
photo: United Soybean Board

World Emulsion Polymers

Industry Study with Forecasts for **2016 & 2021**

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World Emulsion Polymers

Industry Study with Forecasts for ***2016 & 2021***

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Industry Study with Forecasts for ***2016 & 2021***

Advances will be fueled by increased production of water-based paints, coatings, and adhesives, which are displacing solventborne formulations in virtually all parts of the world.

World demand to rise 5.1% annually through 2016

Global demand for emulsion polymers is forecast to rise 5.1 percent per year to 13.3 million metric tons (dry basis) in 2016. Advances will be fueled by increased production of water-based paints, coatings, and adhesives, which are displacing solventborne formulations in virtually all parts of the world. In the developed world, where emulsion polymer markets are more mature, gains will benefit from a rebound in construction spending and manufacturing activity, as well as the adoption of more stringent environmental regulations concerning the emission of volatile organic compounds (VOCs). In developing nations such as China and India, emulsion polymer demand will benefit from strong economic growth and increased penetration of waterborne technology in the coatings and adhesives industries. Emulsion polymer market value is forecast to rise 6.9 percent per year through 2016 to $36.4 billion, benefiting from shifts in product mix toward higher priced emulsions, particularly acrylics.

World Emulsion Polymer Demand
(13.3 million metric tons, 2016)

Paint and coatings market to post most rapid gains

The global emulsion polymers market will remain closely linked to a relatively narrow group of products, most prominently water-based paints, paper and paperboard coatings, and general purpose adhesives. The most rapid gains through 2016 will be for emulsion polymers in paint and coatings, where water-based formulations are steadily increasing their share of the market. Even in industrialized regions such as North America and Western Europe, where water-based paints are dominant in the architectural sector, there remain ample opportunities for emulsion polymers in the industrial and specialty coatings markets. More moderate gains in demand are expected in the adhesives market, where emulsion polymers are facing competition from other low-VOC technologies such as hot melts. Below average advances in emulsion polymer demand are forecast for the highly mature and slow growing paper and paperboard coatings market.

Acrylics to remain largest, fastest growing type

Acrylics will remain the largest and fastest growing emulsion polymer product type through 2016, when they will account for nearly 40 percent of the world market. Demand for acrylics will benefit from rapid growth in the paint and coatings market, where acrylic polymers are valued for their durability and wide range of applications. Vinyl acetate emulsions will also see healthy increases in demand, with the most favorable opportunities expected for vinyl acetate-ethylene (VAE) copolymers in adhesives and coatings applications. The slowest growth among major product types will be for styrene-butadiene latex.

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Sample Text, Table & Chart

TABLE VII-8

INDIA: EMULSION POLYMER DEMAND BY PRODUCT & MARKET (thousand metric tons)

Item	2001	2006	2011	2016	2021
Gross Domestic Product (bil 2010$)					
kg emulsion/mil $ GDP					
Emulsion Polymer Demand					
By Product:					
Acrylics					
Styrene-Butadiene Latex					
Vinyl Acetate Polymers					
Other Emulsion Polymers					
By Market:					
Paint & Coatings					
Paper & Paperboard Coatings					
Adhesives & Carpet Backing					
Other Markets					

SAMPLE TABLE

ASIA/PACIFIC

India: Emulsion Polymer Demand

Demand for emulsion polymers in India totaled 288,000 tons in 2011, the third largest market in the Asia/Pacific regi capita emulsion demand totaled 0.24 kilograms in 2011, a fra global average and by far the lowest of any major world mar is unsurprising, given India's large population, low per capita and low level of industrialization. However, emulsion polym in India rose at a strong pace in recent years -- more than 11 nually from 2006 to 2011 -- fueled by increasing construction and manufacturing activity in the country. The paint and coa accounted for the largest portion of demand in 2011, as India ers are beginning to diversify into waterborne architectural p away from traditional solvent-based formulations and distem coatings and adhesives are also significant emulsions market demand in each rising at a double-digit annual pace during the 2006-2011 period.

Emulsion polymer demand in India is forecast to increase just over 1 0 metric tons, the fastest s robust growth will be fu- ts for emulsions, including luction, paper manufactur- gains will span virtually a the major types exhibiting increases in demand of eight percent annually or more. Acrylics will remain the largest volume product through 2016, accounting for nearly half of total demand, followed by SB latex and vinyl acetate emulsions.

SAMPLE TEXT

Demand for emulsion polymers used in the paint and co tor will rise at the fastest pace of any market in India, growi percent per year through 2016. Because the Indian coatings heavily focused on architectural paints rather than industrial

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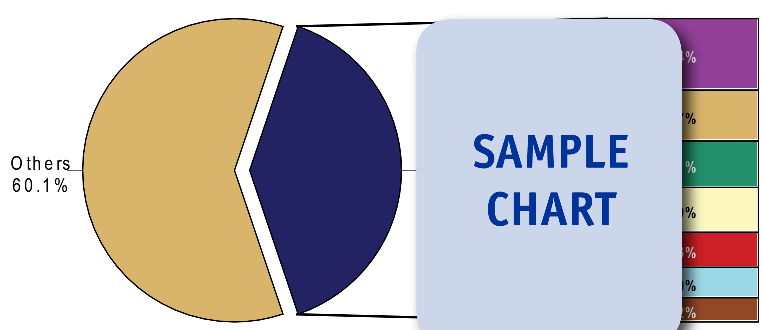
CHART IX-1

WORLD EMULSION POLYMER MARKET SHARE ($26.1 billion, 2011)



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Sample Profile, Table & Forecast

TABLE VII-7

INDIA:
KEY INDICATORS FOR EMULSION POLYMER DEMAND

Item	2001	2006	2011	2016	2021
Population (million persons)					
per capita GDP					
Gross Domestic Product (bil 2010$)					
Manufacturing Value Added (bil 2010$					
Construction Expenditures (bil 2010$)					
Paper & Paperboard Prdn (mil metric t					
kg emulsion/capita					
kg emulsion/mil $ GDP					
kg emulsion/000$ MVA					
Emulsion Polymer Demand (000 m tons)					

SAMPLE TABLE

COMPANY PROFILES

DIC Corporation
DIC Building
7-20, Nihonbashi 3-chome
Chuo-ku
Japan
813-327
http://w

Sales: $
Geograp... apan 42%, US 11%
and Oth
Employ

SAMPLE PROFILE

Key Products: styrene acrylic, acrylic, acrylic silicon, styrene acrylic, acrylic acetate, acrylic urethane, alkyd, melamine, epoxy ester, acrylic silicon, and polysiloxane acrylic emulsions and dispersions

DIC Corporation is a diversified chemicals manufacturer involved in the graphic arts, packaging, electronic, plastic, chemical and related industries. The Company operates in five segments: Printing Inks and Supplies, Neo-Graphic Arts Materials, Synthetic Resins, Chemical Solution Materials, and Others.

The Company competes in the world emulsion polymers industry via the Synthetic Resins segment, which had FY 2012 sales of $1.8 billion. Including eliminations, Japan accounted for 76 percent of the segment's total sales in FY 2012, while other countries accounted for 24 percent. The Synthetic Resins segment comprises operations for the manufacture and sale of an extensive range of synthetic resins, resin related products, polymer additives, and other related products for such applications as coatings, building materials, automobiles, textiles, and electrical and electronics components. Synthetic resins made by the Company include GRANDOLL and VONCOAT emulsions, and

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"Paper coatings and adhesives markets will also offer extremely favorable opportunities for emulsion polymer suppliers in India. In paper coatings, emulsion demand will be driven by rising production of higher quality coated printing paper and paperboard. In fact, by 2016 India is expected to pass South Korea and Indonesia as Asia's third largest manufacturer of paper and paperboard (and fifth largest worldwide)."

--Section VII, pg. 175-6

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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 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

World Paint & Coatings

Global paint and coatings demand will rise 5.4 percent annually to 45.6 million metric tons in 2015. The Asia/Pacific region will remain the largest market and will grow the fastest. The key architectural segment will lead gains worldwide. High-solids formulations will continue gaining market share on solvent-based types. This study analyzes the 35 million metric ton world paint and coatings industry, with forecasts for 2015 and 2020 by formulation, market, world region and for 23 countries. The study also evaluates company market share and profiles industry participants.

#2845 .... February 2012 .... $6100

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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