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# World Architectural Paint

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Industry Study with Forecasts for **2013 & 2018**

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Study #2604 | March 2010 | \$5800 | 327 pages

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*Gains will remain strong by long term historical standards as a result of healthy global economic growth and continuing gains in the world's urban population that will put a strain on the existing housing stock.*

## Global demand to rise 3.6% yearly through 2013

World demand for architectural paint is forecast to rise 3.6 percent per year through 2013 to 22.8 million metric tons, valued at \$51 billion. Although respectable, growth will slow in comparison to the performance of the 2003 to 2008 period due to a deceleration in global building construction growth through 2013. Gains will nevertheless remain strong by long term historical standards as a result of healthy global economic growth and continuing gains in the world's urban population that will put a strain on the existing housing stock -- prompting increased residential construction spending at both the public and private levels.

## Fastest gains in demand to remain in world's emerging markets

As was the case over the past decade, the most rapid gains will arise in the world's emerging markets, most prominently in Asia. Gains in Asia are based primarily on continued healthy expansion in the large Chinese and Indian markets. Although Japan is projected to post gains that will significantly lag the global average through 2013, the country's architectural paint market will see a reversal of the declines experienced during the 1998-2008 period. Due to these factors, the Asia/Pacific region will expand its market share to 35 percent of total architectural paint demand in 2013.



North America will post slightly above-average gains through 2013. Going forward, the housing and mortgage crisis that has plagued the US since 2006 will subside, providing opportunities for paint sales to the new homes market. Moreover, sales to the much larger home repainting segment will also benefit as sales of existing homes improve -- because existing homes are often repainted when they are to be sold. Western Europe's share of the global market will continue to slip as the region registers weak gains, due to below-average economic and building construction expenditure growth, mortgage sector weaknesses in some constituent nations and stagnant regional population gains. Nevertheless, Western Europe

will remain the world's leading regional net exporter of architectural paint, due largely to Germany.

## Water-based paint to continue gaining market share

In a continuation of a well-established trend, the global architectural paint market will be increasingly dominated by water-based formulations. This will be due in part to increased environmental concerns regarding volatile organic compound (VOC) emissions. The share of water-based paint is projected to rise to 71 percent in 2013. In most developed markets, the penetration of water-based formulations is already over 80 percent.

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## Sample Text, Table & Chart

### ASIA/PACIFIC

#### China: Architectural Paint Outlook

Demand for architectural paint in China is forecast to grow 7.3 percent per annum from 2008 to 2013, a deceleration from the 2003-2008 pace. China will remain the largest market for architectural paint in the world, with the country's population and per capita paint usage remaining high. The country will remain the largest market for architectural paint in the world, with the country's population and per capita paint usage remaining high. The country will remain the largest market for architectural paint in the world, with the country's population and per capita paint usage remaining high.

**SAMPLE TEXT**

The residential segment is projected to grow 7.3 percent from 2008 to 2013, a deceleration from the 2003-2008 pace. Residential gains in the amount of added residential floor space in China are responsible for this decelerated growth. Nonresidential demand for architectural paint is expected to expand 7.5 percent per year during this period, reflecting improving construction practices and strong economic gains. Advances in commercial, office, industrial and institutional construction activity in China will sustain strong growth in the nonresidential architectural paint segment. However, the country is wrapping up construction activity for the Shanghai 2010 Exposition, a restraining factor for nonresidential demand.

DIY painting in China is minimal and accounts for under 1 percent of the overall market. Cheap labor and historical cultural practices have enabled the flourishing of a dominant professional painter, although the consumer/DIY sector will register much faster growth through 2013. An increasing choice of retailers in urban areas, the growth of painting expertise via Internet websites, and increasing

TABLE VI-5

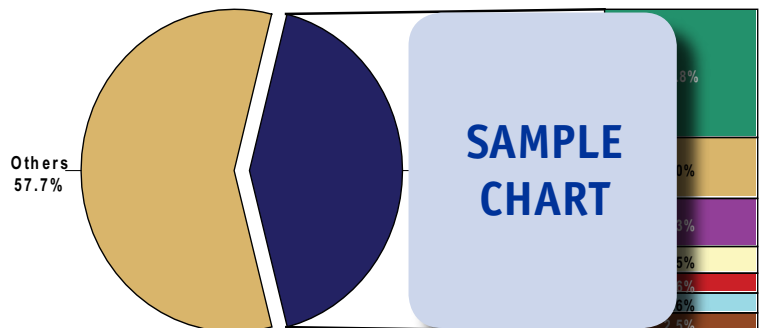
### CHINA -- ARCHITECTURAL PAINT SUPPLY & DEMAND

Item	1998	2003	2008	2013	2018
Population (million persons)	1,212	1,328	1,412	1,497	1,577
per capita GDP	772	1,148	1,770	2,720	3,850
Gross Domestic Product (bil 2007\$)	10,000	27,200	45,000	70,000	100,000
% building construction	1.5	1.8	2.1	2.4	2.7
Building Constr Expend (bil 2007\$)	1,500	4,900	9,450	16,800	27,000
Residential	1,000	3,200	6,300	11,500	18,000
Nonresidential	500	1,700	3,150	5,300	9,000
kg paint/capita	0.5	0.7	1.0	1.4	1.9
kg paint/mil \$ GDP	0.00007	0.00011	0.00016	0.00022	0.00030
kg paint/000\$ construction	0.00033	0.00048	0.00067	0.00093	0.00125
Architectural Paint Demand (000 m tons)	399	1,170	2,260	4,300	7,110
net exports	0	0	0	0	0
Architectural Paint Production (000 m tons)	399	1,170	2,260	4,300	7,110

**SAMPLE TABLE**

CHART VIII-1

### WORLD ARCHITECTURAL PAINT MARKET SHARE BY COMPANY (\$41.8 billion, 2008)



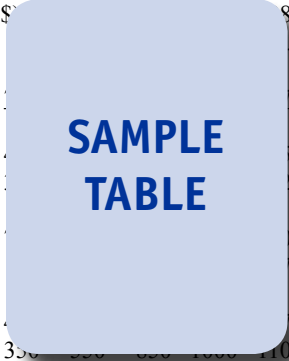
**SAMPLE CHART**

## Sample Profile, Table & Forecast

**TABLE VI-6**

**CHINA -- ARCHITECTURAL PAINT DEMAND BY MARKET, END USER & FORMULATION (000 metric tons)**

Item	1998	2003	2008	2013	2018
Building Construction Expend (bil 2007\$)					88
kg paint/000\$ construction					4
Architectural Paint Demand					0
By Market:					
Residential					0
Nonresidential					0
By End User:					
Professional					0
Consumer/DIY					0
By Formulation:					
Water-based					0
Solvent-based					0



**COMPANY PROFILES**

**Dyrup A/S**  
 Gladsaxevej 300  
 2860 Soborg  
 Denmark  
 45-39-57-93  
 http://www.c

**SAMPLE PROFILE**

Revenues: \$  
 Geographic  
 Other Count  
 Employment

mark 22% and

Key Products: acrylic and alkyd paint, synthetic enamels, wood varnishes, floor varnish, teak and decking oils, and wood stains

Dyrup is a manufacturer of paint and coatings for do-it-yourself (DIY) and professional applications. Prior to two divestitures in 2009, Dyrup also made paint and coatings for the industrial market. The Company is wholly owned by Monberg & Thorsen A/S (Denmark), a holding company.

The Company is active in the world architectural paint industry through the production of architectural paint and coatings primarily for the Denmark, Germany, Spain, France, Portugal and Poland markets. Of Dyrup's total sales in 2008, revenues from the DIY market accounted for 43 percent, or approximately \$135 million; while revenues from the professional market generated 38 percent or about \$120 million. Among the Company's architectural paint and coatings are acrylic and alkyd paint, synthetic enamels for use on metal surfaces, wood varnishes, floor varnish, teak and decking oils, and wood stains. The products are sold under such brand names as DYRUP, BONDEX, GORI, and XYLOPHENE. Of Dyrup's total revenues in 2008, DYRUP products

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"Despite outpacing the solvent-based paint sector over the past decade, water-based paints accounted for 67 percent of the Chinese architectural paint market in 2008, in line with the global average but significantly lagging penetration levels of over 80 percent in most developed countries. Through 2013, water-based paints will expand their share of the Chinese market to 73 percent, although solvent-based paint demand will continue to post respectable gains. Demand for water-based paints will be promoted by ..."

--Section VI, pg. 130

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**OTHER STUDIES**

**Commercial Printing**

US commercial printing revenue will rise 2.1% annually through 2014. Lithographic printing will remain dominant but will lose market share to processes better suited to shorter print runs, such as digital printing, which will lead gains. Best market opportunities include advertising, periodical, fabric and label/wrapper printing. This study analyzes the \$70 billion US commercial printing industry, with forecasts for 2014 and 2019 by process and application. It also evaluates company market share and profiles industry players.

#2615 ..... April 2010 ..... \$4700

**Packaging Inks, Coatings & Additives**

US demand for packaging inks, coatings and additives will rise 2.5% yearly through 2013. Demand will benefit from more environmentally friendly packaging, which will foster new sustainable and efficient products such as powder coatings, energy-curable inks and coatings, and bioplastic additives. This study analyzes the \$2.6 billion US packaging inks, coatings and additives industry, with forecasts for 2013 and 2018 by product type, substrate and packaging type. It also evaluates company market share and profiles industry players.

#2587 ..... December 2009 ..... \$4600

**Wood Protection Coatings & Preservatives**

US demand for wood protection products is forecast to increase 2.2% per year through 2013. Higher value formulations will continue to gain market share, primarily due to environmental and performance issues. Interior wood applications will achieve the best gains, promoted by a rebound in both housing starts and remodeling. This study analyzes the \$2.7 billion US wood protection industry, with forecasts for 2013 and 2018 by product, application and market. It also evaluates market share and profiles industry players.

#2509 ..... July 2009 ..... \$4800

**Powder Coatings**

US demand for powder coatings is forecast to grow 3.5% annually through 2013. The key motor vehicle market will be the fastest growing segment, followed by construction materials and lawn and garden equipment. Both thermoset and thermoplastic powder coatings will grow at the same pace. This study analyzes the 375 million pound US powder coating industry, with forecasts for 2013 and 2018 by raw material, product and market. It also evaluates company market share and profiles industry competitors.

#2518 ..... June 2009 ..... \$4700

**World Dyes & Organic Pigments**

Global demand for dyes and organic pigments is forecast to grow 3.9% annually through 2013. Textiles will remain the largest market, while faster growth will occur in printing inks, paint and coatings, and plastics. The Asia/Pacific region will lead gains and increase its market share to one-half of world demand by 2013. This study analyzes the world dye and organic pigment industry, with forecasts for 2013 and 2018 by product, market, region and for 20 countries. It also evaluates market share and profiles industry players.

#2508 ..... May 2009 ..... \$5800

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