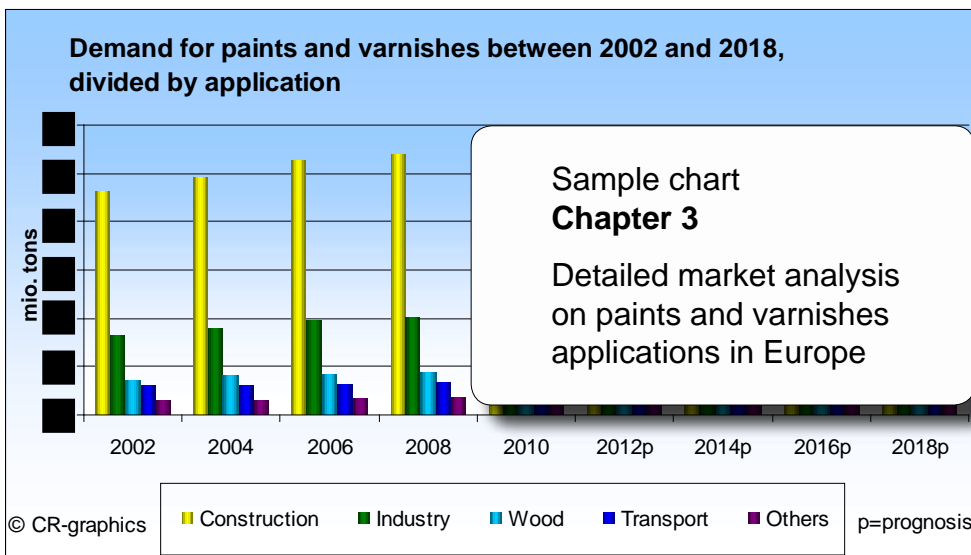


# Market Study: Paints and Varnishes



**Ceresana  
Research**

# Market Study: Paints and Varnishes



The market research institute Ceresana Research expects that the European paint and varnish market will generate revenue of €27.7 billion by 2018. Germany is the largest sales market in Europe with a roughly 15% share, followed by Italy and Russia.

Demand for industrial varnishes, the second-largest field of application behind the construction industry, is especially increasing in Russia, Poland, and Turkey. But also some West European countries, like the Netherlands, record above European average growth, which amounts to 1.6% per year. Powder coatings, acryl varnishes, and epoxy-based products are increasingly used as industrial varnishes.

Paints and varnishes for wood applications represented the third-largest market in 2010. Italy accounts for almost one-quarter of European demand for wood paints. Ceresana Research assumes that especially water varnishes based on acrylates and polyurethane will see increases in sales in the field of wood processing.

When it comes to the transport industry, revenues from car series paints, refinish coatings, and ship paints are anticipated to increase above-average. Although this sector accounts for less than 8% of the entire paint and varnish market, its share in terms of value totals almost 15%.

The construction industry's influence on the paint and varnish market continues to decline. While the construction industry accounted for approx. 59% of European demand in 2002, this share is expected to drop to 56% by 2018. However, this trend is weakened by rising sales of dispersion paints in Eastern Europe.

In order to meet the trend towards eco-friendliness, many manufacturers develop solvent-free and environmentally-friendly paints and varnishes that are for example suitable for steel containers or internal coatings. This allows to reduce environmental pollution by VOC emissions. A great number of companies are working on product solutions, which offer special properties: apart from heat insulation, especially nanotechnology is a topic of the future, e.g. when it comes to self-cleaning or antibacterial coatings.

## The Study in Brief:

**Vol. I / Chapter 1:** A short and concise overview of the most essential information on the different types of paints and varnishes, their constituents and production, environmental and health issues, fields of application, and legal situation.

**Chapter 2:** 30 European countries are analyzed in detail: Demand and production are evaluated, just as revenue, import, and export. In addition, the report offers a comprehensive insight into market dynamics, innovations, and trends.

**Chapter 3:** The sales markets of paints and varnishes are analyzed extensively: valuable data and influential factors on demand development. Moreover, demand is described and analyzed in depth. Fields of application covered include: construction industry, wood processing, general industry, and transport industry. Other applications include paints for plastics, corrosion protection varnishes as well as ceramics and glass coatings.

**Vol. II / Chapter 4** is a useful list of 138 profiles of paint and varnish manufacturers. Profiles are clearly arranged according to contact details, product range, production sites, short profile, types of paints, surfaces, and application areas as well as individual types of paints and varnishes, their fields of application, and trade names.

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smear-resistant, do quickly absorb water, and are sensitive to discoloration. In addition, they cannot be applied when exposed to the sun, and cannot bond at temperatures below 4°C. That is why lime paints have been replaced almost completely by dispersion paints in construction. The cheap, disinfecting, and anti-fungal lime paints are still needed for agricultural buildings and renovation purposes, e.g., of historical churches.

**Nanocoatings**

Nanotechnology opens up new possibilities to change the properties of materials. Due to the materials that are hard and elastic at the nanometer (10<sup>-9</sup> m) is one billionth of a meter, thinner than a human hair.

Industrial nations invest large sums in nanotechnology because it is considered to be a promising area. Nanoparticles are already a part of many products, titanium dioxide particles as UV absorbers and as biomarkers.

The properties of nanoparticles are above all determined by the surface. When coatings are polished, nanoparticles may provide better surface qualities and reduce waste. Moreover, nanoparticles can be dispersed in varnish systems and change their application characteristics. Due to their size, they remain invisible (e.g., in scratch-proof coatings for lenses).

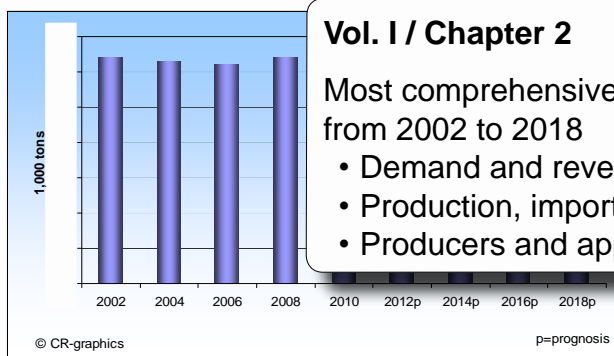
Nanoparticles have been used on facades for several years. These include photocatalytically active titanium dioxide nanoparticles (Nano-TiO<sub>2</sub>) and nanosilver. These particles are supposed to complement or replace biocides, i.e., fight against algae and fungi. For example, walls of hospitals, medical offices, and freezer interiors are coated with silver particles in order to avoid bacteria and other germs. Photocatalytical TiO<sub>2</sub> particles remove organic pollutants and dirt. Easy to clean or self-cleaning surfaces use the lotus effect. Effect coatings and highly scratch-resistant

**Vol. I / Chapter 1**

Concise information on types and product groups, constituents of paints and varnishes, manufacturing and processing of paints, fields of application as well as environment, health, and legal Situation.

**2.27.2 Production, Import, and Export – Switzerland**

Production declined by X% per year between 2002 and 2010 and amounted to X tonnes at the end of this time (Graph). We anticipate manufacturing in Switzerland will decrease by X% per year over the next eight years, resulting in a production volume of somewhat less than X tonnes of paints and varnishes in 2018.



Graph: Production of paints and varnishes in Switzerland from 2002 until 2018

**Vol. I / Chapter 2**

Most comprehensive market data from 2002 to 2018

- Demand and revenue
- Production, import, and export
- Producers and applications

Company	Cars	Rail Vehicles	Agricultural Machinery	Construction Vehicles	Facade Paints	Indoor Paints	Industrial Facilities	Furniture	Craft/Trade	Industry	Marine	Others
xxx					x		x	x		x		vehicle interior, road marking, ski and boards, domestic and electric appliances
xxx					x	x			x			
...												
xxx					x	x	x		x	x		decorative effects

Table: Swiss manufacturers of paints and varnishes and their applications

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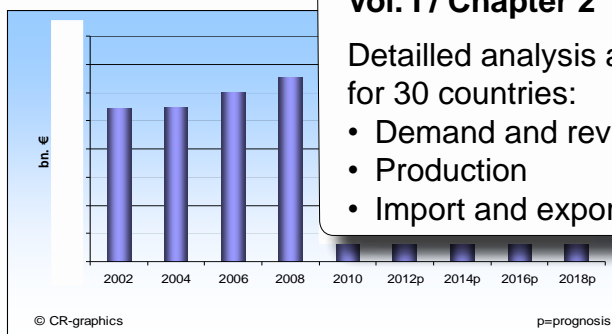
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**2.28.1 Demand and Revenue – The Netherlands**

Demand for paints and varnishes in the Netherlands totaled X tonnes in the year 2010. The construction industry was by far the most important buyer of paints and varnishes in the Netherlands during 2010. It accounted for more than X% of all demand (Table). Revenue from paints and varnishes in the Netherlands rose from €X billion in 2002 to €X billion in 2010 (Graph).



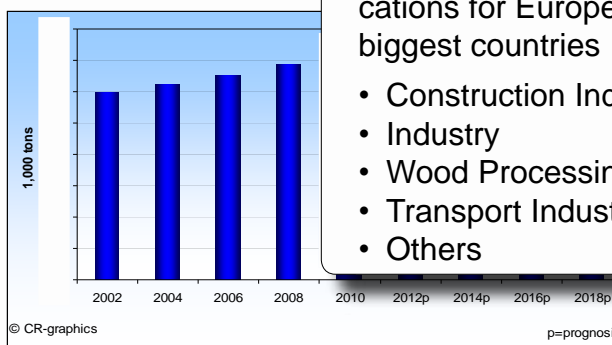
Graph: Revenues from paints and varnishes in the Netherlands from 2002 to 2018 in billions of €

in 1,000 tonnes	2002	2004	2006	2008	2010	2012p	2014p	2016p	2018p
Construction	X	X	X	X	X	X	X	X	X
Industry	X	X	X	X	X	X	X	X	X
Wood Processing	X	X	X	X	X	X	X	X	X
Transport	X	X	X	X	X	X	X	X	X
Others	X	X	X	X	X	X	X	X	X
<b>Total</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>

Table: Demand for paints and varnishes in the Netherlands between 2002 and 2018, divided by application

**3.4 Transport Industry – Europe**

Demand for paints and varnishes in the transport industry rose at an average of X% per year during the past eight years and totaled approx. X tonnes in 2010 (Graph). Serial painting of utility vehicles was the most important sub-market. More than X tonnes of paints and varnishes were used in this segment. About X tonnes were used for repair and maintenance. Ship paints cor a market volume of approx. X tonnes. Wes all demand for paints in the transport indust



Graph: Demand for paints and varnishes in the transport industry from 2002 to 2018

Region	2002	2004	2006	2008	2010	2012p	2014p	2016p	2018p
France	X	X	X	X	X	X	X	X	X
Germany	X	X	X	X	X	X	X	X	X
...	X	X	X	X	X	X	X	X	X
<b>Total</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>

Table: Demand for paints and varnishes in the transport industry, divided by region, in 1,000 tonnes



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Detailed profiles offer you precise facts about producers as well as useful information on applications, characteristics and demand of the most important products.

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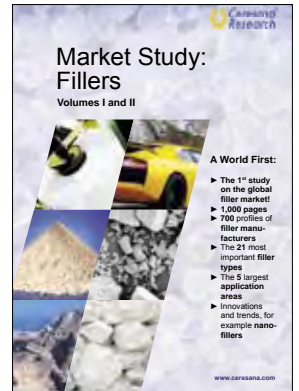
Our studies are clearly structured and the valuable data is illustrated by tables and graphs. The convenient studies offer you all essential information at a glance.

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**This study is especially useful for:**

- Producers, traders and clients of paints and coatings for the construction industry, industrial applications, wood processing, transport industry: Dispersion paints, interior wall and facade paints, coatings for plastics, metal, wood, concrete, machines, metal packaging, furniture, parquet, OEM, refinish and corrosion coatings.
- Suppliers of pre-products, such as alkyd, polyester, nitrocellulose, PVA, epoxy, PUR, acrylate, silicone, solvents, pigments, fillers, plasticizers.
- Plant and mechanical engineers
- Investors and analysts
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**Plasticisers**

69 Products; 145 Producers; 273 Pages, 19 Graphs, 18 Tables; 08/05

**Solvents**

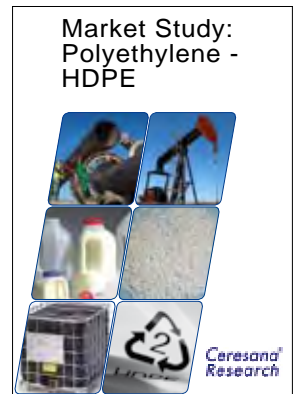
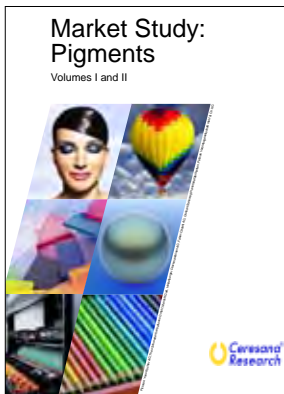
77 Products; 270 Producers; 452 Pages, 80 Graphs, 8 Tables; 01/06

**Flame Retardants**

44 Products; 241 Producers; 627 Pages, 82 Graphs, 33 Tables; 07/06

**Fillers**

21 Products; 702 Producers; 2 Vol., 1,074 P., 88 Graphs, 28 Tables; 07/07



**Pigments**

300 Products; 250 Producers; 2 Vol., 1,154 P., 53 Graphs, 56 Tables; 12/07

**Antioxidants**

90 Products; 68 Producers; 505 Pages, 53 Graphs, 3 Tables; 04/08

**Polypropylene**

64 Countries; 101 Producers; 2 Vol., 1,030 P., 313 Graphs, 118 Tables; 06/08

**Polyethylene - HDPE**

65 Countries, 100 Producers; 2 Vol., 994 P., 285 Graphs, 99 Tables; 09/08

## About Ceresana Research

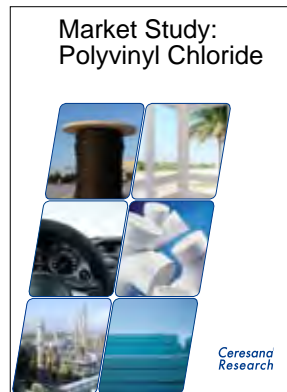
We are one of the world's leading market research institutions. In addition to multi-client studies, we also offer commissioned studies according to an individual client's specifications.

Our core competencies include: Chemicals, plastics, additives, commodities, industrial components, packaging, and construction materials.

Companies, institutions, and associations from more than 45 countries have already profited from our global market data and prognoses.

## Up-to-date Studies

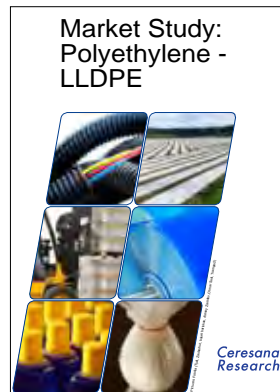
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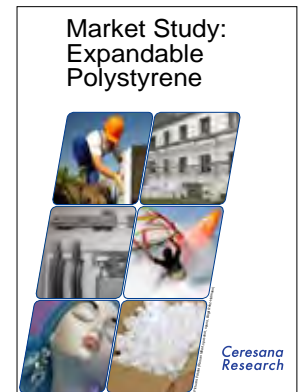
**Polyvinyl Chloride**  
61 Countries, 122 Producers; 2 Vol., 977 P., 364 Graphs, 108 Tables; 11/08



**Bioplastics**  
7 Countries; 12 Products, 77 Producers; 400 P., 80 Graphs, 32 Tables; 06/09



**Polyethylene - LLDPE**  
67 Countries, 80 Producers; 2 Vol., 830 P., 305 Graphs, 100 Tables; 03/10



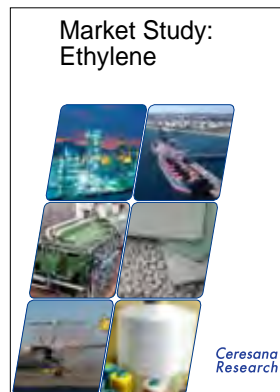
**Expandable Polystyrene**  
64 Countries, 63 Producers; 2 Vol., 690 P., 287 Graphs, 87 Tables; 03/10



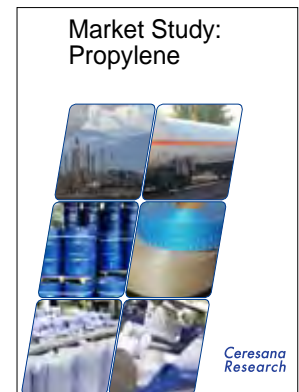
**Polyethylene - LDPE**  
67 Countries, 87 Producers; 2 Vol., 850 P., 300 Graphs, 100 Tables; 04/10



**Plastic Caps**  
31 Countries, 379 Producers; 2 Vol., 1,100 P., 139 Graphs, 72 Tables; 09/10



**Ethylene**  
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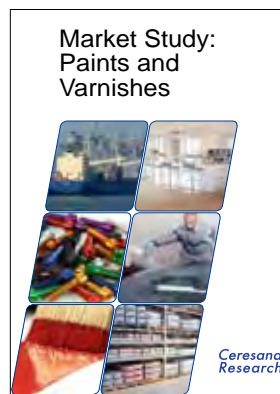
**Propylene**  
51 Countries, 137 Producers; 2 Vol., 760 P., 257 Graphs, 137 Tables; 01/11



**Plastic Pipes**  
30 Countries, 135 Producers; 2 Vol., 590 P., 131 Graphs, 101 Tables; 03/11



**Adhesives**  
31 Countries, 199 Producers; 2 Vol., 870 P., 133 Graphs, 48 Tables; 03/11



**Paints and Varnishes**  
30 Countries, 138 Producers; 2 Vol., 575 P., 129 Graphs, 56 Tables; 04/11

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