

Automotive Refinish Coatings Market by Layer (Clearcoat, Basecoat, Primer), Resin Type (Polyurethane, Epoxy, Acrylic, Alkyd), Vehicle Type (Passenger Cars, Commercial Vehicles), and Region - Global Forecast to 2030

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Abstracts

The increasing maturity and development of automotive aftermarket infrastructure worldwide have set favorable platforms for the expansion of automotive refinish coatings. With everything from tiered dealership service centers and authorized collision networks to independent garages and franchised repair chains, the appeal of an ever-accelerating number of standardized, quality-controlled repair outlets is irresistible when it comes to reaching the furthest corners of the product distribution landscape and achieving more brand exposure. More specifically, the facilities utilize methods such as sophisticated inventory systems, digital procurement platforms, and customer relationship management tools to support volume purchasing and consistent coating consumption. The aftermarket is further defined by the rise of repair aggregators, such as online sites that link vehicle owners with quality workshops, which may recommend refinish brands as part of their service package. Therefore, the robust aftermarket ecosystem acts as a demand stabilizer, supporting both volume and value growth across geographies.

The primer segment was the third-largest segment, in terms of value, of the global automotive refinish coatings market.

The primer segment was the third-largest segment in the global market for automotive refinish coatings in 2024. This robust positioning stems from the role played by the primer as an essential means of corrosion protection. Refinish processes often entail fixing scratched, dented, or rusted panels where the metal substrate is exposed to

environmental factors. In the absence of proper sealing of the surface, these surfaces are at risk of moisture, salt, and chemical exposure and consequently suffer from corrosion and structural deterioration. Primers serve as a shield, protecting against oxidation and enhancing the overall durability of the vehicle's body. In areas with high humidity, intensive rain, or salty roadways, corrosion threats are very high, and the use of anti-corrosive primers is of particular concern. Car repair shops place emphasis on anti-corrosive primers to preserve vehicle integrity and adhere to OEM repair standards.

The other resin types segment is projected to be the third-fastest-growing segment in the automotive refinish coatings market during the forecast period.

The other resin types segment is projected to be the third-fastest-growing segment in the automotive refinish coatings market. Expansion in other types of resins, including nitrocellulose and polyester, is driven by increased demand for high-speed-drying types of formulations used in low-complexity repair jobs in automobiles. Nitrocellulose resins are particularly used because they have very fast drying capabilities and are suitable for quick refinishing processes, minor repairs, or transient touch-ups where curing speed takes precedence over long-term performance. In city areas and high-traffic service centers, owners of vehicles tend to request speedy turnaround for minor repairs, scratches, or localized repaint. Such resins fulfill this requirement well by allowing technicians to finish multiple tasks within short periods. Furthermore, they are particularly favored among small-scale units and mobile repair units with no sophisticated curing facilities but a need for consistent outcomes within short periods.

The passenger cars segment led the automotive refinish coatings market, in terms of value, in 2024.

The passenger cars segment led the automotive refinish coatings market, in terms of value, in 2024. The passenger cars segment ruled the automotive refinish coatings market in 2024, a trend brought by the continued urbanization and the resulting growth in vehicle ownership. Urbanization has brought about the swift expansion of cities, increasing vehicle presence in urban areas, where daily travel and urban road congestion place vehicles at higher risk of surface damage. Passenger vehicles are especially hit given their large-scale adoption and constant exposure to congested parking lots, rough road surfaces, and heavy pedestrian traffic. As a reaction to this city migration, automotive aftermarkets for ecosystems like refinish shops and repair shops are growing in quantity and service capacity. Increased availability of such infrastructure, particularly in emerging economies, is reducing the cost and speed of refinishing services for consumers. Concurrently, urban-focused product developments

by coating manufacturers include low-VOC formulations, fast-drying coatings, and miniature application systems that fit in small working areas.

“Europe accounted for the third-largest share in the automotive refinish coatings market in terms of value.”

Europe accounted for the third-largest share in the automotive refinish coatings market, in terms of value, in 2024. The driving factor is the strict environmental regulations put in place by the European Union and governments of individual countries, specifically those addressing air quality, control of hazardous substances, and industrial emissions. Regulations like REACH (Registration, Evaluation, Authorisation and Restriction of Chemicals) and directives against volatile organic compound (VOC) emissions are driving a region-wide transformation toward sustainable coating formulations. This involves the widespread use of waterborne coatings, high-solid content systems, and low-VOC clearcoats. Automotive refinish coating manufacturers across Europe are investing more in sustainable innovations to meet compliance requirements while holding performance levels. Body shops and collision centers, on their part, are also upgrading their operations to include clean technologies, typically subsidized and backed by training programs from local authorities.

By Company Type: Tier 1 - 55%, Tier 2 - 25%, and Tier 3 - 20%

By Designation: Directors - 50%, Managers - 30%, and Others - 20%

By Region: North America - 40%, Europe - 35%, Asia Pacific - 20%, and the Rest of the World - 5%

The key players profiled in the report include Axalta Coating Systems LLC (US), PPG Industries, Inc. (US), BASF SE (Germany), Akzo Nobel N.V. (Netherlands), The Sherwin-Williams (US), Kansai Paint Co., Ltd. (Japan), Nippon Paint Holdings Co., Ltd. (Japan), KCC Corporation (China), and TOA Performance Coating Corporation Co., Ltd. (Thailand).

Research Coverage

This report segments the market for automotive refinish coatings based on layer type, resin type, vehicle type, and region, and provides estimations of value (USD million) for the overall market size across various regions. It has also conducted a detailed analysis

of key industry players to provide insights into their business overviews, services, and key strategies associated with the market for automotive refinish coatings.

Reasons to Buy this Report

This research report is focused on various levels of analysis — industry analysis (industry trends), market share analysis of top players, and company profiles, which together provide an overall view of the competitive landscape, emerging and high-growth segments of the automotive refinish coatings market, high-growth regions, and market drivers, restraints, and opportunities.

The report provides insights into the following points:

Market Penetration: Comprehensive information on automotive refinish coatings offered by top players in the global market

Analysis of key drivers (expanding automotive aftermarket services, growth in road accidents and collisions, technological advancements in coatings, and rising insurance penetration and claims processing) restraints (shift toward painless repair techniques and toxicity and health concerns) opportunities (adoption of eco-friendly coatings and expansion into emerging markets), and challenges (stringent environmental regulations) influencing the growth of the automotive refinish coatings market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the automotive refinish coatings market.

Market Development: Comprehensive information about lucrative emerging markets — the report analyzes the markets for automotive refinish coatings across regions.

Market Diversification: Exhaustive information about new products, untapped regions, and recent developments in the global automotive refinish coatings market.

Competitive Assessment: In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the automotive refinish coatings market.

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