

Coating Additives Market by Type (defoamers, wetting & dispersing agents, rheology modifiers), Formulation(water-borne, solvent-borne), Application(architectural, industrial, automotive & transportation, wood & furniture), Region - Global Forecast to 2028

<https://marketpublishers.com/r/C7318BC91CAEN.html>

Date: September 2023

Pages: 272

Price: US\$ 4,950.00 (Single User License)

ID: C7318BC91CAEN

Abstracts

The coating additives market is poised for significant growth, with a projected value of USD 8.3 billion in 2023 to USD 10.5 billion by 2028, at a CAGR of 4.7%. Cutting-edge high-performance and multifunctional additives are driving innovation in the coating industry. This innovation is ushering in an era where coatings become versatile protective shields, combining both protection and enhanced functionality. Multifunctional additives present an exciting opportunity in the coating additives market by offering various benefits to coatings, including improved durability, resistance to scratches, self-cleaning capabilities, and antimicrobial protection. The enhanced scratch resistance, a key feature of high-performance additives, aligns well with industries that prioritize both aesthetics and long-lasting performance. As the demand for coatings with expanded capabilities rises, the development and promotion of high-performance and multifunctional additives are not just opportunities but essential strategies. These additives not only fuel technical innovation but also open doors to emerging market segments, positioning industry players at the forefront of the ever-evolving landscape of coating additives.

“Rheology modifier was the largest type in coating additives market in 2022, in terms of value”

Rheology modifiers are additives strategically employed to manage the viscosity and

flow properties of paints and coatings. They wield a significant influence over pivotal attributes within the realm of paints and coatings, including but not limited to leveling, flow, gloss, adhesion, film thickness, coverage capacity, susceptibility to settling, and pigment stability. The primary reason for the increasing demand for these additives can be traced to the expansion of the construction and industrial sectors. These industries often depend on coatings to protect and improve the quality of their products, and rheology modifiers are indispensable tools in enhancing the performance and application characteristics of these coatings.

“Architectural is projected to be the largest application of coating additives market during the forecasted period”

The security and protection segment asserted its dominance in the market throughout 2022 and is expected to sustain its leadership position until 2028. This enduring prominence is underpinned by the surging demand emanating from emerging economies like China, Brazil, and India. These economies are pivotal consumers, employing aramid fibers for various military, industrial, and civil applications. The escalating need for thermal and ballistic protection in civil law enforcement and armed forces, driven by the rising challenges of insurgency and terrorism, further reinforces the segment's market leadership, heralding significant growth potential in this domain.

“Europe is estimated to be the second-largest coating additives market between 2023 and 2028, in terms of value.”

In 2022, Europe stands as the second-largest market for coating additives in terms of value. The European market operates under the regulatory framework of the Registration, Evaluation, Authorization, and Restriction of Chemical Substances (REACH). REACH plays a pivotal role in overseeing and providing guidelines to safeguard the environment and mitigate health risks associated with chemicals. Notably, the stringent regulations enforced by REACH have led to a consistent reduction in the use of high Volatile Organic Compound (VOC)-emitting resins in coatings across the region. Key manufacturing hubs for airplanes and automobiles, including countries like Germany, Spain, France, and Russia, are driving the demand for waterborne coating additives. This surge in demand is solidifying the region's robust global position in the coating additives market.

In the meticulous process of determining and verifying market sizes for multiple segments and subsegments, extensive primary interviews were conducted. A breakdown of the profiles of the primary interviewees are as follows:

By Company Type: Tier 1 - 69%, Tier 2 - 23%, and Tier 3 - 8%

By Designation: - Director Level - 27%, C-Level - 25%, and Others - 48%

By Region: North America - 32%, Europe - 28%, Asia Pacific - 21%, South America - 12%, and Middle East & Africa - 7%,

The key market players illustrated in the report include Evonik Industries AG(Germany), ALTANA AG(Germany), BASF SE(Germany), Dow Inc.(US), Nouryon(Netherlands), Arkema S.A.(France), ELEMENTIS PLC(UK), Allnex GMBH(Germany), Arkema S.A.(France), Eastman Chemical Company(US), and Ashland Inc.(US).

Research Coverage

This report segments the market for coating additives on the basis of type, formulation, application, and region, and provides estimations for the overall volume (Kiloton) and value (USD Million) of the market across various regions. A detailed analysis of key industry players has been conducted to provide insights into their business overviews, products & services, key strategies, new product launches, expansions, and mergers & acquisition associated with the market for coating additives.

Reasons to buy this report

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

The report provides insights on the following pointers:

Analysis of key drivers (Growing demand for waterborne chemistry, Prominence on high-performance and multifunctional additives, Rising demand for environmental-friendly products, Collective demand for corrosion protection), restraints (Raw material price instability, Regulatory compliance challenges), and challenges (Rising demand from building and construction sectors, Mounting automotive and aerospace sectors) Opportunities (Technical lumps to innovation)

Market Penetration: Comprehensive information on aramid fiber offered by top players in the global coating additives market

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the coating additives market

Market Development: Comprehensive information about lucrative emerging markets — the report analyzes the markets for coating additives across regions

Market Diversification: Exhaustive information about new products, untapped regions, and recent developments in the global coating additives market

Competitive Assessment: In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the coating additives market

Impact of recession on coating additives market

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About

Coating additives are special additives that are added to the paint and/or coating to enhance its performance and quality. The main function of additives is to modify the properties of the coating such as viscosity, gloss, impact resistance, foam, etc. which enhances the effectiveness of the coatings. Coating, in general, can be classified in to two types i.e. paint and powder coating. Paints are applied on the substrate using brush or rollers to form a thin film which is used for decorative or protective purpose. It is a suspension or solution of binder, pigment, and base. To these additives are added in small amounts in paints to provide a noteworthy effect on the product. For instance, they are used to improve pigment dispersibility, control foaming, modify surface tension, improve flow properties, etc. Depending on the purpose, base can either be water or a mineral solvent.

In powder coating, the powder is sprayed on the substrate, which is attracted towards the surface due to electrostatic charge that holds it in its place. The surface is then heated in an oven to form a continuous layer of a polymer coating on the substrate. Some of the methods that are used to apply the polymeric coating are dip coating, spray coating, fluidized bed, electro-coating, etc. Due to its advantages over paint coating, powder coatings are finding their increasing applications in automotive and transportation, appliances, architecture, wood & furniture, etc. Various types of additives used in powder coating are fluoropolymers, silicones, cellulose acetate, acrylate copolymers, zinc powder, barium titanate, etc.

However, the powder coating is still relatively younger than the paint coating, it is expected that the share of powder coating additive would exceed a market share of XX% of the total coating additive market by 2018. On the whole, the global coating additives market was estimated to be XX KT in 2012, which is expected to reach XX KT by 2018 growing at a CAGR of XX% from 2013. The major players in the coating additives market include BYK-Chemie (Germany), Akzonobel (The Netherlands), Arkema (France), Dow Chemical (U.S.), and Eastman Chemical (U.S.).

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