

Summary of 2009 Annual Report for Architectural Coatings

Many local air pollution control districts in California amended their existing architectural coatings rules or adopted new rules based on ARB's 2000 Suggested Control Measure. These rules required an annual report from manufacturers of certain categories of coatings, and an annual report of coatings that included perchloroethylene or methylene chloride. Below are summaries of the results from the 2000 ARB survey, the 2003 annual report, the 2004 ARB survey, and the 2005, 2006, 2007, 2008, and 2009 annual reports.

Reporting Requirement Categories

Bituminous Roof Coatings

Year	Sales (Gals)	Difference	Primary Reasons for Major Differences
2000	3,245,397		
2003	1,224,001	Down 62%	<ul style="list-style-type: none"> • Adhesives correctly reclassified as not architectural coatings • Reduced CA sales in 2003
2004	1,464,326	Up 20%	
2005	1,756,861	Up 20%	
2006	4,043,234	Up 130%	<ul style="list-style-type: none"> • Increased sales due to increased rainfall in 2005
2007	3,387,618	Down 16%	
2008	1,136,219	Down 66%	<ul style="list-style-type: none"> • Demand down due to dry year • Decrease in demand from local and state government as well as consumers due to economy
2009	1,308,868	Up 15%	

Bituminous Roof Primer

Year	Sales (Gals)	Difference	Primary Reasons for Major Differences
2000	170,520		
2003	84,160	Down 51%	<ul style="list-style-type: none"> • Adhesives correctly reclassified as not architectural coatings • Reduced CA sales in 2003
2004	68,092	Down 19%	
2005	100,011	Up 47%	
2006	128,649	Up 29%	
2007	101,159	Down 21%	
2008	74,073	Down 27%	<ul style="list-style-type: none"> • Demand down due to dry year • Decrease in demand from local and state government as well as consumers due to economy
2009	57,797	Down 22%	

Clear Brushing Lacquer

Year	Sales (Gals)	Difference	Primary Reasons for Major Differences
2000	PD*		
2003	PD*	Up 21%	
2004	PD*	Down 1%	
2005	PD*	Down 15%	<ul style="list-style-type: none"> • Implementation of SCAQMD VOC limit of 275 g/l in January 2005 • Removal by SCAQMD of the quart exemption for clear wood finishes in July 2006
2006	PD*	Down 15%	
2007	PD*	Down 29%	
2008	PD*	Down 48%	<ul style="list-style-type: none"> • Removal by SCAQMD of the quart exemption for clear wood finishes in July 2006
2009	PD*	None	

* Protected Data, less than 3 manufacturers provided sales

Recycled Coatings

Year	Sales (Gals)	Difference	Primary Reasons for Major Differences
2000	323,216		
2003	87,939	Down 73%	<ul style="list-style-type: none"> • Decrease in demand
2004	223,381	Up 154%	<ul style="list-style-type: none"> • Better response rate to survey
2005	83,759	Down 63%	<ul style="list-style-type: none"> • Major manufacturer no longer in business
2006	159,038	Up 90%	<ul style="list-style-type: none"> • Major manufacturer began certifying products through Master Painters Institute and Green Seal • Major manufacturer received state contract with Caltrans
2007	160,137	Up 1%	
2008	107,275	Down 33%	<ul style="list-style-type: none"> • Decrease in state and local government contracts • Decrease in demand
2009	109,108	Up 2%	

Rust Preventative

Year	Sales (Gals)	Difference	Primary Reasons for Major Differences
2000	209,899		
2003	1,431,413	Up 582%	<ul style="list-style-type: none"> • Expect 2000 baseline was low, since category wasn't relevant until 2003 • Shift as expected from nonflat, industrial maintenance, quick dry enamel, and quick dry primer, sealer and undercoater
2004	2,095,500	Up 46%	<ul style="list-style-type: none"> • New products introduced
2005	2,246,560	Up 7%	
2006	2,047,304	Down 9%	
2007	1,357,917	Down 34%	<ul style="list-style-type: none"> • Implementation of SCAQMD VOC limit of 100g/l in July 2006
2008	1,096,413	Down 19%	<ul style="list-style-type: none"> • Implementation of SCAQMD VOC limit of 100 g/l in July 2006 • Incorrectly reported sales and incorrectly classified products corrected
2009	790,084	Down 28%	<ul style="list-style-type: none"> • Decrease in demand due to economy

Specialty Primer, Sealer and Undercoater

Year	Sales (Gals)	Difference	Primary Reasons for Major Differences
2000	376,521		
2003	1,918,556	Up 510%	<ul style="list-style-type: none"> • Expect 2000 baseline was low, since category wasn't relevant until 2003 • Shift as expected from quick dry primer, sealer and undercoater, and primer, sealer and undercoater • New products introduced
2004	2,009,464	Up 5%	
2005	2,286,703	Up 14%	
2006	1,931,440	Down 16%	<ul style="list-style-type: none"> • Implementation of SCAQMD VOC limit of 250 g/l in July 2006
2007	1,602,406	Down 17%	<ul style="list-style-type: none"> • Implementation of SCAQMD VOC limit of 100 g/l in July 2007
2008	1,091,053	Down 32%	<ul style="list-style-type: none"> • Implementation of SCAQMD VOC limit of 100 g/l in July 2007 • Incorrect product classifications corrected
2009	906,195	Down 17%	

Toxic Exempt Compounds

Methylene Chloride

Year	Emissions (lbs)	Difference	Reasons
2000	97,088		
2003	0	Down 100%	<ul style="list-style-type: none"> • Products no longer sold in CA
2004	183,032		<ul style="list-style-type: none"> • Better response rate to survey
2005	0	Down 100%	<ul style="list-style-type: none"> • Products no longer sold in CA
2006	0		
2007	0		
2008	0		
2009	0		

Perchloroethylene

Year	Emissions (lbs)	Difference	Reasons
2000	13,140		
2003	4,455	Down 66%	<ul style="list-style-type: none"> • Certain products no longer sold in CA
2004	61,809	Up 1387%	<ul style="list-style-type: none"> • Better response rate to survey
2005	0	Down 100%	<ul style="list-style-type: none"> • Products no longer sold in CA
2006	64,926		<ul style="list-style-type: none"> • Better response rate to survey
2007	76,351	Up 18%	
2008	37,395	Down 51%	<ul style="list-style-type: none"> • Natural sales variation due to project demand • Products no longer sold in CA
2009	32,904	Down 12%	