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Waterborne Coatings Market by Resin Type (Acrylic, Polyester, Alkyd, Epoxy, Polyurethane, PTFE, PVDF, PVDC), Application (Architectural and Industrial), and Region (Asia Pacific, North America, Europe, ME&A, South America) - Global Forecast to 2030

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Abstracts

The global waterborne coatings market size was USD 99.2 billion in 2021 and is projected to grow at a CAGR of 3.8% during 2022-2027 and 4.2% during 2028-2030 to reach USD 124.3 billion by 2027 and USD 140.7 billion by 2030. waterborne coatings have low VOC content, a longer pot life, and faster curing ability.

“The epoxy type resin is expected to register the highest CAGR of the overall waterborne coatings market during the forecast period, in terms of volume.”

Epoxy resins are used in protective and floor coatings due to their favorable mechanical properties, corrosion protection, and chemical resistance. Over the past few years, waterborne epoxy coatings have been developed to be environment-friendly with the use of waterborne technology during the manufacturing process, similar to the production of high-solid coatings, solvent-free coatings, and powder coatings. There has been an increase in the demand for epoxy resins from the coatings industry. This growth can be attributed to the increasing demand from dairies, pharmaceuticals, food processing units, electronics, aircraft hangars, and automobile workshops. This scenario is expected to continue during the forecast period.

“The architectural segment of application is projected to register the highest CAGR during the forecast period.”

Market drivers in this segment are infrastructural growth in various countries, and

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growth in applications, including residential, and non-residential industry. There is strong demand for these applications from the Asia Pacific region, especially from developing countries such as China, India, Thailand, Indonesia, and Malaysia. Global waterborne coating manufacturers are establishing their manufacturing facilities or sales offices in these emerging regions to cater to the increasing demand.

Asia - Pacific waterborne coatings market is projected to register the highest CAGR during the forecast period.

Asia Pacific is an emerging economy with many rapidly developing countries. Various industry players are willing to invest in this region. Most of the leading players in North America and Europe are planning to shift their manufacturing base to Asia Pacific as it offers inexpensive raw materials, low cost of production, and the ability to serve the local emerging market in a better way. The Asia Pacific region is experiencing increased demand for premium and high-quality products due to the increasing disposable income of the middle-class population. This has led to an increased demand for waterborne coatings in the Asia Pacific market.

In-depth interviews were conducted with Chief Executive Officers (CEOs), marketing directors, other innovation and technology directors, and executives from various key organizations operating in the waterborne coatings market, and information was gathered from secondary research to determine and verify the market size of several segments and subsegments.

By Company Type: Tier 1 – 60%, Tier 2 – 30%, and Tier 3 – 10%

By Designation: C Level – 30%, D Level – 60%, and Others – 10%

By Region: Europe – 20%, North America – 35%, APAC – 30%, South America- 5%, and the Middle East & Africa – 10%

The key companies profiled in this report are PPG Industries Inc. (US), and Sherwin-Williams Company (US).

Research Coverage:

This report provides detailed segmentation of the waterborne coatings market based on resin type, application, and region. Based on resin type, waterborne coatings industry has been segmented into Acrylic

Polyester, Alkyd, Epoxy, Polyurethane, PTFE, PVDF, PVDC, and Others. Based on application, the market has been segmented into architectural and industrial. Based on region, the market has been segmented into Asia Pacific, Europe, North America, South America, and the Middle East & Africa.

Key Benefits of Buying the Report

From an insights perspective, this research report focuses on various levels of analyses — industry analysis (industry trends), market share analysis of top players, and company profiles, which together comprise and discuss the basic views on the competitive landscape; emerging and high-growth segments of the market; high-growth regions; and market drivers, restraints, opportunities, and challenges.

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Contents

3 EXECUTIVE SUMMARY

4 PREMIUM INSIGHTS

5 MARKET OVERVIEW

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TABLE 202 ASIA PACIFIC: WATERBORNE COATINGS MARKET, BY RESIN TYPE, 2018–2021 (KILOTON)
TABLE 203 ASIA PACIFIC: WATERBORNE COATINGS MARKET, BY RESIN TYPE, 2022–2027 (KILOTON)
TABLE 204 ASIA PACIFIC: WATERBORNE COATINGS MARKET, BY RESIN TYPE, 2028–2030 (KILOTON)
TABLE 205 ASIA PACIFIC: WATERBORNE COATINGS MARKET, BY APPLICATION, 2018–2021 (USD MILLION)
TABLE 206 ASIA PACIFIC: WATERBORNE COATINGS MARKET, BY APPLICATION, 2022–2027 (USD MILLION)
TABLE 207 ASIA PACIFIC: WATERBORNE COATINGS MARKET, BY APPLICATION, 2028–2030 (USD MILLION)
TABLE 208 ASIA PACIFIC: WATERBORNE COATINGS MARKET, BY APPLICATION, 2018–2021 (KILOTON)
TABLE 209 ASIA PACIFIC: WATERBORNE COATINGS MARKET, BY APPLICATION, 2022–2027 (KILOTON)
TABLE 210 ASIA PACIFIC: WATERBORNE COATINGS MARKET, BY APPLICATION, 2028–2030 (KILOTON)
TABLE 211 ASIA PACIFIC: WATERBORNE COATINGS MARKET, BY ARCHITECTURAL APPLICATION, 2018–2021 (USD MILLION)
TABLE 212 ASIA PACIFIC: WATERBORNE COATINGS MARKET, BY ARCHITECTURAL APPLICATION, 2022–2027 (USD MILLION)
TABLE 213 ASIA PACIFIC: WATERBORNE COATINGS MARKET, BY ARCHITECTURAL APPLICATION, 2028–2030 (USD MILLION)
TABLE 214 ASIA PACIFIC: WATERBORNE COATINGS MARKET, BY ARCHITECTURAL APPLICATION, 2018–2021 (KILOTON)
TABLE 215 ASIA PACIFIC: WATERBORNE COATINGS MARKET, BY ARCHITECTURAL APPLICATION, 2022–2027 (KILOTON)
TABLE 216 ASIA PACIFIC: WATERBORNE COATINGS MARKET, BY ARCHITECTURAL APPLICATION, 2028–2030 (KILOTON)
TABLE 217 ASIA PACIFIC: WATERBORNE COATINGS MARKET, BY RESIDENTIAL APPLICATION, 2018–2021 (USD MILLION)
TABLE 218 ASIA PACIFIC: WATERBORNE COATINGS MARKET, BY RESIDENTIAL APPLICATION, 2022–2027 (USD MILLION)
TABLE 219 ASIA PACIFIC: WATERBORNE COATINGS MARKET, BY RESIDENTIAL APPLICATION, 2028–2030 (USD MILLION)
TABLE 220 ASIA PACIFIC: WATERBORNE COATINGS MARKET, BY RESIDENTIAL APPLICATION, 2018–2021 (KILOTON)
TABLE 221 ASIA PACIFIC: WATERBORNE COATINGS MARKET, BY RESIDENTIAL

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About

The global waterborne coatings market size was about XX thousand tons and SXX million, in terms of volume and value,respectively, in 2012.

The Asia-Pacific market was the dominating region for waterborne coatings consumption, both, in terms of volume and value,in 2012, with XX thousand tons and SXX million, respectively.

The global waterborne coatings market is projected to reach about XX thousand tons and SXX million by 2019, at a CAGR of XX% in terms of volume and XX% in terms of value.

The market is largely driven by application especially in architectural coatings applications.

Acrylic is expected to be the fastest growing application with a CAGR of about XX%, in terms of value.

High pricing and raw material price fluctuations were the challenges faced by producers, and waterborne coatings property was a key quality requirement making it a major driver for demand of waterborne coatings in the global market.

China remains the dominating market across the globe, and is projected to grow at a CAGR of about XX% in terms of value for the next five years.

The construction market is expected to show the good growth in the next five years; driven by huge investments in new infrastructure developments, new housing projects, and renovation/repaint of residential and commercial buildings in China, India, and Brazil.

The waterborne coatings industry is moving towards investments as the major waterborne coatings players are focusing to apply a new method for total reduction of VOC and HAP emissions.

Asia-Pacific remains the largest market for waterborne coatings in terms of volume, followed by Western Europe and North America.

Asia-Pacific market continues to be the key growth area due to its consumption, followed by Western

Europe due to its increasing demand for variety of applications of waterborne coatings from different end-user industries.

China is the most attractive country for waterborne coatings for the next five years growing with an estimated XX% CAGR, in terms of volume.

The introduction of waterborne acrylic (latex) technology, the commercial coatings manufacturers found an alternative to traditional solvent borne alkyd chemistries that had been the mainstay of the coatings industry in the past few decades.

The chemistry of Waterborne coatings offers significant advantages to both manufacturers and end users of coatings, including easier clean-up and lower VOC content when compared to solvent borne alkyds, which required significant amounts of organic solvent additives during the manufacturing process.

So the demand for the waterborne alkyd paints is estimated to grow at a CAGR of about XX % by volume from 2014 to 2019 mainly due to their increasing demand in the general finishing, industrial, and domestic applications.

Major companies in this industry are coming up with water-based PVDF coating with lower price tag and VOCs down to XX g/L, compared to approximately XX g/L in current waterborne coatings formulations based on the resins.

The waterborne dispersion coatings are found to be used in projects where air quality is of paramount concern - for exteriors of hospitals or high-rise residential buildings where solvent odors can be conveyed inside by means of ventilation, or in urban areas such as Southern California where tight limits on VOC emissions are in place and are likely to get even tighter.

So, the PVDF coatings segment is driven by coil coatings and also due to its self cleaning property; that is the PVDF coatings contains special pigmentations that help in keeping the roofs and walls dirt free.

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