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# GLOBAL COATING & INK ADDITIVES

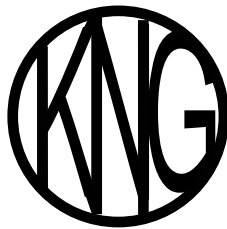
**Dispersants  
Foam Control  
Rheology Modifiers  
Slip/Rub  
Wetting Agents**

## **A Multiclient Study Prospectus**

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**Kusumgar, Nerlfi & Growney** is pleased to announce their newest technical and business market research study, **GLOBAL COATING & INK ADDITIVES**. This in-depth technical and economic analysis will provide subscribers with a thorough global characterization of selected additives consumed for coatings and inks. The study will analyze five major additive types used in coatings and inks. The study will investigate the impact of the recent global slowdown on consumption and provide a forecast for future demand.

The study will characterize additive consumption by region for the base year 2009, and will provide projections for usage in 2014. **GLOBAL COATING & INK ADDITIVES** will investigate the competition between additive types, and provide critical insight for future developments. Additive technology, regulatory impacts, supplier structure, and merger and acquisitions will be evaluated.



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## **BIG IMPACTS FROM SMALL LEVELS OF ADDITION**

Worldwide consumption of five leading additives for coatings and inks was 1.4 billion pounds worth \$3.1 billion in 2008. Coatings took some 80% of the value and inks the remainder. In the recent past, growth registered a 5-6% annual rate of increase with the emerging economies in Asia leading the way. In 2009, minimal worldwide growth is expected; recovery is expected thereafter. Coatings consumed some 80% of the additive dollars and inks the remainder. Architectural coatings took most of the additive volume in coatings; higher value additives are typically used in original equipment manufacturer coatings.

Asia is the largest outlet for coating and ink additives taking 40% of the dollars. Japan and China are the leading consumers and highlight the growth variances between mature and developing economies. Japan has seen only slight growth in the recent past, while in China consumption has been expanding at double digit rates. South Korea is the third largest consumer of additives in the region and like Japan is a mature market for coating and ink additives. Europe and North America each consume about one-quarter of the additive volume. Consumption in these regions is projected to be down in 2009. Improved performance and environmental advantages are emphasized in North America and Europe. The rest of the world takes some 10% of the additive value.

Rheology modifiers are the largest additives in coatings and inks with about one-third of the global dollar value. Cellulosic, WB synthetic, SB organic, and inorganic are the major rheology modifier types. Dispersants are the second largest additive capturing some 22% of the value. Polyacrylic acid materials, polymeric, and other specialized materials are employed. Foam control additives are 17% of the dollars and are comprised of silicone, mineral oil/surfactant mixtures, and polymeric materials. Wetting agents are 15% of the value and slip and rub materials 12%. Wetting agents are comprised of surfactants, silicones, acrylic polymers and other materials. Slip and rub materials are also referred to as waxes and include polyethylene, fluoropolymer, and silicone materials.

## THE STUDY

**GLOBAL COATING & INK ADDITIVES** will characterize consumption of the selected additives for base year 2009 and provide projections to the year 2014. The report will provide a comprehensive analysis of the selected additives in coatings & inks by region. The study will estimate the market size of each of the additives in pounds and dollars by region. Growth rates, trends, recent developments, opportunities, application methods, supplier structure, pricing, applications, and end users will be assessed. An analysis of competitive material dynamics is an important component of each of the chapters. A separate section of the report will summarize each of the additive types.

An Executive Summary will provide subscribers a concise, easy to read representation of the selected additives. A thorough Business Analysis will include profiles of the leading additive suppliers. An assessment of government activity, recent developments, and a review of mergers and acquisitions will be part of the Business Analysis. **GLOBAL COATING & INK ADDITIVES** will accurately portray the position of additive types in the identified regions, and provide critical insight into future developments.

## METHODOLOGY

The successful completion of **GLOBAL COATING & INK ADDITIVES** will require approximately 200 interviews with end users, trade associations, formulators, raw material and equipment suppliers, and government agencies. Current literature will be reviewed and analyzed. The principals of **Kusumgar, Nerlfi & Growney** possess extensive knowledge of the coating and ink industries and additives used. Over the past three decades they have analyzed these industries and their additives on many occasions. Our expertise insures an accurate and comprehensive report.

## COMPLETION

**Kusumgar, Nerlfi & Growney** plans on initiating research on **GLOBAL COATING & INK ADDITIVES** in the first quarter of 2009. Completion of the study is expected year end 2009. The recent changes in economic conditions will be investigated as to the impact on consumption. The final study will be approximately 300 pages.

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

The information and analyses contained in **GLOBAL COATING & INK ADDITIVES** will be developed by Michael Growney, Minesh Kusumgar and Steven Nerlfi. No outside contractors will be employed. Our expertise has been gained from conducting over 35 multicient and numerous proprietary studies.

## ADDITIONAL SERVICES

Kusumgar, Nerlfi & Growney's current multicient project is **ASIAN ADHESIVES & SEALANTS**. This detailed study will provide subscribers with information on formulated adhesives and sealants in Asia by country, end use, and technology. Kusumgar, Nerlfi & Growney's most recent report is **ASIAN PAINT & COATINGS** which was completed in September of 2008. This study characterizes coating consumption by end use in eleven countries in the region. A separate section of the report details coating consumption by end use. The supplier structure of coatings by country and end use is provided.

Another new study, **ASIAN COATING ADDITIVES**, was completed in May of 2008. The study characterizes additive consumption in Asia by country and type. Biocides, dispersants, foam control, rheology modifiers, slip/rub materials, UV stabilizers, and wetting agents are covered in the report. 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

**GLOBAL COATING & INK ADDITIVES** is available through subscription. The price of the study is \$9,000 to early subscribers before February 2009; \$10,500 to those subscribing while in progress; and \$12,000 for post publication subscription. Subscribers will receive three electronic copies (PDF) of the report. Additional copies are available upon request. To subscribe, please complete and sign the contract on the following page and return to Kusumgar, Nerlfi & Growney. For additional information please call Kusumgar, Nerlfi & Growney at 201-773-0785 (FAX: 201-773-0785) or e-mail us at nerlfikng@cs.com.

# CONTRACT FOR GLOBAL COATING & INK ADDITIVES

**Kusumgar, Nerlfi & Growney, Inc.**  
**45 Willow Street**  
**Elmwood Park, NJ 07407**

Please initiate our participation in **GLOBAL COATING & INK ADDITIVES**. We understand our subscription entitles us to three electronic copies (PDF) 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 COATING & INK ADDITIVES** is \$9,000 for early subscribers; \$10,500 during progress; and \$12,000 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

Subscriber:

Signature

Signature

Name

Name

Title

Title

Date

Date

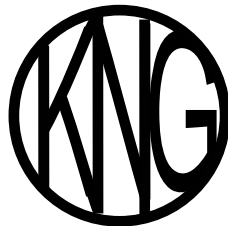
# **POLYMER AND CHEMICAL BUSINESS ANALYSIS AND MARKET RESEARCH**

## **ADDITIONAL SERVICES**

**GLOBAL COATING & INK ADDITIVES** 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**, 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**, due year-end 2008
- **WATER-BASED RESINS**, 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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