part of water borne coatings or inks but they are essential elements to preserve their integrity. CEPE has now re-considered the level of attention required.
The main conclusion of the CEPE conference held last year in Seville was described for the paint industry as to maintain and strengthen its leadership role in innovation. Volume-wise the centre of gravity has shifted to Asia, where now more paint is produced than in Europe and that will not reverse. Europe’s assignment will be to invest in the next generation of paints which are having more functionality or are more sustainable in their production and consumption.

One critical parameter for innovation forms the access to new raw materials. Having close co-operation with suppliers to evaluate new substances in our formulations. This goes via the well-known steps of in-house evaluation as well as the ultimate users feedback. In other words sufficient time should be available with the R&D personnel to run through such steps. We all know that the current efforts of coping with REACH have not been supporting the innovation portfolio for most of the players in our industry. But even if some day the attention for REACH would come to more reasonable proportions our industry may still not be in a good position for innovation.

Looking at the future the most critical parameter could be the access to the right sets of brains. Two trends do not play in our favour nowadays. In many companies it is reported that in the coming 5 to 10 years a drain of experienced and appreciated researchers will happen as they leave the company for retirement. And there are not enough new replacements as only a limited number of students nowadays choose for a science education.

So if innovation is our way forward we must invest in the battle for talent.

The European Commission has made the same observation and sees Europe’s innovation potential in danger. Having the so-called ‘smart manufacturing’ high on its agenda it is logic that they want to develop programmes to attract more students in the disciplines of Science, Mathematics, Engineering and Technology. For the paint and ink industry we need students in the field of chemistry and more particular in the paint and ink chemistry. How do they find their way to that? How interesting is a career for them in our colourful industry? These and more questions need to be addressed on European and national level.

For this purpose CEPE has established in March 2013 a forum on Education for the Paint and Ink Industry. HR Directors of companies, National Associations and universities discuss the possibilities of increasing the visibility and attractiveness of our industry and agree on the educational elements that the future paint and ink chemists require.
Safe, timely and cost-effective transportation of products is vital to the paint, printing ink and artists’ colours industry in Europe. Around 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”) – currently in their 18th revised edition, and the 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 UN-ECE (UN Economic Commission for Europe – Geneva), covering road (ADR), rail (RID) and inland waterways (ADN). These have all been adopted into EU legislation by Directive 2008/68/EC (as amended).

As part of IPPIC (International Paint & Printing Ink Council), CEPE is an active participant in the relevant international transport bodies and works to achieve rules that are practicable and proportionate, in order to minimise costs, bureaucracy and delays for our members. 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 where appropriate.

Environmental hazards and transport

With the growth of water-based and other non-flammable paints and inks, there has been a steady increase in the number of products which are classified solely as hazardous to the environment (UN 3082 or UN 3077 in Class 9) due to alignment with the GHS (Globally Harmonised System) aquatic toxicity classification criteria. A large number of formerly-unregulated products were brought into scope of the transport regulations, and much of IPPIC’s recent effort has been focused on mitigating this burden.

IPPIC was part of a USA-led working group which in December 2012 successfully obtained a complete exemption from the Model Regulations for UN 3082/3077 packages not exceeding 5 litres/kg. Work continues to secure the adoption of this special provision by the separate modal regulations above.

For larger quantities, IPPIC is seeking new UN entries and more lenient packaging provisions for environmentally hazardous paints, printing inks and other materials. Although these are not yet accepted at UN level, a wider discussion has been initiated on improving classification and hazard communication in Class 9, which is likely to benefit our sector. Furthermore IPPIC’s proposal for a single description, to replace the current “MARINE POLLUTANT” and/or “ENVIRONMENTALLY HAZARDOUS” used in the sea and land modes, has been taken up by the Editorial & Technical (E&T) Group of IMO, who will seek multimodal harmonization on a new term “AQUATIC POLLUTANT”.

CEPE will publish updated guidance for members on transport of environmentally hazardous products during the second half of 2013.

Solutions for real-life transport problems

In 2012 IPPIC made a proposal for amendment of the IMDG Code, to reinstate an old provision allowing fenced transport units for palletized loads on roll-on/roll-off ships instead of closed containers. This was adopted by the E&T Group and has been submitted for ratification by the IMO Sub-Committee on Dangerous Goods, Solid Cargoes and Containers (DSC) in September 2013.

At UN level, IPPIC is pursuing a ‘common-sense’ interpretation for when the size of a label or mark may be reduced on a smaller package. This has the potential to save complexity, cost and enforcement difficulties for members without compromising hazard communication.

In 2013/2014 and beyond, CEPE/IPPIC will continue to seek regulatory solutions and develop guidance on issues faced by members, and in this context will look for increased international co-operation within our industry.
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; Mexico; Japan; Australia; Brazil; China; South Africa; and India. The 2013 annual meeting was held in San Francisco, USA. 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 San Francisco a remit was agreed for an IPPIC working group on Sustainability. The objective of this working group will be to give guidance to National Associations on the main elements that make up a sustainability programme and to look for similarity in methodologies and terminologies. Such in order to have harmonization and comparability across the globe. Working with care programmes such as Coatings Care or Responsible Care are considered as a contributing step towards Sustainability.

Monitor the agenda of meetings of the International Agency for Research on Cancer
According IARC’S monograph of 2007 the activity of ‘painting’ is considered as sufficient evidence in humans for the carcinogenicity of occupational exposure as a painter. In 2008 and 2009 IPPIC collected additional findings which have been published in the meantime aiming at an in depth critical review of the data used for the IARC study (International Agency for Research on Cancer). IARC did reference in the 2010 Monograph the IPPIC study, which stresses the need to consider the adequacy of studies control for smoking, among other confounding factors and correlations.

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

Marine Coatings
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 June 2013 in Tokyo. 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:
- Update regulatory status in regions and decide if IPPIC action is required.
- 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.
- Review of IPPIC guidance on generation of efficacy approval under biocidal product rules.
- Draft IPPIC position paper on ‘typical surface condition’ with respect to biofouling on immersed areas of ships and boats using modern biocidal antifouling and foul release coatings.
- Define IPPIC plan to work on antifouling paint performance standard.
- Review of status of ISO Risk Assessment Standards proposed by IPPIC.

A fourth Global Marine Coatings Forum was held from 6-8 November 2012 in Singapore. The forum brought together leading international senior technical and product managers of marine coatings, as well as raw materials suppliers to discuss critical regulatory and legal issues affecting the industry worldwide.

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 Dangerous Goods, Solid Cargoes and Containers. The first meetings of the 2013-2014 biennium took place in June/July 2013, and IPPIC is active in a number of correspondence groups and proposals (see separate articles in this report). Efforts to increase harmonisation around the globe and between TDG and GHS are supported by consultation of a growing circle of IPPIC experts around the world.
EuPIA, the European Printing Ink Association, working under the umbrella of CEPE, represents and protects the common interests 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.

Market Statistics 2012
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:

- Value per country total, per category Europe and Europe total
- Volume 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 95% 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 inks, technological varnishes, extenders, primers, and overprint varnishes)
- Liquid inks, solvent borne (includes flexo, gravure and 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

Key Sales Value by country (€000) Year end December 2012

[Diagram showing sales value and volume by country for 2012]
Announcement of the 11th EuPIA Annual Conference in 2014
The next Annual Conference will be held on 27th/28th March 2014 in Lisbon (Portugal).

Launch of revamped EuPIA Website
In December 2012, EuPIA proudly announced the launch of its revamped website www.eupia.org. The design, structure and functionality had been optimized for enhanced user-friendliness. Visitors will experience a clearer structure offering easy access to relevant information, simplified navigation and improved search functions which all will make finding information easier than before. The website provides information to the press, statistical material as well as a comprehensive library of technical documents on all aspects of the manufacture and supply of printing inks and related products.

Printing Inks and Varnishes Applied on Food Contact Materials
Swiss Ordinance on Materials and Articles: Provisions for Food Packaging Inks
Switzerland – as the first country in the world – had amended its Ordinance on Materials and Articles (SR 817.023.21) with provisions specific to printing inks which are designed to be applied on the non-food contact surface of food packaging. The core element of the regulation is a list of “permitted substances”, identifying the only substances which may be used in the manufacture of these food packaging inks marketed in Switzerland. This list, which has been established with the support of EuPIA, is regularly revised; the fourth edition of the list was published in December 2012 and entered into force on 1st April 2013 (http://www.bag.admin.ch/themen/lebensmittel/04867/10015/index.html?lang=en).

German Ordinance on Materials and Articles: draft amendment specifying requirements for printing inks applied on food contact materials
The German Consumer Protection Ministry had been inspired by the Swiss example. 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
and also to treat them separately in legal terms. So far, the industries’ objections and proposals have not been taken into consideration in the third draft of the Ordinance. As it stands, the current positive list contained in the third draft is incomplete. For example, it does not at all consider ingredient substances of printing inks for transient food contact, which would lead to a complete marketing ban on inks and varnishes for these applications, if the draft ordinance would become applicable as of now. Despite its fundamental criticism of the German approach, EuPIA is compiling information enabling the establishment of substance lists for each of the ink/varnish categories described above. EuPIA is grateful to be supported in this effort by partner organisations representing the raw material supply industry, such as CEFIC FCA (Food Contact Additives Sector Group), ESIG (European Solvent Industry Group) and RadTech Europe.

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) and Labelling and Safety Data Sheets (LSDS). In the last 12 months these groups have adopted improved decision-making procedures, for example for document approval.

EuPIA Exclusion List
The Exclusion List for Printing Inks and Related Products is one of EuPIA’s key public commitments to safer operations and products: it represents a voluntary ‘prohibition’ of the most hazardous raw materials, including those which are (very) toxic or are carcinogenic, mutagenic or toxic for reproduction. The 8th edition of the Exclusion List was published in November 2012, along with an update of the accompanying members-only Explanatory Note. Members highlighted a need for better communication when...
substances come within the scope of the Exclusion List due to reclassification. EuPIA will follow the procedure shown in the figure, in which the National Associations play a vital role in conveying information from and to the membership.

**Sector-specific guidance on key issues**

For a number of common issues, which are dealt with by CEPE groups and described elsewhere in this Annual Report, ETC often develops specific positions and additional guidance tailored for printing ink manufacturers or their customers:

- **Toy safety:** EuPIA’s position statement on the suitability of inks and related products for this application was updated in October 2012, and will be revised once more after the new chemical safety requirements take effect in July 2013.

- **Biocides:** inks, varnishes or auxiliary products containing preservatives will be ‘treated articles’ under the new Biocidal Products Regulation (see separate article). The CEPE guidance is equally valid for printing inks, but an additional EuPIA explanatory communication has been prepared for printers.

- **Environment and sustainability:** an information note “Environmental Impact of Printing Inks” was published in March 2013 and is being used in dialogue with printers’ associations; translations are progressing with the help of National Associations. The EuPIA statement on renewable materials is being updated. EuPIA also monitors relevant issues related to the EU Ecolabels for printed materials, and assesses the potential utility to its members of the CEPE LCI database and Ecofootprint tool (see separate article).

- **Nanomaterials:** a standard customer letter was developed for use of members in France regarding the decree on declaration of these materials.

Substance-specific issues are also monitored and addressed in ETC, for example plans by the European Commission (DG TAXUO) to harmonise “euro-denaturants” for industrial ethanol. The printing inks sector is not yet directly impacted, but input is being provided pro-actively to ensure that critical denaturants are retained.

On the broad subject of REACH (see separate article), ETC contributes by reviewing the list of substances subject to evaluation and will provide input on uses in inks as needed. Besides its other work on labelling issues and developing standardised content for safety data sheets, EuPIA LSDS is also the review panel for the ink use groups developed in the Generic Exposure Scenarios project.

EuPIA welcomes any initiative aimed at enhancing the recycling of recovered paper and continues to be an active member of 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.paperrecovery.org, and encourages members to submit entries to the annual European Paper Recycling Awards.

**Operational health and safety**

The EuPIA OSRA group supports members of EuPIA and CEPE, but also customers and downstream users, in the goal of operating at a high level of plant and occupational safety. Over the past year OSRA has continued to publish Safety Flashes and Safety Alerts on a wide variety 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 the last 12 months OSRA has published new guidance documents on Formulation Change Management Principles and Safety of Vertical Post Mixers, and updated its Guidelines on Loading High-Resistivity Powders into Vessels Containing Flammable or Explosive Vapours. A new set of guidelines on Laboratory Safety, currently comprising 3 parts, but with plans to develop further in future, is nearing completion at the time of writing.

OSRA also gave its expert input to guidance developed by other groups, such as the CEPE Guidance for the Handling of Engineered Nano Objects in the Workplace, and has issued recommendations drawing members’ attention to other valuable guidance available from raw material supplier sectors.

OSRA guidelines are made available on the extranet for use by EuPIA/CEPE members. Those intended for customers are also available on the public area of www.eupia.org.
Printing ink market remains in a precarious position – no recovery before 2014

The headwind is picking up. Developments in the market still pose a challenge for European printing ink manufacturers. Martin Cellerier, chairman of the EuPIA’s Statistics working group, described the situation of the European printing ink market as a matter of “shrinking to survive.” This year’s conference of the European Printing Ink Association (EuPIA) attracted more than 70 experts from the printing ink industry to Dublin, Ireland. Pity that the mild climate on the Emerald Isle was unable to exert any benign influence on the current economic climate in the printing ink market. As in recent years, the sector finds itself in an ongoing precarious and challenging situation. This year, the EuPIA sought to provide its members with even more comprehensive information on the printing ink market, using data culled from 28 companies, covering more than 90 % of the market in nearly every segment.

Printing ink market shrinking steadily

The downward trend of recent years remains intact, with total market volume in 2012, excluding exports, down by 4.1 % year on year to 1.095 million metric tons. However, by making price adjustments, the industry managed to avoid a similar reversal in total revenues. According to Cellerier’s data, the decline here was an estimated 0.8 %. This means that, except for 2010, market volume has shrunk every year since 2008. And the outlook remains grim.

This worrying trend continues to hit the print media segment particularly hard. In 2012, total volume there collapsed by 6.4 % year on year, the highest single decline. Thomas Lothar Hensel, president of the association, predicted that print media would have to shoulder significant losses for the next ten years, with the magazine market forecast to decline by as much as 40 % and newspapers by as much as 50 % in the period between 2010 and 2020. Yet, it was not all doom and gloom. Packaging printing inks were relatively stable. True, volumes fell in this sector, too, but the -0.2 % fall was well below the market average. Exports was the sole growth area, up 6.6 % by volume and 8.8 % by value.

Digital printing: hoping against hope?

Over and over again, it is being hoped that digital printing will ride to the rescue, rather like the 7th Cavalry. Unfortunately, said Per Frost, Longmark LLC, digital printing was only efficient on flat surfaces, and did not play any significant role in packaging. Consequently, it could not be expected to provide any significant volume growth. Hopes of a last-minute rescue were more of a “desperate attempt” to identify growth segments, he noted. It was difficult in these circumstances to come up with strategies on how to remain competitive and successful in a problematic business climate, such as this shrinking market. “The printing ink industry responds very sensitively to changes in the economic climate and is therefore directly affected by them. 2013 remains a challenging year, and there is unlikely to be any recovery before 2014,” said Cellerier. This situation aptly describes the plight of the sector, which seems to be much more vulnerable to changes in the current economic climate than other areas of the paints and surface coatings industry. Specific measures on how to counteract developments were not forthcoming. Precisely in this context, the presentation by Thomas Weskamp, McKinsey & Company on “Surviving in shrinking markets” might have been expected to spread some hope. Unfortunately, illness prevented him from delivering his paper, and a replacement could not be found at such short notice.

Focus on food packaging

“Right now, however, our focus is clearly on food packaging. Naturally, we’ll continue to monitor the other regulatory issues affecting the industry,” said Dr. Martin Kanert, Executive Manager of the EuPIA. The association had devised a strategic plan relating to printing ink regulation, he said. The EuPIA favoured a Europe-wide approach that sets down statutory guidelines for the sector. Stand-alone, national initiatives were not the preferred solutions, he noted. The Association would not be in a position to present any results on this until the third quarter at the earliest. The next EuPIA conference will be held in Lisbon, Portugal on 27 and 28 March 2014.
The new aerospace group has been created and held its first meetings. The top priority for the group is to apply for authorization under REACH for strontium chromate. This substance is key for the sector with no easy replacement and it has been proposed for inclusion in Annex XIV in the 4th ECHA’s inclusion recommendation. The group approached the chromate consortium and agreed to proceed with them in a sub group of interested companies. There are about 25 companies interested in the substance including 5-6 paint formulators. A law consulting firm is managing the consortium but an independent technical consultant will be needed to prepare the application dossier, which must contain among other things a socio-economic analysis. Indeed, for a substance included in Annex XIV of REACH the substitution principle applies and the applicant has to identify possible (or the lack of-) alternative and the benefit of maintaining the substance on the market. For strontium chromate the application must take place 24 months after its official entry in Annex XIV, which means around early 2016, and the sunset date takes place 18 months after the deadline for application. Mid 2013 there has not been any application filed yet but ECHA was notified of 10 intentions. The Authorization process is new for all parties and we will learn how it works in the future keeping in mind that this subject was the most controversial aspect of REACH during the negotiation as there is high political expectation. The group also discussed activities around chromium free primers and the interest for method standardization, but it was concluded that it was too premature at this stage. Finally, as for other groups, it is important to keep an eye on the status of some isocyanate substances due to their potential for respiratory sensitization and their possible consideration as SVHC, which is the first step for getting into Annex XIV.
When rain falls on exterior coatings it could leach out substances from these. Inspite of very limited amounts, two legislations require some level of scrutiny, namely the Construction Product Regulation (CPR) & the Biocide Product Regulation (BPR). Under the CPR a mandate was given by the European Commission for the development of new methods for assessing the leaching of dangerous substances. CEPE believes that the current method under development does not mimic the conditions of exposure of coatings and that an intermittent exposure better represents the real life. Biocides seem to have been removed from the scope of CPR, which prevents double regulation. For the other potential dangerous substances the objective of the group will be to run with representative formulations from the EU market a number of laboratory studies according to the EN 16105 standard and hope to prove that exterior coatings should be considered without further testing (‘wft’). CEPE will also look at possible correlation between the laboratory method and experiments done with external panels exposed to real weathering.

Under the BPR the discussions are much more difficult. Biocide active substances are considered by the biocide authorities to present a real threat to the environment. Safe use must be demonstrated using very stringent methodologies with huge safety factors, so the result does not often make sense for the society. For instance; safety must be demonstrated for the soil organisms under the facade in a very restricted soil compartment of 10 cm. Ecotoxicological studies must be carried out on earthworm, soil microflora and the growth of plants. The lowest concentration from these tests is then divided by the safety factor 1000 to derive a safe level called PNEC (Predicted No Effect Concentration). The leaching studies must demonstrate that the soil organisms cannot be exposed to higher concentration than the PNEC during the service life of the coating. It is not considered that earthworm can move out the 10 cm compartment, or simply that the house owner will anyway lawn his garden or have other human type activities. Other requested risk assessments make more sense, i.e. the protection of groundwater and surface waters. For the latter, tests are requested proving the safety of a substance that reaches a river, after leaching out of a facade coatings to a sealed surface and going through the sewage system. This highlights the importance of running good & relevant biocide leaching studies.

A sub group of the Decorative coatings Technical Committee discussed the issue with biocide suppliers. It was agreed that the issue is important and still open. The biocide suppliers do not have yet the data available to support the CEPE coatings and need CEPE’s input. The first agreed action is for CEPE to identify representative formulations covering most of the EU market for facade coatings including wood stains. The laboratory studies that will be run for the CPR will be done using biocide actives. Biocide suppliers will be asked to run new semi-field leaching studies. The objectives will be to build a good case to identify the worst case formulations in terms of leaching behaviour, and to try correlating laboratory studies with semi-field studies. This will help CEPE to continue using biocides for outdoor coatings long term and reduce the costs for biocide suppliers by limiting the studies necessary for their product authorization under the BPR.

Cobalt driers

Cobalt driers dossiers were submitted for REACH registration in December 2010 with no classification as carcinogen, mutagen or reprotoxic substances due to data gaps. Included in the dossier
were proposals, i.e. test for their reprotoxicity, to fill these data gaps. Such tests need approval by ECHA and Member States.

The latest information CEPE received on the status of this:

• The Cobalt Reach Consortium has held a meeting in June 2013 with ECHA in which the test protocol foreseen for the reprotoxicity test were discussed.

• If approved it may take maximum another year until outcomes become available.

• If not approved the Consortium has to come with a classification via ‘read across’.

Meanwhile, CEPE recommends to seek replacements for Cobalt driers.

MEKO

Another substance that may find problems in its use is Methyl Ethyl Ket-Oxime, used as anti-skinning agent in Airdrying Solvent Based Alkyds. For applications where no personal protection equipment may be prescribed no safe use can be guaranteed. It would have dramatic effects on the solvent based alkyds for consumers. An ad-hoc joint industry group has been formed with the alkyd suppliers and the MEKO manufacturers. The aim is to collect socio-economic data and meaningful argumentation on the solvent-based alkyd market to motivate a postponement of the enforcement of the MEKO exposure limits that cannot be met.

Sustainability

Decorative Coatings Sustainability Sub-Committee

The Decorative Coatings Sector Group established a dedicated committee for sustainability in 2011. This committee has ensured sector specific input to the project for collecting life cycle data such as the main raw materials and paint manufacturing (see earlier in this CEPE annual review). This committee has been reactivated and will take a closer look at communicating sustainability information to the various deco paint users (consumers, professional painters, architects, green building operators etc.) depending on their knowledge in sustainability and their information needs. The committee will also start addressing what happens after the paint factory gate, like transport, application & use phase or end of life.

Sustainability claims, Ecolabel

Since 2011, the Decorative coatings Technical Committee has been involved in the revision of the European Ecolabel for paints and varnishes. CEPE’s strong relationship with the revising team from the European Commission allows the Industry to express its concerns for criteria in new areas (indoor air quality, nanomaterials, end of life), and to improve existing criteria from an environmental perspective (lowering of VOC limits, tighter restriction of hazardous substances), without jeopardizing the viability of the label.

Bio-based materials

2012 was the start of a closer monitoring of bio-based activities. Bio-based materials are in use in the paint industry, e.g vegetable oil based alkyd resins. More raw materials could become bio-based in the future (solvents, binders etc.). CEPE has members in the CEN TC 411 working groups on bio-solvents, bio-content and claims of bio-based materials. CEPE is also engaged in discussions with the European Commission regarding the bio-economy.
Artists’ Colours (AC) is a small but commercially significant sector of CEPE. Its products are subject to many of the same requirements as those in other sectors, for example on hazard communication and transport, but face some specific issues as a result of their use, composition or sales form. For example, the very small package size of many AC products makes it important for CEPE to maintain its involvement both in adaptations to the CLP (Classification, Labelling and Packaging of substances and mixtures) Regulation (labelling exemptions) and in UN GHS (Globally Harmonised System) guidance on arranging labels.

European Union regulations impact on key ingredients
REACH Annex XVII includes restrictions on the marketing and use of certain substances of concern, which for mainly historical reasons feature in high-end AC ranges. In recent months CEPE has had important dialogue with authorities to defend the small remaining use of ‘white lead’ (lead carbonate), and - in conjunction with pigment producers - to attempt to avert a proposed restriction on cadmium in artists’ colours, by demonstrating a lack of need or proportionality.

The new Biocidal Products Regulation (see separate article) will affect many AC products containing preservatives, being “treated articles” within the meaning of the regulation. From 1 September 2013 new rules on contained biocides and product labelling (if required) must be observed; CEPE’s guidance on treated articles and its new Task Force for users of biocides will be important for AC members as well as others.

Safe products for children
Several CEPE sectors are affected by the provisions of the Toy Safety Directive (TSD) 2009/48/EC, but only AC products are themselves marketed as toys, for example children’s finger paints. The new chemical safety requirements became applicable on 20 July 2013, by which time some migration limits had already been revised; these requirements are supported by updated harmonized standards of the series EN 71. CEPE monitors and participates in consultations on revision of migration limits, and has members active in the standards committees developing and improving the methods in EN 71. In future CEPE will continue to help members by collecting reference data on enforcement opinions (classification as a toy or not) and issues/best practices in conformity assessment.

CEPE’s ongoing representation in ACMI (the Art & Creative Materials Institute, Inc.) is valuable in helping members to comply with requirements and retailers’ demands for testing and certification in North America, particularly for children’s products. International harmonization issues, such as GHS classification and labelling, will be discussed by the AC sector in future to help facilitate exports by members.

At its Annual Meeting on 13-14 May 2013 in Antwerp, the AC Sector Group agreed on the implementation process for its Environmental Responsibility Code and supporting self-assessment questionnaire. Development of a communication package on the importance of art in education was also agreed, for use with key stakeholder audiences including parents, schools and politicians. Last but not least, CEPE committed to review how AC meetings could be planned more effectively to better meet the needs of members in future.
MARINE COATINGS

Marine coatings are used on ships of different sizes and different categories and their specificities depend on their location 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. The International Maritime Organization (IMO) implementation of Performance Standards for Protective Coatings (PSPC) still requires the attention of the group. Since PSPC came into force in 2008 Class Societies have issued guidelines to yards and paint suppliers that may differ between them. This has added considerable burden on suppliers of marine coatings. Hence the group has had activities around using the mutual recognition principle and met DG MOVE. The EU Commission wants harmonization and believes that this would be best achieved under the Marine Equipment Directive. Some work on harmonization has been done by Class societies but not on coatings at present.

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.

The antifouling group combines coating manufacturers with biocide suppliers and has been intensively involved in activities on the defence of biocide active substances and products under the European Biocide legislation. After two years of preparation, the active substance dossiers were submitted in 2006 and are still under review by the competent authorities. This delay in the review is not limited to anti-fouling actives but to all biocide active substances. Indeed, this legislation is new and extremely difficult. Member State experts who participate in the review often do not understand the businesses and are allowed to ask any question they like bringing continuous uncertainties to the process (see the biocide section for more details). With the implementation of the BPR the existing review of active substances will continue but must be accelerated. Anti-fouling substances are going to be prioritized and some are up for discussion by end 2013 while all pending issues have not yet been concluded at EU level. Although it can be expected that some active substances will pass the review, many more issues are expected later on at the product authorization stage. Issues like cumulative risk assessment, mixture toxicity and acceptability of risk mitigation measures or the use of different exposure scenarios will still be raised by national authorities who may individually decide on the acceptance of anti-fouling products. The group decided that it is time to raise the overall issue of protection goal and future availability of anti-fouling paints at a higher political level.

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.
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 since 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.

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) and in the production of guidance documents such as for solvent free coatings or on VOC determination. On the sustainability side, the group is engaged in a discussion on further working on LCA calculations.

Sustainability
With the availability of Life Cycle data on the paint formulations the Sector Group has agreed to do a Life Cycle Analysis of two protective coating specifications that are typical for a steel bridge.
During this year, one of the Intumescent Coatings Technical Committee’s key objectives came closer to fruition, with the publication by CEN of a Public Enquiry Draft of the intumescent coatings product standard (prEN 16623). This standard, which covers the performance testing, specification, application, inspection and maintenance of intumescent coatings, is in the responsibility of Working Group WG13 in CEN/TC139, Paints and Varnishes. Members of the Committee actively participate as national representatives.

A further key objective made major progress during the year. Initial contacts with 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, developed significantly. Subsequent developments this year have included co-operative and joint industry activities with European Association of Passive Fire Protection (EAPFP), who have similar ambitions for other passive fire protection products; progress meetings with the Commission and its expert groups; and active participation in a CEN working group on the drafting of mandates; preparation of an industry note for use at a Member State level to brief national experts on the Commission’s consultative committee, which considers mandate proposals.

Substantial progress was made this year on a Committee initiative on preparation of a best practice guide for applicators of intumescent coatings, which draws on existing national guidance and industry advice and recommendations. The aim is the publication of guidance which provides across Europe a uniform and consistent set of application and operational procedures for intumescent coatings. A working group has been set up, comprising representatives from CEPE, along with EAPFP and EAIPC (both representing applicator companies), which aims to complete the task by spring 2014.

Amongst other activities, this CEPE committee

• continues discussions with the Dutch authorities on the inappropriateness of a proposed arrangement that conflicts with European agreements use only of the European testing standard EN 13381-8;
• has continued to press the European Commission to publish the amendment to the Decision on fire standards to formally recognise EN 13381-8;
• has improved relationships with EOTA (responsible for the management of the current European technical assessments process) following a valuable clearing the air meeting;
• prepared a list of certification bodies and testing houses around Europe, to contact on relevant initiatives and topics;
• has actively participated in the revision of the intumescent coatings testing standard, EN 13381-8, and in the development of standards for intumescent coatings applied to other steel based elements used in construction;
• prepared a briefing note and presentation to the Protective Coatings Sector Group on the pros and cons of third party certification of products;
• has been invited to provide industry contributions to a project initiated by the German notified body on appropriate conditions for VOC emission testing of intumescent coatings in respect of indoor air quality.
EU SECTOR GROUPS
AND THEIR CHAIRMEN

Industrial Wood Coatings
Vacant

Can Coatings
Ezio Braggio
VP Packaging
Valspar EMEA, Bubikon, Switzerland

Coil Coatings
Bengt Ingman
Becker Industrial Coatings AB, Arlandastad, Sweden

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
PPG Protective & Marine Coatings,
Amsterdam, Netherlands

Printing inks (EuPIA)
Thomas Hensel
CEO, MHM Holding, Munich, Germany

Vehicle Refinishing Coatings
Luc Turkenburg
Regulatory Affairs Manager
AkzoNobel, Car Refinishes BV, Sassenheim, The Netherlands
EUROPEAN REPRESENTATION OF INTERESTS

The CEPE Board members after the General Assembly 2013

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.

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

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 Polifar in Poland, then as President of the French affiliate of the Sigma-Kalon 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.

Eva Müller
Eva Müller was born in Leverkusen, Germany, in 1959. She studied business administration at the University of Cologne. Eva Müller joined BASF in 2002 and was employed at BASF IT Services Switzerland as Director of Strategy, Mergers & Acquisitions and Controlling before she was appointed Director of Planning and Controlling in Global Procurement at BASF SE, Ludwigshafen, in 2005.

Armódios St Yannidis
Armódios 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 Vitek. 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 Prodís SA, a company active in the chemical raw material market for cosmetics and detergents. Armódios 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.

Since May 1, 2011, she has been member of the Management Board at BASF Coatings GmbH, Munster. Her current responsibilities comprise HR, IT, F+A, Supply Chain Management, Health, Safety and Environment. Before joining BASF, she held several management positions with Digital Equipment GmbH, ROC GmbH - Metronet GmbH, Informix GmbH, T-Systems IST GmbH. From 2007, Eva Müller, as Vice President of BASF SE, chaired the board of Wissensfabrik - Unternehmen für Deutschland e.V., an open platform for companies, educational institutions and initiatives promoting education and entrepreneurial spirit. Since May 25, 2011 she is a member of the Board of the German Paint and Ink Association.
Dave Wright
Since May 2009, Managing Director, Sherwin-Williams Product Finishes, UK & Ireland Industrial Finishes for wood, metal and plastics. He is a Chartered Chemical Engineer (B.Eng, M.Eng), graduating from the University of Leeds in 1987. He worked for Courtaulds for 14 years before joining Arch Chemicals in 2001. Apart from 2 years when he took part in a MBO of the Hickson & Welch organics business, he continued to work for Arch Chemicals until 2010 when the Coatings Division was acquired by Sherwin-Williams. Since May 2010, Board Member, British Coatings Federation and has previously served on committees for the UK Department of Trade & Industry and as a board member for a sector group of the Chemicals Industries Association.

Hubert Culik,
Comm. Engineer has an Education as Engineer in technical Chemistry. He is employed since 1965 at Rembrandtin Lack in Vienna, Austria, where he is CEO since 2005. Since 2007 he is also co-Managing Director of Christ Lacke in Linz, Austria. In 1998, he received the Silver Honour Medal of the Austrian Republic for special duty. He is Chairman of the ONORM Committee FN 211 and Austrian representative in CEN TC 226. He feels very concerned about his involvement as deputy representative in the paint & coatings trade association. He is co-author of the Austrian “Lackfibel” (Edited in 30,000 copies).

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.

Erikki 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, Erikki Järvinen has been Vice Chairman of the Finnish national organization. During the last years, Erikki has repeatedly given presentations at CEPE’s conferences.
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.

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.

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. This year, Marlies van Wijhe gained recognition as “Businesswoman of the year 2010”.

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.

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.

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 the past over 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.