

Global Emulsion Polymers Market

Industry Study with Forecasts for 2020 & 2025

Study #3461 | November 2016 | \$6300



Emulsion suppliers stand to benefit from robust growth in the output of higher quality coatings, paper, and adhesives, particularly in the quickly expanding manufacturing centers of Southeast Asia. Worldwide, the ongoing displacement of solventborne coatings and adhesives with environmentally friendly water-based types -- which are manufactured using emulsion polymers -- will continue to spur sales. Water-based coatings and adhesives are seeing growing adoption, especially in industrial and specialty applications, as enhanced formulations are better able to compete with their solventborne counterparts.

China shapes global trends

Performance in the massive Chinese market -- which is forecast to account for more than one-fourth of global sales in 2020 -- will continue to shape worldwide demand trends. While a significant deceleration in manufacturing output is expected to dampen the outlook in China, strong increases in domestic production of low-VOC paints and coatings will bolster upstream demand for acrylics and other emulsion polymers.

India forecast to see fastest growth

The fastest gains in the Asia/Pacific region are projected for India, fueled by particularly strong growth in production of water-based architectural paint as household incomes rise and consumers trade up from lower priced coatings. Rapid market expansion is also forecast for Malaysia, where local production of synthetic rubber

gloves, and the related usage of acrylonitrile latex, is set to continue its rapid ascent.

Acrylic-based emulsions to remain largest & fastest growing product

Acrylic-based emulsions will remain the largest and fastest growing single product type through 2020, driven by rising usage in paint and coatings, where acrylics are valued for their durability and wide range of applications. Sales gains for vinyl acetate emulsions will approximate the average, bolstered by increased output of water-based adhesives worldwide. While styrene-butadiene latex, demand is projected to slightly accelerate going forward, relatively weak growth in the output of coated paper and tufted carpeting will stymie stronger advances.

Study coverage

This Freedonia study details the global emulsion polymers market, which in 2015 totaled 10.2 million metric tons (\$27.5 billion). It presents historical demand data (2005, 2010, 2015) plus forecasts (2020 and 2025) by product (acrylic, styrene-butadiene latex, vinyl acetate polymers) and market (paint and coatings, paper and paperboard coatings, adhesives, carpet backing) for 16 major countries in 6 world regions. In addition, the study provides company market shares and competitive analysis on industry players such as Arkema, BASF, Celanese, Dow Chemical, DIC, DSM, OMNOVA Solutions, Synthomer, Trinseo, and Wacker Chemie.

Industry Study with historical data for 2005,
2010 & 2015 plus forecasts for 2020 & 2025

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Canada: Products & Markets Outlook

Demand for emulsion polymers in Canada is forecast to grow through 2020, underperforming the global market. The country's leading outlet for emulsion polymers is in the construction sector, with a particular concentration in building materials. The automotive sector is also expected to continue to be a significant industrial sector for emulsion polymers, particularly in solvent-based coatings.

Canada is also expected to remain a substantial net exporter of manufactured goods -- including in the boxboard and sensitive food sector -- will continue to bolster the production of pressure sensitive tapes and other labels, boosting the use of vinyl acetate polymers and other emulsion types. The paper coatings market for emulsion polymers, on the other hand, is forecast to remain flat going forward, restrained by structural weakness in the country's coated paper sector.

Carpet backing adhesives are a smaller volume, though still important, outlet for emulsion polymers in Canada. In 2015, Canada ranked among the world's top 10 manufacturers of tufted carpets and rugs, and the country is expected to see output growth accelerate as construction activity expands.

Acrylics are projected to remain the top product segment in Canada through 2020, accounting for over one-third of all sales based on their widespread usage in paint and coatings applications. The fastest annual gains are expected for vinyl acetate polymer-based formulations, driven by above average growth in the general purpose adhesives market.

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

Item	2005	2010	2015	2020	2025
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					

Source: The Freedonia Group

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GERMANY: EMULSION POLYMER SUPPLY & DEMAND (thousand metric tons)

Item	2005	2010	2015	2020	2025
Population (million persons)					
per capita GDP					
Gross Domestic Product (bil 2014\$)					
Manufacturing Value Added (bil 2014\$)					
Building Construction Expend (bil 2014\$)					
kg emulsion/capita					
kg emulsion/mil \$ GDP					
kg emulsion/000\$ MVA					
Emulsion Polymer Demand					
net exports					
Emulsion Polymer Production					

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

Related Studies

World Adhesives & Sealants

Global demand for adhesives and sealants is forecast to rise 4.5 percent per year through 2019 to 20.2 million metric tons, valued at \$64 billion. Packaging will remain the leading outlet, while construction will capture increased share. Reactive adhesives and sealants will be the fastest growing products. This study analyzes the 16.1 million metric ton world adhesives and sealants industry, with forecasts for 2019 and 2024 by product and market for six world regions and 18 major countries. The study also evaluates company market share and profiles industry players.

#3377..... *January 2016* \$6300

Paint & Coatings

US demand for paint and coatings is forecast to grow 3.8 percent annually to 1.4 billion gallons in 2019. Architecture will remain the largest market and grow the fastest. Water-based formulations will remain dominant and continue to gain market share. New technologies such as nanostructured coatings will drive future growth. This study analyzes the 1.2 billion gallon US paint and coatings industry, with forecasts for 2019 and 2024 by market, formulation and substrate. The study also evaluates company market share and profiles industry players.

#3317..... *August 2015* \$5300

World Dyes & Organic Pigments

World dye and organic pigment demand will rise 6.0 percent yearly to \$19.5 billion in 2019. The Asia/Pacific market will remain dominant and will grow the fastest. The smaller organic pigments segment will outpace dyes due to increased use of high performance pigments in paints and coatings and plastics applications. This study analyzes the \$14.5 billion world dye and organic pigment industry, with forecasts for 2019 and 2024 by product, market, world region, and for 19 countries. The study also evaluates company market share and profiles industry players.

#3264..... *April 2015* \$6300

Adhesives & Sealants

US demand for adhesives and sealants is forecast to increase 2.8 percent per year to 6.4 billion pounds in 2019, valued at \$12.8 billion. Reactive adhesives and sealants will be the fastest growing types. The construction market will lead gains, while the manufacturing and assembly market will remain the largest segment. This study analyzes the 5.6 billion pound US adhesives and sealants industry, with forecasts for 2019 and 2024 by product and market. The study also evaluates company market share and profiles industry players.

#3257..... *February 2015* \$5400

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Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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