

# **Automotive Paints Market - Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Vehicle Type (Passenger Cars, Light Commercial Vehicles and Heavy Commercial Vehicles), By Coat Type (Base Coat, Primer coat, Clear coat and Electro coat), By Technology (Powder coatings, Waterborne coatings and Solvent borne coatings), By Texture Type (Solid Texture and Metallic Texture), By Region & Competition, 2021-2031F**

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## **Abstracts**

The Global Automotive Paints Market is projected to expand from USD 10.72 Billion in 2025 to USD 14.05 Billion by 2031, registering a compound annual growth rate of 4.61%. These specialized liquid or powder coatings are applied to motor vehicle surfaces to provide essential protection against corrosion and environmental weathering while simultaneously enhancing aesthetic appeal. The primary factor driving this market is the consistent increase in global vehicle production, which demands substantial volumes of original equipment manufacturer coatings. This expansion is supported by industrial data; for instance, the European Automobile Manufacturers' Association reported that global car manufacturing totaled 75.5 million units in 2024. Furthermore, the aging global fleet bolsters demand for refinish coatings as vehicle owners increasingly invest in collision repair and maintenance to prolong the longevity of their assets.

However, the market confronts a significant obstacle due to stringent environmental regulations regarding volatile organic compound emissions. Governments across the globe are enforcing rigorous standards that compel manufacturers to transition from

traditional solvent-borne systems to eco-friendly water-borne alternatives. This regulatory pressure necessitates substantial capital investment in research and development to reformulate products without compromising performance, thereby straining operational margins and creating technical hurdles that could retard broader market expansion.

## **Market Driver**

The rapid expansion of the electric vehicle manufacturing sector serves as a primary catalyst for market development, necessitating the formulation of functional surface solutions. Unlike internal combustion engines, electric vehicles require specific coatings that facilitate thermal management for battery packs and ensure radar transparency for autonomous driving sensors. This technological shift drives volume growth as automakers aggressively scale production to meet adoption targets. As noted by the International Energy Agency in the 'Global EV Outlook 2024' released in April 2024, electric car sales reached nearly 14 million in 2023, representing a significant increase that directly correlates with the rising procurement of specialized automotive coatings.

Industrialization and market expansion in emerging economies further accelerate the global consumption of automotive paints, particularly within the Asia-Pacific region. As these nations strengthen their manufacturing infrastructure, there is a sustained increase in the output of both passenger and commercial vehicles, creating consistent revenue streams for coating suppliers. According to the China Association of Automobile Manufacturers in January 2024, automobile production in China exceeded 30.16 million units in 2023, underscoring the critical role of developing markets in sustaining industrial throughput. This regional expansion contributes to the financial health of major suppliers; for instance, Axalta Coating Systems reported net sales of \$5.2 billion for the full year 2023, reflecting broader recovery and demand within the mobility coatings landscape.

## **Market Challenge**

Stringent environmental regulations regarding volatile organic compound emissions constitute a formidable impediment to the progress of the global automotive paints market. Regulatory bodies globally are enforcing strict compliance standards that mandate a shift from high-performance solvent-borne systems to water-borne alternatives. This transition forces manufacturers to allocate substantial capital toward research and development to ensure these eco-friendly reformulations meet the rigorous durability and aesthetic requirements of the automotive industry. Consequently,

these mandatory investments divert critical resources away from capacity expansion and market penetration strategies.

The economic strain of this industry-wide overhaul is evident in key manufacturing regions where the scale of operations amplifies the cost of compliance. For instance, according to the German Paint and Printing Ink Industry Association, in 2024, the turnover for automotive series production coatings in Germany stood at 600 million euros. Transforming production lines of this magnitude to align with new emission protocols involves significant infrastructure costs and technical complexities. This financial burden compresses profit margins and restricts the ability of manufacturers to invest in growth, thereby directly hampering the overall expansion of the market.

## **Market Trends**

The shift toward bio-based and renewable ingredients is fundamentally reshaping the automotive paints market as manufacturers increasingly substitute fossil-fuel-derived resins with sustainable alternatives like biomass and plant-based feedstocks. This trend is driven by the urgent need to decarbonize the entire automotive supply chain, pushing coating suppliers to develop formulations that reduce embodied carbon without sacrificing durability or finish quality. By integrating renewable materials such as rapeseed or corn-based derivatives, companies are directly addressing Scope 3 emission targets set by global automakers. According to PPG Industries in its '2023 Sustainability Report' from May 2024, the company reported that 44% of its total sales were generated from sustainably advantaged products, including low-carbon and bio-based solutions specifically utilized in automotive manufacturing processes.

The rise of two-tone and custom color personalization is simultaneously altering market dynamics, fueled by growing consumer demand for vehicles that exhibit distinctiveness and individuality through factory-applied styling. Automakers are responding by offering expanded custom aesthetic options, such as contrasting roof colors and advanced effect finishes that utilize specialized pigments to create unique depth, shimmer, or matte appearances. This move towards high-value visual differentiation allows OEMs to command premium pricing and strengthens brand identity in a competitive global landscape. According to Axalta Coating Systems in the '2024 Global Automotive Color Popularity Report' from August 2025, the global market share of dynamic effect finishes, which include pearlescent and special texture coatings, increased to 17%, highlighting the shifting consumer preference for sophisticated and personalized vehicle exteriors.

## **Key Market Players**

Berger Paints

BASF SE

PPG Industries Inc.

Axalta Coatings System LLC

Valspar Corporation

Arkema SA

Solvay SA

Nippon Paint Holdings Co., Ltd

Kansai Paint Co. Ltd.

Akzonobel N.V.

## **Report Scope**

In this report, the Global Automotive Paints Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Automotive Paints Market, By Vehicle Type

Passenger Cars

Light Commercial Vehicles and Heavy Commercial Vehicles

Automotive Paints Market, By Coat Type

Base Coat

Primer coat

Clear coat and Electro coat

Automotive Paints Market, By Technology

Powder coatings

Waterborne coatings and Solvent borne coatings

Automotive Paints Market, By Texture Type

Solid Texture and Metallic Texture

Automotive Paints Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

## **Competitive Landscape**

Company Profiles: Detailed analysis of the major companies present in the Global Automotive Paints Market.

## **Available Customizations:**

Global Automotive Paints Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## **Company Information**

Detailed analysis and profiling of additional market players (up to five).

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