

# INSIGHT

CPCA'S ANNUAL GUIDE & DIRECTORY 2021



CANADIAN PAINT  
AND COATINGS  
ASSOCIATION

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





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CANADIAN PAINT  
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DE L'INDUSTRIE DE LA PEINTURE  
ET DU REVÊTEMENT

# HELPING YOU **COVER** THE WORLD

One of Canada's oldest not-for-profit industry associations, founded in 1913, the Canadian Paint and Coatings Association is the ONLY trade association advocating for the specific interests of the coatings industry in Canada. CPCA represents Canada's leading paint and coatings manufacturers and their industry suppliers in the primary product categories of architectural paints, industrial finishes and automotive coatings.

The coatings industry is one of the most heavily regulated sectors in Canada's economy. CPCA's core competency focuses not only on high level government policy impacting its members, but also provides proactive approaches on legislative and regulatory development on critical issues such as chemicals management and hazard communication, product stewardship and sustainability, toxics reduction policy, air quality regulations, chemical safety in the workplace, science-based chemical assessment, and improved regulatory alignment.

*To learn more about CPCA visit [canpaint.com](http://canpaint.com)*

## CONTACT US

*For more information on how to become a CPCA Member.  
We're here to help.*

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CPCA's annual Insight: Guide & Directory is provided to all members and sent to more than 3000 of CFCM Magazine's subscribers in the paint and coatings industry throughout North America.

## MANUFACTURER MEMBERS

Manufacturer members manufacture a wide variety of paint and coatings in the architectural, automotive and industrial segments.



Have more than 230 paint manufacturing establishments in Canada



Own and operate more than 3,000 retail stores in Canada



Supplies another 5,000 retail stores with paint and coatings products



Supply coatings to more than 7,500 OEM's and auto body repair shops

## SUPPLIER & DISTRIBUTOR MEMBERS

Our supplier and distributor members are an important part of the paint and coatings value chain providing goods, services and equipment supporting a wide range of products for paint and coatings as well as adhesives and sealants.

## AFFILIATE MEMBERS

These companies are also important to the industry with respect to the application of products, stewardship and recycling of paint and generally have an economic interest in the welfare of the coatings industry and the people working in it.

## ECONOMIC IMPACT

### Adding Value to Canada's Economy

The paint and coatings industry includes a wide range of coatings, adhesives, sealants as well as elastomers, commonly referred to in the sector as CASE products. The industry is an important and dynamic part of the nation's economy with a pivotal role in protecting and preserving a vast array of assets and manufactured products.

Coatings extend the life-cycle of Canada's most critical infrastructure, equipment and consumer products in multiple end-use markets:

construction, automotive, oil & gas, mining, wood and metal products, aerospace, machinery, paper, metal containers, coil, transportation equipment and general industrial manufacturing.

The industry continues its massive investments in research and development (R&D) generating many innovations and new technologies in product formulations. A strong coatings industry is critical to maintaining and improving Canada's overall economic performance and that strength is reflected in the contribution to Canada's Gross Domestic Product and the many jobs created.

## CREATING VALUE FOR CANADIANS



**125,316**

Direct, Indirect & Induced Employment



**\$1.74B**

Total Taxes Collected



**\$4.65B**

Total GDP for CASE



**\$8B**

Wages & Salaries



**\$12.3B**

Economic Output

# INSIGHT

## CPCA'S ANNUAL GUIDE & DIRECTORY 2021

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## A YEAR IN REVIEW

### CHAIR'S MESSAGE

No one will deny that 2020 is a year for the record books. As with many new challenges faced by industry on a daily basis no one ever expected a complete shutdown of the economy. Companies in the coatings industry have faced those challenges head on as they had little choice during a pandemic. I am pleased to say that the coatings industry has risen to the occasion as both manufacturing and retail operations continued throughout the lock-down across Canada with strategic adjustments for retail such as curbside pickup and delivery. At the same time every effort was made to protect workers who were able to continue working throughout the lock-down and during the current reopening. We remain hopeful that all our members will make up much of the lost business during lock-down and continue to protect the workers we rely on to sustain our operations. I am sure I speak for all our members in thanking our employees for their patience and support during these difficult months.

The association also adjusted to the pandemic with staff and members continuing their support of the association's work throughout. First and foremost, the association was pleased to be able to provide a 30 percent discount for 2020 membership dues, as a concrete contribution supporting members during a difficult time. We appreciate the positive feedback from members for such an initiative. There was an extensive effort made to inform members of the various Government actions to support industry, both the funding support and information to help our companies in matters of health and safety during the pandemic. The association ensured the coatings industry was designated as essential during the lock-down so that member companies could continue production as well as limited retail sales for the many corporate-owned stores and the many stores supplied by our members. In March we were pleased that the federal Government's security department, Public Safety Canada, designated 'paint and coatings' as essential support for a number of critical industry sectors such as construction, building/repair and maintenance, including medical devices requiring coatings, including ventilators.

The association was able to cover overhead and allow staff to work from home because of sound financial management over the past number of years. This helped provide a dues reduction for members while at the same time manage ongoing operating costs for the balance of the year. CPCA was also able to take advantage of the wage subsidy given the 30 percent reduction in revenues over 2019 met the eligibility requirements for it. Association staff was able to continue working full-time on the many important files on behalf of members in concert with the various committees and via online meetings and webinars with members, government officials and stakeholders. The board is pleased with how the association rose to the occasion in difficult times and appreciates the understanding of members in staying the course and supporting CPCA in its efforts to respond to, and comply with, government related requirements



such as mandatory data surveys and other critical information required to advocate successfully for the paint and coatings industry in Canada.

I would like to thank the staff for continuing to support the membership during these trying times as well as my fellow board members as we navigate our own businesses and share best practices as needed. I look forward to engaging with the board and CPCA members in the coming months as we have done over many years in the association. We will get through this difficult period and our businesses will prosper in the years ahead as we move toward a vaccine and complete reopening of the economy.

Sincerely,



Tim Vogel, CPCA Chair  
Chair and CEO, Cloverdale Paint



# Cloverdale Paint

## PROUD MEMBER OF THE CPCA

CANADIAN PAINT AND  
COATINGS ASSOCIATION



ASSOCIATION CANADIENNE DE L'INDUSTRIE  
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## A YEAR IN REVIEW

### PRESIDENT'S MESSAGE

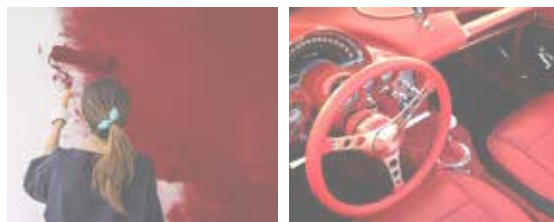
This past year was off to a good start and then pandemic applied the brakes for everyone. This had us all working from home while every effort was being made to ensure CPCA could support members during the lock-down. First and foremost, the association wanted to ensure members had immediate and timely access to Government actions and initiatives supporting industry. A portion of the CPCA website was dedicated to sharing information with members and bulletins were sent almost daily. The key advocacy work of the Association was to ensure the paint and coatings industry was designated 'essential' and could continue operating during the lock-down. CPCA reached out to the federal Government and was successful in ensuring Public Safety Canada included the coatings industry under essential services, as follows: ***"Workers who support the supply chain of building materials from production through application/installation, including cabinetry, fixtures, doors, cement, hardware, plumbing, electrical, heating/cooling, refrigeration, appliances, paint and coatings, and employees who provide services that enable repair materials and equipment for essential functions."*** Provincial Governments followed the federal lead and captured the essential nature of coatings in its various lists of essential services for products used for maintenance, repair and included ***"businesses that manufacture inputs to other manufacturers."***

CPCA continued working on a number of critical files including addressing the ongoing challenges on biocides used for in-can and film preservation. CPCA initiated discussions on the creation of a paint and coatings working group to focus on ensuring accurate and robust information for the ongoing re-evaluations of the remaining paint biocides for paint formulations. This new working group will include senior officials from PMRA, manufacturer and supplier members of both CPCA and ACA, representatives of the US EPA and representatives from the Canada-US Regulatory Cooperation Council. This will ensure there is full attention paid to alignment and that relevant data is provided in a timely manner ensuring decisions are taken based on strong data and sound science. The paint industry cannot lose more options for paint preservation in Canada, which seems to be a trend that is unique to Canada. By doing so it will ensure the integrity of low VOC water-based paint products for consumers, which can then continue to be recycled in Canada as it has been for many years.

Amendments to architectural paint regulations for 53 categories will begin again in Canada very soon. Consultations have begun on adjusting the VOC limits enacted in 2009. There is also the possibility that 10 new categories will be added in the regulation. There will be work to do in the coming months to ensure full engagement on possible new limits and the potential impacts for industry. Assessment of chemicals in commerce continues with the current government likely to bring forward amendments to the Canadian Environmental Protection Act in the coming weeks. If stricter approaches to the assessment of chemical substances is the way forward in Canada there will likely be an increase in bans and use restrictions for chemicals in commerce. The Association and industry generally must be vigilant if and when amendments to the Act are tabled as it could drastically limit the chemicals now used by industry. Please see updates on the ongoing risk assessment and risk management measures for chemical assessment in this edition of Insight and full details on the Canada CoatingsHUB.







To assist with these issues noted above, early in 2020 CPCA added an important feature to its digital platform, the Canada CoatingsHUB. It is a comprehensive chemical database of more than 1,100 substances used in thousands of coatings, adhesives, sealants and elastomers sold in Canada. CPCA members can search the new substance database by chemical number (CAS-RN), providing them with substance-specific information, as and when needed. It provides 'at-a-glance' views of the status of chemical substances of interest in Canada. The Canada CoatingsHUB contains all the background resources and links on chemicals in paint and coatings indicating if risk management actions will be taken for certain substances.

For the first time in CPCA history the association added to its core competency of regulatory development and compliance and launched a DIY site for paint and coatings, called Paint-it-Yourself (PIY). This site highlights the many features of CPCA manufacturer member products and how they benefit consumers for interior and exterior uses. The hope is that this P-I-Y site will inspire the public to take action and purchase our members many product lines for their home-based projects. The site will be driven by a strong social media campaign to raise awareness of the many benefits of coatings products consumers might wish to consider and expect from CPCA member companies. The site is brand agnostic and it is left to the consumer to decide which CPCA member brand on our website best suits their needs or is closest to their neighbourhood for convenience.

Successful advocacy in 2020 also led to the reimbursement of \$15 million in surplus funds to all paint companies in Ontario, most of which was returned to CPCA members representing the largest volume of paint sales. This was from environmental recycling fees originally paid to Stewardship Ontario in overcharges levied on the paint industry in 2009-2015, but was never used for that intended purpose. CPCA continues to advocate for reasonable regulations flowing from the new waste recovery and circular economy Act in Ontario. These regulations will be finalized by June 2021. It is unclear as to what the Government's intention is for these new regulations, but it has stated that any new regulations must not add unnecessary administrative fees. Given the recent history in Ontario we must always remain focused on the way in which regulations are developed especially with respect to increases in fees.

As in the past, CPCA's Insight: Guide & Directory covers the issues addressed by the Association over the past year. It provides some sense of the challenges faced and the services provided by CPCA related to the strategic plan objectives as determined by the Board of Directors. While there were added challenges this year due to the pandemic, members can rest assured that CPCA did not miss a beat when it comes to the matters of most importance for our members. I would like to thank the Board, the staff and the many members who work on our Committees to get the job done for the paint and coatings industry in Canada.

Handwritten signature of Gary LeRoux.

Gary LeRoux  
President & CEO  
CPCA





“

We are witnesses to the resilience of the paint and coatings industry in 2020. The Covid-19 Pandemic was fraught with uncertainty and industry stepped up by providing frontline workers with critical supplies, maintaining employment for families, and supplying coatings products for the housing and construction industry and other sectors underpinning Canada's economic rebound.

CPCA BOARD OF DIRECTORS

# LEADING BY EXAMPLE

## BOARD OF DIRECTORS

The CPCA is governed by a Board of Directors made up of both corporate and supplier/distributor members, with three members coming from the latter. The Board meets four times a year and as needed to provide overall direction on policy for the association. There are two Board committees, one overseeing Audit and Finance and the other responsible for Governance and Nominations.



**Tim Vogel**  
Cloverdale Paint Inc.  
Chair of the Board



**Darrin Nobel**  
Home Hardware Stores Ltd.  
Governance Committee Chair



**Vince Rea**, PPG Canada Inc.  
Finance and Administration  
Committee Chair



**André Buisson**  
Société Larentide Inc.



**Bruce Clathworthy**  
DCC Lansco



**Doug Crabb**  
DUHA Group



**Andy Doyle**  
American Coatings  
Association



**Jon Housenga**  
OPC Polymers Canada



**Brent Jamieson**  
Axalta Performance Coatings



**Mark Huisman**  
BASF



**Sharon Kelly**  
KelCoatings Ltd.



**Adil Meziati**  
Sherwin-Williams



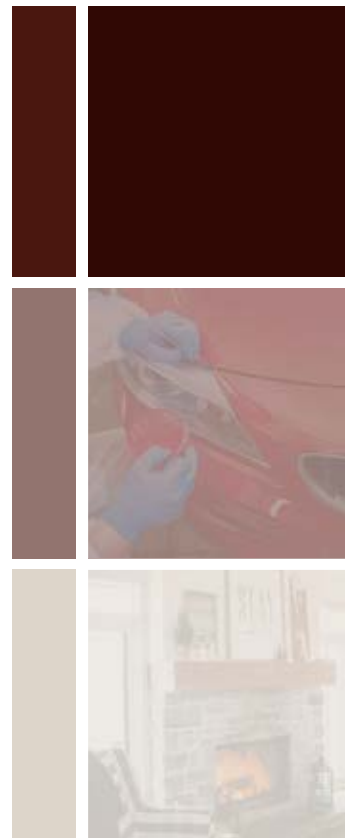
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**Jean-François Tanguay**  
IMCD



**Steve Veroba**  
Benjamin Moore



# THE CANADIAN PAINT INDUSTRY IN 2020 AND BEYOND

## BY THE NUMBERS

The shutdown of Canada's economy in the first half of 2020 plunged Canada into a deep recessionary coma, ten times the gravity of the last recession in 2008-2009. Spending by households fell across all major categories and new vehicle production was especially hard hit. As in other countries, federal and provincial governments have been focused on stimulus spending on both the supply and demand side, which will help the recovery in 2021, despite a record-high public debt across the spectrum.

CPCA advocated strongly for the paint and coatings industry to be designated as 'essential services' in all provinces in the early days of the pandemic. This was assured after the federal Government designated 'paint and coatings' as an essential service under Public Safety Canada. This helped maintain paint sales to some extent at the retail level and ensured the subsequent resumption of paint manufacturing once quarantine was gradually lifted. The widespread lock-down stimulated an increase in DIY paint sales but significantly reduced professional paint jobs and those that did continue were limited to exterior only. Meanwhile, manufacturers of industrial and automotive paint products experienced a significant sales slowdown. All paint manufacturers deployed special internal plans for a gradual return to more normal operational levels.

As most restrictions were lifted across the country by August, Canada's economy slowly continued to revive, as indicated by the recent employment surge. But at the time of writing there was the beginning threat of a possible second wave of COVID-19 into the Fall of 2020. If Canada can successfully limit the impact of a second wave and if a vaccination materializes before the end of 2020 or early in 2021, Canada's recession will be short lived, but still the deepest since the great depression. Fully restoring Canada's economy will take a much longer time given the massive debt accumulated by the federal government with 97 % of the total spending on the pandemic, including by the provinces, was provided by one level of government. This will result in a record-breaking deficit for fiscal 2020 of close to \$400 billion increasing Canada's overall debt to \$1.2 trillion up from just under \$700 million pre-pandemic.

In this time of uncertainty, the recovery rate of the Canadian economy and the global economy is hard to predict. It depends on numerous socio-political, financial and health scenarios. We opted for the most optimistic scenario, which is that Canada will be able to emerge and rebound in 2021 in what is being referred to as the "90% economy" by The Economist magazine. This means that worldwide GDP fell by 10 percent and by comparison the worldwide GDP fell by less than 1% from 2008 to 2009 during the Great Recession, which took a number of years to rebound fully. It may be too much to expect a quick and full recovery from a 10% GDP deficit in a shorter period of time. This may not be the case for the Canadian paint and coatings and adhesives, sealants and elastomer (CASE) sector given that the industry has been deemed an essential service for a wide range of industries and less likely to be impacted overall in comparison to other industries like natural resources, aerospace, tourism, personal services, etc.





## The Industry in 2019 and First Half of 2020

The total Canadian paint and coatings market was 482 million litres and \$3.446 billion in 2019. The volume of the market declined by 0.2% in 2019 while value growing by 2.5% due to price increases. However, the automotive segment did not have a stellar performance compared to 2018. Before the impact of the pandemic, experts expected the CASE market to grow at a volume of 2% and 4% in value for the year. It appears that only a few CASE segments were profitable during the lock-down prior to the late Spring relaxation of restrictions such as the DIY Architectural and Packaging coatings. Supply chain risks also shifted during the Covid-19 pandemic and this trend is expected to continue. A number of difficulties are likely to emerge such as raw material supply shortages or significant delivery delays, loss of business partner sites or locations, loss of skilled workers, distress caused by ownership changes and customers, trade tariff barriers, and the potential for force majeure measures due to additional pandemic spikes, and finally, climate change challenges or political upheaval. Strategic corporate risk management will be more critical than ever over the next several years, as priorities will be constantly readjusted due to inevitable supply chain shifts en route to a "new normal," whatever that may be with respect to asset management and human resource impacts.

## Current CASE Numbers

By the end of Q2, as lock-down restrictions are lifted across all regions in Canada, year-to-date Architectural paint and coatings sales experienced growth in the order of 5% in value and 3% in volume. Sales have increased most in Atlantic and Western Canada, where the pandemic had the least impact. Meanwhile, the Automotive Refinish paint and coatings market showed a drop in the order of 14% percent in both value and volume, since its performance is closely tied to record low accident rates and total number of miles driven. The industrial maintenance and protective coatings consumption, which is directly tied to construction, and also to maintenance of medium- and heavy-duty facilities such as oil and gas and marine shipbuilding, displayed negative volume trends in these particular segments. The industrial oil and gas CASE products hit historic lows in sales. The latest year-to-date statistical values for the entire paint and coatings and adhesives and sealants sector from Statistics Canada indicated an increase in sales value, mainly due to a strong first quarter, strong Architectural sales and price increases which had to be incurred and passed on to customers.



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**Benjamin Moore**





# CANADIAN COATINGS INDUSTRY

## 2020-2021

### 2020 Forecast

Economists now forecast that the 2020 Canadian GDP will decline by 5.3 percent. However, it is expected to rise by 3.1 percent in 2021 versus 2020, so the economy will still be under contraction. Weak domestic and global conditions will be a drag on manufacturing output, more especially on the industrial and automotive side, and will directly affect the manufacturing shipments of CASE products. Sadly, the overall Canadian manufacturing sector's share of GDP has been shrinking in recent years — falling to 10.2% in 2019 from 15.7% in 2000 — and could even shrink further in the absence of favourable 'buy local' programs or other Government of Canada incentives supporting the revitalization of Canadian SME manufacturing. In June 2020, the whole manufacturing sector was still operating 12% below average. Experts believe that Canadian CASE manufacturing shipment values should be stable at best, or even decrease in 2021 as a result of continued mergers and acquisitions, more relocation of plants and continued regulatory pressure in the chemical sector. Nevertheless, all paint and coatings sales volume (shipments + imports), which declined by about 5% in Q2 2020 alone, should recover in the second half of 2020 for a total decrease in the range of only +1 to 3% for the full year.

### 2021 Forecast

The economic recovery is expected to be more widespread across all industrial coatings segments in 2021, although some segments and some regions of Canada may suffer more than others. Canadian non-residential business investment will likely not recover completely from what it was before the onset of the pandemic. Meanwhile, non-construction industrial projects should gain strength. Even the cutting-edge aerospace industry should regain some momentum in the second part of 2021. The construction sector, which has mostly continued to operate near capacity in 2020, will remain solid next year with a return to household spending and higher consumer confidence. During the peak of the pandemic, the aggregate household savings rate shot up to 28.2 per cent (compared to 3 percent in 2019), so these savings will likely generate more consumer spending in 2021. Oil prices are expected to remain below \$30-40 USD per barrel, which will limit increases in raw material prices and stimulate the transportation sector.

The architectural segment will be among the CASE winners next year, which accounts for 60 percent of the volume and nearly 50 percent of the total value of the entire Canadian industry. In the construction segment, with a gradual return to work, the DIY/Pro activity ratio is expected to decrease in favour of increasing professional contractor activity. Among the CASE losers will be the automotive OEM and refinish, marine, oil and gas, aerospace, rail rolling stock, and machinery and equipment segments. The business landscape will see significant transformation in these particular segments. The performance of the wood coatings industry will strongly depend on the vitality of the commercial and residential construction and renovation sector and Canada's brick-and-mortar business next year.

In 2021 the North American paint and coatings manufacturers will continue to experience solid and even increasing online sales, as all clients will continue to

minimize risks related to on-site visits in favour of online deals. A large number of employees will adopt telework and companies will strive to strengthen robotic production, automated warehouse delivery processes and the deployment of advanced online marketing strategies. This will be especially true if the new antiviral drugs and vaccines worldwide are found to be less than 100% efficient and/or will not be readily available to all. The main question is: Will this gradual decline in corporate and retail "brick-and-mortar" approach continue in the years to come in the new normal? Only time will tell. In this context, market research experts foresee a stronger demand for anti-viral/antibacterial coatings and allied

products, which should gain stronger momentum in 2021 and for several years thereafter. This particular coating segment will certainly be one of the strongest CASE product winners coming out of the pandemic.

## CPCA's 2020 Statistical Tables for Members

CPCA releases quarterly statistics for members only on paint shipments as well as import and export figures based on Industry Canada data to help inform members on important industry trends in all coatings sectors in Canada.



*Members can Download the Statistical Tables on the HUB!*

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“

The architectural DIY market has remained strong, residential construction activity has returned to pre-pandemic levels, and manufacturing activity is returning a bit faster than anticipated.

ORR & BOSS

# CANADIAN PAINT AND COATINGS MARKET UPDATE

## LOOKING AHEAD

By Douglas Bohn of Orr & Boss Consulting Incorporated

In April, Orr & Boss provided the CPCA an update on the Canadian coatings market. Given the up and down nature of the year, we are updating our estimate for 2020 and our forecast for 2021. In general, we are slightly more optimistic about the Canadian paint and coatings market. The architectural DIY market has remained strong, residential construction activity has returned to pre-pandemic levels, and manufacturing activity is returning a bit faster than anticipated (although it is still down on a year over year basis).

### 2020 Estimate and 2021 Forecasts

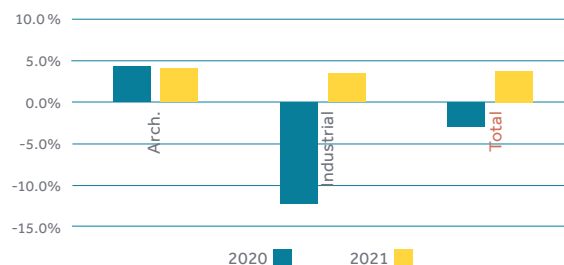
For the year, we expect both total volume and value to be down about 3% in 2020 before rebounding next year and growing in 2021. We expect volume to be up 3.5% and value up 6.1% next year. But this recession and economic recovery have been very uneven so these overall values hide some very significant differences in the market. The largest segment of the Canadian paint & market is architectural coatings and it has had a good year. We expect architectural coatings to be up 4.3% in volume and 7.1% in value this year. Whereas we expect all other Non-Architectural Industrial Coatings segments to decline by 12% in volume and 13% in value this year.

The [chart to the right](#) graphically depicts these values.

The [table below](#) provides the segment values for 2019, 2020 estimated values, and 2021 forecasted values.

#### 2020 and 2021 Volume Growth

Source: Orr & Boss Estimates



#### Volume (Millions of Liters)

#### Value (Millions of \$CNDs)

	2019	2020 E	2021 F	2019	2020 E	2021 F
<b>Architectural</b>	271	283	294	1,715	1,838	1,950
<b>Auto OEM</b>	36	25	28	344	250	286
<b>Automotive Refinish</b>	14	11	11	317	255	273
<b>IM &amp; PC</b>	32	29	27	227	208	202
<b>General Industrial</b>	36	32	33	221	202	215
<b>Industrial Wood</b>	35	33	34	202	196	206
<b>Coil</b>	16	15	16	134	130	136
<b>Powder</b>	18	16	16	103	94	100
<b>Packaging</b>	15	16	16	72	75	78
<b>Other Transportation</b>	8	6	7	80	63	68
<b>Marine</b>	2	2	2	31	31	32
<b>Total</b>	482	468	486	\$3,446	3,342	3,545





## Segment Reviews

As mentioned on page 17, architectural coatings is the largest segment within the Canadian coatings market and it has been doing relatively well this year. As homeowners have stayed home and are not spending money on travel, restaurants, and other entertainment options, they have been focused on upgrading their homes. We are expecting the DIY market with Canada to grow by about 12% this year. The DIY market increased significantly at the start of the lock-downs. It has since leveled off and is returning to more normal levels of growth. As evidence of this trend in the DIY sector, the Google Trends data shown below show a significant increase in searches for paint in Canada. It has since leveled off and the difference is not so great.

## Conclusions

This year has been a difficult year for many in the coatings industry, especially those companies supplying the non-architectural or industrial coatings markets. But we believe that the worst is behind us. We expect construction and housing activity to remain relatively strong and manufacturing activity to gradually return to pre-pandemic levels. Also, there continue to be opportunities in the coatings markets. Antimicrobial and Anti-viral coatings are growing. Also, coatings used on outdoor equipment like fishing, camping equipment, and other sporting good equipment are growing as is products used in construction markets. Assuming that another lock-down is not needed, Q4 should be a better quarter for all involved in the market and the industry should see growth in 2021.



*Full member details on the full update by segment can be found on the HUB.*



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# SUPPORTING REGULATORY DEVELOPMENT & COMPLIANCE

## CANADA COATINGSHUB

The Canadian Paint and Coatings Association (CPCA) recognizes the growing challenge of staying up-to-date on the regulation of substances used in the coatings industry in Canada. The industry is a heavily regulated sector, and navigating the regulatory landscape can be complex. CPCA's job is to support members by providing access to the latest information available on current regulations, policies and legislation — and those looming on the horizon. To be forewarned is to be prepared.

We know that legislative and regulatory data is essential in business operations, including for product development, plant operations, worker safety, environmental sustainability, product performance and cross-border shipping. Access to this kind of data helps companies make better decisions across the full range of a company's business processes.

In order to manage and mitigate risk, and to make sound business decisions, industry leadership must also have access to data related to marketing, sales, supply chains and distribution channels. This is why CPCA developed the Canada CoatingsHUB for manufacturers and raw material suppliers shipping or producing products in Canada.

### How the HUB was Created

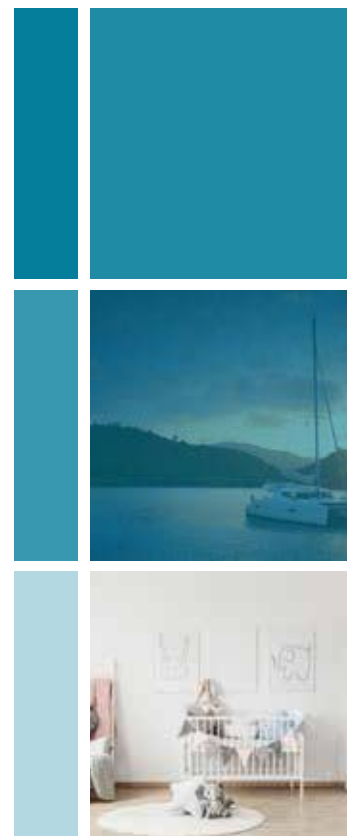
In 2019, CPCA embarked on a digital modernization effort that saw its entire public-facing website rebranded and redesigned. More importantly, CPCA sought to create the first-of-its-kind "digital issues management platform" to provide members with real-time data on regulatory development and a wide range of issues impacting industry. The HUB was developed by CPCA staff, along with a team of experts analyzing data, structure and the overall requirements for digital transformation. The result is an online platform providing maximum value for its users, expertly curated and searchable on all digital devices.

CPCA member companies can now access the HUB to extract relevant management information from vast amounts of unstructured data generated daily by government entities, including a very large and critical regulatory component on chemicals management and hazard communication.

### What the HUB Offers

The primary objective of the HUB is to allow companies to get their products to market, following all Canadian standards and regulations. The HUB allows members to navigate the Canadian regulatory world with ease, receive notifications on issue updates of importance for the sector, and search a comprehensive database on their own time. Users have access to a fully customizable dashboard. They can manage issue notifications from their personal profile, receiving prompt updates when they are posted.

A major component of the HUB includes access to existing regulations on specific chemicals, whether they are additives for enhanced product performance or biocides used for in-can/film preservation. Regulatory requirements allow those chemicals to remain in commerce by dictating specific use levels, clarifying use restrictions, benchmarking exposure limits, and detailing other critical components that determine the final product formulation. Searching for such data on the internet — even on reputable government sites — often leads to frustration and confusion.



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The HUB also provides members with quick access to industry-specific issue updates, formal industry positions and submissions, a compliance calendar, member notifications of pending government actions, and much more. It is a quick and accessible resource for companies to help them understand or confirm the status of a commercial chemical in Canada, one that may be used in a wide range of product formulations.

### New Chemical Substance Database

The HUB recently added a new feature for the benefit of member companies – a database of more than 2,000 substances used in thousands of products in Canada. This includes information on commercial chemicals used in the coatings, adhesives, sealants and elastomer (CASE) sector. CPCA members can search our new substance database by chemical number (CAS-RN), providing them with substance-specific information, as and when needed. This provides an 'at-a-glance' view of the status of substances of interest in Canada.

The new substance database also indicates whether or not the chemical is being assessed or re-assessed by government, and at what stage in that process. This means a company supplying or shipping raw materials or manufacturing finished products in Canada can immediately search the substance database to determine current compliance requirements for critical product ingredients. The

HUB also provides an opportunity for the company to provide direct input in cases where those substances are being assessed or re-evaluated. That input helps determine or support the existing status of chemicals in products, thereby ensuring they will continue in commerce by not negatively impacting human health or the environment.

### A Digital Platform Like No Other

The Canada CoatingsHUB is revolutionizing the way CPCA engages with its members. No other digital platform provides such a comprehensive resource on chemicals in paint and coatings, setting the Canada CoatingsHUB apart from other offerings on the market. With so many unique resources available, the HUB is proving to be one of the most robust, rigorous and relevant online tools for issues management today. Recently, after reviewing the Hub, 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."*

### Working for You

A review of the ongoing advocacy efforts of the Association over the past year reveals the level of engagement with industry, governments and stakeholders. Nothing is achieved without substantive and proactive engagement on the issues that matter for CPCA members.

## NUMBERS RELATED TO THE WORK OF THE ASSOCIATION IN 2020



**16**

Key Issues



**502**

Member Resources



**24**

Monthly Newsletters



**250**

Consultations & Meetings



**1067**

Tracked Substances



**267**

Committee Contacts



**53**

Member Bulletins



**65**

Official Government Submissions





“

At the forefront of CPCA's advocacy efforts are the needs of our membership. We never lose sight of that. CPCA was successful in securing 100% of the \$15 million in surplus funds for paint companies in Ontario. CPCA members are responsible product stewardship leaders providing consumers with an end-to-end life cycle framework for every paint product sold in Canada, for which they pay 100% of the costs.

TIM VOGEL, CHAIR, CPCA

# ISSUE MANAGEMENT & ADVOCACY

## CHEMICALS MANAGEMENT

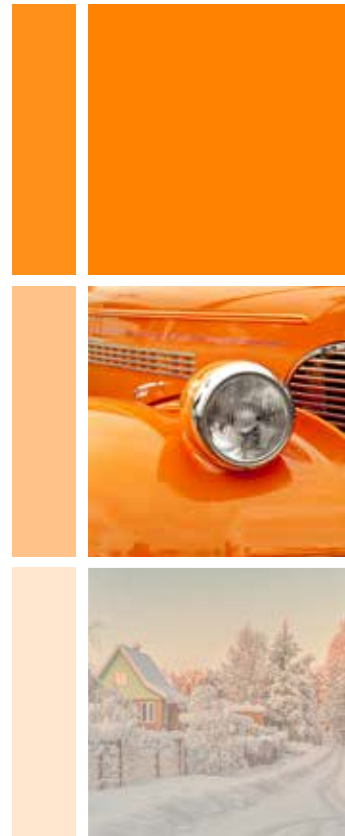
CPCA manages a wide range of issues on behalf of its members in the Canadian paint and coatings industry. These include four key areas:

- Chemicals Management
- Air Quality
- Extended Product Stewardship
- Environment, Health and Safety

Over the past several years these issues have become more challenging with respect to federal policy and regulatory imperatives of the current Government. Some of the challenges relate to the lack of harmonization with other jurisdictions such as the United States and the European Union. Others relate to either interpretation of existing policies that seek to assess chemicals through various lenses beyond what the current legislation intended and beyond the best placed Act for chemicals of concern. Still more challenges relate to the use of data to evaluate substances focused on inaccurate assumptions of higher use levels for substances in product formulations that are not science-based in terms of user or consumer use in the case of biocides. The bottom line for all these issues is the need for chemical assessments or re-evaluations of substances to be purely evidence-based. The current Government has maintained their sole approach to public policy and regulatory compliance is to be evidenced-based.

### CPCA NEW CMP Substance Database – Now Live!

The database contains 1,100 substances known to be used in the coatings, adhesives, sealants and elastomers sector (CASE) used in the industry out of the 4,300 substances categorized for risk assessment since 2006 under Canada's Federal Chemical Management Plan (CMP), in Phases 1, 2, and 3. It also captures those that are CASE-implicated among the 1,500 substances that will be prioritized for risk assessment in the Post-2020 phases. All these CASE-related substances were identified based on data obtained from CPCA members and from government information derived from various Section 71 mandatory information gathering initiatives under the Canadian Environmental Protection Act (CEPA) since 2006. As the federal government moves forward with further chemical assessment of chemicals in commerce, CPCA will continue to update the substance database for each chemical being assessed under the CMP. This ensures all information in the database is current and can easily be reviewed by members via the unique Canada CoatingsHUB digital platform.



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# CHEMICALS MANAGEMENT

## 2020 UPDATE ON CHEMICAL ASSESSMENT IN CANADA

There are still a number of outstanding substances being assessed in Canada's Chemicals Management Plan (CMP) from Phase 1 and 2 as outlined below and an update on substances under review in Phase 3 of CMP, which will likely move beyond 2020 due to the regulatory backlog created by the pandemic.

### CMP Phase 1

#### Bisphenols

A mandatory Section 71 notice will be launched for bisphenols in the fall of 2020, which would include Bisphenol S, possibly still used by some paint companies as a substitute of Bisphenol A (Batch 2 of the Challenge).

#### MEKO Update

CPCA has worked with members over the past two years on Health Canada's efforts to verify compliance with the Code of Practice for MEKO, five years after its publication in the Canada gazette. The federal government launched a national survey on MEKO and Ethylbenzene in the spring of 2019, followed by ongoing random sampling and testing of products using MEKO. CPCA was hopeful that all members would achieve compliance on time or shortly after the code expiration. However, Health Canada called a special CPCA meeting in December 2019 to inform members that all three elements of the Code were NOT fully adopted by Architectural companies. A mandatory Risk Management Instrument is now expected even though no other jurisdiction will regulate MEKO, neither the US nor the EU. CPCA anticipates that there could be a SNAC imposing a low concentration limit that could virtually eliminate the use of MEKO as an anti-skinning agent in paint products. This may be done despite the fact that it is essential in alkyd-based formulations and there is no cost-effective alternative available for members to substitute MEKO. CPCA sought views of possible alternatives but officials refused to comment on acceptability. This remains a challenging issue for the paint industry and government.

#### Ethylbenzene Update

At the last Paint and Coatings Working Group (PCWG) meeting in April 2020, officials confirmed they are still aiming for a Significant New Activity Notice (SNAC) for ethylbenzene, which will target specific uses in concrete floor sealers, lacquers, stains, and varnish alkyds. Last year's survey results also indicated no reported concentrations exceeded the limit of 1% that will be imposed by the SNAC. Government has confirmed with CPCA that it has accepted CPCA's request to exclude aerosol products from the SNAC in question.

#### Surface Coatings Materials Amendment

A consultation on the proposed amendment to the Surface Coating Materials Regulations (SCMR) was launched late in 2019 with a questionnaire sent to industry stakeholders to inform the Regulatory Impact Analysis (RIAS) on costs. The publication







of the proposed SCMR amendment in the Canada Gazette has been delayed until further notice, due to the COVID-19 pandemic creating a regulatory backlog. The proposed amendment text appears unchanged. Changes to the definition of coatings will exclude solid films that form by means other than drying, such as powder coatings for which the applicable total lead (Pb) limit of 90 mg/kg will not apply. The limit applies once the film has dried and requires testing of the dried samples. The amended Section 6 of the SCMR will include furniture in the list of children's products for which the total lead limit applies to surface coating materials in accessible parts of the products only.

## CMP Phase 2

### Outstanding Risk Assessments

CPCA continues extensive work on a number of chemical assessments and working closely with members on the critical information to help inform the assessments. The Final Risk Assessment Report (FSAR) for the phthalate subgrouping was planned for Summer 2020. The Draft Risk Assessment Report (DSAR) proposed that two substances be declared toxic and both are used in CASE formulations, and includes DHEP. Several of the remaining 26 phthalates used in CASE products were suspected of having some endocrine disruption effect or a cumulative effect, but were proposed as non-toxic at current levels. The FSAR for Certain Flame

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Retardants will also be published and three of these substances have been proposed toxic and two of them (DP and DBDPE) will be added to a list of prohibited substances in Canada.

CPCA recently reminded members about the 134 Boric Acid, its Salts and Precursors that were proposed for a CEPA-toxic decision for human health and the environment. However, the FSAR is still on hold. The government did not provide an update for the risk management instruments to be developed for soluble cobalt compounds that were all declared toxic for the environment. The SNAC notice for the internationally classified substance AEEA is still awaiting finalization. AEEA is used as a curing agent for epoxy resins, as a component of adhesives and sealants in asphalt paving or patching products, and as a component in super glues and corrosion inhibitors.

## CMP Phase 3

There are several groups of CASE-implicated substances being assessed between now and the end of 2021. Several key publications will be delayed because of COVID-19. CPCA will watch closely for the Final Screening Assessment Report (FSAR)

publication for benzophenone, which will likely be concluded toxic at a very low level, hence affecting some resins currently used for indoor and exterior consumer coatings products. Also expected is the publication of the FSARs for pigments and dyes and fatty acids and their derivatives that are proposed as non-toxic. This is also the case for triarylmethanes with 2 substances proposed for a toxic designation. The Draft Screening Assessment Report (DSAR) will be published for acid and bases and CPCA will also monitor the DSAR publications of naphthalene sulfonic acids and salts, alcohols, aliphatic amines. CPCA and the US Chemistry Panel on Ketones submitted comments on the DSAR for ketones, challenging the toxicity decision for MEK, MIBK, and 2,4-PD, which are used in certain liquid and aerosol paint and coatings products; and more widely, in allied products (thinners, removers) available to Canadian consumers. Also soon to be published in the fall will be the FSAR for the Furan group in which furfuryl alcohol is proposed as toxic for its current use in wood strippers with no cost-effective substitute and the same for tetrahydrofuran, a common solvent in industrial CASE products.

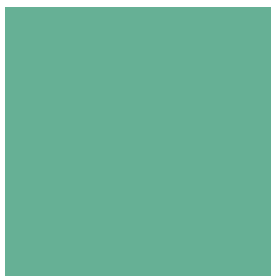
The FSAR for commercial naphthenic acids is also expected in Winter 2021, but could be delayed. The DSARs for ethers, manganese, aluminum



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and titanium compounds and titanium dioxide, are postponed to later than winter 2021. CPCA will be watching out for other important DSAR publications in 2021, such as for benzotriazoles and benzothiazoles, esters, ethers, and other polymers, for which the government did not give any timeline in 2021. The government did not confirm the DSAR publication previously expected in Summer/Fall of 2020 for piperazine and substituted phenols, neither for the FSARs for siloxanes (non-toxic), epoxides and glycidyl ethers (non-toxic) and petroleum coal tars and base oils (non-toxic) substances among others.

For NMP, CPCA learned that the FSAR is being delayed until a more final evaluation can be published by the US EPA under TSCA. The TSCA draft risk evaluation was published at the end of last year along with a risk management evaluation document and a final risk evaluation report is expected at the end 2020 or in the first part of 2021.

For anthraquinones, the current levels of these non-toxic substances will continue to be tracked and may be the object of future actions by the government. Recent Chemical Assessment Reports included Turpentine, Zinc Compounds, Resins and Rosins, Talc, Copper Compounds, and several others of interest to the coatings sector.

## CPCA Filed Comments on Behalf of the Coatings Industry

- The Acyclic, Monocyclic and Bicyclic Monoterpenes Group those substances proposed as toxic include turpentine and turpentine oil toxic for health in paint thinners, cleaners and removers. CPCA findings concluded these two substances are not used in paint and coatings in Canada and rarely used in allied products.
- Draft Screening Assessment Report (DSAR) for Zinc and Zinc compounds proposed to declare toxic all 64 substances on the basis of environmental concerns. Although the paint sector is not specifically targeted in the risk

management scope there could be some indirect impact and thus it will be monitored closely by CPCA on behalf of the coatings industry.

- The DSAR report for the resins and rosins group proposed that only one substance (CTO or tall oil) be designated toxic as it relates to environmental concerns. Though the risk management scope does not specifically target the coatings sector, several substances in this group are CASE-related and CPCA will follow-up on the toxicity stats of substances in this group in the final screening assessment expected in Winter/Spring of 2021.
- The DSAR for TALC proposes a toxic designation for inhalation and addition to Schedule I of CEPA, but will mainly target consumer products available in loose powder format, not liquid paint and adhesives mixtures. The FSAR is expected to be published this fall or early in 2021.
- The DSAR for the Copper grouping proposed to declare all 37 substances toxic for the environment. Many substances in this group are used by CPCA members, such as in antifouling paint. The FSAR is anticipated in Winter 2021 and CPCA will follow-up on the risk management approach in the coming weeks.
- For Calcium 2-ethylhexanoate, significant new activity restrictions (SNACs) will be proposed later in 2020, which may limit its use in consumer coatings products.

**NOTE: CPCA continues to engage with committee members regarding new or rescinded SNAC provisions and several ministerial conditions worthy of note. This information will be regularly posted on the Canada's CoatingsHUB and linked to the database for ease of access by all members.**

## E2 Regulations

The Final Environmental Emergency Regulations (E2), a risk management tool under CMP, came into force on August 24, 2019. CPCA members were







made aware of all related changes and the need to be fully compliant before this date. Compliance promotion tools (technical guidelines) were deployed in January 2020.

## TiO<sub>2</sub> Assessment Delayed

The TDMA recently informed the World Coatings Council of their intent to bring a legal challenge of the EU TiO<sub>2</sub> Classification before the EU General Court. ACA will join the challenge as an intervenor in conjunction with two European trade associations, such as CEPE and the British Coatings Federation (BCF). The expected timing, absent any COVID related delays for this legal challenge, will be a Joint Application to intervene in August/September 2020, with a Joint Statement on Intervention due in January/February 2021, with subsequent lesser written submissions due

in March 2021. The oral hearing is not expected until some time in 2022.

CPCA took the initiative with the WTO Technical Barriers to Trade Committee, via Global Affairs Canada, regarding the proposed EU harmonized classification, labeling, and formulation requirements for TiO<sub>2</sub> and cobalt, stating that these actions would be unnecessarily disruptive to billions of dollars in Canada-EU trade, and expressed concerns about the transparency of the EU process. Health Canada/Environment and Climate Change Canada has not confirmed the date of the DSAR publication for TiO<sub>2</sub>. From discussions with officials CPCA believes that this DSAR will be delayed to late into 2021 or 2022, given the need for more information gathering and discussions with industry, as this substance was not part of any previous mandatory information gathering initiatives.

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## Microplastics and Paint

For the Post-2020 approach to chemical assessment, government officials are planning a new national mandatory survey on the use of microbeads/microplastics in CASE products and other mass consumption products, likely to be delayed to 2021 or 2022. CPCA provided federal officials with critical information gathered by CEPE in the EU and the World Coatings Council regarding the potential relative contribution of down-the-drain paint releases to the total quantity of microplastics found in the aquatic environment, which has been shown to be “minimal.” CPCA also provided further information for the federal Government on the content, use and management of microplastics in paint products sold in Canada. The ECHA proposal in the EU focused on intentionally added microplastic restrictions seeking to eliminate “polymer” use from consumer and professional products. This followed a definition of microplastics that creates an enormous scope and includes polymer dispersions by covering small, less than 5 mm synthetic polymer particles that resist (bio)degradation. The coatings industry is largely against this EU myth of “go polymer-free” as there is no evidence to suggest negative impacts from such actions. The World Coatings Council submitted comments as a result of the open consultation last year. Evidenced-based restrictions on microplastics could possibly be adopted in the EU sometime in 2022.

## Draft Science Assessment of Plastic Pollution

CPCA recently commented on the federal government ‘strategy report’ which was its attempt to review the current state of the science regarding potential impacts of plastic pollution on the environment and human health, both from a micro and macro perspective. The report recommended that a comprehensive research strategy be developed to address knowledge gaps and provide a more robust understanding of the risks associated with plastic pollution. As a member of the CEPA Industry Coordinating Group (ICG), CPCA fully supported ICG’s comments but also provided its own additional comments of concern for the paint industry, which included challenges on the relevance of the proposed application of the precautionary principle for macroplastics and microplastics, inconsistencies in the definition of microplastics, shortage of standardized analytical methods for microplastics, specific case of paint additives products, and recommendations for the continued adherence to risk-based CMP process. The coatings industry must be vigilant in monitoring developments over time on this rapidly advancing issue globally, especially in Canada.

## Copper Used in Marine Coatings

In CMP Phase 3 a draft screening assessment report for 37 copper compounds was published for environmental concerns along with a proposed environmental quality guideline. CPCA submitted comments. The FSAR is slated for publication in Winter 2021 with all copper compounds (and not limited to this list) recommended for addition to Schedule I of CEPA. The paint sector is not the primary focus for restricting the environmental releases, but the toxicity declaration may have some indirect effects on the use of copper compounds in colorant dispersions, architectural/industrial paint and in antifouling paint (to specifically receive closer attention from risk assessors and managers in 2020-2022).

## Toxic Substances Management Policy (TSMP)

CPCA has participated in a number of discussions on the Government’s TSMP and continues to monitor possible developments respecting amendments to the Toxic Substances Management Policy (TSMP) of 1995, which may also introduce SVHCs (Substances of Very High Concerns) in Canada, as part of a future CEPA amendment. This option could mean the development of four lists: SVHCs, Other Toxics List, Watch List for Non-Toxics at Current Levels, and an Openly Safe List. This will add increased pressure on the industry to provide the necessary data to ensure assessments related to these various lists are realistic and are evidenced-based. Officials confirmed that they will also be considering TSCA’s New Lists of priority substances or groups of substances during its 2020 analysis of other possible substances to assess.





# EXTENDED PRODUCT STEWARDSHIP



## Two Critical PMRA Consultations


CPCA was an active participant and submitted several comments on two recent initiatives to improve the way the PMRA does its work including the need for an improved PMRA re-evaluation process and another one on a proposed regulatory amendment to the Pest Control Products Act and Regulations related to pest control devices (i.e. antimicrobial paint). The PMRA has been developing recommendations for a more sustainable post-market review program since last spring and industry looks forward to actions being taken on an improved process. Improvements are long overdue.

## CPCA Informs PMRA on Lack of Viable Alternatives

CPCA compiled a list of members' views on the technical advantages and disadvantages related to formulation restrictions associated with each in-can preservative currently registered for use in paint manufacturing in Canada (only 17 remaining) or each dry-film preservative (only 11 remaining). This compilation was provided to PMRA and it clearly shows there are no suitable alternatives to OIT (dry-film) and several limitations to securing a suitable alternative to CMIT/MIT (in-can). Most of the registered biocides have either issues related to toxicity, high cost, discolouration, increased odour and sensitivity or chemical incompatibility issues restricting their use in paint mixtures.

## PMRA Questioned CPCA Members on Material Preservatives in Canada

On February 3 the Pest Management Regulatory Agency (PMRA) sent a questionnaire to CPCA for distribution to its members on the issue of material preservatives, or combination of material preservatives, authorized for paint use by the US EPA, but not authorized in Canada. It also sought insight on whether our members would like to use them and the reasons why these material preservatives are not authorized in Canada. In an effort to promote better alignment between the two agencies, CPCA collected a list of 15-17 material preservatives and submitted those to the PMRA. CPCA recommended PMRA allow data bridging to decrease the costs of biocide registrations,



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collaborate with the US EPA to have cross-over regional registrations, allow multiple registrant contacts, work closely with trade organizations (users) during registration and all must be prior to re-evaluations of registered products. This would help the PMRA understand better any potential impact of a non-registration or a change/restriction in the registration status on industry. And, to amplify the fact that there is a desperate need for better research and understanding on the availability or lack of alternatives and related limitations for biocides used in paint preservation.

## Better Alignment of PMRA Policy on Treated Articles with EU Guidance

CPCA had several discussions with a limited number of PMRA officials, ACA representatives, registrants, and US paint companies regarding compliance issues raised by the 2018 PMRA "Information Note on Treated Articles" and the permitted status for use of the DSL-NDSL approach for RM materials in treated articles, which do not have biocidal activity in the mixture. CPCA Biocides Council proposed that PMRA adopt the EU guidance published in December 2018, which clearly addresses the status of biocides contained in raw materials, which do not have any intended biocidal effect nor make claims. PMRA will consider the EU language in the context of a revised note and Q/As that are now postponed to the end of 2020. PMRA officials allege that any legal interpretation of the "Information Note on Treated

Articles" should be done on a "case by case" basis with individual companies to protect CBI information.

## CPCA Meets with Pest Management Regulatory Agency Executive Director

Many times over the past four years CPCA raised the issue of variances between the US EPA and PMRA re-evaluation approach and brought this matter to the attention of PMRA's Executive Director, senior officials, risk assessors, sector leads, as well as several representatives with the Regulatory Cooperation Council (RCC) of the Treasury Board Secretariat. A recent presentation by the PMRA at a meeting of the Paint and Coatings Working Group (PCWG) raised concerns over the prospect of pending decisions by the US EPA that would further limit critical uses of biocides, namely, isothiazolinones (ITAs), which are critical for product formulations in the coatings sector. This has once again raised the need to remind both Authorities on each side of the border to take action to prevent "Canada-only" or "US EPA-only" restrictions for antimicrobials in paint and coatings products. CPCA will address numerous recommendations to RCC in an effort ensure the paint issues are fast-tracked in the context of the Department Commitments and Work Plans 2019-2020 and the related work sharing of re-evaluation/registration information for active ingredients. This will be the only way to align critical work related to both the science and timing for the next round of US-Canada re-evaluation discussions.

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## Members Export Non-Registered PMRA Preservatives

CPCA suppliers recently sought clarification from the PMRA on a possible PMRA program for export-only treated articles similar to the IMEP (Import, Manufacture, Export Program) or whether the IMEP itself could be made applicable to treated articles for paint. The IMEP allows manufacturers to import and use a Technical Grade Active Ingredient, registered under IMEP only, followed by a reduced regulatory requirement assessment, to manufacture an unregistered EP for export only. Although the exported EPs (material preservatives) are not registered for use in Canada, they are acceptable for use in other jurisdictions and this program provides essential relief to Canadian manufacturers allowing them to participate in export markets with no risk to the Canadian population. Establishing a similar program for treated articles and/or extending the IMEP scope to include the consideration of treated articles destined for export only, would reduce the regulatory requirements for manufacturers of treated articles, as it does under the IMEP for manufacturers exporting EPs. This would seem to be appropriate in the context of various trade agreements signed with other countries, especially that of the USMCA.

## Paint Recycling in Canada

CPCA was successful in securing 100% of the \$15 million in surplus funds for paint companies in Ontario. Those funds were accumulated in overcharges to paint companies by Stewardship Ontario from 2010-2015. Ontario is in the process of transitioning the waste diversion program for Municipal Hazardous or Special Waste (MHSW) to full producer responsibility with a new regulation to be finalized by June 30, 2021. CPCA continues to participate in consultations on the new regulation reviewing definitions of materials and responsible persons; possible management standards; promotion and education; collection and consumer accessibility; and registration, reporting and auditing. CPCA made a formal submission to the MECP and continues working toward a reasonable and fair regulation for the paint industry in Ontario as the paint companies must pay 100% of the costs for recovery and meet established waste recovery targets for leftover paint.

The Alberta Recycling Management Authority consulted on fee changes for certain materials in 2020. The adjustment in fees in Alberta for aerosols resulted from the Government's modernization of its recycling regulations in December 2019. ARMA launched a 90-day implementation phase from August 1 – October 30 to ensure producers and suppliers adjust their financial systems to new fees that will take effect on November 1<sup>st</sup>. CPCA and its members were provided an opportunity to comment and agreed with the level of fees being considered which is in line with the national average for such products.

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# AIR QUALITY

## LOWER EMISSIONS



Air quality has always been top of mind for governments around the world and the coatings industry has stepped up to the plate globally with significant VOC emission reductions achieved over the past ten years. In Canada, after the current AIM and Auto Refinish regulations, the coatings industry achieved more than 94 percent emissions reduction in the architectural sector and continues to build on significant success in the auto refinish sector now approximately 35 percent reduction in emissions from automotive refinish coatings.

### Amendments to Existing VOC Regulations

VOC emissions and air quality continue to be a strong focus of the current federal government. In 2019, Environment and Climate Change Canada

(ECCC) conducted a comprehensive study related to the national VOC limits for 53 categories of Architectural coatings sold in Canada. It included the possibility of adding 10 new categories to the Architectural regulations enacted in 2009. The federal government's goal is to achieve additional emissions reduction by aligning the Canadian regulations to California's CARB-2019 or OTC Phase II VOC limits being adopted in the North Eastern States. The federal Government's consultation paper will be shared with CPCA sometime before the end of 2020. Following that they will publish an amendment in the Canada Gazette Part I in 2021. ECCC made a detailed presentation to CPCA members on the national survey results for such an amendment to Architectural regulations. CPCA provided substantive comments on the survey in an effort to ensure that government fully understands

# INSPIRING A FUTURE **WITHOUT WASTE**

Alberta's paint recycling program has recycled **27 MILLION LITRES** of paint since 2008. Thank you for helping empower our vision of inspiring a future without waste.

**ALBERTA RECYCLING MANAGEMENT  
AUTHORITY IS A PROUD PARTNER OF  
THE CPCA AND ITS MEMBERS**





the impact of stricter VOC limits on product formulations and related product performance over the long-term.

CPCA raised a number of recommendations related to the any future amendments to the VOC regulation and included such concerns as the need to:

1. Avoid the adoption of any hybrid version of the US rules
2. Acknowledge the significant VOC emissions reduction already achieved in Canada
3. Model future amendments to regulations on OTC (Phase II) limits at a maximum;
4. Significantly deepen and refine the actual technical and cost-impact analysis to reflect the Canadian SME situation
5. Consider the relevance and importance of performance characteristic associated with very low-VOC water-based products transported and used in very cold conditions
6. The need for significantly longer implementation times for specialty categories

CPCA also formed a working group with CPCA member companies to further inform government regulators on specific technical feasibility that could impact Architectural members prior to the consultation later this year and early in 2021.

## VOC Developments for Industrial Coatings

There has been little development to report with respect to Canada's Federal VOC Agenda 2010-2020, which will be renewed in the coming year and further discussions will take place between the federal government and CPCA members. Federal officials indicated that additional industrial categories will be added in the next Federal Agenda 2020-2030. CPCA had discussions with officials regarding the pending four categories identified in the Federal Agenda 2010-202, which have not yet been addressed: industrial adhesives and sealants, cars/vans/light truck/assembly coating/auto parts coatings, rubber product manufacturing and plastic parts coatings and aerosol coatings. They will be addressed in the next Federal Agenda. In the meantime, the old voluntary CCME standards remain the only industrial standards and/or practices recommended in Canada for specific sectors (i.e. coatings for automotive assembly or wood furniture manufacturing). These CCME guidelines could may still be required in permits and/or certificates of approval required by certain provinces.

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# ENVIRONMENT, HEALTH & SAFETY

## WORKER SAFETY FIRST



### Regulatory Cooperation Council Update

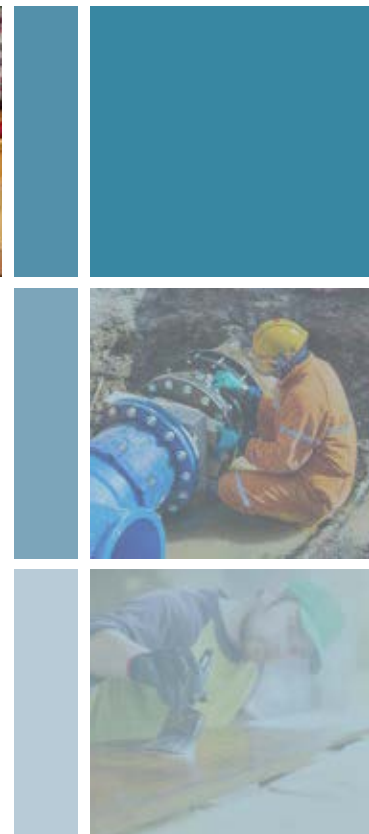
Canada's Treasury Board Secretariat (TBS) developed a draft Cabinet Directive on Regulation (CDR) outlining the Government's expectations and requirements on federal departments and agencies as they consider regulatory alignment at all times when regulating. CPCA and ACA submitted and re-submitted comments in 2018 and 2019 regarding the US EPA/PMRA misalignment of the re-evaluation and registration process, methodologies, and timelines. The RCC Joint Plans 2019-2020 were published in March 2020, which included WorkPlan C for work sharing of re-evaluation/registration for active ingredients to align key science work and timing for the next round of US-Canada re-evaluation. CPCA was grateful for the RCC for Workplan C despite the RCC coordinating efforts being complex and time consuming as it relates to implementation, especially related to fundamental changes of culture in organizations. CPCA reiterated the need to expedite alignment measures as our industry continues to face challenges with respect to key ITAs used in coatings preservation and several others in the short-term, all of which resulted from PMRA taking restrictive measures - unique to Canada - causing alignment issues with our largest trading partner. CPCA also raised the issue of PMRA's Information Note on the "Treated Articles Policy" addressing specific cases wherein raw materials containing trace amounts of biocides added to paint mixtures with no intended biocidal effect.

### GHS Compliance Support

Extensive work was initiated this past year to advance members' transition and full compliance with WHMIS 2015. CPCA continues to assist members with Health Canada guidance publications, inspector blitz warnings, hazard database information, technical questions from members, and training opportunities. CPCA recently shared with selected members an improved draft version of the new Health Canada's SDS Compliance Promotion Tool for their comments, prior to its approval by the CIC (Common Issues Committee). CPCA and other industry groups supported the official publication of the tool and will issue additional comments with respect to the potential use and application of its use by inspectors.

### Hazardous Materials Information Review Act (HMIRA) Modernization

The HMIRA was further amended in June of last year to improve electronic claim filing and management, exemptions, appeals and powers of the Minister regarding the public disclosure of the content of claims. The amended HMIRA maintains the existing fee structure for CBI claims while increasing it annually based on the future Consumer Price Index. Health Canada also plans to implement the exclusion of all CMRs (carcinogenic/mutagenic/reprotoxic) from any CBI claims.





## CMP-WHMIS Strategy

Federal officials have been exploring how occupational health objectives might fit within the CMP modernization effort Post-2020. CPCA submitted formal comments of concern regarding this "Federal Strategy" last year and supported the comments made by the Industry Coordinating Group (ICG). CEPA was not designed for occupational exposure consideration. Federal officials already have the ability to integrate information relevant to occupational exposure and to convey their conclusions efficiently without the need for a new and complex resource/time-intensive federal/provincial entity to process it. There has not been any new development on the Federal Strategy over the past months due to COVID-19, except for the publication of a Summary of Feedback received from the consultation.

## Consumer Products Use Education and Outreach

Health Canada developed educational materials and an outreach strategy to communicate the content on the use of consumer products in the workplace. Industry was not opposed to this initiative but remained firmly opposed to any future amendment of the Hazardous Product Act that would remove the current consumer products exemption. A CIC working group was struck to provide input and expert advice on this project and it has met on an ad-hoc basis to discuss the outreach strategy with Health Canada officials. In March 2020 a final version of these educational materials were shared with CPCA and other CIC industry members as a courtesy only with no opportunity to comment. To CPCA's surprise a number of unsubstantiated risks in the 'educational materials' relating to consumer products specifically included paint products, which were identified as toxic without any substantiation of any undue exposure. These spurious comments have been challenged and addressed for what is arguably a signature and highly sustainable product for all coatings companies in Canada, latex paint.

CPCA raised this issue with the Assistant Deputy Minister of Health Canada given that the document was finalized without consensus among CIC stakeholders and a complete lack of transparency. As such, they removed spurious and inflammatory comments on consumer paint and coatings products being among the primary products associated with occupational illness and/or toxic concerns in the marketplace. As a result of CPCA's concerns and that of other industry opposition, this committee has reconvened to revise the documents and ensure better communication and transparency in future.

## GHS Revision 7 Status

The government planned to amend Hazardous Products Regulations (HPR) in the first months of 2020 to initiate conversion to Revision 7 of GHS in Canada. CPCA learned that the publication date of Revision 7 amendment in Canada is now being postponed due to the Covid-19, which is now tentatively planned for Fall 2020 in the Canada Gazette Part I. This publication will also depend on concomitant efforts in the US to comply with the Rev 7 and on coordination with US OSHA through RCC for maximum alignment. Due to the current delay, the HPR amendment is not to be implemented before early 2022. CPCA was not made aware of any particular concerns from members with respect to Revision 7.



## Non-mandatory National Classification of 25 Widely Used Chemicals

This classification was postponed to 2020. Earlier examinations of one of the classifications of a common substance (NaOH) at the last government-industry-labour CIC committee meeting reveals some lack of consistency with existing classifications in Canada (Reprotox) and even in the EU. The classification of four hazardous substances was published in January 2020. Health Canada must consult CIC members before publishing more substances in this list at the next CIC meetings in Fall 2020. Due to the COVID-19, the tentative publication date of the 25 substances of this classification was not discussed at the last CIC meeting.

## True Label Copy Requirement

Along with other groups, CPCA formally requested an amendment to Section 14.3(1)(a) of the Hazardous Products Act, regarding the requirement for the true copy of labels as part of the Budget Implementation Act. CPCA estimates that this unique and unjustified requirement introduced in the new Act in 2015 is costing the paint and coatings industry as much as \$18 million. Last year, Health Canada officials asked for a very detailed description of the true copy label burden at every step of the three streams: raw materials supply, manufacturing, and distribution. CPCA submitted a detailed submission with the help of members. This CPCA document was well received by officials, who finally understood the complexities of the issue for the first time. Health Canada is still considering the removal of the true copy provision in the HPA but with an extension of the SDS retention period from 6 to 30 years as being more in line with US. A final decision has not been made as to various government initiatives.



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“

CPCA's regulatory prowess and our 108-year legacy of providing members with exceptional advocacy on a wide range of industry issues with global implications has created a winning environment for CPCA to engage with the global paint and coatings community through the World Coatings Council on many files related to chemicals management and sustainability.

GARY LEROUX, PRESIDENT & CEO, CPCA



World  
Coatings  
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**The Voice of the  
Global Coatings Industry**



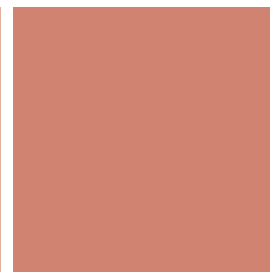
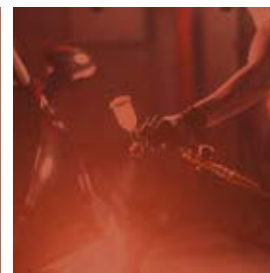
# World Coatings Council

## HISTORY OF THE WCC



### Global Reach, Local Impact

Over the last several years, common issues facing the paint and coatings industry on a global level have increased significantly. While it is always a constant challenge for each individual country to manage the myriad of domestic regulations, it has become increasingly difficult to interpret the potential impact of foreign issues. In 1992, in an attempt to improve communication and to coordinate industry policy on matters of international concern, the International Paint and Printing Ink Council (now the World Coatings Council) was formed. The council was established to ensure that the industry would support coordinating the development of industry policy on international issues and share information for better public policy and regulation coatings. In 2005 the council was granted NGO status from the United Nations Economic and Social Council and now raises awareness of international industry issues with the UN and it's governing body.



### Issue Management

At the inaugural meeting of the Council in August 1992, the council identified common issues of concern separating them into two categories—"communication" and "action." Today the council continues to apply that process. The communication category includes issues the council determines the need to be managed on an exchange-of-information basis, such as training and education, or air pollution controls. The action category includes issues that have been identified for proactive industry initiatives, including sustainability, product stewardship, air quality, workplace safety, chemicals management and more.

### Sustainability & Innovation

There have been tremendous advances by the coatings industry in new technology such as moving aggressively to water-based paint, reducing VOC emissions and recycling millions of kilograms of leftover paint every year. The coatings industry offers a world of other benefits that are often overlooked. This applies to architectural, automotive and industrial coatings with a wide range of innovative, sustainable and highly performing products. All of these meet very stringent customer demands. Paint is more than what you see on your wall. The industry is reflected in everything around us helping us reduce our environmental footprint and improving our quality of life – everyday!

Continued innovation in paint and coatings will lead to even greater benefits in the future as companies continue to invest heavily in R&D leading to better coatings technology in support of a circular economy.

### Members

American Coatings Association (ACA)  
Australian Paint Manufacturers' Federation (APMF)  
Brazilian Paint Manufacturers Association (ABRAFATI)  
The British Coatings Federation (BCF)  
Canadian Paint and Coatings Association (CPCA)  
European Council of the Paint, Printing Ink and Artists' Colours Industry (CEPE)  
China National Coatings Industry Association (CNCIA)

French Paints, Printing Inks, Artist Colours and Adhesives Association (FIPEC)  
German Paint Industry Association (VdL)  
Japan Paint Manufacturers Association (JPMA)  
Mexican Paint and Printing Ink Manufacturers' Association (ANAFAPYT)  
New Zealand Paint Manufacturers Association (NZPMA)  
South African Paint Manufacturers Association (SAPMA)  
Association of the Paint Industry in Turkey (BOSAD)



# THE ENVIRONMENTAL BENEFITS OF COATINGS

PRESERVE • PROTECT • IMPROVE 

## TYPE OF COATING

## BENEFIT

Architectural and industrial coatings on public infrastructure, buildings, bridges, manufactured items, automobiles



Decreased lifecycle costs, delay need for new infrastructure and products, reduces energy consumption and preserves raw materials

Energy efficient windows coated with functional coatings to directionally transmit light and heat



Saving 9% to 18% in energy costs for home-owners

Reflective roof coatings create a cooling effect, reducing AC use and increasing energy savings



Saves residents and building owners 20% to 70% in annual cooling costs, reducing fossil fuel consumption and GHG emissions

Anti-fouling marine coatings on more than 250,000 ocean-going vessels and underwater infrastructure



Protects valuable ecosystems in fresh water lakes; increased fuel savings of \$60 billion annually; reduces 384 million tonnes of carbon dioxide annually or equivalent of 64 million average cars taken off the road

Coatings substituted for more costly alternatives to strengthen softwoods in place of more valuable hardwoods



Reduces raw material consumption while creating carbon sinks that reduce GHG emissions

Traffic paint is used to line streets, highways and parking lots



Prevents accidental loss of property and lives on a daily basis

Anti-bacterial and easily cleaned coatings are used in hospitals, senior care centres, food containers and other key contact points



Prevents illness, helps feed families and makes nutrition affordable for populations at risk





## RESCHEDULED TO MAY 2021

CPCA'S 107<sup>th</sup> ANNUAL CONFERENCE & AGM

# Driving Change & Innovation: One Coating at a Time

*CPCA's Annual Conference & AGM has been rescheduled for next May. **Save the Date:** May 26 & 27, 2021. The Conference will take place at The Fairmont Chateau Frontenac in Québec City.*



CANADIAN PAINT  
AND COATINGS  
ASSOCIATION

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





“

INSIGHT provides an excellent opportunity to speak directly with a very targeted audience. The paint industry is critical to our business as paint recyclers, and having a direct point of engagement ensures that our industry members are up to date on the latest information regarding paint recycling in Canada.

MARK KÜRSHNER, PRESIDENT & CEO, PRODUCT CARE

# MULTISTAKEHOLDER RELATIONS

TOGETHER WE STAND 



## Multistakeholder Relations

CPCA understands that it is not alone on many issues. The Association collaborates with a number of organizations to accurately advocate for the industry on a wide range of issues. Moreover, it is important that CPCA listen to what respected stakeholders have to say — whether they be government, industry associations, standards organizations, non-governmental organizations or the public. Effective stakeholder relations require CPCA to consider the views and formally stated positions of others in the context of the concerns and aspirations of the coatings industry.



## American Coatings Association

The American Coatings Association (ACA) is a voluntary, non-profit trade association working to advance the needs of the American paint and coatings industry and the professionals who work in it. ACA serves as an advocate and ally for members on legislative, regulatory and judicial issues, and provides forums for the advancement and promotion of the industry through educational and professional development services.



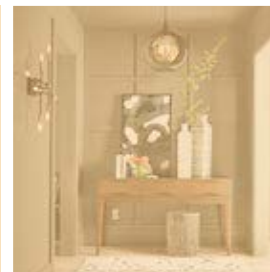
## CEPA-Industry Coordinating Group

CEPA-ICG, is the Industry Coordinating Group for CEPA comprised of 27 industry associations whose members use chemicals in their products. ICG holds extensive multi-stakeholder consultations throughout the year on the federal government's Chemicals Management Plan (CMP) assessing all chemicals in commerce in Canada. It engages with government officials using a technical, science-based approach to exchange information thereby ensuring officials have the data needed to make informed decisions on both chemical risk assessment and risk management, all based on the 'weight of evidence.'

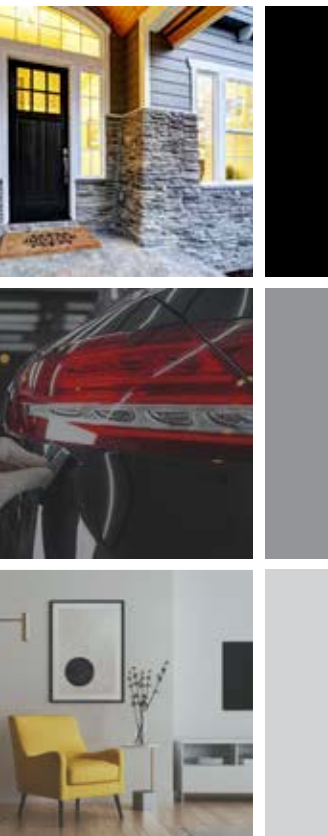


## Canadian Association of Surface Finishing

CASF is the principal surface finishing industry association in Canada for metal finishes such as chrome and copper plating for a wide range of commercial finishing jobs from automobiles to oil field equipment to computers.







## Canadian Manufacturing Coalition

CMC consistently advocates for better legislation and regulations on behalf of the manufacturing industry. Its membership is comprised of 54 industry associations, representing key industrial sectors across Canada, roughly 100,000 companies and approximately two million people in manufacturing and supporting industries. Working in concert with allied associations such as the Canadian Manufacturing Coalition, CPCA continues its advocacy regarding the persistent challenges for Canadian manufacturing.



## CMP National Stakeholder Advisory Council

CPCA is one of six national industry associations, along with government and relevant Non-Governmental Organizations (NGOs), engaged in dialogue on the importance of chemical assessment as it relates to human health and the environment under Canada's world-leading and comprehensive Chemicals Management Plan.



## World Coatings Council

This group is comprised of paint and coatings associations representing coatings companies in more than 20 countries. It meets regularly to share information and work with global organizations such as the United Nations (UN), the Organization for Economic Cooperation and Development (OECD) and the International Maritime Organization (IMO). CPCA is a founding member of the World Coatings Council.



## UN Sustainable Development

More than 150 world leaders adopted an ambitious new sustainable development agenda at a United Nations session in 2017. The 2030 Agenda for Sustainable Development contains 17 sustainable development goals with 169 targets. WCC will continue to align strategic priorities to the UN SDGs in the coming decade.



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# MEMBER PROGRAMS & SERVICES



**NEW Members:** Contact CPCA to activate your account today to access thousands of resources for regulatory updates as they happen.



CPCA's Diploma in Coatings Technology is offered to students in Canada and around the world. Courseware is continually updated and available to those employed or interested in employment in the industry, providing a solid foundation in coatings technology. Now offered online, participants work at their own pace with easy to use e-learning training tools to gain the knowledge needed for career advancement in the coatings industry. The three-semester Diploma course containing three individual modules, can be completed in as little as eighteen months, or less. Each course is comprised of 50 hours of learning and participants are provided a maximum of six months to complete each online course. Participants can choose to take one or all three modules, and receive their diploma once all three are completed.

## Diploma Recipients for 2020

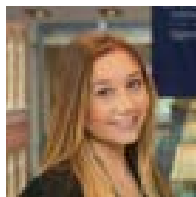
- Lucy Gibbons – DCC Lansco
- Grace Daniel – Lorama Group
- Bahar Razavi – Brenntag Canada
- Constance Rogers – Lorama Group
- Rahenul Ibrahim – Lorama Group

Congratulations to the five students who received a Diploma in Coatings Technology this past year!

## CPCA 2020 Scholarships

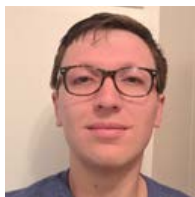
CPCA values education for our members, and the upcoming generation of chemists, paint formulators, and business leaders. Our Scholarship Program is offered to members only and is another way of supporting and encouraging the next generation leaders in their pursuit of education. To apply for a scholarship an application must be completed and submitted (link to section on website). Applications can be submitted at any time during the year. Note that successful applicants cannot apply again the following year. Only one scholarship is granted per student.

CPCA wishes both students success in their academic career and a promising career wherever they end up.



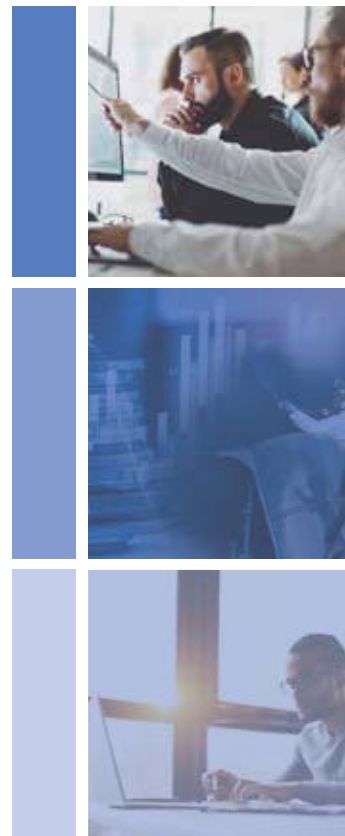
**Brooke Husar**  
**CPCA Member IMCD**

Brooke Husar entered the Commerce program at Queen's University. Previously she was involved in various sports and academic competitions at the secondary level and developed a strong work ethic. A volunteer at the local soccer club and working multiple jobs to expand her skills, which included an internship at CI Investments focused on Tax and Estates. She was also a Marketing Director at a not-for-profit club at Queens University.



**Brian Lozinski**  
**CPCA Member Cloverdale Paint**

Brian Lozinski is a student at Mount Royal University taking Cellular and Molecular Biology. After graduating from high school, he initially enrolled at MRU in the Bisset School of Business. After several years there he switched to the sciences developing a passion for research and more specifically neuroscience and molecular biology. After two summers working at Cloverdale Paint in their laboratory confirming his passion for lab work both academically and a business perspective. He will soon head to graduate school focused on neuroscience, specifically neuroimmunology and neuropathology. When not studying at school Brian volunteers with the Student Society of Science and Technology at the university, spending some time in the gym and playing recreational hockey.





# CPCACanconnects

## A COMPREHENSIVE COMMUNICATION PLATFORM FOR MEMBERS



Working for industry on the frontlines of issue management and regulatory development requires a comprehensive communications program.

### Regulatory RADAR

A core CPCACan mandate is helping member organizations navigate the Canadian regulatory landscape with confidence. The Regulatory RADAR is our premium monthly 'member-only' publication reporting on news of interest to paint and coatings manufacturers, suppliers and distributors. It details comprehensive legislative and regulatory actions at all levels of government in Canada and around the globe. It's a must-read for all involved in the Canadian coatings industry.

### Prime Time NEWS

A publicly available monthly newsletter sent to members, stakeholders, and government officials to provide a window into the industry for those with an interest or role in the sector. The PTN showcases members' ongoing innovation and research efforts that make the coatings industry leaders in delivering sustainable products with unmatched performance.

### CPCACan Bulletins, Press Releases & Government Submissions

CPCACan members are informed of new submissions with direct input on actions taken by CPCACan's board, technical committees, and staff. This ensures the industry is fairly represented when decisions are made affecting their business.

### CPCACan INSIGHT — Guide & Directory

This CPCACan annual report, guide and directory profiles the industry, provides updates on key issues, and considers future trends and impacts. It is provided for the benefit of all members and sent to 3,000 industry leaders via CFCM magazine's distribution list. INSIGHT provides members with unique advertising opportunities and an overview of the latest news and information in the paint and coatings industry in Canada.

### CPCACan Awards Program

CPCACan has a rich history of recognizing excellence each year at its Annual Conference & AGM. For the past three decades, the paint and coatings industry has been honouring those who have made significant contributions to the Canadian paint and coatings industry.

### Webinar Series

CPCACan hosts a number of webinars for members throughout the year to ensure members are fully apprised of the issues and to ensure full opportunity is provided for members to provide feedback and suggestions for ongoing advocacy where it may be required.

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# MEMBER DIRECTORY GUIDE ET RÉPERTOIRE DES MEMBRES

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## MEMBRES FABRICANTS



Thanks to CPCA members for supporting the important work of the association to sustain a strong and vibrant Coatings, Adhesives, Sealants and Elastomer (CASE) industry in Canada.





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Remerciements à tous les membres de l'ACIPR pour leur soutien au travail important que fait l'ACIPR en vue d'assurer que l'industrie CASE (revêtements, adhésifs, obturants et élastomères) demeure vivante et vigoureuse au Canada

