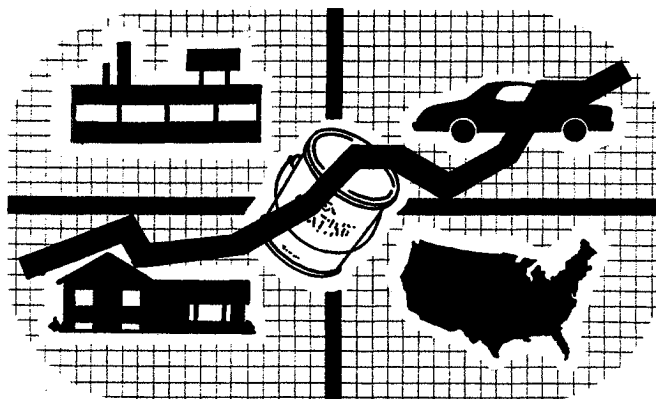
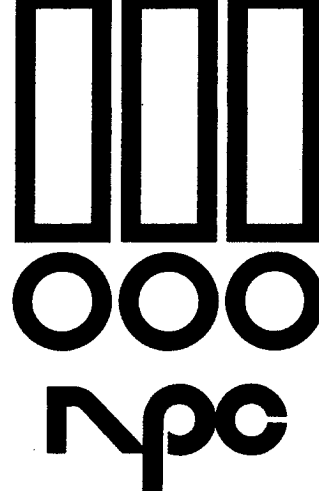


Sales Survey

For the year

1974



ROUTE TO:
Department

Finance		
Administration		
Sales		
Technical		
Production		

INTRODUCTION AND EXPLANATION

This report presents the results of the Thirteenth Sales Survey of the National Paint and Coatings Association. It was originated to fulfill a basic need for sales statistics in order to measure the size and trends of important markets of our industry. Before this survey was undertaken, the paint industry had no current statistics available on its many important end-use markets.

COVERAGE OF THE TOTAL INDUSTRY - A total of 87 companies cooperated in this survey. Based on the annual totals reported by the Bureau of the Census, the NPCA Sales Survey accounted for 54.6 percent of the industry's dollar sales in 1974. The detailed comparisons of the NPCA Sales Survey totals with Bureau of the Census are presented in Tables VII and VIII. They show that our Survey has covered a consistent cross section of the overall industry.

Coverage -- NPCA Survey vs. Total Industry

	<u>Gallons</u>	<u>Dollars</u>
Trade Sales	48.3%	59.5%
Chemical Coatings	42.2%	45.1%
Total	46.8%	54.6%

END USES FOR TRADE, CHEMICAL COATINGS AND SPECIAL MAINTENANCE-- Table I shows reported sales to nearly one hundred different end-use markets of our industry. The end-use categories were devised by the Management Information Committee with the aid of suggestions from and consultation with, a wide cross section of manufacturers. While coverage is not yet equally consistent in each individual category, this valuable table does indicate the relative importance of every major market of our industry. In an effort to obtain a clear picture of the Special Maintenance portion of our industry, we have separated this classification from the Chemical Coatings portion of this table.

A NOTE OF CAUTION! Care must be exercised in the use of the data in Tables I, II, and III, Charts B, C and D. While the figures suggest the order of magnitude of each end use, individual lines cannot safely be extrapolated to 100 percent without some distortion and possible misleading results. Until a larger proportion of our Membership participates, it cannot be safely assumed that the Survey accounts for 54.6% of total industry dollar sales overall. Actually 59.5% of Trade Sales are accounted for, and 45.1% of Chemical Coatings. Similarly, coverage in some individual line categories may be significantly higher than the total of 54.6%, while others are probably significantly less.

SALES TRENDS - Table IV shows a comparison of the reports of 45 companies that reported for 1970, 1971, 1972, 1973, and 1974. While the percentages of change shown in Table IV add greatly to the understanding and application of Table I, it must be emphasized that the changes indicated DO NOT necessarily represent the picture of the entire industry. The companies included in this sample account for 41% of the total sales in the industry; however, we have no way at this time of measuring the total sales in each line. Extreme caution must be exercised when using this information.

July 1975

MANAGEMENT INFORMATION COMMITTEE

C.W. MANN, JR., Chairman
Baltimore Paint & Chemical Corp.
B.F. MAUTZ, JR., Vice Chairman
Mautz Paint Co.

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CLYDE L. BURTT
Reliance Universal, Inc.
E. ARTHUR COWMAN
Cowman-Campbell Paint Co.
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The Southern Protective Products Co.
PETER H. HESS
The Flecto Company, Inc.
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Kurfees Coatings, Inc.

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JOHN C. OLSON
DeSoto, Inc.
JEROME R. PARENTEAU
Colony Paints Div., Conchemco
ROBERT A. POWRIE
E.I. duPont De Nemours & Co.
LOUIS A. PROSCH, JR.
Indurall Coatings, Inc.
LEO T. RYAN
Southeastern Steel Container Co.
CLYDE L. SMITH
Ameritone Paint Corporation
WILLIAM T. SMITH
The Goodyear Tire & Rubber Co.
ROBERT F. VICKROY
Durako Paint & Color Corp.
JOHN G. WAGNER
Glidden-Durkee Div., of SCM
JOSEPH M. WALTON
Jamestown Paint & Varnish Co.
ROBERT W. WESSON
Union Carbide Corporation

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How our 1974 SALES SURVEY compares with U.S. CENSUS totals Trade Sales vs. Chemical Coatings

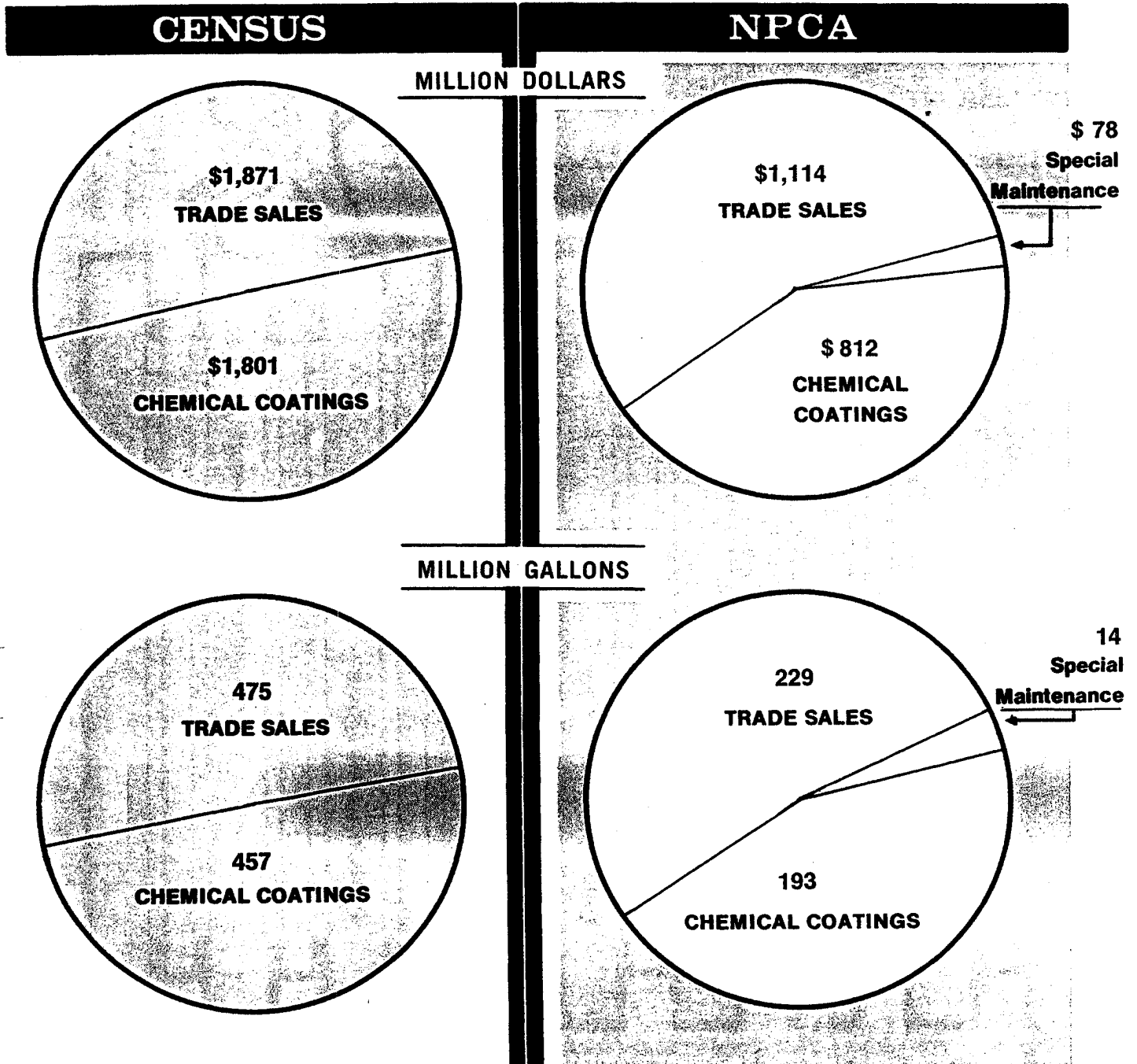


CHART B



How our 1974 Sales Survey showed
TRADE SALES paints were used . . .

(Based on data reported on long form)

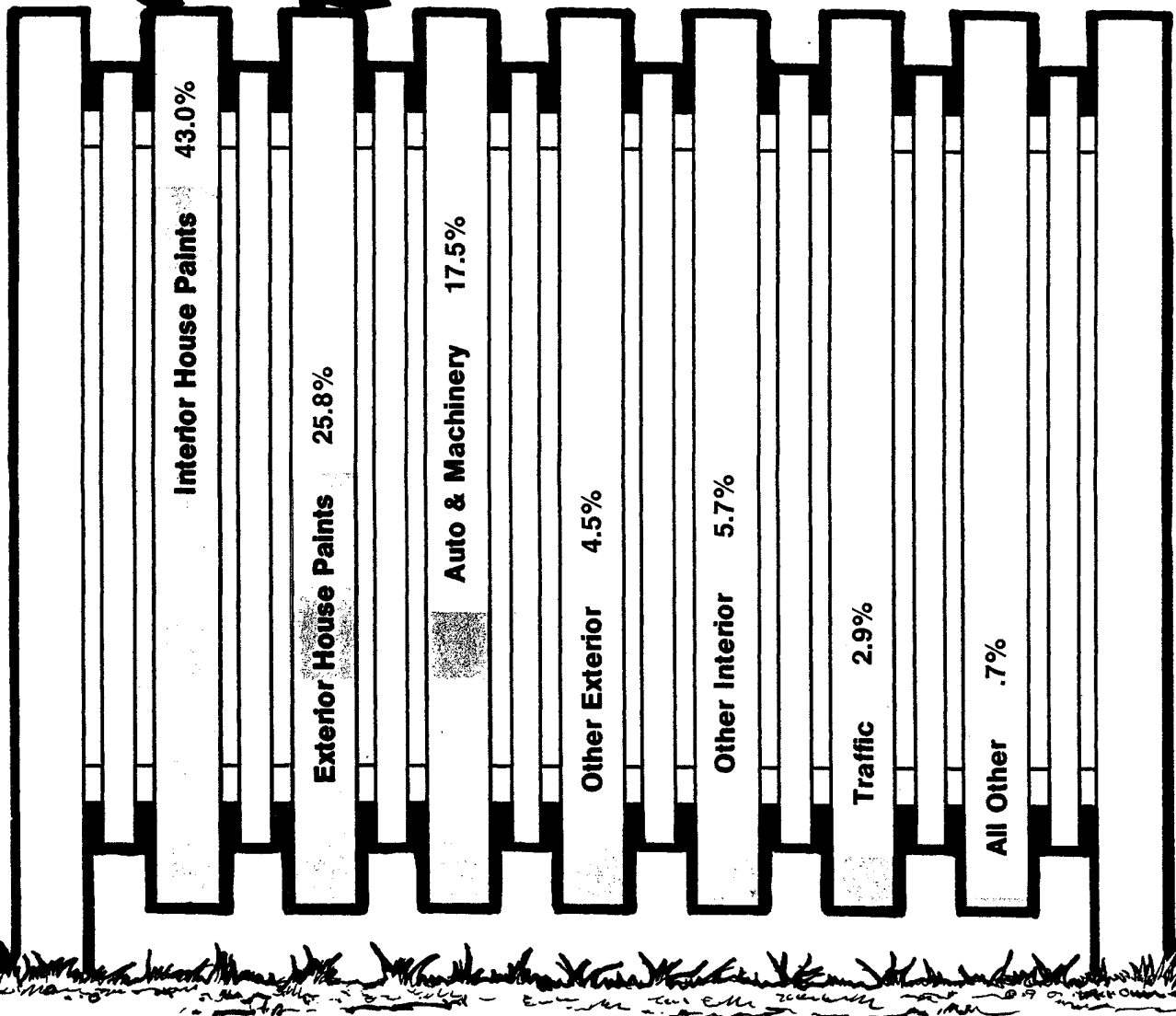


CHART C

How our 1974 Sales Survey showed CHEMICAL COATINGS were used...

(Based on data reported on long form)

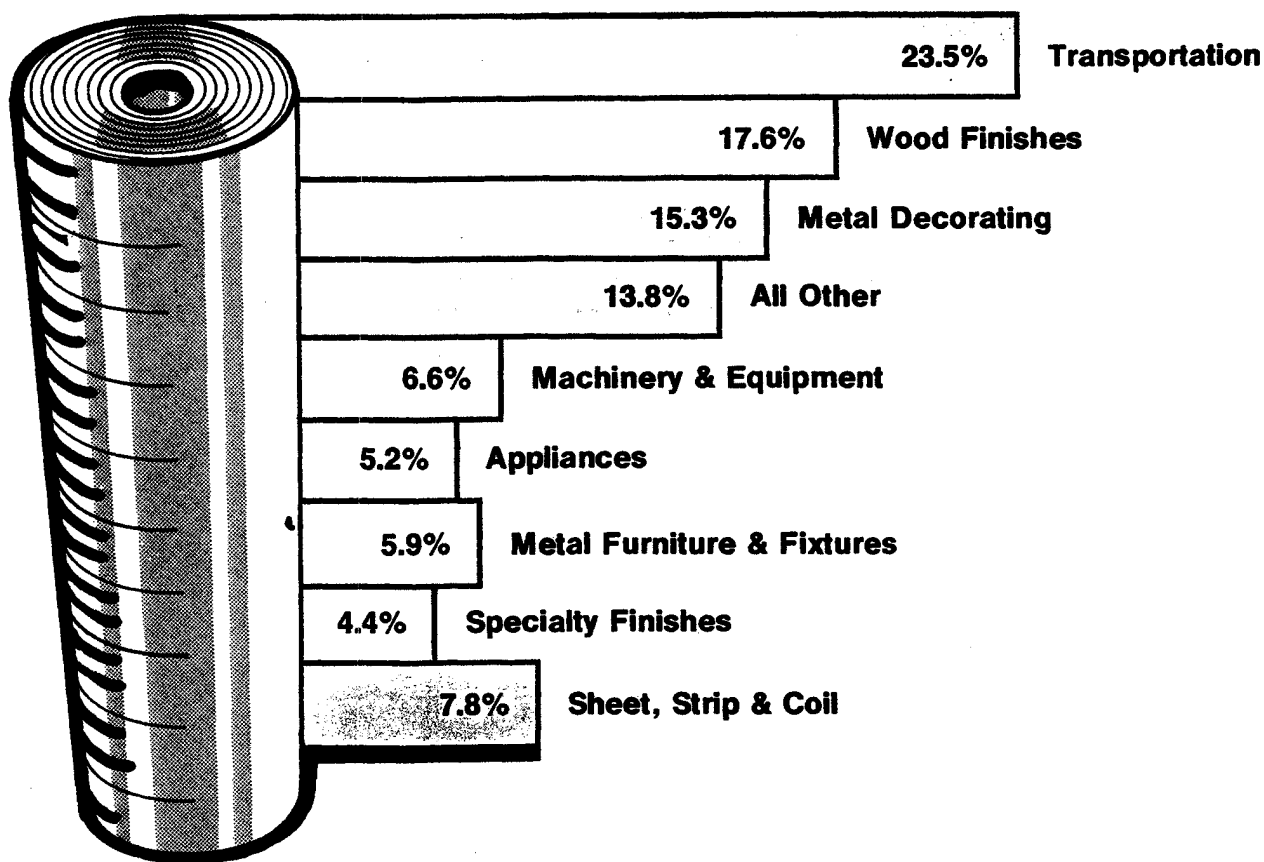


TABLE I

- LONG FORM -

REPORTED SALES BY END USE - 1974

78 Companies Reporting

TRADE SALES PRODUCTS

		TOTAL SALES	
		Thousands of Gallons	Thousands of Dollars
<u>EXTERIOR PAINTS</u>			
<u>EXTERIOR HOUSE PAINTS</u>			
101.	Oil and Alkyd House Paints and Tinting Bases	10,653	61,685
WATER EMULSIONS PAINTS & TINTING BASES			
102.	All Purpose Water Emulsions Paints (1)	33,231	148,316
103.	Masonry Water Emulsion Paints	2,158	9,667
104.	Total Water Emulsions Paints	35,389	157,983
ENAMELS AND TINTING BASES (2)			
109.	Sash, Trim and Trellis Enamels	1,030	6,069
110.	Porch and Deck Enamels (Incl. Int.-Ext. Floor Enamels)	4,775	23,602
111.	Total Enamels and Tinting Bases	5,805	29,671
112.	Undercoaters, Primers and Sealers	2,521	13,227
113.	Other Exterior House Paints (Incl. Other Water Thinned Paints and Paste in Oil)	1,379	7,431
114.	TOTAL EXTERIOR HOUSE PAINTS	55,747	269,997
<u>MISCELLANEOUS EXTERIOR PAINTS</u>			
115.	Barn and Fence Paints	938	3,950
117.	Roof Coatings	4,057	5,160
METALLIC PIGMENTED PAINTS			
118.	Aluminum	737	3,570
119.	Zinc and Other Metallic Pigmented Paints	85	679
120.	Total Metallic Pigmented Paints	822	4,249
121.	Stains (Incl. Shingles and Shakes)	4,678	19,819
122.	Varnishes, Natural and Synthetic	1,651	8,163
123.	Other Exterior Paints (Incl. Multicolored Paints and Bituminous Paints)	986	5,431
124.	TOTAL MISCELLANEOUS EXTERIOR PAINTS	13,132	46,772
125.	TOTAL -- ALL EXTERIOR PAINTS	68,879	316,769

(1) Exterior-Interior Water Emulsion Paints included with All Purpose Water Emulsion Paints (line 133)

(2) Exterior-Interior, Quick-Drying Enamels with Interior Types (line 128)

TABLE I

(Continued)

TRADE SALES PRODUCTS

		<u>TOTAL SALES</u>	
		<u>Thousands of Gallons</u>	<u>Thousands of Dollars</u>
<u>INTERIOR PAINTS</u>			
<u>INTERIOR HOUSE PAINTS</u>			
126.	Oil and Alkyd Wall Paints and Tinting Bases-Flat	3,502	15,859
127.	Oil and Alkyd Paints and Tinting Bases-Semi-Gloss	10,155	56,561
128.	Oil and Alkyd Gloss and Quick-Drying Enamels and Tinting Bases	4,865	31,679
<u>READY-MIXED WATER EMULSION PAINTS AND TINTING BASES</u>			
130.	Water Emulsion Paints and Tinting Bases-Flat	58,071	229,237
131.	Water Emulsion Paints and Tinting Bases-Semi-Gloss	15,554	73,111
132.	Water Emulsion Paints and Tinting Bases-Gloss	1,952	12,932
133.	All-Purpose Water Emulsion Paints (Incl. Ext.-Int. Types)	996	4,133
134.	Total Ready-Mixed Water Emulsion Paints	76,573	319,413
135.	Undercoaters, Primers and Sealers	3,977	18,043
138.	Other Interior House Paints	1,958	8,662
141.	TOTAL INTERIOR HOUSE PAINTS	101,030	450,217
<u>MISCELLANEOUS INTERIOR PAINTS</u>			
<u>VARNISHES - SYNTHETIC AND NATURAL</u>			
142.	Satin	1,271	8,330
143.	Gloss	1,809	9,928
145.	Stains	2,109	10,749
146.	Ceramic, Glaze, Tile-like Coatings	781	7,103
147.	Seamless Systems	61	440
148.	Multicolored Paints	231	2,057
149.	Colorants (Incl. Colors in Oil)	1,567	16,899
151.	Fire Retardant Paints	136	995
152.	Other Interior Paints	772	3,117
154.	TOTAL MISCELLANEOUS INTERIOR PAINTS	8,737	59,618
155.	TOTAL -- ALL INTERIOR PAINTS	109,767	509,835
156.	TOTAL EXTERIOR AND INTERIOR TRADE SALES PAINTS	178,646	826,604
<u>OTHER TRADE SALES FINISHES</u>			
157.	Automotive and Machinery Refinish Paints, Lacquers, Enamels (Int. & Ext.)	22,289	164,321
158.	Automotive and Machinery Refinish Primers and Undercoaters (Int. & Ext.)	3,400	18,669
159.	Traffic Paints (all types, whether shelf goods or highway depts.)	9,239	30,000
160.	Exterior Marine Paints and Enamels (Shelf goods only)	67	555
161.	Interior Marine Paints and Enamels (Shelf goods only)	2	7
162.	Government Specifications Paints (Other than Traffic- Incl. Military, Federal, State and Local)	812	3,252
163.	Not Elsewhere Classified	710	2,991
164.	TOTAL OTHER TRADE SALES FINISHES	36,519	219,795
165.	GRAND TOTAL -- TRADE SALES PRODUCTS	215,165	1,046,399

TABLE I
(Continued)
CHEMICAL COATINGS PRODUCTS

		TOTAL SALES	
		Thousands of Gallons	Thousands of Dollars
<u>INDUSTRIAL PRODUCT FINISHES</u>			
201.	Wood Furniture and Fixtures	29,296	85,991
202.	Wood and Composition Flat Stock	15,745	53,956
203.	Metal Furniture and Fixtures (Incl. Office Furniture)	11,795	46,836
METAL DECORATING			
204.	Containers and Closures	26,353	103,203
205.	Other Metal Decorating (Incl. Lithograph Toys)	4,929	18,253
206.	Total Metal Decorating	31,282	121,456
207.	Sheet, Strip and Coil Coatings (Incl. Siding)	12,351	62,298
APPLIANCES			
208.	Major Household	5,923	28,691
209.	Small Household	605	5,096
210.	Heaters and Air Conditioners	1,623	7,476
211.	Total Appliances	8,151	41,263
TRANSPORTATION - ORIGINAL EQUIPMENT			
212.	Automobile	29,989	143,890
213.	Trucks and Buses	4,059	20,083
214.	Railroads	3,331	13,603
215.	Aircrafts, Rockets and Missiles	547	5,590
216.	Other Transportation	889	3,541
217.	Total Transportation - Original Equipment	38,815	186,707
218.	Toys, Sporting Goods, Gym and Baby Equipment	923	4,687
MACHINERY AND EQUIPMENT			
219.	Electrical and Electronic Machinery and Equipment	3,949	17,740
220.	Insulating Varnish (Incl. Magnet Wire Enamels)	529	4,353
221.	Stationary Machinery and Machine Tools	1,840	6,995
222.	Farm Construction, Earthmoving, etc.	3,795	16,970
223.	Other Machinery and Equipment	1,398	6,282
224.	Total Machinery and Equipment	11,511	52,340
MARINE FINISHES			
226.	Pleasure Crafts (Original Only)	821	5,111
227.	Commercial (Original and Refinish)	2,536	17,098
228.	Total Marine Finishes	3,357	22,209
FINISHES AND COATINGS FOR SPECIAL SUBSTRATES			
229.	Paper and Paper Board	3,812	15,142
230.	Flexible Packaging - Film and Foil	1,670	6,714
231.	Other Finishes and Coatings for Special Substrates (Incl. Leather Finishes)	3,708	13,416
232.	Total Finishes and Coatings for Special Substrates	9,190	35,272
OTHER CHEMICAL COATINGS			
233.	General Metal Finishes (Incl. Structural Steel)	5,305	21,407
234.	Government Specification Paints (Other than Traffic)	1,037	4,942
235.	Other	10,160	56,708
238.	Total Other Chemical Coatings	16,502	83,057
239.	TOTAL -- INDUSTRIAL PRODUCT FINISHES	188,918	796,072

TABLE I

(Continued)

MAINTENANCE PAINTS

		TOTAL SALES	
		Thousands of Gallons	Thousands of Dollars
<u>MAINTENANCE PAINTS</u>			
250.	Exterior Maintenance Paints	4,289	21,646
251.	Interior Maintenance Paints	4,797	14,332
252.	Other Maintenance Paints	1,877	11,286
260.	TOTAL MAINTENANCE PAINTS	10,963	47,264
301.	GRAND TOTAL -- TRADE SALES PRODUCTS, CHEMICAL COATINGS PRODUCTS, AND MAINTENANCE PAINTS:	415,046	1,889,735

TABLE II

SALES SURVEY SHORT FORM

FOR THE YEAR 1974
(9 Companies Reporting)

		GALLONS (000)	DOLLARS (000)
	<u>TRADE SALES</u>		
114.	<u>EXTERIOR HOUSE PAINTS</u>		
	Solvent Thinned	2,017	11,686
	Water Thinned	3,481	19,333
	TOTAL	5,498	31,019
141.	<u>INTERIOR HOUSE PAINTS</u>		
	Solvent Thinned	1,579	9,231
	Water Thinned	5,790	30,160
	TOTAL	7,369	39,391
163.	OTHER TRADE SALES FINISHES	1,042	6,203
164.	TOTAL TRADE SALES	13,909	76,613
	<u>CHEMICAL COATINGS</u>		
201.	Wood Furniture & Fixtures	666	1,744
202.	Wood & Composition Flat Stock	19	64
203.	Metal Furniture & Fixtures	155	603
206.	Metal Decorating	56	230
207.	Sheet, Strip & Coil Coatings	--	--
211.	Appliances	321	1,090
217.	Transportation	1,214	4,839
218.	Toys, Sporting Goods, Gym & Baby Equipment	153	579
224.	Machinery & Equipment	167	621
228.	Marine Finishes	299	3,278
232.	Special Substrates Finishes	802	2,922
238.	Other	85	279
239.	TOTAL CHEMICAL COATINGS	3,937	16,249
260.	MAINTENANCE PAINTS	3,159	30,856
301.	GRAND TOTAL	21,005	123,718

TABLE III

GRAND TOTALS

(TABLE I PLUS TABLE II)
(87 Companies Reporting)

		Gallons (000)	Dollars (000)
<u>TRADE SALES</u>			
114.	<u>EXTERIOR HOUSE PAINTS</u>		
	Solvent Thinned	12,670	73,371
	Water Thinned	38,870	177,316
	TOTAL	51,540	250,687
141.	<u>INTERIOR HOUSE PAINTS</u>		
	Solvent Thinned	20,101	104,099
	Water Thinned	82,363	349,573
	TOTAL	102,464	453,672
163.	OTHER TRADE SALES FINISHES	75,070	409,422
164.	TOTAL TRADE SALES	229,074	1,113,781
<u>CHEMICAL COATINGS</u>			
201.	Wood Furniture & Fixtures	29,962	87,735
202.	Wood & Composition Flat Stock	15,764	54,020
203.	Metal Furniture & Fixtures	11,950	47,439
206.	Metal Decorating	31,338	121,686
207.	Sheet, Strip & Coil Coatings	12,351	62,298
211.	Appliances	8,472	42,353
217.	Transportation	40,029	191,546
218.	Toys, Sporting Goods, Gym & Baby Equipment	1,076	5,266
224.	Machinery & Equipment	11,678	52,961
228.	Marine Finishes	3,656	25,487
232.	Special Substrates Finishes	9,992	38,194
238.	Other	16,587	83,336
239.	TOTAL CHEMICAL COATINGS	192,855	812,321
260.	MAINTENANCE PAINTS	14,122	78,120
301.	GRAND TOTAL	436,051	2,004,222

TABLE IV
TRADE SALES PRODUCTS

GROWTH TRENDS -- 1971-1972-1973-1974

Index Base: 1970=100

	D O L L A R S			
	1971	1972	1973	1974
<u>EXTERIOR PAINTS</u>				
<u>EXTERIOR HOUSE PAINTS</u>				
101. Oil and Alkyd House Paints and Tinting Bases	101.7	107.4	107.6	103.0
<u>WATER EMULSIONS PAINTS AND TINTING BASES</u>				
102. All Purpose Water Emulsions Paints (1)	112.0	124.7	139.9	156.0
103. Masonry Water Emulsion Paints	139.0	141.2	154.7	147.6
104. Total Water Emulsions Paints	114.0	126.0	141.0	155.4
<u>ENAMELS AND TINTING BASES (2)</u>				
109. Sash, Trim and Trellis Enamels	88.6	85.2	77.5	62.1
110. Porch and Deck Enamels (Int.-Ext. Floor enamels)	103.4	109.2	109.4	118.5
111. Total Enamels and Tinting Bases	100.1	103.8	102.3	105.9
112. Undercoaters, Primers and Sealers	103.1	103.9	104.8	114.9
113. Other Exterior House Paints (Incl. Other Water Thinned Paints and Paste in Oil)	88.5	83.7	75.7	116.1
114. TOTAL EXTERIOR HOUSE PAINTS	107.3	115.3	122.3	128.8
<u>MISCELLANEOUS EXTERIOR PAINTS</u>				
115. Barn and Fence Paints	111.4	111.7	103.9	110.3
117. Roof Coatings	103.1	116.5	90.7	74.0
<u>METALLIC PIGMENTED PAINTS</u>				
118. Aluminum	113.6	96.9	103.8	120.2
119. Zinc and Other Metallic Pigmented Paints	120.4	130.8	121.3	160.6
120. Total Metallic Pigmented Paints	114.2	100.2	105.5	124.0
121. Stains (Incl. Shingles and Shakes)	116.8	161.9	197.0	273.1
122. Varnishes, Natural and Synthetic	125.7	147.8	150.0	136.5
123. Other Exterior Paints (Incl. Multicolored Paints and Bituminous Paints)	103.3	102.2	117.2	94.4
124. TOTAL MISCELLANEOUS EXTERIOR PAINTS	108.9	125.9	136.2	162.2
125. TOTAL -- ALL EXTERIOR PAINTS	107.5	116.6	123.9	132.7

(1) Exterior-Interior Water Emulsion Paints included with All Purpose Water Emulsions Paints (line 133)

(2) Exterior-Interior, Quick-Drying Enamels with Interior Types (line 128)

TABLE IV

(Continued)

TRADE SALES PRODUCTS

GROWTH TRENDS -- 1971-1972-1973-1974

Index Base: 1970=100

		D O L L A R S			
		1971	1972	1973	1974
<u>INTERIOR PAINTS</u>					
<u>INTERIOR HOUSE PAINTS</u>					
126.	Oil and Alkyd Wall Paints and Tinting Bases-Flat	103.4	78.9	77.3	88.6
127.	Oil and Alkyd Paints and Tinting Bases-Semi-Gloss	98.4	109.4	113.4	150.1
128.	Oil and Alkyd Gloss and Quick-Drying Enamels and Tinting Bases	104.8	102.0	98.8	75.1
<u>READY-MIXED WATER EMULSION PAINTS AND TINTING BASES</u>					
130.	Water Emulsion Paints and Tinting Bases-Flat	105.8	115.2	117.2	128.3
131.	Water Emulsion Paints and Tinting Bases-Semi-Gloss	119.5	146.4	169.5	247.6
132.	Water Emulsion Paints and Tinting Bases-Gloss	*	*	*	*
133.	All-Purpose Water Emulsion Paints (Incl. Ext.-Int. Types)	106.8	12.0	14.9	35.8
134.	Total Ready-Mixed Water Emulsion Paints	107.4	118.5	123.5	145.2
135.	Undercoaters, Primers and Sealers	86.5	105.4	98.1	125.3
138.	Other Interior House Paints	110.2	291.9	169.1	199.6
141.	TOTAL INTERIOR HOUSE PAINTS	105.1	111.9	114.3	132.4
<u>MISCELLANEOUS INTERIOR PAINTS</u>					
<u>VARNISHES - SYNTHETIC AND NATURAL</u>					
142.	Satin	85.0	72.5	92.5	109.9
143.	Gloss	104.8	102.2	98.2	74.6
145.	Stains	108.4	114.7	154.2	164.5
146.	Ceramic, Glaze, Tile-like Coatings	105.6	114.2	113.1	109.9
147.	Seamless Systems	10.6	8.9	9.1	7.4
148.	Multicolored Paints	192.5	214.5	199.6	219.9
149.	Colorants (Incl. Colors in Oil)	110.4	185.7	211.2	268.1
151.	Fire Retardant Paints	15.1	13.1	22.9	20.3
152.	Other Interior Paints	109.6	132.0	129.6	5.6
154.	TOTAL MISCELLANEOUS INTERIOR PAINTS	101.6	116.6	124.9	106.5
155.	TOTAL -- ALL INTERIOR PAINTS	104.6	112.5	115.7	127.1
156.	TOTAL EXTERIOR AND INTERIOR TRADE SALES PAINTS	105.6	114.0	118.6	130.4
<u>OTHER TRADE SALES FINISHES</u>					
157.	Automotive and Machinery Refinish Paints, Lacquers, Enamels (Int. & Ext.)	112.2	120.4	141.6	146.0
158.	Automotive and Machinery Refinish Primers and Undercoaters (Int. & Ext.)	114.6	207.8	247.6	149.2
159.	Traffic Paints (all types, whether shelf goods or highway depts.)	139.7	8.9	11.2	312.9
160.	Exterior Marine Paints and Enamels (Shelf goods only)	32.5	562.5	55.0	*
161.	Interior Marine Paints and Enamels (Shelf goods only)	79.2	*	*	*
162.	Government Specifications Paints (Other than Traffic-Incl. Military, Federal, State and Local)	98.7	111.0	125.5	46.7
163.	Not Elsewhere Classified	*	*	*	*
164.	TOTAL OTHER TRADE SALES FINISHES	113.8	120.9	141.5	156.5
165.	GRAND TOTAL -- TRADE SALES PRODUCTS	107.4	115.5	123.6	136.1

TABLE IV

(continued)

CHEMICAL COATINGS PRODUCTS

GROWTH TRENDS -- 1971-1972-1973-1974

Index Base: 1970=100

		D O L L A R S			
		1971	1972	1973	1974
<u>INDUSTRIAL PRODUCT FINISHES</u>					
201.	Wood Furniture and Fixtures	102.0	112.8	134.7	150.2
202.	Wood and Composition Flat Stock	127.2	166.8	165.7	258.9
203.	Metal Furniture and Fixtures (Incl. Office Furniture)	96.6	111.0	112.1	122.9
METAL DECORATING					
204.	Containers and Closures	98.5	102.6	107.1	124.5
205.	Other Metal Decorating (Incl. Lithograph Toys)	98.7	105.9	97.0	246.5
206.	Total Metal Decorating	98.5	103.1	105.6	142.4
207.	Sheet, Strip and Coil Coatings (Incl. Siding)	121.1	139.9	160.1	169.8
APPLIANCES					
208.	Major Household	95.4	54.9	62.6	70.5
209.	Small Household	98.3	239.0	267.5	259.3
210.	Heaters and Air Conditioners	90.3	90.1	83.4	69.2
211.	Total Appliances	94.9	68.3	75.1	79.4
TRANSPORTATION - ORIGINAL EQUIPMENT					
212.	Automobile	125.3	140.4	184.4	162.3
213.	Trucks and Buses	119.7	140.4	164.5	155.8
214.	Railroads	93.1	76.5	95.4	107.7
215.	Aircrafts, Rockets and Missiles	76.2	72.1	43.5	38.0
216.	Other Transportation	230.2	250.7	195.1	257.6
217.	Total Transportation - Original Equipment	120.1	130.9	168.0	152.7
218.	Toys, Sporting Goods, Gym and Baby Equipment	105.3	134.6	138.0	155.5
MACHINERY AND EQUIPMENT					
219.	Electrical and Electronic Machinery and Equipment	91.7	92.4	116.1	139.4
220.	Insulating Varnish (Incl. Magnet Wire Enamels)	92.5	109.8	106.6	114.1
221.	Stationary Machinery and Machine Tools	88.4	97.0	94.1	77.7
222.	Farm Construction, Earthmoving, etc.	106.4	119.7	136.4	159.8
223.	Other Machinery and Equipment	369.9	444.9	610.9	306.0
224.	Total Machinery and Equipment	103.5	114.3	130.9	138.5
MARINE FINISHES					
226.	Pleasure Crafts (Original Only)	104.6	57.9	58.4	72.8
227.	Commercial (Original and Refinish)	111.5	49.6	49.8	50.2
228.	Total Marine Finishes	107.5	54.4	54.8	63.3
FINISHES AND COATINGS FOR SPECIAL SUBSTRATES					
229.	Paper and Paper Board	108.5	87.9	81.4	77.1
230.	Flexible Packaging - Film and Foil	139.0	210.5	240.6	262.2
231.	Other Finishes and Coatings for Special Substrates (Incl. Leather Finishes)	148.8	160.7	207.1	167.5
232.	Total Finishes and Coatings for Special Substrates	116.4	103.6	107.4	97.4
OTHER CHEMICAL COATINGS					
233.	General Metal Finishes (Incl. Structural Steel)	115.5	153.4	269.2	306.7
234.	Government Specification Paints (Other than Traffic)	90.4	110.6	118.1	33.0
235.	Other	120.7	257.2	285.0	428.5
238.	Total Other Chemical Coatings	113.4	207.3	247.2	323.8
239.	TOTAL -- INDUSTRIAL PRODUCT FINISHES	108.7	119.4	137.7	150.4

TABLE IV

(Continued)

MAINTENANCE PAINTS

GROWTH TRENDS -- 1971-1972-1973-1974

Index Base: 1970=100

	D O L L A R S			
	1971	1972	1973	1974
<u>MAINTANCE PAINTS</u>				
250. Exterior Maintenance Paints	94.3	94.1	94.3	141.5
251. Interior Maintenance Paints	103.3	108.8	108.5	262.5
252. Other Maintenance Paints	100.7	168.7	174.2	203.0
260. TOTAL MAINTENANCE PAINTS	97.5	113.3	114.6	179.6
301. GRAND TOTAL -- (Line 165,239 AND 260)	107.6	116.8	128.5	142.3

BUREAU OF THE CENSUS

TRADE SALES	104.3	110.8	110.8	124.9
CHEMICAL COATINGS	102.3	108.9	118.9	145.4
TOTAL:	103.4	109.9	114.5	134.2

TABLE IV
TRADE SALES PRODUCTS

GROWTH TRENDS -- 1971-1972-1973-1974

Index Base: 1970=100

		<u>G A L L O N S</u>			
		<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>
<u>EXTERIOR PAINTS</u>					
<u>EXTERIOR HOUSE PAINTS</u>					
101.	Oil and Alkyd House Paints and Tinting Bases	105.1	113.8	105.7	87.9
<u>WATER EMULSIONS PAINTS AND TINTING BASES</u>					
102.	All Purpose Water Emulsions Paints (1)	111.5	127.3	136.3	140.3
103.	Masonry Water Emulsion Paints	143.7	149.6	149.9	131.2
104.	Total Water Emulsions Paints	114.1	129.1	137.4	139.6
<u>ENAMELS AND TINTING BASES (2)</u>					
109.	Sash, Trim and Trellis Enamels	95.3	94.9	82.1	57.2
110.	Porch and Deck Enamels (Incl. Int.-Ext. Floor Enamels)	105.6	112.5	109.0	102.1
111.	Total Enamels and Tinting Bases	103.7	109.2	103.9	93.7
112.	Undercoaters, Primers and Sealers	102.8	106.1	103.2	89.3
113.	Other Exterior House Paints (Incl. Other Water Thinned Paints and Paste in Oil)	90.0	87.9	82.1	86.8
114.	TOTAL EXTERIOR HOUSE PAINTS	109.2	120.2	121.0	114.5
<u>MISCELLANEOUS EXTERIOR PAINTS</u>					
115.	Barn and Fence Paints	110.0	111.0	97.6	82.3
117.	Roof Coatings	98.5	32.0	50.9	29.2
<u>METALLIC PIGMENTED PAINTS</u>					
118.	Aluminum	111.6	98.0	104.2	101.8
119.	Zinc and Other Metallic Pigmented Paints	136.6	141.5	122.0	131.7
120.	Total Metallic Pigmented Paints	113.9	101.5	105.6	104.3
121.	Stains (Incl. Shingles and Shakes)	124.4	168.1	191.3	204.9
122.	Varnishes, Natural and Synthetic	106.0	135.4	126.0	130.9
123.	Other Exterior Paints (Incl. Multicolored Paints and Bituminous Paints)	109.1	106.0	118.0	75.3
124.	TOTAL MISCELLANEOUS EXTERIOR PAINTS	111.6	115.1	122.5	118.1
125.	TOTAL -- ALL EXTERIOR PAINTS	109.5	119.4	121.2	115.0

(1) Exterior-Interior Water Emulsion Paints included with All Purpose Water Emulsions Paints (line 133)

(2) Exterior-Interior, Quick-Drying Enamels with Interior Types (line 128)

TABLE IV

(Continued)

TRADE SALES PRODUCTS

GROWTH TRENDS -- 1971-1972-1973-1974

Index Base: 1970=100

G A L L O N S	1971	1972	1973	1974
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INTERIOR HOUSE PAINTS				
126.	Oil and Alkyd Wall Paints and Tinting Bases-Flat	101.7	88.3	89.8
127.	Oil and Alkyd Paints and Tinting Bases-Semi-Gloss	98.8	114.9	112.2
128.	Oil and Alkyd Gloss and Quick-Drying Enamels and Tinting Bases	103.0	105.5	102.4
READY-MIXED WATER EMULSION PAINTS AND TINTING BASES				
130.	Water Emulsion Paints and Tinting Bases-Flat	107.5	123.2	117.6
131.	Water Emulsion Paints and Tinting Bases-Semi-Gloss	115.2	148.4	164.8
132.	Water Emulsion Paints and Tinting Bases-Gloss	*	*	*
133.	All-Purpose Water Emulsion Paints (Incl. Ext.-Int. Types)	116.9	22.5	27.9
134.	Total Ready-Mixed Water Emulsion Paints	108.6	125.9	123.0
135.	Undercoaters, Primers and Sealers	84.5	95.9	89.4
138.	Other Interior House Paints	116.7	326.0	183.3
141.	TOTAL INTERIOR HOUSE PAINTS	105.6	116.5	115.1
MISCELLANEOUS INTERIOR PAINTS				
VARNISHES - SYNTHETIC AND NATURAL				
142.	Satin	101.9	81.0	89.0
143.	Gloss	104.8	105.7	100.1
145.	Stains	107.1	126.7	145.0
146.	Ceramic, Glaze, Tile-Like Coatings	108.9	124.7	116.4
147.	Seamless Systems	12.8	13.8	13.8
148.	Multicolored Paints	138.2	183.0	104.7
149.	Colorants (Incl. Colors in Oil)	108.1	171.7	237.7
151.	Fire Retardant Paints	27.6	17.9	24.4
152.	Other Interior Paints	109.8	129.1	125.9
154.	TOTAL MISCELLANEOUS INTERIOR PAINTS	104.1	117.7	118.8
155.	TOTAL -- ALL INTERIOR PAINTS	105.4	118.4	115.6
156.	TOTAL EXTERIOR AND INTERIOR TRADE SALES PAINTS	106.8	118.7	117.5
OTHER TRADE SALES FINISHES				
157.	Automotive and Machinery Refinish Paints, Lacquers, Enamels (Int. & Ext.)	106.4	124.1	135.2
158.	Automotive and Machinery Refinish Primers and Undercoaters (Int. & Ext.)	100.6	333.8	405.6
159.	Traffic Paints (all Types, whether shell goods or highway depts.)	138.4	6.5	8.2
160.	Exterior Marine Paints and Enamels (Shell goods only)	28.6	471.4	57.1
161.	Interior Marine Paints and Enamels (Shell goods only)	63.6	*	*
162.	Government Specifications Paints (Other than Traffic-Incl. Military, Federal, State and Local)	102.0	129.4	139.4
163.	Not Elsewhere Classified	*	*	*
164.	TOTAL OTHER TRADE SALES FINISHES	111.4	127.7	143.9
165.	GRAND TOTAL -- TRADE SALES PRODUCTS	107.7	120.4	122.3
				118.3

TABLE IV

(Continued)

CHEMICAL COATINGS PRODUCTS

GROWTH TRENDS -- 1971-1972-1973-1974

Index Base: 1970=100

		G A L L O N S			
		1971	1972	1973	1974
INDUSTRIAL PRODUCT FINISHES					
201.	Wood Furniture and Fixtures	98.8	110.0	129.2	98.6
202.	Wood and Composition Flat Stock	127.4	153.1	150.6	194.0
203.	Metal Furniture and Fixtures (Incl. Office Furniture)	94.5	97.9	98.3	90.7
METAL DECORATING					
204.	Containers and Closures	97.3	96.6	100.4	91.4
205.	Other Metal Decorating (Incl. Lithograph Toys)	87.6	94.9	84.7	227.2
206.	Total Metal Decorating	96.1	96.4	98.4	108.8
207.	Sheet, Strip and Coil Coatings (Incl. Siding)	117.5	131.9	158.1	145.6
APPLIANCES					
208.	Major Household	94.9	87.3	94.4	89.3
209.	Small Household	91.7	88.8	88.4	75.5
210.	Heaters and Air Conditioners	81.3	79.6	72.9	45.1
211.	Total Appliances	91.7	85.8	89.4	78.8
TRANSPORTATION - ORIGINAL EQUIPMENT					
212.	Automobiles	119.0	128.3	149.3	108.2
213.	Trucks and Buses	115.7	131.9	135.0	108.1
214.	Railroads	88.6	70.7	91.6	80.1
215.	Aircrafts, Rockets and Missiles	88.0	105.3	53.6	42.1
216.	Other Transportation	225.4	238.5	158.5	180.0
217.	Total Transportation - Original Equipment	114.5	120.4	139.0	103.8
218.	Toys, Sporting Goods, Gym and Baby Equipment	97.3	117.0	106.7	95.8
MACHINERY AND EQUIPMENT					
219.	Electrical and Electronic Machinery and Equipment	95.4	89.6	87.7	107.2
220.	Insulating Varnish (Incl. Magnet Wire Enamels)	90.4	86.7	86.0	71.0
221.	Stationary Machinery and Machine Tools	84.2	84.7	86.8	55.1
222.	Farm Construction, Earthmoving, etc.	100.7	107.6	125.4	101.9
223.	Other Machinery and Equipment	378.5	418.2	563.5	286.2
224.	Total Machinery and Equipment	102.5	104.4	115.4	98.2
MARINE FINISHES					
226.	Pleasure Crafts (Original Only)	100.1	49.4	46.2	45.8
227.	Commercial (Original and Refinish)	107.6	44.8	44.1	37.0
228.	Total Marine Finishes	103.1	47.6	45.4	42.3
FINISHES AND COATINGS FOR SPECIAL SUBSTRATES					
229.	Paper and Paper Board	103.7	84.1	77.8	60.0
230.	Flexible Packaging - Film and Foil	127.7	156.0	177.3	175.2
231.	Other Finishes and Coatings for Special Substrates (Incl. Leather Finishes)	164.9	171.3	206.0	165.4
232.	Total Finishes and Coatings for Special Substrates	113.8	99.6	100.4	79.6
OTHER CHEMICAL COATINGS					
233.	General Metal Finishes (Incl. Structural Steel)	97.5	121.6	192.0	295.7
234.	Government Specification Paints (Other than Traffic)	79.5	92.2	98.7	23.0
235.	Other	113.4	166.7	175.8	219.1
238.	Total Other Chemical Coatings	103.1	142.3	160.8	186.6
239.	TOTAL -- INDUSTRIAL PRODUCT FINISHES	104.7	110.5	122.0	108.9

TABLE IV

(Continued)

MAINTENANCE PAINTS

GROWTH TRENDS -- 1971-1972-1973-1974
Index Base: 1970=100

		G A L L O N S			
		1971	1972	1973	1974
<u>MAINTENANCE PAINTS</u>					
250.	Exterior Maintenance Paints	87.8	84.7	82.3	105.2
251.	Interior Maintenance Paints	106.1	112.1	106.9	342.5
252.	Other Maintenance Paints	109.1	166.3	141.8	146.2
260.	TOTAL MAINTENANCE PAINTS	95.9	106.4	99.1	165.1
301.	GRAND TOTAL -- Lines 165, 239 AND 260.	106.0	115.5	121.6	115.2

BUREAU OF THE CENSUS

TRADE SALES	100.8	105.6	99.2	111.0
CHEMICAL COATINGS	111.1	119.0	118.5	116.3
TOTAL:	105.8	112.1	108.5	112.7

TABLE V

CHANNEL OF DISTRIBUTION

(Based on Reported Sales - 1974)

MAINTENANCE NON-RESIDENTIAL STRUCTURES

	<u>Percentage of Stationary</u>		<u>Percentage of Mobile</u>	
	<u>Gallons</u>	<u>Dollars</u>	<u>Gallons</u>	<u>Dollars</u>
Distributor, Jobber	18.7	11.2	6.7	8.1
Retail Outlets	6.6	7.8	--	--
Industrial, Commercial	38.8	41.3	57.8	55.6
Contractor	29.7	29.5	10.7	9.5
Federal Government	3.6	2.6	--	--
State & Local Government	1.4	6.1	1.9	1.5
Export	.9	1.1	21.8	24.3
Other (Incl. Direct to Consumer)	.3	.4	1.1	1.0
TOTAL:	100.0	100.0	100.0	100.0

TABLE V
CHANNELS OF DISTRIBUTION

BASED ON REPORTED SALES - 1974

	Percentage of Trade Sales		Percentage of Chemical Coatings	
	Gallons	Dollars	Gallons	Dollars
Retail Outlets*	64.7	55.0	18.7	18.5
Distributor, Jobber	16.2	22.2	.3	.5
Industrial, Commercial	4.3	4.3	75.6	75.7
Contractor	6.3	13.7	1.0	.8
Federal Government	.8	.4	.6	.8
State & Local Government	6.9	3.5	.1	.1
Export	.7	.8	.5	.8
Other (Incl. Direct to Consumer)	.1	.1	3.2	2.8
TOTAL:	100.0	100.0	100.0	100.0

DISTRIBUTION TO RETAIL OUTLETS*

	Percentage	
	Gallons	Dollars
Department Stores	43.0	32.6
Discount Stores	2.4	2.7
Hardware Stores	7.7	8.6
Paint Stores	18.9	23.6
Lumber Yards	4.8	5.4
Drug Stores	.2	.2
Variety Stores	.4	.4
Food Stores	.1	.1
Company Owned Stores	22.5	26.4
TOTAL:	100.0	100.0

TABLE VI
PERCENTAGE OF SALES BY REGIONS

	<u>TRADE SALES</u>	<u>CHEMICAL COATINGS</u>
NEW ENGLAND (ME., N.H., VT., MASS., R.I., CONN.)	6.7	3.6
MIDDLE ATLANTIC (N.Y., N.J., PA.) . .	14.7	9.4
EAST NORTH CENTRAL (OHIO, IND., ILL., MICH., WISC.)	21.1	34.9
WEST NORTH CENTRAL (MINN., IOWA, MO., KANS., N.D., S.D., NEB.)	10.0	6.7
SOUTH ATLANTIC (DEL., MD., D.C., FLA., VA., W.VA., N.C., S.C., GA.)	16.9	16.6
EAST SOUTH CENTRAL (KY., TENN., ALA., MISS.)	7.4	8.3
WEST SOUTH CENTRAL (ARK., LA., OKLA., TEXAS)	8.5	6.1
MOUNTAIN (MONT., IDAHO, WYO., COLO., N.M., ARIZ., UTAH, NEVADA)	4.3	.9
PACIFIC (WASH., ORE., CALIF., ALASKA, HAWAII)	10.4	13.5
TOTAL:	100.0	100.0

TABLE VII
COMPARISON OF REPORTED SALES
WITH
BUREAU OF CENSUS INDUSTRY TOTAL-1974
COMPANIES VS. TOTAL INDUSTRY

<u>GALLONS</u>	<u>U.S. Census Total Industry Thousands of Gallons</u>	<u>As Reported -- 87 Companies Thousands of Gallons</u>	<u>Per Cent of Industry</u>
Trade Sales	474,748	229,074	48.3
Chemical Coatings	457,435	192,855	42.2
Maintenance Paints	--	14,122	--
TOTAL:	932,183	436,051	46.8

<u>DOLLARS</u>	<u>U.S. Census Total Industry Thousands of Dollars</u>	<u>As Reported -- 87 Companies Thousands of Dollars</u>	<u>Per Cent of Industry</u>
Trade Sales	\$1,870,939	\$1,113,781	59.5
Chemical Coatings	1,800,762	812,321	45.1
Maintenance Paints	--	78,120	--
TOTAL	\$3,671,701	\$2,004,222	54.6

TABLE VIII
COMPARISON OF REPORTED SALES
WITH
BUREAU OF CENSUS INDUSTRY TOTAL - 1974
TRADE SALES vs. CHEMICAL COATINGS

<u>GALLONS</u>	<u>U.S. Census-Total Industry</u>		<u>As Reported- 87 Companies</u>	
	<u>Thousands of Gallons</u>	<u>Per Cent</u>	<u>Thousands of Gallons</u>	<u>Per Cent</u>
Trade Sales	474,748	50.9	229,074	52.5
Chemical Coatings	457,435	49.1	192,855	44.2
Maintenance Paints	--	--	14,122	3.3
<u>TOTAL:</u>	932,183	100.0	436,051	100.0

<u>DOLLARS</u>	<u>U.S. Census-Total Industry</u>		<u>As Reported- 87 Companies</u>	
	<u>Thousands of Dollars</u>	<u>Per Cent</u>	<u>Thousands of Gallons</u>	<u>Per Cent</u>
Trade Sales	\$1,870,939	51.0	\$1,113,781	55.6
Chemical Coatings	1,800,762	49.0	812,321	40.5
Maintenance Paints	--	--	78,120	3.9
<u>TOTAL:</u>	\$3,671,701	100.0	\$2,004,222	100.0

Appendix A
National Paint and Coatings Association, Inc.

SALES SURVEY
FOR THE YEAR 1974

I N S T R U C T I O N S

This report is designed to meet a specific need for annual data on a product line and end-use basis. Please report on a company basis wherever possible. When not possible, please indicate which plants are missing and how data can be obtained.

REPORTING PERIOD: We are seeking data for the year 1974 -- If you keep records on a fiscal year basis instead of a calendar year basis, please report for your fiscal year ending 1974.

T I M E is an important element if this survey is to be of optimum value.

Reports covering the year 1974 MUST BE RECEIVED BY MARCH 31, 1975.

METHOD OF REPORTING: The method of reporting is flexible because our investigations have shown that it would be difficult for some companies to report "Trade Sales: Gallons Sold or Shipped by Product." Substitution of "Production Data by Product" for "Gallonage Sales or Shipments Data" is acceptable when the latter is not available. Gallonage can also be derived by dividing dollar sales by an average sales price per gallon. In the event that dollar sales by products is not available, all are urged to estimate dollar sales by multiplying production data by an average selling price. IT IS IMPORTANT THAT THE RESPONDANT COMPLETE THE FORM EVEN IF ESTIMATES ARE NECESSARY.

If difficulties are encountered in reclassifying all of your Industrial Finish Shipments or Sales to End-Using-Industry (Automobile, Appliances, Furniture, etc.) consult the End-Use Identification Directory provided.

Whenever records cannot provide actual data, please utilize your best judgment and provide us with estimates.

If you have any questions regarding classification of significant quantities, rather than to enter amounts under "Other", please contact the MANAGEMENT INFORMATION DIVISION of NPCA.

DEFINITION OF QUANTITIES SHIPPED: The Trade Sales Report should include the Gallons shipped or sold to dealers, wholesalers, distributors, company branches, company owned stores, painters or institutions. The Chemical Coatings Report should include the gallons shipped to industrial customers, Federal and State Government. The Special Maintenance Report should include Gallons Shipped to dealers, wholesalers, distributors, company branches, company owned stores, painters, institutions, industrial customers or federal and State Governments.

DO NOT INCLUDE:

- (1) Shipments (production) of Semi-Finishes Goods such as Paint vehicles.

- (2) Shipments (production) of such products as Ink Vehicles, Dispersed Colors, Bleached Shellac, Thinners, etc.
- (3) Shipments to companies within the paint industry where products will be reported again as sales.

DEFINITION OF DOLLARS SOLD: The objective is to measure the final sales value to the manufacturer. Therefore, dollars received for quantities sold by a large multi-branch company to regional distribution points should not be reported, unless such dollars reflect the ultimate price the company will get when the branch sells the final customer. You should report dollars received or accounts receivable dollars for paint products excluding non-paint items as thinners.

DEFINITION OF TRADE SALES PRODUCTS: "Trade Sales" means all sales (of stock type items) to jobbers, dealers, painters, contractors, builders, automotive refinish jobbers, through company owned stores and sales made directly to the consumers for maintenance of residences, institutions, office buildings and factory walls, floors, ceilings, etc.

DEFINITION OF CHEMICAL COATINGS PRODUCTS: "Industrial Product Finishes"--
"An Industrial Product Finish is any organic product of the paint and coatings industry SPECIFICALLY FORMULATED to meet the conditions of application and use of the article to which applied and applied to such article as part of the manufacturing process."

DEFINITION OF MAINTENANCE PAINTS: Maintenance paints are liquid coatings applied in the field to non-residential buildings, equipment and structure, both stationary and mobile.

Distribute your sales according to Exterior and Interior uses. Where end-use is unknown or where coating cannot be classified as Exterior or Interior, report them as "Other Maintenance Paints".

CHANNELS OF DISTRIBUTION: Please give us your best estimate as to the sales of Trade Chemical Coatings and Maintenance Sales to each of the channels of distribution you utilize.

PERCENTAGE OF SALES BY REGIONS: (Separate Form) Enter your total dollar sales of Trade Sales and Chemical Coatings. Then, you give your best estimates of the distribution of your sales to the geographic regions described.

* * *

Mail Completed Report To: NPCA SURVEYS - TYSON, BELZER & ASSOCIATES
7735 OLD GEORGETOWN ROAD
BETHESDA, MARYLAND 20014

BEFORE: MARCH 31, 1975

National Paint and Coatings Association

SALES SURVEY

FOR THE YEAR 1974

DIRECTORY OF END-USE IDENTIFICATION FOR
CHEMICAL COATINGS PRODUCTS:

In order to assure comparable reporting of INDUSTRIAL PRODUCT FINISHES sales on our SALES SURVEY, your Management Information Committee has developed a DIRECTORY of END-USE IDENTIFICATION.

The DIRECTORY is designed to assist you to report your sales of PRODUCT FINISHES on the proper line. Each line designation of the SALES SURVEY form is underscored in the DIRECTORY and the line number is shown in parenthesis on the left. Listed under each of these major categories are the end uses which should be included. Even if you sell to some end uses which are not specifically shown, the detail listing should help to describe the types of end uses in each category.

For example, suppose you make finishes for Wood TV Cabinets. On which line should they be entered? Reference to the End Use Identification lists shows that they should be included in line 201 "Wood Furniture and Fixtures" and not on line 209 "Small Appliances" nor on line 219 "Electrical and Electronic Machinery and Equipment".

For those companies which use the Government Standard Industrial Classification (SIC) numbers in their internal accounting, the SIC numbers are also shown.

Please direct any questions you may have relating to this DIRECTORY to the Management Information Division, National Paint and Coatings Association, 1500 Rhode Island Avenue, N.W., Washington, D.C. 20005.

(Over)

DIRECTORY
END USE IDENTIFICATION OF PRODUCT FINISHES
by
FEDERAL STANDARD INDUSTRIAL CLASSIFICATION CODE NUMBER
As Reported in NPCA Sales Survey

NPCA SALES SURVEY
Line Number

(201)

WOOD FURNITURE & FIXTURES

2431 Millwork plants
2499 Wood products, n.e.c.
2511 Wood household furniture
25111 Radio, Phone and TV Wood Cabinets
25155 Jackknife sofa beds and chair beds
25156 Studio couches
2519 Household furniture, n.e.c.
2521 Wood office furniture
2531 Public building and related furniture (wood)
2599 Furniture and Fixtures, n.e.c. (wood)
3931 Musical instruments and parts
3988 Wood caskets and coffins
3995 Umbrellas, parasols and canes

(202)

WOOD AND COMPOSITION FLAT STOCK

2431 Veneer and plywood plants
2433 Prefab, wooden building and structural members
2541 Wood partitions, shelving, lockers and office and store fixtures
2591 Venitian blinds and shades (wood)

(203)

METAL FURNITURE & FIXTURES (incl. office furniture)

2514 Metal household furniture
251498 Other metal household furniture, including metal radio, phono,
TV, hifi cabinets, etc.
2515 Mattresses and bed springs
2522 Metal office furniture
2531 Public buildings and related furniture (metal)
2542 Metal partitions, shelvings, lockers and office and store fixtures
2591 Venitian blinds and shades (metal, except strip)
2599 Furniture and fixtures (n.e.c., metal)
3442 Metal doors, sash, frames, molding and trim
3492 Safes and vaults
3499 Fabricated metal products, n.e.c.
3642 Lighting fixtures
3651 Radio and TV receiving sets
39881 Metal caskets and coffins
39992 Coin operated amusement machines

METAL DECORATING

(204)

CONTAINERS AND CLOSURES

3411 Metal cans
3461 Metal Commercial closures, except crowns
34617 Crowns
3491 Metal Barrels, Drums, kegs and pails
3496 Collapsible tubes

(205)

ALL OTHERS (incl. lithograph toys)

34212 Razor blades and razors, except electric
34618 Other stamped and pressed metal end products
3497 Metal foil and leaf

(206)

TOTAL OF LINES 204 and 205

(207)

SHEET, STRIP AND COIL COATINGS (incl. siding)

2591 Metal Venitian blinds and shades. Other strip and coil coatings

APPLIANCES

(208)

MAJOR HOUSEHOLD

3631 Major household cooking equipment
3632 Household refrigerators, home and farm freezers
3633 Household laundry equipment

(209)

SMALL HOUSEHOLD

3584 Vacuum cleaners, industrial
3634 Electric housewares and fans
3635 Household vacuum cleaners
3636 Sewing machines
36393 Other household appliances and parts

(210)

HEATERS AND AIR CONDITIONERS

3433 Heating equipment, except electric
3567 Industrial process furnaces and ovens
3585 Refrigerators and refrigeration machinery, except household;
and complete air conditioning units
36391 Household water heaters, electric
36392 Household water heaters, except electric

(211)

TOTAL OF LINES 208, 209 and 210

(212)

AUTOMOBILE

3712 Passenger car bodies
37171 Passenger cars, knocked down or assembled and chassis for
sales separately

- (213) TRUCKS AND BUSES
- 3713 Truck and bus bodies
 - 3715 Truck trailers
 - 37172 Truck tractors, truck chassis and trucks
 - 37173 Motor coaches (except trolley buses) and fire department vehicles
 - 37174 Combat vehicles
- (214) RAILROADS
- 3741 Locomotive and parts
 - 3742 Railroad and streetcars
- (215) AIRCRAFT ROCKETS & MISSILES
- 1925 Guided missiles, complete
 - 3721 Aircraft
 - 3722 Aircraft engines and engine parts
 - 3723 Aircraft propellers and propeller parts
 - 3729 Aircraft parts and auxiliary equipment, n.e.c.
- (216) OTHER
- 3791 Trailer coaches (housing type)
 - 3799 Transportation equipment, n.e.c.
- (217) TOTAL OF LINES 212, 213, 214, 215 and 216
- (218) TOYS, SPORTING GOODS, GYM and BABY EQUIPMENT
- MACHINERY AND EQUIPMENT
- (219) ELECTRICAL & ELECTRONIC MACHINERY & EQUIPMENT
- 3611 Electrical measuring instruments and test equipment
 - 3612 Power distribution and specialty transformers
 - 3613 Switchgear and switchboard apparatus
 - 3621 Motors and generators
 - 3622 Industrial controls
 - 3623 Welding apparatus
 - 3629 Electrical industrial apparatus, n.e.c.
 - 3641 Electrical lamps
 - 3643 Current carrying wiring devices
 - 3661 Telephone and telegraph apparatus
 - 3662 Radio and television; transmitting, signaling and detection equipment and apparatus
 - 3671 Radio and TV receiving type electron tubes, except cathode ray
 - 3672 Cathode ray picture tubes
 - 3673 Transmitting, industrial, and special purpose electron tubes
 - 3679 Electronic components and accessories, n.e.c.
 - 3691 Storage batteries
 - 3692 Primary batteries (dry and wet)
 - 3693 Radiographic x-ray, fluoroscopic x-ray, therapeutic x-ray, and other x-ray apparatus and tubes

MACHINERY & EQUIPMENT (cont.)

(219)

ELECTRICAL & ELECTRONIC MACHINERY & EQUIPMENT (cont.)

3694 Electrical equipment for internal combustion engine
3699 Electrical machinery, equipment, and supplies, n.e.c.

(220)

INSULATING VARNISH (Incl. magnet wire enamels)

3357 Wire cable
3481 Miscellaneous fabricated wire products

(221)

STATIONARY MACHINERY & MACHINE TOOLS

3511 Steam engines, gas and hydraulic turbines, steam gas &
hydraulic turbine generator set units
3519 Internal combustion engines, n.e.c.
3532 Mining machinery and equipment
3533 Oil field machinery and equipment
3534 Elevators and moving stairways
3535 Conveyors and conveying equipment
3536 Hoists, industrial cranes and monorail systems
3541 Machine tools, metal cutting types
3542 Machine tools, metal forming types
3544 Special dies and tools, die sets, jigs and fixtures
3545 Machine tool accessories and measuring devices
3548 Metal working machinery, except machine tools
3551 Food products machinery
3552 Textile machinery
3553 Woodworking machinery
3554 Paper industries machinery
3555 Printing trades machinery and equipment
3559 Special industry machinery, n.e.c.
3561 Pumps, air and gas compressors, and pumping equipment
3564 Blowers, exhaust and ventilating fans
3566 Mechanical power transmission equipment, except ball and
roller bearings
3569 General industrial machinery and equipment, n.e.c.
3586 Measuring and dispensing pumps
3599 Machinery and parts (except electrical) n.e.c.

(222)

FARM, CONSTRUCTION, EARTHMOVING, etc.

3522 Farm machinery and equipment
3531 Construction machinery and equipment
3537 Industrial trucks, tractors, trailers, and stackers (material
handling equipment)

(224)

TOTAL OF LINES 219, 220, 221, 222 and 223

MARINE FINISHES

(226) **PLEASURE CRAFT** (original only)

3732 Boat Building

(227) **COMMERCIAL** (original & refinish)

3731 Ship building and repairing

(228) TOTAL OF LINES 226 and 227

FINISHES & COATINGS FOR SPECIAL SUBSTRATED

(229) **PAPER & PAPERBOARD**

26 Paper and allied products

27 Printing, publishing and allied products

(230) **FLEXIBLE PACKAGING - FILM & FOIL**

(232) TOTAL OF LINES 229, 230 and 231

(238) Includes GENERAL METAL FINISHES and GOVERNMENT SPECIFICATIONS
PAINTS (Other than Traffic--Includes Military, Federal, State and Local)

* * *

Mail completed copy before
March 31, 1975 to:

NPCA Surveys
Tyson, Belzer Associates
7735 Old Georgetown Road
Bethesda, Maryland 20014

Appendix B

NATIONAL PAINT AND COATINGS ASSOCIATION, INC.

SALES SURVEY

FOR THE YEAR 1974

PART I - TRADE SALES PRODUCTS

TOTAL SALES ^(a)

(Round to nearest whole gallon and dollar)

	Gallons			Dollars		
101.						
102.						
103.						
104.						
109.						
110.						
111.						
112.						
113.						
114.						

EXTERIOR PAINTS

Exterior House Paints

Oil and Alkyd House Paints and Tinting Bases

WATER EMULSION PAINTS AND TINTING BASES

All Purpose Water Emulsion Paints (For Ext.-Int. Types See Line 132)

Masonry Water Emulsion Paints

Total Water Emulsion Paints

ENAMELS AND TINTING BASES (Enter Int.-Ext. Quick Drying Enamels on Line 128)

Sash, Trim and Trellis Enamels

Porch and Deck Enamels (Incl. Int.-Ext. Floor Enamels here)

Total Enamels

Under Coaters, Primers and Sealers

Other Exterior House Paints (Include Other Water Thinned Paints & Paste In Oil) (Please identify)

TOTAL EXTERIOR HOUSE PAINTS (Add Lines 101, 104, 111, 112, 113)

Miscellaneous Exterior Paints

115.						
117.						
118.						
119.						
120.						
121.						
122.						
123.						
124.						
125.						

Barn and Fence Paints

Roof Coatings

METALLIC PIGMENTED PAINTS

Aluminum

Zinc and Other Metallic Pigmented Paints

Total Metallic Pigmented Paints

Stains (Including Shingle and Shakes)

Varnishes, Natural and Synthetic

Other Exterior Paints (Including Multicolored Paint & Bituminous Paints) (b) (Please identify)

Total Miscellaneous Exterior Paints (Add Lines 115, 117, 120, 121, 122, 123)

TOTAL - ALL EXTERIOR PAINTS (Add Lines 114 and 124)

(a) See instructions for substituting shipments or production.

(b) See lines 157 through 162 for Automotive Refinish, Machinery Enamels, Traffic and Marine Paints other than for original equipment.

PART I — TRADE SALES PRODUCTS (continued)

TOTAL SALES^(a)
(Round to nearest whole gallon and dollar)

	Gallons			Dollars		
126.						
127.						
128.						
130.						
131.						
132.						
133.						
134.						
135.						
138.						
139.						
140.						
141.						

INTERIOR PAINTS

Interior House Paints

Oil and Alkyd Wall Paints and Tinting Bases — Flat
 Oil and Alkyd Paints and Tinting Bases — Semi-Gloss
 Oil and Alkyd Gloss and Quick Drying Enamels and Tinting Bases
 (Enter Ext.-Int. Quick Drying Enamels here)
 READY MIXED WATER EMULSION PAINTS AND TINTING BASES
 Water Emulsion Paints and Tinting Bases — Flat
 Water Emulsion Paints and Tinting Bases — Semi-Gloss
 Water Emulsion Paints and Tinting Bases — Gloss
 All Purpose Water Emulsion Paints
 (Enter Int.-Ext. Types here)
Total Ready-Mixed Water Emulsion Paints
 Undercoaters, Primers and Sealers
 OTHER INTERIOR HOUSE PAINTS (Please identify end use and state amounts
 on lines 138, 139 and 140)

TOTAL INTERIOR HOUSE PAINTS (Add Lines 126, 127,
128, 134, 135, 138, 139, 140)

Miscellaneous Interior Paints

142.						
143.						
145.						
146.						
147.						
148.						
149.						
151.						
152.						
153.						
154.						
155.						
156.						

VARNISHES — SYNTHETIC AND NATURAL

Satin

Gloss

Stains

Ceramic, Glaze, Tile-Like Coatings

Seamless Systems

Multicolored Paints

Colorants (Including colors in oils)

Fire Retardant Paints

Other Interior Paints (b) (Please identify)

Total Miscellaneous Interior Paints (Add Lines 142 through 153)

TOTAL ALL INTERIOR PAINTS (Add Lines 141 and 154)

TOTAL EXTERIOR AND INTERIOR TRADE SALES PAINTS
(Add Lines 125 and 155)

Other Trade Sales Finishes

157.						
158.						
159.						
160.						
161.						
162.						
163.						
164.						
165.						

Automotive and Machinery Refinish Paints, Lacquers, Enamels
(Int. & Ext.)

Automotive and Machinery Refinish Primers and Undercoaters
(Int. & Ext.)

Traffic Paints (all types, whether shelf goods or for
highway departments)

Exterior Marine Paints and Enamels (Shelf Goods Only) (c)

Interior Marine Paints and Enamels (Shelf Goods Only) (c)

Government Specification Paints (Other than Traffic — Include
Military, Federal, State and Local)

Not Elsewhere Classified

Total Other Trade Sales Finishes (Add Lines 157 through 163)

GRANT TOTAL — TRADE SALES PRODUCTS
(Add Lines 156 and 164)

(a) See instructions for substituting shipments or production.

(b) See lines 157 through 162 for Automotive Refinish, Machinery Enamels, Traffic and Marine Paints other than for original equipment, and Government Specification Paints.

(c) Also see lines 226, 227 and 228 under Chemical Coatings.

PART II — CHEMICAL COATINGS PRODUCTS

TOTAL SALES ^(a)
(Round to nearest whole gallon and dollar)

	Gallons			Dollars		
201.						
202.						
203.						
204.						
205.						
206.						
207.						
208.						
209.						
210.						
211.						
212.						
213.						
214.						
215.						
216.						
217.						
218.						
219.						
220.						
221.						
222.						
223.						
224.						
225.	XX	XX	XX	XX	XX	XX
226.						
227.						
228.						
229.						
230.						
231.						
232.						
233.						
234.						
235.						
236.						
237.						
238.						
239						

INDUSTRIAL PRODUCT FINISHES

Wood Furniture and Fixtures
Wood and Composition Flat Stock
Metal Furniture and Fixtures (Including office furniture)
METAL DECORATING
 Containers and Closures
 Other Metal Decorating (Including lithograph toys)
 Total Metal Decorating

Sheet, Strip and Coil Coatings (Including Siding)
APPLIANCES
 Major Household
 Small Household
 Heaters and Air Conditioners
 Total Appliances

TRANSPORTATION — ORIGINAL EQUIPMENT
 Automobile
 Trucks and Buses
 Railroads
 Aircraft, Rockets and Missiles
 Other Transportation
 Total Transportation — Original Equipment

Toys, Sporting Goods, Gym and Baby Equipment
MACHINERY AND EQUIPMENT
 Electrical and Electronic Machinery and Equipment
 Insulating Varnish (Including magnet wire enamels)
 Stationary Machinery and Machine Tools
 Farm, Construction, Earthmoving, etc.
 Other Machinery and Equipment
 Total Machinery and Equipment

Traffic and Road Marking (Enter on line 159)

MARINE FINISHES
 Pleasure Craft (original only)
 Commercial (original and refinish)
 Total Marine Finishes^(b)

FINISHES AND COATINGS FOR SPECIAL SUBSTRATES
 Paper and Paper Board
 Flexible Packaging — Film and Foil
 Other Finishes and Coatings for Special Substrates (incl. leather finishes)
 Total Finishes and Coatings for Special Substrates

OTHER CHEMICAL COATINGS (Please identify end use and state amounts)

 General Metal Finishes (Incl. Structural Steel)
 Government Specification Paints (Other than Traffic, Include Military, Federal, State and Local)

Total Other Chemical Coatings (add lines 233 through 237)

TOTAL INDUSTRIAL PRODUCT FINISHES (add lines 201, 202, 203, 206, 207, 211, 217, 218, 224, 228, 232, 238)

(a) See instructions for substitution shipments or production.
(b) See lines 160 and 161

PART III - MAINTENANCE PAINTS

TOTAL SALES ^(a)

(Round to nearest whole gallon and dollar)

250.
251.
252.

260.

301.

Gallons			Dollars		

Maintenance Paints

Exterior Maintenance Paints
Interior Maintenance Paints
Other Maintenance Paints

Total Maintenance Paints

GRAND TOTAL (Add lines 165, 239 and 260)

(a) See instructions for substituting Shipments or Production.

CHANNELS OF DISTRIBUTION

(Exclusive of Powder Coatings)

(Round to nearest whole gallon and dollar)

TRADE SALES

CHEMICAL COATINGS

Gallons			Dollars			Gallons			Dollars		
401.			411.			Retail Outlets (Equals items 510 & 520)	421.		431.		
402.			412.			Distributor, Jobber	422.		432.		
403.			413.			Industrial, Commercial	423.		433.		
404.			414.			Contractor	424.		434.		
405.			415.			Federal Government	425.		435.		
406.			416.			State & Local Government	426.		436.		
407.			417.			Export	427.		437.		
408.			418.			Other (Incl. Direct to Consumer)	428.		438.		
409.			419.			TOTAL	429.		439.		

RETAIL OUTLETS

(Round to nearest whole gallon and dollar)

TRADE SALES

CHEMICAL COATINGS

Gallons			Dollars			Gallons			Dollars		
501.			511.			Department Stores	521.		531.		
502.			512.			Discount Stores	522.		532.		
503.			513.			Hardware Stores	523.		533.		
504.			514.			Paint Stores	524.		534.		
505.			515.			Lumber Yards	525.		535.		
506.			516.			Drug Stores	526.		536.		
507.			517.			Variety Stores	527.		537.		
508.			518.			Food Stores	528.		538.		
509.			519.			Company owned Stores	529.		539.		
510.			520.			TOTAL (Equals items 401 & 411)	530.		540.		

MAINTENANCE

(Round to nearest whole gallon and dollar)

Non-Residential Structures

STATIONARY

MOBILE

Gallons			Dollars			Gallons			Dollars		
601.			610.			Distributor, Jobber	620.		630.		
602.			611.			Retail Outlets	621.		631.		
603.			612.			Industrial, Commercial	622.		632.		
604.			613.			Contractor	623.		633.		
605.			614.			Federal Government	624.		634.		
606.			615.			State & Local Government	625.		635.		
607.			616.			Export	626.		636.		
608.			617.			Other (Incl. Direct to Consumer)	627.		637.		
609.			618.			TOTAL	628.		638.		

FIRM NAME _____

NAME OF INDIVIDUAL _____

ADDRESS _____

MIC/1-75

Mail completed copy before
March 31, 1975, to:

NPCA SURVEYS,
Tyson, Belzer Associates,
7735 Old Georgetown Road,
Bethesda, Maryland 20014

National Paint and Coatings Association, Inc.

SALES SURVEY SHORT FORM
For the Year 1974

		<u>GALLONS</u>	<u>DOLLARS</u>
	TRADE SALES		
114.	<u>EXTERIOR HOUSE PAINTS</u>		
	Solvent Thinned	_____	_____
	Water Thinned	_____	_____
	TOTAL	_____	_____
141.	<u>INTERIOR HOUSE PAINTS</u>		
	Solvent Thinned	_____	_____
	Water Thinned	_____	_____
	TOTAL	_____	_____
163.	OTHER TRADE SALES FINISHES	_____	_____
165.	TOTAL TRADE SALES	=====	=====
	CHEMICAL COATINGS		
201.	Wood Furniture & Fixtures	_____	_____
202.	Wood & Composition Flat Stock	_____	_____
203.	Metal Furniture & Fixtures	_____	_____
206.	Metal Decorating	_____	_____
207.	Sheet, Strip & Coil Coatings	_____	_____
211.	Appliances	_____	_____
217.	Transportation	_____	_____
218.	Toys, Sporting Goods, Gym & Baby Equipment	_____	_____
224.	Machinery & Equipment	_____	_____
228.	Marine Finishes	_____	_____
232.	Special Substrates Finishes	_____	_____
238.	Other	_____	_____
239.	TOTAL CHEMICAL COATINGS	_____	_____
260.	MAINTENANCE PAINTS	_____	_____
301.	GRAND TOTAL	_____	_____

FIRM NAME _____

NAME OF INDIVIDUAL _____

ADDRESS _____

Return prior to:
March 31, 1975 to:

NPCA SURVEYS
Tyson, Belzer & Associates
7735 Old Georgetown Road
Bethesda, Maryland 20014

National Paint & Coatings Association

SALES SURVEY For the Year 1974

The Management Information Committee's objective is to provide the membership all information necessary for profitable decision making in attempting to develop regional data relating to our industry. One approach is to have all reporting on a plant basis. A second approach is this form that calls for an approximation of your sales by area.

Your cooperation will permit us to better serve you.

	<u>Trade Sales</u>	<u>Chemical Coatings</u>
TOTAL DOLLAR SALES	(100) \$ _____	(200) \$ _____

PERCENTAGE OF SALES BY REGIONS

	<u>Trade Sales</u>	<u>Chemical Coatings</u>
New England (Me., N.H., Vt., Mass., R.I., Conn.)	(101) _____ %	(201) _____ %
Middle Atlantic (N.Y., N.J., Pa.)	(102) _____ %	(202) _____ %
East North Central (Ohio, Ind., Ill., Mich., Wisc.)	(103) _____ %	(203) _____ %
West North Central (Minn., Iowa, Mo., Kan., N.D., S.D., Neb.)	(104) _____ %	(204) _____ %
South Atlantic (Del., Md., D.C., Va., W.Va., N.C., S.C., Ga., Fla.)	(105) _____ %	(205) _____ %
East South Central (Ky., Tenn., Ala., Miss.)	(106) _____ %	(206) _____ %
West South Central (Ark., La., Okla., Tex.)	(107) _____ %	(207) _____ %
Mountain (Mont., Idaho, Wyo., Colo., N.M., Ariz., Utah, Nev.)	(108) _____ %	(208) _____ %
Pacific (Wash., Or., Cal., Alaska, Ha.)	(109) _____ %	(209) _____ %
TOTAL:	100 %	100 %

Mail to: NPCA SURVEYS
Tyson, Belzer, & Associates
7735 Old Georgetown Road
Bethesda, Md. 20014

BEFORE: MARCH 31, 1975

Company _____

Address _____

Jan. '75