



Australian Paint Manufacturers' Federation Inc.

The background of the entire page is a close-up, high-angle shot of numerous open paint cans. The cans are arranged in a grid-like pattern, and each can is filled with a different vibrant color of paint, including red, orange, yellow, green, blue, purple, and pink. The lighting is bright, creating a glossy sheen on the paint surfaces.

# ANNUAL REPORT 2025

## NOTICE OF ANNUAL GENERAL MEETING

## AGENDA

NOTICE IS HEREBY given that the 68th Annual General Meeting of the Australian Paint Manufacturers' Federation Inc. will be held on Monday, 17 November 2025, commencing at 4:00 pm at

Paintback Limited,  
Woodlands Drive, Braeside, Victoria,  
and via Microsoft Teams.

Joseph Kaltoum  
Public Officer

1. Apologies
2. Minutes of Annual General Meeting of 26 November 2024
3. Annual Report for 2024/25
4. Annual Accounts for 2024/25
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 this me secretary no later than 24 hours before the time of the meeting.





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## ABOUT THE APMF

Established in 1947, the Australian Paint Manufacturers' Federation Incorporated (APMF) has proudly represented the nation's paint and coatings industry for over 78 years. Today, it continues to champion the sector's economic, social, and environmental contributions to Australia.

With an annual output valued at approximately \$3 billion, Australia's paints and coatings industry is a vital economic driver. It directly employs around 6,500 people and supports 51,000 trade painters, while also enabling thousands of jobs in retail, logistics, design and architecture. Paints and coatings are also critical inputs into a wide range of value-adding activities, including construction, manufacturing, and infrastructure development. Through these sectors, the industry's impact multiplies across the economy, contributing significantly to Australia's GDP.

As a not-for-profit industry association, the APMF represents 19 member companies, collectively responsible for more than 90% of all paint manufactured in Australia. Governed by a Council of representatives from both small and large manufacturers, the APMF provides members with expert services across health, safety, environment, packaging, distribution, storage, logistics, and technical domains.

The APMF serves as the primary industry advocate to state and federal governments, as well as regulatory and statutory bodies. It plays a critical role in keeping members informed of legislative developments and regulatory changes, while actively contributing to reform processes to ensure the industry's voice is heard.

To support its mission, the APMF operates several committees and working groups—including the Health, Safety, Environment, Logistics, and Technical Committee—which help shape industry initiatives and responses to emerging challenges.

Internationally, the APMF is a member of the World Coatings Council (WCC) and a founding member of the Asia Paint Industry Council (APIC). The WCC, established in 1992, provides a global forum for addressing industry-wide issues and coordinating policy responses to international bodies. APIC facilitates collaboration and information exchange among Asian paint manufacturers and raw material suppliers. Through these affiliations, the APMF ensures Australia's paint industry is well represented on the global stage.

Domestically, the APMF holds one of four industry seats on the Strategic Consultative Committee under the Australian Industrial Chemicals Introduction Scheme (AICIS) and actively participates in numerous Australian Standards Committees.

In 2019, the APMF formed a strategic partnership with Chemistry Australia, which now manages its day-to-day operations. This collaboration enhances the APMF's policy influence and provides members with access to a broader suite of services and expertise.

## MEMBERS OF COUNCIL 30 JUNE 2025

Name	Position	Company
Rodney Walton	Chairman	Haymes Paints
Pat Jones	Member	DuluxGroup
Nick Galloway	Member	PPG
Jamie O'Brien	Member	Akzo Nobel
Joe Kaltoum	Member	Concept Paints
Matthew Crossingham	Member	Hempel (Wattyl) Australia
Elle McDermott	Member	DyMark

## APMF MEMBERS 30 JUNE 2025

### Full Members

Akzo Nobel Pty Ltd  
Bondall Marketing Pty Ltd  
Cameleon Coatings  
Colormaker Industries Pty Ltd  
Concept Paints  
Dulux Australia  
DyMark

### Associate Members

Haymes Paints  
Hempel (Wattyl) Australia) Pty Ltd  
Lacnam Paints Australia  
PPG Industries Australia  
Roberston's Paints  
Signet Pty Ltd  
Axalta Coatings Systems Australia Pty Ltd  
BASF Australia Ltd  
Jotun Australia Pty Ltd  
Paintback Ltd  
Resene Paints (Australia) Ltd  
Sherwin-Williams Automotive Australia (Valspar)

## CHAIRMAN'S REPORT

It has been another dynamic and successful year for the Australian Paint Manufacturers Federation (APMF). Our commitment to representing and supporting our members has led to several key achievements that continue to strengthen our industry and its future.

This year we have:

- Revamped our member market survey by transitioning to a new provider. This change reflects evolving market conditions and product trends, including the growing adoption of waterborne paints across all segments. The updated survey should deliver deeper insights and more actionable data for participating members.
- Worked to ensure a balanced and science-based approach to Workplace Exposure Limits for titanium dioxide, aligning with recommendations from the Commonwealth Department of Health.
- Celebrated the inaugural World Paint and Coatings Week, joining with global industry associations to spotlight the innovation, sustainability, and global impact of our sector. As part of the celebrations, we also promoted the diverse and rewarding career opportunities available in the industry, including roles in research and development, manufacturing, engineering, marketing, finance, and management.

Our strategic priorities remain focused on:

- Sustainability and the circular economy;
- Monitoring and influencing national and international regulation affecting the Australian surface coatings industry; and
- Advocacy to strategic stakeholders across government and industry.

In today's complex regulatory environment, it is vital that Australian paint manufacturers have a strong, informed voice. Legislation that lacks scientific grounding or industry consultation can undermine competitiveness and stifle innovation. The APMF continues to champion evidence-based policies that support growth and innovation.

Our Health, Safety, Environment, Logistics and Technical (HSELT) committee has played a crucial role in addressing key regulatory issues, including national packaging reforms and proposed changes to workplace exposure limits. Their work ensures our industry's perspectives are heard and respected.

To our Full and Associate members: thank you for your continued support and contributions to the Federation. Your engagement empowers the APMF to remain a strong advocate for our industry, especially as we navigate increasingly complex regulatory challenges. I would like to specifically thank all of the member representatives who worked on the market survey transition and helped to make it a success.

I would like to express our sincere thanks to Michael Paag for his contribution to the success of the APMF. Michael has stepped down after more than a decade on the APMF Council. Michael has been a passionate supporter and advocate of the Federation and industry over that period.

I would like to acknowledge Bernard Lee, our Executive Officer, for his outstanding leadership and dedication throughout the year. Bernard's contributions continue to enhance the APMF's impact and reputation.

Wishing you all our members and supply partners successful year ahead.

**Rod Walton**  
Chairman

## EXECUTIVE OFFICER'S REPORT

This report outlines the Federation's key activities over the 12 months ending 30 June 2025.

Over the past year, the APMF has delivered several important outcomes for members. A major improvement was the transition to a new provider for the member market survey and to enhance the quality and relevance of the data available to support business decisions and industry benchmarking.

On the regulatory front, the Federation has been actively involved in ensuring a balanced and scientifically sound approach to Workplace Exposure Limits (WELs) for titanium dioxide. Our engagement with regulators has focused on aligning proposed changes with the recommendations of the Commonwealth Department of Health, aiming to protect worker safety without imposing disproportionate costs on manufacturers.

We also continued our work on poison scheduling proposals. This remains a critical area of focus, given their potential to impact product availability and performance, and the cost of manufacturing in Australia.

In March, the APMF joined industry associations worldwide to celebrate the inaugural World Paint and Coatings Week. This global event highlighted the essential role our industry plays in sustainability, innovation, and everyday life, and reinforced the value of international collaboration.

The World Coatings Council conference, held in Frankfurt, brought together global leaders to address key regulatory challenges, including biocide use in water-based paints, microplastics, PFAS restrictions, and product stewardship.

The APMF's HSELT Committee has been actively engaged in these discussions. A detailed overview of these issues is included in the HSELT Committee's report.

Looking ahead, the Federation will continue to focus on packaging reforms, product stewardship, poison scheduling, and workplace exposure limits. Packaging reforms are expected to introduce mandatory recycling targets and new stewardship obligations. It is essential that these reforms are designed to avoid placing additional burdens on Australian manufacturers that are not equally applied to imported products. An uneven regulatory landscape risks undermining both competitiveness and the effectiveness of environmental initiatives.

Paintback®, the industry-led product stewardship scheme established by the APMF and its members in 2016, continues to grow and innovate. In April 2025, members gathered to celebrate the opening of PaCEHQ in Melbourne. This facility employs state-of-the-art technology that can process over 19,000 kgs of raw paint per day as well as 3,000 kgs of plastic and 5,000 kgs of metal paint packaging. PaCEHQ is dedicated to end-to-end sorting and separation of paint material from its packaging, turning them into clean re-useable materials all under one roof, along with significant research and development capability. Paintback® has a target of repurposing more than 90% of the paint and packaging that it collects.

Thank you for your continued support of the Federation. Your engagement ensures we remain a strong, united voice for Australia's paint and coatings industry.

**Bernard Lee**  
Executive Officer



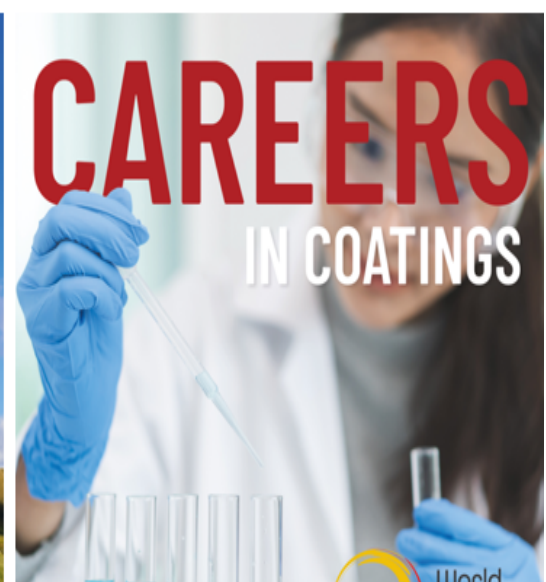
## WORLD PAINT AND COATINGS WEEK

From March 24–28, 2025, the global paints and coatings industry united to celebrate the inaugural World Paints and Coatings Week. Led by the World Coatings Council (WCC) and supported by national associations including the APMF, the initiative aimed to raise awareness of the essential role coatings play in society, sustainability, and innovation.

The week featured five daily themes: essential coatings, sustainable coatings, innovative coatings, valuable coatings, and careers in coatings. Each theme highlighted the industry's contributions through coordinated campaigns and shared case studies.

The APMF actively participated by launching a social media campaign showcasing the critical contribution the industry makes to Australian homes, infrastructure, innovation, jobs and the environment.

World Coatings Week 2025 successfully amplified the industry's voice, engaged policymakers and the public, and inspired future talent to consider careers in coatings.





## HEALTH, SAFETY, ENVIRONMENT, LOGISTIC AND TECHNICAL COMMITTEE REPORT

The Health, Safety, Environment, Logistics and Technical Committee remained highly active throughout the 2024/25 financial year. Their work continued to focus on reducing workplace injuries, minimising environmental impact, and ensuring the industry's voice is heard in the development of legislation, standards, codes of practice, and regulations affecting the paints and coatings sector.

The Committee serves as central forums for addressing technical and regulatory issues that impact the formulation, manufacture, and use of both industrial and consumer paint products. Over the past year, the Committee has considered and responded to a wide range of matters, including:

- **Workplace Exposure Limits (WELs):** Provided detailed input into Safework Australia's Regulatory Impact Assessment on the proposed reduction of the workplace exposure limit for titanium dioxide from 10 mg/m<sup>3</sup> to 1 mg/m<sup>3</sup>. The Committee raised concerns about the scientific basis for the change, the cost implications for manufacturers, and the practical challenges of monitoring and compliance, particularly for smaller businesses.
- **Packaging Reform:** With the Commonwealth assuming responsibility for national packaging regulation, the Committee provided input to DCCEE's consultations. The APMF advocated for recognition of Paintback®, established in 2016, as a successful product stewardship initiative that should be supported, not disrupted, by future reforms.

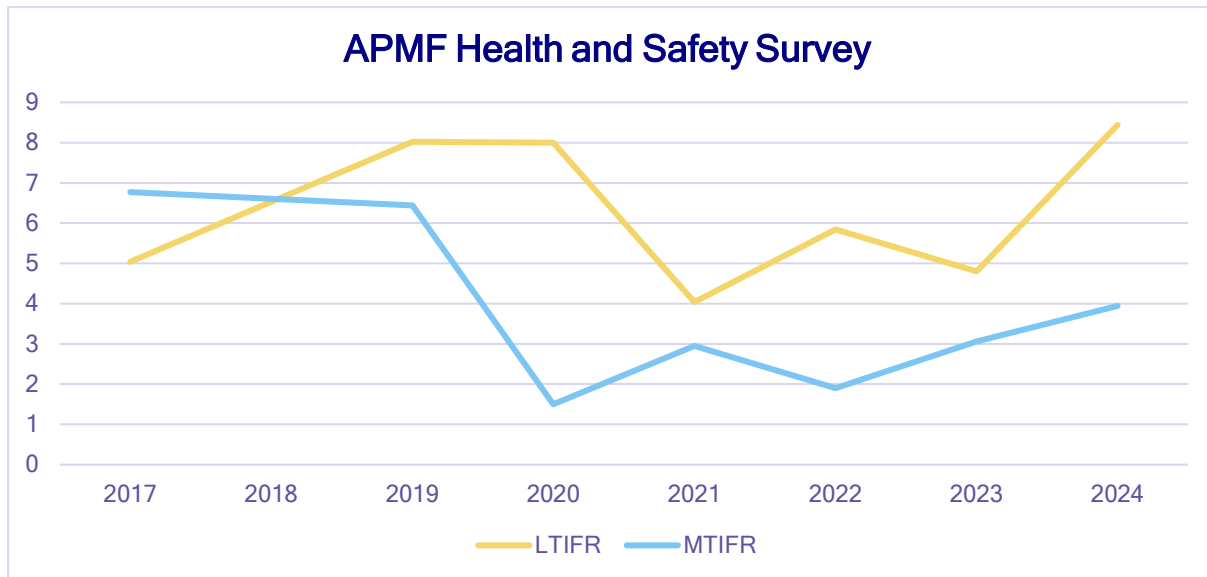
- **Poison Scheduling Proposals:**

- Opposed changes that would significantly impact industrial users of caustic soda, including paint manufacturers.
- Responded to proposals requiring relabelling of products containing methyl ethyl ketoxime (MEKO). The APMF proposed a delayed implementation timeline to allow manufacturers to reformulate products, avoiding costly relabelling.

- **PFAS in Paints and Coatings:** Responded to claims that paints and coatings are a significant source of PFAS contamination in Australia. Following a detailed review, the Committee concluded that PFAS use in Australian-made paints is limited to a small number of specialty products.

Throughout the year, the Committee has continued to advocate for practical, evidence-based regulation that supports both worker safety and industry sustainability. Their work ensures that the paints and coatings sector remain informed, engaged, and well-represented in key policy discussions.

## APMF MEMBER HEALTH AND SAFETY PERFORMANCE



**LTIFR** is the lost time injury frequency rate per million hours worked

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





## SNAPSHOT OF PAINT COATINGS INDUSTRY IN AUSTRALIA

### Industry Aggregates – A&D plus Industrial

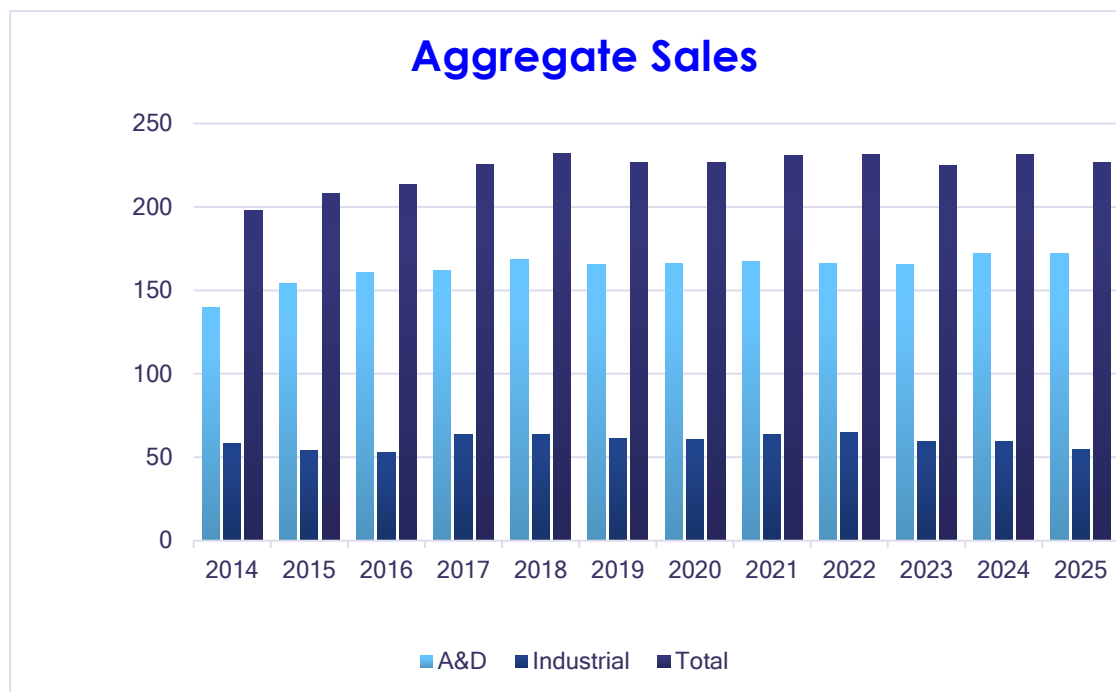
- Decreased 2.76 per cent in 2023
- Increased 2.7 per cent in 2024
- Decreased 2 per cent in 2025

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

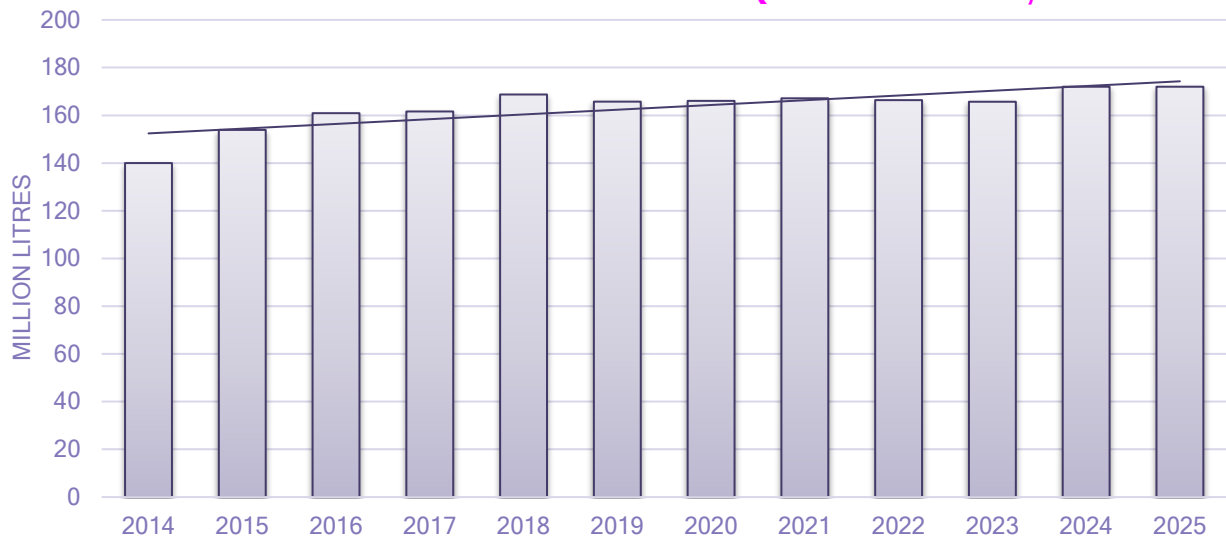
- Decreased 0.40 per cent in 2023
- Increased by 3.7 per cent in 2024
- Stayed the same

### Industrial Sales (including automotive)

- Decreased 8.8 per cent in 2023
- Increased 0.1 per cent in 2024
- Decreased 7.8 per cent in 2025



### Architectural & Decorative (inc woodcare)



### Industrial (inc Automotive refinish)

