

Architectural Paint Market in the US

Industry Study with Forecasts for 2020

Study #3493 | February 2017 | \$4900



Demand for architectural paint in the US will be fueled by healthy gains in residential building construction. Efforts to offset intense competition and market maturity -- such as with new product development, distribution partnerships, and acquisition activity -- will remain central growth strategies going forward.

New housing growth, improvement & repair activity to drive demand

The new residential market for architectural paint will see the fastest growth of any outlet through 2020, as home building activity continues to rebound strongly from the depths of the housing crisis. However, most demand gains will derive from the residential improvement and repair market. Growth in this segment will be supported by increases in existing home sales, as residences are often repainted twice when they change hands, once by the seller and again by the new homeowner.

Shift from reducing solvents to improving latex performance key

Interior water-based paint offers the best opportunities for growth through 2020. Simple soap-and-water cleanup and low odor make latex formulations particularly well-suited for indoor repainting projects, enabling fast project completion with minimal disruption to daily activities.

While water-based paints will continue to gain market share from solvent-based types, much of this transition

has already taken place. Further gains will depend on the extent to which producers can meet consumer demand for more durable, easy-to-use paints with properties like one coat coverage and scratch, stain and scrub resistance.

Competition still negatively affects business for independent distributors

Independent distributors' share of the market has contracted over the last few decades due to the rapid expansion of company-owned stores and home centers. Going forward, paint manufacturers are expected to capitalize on growth in the professional segment by opening more stores and launching new products and services for contractors in home centers, forcing independent distributors to compete more rigorously for their primary customers.

Study coverage

This Freedonia industry study analyzes the \$11 billion US architectural paint market. It presents historical demand data for 2005, 2010, and 2015 plus forecasts for 2020 by market (residential and nonresidential building construction), product (interior and exterior paint, water- and solvent-based formulations, substrate-specific paint), end user (professional, DIY/consumer), and distribution channel (company-owned stores, home centers and mass merchants, independent distributors). In addition, the study evaluates company market share and provides competitive analysis on key players, including Masco, PPG, Sherwin-Williams, and Valspar.

OVERVIEW

Environmental & Regulatory Considerations

Environmental regulations in the architectural paint industry span a wide range of materials to improve the durability of the paint.

Regulatory changes are focused primarily on lowering VOC levels in architectural paints with water-based alternatives as already taken. The architectural paint industry then, voluntary efficiency and ensure -- like in paint sustainability from cradle to grave -- will play more important in determining new paint functions and formulations.

VOC Regulations

VOC regulations in the US consist of the EPA's Architectural and Industrial Maintenance (AIM) Coatings rule under the Clean Air Act, as well as several state-level consortiums that have established strict controls, including the California Air Resources Board (CARB), the Ozone Transport Commission (OTC), and the Lake Michigan Air Directors Consortium (LADCO).

State regulations remain inconsistent even within these organizations, as not every member state adopts the standards of the larger body. In California, VOC regulations can differ from county to county. California's South Coast Air Quality Management District (SCAQMD) has the most stringent VOC regulations in the US and is the only organization to restrict VOCs in paint colorants.

The complexity of the regulatory landscape has driven VOC levels lower and encouraged the development of zero-VOC products to reduce supply chain costs and stay ahead of the possibility of further VOC reductions.

©2017 The Freedonia Group. All rights reserved.

Table 3-2 | Residential Building Construction Markets for Architectural Paint, 2005 - 2020 (million gallons)

Item	2005	2010	2015	2020
Residential Construction Markets				
By Project:				
New Construction				
Improvement & Repair				
By Application:				
Interior				
Exterior				
% residential Architectural Paint Demand				

Source: The Freedonia Group

Table 2-3 | Selected Architectural Paint Prices, 2005 - 2020 (dollars per gallon)

Item	2005	2010	2015	2020
Architectural Market Average				
By Application				
Interior				
Exterior				
By End User				
Professional				
DIY/Consumer				
By Distribution Channel				
Company-Owned Store				
Home Center & Mass Merchant				
Independent Dealer & Other				

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

The Freedonia Group

Upcoming Research for 2017

Freedonia's **KNOWLEDGE CENTER** offers a state-of-the-art **Subscriber Portal** that delivers powerful ROI while saving your organization countless hours of research.

Construction and Building Products

New Titles

- Kitchen & Bath Remodeling in the US
- Roofing Distribution in the US
- Siding Distribution in the US
- Portable HVAC Equipment in the US
- Asphalt Shingles Market in the US

Updates

- Global Countertops Market
- Global Flooring Market
- Pipe Markets in the US
- Plumbing Fixtures & Fittings in the US
- Siding Market in the US
- Windows & Doors Market in the US
- Global Elevators

Packaging and Consumer Goods

New Titles

- Global E-Commerce
- Packaging Films Market in the US
- Consumer Wipes Market in the US
- Meat Packaging Market in the US
- Poultry Packaging in the US

Updates

- Foodservice Disposables in the US
- Global Caps & Closures
- Labels in the US
- Global Power Tools
- Home Organization Products in the US

Chemicals, Polymers, Energy

Updates

- Global Activated Carbon
- Global Lubricants
- Global Architectural Paint
- Oilfield Chemicals Market in the US
- Proppants Market in the US
- Roofing Coatings Market in the US

Industrial Equipment and Transport

Updates

- Global Construction Machinery
- HVAC Equipment in the US
- Lawn & Garden Equipment in the US
- Global Buses
- North American Automotive Aftermarket
- North American Truck Aftermarket

Related Studies

Protective & Specialty Coatings Market in the US

US demand for protective and specialty coatings will rise 1.1 percent per year to 180 million gallons in 2020. The industrial maintenance market will see the fastest gains in demand, while the automotive refinish market will continue to account for a significant share of the overall market. By 2020, volume demand for water-based coatings will surpass demand for solventborne formulations. The study offers historical demand data plus forecasts for 2020 and 2025 by type and market. The study also reviews industry structure and evaluates company market share.

#3496..... December 2016 \$4900

Manufacturing (OEM) Coatings Market in the US

Demand in the US for manufacturing (OEM) coatings is forecast to reach 379 million gallons in 2020, on annual gains of 1.4 percent. Packaging will post the fastest growth in the manufacturing segment based on an increase in the production of metal packaging products. Water-based coatings will still account for the largest share of manufacturing coatings. This study presents forecasts (2020, 2025) for coating types and markets. The study also reviews market environment factors, analyzes the industry structure and evaluates company market share.

#3492..... December 2016 \$4900

World Paint & Coatings

World demand for paint and coatings is projected to rise 3.7 percent per year to 54.7 million metric tons in 2020. The best growth opportunities will be in India, where paint use will be fueled by rapidly expanding investment to build and update homes, businesses and industrial facilities. The study assesses 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 global industry participants.

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

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

Contact Freedonia

1.800.927.5900 (US & Canada)

+1 440.684.9600 (Int'l)

email: info@freedoniagroup.com

website: freedoniagroup.com

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:

Automotive & Transport • Chemicals • Construction & Building Products • Consumer Goods • Energy & Petroleum • Industrial Components • Healthcare & Life Sciences • Machinery & Equipment • Metals, Minerals & Glass • Packaging • Plastics & Other Polymers • Security • Services • Textiles & Nonwovens • Water Treatment

The Freedonia Group is a division of MarketResearch.com

About MarketResearch.com

With offices in London, New York City, and Washington D.C., MarketResearch.com is the leading provider of global market intelligence products and services. With research reports from more than 720 top consulting and advisory firms, MarketResearch.com offers instant online access to the world's most extensive database of expert insights on industries, companies, products, and trends.



[Click here to purchase study online](#)