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# Paint & Coatings

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US Industry Study with Forecasts for **2012 & 2017**

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Study #2386 | August 2008 | \$4600 | 323 pages

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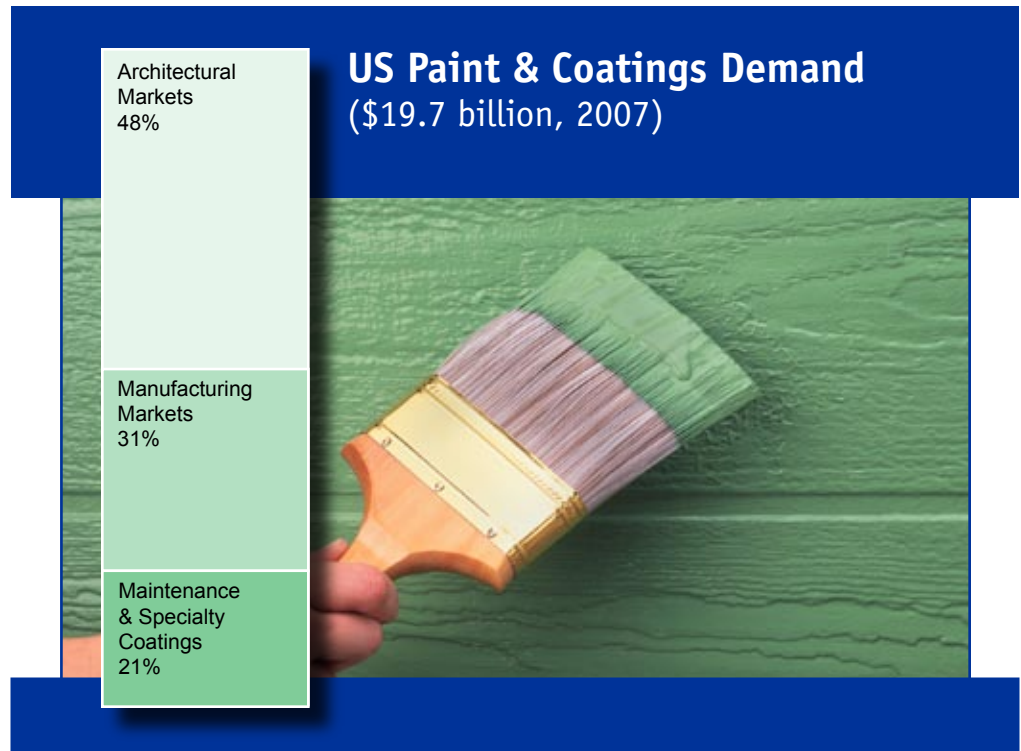
*Growth in US coatings will be aided by an improving outlook for both construction and manufacturing activity, and favorable export opportunities, particularly in Mexico and the Asia/Pacific region.*

## US demand to reach \$23 billion in 2012

US demand for paint and coatings is forecast to expand 3.1 percent per annum to \$23 billion in 2012. Volume gains are projected to accelerate from the sluggishness of the 2002-2007 period, when an economic slowdown, combined with high raw material costs and stringent environmental regulations, took a toll on the US paint and coatings industry. Going forward, however, growth will be aided by an improving outlook for both construction and manufacturing activity. Production of paint and coatings will be further supported by favorable export opportunities for US-produced coatings, particularly in Mexico and the Asia/Pacific region. US shipments are forecast to rise 3.1 percent per year through 2012 to \$24.7 billion.

## Architectural paints to remain largest segment

Architectural paints represent the largest segment of the overall paint and coatings market, accounting for approximately half of demand in both volume and value terms. The residential market will continue to account for the vast majority of architectural paint demand and will benefit from rebounding growth in residential construction activity, as well as a significant turnaround in new housing starts through 2012. Demand for interior paint will outpace that for its exterior counterpart, as demand for the latter will be restrained by the ongoing



popularity of siding materials, such as vinyl, which do not require paint. However, rapid growth in the use of fiber cement -- a paintable siding material -- will bode well for exterior paint demand.

Coatings used in the manufacture of various goods will benefit from an expected acceleration in manufacturing activity from the poor performance of the previous decade. The motor vehicle market will continue to account for a significant portion of coatings demand and will be supported by a projected rebound in motor vehicle production. Metal building components will be among the fastest growing of the manufacturing markets, with growth attributable to greater use of prefabricated

metal building systems in the US construction industry, particularly in nonresidential settings, where the functionality and labor cost savings of these systems are most beneficial.

Maintenance and specialty coatings will account for approximately one-fifth of overall demand. Rebounding growth in highway maintenance expenditures will drive rapid advances in the road and bridge market. Coatings associated with bridge repair and maintenance will benefit from increased concern over bridge safety as a result of the August 2007 collapse of the I-35W bridge in Minneapolis, Minnesota.

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## Sample Text, Table & Chart

### ARCHITECTURAL MARKETS

**Improvement & Repair** -- Demand for architectural in residential improvement and repair markets is forecast to reach 225 million gallons in 2012, advancing 1.4 percent from 222 million gallons in 2011. Strongest gains in expenditures dedicated to improvement and repair markets should be seen in the interior improvement and repair ex

terior markets, demand for exterior improvement and repair markets will feel the effects of competition from vinyl siding. While the loss in market share in the improvement and repair market is not nearly as severe as it has been in new construction, vinyl siding has made steady inroads into the existing housing stock over the last few decades. This is attributable to two primary factors. First, many owners of older, wood-sided homes are opting to have their houses vinyl sided to eliminate the need for repainting and most exterior maintenance (such as siding replacement). This trend reduces outright the primary market base for exterior coatings, which consists of traditional wood-sided homes. Second, these losses are not being offset by the construction of new wood-sided homes, since the vast majority of new homes being built in the US are now vinyl sided. Due to these unfavorable trends, the market for exterior repainting in the US will post below-average gains, expanding 1.4 percent per year to 225 million gallons in 2012.

The repainting of traditional wood-sided homes will continue to account for the majority of demand for exterior architectural coatings. Other applications are also significant. For instance, houses using exterior siding types, such as brick, may still require paint for foundations, soffits, etc. Often, even vinyl-sided homes still have elements that typically require some exterior painting, such as trim (in cases where the home has been retrofitted with vinyl siding).

TABLE IV-4

### RESIDENTIAL BUILDING CONSTRUCTION MARKETS FOR ARCHITECTURAL PAINTS (million gallons)

Item	1997	2002	2007	2012	2017
Residential Constr Expend (bil 2000\$)	320	320	320	320	320
gallons/000\$ construction					
Residential Construction Markets By Project:					
New Construction					
Improvement & Repair					
By Application:					
Interior					
Exterior					
% residential construction markets					
Architectural Paint Demand	645	687	700	700	840

SAMPLE TABLE

CHART VII-1

### US PAINT & COATINGS MARKET SHARE BY COMPANY, 2007 (\$19.7 billion)

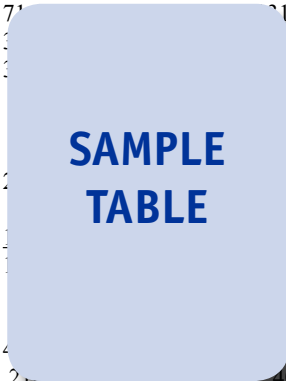


SAMPLE CHART

## Sample Profile, Table & Forecast

**TABLE V-17**  
**APPLIANCE COATINGS DEMAND**

Item	1997	2002	2007	2012	2017
Appliance Shipments (mil units)	17.1	17.5	18.0	18.5	19.0
Major Appliances	12.5	12.8	13.1	13.4	13.7
Small Appliances	4.6	4.7	4.9	5.1	5.3
gallons/000 units	145	148	151	154	157
gallons/000 units - major	98	100	102	104	106
gallons/000 units - small	47	48	49	50	51
Appliance Coatings Demand (mil gal)	2.1	2.2	2.3	2.4	2.5
Major Appliances	1.5	1.6	1.7	1.8	1.9
Small Appliances	0.6	0.6	0.6	0.6	0.6
\$/gallon	145	148	151	154	157
Appliance Coatings Demand (mil \$)	210	220	230	240	250



**COMPANY PROFILES**

**Ace Hardware Corporation**  
 2200 Kensington Court  
 Oak Brook, IL 60523  
 630-990-6600  
<http://www.acehardware.com>

Revenues: \$4.2 billion (2007)  
 US Revenues: \$3.9 billion (2007)  
 Employment: 18,000 (2007)

Key Products: ACE brand paints, including glow-in-the-dark paint, garage floor paint, etc.

**SAMPLE PROFILE**

Ace Hardware is a wholesaler of hardware and related products. The privately held company operates as a dealer-owned cooperative comprising approximately 5,000 independently owned and operated hardware retailers. In addition, Ace Hardware manufactures architectural paint and related coating products. The Company operates in three segments: Wholesale, Paint Manufacturing and Other.

The Company participates in the US paint and coatings industry through the Wholesale and Paint Manufacturing segments, which generated revenues of \$3.9 billion and \$18 million, respectively, in 2007. Via these segments, Ace Hardware produces and sells paints and paint-related products, including brushes, rollers and drop cloths.

Among Ace Hardware's ACE brand paints are ACE SENSATIONS and ACE SIMPLY MAGIC types. ACE SENSATIONS super-premium latex paints feature SCOTCHGARD stain-resistant technology from 3M Company (St. Paul, Minnesota) for easy stain removal. Paints in this range, which include satin finishes, are also resistant to such oily stains as grease and lipstick. ACE SENSATIONS paints are

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“Demand for appliance coatings is forecast to increase 1.8 percent per year to 18 million gallons in 2012, outpacing unit shipments of appliances over the same period. This performance will represent an improvement over the gains of the previous decade, during which appliance shipments declined nearly three percent annually. In addition to a marginal expansion in appliance shipments, demand for appliance coatings is rising due to the ...”  
 --Section V, pg. 139

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**Sealants & Caulks**

This study analyzes the US sealant and caulk industry. It presents historical data for 1997, 2002 and 2007 and forecasts to 2012 and 2017 by raw material (e.g., base materials and binders, carriers, fillers); type (e.g., polyurethane, silicone, bituminous, elastomer, acrylic, polysulfide); and market (e.g., construction, motor vehicles, industrial machinery and equipment, aerospace). The study also considers market environment factors, details industry structure, evaluates company market share, and profiles industry competitors.

#2393 ..... 09/2008..... \$4600

**Solvents**

Demand for solvents in the US will reach 11.8 billion pounds in 2012. Esters and alcohols will exhibit the best growth within the conventional solvents product group, though green solvents such as hydrogen peroxide and supercritical fluids will post more rapid gains. This study analyzes the \$5.5 billion US solvents industry, with forecasts for 2012 and 2017 by solvent product, market and function. It also considers market environment factors, evaluates company market share and profiles industry players.

#2357 ..... 06/2008..... \$4600

**Automotive Coatings, Adhesives & Sealants**

US demand for automotive coatings, adhesives and sealants will reach \$5.3 billion in 2012. Slow gains in the dominant coatings segment will offset faster growth in adhesives and sealants. Design trends will favor adhesives over mechanical fasteners and liquid over mechanical gaskets. This study analyzes the \$4.6 billion US automotive coating, adhesive and sealant industry, with forecasts for 2012 and 2017 by product, application and market. It also evaluates market share and profiles industry competitors

#2317 ..... 05/2008..... \$4500

**World Architectural Paints**

Global demand for architectural paints will grow 3.9% annually through 2011. Gains will be paced by developing Asia/Pacific countries, especially China and India. Water-based paints will continue to supplant solvent-based types to claim 73% of demand. This study analyzes the 17.8 million metric ton world architectural paint industry, with forecasts for 2011 and 2016 by formulation, market, end user, world region and for 23 major countries. It also evaluates company market share and profiles major players.

#2311 ..... 02/2008..... \$5600

**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

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