



Freedonia Focus Reports
US Collection

Manufacturing (OEM) Coatings: United States

January 2017



Highlights

Market Environment

Historical Trends | Key Economic Indicators | Trade
Environmental and Regulatory Factors

Segmentation and Forecasts

Formulations | Markets | Shipments

Industry Structure

Industry Composition and Characteristics | Companies Cited

Resources

CLICK TO ORDER
FULL REPORT
BROCHURE
CLICK TO ORDER
FULL REPORT

ABOUT THIS REPORT

Scope & Method

This report forecasts US manufacturing (OEM – original equipment manufacturer) coatings demand and shipments in gallons to 2020. Total demand is also forecasted to 2020 in US dollars at the manufacturers' level. Total demand in gallons is segmented by formulation in terms of:

- water-based
- solvent-based
- powder coatings
- radiation curable.

For the purposes of this report, powder coating volumes are converted from pounds to gallons using a conversion factor of five pounds per gallon.

Total demand in gallons is also segmented by market as follows:

- motor vehicles
- furniture and fixtures
- packaging
- metal building components
- machinery
- other markets such as fabricated metal products, aerospace and other transport equipment, and appliances.

To illustrate historical trends, total demand in volume and value terms and total shipments in volume terms are provided in annual series from 2005 to 2015; the various segments are reported at five-year intervals for 2010 and 2015.

This report quantifies trends in various measures of growth. 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. 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.

Key macroeconomic indicators are also provided at five-year intervals with CAGRs for the years corresponding to other reported figures. 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

Manufacturing (OEM) Coatings: United States (FF35054) is based on [Manufacturing \(OEM\) Coatings Market in the US](#), a comprehensive industry study published by The Freedonia Group in January 2017. 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
- the findings of other industry 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

The topic of this report is related to the following industry codes:

| NAICS/SCIAN 2007 | | SIC | |
|---|---------------------------------|-------------------------|---|
| North American Industry Classification System | | Standard Industry Codes | |
| 325510 | Paint and Coating Manufacturing | 2851 | Paints, Varnishes, Lacquers, Enamels, and Allied Products |

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.

Table of Contents

| Section | Page |
|--|------|
| About This Report | i |
| Highlights | 1 |
| Market Environment | 2 |
| Historical Trends | 2 |
| Chart 1 US Manufacturing Coatings Demand Trends, 2005-2015 (mil gal) | 3 |
| Key Economic Indicators | 4 |
| Table 1 Key Indicators for US Manufacturing Coatings Demand; 2010, 2015, 2020 (2009US\$ bil) | 4 |
| Trade | 5 |
| Chart 2 US Manufacturing Coatings Trade; 2005, 2010, 2015, 2020 (mil gal) | 5 |
| Environmental & Regulatory Factors | 7 |
| Segmentation & Forecasts | 9 |
| Formulations | 9 |
| Chart 3 US Manufacturing Coatings Demand by Formulation; 2010, 2015, 2020 (mil gal) | 9 |
| Chart 4 US Manufacturing Coatings Demand; 2005-2015, 2020 (US\$ mil) | 10 |
| Water-Based | 10 |
| Solvent-Based | 11 |
| Powder Coatings | 11 |
| Radiation Curable | 12 |
| Chart 5 US Manufacturing Coatings Demand by Formulation Share; 2010, 2015, 2020 (%) | 13 |
| Markets | 14 |
| Chart 6 US Manufacturing Coatings Demand by Market; 2010, 2015, 2020 (mil gal) | 14 |
| Motor Vehicles | 14 |
| Furniture & Fixtures | 17 |
| Packaging | 19 |
| Metal Building Components | 20 |
| Machinery | 21 |
| Other Markets | 22 |
| Chart 7 US Manufacturing Coatings Demand by Market Share; 2010, 2015, 2020 (%) | 24 |
| Shipments | 25 |
| Chart 8 US Manufacturing Coatings Shipments; 2005-2015, 2020 (mil gal) | 25 |
| Industry Structure | 26 |
| Industry Composition & Characteristics | 26 |
| Chart 9 US Manufacturing Coatings Market Share by Supplier, 2015 | 26 |
| PPG Industries Inc. | 27 |
| The Valspar Corporation | 28 |
| The Sherwin-Williams Company | 28 |
| Akzo Nobel NV | 28 |
| Axalta Coating Systems Ltd. | 29 |
| Companies Cited | 30 |
| Resources | 31 |

To return here, click on any Freedonia logo or the Table of Contents link in report footers.
 PDF bookmarks are also available for navigation.

RESOURCES

The Freedonia Group

www.freedoniagroup.com

| | |
|---|-------------------------------------|
| <i>3492 Manufacturing (OEM) Coatings Market</i> , January 2017 | see study contents |
| Related Industry Studies | |
| <i>3496 Protective & Specialty Coatings Market</i> , January 2017 | see study contents |
| <i>3461 Global Emulsion Polymer Market</i> , November 2016 | see study contents |
| <i>3456 Wood Preservative Market in the US</i> , November 2016 | see study contents |
| <i>3429 Solvents</i> , July 2016 | see study contents |
| <i>3418 World Paint & Coatings</i> , June 2016 | see study contents |
| <i>3273 World Fiber Cement</i> , May 2015 | see study contents |
| <i>3257 Adhesives & Sealants</i> , February 2015 | see study contents |
| Related Focus Reports | |
| <i>Fabricated Metal Products: United States</i> | see report contents |
| <i>Furniture: United States</i> | see report contents |
| <i>Manufacturing: United States</i> | see report contents |
| <i>Motor Vehicles: United States</i> | see report contents |
| <i>Packaging: United States</i> | see report contents |
| <i>Protective & Specialty Coatings: United States</i> | see report contents |
| <i>Solvents: United States</i> | see report contents |
| <i>World Emulsion Polymers</i> | see report contents |
| Freedonia Custom Research | see capabilities |

Trade Publications

| | |
|--|--|
| <i>American Painting Contractor</i> | www.paintmag.com |
| <i>Chemical & Engineering News</i> | http://cen.acs.org |
| <i>Coatings World</i> | www.coatingsworld.com |
| <i>ICIS Chemical Business</i> | www.icis.com |
| <i>IHS Chemical Week</i> | www.chemweek.com |
| <i>Paint & Coatings Industry</i> | www.pcimag.com |

Agencies & Associations

| | |
|---|--|
| American Coatings Association | www.paint.org |
| California Air Resources Board | www.arb.ca.gov |
| Occupational Safety and Health Administration | www.osha.gov |
| United States Census Bureau | www.census.gov |
| United States Environmental Protection Agency | www.epa.gov |
| United States Green Building Council | www.usgbc.org |
| United States International Trade Commission | www.usitc.gov |

Environmental Impact. Please consider the environment before printing this report. Freedonia Focus Report collections feature environmentally friendly products distributed entirely via electronic channels.