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# Paint & Coatings

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US Industry Study with Forecasts for **2015 & 2020**

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Study #2812 | November 2011 | \$4900 | 348 pages

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*Although paint and coating price increases are expected moderate through 2015, volume growth will be fueled by renewed strength in manufacturing and construction activity.*

## US demand to rise 7.8% annually through 2015

US demand for paint and coatings is forecast to increase 7.8 percent annually to \$26.2 billion in 2015. The market is expected to expand strongly in both volume and value terms, rebounding from the declines of the recession-impacted 2005-2010 period. During this time, construction spending and manufactured goods output both fell, reducing coatings demand in the key architectural and manufacturing markets. More significant declines in market value were prevented by accelerating growth in product pricing over the period. Although price increases are expected to moderate through 2015, renewed strength in manufacturing and construction activity will fuel volume growth.

## Large architectural market to be fastest growing

The large architectural market will advance at an impressive annual rate of 10.8 percent through 2015, reaching more than \$14 billion. Demand will be promoted by renewed strength in the housing market, particularly as home building activity rebounds from low 2010 levels. The interior component of the architectural paint market will remain larger and grow faster than its exterior counterpart. The latter will continue to be negatively affected by the introduction of more efficient products that reduce coatings requirements on a volume basis and the growing popularity of siding materials (e.g., vinyl) that do not need

## US Paint & Coatings Demand (\$18 billion, 2010)



painting. On the bright side, the rising use of fiber cement will support demand for exterior paint. Unlike vinyl, fiber cement siding can be painted. To the extent that fiber cement displaces vinyl siding, this trend will provide opportunities for exterior paint demand.

Sales of paint and coatings in manufacturing markets will expand at a respectable rate through 2015, reversing the downward trend of the 2000-2010 period. Among the various market segments, furniture and fixtures will enjoy one of the best growth prospects, and will remain the leading outlet for coatings over the forecast period. However, the motor vehicle sector will post more rapid gains, recapturing its position as the second largest outlet for

coatings among manufacturing markets. Although demand will benefit from strong growth in motor vehicle output, this will be offset to some extent by a move toward smaller, more fuel-efficient automobiles at the expense of larger vehicles such as sport utility vehicles.

Maintenance and specialty coatings will remain the smallest market through 2015. Key outlets include industrial maintenance, and road and bridge markets. Both are expected to advance at above-average rates, promoted by increased nonresidential improvement and repair activity and by greater spending directed toward the maintenance of the aging US infrastructure.

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## Sample Text, Table & Chart

### MAINTENANCE & SPECIALTY COATINGS

**Coatings Demand** -- Industrial maintenance coatings expected to increase 2.3 million gallons annually, outpacing real (inflation-adjusted) residential improvement and repair expenditures. The market is forecast to benefit from an improvement in maintenance spending from businesses and government agencies, and from procedures during the construction process. However, use of more durable coatings and longer intervals between maintenance, will continue to restrict overall market gains. Industrial maintenance coatings will improve in value terms, from the decline of the 2005-2010 period, advancing 5.2 percent to \$1.2 billion in 2015.

The majority of demand for maintenance coatings is dedicated to the repainting of existing structures. As a result, the health of the market is largely dependent on the ongoing maintenance requirements of industrial facilities, including increased plant building activity in key industries such as chemicals, paper mills, and food and beverage processing facilities.

This segment of the coatings industry encompasses specially formulated protective coatings used for exterior and interior applications in the industrial sector. While these coatings are applied to structures, they are distinct from architectural coatings, distinguished by the fact that they are not applied for aesthetic purposes, but rather as a part of routine maintenance to protect walls, floors and ceilings from fungi, mold and other degenerative factors. Typical applications include uninsulated stacks, breechings and piping. Other structures requiring protection include storage tanks, oil and gas recovery equipment, refineries, as well as interior surfaces such as walls, floors, and equipment. These coatings also differ from industrial coatings on assembly lines in controlled environments. Unlike the other

185

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**SAMPLE  
TEXT**

TABLE IV-4

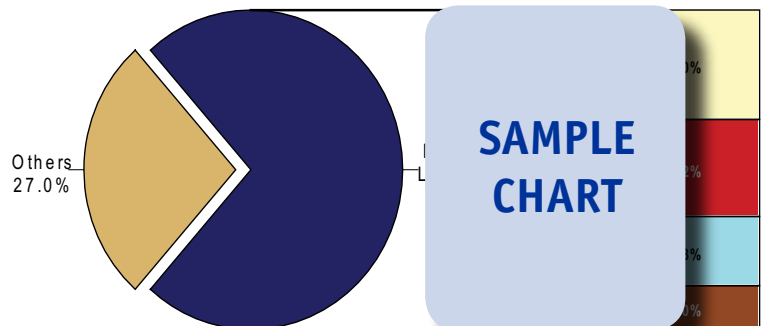
### RESIDENTIAL BUILDING CONSTRUCTION MARKETS FOR ARCHITECTURAL PAINT (million gallons)

Item	2000	2005	2010	2015	2020
Residential Construct Expend (bil 2005\$ gallons/000\$ construction					
Residential Construction Markets By Project:					
New Construction					
Improvement & Repair					
By Application:					
Interior					
Exterior					
% residential construction markets Architectural Paint Demand					

**SAMPLE  
TABLE**

CHART VII-1

### US PAINT & COATINGS MARKET SHARE, 2010 (\$18 billion)

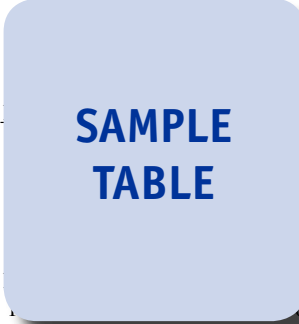


**SAMPLE  
CHART**

## Sample Profile, Table & Forecast

**TABLE V-5**  
**FURNITURE & FIXTURE COATINGS DEMAND**  
 (million gallons)

Item	2000	2005	2010	2015	2020
Furniture Shipments (bil 2005\$) gallons/000\$ furniture					
Furniture & Fixture Coatings Demand:					
Wood Furniture & Fixtures					
Non-Wood Furniture & Fixtures:					
Powder Coatings					
Other Coatings					
\$/gallon					
Furniture & Fixture Coatings (mil \$)					



**COMPANY PROFILES**

**Ennis Paint Incorporated**  
 5910 North Central Expressway, Suite 1050  
 Dallas, TX 75206  
 214-874-7200  
 http://www.ennispaint.com

Annual Sales:  
 Employment:

Key Products: traffic paints; methacrylates; and decorative road finishes.

Ennis Paint is a wholly owned subsidiary of The Company. The Company is privately held.

The Company participates in the US paint and coatings market through the production of waterborne, solventborne and other types of traffic paints. Ennis Paint also produces and sells methacrylates and decorative road finishes. The Company conducts paint and coatings manufacturing operations at US facilities in Ennis and Dallas, Texas; Salem, Oregon; Niles, Illinois; Bakersfield, Los Angeles and San Diego, California; Hannibal, Missouri; Richmond, Virginia; and Atlanta, Georgia. The Company also has three locations in Canada.

Ennis Paint's standard dry waterborne traffic paint is intended for interior and exterior asphalt, curbs and parking lots, and is designed not to cause asphalt curling. Waterborne products are marketed under such brand names as DURASHEEN and WOLVERINE, and also include high-build and fast-dry types. Ennis Paint's DURASHEEN traffic paint is formulated to be dirt, oil and grease resistant for concrete and asphalt surfaces where dirt is problematic. This product is 100 percent acrylic and ultraviolet stable. WOLVERINE traffic paint is a fast-dry,

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“Demand for coatings used in the manufacture of furniture and fixtures is projected to rise 4.2 percent per annum to 98 million gallons in 2015, valued at \$1.5 billion. This represents a significant turnaround from the performance of the 2005-2010 period, during which time furniture shipments declined sharply. Going forward, advances will be supported by increased production of both wood and non-wood furniture, driven by strong rebounds in new housing completions. Nevertheless, ...”  
 --Section V, pg. 118-9

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**OTHER STUDIES**

**Automotive Coatings, Adhesives & Sealants**

US automotive coating, adhesive and sealant demand will rise 9.4 percent yearly through 2014 as motor vehicle output recovers from the recent downturn. Coatings will remain the dominant segment, with water-based, powder and radiation-curable types leading gains. This study analyzes the \$3.6 billion US automotive coating, adhesive and sealant industry with forecasts for 2014 and 2019 by formulation and substrate, polymer, market and application. It also evaluates company market share and profiles industry competitors.

#2714 ..... November 2010 ..... \$4800

**Industrial & Institutional (I&I) Cleaning Chemicals**

US demand for industrial and institutional (I&I) cleaning chemicals will increase four percent annually through 2014. Disinfectants and sanitizers will be the fastest growing type as the food industry faces tighter safety requirements. General purpose cleaners and floor care cleaners will remain the largest segments. This study analyzes the \$8.8 billion US I&I cleaning chemical industry, with forecasts for 2014 and 2019 by market, product and raw material. It also evaluates company market share and profiles industry players.

#2683 ..... September 2010 ..... \$4900

**World Architectural Paint**

Global demand for architectural paints will rise 3.6 percent yearly through 2013. The fastest gains will arise in emerging markets, mostly in Asia. The North American market will benefit from a recovery in the US housing market. Water-based formulations will continue to gain market share. This study analyzes the \$42 billion world architectural paint industry, with forecasts for 2013 and 2018 by market, end-user, formulation, world region and for 23 countries. It also evaluates company market share and profiles industry participants.

#2604 ..... March 2010 ..... \$5800

**Packaging Inks, Coatings & Additives**

US demand for packaging inks, coatings and additives will rise 2.5 percent 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

**Soy Chemicals**

US soy chemical demand will grow 7.8 percent annually through 2013, driven by the continued penetration of biodiesel, and by the adoption of alternatives to traditional, petrochemical-based materials in manufacturing. Soy oil derivatives such as methyl soyate, polyols, soy-based foamed plastics, waxes and fatty acids hold particularly good prospects. This study analyzes the \$1.9 billion US soy chemical industry, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry players.

#2538 ..... September 2009 ..... \$4700

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