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# **GLOBAL PAINT & COATINGS**

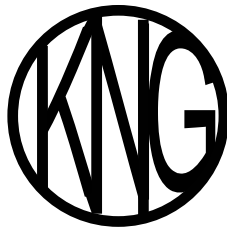
## **2013-2018**

**A Multiclient Study**

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**NOW AVAILABLE**

**February, 2014**



**KUSUMGAR, NERLFI & GROWNEY, INC.**

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## **A Mature Industry with Modest Growth Prospects**

Global coating consumption has rebounded since the world wide recession of 2008 and 2009. In 2013 coating usage was an estimated 80 billion pounds (36 MM metric tons) valued at \$120 billion. Growth of 5% per year is expected with most of it being driven by developing nations. Consumption in Asia-Pacific, particularly China and India, has surged and is up by about 50% in pounds from 2008.

The Asia-Pacific region is the leading coating consumer with 45% of the volume and 40% of the value in 2013. Growth is placed at 8%/yr and its share is projected to rise to 51% of the pounds and 46% of the dollars in 2018. China is 58% of the region's volume and India 13%.

Europe is the second largest coating outlet taking 24% of the volume and 28% of the value in 2013. A mature 2% annual rate is forecast with growth in Russia, Turkey and other Eastern European countries expanding faster. North America took 17% of the global poundage and 21% of the dollars. Like Europe growth is mature and a 1% annual rate is forecast through 2018.

South and Central American coating usage in 2013 represented 8% of the total coating poundage and 6% of global value. Here growth is expected to be 5% per year over the next five years. Increased coating usage in this region is being driven principally by a 6%/yr increase in Brazil, which accounted for two-thirds of the region's consumption by pounds in 2013

Regulations and consumer demands are fostering the growth of more environmentally acceptable coatings. As highlighted in Table 1, water-based (WB) technology leads in volume in 2013 with a 52% share of the pounds and is second in value with 40% of the dollars. Some 85% of the WB pounds were architectural paints where the technology continues to capture share from SB types. Solvent-based (SB) paints were 41% of the worldwide volume and 48% of the value in 2013. Industrial applications were 68% of the SB pounds and 80% of the dollars. Powder, radcure and other 100% solid liquid coatings are found in industrial applications and combined for 7% of the pounds and 12% of the value in 2013.

The top 25 suppliers of coatings combined for 54% of the sales in 2013 and the top 100 two-thirds. Akzo Nobel and PPG are the two largest suppliers and combined garnered 19% of the dollars. They captured 21% of the architectural paint sales and 18% of the industrial sales. The top 100 suppliers of architectural paints held three-quarters of the sales in 2013 and the top 100 suppliers of industrial coatings 65%.

<b>Table 1</b>					
<b>GLOBAL COATING CONSUMPTION BY TECHNOLOGY, IN BILLIONS</b>					
<b>Technology</b>	<b>2013</b>		<b>2018</b>		<b>AGR</b>
	<b>Lb</b>	<b>\$</b>	<b>Lb</b>	<b>\$</b>	
Water-Based	41.4	48.1	54.0	61.0	5
Solvent-Based	32.7	57.4	40.2	68.0	4
Powder	4.3	10.6	6.2	14.9	8
Radcure	0.7	3.0	1.0	4.1	7
Other 100% Solid Liquid	0.5	1.2	0.6	1.5	5
<b>Total</b>	<b>80</b>	<b>120</b>	<b>102</b>	<b>150</b>	<b>5</b>

## **THE STUDY**

**GLOBAL PAINT & COATINGS, 2013-2018** characterizes coating consumption for base year 2013 and provides projections to the year 2018. The report gives a comprehensive analysis of global coating consumption by region, country, end use, technology and major polymer types. Growth rates, trends, recent developments, technologies, supplier structure and end uses are assessed. Separate sections of the report summarize end uses and coatings by polymer type.

An Executive Summary provides subscribers a concise, easy to read representation of the global coatings industry. The Business Analysis chapter summarizes consumption by region, end use, and technology and polymer type. It also includes the global coating industry supplier structure. A review of mergers and acquisitions is part of the Business Analysis. **GLOBAL PAINT & COATINGS, 2013-2018** accurately portrays the industry in the identified regions and countries, and provides critical insights into future developments.

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## OUR QUALIFICATIONS

Kusumgar, Nerlfi & Growney is a consulting firm specializing in market research and business analysis for the polymer and chemical industries. Members of the firm possess some 90 years of experience analyzing the coating, ink, and adhesive & sealant industries. Kusumgar, Nerlfi & Growney is dedicated to providing comprehensive and accurate information and insight on technology driven markets.

The information and analyses contained in **GLOBAL PAINT & COATINGS, 2013-2018** was developed by Michael Growney, Minesh Kusumgar and Steven Nerlfi. No outside contractors were employed. Our expertise has been gained from conducting over 40 multiclient and numerous proprietary studies.

## ADDITIONAL SERVICES

Kusumgar, Nerlfi & Growney's current multiclient project is **GLOBAL COATING & INK ADDITIVES, 2013-2018**. A recently completed study is **THE GLOBAL RADIATION-CURED PRODUCTS INDUSTRY, 2012-2017**. Interested parties are invited to contact Kusumgar, Nerlfi & Growney for brochures and additional information. Brochures can be obtained at [www.kusumgar-nerlfi-growney.com](http://www.kusumgar-nerlfi-growney.com). We welcome inquires for projects of a proprietary nature.

## SUBSCRIPTION INFORMATION

**GLOBAL PAINT & COATINGS, 2013-2018** is available through subscription. The price of the study is \$11,000. Subscribers will receive 5 electronic copies (PDF) of the report. Additional copies are available upon request of the subscriber for \$700. A corporate use license is available for \$1,500. To subscribe, please complete and sign the contract on the following page and return to Kusumgar, Nerlfi & Growney. For additional information please call Kusumgar, Nerlfi & Growney at 201-773-0785 (FAX: 201-773-8517) or e-mail us at [nerlfikng@cs.com](mailto:nerlfikng@cs.com).

# CONTRACT FOR GLOBAL PAINT & COATINGS, 2013-2018

**KUSUMGAR, NERLFI & GROWNEY, INC.**

**45 Willow Street  
Elmwood Park, NJ 07407  
Phone: 201-773-0785  
Fax: 201-773-8517**

Please initiate our participation in **GLOBAL PAINT & COATINGS, 2013-2018**. We understand our subscription entitles us to five electronic copies (PDF) of the final report.

We agree that for a period of three years from publication to:

1. Not reproduce the study, in whole or in part, by any means.
2. Restrict use of the study to our own employees.
3. Prevent the disclosure of its contents, to the best of our ability, to any other firm or person.

We understand that we may disclose the contents of this study to any firm that we own more than half of, or to a company that maintains more than a half interest in our firm. We may use or disclose any information in the study which is public knowledge, in our possession before receiving the report, or that has been obtained from third parties, but not from this study.

Kusumgar, Nerlfi & Growney will take reasonable precautions to prevent disclosure of the contents of this study, except to subscribers, for a period of three years after it is issued.

We understand the fee for **GLOBAL PAINT & COATINGS, 2013-2018** is \$11,000.

Kusumgar, Nerlfi & Growney will invoice us for the full amount upon acceptance of our participation, after a countersigned copy of this contract is returned to us for our records. We will pay this invoice within thirty days.

Accepted: Kusumgar, Nerlfi & Growney

Subscriber:

Signature

Signature

Name

Name

Title

Title

Date

Date

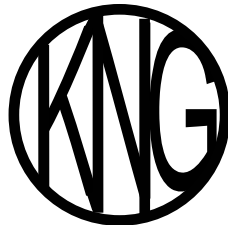
# **POLYMER AND CHEMICAL BUSINESS ANALYSIS AND MARKET RESEARCH**

## **ADDITIONAL SERVICES**

**GLOBAL PAINT & COATINGS, 2013-2018** is Kusumgar, Nerlfi & Growney's twenty second multiclient study. Studies immediately available, or scheduled for completion, include:

- **GLOBAL COATING & INK ADDITIVES**, March 2010
- **THE GLOBAL ADHESIVES INDUSTRY**, September, 2010
- **THE U.S. PAINT & COATINGS INDUSTRY**, March 2012
- **THE GLOBAL SEALANTS INDUSTRY**, October 2012
- **THE GLOBAL RADIATION-CURED PRODUCTS INDUSTRY**, May 2013
- **GLOBAL COATING & INK ADDITIVES, 2013-2018**, due mid 2014

Interested parties should contact Kusumgar, Nerlfi & Growney for subscription information. We also welcome inquires for projects of a proprietary nature.



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