



Freedonia Focus Reports
Global Collection

Architectural Paint: United Kingdom

June 2018



CLICK TO ORDER
FULL REPORT

BROCHURE

CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Market Environment	4
Historical Trends	4
Key Economic Indicators	5
Environmental & Regulatory Factors	6
End User Overview	7
Western Europe Outlook	8
3. Segmentation & Forecasts	10
Formulations	10
Water-Based	11
Solvent-Based	12
Markets	14
Residential Remodel & Repaint	15
Nonresidential Construction	16
New Residential Construction	16
4. Industry Structure	18
Industry Characteristics	18
Market Leaders	19
Akzo Nobel	19
PPG Industries	20
Crown Paints (Hempel)	21
5. About This Report	22
Scope	22
Sources	22
Freedonia Methodology	23
Resources	25

List of Tables & Figures

Figure 1 UK: Key Trends in Architectural Paint Demand, 2017 – 2022	3
Figure 2 UK: Architectural Paint Demand Trends, 2007 – 2017	4
Table 1 UK: Key Indicators for Architectural Paint Demand, 2007 – 2022 (2016US\$ bil)	5
Figure 3 UK: Architectural Paint Demand by End User, 2017 (%)	7
Figure 4 Western Europe: Architectural Paint Demand by Country, 2017 (%)	9
Figure 5 UK: Architectural Paint Demand by Formulation, 2007 – 2022 (000 m tons)	10
Table 2 UK: Architectural Paint Demand by Formulation, 2007 – 2022 (000 m tons)	10
Table 3 UK: Architectural Paint Supply & Demand, 2007 – 2022 (000 m tons)	11
Table 4 Water-Based Architectural Paint: Advantages & Disadvantages by Application	12
Table 5 Solvent-Based Architectural Paint: Advantages & Disadvantages by Application	13
Figure 6 UK: Architectural Paint Demand by Formulation, 2007 – 2022 (%)	13
Figure 7 UK: Architectural Paint Demand by Market, 2007 – 2022 (000 m tons)	14
Table 6 UK: Architectural Paint Demand by Market, 2007 – 2022 (000 m tons)	14
Figure 8 UK: Architectural Paint Demand by Market, 2007 – 2022 (%)	17
Table 7 UK: Selected Suppliers to the Architectural Paint Market	19
Table 8 HS Codes Related to Architectural Paint	23

About This Report

Scope

This report forecasts to 2022 architectural paint demand and production in metric tons in the UK. Total demand is segmented by formulation in terms of:

- water-based
- solvent-based

Total demand is also segmented by market as follows:

- residential remodel and repaint
- nonresidential construction
- new residential construction

To illustrate historical trends, total demand is provided in annual series from 2007 to 2017; production and the various segments are reported at five-year intervals for 2007, 2012, and 2017.

For the purposes of this report, “architectural paint” refers to interior and exterior paint products used in building construction markets, including water- and solvent-based paint, primers, stains, and sealers. White washes and distempers, factory-applied coatings, industrial maintenance coatings, and products used to maintain infrastructure are excluded from the scope.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Architectural Paint: United Kingdom (FB35096) is based on [Global Architectural Paint](#), a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group

About This Report

- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 8 | HS Codes Related to Architectural Paint

HS Code	Definition
320810	Paints & varnishes (including enamels & lacquers) based on synthetic or other polymers, in a nonaqueous medium, based on polyesters
320820	Paints & varnishes (including enamels & lacquers) based on synthetic or other polymers, in a nonaqueous medium, based on acrylic or vinyl polymers
320890	Paints & varnishes (including enamels & lacquers) based on synthetic or other polymers, in a nonaqueous medium, nesoi
320910	Paints & varnishes (including enamels & lacquers) based on synthetic or other polymers, in an aqueous medium, based on acrylic or vinyl polymers
320990	Paints & varnishes (including enamels & lacquers) based on synthetic or other polymers, in an aqueous medium, nesoi
3210	Other paints & varnishes (including enamels, lacquers, & distempers); prepared water pigments of a kind used for finishing leather

Source: United Nations Statistics Division

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global

About This Report

data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

Resources

The Freedonia Group

Global Architectural Paint, June 2018

Freedonia Industry Studies

Siding Market in the US, January 2018

Liquid-Applied Roof Coatings in the US, November 2017

Wood Coatings Market in the US, March 2017

Architectural Paint Market in the US, February 2017

Paint & Coatings: US Market Forecasts, February 2017

Manufacturing (OEM) Coatings Market in the US, January 2017

Protective & Specialty Coatings Market in the US, December 2016

Global Emulsion Polymers Market, November 2016

Freedonia Focus Reports

Architectural Paint: United States

Global Housing

Liquid-Applied Roof Coatings: United States

Manufacturing (OEM) Coatings: United States

Paint & Coatings: United States

Pigments: United States

Protective & Specialty Coatings: United States

Wood Coatings: United States

World Paint & Coatings

Freedonia Custom Research

Trade Publications

Chemical & Engineering News

Chemical Week

Coatings World

European Coatings Journal

PCI (Paint & Coatings Industry)

Agencies & Associations

American Coatings Association

British Coatings Federation

NSF International

Painting & Decorating Association

UK Green Building Council

United Nations Statistics Division