

Global Coating Pretreatment Market 2024

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Abstracts

Coating pretreatment represents a crucial and environmentally sustainable approach to enhancing paint adhesion, improving coating adherence, and mitigating surface corrosion. This process employs low-temperature cleaners and an array of ambient pretreatment options, significantly reducing the energy expenditure required for heating while concurrently minimizing the generation of sludge and waste by the pretreatment finishing system. Predominantly utilized prior to the application of powder coating on metal substrates such as aluminum and steel, this method involves the use of finely ground pigment and resin particles. These particles, bearing an electrostatic charge, are sprayed onto electrically grounded parts. The application spectrum of pretreatment coatings spans across various sectors including automotive, construction, and aerospace industries.

In 2023, the zinc phosphate segment emerged as the predominant market share holder, attributable to its extensive utilization within the automotive sector. Valued at USD 1.3 billion in 2023, the zinc phosphate segment is projected to ascend to USD 1.9 billion by 2029, marking a Compound Annual Growth Rate (CAGR) of 5.1% over the forecast period. Zinc phosphate is particularly favored in the electrocoat industry for its superior durability, corrosion resistance, and paint adhesion capabilities. It is compatible with a range of metal substrates including steel, zinc-coated steel, and aluminum, making it a preferred choice for pretreatment processes. The escalating demand for zinc phosphate, especially as a substitute for titanium salt chemistry within the automotive industry, is anticipated to fuel optimistic market growth prospects throughout the forecast duration. Nonetheless, the phosphate segment is expected to register the highest CAGR during this period.

The aluminum segment accounted for a significant market share in 2023, attributed to its advantageous lightweight properties compared to steel. Estimated at USD 2.3 billion in 2023, the aluminum segment is forecasted to reach USD 3.4 billion by 2029, with a

CAGR of 5.6%. This growth is driven by factors such as burgeoning infrastructure projects and the manufacturing of Original Equipment Manufacturer (OEM) parts. Aluminum stands out as a strong, durable metal with high tensile strength, flexibility, and lightweight characteristics. Unlike other metals, aluminum exhibits superior resistance to rust and corrosion. The expanding application of aluminum across various end-use industries including automotive, electrical and electronics, building and construction, and aerospace presents substantial opportunities for global market expansion.

In 2023, the Asia-Pacific region dominated the market, propelled by rapid advancements in the construction sector and the automotive industry's shift towards eco-friendly products. The Asia-Pacific market, valued at USD 1.6 billion in 2023, is anticipated to grow to USD 2.3 billion by 2029, achieving a CAGR of 5.8%. This region is poised for increased construction expenditure over the forecast period, driven by swift urbanization. The burgeoning industrial sector in key emerging economies within Asia-Pacific is expected to positively influence the demand for various steel and aluminum materials, including coating pretreatments. Moreover, ongoing investments in public infrastructure development, such as offices, hospitals, and educational facilities, are likely to amplify the demand for coating pretreatment solutions.

This comprehensive industry report provides market estimates and forecasts, accompanied by a detailed examination of the product type, metal substrate, end-user, and region aspects. It delivers a quantitative analysis of the market, empowering stakeholders to leverage existing market opportunities. Furthermore, the report identifies key segments for potential opportunities and strategies, drawing insights from market trends and the approaches of leading competitors.

The global baby bottle market has been extensively analyzed by categorizing it according to various sub-segments in order to provide accurate forecasts of industry size and assess trends within specific areas.

The global market for coating pretreatment can be segmented by product type: iron phosphate, zinc phosphate, chromate, chrome-free, phosphate free, others. Zinc phosphate held the highest share in the global coating pretreatment market. However, the phosphate free segment is forecast to register the highest CAGR during the forecast period 2024 %li%2030.

Coating pretreatment market is further segmented by metal substrate: steel, aluminum, others. Aluminum held the largest share in the global coating pretreatment market,

accounting for 57.2% of the market in 2023. Moreover, the segment is anticipated to grow at the highest CAGR in the coming years.

Based on end-user, the coating pretreatment market is segmented into: automotive, construction, aerospace, household appliances, others. The automotive segment is estimated to account for the largest share of the global coating pretreatment market, representing more than 36.1% of the total market.

On the basis of region, the coating pretreatment market also can be divided into: North America, Europe, Asia-Pacific, MEA (Middle East and Africa), Latin America. Asia-Pacific held the largest share in the global coating pretreatment market, accounting for 38.4% of the market in 2023. Moreover, the region is anticipated to grow at the highest CAGR in the coming years.

The report also provides analysis of the key companies of the industry and their detailed company profiles including PPG Industries Inc., Nippon Paint Holdings Co., Ltd., Henkel AG & Co. KGaA, BASF SE, Sherwin-Williams Company, Akzo Nobel N.V., Axalta Coating Systems Ltd., among others. In this report, key players and their strategies are thoroughly analyzed to understand the competitive outlook of the market.

Why Choose This Report

Gain a reliable outlook of the global coating pretreatment market forecasts from 2024 to 2030 across scenarios.

Identify growth segments for investment.

Stay ahead of competitors through company profiles and market data.

The market estimate for ease of analysis across scenarios in Excel format.

Strategy consulting and research support for three months.

Print authentication provided for the single-user license.

Market Segments Covered in Global Coating Pretreatment Industry Analysis:

i.) Product type

Iron phosphate

Zinc phosphate

Chromate

Chrome-free

Phosphate free

Others

ii.) Metal substrate

Steel

Aluminum

Others

iii.) End-user

Automotive

Construction

Aerospace

Household appliances

Others

iv.) Region

North America

Europe

Asia-Pacific

MEA (Middle East and Africa)

Latin America

Contents

PART 1. INTRODUCTION

- 1.1 Description
- 1.2 Objectives of The Study
- 1.3 Market Segment
- 1.4 Years Considered for The Report
- 1.5 Currency
- 1.6 Key Target Audience

PART 2. RESEARCH METHODOLOGY

- 2.1 Primary Research
- 2.2 Secondary Research

PART 3. EXECUTIVE SUMMARY

PART 4. MARKET OVERVIEW

- 4.1 Introduction
- 4.2 Drivers
- 4.3 Restraints

PART 5. GLOBAL COATING PRETREATMENT MARKET BY PRODUCT TYPE

- 5.1 Iron phosphate
- 5.2 Zinc phosphate
- 5.3 Chromate
- 5.4 Chrome-free
- 5.5 Phosphate free
- 5.6 Others

PART 6. GLOBAL COATING PRETREATMENT MARKET BY METAL SUBSTRATE

- 6.1 Steel
- 6.2 Aluminum
- 6.3 Others

PART 7. GLOBAL COATING PRETREATMENT MARKET BY END-USER

- 7.1 Automotive
- 7.2 Construction
- 7.3 Aerospace
- 7.4 Household appliances
- 7.5 Others

PART 8. GLOBAL COATING PRETREATMENT MARKET BY REGION

- 8.1 North America
- 8.2 Europe
- 8.3 Asia-Pacific
- 8.4 MEA (Middle East and Africa)
- 8.5 Latin America

PART 9. COMPANY PROFILES

- 9.1 PPG Industries Inc.
 - 9.2 Nippon Paint Holdings Co., Ltd.
 - 9.3 Henkel AG & Co. KGaA
 - 9.4 BASF SE
 - 9.5 Sherwin-Williams Company
 - 9.6 Akzo Nobel N.V.
 - 9.7 Axalta Coating Systems Ltd.
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