

Coated Ducts Market by Coating Type (ETFE, ECTFE, Others), Type (Powder, Liquid), End-use Industry (Semiconductor Manufacturing, Pharmaceutical, Oil & Gas, Others), & Region - Global Forecast to 2030

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Abstracts

The coated ducts market is projected to reach USD 666.5 million by 2030 from USD 527.6 million in 2025, at a CAGR of 4.8%. The growing need for cleanroom environments, particularly in semiconductor manufacturing, is driving significant demand for the coated ducts market. Cleanrooms used in semiconductor manufacturing must maintain extremely low particle counts—typically ISO Class 5 or lower—while also ensuring uniform temperature and humidity levels. Any contamination can lead to defective chips. Coated ducts play a crucial role by facilitating air and exhaust transport while also providing corrosion resistance and ease of cleaning. These features are essential for achieving optimal cleanroom performance. As semiconductor processes become more advanced and sensitive, the need for durable, high-performance ducting solutions that resist contamination will continue to increase the demand for coated ducts.

“Based on the end-use industry, semiconductor manufacturing accounted for the largest market share in terms of value.”

The semiconductor industry is projected to be the largest end-use market for coated ducts in terms of value during the forecast period. This industry has strict requirements for contamination control, chemical resistance, and durability, necessitating the use of high-performance coated ducts, particularly those lined with ETFE and ECTFE. Although duct systems represent only a small portion of the overall semiconductor environment, it is crucial to maintain their cleanliness to comply with cleanroom standards. This cleanliness is essential for controlling environmental factors and

preventing contamination from components within the system.

Additionally, the demand for high-performance coated ducts is increasing due to the rapid global expansion of semiconductor production, especially in the Asia Pacific and North American regions. As this expansion continues and chip performance improves through advanced designs, the need for reliable, corrosion-resistant duct systems that are easy to clean becomes more critical. This trend further reinforces the semiconductor industry's position as the largest end-user in the coated ducts market.

“Based on coating type, ECTFE coatings account for the second-largest share in terms of value.”

In terms of value, ECTFE coatings account for the second-largest share of the coated ducts market during the forecast period. This is primarily due to ECTFE's excellent chemical resistance, durability, and performance under extreme conditions. It has established itself as the preferred coating for demanding applications in the semiconductor, pharmaceutical, and chemical processing industries. ECTFE-coated ducts are particularly popular in aggressive chemical environments that require strict purity standards. These coatings were developed and refined to endure such conditions, ensuring long-term performance and minimizing maintenance costs.

The market for ECTFE-coated air ducts is expected to grow steadily, driven by increasing capital investments in high-tech manufacturing and the need for air handling systems that can withstand corrosive environments and maintain high levels of purity. Industrial expansion in regions like the Asia Pacific is further boosting the demand for ECTFE solutions, positioning it for increased market strength.

“Based on region, Asia Pacific accounts for the largest share and is the fastest-growing region in the coated ducts market in terms of value.”

The Asia Pacific region leads the coated ducts market in terms of both market share and growth rate, primarily due to several key factors. Rapid urbanization, robust infrastructure development, and a thriving manufacturing sector in major economies such as China, India, and various Southeast Asian nations contribute significantly to this growth. Additionally, ongoing issues with poor air quality in many developing countries in Asia have led to an increased demand for effective air filtration and ventilation solutions. This, in turn, raises the need for coated ducts known for their durability and low maintenance requirements. The presence of major industry players and extensive distribution networks further strengthens Asia Pacific's position in the global market. As

a result, the region not only holds the largest market share but is also anticipated to experience the highest growth rate in the coated ducts industry throughout the forecast period.

In the process of determining and verifying the market size for several segments and subsegments identified through secondary research, extensive primary interviews were conducted. A breakdown of the profiles of the primary interviewees is as follows:

By Company Type: Tier 1 - 40%, Tier 2 - 30%, and Tier 3 - 30%

By Designation: Directors - 35%, Managers - 25%, and Others - 40%

By Region: North America - 22%, Europe - 22%, Asia Pacific - 45%, and the RoW - 11%

The key players in this market are Kenyon Pte Ltd. (Singapore), Exyte Group (Germany), Acesian Partners Limited (Singapore), Sigma Roto Lining Pvt. Ltd. (India), Viron International (US), Dongsheng (Zhangjiagang) Environmental Protection Technology Co., Ltd. (China), Spiral Manufacturing Co., Inc (US), ChenFull International Co., Ltd (Taiwan), Junhao Co., Ltd (China), Epiroc Mining India Limited (India), LBF Technik (Germany), SEBO MEC (South Korea), Shanghai Shengjian Technology Co., Ltd. (China), Uangyih-Tech Industrial Co., Ltd (Taiwan), and ATS Duct Inc. (US).

Research Coverage

This report segments the coated ducts market based on coating type, type, end-use industry, and region, and provides estimations for the overall value of the market across various regions. A detailed analysis of key industry players has been conducted to provide insights into their business overviews, products and services, key strategies, product launches, expansions, and mergers and acquisitions associated with the coated ducts market.

Research Coverage

This research report focuses on various levels of analysis, including industry analysis (industry trends), market ranking analysis of top players, and company profiles, which together provide an overall view of the competitive landscape, emerging and high-growth segments of the coated ducts market, high-growth regions, and market drivers,

restraints, opportunities, and challenges.

The report provides insights on the following pointers:

Analysis of key drivers (high chemical resistance requirements, compliance with environmental and safety regulations, and the need for long-term durability and low maintenance), restraints (high material and installation costs, availability of alternative solutions, and slow adoption in cost-conscious markets), opportunities (high purity materials are driving demand for high cleanliness standards in the manufacturing sector and expansion of semiconductor fabs and industrial manufacturing facilities globally), and challenges (chemical resistance limitations and permeation and limited awareness and market penetration outside the semiconductor sector).

Market penetration: Comprehensive information on the coated ducts market offered by top players in the global coated ducts market.

Product development/innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the coated ducts market.

Market development: Comprehensive information about lucrative emerging markets — the report analyzes the market for coated ducts across regions.

Market diversification: Exhaustive information about new products, untapped regions, and recent developments in the global coated ducts market.

Competitive assessment: In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the coated ducts market

Contents

1 INTRODUCTION

- 1.1 STUDY OBJECTIVES
- 1.2 MARKET DEFINITION
- 1.3 STUDY SCOPE
 - 1.3.1 MARKETS COVERED AND REGIONAL SCOPE
 - 1.3.2 INCLUSIONS & EXCLUSIONS OF STUDY
- 1.4 CURRENCY CONSIDERED
- 1.5 UNITS CONSIDERED
- 1.6 STAKEHOLDERS
- 1.7 SUMMARY OF CHANGES

2 RESEARCH METHODOLOGY

- 2.1 RESEARCH DATA
 - 2.1.1 SECONDARY DATA
 - 2.1.1.1 List of key secondary sources
 - 2.1.1.2 Key data from secondary sources
 - 2.1.2 PRIMARY DATA
 - 2.1.2.1 Key data from primary sources
 - 2.1.2.2 List of primary interview participants—demand and supply sides
 - 2.1.2.3 Key industry insights
 - 2.1.2.4 Breakdown of interviews with experts
- 2.2 MARKET SIZE ESTIMATION
 - 2.2.1 BOTTOM-UP APPROACH
 - 2.2.2 TOP-DOWN APPROACH
- 2.3 FORECAST NUMBER CALCULATION
- 2.4 DATA TRIANGULATION
- 2.5 FACTOR ANALYSIS
- 2.6 ASSUMPTIONS
- 2.7 LIMITATIONS & RISKS

3 EXECUTIVE SUMMARY

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN COATED DUCTS MARKET

Coated Ducts Market by Coating Type (ETFE, ECTFE, Others), Type (Powder, Liquid), End-use Industry (Semiconduc...

4.2 COATED DUCTS MARKET, BY REGION

4.3 COATED DUCTS MARKET, BY KEY COUNTRY

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

5.2.1 DRIVERS

5.2.1.1 High chemical resistance requirements

5.2.1.2 Compliance with environmental and safety regulations

5.2.1.3 Need for long-term durability and low maintenance requirements

5.2.2 RESTRAINTS

5.2.2.1 High material and installation costs

5.2.2.2 Availability of alternative solutions

5.2.2.3 Slow adoption in cost-conscious markets

5.2.2.4 Stringent regulations related to PFAS

5.2.3 OPPORTUNITIES

5.2.3.1 High-purity materials create demand for high cleanliness standards in manufacturing sector

5.2.3.2 Expansion of semiconductor fabs and industrial manufacturing facilities

5.2.3.3 Meeting FM4922 and FM4910 standards enables use in regulated cleanroom and industrial environments

5.2.4 CHALLENGES

5.2.4.1 Chemical resistance limitations and permeation

5.2.4.2 Limited awareness and market penetration outside semiconductor sector

5.2.4.3 Fire safety and regulatory compliance constraints

6 INDUSTRY TRENDS

6.1 VALUE CHAIN ANALYSIS

6.1.1 RAW MATERIAL SUPPLIERS

6.1.2 MANUFACTURERS

6.1.3 DISTRIBUTORS

6.1.4 END USERS

6.2 ECOSYSTEM ANALYSIS

6.3 PORTER'S FIVE FORCES ANALYSIS

6.3.1 THREAT OF NEW ENTRANTS

6.3.2 THREAT OF SUBSTITUTES

6.3.3 BARGAINING POWER OF SUPPLIERS

- 6.3.4 BARGAINING POWER OF BUYERS
- 6.3.5 INTENSITY OF COMPETITIVE RIVALRY
- 6.4 KEY STAKEHOLDERS AND BUYING CRITERIA
 - 6.4.1 KEY STAKEHOLDERS IN BUYING PROCESS
 - 6.4.2 QUALITY
 - 6.4.3 SERVICE
 - 6.4.4 BUYING CRITERIA
- 6.5 TRADE ANALYSIS
 - 6.5.1 EXPORT SCENARIO (HS CODE 721049)
 - 6.5.2 IMPORT SCENARIO (HS CODE 721049)
- 6.6 TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS
- 6.7 TECHNOLOGY ANALYSIS
 - 6.7.1 KEY TECHNOLOGIES
 - 6.7.1.1 Automated powder coating
 - 6.7.1.2 Primerless ECTFE
 - 6.7.1.3 Induction preheating technology
 - 6.7.2 COMPLEMENTARY TECHNOLOGIES
 - 6.7.2.1 Plasma surface activation
 - 6.7.2.2 Electrostatic charging systems
- 6.8 MACROECONOMIC INDICATORS
 - 6.8.1 GDP TRENDS AND FORECASTS
- 6.9 PRICING ANALYSIS
 - 6.9.1 AVERAGE SELLING PRICE TREND, BY REGION
- 6.10 REGULATORY LANDSCAPE
 - 6.10.1 NORTH AMERICA
 - 6.10.2 ASIA PACIFIC
 - 6.10.3 EUROPE
 - 6.10.4 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
- 6.11 IMPACT OF AI/GEN AI
- 6.12 KEY CONFERENCES AND EVENTS, 2025–2026
- 6.13 CASE STUDY ANALYSIS
 - 6.13.1 HIGH-PURITY HALAR ECTFE COATINGS FOR SEMICONDUCTOR VENTILATION AND EXHAUST SYSTEMS
 - 6.13.2 PSP-COATED METAL DUCT REVOLUTIONIZED WASTEWATER ODOR CONTROL SYSTEMS
 - 6.13.3 USE OF ECTFE-COATED DUCTS IN PHARMACEUTICAL MANUFACTURING FACILITY
- 6.14 INVESTMENT AND FUNDING SCENARIO

6.15 PATENT ANALYSIS

6.15.1 INTRODUCTION

6.15.2 LEGAL STATUS OF PATENTS

6.15.3 JURISDICTION ANALYSIS

6.16 IMPACT OF 2025 US TARIFF – OVERVIEW

6.16.1 INTRODUCTION

6.16.2 KEY TARIFF RATES

6.16.3 PRICE IMPACT ANALYSIS

6.16.4 IMPACT ON COUNTRY/REGION

6.16.4.1 US

6.16.4.2 Europe

6.16.4.3 Asia Pacific

6.16.5 IMPACT ON END-USE INDUSTRIES

7 COATED DUCTS MARKET, BY TYPE

7.1 INTRODUCTION

7.2 POWDER

7.2.1 ENVIRONMENTAL BENEFITS TO DRIVE ADOPTION

7.3 LIQUID

7.3.1 VERSATILITY AND ENHANCED PROTECTION TO SUPPORT MARKET GROWTH

8 COATED DUCTS MARKET, BY COATING TYPE

8.1 INTRODUCTION

8.2 ETFE COATINGS

8.2.1 OUTSTANDING CHEMICAL RESISTANCE, THERMAL ENDURANCE, AND UV STABILITY TO DRIVE ADOPTION

8.3 ECTFE COATINGS

8.3.1 TECHNOLOGICAL DEVELOPMENTS TO BOOST MARKET GROWTH

8.4 OTHER COATINGS

9 COATED DUCTS MARKET, BY END-USE INDUSTRY

9.1 INTRODUCTION

9.2 SEMICONDUCTOR MANUFACTURING

9.2.1 NEED FOR PRECISION, CONTAMINATION CONTROL, AND DURABILITY TO DRIVE MARKET

9.3 PHARMACEUTICAL

9.3.1 NEED FOR ENHANCED HYGIENE AND IMPROVEMENT OF OVERALL DURABILITY OF DUCT SYSTEMS TO PROPEL MARKET

9.4 OIL & GAS

9.4.1 ABILITY TO WITHSTAND AGGRESSIVE CONDITIONS FOUND IN OIL RIGS, REFINERIES, AND PETROCHEMICAL PLANTS TO DRIVE MARKET

9.5 FOOD PROCESSING

9.5.1 NEED TO ENSURE HYGIENE AND SAFETY IN OPERATIONS TO DRIVE ADOPTION

9.6 CHEMICAL MANUFACTURING

9.6.1 ADVANCED COATED DUCTS MAXIMIZE EFFICIENCY AND LONGEVITY IN CHEMICAL MANUFACTURING

9.7 OTHER END-USE INDUSTRIES

10 COATED DUCTS MARKET, BY REGION

10.1 INTRODUCTION

10.2 NORTH AMERICA

10.2.1 US

10.2.1.1 Stringent energy efficiency regulations to fuel market growth

10.2.2 CANADA

10.2.2.1 Expanding applications in semiconductor manufacturing industry to propel market

10.2.3 MEXICO

10.2.3.1 Robust food & beverage sector to drive market

10.3 ASIA PACIFIC

10.3.1 CHINA

10.3.1.1 Rapid industrialization and strong government initiatives to fuel market growth

10.3.2 JAPAN

10.3.2.1 Advancements in pharmaceutical industry to drive market

10.3.3 INDIA

10.3.3.1 Growing semiconductor industry to drive market

10.3.4 SOUTH KOREA

10.3.4.1 Strong chemical processing and pharmaceutical sectors to drive demand

10.3.5 TAIWAN

10.3.5.1 Presence of key manufacturers to support market growth

10.3.6 REST OF ASIA PACIFIC

10.4 EUROPE

10.4.1 GERMANY

10.4.1.1 Strong industrial base, technological advancements, and commitment to sustainability to drive growth

10.4.2 UK

10.4.2.1 Need to boost safety and efficiency across high-growth sectors to drive market

10.4.3 FRANCE

10.4.3.1 Strategic investments in semiconductor industry to drive market

10.4.4 ITALY

10.4.4.1 Growth in food processing industry to support market growth

10.4.5 NETHERLANDS

10.4.5.1 Hygiene standards in food processing to propel growth

10.4.6 REST OF EUROPE

10.5 MIDDLE EAST & AFRICA

10.5.1 GCC COUNTRIES

10.5.1.1 Saudi Arabia

10.5.1.1.1 Government initiatives to support market growth

10.5.1.2 Rest of GCC countries

10.5.2 SOUTH AFRICA

10.5.2.1 Expanding pharmaceutical sector to drive demand for advanced coated duct systems

10.5.3 REST OF MIDDLE EAST & AFRICA

10.6 SOUTH AMERICA

10.6.1 BRAZIL

10.6.1.1 Oil & gas investment plan drives demand for advanced coated duct systems

10.6.2 ARGENTINA

10.6.2.1 Advancements across key industries to propel market

10.6.3 REST OF SOUTH AMERICA

11 COMPETITIVE LANDSCAPE

11.1 OVERVIEW

11.2 KEY PLAYER STRATEGIES/RIGHT TO WIN

11.3 REVENUE ANALYSIS

11.4 MARKET SHARE ANALYSIS

11.5 COMPANY VALUATION AND FINANCIAL METRICS

11.6 BRAND/PRODUCT COMPARISON ANALYSIS

11.7 COMPANY EVALUATION MATRIX: KEY PLAYERS, 2024

11.7.1 STARS

- 11.7.2 EMERGING LEADERS
- 11.7.3 PERVASIVE PLAYERS
- 11.7.4 PARTICIPANTS
- 11.7.5 COMPANY FOOTPRINT: KEY PLAYERS, 2024
 - 11.7.5.1 Company footprint
 - 11.7.5.2 Region footprint
 - 11.7.5.3 Coating type footprint
 - 11.7.5.4 Type footprint
 - 11.7.5.5 End-use industry footprint
- 11.8 COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2024
 - 11.8.1 PROGRESSIVE COMPANIES
 - 11.8.2 RESPONSIVE COMPANIES
 - 11.8.3 DYNAMIC COMPANIES
 - 11.8.4 STARTING BLOCKS
 - 11.8.5 COMPETITIVE BENCHMARKING: STARTUPS/SMES, 2024
 - 11.8.5.1 Detailed list of key startups/SMEs
 - 11.8.5.2 Competitive benchmarking of key startups/SMEs
- 11.9 COMPETITIVE SCENARIO
 - 11.9.1 EXPANSIONS
 - 11.9.2 DEALS
 - 11.9.3 OTHER DEVELOPMENTS

12 COMPANY PROFILES

- 12.1 KEY PLAYERS
 - 12.1.1 KENYON PTE LTD
 - 12.1.1.1 Business overview
 - 12.1.1.2 Products/Solutions/Services offered
 - 12.1.1.3 MnM view
 - 12.1.1.3.1 Key strengths
 - 12.1.1.3.2 Strategic choices
 - 12.1.1.3.3 Weaknesses and competitive threats
 - 12.1.2 EXYTE GROUP
 - 12.1.2.1 Business overview
 - 12.1.2.2 Products/Solutions/Services offered
 - 12.1.2.3 Recent developments
 - 12.1.2.3.1 Deals
 - 12.1.2.3.2 Expansions
 - 12.1.2.3.3 Other developments

- 12.1.2.4 MnM view
 - 12.1.2.4.1 Key strengths
 - 12.1.2.4.2 Strategic choices
 - 12.1.2.4.3 Weaknesses and competitive threats
- 12.1.3 UANGYIH-TECH INDUSTRIAL CO., LTD
 - 12.1.3.1 Business overview
 - 12.1.3.2 Products/Solutions/Services offered
 - 12.1.3.3 MnM view
 - 12.1.3.3.1 Key strengths
 - 12.1.3.3.2 Strategic choices
 - 12.1.3.3.3 Weaknesses and competitive threats
- 12.1.4 SEBO MEC
 - 12.1.4.1 Business overview
 - 12.1.4.2 Products/Solutions/Services offered
 - 12.1.4.3 MnM view
 - 12.1.4.3.1 Key strengths
 - 12.1.4.3.2 Strategic choices
 - 12.1.4.3.3 Weaknesses and competitive threats
- 12.1.5 CHENFULL INTERNATIONAL CO., LTD.
 - 12.1.5.1 Business overview
 - 12.1.5.2 Products/Solutions/Services offered
 - 12.1.5.3 MnM view
 - 12.1.5.3.1 Key strengths
 - 12.1.5.3.2 Strategic choices
 - 12.1.5.3.3 Weaknesses and competitive threats
- 12.1.6 ACESIAN PARTNERS LIMITED
 - 12.1.6.1 Business overview
 - 12.1.6.2 Products/Solutions/Services offered
 - 12.1.6.3 Recent developments
 - 12.1.6.3.1 Expansions
 - 12.1.6.4 MnM view
 - 12.1.6.4.1 Key strengths
 - 12.1.6.4.2 Strategic choices
 - 12.1.6.4.3 Weaknesses and competitive threats
- 12.1.7 SIGMA ROTO LINING PVT LTD
 - 12.1.7.1 Business overview
 - 12.1.7.2 Products/Solutions/Services offered
 - 12.1.7.3 MnM view
 - 12.1.7.3.1 Key strengths

12.1.7.3.2 Strategic choices

12.1.7.3.3 Weaknesses and competitive threats

12.1.8 VIRON INTERNATIONAL

12.1.8.1 Business overview

12.1.8.2 Products/Solutions/Services offered

12.1.8.3 MnM view

12.1.8.3.1 Key strengths

12.1.8.3.2 Strategic choices

12.1.8.3.3 Weaknesses and competitive threats

12.1.9 DONGSHENG (ZHANGJIAGANG) ENVIRONMENTAL PROTECTION TECHNOLOGY CO., LTD.

12.1.9.1 Business overview

12.1.9.2 Products/Solutions/Services offered

12.1.9.3 MnM view

12.1.10 SPIRAL MANUFACTURING CO., INC.

12.1.10.1 Business overview

12.1.10.2 Products/Solutions/Services offered

12.1.10.3 MnM view

12.1.11 JUNHAO CO., LTD.

12.1.11.1 Business overview

12.1.11.2 Products/Solutions/Services offered

12.1.12 EPIROC MINING INDIA LIMITED

12.1.12.1 Business overview

12.1.12.2 Products/Solutions/Services offered

12.1.13 LBF TECHNIK GMBH

12.1.13.1 Business overview

12.1.13.2 Products/Solutions/Services offered

12.1.14 SHANGHAI SHENGJIAN TECHNOLOGY CO., LTD

12.1.14.1 Business overview

12.1.14.2 Products/Solutions/Services offered

12.1.14.3 MnM view

12.1.15 ATS DUCT INC.

12.1.15.1 Business overview

12.1.15.2 Products/Solutions/Services offered

12.1.16 CHERN DAR ENTERPRISE CO., LTD.

12.1.16.1 Business overview

12.1.16.2 Products/Solutions/Services offered

12.1.17 DIANDUO (M) SDN BHD

12.1.17.1 Business overview

- 12.1.17.2 Products/Solutions/Services offered
- 12.1.18 WOOJIN I&S CO., LTD.
 - 12.1.18.1 Business overview
 - 12.1.18.2 Products/Solutions/Services offered
- 12.2 OTHER PLAYERS
 - 12.2.1 HUENG LUEI PROCESS INDUSTRY CO., LTD.: COMPANY OVERVIEW
 - 12.2.2 SIMTECH PROCESS SYSTEMS
 - 12.2.3 VENT TRADE SP. Z O.O.
 - 12.2.4 ANHUI GELINSIDA
 - 12.2.5 EMPICO COATING SDN BHD
 - 12.2.6 BS PROJECTS PVT. LTD.
 - 12.2.7 BERLINERLUFT. TECHNIK GMBH

13 APPENDIX

- 13.1 DISCUSSION GUIDE
- 13.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL
- 13.3 CUSTOMIZATION OPTIONS
- 13.4 RELATED REPORTS
- 13.5 AUTHOR DETAILS

List Of Tables

LIST OF TABLES

TABLE 1 LIST OF KEY SECONDARY SOURCES

TABLE 2 COATED DUCTS MARKET: ROLE OF PLAYERS IN ECOSYSTEM

TABLE 3 COATED DUCTS MARKET: PORTER'S FIVE FORCES ANALYSIS

TABLE 4 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE END-USE INDUSTRIES

TABLE 5 KEY BUYING CRITERIA FOR TOP THREE END-USE INDUSTRIES

TABLE 6 EXPORT SCENARIO FOR HS CODE 721049-COMPLIANT PRODUCTS, BY COUNTRY, 2019–2023 (USD THOUSAND)

TABLE 7 IMPORT SCENARIO FOR HS CODE 721049-COMPLIANT PRODUCTS, BY COUNTRY, 2019–2023 (USD MILLION)

TABLE 8 PROJECTED REAL GDP GROWTH (ANNUAL PERCENTAGE CHANGE) OF KEY COUNTRIES, 2019–2023

TABLE 9 ANNUAL GDP PERCENTAGE CHANGE AND PROJECTION OF KEY COUNTRIES, 2024–2029

TABLE 10 NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 11 ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 12 EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 13 COATED DUCTS MARKET: KEY CONFERENCES AND EVENTS, 2025–2026

TABLE 14 US ADJUSTED RECIPROCAL TARIFF RATES

TABLE 15 KEY PRODUCT-RELATED TARIFF EFFECTIVE FOR COATED DUCTS

TABLE 16 COATED DUCTS MARKET, BY TYPE, 2021–2024 (USD MILLION)

TABLE 17 COATED DUCTS MARKET, BY TYPE, 2025–2030 (USD MILLION)

TABLE 18 COATED DUCTS MARKET, BY COATING TYPE, 2021–2024 (USD MILLION)

TABLE 19 COATED DUCTS MARKET, BY COATING TYPE, 2025–2030 (USD MILLION)

TABLE 20 COATED DUCTS MARKET, BY END-USE INDUSTRY, 2021–2024 (USD MILLION)

TABLE 21 COATED DUCTS MARKET, BY END-USE INDUSTRY, 2025–2030 (USD MILLION)

TABLE 22 COATED DUCTS MARKET, BY REGION, 2021–2024 (USD MILLION)

Coated Ducts Market by Coating Type (ETFE, ECTFE, Others), Type (Powder, Liquid), End-use Industry (Semiconduc...

TABLE 23 COATED DUCTS MARKET, BY REGION, 2025–2030 (USD MILLION)

TABLE 24 COATED DUCTS MARKET, BY REGION, 2021–2024 (THOUSAND METER)

TABLE 25 COATED DUCTS MARKET, BY REGION, 2025–2030 (THOUSAND METER)

TABLE 26 NORTH AMERICA: COATED DUCTS MARKET, BY COUNTRY, 2021–2024 (USD MILLION)

TABLE 27 NORTH AMERICA: COATED DUCTS MARKET, BY COUNTRY, 2025–2030 (USD MILLION)

TABLE 28 NORTH AMERICA: COATED DUCTS MARKET, BY COUNTRY, 2021–2024 (THOUSAND METER)

TABLE 29 NORTH AMERICA: COATED DUCTS MARKET, BY COUNTRY, 2025–2030 (THOUSAND METER)

TABLE 30 NORTH AMERICA: COATED DUCTS MARKET, BY TYPE, 2021–2024 (USD MILLION)

TABLE 31 NORTH AMERICA: COATED DUCTS MARKET, BY TYPE, 2025–2030 (USD MILLION)

TABLE 32 NORTH AMERICA: COATED DUCTS MARKET, BY COATING TYPE, 2021–2024 (USD MILLION)

TABLE 33 NORTH AMERICA: COATED DUCTS MARKET, BY COATING TYPE, 2025–2030 (USD MILLION)

TABLE 34 NORTH AMERICA: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2021–2024 (USD MILLION)

TABLE 35 NORTH AMERICA: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2025–2030 (USD MILLION)

TABLE 36 US: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2021–2024 (USD MILLION)

TABLE 37 US: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2025–2030 (USD MILLION)

TABLE 38 CANADA: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2021–2024 (USD MILLION)

TABLE 39 CANADA: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2025–2030 (USD MILLION)

TABLE 40 MEXICO: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2021–2024 (USD MILLION)

TABLE 41 MEXICO: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2025–2030 (USD MILLION)

TABLE 42 ASIA PACIFIC: COATED DUCTS MARKET, BY COUNTRY, 2021–2024 (USD MILLION)

TABLE 43 ASIA PACIFIC: COATED DUCTS MARKET, BY COUNTRY, 2025–2030
(USD MILLION)

TABLE 44 ASIA PACIFIC: COATED DUCTS MARKET, BY COUNTRY, 2021–2024
(THOUSAND METER)

TABLE 45 ASIA PACIFIC: COATED DUCTS MARKET, BY COUNTRY, 2025–2030
(THOUSAND METER)

TABLE 46 ASIA PACIFIC: COATED DUCTS MARKET, BY TYPE, 2021–2024 (USD
MILLION)

TABLE 47 ASIA PACIFIC: COATED DUCTS MARKET, BY TYPE, 2025–2030 (USD
MILLION)

TABLE 48 ASIA PACIFIC: COATED DUCTS MARKET, BY COATING TYPE,
2021–2024 (USD MILLION)

TABLE 49 ASIA PACIFIC: COATED DUCTS MARKET, BY COATING TYPE,
2025–2030 (USD MILLION)

TABLE 50 ASIA PACIFIC: COATED DUCTS MARKET, BY END-USE INDUSTRY,
2021–2024 (USD MILLION)

TABLE 51 ASIA PACIFIC: COATED DUCTS MARKET, BY END-USE INDUSTRY,
2025–2030 (USD MILLION)

TABLE 52 CHINA: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2021–2024
(USD MILLION)

TABLE 53 CHINA: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2025–2030
(USD MILLION)

TABLE 54 JAPAN: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2021–2024
(USD MILLION)

TABLE 55 JAPAN: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2025–2030
(USD MILLION)

TABLE 56 INDIA: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2021–2024
(USD MILLION)

TABLE 57 INDIA: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2025–2030
(USD MILLION)

TABLE 58 SOUTH KOREA: COATED DUCTS MARKET, BY END-USE INDUSTRY,
2021–2024 (USD MILLION)

TABLE 59 SOUTH KOREA: COATED DUCTS MARKET, BY END-USE INDUSTRY,
2025–2030 (USD MILLION)

TABLE 60 TAIWAN: COATED DUCTS MARKET, BY END-USE INDUSTRY,
2021–2024 (USD MILLION)

TABLE 61 TAIWAN: COATED DUCTS MARKET, BY END-USE INDUSTRY,
2025–2030 (USD MILLION)

TABLE 62 REST OF ASIA PACIFIC: COATED DUCTS MARKET, BY END-USE

INDUSTRY, 2021–2024 (USD MILLION)

TABLE 63 REST OF ASIA PACIFIC: COATED DUCTS MARKET, BY END-USE
INDUSTRY, 2025–2030 (USD MILLION)

TABLE 64 EUROPE: COATED DUCTS MARKET, BY COUNTRY, 2021–2024 (USD
MILLION)

TABLE 65 EUROPE: COATED DUCTS MARKET, BY COUNTRY, 2025–2030 (USD
MILLION)

TABLE 66 EUROPE: COATED DUCTS MARKET, BY COUNTRY, 2021–2024
(THOUSAND METER)

TABLE 67 EUROPE: COATED DUCTS MARKET, BY COUNTRY, 2025–2030
(THOUSAND METER)

TABLE 68 EUROPE: COATED DUCTS MARKET, BY TYPE, 2021–2024 (USD
MILLION)

TABLE 69 EUROPE: COATED DUCTS MARKET, BY TYPE, 2025–2030 (USD
MILLION)

TABLE 70 EUROPE: COATED DUCTS MARKET, BY COATING TYPE, 2021–2024
(USD MILLION)

TABLE 71 EUROPE: COATED DUCTS MARKET, BY COATING TYPE, 2025–2030
(USD MILLION)

TABLE 72 EUROPE: COATED DUCTS MARKET, BY END-USE INDUSTRY,
2021–2024 (USD MILLION)

TABLE 73 EUROPE: COATED DUCTS MARKET, BY END-USE INDUSTRY,
2025–2030 (USD MILLION)

TABLE 74 GERMANY: COATED DUCTS MARKET, BY END-USE INDUSTRY,
2021–2024 (USD MILLION)

TABLE 75 GERMANY: COATED DUCTS MARKET, BY END-USE INDUSTRY,
2025–2030 (USD MILLION)

TABLE 76 UK: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2021–2024
(USD MILLION)

TABLE 77 UK: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2025–2030
(USD MILLION)

TABLE 78 FRANCE: COATED DUCTS MARKET, BY END-USE INDUSTRY,
2021–2024 (USD MILLION)

TABLE 79 FRANCE: COATED DUCTS MARKET, BY END-USE INDUSTRY,
2025–2030 (USD MILLION)

TABLE 80 ITALY: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2021–2024
(USD MILLION)

TABLE 81 ITALY: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2025–2030
(USD MILLION)

TABLE 82 NETHERLANDS: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2021–2024 (USD MILLION)

TABLE 83 NETHERLANDS: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2025–2030 (USD MILLION)

TABLE 84 REST OF EUROPE: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2021–2024 (USD MILLION)

TABLE 85 REST OF EUROPE: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2025–2030 (USD MILLION)

TABLE 86 MIDDLE EAST & AFRICA: COATED DUCTS MARKET, BY COUNTRY, 2021–2024 (USD MILLION)

TABLE 87 MIDDLE EAST & AFRICA: COATED DUCTS MARKET, BY COUNTRY, 2025–2030 (USD MILLION)

TABLE 88 MIDDLE EAST & AFRICA: COATED DUCTS MARKET, BY COUNTRY, 2021–2024 (THOUSAND METER)

TABLE 89 MIDDLE EAST & AFRICA: COATED DUCTS MARKET, BY COUNTRY, 2025–2030 (THOUSAND METER)

TABLE 90 MIDDLE EAST & AFRICA: COATED DUCTS MARKET, BY TYPE, 2021–2024 (USD MILLION)

TABLE 91 MIDDLE EAST & AFRICA: COATED DUCTS MARKET, BY TYPE, 2025–2030 (USD MILLION)

TABLE 92 MIDDLE EAST & AFRICA: COATED DUCTS MARKET, BY COATING TYPE, 2021–2024 (USD MILLION)

TABLE 93 MIDDLE EAST & AFRICA: COATED DUCTS MARKET, BY COATING TYPE, 2025–2030 (USD MILLION)

TABLE 94 MIDDLE EAST & AFRICA: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2021–2024 (USD MILLION)

TABLE 95 MIDDLE EAST & AFRICA: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2025–2030 (USD MILLION)

TABLE 96 SAUDI ARABIA: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2021–2024 (USD MILLION)

TABLE 97 SAUDI ARABIA: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2025–2030 (USD MILLION)

TABLE 98 REST OF GCC COUNTRIES: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2021–2024 (USD MILLION)

TABLE 99 REST OF GCC COUNTRIES: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2025–2030 (USD MILLION)

TABLE 100 SOUTH AFRICA: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2021–2024 (USD MILLION)

TABLE 101 SOUTH AFRICA: COATED DUCTS MARKET, BY END-USE INDUSTRY,

2025–2030 (USD MILLION)

TABLE 102 REST OF MIDDLE EAST & AFRICA: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2021–2024 (USD MILLION)

TABLE 103 REST OF MIDDLE EAST & AFRICA: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2025–2030 (USD MILLION)

TABLE 104 SOUTH AMERICA: COATED DUCTS MARKET, BY COUNTRY, 2021–2024 (USD MILLION)

TABLE 105 SOUTH AMERICA: COATED DUCTS MARKET, BY COUNTRY, 2025–2030 (USD MILLION)

TABLE 106 SOUTH AMERICA: COATED DUCTS MARKET, BY COUNTRY, 2021–2024 (THOUSAND METER)

TABLE 107 SOUTH AMERICA: COATED DUCTS MARKET, BY COUNTRY, 2025–2030 (THOUSAND METER)

TABLE 108 SOUTH AMERICA: COATED DUCTS MARKET, BY TYPE, 2021–2024 (USD MILLION)

TABLE 109 SOUTH AMERICA: COATED DUCTS MARKET, BY TYPE, 2025–2030 (USD MILLION)

TABLE 110 SOUTH AMERICA: COATED DUCTS MARKET, BY COATING TYPE, 2021–2024 (USD MILLION)

TABLE 111 SOUTH AMERICA: COATED DUCTS MARKET, BY COATING TYPE, 2025–2030 (USD MILLION)

TABLE 112 SOUTH AMERICA: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2021–2024 (USD MILLION)

TABLE 113 SOUTH AMERICA: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2025–2030 (USD MILLION)

TABLE 114 BRAZIL: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2021–2024 (USD MILLION)

TABLE 115 BRAZIL: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2025–2030 (USD MILLION)

TABLE 116 ARGENTINA: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2021–2024 (USD MILLION)

TABLE 117 ARGENTINA: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2025–2030 (USD MILLION)

TABLE 118 REST OF SOUTH AMERICA: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2021–2024 (USD MILLION)

TABLE 119 REST OF SOUTH AMERICA: COATED DUCTS MARKET, BY END-USE INDUSTRY, 2025–2030 (USD MILLION)

TABLE 120 OVERVIEW OF STRATEGIES ADOPTED BY KEY PLAYERS IN COATED DUCTS MARKET BETWEEN JANUARY 2020 AND APRIL 2025

TABLE 121 REVENUE ANALYSIS OF TOP FIVE PLAYERS IN COATED DUCTS MARKET, 2024

TABLE 122 COATED DUCTS MARKET: DEGREE OF COMPETITION

TABLE 123 COATED DUCTS MARKET: REGION FOOTPRINT

TABLE 124 COATED DUCTS MARKET: COATING TYPE FOOTPRINT

TABLE 125 COATED DUCTS MARKET: TYPE FOOTPRINT

TABLE 126 COATED DUCTS MARKET: END-USE INDUSTRY FOOTPRINT

TABLE 127 COATED DUCTS MARKET: DETAILED LIST OF KEY STARTUPS/SMES

TABLE 128 COATED DUCTS MARKET: COMPETITIVE BENCHMARKING OF KEY STARTUPS/SMES

TABLE 129 COATED DUCTS MARKET: EXPANSIONS, JANUARY 2020–APRIL 2025

TABLE 130 COATED DUCTS MARKET: DEALS, JANUARY 2020–APRIL 2025

TABLE 131 COATED DUCTS MARKET: OTHER DEVELOPMENTS, JANUARY 2020–APRIL 2025

TABLE 132 KENYON PTE LTD: COMPANY OVERVIEW

TABLE 133 KENYON PTE LTD: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 134 EXYTE GROUP: COMPANY OVERVIEW

TABLE 135 EXYTE GROUP: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 136 EXYTE GROUP: DEALS, JANUARY 2020–APRIL 2025

TABLE 137 EXYTE GROUP: EXPANSIONS, JANUARY 2020–APRIL 2025

TABLE 138 EXYTE GROUP: OTHER DEVELOPMENTS, JANUARY 2020–APRIL 2025

TABLE 139 UANGYIH-TECH INDUSTRIAL CO., LTD.: COMPANY OVERVIEW

TABLE 140 UANGYIH-TECH INDUSTRIAL CO., LTD.:
PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 141 SEBO MEC: COMPANY OVERVIEW

TABLE 142 SEBO MEC: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 143 CHENFULL INTERNATIONAL CO., LTD.: COMPANY OVERVIEW

TABLE 144 CHENFULL INTERNATIONAL CO., LTD.:
PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 145 ACESIAN PARTNERS LIMITED: COMPANY OVERVIEW

TABLE 146 ACESIAN PARTNERS LIMITED: PRODUCTS/SOLUTIONS/SERVICES
OFFERED

TABLE 147 ACESIAN PARTNERS LIMITED: EXPANSIONS

TABLE 148 SIGMA ROTO LINING PVT LTD: COMPANY OVERVIEW

TABLE 149 SIGMA ROTO LINING PVT LTD: PRODUCTS/SOLUTIONS/SERVICES
OFFERED

TABLE 150 VIRON INTERNATIONAL: COMPANY OVERVIEW

TABLE 151 VIRON INTERNATIONAL: PRODUCTS/SOLUTIONS/SERVICES
OFFERED

TABLE 152 DONGSHENG (ZHANGJIAGANG) ENVIRONMENTAL PROTECTION TECHNOLOGY CO., LTD.: COMPANY OVERVIEW

TABLE 153 DONGSHENG (ZHANGJIAGANG) ENVIRONMENTAL PROTECTION TECHNOLOGY CO., LTD.: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 154 SPIRAL MANUFACTURING CO., INC.: COMPANY OVERVIEW

TABLE 155 SPIRAL MANUFACTURING CO., INC.:
PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 156 JUNHAO CO., LTD.: COMPANY OVERVIEW

TABLE 157 JUNHAO CO., LTD.: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 158 EPIROC MINING INDIA LIMITED: COMPANY OVERVIEW

TABLE 159 EPIROC MINING INDIA LIMITED: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 160 LBF TECHNIK GMBH: COMPANY OVERVIEW

TABLE 161 LBF TECHNIK GMBH: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 162 SHANGHAI SHENGJIAN TECHNOLOGY CO., LTD.: COMPANY OVERVIEW

TABLE 163 SHANGHAI SHENGJIAN TECHNOLOGY CO., LTD.:
PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 164 ATS DUCT INC.: COMPANY OVERVIEW

TABLE 165 ATS DUCT INC.: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 166 CHERN DAR ENTERPRISE CO., LTD.: COMPANY OVERVIEW

TABLE 167 CHERN DAR ENTERPRISE CO., LTD.:
PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 168 DIANDUO (M) SDN BHD: COMPANY OVERVIEW

TABLE 169 DIANDUO (M) SDN BHD: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 170 WOOJIN I&S CO., LTD.: COMPANY OVERVIEW

TABLE 171 WOOJIN I&S CO., LTD.: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 172 SIMTECH PROCESS SYSTEMS: COMPANY OVERVIEW

TABLE 173 VENT TRADE SP. Z O.O.: COMPANY OVERVIEW

TABLE 174 ANHUI GELINSIDA: COMPANY OVERVIEW

TABLE 175 EMPICO COATING SDN BHD: COMPANY OVERVIEW

TABLE 176 BS PROJECTS PVT. LTD.: COMPANY OVERVIEW

TABLE 177 BERLINERLUFT. TECHNIK GMBH: COMPANY OVERVIEW

List Of Figures

LIST OF FIGURES

FIGURE 1 COATED DUCTS MARKET SEGMENTATION AND REGIONAL SCOPE

FIGURE 2 YEARS CONSIDERED

FIGURE 3 COATED DUCTS MARKET: RESEARCH DESIGN

FIGURE 4 COATED DUCTS MARKET: BOTTOM-UP APPROACH

FIGURE 5 COATED DUCTS MARKET: TOP-DOWN APPROACH

FIGURE 6 COATED DUCTS MARKET: MARKET SIZE ESTIMATION

FIGURE 7 DEMAND-SIDE FORECAST PROJECTIONS

FIGURE 8 COATED DUCTS MARKET: DATA TRIANGULATION

FIGURE 9 ETFE COATINGS SEGMENT TO REGISTER HIGHEST GROWTH DURING FORECAST PERIOD

FIGURE 10 SEMICONDUCTOR MANUFACTURING SEGMENT TO WITNESS HIGHEST GROWTH BETWEEN 2025 & 2030

FIGURE 11 POWDER SEGMENT TO REGISTER HIGHER GROWTH DURING FORECAST PERIOD

FIGURE 12 ASIA PACIFIC TO BE FASTEST-GROWING MARKET DURING FORECAST PERIOD

FIGURE 13 GROWING DEMAND FROM SEMICONDUCTOR AND PHARMACEUTICAL INDUSTRIES TO DRIVE MARKET

FIGURE 14 ASIA PACIFIC TO WITNESS HIGH GROWTH DURING FORECAST PERIOD

FIGURE 15 CHINA TO REGISTER HIGHEST CAGR DURING FORECAST PERIOD

FIGURE 16 COATED DUCTS MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

FIGURE 17 COATED DUCTS MARKET: VALUE CHAIN ANALYSIS

FIGURE 18 COATED DUCTS MARKET: ECOSYSTEM

FIGURE 19 COATED DUCTS MARKET: PORTER'S FIVE FORCES ANALYSIS

FIGURE 20 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE END-USE INDUSTRIES

FIGURE 21 KEY BUYING CRITERIA FOR TOP THREE END-USE INDUSTRIES

FIGURE 22 EXPORT DATA FOR HS CODE 721049-COMPLIANT PRODUCTS, BY COUNTRY, 2019–2023 (USD THOUSAND)

FIGURE 23 IMPORT DATA FOR HS CODE 721049-COMPLIANT PRODUCTS, BY COUNTRY, 2019–2023 (USD THOUSAND)

FIGURE 24 COATED DUCTS MARKET: TRENDS AND DISRUPTIONS IMPACTING CUSTOMER BUSINESS

FIGURE 25 AVERAGE SELLING PRICE TREND, BY REGION, 2021–2024
(USD/METER)

FIGURE 26 INVESTMENT AND FUNDING SCENARIO, 2021–2024 (USD MILLION)

FIGURE 27 PATENTS APPLIED AND GRANTED, 2014–2024

FIGURE 28 LEGAL STATUS OF PATENTS (2014–2024)

FIGURE 29 TOP JURISDICTIONS
FIGURE 30 POWDER COATINGS TO DOMINATE
MARKET DURING FORECAST PERIOD

FIGURE 31 ETFE COATINGS TO DOMINATE MARKET DURING FORECAST
PERIOD

FIGURE 32 SEMICONDUCTOR MANUFACTURING SEGMENT TO DOMINATE
MARKET DURING FORECAST PERIOD

FIGURE 33 CHINA TO REGISTER HIGHEST GROWTH DURING FORECAST
PERIOD

FIGURE 34 NORTH AMERICA: COATED DUCTS MARKET SNAPSHOT

FIGURE 35 ASIA PACIFIC: COATED DUCTS MARKET SNAPSHOT

FIGURE 36 EUROPE: COATED DUCTS MARKET SNAPSHOT

FIGURE 37 COATED DUCTS MARKET SHARE ANALYSIS, 2024

FIGURE 38 VALUATION OF LEADING COMPANIES IN COATED DUCTS MARKET,
2024

FIGURE 39 FINANCIAL METRICS OF LEADING COMPANIES IN COATED DUCTS
MARKET, 2024

FIGURE 40 COATED DUCTS MARKET: BRAND/PRODUCT COMPARISON
ANALYSIS

FIGURE 41 COATED DUCTS MARKET: COMPANY EVALUATION MATRIX (KEY
PLAYERS), 2024

FIGURE 42 COATED DUCTS MARKET: OVERALL COMPANY FOOTPRINT

FIGURE 43 COATED DUCTS MARKET: COMPANY EVALUATION MATRIX
(STARTUPS/SMES), 2024

FIGURE 44 EXYTE GROUP: COMPANY SNAPSHOT

FIGURE 45 ACESIAN PARTNERS LIMITED: COMPANY SNAPSHOT

FIGURE 46 WOJIN I&S CO., LTD: COMPANY SNAPSHOT

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