

Automotive Refinish Coatings Market Report by Resin Type (Polyurethane, Alkyd, Acrylic, and Others), Product Type (Primer, Basecoat, Activator, Filler, Topcoat, and Others), Technology (Solvent-Borne, Water-Borne, UV-Cured), Vehicle Type (Passenger Cars, Commercial Vehicles, and Others), and Region 2024-2032

<https://marketpublishers.com/r/A78799694D32EN.html>

Date: March 2024

Pages: 143

Price: US\$ 3,899.00 (Single User License)

ID: A78799694D32EN

Abstracts

The global automotive refinish coatings market size reached US\$ 10.5 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 14.9 Billion by 2032, exhibiting a growth rate (CAGR) of 3.8% during 2024-2032. The steady growth in global vehicle ownership and usage, the development of eco-friendly and high-performance coatings, and the implementation of stringent environmental regulations and increasing awareness of sustainability represent some of the key factors driving the market.

Automotive refinish coatings, also known as automotive refinishing coatings, are specialized coatings used in the repair and refinishing of vehicles' exterior surfaces. These coatings are designed to restore the appearance of vehicles that have undergone damage due to accidents, scratches, weathering, or wear and tear. The primary purpose of automotive refinish coatings is to provide a protective layer that restores the vehicle's original finish, ensuring both aesthetic appeal and protection against environmental elements. Automotive refinish coatings are formulated to meet specific requirements, such as color matching to the vehicle's original color, durability to withstand exposure to UV radiation, resistance to environmental factors like moisture and chemicals, and ease of application. These coatings are available in various types, including basecoats, clearcoats, primers, and sealers, each serving a distinct purpose in the refinishing process.

Global Automotive Refinish Coatings Market

One of the primary drivers fueling the growth of the market is the ever-increasing demand for vehicle maintenance and restoration. As vehicle ownership continues to rise across the globe, there is a parallel surge in the need for repairing and refinishing coatings to restore vehicles to their original aesthetic and functional states. Additionally, the growth of the used car market is bolstering the demand for automotive refinish coatings, as consumers aim to enhance the visual appeal and value of pre-owned vehicles. Another significant driver is the rapid advancement of technology in the automotive refinish coatings sector. Manufacturers are innovating and developing advanced formulations that offer superior performance, durability, and environmental sustainability. Water-based coatings, low-VOC (volatile organic compounds) formulations, and environmentally friendly products are gaining traction due to stricter regulations and increasing consumer awareness of eco-conscious choices. Furthermore, the market is being influenced by the rise of customized vehicle aesthetics and personalized designs. Consumers are increasingly seeking unique appearances for their vehicles, ranging from vibrant colors to specialty finishes. This trend is driving the demand for a diverse range of refinish coatings that cater to individual preferences.

Automotive Refinish Coatings Market Trends/Drivers:

The increasing vehicle ownership and usage

As the number of vehicles on the road continues to rise, there is a corresponding increase in wear and tear. Over time, vehicles are exposed to various environmental factors such as sunlight, rain, snow, and road debris, which can lead to paint fading, chipping, and surface damage. This wear and tear necessitate regular maintenance and refinishing to restore the vehicles' appearance and protect them from further deterioration. As vehicle owners seek to maintain the aesthetic appeal and value of their investments, the demand for quality refinish coatings surges. Moreover, vehicle owners' desire for personalization and customization is another driving factor. As more individuals seek to differentiate their vehicles and express their personal style, there is a growing demand for unique paint finishes and specialty coatings. This trend extends beyond traditional automotive enthusiasts to a broader consumer base, including those who want to make a statement with their vehicles.

The development of eco-friendly and high-performance coatings

The introduction of eco-friendly coatings, formulated with reduced or no volatile organic

compounds (VOCs), aligns with increasing environmental awareness and stringent regulations. These coatings have significantly lower emissions of harmful substances, contributing to improved air quality and reduced environmental impact. Manufacturers and businesses that prioritize eco-friendly solutions position themselves as responsible and environmentally conscious, which resonates well with both regulatory bodies and consumers. This commitment to sustainability enhances the industry's reputation and promotes a positive image, fostering trust among customers and stakeholders. Moreover, eco-friendly coatings have evolved to offer performance levels on par with or even surpassing traditional solvent-based coatings. These coatings exhibit excellent adhesion, weather resistance, UV protection, and corrosion prevention. The combination of high performance and reduced environmental impact enhances the longevity of refinished surfaces, leading to greater customer satisfaction.

The rising trend of remote working

These regulations are encouraging manufacturers to invest in research and development to create coatings with lower levels of volatile organic compounds (VOCs) and hazardous air pollutants. This push for cleaner and more environmentally friendly formulations has led to the development of water-based and low-VOC coatings that have reduced emissions and less harmful impact on air quality. As a result, these innovative coatings not only comply with regulations but also address growing consumer concerns about the environmental footprint of products they use. Besides, stringent environmental regulations have spurred collaboration and partnerships between coating manufacturers, automotive companies, and regulatory bodies. This collaboration has fostered knowledge-sharing and the exchange of best practices in creating sustainable coatings.

Automotive Refinish Coatings Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global automotive refinish coatings market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on resin type, product type, technology, and vehicle type.

Breakup by Resin Type:

Automotive Refinish Coatings Market

Polyurethane

Alkyd

Acrylic
Others

Polyurethane represents the most popular resin type

The report has provided a detailed breakup and analysis of the market based on the resin type. This includes polyurethane, alkyd, acrylic, and others. According to the report, polyurethane represented the largest segment.

Automotive refinish coatings need to withstand various environmental stressors such as UV radiation, extreme temperatures, and harsh weather conditions. Polyurethane coatings exhibit remarkable resistance to these factors, ensuring that the refinished vehicles maintain their appearance and protection over an extended period. This durability reduces the need for frequent refinishing, providing cost savings and enhancing customer satisfaction. Additionally, polyurethane coatings offer a high level of versatility in terms of appearance and finish. They can be formulated to provide gloss, matte, or various textured finishes, allowing customization to match the desired aesthetics of different vehicles. This versatility is particularly crucial in the automotive industry, where individuality and unique designs are highly valued by consumers.

Breakup by Product Type:

Primer
Basecoat
Activator
Filler
Topcoat
Others

Basecoat is the most popular product type

A detailed breakup and analysis of the market based on the product type has also been provided in the report. This includes primer, basecoat, activator, filler, topcoat, and others. According to the report, basecoat accounted for the largest market share.

Basecoat formulations consist of colored pigments that deliver the desired hue to the vehicle's surface. This layer serves as the foundation for the final color and visual appeal of the vehicle. Automotive enthusiasts, as well as customers seeking personalized aesthetics, highly value the color options and finishes that Basecoat can

provide. This demand for diverse and appealing vehicle colors significantly drives the preference for Basecoat products. Moreover, Basecoat's popularity is attributed to its compatibility with advanced painting techniques such as two-stage painting systems.

Breakup by Technology:

Solvent-borne

Water-borne

UV-cured

Solvent-borne technology currently dominate the market

The report has provided a detailed breakup and analysis of the market based on the technology. This includes solvent-borne, water-borne, and UV-cured. According to the report, solvent-borne technology represented the largest segment.

Solvent-borne coatings offer exceptional durability and a high-quality finish. These coatings typically provide superior adhesion, corrosion resistance, and color retention compared to some of their alternatives. This level of performance is particularly important in the automotive refinish sector, where coatings need to withstand various environmental stresses, such as exposure to sunlight, weather conditions, and chemical pollutants. Moreover, solvent-borne coatings are known for their excellent flow and leveling properties, which contribute to a smooth and even finish. This quality is crucial in achieving the visually appealing, mirror-like finishes that automotive consumers expect.

Breakup by Vehicle Type:

Passenger Cars

Commercial Vehicles

Others

Passenger cars hold the largest market share

A detailed breakup and analysis of the market based on the vehicle type has also been provided in the report. This includes passenger cars and commercial vehicles. According to the report, passenger cars accounted for the largest market share.

The sheer volume of passenger cars on the road contributes to their dominant market

share. Passenger cars constitute a substantial portion of the overall automotive fleet, and they are subject to various external factors that can lead to wear and tear, such as accidents, weathering, and everyday usage. As a result, the need for refinishing and restoring the appearance of passenger cars is consistently high, creating a steady demand for automotive refinish coatings. Moreover, passenger car owners often prioritize the aesthetic appeal and overall condition of their vehicles. As personal vehicles, passenger cars are an extension of their owners' identity and lifestyle.

Breakup by Region:

Automotive Refinish Coatings Market

North America

United States

Canada

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

Asia Pacific exhibits a clear dominance in the market

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (United States, Canada); Asia-Pacific (China, Japan, India, South Korea, Australia, Indonesia, Others); Europe (Germany, France, United Kingdom, Italy, Spain, Russia, Others); Latin America (Brazil, Mexico, Others); and the Middle East and Africa. According to the report, Asia Pacific accounted for the largest market share.

The Asia Pacific region has witnessed rapid economic growth over the past few decades, leading to an increase in disposable incomes and urbanization. This economic expansion has resulted in higher vehicle ownership rates across the region, driving the demand for automotive refinish coatings. As more individuals and businesses own vehicles, the need for maintenance, repairs, and refinishing grows, bolstering the demand for coatings that restore and enhance the appearance of vehicles. This trend is particularly notable in countries like China, India, and Southeast Asian nations where burgeoning middle-class populations and industrial development have fueled the automotive sector.

Competitive Landscape:

The competitive landscape of the market is characterized by a blend of established multinational corporations, regional players, and ongoing innovations. Leading companies are heavily investing in research and development (R&D) to create innovative coating formulations. They are developing coatings with enhanced durability, faster drying times, improved color accuracy, and reduced environmental impact. They are also forming partnerships to ensure their coatings are recommended and used by OEMs and authorized repair facilities. Moreover, to strengthen their global presence, key players are expanding their operations into emerging markets with significant growth potential.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

3M Co.

Akzo Nobel N.V

Axalta Coating Systems

BASF SE

Clariant AG

DuPont de Nemours, Inc.

Kansai Paint Co.Ltd.

KCC Co., Ltd.
Nippon Paint Holdings Co., Ltd.
PPG Industries, Inc.,
The Sherwin-Williams Company

Recent Developments:

PPG Industries has introduced waterborne coatings with reduced VOC content, aligning with environmental regulations and consumer preferences. PPG has also developed advanced color-matching technologies that enhance accuracy and efficiency for body shops.

Axalta Coating Systems has introduced a digital color matching tool called Acquire Quantum EFX that accurately matches colors for automotive refinishing.

The Sherwin-Williams Company has been expanding its product portfolio with innovative coatings that offer enhanced durability and color accuracy. The company introduced the "Ultra 9K" waterborne basecoat system, which provides high-quality finishes while reducing environmental impact.

Key Questions Answered in This Report

1. What was the size of the global automotive refinish coatings market in 2023?
2. What is the expected growth rate of the global automotive refinish coatings market during 2024-2032?
3. What has been the impact of COVID-19 on the global automotive refinish coatings market?
4. What are the key factors driving the global automotive refinish coatings market?
5. What is the breakup of the global automotive refinish coatings market based on the resin type?
6. What is the breakup of the global automotive refinish coatings market based on the product type?
7. What is the breakup of the global automotive refinish coatings market based on the technology?
8. What is the breakup of the global automotive refinish coatings market based on the vehicle type?
9. What are the key regions in the global automotive refinish coatings market?
10. Who are the key players/companies in the global automotive refinish coatings market?

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