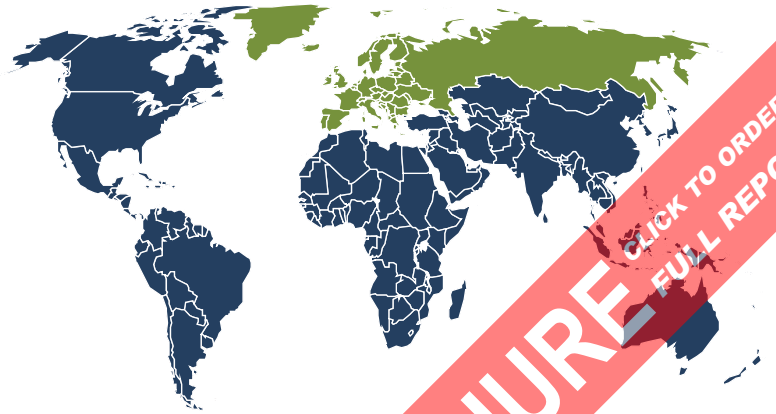




Freedonia Focus Reports
Global Collection

Paint & Coatings: Europe

March 2021



BROCHURE CLICK TO ORDER
FULL REPORT CLICK TO ORDER

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Market Environment	4
Historical Trends	4
Key Economic Indicators	6
Impact of COVID-19 Pandemic	7
Sustainability Initiatives	8
Demand by Country	11
3. Segmentation & Forecasts	12
Formulations	12
Water-Based	13
Solvent-Based	14
Powder Coatings & Other Formulations	15
Markets	17
Architectural	18
Manufacturing	19
Protective & Specialty	19
Supply & Demand	21
4. Industry Structure	23
Industry Characteristics	23
Market Share	24
AkzoNobel	25
PPG Industries	26
BASF	26
5. About This Report	28
Scope	28
Sources	29
Industry Codes	29
Freedonia Methodology	30
Resources	32

List of Tables & Figures

Figure 1 Europe: Key Trends in the Paint & Coatings Market, 2019 – 2024	3
Figure 2 Europe: Paint & Coatings Demand Trends, 2009 – 2019	4
Table 1 Europe: Key Indicators for Paint & Coatings Demand, 2009 – 2024 (2018US\$ bil)	6
Figure 3 Europe: Paint & Coatings Demand by Country, 2019 (%)	11
Figure 4 Europe: Paint & Coatings Demand by Formulation, 2009 – 2024 (mil m tons)	12
Table 2 Europe: Paint & Coatings Demand by Formulation, 2009 – 2024 (000 m tons)	12
Figure 5 Europe: Paint & Coatings Demand by Formulation, 2009 – 2024 (%)	16
Figure 6 Europe: Paint & Coatings Demand by Market, 2009 – 2024 (mil m tons)	17
Table 3 Europe: Paint & Coatings Demand by Market, 2009 – 2024 (000 m tons)	17
Figure 7 Europe: Paint & Coatings Demand by Market, 2009 – 2024 (%)	20
Table 4 Europe: Paint & Coatings Supply & Demand, 2009 – 2024 (000 m tons)	21
Figure 8 Europe: Paint & Coatings Market Share by Company, 2019 (%)	24
Table 5 Europe: Selected Suppliers to the Paint & Coatings Market	27
Table 6 Countries in Western Europe	28
Table 7 Countries in Eastern Europe	29
Table 8 NACE Codes Related to Paint & Coatings	29
Table 9 HS Codes Related to Paint & Coatings	30

About This Report

Scope

This report forecasts to 2024 paint and coatings demand and production in metric tons in Europe. Total demand is segmented by formulation in terms of:

- water-based
- solvent-based
- powder coatings and other, including radiation curable (radcure) coatings

Total demand is also segmented by market as follows:

- architectural
- manufacturing
- protective and specialty

To illustrate historical trends, total demand is provided in annual series from 2009 to 2019; production and the various segments are reported at five-year intervals for 2009, 2014, and 2019.

Excluded from the scope of this report are products such as:

- adhesives and sealants
- paint thinners
- plasters
- solvents

For the purposes of this report, Europe encompasses the following countries:

Andorra	Germany*	Italy*	Portugal
Austria	Gibraltar	Jersey	Saint Pierre and Miquelon
Belgium	Greece	Liechtenstein	San Marino
Channel Islands	Greenland	Luxembourg	Spain*
Denmark	Guernsey	Malta	Sweden
Faeroe Islands	Iceland	Monaco	Switzerland
Finland	Ireland	Netherlands*	United Kingdom*
France*	Isle of Man	Norway	Vatican City

*Major paint and coatings markets.

Source: The Freedonia Group

About This Report

Table 7 | Countries in Eastern Europe

Albania	Hungary	Romania
Belarus	Latvia	Russia*
Bosnia and Herzegovina	Lithuania	Serbia
Bulgaria	Macedonia	Slovakia
Croatia	Moldova	Slovenia
Czech Republic	Montenegro	Ukraine
Estonia	Poland*	

*Major paint and coatings markets.

Source: The Freedonia Group

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

Paint & Coatings: Europe (FE35065) is based on *Global Paint & Coatings*, 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, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- 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 | NACE Codes Related to Paint & Coatings

NACE Code	Definition
20.30	Manufacture of paints, varnishes and similar coatings, printing ink and mastics

Source: European Commission

About This Report

Table 9 | HS Codes Related to Paint & Coatings

HS Code	Definition
3208	Paints, varnishes; (enamels and lacquers) based on synthetic polymers or chemically modified natural polymers, dispersed or dissolved in a non-aqueous medium
3209	Paints and varnishes (including enamels and lacquers) based on synthetic or chemically modified natural polymers, dispersed or dissolved in an aqueous medium
3210	Paints and varnishes (including enamels, lacquers and distempers), excluding those of heading no. 3209, 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 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)

About This Report

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 Paint & Coatings

Freedonia Industry Studies

Construction Chemicals in the US

Global Adhesives & Sealants

Global Architectural Paint

Global Construction Chemicals

Global Housing

Global Lubricants

Global Major Household Appliances

Global Motor Vehicle Outlook 2020

Global Prefabricated Housing

Global Siding (Cladding)

Global Silicones

Liquid-Applied Roof Coatings

Prefabricated Housing

Siding

Silicones Market in the US

Freedonia Focus Reports

Adhesives & Sealants: United Kingdom

Architectural Paint: United Kingdom

Automotive Repair & Maintenance Services: United States

Corrosion Inhibitors: United States

COVID-19 Market Impact Analysis

Global Demographics

Global Light Vehicles

Global Macroeconomy

Global Medium- & Heavy-Duty Trucks & Buses

Industrial Rubber Products: United Kingdom

Motorcycles: Europe

Motor Vehicles: Europe

Pigments: United States

Polyurethane: United States

Rubber Processing Chemicals: Europe

Freedonia Custom Research

Trade Publications

Chemical & Engineering News

Chemical Week

Coatings World

European Coatings

ICIS Chemical Business

PCI (Paint & Coatings Industry)

Agencies & Associations

British Coatings Federation

European Council of Paint, Printing Ink and Artists' Colours Industry

Eurostat

German Paint Industry Association

International Monetary Fund

Organisation for Economic Co-operation and Development

United Nations

World Bank