

Global Car Restoration Material Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Car Restoration Material market size is expected to reach \$ 5265 million by 2032, rising at a market growth of 5.2% CAGR during the forecast period (2026-2032).

Car Restoration Material refers to the chemical materials and consumable systems used to recover the structural integrity, corrosion resistance, surface geometry, color, gloss, sealing performance and appearance of damaged, aged or deteriorated passenger vehicles. The research scope covers surface cleaners and pretreatments, rust removers and converters, polyester body fillers, glazing putties, primers and surfacers, basecoats, clearcoats, panel-bonding adhesives, seam sealers, cavity waxes, underbody and stone-chip coatings, and polishing compounds. These materials are formulated with polyester, epoxy, polyurethane, acrylic, alkyd, silane-modified polymer, wax-based or inorganic chemical systems and are applied through sanding, chemical treatment, filling, bonding, sealing, spraying, curing and polishing processes. Key technical parameters include substrate compatibility, adhesion, filling capacity, sanding performance, curing time, film thickness, color accuracy, gloss retention, impact resistance, corrosion protection, weatherability and ready-to-use VOC content. Car Restoration Material is supplied in economy repair, standard professional, premium OEM-approved, classic vehicle restoration and concours-quality grades for collision repair, used-car refurbishment, classic and collector vehicle restoration, corrosion treatment, body-panel repair, paint refinishing, plastic repair, underbody protection and DIY restoration.

Key Findings

Refinish coatings and protective finishes constitute the principal value pool

within the Car Restoration Material market

Waterborne low-VOC and high-efficiency curing systems are becoming central directions for professional restoration materials

Professional body shops and specialist restoration workshops form the core customer base while DIY demand remains fragmented

Color accuracy substrate compatibility corrosion protection and repair-process efficiency determine professional supplier qualification

Classic and concours restoration supports premium materials designed for authenticity durability and superior surface appearance

Market Trends

The Car Restoration Material industry is shifting from independently selected repair chemicals toward integrated material systems covering pretreatment, filling, priming, color application, clear coating, bonding, sealing, corrosion protection and polishing. Professional repairers increasingly favor compatible product families because interactions among substrates, fillers, primers, basecoats, clearcoats and curing conditions directly affect adhesion, color consistency and long-term durability. Waterborne basecoats, low-VOC coatings and high-solids systems continue to replace conventional solvent-intensive products in regulated and environmentally sensitive markets. At the same time, fast-drying primers and clearcoats are gaining importance because they reduce spray-booth occupancy, energy consumption and vehicle cycle time. Recent product development also emphasizes fewer application coats, lower-temperature curing and flexible drying under ambient, infrared or heated-booth conditions. Digital color measurement, cloud-based formula retrieval and data-assisted mixing are improving color matching for aged, faded and previously repaired surfaces. Beyond coatings, the increasing use of high-strength steels, aluminum, plastics and mixed-material body structures is supporting more specialized panel adhesives, plastic-repair products and elastic seam sealers. In classic vehicle restoration, demand remains oriented toward period-appropriate colors, controllable application characteristics, corrosion remediation and finishes capable of producing high visual depth and gloss.

Market Dynamics

Drivers

Demand for Car Restoration Material is supported by the large installed vehicle population, collision repair activity, aging vehicles, used-car refurbishment, corrosion treatment and continued interest in classic and collector vehicles. Vehicle body repairs require multiple material layers rather than a single coating, creating recurring consumption of cleaners, abrasives, fillers, primers, colors, clearcoats, adhesives, sealers and polishing compounds. Used-car dealers and fleet operators use restoration materials to improve vehicle appearance, repair minor body damage and prepare vehicles for resale, while collision repair centers require materials that can reproduce the original finish and protect repaired joints and cavities. Classic vehicle owners generate additional demand because older bodies commonly require extensive rust removal, metal rebuilding, filler application, seam treatment and complete refinishing. Repair-shop economics also encourage adoption of materials that reduce drying, sanding, masking and rework time. Products with strong coverage, faster curing and reliable color matching can improve daily workshop throughput even when their unit prices are higher. Corrosion-protection requirements further support demand for cavity waxes, seam sealers and underbody coatings after panel replacement or structural repair.

Restraints

The market is constrained by volatile raw-material costs, environmental compliance expenditure, skilled-labor shortages and the technical risk of using incompatible materials. Resins, pigments, solvents, isocyanates, hardeners, additives, waxes and packaging materials are exposed to chemical feedstock and energy-price fluctuations. Professional coating systems also require spray booths, ventilation, personal protective equipment, mixing equipment, temperature control and waste-management procedures, increasing the total cost of use beyond the purchase price of the material. VOC and hazardous-air-pollutant requirements limit the formulation and application of certain solventborne products and require manufacturers and repairers to adapt products, equipment and operating practices. Waterborne systems can reduce solvent emissions but may require controlled airflow, humidity management, technician training and revised drying procedures. Product incompatibility between filler, primer, basecoat and clearcoat can cause shrinkage, lifting, poor adhesion, cracking, color variation or premature coating failure. In classic restoration, uncertain substrate history and multiple

previous repair layers increase preparation time and material consumption. Customers in price-sensitive markets may choose economy products or partial repairs, limiting demand for complete premium systems.

Opportunities

The transition toward low-emission and high-productivity body-shop operations creates significant opportunities for waterborne basecoats, low-VOC primers, high-solids clearcoats, rapid-curing products and materials that can dry at lower temperatures. These technologies can reduce energy use and accelerate vehicle movement through the repair process, providing measurable operational value to professional workshops. Another opportunity arises from mixed-material vehicle construction. Specialized adhesives, sealers and repair compounds are increasingly required for aluminum panels, high-strength steel structures, plastic bumpers and bonded body joints where conventional welding or generic filling products may be unsuitable. Corrosion restoration remains an attractive category because aging vehicles require rust converters, epoxy primers, cavity protection and underbody coatings capable of extending service life. Premium classic and collector vehicle projects provide opportunities for products offering precise color reproduction, high-build leveling, extended working time, superior polishing and long-term gloss retention. Small and independent workshops also create demand for simplified mixing ratios, compact packages and complete repair kits. Manufacturers can further differentiate through digital color tools, technical databases, training, OEM procedure support and integrated material systems that reduce the risk of application errors and repeat repairs.

Challenges

Car Restoration Material manufacturers must support a highly diverse vehicle population with substantial differences in original coating technologies, substrates, colors, repair histories and environmental exposure. Accurate color restoration is particularly difficult because an original factory color may have multiple production variants and can change through ultraviolet exposure, oxidation, polishing and previous repairs. Technicians must adjust formulas and blending techniques to match adjacent panels rather than relying only on the nominal color code. Structural and corrosion-protection materials create additional risks because an incorrect adhesive, sealer or cavity treatment can weaken the repair or allow moisture to penetrate repaired joints. Advanced materials must also deliver predictable performance under different workshop temperatures, humidity levels, spray equipment and technician practices. Environmental

requirements vary among jurisdictions, complicating global formulation, labeling and distribution strategies. Classic vehicles present further difficulties because original materials may no longer be available, body panels may contain hidden corrosion and owners may demand both historical authenticity and modern durability. Product manufacturers therefore need extensive technical support, training, color data, repair documentation and local distribution while maintaining competitive pricing across professional and DIY channels.

Industry Chain Analysis

The upstream Car Restoration Material industry chain includes petrochemical intermediates, polyester, epoxy, polyurethane, acrylic and alkyd resins, silane-modified polymers, isocyanates, curing agents, organic and inorganic pigments, metallic and pearlescent effect materials, solvents, waterborne dispersions, rheology modifiers, corrosion inhibitors, adhesion promoters, fillers, waxes and polishing minerals. Packaging suppliers provide metal cans, plastic containers, cartridges, aerosol cans, mixing cups and dispensing systems. Raw-material selection determines curing behavior, adhesion, sanding properties, flexibility, chemical resistance, color stability, gloss and weatherability. Pigments and effect materials are particularly important in refinish coatings because variations in particle size, orientation and concentration can affect color matching. Resin, solvent, pigment and energy costs have a direct influence on material pricing, while environmental and occupational requirements increase expenditure on formulation development, emissions control, safety data, testing and regulatory documentation.

The midstream stage covers formulation, dispersion, color development, blending, filling, quality testing, technical approval and packaging. Coating manufacturers develop complete systems in which primers, basecoats, clearcoats, thinners, hardeners and additives are validated for combined use. Adhesive and sealant manufacturers focus on bonding strength, elasticity, moisture resistance, curing speed and compatibility with painted or bare substrates. Value creation increasingly extends beyond material production to color databases, spectrophotometers, mixing software, training, repair-process design and technical field service. Downstream customers include collision repair centers, OEM-authorized workshops, independent body shops, classic vehicle restoration specialists, used-car reconditioning facilities, custom-car builders, motorsport workshops, automotive dealers, parts retailers, e-commerce platforms and DIY users. Professional channels generally provide higher recurring volumes, while specialist classic and concours projects support higher-value products but involve

smaller batch demand and longer project cycles.

Segment Insights

By restoration function, primers, surfacers, basecoats and clearcoats represent the central material system because they determine corrosion resistance, surface leveling, color and final appearance. Body fillers and glazing putties account for recurring consumption in dent repair, panel reshaping and corrosion-damaged body restoration. Panel-bonding adhesives and seam sealers form a technically demanding segment in structural and joint repairs, while cavity waxes, underbody coatings and stone-chip materials provide longer-term protection after bodywork. Surface cleaners, rust treatments and polishing compounds generally have lower unit values but are required at multiple stages of the restoration process. Demand therefore favors manufacturers able to provide a coordinated system rather than a narrow single-product range.

By resin chemistry, polyester systems are widely used in body fillers because of their filling capacity, curing speed and sandability. Epoxy products are valued for substrate adhesion and corrosion resistance, particularly on bare metal and restoration projects requiring strong barrier protection. Polyurethane and acrylic systems are important in primers, basecoats, clearcoats, sealants and flexible repair materials because they provide a balance of appearance, durability and processing performance. Silane-modified polymers are positioned in elastic bonding and sealing applications, while wax-based products remain important for inaccessible cavities and internal corrosion protection. By professional grade, economy and standard products serve high-volume price-sensitive repairs, premium OEM-approved materials address controlled professional processes, and classic or concours-quality products emphasize appearance, authenticity, workability and long-term finish performance.

Downstream Market Opportunities

Professional collision repair represents the broadest recurring opportunity because each damaged vehicle may consume several coordinated material categories from preparation through final polishing. Used-car refurbishment offers growing potential for rapid primers, spot-repair coatings, plastic-repair materials and polishing compounds that improve resale appearance without requiring complete vehicle refinishing. Classic, antique and collector car projects create smaller but higher-value demand for rust treatment, epoxy protection, high-build fillers, specialized color systems and premium clear finishes. Custom-car, hot-rod and motorsport workshops require distinctive colors,

effect pigments, durable finishes and repairable coating systems. Corrosion-prone vehicles generate opportunities for cavity waxes, seam sealers, underbody and stone-chip coatings, particularly where owners seek to extend vehicle life. Plastic bumper and trim repair provides additional demand as repairers attempt to retain original components rather than replace them. DIY restoration remains fragmented but supports aerosols, small packages, repair kits and simplified products distributed through automotive retailers and online channels. Suppliers that combine product availability, application guidance, color support and technician training are better positioned to convert these diverse downstream needs into repeat material purchases.

Regional Insights

North America and Europe are mature high-value markets for Car Restoration Material, supported by large vehicle fleets, established collision-repair networks, specialist classic-car communities and developed automotive aftermarket distribution. North American demand covers both professional body shops and a broad DIY channel, with significant consumption of fillers, primers, coatings, adhesives, corrosion-protection products and polishing materials. Environmental rules governing automobile refinish coatings and body-shop air emissions encourage the adoption of compliant coating systems, controlled spray practices and technician training. Europe has similarly established limits on ready-to-use VOC content for vehicle refinishing products, supporting waterborne basecoats, low-VOC primers and high-solids finishes. European restoration demand also benefits from a substantial base of historic and collector vehicles, although individual national markets differ in workshop structure, vehicle age and regulatory enforcement.

Asia-Pacific represents an important manufacturing and developing consumption region. China has a large vehicle population, extensive body-repair capacity and growing adoption of waterborne refinish systems in more regulated urban and OEM-authorized repair channels. Japan has established coating and automotive-material manufacturers and a professional repair market emphasizing quality and process control. Southeast Asia and other emerging Asian markets retain stronger demand for economical solventborne and standard professional materials, but rising environmental requirements and investments by international vehicle brands are supporting gradual technology upgrades. Latin America, the Middle East and Africa provide additional opportunities through aging vehicle fleets, used-car imports, collision repair and corrosion-related restoration, although demand is more price sensitive and distribution networks are less standardized. Across emerging regions, local technical support,

smaller package sizes, reliable color formulas and compatibility with widely used vehicle models are important competitive factors.

Competitive Landscape Analysis

The Car Restoration Material market has a layered competitive structure involving global automotive refinish coating groups, diversified adhesive and chemical companies, specialist body-filler and restoration-material manufacturers, and regional coating producers. Large refinish companies compete through broad primer, basecoat and clearcoat portfolios, extensive color databases, mixing systems, digital color tools, OEM approvals, training networks and global distribution. Adhesive and sealant suppliers differentiate through structural bonding, seam replication, corrosion protection, glass bonding, noise reduction and compatibility with modern vehicle body construction. Specialist manufacturers compete in fillers, putties, rust treatments, classic-car coatings and polishing materials, where application performance and workshop reputation can be more important than global scale. Regional suppliers generally use local production, competitive pricing, flexible formulation and distributor relationships to serve independent repair shops. Professional customers increasingly prefer complete systems because using validated products from preparation through final finishing can reduce incompatibility and warranty risks. Competitive advantage therefore depends not only on coating performance but also on color accuracy, curing efficiency, VOC compliance, technical support, product availability and the ability to reproduce consistent results across different technicians and workshop conditions. Premium OEM-approved and concours-quality segments provide stronger differentiation, while economy repair grades remain exposed to intense price competition.

Report Scope

This report studies the global Car Restoration Material demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Car Restoration Material, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Car Restoration Material that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Car Restoration Material total market, 2021-2032, (USD Million)

Global Car Restoration Material total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Car Restoration Material total market, key domestic companies, and share, (USD Million)

Global Car Restoration Material revenue by player, revenue and market share 2021-2026, (USD Million)

Global Car Restoration Material total market by Restoration Function, CAGR, 2021-2032, (USD Million)

Global Car Restoration Material total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Car Restoration Material market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include 3M Company, PPG Industries, Inc., Axalta Coating Systems Ltd., BASF Coatings GmbH, Akzo Nobel N.V., The Sherwin-Williams Company, Henkel AG & Co. KGaA, Sika AG, Illinois Tool Works Inc. (ITW Evercoat), MIPA SE, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Car Restoration Material market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Restoration Function, and by Application. Data is

given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Car Restoration Material Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Car Restoration Material Market, Segmentation by Restoration Function:

Surface Preparation and Cleaning Materials

Rust Removal and Conversion Materials

Body Fillers and Glazing Putties

Primers and Surfacer

Basecoats and Color Coatings

Clearcoats and Protective Finishes

Others

Global Car Restoration Material Market, Segmentation by Primary Resin Chemistry:

Polyester-Based Car Restoration Materials

Epoxy-Based Car Restoration Materials

Polyurethane-Based Car Restoration Materials

Acrylic-Based Car Restoration Materials

Others

Global Car Restoration Material Market, Segmentation by Ready-to-Use VOC Content:

VOC-Free

Low-VOC Materials (<250 g/L)

Medium-VOC Materials (250–420 g/L)

High-VOC Materials (>420 g/L)

Global Car Restoration Material Market, Segmentation by Application:

Classic and Collector Car Restoration

Antique and Vintage Car Restoration

Collision-Damaged Vehicle Repair

Others

Companies Profiled:

3M Company

PPG Industries, Inc.

Axalta Coating Systems Ltd.

BASF Coatings GmbH

Akzo Nobel N.V.

The Sherwin-Williams Company

Henkel AG & Co. KGaA

Sika AG

Illinois Tool Works Inc. (ITW Evercoat)

MIPA SE

Roberlo S.A.U.

Nippon Paint Co., Ltd.

Rock Paint Co., Ltd.

YATU Advanced Materials Co., Ltd.

Key Questions Answered

1. How big is the global Car Restoration Material market?

2. What is the demand of the global Car Restoration Material market?
3. What is the year over year growth of the global Car Restoration Material market?
4. What is the total value of the global Car Restoration Material market?
5. Who are the Major Players in the global Car Restoration Material market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Car Restoration Material Introduction
- 1.2 World Car Restoration Material Market Size & Forecast (2021 & 2025 & 2032)
- 1.3 World Car Restoration Material Total Market by Region (by Headquarter Location)
 - 1.3.1 World Car Restoration Material Market Size by Region (2021-2032), (by Headquarter Location)
 - 1.3.2 United States Based Company Car Restoration Material Revenue (2021-2032)
 - 1.3.3 China Based Company Car Restoration Material Revenue (2021-2032)
 - 1.3.4 Europe Based Company Car Restoration Material Revenue (2021-2032)
 - 1.3.5 Japan Based Company Car Restoration Material Revenue (2021-2032)
 - 1.3.6 South Korea Based Company Car Restoration Material Revenue (2021-2032)
 - 1.3.7 ASEAN Based Company Car Restoration Material Revenue (2021-2032)
 - 1.3.8 India Based Company Car Restoration Material Revenue (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Car Restoration Material Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Car Restoration Material Consumption Value (2021-2032)
- 2.2 World Car Restoration Material Consumption Value by Region
 - 2.2.1 World Car Restoration Material Consumption Value by Region (2021-2026)
 - 2.2.2 World Car Restoration Material Consumption Value Forecast by Region (2027-2032)
- 2.3 United States Car Restoration Material Consumption Value (2021-2032)
- 2.4 China Car Restoration Material Consumption Value (2021-2032)
- 2.5 Europe Car Restoration Material Consumption Value (2021-2032)
- 2.6 Japan Car Restoration Material Consumption Value (2021-2032)
- 2.7 South Korea Car Restoration Material Consumption Value (2021-2032)
- 2.8 ASEAN Car Restoration Material Consumption Value (2021-2032)
- 2.9 India Car Restoration Material Consumption Value (2021-2032)

3 WORLD CAR RESTORATION MATERIAL COMPANIES COMPETITIVE ANALYSIS

- 3.1 World Car Restoration Material Revenue by Player (2021-2026)

3.2 Industry Rank and Concentration Rate (CR)

3.2.1 Global Car Restoration Material Industry Rank of Major Players

3.2.2 Global Concentration Ratios (CR4) for Car Restoration Material in 2025

3.2.3 Global Concentration Ratios (CR8) for Car Restoration Material in 2025

3.3 Car Restoration Material Company Evaluation Quadrant

3.4 Car Restoration Material Market: Overall Company Footprint Analysis

3.4.1 Car Restoration Material Market: Region Footprint

3.4.2 Car Restoration Material Market: Company Product Type Footprint

3.4.3 Car Restoration Material Market: Company Product Application Footprint

3.5 Competitive Environment

3.5.1 Historical Structure of the Industry

3.5.2 Barriers of Market Entry

3.5.3 Factors of Competition

3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

4.1 United States VS China: Car Restoration Material Revenue Comparison (by Headquarter Location)

4.1.1 United States VS China: Car Restoration Material Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)

4.1.2 United States VS China: Car Restoration Material Revenue Market Share Comparison (2021 & 2025 & 2032)

4.2 United States Based Companies VS China Based Companies: Car Restoration Material Consumption Value Comparison

4.2.1 United States VS China: Car Restoration Material Consumption Value Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Car Restoration Material Consumption Value Market Share Comparison (2021 & 2025 & 2032)

4.3 United States Based Car Restoration Material Companies and Market Share, 2021-2026

4.3.1 United States Based Car Restoration Material Companies, Headquarters (States, Country)

4.3.2 United States Based Companies Car Restoration Material Revenue, (2021-2026)

4.4 China Based Companies Car Restoration Material Revenue and Market Share, 2021-2026

4.4.1 China Based Car Restoration Material Companies, Company Headquarters (Province, Country)

- 4.4.2 China Based Companies Car Restoration Material Revenue, (2021-2026)
- 4.5 Rest of World Based Car Restoration Material Companies and Market Share, 2021-2026
 - 4.5.1 Rest of World Based Car Restoration Material Companies, Headquarters (Province, Country)
 - 4.5.2 Rest of World Based Companies Car Restoration Material Revenue (2021-2026)

5 MARKET ANALYSIS BY RESTORATION FUNCTION

- 5.1 World Car Restoration Material Market Size Overview by Restoration Function: 2021 VS 2025 VS 2032
- 5.2 Segment Introduction by Restoration Function
 - 5.2.1 Surface Preparation and Cleaning Materials
 - 5.2.2 Rust Removal and Conversion Materials
 - 5.2.3 Body Fillers and Glazing Putties
 - 5.2.4 Primers and Surfacers
 - 5.2.5 Basecoats and Color Coatings
 - 5.2.6 Clearcoats and Protective Finishes
 - 5.2.7 Others
- 5.3 Market Segment by Restoration Function
 - 5.3.1 World Car Restoration Material Market Size by Restoration Function (2021-2026)
 - 5.3.2 World Car Restoration Material Market Size by Restoration Function (2027-2032)
 - 5.3.3 World Car Restoration Material Market Size Market Share by Restoration Function (2027-2032)

6 MARKET ANALYSIS BY PRIMARY RESIN CHEMISTRY

- 6.1 World Car Restoration Material Market Size Overview by Primary Resin Chemistry: 2021 VS 2025 VS 2032
- 6.2 Segment Introduction by Primary Resin Chemistry
 - 6.2.1 Polyester-Based Car Restoration Materials
 - 6.2.2 Epoxy-Based Car Restoration Materials
 - 6.2.3 Polyurethane-Based Car Restoration Materials
 - 6.2.4 Acrylic-Based Car Restoration Materials
 - 6.2.5 Others
- 6.3 Market Segment by Primary Resin Chemistry
 - 6.3.1 World Car Restoration Material Market Size by Primary Resin Chemistry (2021-2026)
 - 6.3.2 World Car Restoration Material Market Size by Primary Resin Chemistry

(2027-2032)

6.3.3 World Car Restoration Material Market Size Market Share by Primary Resin Chemistry (2027-2032)

7 MARKET ANALYSIS BY READY-TO-USE VOC CONTENT

7.1 World Car Restoration Material Market Size Overview by Ready-to-Use VOC Content: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Ready-to-Use VOC Content

7.2.1 VOC-Free

7.2.2 Low-VOC Materials (<250 g/L)

7.2.3 Medium-VOC Materials (250–420 g/L)

7.2.4 High-VOC Materials (>420 g/L)

7.3 Market Segment by Ready-to-Use VOC Content

7.3.1 World Car Restoration Material Market Size by Ready-to-Use VOC Content (2021-2026)

7.3.2 World Car Restoration Material Market Size by Ready-to-Use VOC Content (2027-2032)

7.3.3 World Car Restoration Material Market Size Market Share by Ready-to-Use VOC Content (2027-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Car Restoration Material Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Classic and Collector Car Restoration

8.2.2 Antique and Vintage Car Restoration

8.2.3 Collision-Damaged Vehicle Repair

8.2.4 Others

8.3 Market Segment by Application

8.3.1 World Car Restoration Material Market Size by Application (2021-2026)

8.3.2 World Car Restoration Material Market Size by Application (2027-2032)

8.3.3 World Car Restoration Material Market Size Market Share by Application (2021-2032)

9 COMPANY PROFILES

9.1 3M Company

- 9.1.1 3M Company Details
- 9.1.2 3M Company Major Business
- 9.1.3 3M Company Car Restoration Material Product and Services
- 9.1.4 3M Company Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026)
- 9.1.5 3M Company Recent Developments/Updates
- 9.1.6 3M Company Competitive Strengths & Weaknesses
- 9.2 PPG Industries, Inc.
 - 9.2.1 PPG Industries, Inc. Details
 - 9.2.2 PPG Industries, Inc. Major Business
 - 9.2.3 PPG Industries, Inc. Car Restoration Material Product and Services
 - 9.2.4 PPG Industries, Inc. Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026)
 - 9.2.5 PPG Industries, Inc. Recent Developments/Updates
 - 9.2.6 PPG Industries, Inc. Competitive Strengths & Weaknesses
- 9.3 Axalta Coating Systems Ltd.
 - 9.3.1 Axalta Coating Systems Ltd. Details
 - 9.3.2 Axalta Coating Systems Ltd. Major Business
 - 9.3.3 Axalta Coating Systems Ltd. Car Restoration Material Product and Services
 - 9.3.4 Axalta Coating Systems Ltd. Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026)
 - 9.3.5 Axalta Coating Systems Ltd. Recent Developments/Updates
 - 9.3.6 Axalta Coating Systems Ltd. Competitive Strengths & Weaknesses
- 9.4 BASF Coatings GmbH
 - 9.4.1 BASF Coatings GmbH Details
 - 9.4.2 BASF Coatings GmbH Major Business
 - 9.4.3 BASF Coatings GmbH Car Restoration Material Product and Services
 - 9.4.4 BASF Coatings GmbH Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026)
 - 9.4.5 BASF Coatings GmbH Recent Developments/Updates
 - 9.4.6 BASF Coatings GmbH Competitive Strengths & Weaknesses
- 9.5 Akzo Nobel N.V.
 - 9.5.1 Akzo Nobel N.V. Details
 - 9.5.2 Akzo Nobel N.V. Major Business
 - 9.5.3 Akzo Nobel N.V. Car Restoration Material Product and Services
 - 9.5.4 Akzo Nobel N.V. Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Akzo Nobel N.V. Recent Developments/Updates
 - 9.5.6 Akzo Nobel N.V. Competitive Strengths & Weaknesses

9.6 The Sherwin-Williams Company

9.6.1 The Sherwin-Williams Company Details

9.6.2 The Sherwin-Williams Company Major Business

9.6.3 The Sherwin-Williams Company Car Restoration Material Product and Services

9.6.4 The Sherwin-Williams Company Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026)

9.6.5 The Sherwin-Williams Company Recent Developments/Updates

9.6.6 The Sherwin-Williams Company Competitive Strengths & Weaknesses

9.7 Henkel AG & Co. KGaA

9.7.1 Henkel AG & Co. KGaA Details

9.7.2 Henkel AG & Co. KGaA Major Business

9.7.3 Henkel AG & Co. KGaA Car Restoration Material Product and Services

9.7.4 Henkel AG & Co. KGaA Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026)

9.7.5 Henkel AG & Co. KGaA Recent Developments/Updates

9.7.6 Henkel AG & Co. KGaA Competitive Strengths & Weaknesses

9.8 Sika AG

9.8.1 Sika AG Details

9.8.2 Sika AG Major Business

9.8.3 Sika AG Car Restoration Material Product and Services

9.8.4 Sika AG Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026)

9.8.5 Sika AG Recent Developments/Updates

9.8.6 Sika AG Competitive Strengths & Weaknesses

9.9 Illinois Tool Works Inc. (ITW Evercoat)

9.9.1 Illinois Tool Works Inc. (ITW Evercoat) Details

9.9.2 Illinois Tool Works Inc. (ITW Evercoat) Major Business

9.9.3 Illinois Tool Works Inc. (ITW Evercoat) Car Restoration Material Product and Services

9.9.4 Illinois Tool Works Inc. (ITW Evercoat) Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026)

9.9.5 Illinois Tool Works Inc. (ITW Evercoat) Recent Developments/Updates

9.9.6 Illinois Tool Works Inc. (ITW Evercoat) Competitive Strengths & Weaknesses

9.10 MIPA SE

9.10.1 MIPA SE Details

9.10.2 MIPA SE Major Business

9.10.3 MIPA SE Car Restoration Material Product and Services

9.10.4 MIPA SE Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026)

- 9.10.5 MIPA SE Recent Developments/Updates
- 9.10.6 MIPA SE Competitive Strengths & Weaknesses
- 9.11 Roberlo S.A.U.
 - 9.11.1 Roberlo S.A.U. Details
 - 9.11.2 Roberlo S.A.U. Major Business
 - 9.11.3 Roberlo S.A.U. Car Restoration Material Product and Services
 - 9.11.4 Roberlo S.A.U. Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026)
 - 9.11.5 Roberlo S.A.U. Recent Developments/Updates
 - 9.11.6 Roberlo S.A.U. Competitive Strengths & Weaknesses
- 9.12 Nippon Paint Co., Ltd.
 - 9.12.1 Nippon Paint Co., Ltd. Details
 - 9.12.2 Nippon Paint Co., Ltd. Major Business
 - 9.12.3 Nippon Paint Co., Ltd. Car Restoration Material Product and Services
 - 9.12.4 Nippon Paint Co., Ltd. Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Nippon Paint Co., Ltd. Recent Developments/Updates
 - 9.12.6 Nippon Paint Co., Ltd. Competitive Strengths & Weaknesses
- 9.13 Rock Paint Co., Ltd.
 - 9.13.1 Rock Paint Co., Ltd. Details
 - 9.13.2 Rock Paint Co., Ltd. Major Business
 - 9.13.3 Rock Paint Co., Ltd. Car Restoration Material Product and Services
 - 9.13.4 Rock Paint Co., Ltd. Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026)
 - 9.13.5 Rock Paint Co., Ltd. Recent Developments/Updates
 - 9.13.6 Rock Paint Co., Ltd. Competitive Strengths & Weaknesses
- 9.14 YATU Advanced Materials Co., Ltd.
 - 9.14.1 YATU Advanced Materials Co., Ltd. Details
 - 9.14.2 YATU Advanced Materials Co., Ltd. Major Business
 - 9.14.3 YATU Advanced Materials Co., Ltd. Car Restoration Material Product and Services
 - 9.14.4 YATU Advanced Materials Co., Ltd. Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026)
 - 9.14.5 YATU Advanced Materials Co., Ltd. Recent Developments/Updates
 - 9.14.6 YATU Advanced Materials Co., Ltd. Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Car Restoration Material Industry Chain

- 10.2 Car Restoration Material Upstream Analysis
- 10.3 Car Restoration Material Midstream Analysis
- 10.4 Car Restoration Material Downstream Analysis

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

- 12.1 Methodology
- 12.2 Research Process and Data Source
- 12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Car Restoration Material Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Table 2. World Car Restoration Material Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)

Table 3. World Car Restoration Material Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)

Table 4. World Car Restoration Material Revenue Market Share by Region (2021-2026), (by Headquarter Location)

Table 5. World Car Restoration Material Revenue Market Share by Region (2027-2032), (by Headquarter Location)

Table 6. Major Market Trends

Table 7. World Car Restoration Material Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)

Table 8. World Car Restoration Material Consumption Value by Region (2021-2026) & (USD Million)

Table 9. World Car Restoration Material Consumption Value Forecast by Region (2027-2032) & (USD Million)

Table 10. World Car Restoration Material Revenue by Player (2021-2026) & (USD Million)

Table 11. Revenue Market Share of Key Car Restoration Material Players in 2025

Table 12. World Car Restoration Material Industry Rank of Major Player, Based on Revenue in 2025

Table 13. Global Car Restoration Material Company Evaluation Quadrant

Table 14. Head Office of Key Car Restoration Material Players

Table 15. Car Restoration Material Market: Company Product Type Footprint

Table 16. Car Restoration Material Market: Company Product Application Footprint

Table 17. Car Restoration Material Mergers & Acquisitions Activity

Table 18. United States VS China Car Restoration Material Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 19. United States VS China Car Restoration Material Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 20. United States Based Car Restoration Material Companies, Headquarters (States, Country)

Table 21. United States Based Companies Car Restoration Material Revenue, (2021-2026) & (USD Million)

Table 22. United States Based Companies Car Restoration Material Revenue Market Share (2021-2026)

Table 23. China Based Car Restoration Material Companies, Headquarters (Province, Country)

Table 24. China Based Companies Car Restoration Material Revenue, (2021-2026) & (USD Million)

Table 25. China Based Companies Car Restoration Material Revenue Market Share (2021-2026)

Table 26. Rest of World Based Car Restoration Material Companies, Headquarters (Province, Country)

Table 27. Rest of World Based Companies Car Restoration Material Revenue (2021-2026) & (USD Million)

Table 28. Rest of World Based Companies Car Restoration Material Revenue Market Share (2021-2026)

Table 29. World Car Restoration Material Market Size by Restoration Function, (USD Million), 2021 & 2025 & 2032

Table 30. World Car Restoration Material Market Size Value by Restoration Function (2021-2026) & (USD Million)

Table 31. World Car Restoration Material Market Size by Restoration Function (2027-2032) & (USD Million)

Table 32. World Car Restoration Material Market Size by Primary Resin Chemistry, (USD Million), 2021 & 2025 & 2032

Table 33. World Car Restoration Material Market Size Value by Primary Resin Chemistry (2021-2026) & (USD Million)

Table 34. World Car Restoration Material Market Size by Primary Resin Chemistry (2027-2032) & (USD Million)

Table 35. World Car Restoration Material Market Size by Ready-to-Use VOC Content, (USD Million), 2021 & 2025 & 2032

Table 36. World Car Restoration Material Market Size Value by Ready-to-Use VOC Content (2021-2026) & (USD Million)

Table 37. World Car Restoration Material Market Size by Ready-to-Use VOC Content (2027-2032) & (USD Million)

Table 38. World Car Restoration Material Market Size by Application, (USD Million), 2021 & 2025 & 2032

Table 39. World Car Restoration Material Market Size by Application (2021-2026) & (USD Million)

Table 40. World Car Restoration Material Market Size by Application (2027-2032) & (USD Million)

Table 41. 3M Company Basic Information, Manufacturing Base and Competitors

Table 42. 3M Company Major Business
Table 43. 3M Company Car Restoration Material Product and Services
Table 44. 3M Company Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 45. 3M Company Recent Developments/Updates
Table 46. 3M Company Competitive Strengths & Weaknesses
Table 47. PPG Industries, Inc. Basic Information, Manufacturing Base and Competitors
Table 48. PPG Industries, Inc. Major Business
Table 49. PPG Industries, Inc. Car Restoration Material Product and Services
Table 50. PPG Industries, Inc. Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 51. PPG Industries, Inc. Recent Developments/Updates
Table 52. PPG Industries, Inc. Competitive Strengths & Weaknesses
Table 53. Axalta Coating Systems Ltd. Basic Information, Manufacturing Base and Competitors
Table 54. Axalta Coating Systems Ltd. Major Business
Table 55. Axalta Coating Systems Ltd. Car Restoration Material Product and Services
Table 56. Axalta Coating Systems Ltd. Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 57. Axalta Coating Systems Ltd. Recent Developments/Updates
Table 58. Axalta Coating Systems Ltd. Competitive Strengths & Weaknesses
Table 59. BASF Coatings GmbH Basic Information, Manufacturing Base and Competitors
Table 60. BASF Coatings GmbH Major Business
Table 61. BASF Coatings GmbH Car Restoration Material Product and Services
Table 62. BASF Coatings GmbH Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 63. BASF Coatings GmbH Recent Developments/Updates
Table 64. BASF Coatings GmbH Competitive Strengths & Weaknesses
Table 65. Akzo Nobel N.V. Basic Information, Manufacturing Base and Competitors
Table 66. Akzo Nobel N.V. Major Business
Table 67. Akzo Nobel N.V. Car Restoration Material Product and Services
Table 68. Akzo Nobel N.V. Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 69. Akzo Nobel N.V. Recent Developments/Updates
Table 70. Akzo Nobel N.V. Competitive Strengths & Weaknesses
Table 71. The Sherwin-Williams Company Basic Information, Manufacturing Base and Competitors
Table 72. The Sherwin-Williams Company Major Business

Table 73. The Sherwin-Williams Company Car Restoration Material Product and Services

Table 74. The Sherwin-Williams Company Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 75. The Sherwin-Williams Company Recent Developments/Updates

Table 76. The Sherwin-Williams Company Competitive Strengths & Weaknesses

Table 77. Henkel AG & Co. KGaA Basic Information, Manufacturing Base and Competitors

Table 78. Henkel AG & Co. KGaA Major Business

Table 79. Henkel AG & Co. KGaA Car Restoration Material Product and Services

Table 80. Henkel AG & Co. KGaA Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 81. Henkel AG & Co. KGaA Recent Developments/Updates

Table 82. Henkel AG & Co. KGaA Competitive Strengths & Weaknesses

Table 83. Sika AG Basic Information, Manufacturing Base and Competitors

Table 84. Sika AG Major Business

Table 85. Sika AG Car Restoration Material Product and Services

Table 86. Sika AG Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 87. Sika AG Recent Developments/Updates

Table 88. Sika AG Competitive Strengths & Weaknesses

Table 89. Illinois Tool Works Inc. (ITW Evercoat) Basic Information, Manufacturing Base and Competitors

Table 90. Illinois Tool Works Inc. (ITW Evercoat) Major Business

Table 91. Illinois Tool Works Inc. (ITW Evercoat) Car Restoration Material Product and Services

Table 92. Illinois Tool Works Inc. (ITW Evercoat) Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 93. Illinois Tool Works Inc. (ITW Evercoat) Recent Developments/Updates

Table 94. Illinois Tool Works Inc. (ITW Evercoat) Competitive Strengths & Weaknesses

Table 95. MIPA SE Basic Information, Manufacturing Base and Competitors

Table 96. MIPA SE Major Business

Table 97. MIPA SE Car Restoration Material Product and Services

Table 98. MIPA SE Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 99. MIPA SE Recent Developments/Updates

Table 100. MIPA SE Competitive Strengths & Weaknesses

Table 101. Roberlo S.A.U. Basic Information, Manufacturing Base and Competitors

Table 102. Roberlo S.A.U. Major Business

Table 103. Roberlo S.A.U. Car Restoration Material Product and Services
Table 104. Roberlo S.A.U. Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 105. Roberlo S.A.U. Recent Developments/Updates
Table 106. Roberlo S.A.U. Competitive Strengths & Weaknesses
Table 107. Nippon Paint Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 108. Nippon Paint Co., Ltd. Major Business
Table 109. Nippon Paint Co., Ltd. Car Restoration Material Product and Services
Table 110. Nippon Paint Co., Ltd. Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 111. Nippon Paint Co., Ltd. Recent Developments/Updates
Table 112. Nippon Paint Co., Ltd. Competitive Strengths & Weaknesses
Table 113. Rock Paint Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 114. Rock Paint Co., Ltd. Major Business
Table 115. Rock Paint Co., Ltd. Car Restoration Material Product and Services
Table 116. Rock Paint Co., Ltd. Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 117. Rock Paint Co., Ltd. Recent Developments/Updates
Table 118. Rock Paint Co., Ltd. Competitive Strengths & Weaknesses
Table 119. YATU Advanced Materials Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 120. YATU Advanced Materials Co., Ltd. Major Business
Table 121. YATU Advanced Materials Co., Ltd. Car Restoration Material Product and Services
Table 122. YATU Advanced Materials Co., Ltd. Car Restoration Material Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 123. YATU Advanced Materials Co., Ltd. Recent Developments/Updates
Table 124. YATU Advanced Materials Co., Ltd. Competitive Strengths & Weaknesses
Table 125. Global Key Players of Car Restoration Material Upstream (Raw Materials)
Table 126. Global Car Restoration Material Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. Car Restoration Material Picture

Figure 2. World Car Restoration Material Total Revenue: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Car Restoration Material Total Revenue (2021-2032) & (USD Million)

Figure 4. World Car Restoration Material Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Figure 5. World Car Restoration Material Revenue Market Share by Region (2021-2032), (by Headquarter Location)

Figure 6. United States Based Company Car Restoration Material Revenue (2021-2032) & (USD Million)

Figure 7. China Based Company Car Restoration Material Revenue (2021-2032) & (USD Million)

Figure 8. Europe Based Company Car Restoration Material Revenue (2021-2032) & (USD Million)

Figure 9. Japan Based Company Car Restoration Material Revenue (2021-2032) & (USD Million)

Figure 10. South Korea Based Company Car Restoration Material Revenue (2021-2032) & (USD Million)

Figure 11. ASEAN Based Company Car Restoration Material Revenue (2021-2032) & (USD Million)

Figure 12. India Based Company Car Restoration Material Revenue (2021-2032) & (USD Million)

Figure 13. Car Restoration Material Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Car Restoration Material Consumption Value (2021-2032) & (USD Million)

Figure 16. World Car Restoration Material Consumption Value Market Share by Region (2021-2032)

Figure 17. United States Car Restoration Material Consumption Value (2021-2032) & (USD Million)

Figure 18. China Car Restoration Material Consumption Value (2021-2032) & (USD Million)

Figure 19. Europe Car Restoration Material Consumption Value (2021-2032) & (USD Million)

Figure 20. Japan Car Restoration Material Consumption Value (2021-2032) & (USD Million)

Million)

Figure 21. South Korea Car Restoration Material Consumption Value (2021-2032) & (USD Million)

Figure 22. ASEAN Car Restoration Material Consumption Value (2021-2032) & (USD Million)

Figure 23. India Car Restoration Material Consumption Value (2021-2032) & (USD Million)

Figure 24. Producer Shipments of Car Restoration Material by Player Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Car Restoration Material Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Car Restoration Material Markets in 2025

Figure 27. United States VS China: Car Restoration Material Revenue Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Car Restoration Material Consumption Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. World Car Restoration Material Market Size by Restoration Function, (USD Million), 2021 & 2025 & 2032

Figure 30. World Car Restoration Material Market Size Market Share by Restoration Function in 2025

Figure 31. Surface Preparation and Cleaning Materials

Figure 32. Rust Removal and Conversion Materials

Figure 33. Body Fillers and Glazing Putties

Figure 34. Primers and Surfacer

Figure 35. Basecoats and Color Coatings

Figure 36. Clearcoats and Protective Finishes

Figure 37. Others

Figure 38. Others

Figure 39. World Car Restoration Material Market Size Market Share by Restoration Function (2021-2032)

Figure 40. World Car Restoration Material Market Size by Primary Resin Chemistry, (USD Million), 2021 & 2025 & 2032

Figure 41. World Car Restoration Material Market Size Market Share by Primary Resin Chemistry in 2025

Figure 42. Polyester-Based Car Restoration Materials

Figure 43. Epoxy-Based Car Restoration Materials

Figure 44. Polyurethane-Based Car Restoration Materials

Figure 45. Acrylic-Based Car Restoration Materials

Figure 46. Others

Figure 47. World Car Restoration Material Market Size Market Share by Primary Resin Chemistry (2021-2032)

Figure 48. World Car Restoration Material Market Size by Ready-to-Use VOC Content, (USD Million), 2021 & 2025 & 2032

Figure 49. World Car Restoration Material Market Size Market Share by Ready-to-Use VOC Content in 2025

Figure 50. VOC-Free

Figure 51. Low-VOC Materials (<250 g/L)

Figure 52. Medium-VOC Materials (250–420 g/L)

Figure 53. High-VOC Materials (>420 g/L)

Figure 54. World Car Restoration Material Market Size Market Share by Ready-to-Use VOC Content (2021-2032)

Figure 55. World Car Restoration Material Market Size by Application, (USD Million), 2021 & 2025 & 2032

Figure 56. World Car Restoration Material Market Size Market Share by Application in 2025

Figure 57. Classic and Collector Car Restoration

Figure 58. Antique and Vintage Car Restoration

Figure 59. Collision-Damaged Vehicle Repair

Figure 60. Others

Figure 61. World Car Restoration Material Market Size Market Share by Application (2021-2032)

Figure 62. Car Restoration Material Industrial Chain

Figure 63. Methodology

Figure 64. Research Process and Data Source

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