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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.
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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.
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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.
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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.
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Paint & Coatings: US Market Forecasts

Historical data plus forecasts for 2020

#3500 | February 2017 | \$4900



US demand for paint and coatings in the forecast period will be driven by the ongoing recovery of the residential construction industry. Additions to the industrial building stock and increased highway maintenance expenditures will also boost sales. However, a slowdown in manufacturing activity and the development of more durable architectural and manufacturing (OEM) coatings will restrict gains going forward.

Architectural paints to drive gains

Demand for architectural paint will outpace both manufacturing (OEM) and protective and specialty coatings over the forecast period. Architectural markets will benefit from the ongoing recovery of the construction industry. Demand for residential paint will exceed that of the nonresidential sector, spurred by strong growth in new housing construction and rising improvement and repair activity.

Water-based paint & coatings to grow faster than all other types

Stringent limitations on VOCs will be the primary driver of the shift from solvent-based paint and coatings to water-based formulations, particularly in manufacturing and protective and specialty markets. Much of this transition has already taken place in the architectural market. In addition, consumer preferences for more environmentally friendly products will stimulate sales of waterborne paint and coatings.

Consolidation activity to continue

Acquisition will remain a central growth strategy going forward as US paint and coatings suppliers attempt to stave off high competition and market maturity. In March 2016, Sherwin-Williams agreed to acquire Valspar. The acquisition will result in the world's largest paint and coatings manufacturer, surpassing PPG Industries. In addition, in December 2016, Akzo Nobel (Netherlands) acquired BASF's (Germany) Industrial Coatings business, and Nippon Paint (Japan) agreed to purchase US-based Dunn-Edwards. Akzo Nobel's acquisition of BASF's industrial coatings will expand Akzo Nobel's customer base worldwide and strengthen its coil coatings business, while Nippon Paint's merger agreement with Dunn-Edwards affords one of the world's largest paint and coatings suppliers access to the US architectural paint market.

Coverage

Paint & Coatings presents historical demand data (2005, 2010, 2015) plus forecasts for 2020 by market (architectural paint, manufacturing (OEM) coatings, protective and specialty coatings), formulation (water-based, solvent-based, powder, and radiation curable coatings), and substrate (drywall and plaster, metal, and wood). The brief also details company market share and provides competitive analysis on industry participants including Akzo Nobel, Axalta Coating Systems, Masco, PPG Industries, Sherwin-Williams, and Valspar.

Table 6-8 | Construction Expenditures, 2005 - 2020
(billion 2009 dollars)

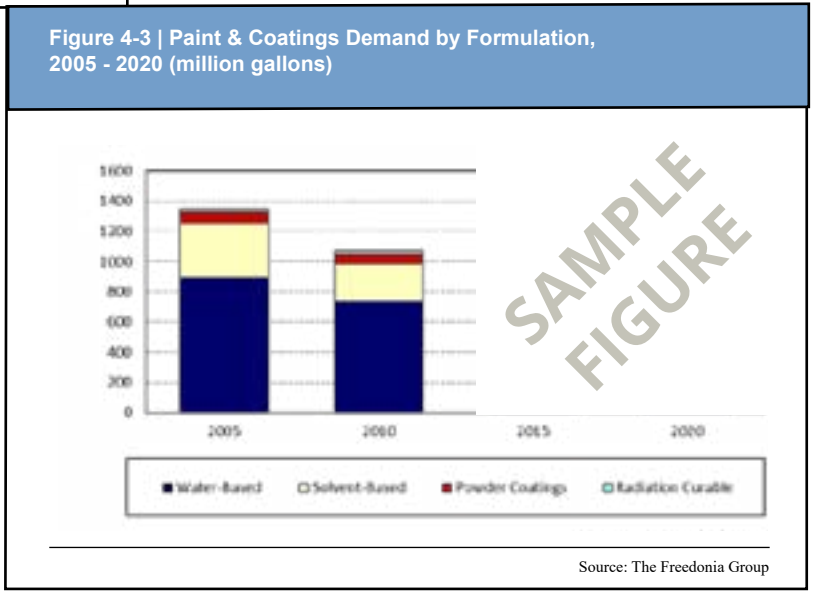
Item	2011	2016	2021	2026
Construction Expenditures				
Building Construction:				
Residential				
Nonresidential				
Nonbuilding Construction				
price deflator (2009=100)				
Construction Expenditures (bil \$)				

Source: The Freedonia Group

Table 4-2 | Paint & Coatings Demand by Substrate, 2005 - 2020
(million gallons)

Item	2011	2016	2021	2026
Paint & Coatings Demand				
Drywall & Plaster				
Metal				
Wood				
Other				

Source: The Freedonia Group



MARKETS

Building Construction Trends Drive Paint Demand

Architectural paint demand is driven primarily by building construction spending. The market was greatly impacted by the volatility of the construction industry over the 2005-2015 decade.

- New housing construction began to fall sharply after 2005, and reached its nadir from 2009 to 2011. Residential I&R spending was less steep than that of nonresidential construction, which helped to sustain the market.
- Additionally, nonresidential construction spending during most of the decade was cost-effective, leading to improvements in building activity.
- Both new housing and residential I&R spending began to recover in 2012 and 2013, and that recovery is expected to continue through 2020.
- Nonresidential construction spending -- which accounts for approximately one-sixth of paint demand -- rose through 2008, then fell sharply in 2009 and 2010 as the effects of the economic recession took hold.
- Nonresidential building activity rebounded strongly from 2013 to 2015, but gains will lag residential construction spending through 2020.

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