

Global Marine Anti-Fouling Coatings Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GD4EC491562CEN.html>

Date: July 2026

Pages: 162

Price: US\$ 4,480.00 (Single User License)

ID: GD4EC491562CEN

Abstracts

The global Marine Anti-Fouling Coatings market size is expected to reach \$ 6563 million by 2032, rising at a market growth of 4.8% CAGR during the forecast period (2026-2032).

Marine antifouling coatings are functional marine coatings applied to areas such as the hull below the waterline, rudders, sea chests, and propellers—as well as other parts permanently submerged in water. They primarily utilize systems such as self-polishing copolymers, controlled-dissolution resins, copper-based or copper-free antifouling agents, silicone-based fouling-release technologies, and low-friction hydrogels to inhibit the attachment of barnacles, algae, shellfish, and biofilms, thereby reducing hull resistance, fuel consumption, and the frequency of dry-docking. In 2025, global sales volume for marine antifouling coatings was approximately 675,000 metric tons, with an average unit price of around \$6,850 per ton and a global capacity utilization rate of approximately 72.4%. Upstream industry players primarily include manufacturers of acrylic resins, silicone resins, rosin and modified resins, cuprous oxide, antifouling active agents, titanium dioxide, pigments and fillers, solvents, and additives. Downstream entities mainly comprise commercial shipowners, fleet management companies, shipyards, ship repair yards, procurement agencies for naval and government vessels, yacht manufacturers, yacht repair facilities, and marine coating service providers; the industry's average gross profit margin is approximately 31.5%. Regarding the cost structure, resins and film-forming agents account for about 24%, cuprous oxide and organic antifouling agents for about 28%, pigments and fillers for about 11%, and solvents and additives for about 10%. ...%; packaging accounts for approximately 4%; energy and labor for about 8%; manufacturing depreciation and environmental treatment for around 5%; logistics and warehousing for about 4%; and R&D, quality control, and certification for approximately 6%. The demand profile

encompasses requirements for newbuild ocean-going vessel coatings, dry-dock recoating, energy-efficiency retrofitting for aging hulls, primers for yachts and leisure craft, long-term anti-fouling for naval and government vessels, and anti-fouling for offshore support and work vessels operating at low speeds. Downstream customers include container shipping lines, tanker owners, bulk carrier and LNG carrier operators, ship repair and shipbuilding groups, naval and coast guard units, harbor craft operators, fishing vessel owners, yacht manufacturers, and yacht maintenance providers. Business opportunities are driven by policies such as the IMO Anti-Fouling Systems Convention, biofouling management guidelines, ship carbon intensity regulations, and restrictions on copper leaching and biocides in sensitive waters and by technological innovations, including low-friction self-polishing resins, copper-free anti-fouling agents, silicone-based fouling-release coatings, hydrogel surfaces, extended 90-month dry-docking cycles, and quantifiable fuel-saving solutions. Additionally, shifting consumer demands reflect a move by shipowners away from low-price procurement toward a comprehensive evaluation of total lifecycle costs, fuel savings, low-carbon compliance, long-term stationary anti-fouling performance, and application efficiency.

Marine antifouling coatings belong to a mature industry that nonetheless offers room for structural upgrades. Global demand in 2025 will not be driven by rapid growth in the total number of vessels, but rather by a combination of factors: dry-docking maintenance for the existing fleet, the need for energy efficiency and consumption reduction, the replacement of existing coatings with high-end antifouling systems, and tightening environmental regulations. Commercial shipping remains the largest market segment; container ships, oil tankers, bulk carriers, LNG carriers, and chemical tankers exhibit the strongest demand for long-lasting, highly reliable, and low-friction antifouling systems. Conventional low-end antifouling paints struggle to meet shipowners' requirements for fuel savings and consistent cruising speeds particularly given the increasing prevalence of slow steaming, extended port waiting times, and changing shipping routes. While the yacht and leisure craft market is smaller in volume, it commands higher unit prices and brand premiums, showing greater acceptance of copper-free, water-based, low-odor, and easy-to-apply products that comply with local water regulations. Regarding the competitive landscape, the global market remains dominated by multinational corporations such as AkzoNobel, PPG, Jotun, Hempel, Nippon Paint Marine, Chugoku Marine Paints, and KCC. These companies derive their competitive advantage not merely from formulations, but from extensive global networks of shipyards and repair yards, fleet data, classification society certifications, application services, and the ability to verify energy-saving performance. Over the next two to five years, Self-Polishing Copolymer (SPC) systems will retain their mainstream status, though the high-end market will increasingly shift toward low-friction, silicone-based

(fouling-release), copper-free, and low-VOC systems. Price competition will persist in the low-to-mid-range market, where regional enterprises survive primarily through local ship repair channels and cost advantages. Overall, while the marine antifouling coating industry is unlikely to experience explosive growth, the share of high-end products will continue to rise?driven by trends in shipping emission reductions, hull performance management, and the adoption of eco-friendly alternatives?with industry profits increasingly concentrated among companies possessing technical certifications, global service capabilities, and the ability to quantify energy savings.

This report studies the global Marine Anti-Fouling Coatings production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Marine Anti-Fouling Coatings 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 Marine Anti-Fouling Coatings that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Marine Anti-Fouling Coatings total production and demand, 2021-2032, (Kilotons)

Global Marine Anti-Fouling Coatings total production value, 2021-2032, (USD Million)

Global Marine Anti-Fouling Coatings production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Marine Anti-Fouling Coatings consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Marine Anti-Fouling Coatings domestic production, consumption, key domestic manufacturers and share

Global Marine Anti-Fouling Coatings production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Marine Anti-Fouling Coatings production by Technology System, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Marine Anti-Fouling Coatings production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Marine Anti-Fouling Coatings market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include AkzoNobel N.V. (NL), PPG Industries, Inc. (US),

Jotun A/S (NO), Hempel A/S (DK), Nippon Paint Marine Coatings (JP), Chugoku Marine Paints (JP), KCC Corporation (KR), Sherwin-Williams Company (US), Pettit Marine Paint (US), Boero Group (IT), 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 Marine Anti-Fouling Coatings market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilotons) and average price (USD/MT) by manufacturer, by Technology System, 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 Marine Anti-Fouling Coatings Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Marine Anti-Fouling Coatings Market, Segmentation by Technology System:

Self-Polishing Copolymer Type (SPC)

Controlled Depletion Polymer Type (CDP)

Self-Polishing System (SPC and CDP Composite)

Other

Global Marine Anti-Fouling Coatings Market, Segmentation by Fluorine Type:

Fluorinated Type

Non-Fluorinated Type

Global Marine Anti-Fouling Coatings Market, Segmentation by Antifouling Service Life:

?2 Years

2-5 Years

?5 Years

Global Marine Anti-Fouling Coatings Market, Segmentation by Application:

Bulk Carriers

Tankers

Container Ships

Passenger and Cruise Ships

Others

Companies Profiled:

AkzoNobel N.V. (NL)

PPG Industries, Inc. (US)

Jotun A/S (NO)

Hempel A/S (DK)

Nippon Paint Marine Coatings (JP)

Chugoku Marine Paints (JP)

KCC Corporation (KR)

Sherwin-Williams Company (US)

Pettit Marine Paint (US)

Boero Group (IT)

Carboline Company (US)

Teamac (GB)

TotalBoat (US)

I-Tech AB (SE)

Berlin Paint (TW)

Oceanmax International (NZ)

E Paint Company (US)

Nautix (FR)

Kansai Paint Co., Ltd. (JP)

Axalta Coating Systems (US)

Zhejiang Yutong New Materials (CN)

Xiamen Sunrui Ship Coating Co., Ltd. (CN)

Key Questions Answered:

1. How big is the global Marine Anti-Fouling Coatings market?
2. What is the demand of the global Marine Anti-Fouling Coatings market?
3. What is the year over year growth of the global Marine Anti-Fouling Coatings market?
4. What is the production and production value of the global Marine Anti-Fouling Coatings market?
5. Who are the key producers in the global Marine Anti-Fouling Coatings market?
6. What are the growth factors driving the market demand?

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