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*Worldwide*

World demand for paint and coatings is projected to rise 3.7 percent per year to $47.4 billion in 2020. The best growth opportunities will be in India, where paint use will be fueled by rapidly expanding investment to build up and improve 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 45 regions and countries. The study also evaluates company market share and profiles global industry participants.

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**Paint & Coatings**

*US Market Forecasts*

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 nano-engineered 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 type, 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*

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**About the Forecast**

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.

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Paint & Coatings: US Market Forecasts

Historical data through 2016 with forecasts for 2021

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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 in the construction industry over the 2005-2015 decade.

• New housing construction began to fall sharply after 2005, and was at its nadir from 2009 to 2011.
• Residential I&R activity fell after 2005, but the drop was less steep than that of new housing. Because repainting projects account for the majority of architectural paint demand, this helped to sustain the market.
• Additionally, during most of the housing downturn, repainting activity outpaced residential I&R spending, since repainting is a cost-effective way to improve a property.
• 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 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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