

ECCA and its members are committed to the principle of sustainability and consider the care and protection of the environment to be essential for the wellbeing of the industry, its customers and the wider community.

ECCA members will:

- recognise that they have a responsibility to their employees, shareholders, customers and their local community to control and minimise the impact of their business activity on the environment
- meet the requirements of all relevant legislation in all countries and regions in which they operate
- improve the environmental performance of their processes by reducing energy use, emissions, minimising waste and controlling noise
- develop an open dialogue with all stakeholders on environmental issues

ECCA will:

- cooperate with regulatory authorities at European level in the development of sustainable best practice, legislation and related topics
- communicate with its members on a regular basis with regard to proposed and new legislation and documentation from government and regulatory authorities
- help its members understand the principles of sustainability and the environmental effects of their products and processes, by circulating appropriate information and promoting best practices
- encourage its members to adopt recognized best practice in management of environmental and health & safety issues
- monitor progress of the coil coating industry against a series of sustainability-related Key Performance Indicators and communicate this on a regular basis

ECCA (the European Coil Coating Association) is the voice of the coil coating industry since 1967 and dedicated to promoting the use of prepainted metal as the environmentally sound, the cost effective and the high quality method of finishing.

European Coil Coating Association

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Sustainability Report

2014

INTRODUCTION

The European Coil Coating Association represents the European coil coaters and their main suppliers, such as paint, chemical, and line equipment producers. ECCA has been collecting and analysing environmental performance data since 2008 from all its coil coater members. Since 2012 the paint suppliers have been invited to take part in this annual exercise.

This report presents the summary of the results from the environmental indicators survey for data collected in 2013. Data was received from 23 coil coaters and 61 coil coating lines, representing over 90% of the whole industry (based on total throughput in m²) in Europe. In addition, 12 paint production lines participated in this survey representing over 50% of the total production in 2013.

With data being collected from many different sites in different European countries and operated by different companies, there is a risk that reporting practices could differ. Very clear instructions are provided within the survey to avoid such inconsistencies.

It must be stressed that the data presented here have been provided on a voluntary basis by the ECCA members involved and are, to the best of our abilities, representative. However, this report should not be used as a basis for comparison against other materials or processes without very close attention being paid to the basis of the data. For further information about the collection of these data and how to compare against other published information, please contact ECCA head office.

Thank you!

ECCA Head Office Team

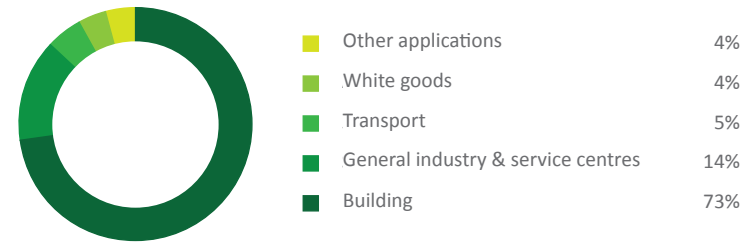
The following ECCA member companies participated in the collection of data:

3A Composites	Metal Trade Comax
Acciai Speciali Terni	Metalcolor
Alcoa Architectural Products	Novelis
Apliband - Grupo Andaluca	PPG Coatings
ArcelorMittal	Replasa
Axalta Coating Systems	Salchi Metalcoat
Bancolor	Salzgitter Flachstahl
BASF Coatings	SSAB Europe
Beckers	Tata Steel
Elval Colour	Thyssenkrupp Steel Europe
Euramax	US Steel Kosice
Hühoco	voestalpine
Hydro Aluminium	YarLi



European Coil Coating Industry

The industrial data are based on the annual ECCA environmental indicators data collection. Where necessary, the figures have been scaled up to estimate the total size of the industry. The total figures for steel, aluminium and paint shipments for the year 2013 reported in the ECCA statistics have been used in these cases.



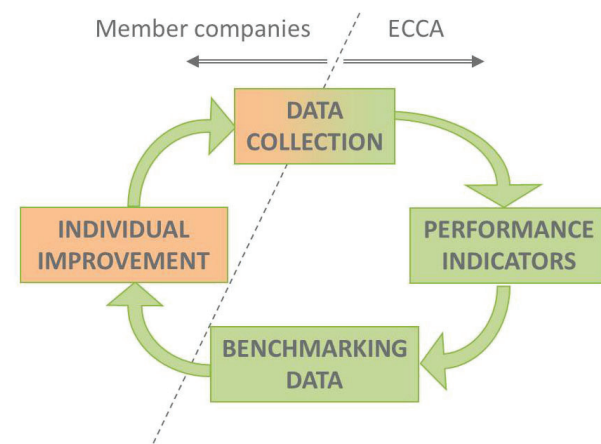
Key facts

Estimated total turnover for the industry (coil coating and paint)	€ 5.5 billion
Total shipments of coated metal	1 240 million m ²
Total shipments of coated steel	4.75 million tonnes
Total shipments of coated aluminium	0.33 million tonnes
Total shipments of paint for coil coating	196 000 tonnes

The European coil coating industry is estimated to directly employ 5300 people in Europe. The amount of indirectly employed people, e.g. through suppliers to the industry, is at least as high as in the coil coating businesses themselves.

Continuous commitment to sustainability

ECCA, as the representative body of the European coil coating industry, is fully committed to the three pillars of sustainable development, balancing a financially stable industry with social responsibility to employees and stakeholders and an attitude of guardianship towards the environment.



Managing a sustainable industry

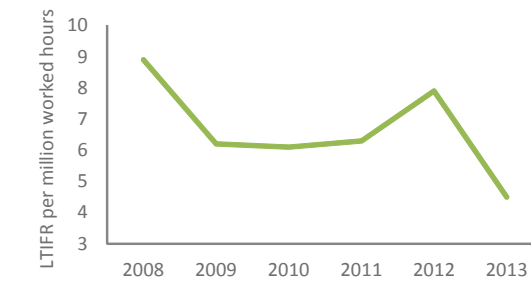
The coil coating industry includes a wide range of companies from multinationals to SMEs. However, across all of these companies, the industry takes its responsibility seriously.

- 100% of the reported lines operate under a certified ISO 9001 management system
- 94% operate under an environmental management system
- 93% operate under a safety management system

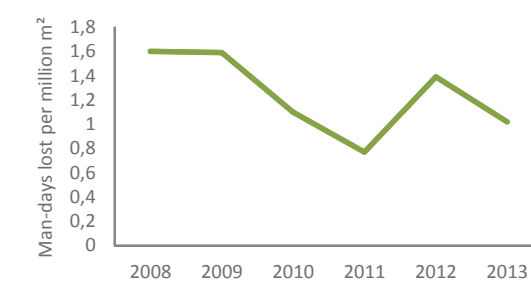
Health and safety

Since 2010, ECCA have increased the focus on safety by encouraging all those involved in the annual survey to freely share information on safety improvement initiatives and safety training within their companies. In addition, ECCA have instigated a safety network from among member companies, facilitating the exchange of information on safety-related topics.

Lost Time Incident Frequency Rate (LTIFR) 2008-2013

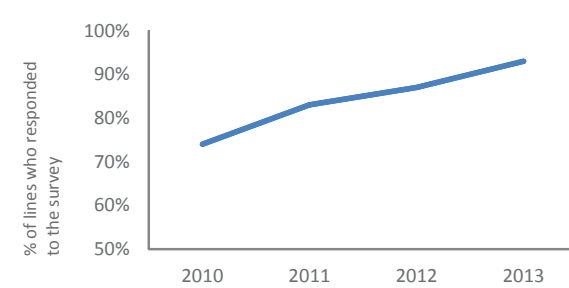


Number of days lost to injury 2008-2013

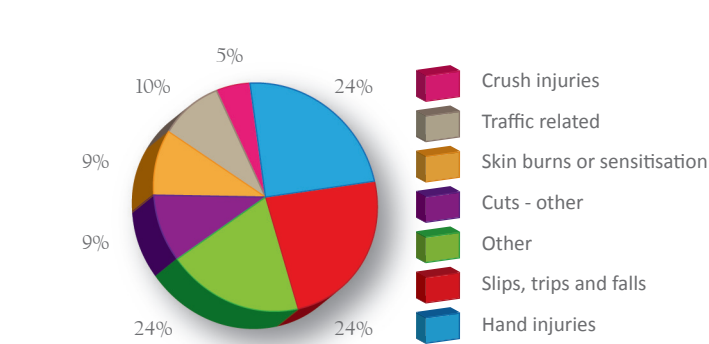


Zero fatalities reported in 2013 !

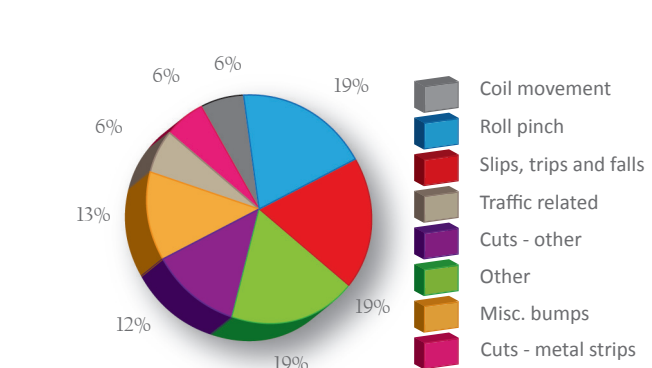
Adoption of a safety management system 2010-2013



Incident types 2013 - Paint suppliers



Incident types 2013 - Coil coaters



The number of coil coating lines adopting a safety management system has increased steadily over the past years. The most commonly applied safety management system is OHSAS 18001, but a number of other schemes are applied instead or in addition to it. ECCA strongly encourages this development.

Energy

In coil coating, the major uses of energy are for curing paints at high temperature, as well as providing motive power and other energy uses typical of industrial facilities.

The increasing energy prices and the environmental damage caused by both extracting and burning fossil fuels give pressure to reducing the energy use in all industries. The European coil coating industry takes its responsibility seriously and is continuously striving to reduce its impact on the environment.

In 2012 the European coil coating industry launched a joint project with the aim of finding routes to reduce the energy consumption in the coil coating process. The final report gives a ranking of 10 most relevant and efficient ways to reduce the total energy consumption. In many cases additional environmental benefits, such as lower VOC emissions, can be achieved.

The focus on energy efficiency has been successful. For example, installation of more efficient VOC destruction systems (Regenerative Thermal Oxidisers), upgrading the curing oven configuration and optimising the overall process management on the coil coating lines have helped decrease the total energy consumption by 17% since 2008.

Water

Alongside concerns about future energy security, the question of availability of clean water is a very significant global concern. In this context, ECCA feels that it is imperative that our industry critically assesses and minimises water use.

Aside from standard uses of water, the main uses in coil coating are:

- For cleaning and rinsing the strip surface prior to coating;
- For application of a chemical conversion coating to allow efficient paint coating;
- For quenching the hot metal strip after exit from the ovens.

In the case of pre-treating the metal strip prior to coating, two alternative technologies are available. The traditional method of pre-treatment of using a spray bath to deposit the conversion coating on the surface of the metal strip has been largely superseded by the so-called "no-rinse" technique, in which the chemical agent is applied by roller-coating, requiring significantly less water usage.

The total water usage has decreased significantly since 2008. The positive development can be linked with conversion to no-rinse systems and investments to more efficient water management systems in the industry.

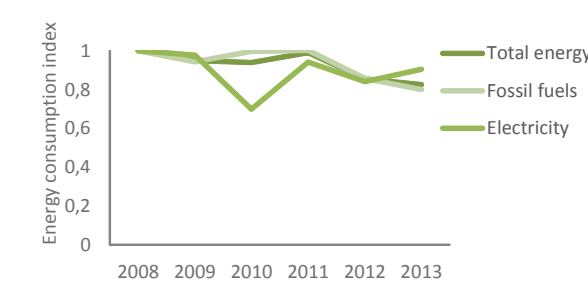
VOCs

Despite advances in technology, the vast majority of coil coating paints are solvent-borne.

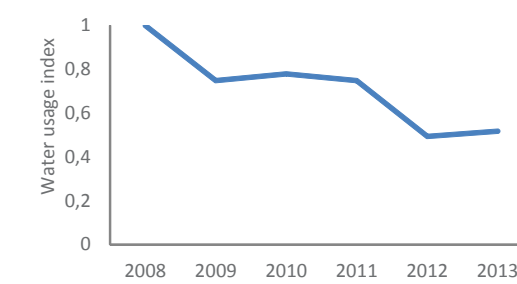
There are several potential environmental impacts from solvents used in coil coating and solutions are continuously being sought to reduce solvent use in the coil coating process.

The average solvent use in coil coating production has remained stable at approximately 45 g/m² produced.

Energy consumption index on coil coating lines, reference year 2008



Water usage index on coil coating lines, reference year 2008



Recyclability

- 100% of the scrap metal produced is recycled and re-used in production of pre-coated metal
- > 95% recycling rate of metal products used in building applications
- Using recycled metal gives energy savings between 60-95% compared to primary production

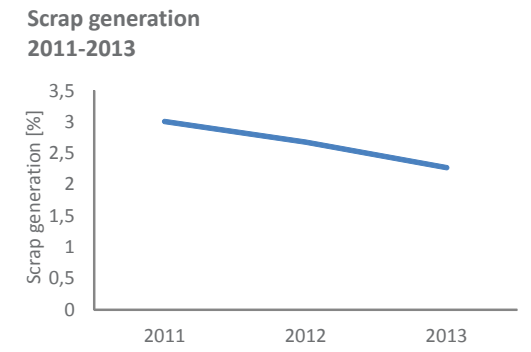
Metal products can be recycled indefinitely and used for the same applications without loss of quality.

Scrap

An element of scrap metal is inevitable due to the continuous operating nature of coil coating lines. For example, in changing coating colour, an amount of scrap is inevitable between colours and since paint curing usually depends on heating the metal strip, changes in strip dimensions can also create imperfect material for short periods. Modern coil coating lines are well managed to minimise scrap from product change-overs and factory processes are optimised to minimise damage.

Since coil coated metal is fully recyclable, 100% of the scrap metal generated is re-used in the production on all coil coating lines in Europe.

Higher production volume in 2013 has led to less scrap, which is illustrated in the graph presenting the scrap generation rate since 2011.



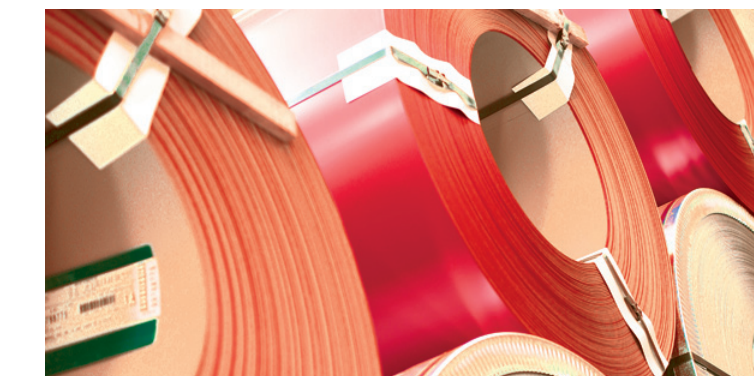
Waste

All industrial processes generate waste, whether from incomplete conversion or inputs, packaging or ancillary activities. It is important for the future that waste is first minimised and that then all remaining waste is disposed of by the most sensitive means, preferably re-used or recycled.

The overall objective of the industry is to achieve 0% landfill disposal level, realistically achievable within a few years.

Of the total amount waste, 53% was reported hazardous and 47% non-hazardous.

General waste disposal routes used by coil coaters in 2013 - given as % of the total dry waste generated by the industry



- Recycling 60%
- Incinerated WITH heat recovery 17%
- Incinerated WITHOUT heat recovery 5%
- Landfilled 7%
- Other (e.g. chemical treatment) 11%