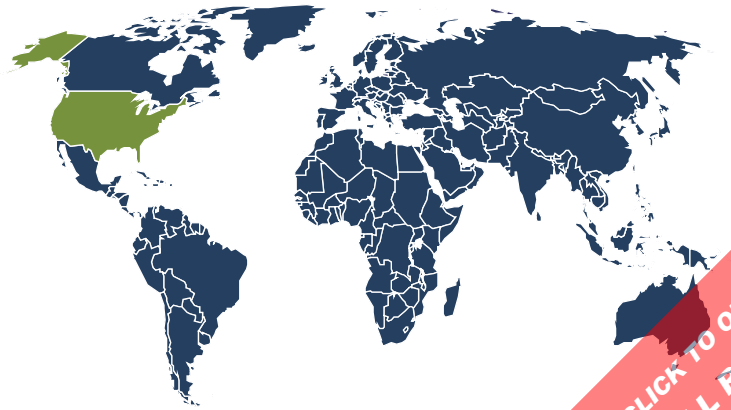




Freedonia Focus Reports
US Collection

Architectural Paint: United States

February 2017



Highlights

Market Environment

Historical Trends | Key Economic Indicators | Environmental and Regulatory Factors
End User Overview

Segmentation and Forecasts

Formulations | Markets

Industry Structure

Industry Characteristics | Market Share

Resources

www.freedoniafocusreports.com

CLICK TO ORDER
FULL REPORT
BROCHURE
CLICK TO ORDER
FULL REPORT

TABLE OF CONTENTS

1. Highlights	3
2. Market Environment	4
Historical Trends	4
Key Economic Indicators	5
Environmental & Regulatory Factors	6
End User Overview	8
3. Segmentation & Forecasts	10
Formulations	10
Water-Based	12
Solvent-Based	13
Markets	15
Residential Improvement & Repair	16
New Residential Construction	16
Nonresidential Construction	17
4. Industry Structure	19
Industry Characteristics	19
Market Share	21
The Sherwin-Williams Company	22
PPG Industries	23
Masco Corporation	23
The Valspar Corporation	23
5. About This Report	24
Scope & Method	24
Sources	24
Industry Codes	25
Resources	26

LIST OF TABLES & FIGURES

Figure 1 US Architectural Paint Demand Trends, 2005-2015	4
Table 1 Key Indicators for US Architectural Paint Demand; 2005-2015, 2020 (2009US\$ bil)	5
Figure 2 US Architectural Paint Demand by End User, 2015	8
Figure 3 US Architectural Paint Demand by Formulation; 2005, 2010, 2015, 2020 (mil gal)	10
Table 2 US Architectural Paint Demand by Product; 2005, 2010, 2015, 2020 (mil gal)	10
Figure 4 US Architectural Paint Supply & Demand; 2005-2015 (mil gal)	11
Table 3 US Architectural Paint Supply & Demand; 2005-2015, 2020 (mil gal)	11
Table 4 Water-Based Architectural Paint: Advantages & Disadvantages by Application	12
Table 5 Solvent-Based Architectural Paint: Advantages & Disadvantages by Application	13
Figure 5 US Architectural Paint Demand by Formulation Share; 2005, 2010, 2015, 2020 (%)	14
Figure 6 US Architectural Paint Demand by Market; 2005, 2010, 2015, 2020 (mil gal)	15
Table 6 US Architectural Paint Demand by Market; 2005, 2010, 2015, 2020 (mil gal)	15
Figure 7 US Architectural Paint Demand by Market Share; 2005, 2010, 2015, 2020 (%)	18
Figure 8 US Architectural Paint Market Share by Supplier, 2015	21
Table 7 Leading Suppliers to the US Architectural Paint Market by Key Brands	22
Table 8 Industry Codes Related to Architectural Paint	25

ABOUT THIS REPORT

Scope & Method

This report forecasts US architectural paint demand and shipments in gallons to 2020. Total demand is segmented by formulation in terms of:

- water-based
- solvent-based.

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 paints, primers, stains, and sealers. Factory-applied coatings, industrial maintenance coatings, and products used to maintain infrastructure are excluded.

Total demand is also segmented by market as follows:

- residential improvement and repair
- new residential
- nonresidential.

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

This report 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.

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 States (FF35096) is based on [Architectural Paint Market in the US](#), a comprehensive industry study published by The Freedonia Group. Reported findings

ABOUT THIS REPORT

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 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 | Industry Codes Related to Architectural Paint

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

Source: US Census Bureau

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

Architectural Paint Market in the US, February 2017

Freedonia Industry Studies

Paint & Coatings: US Market Forecasts, February 2017

Protective & Specialty Coatings Market, January 2017

Manufacturing (OEM) Coatings Market, January 2017

Global Emulsion Polymers Market, November 2016

Wood Preservative Market, November 2016

World Paint & Coatings, June 2016

Wood & Competitive Decking, May 2016

Freedonia Focus Reports

Construction: United States

Housing: United States

Nonresidential Building Construction: United States

Paint & Coatings: United States

Prefabricated Housing: United States

World Emulsion Polymers

Freedonia Custom Research

Trade Publications

Adhesives & Sealants Industry

American Painting Contractor

Chemical & Engineering News

Coatings World

ICIS Chemical Business

IHS Chemical Week

Paint & Coatings Industry

Agencies & Associations

American Coatings Association

California Air Resources Board

Lake Michigan Air Directors Consortium

NSF International

Simmons National Consumer Survey

South Coast Air Quality Management District

United States Census Bureau

United States Environmental Protection Agency

ABOUT THIS REPORT

United States Green Building Council
United States International Trade Commission