

# Architectural Paint Market in US - Industry Outlook and Forecast 2020-2025

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## Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this U.S. Architectural Paint Market Report

The U.S. architectural paint market share is expected to grow at a CAGR of over 4% during the period 2019–2025.

The U.S. architectural paint market is witnessing a sort of revival. Home improvement projects are on the rise owing to the COVID-19 pandemic as a major chunk of the population is sheltering in place. A lot of consumers are looking to tackle the long ignored and overdue renovation of their spaces or are taking up paint projects to keep themselves occupied during the lockdown, which is expected to contribute to the growth of the U.S. architectural paint market. As spaces are becoming more creative, experiential, design-friendly, and environmentally--conscious, colors are witnessing heightened attention. Since paints allow for complete transformations of environments, they are constantly being used to adapt to the changing pace of business.

Shortages in raw materials such as alcohol, pigments, and dyes, as well as delays in the transportation of materials owing to restrictions in travel, will have an impact on the market. Social distancing measures and lockdowns are likely expected to reduce economic activities further. Countries such as China are offering 12–15% of rebates on exports in a bid to regain value owing to tariff restrictions in 2019. An expected increase of about 7% in the construction rate of the residential sector is likely to drive construction spending by around 4%.

The following factors are likely to contribute to the growth of the U.S. architectural paint market during the forecast period:

DTC Companies fix the “Broken” Paint-buying Process

Artisanal Paint Companies making their Mark

Green Chemistry and Recycling on the Rise

Democratization of the Interior Design Landscape

The study considers the present scenario of the U.S. architectural paint market and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspect of the market. It profiles and examines leading companies and other prominent ones operating in the market.

#### U.S. Architectural Paint Market Segmentation

The U.S. architectural paint market research report includes a detailed segmentation by end-user, channel, application, and formulation. The DIY segment is expected to reach revenues of over \$5 billion by 2025 and will hold the largest U.S. Architectural Paint Market share. Retailers such as Lowe’s and Home Depot are observing a spike in demand for home improvement materials. This surge in demand is expected to see an upward trajectory even after the lift in lockdowns, driving the sale of architectural paints as people continue to shelter in place until the pandemic is wholly wiped out. DIYers have been driving sales for characteristically soft, ultra-matte finish paints.

In the midst of the renovation rush that has come on a decade after the recession, the need for interior paints has gone up across the United States. Gloss and semi-gloss finishes are expected to grow at the cost of flat finishes. However, the latter is still being preferred for low-traffic areas such as ceilings and hallways. Matte finishes are also being preferred over flat finishes. In San Francisco, California, muddy shades are covering walls, in New York City, nature-inspired colors are being incorporated, whereas, in Seattle, Washington, traditional colors are reigning. Moreover, exhibition spaces like museums and galleries occupy a more profound place in modern culture. This has driven operators to focus on how the paint can affect viewing experience, and renovate, driving demand for paints.

Offline stores, especially improvement ones, have historically dominated the market. However, with the advent of technology and digital media, a lot of the demand has

shifted online. Apart from the push that has come from e-commerce, the online medium has been feeding a frenzy for interior design, leading the medium to be a place of brand discovery and research.

Motivations that drive purchases along the platforms differ and converge in certain aspects. However, younger consumers have a channel-agnostic view of shopping offline and online — the differences tend to be irrelevant. The expectations offline are passed on online as well. Amid the pandemic, most offline channels that deliver home improvement products have remained open as they have been deemed essential. The offline channel has performed strongly, with some stores even posting double the sale.

Water-based paints have dominated the market and are likely to continue their dominance due to low odor, fast drying time, high color retention and film life, and easy cleanups. However, manufacturers have created waterborne coatings and enamels, which have a similar look and feel to oil-based paints. They offer the ease and convenience of water-based and durability of traditional oil paint, thereby further driving market share. Water-based come with their own set of challenges. As temperatures are soaring across the United States, characterized by heatwaves and unusually frigid weather, the application and performance of water-based owing to slower curing is compromised. This is proving to be a challenge in a market where labor shortage is critical, and so is the time is taken to complete a paint job.

### Segmentation by End-user

DIY

Residential Repaint

Commercial, Industrial, and Institutional Repaint

New Residential

New Commercial, Industrial, and Institutional

### Segmentation by Application

Interior Paints

## Exterior Paints

### Segmentation by Channel

Offline

Online

### Segmentation by Formulation

Water-based Paints

Oil-based Paints

## INSIGHTS BY VENDORS

The U.S. architectural paint market is highly concentrated. PPG Industries, Sherwin-Williams Company, Benjamin Moore, and Behr Process Corporation account for 90% of the market. New players are, however, disrupting the market, largely in terms of addressing subtle pain points. For instance, while paint and coating companies are heavily regulated, disclosing ingredients is not a requirement, so traditional players do not reveal the contents of their paint. Leading players have established geographically diverse brands and cater to the entire spectrum of consumers from value-oriented to premium.

### Prominent Vendors

PPG Industries

Sherwin-Williams Company

Behr Process Corporation

Benjamin Moore

## Other Prominent Vendors

AFM

AURO

Backdrop

California Paints

Clare

Dunn-Edwards

Diamond Vogel

Kelly-Moore

The Little Greene Paint Company

Yenkin-Majestic Paint

Cloverdale Paint

Color-Rare

Colortech

ECOS Paints

Farrow & Ball Paints

Lanco

O'Leary Paint

Real Milk Paint Co.

Recolor Paints

RomaBio

True Value Company

Key Questions Answered:

1. What is the U.S. architectural paint market size and growth forecast?
2. What are the factors, drivers, and trends impacting the growth of the US architectural paint market?
3. What is the revenue of the U.S. Architectural Coating market in the residential segment by 2025?
4. Which segment/application/formulation holds the highest market shares in the US region?
5. Who are the leading vendors in the market, and what factors are disrupting the market?
6. How is the COVID-19 pandemic significantly impacting the market growth of the architectural paint market size?

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