

CHEMICAL DISTRIBUTOR

Volume 45 | No 4
October-December 2020



Ready for
what the
future holds

INSIDE THIS ISSUE

- The road to recovery
- Protect your mental health
- Leaders respond to COVID
- Finding top talent
- Bridging the gender gap
- Focus on facemasks



Azelis expands its global presence into Latin America

Azelis is thrilled to announce the acquisition of Megafarma, Mexico's premier specialty distributor for the pharma, food and veterinary industries.

The addition of Megafarma into the Azelis global network strengthens our commitment to our valued principals and customers across Latin America, and is complementary to our strategy of sustainable organic growth. The transaction also creates a platform to build other market segments in Mexico, such as plastics, foam, CASE, personal care, and household & industrial cleaning.



Megafarma, headquartered in Mexico City, with offices in Guadalajara and Monterrey, represents some of the world's most renowned raw material producers and serves a large number of customers throughout all regions of Mexico.

**Innovation
through
formulation**

visit azelis.com/americas
megafarma.com.mx



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Upcoming Events

For more details, and to see the latest webinar schedule, visit
<https://www.nacd.com/education-meetings/education/online-education/webinars/>

*May be subject to change

November 18 and December 16, 2020

January 20 and February 17, 2021

ITR Economics: Managing in an Uncertain Economy

November 19, 2020

Respiratory Protection Webinar

December 8-10, 2020

Duke Program: Virtual Creating A Data-Driven Culture

December 8-11, 2020

Duke Program: Virtual Women Leaders: Elevating Influence and Impact

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A large white semi-trailer truck is shown from a low angle, moving towards the left. The side of the trailer features the Univar Solutions logo and the tagline 'Innovate. Grow. Together.' in orange and grey. The background is a dark, textured surface covered in a pattern of glowing orange and white binary digits (0s and 1s). A large, semi-transparent orange shape overlaps the right side of the image, serving as a backdrop for the text.

Going the Extra Mile

We're making a giant leap forward for the chemical & ingredients industry. Investing heavily in our digital tools means you can do business with us when it's convenient for you.

Whether you're in New York, Shanghai, Montreal or Paris, our 24/7 robust, industry-leading suite of digital tools make your job faster and easier. We're focused on our customers and working to improve the customer experience at every turn continually. From globalizing our core speciality industries like beauty and personal care, food ingredients and nutraceuticals, to further expanding our global footprint with supply partners, every step takes into account an optimum customer experience.

Curious? Contact us today or visit Shop.UnivarSolutions.com and discover our full product catalogue through an innovative e-commerce experience.

Welcome

Navigating uncharted waters

COVID-19 continues to provide its share of challenges since restrictions started taking place last March. With the fall season upon us, there remains a great deal of angst as to what lies ahead for our country and our industry. But there is good news to report from the last few months.

After years of effort, Congress approved a three-year extension of the Chemical Facility Anti-Terrorism Standards program, which President Trump quickly signed. I could not be prouder of the efforts put forward by our membership and staff to achieve this result. Thank you for your support on this important milestone.

The other good news is we are adapting. Member companies are embracing the virtual world by moving internal meetings to the screen and conducting client business via Zoom. Feedback from our surveys and frequent interaction with members indicate that chemical distributors, overall, are making it through these challenging economic times relatively well.

However, the climate in our nation remains unsettled, from protests to wildfires and hurricanes. Crisis management, diversity, unconscious bias, and sensitivity are not just buzz words, but necessary concepts that impact our communities – especially our employees.

To accommodate this ever-changing landscape, NACD is providing you with tools to ensure you can continue to meet your daily business needs. While we were unable to conduct an in-person ChemEdge event this year, we did offer a fantastic alternative virtual format. We have and continue to offer a wide array of webinars providing valuable information from your desktop. And while we are not able to gather this year for our 49th Annual Meeting, we are holding timely and notable virtual sessions addressing the current economic and political climate.

NACD remains committed to assisting your company as we continue to navigate the uncharted waters of COVID-19. Don't hesitate to contact me with questions or suggestions as to how we can improve what we do or something we should consider offering.

Wishing you and your team a very happy, healthy, and safe holiday season !



ERIC R. BYER

President & CEO, NACD
@ebyerNACD



BARENTZ ANNOUNCES MOVE TO PURCHASE MAROON GROUP

Barentz International, a leading global distributor of life science ingredients, has entered into a definitive, written agreement to acquire Maroon Group. The acquisition, expected to close this quarter, will expand Barentz' activities and is aligned with its strategy to become a global leader in the life science and broader specialty chemical industries. "Our product portfolios are very complementary," said Hidde van der Wal, CEO of Barentz. "We have no conflicts of interest and we can learn a lot from each other."

NEW DISTRIBUTION PARTNERSHIPS AGREED FOR TERRA FIRMA

Terra Firma has announced that industrial coating resins specialist Allnex has chosen the company as the newest member of its distribution network. Terra Firma will represent various Allnex technologies throughout the Northeastern and Southeastern U.S. Terra Firma will be focused on promoting Allnex's extensive emulsion, dispersion, and specialty water-based resin technologies along with solvent based 2K acrylic polyols, 1K thermoplastic acrylics, and alkyd resins. Meanwhile, Terra Firma and performance minerals specialist KaMin have also expanded their partnership, which began in 2000. From November 2, 2020, Terra Firma will begin representing KaMin in the Northeastern and Midwest Ohio Valley regions. Terra Firma currently represents KaMin in the Southeast and Southwest. KaMin offers a range of products that are used in multiple end markets ranging from paper and plastics, construction to food, pharmaceutical, and agriculture.

UNIVAR SOLUTIONS WELCOMES SEVERAL ADDITIONS TO ITS TEAM

Univar Solutions Inc. has made several new additions to its beauty care and nutrition team. Kelly Gilroy has been named vice president, beauty and personal care bringing nearly 20 years of specialty chemical and in-



IMCD US DONATES 80,000 MEALS TO FEEDING AMERICA

In acknowledgement of the National Day of Service and Remembrance, Cleveland-headquartered IMCD US is supporting communities across the U.S. by donating 80,000 meals to the Feeding America initiative. This donation was double the company's initial goal and was made possible through employee participation in the IMCD US "Get Fit for Hunger" summer challenge. "On behalf of the senior leadership team at IMCD US, I would like to thank every one of our employees for participating in this challenge," said Ayanna Hughey, human resources director. "There has never been a more important time to come together, to support each other from a wellness perspective, and to show our communities how much we care."

redient focused industry experience. Gilroy joined Univar Solutions in 2014. Kevin Hack has also joined as vice president, food ingredients. He has over 25 years of dedicated specialty chemicals and ingredients experience. He most recently served as vice president, portfolio management at Connell. Univar Solutions also welcomes Dawn Guay as global marketing and technical sales director, nutraceuticals. She, too, boasts over 25 years of industry experience.

SUSTAINABILITY REPORT SHOWCASES AZELIS' ACHIEVEMENTS

Azelis has published its first sustainability report as a testimony to its global sustainability efforts. This covers its 2019 group-wide sustainability performance and demonstrates how its commitments to sustainability are being implemented. The company believes only innovation and sustainable business can provide long-term partnerships with customers and suppliers, as well as considerable benefits to society.

"We're continually investing in the development of a new generation of sustainable formulations through the work done in our network of laboratories, whilst also introducing new initiatives to develop strategies that mitigate business risks as a consequence of climate change and social unrest," said Maria J. Almenar Martin, group safety, health, environment and quality and sustainability director at Azelis. "We hope this sustainability report gives our partners a clear view of our ambitions and goals, and our colleagues another confirmation of how sustainability is deeply-rooted in all we do."

MONSON STRENGTHENS ITS RELATIONSHIP WITH GERMAN MAJOR BASF

BASF has expanded its partnership with Monson, an Azelis Americas company, to distribute BASF's premium line of lubricant and metalworking components. The deal expands and enhances strategic growth with one of its key principals, BASF, and reinforces Monson's po-

sition as a leading lubricant and metalworking distributor in the U.S. The portfolio of BASF products now available from Monson include: Breox®, Pluracol®, Plurasafe®, Synative®, Amine® O, Sarkosyl® O, Prostab® 5198, Irganox®, Irgacor®, Irgapac®, Irgaflo®, Irgafos®, and Irgamet®.

MAROON GROUP ANNOUNCES NEW DISTRIBUTION DEALS

Maroon Group has formed a new distribution relationship with Dicalite Management Group (DMG), a global international industrial minerals company. Effective immediately, Maroon Group will be the exclusive distributor of DMG's Microlite line of high-performance vermiculite-based flame-retardant dispersions and powder for the coatings, adhesives, sealants, and elastomers (CASE) market in the U.S. and Canada. DMG's innovative flame-retardant technologies, teamed with Maroon Group's expertise, will provide differentiated value-added capabilities to cus-

tomers through technical proficiency and formulation expertise across North America. Maroon Group has also signed several additional distribution agreements. Effective immediately, Maroon Group is the exclusive distributor of Innospec's surfactant line for the CASE market in the U.S. It has agreed to another with Applied Graphene Materials (AGM). Maroon Group's CASE and technical sales and support team will leverage its extensive customer network to introduce AGM's proprietary Genable® graphene dispersions technology into the U.S. and Canadian coatings and polymers markets.

CITCO WATER REBRAND REFLECTS EXPERIENCE AND 90-YEAR LEGACY

Locally owned and operated CITCO Water, formerly known as C.I. Thornburg, Co. Inc., has unveiled its corporate rebrand, including a name change and new mission. Reflecting on its 1931 beginnings in product distribution of the water and wastewater markets, CITCO Water cites clients' successes and solution generation over their 90-year history to fuel their new mission, Solutions driven. Commitment given. "With my grandfather's vision achieved, we have renamed the company to CITCO Water to reflect our growth and experience in the water and wastewater industry," said CEO Jeff Morrison.

IMERYS PERFORMANCE MINERALS EXPANDS ITS PARTNERSHIP WITH IMCD

IMCD has expanded its distribution agreement Imerys Performance Minerals and is now its preferred distributor across the U.S. and Canada. The partnership is expected to provide customers with a consolidated point of contact, ready to provide access to Imerys' expansive multi-mineral product portfolio – backed by IMCD's technical sales expertise, laboratory support, and extensive footprint in the region. IMCD will represent nearly all Imerys mineral offerings, with the exception of air float kaolin in Canada. "This expanded distribution agreement is a

testament to the trust and confidence we strive to build with our supplier partners," said Marcus Jordan, Americas' president, IMCD. "Teaming up with IMCD across the U.S. and Canada means access to our coast-to-coast, market-focused technical knowledge and logistical reach, delivering effective solutions, driving innovation, and cultivating market growth."

J. RETTENMAIER GROWS TERRITORY WITH SUPERIOR MATERIALS

Superior Materials has expanded its territory for J. Rettenmaier USA into the mid-Atlantic and New England regions. This took effect from September 26. The agreement covers upstate New York (except Buffalo), Eastern Pennsylvania, Delaware, Maryland, Connecticut, Rhode Island, Massachusetts, New Hampshire, Vermont, and Maine. Superior

will be responsible for the full range of ARBOCEL® products for the industrial market segment including coatings, adhesives, sealants, elastomers, construction, and allied industries. Superior has been representing Rettenmaier since 2009 and its predecessor company in these markets, Interfibe Corporation, since 1985.

NEW PRESIDENT FOR MAROON GROUP'S HI&I SEGMENT

Maroon Group has announced that Jason Miller has succeeded Jeffrey Tannenbaum as president of its household, industrial & institutional (HI&I) vertical. As part of a long-term succession plan, Jeffrey and Barry Tannenbaum retired from the company effective June 30. Under the Tannenbaums' leadership, Maroon Group HI&I achieved unprecedented growth as the preeminent



distributor of specialty chemicals and ingredients to the HI&I and beverage markets. The company has also added several more members to its team, including Alex Reichert as the new operations manager for its Lincoln, Rhode Island, facility supporting the CARE vertical. He brings nine years of experience within the logistics and transportation industry and has held multiple leadership roles with UPS. The company has also added Todd Yonker (pictured) as a senior account manager for the CASE Midwest team, covering Michigan and Northwest Ohio. Beth Campbell also joins as human resources manager for the U.S.

QUADRA CHEMICALS REVEALS ITS NEW LEADERSHIP TEAM

From October 1, 2020 – and after many years of planning and preparation – the shared leadership of Quadra Chemicals Ltd. and Quadra Chemicals Inc. will be assumed by Philip Infilise as CEO and Anne Marie Infilise as president. Philip joined Quadra in 2000 and has held various roles throughout the organization. "I am humbled and honored to be following my father Tony Infilise in the role of CEO," he said. "With the strong leadership of Anne Marie as president, the outstanding executive team, and the Quadra family, we are very confident in our bright future. I believe that we have a tremendous opportunity to deliver value to all our stakeholders by continuing to take a long-term perspective as well as harnessing the power of our talented team to provide an exceptional experience to our



SEA-LAND CHEMICAL UNVEILS MULTIPLE NEW APPOINTMENTS

Sea-Land Chemical Company has welcomed Doug Honig as director of marketing. Honig held key leadership positions in marketing, digital communications, and vendor management at Parker Hannifin Corporation for the past 14 years, recently serving as digital merchandising and e-commerce campaign manager. Matt Mapus (above, left) has also been promoted to vice president of sales and marketing, effective September 1. As well as overseeing the marketing and technical departments, he will lead the North American sales team, supporting vice president of the east region, Christy Henley, and vice president of the west region, Jack McKenna, and their regional sales teams. Mapus has been with the company for 12 years, serving as vice president of marketing, product manager, and marketing specialist. Ted McClure (above, right), meanwhile, has been promoted to director of technical resources, while Brittany Hennings has been promoted to marketing communications manager – reporting to Honig.

customers and suppliers." Tony Infilise will focus on his roles of chairman of the boards of Quadra Chemicals and Infilise Holdings.

SMC GLOBAL REVEALS MODERN LOOK WITH BRAND REFRESH

SMC Global has rebranded and unveiled its new logo and website, www.smc-global.com. The new logo not only reflects a more modern look but also incorporates a new slogan, "a Different Kind of Chemistry", encapsulating the company's unique approach to establishing long-lasting relationships with customers, stakeholders, suppliers, communities, and employees. "Our new look and name will reinforce the new and evolving company," said Adam Feldman, CEO and co-founder of SMC Global. "What this means for our existing clients and prospects is that it

is business as usual, with the mission to be a crucial part of the supply chain for small and large industrial chemical manufacturers and distributors. We strive to improve and provide the best experience without letting anyone down."

MAROON GROUP MAKES MOVE INTO MODERN NEW JERSEY OFFICE

Maroon Group has relocated its CASE Northeast Clinton, New Jersey, office to 53 Frontage Road, Suite 255 Hampton, NJ 08827. The transition to a newer, more modern facility is another step towards transforming Maroon Group from a regionally-focused operation into one fully integrated world class North American distribution platform. "Our new office is a major milestone for Maroon Group and is a humbling reminder of the hard work from our entire team

to build our business," said Kelly Galle, operations manager. "We're pleased to be expanding our operation to a new commercial complex with significantly more space to support our continued growth. This move represents our continued ironclad commitment to best-in-class customer service and support to our customers, principal suppliers, and commercial teams."

AMI PARTNERS SIGNS PARTNERSHIP WITH LINTECH INTERNATIONAL

Active Minerals International LLC (AMI) has signed a non-exclusive agreement with Lintech International LLC to manage its portfolio of air-float kaolin clay products into the adhesives, coatings, composites, building products, and sealants markets. The agreement took effect from August 3. The kaolin product portfolio

includes the Acti-Min® series of "soft" clay products along with "hard" clay products Secco Clay™, Carotex Clay™, and Crown Clay™.

ELAINE ANDERSON JOINS SUPERIOR MATERIALS' TECHNICAL SALES TEAM

Specialty chemicals distributor Superior Materials, Inc. has added Elaine Anderson to its technical sales team as Midwest regional account manager responsible for Ohio, Western Pennsylvania, Western New York, Kentucky, and parts of Michigan and Indiana. She will be responsible for the company's sales of ingredients to CASE, graphic arts, plastics, construction, personal care, and allied industries. Anderson started her career as a formulator and then moved into technical sales support, direct sales, and sales management.

In recent years, NACD has offered our association's members the opportunity to attend Duke University's Executive Education programs which include a growing number of in-person and virtual offerings. Through the generous support of Datasor, Inc., NACD has been able to offer these courses at a discounted rate for all participants. NACD extends our sincere gratitude to Datasor for recognizing the value of these programs to the chemical distribution industry and offering their continued support for NACD's education programs.



Duke Executive Education Now has Virtual Programs!

- Virtual Business Negotiation Skills Program
- Virtual Financial Analysis for Non-Financial Leaders
- Virtual Creating A Data-Driven Culture
- Virtual Navigating Health Care Trends
- Virtual Leading Business Strategy for Operational Excellence
- Virtual Communication for Leaders for the Digital Age
- Virtual Duke Management Program
- Virtual Women Leaders: Elevating Influence and Impact

Check the NACD website to learn more and register at www.nacd.com/duke



THE VIEW FROM WASHINGTON

THE ERA OF HYPERPARTISANSHIP

Whatever happened to the good old days? Let's lower the rhetoric, stop all the shouting, and get back to making the best decisions for the country

Eric Byer Washington DC

When drafting this View from Washington piece, I purposely waited as long as I could to put pen to paper, as things change so rapidly in today's world that I did not want to miss any new developments that arose here in "the swamp".

Well, I am glad I did. Just when you think things in Washington could not get any darker, U.S. Supreme Court Justice Ruth Bader Ginsburg passed away and both sides immediately dug in on who should replace her seat and how the process should be conducted.

In many ways, Justice Ginsburg's passing showcases yet again how politics have become so unbearably uncivil over the last few years, but especially this year with COVID-19.

This lack of civility has crippled the policy-making process in Washington. It was not too long ago that both sides of the aisle could gather together to hash out difference on issues with an ultimate agreement. Was it perfect? No. Was it better than the alternatives? Absolutely.

WORKING TOGETHER

In today's world, if you do not like something or someone, you take to Twitter, Facebook, Instagram, or whichever other social media outlet of your choosing and blast away. It does not matter what side of the aisle you are on.

I have caught myself on more than one occasion wanting to scream at the top of my lungs to blast my local school board officials because of the poor decisions they are making that effect my children. And why? Because all too often the groups that make the most noise appear to come out victorious or have the most impact.

So why not keep screaming, you might ask?

"Congress has approved a continuing resolution that will keep the government funded and operating through early December. The one area where we must see action is on trade."

Well, because as Americans, not Democrats, not Republicans, not Independents, but as Americans, we need to find some type of silver lining that we can identify as a unifier to lower the rhetoric and get back to making some decisions for this country.

The rhetoric we see on social media has become so loud and out of control that we are becoming paralyzed as a nation in doing anything legislatively at a time when this country needs things passed more than ever. For example, infrastructure development is one area where Republicans and Democrats have historically been able to compromise. It is clear, even with today's heightened levels of rhetoric, that both parties want to see a long-term measure.



President Trump wants a \$1 trillion deal and Democrats want \$3 trillion. Between those two proposals, there must be some middle ground to agree on a long-term solution. In fact, I know there is within certain factions on Capitol Hill. But because of the heightened rhetoric, especially during a presidential election year, this type of legislation will not see the light of day.

Thus, I do not foresee much taking place between now and the end of 2020 with the theatrics of election year politics ongoing.

PROGRESS ON TRADE

Congress has approved a continuing resolution that will keep the government funded and operating through early December. The one area where we must see action is on trade. The association continues to make every effort in working with Congressional leaders to secure extensions to the Generalized System of Preferences (GSP) program and the Miscellaneous Tariff Bill (MTB) that both expire on December 31.

There is plenty of bipartisan support, but with limited legislative time left this year, securing extensions for both programs has been and continues to be very challenging. We will continue to do everything we can behind the scenes, but we can always use member support via our ChemReactions website where we have alerts on these measures for you to complete and send to your elected officials.

While these are challenging times, I remain hopeful that after this year's election, regardless of the winner, we will see some renewed willingness to address issues like long-term infrastructure development and trade in a bipartisan and less-threatening manner than we have seen lately. It is time to get back to work in a civil and productive fashion. ■

Virus sharpens strategic focus

The upheaval caused by the coronavirus pandemic will accelerate key macro trends, manifesting in new projects, as well as mergers and acquisitions

Joseph Chang New York

The scramble to preserve liquidity amid a devastating decline in business activity due to the COVID-19 outbreak and resulting mass lockdowns worldwide led chemical companies to aggressively slash capital expenditures (capex) and take other cost cutting measures.

Ultimately, with limited financial resources, this has greatly sharpened their business portfolio and investment priorities. Global chemical mergers and acquisitions (M&A) nearly ground to a halt during the Q1 lockdowns because of the severe hit to profitability, social distancing limitations, and turbulence in financing markets.

However, aided by central bank liquidity measures and coming out of the trough, companies have refocused on streamlining their portfolios and being more selective in investments – whether in M&A or capex.

"One difference between the past crisis [of 2008-2009] and today is that liquidity seems to be available. People have cash and are [able] to find sources of liquidity," says Federico Mennella, managing director and co-head of the global chemical and materials practice at Rothschild & Co.

With the U.S. Federal Reserve backstop and efforts from global central banks, chemical companies have largely been able to refinance debt.

With immediate liquidity concerns largely on the backburner and a recovery underway, companies are once again taking stock of their portfolios and engaging in forward strategic thinking regarding M&A – on both the buy and sell side.

CARVE-OUTS TO DRIVE M&A

A key M&A trend set to accelerate is that of corporate carve-outs. Pre-pandemic, chemical companies were already carving out non-core assets for sale, but now the crisis will light a fire under managements to take action more quickly as they sharpen their investment priorities.

"Active portfolio management – both acquisi-

tions and divestitures – remains integral to [chemical companies'] overall strategy. This is good news not only for sellers of privately held businesses, but also for companies that are contemplating a corporate carve-out," say investment bankers at Grace Matthews.

"From a size perspective, many of these middle-market businesses would fit perfectly into strategic acquirers' search for 'bolt-on' size transactions that are big enough to be impactful without being so large that they represent a transformational 'bet the farm' transaction," they add.

EUROPE PLAYS CATCH-UP

U.S. chemical companies have been leaders in carve-outs in recent years, with multiple divestments by Dow, DuPont, Huntsman, Ashland, PPG, FMC, W.R. Grace, PolyOne, and others – and now European conglomerates are playing catch-up.

The prevalence of European carve-outs today points to an evolution from conglomerates to pure play enterprises, says Alain Harfouche, managing director at Guggenheim Securities.

"The evolution for the most part has taken place in the U.S. and played out very well. From a competitive standpoint, companies have really bolstered their positions and we're now seeing this in Europe. Carve-outs are just the result of the execution of more of a pure-play strategy," he adds.

"Fast forward 10 years and it's going to make its way to Asia where many companies currently tend to operate with a conglomerate mindset," he notes.

Germany-based BASF, perhaps the world's most diversified chemical company,



"Companies are taking stock of their portfolios and engaging in forward strategic thinking regarding M&A"

Joseph Chang

Global editor, ICIS Chemical Business



has been very active on the carve-out front, having closed the sale of its construction chemicals business to private equity firm Lone Star for €3.17bn (\$3.74bn) and in the process of selling its pigments business to Japan's DIC for €1.15bn.

On September 30, Netherlands-based DSM announced the sale of its resins & functional materials (RFM) business to Germany-based Covestro for €1.6bn, another step in its transformation into a company focused on nutrition, health, and sustainable living.

Also in September, Germany-based Evonik announced it is carving out its superabsorbent polymers (SAP) business for a potential sale or partnership. In late July 2019, it completed the sale of its methyl methacrylates (MMA) business to private equity firm Advent International for €3bn.

Switzerland-based Clariant, coming off the sale of its masterbatch business to PolyOne, is now turning its attention to the sale of pigments, while France-based Arkema completed the sale of its functional polymers business to South Korea's SK Global Chemical for €335m on June 1.

Arkema in April also announced a strategic review of options for its methyl methacrylate (MMA) and polymethyl methacrylate (PMMA) business.

Belgium-based Solvay, at the end of July, announced it is exploring strategic options to monetize certain unspecified businesses, predominantly within its solutions segment. The segment includes oil and gas, mining, automotive, and building and construction.



REX/Shutterstock

At the end of June, UK-based BP announced a full exit from petrochemicals, selling the aromatic and acetyls business for \$5bn to INEOS.

Outside of Europe, Mexico's Orbia Advance (formerly Mexichem) said in January it is considering a divestment or partnership for its vinyls business.

And on September 28, US-based Hexion announced the sales of its phenolic specialty resin, hexamine, and European-based Forest Products Resins businesses for around \$425m to private equity firms Black Diamond and Investindustrial.

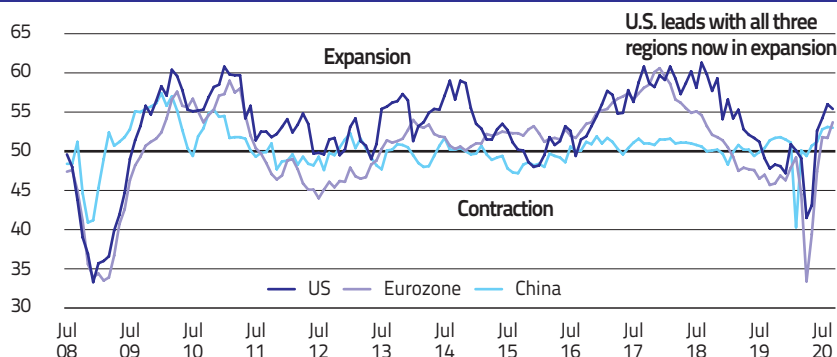
The global chemical industry is also shifting its mindset and investment dollars toward localization of supply, even in the case of bulk commodity chemicals, in an effort to "minimize molecular tourism", as Dow's chief financial officer put it.

"We have a mantra inside the company to minimize our molecular tourism. The cost to move product from one continent to another, between the outbound freight, storage on either end, the freight across... regardless of what the duties are... oftentimes two to three times the cost to turn our monomers into fully formulated polymers or emulsions or formulations," said Howard Ungerleider, Dow chief financial officer, on a BMO Capital Markets conference call in June.

"So, minimizing molecular tourism and producing in the country where the consumption is, has always been a key part of our strategy, as is the feedstock flexibility," he added.

This trend is accelerating in the face of trade disputes, increasing protectionism and the em-

GLOBAL MANUFACTURING PMI



NOTE: Figures through Sep 2020, US = ISM, Eurozone = IHS Markit, China = Caixin

phasis on security of supply in the wake of major disruptions caused by the coronavirus lockdowns.

And it has major implications for chemicals investment on a regional basis. For example, building a cracker complex in the U.S. or even the Middle East with advantaged feedstock to produce polymers for export across long distances may not be ideal in this new paradigm.

And as capex budgets for 2020 and beyond get slashed amid the pandemic, this will sharpen managements' investment priorities.

U.S.-based LyondellBasell is investing directly in China, with the Bora joint venture cracker project in Panjin, Liaoning, China with polyethylene (PE) and polypropylene (PP) downstream having started up in August 2020. It is also working on finalizing a JV with Sinopec to build a new propylene oxide/styrene monomer (PO/SM) unit in Zhenhai, Ningbo, China.

"The thesis around that [Bora] investment is about producing in China, for China," said LyondellBasell CEO Bob Patel on the company's Q1 2020 earnings conference call on May 1.

That is literally and figuratively thousands of miles away from the concept of building mega complexes in the U.S. to produce pellets to export to China. Yet, LyondellBasell on October 2 announced the \$2bn acquisition of a 50% stake in Sasol's newly built Lake Charles, Louisiana, cracker and downstream PE units – an opportunistic deal done at an estimated 50% discount to replacement cost with a motivated seller.

China is working toward boosting self-sufficiency in polyolefins, but it will still have a massive deficit in PE in particular for years to come.

Northeast Asia, which is dominated by China from a market perspective, is projected to see net imports of PE shrink from over 14.5m tonnes in 2020 to under 12m tonnes by 2023, according to the ICIS Supply and Demand Database.

ExxonMobil was also planning a mega cracker project at Dayawan Industrial Park in Guangdong, China. On April 22, ExxonMobil participated in a

virtual ceremony to celebrate progress on the project. However, plans for the project are unclear as ExxonMobil has yet to make a final investment decision. Downstream products would include PE and PP, along with butadiene and aromatics.

Essentially, rather than build another cracker in the U.S. – other than the Texas cracker under construction in a JV with SABIC – to primarily export polymers, ExxonMobil aims to build capacity where the demand growth is – in China.

It is clear companies are already planning a shift in supply chain and investment priorities. That does not mean the U.S. and the Middle East will not see major cracker and other chemical projects anymore – it will just be less, as limited capital budgets get prioritized toward net import demand centers.

ECONOMIC OUTLOOK

Meanwhile, U.S. and global economies continue to recover from their coronavirus lockdown-induced lows, though choppyly.

The manufacturing purchasing managers' indexes for the three major regions – the U.S., Eurozone and China – were all in expansion territory (above 50) for the third consecutive month, with the U.S. leading. This synchronized recovery off the coronavirus-induced lows in Q2 is very encouraging, although risks linger.

For the U.S., the automotive and construction sectors are recovering better than expected in the third quarter from their pandemic lows, providing a tailwind for the chemical and plastics industries.

The American Chemistry Council's Chemical Activity Barometer (CAB) – the trade group's leading indicator for U.S. industrial production – rose 1.6% in September on a three-month moving average basis after a 2.7 percent gain in August. Year-on-year, the September reading was down 4.3 percent.

"With five consecutive months of gains, the September CAB reading is consistent with recovery in the U.S. economy," says ACC chief economist Kevin Swift. ■



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The road to recovery

There are certainly some positive signs for the economy, and it would be wise to start planning for the year ahead, says Jackie Greene of ITR Economics

As we begin the fourth quarter of 2020, there are many encouraging signs that support our outlook for recovery and rise in U.S. Real Gross Domestic Product (GDP) during the second half of this year and into 2021.

Part of our confidence in a sustainable U.S. macroeconomics recovery and business cycle rise comes from the abundance of leading indicators already rising. A consistent trend across at least five of our 12 key indicators would typically validate our macroeconomic expectations; at this point, all 12 are actively rising.

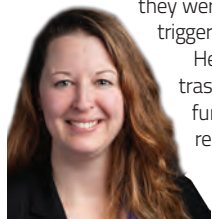
If your business moves through the business cycle in a coincident manner with GDP, you are likely seeing – or will soon be experiencing – some recovery in your business. Those who move more closely with the U.S. industrial sector should also be beginning to feel the effects of a nascent rise in quarterly U.S. industrial production.

Looking further into 2021, we expect the general macroeconomy to rise. If you trend in sync with the standard U.S. economic benchmarks, such as GDP or U.S. industrial production, you can generally expect your business to rise as well. For many, it will be important to note that such a rise will not likely result in pre-COVID-19 heights of activity during the coming year. In general, however, the economy will rebound faster than following the 2008 recession.

There are some significant differences between now and then that support our expectation for a quicker recovery than what followed 2008.

For one, the economy was not broken going into the pandemic. There were some weaknesses – trade wars and oil prices, for example – but they were fueling the already-underway mild recession; they were not extreme enough to trigger a sharp recession.

Heading into 2008, by contrast, the economy was facing fundamental health issues related to over-leveraging and a housing market asset price bubble that



"The overall preponderance of evidence is pointing towards general recovery ahead"

Jackie Greene

Director of economics, ITR Economics



needed to be resolved. This is not to say all is clear ahead for the U.S. economy. The following are downside threats to our forecast for recovering quarterly GDP and industrial activity in the second half of the year:

■ **The onset of the fall flu season and/or a second wave of COVID-19 could lead to additional reopening reversals.**

■ **Month-to-month momentum in U.S. total retail sales stalled in August.**

■ **Oil prices and U.S. intermodal rail traffic showed some jitters in September.**

■ **There is uncertainty regarding unemployment benefits and the possibility of additional fiscal stimulus.**

Please note that the above are not yet statistically meaningful. They are simply emerging risks of which you should be aware. Keep in mind that some volatility is normal, and that the overall preponderance of evidence is pointing toward general recovery ahead.

The overall trajectory of the U.S. chemical industry has paralleled that of the macroeconomy. For two years, we had been forecasting that the U.S. chemical industry would contract in 2020. In line with our expectations, annual average production began contracting in May 2019. The onset of COVID-19 intensified the decline as many end-use markets also contracted.

In alignment with our expectations that markets will recover faster this cycle than post-2008, we

look to the auto sector. North America light vehicle production surged in July and August as manufacturers pushed to make up for 2020's earlier shut-downs. Year-to-date U.S. auto retail sales totaled nine million units, about 16 percent above year-to-date production, which totaled 7.7 million units. This discrepancy is largely due to virtually zero production in April and May. We expect automakers will "play catch-up" into late this year to replenish inventories, as retail sales typically run only slightly ahead of production (zero to five percent).

Contraction in U.S. pharmaceutical and medicine production has not been as long-lasting or severe as in overall U.S. chemicals production. Our analysis suggests that recovery for the pharmaceuticals market will take shape in sync with the overall chemicals market.

Performing even better still, U.S. plastics material and resin production has avoided outright recession thus far into 2020 and will likely continue to outperform the overall chemicals market through at least the remainder of this year.

Expect 2021 to be a better year for most of the chemical industry's end-use markets.

Accordingly, ask yourself what you can be doing today to accommodate economic expansion next year and into 2022. Take advantage of pessimism at the bottom of the business cycle to get ahead of the competition. Consider capital expenditures now, while interest rates are relatively low, or consider strategic acquisitions. ■

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Playing a vital role

Industry must do more to highlight the overwhelming positives of the energy and materials it produces, says Alex Epstein, president of the Center for Industrial Progress

Energy is the industry that powers every other industry. Abundant food, clothing, shelter, medical care, and education all require reliable, low-cost energy.

Today, there are nearly one billion people without any electricity, and three billion who use virtually no energy. I call them members of the “unempowered world”. There are three billion who use some energy, but far less than we use in the U.S. I call these members of the “barely empowered world”.

Raising the unempowered and barely empowered worlds to the level of abundance of the empowered world we in the U.S. are fortunate to live in will require a dramatic increase in energy production in the coming decades and generations.

That dramatic increase in energy production means an increase in hydrocarbon use – not the rapid decrease that is prescribed by so many of our thought leaders.

Hydrocarbons are dismissed as the energy of the past and we’re told that we’re rapidly transitioning away from them to “green” or “renewable” alternatives – above all, solar and wind energy.

The reality is very different. Wind and solar energy make up some three percent of the world’s energy use. Why so little?

It’s because wind and solar are unreliable sources of energy. As a result, they can’t replace our reliable power plants, only duplicate or supplement them at tremendous cost.

That’s why the more wind a grid uses, the more expensive its electricity tends to be.

For example, wind and solar leader Germany has seen electricity costs rise 100 percent over the last decade, with



“The benefits of our hydrocarbon society were never clearer than during the coronavirus pandemic”

Alex Epstein

President, Center for Industrial Progress

Hydrocarbons remain the world’s best source of reliable, low-cost energy



the average German household paying three to four times as much for electricity as Americans.

The assumption that wind and solar can easily replace fossil fuels fails to recognize that producing reliable energy at low cost on a large scale is an extremely difficult achievement.

Energy producers have exploited the remarkable attributes of fossil fuels – which store energy in a highly concentrated way and exist in abundant quantities – to produce reliable, low-cost energy for electricity, transportation, and heat, on a scale of billions of people in thousands of places.

Nothing comes close to hydrocarbons. That’s why they supplied 81 percent of the globe’s energy use in 2018, according to the International Energy Agency. And hydrocarbons are still the world’s fastest growing source of energy in absolute terms.

The growth of hydrocarbon energy has empowered billions to use machine power to go from low productivity and poverty to high productivity and prosperity.

Thanks to the growing use of reliable, low-cost hydrocarbon energy, the percentage of the world’s population living on less than \$1.90 a day has fallen from nearly 36 percent in 1990 to less than 10 percent today, with average global life expectancy reaching unprecedented heights (from 46 in 1950 to 71 in 2015).

What about climate? While temperatures have risen some one degree Celsius in the past 170 years, some of which I do believe is attributable to CO2 emissions from fossil fuels, we are actually safer than ever from climate danger thanks to our incredible adaptive abilities. Climate-related deaths have decreased 98 percent over the last century. And what makes us so adaptable? In large part, reliable,

low-cost energy from hydrocarbons that we use to build and power our ultra-resilient civilization.

In addition to being the world’s best source of low-cost, reliable energy, hydrocarbons are also the world’s best source of low-cost, versatile synthetic materials.

Whether it’s roofing that protects us from the rain, tires that can endure tens of thousands of miles, insulation that keeps us cool in the summer and warm in the winter, or medical materials that enable an artificial limb or even heart to be part of our body, the modern world is made of hydrocarbons.

The benefits of our hydrocarbon society were never clearer than during the coronavirus pandemic, which would have been far worse without them.

Imagine the fate of medical staff and patients were it not for hydrocarbon synthetics that made up N95 masks, face shields, and respirators. And what of our chances of developing a vaccine without reliably powered medical labs or industrial plants constructed and prepped using hydrocarbons so we can rapidly mass produce a vaccine once it’s developed.

The only threat to a flourishing hydrocarbon future is government policy that attempts to rapidly eliminate hydrocarbons. If we want to avoid catastrophic policies like the Green New Deal, it’s important that the hydrocarbon industry tell its story. ■

Find out more at energytalkingpoints.com.

Alex Epstein is among the speakers at this year’s virtual Annual Meeting, which takes place from November 10-12. To register and find out more, visit <https://www.nacd.com/education-meetings/meetings/2020-annual-meeting/>

Mind over matter

COVID-19 is taking a toll on our physical wellbeing, lifestyles, and livelihoods – but it is also having some very real consequences on our mental health

Andy Brice London

Depression and anxiety disorders cost the global economy \$1 trillion each year in lost productivity. This damning statistic from the World Health Organization reflects the scale and significance of mental health problems in the workplace.

With the advent of coronavirus and its far-reaching effect on every part of our lives, it is little surprise that employers are raising efforts to help and support their staff during these difficult times.

Depression remains the number one reason for people going on disability – far outweighing any physical condition – and this can have a major impact on a business' bottom line. Recent reports suggest there has been a tripling in the number of those in the U.S. experiencing anxiety and depression.

Failing to provide treatment, or adequate advice and guidance, means higher levels of absenteeism or indeed, presenteeism – where people come to work but are not engaged or doing their job properly.

It is far more cost effective to take action than to ignore the problem, according to Darcy Gruttadaro, Director of the Center for Workplace Mental Health at the American Psychiatric Association Foundation (APAF).

The root of any business is its people, and they need to be nurtured and cared for. They are, after all, your most valuable commodity.

"I think mental health has become the secondary story of the pandemic," she says. "Not only are many people experiencing depression, anxiety, and substance abuse, but projections suggest we could see a spike in suicides. It's all very concern-

ing and we are still on an upward trajectory."

A particularly sharp increase in anxiety levels is being seen in those aged 30-50 – among them parents who are having to juggle full-time jobs while home educating their children.

"We're already seeing a high level of job losses, so there are real concerns that people showing they have stresses and anxieties could jeopardize their job and lead to an erosion of confidence," says Gruttadaro.

But the impact of the pandemic has spanned beyond just that demographic. It has been a difficult period for every age group. Those living alone are suffering from isolation, the elderly are feeling disconnected, and the young are lacking the social interaction they are used to. Those in the 18-29 age group are currently seeing the highest rates of anxiety and depression.

COVID-19 is breeding loneliness and fear. Meeting friends or family, usually our preferred coping mechanism when times are tough, is all but impossible thanks to social distancing rules. Instead, everyone has been forced to change the way they interact and engage.

"We are facing a trifecta;

"We are facing a trifecta; we have a pandemic, racial and social tensions, and an economic downturn as well"

Darcy Gruttadaro
Director, Center for Workplace
Mental Health, APAF



we have a pandemic, racial and social tensions, and an economic downturn as well," says Gruttadaro. "This is uncharted territory and we have never been in a situation like this before. That means we can't even draw on past experiences. There is no precedent and there are therefore no usual measures we can follow."

"We should also not forget that there's a lot happening in the U.S. right now besides COVID," she says. "We've had storms, wildfires, and now the election. Our country is currently unrecognizable, and that brings its own set of stresses."

BACK TO WORK

The economy has clearly been hit hard by COVID-19 and everyone is keen for a return to some semblance of normalcy as soon as possible.

Fortunately, chemical companies were recognized as essential critical infrastructure, so the sector was permitted to stay operational and keep its plants, facilities, and the supply chain open. However, those having to work throughout such a difficult and uncertain period had to endure additional fear and distress.

The lockdown early in the pandemic also led to a seismic shift in working patterns – bringing with it an altogether different set of strains and pressures. Teams were divided, shifts and rotas were introduced, and many suddenly had to adapt to working from home.

Even with restrictions now easing and more people starting to return to the workplace, that has seen stress levels climb further still.

"It's going to be quite a challenge coaxing society to get back to normal – encouraging people to come out of their shells and interact more," says Erin Berman, clinical psychologist and staff scientist at the National Institute of Mental Health. "Some will have social anxieties and be perfectly happy to stay at home, so I think that transition will be tough. We'll need to get out of that comfort zone and reintegrate."

"I think it's really important that business leaders start thinking about this next phase now," she says. "It couldn't hurt to start thinking more about flexible work schedules and onsite counseling, for example, or about making more resources and support available. Hopefully, if this is something that becomes part of the office culture and can be maintained, it can only help

COPING DURING COVID

Free and confidential support is always available no matter your role or responsibilities. The websites below offer guidance and counselling to help manage stress and anxiety during the pandemic.

APAF guide to working remotely

■ <http://workplacementalhealth.org/Employer-Resources/Working-Remotely-During-COVID-19>

CDC: Managing Stress and Anxiety during COVID-19

■ <https://tinyurl.com/v5mbs7m>

Crisis Text Line

■ <https://www.crisistextline.org/>

Mental health during/beyond the pandemic

■ <http://workplacementalhealth.org/Employer-Resources/Employee-Mental-Health-Well-being-During-Beyond>

National Suicide Prevention Lifeline

■ <https://suicidepreventionlifeline.org/>

SAMHSA Disaster Distress Helpline

■ <https://www.samhsa.gov/find-help/disaster-distress-helpline>



Coronavirus is not going away, so we need to take care of our mental health

with productivity and wellbeing. They should put plans in place and prepare."

TELLTALE SIGNS

Tolerance and understanding will be absolutely vital during this transition. Many employers are already offering some form of counseling, mindfulness, and even meditation to help smooth the process.

At times like these, there is a fine line between feeling morose one minute and suffering extreme emotional or psychological strain the next. Berman says it is therefore essential that leaders learn how to identify the telltale signs someone is suffering. There are many indicators, including stress, fatigue, sleep issues, poor concentration, and increased irritability.

"Coronavirus is not going away anytime soon and we're facing a difficult period because of all the uncertainty, job losses, and grieving," says Berman. "This is a long-term issue and people will need long-term assistance; the stresses are not going away and will have consequences. If we don't do something, the fallout will continue."

Sadly, there is still a stigma attached to mental health and that deters some from asking for help. Some industries, however, are far more progressive than others and encourage open discussion about this difficult subject.

"Some sectors are male dominated and tend to have a culture that is stoic. They have a perception that depression and anxiety are a sign of

weakness, that you should pull yourself up by the bootstraps and just get on with it," adds Gruttadaro. "This is sadly still a taboo in the workplace and many stereotypes persist. Fortunately, many companies are now stepping up and raising awareness by educating the workforce. They've recognized that it's costly not to bring mental health into the light. And I think barriers have come down even more because of COVID-19."

"Knowing how to talk about it is really important," she adds. "Managers and supervisors must recognize the signs and act. Leadership sets the culture, and their willingness to open up will make all the difference."

Most people do not have the natural inclination to speak up and ask for help, but businesses are increasingly paying more attention to their needs. It is important therapy to talk to someone who can challenge any negative thoughts. Normalizing



"This is a long-term issue and people will need long-term assistance; the stresses are not going away and will have consequences"

Erin Berman

Clinical psychologist and staff scientist, NIMH

those conversations will help people feel more comfortable about coming forward.

"I definitely think people are more willing to ask for help now," agrees Berman. "We've seen a big increase in tele-health, which I think has really helped people. Live video and phone calls help remove any accessibility barriers and allow them to get help from the comfort of their own home. We are fortunate, at least, that modern technology allows us to come together virtually. We're physically distant but not socially isolated."

Under federal law, employers are required to provide mental health benefits if they provide a plan to their employees, she says. As a manager, it is important to make sure your company's health plan is providing the right support. They should be regularly checking in with their Employee Assistance Program (EAP) vendors to make sure their staff are making use of the resources available to them.

Gruttadaro suggests companies follow the LEAD principle:

■ **Leadership.** Effective managers and business owners are those who prioritize mental health and wellbeing. They set the culture in their organizations and are in the best position to normalize what people are experiencing. Leaders who are willing to show empathy and vulnerability are opening the door for people to get help when they need it.

■ **Effective communication.** Let employees know you are there to listen if they need someone to talk to. Create feedback loops to make them more comfortable sharing and discussing any issues.

■ **Adapting to change.** Deadlines are important but it may be necessary to relax some of them and consider your policies and practices. The best leaders recognize the need to make some allowances and be more accommodating during these tough times.

■ **Double down on access to care.** Remind people they have an EAP that is there to support them. Highlight the benefits it brings, check the policies, and work closely with the EAP to make sure all available support and resources are easily accessible.

APAF has published guides about working remotely and how best to support team members, she says. It will also soon launch a new online e-learning training initiative called "Notice. Talk. Act. at Work". The program's content is based on the insight and feedback gathered across multiple industries and explores the early warning signs of stress and how to offer the right help.

As we approach the end of the year, COVID-19 continues to touch every part of our personal and professional lives. Our world certainly looks very different from a year ago.

Medicines and potential vaccines offer hope of a return to normalcy and should help to heal the wounds of the past few months. Some of the scars of the pandemic, however, will run deeper. The best leaders are those who realize that our mental health may take a little longer to recover. ■

Jane Gibson London

In June, PwC surveyed 330 U.S. chief financial officers (CFOs) and finance leaders for its CFO Pulse Survey—the sixth since March when the COVID-19 pandemic started. The survey focused on plans for the return to the workplace, investment, and future strategies in the context of the “new normal”.

PwC says that concerns about a new wave of COVID-19 infections top the list of threats to recovery and is a worry for 59 percent of the U.S. finance leaders surveyed.

To put the survey in context, it was carried out after states began lifting stay-at-home orders and businesses started to reopen. However, fears of a second COVID-19 wave were mounting, and the Federal Reserve cautioned a 6.5 percent contraction in economic growth for the year. This was reflected in the survey results, with 47 percent of finance leaders expecting a drop in revenue of more than 10 percent in 2020.

Considered essential businesses during the pandemic, chemical distribution facilities remained open to help keep coronavirus-combatting chemicals moving. The chemical distribution industry found itself having to rapidly implement new security measures and new ways of working to support chemical supply chains. Alongside this, it found itself evolving into a more digitally native industry.

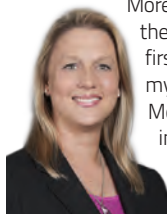
While the chemical distribution sector may have seen less of a downturn than other more customer-facing industries, it has still suffered from a substantial drop in end-user demand.

Deciding if, and when, to invest in new products, people, and technology is a complicated decision for chemical distributors since major downstream markets such as construction and automotive have such an unclear demand outlook.

“Without a doubt, there are several uncertainties facing the chemical distribution sector,” says Sarah Rodriguez, Principal at PwC. “The one that gets the most discussion is the timing of when we will return to ‘normal’. This is the least of the uncertainties though, as we will likely begin emerging from the pandemic in 2021 by most accounts.

More important than ‘when’ is ‘what’ the new normal will look like. The first element is the overall economy and how quickly it rebounds. Most observers are now expecting a recovery that could take two to three years.”

Rodriguez also points out



“Agility is going to be key. Creating flexibility in the value chain will help companies respond quickly as changes occur”

Sarah Rodriguez
Principal, PwC



Study considers COVID reaction

Business leaders across the U.S. are assessing how best to take those tentative steps back toward normalcy

that issues and trends in global trade are a major development that will shape where and how the industry can – and should – move its products. “Ongoing nationalist sentiment triggered several trade wars and has disrupted the global trade dynamic. The results of elections across a wide-swathe of countries will determine when and if this trend will reverse in the coming two to five years.”

Workplace behavior will have changed in the post-COVID world, remarks Rodriguez. The survey found that 54 percent of CFOs plan to make remote work a permanent option. However, increased telecommuting will likely depress the travel sector as well as commercial construction as

more firms move to hoteling, and businesspeople are more comfortable with video meetings than in-person meetings.

“This may represent a structural change in the relationship between GDP, population, and demand for offices and hotels,” she says. “The secondary impact will be on automobile companies as fewer commuters/commuter miles will likely defer or reduce new car purchases in the coming years.”

Rodriguez admits now that while markets have identified what the uncertainties are, what to do about it is not as straightforward. “One would likely say, ‘that depends’ which is hardly helpful. In reality, companies will need to have a cold-eyed view of



The chemical distribution sector can certainly take some positives from its evolution during the pandemic

REX/Shutterstock

restrictions were in place. Training webinars have been attended and even this year's ChemEdge took place virtually.

NACD member companies have looked to increase their online security and cybersecurity training for their employees. This is an increasing concern across businesses. The PwC survey found that nearly one in five CEOs (19 percent) are concerned about cybersecurity risks, more than three times what respondents expressed in the April survey (six percent).

Technology will play an increasingly important role in business moving forward. Nearly one-third of CFOs (32 percent) are looking to tech-driven products and services to drive future growth.

Rodriguez says that targeted investments in technology during this COVID period are well-advised, where the budget for it can be found; in particular, investments in re-platforming and/or automation are no-regret decisions.

"Efforts that enhance user/customer experience, simplify processes to improve efficiency, open up operating model optionality for the business (e-commerce), or rationalize old, ineffective, and expensive technical debt are top of the list. Regardless of whether a company chooses one or all of these, thoughtful planning can drive sustainable advantage when normal operations resume."

The survey highlights that 63 percent of CFOs plan changes to products and services, with 41 percent looking to alter pricing, among other revenue strategies.

In the chemical industry, the pandemic saw a peak in demand for some products and a huge drop in volumes for others. Distributors handling chemicals helping to combat the impact of COVID-19 were kept busy, whereas others saw their markets slip away.

Going forward, Rodriguez says that chemical distributors with significant exposure to just one or two sectors will want to first consider the range of potential scenarios. "Highly concentrated and/or wide ranges of potential outcomes would suggest a serious look at diversification. Where and how that occurs will require a review of the company strategy."

The survey found that the virus is still setting the pace for growth plans and risk outlooks. The

financial impacts of COVID-19, including on liquidity and capital resources, remain a top concern for 42 percent of CFOs. However, this is down from 75 percent in April.

Rodriguez says companies should be mitigating liquidity and cash flow problems using four primary levers:

- **Continue enhancement of cash forecasting processes with focus on standardization and automation.**
- **Continue to determine and deploy sustainable working capital solutions across procure to pay, order to cash, and inventory.**
- **Deploy cash and working capital analytics, reporting, and dashboards to assist in decision making.**
- **Explore and adopt additional funding alternatives such as supply chain financing solutions.**

Some 88 percent of survey respondents were from public and private companies. Health industries accounted for nine percent, consumer markets 13 percent, financial services 23 percent, industrial products 23 percent, and technology, media, and telecommunications 20 percent.

Looking at the manufacturing sector specifically, PwC said the latest survey results highlighted that "while U.S. manufacturing CFOs are still steering organizations in rough waters, they appear to be in a stabilization phase, planning for a recovery and implementing back-to-work policies and strategies." Sixty five percent of manufacturing CFOs said they were planning to cancel or defer planned investments, compared to 73 percent who felt this way in the previous survey.

PwC says that difficult decisions made during the pandemic may actually lead to a stronger and more agile business within the manufacturing sector. Sixty four percent said that workforce flexibility policies (changing work schedule and locations) will be a positive in the long term, and 81 percent agreed that it improved their organization's resiliency and agility. This is compared with 72 percent of cross-industry CFOs.

One-third of the U.S. CFOs surveyed expect it will take more than six months to get back to "business as usual". When the survey was launched in March, that figure was much lower at just two percent. Whenever "normality" returns, PwC points out that the competitive landscape will look different. ■

their situation – supply, demand, regulation – and use scenarios to map a path forward. There will be some 'no-regrets' moves and a series of moves that only work in one or two scenarios."

"In these circumstances, agility is going to be key. Creating flexibility in the value chain will help companies respond quickly as changes occur. To create this agility requires a host of changes from contracting, to digital capabilities, to processes, and ultimately culture."

The pandemic has seen tech come to the forefront in terms of how businesses communicate internally. Within the chemical distribution industry, Zoom and similar platforms enabled face-to-face meetings to take place between home and onsite workers, and internal audits to be undertaken at chemical distribution sites when travel

PWC CFO SURVEY KEY FINDINGS (FROM JUNE 15, 2020)

■ Multiple paths to grow top line

63 percent of CFOs plan changes to products and services; 41 percent look to alter pricing, among other revenue strategies.

■ Growth drives tech investments

As they reinvent their businesses, nearly one-third of CFOs (32 percent) look to tech-driven

products and services.

■ Potential for second wave of outbreak looms

59 percent of CFOs worry about a rise in COVID-19 infections affecting returns to work.

■ Remote work ready for a new world

No longer viewed as a productivity drain, 54

percent of CFOs plan to make remote work a permanent option.

■ Confidence in a safe return

CFOs are very confident their company can both provide a safe working environment (71 percent) and meet customers' safety expectations (80 percent).



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NACD Members can now purchase cyber liability insurance as part of their Environmental and General Liability Exposures (EAGLE) Program to:

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Coverage provides payment for and access to a trusted panel of vendors to help with:

- Notifications, public relations and other services to assist in managing and mitigating a cyber incident
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NACD welcomes the following companies as members and Affiliates

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3818 North Stratford Rd., NE
Atlanta, GA 30342

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Recruitment goes virtual

Distributors continue with their efforts to hire new people, but coronavirus has changed the mechanics of recruiting, with companies having to shun personal contact and proceed in a virtual world

Elaine Burrige London

This year has been one of transition as people around the world adapt to living and working during a pandemic. The coronavirus health crisis has accelerated the use of digital and virtual tools, which has transformed not only our personal lives but our work lives too.

Recruitment is no exception. And while the need to recruit quality candidates has not changed as a result of the COVID-19 pandemic, the mechanics of the recruitment process have, says Heather Gombos, vice president, business operations at MicroCare. The company, based in New Britain, Connecticut, provides cleaning products for various industries, including electronics, medical devices, aerospace, telecommunications, among many others.

The primary changes to hiring center on interviewing, as social distancing rules mean that

companies have turned to virtual tools, such as Zoom or Teams to conduct interviews, or even in some cases, resorting to the "old-fashioned" use of the telephone.

The downside of using online platforms, perhaps, is it is more difficult for the interviewer and the interviewee to build a true rapport when talking via a screen. On the other hand, it can show how confident a candidate is on using virtual tools. This can be particularly important for companies that have locations around the world where the ability to connect online with people in other countries will be useful, if not essential.

About 90 percent of MicroCare's recruitment process is now done virtually, although Gombos says the company has started bringing candidates in for interviews on a limited basis at its Connecticut site because of the state's relatively low coronavirus transmission rate.

Maryland Chemical also performs its first interviews via Zoom. Then – in the case of a recent new hire for a warehouse manager – it performed second and third interviews in person, onsite – either outside or masked in a large conference room with the windows open and good cross ventilation.

RECRUITMENT CONTINUES

Distributors are continuing to recruit, despite the restrictions imposed to deal with COVID-19. Approaches are a mix of retaining agencies, using online services such as LinkedIn, Indeed, or Zip Recruiter, government websites, local job boards, and job fairs.

MicroCare also runs an employee referral program and, says Gombos, has recently begun to offer relocation assistance, which she says has opened up a pool of talent outside its immediate area.



"People are looking for a job that is safe, flexible, and that is going to give them the opportunity to grow"

Beth Campbell

Human resources manager, Maroon Group



"We definitely struggle with identifying pools of candidates that fit our needs on technical positions"

Heather Gombos

Vice president, business operations, MicroCare

Maroon Group, a specialty chemicals and ingredients distributor based in Avon, Ohio, currently has several positions open. "It is an interesting time to recruit – both challenging and rewarding," says Maroon's human resources manager Beth Campbell.

The company is working on building its presence in some new vertical markets in the U.S. and Canada and is hiring to put the infrastructure in place. Vacancies are open at various levels on both the commercial and support sides of the business.

Campbell says Maroon is making improvements in its hiring and onboarding processes to make them more virtual as well as a much more positive experience for candidates. Indeed, the role of human resources manager – Campbell joined in July 2020 – is new for the distributor, which relied significantly on recruiting agencies beforehand.

She notes that there is a large pool of candidates at the moment, partly due to the COVID-19 crisis that has prompted an economic downturn and job losses, but also because there are a lot of people looking to change their jobs too. "People are looking for a job that is safe, flexible, and that is going to give them the opportunity to grow. We offer all of that and more."

Certainly, for Judy O'Dell, human resources manager at Kansas City-based Harcros Chemicals, the company has had no problems recruiting applicants and has made new hires every month since the start of the outbreak. On average, Harcros recruits between 30 and 40 new employees every year.

TECHNICAL CHALLENGES

That said, hiring specialist or technical staff is more of a challenge. Chemical distribution is a specialized industry, and often finding the right

RECRUITMENT TIPS

- Find a recruiter, or one of your existing business advisors, who really knows you, your company, and culture to go through the resumes and screen for promising candidates.
- Be open to new ways to accomplish the work – it may create a larger pool of promising candidates.
- Use a team approach to onboarding so the new hire gets to know their team members across departments.
- Prepare a welcome kit with pandemic supplies (digital thermometer, masks, hand sanitizer, etc).
- Ask your new hire what they would like to learn about to grow their competency in their new role.
- In the first two weeks, pick up carry-out lunch and, pandemic-style and appropriately distanced, find out how things are going.



REX/Shutterstock

COVID-19 has introduced some new hurdles and opportunities when it comes to recruiting

mix of skills can be difficult and takes longer to fill than more generic roles. This is an area where distributors make more use of recruitment agencies to assist in their search.

"We definitely struggle with identifying pools of candidates that fit our needs on technical positions," says MicroCare's Gombos. As well as the requisite technical capabilities, there is also a need for strong communication skills to enable interaction with sales support staff and customers, she explains.

Often, technical specialists just want to focus on the technologies and chemistries involved in the job, and communicating outside the lab is not something they are interested in, says Gombos. She adds that there are times the group needs a "hybrid individual" that can wear different hats, which takes longer to find.

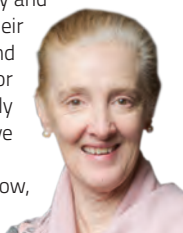
MicroCare has taken on a full-time talent acquisition person and that has helped to speed up the recruitment process. In addition, the company has developed a very defined recruitment process and Gombos says it takes care to stick to that, pointing out that the cost of a bad hire, both in terms of financial cost as well as the cost to the team in terms of effort, are significant.

Having gone through a large growth spurt and a flurry of hiring in 2017-2018, recruitment at MicroCare has since slowed. The company usually recruits about 10 people on average each year.

POSITIVE IMPACT

The COVID-19 effect actually appears to have had a silver lining, certainly in relation to recruitment. Distributors say using virtual tools and offering the ability to work remotely and flexibly has broadened their pool of candidates and opened opportunities for people for whom a daily commute would not have worked previously.

Jeanette Glose Partlow,
president of Maryland



"This is expanding our thinking about where some of our team members can be located and serve our customers successfully"

Jeanette Glose Partlow
President, Maryland Chemical

Chemical, says the company transitioned to rotating work from home for office and sales team members in the spring. As a result, they have created remote work capabilities they did not have before, so there are now more options, she says. "This is expanding our thinking about where some of our team members can be located and serve our customers successfully."

The onboarding process has also had to adapt in the face of the COVID-19 pandemic, and this has now become less "personal". Gone are the days – for now – of meetings and lunches with new team members on and off site, with virtual tools now providing much of the necessary support and training, although COVID-19 controlled visits to the workplace at the beginning of the hire are still practiced.

Companies' key advice going forward is to be creative and remain flexible, both in the recruitment process and after bringing a new hire on board. COVID-19 has brought change, and that can be a good thing, spurring people to take a new perspective on how they source and vet candidates as well as offering different work arrangements, opening up a new pool of talent. ■

Breaking the glass ceiling

While a truly diverse industry is still a work in progress, there are many female-led chemical distributors taking the sector a step closer to narrowing the gender gap

Yana Palagacheva Sofia, Bulgaria

A century ago, women of the U.S. were given the right to vote in a historic move paving the way toward gender equality in the country. Now, 100 years after the 19th Amendment to the U.S. Constitution, a lot has changed for women in business. However, achieving true equality and diversity in the workplace is an ongoing process in many industries – and the petrochemical sector is no exception.

A report published by KPMG in July this year suggests the chemical industry remains a laggard in respect to gender and ethnic diversity.

"You can count the number of female chemical company CEOs on one hand and when you look at ethnic diversity, the numbers aren't any better," according to the consultancy.

"Despite recent efforts, much more needs to be done to attract more women and Black, Asian, and Minority Ethnic (BAME) candidates into chemical engineering at the graduate level," it adds.

There are, however, many inspiring examples of female-led and owned U.S. petrochemical businesses that are moving the industry a step closer to gender diversity.

SUCCESS STORIES

TRIInternational's CEO Megan Gluth-Bohan is one such example, having led the business since 2018 after serving as the company's general counsel and later, its president. Today, Gluth-Bohan is also TRI's majority owner, as well as a member of the NACD Board of Directors. She has also served on various NACD committees over the past several years.

While acknowledging her achievements, Gluth-Bohan stresses they are all a result of great effort over the years.

"Any rise to the top of a business is challenging. Being in the 'top spot' is earned. Period. It is a place of the highest responsibility, and therefore, there are no shortcuts around hard work," she says.

Gluth-Bohan has a background in law, having practiced as an attorney before entering the petrochemical industry. While she initially did not imagine her career progressing in the field of chemical distribution, she gradually became rather fond of it.

"Once I became immersed in the industry, I loved it. There are very few industries which touch so much of our lives. I find our business to be challenging, exciting, and even fun," she admits.

Gluth-Bohan was not discouraged by the fact the field is male-dominated. "I can't say the world of business law was full of women either," she jokes.

Jensen-Souders is another female-led business with Katie Pogue becoming the company's president in 2018, after serving two years as vice president in charge of sales and operations. Pogue has been familiar with the chemical industry since her childhood, with her grandfather starting Jensen-Souders and her father later taking over the leadership.

Despite the business being her family's legacy, Pogue's experience at the top of the company has had its hurdles.

"The biggest challenge I have faced is trusting myself to make the right decisions when dealing with employees and customers. I have learned the hard way that it's very important to listen to your team, but more important to trust your instincts," she says.

Just like TRIInternational's Gluth-Bohan, she notes the scarcity of women in the field.

"It didn't bother me that the industry was primarily men. The only downside so



"I think the first step is recognizing where you are and setting diversity and inclusion goals for your company"

Katie Pogue
President, Jensen-Souders



Things are changing for the better with more women taking the top jobs

far was the female restroom lights turning off on me due to lack of activity at a ChemEdge meeting in 2012," she says.

Liana Roberts of Cal-Chem, meanwhile, also took over the business from her father when she bought him out in 1990, becoming sole owner and president of the company.

Being the daughter of the owner and a woman in an even more male-dominant industry back in the 1990s made it extra challenging for Roberts to establish herself as a leader in the field.

"I was the only woman in the business at the time and had several hurdles to overcome. I was the first female president of the Coating Society and the Coatings Council. The first few years in this business were very difficult as an only woman in the industry in Detroit," she says.

While the qualities of a successful leader, and the hurdles on the way to the top, do not in theory differ substantially based on gender, there are certain challenges that women in business are



more likely to face. One such difficulty is keeping the balance between steady career growth and raising a family.

"I believe that my biggest challenge has been the dance of integrating my roles as a business and industry leader, with that of my role as a mother. I have faced challenges that my male counterparts simply have not," says Gluth-Bohan.

Pogue also stresses the importance of that balance, saying she took a two-year career break to start a family before returning to the industry in 2012.

MAKING A CHANGE

While female-led chemical businesses still make up only a small percentage of the industry both in the U.S. and globally, Pogue certainly sees positive developments in the area.

"I believe we've made a lot of progress," she insists. "With NACD being comprised of many small businesses, we probably have an opportunity to change quicker than most, so I hope to see the trend continue."

Gluth-Bohan also stresses NACD's role in intro-

ducing female mentors who help and inspire other women looking to develop their careers in the field.

"I believe NACD has demonstrated tremendous leadership in the past several years in this regard. They often host workshops and breakout groups for women in the industry."

"There are so many companies and organizations which devote themselves to advancing the role of women, but there is nothing that will replace the mentorship and friendship of a woman who has been in your shoes," Gluth-Bohan adds.

Leaders have a responsibility and ability to boost diversity in their company, thereby improving the overall sector ratio.

"I think the first step is recognizing where you are



"Any rise to the top of a business is challenging. Being in the 'top spot' is earned. Period."

Megan Gluth-Bohan
CEO, TRInternational

and setting diversity and inclusion goals for your company. As an example, in our company today, 30 percent of the workforce is female and 75 percent come from diverse backgrounds," says Pogue.

While admitting that there has been progress in the field, Roberts stresses that more industry-wide efforts are needed to narrow the gender gap further, particularly on the top floors of businesses.

IMPORTANCE OF DIVERSITY

While the petrochemical industry is still behind in diversifying its leaders and employees, the consensus is that improving the overall ratio is the only way forward. Chemical companies are likely to start drawing talent from a much greater pool than before, potentially competing with the technology sector to obtain digitally proficient candidates, according to KPMG's report.

"More diverse candidates across gender, ethnicity, orientation, and skills, will be the path to greater profitability in the future," it says.

Encouraging young people of all backgrounds to pursue careers in STEM [science, technology, engineering and mathematics] is an important step that will help recruiters in the future. Data published by the Unesco Institute for Statistics (UIS) in June 2019 shows female researchers accounted for less than 30 percent of the global total.

Promoting diversity and inclusion creates a more appealing workplace and helps attract and retain better talent, while also making it easier to connect on a personal level with a larger pool of potential clients and partners.

"Studies have shown that companies with diversity of thought and opinion make better decisions," says Pogue. "How can we expect to be successful if the diversity of our company doesn't reflect the diversity of our customers or the communities that we serve?"

She also points out the importance of drawing from a wide pool of employees in terms of education as well.

"Not many of our employees had the opportunity or means to go to college, but because of their hard work they are able to have a salary that in most cases would be comparable to what they would make with a college degree," she says.

Diversity tends to improve work culture and help teams come up with alternative solutions and innovative decisions.

"Every business is at its best when there are a diverse set of people and viewpoints in our midst. I believe that diversity pushes ingenuity and creativity. On a personal level, I feel that each day at my company as I work alongside people who are different from me," says Gluth-Bohan.

"When we allow ourselves to be influenced by those who have not traditionally been in positions of leadership, we can be amazed at the growth that results from learning new perspectives." ■

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Masks and respirators are an essential part of a distributor's safety equipment

Breathe easy

Facemasks have become commonplace in both our personal and professional lives – and they have a vital role to play

Michael Lang NACD

During the COVID-19 outbreak, more attention has been directed at methods to safe-guard ourselves and our families, co-workers, and the public at large. Facemasks of all types, and effectiveness, have become a key part of our everyday lives.

Did you know that more than three million employees in the U.S., in approximately 1.3 million workplaces, are required to wear respiratory protection? Of course, respirators should only be used as a "last line of defense" in the Hierarchy of Controls when engineering and administrative controls are not feasible or are in the process of being implemented.

Hopefully, we can use this challenging time as an opportunity to learn more about more-advanced respirators and protecting our workforce.

Respirators protect the user in two basic ways. Air-purifying respirators (APRs) remove contami-

"Facemasks of all types, and effectiveness, have become a key part of our everyday lives"

Mike Lang

Vice president, Responsible Distribution, NACD

nants from the air. APRs include "particulate respirators", which filter out airborne particles, and "gas masks," which filter out chemicals and gases. Other respirators protect by supplying clean respirable air from another source. Air-Supplying Respirators (ASRs) fall into this category. They include airline respirators, which use compressed air from a remote source, and self-contained breathing apparatus (SCBA), which has its own air supply.

The classification of particulate respirators can be further subdivided into three categories:

1. Particulate filtering facepiece respirators. We see and hear about these on a daily basis whenever we go into the grocery store or somewhere the public congregates. After use, these should be discarded because of hygiene, excessive resistance, or physical damage. These are also commonly referred to as N95s since they are a respirator class that removes at least 95% of airborne particles during "worst case" testing using a "most-penetrating" sized particle during National Institute for Occupational Safety and Health (NIOSH) testing.

2. Elastomeric respirators. These are reusable as the facepiece can be cleaned. However, the filter cartridges must be replaced when they become

unsuitable for further use.

3. Powered air-purifying respirators (PAPRs). A battery-powered blower that moves the airflow through its filters.

A respirator fit test should be performed to verify a respirator is comfortable and correctly fits the employee. There are two fit test methods. A qualitative fit test is a pass/fail test that relies on the individual's sensory detection of a test agent, such as taste, smell, or involuntary cough – as an example of a reaction to irritant smoke. The second method, a quantitative fit test, is to use an instrument to numerically measure the respirator's effectiveness.

Respirators must form a seal around the wearer's face, covering at least the nose and mouth to provide the expected level of protection for workplace hazards. Employers should know that whenever a different size, type, model, or make of a respirator is used, a new fit test needs to be performed. Equally important are facial changes of the wearer such as scarring, weight gain or loss, or dental work.

Although OSHA mandates fit testing at least on an annual basis, it does not require a certification of the fit test process. Employers need to be aware and train employees on how to conduct a test, recognize and understand invalid tests, and of course, how to properly clean and maintain the equipment.

A fit test ensures employees are wearing the right protection and that they are wearing a correctly fitted model respirator. Higher-than-expected levels of exposure to a contaminant may occur if the respirator has a poor face seal against the user's skin, which can result in leakage.

Although Responsible Distribution does not specifically call out respirators and fit-testing, verifiers would probably look for evidence of conformance in those members' Code IV, Handling and Storage and/or Code V, Job Procedures and Training.

This article is only a brief summary on respirators and fit testing, so to find out more, visit the websites for the Centers for Disease Control and Prevention, OSHA, the respirator manufacturers, and other appropriate sources. ■

Don't miss NACD's two-part webinar series sponsored by Hawkins, Inc., "Respiratory Protection – Regulations, Limitations, and Liabilities", presented by Pete Downing, president of Environment & Safety Solutions on November 5 and 19.



NACD verified and PAC



THANKS TO OUR PAC CONTRIBUTORS

The following individuals recently contributed to the Responsible Distribution PAC. Thanks for your support!

Ellen Murphy
Walsh & Associates, Inc.
Matthew Rowe
Covalent Chemical LLC
Michael Poleselli
Vivion, Inc.
Robert Moser
Brenntag AG

Craig Lundell
Sea-Land Chemical Co.
Roselle Foley
NACD
Edward Boss
Riteks, Inc.
Jason Scott
TRiiSO

*As of September 30, 2020



In the third quarter of 2020, NACD is pleased to announce the following members have passed the 7th cycle (2020-2022) onsite Responsible Distribution verification.

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- Dar-Tech, Inc.
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Insight Onsite

Nadya Avanesova, Code Coordinator for all operational sections of Responsible Distribution and operations manager at Houghton Chemical, is preparing for her first verification



Jane Gibson London

Welcomed to NACD last year at the ChemEdge conference, Houghton Chemical's Nadya Avanesova admits that 2020 has been an interesting year to be starting in the role.

"I'm responsible for the operations side of Responsible Distribution. I work closely with the plants and support the different departments across the company. The COVID-19 situation has been very challenging. I can't believe we went through that, but we did."

"Keeping up with Code VIII, Security, was hard," says Avanesova. "Implementing the new security measures fell under this and, at first, there was no guidance from the government. We were carrying out training daily. The company even made its own hand sanitizer out of the Boston facility for the staff and distributed it to hospitals and first responders."

Avanesova found the travel restrictions were the greatest challenge, making it harder to audit Houghton's facilities. The company had a no-visitors policy, which meant all the vendors could only be reached over the phone.

Within Houghton, talking to the staff regularly at the different plants has helped to keep Responsible Distribution on track this year. "I'd call every plant every day and talk about the challenges they are facing, what went well, and what needed changing."

Avanesova believes focusing on other people's views is vital for a Code Coordinator.

"I like to put on my steel boots and work from their perspective – it helps to create trust and better communication."

"Having the relationships in place and having the ability to listen to people is the most important part of the role. You need to make people understand the importance of Responsible Dis-

tribution so that they also want to do everything safely and securely. I always want to convey to them how important this all is. That means that when there is an issue, they always come to you to tell you."

A good routine is key to keeping on top of everything, says Avanesova. "At the start of each day, I ask the workers on the operational side, 'What will you do today? What are your goals today? Do you have any other points that need addressing?'"

"Things tend to come at you as a Code Coordinator," she adds. "I have to have lots of reminders in my email calendar and a task list that I follow. I'll call the plant and then try to see how I can make something happen from my side."

The company is currently implementing its new software program, which will ensure all documentation will be in one place and is easily manageable. "The system will make my job easier. It is just me working as Code Coordinator, but this system will mean that someone else could take over, if necessary."

Although the company has yet to be verified for this cycle, Avanesova says Responsible Distribution ensures all the company's operations are carried out securely and that environmental protection measures are in place.

"We have implemented corrective actions and had fewer incidents, fewer missed shipments, and fewer errors in invoicing and paying bills. Responsible Distribution helps you communicate what you must do. Our employees know it is important. Make the people around you more aware. Communicate how things should be done."

"When people know that you want to help them, it turns things around. It brings a two-way connection, trust, one-goal. It becomes a pleasure working with one another. If you lis-

ten, you will be successful. There are so many different personalities and it is important to find common ground – and in a small company, it is very necessary."

Avanesova's Responsible Distribution training has partly taken place in both the real and virtual world. "Meeting people during ChemEdge in 2019 was helpful," she says. "When you talk to other people, you learn."

She is also taking part in the NACD Emerging Leaders program, with Zoom meetings used to introduce her to her peers at other NACD member companies.

"I am hoping to get a mentor in the Emerging Leaders program," says Avanesova. "I have people in the industry who I can call and ask questions. It could be a stupid question, but I will always get a reasonable answer." Avanesova can also rely on senior management commitment; her company's president is one of her mentors.

Avanesova's advice to new Code Coordinators is to stay on top of things and remember that the role is sometimes challenging and frustrating. "If you have questions, don't be afraid to ask. Remember, there is no need to reinvent the wheel. Stand your ground, but be nice to people. And don't be afraid to make a mistake – that is how you will learn." ■

NACD often highlights the efforts of its members and their positive contribution to the industry – and this is your chance to share your achievements, thoughts, and experiences. Each issue, this will be your forum. We want to hear about your experiences as a Code Coordinator. If you or one of your colleagues would like to be featured in the next edition of Chemical Distributor, please email **Matt McKinney at mmckinney@nacd.com**



CEF's *You Be The Chemist* programs are virtual this year!

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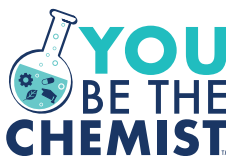
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Contact Dwayne Sattler, CEF Executive Director, at dsattler@chemed.org for more information.



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