

Pipe Coating Materials Market By Coating Material (Polyethylene (PE) Coatings, Polypropylene (PP) Coatings, Fusion-Bonded Epoxy (FBE) Coatings, Polyurethane (PU) Coatings, Others), By End-Use (Oil and Gas Pipelines, Water and Waste Water, Chemical Processing, Others): Global Opportunity Analysis and Industry Forecast, 2024-2033

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Abstracts

The global pipe coating materials market was valued at \$10.1 billion in 2023, and is projected to reach \$15.3 billion by 2033, growing at a CAGR of 4.3% from 2024 to 2033.

Introduction

Pipe coating materials are specialized compounds applied to the surface of pipes to protect them from corrosion, abrasion, and other forms of damage, thereby extending their service life and maintaining their integrity. These coatings serve as a barrier between the pipe material and the surrounding environment, shielding it from harsh conditions such as moisture, chemicals, and mechanical stresses.

One common type of pipe coating material is fusion-bonded epoxy (FBE). FBE coatings are thermoset materials that are applied to the pipe surface using a process that involves heating the coating powder to its melting point and then fusing it to the substrate. This results in a durable, corrosion-resistant coating that adheres tightly to the pipe surface. FBE coatings are widely used in the oil and gas industry for both

onshore and offshore pipelines, as well as in the water and wastewater industry for transmission and distribution pipes.

The pipe coating materials are also used in a variety of other applications and industries. For example, they are used to protect the interior surfaces of tanks and vessels in the chemical processing and water treatment industries, where corrosion resistance is critical for maintaining product quality and safety. Pipe coating materials are also used in the automotive industry to protect metal components from corrosion and wear, extending the service life of vehicles and reducing maintenance costs.

Market Dynamics

Long-term performance and durability of pipes is expected to drive the growth of the pipe coating materials market. The primary reason for coating pipes is to protect them from corrosion, which can significantly degrade the structural integrity of the pipes over time. Coating materials act as a barrier between the pipe surface and corrosive elements, such as moisture, chemicals, and soil, thereby extending the service life of the pipes. Pipes coated with high-performance materials are expected to have a longer service life compared to uncoated or poorly coated pipes. This extended service life reduces the frequency of maintenance and replacement, resulting in cost savings for pipeline operators and asset owners over the long term. In September 2023, DENSO Group Germany has been at the forefront of establishing quality benchmarks across numerous pipeline projects globally. Operating under the brand FORTIDE, DENSO Group Germany has broadened its portfolio to encompass high-performance epoxy coatings. These coatings are specifically designed for pipeline rehabilitation, offering solutions for entire pipe coatings as well as for welded joints and intricate geometries.

However, the high content of volatile organic compounds (VOCs) in pipe coating is expected to restrain the growth of pipe coating materials market. VOCs are substances that easily evaporate into the air, and they can have various adverse effects on human health and the environment. In many regions, there are regulations in place to limit VOC emissions, which can impact industries that use materials containing VOCs, such as certain types of coatings. The presence of VOCs in pipe coating materials can have several adverse effects on human health and the environment. Inhalation of VOCs can cause respiratory problems, headaches, nausea, and irritation of the eyes, nose, and throat. Long-term exposure to high levels of VOCs may lead to more serious health issues, including damage to the liver,

kidneys, and central nervous system. Additionally, VOCs contribute to the formation of ground-level ozone and smog, which can exacerbate respiratory conditions such as asthma and bronchitis and have detrimental effects on ecosystems.

Segmental Overview

The global pipe coating materials market is segmented into coating material, end use, and region. On the basis of coating material, the market is classified into polyethylene (PE) coatings, polypropylene (PP) coatings, fusion-bonded epoxy (FBE) coatings, polyurethane (PU) coatings, and others. On the basis of end use, the market is divided into oil and gas pipelines, water and wastewater, chemical processing, and others. Region-wise, the market is studied across North America, Europe, Asia-Pacific, and LAMEA.

On the basis of coating material polyurethane (PU) coatings segment is the fastest growing segment representing the CAGR of 5.2% during the forecast period. Polyurethane coatings are used to protect pipelines in water treatment plants, sewage systems, and municipal water distribution networks. These coatings help prevent corrosion and extend the service life of the pipelines, ensuring the safe and efficient transport of water and wastewater. In August 2023, Covestro has launched production of polyurethane elastomer systems at its new Shanghai facility, marking a significant investment in the double-digit million Euro range. This move is part of Covestro's ongoing investment strategy in elastomer raw materials, which has seen recent expansions in Thailand and Spain.

On the basis of end use chemical processing is the fastest-growing segment representing the CAGR of 4.9% in pipe coating material market from 2024 to 2033. Chemical processing often involves corrosive substances that can degrade metal pipelines over time. Pipe coating acts as a protective barrier, preventing corrosion and extending the lifespan of the pipes. This is critical in industries such as petrochemicals, refineries, and chemical manufacturing plants.

Region-wise Asia-Pacific is the fastest-growing segment in the pipe coating material market during the forecast period. In many countries across the Asia-Pacific region, there is significant investment in water and wastewater infrastructure. Pipe coating helps protect these pipelines from corrosion and extends their lifespan. Coated pipes are also used in construction for various applications such as HVAC systems, fire protection, and structural support. China has a substantial demand for pipe coatings, particularly for applications in oil and gas pipelines, water supply systems, and

infrastructure projects.

Competitive Analysis

The report covers profiles of key industry participants such as 3M, AkzoNobel, BASF SE, Arkema, PPG Industries, Inc., Axalta Coating Systems, LLC, Tenaris, The Sherwin-Williams Company, DENSO-Holding GmbH & Co. KG, and LyondellBasell Industries Holdings B.V.

Recent Key Developments in the Pipe Coating Materials Industry

In August 2023, Wheatland Tubenew introduced Ultra Z-Coat, a black steel pipe coating designed to offer superior protection against corrosion and damage during transit and installation. Unlike traditional water-based coatings, Ultra Z-Coat dries rapidly, within moments in the UV light chamber, ensuring that the pipes are immediately ready for handling, touching, and transportation.

Key Market Trends:

By coating material, the fusion-bonded epoxy (FBE) coatings segment dominated the pipe coating materials market and accounted for more than one third of the market share.

By end use oil and gas pipelines is the most lucrative segment in the pipe coating materials market representing 4.0% of CAGR in the market.

By region, Asia-Pacific is the fastest growing region representing 4.7% CAGR in the market during the forecast period.

Key Benefits For Stakeholders

This report provides a quantitative analysis of the market segments, current trends, estimations, and dynamics of the pipe coating materials market analysis from 2023 to 2033 to identify the prevailing pipe coating materials market

opportunities.

The market research is offered along with information related to key drivers, restraints, and opportunities.

Porter's five forces analysis highlights the potency of buyers and suppliers to enable stakeholders make profit-oriented business decisions and strengthen their supplier-buyer network.

In-depth analysis of the pipe coating materials market segmentation assists to determine the prevailing market opportunities.

Major countries in each region are mapped according to their revenue contribution to the global market.

Market player positioning facilitates benchmarking and provides a clear understanding of the present position of the market players.

The report includes the analysis of the regional as well as global pipe coating materials market trends, key players, market segments, application areas, and market growth strategies.

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End user preferences and pain points

Investment Opportunities

Upcoming/New Entrant by Regions

Technology Trend Analysis

Consumer Preference and Product Specifications

Market share analysis of players by products/segments

Regulatory Guidelines

Additional company profiles with specific client's interest

Additional country or region analysis- market size and forecast

Expanded list for Company Profiles

Historic market data

Import Export Analysis/Data

Key player details (including location, contact details, supplier/vendor network etc. in excel format)

SWOT Analysis

Volume Market Size and Forecast

Key Market Segments

By Coating Material

Polyethylene (PE) Coatings

Polypropylene (PP) Coatings

Fusion-Bonded Epoxy (FBE) Coatings

Polyurethane (PU) Coatings

Others

By End-Use

Oil and Gas Pipelines

Water and Waste Water

Chemical Processing

Others

By Region

North America

U.S.

Canada

Mexico

Europe

Germany

France

UK

Spain

Italy

Rest of Europe

Asia-Pacific

China

India

Japan

South Korea

Australia

Rest of Asia-Pacific

LAMEA

Brazil

South Africa

Saudi Arabia

Rest of LAMEA

Key Market Players

3M

AkzoNobel

BASF SE

Arkema

PPG Industries, Inc.

Axalta Coating Systems, LLC

Tenaris S.A.

The Sherwin-Williams Company

DENSO-Holding GmbH & Co. KG

LyondellBasell Industries Holdings B.V.

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