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Scratch-Resistant Coating Market Forecasts to 2032 – Global Analysis By Product Type (Polyurethane (PU) Coatings, Acrylic Coatings, Epoxy Coatings, Ceramic & Inorganic Coatings, Hybrid Coatings, and Other Product Types), Substrate Type (Plastics, Glass, Metals, Wood, and Other Substrate Types), Technology, End User, and By Geography

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Abstracts

According to Stratistics MRC, the Global Scratch-Resistant Coating Market is accounted for $7.5 billion in 2025 and is expected to reach $13.1 billion by 2032, growing at a CAGR of 8.2% during the forecast period. The scratch-resistant coating covers protective surface treatments applied to glass, plastics, metals, and electronic displays to improve durability and appearance. It serves the automotive, consumer electronics, construction, and eyewear industries. Demand is increasing because people want stronger consumer devices, nicer car interiors, products that last longer, better looks, and more lightweight plastics that need protection to work well.

Market Dynamics:

Driver:

Proliferation of touch-screen displays in consumer electronics and automotive interiors

The rapid expansion of high-end display technologies serves as a primary driver for market growth. As smartphones, tablets, and smartwatches become integral to daily life, consumers increasingly demand durable surfaces that maintain optical clarity despite constant physical interaction. Similarly, the automotive industry is shifting toward

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digitized cockpits, replacing traditional buttons with extensive touch-sensitive consoles. Furthermore, the rising adoption of OLED and AMOLED screens necessitates premium protective layers, thereby driving the sustained requirement for high-performance coating solutions across global manufacturing hubs.

Restraint:

High cost of advanced ceramic and hybrid coatings

Advanced ceramic and hybrid coatings utilize specialized chemical precursors and intricate application processes, such as Physical Vapor Deposition (PVD), which elevate the final product price. This premium cost structure often limits their use to luxury automotive segments or flagship electronic devices, making them less accessible for mass-market applications. Additionally, the complexity of the curing process and the need for precision equipment can strain the profit margins of smaller manufacturers. Consequently, cost-sensitive industries may opt for cheaper, albeit less durable, alternatives.

Opportunity:

Innovation in self-healing and oleophobic coating properties

Self-healing coatings are gaining significant traction in the automotive and aerospace sectors, as they can autonomously repair minor surface scratches through thermal or chemical triggers. These innovations significantly reduce maintenance overheads and extend the aesthetic lifespan of products. Additionally, adding oleophobic properties, which help prevent fingerprints and oil marks, is becoming a common need for new mobile screens and medical devices. By investing in R&D for these multifunctional coatings, companies can differentiate their portfolios and capture high-value market segments seeking long-term surface resilience.

Threat:

Fluctuations in the prices of raw materials

Global supply chain disruptions and geopolitical tensions often lead to unpredictable cost spikes for crude oil-based derivatives, which are fundamental to polyurethane and epoxy formulations. Such instability complicates long-term financial planning and may force manufacturers to implement frequent price adjustments, potentially alienating

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price-sensitive clients. Additionally, stringent environmental regulations regarding Volatile Organic Compounds (VOCs) require costly reformulations. These combined factors create a challenging environment where unforeseen procurement expenses can severely impact overall industry profitability.

Covid-19 Impact:

The pandemic had a dual-phase impact on the global market. Initially, nationwide lockdowns and factory closures led to a sharp contraction in automotive production and consumer electronics shipments, causing a temporary slump in coating demand. However, the subsequent "work-from-home" trend spurred a significant surge in laptop and tablet sales, partially offsetting industrial losses. The crisis also brought attention to how crucial it is for public areas to have surfaces that are easy to clean and antimicrobial. As global supply chains gradually stabilized, the market witnessed a resilient recovery fueled by pent-up consumer demand and renewed infrastructure investments.

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

The plastics segment is expected to account for the largest market share during the forecast period. This dominance is primarily attributed to the widespread replacement of glass and metal with lightweight, high-strength polymers in various industries. In the automotive sector, plastic components are favored for reducing vehicle weight and improving fuel efficiency, yet they require specialized scratch-resistant coatings to enhance surface hardness. Additionally, the consumer electronics industry relies heavily on plastic housings for portable devices. Furthermore, advancements in UV-curable coatings for plastic substrates allow for faster production cycles, solidifying this segment's leading position in the global marketplace.

The automotive & transportation segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the automotive & transportation segment is predicted to witness the highest growth rate. Consumer preference for premium vehicle finishes and the increasing integration of electronic displays in modern car interiors drive this rapid expansion. As manufacturers move toward autonomous and electric vehicles, the demand for durable exterior clearcoats and robust interior touch surfaces has intensified. Moreover, the growing automotive aftermarket boosts this segment as owners seek to preserve the resale value of their vehicles through protective coatings.

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Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share. The region's status as the global hub for electronics and automotive manufacturing, particularly in China, Japan, and South Korea, underpins this leadership. The presence of numerous large-scale production facilities and a massive consumer base creates a consistent demand for protective coatings. Additionally, rapid urbanization and significant investments in infrastructure projects across Southeast Asia contribute to the high consumption of industrial and architectural coatings. Furthermore, the availability of cost-effective labor and raw materials continues to attract major global players to establish regional operations.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR. The accelerated growth is fueled by rising disposable incomes and an increasing appetite for luxury consumer goods and passenger vehicles in emerging economies like India and Vietnam. Governments in these nations are also implementing favorable policies to boost domestic manufacturing, which directly benefits the specialty chemicals sector. Moreover, the shift toward sustainable and eco-friendly coating formulations is gaining momentum due to evolving environmental standards in the region. This dynamic economic landscape, coupled with continuous technological integration, ensures that the Asia Pacific region remains the fastest-growing market for scratch-resistant solutions.

Key players in the market

Some of the key players in Scratch-Resistant Coating Market include PPG Industries, Inc., Akzo Nobel N.V., The Sherwin-Williams Company, Axalta Coating Systems Ltd., BASF SE, 3M Company, Henkel AG & Co. KGaA, Kansai Paint Co., Ltd., Nippon Paint Holdings Co., Ltd., RPM International Inc., Jotun A/S, Hempel A/S, Covestro AG, The Dow Chemical Company, and Sika AG.

Key Developments:

In December 2025, Henkel introduced a thin organic coating (TOC) variant with anti fingerprint and scratch resistant properties for coil coated metals.

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In October 2025, Hempel launched Hempaline Defend 430, a solvent free tank lining with long term durability and scratch resistant performance.

In September 2025, PPG launched HI GARD® Non Methanol hard coating for ophthalmic lenses, maintaining durability and scratch resistance while meeting new regulatory standards.

In March 2025, Nippon Paint Marine launched advanced hull coatings for LNG carriers, designed for durability and scratch resistance in marine environments.

Product Types Covered:

- Polyurethane (PU) Coatings
- Acrylic Coatings
- Epoxy Coatings
- Ceramic & Inorganic Coatings
- Hybrid Coatings
- Other Product Types

Substrate Types Covered:

- Plastics
- Glass
- Metals
- Wood
- Other Substrate Types

Technologies Covered:

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- Water-Based Coatings
- Solvent-Based Coatings
- Powder Coatings
- UV-Cured & Electron Beam (EB) Coatings

End Users Covered:

- Automotive & Transportation
- Consumer Electronics
- Optical & Eyewear
- Construction & Architectural
- Aerospace & Defense
- Medical Devices
- Packaging
- Other End Users

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe

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- Germany
- UK
- Italy
- France
- Spain
- Rest of Europe

Asia Pacific

- Japan
- China
- India
- Australia
- New Zealand
- South Korea
- Rest of Asia Pacific

South America

- Argentina
- Brazil
- Chile
- Rest of South America

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Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & 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 2024, 2025, 2026, 2028, and 2032
- 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

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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

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Contents

1 EXECUTIVE SUMMARY

2 PREFACE

2.1 Abstract
2.2 Stake Holders
2.3 Research Scope
2.4 Research Methodology
  2.4.1 Data Mining
  2.4.2 Data Analysis
  2.4.3 Data Validation
  2.4.4 Research Approach
2.5 Research Sources
  2.5.1 Primary Research Sources
  2.5.2 Secondary Research Sources
  2.5.3 Assumptions

3 MARKET TREND ANALYSIS

3.1 Introduction
3.2 Drivers
3.3 Restraints
3.4 Opportunities
3.5 Threats
3.6 Product Analysis
3.7 Technology Analysis
3.8 End User Analysis
3.9 Emerging Markets
3.10 Impact of Covid-19

4 PORTERS FIVE FORCE ANALYSIS

4.1 Bargaining power of suppliers
4.2 Bargaining power of buyers
4.3 Threat of substitutes
4.4 Threat of new entrants
4.5 Competitive rivalry

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5 GLOBAL SCRATCH-RESISTANT COATING MARKET, BY PRODUCT TYPE

5.1 Introduction
5.2 Polyurethane (PU) Coatings
5.3 Acrylic Coatings
5.4 Epoxy Coatings
5.5 Ceramic & Inorganic Coatings
5.6 Hybrid Coatings
5.7 Other Product Types

6 GLOBAL SCRATCH-RESISTANT COATING MARKET, BY SUBSTRATE TYPE

6.1 Introduction
6.2 Plastics
6.3 Glass
6.4 Metals
6.5 Wood
6.6 Other Substrate Types

7 GLOBAL SCRATCH-RESISTANT COATING MARKET, BY TECHNOLOGY

7.1 Introduction
7.2 Water-Based Coatings
7.3 Solvent-Based Coatings
7.4 Powder Coatings
7.5 UV-Cured & Electron Beam (EB) Coatings

8 GLOBAL SCRATCH-RESISTANT COATING MARKET, BY END USER

8.1 Introduction
8.2 Automotive & Transportation
8.3 Consumer Electronics
8.4 Optical & Eyewear
8.5 Construction & Architectural
8.6 Aerospace & Defense
8.7 Medical Devices
8.8 Packaging
8.9 Other End Users

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info@marketpublishers.com

9 GLOBAL SCRATCH-RESISTANT COATING MARKET, BY GEOGRAPHY

9.1 Introduction
9.2 North America
  9.2.1 US
  9.2.2 Canada
  9.2.3 Mexico
9.3 Europe
  9.3.1 Germany
  9.3.2 UK
  9.3.3 Italy
  9.3.4 France
  9.3.5 Spain
  9.3.6 Rest of Europe
9.4 Asia Pacific
  9.4.1 Japan
  9.4.2 China
  9.4.3 India
  9.4.4 Australia
  9.4.5 New Zealand
  9.4.6 South Korea
  9.4.7 Rest of Asia Pacific
9.5 South America
  9.5.1 Argentina
  9.5.2 Brazil
  9.5.3 Chile
  9.5.4 Rest of South America
9.6 Middle East & Africa
  9.6.1 Saudi Arabia
  9.6.2 UAE
  9.6.3 Qatar
  9.6.4 South Africa
  9.6.5 Rest of Middle East & Africa

10 KEY DEVELOPMENTS

10.1 Agreements, Partnerships, Collaborations and Joint Ventures
10.2 Acquisitions & Mergers

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10.3 New Product Launch
10.4 Expansions
10.5 Other Key Strategies

11 COMPANY PROFILING

11.1 PPG Industries, Inc.
11.2 Akzo Nobel N.V.
11.3 The Sherwin-Williams Company
11.4 Axalta Coating Systems Ltd.
11.5 BASF SE
11.6 3M Company
11.7 Henkel AG & Co. KGaA
11.8 Kansai Paint Co., Ltd.
11.9 Nippon Paint Holdings Co., Ltd.
11.10 RPM International Inc.
11.11 Jotun A/S
11.12 Hempel A/S
11.13 Covestro AG
11.14 The Dow Chemical Company
11.15 Sika AG

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List Of Tables

LIST OF TABLES

Table 1 Global Scratch-Resistant Coating Market Outlook, By Region (2024–2032) ($MN)
Table 2 Global Scratch-Resistant Coating Market Outlook, By Product Type (2024–2032) ($MN)
Table 3 Global Scratch-Resistant Coating Market Outlook, By Polyurethane (PU) Coatings (2024–2032) ($MN)
Table 4 Global Scratch-Resistant Coating Market Outlook, By Acrylic Coatings (2024–2032) ($MN)
Table 5 Global Scratch-Resistant Coating Market Outlook, By Epoxy Coatings (2024–2032) ($MN)
Table 6 Global Scratch-Resistant Coating Market Outlook, By Ceramic & Inorganic Coatings (2024–2032) ($MN)
Table 7 Global Scratch-Resistant Coating Market Outlook, By Hybrid Coatings (2024–2032) ($MN)
Table 8 Global Scratch-Resistant Coating Market Outlook, By Other Product Types (2024–2032) ($MN)
Table 9 Global Scratch-Resistant Coating Market Outlook, By Substrate Type (2024–2032) ($MN)
Table 10 Global Scratch-Resistant Coating Market Outlook, By Plastics (2024–2032) ($MN)
Table 11 Global Scratch-Resistant Coating Market Outlook, By Glass (2024–2032) ($MN)
Table 12 Global Scratch-Resistant Coating Market Outlook, By Metals (2024–2032) ($MN)
Table 13 Global Scratch-Resistant Coating Market Outlook, By Wood (2024–2032) ($MN)
Table 14 Global Scratch-Resistant Coating Market Outlook, By Other Substrate Types (2024–2032) ($MN)
Table 15 Global Scratch-Resistant Coating Market Outlook, By Technology (2024–2032) ($MN)
Table 16 Global Scratch-Resistant Coating Market Outlook, By Water-Based Coatings (2024–2032) ($MN)
Table 17 Global Scratch-Resistant Coating Market Outlook, By Solvent-Based Coatings (2024–2032) ($MN)
Table 18 Global Scratch-Resistant Coating Market Outlook, By Powder Coatings

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(2024–2032) ($MN)
Table 19 Global Scratch-Resistant Coating Market Outlook, By UV-Cured & EB Coatings (2024–2032) ($MN)
Table 20 Global Scratch-Resistant Coating Market Outlook, By End User (2024–2032) ($MN)
Table 21 Global Scratch-Resistant Coating Market Outlook, By Automotive & Transportation (2024–2032) ($MN)
Table 22 Global Scratch-Resistant Coating Market Outlook, By Consumer Electronics (2024–2032) ($MN)
Table 23 Global Scratch-Resistant Coating Market Outlook, By Optical & Eyewear (2024–2032) ($MN)
Table 24 Global Scratch-Resistant Coating Market Outlook, By Construction & Architectural (2024–2032) ($MN)
Table 25 Global Scratch-Resistant Coating Market Outlook, By Aerospace & Defense (2024–2032) ($MN)
Table 26 Global Scratch-Resistant Coating Market Outlook, By Medical Devices (2024–2032) ($MN)
Table 27 Global Scratch-Resistant Coating Market Outlook, By Packaging (2024–2032) ($MN)
Table 28 Global Scratch-Resistant Coating Market Outlook, By Other End Users (2024–2032) ($MN)
Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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