

China Low-VOC Paints, Coatings, and Adhesives Market Opportunity, Growth Drivers, Industry Trend Analysis, and Forecast 2025 - 2034

<https://marketpublishers.com/r/C48AB9C5DC7DEN.html>

Date: August 2025

Pages: 210

Price: US\$ 4,850.00 (Single User License)

ID: C48AB9C5DC7DEN

Abstracts

China Low-VOC Paints, Coatings, And Adhesives Market was valued at USD 10.7 billion in 2024 and is estimated to grow at a CAGR of 5.1% to reach USD 17.6 billion by 2034.

Across China, there's a clear push toward sustainable industrial practices, driving the demand for low-VOC solutions across key manufacturing and infrastructure sectors. The government has implemented strict regulations to address industrial pollution and improve urban air quality, especially in heavily populated and industrialized zones. This regulatory pressure is forcing manufacturers to move away from solvent-heavy formulations and adopt eco-friendlier alternatives such as waterborne and low-emission products. Rapid urban expansion and ongoing infrastructure projects are boosting the need for long-lasting, environmentally conscious coatings and adhesives in residential, commercial, and industrial construction. Meanwhile, automotive manufacturers are aligning with both domestic and international sustainability requirements, integrating high-performance low-VOC materials into their production without sacrificing efficiency. However, smaller local firms are struggling to keep up due to their limited access to advanced technologies, which are more readily available to global corporations. This technology gap gives multinational players an edge in expanding their market reach and penetrating key sectors more aggressively than regional competitors.

The structural adhesives segment generated USD 4.3 billion in 2024. This segment is rapidly gaining traction due to its critical role in industries requiring durable, high-strength bonding solutions that perform under extreme environmental or mechanical stress. These adhesives are essential in sectors such as transportation, heavy equipment, aerospace, and construction. With more stringent environmental rules in

place, there's been a marked shift toward low-VOC alternatives that still meet the rigorous demands of these applications. Newer formulations can bond a range of materials and maintaining integrity under heat, pressure, and vibration—essential attributes for safety-critical operations.

The water-based technology segment accounted for 44.7% share in 2024, reflecting its growing adoption for interior and structural applications. The move toward water-based solutions is accelerating, particularly in spaces where maintaining indoor air quality is a priority. These formulations not only meet environmental standards but also contribute to China's broader green building goals. Their use in structural components of commercial, institutional, and residential properties aligns with national directives to lower emissions in construction without compromising on performance or durability.

Eastern China Low-VOC Paints, Coatings, and Adhesives Market contributed USD 3.7 billion in 2024, emerging as the region with the highest concentration of development activity. The area benefits from mature industrial zones, strong logistics infrastructure, and access to international ports, which makes it an attractive base for both domestic and international manufacturers. Cities like Suzhou, Hangzhou, and Shanghai continue to lead innovation and output across a range of applications. Their growing influence has been critical in fast-tracking the adoption of low-VOC technologies across construction, transportation, and manufacturing. The presence of advanced production lines and R&D centers in this region is encouraging businesses to transition quickly to regulatory-compliant, high-performance solutions.

Leading players in China Low-VOC Paints, Coatings, and Adhesives Market include BASF SE, AkzoNobel N.V., PPG Industries Inc., Nippon Paint Holdings Co., Ltd., Sherwin-Williams Company, Xiangjiang Paint Group, Beijing Oriental Yuhong Waterproof Technology Co., Ltd., Zhejiang Tiannv Group Co., Ltd., Shanghai Huayi Fine Chemical Co., Ltd., and Guangdong Carpoly Chemical Co., Ltd. To strengthen their market presence in China's growing low-VOC segment, major companies are investing in local manufacturing, upgrading product portfolios, and partnering with domestic distributors and builders. Firms are focusing on R&D to develop formulations that meet both international standards and China's evolving environmental policies. Multinational brands are leveraging their global expertise to produce waterborne and structural solutions tailored for Chinese conditions. Mergers, acquisitions, and technology licensing deals with local enterprises are helping foreign brands expand their reach while addressing compliance challenges.

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10.10 Zhejiang Tiannv Group Co., Ltd.

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