



Australian Paint Manufacturers' Federation Inc.



# 2022

Annual Report

A collage of various architectural and interior design images, including modern buildings, colorful interiors, and outdoor spaces, arranged in a grid-like pattern. The images show a mix of modern architecture, interior spaces with bold colors (red, green, blue, yellow), and outdoor areas like pools and terraces. The collage is set against a background of white squares of varying sizes.

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Australian Paint  
Manufacturers' Federation Inc.

**2022 Annual Report**

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# Notice of Annual General Meeting

**NOTICE IS HEREBY** given that the 65th Annual General Meeting of the Australian Paint Manufacturers' Federation Inc. will be held on 29 November 2022, commencing at 3.45 pm at Paintback, South West Suite, Level 3, 717 Bourke Street, Docklands, Victoria 3008.

**Michael  
Public  
2 November 2022**

**Paag  
Officer**

## Agenda

1. Apologies
2. Minutes of Annual General Meeting of 16 November 2021
3. Annual Report for 2021/22
4. Annual Accounts for 2021/22
5. Appointment of Members of Council in accordance with Clause 18 of the Constitution
6. Election of up to two other Members of Council in accordance with Clause 19 of the Constitution
7. Appointment of Auditor
8. 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.



# About the APMF

**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 paint and coatings industry produces some \$2.7 billion of surface coating products; directly employs about 6500 people; and supports Australia's 51,000 trade painters and many other jobs in retail, distribution, design, architecture, and infrastructure. The APMF represents 24 companies, and its members account for approximately 90 percent of all the paints manufactured in Australia. The APMF is a not-for-profit industry association.

The APMF is governed by a Council, representing 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 APMF also fulfils a vital function in advising members of changes to relevant legislation and regulations, and in representing members' concerns to applicable 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).

The APMF is also a member of the World Coatings Council (WCC) and a founding member of the Asia Paint Industry Council (APIC). The WCC was established in 1992 to give the 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 broader range of services and expertise provided through Chemistry Australia.

# Celebrating 75 Years

## **PAINT MANUFACTURING COMMENCED**

in Australia in the 1850s. The earliest records of paint-based industry associations, going back to 1925, exist in the minute books of the Paint and Varnish Manufacturers section of the Chamber of Manufactures of New South Wales. The section had clearly been in existence for some years, and there is evidence that, since the beginning of the 1900s, the Chamber of Manufactures in Victoria, Queensland and other states had similar sections.

The minutes of 21 May 1925 tell us that the section was reorganised to consist of three subcommittees. The No. 1 and No. 2 committees were to form part of the paint and paint oils section, and the No. 3 Committee was to operate with the varnish and enamels section.

- The No. 1 Committee was to focus on paint oils, thinners, pigment strainers, inert fillers, mixed paints and paint removers.
- The No. 2 Committee was responsible for standard methods of testing, nomenclature, and the precautions to be taken in the manufacture and use of paints.
- The No. 3 Committee was to concentrate on varnish oils, thinners, gums, resins, and varnish removers, and their labelling and standard methods of testing.

In a ballot, the following were elected as members of the respective committees:

- No. 1 Committee: Mr H.J. Barncastle and Mr H.G. Taubman
- No. 2 Committee: Mr R.F. Boan and Mr J. Bishop
- No. 3 Committee: Mr F.S. Hatrick and Mr H.J. Sullivan.

In May 1933, the section appears to have been reconstituted as an association in its own right. At that

meeting, it was resolved that members should be asked to contribute 'one guinea per head, per year to meet incidental expenses and that only those who contribute the guinea may be recognised as members of the association'. It was further resolved that an account be opened in the name of the 'Paint, Varnish and Lacquer Manufacturers' Association of New South Wales at the Bank of New South Wales' and the signatories be any two of the Chairman, Mr H.J. Barncastle; the Secretary, Mr F.L. Edwards; and Mr C.P. Taubman of Sterling Varnish Limited and Taubmans Limited.

It is interesting to note that some of the names we find in the minutes of those early meetings, such as Taubmans, are still with us today as paint brands. In 1947, the Australian Paint Manufacturers' Federation Inc. (APMF) was formed, and its first executive director was appointed in 1957.

Some 30 years later, in December 1985, a decision made for economic and rationalisation purposes saw the last vestiges of the federal structure disappear. The sections, which still existed in Victoria, Queensland, South Australia and Western Australia, were closed down, and since then, the APMF has only had offices in New South Wales.

In 2019, the Federation entered into a strategic partnership with Chemistry Australia. Under the terms of that partnership, Chemistry Australia undertakes the day-to-day administration of the Federation. APMF members also enjoy the full benefits of Chemistry Australia membership and the broader range of skills and expertise available. The Federation, nevertheless, retains its unique identity, and its rich history as a major contributor to the colour of Australian life for more than 75 years.

# Members of the Council

## MEMBERS OF COUNCIL 30 JUNE 2022

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

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## 30 June 2022

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Haymes Paint  
Hempel (Wattyl) Australia Pty Ltd  
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- We connect chemistry on all levels by offering global connections and local service.

# Chairman's Report



**AS THE 2020/21** financial year ended, there was increasing optimism that life and business were on track to return to normal by the end of 2021, following 18 months of disruption and upheaval caused by COVID-19. Things did not quite go to plan. COVID-19 restrictions continued to impact every facet of daily life and business well into 2022. As I write this year's Chairman's Report, the COVID-19 crisis has passed, but its impacts on supply chains continue to linger.

Our milestone 75th year has been challenging for APMF members. Raw material shortages, escalating prices, and widespread flooding in New South Wales and Queensland have impacted operations and sales. Several categories of industrial coatings experienced significant declines in 2021/22. Sales of architectural and decorative paints also experienced a slight decline in 2021/22.

The 2021/22 financial year has been a busy period for the APMF. On the regulatory front, the end of the Australia Industrial Chemicals Introduction Scheme transitional arrangements has presented challenges for the industry and its key suppliers, diverting resources to regulatory issues. On the environmental front, the Federation is assisting the Commonwealth Department of Agriculture, Water and Environment to develop the framework for the new Industrial Chemicals Environmental Management Scheme (IChEMS).

Sustainability continues to be a significant focus for the industry across the globe. Paintback®, the industry-led sustainability scheme established by the APMF in 2016, continues to grow, setting an example for the industry in other countries.

Again, I want to take the opportunity to thank you for your continuing support of the Federation. Seventy-five years of ongoing industry commitment to the Federation is a significant achievement. As I noted last year, with regulatory developments impacting the industry in Australia and 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.

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

I wish you all the best for the coming year.

**Pat Jones**  
Chairman



# Executive Officer's Report

**THIS REPORT DETAILS** the Federation's main activities over the past 12 months, to 30 June 2022.

As the Chair has noted in his Report, COVID-19 has continued to impact the work of the APMF during the 2021/21 financial year. As a result, all of the Federation's committee, Working Group meetings, and Annual General Meeting took place online. With the exception of the last Council meeting in June 2022, the Council also met online during the year.

Our focus over the past year has related to poison scheduling; the Australian Industrial Chemical Introduction Scheme (AICIS); the Industrial Chemicals Environmental Management Scheme (IChEMS); workplace health and safety, including the Globally Harmonized System of Classification and Labelling of Chemicals (GHS); dangerous goods transport and storage; and the review of workplace exposure limits by Safe Work Australia.

The Health, Safety, Environment, Logistics and Technical (HSELT) Committee report includes a more in-depth discussion of all these issues.

Looking to 2022/23, much of the Federation's focus will be on establishing relationships with the new Federal Government, as well as promoting awareness of the paints and coatings industry, and its essential role in the economy.

A range of regulatory issues confronts the industry across the globe, including biocide use in water-based paints, microplastics, PFAS and product stewardship. Through our participation in the World Coatings Council (WCC), the APMF can gather crucial insights based on the experience of other paints and coatings associations, and leverage its work on behalf of the industry in global fora, including the United Nations and its agencies.

Finally, I look forward to catching up with many of you in person in the coming months as we reconnect after the prolonged COVID-19 period.

Thank you for your continued support of the Federation.

**Bernard Lee**  
Executive Officer





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



**THE HEALTH, SAFETY,** Environment, Logistics and Technical (HSELT) Committee has remained active during 2021/22.

The Committee's terms of reference focus on reducing workplace injuries and the industry's environmental impact. The Committee also maintains an overview of and participates in developing 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 sector in addressing technical issues that may arise from time to time, which may impact the formulation of paints it manufactures and/or uses.

During the 12 months ending 30 June 2022, 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 as a low-level contaminant in anti-corrosive and antifouling paints
- consultations by the Commonwealth Department of Health on changes to the Australian Industrial Chemical Introduction Scheme (AICIS)
- dangerous goods transport and storage legislation changes in Victoria and New South Wales
- the classification of water-based paints as dangerous goods under International Maritime Dangerous Goods Code, due to the presence of biocides in their formulation.

The Committee also assisted the Commonwealth Department of Agriculture, Water and Environment (DAWE) to develop the first draft industry exposure scenario analysis under the IChEMS.

Responding to members' concerns about several significant impacts resulting from the end of the transitional arrangements intended to smooth the transition from the National Industrial Chemicals Notification and Assessment Scheme (NICNAS) to AICIS, the Committee and APMF members provided critical input on the nature of those impacts. This work formed the basis of a comprehensive submission to the Commonwealth Department of Health, proposing an extension of the transitional period or amendments to the Industrial Chemical Rules.

Significant confusion was caused by the circulation of additional proposals to amend the poison schedule for lead as a low-level contaminant in anti-corrosive and antifouling paints in December 2021, following a decision on the same issue announced in September 2021.

Australia led the world in eliminating lead as a raw material in paints more than 50 years ago; however, lead is a low-level contaminant in the zinc and copper used to produce anti-corrosive and antifouling paints.

With many countries still permitting the use of lead as an ingredient in paint, the United Nations Environment Programme is promoting the adoption of model laws that limit lead levels to 90 parts per million for all paints, other than antifouling. In September 2021, the Commonwealth Department of Health nevertheless decided to extend the 90 parts per million limit to antifouling, ignoring industry concerns and overruling the decision of Australia's specialist antifouling regulatory agency – the Australian Pesticide and Veterinary Medicines Authority (APVMA). As a result, most antifouling paints currently available in Australia will be banned from 1 October 2023, unless the decision is withdrawn. This will significantly impact Australia's commercial fleet, the shipbuilding and repair sector, and leisure craft. It also increases the environmental risks associated with invasive species.

The HSELT Committee continues to raise awareness of the impacts of the poison scheduling decision on antifouling paints. It seeks to have the decisions regarding the use, availability and composition of antifouling paints left to the APVMA.

With the global awareness of sustainability issues for the paints and coating sector growing, the HSELT Committee has decided to focus on sustainability in 2022/23.



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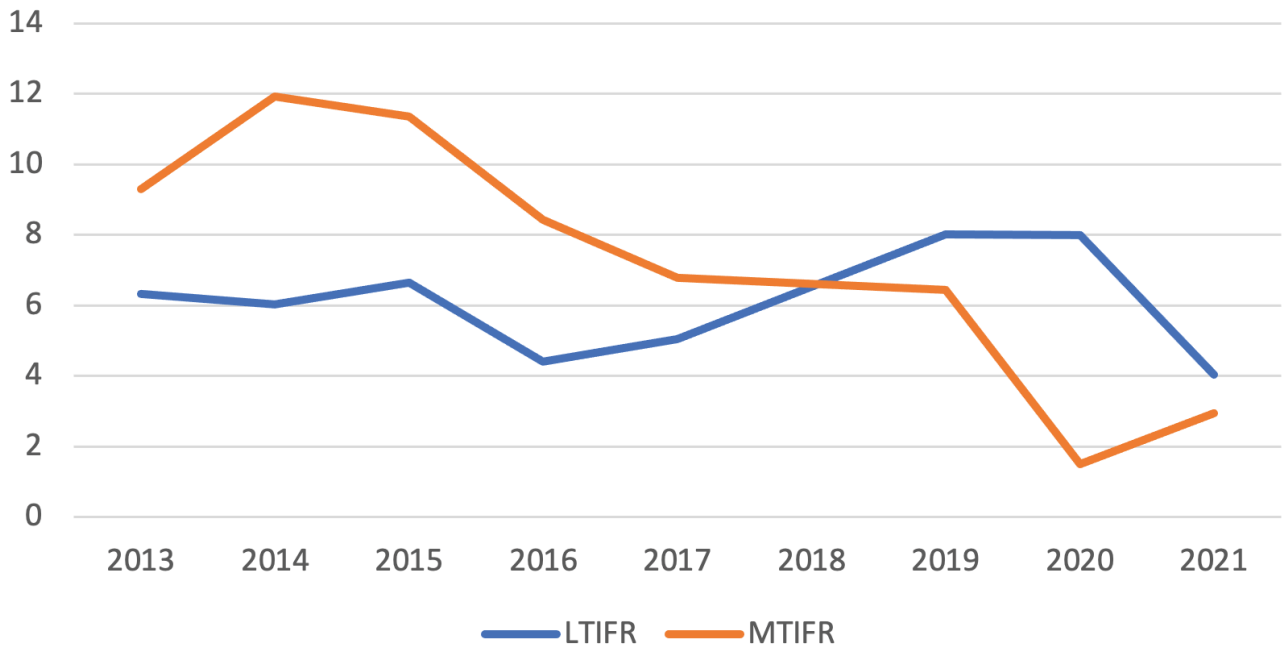
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## 2021 - APMF Health and Safety Survey

LTIFR is the lost time injury frequency rate per million hours worked  
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
- decreased 0.45 percent in 2021.

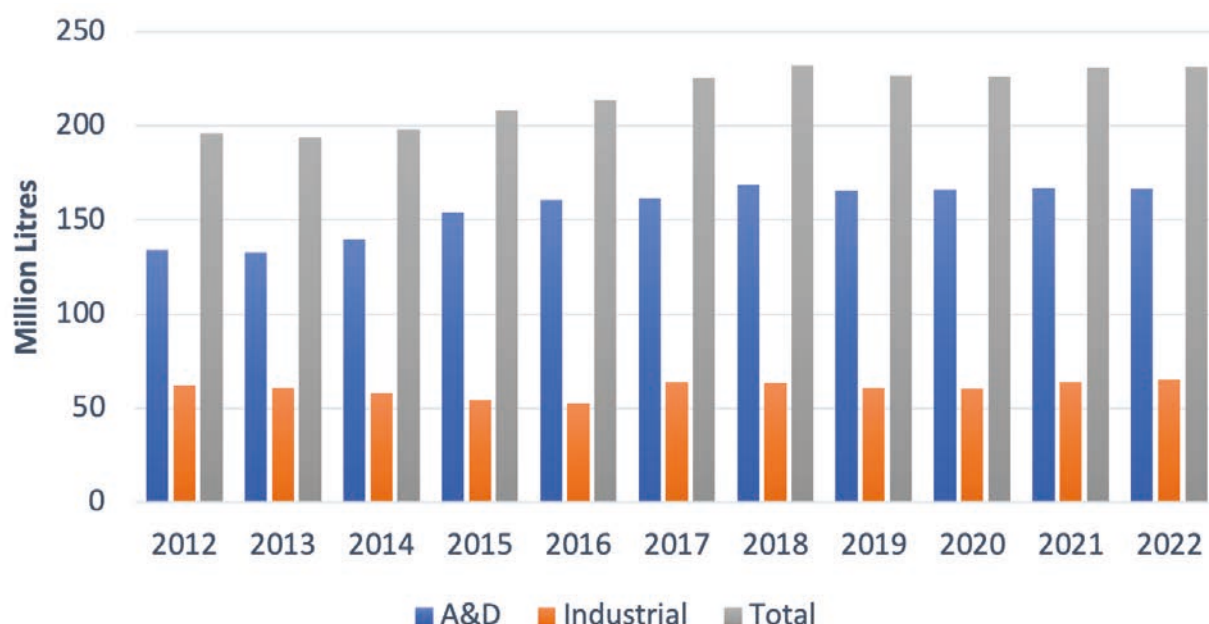
## Industry Aggregates - A&D plus Industrial

- decreased 2.4 percent in 2019
- decreased 0.1 percent in 2020
- increased 0.17 percent in 2021.

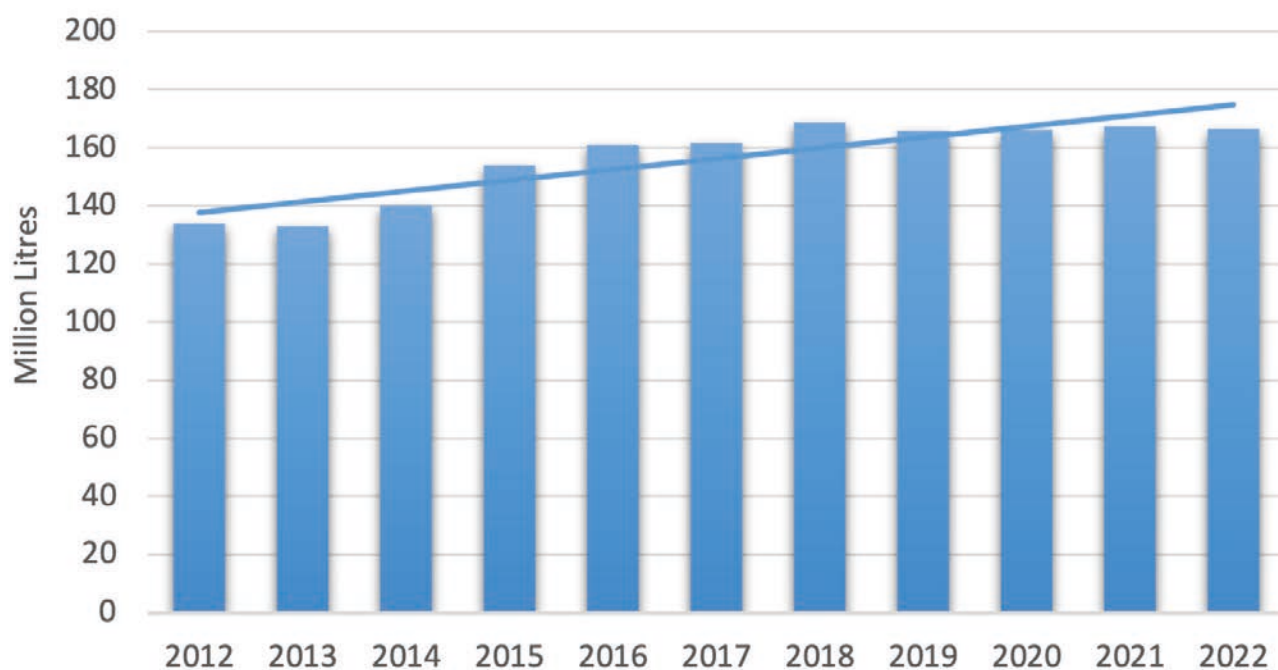
## Industrial Sales

- decreased 4.1 percent in 2019
- decreased 0.8 percent in 2020
- increased 1.8 percent in 2021.

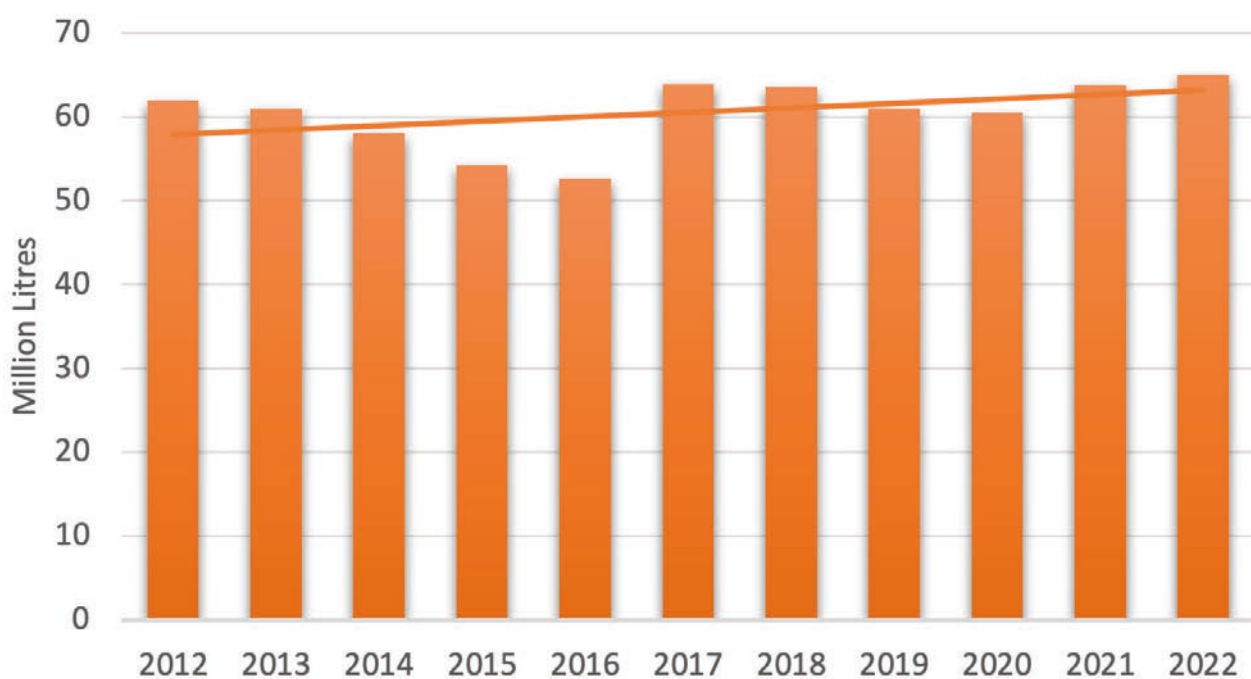
### Aggregate Sales - Architectural and Decorative (including wood care) and Industrial



### Architectural and Decorative (including wood care)



### Industrial (including automotive refinish)



# Strategic Plan 2020–2023

## Our mission

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.

## Our primary functions

<b>PROMOTE</b>	the industry and the contribution it makes to Australia.
<b>REPRESENT</b>	members through a collective voice on matters of importance to the industry, members and Australians.
<b>EDUCATE</b>	members, consumers, governments, regulators and the community in general on all matters relevant to the sector.
<b>INFLUENCE</b>	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

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

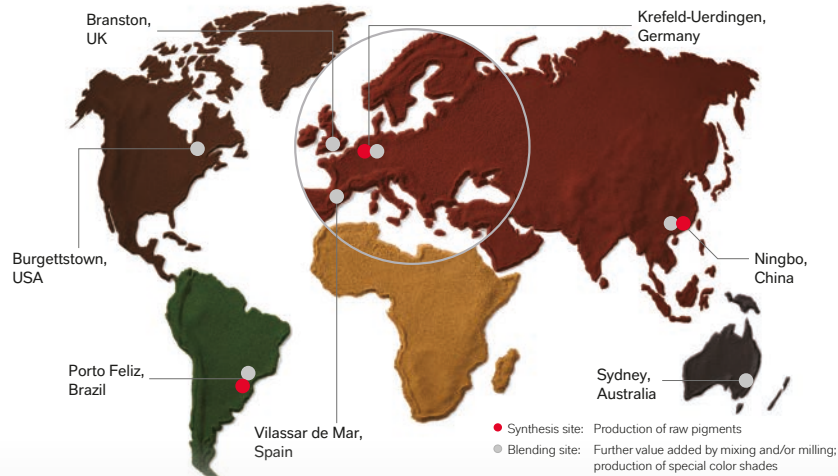


## 2020-2023 initiatives

ONGOING	
Policy and regulation	<p>Key areas of focus include:</p> <ul style="list-style-type: none"> <li>• Health, Safety, Environment, Logistics and Technical (HSELT) – continuing our work in the areas of health and safety, and the environment</li> <li>• waste management – exploring opportunities to address this key industry challenge</li> <li>• energy supply and cost – work with key stakeholders to mitigate the ever-increasing risk in this business input.</li> </ul>
Alliances	To attract and retain the best professional staff, and establish and nurture relationships with key universities 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 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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