

Synthetic Latex Polymers 2009: North America Business Analysis and Opportunities

Fact Sheet

The Market

In 2009, the volume of synthetic latex polymers consumed in North America was in excess of 5.8 million dry pounds, valued at \$6.5 million. All acrylics is the leading latex with respect to both volume and value, closely followed by SBR and then styrene acrylics.

Market Share by Product Type, 2009

North American Breakdown by Product, 2009

Market Size (Volume) = 5,834 Billion dry lb

Market Size (Value) = \$6,525 Million

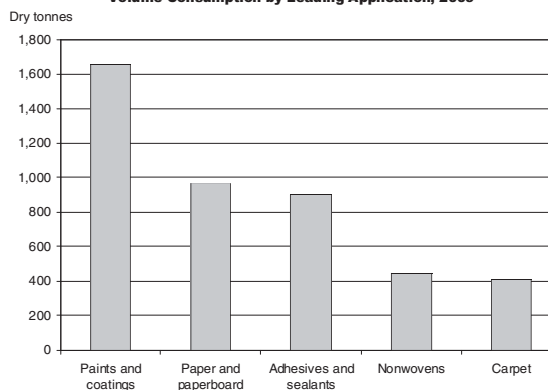


□ All-acrylics ■ SBR
 ■ Styrene-acrylics □ Vinyl-acrylics
 ■ PVAc ■ VAE
 ■ HS-SB □ RDP
 ■ Other

Applications

Paints and coatings is the leading application in the U.S. market, followed by paper and paperboard. The leading five application markets account for 82% of the volume of synthetic latex polymers consumed in the United States.

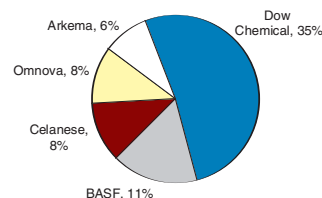
Volume Consumption by Leading Application, 2009



Companies

The leading five suppliers hold nearly 68% of the market share, are multinational companies. Direct sales are the typical channel, as suppliers can then provide technical support and work directly with their key accounts.

Market Share of the Leading Five Suppliers, 2009



Future Outlook

While the market for synthetic latex polymers is expected to grow at a CAGR of 2.4% through 2014, the market recovery towards the 2007 levels are expected to be reached by 2011-12. This growth for synthetic latex polymer would primarily be driven by applications like glove dipping, adhesives and sealants, and nonwovens.

Market Outlook for Synthetic Latex Polymers in the United States, 2010 to 2014

Volume Growth by Application, 2009-2014

