

Global Scratch Resistant Additives Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Scratch Resistant Additives market size was valued at US\$ 545 million in 2025 and is forecast to a readjusted size of US\$ 824 million by 2032 with a CAGR of 6.1% during review period.

Scratch-Resistant Additives are surface modification materials incorporated into plastics, coatings, inks, and overprint varnishes to enhance surface durability. Common ingredients include silicone compounds, waxes, amides, fluoropolymer additives, hard resins, and inorganic nanoparticles. These materials reduce the coefficient of friction, improve film hardness, or form wear-resistant surface layers, thereby minimizing whitening from scratches, abrasion damage, blocking, and gloss loss. They are widely used in automotive interiors, consumer electronics, home appliances, packaging, wood coatings, and industrial coating applications. The overall gross margin is approximately 42%.

Demand for scratch-resistant additives is primarily driven by increasing requirements for long-term surface appearance durability in automotive interiors, consumer electronics, appliance housings, and packaging materials. High-contact and high-friction environments often lead to scratch whitening, abrasion marks, gloss variation, and blocking issues. As a result, downstream customers increasingly prioritize solutions that offer low dosage requirements, low odor, low VOC emissions, low migration, and long-term performance stability. The growing adoption of waterborne coatings, UV-curable coatings, powder coatings, and premium plastic modification formulations is further expanding the application space for abrasion-resistant, anti-blocking, and low-friction additives.

Competition is shifting from simple slip enhancement toward formulation compatibility, surface feel, and regulatory compliance capabilities. Silicone-, amide-, and wax-based systems remain the dominant technology routes, while hard resins, inorganic nanoparticles, and hybrid additives are increasingly used to improve coating hardness and abrasion resistance. As regulatory scrutiny on fluorinated additives intensifies, alternative technologies such as polyethylene waxes, polyamide waxes, bio-based waxes, and reactive silicone systems are attracting greater attention. Suppliers with diversified product portfolios and strong application testing capabilities are more likely to secure positions within key customer supply chains.

Regional growth opportunities are concentrated in manufacturing upgrades across Asia and replacement demand in high-end applications within Europe and North America. China and Southeast Asia are benefiting from the expansion of new energy vehicles, consumer electronics, and packaging industries, resulting in more dynamic demand growth. In contrast, Europe and North America place greater emphasis on low odor, environmental compliance, and high-durability performance. Future industry growth is expected to be driven by premium automotive interiors, functional coatings, sustainable packaging solutions, and low-fluorine formulation alternatives. Suppliers will increasingly rely on customized formulation services to strengthen customer retention and differentiation.

This report is a detailed and comprehensive analysis for global Scratch Resistant Additives market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Scratch Resistant Additives market size and forecasts, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global Scratch Resistant Additives market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global Scratch Resistant Additives market size and forecasts, by Type and by

Application, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global Scratch Resistant Additives market shares of main players, shipments in revenue (\$ Million), sales quantity (kg), and ASP (US\$/kg), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries

- To assess the growth potential for Scratch Resistant Additives

- To forecast future growth in each product and end-use market

- To assess competitive factors affecting the marketplace

This report profiles key players in the global Scratch Resistant Additives market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Dow, BYK, Evonik, Clariant, Lubrizol, M?NZING, Micro Powders, Shamrock Technologies, DEUREX, Cargill, etc.

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

Market Segmentation

Scratch Resistant Additives market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

- Silicone Additives

- Wax Additives

Amide Additives

Fluoropolymer Additives

Inorganic Particle Additives

Reactive Resin Additives

Hybrid Additives

Other Additives

Market segment by Compatible System

Polyolefin Plastics

Engineering Plastics

Waterborne Coatings

Solventborne Coatings

Powder Coatings

Radiation-Curable Systems

Printing Inks

Other Systems

Market segment by Performance Focus

Scratch Whitening Reduction

Abrasion Resistance

Mar Resistance

Slip and COF Reduction

Gloss Retention

Anti-Blocking

Soft Touch

Stain Resistance

Market segment by Working Mechanism

Surface Migration

Non-Migrating Surface Modification

Low-Friction Lubrication

Hardness Reinforcement

Crosslinkable Surface Reaction

Particle Reinforcement

Film Property Modification

Other Mechanisms

Market segment by Application

Automotive Interiors

Consumer Electronics and Appliances

Packaging and Containers

Industrial and Powder Coatings

Wood and Architectural Coatings

Printing Inks and Overprint Varnishes

Major players covered

Dow

BYK

Evonik

Clariant

Lubrizol

M?NZING

Micro Powders

Shamrock Technologies

DEUREX

Cargill

Avient

Ampacet

Momentive

Wacker

BASF

Zhejiang Java Specialty Chemicals

Go Yen Chemical

Chengdu Silike Technology

Fine Organics

NOF

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Scratch Resistant Additives product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Scratch Resistant Additives, with price, sales quantity, revenue, and global market share of Scratch Resistant Additives from 2021 to 2026.

Chapter 3, the Scratch Resistant Additives competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Scratch Resistant Additives breakdown data are shown at the regional

level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Scratch Resistant Additives market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Scratch Resistant Additives.

Chapter 14 and 15, to describe Scratch Resistant Additives sales channel, distributors, customers, research findings and conclusion.

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