

Global Self-Polishing Copolymer (SPC) Antifouling Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Self-Polishing Copolymer (SPC) Antifouling market size is expected to reach \$ 1646 million by 2032, rising at a market growth of 5.0% CAGR during the forecast period (2026-2032).

Self-polishing copolymer (SPC) marine antifouling coatings are hydrolysable copolymer-based underwater hull topcoats designed to renew the coating surface through controlled hydrolysis, ion exchange or polishing in seawater. The binder system is commonly based on silyl acrylate, silyl methacrylate, copper or zinc acrylate, or hybrid hydrolysable polymers. These coatings are applied to merchant vessels, offshore vessels, workboats, fishing boats, yachts and submerged marine structures to reduce biofouling attachment, maintain hull smoothness and support fuel-efficiency and dry-docking interval management.

In 2025, global production of self-polishing copolymer (SPC) antifouling products reached 153,000 tons, with an average selling price of US\$7,507 per ton and total production capacity of approximately 200,000 tons. The industry gross margin for this product is estimated at around 35%–45%. In terms of cost structure, direct materials account for approximately 60%–70%, manufacturing overhead accounts for around 15%–25%, and labor costs account for about 5%–10%. The upstream supply chain includes self-polishing copolymer resins, silyl acrylate/metal acrylate resins, cuprous oxide and other antifouling active ingredients, solvents, additives, and related materials, while the downstream market is mainly the shipbuilding and marine industry.

Based on our research, SPC marine antifouling coatings should be treated as a finished marine coating category rather than a simple antifouling additive market. The competitive core of this industry lies in hydrolysable polymer design, polishing-rate

control, stable biocide release or surface renewal, hull roughness management, long-term seawater exposure performance and the ability to support shipowners through global newbuilding and dry-docking networks. Compared with conventional hard-matrix or simple ablative antifouling paints, SPC systems are better aligned with ocean-going vessels that require predictable polishing behavior, longer service intervals and lower hull friction.

From a supply perspective, the global SPC marine antifouling market is structurally concentrated. Leading multinational marine coatings groups and specialist Japanese, Korean and European suppliers dominate the high-end commercial vessel market because the product requires not only formulation know-how, but also shipyard approvals, fleet references, technical service capability and global docking support. Japanese suppliers have long-standing positions in hydrolysing SPC, silyl polymer and metal acrylate technologies; European and North American companies benefit from global fleet service coverage; Korean suppliers are closely linked to the Korean shipbuilding value chain. China has a dual structure, with international joint ventures and local producers both present. Local Chinese companies have demonstrated tin-free self-polishing product capability, but their high-end ocean-going fleet references and global service systems remain less transparent than those of the multinational leaders. Future growth is expected to come less from rapid vessel-count expansion and more from efficiency-driven coating upgrades, longer docking intervals, fleet decarbonization pressure and the gradual shift toward cleaner antifouling chemistries.

This report studies the global Self-Polishing Copolymer (SPC) Antifouling production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Self-Polishing Copolymer (SPC) Antifouling 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 Self-Polishing Copolymer (SPC) Antifouling that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Self-Polishing Copolymer (SPC) Antifouling total production and demand, 2021-2032, (Tons)

Global Self-Polishing Copolymer (SPC) Antifouling total production value, 2021-2032, (USD Million)

Global Self-Polishing Copolymer (SPC) Antifouling production by region & country,

production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Self-Polishing Copolymer (SPC) Antifouling consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Self-Polishing Copolymer (SPC) Antifouling domestic production, consumption, key domestic manufacturers and share

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Global Self-Polishing Copolymer (SPC) Antifouling production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Self-Polishing Copolymer (SPC) Antifouling production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Self-Polishing Copolymer (SPC) Antifouling 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 Nippon Paint, AkzoNobel, Jotun, Hempel, PPG Industries, KCC, Transocean Coatings, Pettit Paint, Nautix, Wilckens, 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 Self-Polishing Copolymer (SPC) Antifouling market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) by manufacturer, by Type, 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 Self-Polishing Copolymer (SPC) Antifouling Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Self-Polishing Copolymer (SPC) Antifouling Market, Segmentation by Type:

Silyl Acrylate SPC

Copper Acrylate SPC

Silyl Methacrylate SPC

Others

Global Self-Polishing Copolymer (SPC) Antifouling Market, Segmentation by Component:

Copper-based

Copper-free

Global Self-Polishing Copolymer (SPC) Antifouling Market, Segmentation by Solids Content:

Solids Content <60%

Solids Content >60%

Global Self-Polishing Copolymer (SPC) Antifouling Market, Segmentation by Application:

Merchant Vessels

Fishing Vessels

Workboats

Others

Companies Profiled:

Nippon Paint

AkzoNobel

Jotun

Hempel

PPG Industries

KCC

Transocean Coatings

Pettit Paint

Nautix

Wilckens

Zhoushan Hengtai Paint Industry

Jiangsu Lanling Chemical

Jiangsu Jinling Special Coatings

Guangdong Hosen New Materials

Key Questions Answered:

1. How big is the global Self-Polishing Copolymer (SPC) Antifouling market?
2. What is the demand of the global Self-Polishing Copolymer (SPC) Antifouling market?
3. What is the year over year growth of the global Self-Polishing Copolymer (SPC) Antifouling market?
4. What is the production and production value of the global Self-Polishing Copolymer (SPC) Antifouling market?
5. Who are the key producers in the global Self-Polishing Copolymer (SPC) Antifouling market?
6. What are the growth factors driving the market demand?

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