

# Manufacturing (OEM) Coatings Market in the US

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Industry Study with Forecasts for 2020 & 2025

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A number of factors will provide growth opportunities for the manufacturing coatings industry. The ongoing rebound in construction activity will spur demand for coatings in markets such as metal building products, furniture, and prefinished wood products. Environmentally friendly coatings will continue to exhibit particularly strong growth as manufacturers develop new products to meet stricter government regulations and changing consumer tastes. Additionally, new technological advances, such as nanostructured and smart coatings, will drive future growth as they open new applications.

## Packaging market to register most rapid growth

Packaging will experience the fastest growth due to an increase in the production of metal packaging products, which account for the majority of packaging coatings demand. The automotive OEM market will continue to account for the largest share of manufacturing coatings, although demand will grow at a rate below the overall manufacturing market average through 2020. Additionally, gains in the automotive OEM market will be hampered by improving processes that reduce the amount of coating needed per vehicle.

Other markets for manufacturing coatings include furniture and fixtures, machinery, and metal building components. A shift toward the making of high-end furniture in

the US will provide some support for furniture coatings demand. However, the transfer of production processes to countries with low labor costs and the heightened usage of plastic components in many furniture and fixture products will limit demand growth in the US.

## Powder coatings to see rapid gains

Usage of powder coatings will rise at an above average pace due to its efficiency and cost-effectiveness, while solvent-based coatings will continue to lose share due to environmental regulations. Water-based coatings will still account for the largest share of manufacturing coatings.

## Study coverage

This Freedonia study analyzes the \$8.8 billion US manufacturing (OEM) coatings market. It offers historical demand data (2005, 2010, and 2015) plus forecasts (2020 and 2025) by market (furniture and fixtures, metal building components, motor vehicle [automotive OEM], machinery, packaging, appliances, aerospace and other transportation equipment, fabricated metal products, and other manufacturing). The study also examines key market environment factors, assesses the industry structure, and analyzes company market share and industry competitors including PPG Industries, Sherwin-Williams, Valspar, RPM International, Akzo Nobel, Axalta Coating Systems, and BASF.

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### MANUFACTURING COATINGS MARKETS

#### Furniture & Fixtures: Coatings Demand

Demand for coatings used in the manufacture of furniture and fixtures is expected to decline slightly over the forecast period. This is due to a combination of factors, including a decline in new residential construction, a shift in the furniture industry toward offshore sourcing of various products, particularly wood furniture, a deceleration in domestic furniture shipments, and more stringent environmental regulation.

Wood furniture and fixture coatings will continue to account for a significant share of manufacturing coatings demand through 2020 and beyond. This segment is forecast to outpace the overall growth in the manufacturing sector over the forecast period due to wood capturing a larger share of overall furniture shipments. However, overall advancement for furniture and fixture coatings will be restricted by a shift in the furniture industry toward offshore sourcing of various products, particularly wood furniture, a deceleration in domestic furniture shipments, and more stringent environmental regulation.

A number of coating technologies, including powder coatings, polyurethanes, and radiation curable coatings, will gain use in furniture and fixture applications. Powder coatings will continue to find favor based on their status as being more environmentally friendly than alternatives. In addition, demand for these coatings will also benefit from their superior application efficiency, particularly when they are used to coat large or complex metal parts. Water-based polyurethanes and radiation curable coatings are also anticipated to gain more widespread usage due to their superior application efficiency, particularly when they are used to coat large or complex metal parts.

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### 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

TABLE IV-1

#### MANUFACTURING COATINGS DEMAND BY MARKET (million gallons)

Item	2005	2010	2015	2020	2025
Manufacturers' Shipments (bil 2009\$)					
gallons/mil \$ mfg					
Manufacturing Coatings Demand					
Motor Vehicles					
Furniture & Fixtures					
Packaging					
Metal Building Components					
Machinery					
Fabricated Metal Products					
Aerospace & Other Transportation					
Appliances					
Other					

Source: The Freedonia Group

TABLE III-5

#### SELECTED MANUFACTURING COATINGS PRICES (dollars per gallon)

Item	2005	2010	2015	2020	2025
Manufacturing Coatings					
Furniture & Fixtures					
Motor Vehicles					
Packaging					
Metal Building Components					
Machinery					
Fabricated Metal Products					
Aerospace & Other Transportation					
Appliances					

Source: The Freedonia Group

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## Related Studies

### Global Emulsion Polymers Market

Global emulsion polymers demand is forecast to rise 4.2 percent yearly through 2020 to \$14.2 billion. While China continues to dominate global demand, the fastest gains in the Asia/Pacific region will be in India. The paint and coatings and the adhesives markets will post the fastest yearly gains of all major outlets. This study presents forecasts (2020, 2025) for supply and demand, plus demand by market and product, in 6 regions and 16 countries. The study also reviews market environment factors, assesses the industry structure and evaluates company market share.

#3461..... November 2016 ..... \$6300

### World Paint & Coatings

World demand for paint and coatings is projected to increase 3.7 percent per year to 54.7 million metric tons in 2020. The best growth opportunities will occur in India, where paint use will be spurred by rapidly expanding investment to build and update homes, businesses and industrial facilities. The study details the 45.5 million metric ton paint and coatings market, giving forecasts for 2020 and 2025 for supply and demand, plus demand by market and formulation, in 6 regions and 23 countries. The study also evaluates company market share and profiles world participants.

#3418..... June 2016 ..... \$6200

### 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

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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

## About The Freedonia Group

The Freedonia Group is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States and other world markets. Industries analyzed by Freedonia include:

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