



# Global and China Automotive Coating Industry Report, 2011-2012

Jun. 2012

## STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

## REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

## METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

## INFORMATION SOURCES

The primary information sources include National Bureau of Statistics of China. China Coating Industry Association and China Association of Automobile Manufacturers etc.

## Abstract

In 2011, the global automotive coating market size surged by 10.2% to USD14.881 billion from USD13.501 billion in 2010; the OEM automotive coating market size increased by 10.5% to USD7.989 billion from USD7.231 billion; the automotive refinishing coating market size climbed by 13.5% to USD6.892 billion from USD6.070 billion in 2010. The market of automotive refinishing coating was driven by the increase in car ownership.

Automotive coating mainly refers to cationic electrocoat and primer surface, both of which are included in the OEM automotive coating, while automotive refinishing coating only refers to primer surface. As cationic electrocoat requires high technological threshold, less than 10 manufacturers worldwide are capable of the manufacture, let alone mass-production. The major players cover BASF, Dupont, PPG, Kansai Paints, Nippon Paints and KCC.

BASF is a Germany-based enterprise. Although DuPont is an American business, the automotive coating business of DuPont was sourced from Germany-based Herberts Group. PPG is the largest coating corporation in the United States. Both Kansai Paints and Nippon Paints are Japan-based companies, while KCC is from South Korea.

**Revenue of Major Automotive Coating Manufacturers Worldwide, 2010-2011 (USD mln )**

	2010	2011
PPG	3,596	3,788
Dupont	3,045	3,468
BASF	2,391	2,769
Akzo-Nobel	1,322	1,586
Kansai	1,098	1,208
Nippon	855	906
KCC	498	560

Source: RIC <Global and China Automotive Coating Industry Report, 2011-2012>, China

As there is a quite low threshold for access into the automotive refinish coating industry, a host of manufacturers tap into the business which features a very high degree of market concentration. And the combined market occupancy of the top 5 industrial players, including BASF, Dupont, PPG, Kansai Paints and Akzo-Nobel, hit 90%. Although the shipment of these manufacturers is not fairly huge, but the unit price is rather high. Akzo-Nobel boasts the world's largest coating corporation, but it is not so powerful in automotive coating sector. PPG is the world's largest manufacturer of both automotive refinish coating and automotive coating. But for KCC and Nippon Paints, both are only engaged in producing OEM automotive coating which is also the hit product of BASF.

The automotive market of China has seen revival in recent months, with the vehicle sales volume during Jan.-May up by 1.7% year-on-year to 8.0235 million units, reversing the year-on-year downward trend during the past four months. With the launch of economic stimulus policies by Chinese government, the automobile industry of China is expected to turn better in the second half of the year.

China's OEM automotive coating market, especially the sedan market, is dominated by foreign companies by and large. In terms of the primer surface for commercial vehicle, domestic manufacturers hold a certain market share, with the representatives including Shanghai Kinlita Chemical, Zhongshan Bridge Chemical, Zhongshan Bridge Chemical, WuHan Twin Tigers Coatings, Hubei Tiane Coating, V.ABC Paints Manufacturing (Shenzhen), Tianjin Colouroad Coatings & Chemicals and Fujian Xinzhanwang Chemical Industry. In particular, Shanghai Kinlita Chemical is one among a few in the world that masters the cationic electrocoat technology.

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