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World Paint & Coatings

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

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INDUSTRY STRUCTURE

Advances will be driven by a strong acceleration in world building construction spending, particularly residential construction, which is expected to rebound in North America and Western Europe.

World demand to rise 5.4% annually through 2015

Global demand for paint and coatings is forecast to rise 5.4 percent per year to 45.6 million metric tons in 2015. Advances will be driven by a strong acceleration in world building construction spending, particularly residential construction, which is expected to rebound in North America and Western Europe. Healthy growth in global manufacturing activity will also fuel increased demand for coatings used in the production of motor vehicles and other durable goods, as well as industrial maintenance applications. Solvent-based paint and coatings will continue to see their share of the market decline in both developed and developing markets, as ongoing efforts to reduce the emission of volatile organic compounds (VOCs) are spurring the rise of alternative formulations.

Asia/Pacific region to offer best growth prospects

The Asia/Pacific region will remain the leading consumer of paint and coatings through 2015, and will also see the most rapid gains. Regional demand will be fueled by China and India, the two largest markets in Asia and two of the fastest-growing coatings markets in the world. Additionally, an improved outlook for coatings demand in Japan will bolster gains in the Asia/Pacific region. Above-average advances are also forecast for North America, rebounding strongly from the declining demand of the 2005-2010 period. Coatings demand in the region will benefit from a greatly improved outlook for building construction and manufacturing activity in the US. While paint and coatings demand in Western Europe will see a similar recovery from recent declines, the region will be the world's slowest-growing regional market. Among the other areas of the world, the best opportunities are expected in the Africa/Mideast region, where paint demand per capita is the lowest in the world.

Architectural market to remain dominant segment

Architectural markets will continue to account for a majority of paint and coatings demand in 2015. Demand for architectural paint will be fueled by healthy growth in residential construction spending, particularly in the US, Western Europe and Japan. Coatings demand in manufacturing applications will benefit from a pickup in world motor vehicle production, as well as an improvement in building construction activity, which will drive demand for furniture coatings. Maintenance and specialty coatings markets will see moderately slower gains, restrained by a downturn in marine applications, as well as a more negative outlook for vehicle refinish coatings in the developed countries of the world.

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Sample Text, Table & Chart

ASIA/PACIFIC

India: Paint & Coatings Demand

Demand for paint and coatings in India is projected to i
percent per year through 201 s, valu
billion. Although slowing n digit
2000-2010 decade, advance ajor
the world. Growth will be f crea
residential and nonresidenti well
turing output. Given the lov and p
India, there exist ample oppo h as th
economy continues to expend. Paint and coating prices in In
among the lowest in the world, providing opportunities for v
as well, as per capita income and consumer spending in India

SAMPLE TEXT

Architectural markets in India accounted for three-quarters of paint and coatings demand in 2010, the highest level of any major market in the world. This is due primarily to India's immense population and relatively small manufacturing sector compared to other countries. However, India generates a great deal of demand from nonresidential markets as well, a sign of rapid economic and infrastructure development in the country. Repainting or remodeling activities account for about three-quarters of architectural paint demand in India. A majority of interior wall repainting is undertaken during the October-December period of festivities associated with religious events such as Diwali, Eid and Christmas, while exterior repainting is typically done right after the monsoon season each year. As in China, the vast majority of arc
paint demand in India is via the professional sector due to th
of a large and low cost labor force.

Demand for manufacturing coatings in India is limited,
try is not a significant producer of many paint-consuming du
However, India's motor vehicle industry is growing rapidly (

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TABLE VI-8

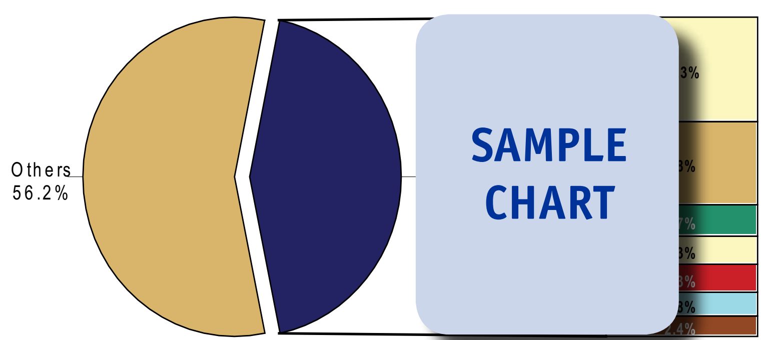
INDIA: PAINT & COATINGS SUPPLY & DEMAND

Item	2000	2005	2010	2015	2020
Population (million persons)					1
$ GDP/capita					0
Gross Domestic Product (bil 2009$)					5
Gross Fixed Capital Formation (bil 20					0
Building Construction Expend (bil 200					0
Manufacturing Value Added (bil 2009$					0
kg paint/capita					1
kg paint/000$ GDP					8
Paint/Coatings Demand (000 metric to					0
+ net exports					0
Paint/Coatings Production (000 m tons)					0

SAMPLE TABLE

CHART VIII-1

WORLD PAINT & COATINGS MARKET SHARE BY COMPANY ($103.1 billion, 2010)



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Sample Profile, Table & Forecast

TABLE VI-6

INDIA: PAINT & COATINGS DEMAND BY MARKET & FORMULATION (thousand metric tons)

Item	2000	2005	2010	2015	2020
Asia/Pacific Paint & Coatings Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% India	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Paint & Coatings Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Market:					
Architectural	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Residential	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Nonresidential	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Manufacturing	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Motor Vehicles	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Maintenance & Specialty	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Formulation:					
Water-Based	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Solvent-Based	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Powder Coatings & Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$/kg	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Paint & Coatings Demand (mil $)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

SAMPLE TABLE

COMPANY PROFILES

Boero Group
Via Macaggi 19
16121 Genoa
Italy
39-10-55
http://ww

Sales: $
Employ

Key Pro ... es

SAMPLE PROFILE

Boero Group is a producer of architectural paint and other coatings. The Company operates through three segments: Architecture and Deco, Yachting, and Marine.

The Company is active in the world paint and coatings industry through the Architecture and Deco segment, which generated sales of $111 million in 2010. The segment manufactures a variety of interior and exterior architectural coatings for the do-it-yourself and professional markets. These products are made and marketed under the BOERO, BOERO GRANDI SUPERFICI, ROVER and ATTIVA brand names by the Company's Boero Bartolomeo SpA subsidiary (Italy). Through these product lines, Boero Bartolomeo produces a range of paint, finishes, enamels and varnishes.

Product offerings from Boero include paints for wood substrates, walls, decorations, glazes and corrosion-prevention. Representative products include GYPSO washable water-based paint for plasterboard; TIARE breathable water-based paint for filling and masking imperfections; LAKISTAR transparent wood finish; and APRILIA enamel solvent interior and exterior paint. Other representative products include

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"Although solvent-based coatings were the leading product type in India in 2010, water-based paints are expected to increase their share of the market, accounting for the majority of demand by 2015. Water-based products will benefit as consumers trade up from low-cost distempers and solvent-based enamel paints to higher cost emulsions. The shift to water-based architectural paints, particularly in new construction, has been supported by the ..."
--Section VI, pg. 155

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Other Studies

Solvents

US solvents demand will continue to rebound from its recessionary lows, rising 1.5 percent per year in volume terms through 2016 to 10.9 billion pounds. Growth in consumer oriented markets and regulations aimed at solvent volatility and toxicity will favor "green" solvents such as butanediol derivatives, terpenes, and alcohols. The construction market will grow the fastest. This study analyzes the 10.1 billion pound US solvent industry, with forecasts for 2016 and 2021 by product and market. The study also evaluates company market share and profiles industry players.

#2925 .... November 2012 .... $4900

World Emulsion Polymers

Global demand for emulsion polymers is forecast to rise 5.1 percent per year to 13.3 million metric tons (dry basis) in 2016. In developing nations such as China and India, demand will benefit from strong economic growth and increased penetration of waterborne technology in the coatings and adhesives industry. This study analyzes the $26.1 billion world emulsion polymer industry, with forecasts for 2016 and 2021 by market, polymer, world region and for 15 major countries. The study also evaluates company market share and profiles industry participants.

#2929 .... August 2012 .... $5900

World Kaolin

The world market for kaolin is projected to grow 3.7 percent per year through 2015 to 28.4 million metric tons. The biggest gains will be in China, which will easily overtake the US to become the world's largest kaolin market. Paper will remain the largest segment while ceramics will grow the fastest. This study analyzes the 24 million metric ton world kaolin industry, with forecasts for 2015 and 2020 by market, world region and for 20 countries. The study also evaluates company market share and profiles industry players.

#2846 .... February 2012 .... $5900

Paint & Coatings

US demand for paint and coatings is forecast to increase 7.8 percent annually through 2015, as the industry continues to favor higher-value formulations to meet increasingly stringent regulations. The large architectural sector will be the fastest growing market, with the interior segment remaining larger and growing faster than its exterior counterpart. This study analyzes the $18 billion US paint and coating industry, with forecasts for 2015 and 2020 by market, formulation and substrate. The study also evaluates company market share and profiles industry players.

#2812 .... November 2011 .... $4900

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

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