
THE GLOBAL RADIATION-CURED PRODUCTS INDUSTRY 2012-2017

A Multiclient Study Prospectus

COATINGS, INKS, ADHESIVES

Kusumgar, Nerlfi & Growney is pleased to announce their newest technical and business market research study, **THE GLOBAL RADIATION-CURED PRODUCTS INDUSTRY, 2012-2017**. This in-depth technical and economic analysis will provide subscribers with a thorough characterization of this technology in the coating, adhesive and ink industries. The study will provide regional information on end use markets, and oligomer, monomer and photoinitiator consumption. The supplier structure of formulators and raw material providers will be included. The report is **our fourth analysis** of this green technology.

The study will characterize radiation-cured product consumption in the selected industries by region for the base year 2012, and will provide projections for usage in 2017. **THE GLOBAL RADIATION-CURED PRODUCTS INDUSTRY, 2012-2017** will investigate the competitive dynamics of the technology and its materials, and provide critical insight for future development.



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APPLICATION, PERFORMANCE, AND ENVIRONMENTAL ADVANTAGES

From an emerging technology just 3-4 decades ago, radiation-cured products achieved estimated global sales of 295,000 metric tons in 2011 valued at \$3.4 billion. Growth stalled during the 2008-2009 global recession, but has recovered and is forecast to expand at 6% per year through 2016. Growth is being propelled by productivity, performance, and environmental advantages compared to the more traditional technologies found in the coating, ink and adhesive industries. Several larger volume applications for radiation-cured products are now well established and offer only modest growth prospects. However, new applications such as inkjet inks, field-applied floor coatings, and water-based UV coatings continue to be developed which augment growth.

As highlighted in Table 1, the Asia-Pacific region is the largest consumer of radiation-cured products. The region is also the fastest growing user with China leading the way. The Asia-Pacific region consumed and estimated 111,500 tons of radcure products in 2011 valued at \$1.3 billion. Europe consumed 103,500 tons of radiation-cured products in 2011 worth \$1 billion and North America 66,500 tons of products also valued at some \$1 billion. Europe and North America are more mature outlets for radiation-cured products. However, growth in these regions continues to outpace that of the coatings, inks, and adhesives industries.

Region	Coatings	Inks	Adhesives	Total
Asia-Pacific	80,000	26,000	5,500	111,500
Europe	82,000	17,000	4,500	103,500
North America	46,000	15,000	5,500	66,500
South America	11,000	2,000	500	13,500
TOTAL	219,000	60,000	16,000	295,000

The leading raw materials for radcure products are oligomers, monomers and photoinitiators. The bulk of the oligomer and monomer are acrylated materials. In 2011 an estimated 120,000 tons of oligomer and 130,000 tons of monomer were consumed globally for radiation-cured coatings, inks, and adhesives. Primary photoinitiator consumption was an additional 17,000 tons.

THE STUDY

THE GLOBAL RADIATION-CURED PRODUCTS INDUSTRY, 2012-2017 will characterize the regional consumption of radiation-cured coatings, inks, and adhesives during 2012 and forecast usage in the year 2017. The report will provide a comprehensive analysis of formulated products and raw materials. A thorough business analysis will be provided which includes profiles of leading formulators and raw material suppliers. Significant trends, new developments, regulatory and green implications, mergers and acquisitions, and technology will be covered in detail.

Subscribers will find **THE GLOBAL RADIATION-CURED PRODUCTS INDUSTRY, 2012-2017** the definitive reference work. Current radiation-cured product participants, and those contemplating entry, will find the study essential in their planning process. Firms introducing new materials and technologies will find the study particularly attractive. The study will accurately portray the consumption of radiation-cured products by region and application and provide critical insight into future developments.

METHODOLOGY

THE GLOBAL RADIATION-CURED PRODUCTS INDUSTRY, 2012-2017 will be based on interviews with formulators, raw materials suppliers, equipment manufacturers, end users, and trade associations. Additionally, the available literature, company web sites, government reports, etc. will be reviewed and analyzed. Kusumgar, Nerlfi & Growney's extensive knowledge of the industry, gained over the last four decades, insures an accurate and comprehensive report.

COMPLETION

Kusumgar, Nerlfi & Growney plans on initiating research on **THE GLOBAL RADIATION-CURED PRODUCTS INDUSTRY, 2012-2017** in early 2012. Completion of the study is expected in the first quarter of 2013. The final study will be approximately 300 pages in length.

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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 80 years of experience analyzing the coating, ink, and adhesive industries. Kusumgar, Nerlfi & Growney is dedicated to providing comprehensive and accurate information and insight on technology driven markets.

The information and analyses contained in **THE GLOBAL RADIATION-CURED PRODUCTS INDUSTRY, 2012-2017** will be developed by Michael Growney, Minesh Kusumgar and Steven Nerlfi. No outside contractors will be used. Our expertise has been gained from conducting over three dozen multiclient and numerous proprietary studies.

ADDITIONAL SERVICES

Kusumgar, Nerlfi & Growney's current projects include **THE U.S. PAINT & COATINGS INDUSTRY, 2011-2016** and **THE GLOBAL SEALANTS INDUSTRY, 2011-2016**. The U.S. coatings study will characterize coating consumption by end use, technology, and polymer type. Separate sections of the report analyze coating polymers, pigments and solvents. Completion of the study is expected in early 2012. The global sealants study will provide detailed information on consumption by region, end use, and polymer type. Completion is expected in the third quarter of 2012.

Our newest study is **THE GLOBAL ADHESIVES INDUSTRY, 2009-2014** which was published in September of 2010. This study provides detailed information on adhesive consumption by region, end use and adhesive type. Interested parties should contact Kusumgar, Nerlfi & Growney for brochures and additional information. Kusumgar, Nerlfi & Growney welcomes inquiries for projects of a proprietary nature.

SUBSCRIPTION INFORMATION

THE GLOBAL RADIATION-CURED PRODUCTS INDUSTRY, 2012-2017 is available through subscription. Completion of the study is expected in the first quarter of 2013. The price of the study is \$8,500 to early subscribers; \$10,500 to those subscribing while in progress; and \$12,500 for post publication subscription. Subscribers will receive 3 electronic (PDF) copies of the report. Additional copies are available for \$700 and a corporate use license is available for \$1,500. To subscribe, please complete and sign the contract on the following page and return to Kusumgar, Nerlfi & Growney. For additional information please contact Kusumgar, Nerlfi & Growney at 201-773-0785 or nerlfikng@cs.com. Additional information about Kusumgar, Nerlfi & Growney can be obtained at our web site: www.kusumgar-nerlfi-growney.com.

**CONTRACT FOR THE GLOBAL RADIATION-CURED PRODUCTS
INDUSTRY, 2012-2017**

**KUSUMGAR, NERLFI & GROWNEY, INC.
45 Willow Street
Elmwood Park, NJ 07407**

Please initiate our participation in **THE GLOBAL RADIATION-CURED PRODUCTS INDUSTRY, 2012-2017**. We understand our subscription entitles us to three CD 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 **THE GLOBAL RADIATION-CURED PRODUCTS INDUSTRY, 2012-2017** is \$8,500 for early subscription; \$10,500 during progress; and \$12,500 after publication.

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**

Subscribing Company

Signature

Signature

Name

Name

Title

Title

Date

Date

POLYMER AND CHEMICAL BUSINESS ANALYSIS AND MARKET RESEARCH

ADDITIONAL SERVICES

THE GLOBAL RADIATION-CURED PRODUCTS INDUSTRY, 2012-2017 is Kusumgar, Nerlfi & Growney's twenty-first multiclient study. Studies immediately available, or scheduled for completion, include:

- **THE ASIAN COATINGS INDUSTRY**, September 2005
- **RADIATION-CURED PRODUCTS, 2005-2010**, July 2006
- **THE U.S. PAINT & COATINGS INDUSTRY, 2006-2011**, September 2007
- **ASIAN COATING ADDITIVES**, May 2008
- **ASIAN PAINT & COATINGS**, September 2008
- **ASIAN ADHESIVES & SEALANTS**, March 2009
- **GLOBAL PAINT & COATINGS**, October 2009
- **GLOBAL COATING & INK ADDITIVES**, March 2010
- **THE GLOBAL ADHESIVES INDUSTRY**, September 2010
- **THE U.S. PAINT & COATINGS INDUSTRY, 2011-2016**, Due Early 2012
- **THE GLOBAL SEALANTS INDUSTRY, 2011-2016**, Due Third Quarter 1012

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



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