

[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table
& Chart 5](#)

[Sample Profile, Table &
Forecast 6](#)

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Automotive Coatings, Adhesives & Sealants

US Industry Study with Forecasts to **2010 & 2015**

Study #2031 | February 2006 | \$4200 | 306 pages

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Table of Contents

INTRODUCTION

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Macroeconomic Overview	5
Population Trends	7
Personal Consumption Spending	9
Motor Vehicle Industry Overview	11
Motor Vehicle Park	13
Motor Vehicle Production & Sales	14
Motor Vehicle Suppliers	17
Motor Vehicle Industry R&D Trends	20
Collision/Accident Trends	22
Competitive Technologies	22
Joining Technologies	23
Coating Technologies	25
Gasket Technologies	27
Historical Market Trends	29
Pricing Trends	31
Environmental/Regulatory Considerations	33
The Environmental Protection Agency... ..	33
The Occupational Safety and Health Administration	35
International Activity	36
World Motor Vehicle Overview	37
World Automotive Coatings, Adhesives & Sealants	38
Demand by Region	38
Demand by Market	40
Global Suppliers	42

OVERVIEW

General	45
Demand by Product	46

AUTOMOTIVE COATINGS

General	49
Demand by Formulation & Substrate	52
Solvent-Based	54
Water-Based	55
Other	58
Powder Coatings	58
Electrodeposition Coatings	59
Radiation-Cured Coatings	61
Demand by Polymer	62
Urethane	63
Acrylic	65
Epoxy	67
Alkyd	70

Other Polymers	72
Demand by Market & Application	74
OEM	76
Exterior OEM Applications	80
Other OEM Applications	84
OEM Light Vehicles	85
OEM Medium/Heavy-Duty Trucks & Buses	87
Aftermarket	88
Light Vehicle Aftermarket	91
Medium/Heavy Vehicle Aftermarket	92
Suppliers of Automotive Coatings	94
Suppliers of OEM Auto Coatings	97
Suppliers of Aftermarket Auto Coatings	99

AUTOMOTIVE ADHESIVES

General	104
Demand by Formulation	106
Solvent-Based	108
Water-Based	108
Other Formulations	109
Hot Melts	109
Radiation-Cured	110
Demand by Polymer	111
Acrylic	113
Urethane	115
Vinyl	117
Epoxy	119
Rubber	120
Other Adhesives	122
Demand by Market	124
OEM	126
Light Vehicles	129
Medium/Heavy Vehicles	132
Aftermarket	133
Light Vehicles	136
Medium/Heavy Vehicles	137
Suppliers of Automotive Adhesives	138
OEM Auto Adhesives Suppliers	141
Aftermarket Auto Adhesives Suppliers	142

AUTOMOTIVE SEALANTS

General	143
Demand by Formulation	145
Water-Based	147
Solvent-Based	148
Other Formulations	148
Demand by Polymer	149
Silicone	150
Urethane	152
Synthetic Elastomers	154

Bituminous	156
Other Polymers	158
Demand by Market & Application	160
OEM	162
Light Vehicles	165
Medium/Heavy Vehicles	166
Aftermarket	168
Light Vehicles	170
Medium/Heavy Vehicle Aftermarket	171
Suppliers of Automotive Sealants	172
Suppliers of OEM Automotive Sealants	175
Suppliers of Aftermarket Auto Sealants	178

APPLICATIONS

General	180
Exterior	182
Coating Applications	184
Adhesive & Sealant Applications	185
Under the Hood	187
Interior	189
Under Body	191

MARKETS

General	192
OEM Demand	194
OEM Light Vehicle Markets	197
OEM Passenger Cars	200
OEM Light Trucks & Vans	201
OEM Medium/Heavy Trucks & Buses	202
Aftermarket Demand	204
Light Vehicle Aftermarket	207
Medium/Heavy Trucks & Buses Aftermarket	208

INDUSTRY STRUCTURE

General	210
Market Share	211
Competitive Strategies	217
Acquisitions, Divestitures & Industry Restructuring	220
Joint Ventures & Other Cooperative Agreements	223
Marketing	224
Distribution	226
Manufacturing	228
Research & Development	229

COMPANY PROFILES

(see page 6)

List of Tables & Charts

EXECUTIVE SUMMARY

- 1 Summary Table3

MARKET ENVIRONMENT

- 1 Macroeconomic Indicators7
2 Resident Population
& Households9
3 Personal Consumption Expenditures ..11
4 Motor Vehicles & Parts Shipments12
5 Motor Vehicle Park14
6 Motor Vehicle Production & Sales16
7 Automotive Coatings, Adhesives &
Sealants Market, 1995-200530
Cht US Market, 1995-200531
8 Pricing for Automotive Coatings,
Adhesives & Sealants32
9 Selected VOC Content Standards
for Automotive Refinish Coatings ..35

OVERVIEW

- 1 Automotive Coatings, Adhesives &
Sealants Demand by Product48

AUTOMOTIVE COATINGS

- 1 Automotive Coatings Demand52
2 Demand by Formulation & Substrate .54
3 Demand by Polymer63
4 Urethane Auto Coatings Demand
by Market & Application65
5 Acrylic Auto Coatings Demand
by Market & Application67
6 Epoxy Auto Coatings Demand
by Market & Application69
7 Alkyd Auto Coatings Demand
by Market & Application71
8 Other Polymer Auto Coatings Demand
by Market & Application74
9 Auto Coatings Demand
by Market & Application76
10 Auto OEM Coatings Demand
by Polymer, Application & Vehicle..79
11 Light Vehicle OEM Coatings Demand
by Polymer, Application & Vehicle..86
12 Medium/Heavy Vehicle OEM Coatings
Demand by Polymer & Application .88
13 Auto Aftermarket Coatings Demand
by Polymer, Application & Vehicle..90
14 Light Vehicle Aftermarket Coatings
Demand by Polymer & Application .92
15 Medium/Heavy Vehicle Aftermarket
Coatings Demand
by Polymer & Application93
Cht US Market Share, 200596

AUTOMOTIVE ADHESIVES

- 1 Automotive Adhesives Demand106
2 Demand by Formulation107
3 Demand by Polymer113
4 Acrylic Auto Adhesives Demand
by Market & Application114
5 Urethane Auto Adhesive Demand
by Market & Application116
6 Vinyl Auto Adhesives Demand
by Market & Application118
7 Epoxy Auto Adhesives Demand
by Market & Application120
8 Rubber Auto Adhesives Demand
by Market & Application122
9 Other Auto Adhesives Demand
by Market & Application124
10 Auto Adhesives Demand
by Market & Application126
11 Auto OEM Adhesives Demand
by Polymer, Application & Vehicle129
12 Light Vehicle OEM Adhesives Demand
by Polymer, Application & Vehicle131
13 Medium/Heavy Vehicle OEM Adhesives
Demand by Polymer & Application132
14 Auto Aftermarket Adhesives Demand
by Polymer, Application & Vehicle135
15 Light Vehicle Aftermarket Adhesives
Demand by Polymer & Application137
16 Medium/Heavy Vehicle Aftermarket
Adhesives Demand by Application138
Cht US Market Share, 2005141

AUTOMOTIVE SEALANTS

- 1 Automotive Sealants Demand145
2 Demand by Formulation147
3 Demand by Polymer150
4 Silicone Auto Sealants Demand
by Market & Application152
5 Urethane Auto Sealants Demand
by Market & Application154
6 Synthetic Elastomer Auto Sealants
Demand by Market & Application .156
7 Bituminous Auto Sealants
Demand by Market & Application .157
8 Other Polymer Auto Sealants
Demand by Market & Application .160
9 Auto Sealants Demand
by Market & Application162
10 Auto OEM Sealants Demand
by Polymer, Application & Vehicle164
11 Light Vehicle OEM Sealants Demand
by Polymer, Application & Vehicle166
12 Medium/Heavy Duty Vehicle
OEM Sealants Demand
by Polymer & Application167

- 13 Auto Aftermarket Sealants Demand
by Polymer, Application & Vehicle169
14 Light Vehicle Aftermarket Sealants
Demand by Polymer & Application171
15 Medium/Heavy Duty Vehicle
Aftermarket Sealants Demand
by Polymer & Application172
Cht US Market Share, 2005175

APPLICATIONS

- 1 Auto Coatings, Adhesives & Sealants
Demand by Application182
2 Exterior Applications for Auto
Coatings, Adhesives & Sealants ...183
3 Under the Hood Applications for Auto
Coatings, Adhesives & Sealants ...189
4 Interior Applications for Auto
Coatings, Adhesives & Sealants ...190
5 Under Body Applications for Auto
Coatings, Adhesives & Sealants ...191

MARKETS

- 1 Auto Coatings, Adhesives & Sealants
Demand by Market & Vehicle194
2 OEM Demand for Auto Coatings,
Adhesives & Sealants by
Product, Vehicle & Application197
3 OEM Light Vehicle Demand for Auto
Coatings, Adhesives & Sealants by
Vehicle, Product & Application199
4 OEM Passenger Car Demand
for Coatings, Adhesives
& Sealants by Product200
5 OEM Light Trucks & Vans Demand
for Coatings, Adhesives &
Sealants by Product202
6 OEM Heavy Truck & Bus Demand for
Coatings, Adhesives & Sealants
by Product & Application204
7 Aftermarket Demand for Auto Coatings,
Adhesives & Sealants by Product,
Vehicle, Outlet & Application206
8 Light Vehicle Aftermarket Demand for
Auto Coatings, Adhesives & Sealants
by Product, Vehicle & Application208
9 Heavy Truck & Bus Aftermarket Demand
for Coatings, Adhesives & Sealants
by Product & Application209

INDUSTRY STRUCTURE

- 1 US Automotive Coatings, Adhesives &
Sealants Sales by Company, 2005 212
Cht US Market Share by Company, 2005. 214
2 Selected Acquisitions & Divestitures221
3 Selected Cooperative Agreements ...224

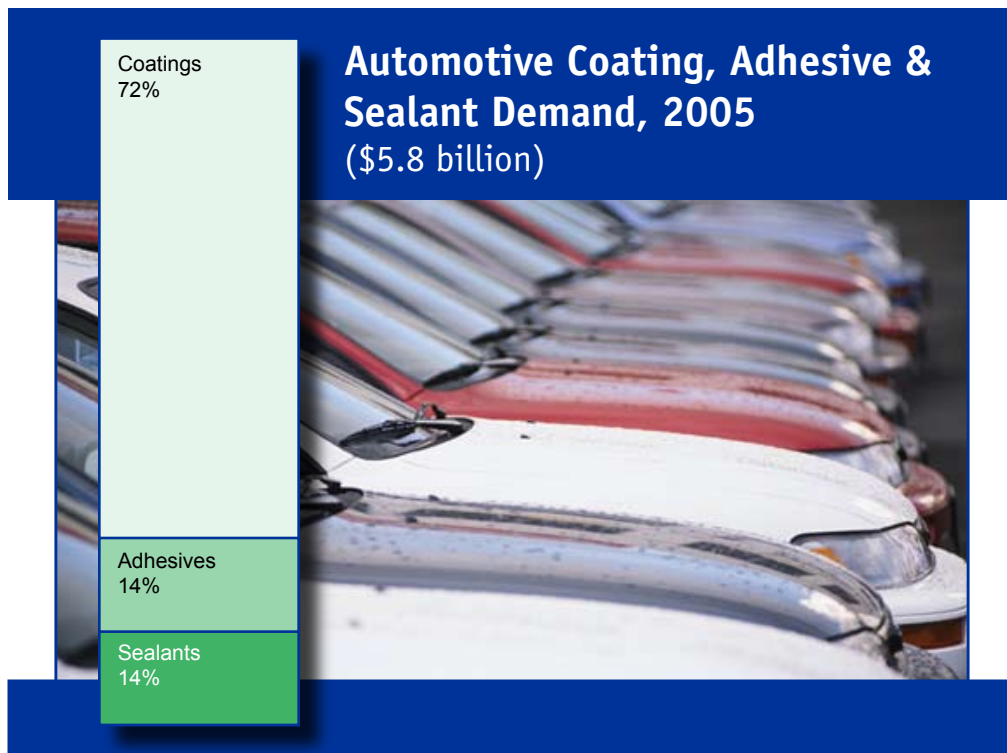
Consumer tastes for larger vehicles, greater use of structural adhesives and efforts to make quieter cabins will all increase utilization rates for coatings, adhesives and sealants.

US automotive coating, adhesive & sealant demand to grow 4.1% annually through 2010

Demand for automotive coatings, adhesives and sealants in the United States is forecast to rise 4.1 percent per year to over \$7 billion in 2010. Growth in OEM demand will be supported by US motor vehicle production, which will rebound from declines posted during the 2000-2005 period. However, these gains will be mostly linked to passenger cars, which consume less coatings, adhesives and sealants on a per vehicle basis than larger vehicles. Aftermarket demand will continue to benefit from a change in the product mix over the last decade favoring larger light vehicles, as well as from gains in the number of vehicles in use.

Vehicle manufacturing trends to favor structural adhesives, sealants

In addition to growth in vehicle production and vehicles in use, demand for coatings, adhesives and sealants will benefit from other factors which will increase utilization rates of these materials. For example, although consumer tastes have tended to favor larger, heavier vehicles over the last decade, automotive designers continue to stress weight reduction and improved fuel efficiency, while focusing on safety, aesthetics and durability. Taken together, these efforts are promoting greater use of structural adhesives such as epoxies and polyurethanes at the expense of me-



chanical fasteners, both to reduce weight and to eliminate potential corrosion problems. Similarly, sealant demand has directly benefitted from efforts to make car cabins quieter and better insulated.

Environmental regulations to continue pushing move away from low-solids solvent-based formulations

Environmental regulations are a major factor in the industry, with the primary drive in reformulation efforts being the reduction of volatile organic compound and hazardous air pollutant emissions from automotive assembly and repair operations. In all segments, these trends have prompted a move away from

low-solids solvent-based formulations. Replacement materials include high-solids solvent-based products (including a shift away from hydrocarbon solvents) and water-based emulsions. Powder and radiation-cured coatings are also seeing strong gains, while in the adhesives and sealants segments steady gains are forecast for hot melts and radiation-curable materials. The automotive refinish coatings market was one of the last bastions of low-solids solvent-based coatings, but relatively recent federal regulations in this sector significantly tightened emission allowances from repair shops. Suppliers initially responded with higher-solids versions of solvent-based paints, but new generations of water-based automotive refinish paints are also expected to emerge as major product lines.

Sample Text, Table & Chart

AUTOMOTIVE ADHESIVES

Urethane

Demand for urethane automotive adhesives is forecast to increase in 2010. These adhesives are used for their ability with a variety of substrates including plastics and glass. Nevertheless, urethane is facing competition from acrylics and epoxies, limiting gains. In 2010, urethane is forecast to account for 22 percent of total auto

Urethane adhesives are able to bond several types of substrates including plastics, metal, composites and glass. Urethane adhesives benefit from continued use of plastics in motor vehicle production. As steel continues to be displaced in vehicles by plastics, urethane adhesives are finding greater use in the structural bonding of plastic components. Plastic components and parts commonly bonded with urethane adhesives include bumpers, head and rear light housings, heating and ventilation systems, instrument panels and trim.

Urethane adhesives are also used to bond metal substrates, such as in the case of anti-flutter bonding, where urethane adhesives are used in the assembly of hoods, trunks and roofs. Dow Automotive is among the suppliers of urethane adhesives for metal substrates. The company offers polyurethane adhesives under the BETAMATE tradename, including one-part, moisture-curing polyurethane trim adhesives that are formulated to provide adhesion to electrogalvanized steel, phosphate steel, E-coated steel, and trim materials used in headliner systems.

In addition, urethane adhesives, such as ADCO Global's TITAN adhesives and Dow Automotive's BETASEAL adhesives, can be used to bond windshields and back windows directly into the car body which is commonly called direct glazing. Bonding windows into a car body

115

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TABLE IV-11

LIGHT VEHICLE OEM COATINGS DEMAND
 BY POLYMER, APPLICATION & VEHICLE
 (million dollars)

Item	1995	2000	2005	2010	2015
Light Vehicle Production (000 units)	11,000	11,000	11,000	11,000	11,000
\$ OEM coatings/vehicle	12	12	12	12	12
Light Vehicle OEM Coatings Demand	132	132	132	132	132
By Polymer:					
Urethane	7	7	7	7	7
Acrylic	6	6	6	6	6
Other	8	8	8	8	8
By Application:					
Exterior	2	2	2	2	2
Other	9	9	9	9	9
By Vehicle:					
Passenger Cars	0	0	0	0	0
Light Trucks, Vans & SUVs	1	1	1	1	1
% light vehicle					
Automotive OEM Coatings Demand	1388	1833	2284	2730	3250

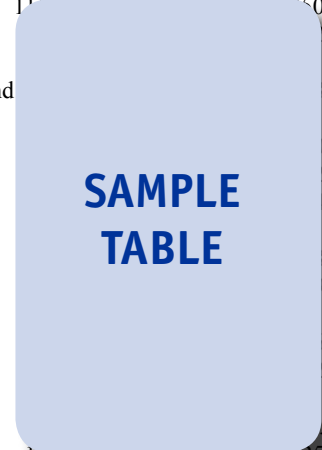
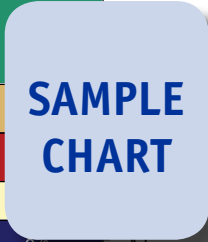
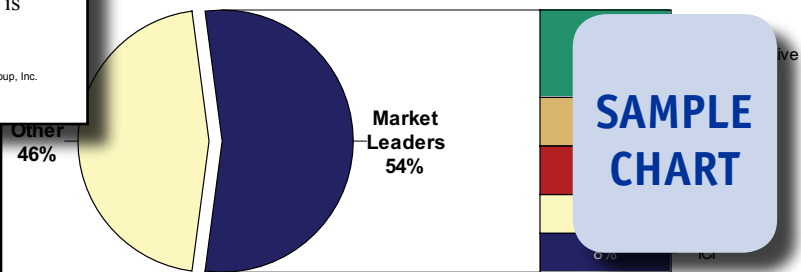


CHART VI-1

US AUTOMOTIVE SEALANTS MARKET SHARE, 2005
 (\$765 million)



Sample Table & Profile

Companies Profiled

ADCO Global.....	232
Akzo Nobel	234
BASF AG	236
Bayer AG	239
Bemis Associates	241
Ciba Specialty Chemicals	242
Cytec Industries.....	243
Dainippon Ink and Chemicals... ..	246
Dow Chemical.....	247
Dow Corning	248
DuPont (EI) de Nemours.....	250
FinishMaster Incorporated.....	253
Forbo Holding	255
Fuller (HB) Company	257
General Electric	258
Henkel KGaA	260
Huntsman Corporation	263
Illinois Tool Works	265
Imperial Chemical Industries ...	268
Lord Corporation.....	270
MAACO Enterprises	272
Nippon Paint.....	273
NOF Corporation	275
PPG Industries.....	277
Radiator Specialty.....	280
Red Spot Paint & Varnish	281
Reichhold Incorporated.....	282
Rohm and Haas	283
RPM International.....	286
Sherwin-Williams Company	289
ThreeBond Company.....	292
3M Company	293
Total SA	295
Transtar Industries	298
US Paint.....	300
Valspar Corporation	301
Wacker-Chemie	303

TABLE VII-5
UNDER BODY APPLICATIONS FOR
AUTOMOTIVE COATINGS, ADHESIVES & SEALANTS
(million dollars)

Item	1995	2000	2005	2010	2015
Motor Vehicles & Parts Shpts (bil \$)	370	460	460	510	567
\$ CAS/000\$ vehicles					
Under Body Automotive CAS Demand	5	3	3	3	3
Coatings					
Adhesives					
Sealants					
% under body	13	7	7	6	5
Automotive CAS Demand	3509	4489	3705	7055	6480



COMPANY PROFILES

Red Spot Paint & Varnish Company Incorporated

1107 East Louisiana Street
Evansville, IN 47711
812-428-9100
<http://www.redspot.com>

Annual Sales: \$100 million (verify, 1/06)
Employment: 600

Key Products: waterborne automotive coatings; automotive component based coatings; and ultraviolet-curable and anti-rust coatings.

Red Spot Paint & Varnish Company produces primers, varnishes and special coatings for automotive applications. The Company is privately held.

The Company's products, which are primarily sold under the RED SPOT brand name, include interior and exterior automotive coatings. For interior automotive applications, Red Spot Paint & Varnish produces a variety of waterborne and solventborne coatings that are designed to provide chemical and mar resistance. These interior automotive coatings are suitable for use on consoles, dashboards, instrument panels, door panels and other interior components.

For exterior automotive applications, the Company makes primers, adhesion promoters, one- and two component basecoats, and two component clearcoats. The Company's primers are intended for use on exterior automotive components made from thermoplastic elastomer polyolefins. Basecoats made by the Company feature durability and color consistency, and can be used on flexible or rigid automotive components such as spoilers, side moldings and wheel trim. Red Spot Paint & Varnish's two component clearcoats are formulated to offer weather and chemical resistance.



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OTHER STUDIES

Wood Protection Coatings & Preservatives

US demand for wood protection coatings and preservatives will grow 3.4% annually through 2011, driven in part by a shift toward higher value formulations. Interior applications such as flooring and cabinets will lead gains. Exterior uses will continue to suffer from wood's gradual market losses to lower-maintenance alternatives. This study analyzes the \$2.9 billion US wood protection industry, with forecasts for 2011 and 2016 by product, application and market. It also details market share and profiles major firms.

#2243 10/2007..... \$4500

Pigments: Inorganic, Organic & Specialty

US color pigment demand will grow 4.4% yearly through 2011, driven by a shift toward high-performance organic pigments and specialty types. Metallic, pearlescent and other specialty pigments will lead gains based on the need for more novel, eye-catching optical effects in automotive coatings, printing inks, plastics, cosmetics and toiletries. This study analyzes the \$3 billion US pigments industry, with forecasts for 2011 and 2016 by type and market. It also details market share and profiles major players.

#2232 08/2007..... \$4500

Industrial & Institutional Cleaning Chemicals

US demand for industrial and institutional (I&I) cleaning chemicals will grow 3.8% annually through 2010. Value gains will be boosted by more multifunctional and concentrated types. Disinfectants and sanitizers will grow the fastest based on heightened safety and health concerns. Specialty surfactants and additives will pace raw materials. This study analyzed the \$8.3 billion I&I cleaning chemical industry for 2010 and 2015 by material, product and market. It also details company market share and profiles major players.

#2117 10/2006..... \$4400

Solvents

US solvent demand will reach \$4.4 billion in 2010. Specialty solvents, environmentally friendly "green solvents" and recently deregulated conventional types will lead gains. Value demand will also benefit from the ongoing replacement of hydrocarbon and chlorinated solvents with ketones, esters, green solvents and other higher-value products. This study analyzes the 12.5 billion pound US solvents industry to 2010 and 2015 by type, function and market. It also details company market share and profiles major players.

#2055 04/2006..... \$4300

World Architectural Paints

Global architectural paint demand will rise 3.7% per year through 2009, led by gains in emerging markets such as China and India. The shift toward water-borne paints and increasing sales to the DIY sector will continue, especially in developing regions. This study analyzes the \$31.3 billion world architectural paint industry to 2009 and 2014 by paint formulation, market, end user (professional, consumer/DIY), world region and for 22 countries. It also evaluates producer market share and profiles major players.

#2028 01/2006..... \$5300

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