



Global and China Coating Industry Report, 2010-2011

Nov. 2011

This report

- ◆ **Analyzes development global coating industry**
- ◆ **Focuses on the automotive coating, Protective & Marine Coating and decorative coating market**
- ◆ **Highlights the operation of key coating enterprises**

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Abstract

In 2010, the global market scale of coatings hit about USD90 billion and is expected to grow around 10% to USD99 billion in 2011. Building decorative coating accounts for approximately 45% of the total market, the most among all coatings.

Vehicle coating presents the second largest application area, making up roughly 15%, of which, OE and refinish coatings occupying about 50% and 45% respectively.

Protective & marine coating (PMC) represents the third largest application field, accounting for about 12%. General industrial coating makes up roughly 10%, followed by powder coating, wood coating, coil coating, packaging coating, etc.

Geographically, China topped the world in terms of infrastructure and real estate investment, so China is no doubt the world's largest coating market. The market scale of coating in China approximated USD18.9 billion in 2011, 54% of which was attributable to decorative coatings. In 2011, although the Chinese market was suppressed by the national policy, real estate still remained strong. From Jan. to Sep. 2011, the domestic real estate investment totaled RMB4.42 trillion, up 32.0% YoY.

During the 12th Five-Year period (2011-2015), the Chinese government plans to complete 36 million suites of affordable housing. Among them, 10 million suites will be built in 2011 and 2012 respectively, and the rest 16 million suites will be established between 2013 and 2015. It is estimated that China's real estate market is likely to rebound after the long-term suppression, and the market size of decorative coatings in China will exceed USD12 billion.

China is the world's largest coating market, but its domestic coating enterprises are small-scale. The number of domestic coating companies surpasses 2,500, while their revenue together only accounts for 11% of the Chinese coating market. Among them, Guangdong Carpoly Chemical Co., Ltd. is the largest one and its revenue in 2011 is expected to register roughly USD350 million. Chinese coating enterprises mainly concentrate on the paint area.

AkzoNobel, founded in 1646, is the world's largest coating manufacturer with the most complete product line and the longest history. AkzoNobel is well-known for its Dulux paint in China which occupied the second largest share in the Chinese market and ranked No.1 in the real estate pre-decoration area.

Sales of Key Coating Manufacturers Worldwide, 2010-2011

Unit: US\$M	2010	2011E
AkzoNobel	12,931	14,736
PPG	9,782	10,988
Sherwin-Williams	7,776	8,008
DuPont	3,806	4,188
BASF	3,416	3,791
Valspar	3,227	3,594
RPM	3,413	3,381
Diamond-Vogel	3,320	3,008
Kansai	2,850	2,808
Nippon	2,680	2,698
Sika	2,380	2,390
Jotun	1,987	2,008
Comex	1,620	1,598
Asian Paints	1,610	1,988
Masco	1,693	1,763
DAW	1,428	1,596
KCC	1,338	1,456
Chugoku	1,118	1,288
Hempel	1,179	1,260
Becker	1,051	1,218

Most coating enterprises are century-old ones, and DuPont and Valspar have a history of more than 200 years. Coating companies usually witnessed a large number of mergers and acquisitions during their development.

BASF, DuPont, PPG, Kansai, DAW and KCC attach most importance to automotive coating. Sherwin-Williams has 3,390 paint chain stores in the United States, while runner-up AkzoNobel only has 496 chain stores.

Valspar, Diamond-Vogel, Sika, Comex, Masco and Asian Paints focus on building field and have their own advantages. For instance, Sika is expert in roof waterproofing coating. Valspar is the controlling company of Guangdong Huarun Paints, one of the largest coating manufacturers in China.

Asian Paints is the largest Indian paint company. Jotun, Chugoku and Hempel are the magnates of marine coating. Becker is skilled in coil coating and RPM specializes in general industrial coating.

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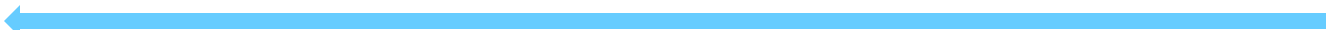
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