



MEDICAL DEVICES



PHARMACEUTICALS



CHEMICALS



FOOD & BEVERAGE



ELECTRONICS

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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, 2014-2019

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 | • Nippon |
| • BASF | • PPG |
| • DuPont | • RPM |
| • Henkel | • Sherwin-Williams |
| • Kansai | • 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.

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