Canadian Paint and Coatings Association

Association canadienne de l'industrie de la peinture et du revêtement

CPCA INSIGHT

GUIDE AND DIRECTORY

THE CANADIAN PAINT AND COATINGS INDUSTRY

VOICE, VISION AND VALUE

2015

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CPCA INSIGHT

2015

GUIDE AND DIRECTORY

FEATURE ARTICLES

CANADIAN PAINT AND COATINGS ASSOCIATION

ASSOCIATION CANADIENNE DE L'INDUSTRIE DE LA PEINTURE ET DU REVÊTEMENT

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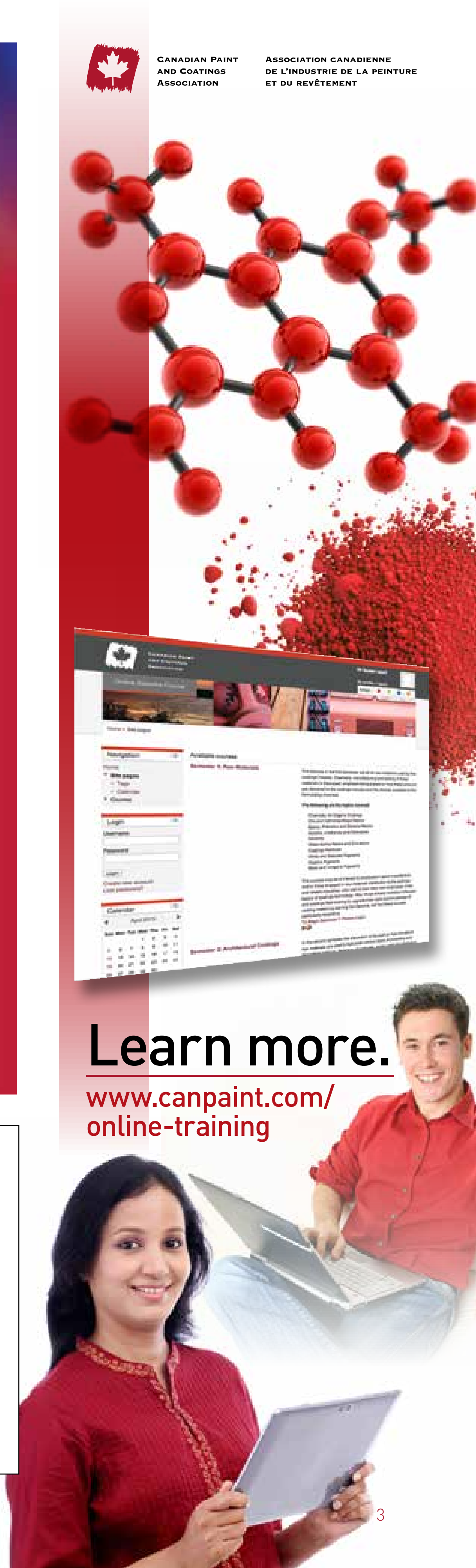


ABOUT CPCA
FOCUSED ON RESULTS

NATIONAL VOICE OF THE INDUSTRY

Since 1913, the Canadian Paint and Coatings Association (CPCA) has represented Canada's major paint and coatings manufacturers, and their industry suppliers, in three primary product categories: architectural paints, industrial finishes and automotive coatings. The industry has 261 paint manufacturing establishments in Canada, which translates into annual retail sales valued at more than $10 billion and employs directly and indirectly 31,800 employees. CPCA's work addresses issues related to all segments: decorative, automotive Original Equipment Manufacturers (OEM), transportation coatings, wood finishes, powder coatings, coil coatings, packaging finishes, general industrial finishes, automotive refinish, industrial and marine.

CPCA advocates for the ongoing stability of the entire paint and coatings industry in Canada by:

- working at all levels of government on legislation and regulations very early in the development stage;
- ensuring members are fully aware of existing and future regulatory compliance requirements;
- providing timely research and information for members on industry-related trends impacting the sector;
- training and other education programs and products to help members address a number of important critical issues; and
- enhancing stakeholder and public awareness of the industry's important contributions with respect to the products used in every facet of the economy, and the important role they play in achieving sustainability.

MISSION To provide value for members by collaborating with governments and industry stakeholders in the best interests of the public, the environment and a sustainable industry.

VISION CPCA is the voice of the entire paint and coatings industry in Canada and is recognized nationally and internationally for its leadership on responsible corporate stewardship and sustainability.

VALUES

- **Integrity and accountability** related to all advocacy efforts;
- Sound scientific research and a **fact-based approach** on sustainability matters;
- **Collaboration** over confrontation for consultations on behalf of members;
- **Responsiveness** to the needs of the membership to ensure inclusion of all;
- Adherence to anti-trust policies to **safeguard proprietary information**; and
- Development of **partnerships** to advance issues on behalf of members.

TIM VOGEL
Cloverdale Paint Inc.
(Chair, CPCA Board)

MESSAGE FROM THE **CHAIR**

DELIVERING RESULTS FOR THE PAINT INDUSTRY

As a longstanding member of the board I know that the association has a fully engaged board of directors who are committed to helping shape the future of the coatings industry in Canada. We are fortunate to have members who are also committed to ensuring the industry remains on a sound footing with respect to often challenging, but necessary, regulatory requirements under which we must all operate. All coatings companies in Canada must comply with regulations imposed on them by the three levels of government. CPCA's work ensures these regulations are evidence-based and provide a level playing field for all. I would also like to single out the work done by our technical committee members who represent the interests of our membership and indeed all of industry.

It is clear to me that the many issues we face in Canada would not be fully addressed without a united front provided by a professional association such as CPCA. This has been the case for more than 100 years with CPCA working to help sustain a vibrant and growing industry. I fully believe that such work is now more important than ever as governments and the public continue to raise the bar on sustainability initiatives to protect the environment and the health of Canadians. In effect, CPCA's work ensures that Canadian paint and coatings companies continue to have a "social licence" to operate their businesses in their communities.

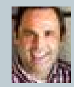
The association represents the relevant issues for our industry with an active board, strong committees and dedicated staff. It helps raise the overall awareness of our industry and deals with important matters on a daily basis. CPCA provides important facts-based information to members, governments, stakeholders and the general public. I am fully convinced that if the association did not perform such a role it would not be done in a cohesive and efficient manner. Furthermore, it would cost our companies a great deal more to do the same work individually and convey our key messages regularly and effectively.

We operate in challenging times — in a busy business world — with fast-paced technological changes and increased regulatory oversight by governments. In addition to demands for enhanced sustainability, our customers demand enhanced performance from their products and, of course, all at the best possible price. Those demands drive new technological innovation, which in turn delivers improved products with better results for our customers. Individually, companies need to face the challenges directly when running their business, but it is helpful when we can work within an association like CPCA on common issues and together achieve positive results. CPCA has performed well in this role and I am sure it would be a different world for our industry had it been otherwise.

I look forward to working with the board, staff and all members as we continue to deliver for the Canadian paint and coatings industry.

TIM VOGEL
CLOVERDALE PAINT INC.
CHAIR

BOARD OF DIRECTORS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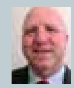
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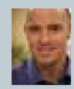
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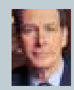
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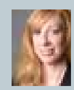
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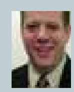
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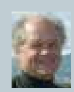
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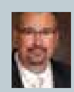
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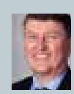
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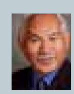
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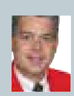
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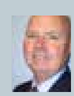
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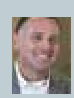
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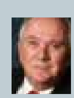
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GETTING THE JOB DONE

This is the first annual edition of ***CPCA INSIGHT Guide and Directory.*** With most things delivered via electronic media these days, this will be the one printed publication for the association. It will serve multiple purposes including annual reporting on the work of the association and provide a look at the state of the industry generally in Canada. It will also address some of the current and ongoing issues faced by the industry with several short articles highlighting current activities and trends. Finally, and most importantly, it will serve as a directory of CPCA members, board of directors and committees — all contributing collectively to the overall success of the association. ***CPCA INSIGHT*** provides a snapshot of the association's work and a window onto the Canadian coatings industry.

As you will see throughout the publication, CPCA continues working on many fronts on behalf of the Canadian paint and coatings industry. There continues to be a strong focus on developing regulations that heavily impact the sector. The federal Chemicals Management Plan remains a large and consuming focus for the association. CPCA's work has delivered results for the sector by helping to alleviate the regulatory burden on industry and ensure that key substances can continue to be used in product formulations. There is also ongoing work on the paint stewardship file to build on the success of recycling programs in Canada with approximately one kilogram of paint recovered for every Canadian in 2014. Also in 2014, significant effort was required to establish a new program operator for post-consumer paint in Canada's largest province with 10,000 tons of post-consumer paint handled each year. Product Care will soon be installed as the new program operator for post-consumer paint in Ontario as per the longstanding wishes of CPCA's membership. There was also a strong effort made this past year to convey key messages on the proposed *Waste Reduction Act* in Ontario and advocate for the principles necessary for an appropriate legislative framework in the future. Key among those principles is the recognition that manufacturers are the regulated producers, or stewards, and must therefore have a strong voice in the development of regulations under which they must ultimately operate and for which they must pay. Ontario will be introducing new waste reduction legislation in 2015.

Regulatory alignment with other countries remains a primary focus of the association, especially the harmonization of regulations with our largest trading partner, the United States. This effort continues moving forward via the joint Canada-U.S. Regulatory Cooperation Council (RCC), which saw the conclusion of consultations on the long-standing goal to align regulations of both countries with respect to the Globally Harmonized System for Chemicals in the Workplace (GHS). This has now been done and it will be fully transitioned in the coming months, followed by a two-year conversion period for suppliers and manufacturers of mixtures, ending on May 31, 2017. It will further enhance the ongoing competitiveness of the industry while ensuring the safety of workers. Among other things, CPCA was instrumental in providing valuable economic impact data to the federal government, which helped advance the final approval of the new regulations.

This past year we also saw the federal government's continued confidence in the Canadian coatings industry with the precedent-setting approval of a voluntary Code of Practice for 2-Butanone oxime, or MEKO, a substance used

primarily in paint and coatings products. It was the first time a Code of Practice was used as a risk management tool for a consumer product in Canada. There will likely be more voluntary codes in lieu of regulations for the industry in 2015. Such a voluntary instrument is less costly than a regulation for our members, while still achieving important sustainability objectives.

Working in concert with allied associations, such as the Canadian Manufacturing Coalition, CPCA continued its advocacy with respect to the persistent challenges for Canadian manufacturing. Federal and provincial governments are beginning to understand that if jobs are to be sustained and created in Canada we must have a reasonable tax regime and a positive economic climate for the manufacturing sector.

The association will continue working on all these matters, while adding new value-added programs for members in the area of skills development, innovation and research, sustainability, and corporate social responsibility. These efforts will highlight and support the impressive work already done by our members on these matters. Staying focused while paying close attention to available resources has been the key to CPCA's success over the past three years. The association will continue to maintain a focus on a clear set of strategic goals as contained in the association's new three-year strategic plan.

GARY LEROUX
PRESIDENT & CEO

Canadian Paint and Coatings Association

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A COLOURFUL HISTORY

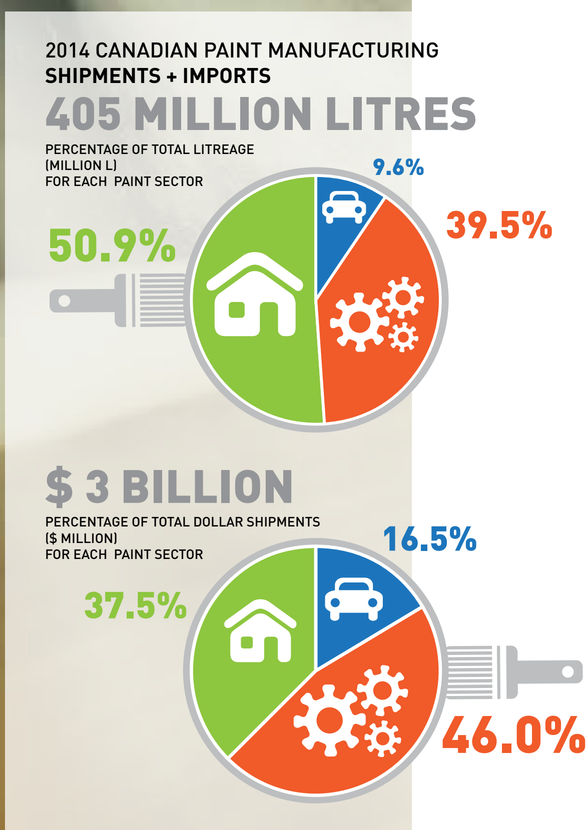
The Canadian Paint and Coatings Association (CPCA) got its start in 1913 as the **Canadian Paint, Oil and Varnish Association**. Achievements of the fledgling group between 1913 and 1920 included adoption of standard-size paint containers and the establishment of a committee to deal with government on all matters affecting the industry. The association also cemented an enduring relationship with their American counterpart and that relationship continues today with the American Coatings Association. By 1935, the industry was beginning the long climb out of the Depression. In 1941, the association changed its name to the **Canadian Paint, Varnish and Lacquer Association** and it was officially recognized as the channel for communication between industry and government. Another name change – the **Canadian Paint Manufacturers Association** – took place in 1966 with a French equivalent to reflect the truly national scope of the association. The 1960s and early 1970s brought increasing government activity in areas that greatly impacted the industry and its products.

A name change was instituted in 1980 to better reflect the scope of the association's work and the **Canadian Paint and Coatings Association** conveyed the fact that the organization truly represented the entire industry in Canada. Throughout the early 1980s, more focus was placed on better communication with members, direct programs and services for member companies and addressing the specific needs of different sectors within the industry. In the 1990s, federal government legislation and regulations related to the environment re-emerged as the public increased demands for sustainability under the *Canadian Environmental Protection Act*.

Today, the association is well served by member volunteers on its board and technical committees. One thing has not changed in more than 100 years – the industry needs a strong voice to represent its interests and that voice is stronger when industry works together. That has truly been CPCA's legacy.

THE CANADIAN PAINT INDUSTRY IN 2014

Canada is well positioned in the coatings market with one of the highest standards of living in the world placing the country among the leaders in per capita coatings consumption rates. Canada's industrial output remains relatively high as a percentage of GDP and civil construction is forecasted to outpace that of the United States in the near term. Automotive production is relatively stable and should remain so for the foreseeable future, with continued government support for automotive manufacturing. Management consultants Orr & Boss have recognized Canada's paint and coatings sector as a "mature, slow growing industry," which means that it is stable when compared with other countries, and shares some of the same challenges, including strict environmental regulations and increased demands for product stewardship and sustainability.



The value of the Canadian paint industry's manufactured shipments reached almost $1.7 billion in 2014, rising 2.8 percent after two years of decline. Similarly, the total volume of manufactured paint shipments reached 264 million litres, a 1.3 percent increase following two years of decline. Meanwhile, paint imports jumped significantly for the year with a 7.7 percent increase in value and 4.8 percent in volume, valued at $1.3 billion.

When considering all paint sold in Canada (manufactured and imported), architectural paint continued to dominate, generating 50 percent of the total volume of sales in 2014 (405 million litres). However, the industrial paint sector outperformed the architectural sector with respect to the value of wholesale shipments and imports with 46 percent of the total share of $3 billion. The automotive sector, which reflects the performance of the automotive refinish and OEM paint segment, maintained a small share of 16 percent of the total value and a smaller share of the total volume sold in Canada at 9 percent.

Sales of waterborne paint products in Canada, dominating the architectural sector, represented more than 94 percent of the products sold in 2014. This compares to 78 percent in 2006, before the Canadian *Volatile Organic Compound (VOC) Concentration Limits for Architectural Products Regulations* were published — and after huge voluntary efforts by industry encouraging consumers to move to waterborne paint. In the automotive refinish sector, sales of waterborne basecoat paint accounted for as much as 80 percent of the total volume of paint used in Canadian autobody repair shops. **In 2007, prior to the publication of the *Volatile Organic Compound (VOC) Concentration Limits for Automotive Refinishing Products Regulations* solvent-borne products accounted for 93 percent of the total volume of sales. This is truly a major environmental success story and clear evidence of what can be achieved when industry can work collaboratively with government.** ■

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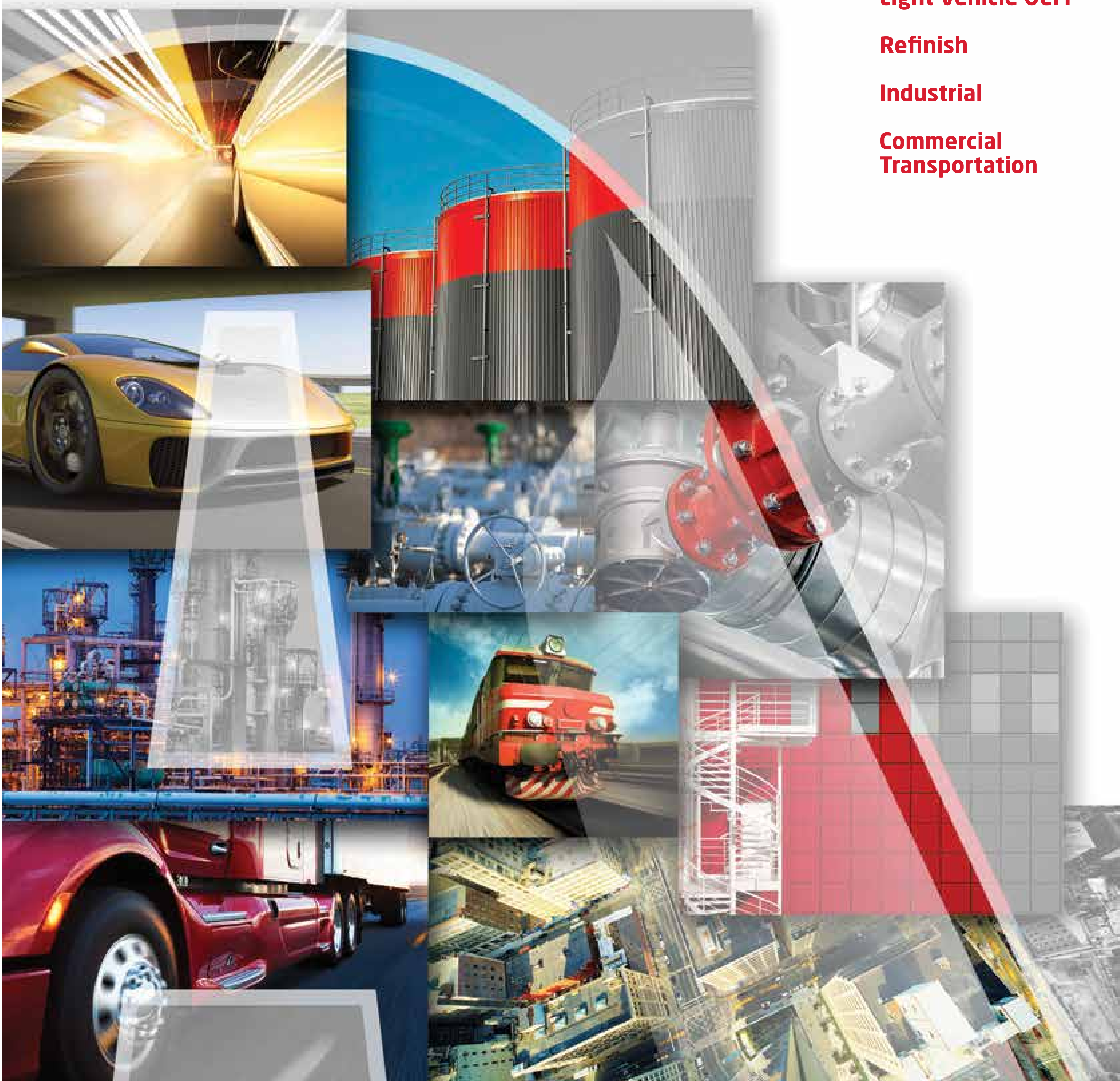


BUSINESS IMPACT OF NEW SMART COATINGS

LAWRENCE GASMAN
PRINCIPAL ANALYST, NANOMARKETS LC

NanoMarkets (n-tech Research) recently published a study of the smart coatings market that predicts a great leap forward in "intelligence" — enough to drive the market for smart coatings from an approximately $0.6 billion market today to a $5.8 billion market by 2020.

R&D programs are reaching a point where they will deliver higher-performing and longer-lived smart coatings, which, in turn, will open up larger addressable markets for these products. Next-generation smart coatings will enable coatings manufacturers to shift their emphasis from peddling commodities to developing libraries of protectable intellectual property (IP) built around smart coatings. Both the larger markets and the proprietary nature of future smart coatings products spell bigger profit margins for coatings suppliers. The smart coatings sector is highly diverse, but the look and feel of it can be illustrated by examining a few key market segments.

SELF-HEALING COATINGS: **FASTER AND BIGGER**

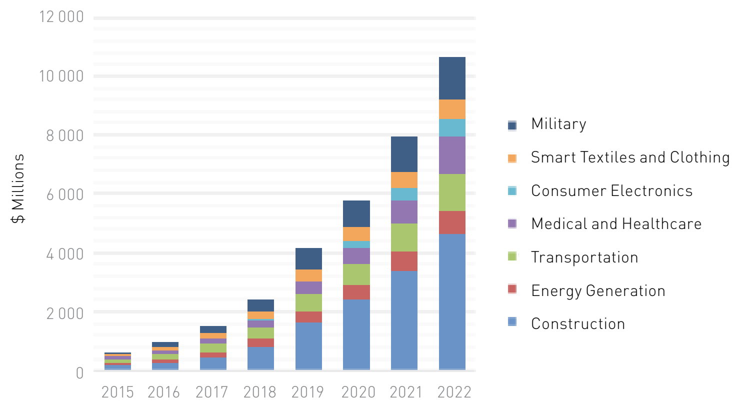
Self-healing coatings provide a good example of where smart coatings are headed. Today's "self-healing" coatings are often little more than anti-scratch coatings. But there will be a major improvement in terms of the type and size of damage that self-heal coatings can handle. The repair will also happen faster — today some self-healing coatings can take many hours to make a repair. In the future, repairs will take minutes. Two applications stand out in terms of potential:

- There is a lot of development activity in the self-healing coatings for the concrete sector. If this results in viable commercial products, they will find a ready market, funded by the billions of dollars that get spent on building repair; and
- There are already many novel approaches to protecting mobile electronics — from unbreakable flexible displays to Apple's attempts to protect phones with sapphire glass. The smartphone/tablet market is huge — about two billion units shipped annually — so it seems inevitable that smart coatings makers will design coatings especially for this market segment.

SELF-CLEANING AND ANTIMICROBIAL COATINGS: **NOVEL TECHNOLOGIES**

The performance of self-cleaning coatings has been modest — they don't clean that well or last well. Self-cleaning glass, for example, is often based on nanocrystalline TiO_2, which has challenges with regard to its robustness and optical transparency. However, new hydrophilic, hydrophobic, oleophobic and amphiphobic coatings are being developed. A couple of technologies with great potential for self-cleaning are 1) nanotechnological approaches to patterned hydrophobic surfaces, and 2) "super-hydrophobic coatings." Meanwhile, whereas in the past "smart" antimicrobials have tended to mean only that they have a built-in time-release mechanism, today there is a shift towards the use of self-assembly and hydrophilic technology for smart antimicrobial coatings.

Eight-year Revenue Forecast for Smart Coatings by Industry



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SELF-ASSEMBLING AND SELF-STRATIFYING COATINGS: **SAVING MONEY IN MANUFACTURING APPLICATIONS**

Advanced self-assembling coatings can provide reduction in the cost and ease of coating processes. Self-stratifying coatings that are able to form multilayer films from a single coating system are already gaining prominence in the automobile industry where labour and material costs involved in the application of a second coating on cars have been an issue for some time.

SMART COATINGS AND THE INTERNET-OF-THINGS: **NEW STORIES**

Widely respected NanoMarkets also believes that smart coatings will have an important role to play in the much touted Internet-of-Things (IoT). For example, a smart coating that is also a sensor would likely be a more cost-effective way to create a wide-area sensing panel than a large array of sensing devices. The research group would not be surprised if smart coatings turn out to be significantly less expensive than sensor arrays.

Indeed, the industry is beginning to see the melding of smart coatings and the IoT. Smart coatings with embedded sensors for tires that signal the driver when the tires begin to lose traction is one example. There is also development work on optical fibre sensors with fluorescent coatings that can indicate paint degradation and prevent microbiologically influenced corrosion.

With all these changes in terms of both technology and market, NanoMarkets believes that coatings firms will have to rethink marketing strategies to suit the newly developed intelligence of next-generation smart coatings. ■

> **"BOTH THE LARGER MARKETS AND THE PROPRIETARY NATURE OF FUTURE SMART COATINGS PRODUCTS SPELL BIGGER PROFIT MARGINS FOR COATING SUPPLIERS."**

COMBATTING CORROSION

(REPRINTED WITH PERMISSION FROM ASTM STANDARDIZATION NEWS, VOL. 42, NO. 6, COPYRIGHT ASTM INTERNATIONAL)

The evening news may leave many of us feeling war-weary, but one ASTM International technical committee (formerly American Society for Testing and Materials) has been successful in conflict of a different sort. It's a commonplace but epic struggle between the natural and civilized worlds — the fight against metal corrosion. For the past half-century, the weapon of choice of ASTM Committee G01 on Corrosion of Metals has been its nearly 100 standards. They promote research, the collection of engineering data, and methods and tests for detecting, monitoring, measuring and preventing metal corrosion. While some battles have been won, it's a sure bet that committee work will continue for many more years. "Corrosion is a part of life," says Daniel Crabtree, G01 committee chairman and senior project manager, Corrpro Companies Inc., of Birmingham, Alabama. "It's always going to be here."

We all experience everyday corrosion skirmishes with old, rusting garden tools, overzealously cleaned griddles, bicycles that have never seen the inside of a garage and cars that have encountered too much melting snow and road salt. More deadly corrosion disasters can involve the failure of power plants, bridges, buildings, silos, vessels, pipes and other infrastructure. In addition to human loss, corrosion can cause environmental harm, contamination, mechanical damage and deterioration of surface properties, like electrical conductivity.

The costs are staggering. According to Robert Baboian, veteran ASTM member and corrosion consultant, Greenville, Rhode Island, a 1976 study by the National Bureau of Standards (now the National Institute of Standards and Technology) determined that the economic effects of corrosion totaled $70 billion annually. By 2002, the U.S. Highway Administration had bumped that figure to $276 billion. NACE International (formerly the National Association of Corrosion Engineers) estimated that the annual cost of corrosion in the United States in 2013 would significantly exceed that amount. Estimates by reputable organizations have put the annual cost of corrosion at $1 trillion worldwide.

A TACTICAL APPROACH

With a few exceptions, like gold, most metals do not occur naturally. We process them from ores. As soon as they are used in an environment with oxygen (usually from the atmosphere) and an electrolyte (usually water and/or soil), they strive to break down and return to their elemental form. In a spontaneous and electrochemically biased process, metals behave like deteriorating anodes, employing 15 different types of corrosion as allies. Meanwhile, we counterattack by modifying their environment or use alloys. We provide cathodic protection with galvanic anodes (like zinc) that sacrifice themselves to protect underlying metals or protect themselves via electrical current. Or we introduce corrosion inhibitors, like coatings or platings. "The corrosion process is an insidious one, which is often difficult to recognize until extensive deterioration has occurred. In some cases, this leads to catastrophic failure," notes Baboian.

COMMITTING TO COMBAT

As early as 1900, ASTM members were concerned about corrosion. Railroads wanted reliable track. Steel's ability to withstand corrosion versus wrought iron was a popular subject of debate. By mid-century — with increased use of galvanized and stainless steel, plus nonferrous metals like aluminum, nickel and copper — dozens of ASTM subcommittees were formed to consider corrosion. But it was Frances L. LaQue, president of ASTM from

1959 to 1960 and director of marketing at International Nickel Company, who was instrumental in establishing ASTM Committee G01 in 1964. The intent was to reduce duplication of effort, centralize corrosion standards development in one technical committee and acknowledge the growing needs of several industrial sectors.

ESCALATING CASUALTIES

According to Sheldon Dean, Dean Corrosion Technology, Glen Mills, Pennsylvania, by the mid-1960s, the automobile industry was struggling with pitting and peeling chrome bumpers and corroded painted auto body steel where stainless steel was attached to it. The nuclear power industry needed ways to test for stress corrosion cracking. The chemical industry required solutions for localized corrosion at welds in pipelines. The defense industry wanted to test for the alloys' tendency to peel off the surfaces of military aircraft. Additionally, with the expansion of the aluminum industry, standard methods were needed to determine the corrosion resistance of aluminum alloys. NASA has been consumed with addressing this pervasive problem for very expensive equipment used in the space program. With the profusion of industries and applications affected by corrosion, ASTM Committee G01 continued to expand. Today, it has more than 600 members representing 32 countries, and 12 subcommittees with jurisdiction over close to 100 standards used throughout the world.

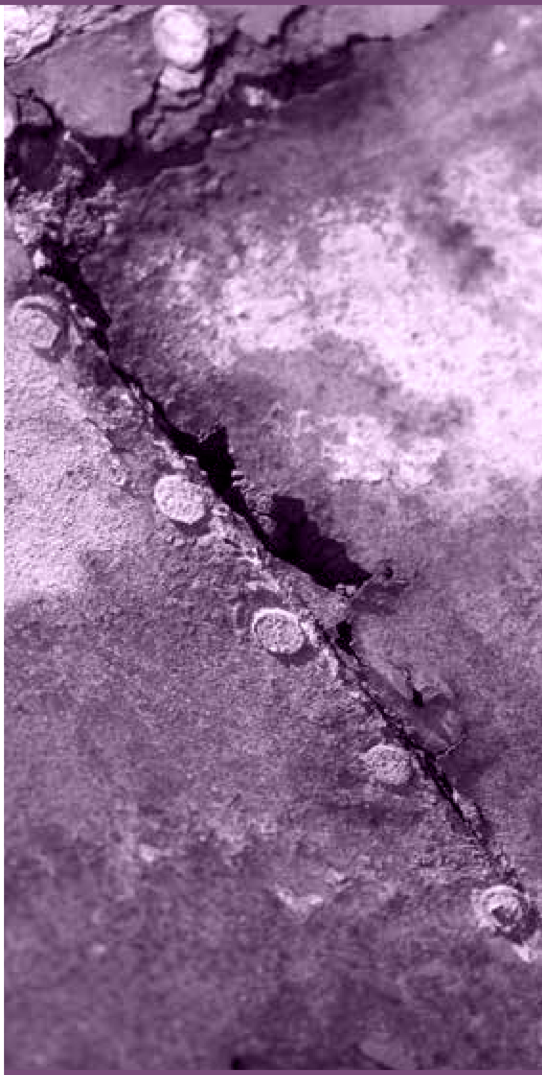
STANDARDS DEVELOPMENT

The committee initially acquired four existing ASTM standards and focused on atmospheric and laboratory tests, plus corrosion in natural water, soils and industrial and high temperature environments. In recent years, it has published more industry-specific standards geared to the development of new alloys and materials systems for specific environments, notes Baboian. G01 standards address localized corrosion; galvanic corrosion; pitting and crevice corrosion; inter-granular corrosion; and electrochemical techniques for corrosion testing and evaluation.

FUTURE STRATEGIES

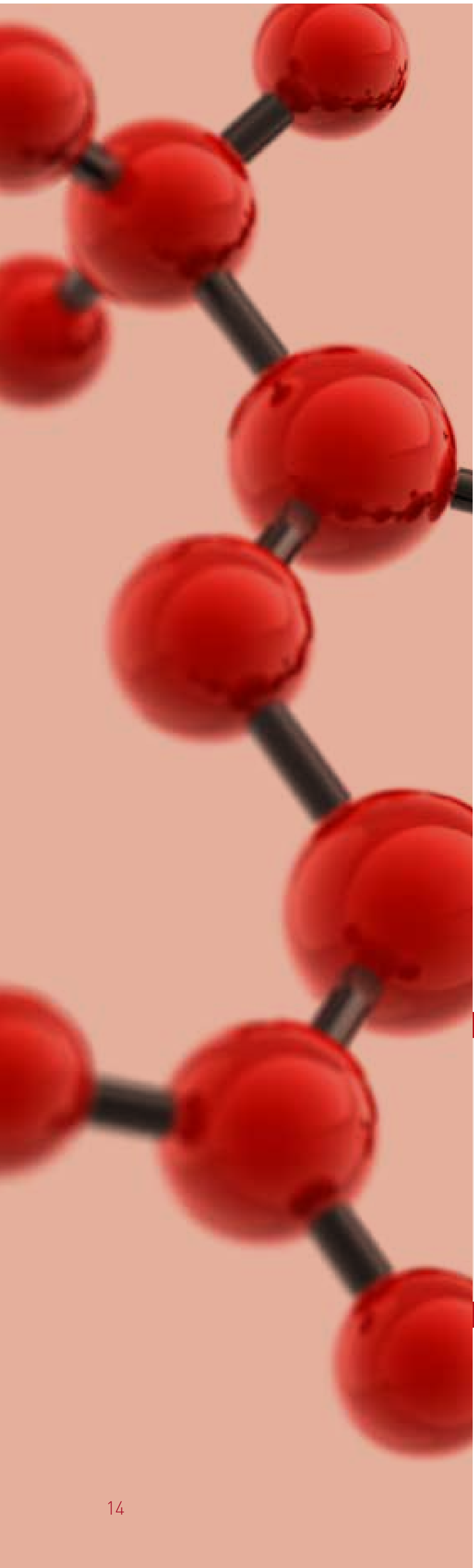
Many more years of work remain for ASTM Committee G01. Existing standards continually require revision to keep up with new materials and technology. And new standards are under development. One is in response to requests from auto, truck and vehicle parts manufacturers, and the U.S. Department of Transportation, for more accurate corrosion testing of calcium chloride and magnesium chloride, de-icers used as alternatives to more common road salt, or sodium chloride. Future standards may address non-metallics, such as carbon and composite materials, or corrosion in electronic products, electric cars, wind generators, solar panels or medical products, including stents and joint replacements.

Dean concurs that "very little in the corrosion field is new. We simply aren't always using the available information to deal with it." That fact remains part of the endless struggle against corrosion. "Corrosion control needs to be addressed up front," says Crabtree. "We've made great strides in educating the public and industry about corrosion and maintaining infrastructure, but we've still got a long way to go." And the development of standards will continue to be an effective and essential strategy. ■



"...CORROSION CAN CAUSE ENVIRONMENTAL HARM, CONTAMINATION, MECHANICAL DAMAGE AND DETERIORATION OF SURFACE PROPERTIES..."

CANADA'S CHEMICALS MANAGEMENT PLAN



AMARDEEP KHOSLA
EXECUTIVE DIRECTOR, INDUSTRY COORDINATING GROUP FOR CEPA

Canada has made considerable progress in assuring chemicals are managed safely as a result of the federal government's Chemicals Management Plan (CMP) and has, in my opinion, been able to establish a sound and reasonable process to achieve significant progress for three main reasons. First, the CMP set clear priorities based on a credible, risk-based approach. Second, manageability and timelines have remained in focus. And third, industry and other stakeholders have consistently been involved to help build a sound scientific basis for the program, and to build awareness that the CMP is a program that works.

A key feature of the CMP, launched in 2006, was to extend Canada's regulatory regime to more comprehensively address existing substances, by focusing on 4,300 of the 23,000 substances in its inventory on the Domestic Substances List (DSL). The 4,300 were identified as "meeting the criteria for further attention" via an initial categorization process that considered aspects of inherent toxicity, the potential for bioaccumulation and persistence and exposure. The remaining 19,000 substances were identified as "not requiring further action at this time." The CMP addresses the 4,300 in five-year phases: CMP-1 launched in 2006 (1,100 substances); and CMP-2 launched in 2011 (1,500 substances). Given the sequential nature of data acquisition, assessment and management, both CMP-1 and CMP-2 currently remain in effect. Discussions have begun on the design of a potential CMP-3.

Of the 2,600 CMP-1 and CMP-2 substances, more than 1,700 have been assessed via individual initiatives. While the details of these initiatives have differed, and sometimes widely so, the underlying assessment approach used throughout has been more unified and remains rooted in credible, risk-based policies and practices. Subsequent risk management steps are being taken, as needed, in consultation with the affected industries and the use of a pragmatic "Best Placed Acts" approach that may result in control actions under the *Canadian Environmental Protection Act* (CEPA) and/or other Acts including the *Food & Drugs Act* and the *Consumer Product Safety Act*.

"CANADA HAS MADE CONSIDERABLE PROGRESS IN ASSURING CHEMICALS ARE MANAGED SAFELY..."

Looking forward, there are several priority issues that remain under the CMP which deserve, in my view, the greatest attention. First, Canada should continue to set clear priorities and to apply tiered approaches to information gathering and assessment that target the areas of main concern. Ideas under consideration to reduce unnecessary work, and to direct the unused resources to where they are needed most, include: additional "rapid-screening" using recent "inventory update" information to identify more substances "not requiring action at this time"; the systematic identification of polymers of low concern; and matching the complexity of a given assessment with the associated level of risk.

Second, Canada should continue to search out and apply international best practices within a weight-of-evidence based risk assessment framework. This will be particularly important as the CMP moves into a relatively less data-rich environment and addresses substances that are more challenging to characterize or group for assessment (e.g., substances with Unknown or Variable Composition and Biological materials or UVCBs). And, those substances that require more extensive use of models, and/or novel data sources and assessment techniques. Third, Canada must continue to improve engagement of the supply chain, both within Canada and with key trading partners. This will pay dividends by improving meaningful data acquisition and, ultimately, compliance.

Progress does not occur in isolation and, looking across the border, there are several opportunities that Canada and the U.S. have seized upon to cooperate on managing chemicals more effectively while also continuing to support their extensive trading relationship. The Canada-United States Regulatory Cooperation Council (RCC) is bringing Health Canada, Environment Canada and the Environmental Protection Agency together to develop a joint process that will allow "companies planning to introduce a new substance in both countries to approach both governments simultaneously" in a process called the *North American Notification Consultation* (Nan-C). This builds on similar work previously done in the OECD context.

The RCC is also bringing the agencies together to consider and identify opportunities to align aspects of their regulatory processes related to assessment approaches and reporting requirements for new uses of chemical substances (i.e., Significant New Activity or SNAc provisions in Canada, and Significant New Use Rules or SNURs in the U.S.). All of these RCC activities have the potential to simplify regulatory compliance, promote innovation and ease cross-border flows of goods.

As a side note, but an important one to consider, is the fact that well before any industry surveys can be launched, CMP typically involves consultation processes that enable companies and sectors to voluntarily provide the government with timely access to the most relevant, available information needed for assessment and/or management of a given substance or group of substances. This includes hazard and exposure data relevant to uses, models and assessment outcomes in other jurisdictions, for example. I believe the Canadian companies and their U.S. counterparts must continue to work closely together to support and benefit from these processes. ■

"...RCC ACTIVITIES HAVE THE POTENTIAL TO SIMPLIFY REGULATORY COMPLIANCE, PROMOTE INNOVATION AND EASE CROSS-BORDER FLOWS OF GOODS."

THE PAINT AND COATINGS INDUSTRY: ON POINT WITH SUSTAINABILITY

GARY LEROUX
CPCA

Since it first came into the vernacular in 1987 at the United Nations with the *Brundtland Environment Commission Report*, sustainability has been the buzzword for the 21st century. It defined sustainable development as "development that meets the needs of the present without compromising the ability of future generations to meet their own needs." It is indeed a worthwhile goal and since then it has been embraced by the corporate world, including the paint and coatings industry.

The International Paint and Printing Ink Council (IPPIC), of which CPCA is a founding member, interprets the broad definition specifically for the global paint and printing ink industries in terms of their impact on Planet, Prosperity and People. IPPIC's sustainability policy notes that the coatings industry has a long history of sustainable practices. It points out that these include: "Protecting and decorating the surfaces of buildings and structures, ships, planes and automobiles, as well as paints and coatings that provide energy efficiency, disease prevention, and 'self-repairing' surface treatments. Other examples include resource recovery, eliminating hazardous emissions, offering products formulated to meet specific requirements, 'life-cycle assessments' to evaluate the relevant environmental impacts that come from preserving and protecting global infrastructure, and worker and community health and safety programs that protect the workforce manufacturing the products and the communities using paints and coatings." The coatings industry has clearly been proactive on many fronts with respect to this definition of sustainability for many years by virtue of the excellent performance and multiple uses of its products.

In addition to these obvious value-added characteristics of coatings, in 1996 IPPIC developed the Coatings Care® program and its best management practices for environmental management, process safety, occupational health and safety, product stewardship, transportation and distribution, and community responsibilities. In addition to regulations, standards and specific environmental initiatives the program serves as a guide for coatings companies around the globe to ensure sustainable business practices remain a key business focus. In addition to these best practices, more recently in Canada we have seen a proliferation of regulations and standards by

"THE COATINGS INDUSTRY HAS CLEARLY BEEN PROACTIVE ON MANY FRONTS WITH RESPECT TO THIS DEFINITION OF SUSTAINABILITY FOR MANY YEARS…"

governments at every level to control the use of chemical inputs for coatings formulations such as the federal government's comprehensive Chemicals Management Plan (CMP) assessing the risk of all chemicals in commerce. These regulations are among some of the toughest in the world and much of CPCA's work involves working with governments to ensure that regulations are evidence-based with respect to a reasonable assessment of risk. That being said, the paint and coatings industry has not wavered from its environmental responsibility and works hard to be in full compliance with regulations.

All of this effort has led to many positive outcomes, such as substantial VOC reductions with low and no-VOC products on the market, and increased use of waterborne paint over solvent-based. More than 90 percent of the architectural products used in Canada are now water-based and 80 percent in the case of autobody repair. As well, more than one kilogram of leftover, post-consumer paint per Canadian was recovered under product stewardship programs in 2014. That is approximately 35 million kilograms per year!

All CPCA member companies pay close attention to sustainability and environmental impacts in some manner and have received international recognition for their achievements. However, it needs to be noted that the achievement of social and environmental objectives can only come if the third pillar of sustainability—economics—is sound. On that front the coatings industry is also on top as it has outperformed all other industries in the chemicals sector over the past four years, averaging a 27 percent return compared with the Standard & Poor's 18 percent. The industry provides good shareholder returns with strong cash flows, and consistent earnings that lead to excellent value creation.

There are other reasons the coatings industry provides worthy investment opportunities. The sector is viewed as part of a strong value chain with predictable cash flow and ROI, good profitability, low capital intensity with significant barriers to entry such as regulations, technology innovations and strong franchise operations. In fact, over the last four years there has been $15 billion in activity from mergers and acquisitions, which included manufacturing (48 percent), distribution (19 percent), and raw material supply (33 percent). Furthermore, coatings companies are well respected for capably running their companies with good returns for investors and a deep understanding of their customers.

The paint and coatings industry doing the right thing, in the right way, for the right reason, helps increase productivity, lower costs, and increase worker safety. This is done while helping customers reduce consumption of resources and minimize exposure and impacts on the environment. In the final analysis, sustainability has proven to be good for business and good for the environment when done the right way. It is here to stay as part of our lexicon and as a critical part of the paint and coatings business. ■

" THE PAINT AND COATINGS INDUSTRY HAS NOT WAVERED FROM ITS ENVIRONMENTAL RESPONSIBILITY AND WORKS HARD TO BE IN FULL COMPLIANCE WITH REGULATIONS."

NEW COST-EFFECTIVE COATINGS FOR ELECTRICITY STORAGE

HEATHER AMOS,
UNIVERSITY OF BRITISH COLUMBIA

University of British Columbia (UBC) researchers have found a new way to make state-of-the-art materials for energy storage using a cheap lamp from the hardware store. The researchers wanted to find a better way to make coatings that can be painted onto surfaces to conduct electricity or convert electricity into hydrogen fuels. Typically these coatings are developed in extreme conditions with expensive tools and materials. But the researchers developed a technique that allows them to use a consumer grade heat lamp to get the same results. A solution is painted onto a surface and once heated up, it transforms into a catalytic coating.

These coatings can be used in a range of technologies, such as flexible electronic devices or to convert electricity into hydrogen fuels. The discovery, published in the new open access journal *Science Advances*, could have implications for clean energy technologies.

"Solar farms and wind turbines don't provide a constant supply of energy," says study co-author Curtis Berlinguette, an associate professor in UBC's Departments of Chemistry and Chemical and Biological Engineering. "Storing electrical energy produced during times of low demand as hydrogen fuels enables that electricity to be used later during peaks of higher demand. The catalyst coatings we can now produce more easily could help make this process cheaper and more efficient."

The researcher's new technique may also help reduce the fabrication costs of making catalyst-coated electrodes in commercial applications.

"The technique is scalable and amenable to large-scale manufacturing," says Danielle Salvatore, a chemical engineering graduate student and the paper's lead author.

"We can create these materials on any surface without an expensive precursor," says Berlinguette, explaining that these findings build on earlier work of using more expensive UV light to create catalytic films.

"THE DISCOVERY... COULD HAVE IMPLICATIONS FOR CLEAN ENERGY TECHNOLOGIES."

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Canadian Paint and Coatings Association

Association canadienne de l'industrie de la peinture et du revêtement

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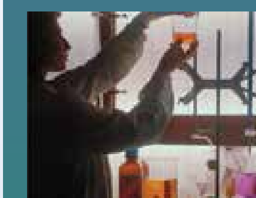

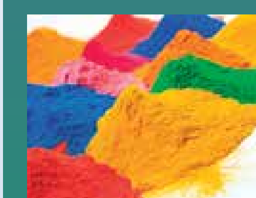

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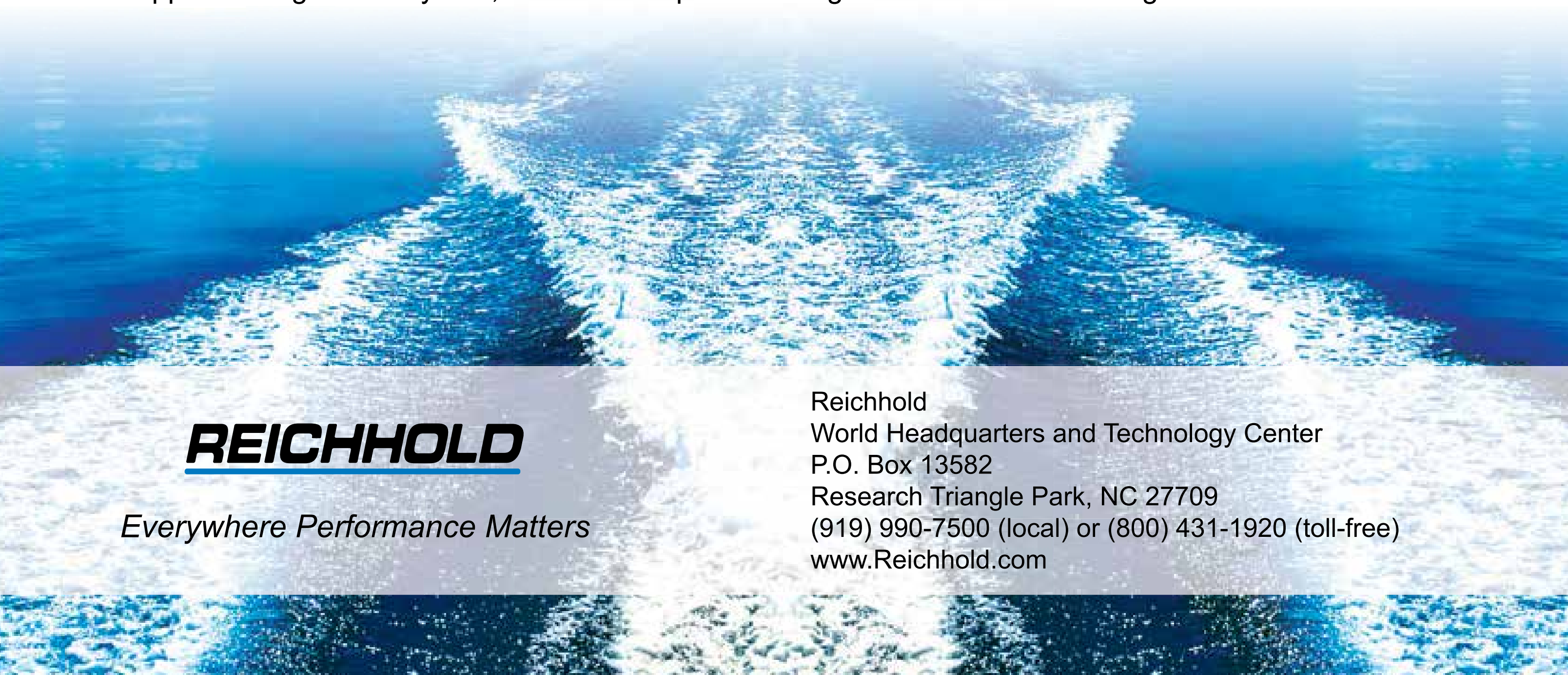
While markets will always ebb and flow, Reichhold's unwavering commitment to developing new and innovative products for the customers and markets we serve will remain constant. We appreciate your support throughout the years, and we anticipate creating a few waves as we surge forward.



CPCA MEMBER PROGRAMS & SERVICES

CPCA continues to deliver value-added programs and services with positive results for its members — with more to come. In 2015, CPCA will be launching four new programs and services to address emerging issues for members. These include: 1) Human Resources and Skills Development, 2) Sustainability Policy and Program, 3) Corporate Social Responsibility (CSR) Program and 4) Innovation and Research. Each of these focuses on addressing an issue identified by the membership and included in the association's recently approved 3-year strategic plan.

CPCA programs and services relieve member companies from having to perform the many tasks assumed by the association, provide a central focus for the critical issues faced by the industry in Canada and allow the industry to speak with one, resounding voice for maximum effect.

GOOD INFORMATION IN, GOOD REGULATIONS OUT

GOVERNMENT RELATIONS & REGULATORY AFFAIRS

GOVERNMENT RELATIONS

CPCA's government relations work takes place on many fronts and at all levels of government: federal, provincial and municipal. Regulatory affairs is supported by two primary committees, Health, Safety and Environment (HSE) and Product Stewardship. These often have sub-committees that address relevant sector issues for industry. Under the HSE, the *Paint and Coatings Working Group* (PCWG) is comprised of CPCA staff and member representatives, as well as key government officials from Health Canada and Environment Canada. PCWG deals with proposed chemicals management regulations well in advance of consultations with other industry associations and stakeholders. This ensures CPCA and its members have the first opportunity for direct input well before the issues are off the ground.

REGULATORY AFFAIRS

The Chemicals Management Plan (CMP) is a huge undertaking for the Canadian government, and is widely considered among the best approaches to chemicals management in the world. While time-consuming and costly for both industry and government, CMP is a response to public demands that companies using chemicals ensure that they are safe and sustainable. If companies are to continue operating in Canada using a wide array of chemicals they must participate in this process.

Initiated in 2006, the CMP will be fully completed by 2020. The federal government's unique science-based screening process focuses on evaluating, assessing and managing the risks associated with nearly 23,000 chemical substances estimated in use by various industries in Canada. To varying degrees, a large subset of these chemicals (4,300) are suspected of being persistent, bioaccumulative or presenting inherent toxicity for the environment and humans.

The federal government will soon proceed with the analysis of phase 3 of the CMP, which in itself involves the screening of 3,500 substances. **The paint sector was identified as one of the main target sectors in Phase 2 and Phase 3, requiring CPCA to work closely with the federal government.** CPCA addressed several proposed risk assessment and management instruments implicated in the paint industry in 2014, such as: Bisphenol A, 2-Butanone Oxime, DEGME, Pigment Red 3, Pigment Red 104, Pigment Yellow 34, TDIs, carbon black, crystalline silica, to name a few. CPCA and its members have worked hard to ensure that risk assessments have minimal repercussions on the chemicals used in the paint industry. Steps include:

- The compilation of sector information for various substances in the CMP Challenge and, more recently, early engagement in the substances groupings initiative that included cobalt-containing compounds, MDIs/MDAs, phthalates, etc., and non-challenge substances such as ethylbenzene and BDTP.
- Data collection efforts on paint usage that has helped the Canadian Government improve its use and interpretation of international exposure scenario documents and related models (e.g., CONSEXPO and WPEM), which can result in the necessary fine-tuning of the government's exposure assessment methodologies to reflect reality.
- The development of specific sector comments for the federal government on the design of surveys prior to their launch to the entire industry (e.g., DSL-IU2, polymer approach, MEKO and ethylbenzene surveys to gather national baseline data).
- CPCA and other industry associations repeatedly sought a new Significant New Activity (SNAc) policy for new uses of chemicals in the paint and coatings industry, with many of the positive elements proposed by industry comprising a new federal policy that is more amenable to industry.
- A successful conclusion of CPCA's lobby for VOC exclusions being granted for 13 substances under Schedule 1 of the *Canadian Environmental Protection Act*, including chemical compounds such as TBAC, Dimethyl Carbonate (DMC) and Propylene Carbonate, which will help member companies meet lower VOC limits imposed by current

science **sustainability**
regulations compliance
evidence partnerships
collaboration **integrity**
responsiveness

regulations. CPCA continues to pursue its request for the exclusion of AMP (1-Propanol 2-amino-2-methyl).

- A formal submission was made to the Regulatory Cooperation Council (RCC), in concert with the American Coatings Association (ACA), on future projects for the next regulatory alignment Action Plan developed jointly by Canada and the United States.

CPCA's work on chemicals management has delivered results for the sector by generally helping to alleviate the regulatory burden on industry and by ensuring that key substances continue to be used in product formulations. The paint sector continues to be significantly implicated in some groupings listed in Phase 2, such as azo pigments, cobalt-containing substances, MDI-MDAs, phthalates, internationally classified substances and more. It is an onerous undertaking and an ongoing preoccupation.

For the upcoming Phase 3 in 2015, CPCA has determined that 25 percent of the 600 polymers and 22 percent of the 2,100 substances listed for assessment are confirmed as being used in paints and coatings. Thus, it is of the utmost importance for all paint manufacturing companies and related suppliers operating in Canada to participate in these discussions and convey a unified position on the most appropriate risk control instruments, including regulations. Phase 3 will have a direct impact on coatings companies operating in Canada and CPCA has a proven track record in successfully minimizing that impact.

One must consider the fact that decisions, which are not aligned with other jurisdictions or lead to negative decisions by the federal government with respect to chemicals used for coatings, can quickly lead to the following negative impacts:

1. North American trade disruptions and difficulties in the management of stocks;
2. the abandonment of products with high penetration in the Canadian marketplace;
3. reformulations required for products with substitutes that are not always cost-effective or available in Canada;
4. extensive testing, re-labelling and special precautions with respect to transportation of goods;
5. unique Canadian restrictions of uses and/or misalignment with other U.S. and international regulatory measures for substances; and
6. the potential of creating a negative image of the paint industry with respect to substances used in paint formulations, including in cases where products and applications may not even be targeted for specific risk control measures.

Industry wants none of these potential impacts to become a reality and alter their respective business plans.

CPCA's regular discussions with governments help clarify perceptions on uses and exposure and properties of the chemicals in question. This work can save companies time and money, thereby providing a significant return on investment for CPCA members and, in turn, allow government officials to make fact-based decisions on the chemicals being reviewed.

SUSTAINABILITY FIRST

SUSTAINABILITY & PRODUCT STEWARDSHIP

The Canadian coatings industry is at the forefront of sustainability and product stewardship and now leads the world in post-consumer paint recycling with a program in every province. In 2014, the industry was responsible for the recovery of approximately one kilogram of leftover paint for every Canadian, approximately 35 million kilograms recovered and recycled.

Individual coatings companies are constantly innovating with new product formulations that are low in VOC emissions, highly functional, smart coatings and with better product performance than ever before. Product stewardship is an approach in which manufacturers, retailers, governments, consumers and others share responsibility for reducing the negative impacts to human health and the environment resulting from the production, use and end-of-life management of a product. Product stewardship systems seek to apportion responsibility for providing program information, logistics and funding.

In 2014, significant effort was required to formally establish a new program operator for post-consumer paint in Canada's largest province, which led to Product Care approved as the new operator in Ontario. The success on this effort will ensure Canada continues to lead the world in post-consumer paint recycling under a new program operator with better overall governance, greater transparency and improved efficiencies. There was also a strong effort to convey key messages on the proposed Waste Reduction Act in Ontario and the required amendments necessary for a new legislative framework for waste reduction.

CPCA also provided input on proposed legislative changes for post-consumer paint in Nova Scotia and Alberta. All three provinces seek to have new regulations for leftover paint in the coming months. CPCA will continue to remain vigilant on this front and seek to harmonize regulations nationally where possible.

THINKING GLOBALLY, ACTING LOCALLY

NORTH AMERICAN & GLOBAL INFLUENCE

CPCA works closely with the American Coatings Association (ACA) on cross-border issues and on initiatives for enhanced regulatory alignment. Over the past several years this included work related to the Canada-U.S. Regulatory Cooperation Council (RCC) on regulatory harmonization. CPCA also works with other national associations around the globe as a member of the International Paint and Printing Ink Council (IPPIC). While it is always a constant challenge for each country to manage the myriad of domestic regulations, it has become increasingly difficult to interpret the potential impact of foreign issues at home. IPPIC works in unison to improve communication and coordination of industry policy on matters of international concern. IPPIC is comprised of paint and printing ink associations representing Australia, Brazil, Canada, China, India, the European Union, France, Germany, Japan, Mexico, Turkey, South Africa, the United Kingdom and the United States. IPPIC's international representation on key issues continues as follows:

- was granted NGO status in 2005 by the United Nations Economic and Social Council on the Globally Harmonized System for Labelling and transportation of dangerous goods;
- represents international industry issues at the United Nations and World Health Organization under GAELP, the Global Alliance to Eliminate Lead in Paint, which is focused on lead in paint for consumer products with specific exposure to children;
- works with the Organization for Economic Cooperation and Development (OECD) on exposure modeling and environmental monitoring initiatives;
- holds consultative status at the International Maritime Organization (IMO) on anti-fouling and corrosion protection standards related to marine coatings;
- hosts a biennial Coatings Summit of coatings company leaders from around the world;
- supports the production of a comprehensive forecast for the coatings industry with the Global Market Analysis published every five years by Orr & Boss.

PROVIDING LEARNING OPPORTUNITIES

SKILLS DEVELOPMENT & TRAINING

DIPLOMA IN COATINGS TECHNOLOGY

CPCA's online training products are an important part of the association's offerings for industry, providing excellent learning opportunities for members and non-members. Along with its **Diploma in Coatings Technology**, CPCA offers online training for GHS and the new Health Products Regulations (formerly WHMIS) as well as training related to the Transportation of Dangerous Goods (TDG).

The 2014 recipients of CPCA's **Diploma in Coatings Technology** included Eric Bockus and Andrew Aoun. They successfully completed all three semesters required for the diploma and joined the more than 800 graduates of the training over the years. The course focuses on theoretical concepts, industrial paint applications and sales and marketing. It is designed for employees of paint manufacturers in product development, as well as sales and marketing professionals. The online course also helps those engaged in raw materials distribution in the coatings industry to train new employees, and paint contractors who need to understand the performance qualities of the products they use.

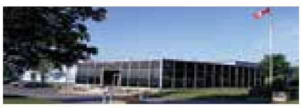
GHS TRAINING PARTNERSHIP

In December 2014, CPCA announced its partnership with Industry Compliance Center (ICC) to offer training to its members on the Globally Harmonized System of Classification and Labelling of Chemicals (GHS). ICC is a premier provider of HAZMAT compliance solutions for regulatory transportation and workplace safety. **The partnership provides CPCA members with discounted rates on ICC's in-person training classes across Canada for GHS Supervisor Manager and GHS Classification, as well as a web portal on CPCA's website for easy access to ICC's online courses on GHS and other workplace topics.** The association is committed to ensuring that its members are able to find the training their employees need for successful implementation of regulations and their ongoing updates.

CPCA ANNUAL SCHOLARSHIP

Based solely on academic achievement at high school and post-secondary levels, the CPCA annual scholarship is granted to children of staff working for member companies. In 2014, **Alexandra Bennett** was awarded a $2,000 scholarship by CPCA's Education & Training Committee.

Chromaflo Technologies



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Ms. Bennett, daughter of a staff member of PPG Canada Inc., graduated with honours in 2012 from Banting Memorial School in Alliston, Ontario. She is currently in her third year of studies at the University of Guelph, majoring in biotechnology and ethics. This is the second time CPCA has awarded this scholarship, which continues the tradition established by the Toronto Society for Coatings Technology over many years. The 2013 inaugural recipient was Mary Yao, daughter of a staff member of long-standing CPCA member John E. Goudey Manufacturing Ltd.

EVIDENCE-BASED RESEARCH = SOUND BUSINESS DECISIONS

INFORMATION, RESEARCH & STATISTICS

Below is a sample of some of the information and research undertaken by the association in 2014 related to the ongoing work of federal regulatory bodies.

General CPCA 2013 Statistical Tables

CPCA statistics on paint shipments of imports and exports — as derived from Industry Canada data — provide insight on important industry trends.

Annual Surveys

CPCA's bi-annual compensation survey report was issued this past summer. CPCA conducts an analysis of the available Statistics Canada financial data series, which combines financial data from paint manufacturing and three other NAICS codes.

CPCA's Management Information Committee (MIC) analyzes the evolution of Statistics Canada monthly data series with respect to paint manufacturing data, finished goods values, inventory values and values of paint raw materials, fuels, supplies and components.

Review of Management Information Services and Action Plans for 2013-2014

CPCA's ***Quarterly Pulse of the Canadian Economy*** informs members on economic forecasts, new market studies, color trends, important market indicators and various studies. There will be further development of this service by CPCA with respect to the availability of virtual learning conferencing and a study to be conducted on the full economic impact (direct and indirect) of the coatings industry in Canada.

CPCA MIC Meeting

The bi-annual meeting of the Management Information Committee (MIC), held jointly with the American Coatings Association, addresses current and emerging markets and new techniques related to data gathering. It also looks at trends and forecasts based on new modeling tools to predict national and paint sector economic performance. It analyzed the increased use of social networks and related psychographics; free trade agreements and threats and opportunities for the chemical sector generally and coatings specifically. Work continues on reviewing the new classification and labelling requirements, registration gateways, standards and common requirements and policies for chemicals. Automotive self-driving trends and their effects on the collision industry and OEMs were also assessed in the context of coatings demand.

protecting valuable assets

Trade Sub-committee Report

MIC is focused on tracking the sales of new categories of products such as DIY wood lacquers and the decline of alkyd products on the Canadian market in certain categories such as dry fog, primers and undercoats, anti-graffiti coatings, waterproofing sealers, concrete and masonry sealers and anti-rust paint. This included tracking the level of standardization of DIY products.

Automotive Refinish Sub-committee Report

Committee members were concerned about the contamination of automotive refinish sales results with the reporting of commercial transportation coatings sales. A question on solvent-borne basecoats that were compliant versus non-compliant subcategories was recently added to the main survey form, now providing greater insight for members.

Indices for Coatings Companies

The U.S. Producer Price Index (PPI) for paint and coatings involves the preparation and compilation of many specific indices by the Bureau of Labour Statistics (BLS), for example, TiO_2, paint fillers, synthetic dyes, lime, plastic resins, steel cans and barrels. The PPI for pigments has greatly increased in recent years in relation to the PPI for plastic resins or prepared paints. Newly improved indices for exterior architectural, interior architectural, transportation finishes, OEM and special purpose products are available. Other retailing indices are also available to members, such as the paint store index or retail index.

Modeling for Architectural Coatings

The validity of leading indicators in the coatings industry is examined on a regular basis by this CPCA committee, such as total residential construction, total new and existing home sales and total non-residential construction. Key predicting models are also updated regularly for the benefit of members.

*NOTE: Copies of presentations related to the above items are available on the **Members Only** section of the CPCA website.*

The Canadian paint manufacturing market in 2014 represented a value of $3 billion in terms of production and 400 million litres. In comparison, the U.S. coatings market represents 20 percent of the global $118 billion coatings sales market, with a value of $21.8 billion (U.S.). The U.S. paint manufacturing industry is still the main business partner for the Canadian paint manufacturing industry as it captures 91 percent of all paint exports and paint imports. The American breakdown of architectural versus industrial manufacturing shipments is similar to Canadian paint manufacturing shipments in terms of percentages.

RAISING PROFILE, ENHANCING ADVOCACY

STRATEGIC COMMUNICATIONS

CPCA is arguably one of the leading associations delivering strong internal communications that are regular, comprehensive, relevant and timely. Technical committees are fully engaged on relevant issues impacting the industry. To broaden the engagement of members and to highlight industry initiatives, members receive a monthly newsletter, ***Prime Time News***.

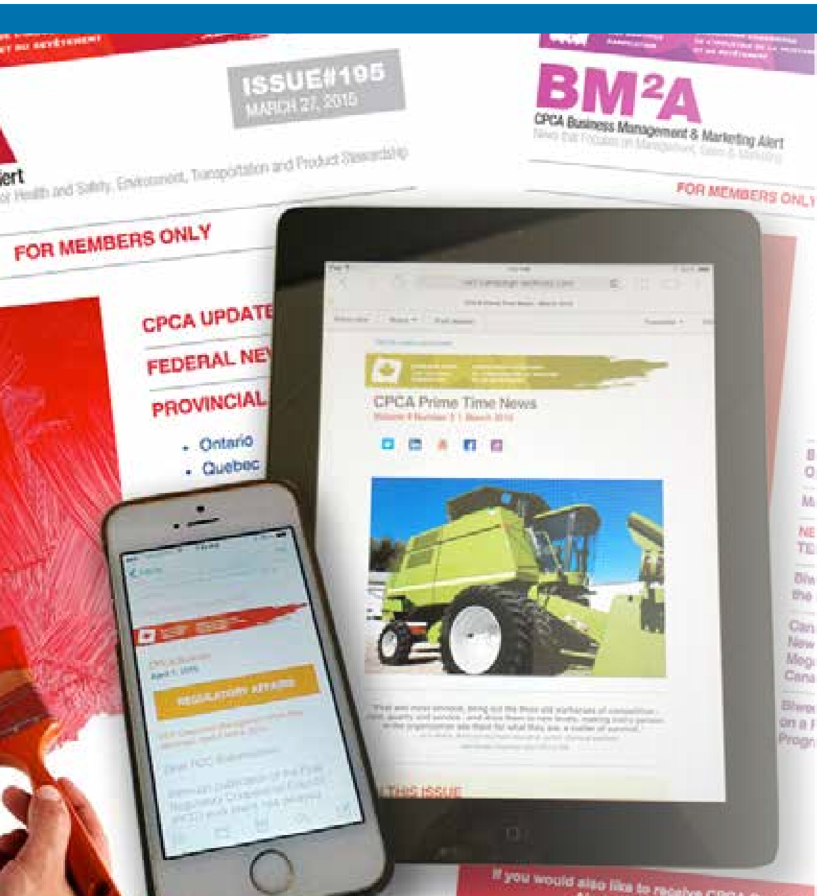
This is supported by a compelling website for both the public and a ***Members Only*** section that is "evergreen" with archived information updated and relevant for member use. To ensure members are fully informed on all matters of importance, they receive regular communications products throughout the year. These publications include:

- Ongoing outreach to members via the ***Regulatory News Alert***, the ***Prime Time News*** e-newsletter, ***Quarterly Pulse***, ***Information Bulletins*** and current ***News Releases***.
- 2014 saw the introduction of a new bi-monthly ***Business Management and Marketing Alert*** and a '***Need to Know***' monthly reminder of events and regulatory compliance requirements ensuring members are fully informed.

CPCA continues to connect via social media and has been driving more communications and website visits. The association is active on four major social media platforms engaging the new generation of leaders in the industry: **LinkedIn**, **Twitter**, **Facebook** and **YouTube**. CPCA's social media activity has grown substantially on all platforms, further engaging members, stakeholders and the public.

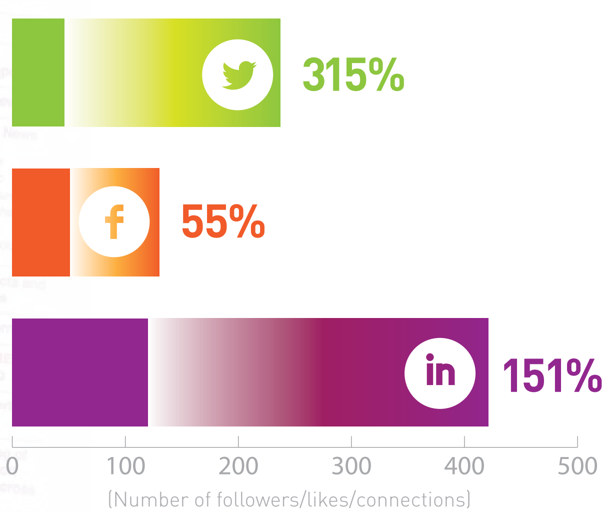
The **Annual Conference & AGM** provides ongoing networking opportunities and addresses current issues in the coatings industry.

Other communications included profiles in the ***Canadian Construction Association*** trade magazine with 75,000 subscribers, paint industry overview by ***Business Review Canada***, ***Construction Digital Magazine***, ***Ontario Construction Report*** and regular updates in the highly regarded ***Canadian Finishing and Coatings Manufacturing Magazine*** (CFCM), as well as various earned media such as ***Business in Vancouver Magazine*** and ***Paint and Coatings Industry (PCI) Magazine***.



CPCA Social Media Growth

Jan.1, 2014 to Mar. 31, 2015



44,761 website page views in 2014
More than **4,000** website page views each month

COLLABORATION OVER CONFRONTATION

STAKEHOLDER RELATIONS

CPCA understands that it is not alone on some issues. There are many organizations and individuals the association works with regularly to accurately reflect industry's needs on a wide range of issues. Moreover, it is important that CPCA listen to what respected stakeholders have to say whether they be government, trade associations, standards organizations, non-governmental organizations or the public. Effective stakeholder relations require that CPCA consider the views and formally stated positions of others in the context of the concerns and aspirations of the coatings industry.

GOVERNMENT CONSULTATIONS

Globally Harmonized System for Chemicals in the Workplace
GHS is critical for industry as every member is directly impacted once the new GHS regulations are effectively in place across all provinces and territories in June of 2015, and followed by a two-year transition period for manufacturers and importers.

Third VOC in Certain Products Regulations
A number of important recommendations were made to ensure that members' products covered by this regulation are not unduly impacted in the marketplace.

Regulatory Cooperation Council
CPCA worked with the American Coatings Association (ACA) on the submission to the RCC on the need for positive alignment of Canadian regulations with those of the United States. Recommendations noted critical elements that must be considered in the next RCC work plan, and helped raise the profile for industry concerns with respect to GHS implementation along with respected industry associations like the Chemistry Industry Association of Canada (CIAC).

Ontario Waste Reduction Act
CPCA submitted a dozen recommendations for amendments to the proposed Act that would benefit members, while at the same time continue with effective waste reduction in Ontario. This helped clarify the industry's views on the impact of new legislation for paint and coatings stewards in Ontario. Ninety-one percent of these stewards are CPCA members representing almost half of the entire Municipal Hazardous or Special Waste (MHSW) program in the province.

Coalition for Effective Waste Reduction in Ontario
In concert with 15 other associations CPCA developed a common submission advocating for amendments to the proposed Waste Reduction Act in Ontario. This effort resulted in slowing the passage of the Bill to allow time for effective amendments to be made, which ultimately saw the proposed Act discarded completely by government based on industry's intervention.

UN Subcommittee on Transportation of Dangerous Goods
Working under the oversight of the International Paint and Printing Ink Council (IPPIC), CPCA engaged in and supported efforts to harmonize shipping requirements for Canada and other countries to eliminate lost production time and added costs in cross-border and multi-modal shipments of paint and allied products.

MULTI-STAKEHOLDER CONSULTATIONS

CEPA Industry Coordinating Group (ICG)
Consultations continued on Phase 2 and 3 of the Chemicals Management Plan with many multi-stakeholder meetings in 2014 on all aspects related to the risk assessment of chemicals in commerce.

Canadian Manufacturers Coalition
Ongoing advocacy for better legislation and regulation for the manufacturing industry including participation in a Manufacturing Lobby Day on Parliament Hill with 65 Members of Parliament. In 2014, the Manufacturing Coalition's membership was comprised of 54 industry associations, representing all key industrial sectors across Canada, roughly 100,000 companies and approximately 2 million people in manufacturing and supporting industries.

Canadian Allied Industries Group
Ongoing discussions and sharing of best practices with associations in some aspect of the chemical industry with two meetings held in 2014.

Coalition for Effective Waste Reduction in Ontario
Advocating for amendments to the Waste Reduction Act in Ontario along with 15 other business trade associations representing $400 billion in annual revenues, which also included a formal submission and a Lobby Day at Queen's Park with 60 MPPs.

Waste Diversion Ontario
Extensive consultations and advocacy on an Industry Stewardship Plan (ISP) was successful in establishing Product Care as the new program operator for the paint and coatings category in the MHSW program, the largest post-consumer paint program in Canada with over 10,000 tons annually in post-consumer paint recovered and recycled.

National Advisory Council on Chemicals Management
CPCA is one of six national associations along with government and important NGO organizations engaged in dialogue on the Chemicals Management Plan with two meetings annually.

International Paint and Printing Ink Council (IPPIC)
Comprised of paint and coatings associations representing coatings companies in more than 40 countries, meeting regularly

to share information and work with global organizations such as the United Nations (UN), the Organization for Economic Co-operation and Development (OECD) and the International Maritime Organization (IMO).

SUPPORTING CANADIAN MANUFACTURING

Working in concert with allied associations, such as the Canadian Manufacturing Coalition, comprised of 54 associations, CPCA continued its advocacy with respect to the persistent challenges for Canadian manufacturing. CPCA supported the establishment of a $150 million Capital Investment Fund to directly aid the development, expansion or upgrading of production facilities leading to job creation and productivity improvements.

CPCA supported changes to the Scientific Research and Experimental Development (SR&ED) tax credit, introduced in 2012 by the federal government, which led to savings of $664 million a year. These funds need to be reinvested in direct funding for business R&D. Projects for these funds could include manufacturing and process output firms in Canada, including building new production facilities, expanding current facilities or revamping existing facilities. Advocacy efforts also support the need for buildings, machinery and equipment being eligible for funding to a maximum of 30 percent of total project costs. This could be matched by similar provincial programs should they wish to support more R&D in Canada.

CPCA also supported measures in the federal budget in 2014 as follows:

- Extension of the Accelerated Capital Cost Allowance (ACCA) for investments in manufacturing and processing machinery and equipment for another five years, giving companies time to plan and install equipment as part of large capital expansion projects;
- Creation of a fund to help Canadian manufacturers secure strategic investments and product mandates;
- Increasing direct funding to manufacturers for purposes of new product development, demonstration and commercialization;
- Introduction of a workplace training tax credit that is creditable against employment insurance premiums;
- Developing national standards for environmental regulations and stewardship programs across Canada; and
- Introducing a Regulatory Modernization Act requiring federal regulators to adopt best practices in regulatory management and cooperation.

VALUE-ADDED NETWORKING

EVENTS AND INDUSTRY AWARDS

2014 ANNUAL CONFERENCE AND AGM

CPCA held its 101st annual conference and AGM in historic Quebec City from October 5-7, 2014. The three-day event involved a number of activities for attendees, including a tour of Quebec City, special presentations by industry experts, the Chair's Annual Gala Dinner and the annual industry award presentations.

The 2014 conference focused on important industry issues such as how the industry continues to evolve in a competitive economic environment in a world with increasing demands on the way it does business. The business sessions began with a discussion on the current state of the paint and coatings industry in Canada and around the world, and the prospects for future growth outlined by **Charles Bangert**, a partner with Orr & Boss. Mr. Bangert noted that while Canada's paint and coatings sector is still trying to gain traction following the recession of 2009, it remains a mature, stable and healthy industry.

A panel brought together three speakers focused on innovation in the coatings industry with new and improved products. **Veronic Landry**, a senior scientist with FPInnovations, talked about the creation of scientific solutions in support of the Canadian forest sector's global competitiveness. Ms. Landry outlined synergies between the coatings industry and wood products manufacturing by citing examples from completed, ongoing and future projects.

Serge Depatie, Vice-President of Business Solutions for Group NanoXplore Inc., gave a presentation about his company's specialization in the science of graphene and its derivative materials. Mr. Depatie touted the advantages of graphene's applications in the paint and coatings industry, which include its anti-corrosion properties and thermal management, as well as its anti-bacterial and hydrophobic qualities. Professor **Christian Moreau**, one of two scientists at Concordia University who were recently awarded $2.8 million in funding as Canada Research Chairs for Functional Coatings Technology, provided interesting insight on his research into new coatings and functional surface solutions that will improve energy efficiency in aerospace, automotive, biomedical and other industrial applications.

2014 ANNUAL CONFERENCE AND AGM

Josette Buisson, President and Creative Director of Alias Color, discussed the evolving nature of colour marketing and how to successfully attract consumers. While some classify this topic as an esoteric issue, Ms. Buisson explained the relevance of the language of colour and how consumers change their buying preferences as their lives evolve.

Mark Kurschner, President of Product Care Association, updated all on post-consumer paint recycling with details about Product Care's current operating programs across Canada. Mr. Kurschner also provided insight on the Industry Stewardship Plan (ISP), which obtained final approval on December 10, 2014, and will see Product Care become the new program operator for post-consumer paint in Ontario on June 30, 2015.

Tony Papa, National Product Manager for Univar Canada, addressed the issues facing key distributors in the coatings industry and their ongoing efforts to bridge the gap between manufacturers and users. He spoke about transportation challenges, as well as channel management and regulatory issues that affect distributors on both sides of the border.

Finally, keynote speaker **Stéphane Simard** delivered a special presentation on new ways to increase profits by examining advanced trends in human capital management. An international speaker and author of four books, including the best seller Generation Y, Mr. Simard outlined a number of techniques to increase employee retention and achieve outstanding results.

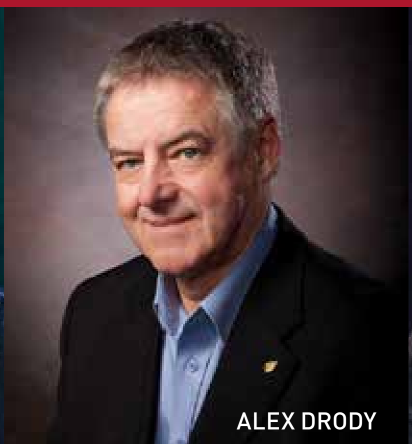
2014 CHAIR'S GALA DINNER AND INDUSTRY AWARDS

The Chair's dinner was hosted by CPCA's Board Chair, **Dale Constantinoff** of Sherwin-Williams, and attended by representatives from the Canadian coatings industry. During the event, Mr. Constantinoff was honoured for his commitment to CPCA. Mr. Constantinoff completed his three-year term as the association's Board Chair with **Tim Vogel** of Cloverdale Paint elected as the new Chair during the AGM.

DALE CONSTANTINOFF /SHARON KELLY


MIKE KLEIN


MADELYN HARDING


ALEX DRODY


TERRY SUTHERLAND

CPCA INDUSTRY AWARDS PROGRAM

CPCA has several industry awards that recognize the contributions made by its members. Nominations for these awards are sought throughout the year and presented at the annual conference.

Roy Kennedy Outstanding Achievement Award

Presented each year, this prestigious award goes to an individual who epitomizes Roy Kennedy's dedication to the association, its members and the paint and coatings industry.

The association's highest honour was presented to **Mike Klein**, the President and CEO of Dominion Colour Corporation (DCC). After a successful career in South Africa's chemical industry, Mr. Klein immigrated to Canada in 1987. He joined Dominion Colour Corporation as General Sales Manager and was appointed President of DCC in 1996. He has been instrumental in the international growth of the company organically and through acquisitions for the past 20 years. Mr. Klein and his three partners purchased DCC from its Japanese owners in 2008. Mr. Klein has also been an integral part of CPCA's Board of Directors for the past 13 years. One of his key contributions has been to provide a link between the coatings and pigment industry in North America.

Industry Statesmen Award

The Industry Statesman Award is awarded to those individuals who have retired, but who have made outstanding, long-term contributions to the industry and the association. It is important to note that these individuals were nominated by their peers and unanimously approved by the Board of Directors.

After almost 33 years with Sherwin-Williams, **Madelyn Harding** recently retired as the Director of Regulatory Affairs in the Corporate Department of Environmental, Health and Regulatory Services. Over the years, Ms. Harding was a dedicated member of CPCA's Health, Safety and Environment Committee. She played an important role by voicing her company's point of view in various CPCA committees and forums, especially with respect to the development of Canadian VOC regulations and the use of paint-related substances listed in the Chemicals Management Plan.

Industry Achievement Award

The Industry Achievement Award is presented to individuals or organizations that have demonstrated exceptional achievement in advancing the interests of the industry and/or the association.

In 2014 there were two worthy recipients. The first recipient was **Alex Drody** who retired from Cloverdale Paint in 2013 after an impressive career in the paint and coatings industry. Mr. Drody began his career at Cloverdale Paint in the 1970s, eventually rising in the ranks to the position of Executive Vice-President and Chief Operating Officer in 2007. His career achievements include the creation of new testing procedures and standards, growing Cloverdale's western sales teams and envisioning a Cloverdale Paint high performance coatings line in 1985.

The second recipient was **Terry Sutherland** of PPG Canada Inc. He started his career with PPG in 1985 and then worked in a variety of laboratory and manufacturing positions at PPG's Clarkson facility, culminating in his current position as Manager of EHS and Regulatory Compliance. Mr. Sutherland started volunteering with CPCA in 2008 as a member of the Health, Safety and Environment Committee and the Paint and Coatings Working Group. Mr. Sutherland takes his role as a CPCA volunteer seriously, especially when it comes to participating in and helping guide regulatory initiatives in Canada that protect human health and ensure a healthy environment for all Canadians.

a unified voice
stronger together

TECHNICAL COMMITTEES IN ACTION

HEALTH, SAFETY AND ENVIRONMENT COMMITTEE

This committee reviews, discusses and addresses environmental, health and safety regulatory issues affecting the three sectors of the paint industry (architectural, industrial and automotive). The committee has responsibilities in the following areas:

- *Canadian Environmental Protection Act, 1999* (CEPA 1999)
- Chemical management
- Occupational health and safety
- Government policies, programs regulations and legislation

PAINT AND COATINGS WORKING GROUP (PCWG)

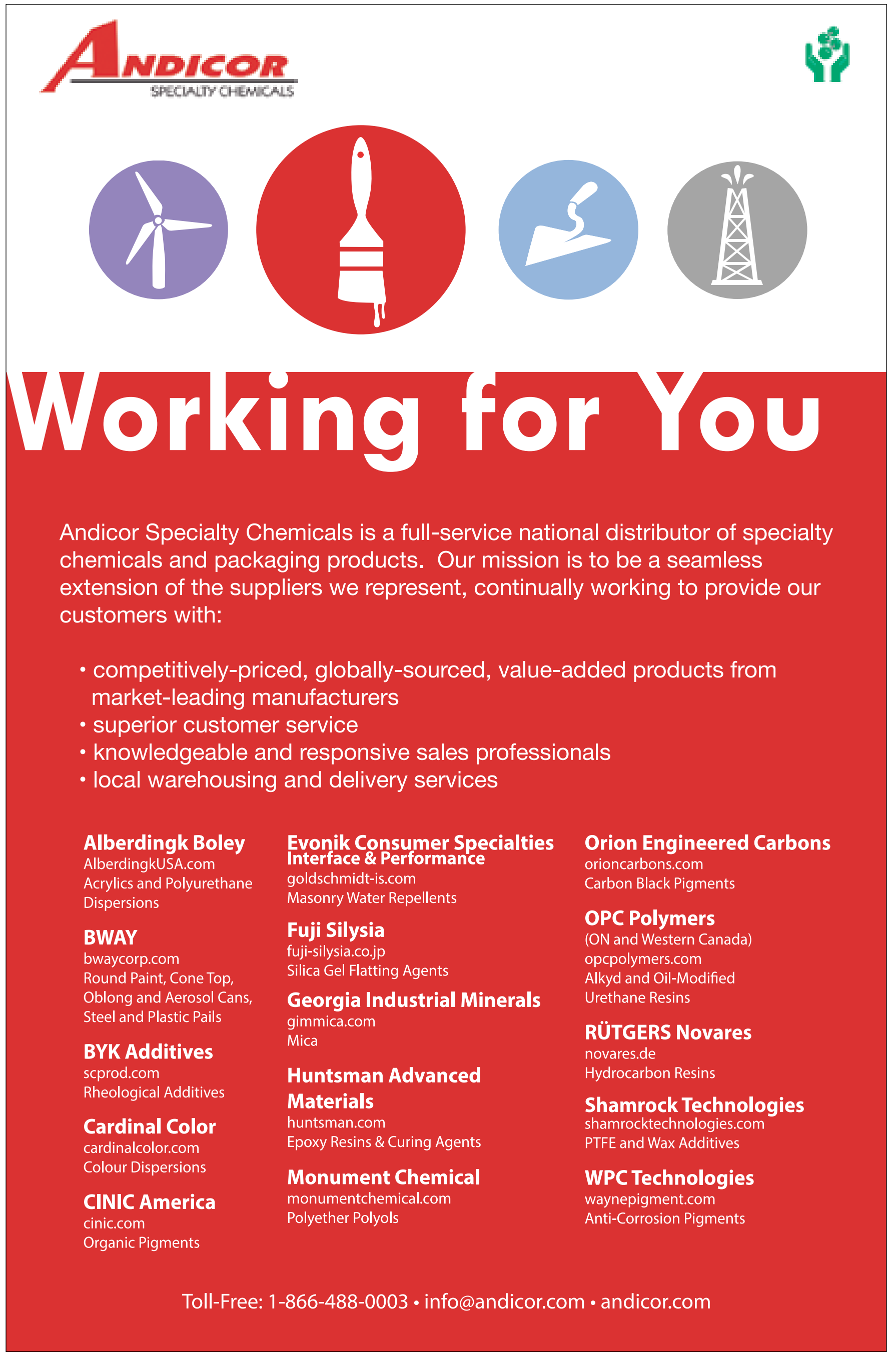
Widely recognized for its effectiveness by both government and industry, this HSE sub-committee, the Paint and Coatings Working Group (PCWG), leads sector discussions on the Chemical Management Plan's risk assessment of substances related to paint and coatings. Under the HSE Committee, the PCWG is comprised of CPCA staff and members, as well as key officials from Health Canada and Environment Canada. The group regularly assembles and exchanges detailed sectoral information with Environment Canada and Health Canada to help understand the sector's involvement with chemicals and to develop appropriate risk assessment measures and risk management instruments.

PRODUCT STEWARDSHIP COMMITTEE

This committee is responsible for providing oversight on stewardship programs in the provinces, with jurisdiction over such programs, and provides the Association with advice on all other sustainability matters impacting the sector. Committee members were active on issues related to post-consumer paint recycling in Ontario and the need for a strong industry-led approach under a new Industry Stewardship Plan (ISP) for a new program operator in the province.

AUTO REFINISHING COUNCIL

This council was formed to put in place several initiatives related to the industry's enhancement of VOC emission reductions, codes of practices and use of the best available technology for the application of automotive refinishing products. The council will continue to focus on the need to ensure



member engagement

consideration of sound regulations for industry with direct input from member companies doing business in Canada.

AEROSOL COORDINATING SUB-COMMITTEE

Working under the Health and Safety and Environment Committee, CPCA's Aerosol Coordinating Sub-committee's primary focus is on Canadian and North American VOC regulatory issues surrounding industrial and consumer aerosol paint products. This sub-committee relies on the participation and support of members of the American Coatings Association (ACA). The present concerns relate to the development and alignment of suitable risk management approaches and the adoption of new VOC standards for aerosol products in Canada, including those imported into the country.

MANAGEMENT INFORMATION & STATISTICS COMMITTEE

This committee has responsibilities for the management of statistical programs and services for the association related to industry trends. It also provides analytical support for government relations and issue management activities. It meets twice annually in concert with the American Coatings Association representatives, member companies and industry experts to address a wide array of important issues for members.

EDUCATION & TRAINING COMMITTEE

The committee provides important input on the training, advice and development needed to help sustain the paint and coatings industry at a time when skills shortages are a major challenge.

QUEBEC PAINT INDUSTRY ASSOCIATION

AQIP (the Quebec Paint Industry Association) includes CPCA member representatives in Quebec, and works closely with CPCA staff to address regional (municipal and provincial) government and business issues in Quebec. AQIP also partners and receives a wide range of services from several other important active Quebec associations, such as CPEQ (Quebec Employers' Centre for the Environment), CPQ (Conseil du patronat du Québec), representing all sectors of Quebec economic activity, CPSST (Quebec Employers' Centre for OHS), Co-effiScience (Quebec Manpower Development Centre dedicated to the chemical industry workforce) and Eco-peinture (product stewardship).

STRONGER TOGETHER

GROWING MEMBERSHIP

Membership continues to grow with a number of new members joining CPCA in 2014. This continues to highlight the positive perception that non-members have for the work done by CPCA on behalf of industry. This trend is expected to continue and help make the association even stronger with more value-added programs and services benefitting industry. It also helps convey to all stakeholders that the paint and coatings industry speaks with one, strong and unified voice on issues that matter.

BECOME A MEMBER TODAY!

cpca@canpaint.com

WHAT CPCA MEMBERS SAY:

"CPCA's analysis and understanding of the regulatory and political process really opened some eyes. You were 'spot on' in everything you predicted. I think this really sends the message to those that aren't currently members of the CPCA that they should get on board."

L.V. Lomas

"The voice we achieved with federal decision makers - and the respect they clearly paid CPCA is testament to the growth and success our organization has achieved."

Home Hardware Stores Ltd.

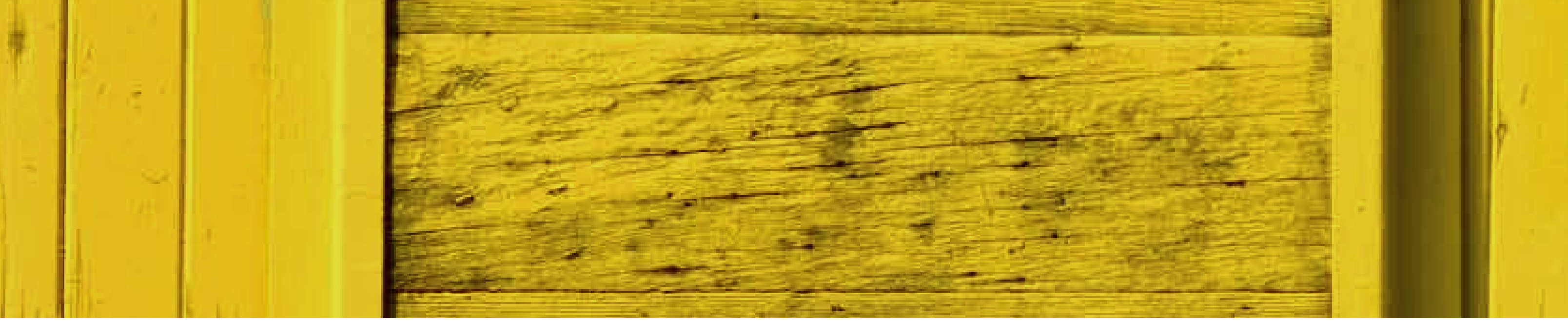
"The CPCA is doing a wonderful job with keeping up with the various regulatory changes that affect the paint and coatings industry. The information provided has been very useful."

AkzoNobel

SPECIAL THANKS TO MEMBER VOLUNTEERS

The following list recognizes some of those who continue to volunteer their time and effort on important committee work to advance the interests of the industry and their respective companies. **Thank you**.

Lorraine Bennett (PPG) • Errol Bonaventura (Inortech) • Eric Bos (Sansin) • Linda Bourgeois (Home Hardware) • Brandon Bradford (Jones-Blair) • Greg Brown (Brenntag) • Michael Butler (Behr) • Pierre Chapdelaine (MF Paint) • Brigitte Charpentier (PPG) • Clara Chin (AkzoNobel) • Prokopis Christou (Benjamin Moore) • Mario Clermont (Re-Source) • Barry Cupp (Sherwin-Williams) • Chris Currie (John E. Goudey) • David D'Abadie (Dupont) • Jeff Danneman (Reichhold) • Sarah Dahm (AkzoNobel) • Remy Delisle (PPG) • Sonia Dufresne (Inortech) • Lawrence Durante (Sherwin-Williams) • Pamela Falcone (Benjamin Moore) • Dan Forestiere (Sherwin-Williams) • Kyle Frakes (Tnemec) • Margie M. Fritz (PPG) • Tim Gallant (Sherwin-Williams) • Ravi Ganti (Valspar) • Isabelle Gelinas (Laurentide) • Elizabeth Gilbert (Sherwin-Williams) • Terri Goulding (Home Hardware) • Banait Gurmukh (PPG) • Pamela Falcone (Benjamin Moore) • Robert S. Fierheller (PPG) • Dan Forestiere (Sherwin-Williams) • David Huettner (Behr) • George Humphrey (Benjamin Moore) • Bob Israel (Valspar) • Mike Jacobs (OPC Polymers) • Jake Jevric (L.V. Lomas) • Laura Johnston (Axalta) • Frank Jossinet (AkzoNobel) • Mike Koss (PPG) • Jon Kuch (Behr) • Tuija Laughlen (BASF) • Jim Leamen (L.V. Lomas) • Mike Levesley (ICA North America) • Ed Linton (Cloverdale) • Gilles Lussier (Chemours) • James MacKinnon (Sansin) • Grace Manarang-Pena (Dominion Colour) • Martin Ménard (Celanese) • Deborah Moilanen (AkzoNobel) • Emanuele Morello (MF Paint) • Diane Nash (AkzoNobel) • Debbie Nucciarone (PPG) • Sheri Oberle (AkzoNobel) • Gregg Parsons (L.V. Lomas) • Al Pliodzinskas (Hempel) • Richard Posatiere (Sherwin-Williams) • Dan Pourreau (LyondellBasell) • Whitney Randall (Henry) • Mary Redmond (Valspar) • Paulus Reynolds (Farrow & Ball) • Patrick Rodrigue (Micca) • Michael Savard (Benjamin Moore) • Ian Seunarine (Duha) • Frederic Simard (Bayer) • Tom Snider (Rodda Paint) • Michele Stauffer (BASF) • Judy Stevens (Chromaflo) • Sherry Stookey (Valspar) • Terry Sutherland (PPG) • Stacey-Ann Taylor (Henry Company) • Chad Taylor (PPG) • Andrew Thick (Farrow & Ball) • Ed Thompson (L.V. Lomas) • Valerie Tunstall (Axalta) • Bruce Varner (Rust-Oleum) • David Warburton (Axalta) • Nancy Wason (Bayer) • Terry Wiseman (AkzoNobel) • Josh Wiwcharyk (Loop) • Michael Wolfe (Emco) • Jennifer Wolfenden (Benjamin Moore) • Steve Wolinsky (Rust-Oleum)



GLOSSARY OF TERMS

2-BE	2-Butoxyethanol

A

ACA	American Coatings Association
ACC	American Chemistry Council
ADM	Assistant Deputy Minister
AMPs	Administrative Monetary Policies
AQIP	Association Quebecoise de l'industrie de la peinture

C

CAIG	Chemical & Allied Industries Group
CARB	California Air Resources Board
CAS#	Chemical Abstracts Service number
CBI	Confidential Business Issues
CBP	U.S. Customs and Border Protection
CBSA	Canada Border Services Agency
CCMTA	Canadian Council of Motor Transport Administrators
CCOHS	Canadian Centre for Occupational Health and Safety
CEPA	*Canadian Environmental Protection Act*
CEPE	European Council of Paint, Printing Inks, Artists' Colours Industry
CFIA	Canadian Food Inspection Agency
CFTA	Canada Free Trade Agreement
CIAC	Chemical Industry Association of Canada
CMC	Canadian Manufacturing Coalition
CMEA	Canadian Manufacturer Exporters Association
CMP	Chemicals Management Plan
CPSC	Consumer Product Safety Commission
CSA	Canadian Standards Association
CSB	U.S. Chemical Safety Board
CSSA	Canadian Stewardship Service Alliance
CTA	Canadian Trucking Alliance

D

DG	Director General
DM	Deputy Minister
DSL	Domestic Substances List

E

ECHA	European Chemicals Agency
EPA	U.S. Environmental Protection Agency
ESDs	Emission Scenario Documents

F

FDA	U.S. Food and Drug Administration

G

GHGs	Greenhouse Gases
GHS	Globally Harmonized System of Classified and Labelling of Chemicals

H

HC	Health Canada
HCS	Hazard Communication Standard
HPR	Hazardous Products Regulations
HSE	Health, Safety and Environment

I

ICG	Industry Coordinating Group

L

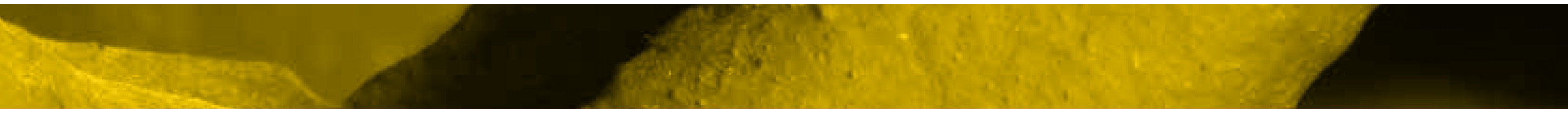
LNG	Liquefied Natural Gas

M

MEKO	2-Butanone oxime
MIC	Management Information Committee of CPCA
MHSW	Municipal Hazardous or Special Waste
MOE	Ministry of Environment
MOU	Memorandum of Understanding
MP	Member of Parliament
MPP	Member of Provincial Parliament
MSDS	Material Safety Data Sheet

N

NAC-CMP	National Advisory Council on Chemicals Management Plan
NAFTA	North American Free Trade Agreement
NDP	New Democratic Party



NDSL	Non-domestic Substances List
NGO	Non-government Organization
NOI	Notice of Intent
NPRI	National Pollutant Release Inventory
NSACB	New Substances Assessment and Control Bureau
NSC	National Safety Code

O

OECD	Organisation of Economic Cooperation and Development
OPA	Ontario Paint Association
OSHA	U.S. Occupational Safety and Health Administration

P

PCA	Product Care Association
PCPA	*Pest Control Products Act*
PCWG	Paint and Coatings Working Group (CPCA Committee)
PMRA	Pest Management Regulatory Agency
PS	Parliamentary Secretary
PSB	Product Safety Bureau
PSL 1 or 2	Priority Substances List 1 or 2

R

RA	Risk Assessment
RCC	Regulatory Cooperation Council
RCC	Retail Council of Canada
RCO	Recycling Council of Canada
RIAS	Risk Impact Analysis Statement
RM	Risk Management

S

SDS	Safety Data Sheets
SNAc	Significant New Activity
SNUR	Significant New Use Rule

T

TSCA	*Toxic Substances Control Act* (U.S.)

V

VOC	Volatile Organic Compound

W

WDA	*Waste Diversion Act*
WDO	Waste Diversion Ontario
WHMIS	Workplace Hazardous Materials Information System
WHO	World Health Organization
WSIB	Workplace Safety and Insurance Board
WWG	WHMIS Working Group

2015 MEMBER DIRECTORY

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