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Global Amine-based Curative Market Growth 2026-2032

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Abstracts

The global Amine-based Curative market size is predicted to grow from US$ 2279 million in 2025 to US$ 3187 million in 2032; it is expected to grow at a CAGR of 4.9% from 2026 to 2032.

Amine-based curative refers to a class of curing agents primarily composed of organic amine compounds containing reactive amino groups or their modified derivatives, which are used to induce crosslinking and curing reactions in epoxy resins. The basic curing mechanism involves the ring-opening addition reaction between the active hydrogen atoms of primary and secondary amine groups and the epoxy groups in epoxy resin molecules, gradually converting the originally linear or lightly crosslinked epoxy resin into a stable three-dimensional thermosetting network structure. This process provides the cured material with high mechanical strength, adhesion, chemical resistance, corrosion resistance, and heat resistance. Depending on chemical structure and modification method, Amine-based curative mainly includes aliphatic amines, cycloaliphatic amines, aromatic amines, polyetheramines, polyamides, amidoamines, phenalkamines, Mannich bases, as well as various amine adducts and modified polyamines. Different types vary significantly in reactivity, curing speed, low-temperature curing capability, pot life, viscosity, color, flexibility, and final heat resistance. Amine-based curative can generally cure epoxy resins at room temperature or relatively low temperatures, while molecular structure design and formulation modification can also enable performance under high-temperature, high-humidity, corrosion-resistant, low-odor, low-viscosity, and waterborne conditions. As a result, Amine-based curative is widely used in industrial and protective coatings, marine coatings, flooring materials, adhesives, composites, construction materials, wind turbine blades, electrical and electronic materials, automotive applications, and other fields, making it one of the most important and widely used categories of curing agents in

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epoxy resin systems.

Key Findings

Modified amine systems represent the principal commercial product group because formulators increasingly require controlled reactivity, lower emissions and application-specific performance

Paints and coatings constitute the largest downstream application, led by industrial protection, marine, flooring and corrosion-resistant systems

Solvent-free formulations are gaining importance alongside waterborne curing agents as coatings and construction customers tighten VOC and worker-exposure requirements

Global competition combines integrated chemical groups with specialist curing-agent manufacturers differentiated by formulation technology, raw-material integration and application support

China has developed a broad domestic manufacturing base while Europe, the United States and Japan retain strong positions in specialty and high-performance curing technologies

Market Trends

The Amine-based Curative industry is shifting from commodity unmodified amines toward increasingly engineered modified systems that provide a more favorable balance between pot life, curing speed, surface appearance, environmental profile and final performance. Product development is particularly active in alkylphenol-free and benzyl-alcohol-free modified amines, low-free-amine systems, low-viscosity curing agents, low-temperature curatives and waterborne polyamine or polyamide technologies. Olin already commercializes modified amine products capable of curing at temperatures below conventional ambient conditions, while its low-emission series is formulated without selected alkylphenols, benzyl alcohol or other volatile components. Evonik has continued this direction through newer ANCAMIDE® polyamide curing agents designed around nonylphenol-free formulations, bio-content, flexibility and rapid return to service, and in 2026 extended the ANCAMINE® range with an ultrafast modified polyamine designed for moisture-vapor-barrier flooring applications. Product differentiation is therefore moving beyond simple curing speed toward combinations of long working

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time, rapid thin-film cure, low-temperature activity, wet-substrate adhesion, carbamation resistance, color stability and regulatory compatibility. Waterborne curing technology is another important direction, particularly in flooring, wall coatings and civil-engineering applications, while wind-energy composites and structural adhesives continue to support demand for low-viscosity polyetheramine and cycloaliphatic-amine chemistries.

Market Dynamics

Drivers

Demand is supported by the broad expansion of epoxy systems in corrosion protection, industrial maintenance, marine infrastructure, civil engineering, flooring, adhesives, composites and electrical applications. Protective coatings are particularly important because amine curatives allow epoxy coatings to obtain adhesion, barrier properties, chemical resistance and relatively rapid curing under field conditions. Huntsman, for example, commercializes ARADUR® systems for anti-corrosion primers, flooring and civil-engineering coatings, including waterborne curing technology, while its broader portfolio covers aliphatic, cycloaliphatic, amidoamine, polyamide, phenalkamine, Mannich and aromatic amine technologies. Wind-energy composites, structural bonding, electrical insulation and construction repair provide additional demand because curing chemistry can be adjusted to control viscosity, processing window, toughness, heat resistance and cure temperature. BASF's Baxxodur® portfolio illustrates this cross-application demand, with amines used in epoxy formulations serving wind, electrical, composite, adhesive and flooring applications.

Restraints

The market is constrained by health, safety and environmental requirements associated with reactive amines, volatile diluents and certain historical formulation components. Primary and secondary amines can cause odor, skin sensitization and handling concerns, while conventional formulations may suffer from carbamation, blushing, yellowing or limited working time under humid or low-temperature conditions. Raw-material volatility involving ethyleneamines, cycloaliphatic diamines, fatty-acid derivatives, phenolic intermediates and bio-based feedstocks can also affect profitability and regional pricing. Formulators must additionally balance contradictory properties: faster cure generally reduces working time, lower viscosity can require formulation changes, and improved flexibility may reduce heat resistance or hardness. These constraints increase the importance of formulation expertise and make direct comparison of products on price alone increasingly inappropriate.

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Opportunities

The strongest opportunities are emerging in low-emission modified amines, waterborne epoxy curing agents, low-temperature systems, rapid-return-to-service flooring products, high-durability marine and protective coatings, wind-blade composites and specialty structural adhesives. Increasing environmental requirements create room for products formulated without nonylphenol, benzyl alcohol or selected volatile components, while renewable raw materials provide differentiation in polyamide and phenalkamine technologies. Cardolite's modified phenalkamine chemistry demonstrates the ability to combine room-temperature and low-temperature curing with specialized corrosion-protection characteristics. In China, continued localization of high-performance cycloaliphatic amines, polyetheramine curing systems and formulated modified amines creates opportunities for domestic producers to replace imported grades while moving from price-based competition toward technical-service and performance-based competition.

Challenges

The principal industry challenge is maintaining consistent curing performance across highly variable application environments while simultaneously meeting increasingly stringent EHS requirements. Construction and marine coatings can encounter low temperature, high humidity, wet concrete, salt contamination and variable film thickness, whereas composites and electronics require tightly controlled thermal and mechanical properties. Producers therefore need extensive formulation libraries, application laboratories and customer technical support in addition to chemical manufacturing capability. Competition is further complicated by the coexistence of vertically integrated groups with captive upstream amine production and specialist formulators that can respond more rapidly to niche requirements. As regulations tighten, reformulation costs, raw-material qualification and customer re-approval cycles may become increasingly important competitive barriers.

Industry Chain Analysis

The upstream chain consists primarily of basic petrochemical and oleochemical feedstocks used to manufacture ethyleneamines, polyetheramines, isophorone-based diamines and other cycloaliphatic amines, aromatic diamines, fatty-acid-derived polyamides, phenolic intermediates and cardanol-based phenalkamine raw materials. Midstream producers either sell relatively unmodified amines directly as curing agents or further conduct adduction, amidation, Mannich reaction, polyamide synthesis and

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formulation to adjust equivalent weight, viscosity, reactivity and application performance. Integrated manufacturers benefit from raw-material availability and scale, while specialist curing-agent companies compete through formulation know-how and application development. BASF explicitly highlights backward integration of many raw materials in its Baxxodur® amine portfolio. Downstream value creation takes place mainly through coatings, adhesives, composite matrices, construction formulations, electrical encapsulation and other two-component epoxy systems, where curative selection directly affects processing behavior and the final mechanical, chemical and thermal properties.

Segment Insights

By Type, Modified Amine represents the more strategically important commercial segment because modification allows suppliers to solve practical limitations of commodity amines, including excessive reactivity, short pot life, high volatility, blush, poor wet-surface tolerance and limited flexibility. Modified products encompass amine adducts, formulated polyamines, modified cycloaliphatic amines, Mannich bases, phenalkamines and modified polyamide or amidoamine technologies. Unmodified Amine remains important where low viscosity, high reactivity, predictable stoichiometry and cost efficiency are prioritized, particularly as a building block for downstream formulations. A complementary chemical-structure view is useful for industry analysis because aliphatic, cycloaliphatic, aromatic, polyetheramine, polyamide/amidoamine and phenalkamine systems exhibit materially different processing and cured-property profiles.

By Curing Temperature, ambient-temperature systems account for the broadest application base because coatings, flooring, adhesives and construction formulations are frequently cured without ovens. Low-temperature curing is a higher-value specialty area for marine maintenance, winter construction, refrigerated environments and rapid field repair, while elevated-temperature systems are more relevant to high-performance composites, electrical laminates and applications requiring higher glass-transition temperature. By Product Form, solvent-free products are increasingly important in flooring, construction and high-solids protective coatings, waterborne systems are expanding where low VOC and easier cleanup are priorities, and solvent-based systems remain relevant in specific industrial-coating formulations requiring established application windows and film formation.

Downstream Market Opportunities

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Paints and Coatings remain the principal opportunity because curing-agent chemistry directly controls early water resistance, corrosion protection, adhesion, recoat interval and application temperature. Within this field, marine coatings, heavy-duty protective coatings, industrial maintenance and flooring offer particularly strong opportunities for differentiated modified amines. Adhesives provide another attractive market as transportation, wind-energy, construction and general industrial bonding increasingly require high-strength epoxy systems with carefully controlled open time and toughness. Composite applications favor low-viscosity and high-performance amines for wind blades, sporting goods and industrial laminates, while electrical and electronics applications create demand for systems offering dielectric performance, thermal resistance and dimensional stability.

Regional Insights

Asia Pacific forms the largest manufacturing and consumption cluster for Amine-based Curative, supported by China's large epoxy resin, coatings, construction, electronics, wind-power and composite-material industries. China has developed an increasingly complete local supplier base ranging from integrated chemical companies to specialist modified-amine manufacturers, with competition strongest in polyamide, modified aliphatic amine, cycloaliphatic amine, polyetheramine-derived and formulated curing-agent products. Japan retains strength in specialty epoxy chemistry and electronics-oriented systems, while South Korea participates through large integrated epoxy suppliers such as KUKDO.

North America and Europe remain important high-value markets characterized by stringent EHS requirements, extensive industrial-maintenance and infrastructure demand and strong positions held by global specialty-chemical suppliers. Regulatory pressure and customer sustainability requirements are accelerating the transition toward lower-emission, alkylphenol-free and waterborne products. Europe also maintains significant specialty-amines and formulation technology, while North American demand is supported by infrastructure repair, protective coatings, flooring, adhesives and composites.

Competitive Landscape Analysis

Competition is fragmented across several strategic groups rather than being controlled by a single type of manufacturer. Global integrated suppliers such as Olin, Huntsman, BASF, Evonik, Westlake and Mitsubishi Chemical combine broad chemical portfolios, multinational production or distribution networks and extensive application support.

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Olin's D.E.H.® range includes amine and modified polyamidoamine curing agents, while Huntsman's ARADUR® portfolio spans aliphatic, cycloaliphatic, aromatic, polyamide/amidoamine and phenalkamine/Mannich technologies. BASF differentiates through upstream amine integration and Baxxodur®, while Evonik maintains a specialized position through ANCAMINE®, ANCAMIDE® and related curing technologies. Specialist competitors such as Cardolite, Polynt/Reichhold, Atul, Cargill and Incorez compete through phenalkamine, polyamide, modified amine and waterborne technologies. The enhanced enterprise pool should additionally recognize Asian suppliers including KUKDO, DIC, Johnson Fine Chemical, HENGSITE, Zhejiang Wansheng, Wanhua Chemical Group, Yueyang Zhongzhan Technology, Fujian Zhongde Energy, Guangzhou Rich Chemical and Yun Teh Industrial.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Amine-based Curative Industry Forecast” looks at past sales and reviews total world Amine-based Curative sales in 2025, providing a comprehensive analysis by region and market sector of projected Amine-based Curative sales for 2026 through 2032. With Amine-based Curative sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Amine-based Curative industry.

This Insight Report provides a comprehensive analysis of the global Amine-based Curative landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Amine-based Curative portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Amine-based Curative market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Amine-based Curative and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Amine-based Curative.

This report presents a comprehensive overview, market shares, and growth opportunities of Amine-based Curative market by product type, application, key manufacturers and key regions and countries.

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Market Segmentation

Segmentation by Type:

Modified Amine

Unmodified Amine

Segmentation by Curing Temperature:

Low-temperature Curing

Ambient-temperature Curing

Elevated-temperature Curing

Segmentation by Product Form:

Solvent-free

Solvent-based

Waterborne

Others

Segmentation by Application:

Paints and Coatings

Adhesives

Composites

Electrical and Electronics

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Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

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Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Olin Corporation

Huntsman

KUKDO

Polynt(Reichhold)

Atul

Aditya Birla Group

BASF

Evonik

Cardolite

Mitsubishi Chemical

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Cargill

Johnson Fine Chemical

HENGSITE Company

ZheJiang Wansheng

Wanhua Chemical Group

Yueyang Zhongzhan Technology

Fujian Zhongde Energy

Incorez

Guangzhou Rich Chemical

Yun Teh Industrial

Westlake

DIC Corporation

Key Questions Addressed in this Report

What is the 10-year outlook for the global Amine-based Curative market?

What factors are driving Amine-based Curative market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Amine-based Curative market opportunities vary by end market size?

How does Amine-based Curative break out by Type, by Application?

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