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Resins in Paints & Coatings: Polyurethanes

Report Objective

New for 2017, NexantThinking™ is developing its 'Resins in Paints & Coatings' program which will include three reports, one each focused on epoxy, polyurethane (PU) and acrylic resins. These reports will address the key challenges and opportunities for resin producers within the paints and coatings sector by providing end use demand by sector including key developments in the paints and coating industry, evaluation of purchasing behaviour and technology developments. The reports will also provide market dynamics and pricing analysis for the key resin raw materials (e.g. benzene and isocyanates for polyurethanes).

This report will focus on 'Polyurethanes in Paints & Coatings'. It will address the key challenges and opportunities for PU use within the paints and coatings sector and provide you with detailed insights to enhance your planning activities

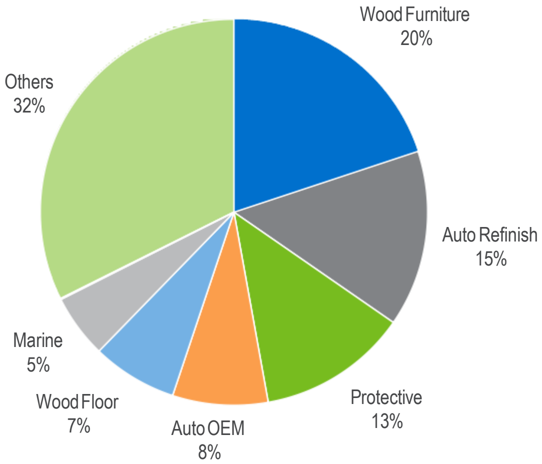
Overview

The global paints and coatings industry produces 35-40 million tons of coatings per annum, with a value of nearly US$100 billion. Consumption is split evenly between architectural or decorative paints and coatings and industrial coatings. The Asia Pacific region accounts for around 45 percent of total global volume demand, around twice that of Europe in second place. Rapid growth over the last 15-20 years in China has made this the largest single country market for coatings.

Commercially important binders for paints and coatings include alkyd resins, vinyl and acrylic emulsions, epoxy resins, polyurethanes and polyester resins.

The end-use market demand for polyurethane use in paints and coatings will be analysed and forecast. Wood furniture, auto refinish, protective, automotive original equipment manufacturer (OEM), wood flooring and marine are the

PU Demand by Paints and Coatings End-Use



Report Overview

The report will address key questions and concerns for PU resins used in coatings:

Market

- What is the end use demand for PU within the paints and coatings sector?
- What are the possible changes to isocyanates regulations and their potential impacts?
- Is PU resin growth for coatings maturing? Which segments are developing most?
- With focus on China and India, how strong is the inter-regional competition?
- What are the consolidation opportunities in the resin industry?

Economics

- How secure is the raw materials feedstock supply?
- What are the price trends? What are the dynamics in a lower oil environment and the impact on biobased innovations?

Technology

- What are the trends, threats and opportunities in the use of polyurethane technologies for liquid, powder and radiation-curable coatings?
- Multifunctional and smart coatings – what is the future capability and value of these?
- How are sustainable solutions being adopted, including:
  - Lower energy and CO2 emissions over the full life cycle.
  - Reduction of Volatile Organic Compounds (VOCs) and free from VOCs systems.
- How is light weighting via reduction of coating thickness and impact on PU resin volume growth?

For more details please see the prospectus

Deliverables

The deliverables will include a historical and forecast regional demand by end use for PU consumption in paints & coatings applications, as well as supply and trade balances. This will be supported by an analysis of the paints and coatings industry.

In addition, a historical and forecasted supply and demand analysis of key polyurethane raw materials (e.g. isocyanates) will be provided.

This study will include market dynamics for the following regions: global overview, Europe, USA, China and rest of world.

Further Information

For information regarding the upcoming Polyurethanes in Paints & Coatings report or other **Resins in Paints & Coatings** program reports on epoxies or acrylic resins, please contact STMC@nexant.com or visit us at: http://thinking.nexant.com.

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