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# World Architectural Paints

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Industry Study with Forecasts for **2011 & 2016**

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Study #2311 | February 2008 | \$5600 | 272 pages

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*Gains will be paced by developing countries in the Asia/Pacific region, with the world's two most populous nations -- China and India -- both seeing large gains in their markets.*

## Global demand to rise 3.9% annually through 2011

World demand for architectural paints is forecast to rise 3.9 percent per year through 2011 to 21.5 million metric tons, valued at \$47 billion. Gains will be paced by developing countries in the Asia/Pacific region, with the world's two most populous nations -- China and India -- both seeing large gains in their markets. In 2006, architectural paint demand in China and India stood at 1.2 and 0.6 kilograms per person respectively. In contrast, per capita demand in developed countries averages around nine to ten kilograms. North America will register the weakest gains of all regions through 2011. A downturn in new US residential building construction spending growth through 2011 will restrain paint sales to the new homes market, while declining sales of existing homes will hamper paint sales to the much larger home repainting segment. Western Europe will also register weak growth, but will remain the world's leading exporter of architectural paint, due largely to Germany.

## Water-based paints to continue market gains

Water-based paints expanded their share of the global architectural paint market from 63 percent in 1996 to 69 percent in 2006. Solvent-based paints have lost share due to environmental concerns regarding their high volatile organic compound (VOC) emissions, and due to improving technology, which has enabled water-based paints to

## World Architectural Paint Demand (21.5 million metric tons, 2011)



provide all the positive benefits of solvent-based paints without the associated environmental negatives. Through 2011, water-based paints will expand their share of the global market to 73 percent. Western Europe's paint industry will see a penetration rate of 88 percent by 2011, spurred by some of the strictest environmental regulations in the world.

## DIY paint demand to outpace pros in most regions

All regions other than Western Europe will see do-it-yourself (DIY) paint demand growing faster than professional sector paint demand through 2011. In most developing countries, the existing DIY sector represents less than 20

percent of the overall architectural paint market. However, as large scale retail paint and general home improvement stores continue to proliferate into previously unpenetrated locales, and as increasing worldwide internet connectivity leads to easy online access to paint product and painting information, DIY paint jobs will become more common in the developing world. In Western Europe, on the other hand, the DIY sector already represents a world leading 40 percent of the overall market as a result of years of cultural preferences toward painting one's own home. However, recent trends suggest a shift in favor of the professional sector in Western Europe through 2011, in spite of the high labor cost in the region.

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## Sample Text, Table & Chart

### ASIA/PACIFIC

#### India: Architectural Paint Demand

Demand for architectural paint in India is projected to increase by 10 percent per year through 2011. India has the world's fastest growing economies and strongest performances expected in 2008. India's economic expansion will occur in the construction sector, thereby benefitting the architectural paint industry. India's housing sector has flourished and is also taking off and benefitting the architectural paint industry. As mentioned earlier, current per capita GDP in India is among the lowest in the world and has significant growth potential. Repainting or remodeling activities account for about 10 percent of architectural paint demand in India, and a majority of interior repainting is undertaken during the October-December period. Parties associated with religious events such as Diwali, Eid and Christmas. Exterior repainting is typically done right after the monsoon season. Over the 2004-2006 period, exterior paints have been the fastest growing architectural paint market segment in India, registering around 20 percent annual growth.

Unlike much of the rest of the world, nonresidential buildings account for a majority of paint demand in India (57 percent in 2006). This phenomenon is usually a sign of rapid economic and infrastructure development in a nation, which holds true in the case of India. Through 2011, the nonresidential paint sector is expected to grow just slightly faster than the residential paint sector in India.

The vast majority of paint demand in India is via the professional sector due to the availability of a large and low cost labor force. Due to the absence of a significant DIY sector, paint companies such as Asian Paints have pools of certified paint contractors for their customers to use.

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SAMPLE  
TEXT

TABLE VI-7

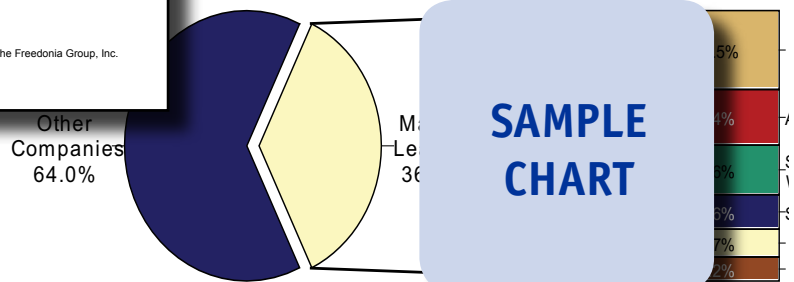
### INDIA -- ARCHITECTURAL PAINT SUPPLY & DEMAND

Item	1996	2001	2006	2011	2016
Population (million persons)	657	750	850	950	1,077
per capita GDP	100	150	200	250	300
Gross Domestic Product (bil 2005\$)	100	150	200	250	300
% building construction	4	4	4	4	4
Bldg Construction Expend (bil 2005\$)	4	6	8	10	12
Residential	1	1	1	1	1
Nonresidential	3	5	7	9	11
kg paint/capita	1	1	1	1	1
kg paint/mil \$ GDP	5	5	5	5	5
kg paint/000\$ bldg construction	5	5	5	5	5
Architect Paint Demand (000 m ton)	0	0	0	0	0
net exports	0	0	0	0	0
Architect Paint Production (000 m ton)	50	100	150	200	250

SAMPLE  
TABLE

CHART VIII-1

### WORLD ARCHITECTURAL PAINT MARKET SHARE BY COMPANY, 2006 (\$38 billion)



SAMPLE  
CHART

## Sample Profile, Table & Forecast

**TABLE XX-00**

**INDIA -- ARCHITECTURAL PAINT DEMAND  
BY MARKET & FORMULATION  
(000 metric tons)**

Item	1996	2001	2006	2011	2016
Bldg Construction Expend (bil 2005\$)	145	145	145	145	145
kg paint/000\$ bldg construction				74.5	72.5
Architectural Paint Demand				30	30
By Market:					
Residential Construction				15	15
Nonresidential Construction				15	15
By End User:					
Professional				20	20
Consumer/DIY				10	10
By Formulation:					
Water-based				20	20
Solvent-based				10	10

**SAMPLE  
TABLE**

### COMPANY PROFILES

**Dyrup A/S**  
 Gladsaxevej 300  
 2860 Soborg  
 Denmark  
 45 39 57 9300  
<http://www.dyrup.com>

Revenue: 2006: 1,000 million DKK  
 Geograph: Denmark 25%,  
 France 20%, Other Countries 23%

Key Products: Alkyd enamels; and  
 solvent-based wood stains

Dyrup is a manufacturer of paints and coatings for do it yourself (DIY), professional and industrial applications. The Company is wholly owned by Monberg & Thorsen A/S (Denmark), a holding company.

The Company participates in the world architectural paint industry through the manufacture of architectural paints and coatings primarily for the Denmark, Iberian Peninsula and Portugal markets. These paints and coatings are sold under the DYRUP, GORI, BONDEX, XYLOPHENE and OVRIGE brand names. Specific products in these lines include solvent-free primers; acrylic and alkyd enamels; solvent- and water-based primers, topcoats and wood stains. DYRUP products, which accounted for 25 percent, or approximately \$70 million, of the Company's total revenues in 2006, are sold in Denmark and Portugal. GORI products accounted for 28 percent, or approximately \$78 million, of Dyrup's 2006 revenues and are designed for use in the professional and industrial markets. Additionally, GORI brand products are used in the DIY markets in Denmark and Portugal. Dyrup's BONDEX paints

"DIY paint sales will post double-digit annual gains through 2011 and capture over 13 percent of the market in the process. Water-based architectural paints will also register an increase in their market share from 53 percent in 2006 to 63 percent in 2011, although this ratio will remain well below the global average."

--Section VI, pg. 110

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**Automotive Coatings, Adhesives & Sealants**

The US market for automotive coatings, adhesives and sealants is analyzed in this study. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by formulation (e.g., water-based, solvent-based); polymer (e.g., acrylic, urethane, epoxy, vinyl); market (e.g., exterior, under the hood, interior, under body); and application (OEM, aftermarket). The study also considers market environment factors, details industry structure, evaluates company market share and profiles major producers.

#2317 ..... 04/2008..... \$4500

**Pulp & Paper Chemicals**

US pulp and paper chemical demand will reach 19.8 million tons in 2011 based on rising paper and board production, the use of recycled paper and demand for brighter paper and board. Higher-priced specialty additives will lead gains due to their ability to lower pollution and production costs and improve quality. This study analyzes the \$7.7 billion US pulp and paper chemical industry, with forecasts for 2011 and 2016 by product type and end user. It also evaluates company market share and profiles major players.

#2293 ..... 02/2008..... \$4500

**World Flame Retardants**

World flame retardant demand will grow 4.7% per year through 2011. Gains in developing countries will be driven by more stringent flammability regulations and the use of more plastics. More mature markets will experience an acceleration in demand due to an upswing in manufacturing. This study analyzes the \$3.6 billion world flame retardant industry, with forecasts for 2011 and 2016 by product, market, world region and 17 countries. It also details company market share and profiles major players.

#2277 ..... 12/2007..... \$5400

**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

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