



## European Brushware Federation

### Report

*Subject* : **Meeting FEIBP Working Group Paint Brushes**

*Date* : **1-10-2020**

*Attending* : Piet van Erp (chairman), Daniel Zahn, GianAntonio Pogliani, Pierre Simler, Thorsten Stollberg, Youcef Baslimane, Reinhold Hörz, Eberhard Hörz, Thomas Holland-Letz, Alessandro Civiero, Charles Bentley, Fons Ceelaert (general manager)

*From* : Fons Ceelaert

*Date* : 8 October 2020

*Reference* : feibp.vsl.XXXXXX-1654398770-189

#### 1. Opening

Piet van Erp has been so kind to accept chairmanship for this meeting.

Piet welcomes everyone attending and opens the meeting.

#### 2. Report of the meeting of the Working Group Paint Brushes, held on 26 September 2019, Lucerne (Zwitzerland)

This report was approved without any remarks.

#### 3. Impact COVID-19 on the EU paint brush industry section

Thorsten Stollberg / Wistoba – Germany

- Professional market back to normal and slightly better as 2019
- For Wistoba 2020 will be a normal and good year

Reinhold Hörz / raw materials

- Double turnover titanium dioxide
- Indonesia market down 50%
- These two examples show that parts of the business perform better and others worse during the crisis

Pierre Simler / France

- Long lockdown with negative impact on society and economy
- Paint brushes and rollers higher turnover
- With people forced to stay home re-decoration has become popular

- Stocks were low for strategic products in the food and DIY market, now stabilised situation
- It will prove to be an exceptional situation and the high demand for paint brushes and rollers leads to pressure on the availability of end products, avoid that the supply of raw materials and components is in danger

#### GianAntonio Pogliani / raw materials

- Supply to the paint brush manufacturers is quite well and indeed has to do with the demand in DIY market
- Overall the business is not good, - 30%.
- Industrial brushes are heavily affected by COVID-19

#### Daniel Zahn / Germany

- Massive downturn during period March – May 2020, then recovery started with some huge increase in demand for certain product categories, for example artist brushes.
- On the other hand the demand for cosmetic brushes is low

#### Charles Bentley / United Kingdom

- Internet sales paint brushes and DIY shops are performing well in the paint brush range
- 2020 will be not a bad year, the 200 employees are very busy

#### Thomas Holland – Letz /Germany

- Confirms the positive trend for paint brushes, overall +30% in DIY but also more demand from professional craftsman who create new business

#### Piet van Erp / The Netherlands

- “intelligent” lockdown in March / April 2020
- Booming business as people started redecorating their houses
- Up to + 75%, now + 30% increase in turnover paint brushes
- This leads to other problems, such as supply raw materials and components

## **4. Selected items**

### ***a. Changes in the market***

Reshoring as a result of COVID-19?

Pierre said that the appeal by the French Government is to produce locally and avoid unnecessary transport, in the context of COVID-19/

Contrary to that Leroy Merlin (44% market share) decided to terminate contracts with Nespoli and move to China. This caused media attention and a speech by the Deputy for La Capelle at the French Assembly to question this decision.

Leroy Merlin is not amused and is forced to explain their policy, with lawyer support.

Pierre will send some newspaper articles to *Fons*.

Whether or not COVID-19 will lead to structural re-allocation of production to the EU is difficult to judge, but Thomas is not that positive.

Pierre adds to the *Leroy Merlin* item that another big customer *Klingfisher* went to China, but due supply disruptions this company returned to Europe and then it was difficult to supply!

#### **b. Sustainability and durability paint brushes and rollers**

GianAntonio notes increasing demand for biodegradable filaments (for toothbrushes, paint brushes and cosmetics products).

Research is carried out in this field, no real results yet but some progress is made.

Additives can anticipate the biodegradability of filaments

The quality of the filaments needs to fit the application.

Reinhold adds that there is increasing demand for bristle for high quality cosmetics products, it is a niche.

The transition from bristle to synthetics in the paint brush sub-sector goes on.

He believes that biodegradability is more an argument / theme in cosmetics than for paint brushes.

Piet points out that bristle is a by-product and is in that respect to be regarded as more sustainable.

Pierre raises the argument that is of the essence to distinguish between disposable brushes and re-usable brushes, as in the top quality professional range.

But people do not like to clean brushes and washing equipment / cleaning systems seems to be only interesting for the professionals.

It makes Thorsten sad to see how easy paint brushes are thrown away

Eberhard notes that in the end price is what makes the market decide and only politics can make things moving, for example by imposing taxes on synthetics.

Piet brings on the question if we as manufacturers are motivated to find ways to make our products more biodegradable.

Pierre wishes not to embark on experiments but slow adaption is key.

As it was with the gradual application of synthetics in paint brush products, the objective to make biodegradable products will cause many production problems.

Piet advocates that the manufacturers must play their own role in this process and incentives in easy to clean systems and the re-usability of paint brushes can be picked up, it will add and enhance our credibility. Choice of glue and the use of FSC / PEFC certified timber in the handles are other aspects to take on board.

Pierre notes a high demand for FSC wood in the DIY sector but not at all in the professional market.

This will be a recurrent item on the agenda of the WG Paint Brushes

#### **c. Education for paint brush manufacturing / qualified workers**

To continue on last years' reflections.

Pierre informs that in Saint Brieux a special education programme exists for young scholars. But the government questions the future financing due to the minor importance of the brushware industry. Everyone will have to learn the skills on the job, as it now happens in most companies.

Thomas notes low numbers of students at Bechhofen but the industry is proud to keep it alive. A trend among the bigger companies is to switch the internal education to machinery operating programmes with the help of the suppliers.

Thorstens supports the Bechhofen education programme and would like to promote it more, See that more young people get interested in working in our companies. It is good system combining school and professional education.

#### **5. Trends raw materials applied in the paint brush manufacturing**

Eberhard notes no shortages in supply with lead times 2-3 weeks

Attention for changing rules in the framework of REACH, regarding epoxy (glue composition)

Alessandro expands the scope to the composition of ferrills and handles

GianAntonio foresees stable prices next year.

#### **6. Development of a quarterly market research enquiry paint brushes**

This proposal was agreed unanimously.

#### **7. PR for the paintbrush**

An additional argument by Thorsten against a “Made in Europe” logo is the fact that it could give the impression in some markets that these brushes are cheap.

Next time more attention for the item PR

#### **8. Any other business**

Kolinsky hair / follow up FEIBP to letter German brushware association

Based upon the information provided by *Daniel*, *Thomas* and *Alessandro* the FEIBP writes a supportive letter to the European Commission to avoid import disruptions for the EU

#### **9. Date next meeting**

Everyone enjoyed this interesting meeting, the Working Group is very much alive and it was decided to organise 2 meetings each year. One in conjunction with the FEIBP congress and one separate meeting in between congresses.

**Next ONLINE meeting**

**Tuesday 19 January 2020**

**10.00 – 12.00 hours CET**

#### **10. Closure**

Everyone really appreciated the chairmanship by Piet, who did close this meeting.