



Australian Paint Manufacturers' Federation Inc.



2021
Annual Report



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Australian Paint
Manufacturers' Federation Inc.

2021 Annual Report

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Notice of Annual General Meeting

NOTICE IS HEREBY given that the 64th Annual General Meeting of the Australian Paint Manufacturers' Federation Inc will be held on 16 November 2021, commencing at 2:45 pm via Microsoft Teams.

Michael Paag
Public Officer
15 October 2021

Agenda

1. Apologies
2. Minutes of Annual General Meeting of 17 November 2020
3. Annual Report for 2020/21
4. Annual Accounts for 2020/21
5. Appointment of Members of Council in accordance with Clause 18 of the Constitution
6. Election of up to two other Members in accordance with clause 19 of the Constitution
7. Any Other Business.

Proxies

A Member is entitled to appoint another Member as a proxy by notice given to the Secretary no later than 24 hours before the time of the meeting.



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THE AUSTRALIAN PAINT Manufacturers' Federation Incorporated (APMF) was established in 1947. Today, its principal purpose is to improve the economic, societal and environmental contribution of Australian paint and coatings manufacturers on behalf of members, and for the benefit of the Australian community.

The Australian paints and coatings industry produces some \$2.7 billion of surface coating products, directly employs about 6,500 people, and supports Australia's 51,000 trade paints and number other jobs in retail, distribution, design and architecture, and infrastructure. The APMF represents 24 companies, and our members account for approximately 90 percent of all of the paints manufactured in Australia. The APMF is a not-for-profit industry association.

The APMF is governed by a National Council representing both small and large manufacturers. The APMF provides a range of services in the health, safety, environment, packaging, distribution storage, logistics and technical areas. The APMF is the chief industry advocate for the state and federal governments, and various statutory authorities.

The Federation also fulfils a vital function in advising members of changes to relevant legislation and regulations, and in representing members' concerns to relevant regulatory agencies. Relevant statistical reports and analyses are available and circulated to members.

To guide the development of the industry initiatives and responses to issues that might impact the industry and broader community, the APMF is assisted by various committees, including the Health, Safety, Environment, Logistics and Technical Committee, and Working Groups such as those working on projects like the review of agricultural and veterinary chemical regulation, and the Australian Paint Approval Scheme (APAS).

About the APMF

The APMF is also a member of the World Coatings Council (WCC), and is a founding member of the Asia Paint Industry Council (APIC). The WCC was established in 1992 to give our industry the opportunity to discuss and analyse industry issues and their global implications, as well as to coordinate the development of the industry's policy responses to international bodies and governments. APIC concentrates on the exchange of information between local paint industries.

Finally, the APMF holds one of the four industry representative seats on the Strategic Consultative Committee established under the Australia Industrial Chemicals Introduction Scheme (AICIS), and sits on numerous Australian Standards Committees.

In 2019, the APMF entered into a strategic partnership with Chemistry Australia. Under that partnership, Chemistry Australia has assumed responsibility for the day-to-day administration of the APMF. The two associations work closely together on industry and regulatory policy matters. APMF members also have access to a wider range of services and expertise provided through Chemistry Australia.

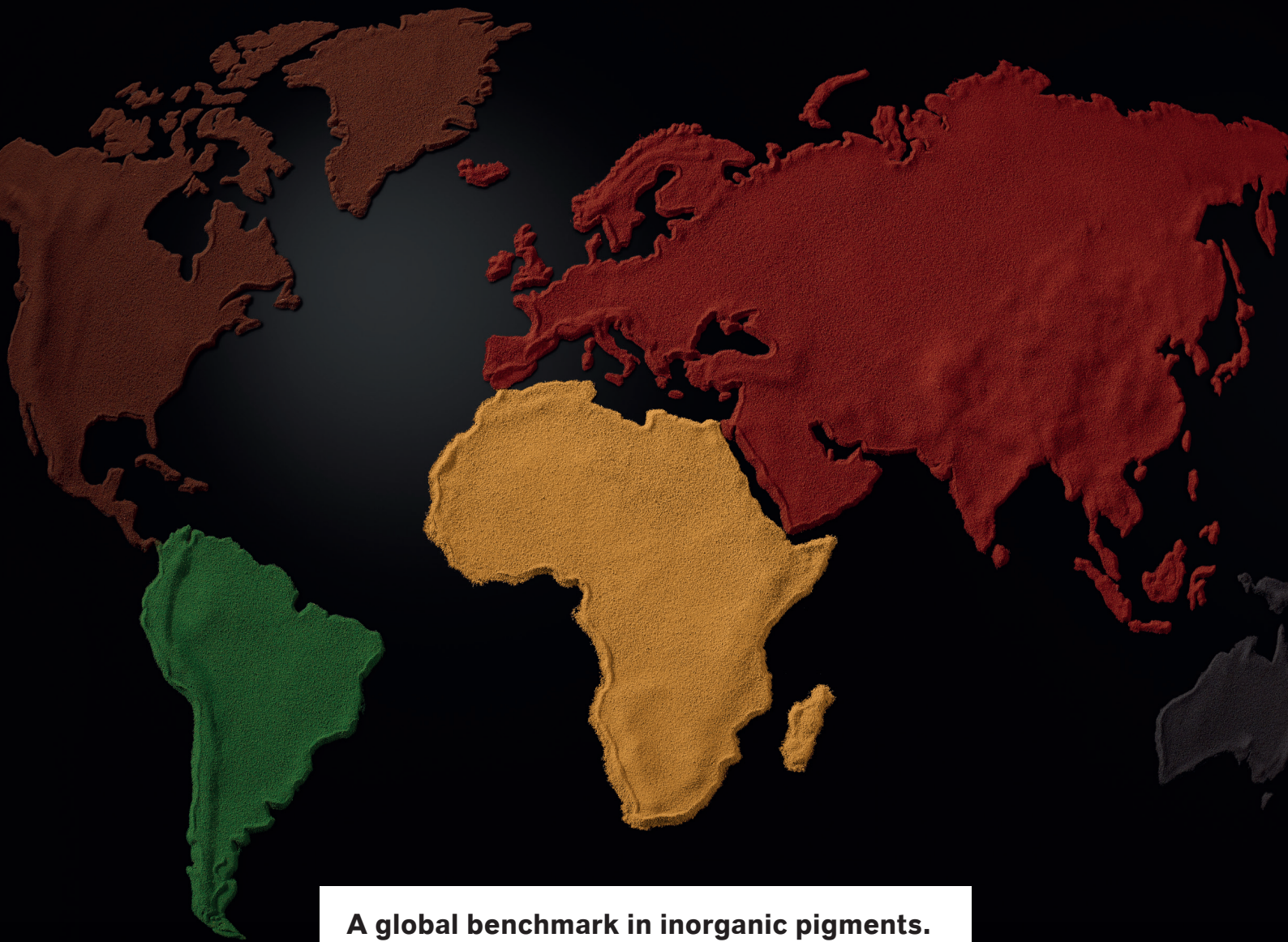


Members of the Council

MEMBERS OF COUNCIL 30 JUNE 2021

NAME	POSITION	COMPANY
Pat Jones	Chairman	DuluxGroup
Michael Sparrow	Member	PPG
Rodney Walton	Member	Haymes Paints
Jamie O'Brien	Member	Akzo Nobel
Zhao Ming Dong	Member	Jotun
Michael Paag	Member	Concept Paints
Matthew Crossingham	Member	Hempel (Wattyl) Australia

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30 June 2021

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Akzo Nobel Pty Ltd
Astec Paints Australasia Pty Ltd
Bondall Marketing Pty Ltd
Cameleon Coatings
Colormaker Industries Pty Ltd
Concept Paints
Dulux Australia
Haymes Paints
Hempel (Australia) Pty Ltd
ITW Polymers & Fluids
Jotun Australia Pty Ltd
Lacnam Paints Australia
Mirotone Pty Ltd
PPG Industries Australia
Roberston's Paints
Signet Pty Ltd
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Chairman's Report

THE LAST YEAR has been challenging for the world, Australia, local communities and our industry, with COVID continuing to impact throughout the entire period. Extended lockdowns and the disruption caused by COVID have prevented renovation and construction activity in New South Wales and Victoria, and have curtailed retail activity. This has impacted trade painters and DIY home renovators, and is reflected in the 5.7 percent reduction in the volume of paint sold in the first 6-months of 2021 compared to the same period in 2020.

As the 2020/21 financial year drew to a close, restrictions were increasing; however, at the time of writing this report, there was increasing optimism that with high vaccination rates, life and business were on track to return to normal.

The 2020/21 year has been a busy period for the APMF, providing ongoing assistance to members to keep them up to date with developments relating to COVID and their impact operations, and making representations on behalf of the industry to governments as they sought to formulate their response to the virus.

On the regulatory front, there have also been many developments, including the transition from the National Industrial Chemicals Notification and Assessment Scheme (NICNAS) to the Australian Industrial Chemicals Introduction Scheme (AICIS) on 1 July 2020, AICIS cost recovery, the implementation of the outcome of chemical reviews by the Department of Health, several poison scheduling consultations, the Commonwealth Industrial Chemical Environmental Management legislation, and the review of workplace exposure limits by Safe Work Australia.

The Federation continues to work with the CSIRO to ensure that the Australian Paint Approval Scheme (APAS) adds value and serves the needs of paint manufacturers and consumers.

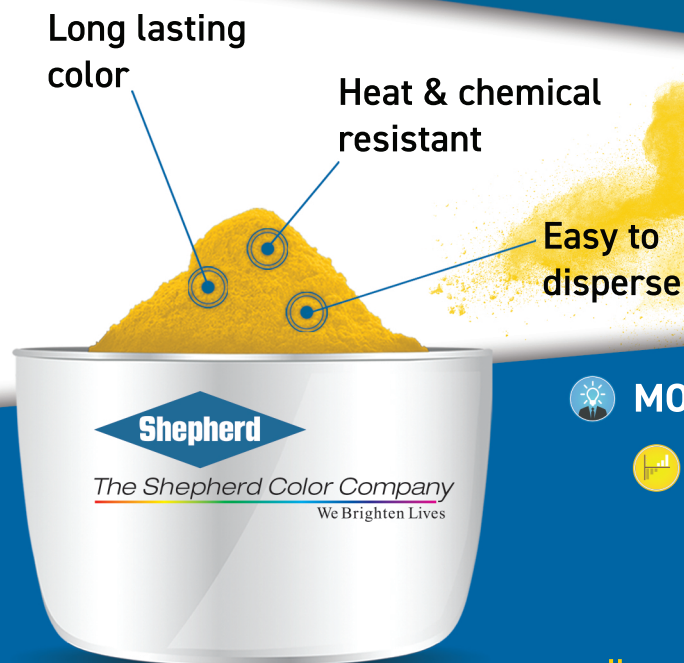
I want to take the opportunity to thank you for your continuing support of the Federation. Looking at regulatory developments in key economies globally, a strong and effective voice representing Australia's paint manufacturers is critical to ensure that governments and regulators are fully informed as they consider regulatory changes.

Finally, I would like to thank Bernard Lee, our Executive Officer, for his work on behalf of the members during the year.

I wish you all the best for the coming year. Stay safe.

Pat Jones
Chairman

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- We connect chemistry on all levels by offering global connections and local service.

Executive Officer's Report

THIS REPORT DETAILS the Federation's main activities over the past 12 months to 30 June 2021.

As the Chair has noted in his Report, COVID has dominated the last year. Monitoring ongoing developments on behalf of Members and ensuring that governments understood the full implications of any proposed response to the virus have been critical for the industry and our customers. Fortunately, paint manufacturing has continued throughout the COVID period thanks to the critical role the industry plays across the economy and the measures taken by members to prevent the spread of the virus in their workplaces; however, with construction, renovation and retail

activities significantly curtailed in the last half of 2020/21, our customers have been significantly impacted.

On the technical front, we continue to work on issues related to biocides, the new Australian Industrial Chemical Introduction Scheme (AICIS), the Industrial Chemicals Environmental Management Register legislation, and the review of workplace exposure limits by Safe Work Australia.

Looking at 2021/22, in addition to working on our industry awareness campaign, the Federation will be focusing on the following issues:

- The operation, scope and strategic direction of the Australian Paint Approval Scheme managed by the CSIRO.
- The Safe Work Australia review of workplace exposure limits (WELs), which is proposing significant changes to WELs for substances present in certain paints and coatings, including acrylonitrile, chromium IV, isocyanates and titanium dioxide. These proposals have the potential to impact workplaces engaged in paint and coatings manufacturing, distribution and application.
- Poison Schedule – isothiazolinones and lead as a low-level contaminant in anti-corrosive and anti-fouling paints.
- Making sure the new AICIS delivers fully on the promised reforms.
- The Industrial Chemicals Environmental Management legislation, including its adoption in each state and territory jurisdiction.
- The National PFAS Position Statement, including PFAS and precursor substances used in paints and coatings.

The World Coatings Council (WCC) continues to address many of the same issues in global fora on behalf of the industry.

Finally, I have enjoyed meeting and working with you all over the last year, and look forward to working with you over the coming year. I am sure that there will be many challenges as the economy and community endeavours to recover from the impacts of COVID-19.

Bernard Lee
Executive Officer



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Contract manufacturing to customer requirements is a significant part of our business at Cameleon, and we work closely with all customers to ensure that we manufacture products in accordance with their intellectual property and other quality specifications. We package and label all products according to customer guidelines and can provide a range of solutions in relation to raw materials, packaging, labelling and logistics.

As we work closely with our customers, we have in many instances advised them of additional product range opportunities and developed product extensions that have proved highly successful to their business operations.

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Health, Safety, Environment, Logistics and Technical Committee (HSELT) Report

THE HEALTH, SAFETY, Environment, Logistics and Technical Committee has been quite active over the last year responding to several regulatory issues and consultations. As a result, the Committee has increased the frequency of meetings to provide greater opportunity for members to network and discuss developments impacting the industry.

The Committee's terms of reference focus on reducing workplace injuries and the industry's impact on the environment. The Committee also maintains an overview of, and participates in the development of, the legislation, standards, codes of practice and other regulations that impact the paints and coatings industry. It develops policies and strategies to advance the interests of paint makers for both industrial and consumer products, acting as a focal point for the industry in addressing technical issues that may arise from time to time, which may impact the formulation of paints that they manufacture and/or use.

During the 12 months ending 30 June 2021, the Committee considered, discussed and responded to:

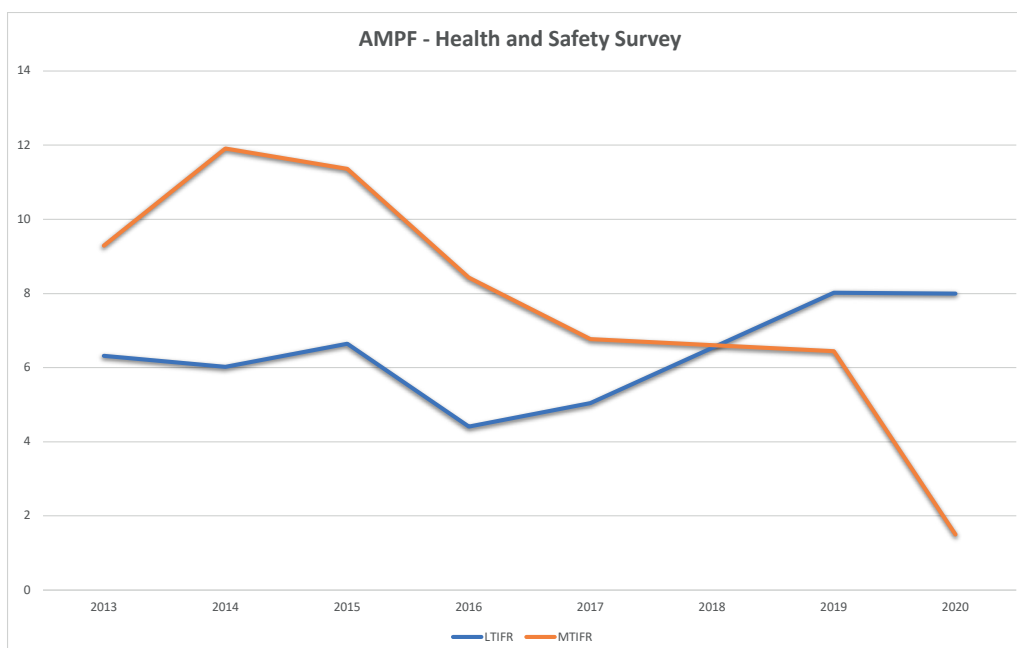
- Safe Work Australia's review of workplace exposure limits (WELs)

- proposed changes to the Poison Schedule for isothiazolinones and lead in paints
- the Matthews' Review of Agvet Chemical Regulation, including the proposal to remove antifouling paints from the scope of products regulated by the Australian Pesticide and Veterinary Medicines Authority (APVMA)
- consultations by the Commonwealth Department of Health on changes to the Australian Industrial Chemical Introduction Scheme (AICIS)
- the draft Cost Recovery Impact Statement (CRIS) for the AICIS.

Responding to the rapidly developing COVID-19 situation, the Committee held a virtual meeting for members to discuss and share information regarding the workplace practices that they were adopting to address and reduce the risk of the virus spreading in their workplace.

Working Groups continued to work on issues associated with the Matthews' review of Agvet Chemical Regulation and the Australian Paint Approval Scheme.

2019 - APMF Health and Safety Survey



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MTIFR is the medical treatment injury frequency rate per million hours worked.

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Snapshots of the Coatings Industry in Australia

Architectural and Decorative (A&D), including wood care products

- Decreased 1.8 percent in 2019
- Increased 0.2 percent in 2020
- Increased 0.6 percent in 2021.

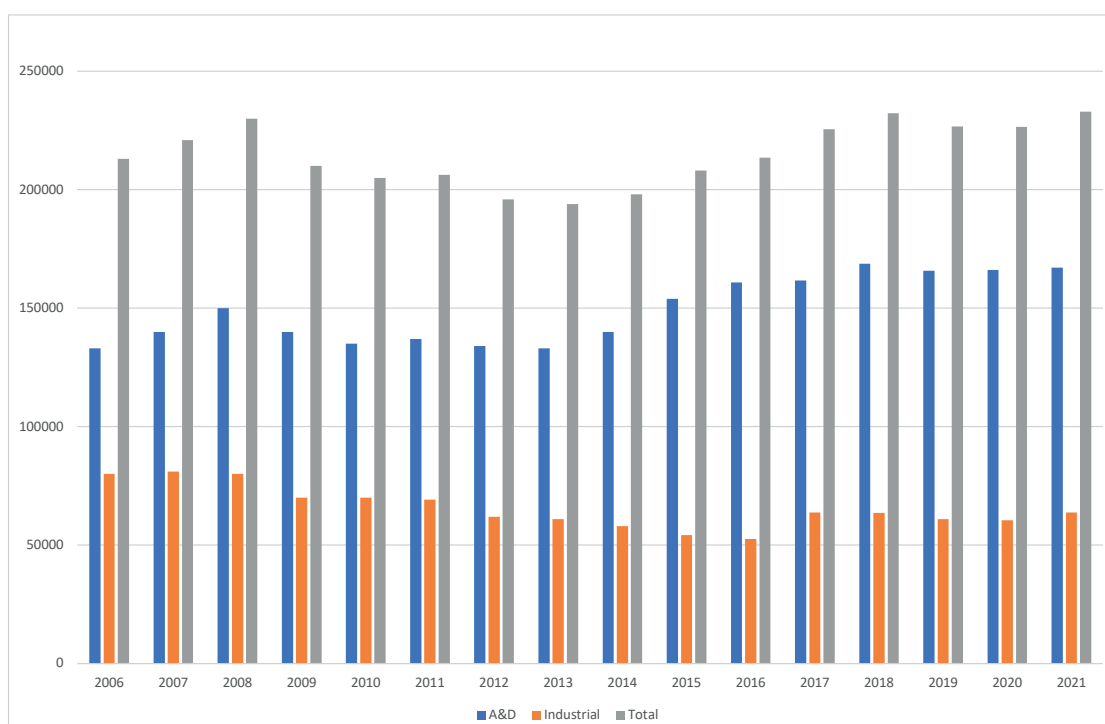
Industry Aggregates - A&D plus Industrial

- Decreased 2.4 percent in 2019
- Decreased 0.1 percent in 2020
- Increased 2.9 percent in 2021.

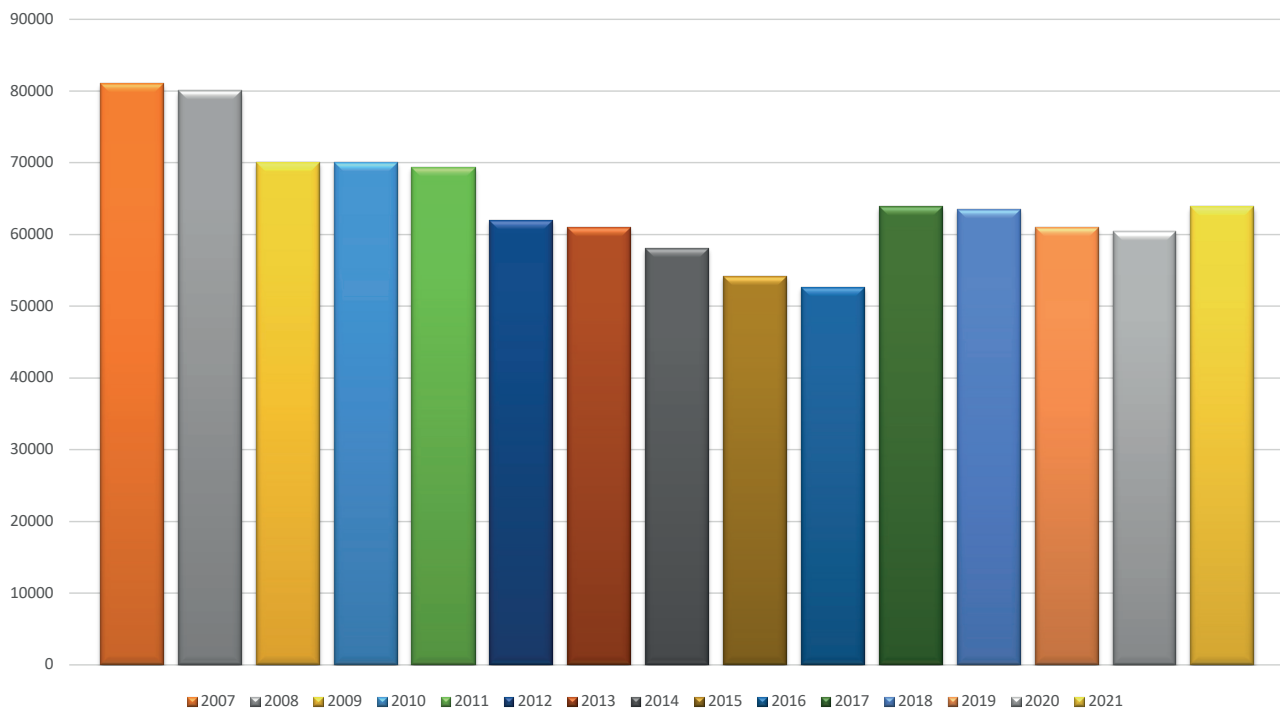
Industrial Sales

- Decreased 4.1 percent in 2019
- Decreased 0.8 percent in 2020
- Increased 5.6 percent in 2021.

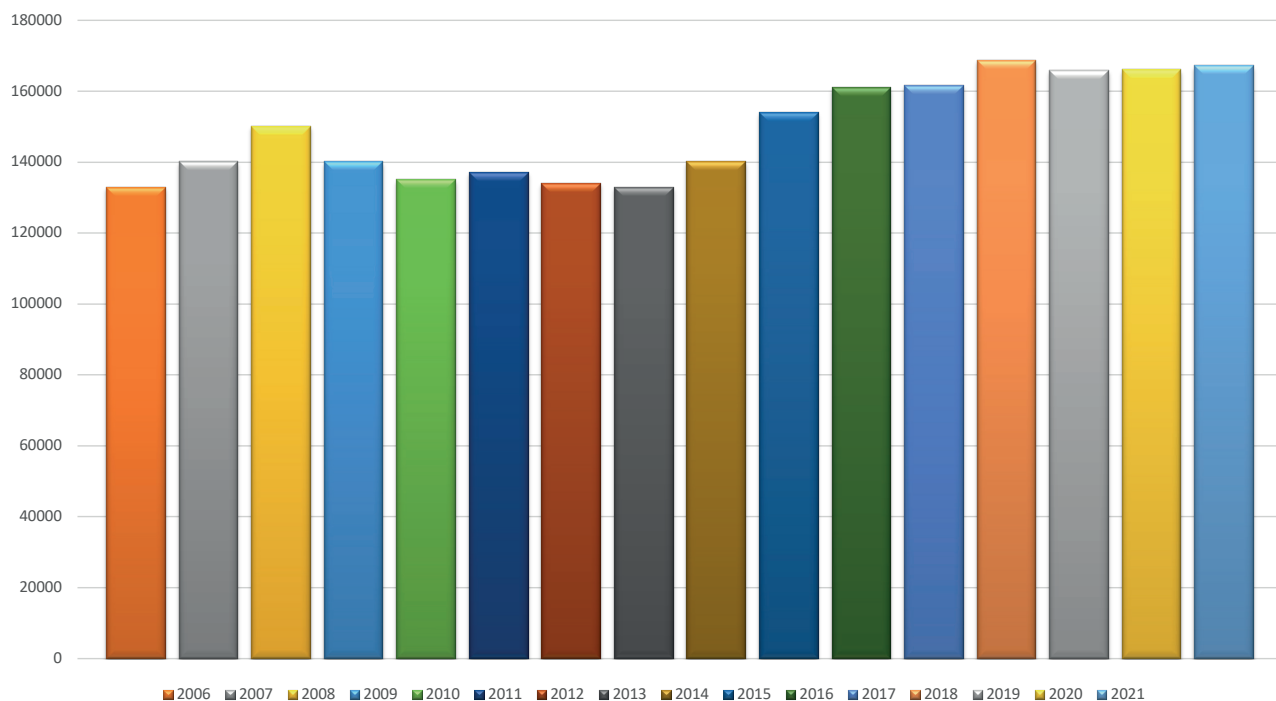
Sales: Architectural & Decorative (including wood care) and Industrial



Industrial Sales



Architectural & Decorative (including wood care)



Strategic Plan 2020–2023

Our mission

To improve the economic, societal and environmental contribution of Australian paint and coatings manufacturers on behalf of its members, and for the benefit of the Australian community.

Our primary functions

PROMOTE	the industry and the contribution it makes to Australia.
REPRESENT	members through a collective voice on matters of importance to the industry, members and Australians.
EDUCATE	members, consumers, governments, regulators and the community in general on all matters relevant to the sector.
INFLUENCE	decision-makers and influencers in supporting the pursuit of excellence in the ongoing advancement of the sector.

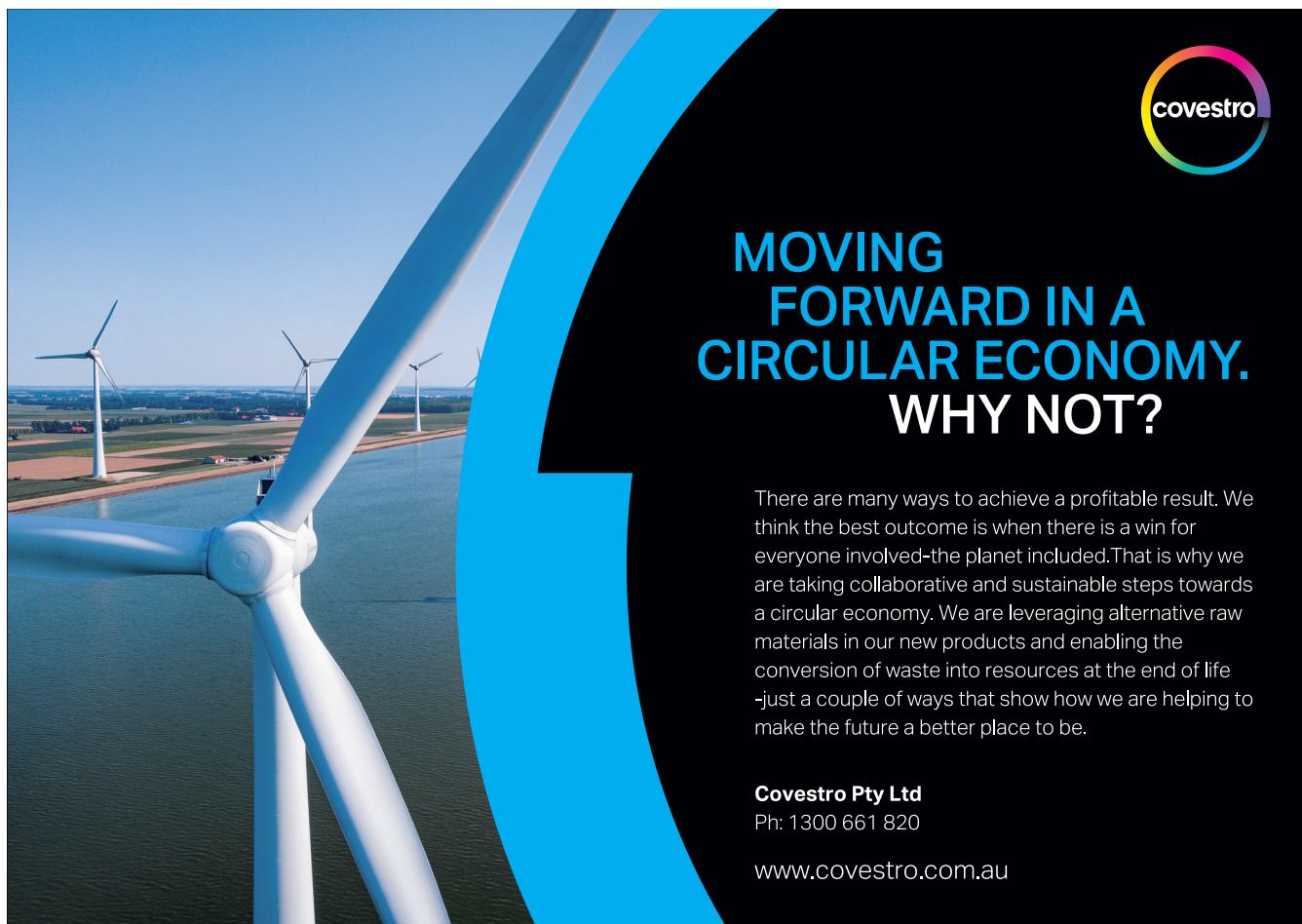
These primary functions will seek to maximise opportunities for, and address challenges confronting, the paint and coatings sector in Australia.


Our strategic priorities

OUR MEMBERS	<p>We will represent and service our members through:</p> <ul style="list-style-type: none"> • better understanding of individual and collective member needs • advocating on important issues • ongoing education and collaboration through collective local knowledge sharing • accessing and sharing global knowledge • providing sound governance and exemplary leadership.
OUR STAKEHOLDERS	<p>We will build and maintain effective relationships with:</p> <ul style="list-style-type: none"> • governments – federal and state • regulators – federal and state • non-government organisations across Australia • influencers across Australia • the education system – universities and students • media – traditional and contemporary.
OUR ALLIANCES	<p>We will generate mutual value through:</p> <ul style="list-style-type: none"> • leveraging our relationship with Chemistry Australia • cultivating more formal relationships with associated industry bodies.
OUR CONSUMERS	<p>We will preserve our social licence in order to support industry and member sustainability, and generate value and benefits for our communities.</p>

2020-2023 initiatives

ONGOING	
Policy and regulation	Key areas of focus include: <ul style="list-style-type: none"> • HSELT – continuing our work in the areas of health and safety and the environment • Waste management – exploring opportunities to address this key industry challenge • Energy supply and cost – work with key stakeholders to mitigate the ever-increasing risk in this business input.
Alliances	To attract and retain the best professional staff, establish and nurture a relationship/s with a key university/s to promote opportunities for STEM students and projects in the paint and coatings sector.
REPOSITIONING THE FEDERATION	
Industry profile	Undertake a specific project to determine, quantify and articulate the paint and coatings sector's contribution to the Australian economy.
Pathway to influence	Leverage our relationship with Chemistry Australia to identify, establish and nurture relationships and networks with Ministers, Senators, Members and Regulators at both federal and state government levels.
Communication	Develop and implement appropriate strategies to effectively communicate with members, consumers and key stakeholders on an ongoing basis.





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