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# **GLOBAL COATING & INK ADDITIVES**

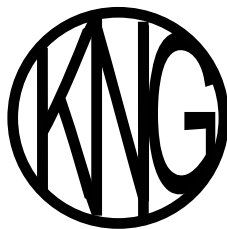
**Dispersants  
Foam Control  
Rheology Modifiers  
Slip/Rub  
Wetting Agents**

**A Multiclient Study**

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**NOW AVAILABLE**

**March, 2010**



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## LEADING THE WAY IN COATING & INK DEVELOPMENT

**GLOBAL COATING & INK ADDITIVES** covers five of the leading additives consumed in the two industries: rheology modifiers, foam control agents, dispersants, slip & rub materials, and wetting agents. Consumption in 2009 was 1.72 billion lb worth \$3.47 billion and a 5% annual rate of growth is forecast through 2014. Volume was down -10 in 2009 compared to the prior year. In 2014 additive poundage will be up 30% compared to 2009, but a lower 18% vs. 2008. Each of the five additive types is forecast to grow between 5-6% through 2014, although there are wider variances in growth of the different chemistries used.

Rheology modifiers are the leading type with 39-40% of the pounds and dollars in 2009. Cellulosics, WB synthetics, fumed silicas, and organoclays are the leading rheology modifiers.

Foam control additives edge out dispersants for second in value in 2009 but are third behind dispersants in volume. The bulk of the foam control additives are consumed in WB paints. Dispersants were 20% of the 2009 pounds and 17% of the dollars. Dispersants range from highly specialized polymeric types to higher volume polyacrylic acid varieties for architectural paints.

Slip and rub additives were fourth in volume and value and are comprised of wax products and silicones. Most slip/rub additives are consumed in coatings, but they are the largest additive employed in inks. Wetting agents were 11% of the volume and 12 % of the value in 2009. A wide variety of types are used with alkoxyated surfactants, acetylenic glycol derivatives, silicones, and acrylics the leading kinds.

Table 1 summarizes additive consumption by region. Europe and Asia-Pacific are the largest consumers in volume, each with about one-third of the pounds in 2009. Europe leads in dollars with a 36% share compared to a 32% share for Asia-Pacific. Volume in Europe was down -13% compared to 2008 and a 4% annual rate of growth is forecast through 2014. Volume in Asia-Pacific was down by a more modest -3% in 2009; an 8%/yr rate of growth is forecast. China and India were among the exceptions to the global decline in additives. China was one-half of the additive volume in Asia-Pacific in 2009 and 46% of the value.

North America took 27% of the global additive volume in 2009 and 26% of the dollars. Volume in the region was down -13% over 2008 and a 3%/yr rate of growth is forecast.

<b>Table 1</b>							
<b>ADDITIVE CONSUMPTION BY REGION, IN MILLIONS</b>							
<b>Region/Country</b>	<b>2008</b>		<b>2009</b>		<b>2014</b>		<b>AGR 09-14</b>
	<b>LB</b>	<b>\$</b>	<b>LB</b>	<b>\$</b>	<b>LB</b>	<b>\$</b>	
Europe	654.6	1431.3	569.2	1236.3	697.4	1502.3	4
Asia-Pacific	593.9	1173.3	576.9	1121.6	851.2	1634.8	8
China	273.2	485.6	288.8	512.9	462.6	833.1	10
Japan	127.0	309.1	106.5	258.5	122.4	298.0	3
South Korea	53.2	117.6	45.5	99.7	52.9	115.8	3
India	49.7	86.1	54.8	94.9	106.0	183.1	14
Rest Of Asia	90.8	174.9	81.3	155.6	107.3	204.8	6
North America	530.1	1052.9	458.7	900.0	535.6	1053.6	3
South & Central America	87.2	168.0	81.3	155.1	110.0	209.1	6
Rest Of World	34.4	64.0	31.3	57.1	45.4	81.4	8
<b>TOTAL</b>	<b>1900.2</b>	<b>3889.5</b>	<b>1717.4</b>	<b>3470.1</b>	<b>2239.6</b>	<b>4481.2</b>	<b>5</b>

## **THE STUDY**

**GLOBAL COATING & INK ADDITIVES** characterizes consumption for base year 2009 and provides projections to the year 2014. Consumption for the year 2008 is also provided as a point of reference. The report gives a comprehensive analysis of global coating and ink additive consumption by region, industry, and technology. Growth rates, trends, recent developments, supplier structure, applications, and end users are assessed. Coating and ink consumption by region and end use is provided. The supplier structure of coating and ink products is provided.

An Executive Summary provides subscribers a concise, easy to read representation of the coating and ink additive industry. The Business Analysis summarizes consumption by industry and technology. The global coating and ink industries are analyzed in detail. A review of mergers and acquisitions is part of the Business Analysis. **GLOBAL COATING & INK ADDITIVES** accurately portrays the industry in the identified regions and countries, and provides critical insights into future developments.

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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 & sealant 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** was developed by Michael Growney, Minesh Kusumgar and Steven Nerlfi. No outside contractors were employed. Our expertise has been gained from conducting over 35 multiclient and numerous proprietary studies.

## ADDITIONAL SERVICES

Kusumgar, Nerlfi & Growney's current multiclient project is **THE GLOBAL ADHESIVES INDUSTRY**. The study will provide detailed information on formulated adhesive consumption by region, end use, and technology. The study will investigate the impact of the recent global slowdown on consumption and provide a forecast for future demand.

Our recently completed studies include **ASIAN PAINT & COATINGS, ASIAN ADHESIVES & SEALANTS**, and **ASIAN COATING ADDITIVES**. Interested parties are invited to contact Kusumgar, Nerlfi & Growney for brochures and additional information. Brochures can be obtained at [www.kusumgar-nerlfi-growney.com](http://www.kusumgar-nerlfi-growney.com). We welcome inquires for projects of a proprietary nature.

## SUBSCRIPTION INFORMATION

**GLOBAL COATING & INK ADDITIVES** is available through subscription. The price of the study is \$12,000. Subscribers will receive 3 electronic copies (PDF) of the report. Additional copies are available upon request of the subscriber for \$750. A corporate use license is available. 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: 201-773-8517) or e-mail us at [nerlfikng@cs.com](mailto: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 \$12,000.

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

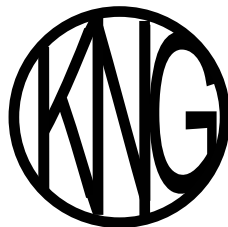
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## **ADDITIONAL SERVICES**

**GLOBAL COATING & INK ADDITIVES** is Kusumgar, Nerlfi & Growney's seventeenth 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**, March 2009
- **GLOBAL PAINT & COATINGS**, October 2009
- **THE GLOBAL ADHESIVES INDUSTRY**, mid 2010

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