

Metal Surface Treatment Chemicals Market Forecasts to 2034 – Global Analysis By Chemical Type (Cleaners, Conversion Coatings, Plating Chemicals, Passivation Chemicals and Other Chemical Types), Treatment Process, Metal Type, Function, End User, and Geography

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Abstracts

According to Statistics MRC, the Global Metal Surface Treatment Chemicals Market is accounted for \$15.2 billion in 2026 and is expected to reach \$24.9 billion by 2034 growing at a CAGR of 6.4% during the forecast period. Metal surface treatment chemicals are specialized formulations used to clean, prepare, modify, and protect metal surfaces before manufacturing, coating, assembly, or finishing operations. These chemicals include cleaners, degreasers, pickling agents, phosphating solutions, passivation chemicals, conversion coatings, plating chemicals, and pretreatment formulations that improve corrosion resistance, coating adhesion, durability, and surface quality. Metal surface treatment chemicals are widely used in automotive, aerospace, electronics, construction, and industrial manufacturing. Increasing demand for durable metal components and advanced manufacturing processes is driving growth in the metal surface treatment chemicals market worldwide.

Market Dynamics:

Driver:

Rising demand for corrosion protection

Metal surface treatment chemicals clean, prepare, coat, and protect metal surfaces

before manufacturing or finishing processes. They improve corrosion resistance, coating adhesion, and the overall durability of metal components. Growing production in the automotive, aerospace, construction, and industrial equipment sectors is increasing the use of surface treatment solutions. Manufacturers are focusing on extending product lifespan and improving component performance. Technological advancements are also enhancing the efficiency of modern treatment chemistries. These trends continue to support steady market expansion.

Restraint:

Hazardous chemical handling requirements

Many surface treatment chemicals require specialized storage, transportation, handling, and disposal procedures to ensure workplace and environmental safety. These requirements increase operational complexity for manufacturers and end users. Companies must invest in safety equipment and employee training programs. Compliance with occupational health regulations also adds to operating costs. Smaller manufacturers may face greater implementation challenges. These factors can limit the adoption of certain chemical formulations.

Opportunity:

Eco-friendly surface treatment chemistries

Manufacturers are developing low-toxicity and environmentally responsible formulations that deliver effective surface protection while reducing hazardous emissions. These products support regulatory compliance and sustainable manufacturing practices. Demand for chromium-free and phosphate-free technologies is increasing across multiple industries. Continuous research is improving the performance of environmentally friendly alternatives. Sustainability goals are encouraging greater investment in green chemical innovation. This transition is opening new avenues for market growth.

Threat:

Restrictions on hazardous substances

Governments are strengthening regulations on chemicals that present risks to human health and the environment. These restrictions require manufacturers to reformulate

products and replace conventional treatment chemicals with safer alternatives. Regulatory changes may increase research and compliance costs. Product approvals can also become more time-consuming. Companies must continuously adapt to evolving environmental standards. These regulatory pressures are reshaping product development strategies across the industry.

Covid-19 Impact:

The COVID-19 pandemic temporarily disrupted manufacturing operations, industrial production, and global chemical supply chains. Lower activity in automotive, aerospace, and metal fabrication industries reduced short-term demand for surface treatment chemicals during the initial stages of the pandemic. As manufacturing gradually recovered, investments in industrial production and infrastructure projects restored market demand. Supply chains became more resilient through diversified sourcing strategies. Industrial output continued improving across major economies. The market regained momentum as manufacturing activity returned to pre-pandemic levels.

The cleaners segment is expected to be the largest during the forecast period

The cleaners segment is expected to account for the largest market share during the forecast period as surface cleaning is an essential first step before coating, plating, painting, welding, or other metal finishing processes. Cleaners effectively remove oils, grease, dirt, oxides, and contaminants that affect treatment quality. Nearly every metal processing operation requires effective cleaning solutions. Continuous improvements in cleaning formulations are enhancing process efficiency and surface preparation quality.

The wear resistance segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the wear resistance segment is predicted to witness the highest growth rate due to increasing demand for durable metal components used in automotive, industrial machinery, mining, and aerospace applications. Advanced treatment chemicals improve surface hardness and reduce friction under demanding operating conditions. Manufacturers are seeking longer equipment service life and lower maintenance costs. New coating technologies are further enhancing wear protection capabilities.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share owing to rapid industrial manufacturing growth. China dominates the regional market with its extensive automotive, electronics, and metal fabrication industries, while India is expanding industrial manufacturing through large-scale infrastructure and production investments. Japan continues leading in advanced metal finishing technologies, and South Korea supports strong demand from semiconductor, automotive, and shipbuilding industries. Continuous industrial expansion and manufacturing capacity additions are sustaining regional leadership.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR driven by expanding electronics manufacturing. China continues investing in high-value manufacturing, while Vietnam is rapidly developing electronics production capabilities. India is attracting new investments in automotive and engineering industries, and Malaysia is strengthening its precision manufacturing and metal processing sectors. Growing industrialization and increasing exports are supporting strong demand for advanced surface treatment chemicals.

Key players in the market

Some of the key players in Metal Surface Treatment Chemicals Market include Coventya Holding SAS, Atotech Deutschland GmbH, Chemetall GmbH, Henkel AG & Co. KGaA, BASF SE, PPG Industries, Inc., Quaker Houghton, Element Solutions Inc., NOF Corporation, Nihon Parkerizing Co., Ltd., Platform Specialty Products Corporation, Axalta Coating Systems Ltd., MacDermid Enthone Industrial Solutions, Dow Inc. and Nouryon Chemicals Holding B.V.

Key Developments:

In March 2026, Coventya Holding SAS expanded its global industrial footprint following its full integration into MacDermid Enthone. The company introduced a new line of eco-friendly, hexavalent chromium-free passivation chemicals engineered for automotive and fastener applications.

In February 2026, BASF SE launched an eco-friendly product portfolio of bio-based scale inhibitors designed for high-salinity oilfield production environments. The specialized chemical formulations effectively reduce mineral fouling while meeting stringent environmental compliance standards across global offshore energy drilling

platforms.

Chemical Types Covered:

Cleaners

Conversion Coatings

Plating Chemicals

Passivation Chemicals

Other Chemical Types

Treatment Processes Covered:

Cleaning

Surface Conditioning

Metal Finishing

Surface Protection

Other Treatment Processes

Metal Types Covered:

Steel

Aluminum

Copper

Zinc

Other Metal Types

Functions Covered:

Corrosion Protection

Adhesion Enhancement

Wear Resistance

Decorative Finishing

Other Functions

End Users Covered:

Automotive Manufacturers

Aerospace Manufacturers

Industrial Equipment Manufacturers

Electronics Manufacturers

Other End Users

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

Contents

1 EXECUTIVE SUMMARY

- 1.1 Market Snapshot and Key Highlights
- 1.2 Growth Drivers, Challenges, and Opportunities
- 1.3 Competitive Landscape Overview
- 1.4 Strategic Insights and Recommendations

2 RESEARCH FRAMEWORK

- 2.1 Study Objectives and Scope
- 2.2 Stakeholder Analysis
- 2.3 Research Assumptions and Limitations
- 2.4 Research Methodology
 - 2.4.1 Data Collection (Primary and Secondary)
 - 2.4.2 Data Modeling and Estimation Techniques
 - 2.4.3 Data Validation and Triangulation
 - 2.4.4 Analytical and Forecasting Approach

3 MARKET DYNAMICS AND TREND ANALYSIS

- 3.1 Market Definition and Structure
- 3.2 Key Market Drivers
- 3.3 Market Restraints and Challenges
- 3.4 Growth Opportunities and Investment Hotspots
- 3.5 Industry Threats and Risk Assessment
- 3.6 Technology and Innovation Landscape
- 3.7 Emerging and High-Growth Markets
- 3.8 Regulatory and Policy Environment
- 3.9 Impact of COVID-19 and Recovery Outlook

4 COMPETITIVE AND STRATEGIC ASSESSMENT

- 4.1 Porter's Five Forces Analysis
 - 4.1.1 Supplier Bargaining Power
 - 4.1.2 Buyer Bargaining Power
 - 4.1.3 Threat of Substitutes
 - 4.1.4 Threat of New Entrants

- 4.1.5 Competitive Rivalry
- 4.2 Market Share Analysis of Key Players
- 4.3 Product Benchmarking and Performance Comparison

5 GLOBAL METAL SURFACE TREATMENT CHEMICALS MARKET, BY CHEMICAL TYPE

- 5.1 Cleaners
- 5.2 Conversion Coatings
- 5.3 Plating Chemicals
- 5.4 Passivation Chemicals
- 5.5 Other Chemical Types

6 GLOBAL METAL SURFACE TREATMENT CHEMICALS MARKET, BY TREATMENT PROCESS

- 6.1 Cleaning
- 6.2 Surface Conditioning
- 6.3 Metal Finishing
- 6.4 Surface Protection
- 6.5 Other Treatment Processes

7 GLOBAL METAL SURFACE TREATMENT CHEMICALS MARKET, BY METAL TYPE

- 7.1 Steel
- 7.2 Aluminum
- 7.3 Copper
- 7.4 Zinc
- 7.5 Other Metal Types

8 GLOBAL METAL SURFACE TREATMENT CHEMICALS MARKET, BY FUNCTION

- 8.1 Corrosion Protection
- 8.2 Adhesion Enhancement
- 8.3 Wear Resistance
- 8.4 Decorative Finishing
- 8.5 Other Functions

9 GLOBAL METAL SURFACE TREATMENT CHEMICALS MARKET, BY END USER

- 9.1 Automotive Manufacturers
- 9.2 Aerospace Manufacturers
- 9.3 Industrial Equipment Manufacturers
- 9.4 Electronics Manufacturers
- 9.5 Other End Users

10 GLOBAL METAL SURFACE TREATMENT CHEMICALS MARKET, BY GEOGRAPHY

- 10.1 North America
 - 10.1.1 United States
 - 10.1.2 Canada
 - 10.1.3 Mexico
- 10.2 Europe
 - 10.2.1 United Kingdom
 - 10.2.2 Germany
 - 10.2.3 France
 - 10.2.4 Italy
 - 10.2.5 Spain
 - 10.2.6 Netherlands
 - 10.2.7 Belgium
 - 10.2.8 Sweden
 - 10.2.9 Switzerland
 - 10.2.10 Poland
 - 10.2.11 Rest of Europe
- 10.3 Asia Pacific
 - 10.3.1 China
 - 10.3.2 Japan
 - 10.3.3 India
 - 10.3.4 South Korea
 - 10.3.5 Australia
 - 10.3.6 Indonesia
 - 10.3.7 Thailand
 - 10.3.8 Malaysia
 - 10.3.9 Singapore
 - 10.3.10 Vietnam
 - 10.3.11 Rest of Asia Pacific

10.4 South America

10.4.1 Brazil

10.4.2 Argentina

10.4.3 Colombia

10.4.4 Chile

10.4.5 Peru

10.4.6 Rest of South America

10.5 Rest of the World (RoW)

10.5.1 Middle East

10.5.1.1 Saudi Arabia

10.5.1.2 United Arab Emirates

10.5.1.3 Qatar

10.5.1.4 Israel

10.5.1.5 Rest of Middle East

10.5.2 Africa

10.5.2.1 South Africa

10.5.2.2 Egypt

10.5.2.3 Morocco

10.5.2.4 Rest of Africa

11 STRATEGIC MARKET INTELLIGENCE

11.1 Industry Value Network and Supply Chain Assessment

11.2 White-Space and Opportunity Mapping

11.3 Product Evolution and Market Life Cycle Analysis

11.4 Channel, Distributor, and Go-to-Market Assessment

12 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES

12.1 Mergers and Acquisitions

12.2 Partnerships, Alliances, and Joint Ventures

12.3 New Product Launches and Certifications

12.4 Capacity Expansion and Investments

12.5 Other Strategic Initiatives

13 COMPANY PROFILES

13.1 Coventya Holding SAS

13.2 Atotech Deutschland GmbH

- 13.3 Chemetall GmbH
- 13.4 Henkel AG & Co. KGaA
- 13.5 BASF SE
- 13.6 PPG Industries, Inc.
- 13.7 Quaker Houghton
- 13.8 Element Solutions Inc.
- 13.9 NOF Corporation
- 13.10 Nihon Parkerizing Co., Ltd.
- 13.11 Platform Specialty Products Corporation
- 13.12 Axalta Coating Systems Ltd.
- 13.13 MacDermid Enthone Industrial Solutions
- 13.14 Dow Inc.
- 13.15 Nouryon Chemicals Holding B.V.

List Of Tables

LIST OF TABLES

Table 1 Global Metal Surface Treatment Chemicals Market Outlook, By Region (2023–2034) (\$MN)

Table 2 Global Metal Surface Treatment Chemicals Market, By Chemical Type (2023–2034) (\$MN)

Table 3 Global Metal Surface Treatment Chemicals Market, By Cleaners (2023–2034) (\$MN)

Table 4 Global Metal Surface Treatment Chemicals Market, By Conversion Coatings (2023–2034) (\$MN)

Table 5 Global Metal Surface Treatment Chemicals Market, By Plating Chemicals (2023–2034) (\$MN)

Table 6 Global Metal Surface Treatment Chemicals Market, By Passivation Chemicals (2023–2034) (\$MN)

Table 7 Global Metal Surface Treatment Chemicals Market, By Other Chemical Types (2023–2034) (\$MN)

Table 8 Global Metal Surface Treatment Chemicals Market, By Treatment Process (2023–2034) (\$MN)

Table 9 Global Metal Surface Treatment Chemicals Market, By Cleaning (2023–2034) (\$MN)

Table 10 Global Metal Surface Treatment Chemicals Market, By Surface Conditioning (2023–2034) (\$MN)

Table 11 Global Metal Surface Treatment Chemicals Market, By Metal Finishing (2023–2034) (\$MN)

Table 12 Global Metal Surface Treatment Chemicals Market, By Surface Protection (2023–2034) (\$MN)

Table 13 Global Metal Surface Treatment Chemicals Market, By Other Treatment Processes (2023–2034) (\$MN)

Table 14 Global Metal Surface Treatment Chemicals Market, By Metal Type (2023–2034) (\$MN)

Table 15 Global Metal Surface Treatment Chemicals Market, By Steel (2023–2034) (\$MN)

Table 16 Global Metal Surface Treatment Chemicals Market, By Aluminum (2023–2034) (\$MN)

Table 17 Global Metal Surface Treatment Chemicals Market, By Copper (2023–2034) (\$MN)

Table 18 Global Metal Surface Treatment Chemicals Market, By Zinc (2023–2034)

(\$MN)

Table 19 Global Metal Surface Treatment Chemicals Market, By Other Metal Types
(2023–2034) (\$MN)

Table 20 Global Metal Surface Treatment Chemicals Market, By Function (2023–2034)
(\$MN)

Table 21 Global Metal Surface Treatment Chemicals Market, By Corrosion Protection
(2023–2034) (\$MN)

Table 22 Global Metal Surface Treatment Chemicals Market, By Adhesion
Enhancement (2023–2034) (\$MN)

Table 23 Global Metal Surface Treatment Chemicals Market, By Wear Resistance
(2023–2034) (\$MN)

Table 24 Global Metal Surface Treatment Chemicals Market, By Decorative Finishing
(2023–2034) (\$MN)

Table 25 Global Metal Surface Treatment Chemicals Market, By Other Functions
(2023–2034) (\$MN)

Table 26 Global Metal Surface Treatment Chemicals Market, By End User (2023–2034)
(\$MN)

Table 27 Global Metal Surface Treatment Chemicals Market, By Automotive
Manufacturers (2023–2034) (\$MN)

Table 28 Global Metal Surface Treatment Chemicals Market, By Aerospace
Manufacturers (2023–2034) (\$MN)

Table 29 Global Metal Surface Treatment Chemicals Market, By Industrial Equipment
Manufacturers (2023–2034) (\$MN)

Table 30 Global Metal Surface Treatment Chemicals Market, By Electronics
Manufacturers (2023–2034) (\$MN)

Table 31 Global Metal Surface Treatment Chemicals Market, By Other End Users
(2023–2034) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Rest of the World
(RoW) are also represented in the same manner as above.

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