
GLOBAL PAINT & COATINGS

2019-2024

A Multiclient Study Prospectus

Kusumgar, Nerlfi & Growney is pleased to announce their newest technical and business multiclient market research study, **GLOBAL PAINT & COATINGS, 2019-2024**. This in-depth technical and economic analysis will provide subscribers with detailed information on coating consumption by region. Separate sections will summarize global coating consumption by end use and polymer type. Information on coating supplier structure by region will be provided.

This will be our fourth edition of the study. Our prior **GLOBAL PAINT & COATINGS** studies were published in 2009, 2014 and 2017. The new study compliments several of our recent published reports including **THE U.S. PAINT & COATINGS INDUSTRY** (2016), **GLOBAL COATING & INK ADDITIVES** (2018), and **THE GLOBAL ADHESIVES INDUSTRY** (2015).

The study will characterize coating consumption by region and end use for base year 2019, and provide projections for usage in 2024. Coating supplier structure, end use consumption patterns by region, and industry concentration via mergers and acquisitions will be evaluated.



KUSUMGAR, NERLFI & GROWNEY, INC.

45 Willow Street

Elmwood Park, NJ 07407

Phone: 201-773-0785

Fax: 201-773-8517

www.kusumgar-nerlfi-growney.com

MODEST GROWTH; CONTINUED TRANSITION TO SAFER PRODUCTS

Global coating growth is placed at a modest 4% annual rate over the next five years. In 2019 consumption is projected to exceed 100 billion pounds and achieve a value of some \$145 billion (dependant upon exchange rates and inflation). As highlighted in Table 1, the Asia-Pacific region will represent about one-half of the volume consumed in 2019. China represents about two-thirds of the consumption and has been the engine of growth for the region which has seen volume more than double over the last ten years. A more modest rate of growth is now forecast for the region following the explosive growth of the last two decades.

Europe and North America are more mature regions for coating growth representing 21% and 16% of the 2019 poundage, respectively. South and Central American countries are projected to take 6% of the global coating volume with Brazil the leading consumer. Political and economic uncertainties have been a leading factor in coating demand in the region in recent years.

More environmentally friendly coatings continue to capture global share. Water-based technology represents 56% of the 2019 coating volume, up from a 50% share ten years ago. The water-based share of architectural coatings is now 82%, up from 78% in 2009. Powder coatings share of the industrial coating market has risen from 11% in 2009 to 13% in 2019. Radiation-cured coatings are a small percentage of industrial coatings but are outperforming market growth, particularly in plastic and wood applications.

Table 1					
GLOBAL COATING CONSUMPTION, BILLION LB					
Region	2008	2009	2013	2016	2019 (est.)
Asia-Pacific	23.4	23.3	36.2	42.5	50.0
Europe	19.2	17.2	19.1	20.3	21.5
North America	13.9	12.3	13.7	15.4	16.5
South/Central America	4.7	4.4	6.1	5.8	6.2
Rest of World	1.6	1.5	4.7	6.4	7.2
TOTAL	62.6	58.7	79.8	90.4	101.4

THE STUDY

GLOBAL PAINT & COATINGS, 2019-2024 will characterize consumption in volume for 2019 and estimate usage in 2024. The report will provide a comprehensive analysis of world coating usage. An Executive Summary will give subscribers a concise, easy to read representation of individual region consumption and end use markets. A business analysis will be provided which summarizes coating technology, supplier structure, significant trends, and mergers and acquisitions. A separate section of the report will summarize coating consumption by end use. Additionally, a section summarizing coating **consumption by polymer** type will be included.

Subscribers will find **GLOBAL PAINT & COATINGS, 2019-2024** the definitive reference work. Current participants and those contemplating entry, will find the study essential in their planning process. Firms contemplating introducing new materials and technologies will find the study particularly attractive. The study will accurately portray coating consumption by region and provide critical insight into future developments.

METHODOLOGY

GLOBAL PAINT & COATINGS, 2019-2024 will be based on a limited number of interviews with formulators, raw material suppliers, end users, trade associations, and governmental agencies. Additionally, current literature, company web sites, government reports, etc. will be thoroughly reviewed and analyzed. Kusumgar, Nerlfi & Growney's extensive knowledge of the coatings industry, gained over the past four decades, insures an accurate and comprehensive report. Our prior Global Paint & Coatings studies provide us with a solid foundation to build upon.

COMPLETION

Kusumgar, Nerlfi & Growney will initiate research on **GLOBAL PAINT & COATINGS, 2019-2024** in the latter part of 2018. Completion of the study is expected in February of 2020. The final study will be approximately 700 pages in length.

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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, adhesive, and 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 PAINT & COATINGS, 2019-2024** will be developed by Michael Growney, Steven Nerlfi and Minesh Kusumgar. No outside contractors will be employed. Our expertise has been gained from conducting over 40 multicient and numerous proprietary studies.

ADDITIONAL SERVICES

Kusumgar, Nerlfi & Growney's recently completed studies include **GLOBAL COATING & INK ADDITIVES, 2017-2022, THE U.S. PAINT & COATINGS INDUSTRY, 2015-2020**, and **THE GLOBAL ADHESIVES INDUSTRY, 2014-2019**, and. 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 PAINT & COATINGS, 2019-2024 is available through subscription. Completion of the study is expected in February of 2020. The price of the study is \$8,000 to early subscribers (before January 2019) and \$9,500 for subscription thereafter and up to the publication date. After publication the price is \$11,000. Subscribers will receive three electronic copies of the report (PDF). Additional copies are available for \$700. A corporate use license can be purchased for \$1,500. To subscribe, please complete the contract on the following page and return to Kusumgar, Nerlfi & Growney. For additional information please contact Kusumgar, Nerlfi & Growney at 201-773-0785 or nerlfikng@cs.com. Information is also available at our web site: www.kusumgar-nerlfi-growney.com.

CONTRACT FOR GLOBAL PAINT & COATINGS, 2019-2024

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, 2019-2024**. We understand our subscription entitles us to three PDF copies 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, 2019-2024** is \$8,000 for subscription by January 31, 2019; \$9,500 afterwards and through completion; and \$11,000 after publication.

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

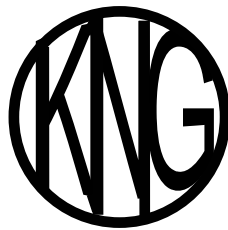
POLYMER AND CHEMICAL BUSINESS ANALYSIS AND MARKET RESEARCH

ADDITIONAL SERVICES

GLOBAL PAINT & COATINGS, 2019-2024 is Kusumgar, Nerlfi & Growney's twenty-eighth multi-client study. Studies immediately available, or scheduled for completion, include:

- **THE GLOBAL SEALANTS INDUSTRY**, October 2012
- **THE GLOBAL RADIATION-CURED PRODUCTS INDUSTRY**, May 2013
- **THE GLOBAL ADHESIVES INDUSTRY, 2014-2019**, April 2015
- **THE U.S. PAINT & COATINGS INDUSTRY, 2015-2020**, June 2016
- **GLOBAL COATING & INK ADDITIVES, 2017-2022**, July 2018

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