Decorative Paints Market: APEJ Projected to Account for the Largest Market Value Share Throughout the Forecast Period: Global Industry Analysis and Opportunity Assessment, 2016-2026

Description: Decorative paints are liquids, mixtures, or composites which, when applied on surfaces, get converted into a thin film or layer. Decorative paints play an important role in the construction and architecture sector, where they are used to embellish the interiors as well as exteriors of buildings with various finishes such as matte finish, eggshell and satin, gloss and semi-gloss, etc.

The functionality of decorative paints differs significantly depending upon the prevailing climatic conditions. Revenue from the sales of decorative paints worldwide is estimated to be valued at US$ 42.9 Bn by 2016 end and the global decorative paints market is estimated to register a CAGR of 5.3% during the forecast period 2016-2026.

Changing consumer demands and rapid development of commercial and residential buildings expected to boost market growth.

A rapid growth in urbanisation along with a high standard of living and increasing customer preferences for depicting an architectural touch in residential buildings has boosted the demand for decorative paints in the last few years. A rising number of commercial buildings and rocketing construction of skyscrapers is further expected to push the demand for decorative paints in the coming years.

Manufacturers are producing paints that can be used on multiple substrates such as cement walls, wood, glass, tiles, composites, etc. with robust physical and chemical properties, providing consumers the freedom to use paints as per their suitability. This, in turn, is expected to boost the growth of the global decorative paints market over the forecast period. However, the threat of product substitution is expected to be a restraint to the global decorative paints market and use of nanotechnology based powder paints and coatings is expected to pose significant challenges to traditional decorative paints manufacturers globally.

Introduction of intelligent paints for controlling temperature and heat transfer in varied geographical and climatic conditions around the world is emerging as a major trend in the global decorative paints market. Also, the need to decrease the hazardous impact of solvent based paints on the environment across the globe is pushing manufacturers and consumers to go for water based paints that emit lower Volatile Emission Control (VOC) as compared to solvent based paints.

Market segmentation

By Product Type
- Water Based Paints
- Solvent Based Paints

By Formulations
- Emulsions
- Distemper

By Price
- Premium Range
- Medium Range
- Distemper range

By Application
- Interior
- Exterior

By Sales Channel
- Offline Store
Online Store

By Region
- North America
- Latin America
- Western Europe
- Eastern Europe
- Asia Pacific Excluding Japan
- Japan
- Middle East & Africa

Water Based Paints product type segment expected to account for maximum revenue share of the global decorative paints market.

The water based decorative paints segment is estimated to account for a large revenue share of 85.7% in the global decorative paints market by 2016 end, registering a healthy CAGR of 5.6% over the forecast period. Demand for water based decorative paints is expected to remain high due to their environment friendly nature as water based paints reduce VOC by 40% - 80%.

Emulsions formulations segment estimated to hold maximum revenue share of the global decorative paints market.

The emulsions segment is anticipated to account for 81.5% revenue share of the global decorative paints market by the end of 2016, witnessing a CAGR of 5.4% over the forecast period. Owing to their acrylic nature, a significant demand for emulsion paints comes from the retail and commercial sectors.

Premium Range price segment estimated to register a relatively high CAGR during the forecast period.

The premium range segment is anticipated to register a value CAGR of 5.5% by 2026. The medium range segment is estimated to hold approximately half of the total revenue share of the global decorative paints market and is expected to register a CAGR of 5.3% during the forecast period. Demand for premium range paints is mainly in interior applications while medium range paints are in demand in both interior and exterior applications.

Offline Store sales channel segment expected to hold maximum revenue share by 2016.

The offline store segment includes both multi-brand stores and company owned outlets whereas the online segment includes facilities where sales are done with the help of the internet. The offline segment is estimated to hold a disproportionately large share of 94.9% in terms of revenue by 2016 end. The market share of the online segment is small and is limited to the developed regions of North America and Western Europe.

Interior application segment expected to create high incremental $ opportunity between 2016 and 2026.

The interior segment is estimated to hold 76.2% market share in terms of revenue by 2016 end and is expected to register a CAGR of 5.5% over the forecast period. The exterior segment is estimated to be pegged at 5,663 KT by 2016 end in volume terms, registering a volume CAGR of 3.4%.

APEJ projected to account for the largest market value share throughout the forecast period.

With China as a major contributor of regional growth, the APEJ region is expected to dominate the global decorative paints market in terms of revenue with 28.2% share by 2016 end. North America and Latin America are estimated to collectively account for a market value share of 24.1% by the end of 2016. Supported by a healthy rebound in the construction industry, the North America decorative paints market is expected to show good signs of growth through 2026.

Top market players are focussing on enhancing their product portfolio through structured R&D initiatives.

Akzo Nobel N.V, The Sherwin-Williams Company, PPG Industries Inc., Asian Paints, Nipsea Group (Nippon Paints), BASF SE, The Valspar Corporation, Berger Paints India Limited, Kansai Paint Co. Ltd., RPM International Inc., and Jotun are some of the leading players operating in the global decorative paints market. Top companies are investing heavily in new manufacturing facilities and are collaborating with big international players to increase sales and retain their strategic position in the global decorative paints market.
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