



Decorative Trend Talks

Addressing decorative macro trends at Covestro

High-performance solutions: A growing decorative market need

Delivering high-performance coating solutions with targeted resin technology

As consumers' standards for their living environments increase, they are seeking a wider range of decorative coatings for do-it-yourself (DIY) applications, and their performance expectations for these paints are higher than ever. At the same time, many painters and consumers still experience problems with their paints – from poor coverage and adhesion to stains and spilling. With its Decorative House of Resins – advanced resin technologies supported by detailed market insights – Covestro supports paint manufacturers to address these concerns and deliver specialty solutions.

WHITEPAPER



Rising consumer expectations

During – and following – the long months of COVID-19 lockdown restrictions, many consumers have been paying more attention to their living environments, painting a wide range of indoor and outdoor fixtures themselves. As a result, decorative paint consumption in the DIY segment is increasing – and so are consumers' expectations for paints' performance and aesthetic properties.



At Covestro, we were able to identify this trend using our unique approach to decorative coating innovation. Specifically, using 7.8 billion paint-related search engine queries, over 750,000 consumer paint reviews, and 37,000 annual interviews with consumers, painters, architects, and contractors, we've collected a range of in-depth market insights into the decorative coating solutions consumers are looking for.

An increasing need for high-performance specialty solutions

Through this research, we found that many painters and consumers are experiencing problems with the performance of their decorative paints. In particular, professional painters frequently reported problems with poor coverage, moisture issues, cracks, adhesion, and paint drying too quickly, while many consumers had difficulties with coverage, cleaning, color, smell, stains, and dripping or spilling.

Most common problems for professional painters

What are the top-3 problems in your daily work regarding wall and lacquer paints?

		Germany	France	Netherlands	Norway	Sweden
	n-119					
Poor coverage	16%	13%	26%	7%	9%	21%
Moisture issues	12%	0%	29%	15%	0%	0%
Paint dry too quickly	8%	6%	0%	11%	14%	11%
Drying issues	7%	0%	11%	0%	14%	5%
Cracks	7%	0%	9%	11%	5%	5%
Water-based paints	7%	13%	0%	15%	9%	0%
Poor quality	7%	6%	9%	4%	0%	16%
Adhesion of paint	6%	0%	11%	0%	5%	11%
Stripes	5%	0%	11%	4%	0%	5%
Dust and dirt	5%	13%	6%	0%	5%	5%
Price		0%	6%	4%	9%	0%
Cleaning		6%	0%	0%	0%	11%
Rotten wood		0%	0%	11%	0%	5%
Peeling paint		6%	9%	0%	0%	0%
Environmental pollution		13%	0%	4%	5%	0%
Bad information provision		6%	0%	11%	0%	0%
Sanding		6%	0%	11%	0%	0%
Even application		0%	3%	0%	5%	11%
Incorrect color		0%	9%	0%	0%	0%
Other	9%	0%	6%	4%	23%	16%
Don't know/ no opinion	10%	19%	3%	11%	18%	5%

Common paint problems for professional painters (Source: USP, Painter & Consumer research 2019)

Most common problems for consumers

What are the top-3 problems when working with wall and lacquer paints?

	n-284	Germany	France	Netherlands	Norway	Sweden
Poor coverage	21%	37%	11%	21%	18%	16%
Cleaning	11%	18%	18%	6%	9%	2%
Incorrect color	11%	7%	7%	21%	2%	12%
Smell	10%	3%	13%	12%	11%	4%
Dripping paint	10%	16%	11%	13%	5%	0%
Making a mess/ spilling	10%	7%	4%	9%	18%	14%
Even application	7%	13%	5%	0%	11%	6%
Taping off	7%	12%	4%	10%	5%	0%
Stains	6%	4%	2%	15%	2%	6%
Drying issues	6%	6%	13%	6%	7%	0%
Poor quality	6%	6%	5%	7%	7%	2%
Price	5%	3%	5%	7%	0%	8%
Time	5%	3%	2%	6%	5%	10%
Bad/broken walls		1%	4%	9%	0%	4%
Dust and dirt		6%	7%	4%	0%	0%
Uneven walls		10%	2%	0%	2%	4%
Sanding		1%	9%	7%	0%	0%
Poorly finished		1%	5%	7%	2%	0%
Chemicals		7%	2%	4%	0%	2%
Stripes		1%	7%	3%	0%	2%
Environmental pollution		9%	2%	0%	0%	0%
Other	6%	0%	5%	0%	7%	20%
Don't know	13%	7%	18%	6%	18%	18%

Common paint problems for professional painters (Source: USP, Painter & Consumer research 2019)



With the expectations of both consumers and painters higher than ever, it's never been more essential for paint manufacturers to deliver high-performing decorative solutions, across a wide range of application areas:

- **Flooring.** In flooring applications, scuff-resistance, black heel mark resistance (BHMR), and scratch-resistance are all in high demand. At the same time, consumers are also increasingly moving toward ultra-matte finishes for wooden flooring. Delivering these finishes at the desired resistance levels is a key market challenge. And, as the market transitions from 2k to 1k systems, consumers expect the

new 1k systems to deliver the same performance as the 2K systems they're used to.

- **Interior paints.** Today's consumers look for flatter interior stuccoes and wall finishes, which can be more prone to visible marks. After staying inside for so long, many consumers are now willing to pay more for 'extras' such as scuff- and stain-resistance to make these finishes last longer. And for interior trim paints, there is a growing need for multi-substrate adhesion and applicability, 2-in-1 coatings with high-performance properties, and scratch-, grease-, metal- and stain resistance.

Expected benefits of matt wall paints, according to professional painters

Spontaneous answers only

		Germany	France	Netherlands	Norway	Sweden
n-175						
Good coverage/ hiding power	18%	14%	37%	9%	20%	11%
Smooth application & levelling	14%	23%	17%	23%	0%	9%
Stain resistant	12%	17%	26%	11%	0%	6%
Scratch resistant	11%	14%	29%	0%	6%	6%
Non lapping	11%	31%	0%	23%	0%	6%
Non burnishing / Non polishing	11%	9%	17%	9%	0%	0%
Good and lasting colours	10%	14%	14%	0%	11%	20%
Environmental friendly	9%	17%	26%	0%	0%	9%
Color preservation & intensity	8%	9%	17%	3%	3%	3%
Water/ vapor permeability	7%	3%	23%	0%	0%	9%
Scrub class 1	6%	9%	6%	17%	0%	9%
Does not smell	3%	3%	11%	3%	0%	0%
Other	16%	17%	3%	11%	31%	17%

Experienced problems when working with matt wall paints, according to professional painters

Spontaneous answers only

		Germany	France	Netherlands	Norway	Sweden
n-166						
Prone to scratches/ damages	11%	17%	6%	3%	11%	18%
Prone to stains	10%	14%	9%	3%	7%	18%
Bad coverage/ hiding power	8%	17%	0%	6%	11%	9%
Bad application an leveling	6%	0%	14%	6%	4%	6%
Bad end result	6%	6%	14%	3%	7%	0%
Formation of stripes ('baanvorming')	6%	14%	0%	12%	4%	0%
Burnishing & polishing spots	5%	0%	6%	9%	4%	9%
Bad colours/ do not last		3%	17%	0%	0%	0%
Not water/ vapor permeable		0%	6%	3%	0%	9%
Bad/ strong smell		0%	11%	0%	0%	0%
Bad colour preservation/ intensity		3%	9%	0%	0%	0%
Splashing of paint		0%	9%	0%	0%	0%
Not environmental friendly		0%	9%	0%	0%	0%
Dries up quickly		3%	3%	0%	0%	0%
Other		0%	3%	0%	18%	21%

Top desired features above and most common issues below for professional painters with ultra-matt wall paints

Expected benefits of matt lacquers, according to professional painters

Spontaneous answers only

		Germany	France	Netherlands	Norway	Sweden
n-175						
Good coverage/ hiding power	18%	31%	23%	17%	11%	9%
Smooth application & leveling	13%	11%	14%	23%	11%	6%
Quick drying time	10%	20%	17%	3%	3%	6%
Clean & wash ability	9%	0%	31%	6%	3%	6%
Good and lasting colours	9%	3%	20%	3%	6%	14%
Scratch resistant	7%	11%	11%	3%	3%	6%
Stain/ grease resistant	7%	11%	11%	9%	0%	3%
Usable for different surfaces	5%	3%	14%	3%	0%	6%
Does not stick when drying		3%	9%	0%	0%	0%
Anti-metal marking		0%	3%	0%	0%	3%
Good open time of product		3%	3%	0%	0%	0%
Other	17%	17%	3%	9%	29%	26%

Painters' most desired features in matt lacquer trim paints – including good coverage, smooth application, quick drying times, washability, stain/grease and scratch resistance.

Experienced problems when working with matt lacquers, according to consumers

Spontaneous answers only

		Germany	France	Netherlands	Norway	Sweden
n-181						
Long drying time	24%	28%	31%	19%	17%	25%
Bad coverage/ hiding power	18%	19%	25%	13%	22%	11%
Not usable for different surfaces	14%	17%	25%	11%	9%	4%
Prone to scratches	13%	15%	17%	11%	13%	7%
Bad application / leveling	12%	15%	11%	9%	9%	14%
Sticks when drying blocking	10%	11%	11%	15%	4%	7%
Bad and non lasting colours	10%	15%	11%	11%	0%	7%
Prone to stains/ greases	9%	13%	6%	9%	4%	14%
Product cannot be open for long time	8%	15%	3%	9%	0%	7%
Cannot be spray-applied	7%	4%	11%	6%	4%	11%
Metal marking		2%	0%	6%	0%	0%

Consumers' top issues with matt lacquer trim paints – including flaking, grease spots, multi-substrate applicability, odor, and polishing

- **Exterior paints.** In exterior wall paints, consumers desire improved durability in order to enable prolonged maintenance intervals. This has resulted in higher demand for properties such as low dirt pick-up, anti-fouling, anti-snail-trails, improved UV-resistance, and crack bridging properties. As the effects of climate change intensify, early rain resistance is also increasingly important.

Good durability is equally important in exterior trim paints. In addition, as the use of multiple substrates in building and construction becomes more popular, and climate change drives unexpected weather, consumers are now looking for multi-substrate adhesion and all-season applicability.


The market is also transitioning from solventborne to waterborne solutions, especially as waterborne solutions can now meet customers' needs around durability, gloss units, and applicability.


- **Light-duty metal.** In line with the DIY trend, some consumers are painting more outdoor fixtures themselves, driving the popularity of solutions that can easily coat metal surfaces. While this market is still dominated by solvent-borne systems, it is now undergoing a transition towards waterborne paints. In particular, direct-to-metal (DTM) and direct-to-rust paints with long-lasting performance are increasingly popular for both interior and exterior use.

Covestro's House of Resins: High-performance solutions for a variety of situations

At Covestro, we support our customers to deliver these solutions, providing development, formulation, and strategy advice through Insights to Innovations workshops and dialogs on sustainability and technical issues. We call this collaborative innovation approach our Decorative House of Resins. At the heart of this approach is our toolbox of advanced resin technologies – including waterborne acrylics, alkyds, urethanes, hybrids, tribrids, and partly-plant-based* resins.

Decorative House of Resins Enabling high-performance, more sustainable paints

 Click on the product names to see more information:



Interior deco wood coatings

Interior wall paint

Interior floor coating

Light duty metal paints

Exterior deco wood coatings

Exterior wall paint

Specialty solutions

NeoCryl® TX-203

Low-VOC, thixotropic acrylic to improve flow & leveling and avoid dripping

* Decovery® resins contain up to 52% bio-based content

Just some of these solutions that help our customers to deliver higher-performance solutions include:

For more info click on: [➔](#)

NeoCryl® HP-1000. This resin is ideal for meeting the need for improved adhesion regardless of the surface. Delivering enhanced adhesion on multiple substrates without the need for sanding, NeoCryl® HP-1000 ensures that paint systems can last for longer without flaking, peeling, or cracking. On top of this, it also offers quick drying times and a smooth flow and leveling.

Decovery® SP-8030. Containing around 43% bio-based content, this resin enables manufacturers to achieve improved hardness, reduced yellowing, and reduced odor – addressing some of the most common issues in both interior and exterior coatings. Despite Decovery® SP-8030 being a urethanized alkyd, we have been able to substitute the use of volatile amines and VOCs in its formulation. As a result, the resin offers EU Ecolabel compliance and limited general labeling requirements.

Decovery® SP-8310. Another resin in Covestro's bio-based Decovery® range with 37% bio-based content, Decovery® SP-8310 contributes heavily to outdoor durability because of its excellent UV resistance. Next to this, it also enables longer-lasting paint finishes, thanks to its enhanced breathability and flexibility.

NeoCryl® XK-117. This waterborne, high-solids styrene acrylic emulsion is the latest addition to our 'Direct 2 Metal' resin family. With its unique solid content level (51%), this high-performance solution delivers an exceptional body and a high gloss level, as well as excellent anti-corrosion and anti-humidity properties. What's more, NeoCryl® XK-117 comes with strong adhesion qualities, a high film build, and excellent hot-box and shear stability. And it's designed to be easy to formulate, enabling use in a wide range of DTM coating applications.



In conclusion...

Using these solutions, we support our customers to deliver the specialty solutions that consumers are looking for – from high-performance 1k systems to direct-to-metal coatings.

As the popularity of DIY continues to increase, the use of multiple substrates becomes more popular, weather becomes more unpredictable, and consumer expectations continue to evolve, we'll be here to help our partners adapt and develop new solutions – all the way from insights to innovations.

To find out how our Decorative House of Resins can help you deliver the high-performance specialty solutions that consumers expect, or to book one of our workshops: discovery.covestro.com



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¹Please see the "Guidance on Use of Covestro Products in a Medical Application" document.
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