

## **BUSINESS PLAN**

### **CEN/TC 298**

#### **PIGMENTS AND EXTENDERS**

#### **EXECUTIVE SUMMARY**

Standardization in the field of pigments, dyestuffs and extenders

#### **Business environment**

- Europe represents about 35 % of pigments, dyestuffs and extenders of world market;
- Number of application sectors (e.g. paints, plastics, printing inks, papers, concrete and mortar);
- Parties involved:
  - Manufacturers of pigments and extenders;
  - Manufacturers of paints, plastics, masterbatches, printing inks, papers, concrete and mortar;
  - Consumers;
  - Testing institutes.

#### **Benefits**

Definition of necessary standards to be used to meet the increasing needs of the market.

- Confidence of consumers with respect to quality and environmental aspects;
- Changing processing and quality require continuous improvement of the technical equipment in the pigments and extenders industry and of their products in accordance with the changing environmental and economic developments.

#### **Priorities**

To make European Standards available to:

- Harmonized classification and test methods for pigments and extenders;
- Harmonized terminology;
- Implementation of International Standards as far as possible;

Specifications for particular groups of pigments and extenders for which a specific European need exists.

## **1 BUSINESS ENVIRONMENT OF THE CEN/TC**

### **1.1 Description of the Business Environment**

The following political, economic, technical, regulatory, legal, societal and/or international dynamics describe the business environment of the industry sector, products, materials, disciplines or practices related to the scope of this CEN/TC, and they may significantly influence how the relevant standards development processes are conducted and the content of the resulting standards:

The standardization work is intended for use in the pigment/dyestuff and extender producing industries as well as in the industries using pigments, dyestuffs and extenders in their products, mainly paints, plastics, master batches, printing inks, concrete and mortar, paper, fibres. Other interested parties are users of products containing pigments, dyestuffs and extenders. These parties may be all kinds of end-users of goods/articles coloured with pigments and dyestuffs or reinforced/modified with functional pigments and/or extenders.

Generally, the majority of **pigments/dyestuffs producers** are globally operating companies.

**Producers of extenders** are some multi-national companies and a number of smaller, sometimes more nationally oriented companies. Producers of particular extenders are also located in various European countries.

**Users of pigments, dyestuffs and extenders** are globally operating companies and a wide variety of small or medium-sized enterprises, which is easily understandable in view of the many fields of application of such materials. Information on the world market of pigments, dyestuffs and extenders is given in table 1.

**Table 1 - World market of pigments, dyestuffs and extenders**

<b>Product group</b>	<b>Tons/year</b>	<b>Estimated value 1000 EUR</b>
Pigments		
- titanium dioxide	4 500 000	7 300 000
- inorganic coloured pigments	300 000	400 000 *)
- carbon black pigments	670 000	500 000
- organic pigments	300 000	3 600 000 *)
Dyestuffs		500 000 *)
Extenders **)	15 500 000	
- Blanc fixe		
*) Europe: 35 % (estimated)		
**) Europe: about 2 000 000 tons/year		

### **1.2 Quantitative Indicators of the Business Environment**

The following list of quantitative indicators describes the business environment in order to provide adequate information to support actions of the CEN/TC:

The percentage of total production of these materials used in the various fields of application is shown in table 2.

**Table 2 - Approximate percentage of total production of pigments, dyestuffs and extenders used in the various field of application**

Product group	Approximate percentage of total production used in					
	Paints	Plastics	Printing inks	Paper	Concrete, Mortar	Others
Pigments						
- titanium dioxide	60	20		10	5	5
- inorganic coloured pigments	40	40			15	5
- carbon black pigments						
- organic pigments	25	20	40			15
Dyestuffs	10	15	10			65
Extenders	15	20		55		10

## 2 BENEFITS EXPECTED FROM THE WORK OF THE CEN/TC

### Market Environment

Political, economical, social, technical, legal and international factors that either directly require some or all of the standardization activities proposed by the CEN/TC, or significantly influence the way these activities are carried out are the following:

#### Political factors

With more upcoming environmental issues standardization, e.g. of suitable methods of analysis for the determination of heavy metals, will become more essential to ensure the quality of the produced goods/articles for the end-user.

#### Economical factors

The benefit of standardization is estimated to about 1 % of the turnover. This is far away from the (relatively) low cost of standardization work.

Some of the European producers of colorants and extenders are driving the worldwide market in their respective field of activity.

Cost savings are, in particular, to be expected by the use of standardized test methods. Standardized test methods are necessary as the basis for product specifications, safety data sheets, product certificates (e. g. harmonized classification, CE-marking) and quality management systems, and render a direct exchange of test results possible.

#### Technical factors

Changes in requirements for end-use applications of pigments, dyestuffs and extenders in the various fields influence standardization work.

Standardization work on test methods is influenced by more sophisticated analytical techniques.

#### Legal factors

Potential upcoming legislation and regulations concerning the use of pigments, dyestuffs and extenders need standardization to allow objective assessment.

#### International Trade and Standardization Projects

The business is global, therefore strong collaboration with ISO is essential.

### **3 PARTICIPATION IN THE CEN/TC**

All the CEN national members are entitled to nominate delegates to CEN Technical Committees and experts to Working Groups, ensuring a balance of all interested parties. Participation as observers of recognized European or international organizations is also possible under certain conditions. To participate in the activities of this CEN/TC, please contact the national standards organization in your country.

## **4 OBJECTIVES OF THE CEN/TC AND STRATEGIES FOR THEIR ACHIEVEMENT**

### **4.1 Defined objectives of the CEN/TC 298**

The objective of CEN/TC 298 is to establish European Standards in the field of pigments, dyestuffs and extenders which reflect the needs of the interested parties and the actual practice in industry.

This standardization work includes:

1. Preparation of European Standards dealing with classification, test methods and specifications for pigments, dyestuffs and extenders in general or for relevant groups for which a specific European need exists;
2. Implementation of International Standards as European Standards relating to
  - a) test methods for pigments, dyestuffs and extenders;
  - b) specifications for relevant pigments, dyestuffs and extenders.

The objectives include the intention to follow technological changes by appropriate standardization work.

### **4.2 Identified strategies to achieve the CEN/TCs defined objectives.**

The part of the work of CEN/TC 298, which leads to European Standards in their own (see 1 above) is carried out in Working Groups, if necessary.

Implementation of International Standards is considered by the TC wherever possible. CEN/TC 298 is in agreement to implement, in principle, each new ISO/TC 256 Standard. The Vienna Agreement will be applied in order to allow for parallel voting enabling the CEN members to put forward (all) European wishes at an early stage and not after publication of new ISO Standards.

The TC meets regularly. All meetings are performed in English only. TC resolutions are circulated in English only. Liaisons with other CEN/TC's and ISO/TC 256 have been established.

### **4.3 Environmental Aspects**

CEN/TC 298 is aware of the fact that all standardisation activities may have an impact on the environment. This relates to both, the choice of meeting arrangements as well as the specific requirements being set in each standard. CEN/TC 298 will organise its work using webconferences as much as possible. When a face to face meeting is needed CEN/TC 298 will coordinate with ISO/TC 256 in order to minimize the impact on the environment due to travel

arrangements. CEN/TC 298 takes into account CEN Guide 4 and tries to identify all relevant environmental aspects for each standard when drafting or revising it.

## **5 FACTORS AFFECTING COMPLETION AND IMPLEMENTATION OF THE CEN/TC WORK PROGRAMME**

The completion of the work programme is influenced by financing of the TC and WG Secretariats. Funding by interested parties may become insufficient due to the difficulty to immediately express the advantages of standardization as a definite amount of savings/money.

Users of pigments, dyestuffs and extenders need standards that are satisfactory to them. If this will not be achieved, there is a danger that company standards will be established and implemented.

Generally, "high-quality" standards are required that meet the interests of all parties concerned. This, in turn, requires sufficient financing of the Secretariats.