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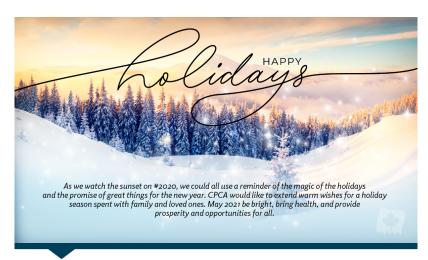








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DECEMBER 2020

LATEST ADVOCACY **CPCA REPORT** SUSTAINABILITY **ECONOMIC NEWS**

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LATEST ADVOCACY EFFORTS

- PMRA Restores Original Use Rates for CMIT/MIT Preservative in Paint Products
- CPCA Submits Substantive Comments on Proposed Decisions for Six Critical Paint Biocides
- CPCA and ACA Submit Joint Notice of Objection to the Proposed Order Designating Plastic Manufactured Items as Toxic
- CPCA Along with 13 ICG Member Associations Write to Key Ministers on CEPA Reform and CMP Renewal
- Canada's Architectural Paint Sector Achieves 58 Percent Reduction in Total VOC Emissions Since 2009
- Government to Study Opportunities for VOC Emission Reductions in Industrial and Commercial Adhesives and Sealants
- Federal VOC Agenda to be Renewed in 2021
- CPCA Obtains 2020-2022 Timetable of CMP Publications
- Government Provides CPCA with Risk Management Performance Evaluation Plan for 2021
- Members Discuss Changes to Explosives Regulations for Acetone and Aluminum Powder with Federal Officials
- Final Screening Assessment Report Proposes DEHP for Prohibition and Follow-up Activities for 20 Phthalates
- Bylaw Changes to ARMA's Paint Recycling Program Approved in Alberta

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



PRESIDENT'S MESSAGE

It has been a year like no other - and never again we hope! The pandemic had all working from home for those fortunate to do so. CPCA staff continued supporting members during the lockdown. First and foremost, the association wanted to ensure members had immediate and timely access to Government actions and initiatives supporting industry. The key advocacy work of the Association in the early days of the pandemic was to ensure the paint and coatings industry was designated 'an essential service' and could continue



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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 also captured the essential nature of coatings in their list of essential services for maintenance and repair, which included "businesses that manufacture inputs to other manufacturers." Manufacturing and paint retail sales continued with certain restrictions for curbside pickup in the early days and other sanitary measures were taken to ensure the health and safety of workers and customers.

The past year for business has been challenging but the architectural segment seems to have emerged strong toward the end of the year with the forecast for the North American market, according to Orr & Boss, from 1.5% to 3.5% in volume growth. Non-decorative industrial coatings will be down and will vary by segment as expected. Coatings markets are doing better generally than the overall economy due to strong decorative DIY sales as well as a strong recovery in housing markets. The forecast for 2021 will be more in line with pre-pandemic levels and the volume is forecasted to be around 4.2 per cent in North

CPCA continued its work on a number of critical files this past year including addressing the ongoing challenges on biocides used for paint preservation. That effort is still ongoing for six critical biocides now under re-evaluation and on which CPCA and its members recently provided detailed comments in an attempt to halt bans and/or restrictions. As part of that effort the association worked toward the creation of a coatings, adhesives and sealants working group to focus on re-evaluations of the remaining biocides used in product 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 on the necessity for alignment and relevant data is fully assessed in a timely manner to ensure decisions taken are evidenced-based. We remain hopeful that more can be achieved via this group.

As members know, CPCA was pleased that its work over the past year and a half resulted in the reversal of the OIT ban for paint and coatings preservation in Canada. It is now once again realigned with both the United States and the European Union. It also reinstated CMIT/MIT to its original levels for use in paint and coatings. All in all, this is a most welcomed development given the ongoing challenges the industry continues to face on regulatory alignment with its largest trading partner.

Successful advocacy in 2020 also led to the reimbursement of \$15 million in surplus funds to CPCA manufacturer members, as well as those companies in Ontario who are not members. These were funds paid for recycling fees to Stewardship Ontario prior to 2015, but was never used for that intended purpose, and before program operations were moved to Product Care. CPCA continues to advocate for reasonable regulations under the new Resource 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 clearly stated that any new regulations must reduce red tape and reflect the new Government's 'open for business' policy.

Amendments to the architectural paint regulations for 54 coatings categories is now on the table in Canada. Consultations have begun on adjusting the VOC limits enacted in 2009. There is also the possibility that 10 new categories will be added, which were not addressed in the first regulation ten years ago. The Assessment of chemicals in commerce continues under the Chemicals Management Plan with the current government likely to bring forward amendments to the Canadian Environmental Protection Act in the coming weeks or months. If stricter approaches to the assessment of chemical substances are the way forward in Canada, as seems likely, there will be an increase in bans and use restrictions for chemicals in future. The association - and industry generally - must be vigilant if and when such amendments are tabled as it could drastically limit the chemicals now used in a wide range of manufactured products. Members can get detailed updates and notices on the ongoing risk assessment and risk management measures for chemicals in commerce, and all other issues, on the CoatingsHUB via Hub notifications, and in the monthly newsletter for members, the Regulatory Radar.

To assist with the management of issues noted above, in January CPCA added an important feature to the many resources already on the digital platform, the CoatingsHUB. Members can now access the chemical substance database of more than 1,200 substances used in thousands of manufactured paint and coatings products regulated in Canada. This includes information on commercial chemicals used in the coatings, adhesives, sealants and elastomer (CASE) sector. CPCA members can search the new substance database by chemical number (CAS-RN), providing them with substancespecific information, as and when needed. It provides an 'at-a-glance' view of the status of

For the first time in CPCA history, the association departed slightly from its core competency related to regulatory development and compliance and will soon launch 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 objective of the P-I-Y site is to inspire and motivate consumers to take action and purchase one of our members' products for their homebased project. The site will be driven by a strong social media campaign to raise awareness of the many benefits of coatings products used around the home.

The coatings industry, both the leadership and their employees, are to be commended for providing essential goods and services to Canadians during the pandemic while ensuring the health and safety of all in the process. We at CPCA wish you and your families a safe and happy holiday as we look toward a more uplifting year ahead for all!

Gary LeRoux President & CEO





MEMBER ANNIVERSARY

More Awards for Laurentide in its 70th **Anniversary Year!**

Laurentide won the GREEN L'AVENIR category at the Shawinigan Chamber of Commerce and Industry's 2020 Distinction Gala. This category rewards companies caring about their environmental footprint. Laurentide also won the Economic Diversification Award, which highlights outstanding contributions to the City of Shawinigan's economic diversification efforts.



CPCA once again congratulates long-time member Société Laurentide on its 70th anniversary and a fantastic achievement by a family-owned paint manufacturer Past Issues Translate ▼

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founded in 1950 by Gabriel Buisson and operated by his son Andre who has taken the company to new heights. From its head office in Shawinigan, QC Société Laurentide has grown and now manages 250 employees in four manufacturing plants located in Shawinigan, Victoriaville, Richibucto (NB), and Springhill (NS), as well as its Research and Innovation Centre dedicated to coatings and post-consumer paint in Shawinigan. Société Laurentide is a proud participant of the "Well Made Here" program.

CPCA REPORT

CPCA Report on Federal Fall Economic Statement

The Deputy Prime Minister Chrystia Freeland's recent report revealed a deficit expected to hit a record CAN\$381 billion and a debt that will surpass \$1.2 trillion by the end of 2021, well behind other countries including Australia and Indonesia. Her statement indicated that the government remains focused on addressing the urgent needs caused by the pandemic. Meanwhile, the opposition parties have argued that it has not adequately addressed the situation as it relates to small business closures, overspending of \$32 billion on CERB and no substantive vaccine campaigns expected until well into mid-2021. Looking ahead to economic recovery, the federal government is committed to a time-limited, \$70-100 billion (3-4% of GDP) economic recovery plan, but no details were provided as to what the plan entails. Between now and Budget 2021, the government will actively develop the details of this stimulus program, which many believe will have more to do with a specific environmental and social agenda as recently seen in the announcement on climate change and plastics.

Orr & Boss Provides Monthly Economic Update to CPCA Members

Orr & Boss has increased its estimates for the North American and European decorative coatings market based on extremely strong North American construction and housing sales and continued strength in the Europe DIY markets. New residential figures remain strong and all signs point towards the beginning of 2021 remaining strong. North America housing starts were up 15 per cent compared to October 2019 while existing housing sales were up 25 per cent. North America commercial construction activity was down in October (-5.5 per cent) from pre-Covid levels and will begin to decline as projects scheduled and begun before the pandemic are completed and new ones begin. There were 34 per cent fewer commercial projects started in 2020 and this will work its way through the pipeline, causing a significant decline in 2021. North America DIY will remain very strong through Q1 of 2021 and will maintain growth in Q2-Q4. For 2021, Orr & Boss forecasts that DIY will be up in the 3-6 per cent range compared to 2020.

Government Proposes to Adopt CARB 2019 VOC Limits in Canada's New Architectural VOC Regulations

At the recent CPCA Paint and Coatings Working Group meeting in December, Government officials acknowledged that the Canadian Architectural paint sector has achieved 58 per cent reduction in total VOC emissions, roughly 10 years since the implementation of the VOC paint regulations in 2009. Despite this fact, the government is planning to draft and propose new Architectural VOC regulations in 2021 based on California CARB 2019 rule, the second toughest AIM rule adopted in North America (NA). Early in 2020, following the presentation of a report comparing NA category rules with the current VOC emission status in Canada, CPCA submitted comments underlining the fact that many of the VOC limits for the existing and new categories in the CARB 2019 and SCAQMD rule models would not be cost-effective or attainable, especially for SMEs which do not have ready access to the same technology as US companies trading in Canada. CPCA warned that the bottom line for Canadian business will be loss of manufacturing and the jobs that come with it. CPCA also stressed that CARB 2019 will have a serious impact on the performance of specialty products. CPCA recommended a smoother transition to the OTC Phase II rule model, which has not yet been fully implemented in several neighbouring states after several years. CPCA also emphasized that California does not experience cold climate conditions like those in Canada and stressed the importance of enforcing the new limits with longer implementation delays for all categories that CPCA members have identified as being particularly problematic in terms of R&D and testing.

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Explosives negulations

NRCan's Explosives Safety and Security Branch officials provided additional information on structural changes in the amendment of the Explosives Regulations that proposed new restricted components (calcium ammonium nitrate, aluminum powder, hexamine, and acetone) in May 2019. The substances will now be subject to a new Tier approach (Tier 1-2-3), which will more clearly separate the requirements for each reportable substance. They will be reduced for acetone in Tier 3 (the least stringent Tier approach) but will still apply to product sellers who will have to refuse and report suspicious sales of acetone at any quantity. Meanwhile, aluminum powder will be subject to additional requirements in Tier 2 for any quantities above 1 Kg (however manufacturers using aluminum powders for making products will be exempted). NRCan is aiming to re-publish the amendment in 2021, which will be followed soon after by a final publication and enforcement.

CPCA Welcomes Important Changes to the Use Rates for Two Critical Paint Preservatives

Following a CBC AEATFII CAT B data submission and two years of strong CPCA advocacy efforts, PMRA finally restored the old label rate for CMIT/MIT in November 2020. Following the recent lifting of the OIT ban in paint manufacturing by PMRA, CPCA revised the ACA guidance on Evaluation of Biocides and Treated Articles Restrictions. With the reissued guidance, dated December 2020, information addressing broader member interests in biocide registration requirements have been maintained while providing new label rates for OIT and CMIT/MIT along with additional updates regarding ongoing biocide evaluations in Canada. The latter pertains to PMRA's proposed decisions for the paint cluster analysis of six paint preservatives.

Alberta's Paint Recycling Program Bylaw Changes Approved

The Alberta Recycling Management Authority (ARMA) received approval for the proposed changes to the province's recycling program for aerosols. Environmental fees will increase under the new program for aerosol paint products coming into force on April 1, 2021, but will be based on the average fee rate for aerosols charged in other Canadian jurisdictions. Impacted producers and suppliers are being given 3 months to adjust their systems.



Please consult the CPCA Canada CoatingsHUB for more details on each topic.

MEMBER RECOGNITION

Axalta Receives 2019 Masters of Quality Supplier Award from Daimler Truck

The award honours top suppliers of components and services to Freightliner and Western Star brand trucks. It recognizes suppliers that scored high on quality, delivery, technology and cost performance.

Brenntag North America Director Wins 2020 NACD Distributor of the Year Award

Matthew Fridley, Director of Safety and Security for Brenntag North America, received the award. He is the immediate past chair of the U.S. Chemical Sector Coordinating Council and a member of the U.S. delegation for chemical security at the G7 Summit and holds many other positions of responsibility in national and global organizations.

IMCD Company HS Services Received the NACD 2020 Responsible Distribution Excellence Awards

The National Association of Chemical Distributors (NACD) recently announced the winners of the Distributor of the Year Award. IMCD's HS Services has been demonstrated its commitment to integrate Responsible Distribution at all levels through new electronic corrective and preventative action tracking system, newly added temperature-controlled food-grade storage room, cybersecurity measures, and enhanced facility training.

BASF Becomes Preferred Paint-Related Partner to the BMW Global Refinish Network

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strategy and its agreement for the supply of paint solutions to BMW authorized dealers and body shop networks around the world.

CPCA Wants to Share your Success Stories

If your company receives an award or special recognition, please inform CPCA!



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



SUSTAINABILITY

Laurentide Announces Technological Breakthrough with Unique **Single-Base Concept**

Quebec-based manufacturer Laurentide has unveiled a new line of paint dedicated to consumers that is inspired by a European approach. Laurentide's new technology will revolutionize the paint industry by replacing the traditional four-base system with a single base called Infinite Base. This technological breakthrough will be available for pre-order as of January 2021 offering a greatly simplified exclusive process where a single paint base can deliver all colours without compromising colour quality production. This also means reduction in inventory, space, costs, and dye optimization. The line will be available to consumers, painters and contractors in the spring of 2021.

Hempel Launchs Re-formulated Antifouling Technology

Hempel launched five new Oceanic and Olympic products to deliver additional benefits and choice within the existing antifouling product range. The new, reformulated products provides an even higher performance through an enhanced mechanical strength and better control of the leached layer. Higher volume solids, lower VOCs, and high dry film thickness per coat will areduce costs, time and emissions during application.

New AkzoNobel Solar Projects Support Sustainability Goals & Brazil Airlines Inspired by AkzoNobel's PPP Colours

Thousands of solar panels are installed at two AkzoNobel (AN) sites on two continents. These two projects are the latest in a series of solar projects around the world that aim to help AkzoNobel reduce energy use by 30% and move to 100% renewable electricity by 2030 as part of its "People. Planet. Paint." sustainability ambitions. AN is already using renewable electricity at 33 locations in eight countries and has already installed solar panels at 14 facilities. The new Brazilian Azul Airlines feature 58 colours of little blue Spix's macaw, a national symbol threatened for extinction and planned for reintroduction in the country. AN provided an increadible range of innovative colours with half of them being custom to bring the artwork to life.

Dow Named on the "Dow Jones 2020 Sustainability World Index" & **Releases its Carbon Partnership Report**

Dow was named to the Dow Jones Sustainability World Index (DJSI) by S&P Global, which is exclusively focused on sustainability investing. In its 2020 Carbon Subscribe Past Issues

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Movement.

PPG Recognized as One of America's Most Responsible Companies by Newsweek

The Newsweek list recognizes the 400 most responsible companies in the USA across 14 different industry subcategories. PPG, which ranked #13 in the Materials category and #130 on the overall list, continues to reduce the environmental impact of its operations; develop products that enhance customers' sustainability; engage with communities for a brighter tomorrow, and strengthen its global workforce. "Every day, our more than 47,000 employees are working to fulfill our company's purpose to 'protect and beautify the world," said Mark Cancilla, PPG vice president, environment, health and safety. "PPG's inclusion in the Newsweek America's Most Responsible Companies 2021 list underscores our progress and commitment to industry-leading environmental, social and corporate governance practices." Newsweek and its partner Statista evaluated 2,000 of the largest public companies by revenue in the U.S. in compiling the ranking. The analysis included a detailed review of publicly available performance data in the environmental, social and corporate governance categories, and a survey of 7,500 U.S. citizens about their perceptions of the companies related to corporate social responsibility. PPG, which ranked #13 in the Materials category and #130 on the overall list, continues to:

- · reduce the environmental impact of its operations
- · develop products that enhance customers' sustainability
- · engage with communities for a brighter tomorrow
- · strengthen its global workforce

Some of the notable achievements:

- · 33% of sales from sustainably advantaged products and processes
- 33% of manufacturing and R&D locations with zero landfilled process waste
- increased female representation to more than 30% of its total workforce, a 7% increase since 2014
- · invested \$6.8 million in support of science, technology, engineering

PPG is to be congratulated for such achievements.

Opportunities in Sustainable Coatings Highlighted

Frost & Sullivan's Changing Construction Practices Transforming the Global Construction Coatings Market, 2020 advises coating manufacturers to focus on tailored products for prefabricated construction, to strengthen capabilities to address local needs, and to invest in durable waterborne coatings for greater environmental sustainability.

Sustainability and Circular Economy Transforming Global Construction Adhesives & Sealants Technologies

In recent times, there has been a rising focus by construction adhesive and sealant manufacturers to develop products that would favour the circular economy and promote sustainability as green alternatives. Additionally, EHS standards and regulations have been encouraging the use of more environmentally friendly products with mandates on cutting down of formaldehyde or isocyanate based chemistries.

The Race to Save the Planet: Can Companies Help the World Hit Net Zero in Time?

The UN Environment Programme's 2020 Emissions Gap report recently warned that the world is heading towards a 3C rise this century, leading to mass extinctions and rendering swathes of the planet uninhabitable. The report calls for a threefold increase in ambition levels compared with the Paris accord to keep to a 2C pathway. Net-zero targets are the new 'world peace'. The business community will lead a rigorous new standard developed by the SBTI and the World Business Council for Sustainable Development which is restricted to companies that have set a 1.5C science-based target by 2022.

Additional Readings

- A Sustainable Monomer for the Production of Bio-based Polyacrylates
- IISD Launched New Publication: Trade and Sustainability Review
- Global Green Coatings Industry to Reach US\$124B by 2027
- · Optimizing the Pathway to Low-Carbon

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TECHNOLOGY & INNOVATION

Antimicrobial Acrylic Coating Modified with Guanidinium Oligomer

This coating retains an excellent antimicrobial property even after being laundered with a detergent solution.

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Nouryon Launches Ingredient to Improve Antiviral Paint Sustainability and Quality

Arquad GS is an innovative, environmentally friendly antimicrobial agent that enables the formulation of a robust and tintable antiviral paint. It is designed to partially or fully replace traditional in-can preservative and anti-microbial agents.

Novel Metal-organic Framework Nanosheets Developed for Anticorrosive Coating

A marine functional materials group has successfully prepared ultrathin 2D metal-organic framework (MOF) nanosheets that enhanced anticorrosion properties of composite coatings.

Moth Eye Inspires Antireflective Coating

Tokyo researchers are attempting to mimic the nanoscale arrayed surface of moths' eyes to create antireflection structures for coatings. Moth' eyes have evolved in non-reflective nanoscale structures that protect them from predators. These rough structures cause incident light to bounce around in random directions and be transmitted into the eye rather than reflect off it.

First-Ever Electricity-Generating Flexible Glass Using High-Speed Manufacturing Process

As thin as a business card, flexible sheets of SolarWindowTM electricity-generating glass generate power from sunlight and indoor.

New Nanomaterial Device Can Blow Hot or Cold

Engineers have demonstrated a dual-mode heating and cooling device for climate control in buildings, which, if widely deployed in the US, could cut HVAC energy use by nearly 20 per cent. About 30 per cent of global energy consumption globally is from the heating and cooling of buildings, which accounts for about 10 per cent of global GHG emissions.

Additional Readings

- Battling COVID-19 Using UV light
- · Ultra-Thin Coating Aids in Photodetector Research
- Recent Advances in Graphene Oxide-Based Anticorrosive Coatings: An Overview

ECONOMIC NEWS

Conference Board of Canada: Record-high Debt a Long-term Concern for Governments in Canada

The economic crisis caused by the pandemic will leave long-lasting scars for many Canadian industries, and take a heavy toll on the finances of governments at all levels. Getting to the end of 2021 will be difficult for many businesses, and support programs will continue to drain the coffers of the federal and provincial/territorial governments. The debt levels of all Canadian governments will rise sharply until 2024. Over the medium term, governments will struggle to balance their books, despite relatively low-interest rates, while a longer-term perspective suggests that, on aggregate, the situation for provinces/territories is untenable.

COVID-19: Deficits Have Ballooned with Little Regard for How It's All Going to be Paid Back

According to EDC, this pandemic redefined recession and stimulus. Gone for the moment are sustainable debt and deficit targets, even among their staunchest guardians. Europe considered a 60% debt-to-GDP ratio as manageable in the long term. Today, not even France and Germany are close. According to the OECD, the USA left that marker in the dust a decade ago, and when the dust has settled on the

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redefined acceptable public debt limits-for now.

Reality Check: 80 Percent of Canadian Manufacturers and Exporters Surveyed Facing Immediate Labour and Skills Shortage

The CME recently surveyed 563 companies across 19 sectors. The skills gap that existed before the pandemic has now been exacerbated. CME found that 70 per cent of manufacturers had a shortage of labour and skills in 2018, up from 40 per cent in 2016. All manufacturers were forced to adapt quickly to protect their staff from COVID-19. The average PPE purchasing costs are expected to reach \$373,400 by the end of 2020.

New Canada's Climate Plan for 2030 GHG Emissions and Net-zero by 2050

The plan aims commits \$15.2 billion on top of the \$60 billion previously allocated to implement the Pan-Canadian Framework on Clean Growth and Climate Change. Overall, the plan contains 64 updated and new policies, programs and spending measures to meet GHG reduction targets. Starting in 2023, the price of carbon will rise by \$15/tonne per year to \$170/tonne by 2030. Canada will invest \$287 million until March 2022 to continue the Incentives for Zero-Emission Vehicles program and \$150 million over three years in charging and refuelling stations across Canada. Starting in 2021, the feds will conduct Canada's first-ever national infrastructure assessment, to help identify needs and priorities in the built environment toward a net-zero emissions future.

CCOHS New Tool Identifies Workers at Higher Risk of Cancer and Other Diseases

The use of this new interactive Ontario Occupational Disease Statistics tool from the Occupational Cancer Research Centre allows exploring risks of disease among Ontario workers.

Canadian Economic Indicators

Auto Sales Fall 10.4% in November

The sales of cars and trucks fell in November as COVID-19 restrictions returned with 128,351 cars and trucks sold, down 10.4 per cent from a year ago. This decline marks a pullback from strong performances in September/October but is still relatively strong compared to Spring.

Additional Readings

- ASI Buyers' Guide, December 2020
- Class 8 Fuel-cell Electric Trucks Arriving in LA
- Teleworking: What are the Allowable Expenses for Employees and Tax Impacts for Employers?
- UK-REACH Soon to Apply: Key Principles of the EU REACH Regulation Retained, but no GB-CLP Draft Available Yet

Speech/Webcast:

- 2020-2021, and Deputy Commissioner, Deceptive Marketing Practices Directorate, Competition Bureau: Consumer Protection in Unpredictable Times: Borderless challenges Call for Borderless Solutions
- Commissioner of Competition Meeting of the Standing Committee on Industry:
 Protecting Canadians During the Pandemic and Driving Economic Recovery



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

INTERNATIONAL NEWS

CPCA has compiled international market research reports in the following market segments:

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- · Insulation coatings
- · Construction adhesives
- · Medical adhesives
- High Temperature sealants
- Surgical sealants
- Hot-melt adhesives
- Wind energy adhesives
- Paint additives
- · Solvent-based additives;
- And more...

See Other CPCA Statistics and Research for Members



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

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