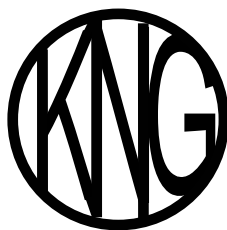

GLOBAL COATING & INK ADDITIVES, 2017-2022

**Dispersants
Foam Control
Rheology Modifiers
Slip/Rub
Wetting Agents**

A Multiclient Study

NOW AVAILABLE

July, 2018



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Optimized Properties from Small Amounts

Resins, pigment and fillers, and water and solvent comprise over 95% of the ingredients employed in coatings and inks. However, it is the small volume additives that maximize the manufacture process, stability, appearance, performance and application properties of a formulation. Global consumption of the five leading additive types covered in this study was 2.53 billion pounds (as supplied) worth \$5.12 billion. There are some 25 broad chemical classifications and thousands of individual product types used for the myriad of coating and ink formulations.

As shown in Table 1, rheology modifiers were the largest additive type in this study with 41% of the pounds and 38% of the dollars in 2017. These materials improve product storage stability and enhance application properties. They range from cellulosic and WB synthetic products which are largely used in architectural paints to fumed silicas, organoclays and other synthetic products which are primarily employed in industrial coatings.

Dispersants were second in volume and value with one-fifth of the pounds and 18% of the dollars in 2017. Dispersants separate pigment and filler particles in a coating and ink which improves color strength, settling, flow and leveling and other properties. The largest volume dispersant is polyacrylic acid & polycarboxylate types which are primarily used to disperse TiO₂ and fillers in WB architectural paints. However, the broadly classified polymeric dispersants, primarily used to disperse organic and inorganic coloring pigments in coatings and inks, were most of the dispersant dollars.

Foam control additives took 15% of the 2017 additive weight and value. Foam control additives are classified as oil, surfactant, and polymer types or as silicone products. The bulk of the oil/surfactant/polymer category is oil-based with mineral oil the leading type; some vegetable oil based products are also used. Surfactant and polymer based foam control additives are more specialized products.

Slip and rub additives were 12% of the pounds and 15% of the dollars in 2017. These additives improve the abrasion resistance, slip properties, blocking and release properties of a coating or ink. They are divided into wax products and silicones. Wetting agents were 12% of the additive pounds and 15% of the dollars in 2017. Wetting agents provide pigment and substrate wetting, and can improve flow and leveling of a coating or ink. Alkoxylated surfactants, silicones, acrylics and acetylenic glycol derivatives are the leading wetting agents.

Table 1					
ADDITIVE CONSUMPTION BY TYPE, IN MILLIONS					
Type	2017		2022		AGR
	LB	\$	LB	\$	
Rheology	1038.4	1936.7	1247.7	2276.3	4
Dispersant	506.2	907.0	627.1	1107.5	4
Slip/Rub	313.4	792.5	364.3	913.6	3
Foam Control	367.8	751.3	459.3	901.0	5
Wetting Agents	299.6	732.3	385.1	924.8	5
Total	2525.4	5119.8	3083.5	6123.2	4

THE STUDY

GLOBAL COATING & INK ADDITIVES, 2017-2022 characterizes consumption for base year 2017 and provides projections to the year 2022. The report gives a comprehensive analysis of global coating and ink additive consumption by region, industry, and technology. Growth rates, trends, recent developments, supplier structure, applications, and end users are assessed. Coating and ink consumption by region and end use is provided. The supplier structure of coating and ink products is provided.

An Executive Summary provides subscribers a concise, easy to read representation of the coating and ink additive industry. The Business Analysis summarizes consumption by industry and technology. The global coating and ink industries are analyzed in detail. A review of mergers and acquisitions is part of the Business Analysis. **GLOBAL COATING & INK ADDITIVES, 2017-2022** 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 analysis contained in **GLOBAL COATING & INK ADDITIVES, 2017-2022** 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

Our recently completed studies include **GLOBAL PAINT & COATINGS, 2016-2021** and **THE U.S. PAINT & COATINGS INDUSTRY, 2015-2020**. Interested parties are invited to contact Kusumgar, Nerlfi & Growney for brochures and additional information. Brochures can be obtained at www.kusumgar-nerlfi-growney.com. We welcome inquires for projects of a proprietary nature.

SUBSCRIPTION INFORMATION

GLOBAL COATING & INK ADDITIVES, 2017-2022 is available through subscription. The price of the study is \$12,000. Subscribers will receive 3 CD copies (PDF) of the report. Additional copies are available upon request of the subscriber for \$750. A corporate use license is available for an additional \$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.

**CONTRACT FOR GLOBAL COATING & INK ADDITIVES,
2017-2022**

**KUSUMGAR, NERLFI & GROWNEY, INC.
45 Willow Street
Elmwood Park, NJ 07407**

Please initiate our participation in **GLOBAL COATING & INK ADDITIVES, 2017-2022**. We understand our subscription entitles us to three CD 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 COATING & INK ADDITIVES, 2017-2022** is \$12,000.

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 COATING & INK ADDITIVES, 2017-2022 is Kusumgar, Nerlfi & Growney's twenty-seventh multiclient study. Studies immediately available include:

- **THE GLOBAL SEALANTS INDUSTRY**, October 2012
- **THE GLOBAL RADIATION-CURED PRODUCTS INDUSTRY**, May 2013
- **GLOBAL COATING & INK ADDITIVES, 2013-2018**, February 2014
- **THE GLOBAL ADHESIVES INDUSTRY, 2014-2019**, April 2015
- **THE U.S. PAINT & COATINGS INDUSTRY, 2015-2020**, June 2016
- **GLOBAL PAINT & COATINGS, 2016-2021**, July 2017

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