

Coating Additives Market - Global Outlook and Forecast 2021-2026

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Coating Additives Market Report

The coating additives market size is expected to grow at a CAGR of over 5% during the period 2021-2026

The water-borne formulation is likely to witness accelerating growth momentum due to the popularity of low volatile organic component (VOC) content and the growing demand for eco-friendly coating products. The demand for coating additives will grow significantly, particularly in the housing sector. Apart from residential places, the rising non-residential industry will drive the market in the construction sector. Owing to the rapid urbanization, rising disposable income, improved living standard, 100% FDI, and the substantial investment by government agencies to accommodate the growing population, is boosting the construction sector in emerging economies such as India, China, Japan, Brazil, and Thailand.

Automotive production to cross 100 million units by 2025. Post pandemic, global automotive production is estimated to recover and grow. Coating additives enhance functionalities. The automotive industry accounts for 15% of the market share. Emerging start-ups and growing industries in APAC to generate significant opportunities for coating additives vendors. Automotive, construction, furniture, aerospace, healthcare, and marine are the key industries in APAC. Rapid urbanization, increasing disposable incomes, and changing lifestyles have stimulated the growth of key industries in emerging economies such as China, India, Japan, South Korea, and Malaysia, generating excellent opportunities for the vendors.

The following factors are likely to contribute to the growth of the coating additives market during the forecast period:

Booming construction industry

Evolving automotive sector

Increasing demand for eco-friendly coating additives

Growing demand for smart coating and multifunctional additives

The report considers the present scenario of the coating additives market and its market dynamics for the period 2021-2026. It covers a detailed overview of several market growth enablers, restraints, and trends. The study covers both the demand and supply sides of the market. It also profiles and analyses leading companies and several other prominent companies operating in the market.

GLOBAL COATING ADDITIVES MARKET SEGMENTATION

Water-borne coatings are adopted extensively due to low or no VOC emissions. The production of water-borne material is relatively low as they do not require additives, hardness, or thinners. The construction/architecture sector is the highest consumption of water-borne paints. They are ideal primers due to their resistance to heat and abrasion. Solvent-borne coatings are considered less environment-friendly due to high VOC emissions. They were widely used in Europe and North America region but likely to lose their share due to government regulations.

Rheology modification, defoamer, biocides impact modification, wetting & dispersion are the major functions of additives. These functions play an essential role in the coating industry and impart improved solutions. The rheology modifier additives occupy approx. 30% of the global coating additives market share. Rheology modifiers are used in different industries such as automotive, adhesives and sealants, general industry, and coil coating to control sagging, anti-settling, high shear viscosity, and low VOCs emission.

Acrylic is the most widely used polymers in the coating industry. It is used across various applications such as architectural, special-purpose coating, and product finishes for original equipment manufacturers (OEMs). Fluoropolymer additives hold 23% of the

market share. It is expected to grow at a CAGR of over 6 % from 2020-2026. The fluoropolymer additives are expected to witness rapid growth during the forecast period because they provide excellent protection against chemicals, abrasion, temperature, electrical resistance, and corrosion properties. These factors make them ideal for automotive, electronics, architecture, food, heavy equipment, pharmaceutical, cookware, oil & gas production, and aerospace.

The construction segment accounts for 32% of the global coating additives market share. The use of coating additives has increased due to increased construction projects in APAC, Europe, and North America regions. The major drivers for the increase in demand for coating additives are the increasing construction activities, renovation & restoration activities, rapid urbanization, and rise in disposable incomes.

The automotive sector in the paint and coating additives market is likely to reach over USD 1.5 billion by 2026. The ability to protect vehicles from UV oxidation, scratch, stain, rust, and weather conditions fosters the demand for coating additives in the automotive sector. The upcoming trend of increasing electric vehicles in the automotive segment is likely to drive the demand for coating additives. APAC is the dominating market for coating additives in furniture, followed by North America. China is the leading manufacturer of furniture across the world. Canada is the fastest-growing country in North America for additives in wood and furniture, and it is the fourth-largest manufacturer of wooden furniture. Owing to increasing construction activities, the demand for smart homes is the prime reason for the growing demand for additives in wooden furniture.

Segmentation by Formulation Type

Solvent-borne

Water-borne

Powder-borne

Segmentation by Function

Rheology Modification

Defoamer

Biocides Impact Modification

Wetting & Dispersion

Others

Segmentation by Type

Acrylic

Fluoropolymers

Epoxy

Urethane

Others

Segmentation by End-use Industries

Automotive

Furniture

Construction

Industrial

Aerospace

Others

INSIGHTS BY GEOGRAPHY

China, India, Japan, and South Korea majorly contribute to the coding additives market

growth in the APAC region. Rising disposable incomes, strong economic growth, growing construction activities, and a robust automotive industry have primarily supported market growth in the region. China stands for the world's largest EV market. In 2018, China was the home to almost 5 million low-speed electric vehicles. Currently, the country has around 2.3 million active electric vehicles, surpassing Europe and the US. Hence, the growing demand for electric and other vehicles enables the growth of the coating additives market in the automotive industry.

North America is the second-largest market for coating additives. The US is one of the largest construction markets worldwide. In the first quarter of 2020, the construction industry contributed more than USD 910 billion. The demand for greenhouse and government investment to construct non-residential projects in the region is likely to boost the demand for coating additives in the future years.

North America

US

Canada

APAC

China

India

Japan

South Korea

Indonesia

Thailand

Latin America

Brazil

Mexico

Middle East & Africa

Saudi Arabia

UAE

South Africa

Europe

Russia

Germany

France

UK

Spain

COMPETITOR LANDSCAPE

The coating additives market is highly competitive. Both key and small players dominate the market. Vendors operating in the industry focus on developing innovative products to support sustainable development and expanding their product portfolio by making considerable investments in R&D. AkzoNobel NV, BASF, BYK, Evonik Industries, and Arkema SA are the prominent players in the market. The competition will increase further due to technological advancement and expanded product lines.

Key Vendors

AkzoNobel NV

BASF

BYK

Evonik Industries

Arkema SA

Other Prominent Vendors

Sherwin Williams

King Industries Inc

Eastman Chemical Company

Dow Chemical

Lubrizol Corporation

Angus Chemical

Lonza Group

Cabot Corporation

Daikin Industries

Solvay Chemicals

Speciality Industrial Polymer

ICL Phosphate Specialty

Double Bond Chemical

Organic Dyes and Pigments LLC

Michleman INC

KEY QUESTIONS ANSWERED:

- 1 How big is the global coating additives market?
- 2 Which region holds the largest share in the paints and coating additives market?
- 3 Who are the key players in the Coating Additives Market?
- 4 Which are the major end-user segments for coating additives?
- 5 Which segment accounted for the largest coating additives market share in 2020?

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