

→ A Brief Look Inside Canada's Coatings Industry ⊦

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MAY 2020

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Business has only two functions – marketing and innovation.

Peter F. Drucker

LATEST ADVOCACY EFFORTS

- COVID-19: CPCA Continues to Provide Members with Updates on Government Programs for Businesses via Bulletins, the CPCA Coatings HUB, and the COVID-19 Resources Page on the CPCA Website
- CPCA Comments on the Government's Proposed Toxicity of Turpentine and Turpentine Oil in Paint and Paint Thinners/Strippers/MPS
- CPCA Comments on Federal Government's Draft Science Assessment of Plastic Pollution
- CPCA Files Comments on Stewardship Ontario Consultation on the Ministerial Direction to Return 100% of Industry Steward Surplus Funds for Waste Recycling
- CPCA and ACA Jointly Comment on Regulatory Cooperation Council's Work Plan to Stop Misalignment of Key Paint Biocide Registrations
- CPCA Actively Supports ACA/ACC Comments on the US EPA Draft Risk Assessment Proposing Restrictions on Several Isothiazolinones (ITAs) Used in Coatings
- Paint and Coatings Working Group Members Updated on Federal Government's Consultation Plan on Future Architectural VOC Regulatory Amendment
- CPCA Members Access Summaries of the Paint and Coatings Working Group and CIC Teleconference Meetings via the CoatingsHUB

PLEASE NOTE: Should members require further information on any of the above or other items included in this newsletter they can search them on the CoatingsHUB or contact CPCA directly.

INSIGHT 2021 ADVERTISING OPPORTUNITIES NOW OPEN

CPCA INSIGHT, Industry Guide and Directory, is the resource for the most relevant Canadian paint and coatings industry information. Providing an annual snapshot of the Canadian paint and coatings industry and offering a wealth of useful, easily accessible reference information about the CPCA, its members, its activities and its services. INSIGHT is distributed along with CFCM's Buyer's Guide to over 5,000 CASE companies in Canada and the US. With a readership comprised of high level executives and the c-suite advertisers can bolster their marketing efforts. INSIGHT is also availble online and in a digital format for all CPCA Members.

To Advertise visit canpaint.com or contact mditullio@canpaint.com





NOW LIVE CPCA's CMP SUBSTANCE DATABASE

CPCA's Substance Database is NOW LIVE on the Canada CoatingsHUB, complete with over 1,100 CASE related chemicals, sorted by CAS-RN, providing members the current status on chemicals in commerce and any changes being considered.

To book a training session contact mditullio@canpaint.com

NEW MEMBERS



Spray-Net is a Canadian-owned and operated company with over 36 locations across Canada. Blending technology with innovative paint and coatings they are transforming the exterior of homes in a way that leaves the owners satisfied with a solution that will last. Spray-Net bridges the gap between conventional exterior house and factory painting. Using their proprietary line of specially-formulated, weather adjustable coatings and specialized spraying technique

to revamp exterior siding, stucco, brick, doors, and windows. The chemistry of their exterior paint formulations include acrylic dispersions, polyurethane, elastomeric copolymer emulations and silicate stain. Spray•Net delivers factory finishes that look

Past Issues top-of-the-line ingredients for their paint. Spray-Net's vision and mission are

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science & technology to bring renovation solutions to homeowners that weren't necessarily possible before. The goal is to provide every homeowner with a renovation that increases property value, is practical, cost-effective and makes them fall in love with their home all over again."



Baolijia is based in Shanghai within the metropolis of the city and with convenient transportation links to its facilities via expressways, railways and waterways - in all directions. It is one of the largest emulsion production bases in Shanghai and in all of China. The company is based on the development of innovative technology, specialization and scale. It has strong production capabilities in several plants and works hard to ensure it is responsive to customer demands.

Baolijia's goal is to continue manufacturing quality products and to become one of the strongest brands in China. The company has 6 production plants all over the country with products sold in all provinces and cities, and with exports to Southeast Asia, Europe and America. It is a solid foundation on which Baolijia plans to build a truly global company.

Baolijia has first-class standards of operations and continues to focus on modernization in the industry. A crucial part of that is its specialized evaluation technology centre for the research and development and application of emulsion technology. It has gathered a large number of experts, professors, senior engineers and management personnel, with strong cooperation from domestic research institutions and universities. It recently launched a variety of new emulsions complying with international standards for formulations used in architectural, waterproof, textile, textile additive, packaging, additive and other functional products.

IN MEMORIAM



is with deep sadness that **CPCA** lt recognizes the founding publisher of Canadian Finishing the and Coatings Magazine, Pete Wilkinson, who passed away on April 30 after bravely battling cancer. He was 72.

Pete was well known in the industry and a friend to many. He was tireless in promoting the industry by virtue of the fact that he always

s to trade shows, conferences and various events. He truly loved his s lustry in general as the thousands of subscribers indicate. His efforts

the industry a window on itself and that is not something not every industry has in these digital times. I know that many appreciate the work he did for the industry, which our members did, and we will miss him as a regular figure at CPCA events especially. For Pete's tireless efforts CPCA was proud to have awarded him the highest award the association presents in 2018, the Roy Kennedy Award, presented to an individual who has made an outstanding contribution to CPCA and who epitomizes Roy Kennedy's dedication to the Association, its members and the paint and coatings industry.

Born in Toronto in 1947, he studied English at the University of Waterloo, where among other things, he promoted and organized rock concerts for the other students. His early career centred on the camera business, selling cameras of all types across Ontario. He remained a photography buff throughout his life, and he made photo spreads a consistent feature in CFCM. He was also a keen fisherman, who always enjoyed an afternoon spent on the lakes around southern Ontario, especially near his home close to Peterborough.

He switched from camera sales to the publishing industry in the 1980s, working for magazines serving a variety of industries. In this period, he was employed by Maclean-Hunter Ltd. and Naylor Publishing Co. In April 1995, he joined the former Kay Publishing Co. as a sales representative for Coatings Magazine. Coatings were bought by Toronto-based Rogers Media in 1999, and he moved with the publication, at the same time taking over as publisher, following the retirement of the magazine's founder, Barry Kay.

In 2007, he launched CFCM magazine, using his extensive experience and contacts in the paint and coatings industries. As a business partner, he was joined by Brian Jones, whom he had met when Jones was a financial consultant to Rogers Media. His new venture was initially published in tabloid format, switching to the more conventional journal format in 2015. The magazine grew and thrived and Pete became a fixture in the industry, always seen at tradeshows with his signature camera in his hands.

Pete became the sole owner of CFCM in 2018. Pete's illness was a form of multiple myeloma and had been diagnosed in April of that year, but he drew strength from running the publication and from his life partner, Jacquie, and sister, Mary. Pete remained dedicated to his beloved magazine, working and connecting with clients throughout his illness. He always used to say, "As long as I have a phone, I can sell."

A wonderful man and a kind soul, Pete will be dearly missed. His staff remain dedicated to his legacy and the industry he loved.



CLARIANT

Clariant is a dynamic company with a dynamic history. Many ups and downs characterize it and have created a storm-tested specialty chemicals company. Take a look back at Clariant's achievement during the past 25 years of changes. Through successful divestments, resilience of its portfolio, and some important additional efficiency measures, Clariant has become



one of the best-positioned specialty chemical companies. In the years to come, Clariant's success will be about combining innovation and proximity to their customers, by bringing R&D and technology to them. Its new Consumer Care Innovation Center in New Jersey is a good example. Clariant is also building an innovation center in Shanghai.

PRESIDENT'S MESSAGE

Reducing Chemical Management Risk

Chemical management is a never-ending process fueled by the evolution of new European, U.S. and Canadian policies designed to address potential harm to people and the environment caused by toxic chemicals. As new research around chemicals in products evolves it is critical that global and national organizations manage the use of those chemicals across their supply chains. Our member companies, as do many others, take this responsibility seriously. Chemicals are used in an estimated 96% of manufactured products and paint and coatings is no exception.



Companies have relied upon a variety of voluntary and mandatory manual processes to control the flow of chemical risk in their operations and products. Increasingly companies are moving to more digital approaches because tracking, monitoring and accurately reporting on chemicals and their locations is highly contingent upon using valid data. Unforeseen issues arise from the use of incomplete or missing data, misclassified products, language and changing versions or an antiquated system of records. Not only does misinformation lead to increased safety risks within the organization, but it also creates liability throughout the downstream value chain and exposes companies to regulatory and reputation risks. Companies must do all they can to control or mitigate such risks.

It's a big issue!

According to a recent report from the European Chemical Agency controlling compliance

inspections to address the quality and management of the downstream users' own SDSs. Results from the evaluation of 4,500 SDSs demonstrated that 50 per cent of the checked SDSs had defects in the information provided. Much of this leads right back to the everchanging landscape of regulatory change and development in all Western economies, including Canada.

CPCA understands the regulatory challenges related to a moving target of regulatory change, which includes ongoing assessment of chemicals in commerce with a focus on helping members manage future risks related to human health and the environment. As these assessments are finalized there can be new requirements to modify the chemical compositions for terms of use/exposure thereby impacting a wide range of product formulations. A company must be fully aware of the evolving nature of chemical assessment for all aspects of chemicals in products and the potential for changes if and when they occur. Then it must take actions to ensure it is reflected in their hazardous communications such as SDSs, labelling and other mechanisms.

CPCA's main focus remains on whether or not chemical substances used in paint and coatings can remain in commerce at current use levels or whether new regulatory measures will be required and what they might mean for member companies. The last phase of Canada's Chemicals Management Plan alone includes assessment of over 500 substances used in CASE products, not to mention other regulations related to air quality, labeling, biocides, etc. Canada is among the most active on chemical assessment and re-evaluation, if not the most active, requiring CPCA staff to work closely with members to ensure risk assessment and risk management measures for those substances are reasonable and evidenced-based and, of course, communicated widely to members.

CPCA launched its CanadaCoatingsHUB in 2018, a one of a kind, comprehensive digital issue management platform for members, with a large number of resources on a variety of issues, including chemical management, VOC regulations, biocide re-evaluation, etc. To round out that offering CPCA has just added a new substance database to the Hub. It allows all members access to every substance used in commerce in Canada in a wide variety of paint, coatings, adhesives and sealants (CASE), all at their fingertips. It contains about 1,100 substances used in CASE products whether they are under review or not, allowing members to search each substance by their chemical number (CAS-RN). This in turn allows them to determine the current status for those substances in terms of uses and restrictions in Canada vis-à-vis human health and the environment. It also shows whether or not those substances are under regulatory review and at what stage in that review process. The latter part is where members are fully engaged with CPCA staff and via committees in support of a strong approach to accessing the data necessary to ensure those substances are properly assessed for the best possible outcome for industry.

CPCA will continue general member webinars on the benefits of the CoatingsHUBand individual member webinars to ensure all members can take full advantage of the HUB and to also provide any feedback for future improvements.

In this complex global business environment, there is sometimes little time to focus on the quality of all chemical data and few resources available to actually cross-check it all. The burden of keeping up with constantly changing regulations, processes, product lines,

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with core business processes used by member companies. CPCA is pleased to provide an added resource for our members on that front and will continue to update and modify, as needed, based on further member feedback.

Gary LeRoux President & CEO



CPCA REPORT

CPCA Substance Database Now Live

The Canada CoatingsHUB continues to revolutionize the way CPCA engages with members. Our role is to support members by providing access to the latest regulatory developments as they happen via the Canada CoatingsHUB. The NEW substance database is the last component of this NEW digital platform making it the only source for personalized and user-specific regulatory updates and information for the paint and coatings industry. The substance database is the final piece in a regulatory issue management system developed over the course of last year with a specific focus on substances known to be used in coatings, adhesives, sealants, and elastomers (CASE), with an at-a-glance overview of exactly where each substance of interest is in the Canadian regulatory review process. The database allows users to search, and review over 1,100 substances by CAS-RN, Group, Sub-Group, CEPA Toxicity Declarations and more. The core feature of the database are the individual substance pages that provide a step-by-step review of the status of a substance within the Canadian CMP Phase 1, 2, 3 and Post-2020, along with supporting documentation. An International Coatings Technology Provider stated: "You have something now that no other coatings association in the world can even begin to boast of as companies are extremely interested in regulatory information."

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to Industry Steward Organizations

CPCA has stated that it was crystal clear what the Environment Minister was directing, that 100 per cent of the surplus funds for paint waste recycling be returned without holdbacks of any kind, in escrow or otherwise. Those funds were accumulated in fees charged by Stewardship Ontario when it was operated by them before 2015, that is before Product Care took over operations. It was also crystal clear in the Ministerial Direction, that should there be unexpected costs beyond the \$7.2 million in the General Wind Up Reserve, already contributed proportionately by all stewards including the paint industry, those costs could be recovered from ALL the stewards including ISOs operating independent of Stewardship Ontario for years. Why that huge reserve was ever permitted is still unclear as the independent steward organizations get no services from Stewardship Ontario whatsoever, and has not since before 2015, but has to pay huge windup costs for the few materials that are left under their management. For paint that represents approximately 30 per cent of the Reserve.

Recent weeks have seen major attempts by Stewardship Ontario to hold-back more material-specific surplus funds that were overcharged paint stewards pre-2015 to be used for windup costs that have never been detailed to any degree. Lack of transparency was one of the key issues why paint stewards left Stewardship Ontario in 2015 along with the challenges related to governance and lack of efficiencies. Since moving to Product Care we have seen a 30 per cent increase in efficiencies while still meeting and exceeding paint recycling targets in Ontario since.

The surplus funds transfer to Product Care, as the ISO for two ISPs, must include 100 per cent lump sum transfer as noted in recent numbers provided by Stewardship Ontario as at March 2020, namely Stewardship Ontario's actual surplus number of \$16,370,900, not the \$15,604,300, which was only a rough estimate included in the windup plan that was approved. Clearly those numbers were determined after year-end and that is understandable, but it is also clear that they constitute the surplus amount to be transferred to the ISO.

There have been a number of unfortunate delays due to different views of the surplus transfer held by Stewardship Ontario most recently with Stewardship Ontario delaying the transfer another three months for no valid reason given that all government workers and consultants hired by SO to participate in the windup are still employed. There still remains a number of issues as to what windup entails given that Stewardship Ontario has only one remaining steward under their operations. It is important that Stewardship Ontario execute the recent Ministerial Direction on the 100 per cent lump sum surplus transfer, which must be based on the 'actual' surplus amount recently revealed by SO. This will prevent further delays by Stewardship Ontario beyond the proposed windup deadline, which all stewards want which the and is in best interests of waste recovery and the environment. Stewardship Ontario is an industry funding organization and as such, it is supposed to act in the interests of its stewards, past and present, we remain

The US EPA Releases Draft Risk Assessments for Five Isothiazolinones

On May 14, the U.S. Environmental Protection Agency (EPA) released its draft risk assessments as part of registration review of several antimicrobials used as preservatives in paints and coatings. Regarding OIT (octhilinone), an isothiazolinone commonly used to preserve paints and coatings, EPA raises concerns for inhalation and dermal exposure for both occupational use (application of paint) and residential / consumer use (application of paint), except for occupational brush / roller application for inhalation exposure. ACA is coordinating with the American Chemistry Council (ACC) and the Household and Commercial Products Association to develop comments due to EPA by the July 13 comment deadline. CPCA will support the comments. ACA/CPCA sent a letter to US Canada RCC officials to inform them of a new potential situation of misaligned biocide regulations that will arise from this recent US EPA initiative that needs to be dealt with under WorkPlan C of the RCC Work Plans for 2019-2020 published earlier this year.

WCC Members Updated Association Efforts Related to the Pandemic

CPCA informed the World Coatings Council (WCC) that an economic impact update of the coatings sector was done in Canada in April, under Orr & Boss, to get a better idea of where things were and where they might be at year-end. While it showed significant downturn for Q1 and Q2, it did point to some promise for year-end. CPCA also conveyed to all government the essential aspect of all coatings products (see #essential coatings via the CPCA social media platforms). In the US, ACA continues to track COVID-19 related actions that impact the industry on a dedicated resource page. Up-to-date information on the economic value of the paint and coatings industry, as an essential product, was posted. In the UK, the British Coatings Federation (BCF) published a Coronavirus Hub and 16 case studies as part of the BCF essential coatings campaign. Professional decorative paint sales were down 50 percent in April, and industrial coatings were down 30 percent. In Mexico (and throughout Latin America), an excellent communication work was done by ANFAPYT to address the impacts and positive responses of our industry during the pandemic. In New Zealand on May 14, while borders are still closed, the government is moving down to level 2 on the COVID-19 alert system, meaning that all member paint companies can open as long as they follow the rules! It requires everyone, workers, contractors and customers, with cold or flu-like symptoms to stay away from company premises, to keep customers 1 meter apart and to disinfect all shared surfaces. In South Africa, the situation was still at Level 4. SAPMA and many members have requested to increase work force of manufacturers to 33 per cent (as opposed to 20 per cent) to cater for the small to medium manufacturers and to open raw material and services providers so that they can supply the manufacturers. Paint retailers (only mentioned in level 3) were not opened (hardware stores are open for the supply of essential services and emergency practitioners i.e. not paint.



Please consult the CPCA Coatings/HUB for more details on each topic.

MEMBER RECOGNITION

Dow Places 22nd on 2020 Top 50 Companies for Diversity List

Dow reports that its placement on the list for the third consecutive year showcases its commitment to inclusion and diversity (I&D) as a business imperative.

PPG's Shanti Swarup Recognized by ACS, Pittsburgh Intellectual Property Law Association

PPG announced that Dr. Shanti Swarup received the 2020 Polymer (POLY) Fellow Award and Division of Polymeric Materials: Science and Engineering (PMSE) Fellow Award from the American Chemical Society (ACS).



CPCA Monthly Report on M&A and Distribution Agreements, Available on the Canada CoatingsHUB (Members Only)

SUSTAINABILITY

Whirlpool Corporation, Dow, and Reynolds Consumer Products Collaborate to Manufacture and Donate Much-Needed Respirators through WIN Health Labs, LLC

This collaboration to provide much-needed respirators to the heroic men and women in healthcare who are working on the frontlines to combat the spread of COVID-19. The joint project is a protective piece of headgear and respirator system that will be manufactured and sold through WIN Health Labs, LLC, in addition to an initial donation to hospitals. The personal protective equipment created by the joint team is a powered, air-purifying respirator, or PAPR, which takes the place of a traditional medical mask and visor and features a replaceable polyethylene hood. The clear hoods are both flexible and comfortable, and can quickly be replaced between patients.

Celanese Launches Sustainability Page on Celanese.com

The launch of *Sustainability* on Celanese.com underlines an Environmental, Social and Governance (ESG) focus on the Celanese culture of stewardship, inspired by the company's vision of improving the world and everyday life through its people, chemistry and innovation. Celanese began this new decade looking ahead with increased attention on a sustainable future while continuing to take great pride in its successful past 100 years

Clariant Raises the Bar for Sustainable Coatings Solutions with New Additives, Dispersants and Pigments Now Available to the North

absorbers, low-foaming dispersing agent and a pigment to deliver sustainable coatings solutions.

MAPEI's Sustainability Manager Recognized as a 2020 Coverings Rock Star

The Coverings tile and stone trade show recently announced the 14 winners of its 2020 Rock Star awards, including Brittany Storm, MAPEI's sustainability manager.

BASF, DiDi Partner to 'Reshape' Car Sharing Industry

BASF and the mobile transportation platform DiDi in China signed an agreement to provide sustainable refinish coatings solutions and technical services to Didi's body and paint shops and develop the carsharing industry in and out of China.

Painting a Greener Future – New Raw Materials, R&D for Coatings and Inks

Bio-based and environmentally friendly coating raw materials and additives are now well established in the coatings and adhesives industry! There are certainly several bio-based raw materials available in the market and each year we see more and more ingredients being launched. The complete supply chain is now stepping up its efforts to develop raw materials derived from bio or renewable sources.

TECHNOLOGY & INNOVATION

Research Engineers Develop Innovative Process to Paint 3D-printed Objects

Research engineers at Rodgers have created a novel method to paint 3D-printed objects, such as lightweight frames for aircraft and biomedical stents that could save manufacturers time and money and provide new opportunities to create 'smart skins' for printed parts.

Detailed Study on the Effect of Exposure Conditions on Dirt Pickup Resistance for Exterior Paints

Scientists report the dirt pickup resistance results for 26 commercial exterior paints exposed at four different locations and the results of a subsequent study of ten commercial paints at two exposure locations.

Progress in Biomimetic Leverages for Marine Antifouling Using Nanocomposite Coatings

This review provides systematic evidence of the effect of structurally folded nanocomposites, nanofiller tectonics, and building blocks on the creation of outstanding superhydrophobicity, self-cleaning surfaces, and potential antifouling coatings. The development of modern research gateways is a candidate for the sustainable future of

Recent Developments on New Smart Anti-COVID Coatings, Surfaces or Technology to Reduce COVID Propagation

HKUST Develops New Smart Anti-Microbial Coating in the Fight Against COVID-19 which inactivates up to 99.9% of highly-infectious viruses. Kastus' Antimicrobial Surface-coating to be effective against the human coronavirus on treated glass and ceramic Surfaces. BenGourion University research team develops anti-coronavirus surface coatings incorporating copper nanoparticles which strongly block infection of the cells by the coronavirus. See info also a new system to open doors without using the handle and a new patented aluminium surface with microspores filled in with biocide agents that can be recharged, a project funded by Rio Tinto in Quebec.

Silver Nanoparticles as Biocidal Agent in Polyurethane Coating

The effect of silver nanoparticles in terms of yellowing and gloss variation was evaluated by a UV-B radiation test. Silver nanoparticles had no effect on the gloss and yellowing paint film. In addition, positive results were obtained for the protection and resistance against bacteria but not satisfactory resistance against fungi.

Additional technology reports

COVID-19 Should be Wake-up Call for Robotics Research

ECONOMIC NEWS

Manufacturing Sales Hit Hard by the COVID-19 Pandemic

Manufacturing sales plunged 9.2 per cent to \$50.8 billion in March, the lowest level since June 2016 and the largest percentage decline since December 2008. Ontario accounted for the lion's share of the national decline. Sales tumbled by over 30 per cent in both motor vehicle and parts.

Deloitte Canadian Economic and Financial Forecast, May 2020

Real gross domestic product is expected to contract by over 50 per cent in annualized terms during the second quarter. The reopening will be staggered and economic activity will remain weak throughout the summer. Deloitte expects momentum to build later. Despite the strong gains, which will last into next year, the firm does not expect the level of economic activity to reach its pre-COVID-19 level until early 2022.

C&EN's Top 50 US Chemical ppoducers for 2019Dow, Exxon

Mobil, LyondellBasell Industries and DuPont lead Chemical & Engineering News' annual list of global chemical companies by revenue. The latest ACC revised forecast for 2020 is a 3.3 per cent drop in US chemical volumes for the year.

pandemic impact.

S&P Launches ESG Scores & ESG Disclosure Issues Are #1 Engagement Topic Among Worldwide Companies

T. Rowe Price reported that environmental, social, and governance (ESG) disclosure issues became the number one topic in its engagements with the managements of companies around the world in 2019. Last March, institutional investors unanimously confirmed that ESG risks and opportunities played an increasingly important role in their investment decisions and their evaluation of portfolio companies during the past 12 months. S&P Global recently announced the launch of its S&P Global ESG Scores with coverage of more than 7,300 companies, representing 95% of global market capitalization.

Canadian Economic Indicators

- Sixty Percent of Metropolitan Housing Starts to Remain Negative Short-term and Long-term
- Car Sales Tumble 74 per cent in April
- EDC: COVID-19 and the Auto Sector

Additional Readings

- EU/Mexico Sealed a Trade Deal
- Europe's Top 25 Coatings Manufacturers in 2020
- A Practical Guide to Distribution Agreements
- COVID-19: What Employers Need to Know About Screening Employee
 Temperatures



Please visit the CPCA CoatingsHub for additional news in the Management Information Resource.

INTERNATIONAL NEWS

- **2020 Profiles:** Disruptive Innovations in Coatings for Automotive and ACE Applications, Innovations & Growth Opportunities in Anti-Corrosion Coatings, Graphene-Based Coatings, and Sealants
- From 2020 to 2025: See recent market report publications for Paints & Coatings, Residential Architectural Coatings, Latest Research on Exterior Wall Coatings, Epoxy Adhesives, Biomedical Adhesives and Sealants, Electrically Conductive Adhesives.
- From 2020 to 2026: See recent market report publications on Aerospace Sealants, High Temperature Adhesives and Sealants Industry, Impact of COVID-19 on Hot



Open the Monthly Report on International Market Research for the Paint and Coatings, Adhesives and Sealants Industry.

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