

Pigments Market Assessment, By Type [Organic-Azo Pigments, Polycyclic Pigments, Others; Inorganic-Titanium Dioxide, Carbon & Vegetable Black, Mixed Metal Oxide, Others; Speciality-Metallic, Pearlescent, Others], By Industry [Paint & Coatings, Packaging, Plastics, Cosmetics, Textile, Printing Inks, Others], By Form [Liquid/Paste, Powder], By Region, Opportunities, and Forecast, 2018-2032F

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Abstracts

The Global Pigments Market was valued at USD 35.99 billion in 2024 and will grow to USD 51.58 billion in 2032. The market is projected to grow at a CAGR of 4.6% during the forecast period between 2025 and 2032. The standards for characteristics and testing of pigments were developed by the International Organization for Standardization (ISO). The Colour Index International (CII) has identified each pigment according to its chemical composition which is a published standard index, and more than 27,000 pigments are indexed in this CII schema.

The fundamental function of pigments is to add colour to materials. Pigments are stable at normal temperatures and have a high tinting strength, so only a tiny amount is required to show the colour when put on objects or mixed with a carrier. Fugitive pigments are pigments that fade or blacken with time or with prolonged contact to light. The hue, saturation, and other qualities of a pigment are affected by other substances in the product, such as binders or fillers. A colour of paint, for example, will appear differently depending on the composition of the mixture.

Rise in Construction Sector

Pigments are used for varied purposes across many industries. For instance, in the construction industry, architectural and decorative coatings largely consume pigments in the production process. Thus, rising construction and infrastructure activities are major drivers for growth of pigment market. Similarly, producers offer organic and inorganic pigments for the paint and coatings industry based on colour and composition requirements. The addition of pigments to paints successfully improves the glossy wall surface that customers desire.

Increasing Home Ownership

Due to increasing home ownership and rising disposable incomes, the market's demand is significantly growing as new homeowners are investing towards aesthetics, upgrades, and renovations. According to the estimates of the Federal Reserve Bank of Minneapolis, approximately two-third of the United States households own their home. Pigments play a crucial role in providing vibrant and long-lasting colors, enhancing the aesthetic appeal of houses. Additionally, due to the growing popularity of personalized home decor and DIY projects the requirement for bright paints with high quality finishes along with other decorative materials and coatings is rapidly increasing. Thus, bolstering the demand for pigments and providing lucrative growth opportunities for the market.

Strategic Acquisitions Fuel Market Expansion

In the competitive pigments industry, strategic acquisitions have become a pivotal growth driver, enabling companies to expand their product portfolios, enhance market reach, and achieve economies of scale. Such mergers and acquisitions facilitate the consolidation of expertise and resources, fostering innovation and strengthening market positions. A notable instance illustrating this trend occurred in July 2024, when Merck KGaA agreed to sell its global Surface Solutions business unit to Global New Material International Holdings Ltd. (GNMI) for approximately USD 725 million. This transaction allows Merck to concentrate on high-tech applications in electronics, particularly in advancing next-generation chip development, while GNMI enhances its competitiveness in the pigments industry by integrating Merck's expertise and product offerings. The deal includes the transfer of approximately 1,200 employees and production facilities across Germany, Japan, and the USA, indicating a significant consolidation in the pigments sector. Such strategic moves are reshaping the market landscape, promoting growth through expanded capabilities and diversified product lines.

Asia Pacific To Lead The Pigment Market

Due to the rising residential and commercial construction activities in China and India, Asia-Pacific dominates the global pigments market. For instance, the Chinese government has been increasing the amount of money spent on building affordable housing facilities. Similarly, the Government of India has made the infrastructure sector key focus for its economic growth.

Impact of COVID-19 on Global Pigments Market

The global spread of the coronavirus affected several countries, leading to a scarcity of raw materials and finished products, which resulted in disruption in the value chain. There was a significant dip in construction activity as a result of the unavailability of labour and hence substantial decline in demand for pigments base products. Additionally, labour and supply constraints led to reduction in the pigment's companies' production operations. However, due to safety concerns, the trend of safe packaging fuelled the growth in packaging industry. Dyes and pigments are crucial components used in the production of printing inks used on packaging products. Thus, despite the pandemic, the packaging sector assisting in global pigments market recovery.

Impact of Russia-Ukraine War on Global Pigments Market

The Ukraine-Russian war had an adverse impact on the global supply chains and import export trade for pigments. The restricted transportation of different commodities especially in Europe in and around war zone had adversely impacted the trade in Global and European pigments market. Raw material prices, which have already been rising as a result of supply chain challenges, are anticipated to be increase further due to rising oil and energy costs as a result of the war.

Key Players Landscape and Outlook

Wide range of companies are operating in the manufacturing of pigments globally. BASF SE is a leading manufacturer and holds the dominant share in the global pigments market. The market consists of key players involving Clariant International Ltd., The Shepherd Color Company and Tata Pigments Ltd.

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