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# GLOBAL PAINT & COATINGS

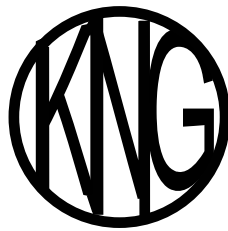
2009-2014

## A Multiclient Study Prospectus

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Kusumgar, Nerlfi & Growney is pleased to announce their newest technical and business multiclient market research study, **GLOBAL PAINT & COATINGS**. This in-depth technical and economic analysis will provide subscribers with detailed information on coating consumption by region. A separate section will summarize global coating consumption by end use. Information on coating supplier structure by region will be provided. The study compliments several of our published reports including **ASIAN PAINT & COATINGS** (2008), **THE U.S. PAINT & COATINGS INDUSTRY** (2007), **RADIATION-CURED PRODUCTS** (2006), **ASIAN COATING ADDITIVES** (2008), and **GLOBAL COATING ADDITIVES** (due late 2009).

The study will characterize coating consumption by region and end use for base years 2008 & 2009, and provide projections for usage in 2014. Coating supplier structure, end use consumption patterns by region, and industry concentration via mergers and acquisitions will be evaluated.



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## RECOVERING FROM THE GLOBAL DOWNTURN

Global coating consumption in 2009 is projected to total 60 billion pounds (as supplied) worth \$87 billion. Coating volume is down some 2% from 2008; value will be off even more owing to declining prices and dollar exchange rates which are currently less favorable than prior years. As highlighted in Table 1, the Asia-Pacific region is the only one forecast to have positive growth in 2009. The mature economies in the region (Japan, South Korea, and Taiwan) will have volume declines in 2009; China and India are expected to have modest growth. Asia-Pacific is the largest coating user taking 40% of the 2009 global poundage.

Europe and North America are each forecast to have volume declines of 6-7% in 2009. Car production in both regions has plummeted. In addition to a challenging market, new regulations (e.g.: EU Decopaint Directive) are lowering paint VOCs in both regions. Europe and North America each consume about 22-23% of the global paint volume. Latin American paint consumption has grown briskly in recent years, but is forecast to be down about 2% in 2009. Brazil is the largest consumer in the region. Russian paint consumption has also grown in recent years but will be down in 2009.

<b>Table 1</b>			
<b>GLOBAL COATING CONSUMPTION, BILLION LB</b>			
<b>Region</b>	<b>2008</b>	<b>2009</b>	<b>%AGR</b>
Asia-Pacific	23.4	23.6	1
Europe	14.1	13.3	-6
North America	13.9	12.9	-7
Latin America	4.6	4.5	-2
Russia	2.1	1.9	-10
Rest of World	2.9	2.7	-7
<b>TOTAL</b>	<b>61.3</b>	<b>60</b>	<b>-2</b>

World architectural paint consumption in 2009 is forecast at 34 billion pounds, down some 3% from 2008. Original equipment manufacturers (OEM) coating consumption in 2009 is projected to come in at 16.5 billion pounds, off 8% from the prior year. Special purpose coating consumption in 2009 is placed at 8.4 billion pounds, about the same as the prior year.

## **THE STUDY**

**GLOBAL PAINT & COATINGS** will characterize consumption in volume for 2008 and 2009 and estimate usage in 2014. The report will provide a comprehensive analysis of world coating usage. An Executive Summary will give subscribers a concise, easy to read representation of individual region consumption and end use markets. A business analysis will be provided which summarizes coating technology, supplier structure, significant trends, and mergers and acquisitions.

Subscribers will find **GLOBAL PAINT & COATINGS** the definitive reference work. Current participants and those contemplating entry, will find the study essential in their planning process. Firms contemplating introducing new materials and technologies will find the study particularly attractive. The study will accurately portray coating consumption by region and provide critical insight into future developments.

## **METHODOLOGY**

**GLOBAL PAINT & COATINGS** will be based on a limited number of interviews with formulators, raw material suppliers, end users, trade associations, and governmental agencies. Additionally, current literature, company web sites, government reports, etc. will be reviewed and analyzed. Kusumgar, Nerlfi & Growney's extensive knowledge of the coatings industry, gained over the past three decades, insures an accurate and comprehensive report

## **COMPLETION**

**Kusumgar, Nerlfi & Growney** initiated research on **GLOBAL PAINT & COATINGS** in the second quarter of 2009. Completion of the study is expected in September of 2009. The final study will be approximately 200 pages in length.

# **TENTATIVE TABLE OF CONTENTS**

## **TABLE OF CONTENTS**

### **SCOPE AND EXPLANATION ON HOW TO USE THIS REPORT**

### **EXECUTIVE SUMMARY**

- Region Overview
- End Use Review
- Supplier Structure
- Regional Comparisons

### **BUSINESS ANALYSIS**

- Overview
- Technology Review
- Coating Suppliers
- Mergers and Acquisitions

### **REGIONAL CONSUMPTION**

- Asia-Pacific
  - China
  - India
  - Japan
  - South Korea
  - Other Asia-Pacific Countries
- Europe
- Latin America
  - Argentina
  - Brazil
  - Other Latin American Countries

## **TENTATIVE TABLE OF CONTENTS (Continued)**

### **REGIONAL CONSUMPTION (continued)**

North America

Russia

Rest of World

### **END USE REVIEW**

#### **Original Equipment Manufacturer Coatings**

- Appliances
- Automotive OEM
- Other Transportation
- Coil
- Electrical
- General Metal
- Metal Containers
- Powder Coatings
- Wood Furniture & Other Wood
- Miscellaneous

#### **Architectural Coatings**

- Interior
  - Solvent-Based
  - Water-Based
- Exterior
  - Solvent-Based
  - Water-Based

#### **Special Purpose Coatings**

- Automotive Refinish
- High Performance Industrial Maintenance
- Marine

## OUR QUALIFICATIONS

Kusumgar, Nerlfi & Growney is a consulting firm specializing in market research and business analysis for the polymer and chemical industries. Members of the firm possess some 70 years of experience analyzing the coating, ink, adhesive, and sealant industries. Kusumgar, Nerlfi & Growney is dedicated to providing comprehensive and accurate information and insight on technology driven markets.

The information and analysis contained in **GLOBAL PAINT & COATINGS** will be developed by Michael Growney, Steven Nerlfi and Minesh Kusumgar. No outside contractors will be employed. Our expertise has been gained from conducting some 40 multiclient and numerous proprietary studies.

## ADDITIONAL SERVICES

Kusumgar, Nerlfi & Growney's recent projects include **THE U.S. PAINT & COATINGS INDUSTRY** (September 2007), **ASIAN PAINT & COATINGS** (September 2008) and **ASIAN ADHESIVES AND SEALANTS** (March 2009). **GLOBAL COATING & INK ADDITIVES** is a current project scheduled for completion year-end 2009. Interested parties should contact Kusumgar, Nerlfi & Growney for the brochures and to obtain additional information. Kusumgar, Nerlfi & Growney also welcomes inquiries for projects of a proprietary nature.

## SUBSCRIPTION INFORMATION

**GLOBAL PAINT & COATINGS** is available through subscription. Completion of the study is expected in September of 2009. The price of the study is \$5,000 to early subscribers and \$6,500 for subscription after July 1, 2009. Subscribers will receive three electronic copies of the report (PDF). To subscribe, please complete the contract on the following page and return to Kusumgar, Nerlfi & Growney. For additional information please contact Kusumgar, Nerlfi & Growney at 973/472-0300 or [nerlfikng@cs.com](mailto:nerlfikng@cs.com). Information is also available at our web site: [www.kusumgar-nerlfi-growney.com](http://www.kusumgar-nerlfi-growney.com).

# CONTRACT FOR GLOBAL PAINT & COATINGS

## KUSUMGAR, NERLFI & GROWNEY

21 Pine Street  
Lodi, NJ 07644

Please initiate our participation in **GLOBAL PAINT & COATINGS**. We understand our subscription entitles us to three PDF copies of the final report.

We agree that for a period of three years from publication to:

1. Not reproduce the study, in whole or in part, by any means.
2. Restrict use of the study to our own employees.
3. Prevent the disclosure of its contents, to the best of our ability, to any other firm or person.

We understand that we may disclose the contents of this study to any firm that we own more than half of, or to a company that maintains more than a half interest in our firm. We may use or disclose any information in the study which is public knowledge, in our possession before receiving the report, or that has been obtained from third parties, but not from this study.

Kusumgar, Nerlfi & Growney will take reasonable precautions to prevent disclosure of the contents of this study, except to subscribers, for a period of three years after it is issued.

We understand the fee for **GLOBAL PAINT & COATINGS** is \$5,000 for subscription by July 1, 2009, and \$6,500 thereafter.

Kusumgar, Nerlfi & Growney will invoice us for the full amount upon acceptance of our participation, after a countersigned copy of this contract is returned to us for our records. We will pay this invoice within thirty days.

**Accepted: Kusumgar, Nerlfi & Growney**

**Subscriber**

Signature

Signature

Name

Name

Title

Title

Date

Date

# **POLYMER AND CHEMICAL BUSINESS ANALYSIS AND MARKET RESEARCH**

## **ADDITIONAL SERVICES**

**GLOBAL PAINT & COATINGS** is Kusumgar, Nerlfi & Growney's eighteenth multiclient study. Studies immediately available, or scheduled for completion, include:

- **ADHESIVES IN DEVELOPING REGIONS**, December 2003
- **ADDITIVES 2003-2008**, September 2004
- **THE ASIAN COATINGS INDUSTRY**, September 2005
- **RADIATION CURED PRODUCTS 2005-2010**, June 2006
- **THE U. S. PAINT & COATINGS INDUSTRY**, September 2007
- **ASIAN COATING ADDITIVES**, May 2008
- **ASIAN PAINT & COATINGS**, September 2008
- **ASIAN ADHESIVES & SEALANTS**, March 2009
- **GLOBAL COATING & INK ADDITIVES**, Due year-end 2009

Interested parties should contact Kusumgar, Nerlfi & Growney for subscription information. We also welcome inquires for projects of a proprietary nature.



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