



MEDICAL DEVICES



PHARMACEUTICALS



CHEMICALS



FOOD & BEVERAGE



ELECTRONICS

Top 10

Global Paint and Coatings Companies M&A, Joint Ventures, R&D Pipeline, and Strategies

A THOUGHT-PROVOKING REPORT ON PERFORMANCE, CAPABILITIES, GOALS AND STRATEGIES OF THE MAJOR COMPETITORS IN THE WORLDWIDE PAINTS AND COATINGS MARKET

- Akzo Nobel • Nippon Paint
- BASF • PPG
- DuPont • RPM
- Henkel • Sherwin-Williams
- Kansai • Valspar

Contains nearly 500 pages and 60 tables

Includes Worldwide Market Overview and Comparative Analysis

Visit vpgcorp.com to review this and over 5,000 other reports



VENTURE PLANNING GROUP

WWW.VPGCORP.COM

INFORMATION • INTELLIGENCE • ANALYSIS • INSIGHT

Rationale & Objectives

Timely and factual competitive intelligence is vital to the success of all business functions, especially Planning, Marketing, R&D and Manufacturing. A continuous assessment of the competitive environment is becoming widely recognized as the highest priority management responsibility-- crucial to business survival, growth and profitability.

In a highly dynamic and fragmented paints and coatings market, besieged by intense competition and rapid pace of technological innovations, the ability to anticipate new product introductions and marketing strategies is particularly important... and spells the difference between success and failure.

The **Top 10**, a unique series of market intelligence studies first published by VENTURE PLANNING GROUP in 1987, is designed to provide the paints and coatings industry executives with strategically significant competitor information, analysis and insight, critical to the

development and implementation of effective marketing and R&D programs. The study's major objectives include:

- To establish a comprehensive, factual, regularly-updated and cost-effective information base on performance, capabilities, goals and strategies of the world's leading paints and coatings companies.
- To help current suppliers realistically assess their technological and marketing capabilities vis-a-vis leading competitors.
- To assist potential market entrants in evaluating prospective acquisitions and joint venture candidates.
- To complement organizations' internal competitor information gathering efforts by providing strategic analysis, data interpretation and insight.
- To identify the least competitive market niches with significant growth potential.

Study Content

WORLDWIDE MARKET OVERVIEW, 2010-2015

The study provides a strategic overview of the worldwide paints and coatings market, including:

- Five-year sales forecasts for
 - Major market segments.
 - Key geographic regions.
- Assessment of the U.S. and international trends with potentially significant impact on the paints and coatings industry during the next five years, including industry consolidation, market globalization, environmental regulations, etc.
- Analysis of major market segments.
- Review of key geographic regions, including Europe, North America, Asia/Japan, Latin America and others.

COMPANY STRATEGIC ASSESSMENTS

The following companies have been selected as the **Top 10** suppliers with the highest worldwide sales of paints and coatings:

- Akzo Nobel
- BASF
- DuPont
- Henkel
- Kansia
- Nippon
- PPG
- RPM
- Sherwin-Williams
- Valspar

For each of the **Top 10** companies, the report provides an approximately **50-page** strategic analysis, including:

SECTION I: EXECUTIVE SUMMARY

- A 3-5 page synopsis of key sections.

SECTION II: BUSINESS ORGANIZATION

- History of the company's paints and coatings business evolution, which is important to understanding the corporate culture,

management mentality and strategies.

- Most recent M&A activity and significant organizational changes.
- Current organizational structure.

SECTION III: SENIOR MANAGEMENT

- Names, titles and background of key executives.

SECTION VI: FACILITIES AND EMPLOYEES

- Major administrative, manufacturing and R&D facilities in the U.S. and abroad.
- Manufacturing practices.
- New plants under construction.
- U.S. and international work force size and distribution.

SECTION V: TECHNOLOGICAL KNOW-HOW

- Internally developed and acquired technologies, and other related capabilities.
- Proprietary processes and patent litigations.

SECTION VI: PRODUCT PORTFOLIO

- Extensive review of major product lines.

SECTION VII: MARKETING TACTICS

- Major promotional tactics.
- Distribution approaches.
- Product service and support.
- Customer relations.

SECTION VIII: FINANCIAL ANALYSIS

- Estimated sales by division, geographic region and product line.
- Five-year sales and operating profit performance.

SECTION IX: R&D EXPENDITURES AND MAJOR PROGRAMS

- Estimated R&D budget.
- Research facilities and staff.
- New technologies and products in development.

SECTION X: COLLABORATIVE ARRANGEMENTS

- Major joint ventures, distribution, O.E.M. and licensing partners, both industrial and academic.
- Terms of collaborative agreements and specific products involved.

SECTION XI: STRATEGIC DIRECTION

- Specific business, new product development and marketing strategies.
- Strengths and weaknesses, e.g., managerial, organizational, marketing and product development.
- Anticipated acquisitions, joint ventures and divestitures.

COMPARATIVE ANALYSIS

In this section of the report, the Top 10 companies are ranked according to the following criteria:

- Sales estimates and market shares by product category and geographic region.
- Operating profit.
- R&D expenditures.
- Sales force size.

Methodology

INTERVIEWS

The study is based on a combination of primary and secondary information sources, including interviews with executives, industry experts, financial analysts, and others knowledgeable of the companies operations and future strategic directions.

INDUSTRY SHOWS

Information generated at paints and coatings industry shows, marketing conferences and scientific symposia occurring during the course of the study is also included in the report.

VENTURE PLANNING GROUP'S DATABASE

Venture Planning Group's proprietary data files, which contain current information on various companies, technologies, products and executives worldwide, were thoroughly searched to retrieve any data pertinent to the Top 10 companies' capabilities and strategies. These files were developed in the course of continuous monitoring of the industry, over 100 syndicated studies, and numerous single-client assignments.

SECONDARY INFORMATION SOURCES

A comprehensive review of the Top 10 companies' product and financial literature, business and technical periodicals, and pertinent industry analyst reports was conducted for the study.

Table of Contents

AkzoNobel

Executive Summary
Ownership
Business Evolution
Organization and Management
Major Facilities
Product Portfolio and Technological Know-How
Marketing Capabilities
Financial Analysis
Strengths and Weaknesses
Strategic Direction

BASF

Executive Summary
Ownership
Business Evolution
Organization and Management
Major Facilities
Product Portfolio and Technological Know-How
Marketing Capabilities
Financial Analysis
Strengths and Weaknesses
Strategic Direction

DuPont

Executive Summary
Ownership
Business Evolution
Organization and Management
Major Facilities
Product Portfolio and Technological Know-How
Marketing Capabilities
Financial Analysis
Strengths and Weaknesses
Strategic Direction

Henkel

Executive Summary
Ownership
Business Evolution
Organization and Management
Major Facilities
Product Portfolio and Technological Know-How
Marketing Capabilities
Financial Analysis
Strengths and Weaknesses
Strategic Direction

Kansai

Executive Summary
Ownership
Business Evolution
Organization and Management
Major Facilities
Product Portfolio and Technological Know-How
Marketing Capabilities
Financial Analysis
Strengths and Weaknesses
Strategic Direction

Nippon

Executive Summary
Ownership
Business Evolution
Organization and Management
Major Facilities
Product Portfolio and Technological Know-How
Marketing Capabilities
Financial Analysis
Strengths and Weaknesses
Strategic Direction

PPG

Executive Summary
Ownership
Business Evolution
Organization and Management
Major Facilities
Product Portfolio and Technological Know-How
Marketing Capabilities
Financial Analysis
Strengths and Weaknesses
Strategic Direction

RPM

Executive Summary
Ownership
Business Evolution
Organization and Management
Major Facilities
Product Portfolio and Technological Know-How
Marketing Capabilities
Financial Analysis
Strengths and Weaknesses
Strategic Direction

Sherwin-Williams

Executive Summary
Ownership
Business Evolution
Organization and Management
Major Facilities
Product Portfolio and Technological Know-How
Marketing Capabilities
Financial Analysis
Strengths and Weaknesses
Strategic Direction

Valspar

Executive Summary
Ownership
Business Evolution
Organization and Management
Major Facilities
Product Portfolio and Technological Know-How
Marketing Capabilities
Financial Analysis
Strengths and Weaknesses
Strategic Direction

List of Tables

AkzoNobel Sales and Operating Profit Growth
AkzoNobel Sales by Geographic Region and Country
AkzoNobel Sales Growth by Geographic Region and Country
AkzoNobel Sales by Business Segment
AkzoNobel Sales Growth by Business Segment
AkzoNobel Decorative Paints Sales by Geographic Region
AkzoNobel Decorative Paints Sales Growth by Geographic Region
AkzoNobel Performance Coatings Sales by Product Line
AkzoNobel Performance Coatings Sales by Geographic Region

BASF Sales and Operating Profit Growth
BASF Sales by Business Segment
BASF Sales Growth by Business Segment
BASF Operating Profit and Margins by Business Segment
BASF Performance Products Sales by Division
BASF Performance Products Sales Growth by Division
BASF Chemicals Sales by Division
BASF Plastics Sales by Division
BASF Functional Solutions Products Sales by Division
BASF Functional Solutions Products Sales Growth by Division
BASF Agricultural Solutions Products and Nutrition Sales by Division
BASF Sales by Geographic Region and Country

BASF Sales Growth by Geographic Region and Country
BASF Coatings Sales by Geographic Region

DuPont Sales and Operating Profit Growth
DuPont Sales by Industry Segment
DuPont Sales Growth by Industry Segment
DuPont Operating Income and Margins by Industry Segment
DuPont Sales by Geographic Region
DuPont Sales Growth by Geographic Region
DuPont Sales Growth by Country

Henkel Sales and Operating Profit Growth
Henkel Sales by Business Segment
Henkel Sales Growth by Business Segment
Henkel Operating Income and Margins by Business Segment
Henkel Operating Income Growth by Business Segment
Henkel Coatings Sales by Geographic Region
Henkel Coatings Sales Growth by Geographic Region

Kansai Paint Sales and Operating Profit Growth
Kansai Paint Sales by Geographic Region
Kansai Paint Sales Growth by Geographic Region
Kansai Paint Sales by Product Line

Nippon Paint Sales and Operating Profit Growth
Nippon Paint Sales by Business Segment

PPG Sales and Operating Profit Growth
PPG Sales by Business Segment
PPG Sales Growth by Business Segment
PPG Operating Income and Margins by Business Segment
PPG Operating Income Growth by Business Segment
PPG Coatings Sales by Geographic Region
PPG Sales Growth by Geographic Region

RPM Sales and Operating Profit Growth
RPM Sales by Business Segment
RPM Sales Growth by Business Segment
RPM Operating Income and Margins by Business Segment
RPM Operating Income Growth by Business Segment
RPM Coatings Sales by Geographic Region
RPM Coatings Sales Growth by Geographic Region

Sherwin-Williams Sales by Business Segment
Sherwin-Williams Sales and Operating Profit Growth
Sherwin-Williams Sales Growth by Business Segment
Sherwin-Williams Profit and Margins by Business Segment
Sherwin-Williams Profit Growth by Business Segment

Valspar Sales and Operating Profit Growth
Valspar Sales by Product Line
Valspar Sales Growth by Product Line
Valspar Sales by Country
Valspar Sales Growth by Country