

# **Coil Coatings Market Assessment, By Resin Type [Polyester, Plastisol, Polyurethanes, Silicone Modified Polyester, Polyvinylidene fluorides, Fluoropolymers, Others], By Substrate [Steel, Aluminium, Others], By Application [Primer, Basecoat, Topcoat, Others], By End-user [Building & Construction, Automotive, Electrical Appliance, Furniture, Others], By Region, Opportunities, and Forecast, 2016-2030F**

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## **Abstracts**

Global Coil Coatings Market size was valued at USD 3.82 billion in 2022, which is expected to grow to USD 5.56 billion in 2030 with a CAGR of 4.8% during the forecast period between 2023 and 2030. The coil coating market is primarily driven by the robust growth of the construction and infrastructure sectors, particularly in emerging economies such as India, China, and Brazil. Strong construction sector development fuels the demand for coil coatings, providing protective, aesthetic, and functional benefits to metal surfaces used in buildings and constructions. Additionally, the increasing emphasis on energy efficiency and sustainability drives the adoption of coil coatings, especially those that contribute to cool roofing and energy conservation in roofing systems. Regulatory compliance and the need for corrosion protection in the construction and automotive industries further spur the demand for high-quality coil coatings.

Coil coatings are extensively used for vehicle exteriors and components to enhance aesthetics, durability, and corrosion resistance. As the automotive sector grows with increasing production and sales, the demand for high-quality coil coatings is expected to rise accordingly. Moreover, the industrial and manufacturing sectors utilize coil coatings

for various purposes such as durability in machinery, equipment, storage tanks, and more. Rising demand for electrical appliance contribute to the increased need for protective and functional coatings, further raising coil coating demand.

### Huge Construction Projects to Drive the Demand for Coil Coating

Coil coatings protect and enhance metal surfaces used in residential, commercial, and industrial buildings. Coil Coatings provide essential features like corrosion resistance, durability, and aesthetic appeal. Modern architectural trends often integrate metal-coated surfaces, further driving the need for coil coatings to meet sustainability and durability requirements. Compliance with sustainability norms, and energy efficiency mandates are additional factors contributing to the growing demand for coil coatings in the construction industry.

For instance, the Magnolia Mixed-Use Complex in Texas is a project with an estimated value of USD 1,000 million and is anticipated to reach completion in the first quarter of 2025. Saudi Arabia has been actively undertaking numerous significant infrastructure endeavors. These encompass major initiatives such as NEOM, the Red Sea Project, Qiddiya, King Salman Energy Park, Jeddah Tower, and Riyadh Metro. Additionally, the Minamikojiwa 6-Chome District Type One Urban Redevelopment project in Tokyo, Japan, is on track for completion in 2026. These Large-scale construction projects around the globe will drive the demand for Coil Coating due to the increased requirement for efficient roofing and protection for metal surface.

### Strong Performance from automotive sector to raise the Usage of Coil Coating

The automotive industry stands as a substantial consumer of coil coatings as it is utilized for diverse applications encompassing vehicle exteriors, parts, and accessories. With the steady rise in global automobile production and sales, the demand for high quality coatings has surged correspondingly. Coil coatings play a pivotal role in enhancing the aesthetic appeal of vehicles, ensuring durability, corrosion resistance, and longevity of automotive components. As automakers prioritize the use of high-quality coatings to meet consumer expectations for visually appealing and durable vehicles, the demand for advanced coil coatings is anticipated to further escalate in the automotive sector.

For instance, the Society of Indian Automobile Manufacturers reported notable growth in various segments. Specifically, sales of passenger cars increased from 1,467,039 to 1,747,376 units, utility vehicles saw a surge from 1,489,219 to 2,003,718 units, and van

sales rose from 113,265 to 139,020 units in comparison to the fiscal year of 2022.

### Stringent Environmental Regulations and Sustainability Initiatives to Increase Coil Coating Demand

Coil coated metals compared to post-painted metals have demonstrated a notable reduction in environmental impact through reduced water consumption and recycling. One of the key areas where coil coated metals exhibit a positive environmental footprint is in the reduced water consumption compared to post coating metals. The process of pre-painting typically has low energy and labour cost, reduced environmental impact and decreased water usage compared to the traditional post-painting methods.

For instance, According to European Coil Coating Association, the impact of coil coated aluminum and steel on human are just 24% and 25% of the impact of post painted metals. Since coil coating offers sustainability and abets safety standards compared to post painted metals, the consumer sentiments towards coil coating improved.

### Impact of COVID-19

The COVID-19 pandemic significantly disrupted global supply chains, impacting the production and distribution of coil coatings and their raw materials. Delays and shortages were witnessed in the supply chain for coil coating and substrates such as steel and aluminium primarily due to factory closures and transportation restrictions. The pandemic-induced lockdowns and economic slowdowns led to a notable decrease in demand across various sectors such as construction and automotive, which weakened the demand for coil coatings during the pandemic. Finally, the coil coating market faced price fluctuations during the pandemic, driven by supply and demand dynamics disruptions.

### Impact of Russia-Ukraine War

The Russia-Ukraine conflict had a notable impact on the coil coating market, particularly because Russia is a major supplier of aluminium substrate to various countries, especially in Europe. The conflict prompted several European nations to enforce import bans on Russian products, including aluminium. This restriction significantly tightened the supply of coil coated metals in these markets. Consequently, production costs for coil coating increased in these countries, reducing procurement activities. The war reduced construction and automotive activities in the affected region further weakening the demand for coil coatings.

## Key Players Landscape and Outlook

Prominent companies within the coil coating sector are actively engaged in strategic acquisitions to enhance their portfolio capabilities to effectively meet the growing demand from both the automotive and construction industries. These industry leaders recognize the need to fortify their offerings in response to the escalating market requirements.

For instance, BlueScope Steel Limited has formally committed to acquiring Cornerstone Building Brands Inc.'s Coil Coatings business in a definitive agreement, valued at USD 500 million in June 2022.

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