

Coating Additives Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Acrylic Coating Additives and Others), By Function (Anti-Foaming, Biocides, and Others), By Formulation (Water-Borne, Powder-Based and Solvent-Borne), By Application (Automotive, Wood & Furniture, and Others), By Region & Competition, 2021-2031F

<https://marketpublishers.com/r/C26399871969EN.html>

Date: January 2026

Pages: 185

Price: US\$ 4,500.00 (Single User License)

ID: C26399871969EN

Abstracts

The Global Coating Additives Market is anticipated to expand from USD 9.78 Billion in 2025 to USD 13.77 Billion by 2031, reflecting a CAGR of 5.87%. These specialized chemical agents are integral to paint formulations, designed to optimize processing characteristics and enhance final attributes such as durability, flow, and rheology. The industry is primarily bolstered by sustained growth within the global automotive and construction sectors, both of which require high-performance surface protection to ensure the longevity of vehicles and infrastructure. This fundamental industrial necessity guarantees a continued demand for agents that improve the application and lifespan of finishes. Highlighting the scale of consumption driving this need, the World Paint & Coatings Industry Association reported that the global paints and coatings market achieved a sales value of USD 188.8 billion in 2024.

Despite this strong demand, market expansion is significantly hindered by the persistent volatility of raw material costs. Manufacturers frequently face unpredictable price fluctuations for essential feedstocks and petrochemical derivatives used in additive synthesis, a situation that creates uncertainty in pricing strategies and compresses operating margins. This financial instability adds complexity to supply chain

management and creates obstacles for the investment necessary to develop compliant, high-performance solutions that meet evolving industry standards.

Market Driver

The rapid expansion of the global construction and infrastructure industry serves as the primary engine fueling the coating additives market. As urbanization accelerates, there is a critical necessity for high-durability coatings to shield industrial, commercial, and residential structures from corrosion and weathering. In this context, additives are indispensable, imparting essential qualities such as UV protection, water resistance, and enhanced adhesion that prolong the maintenance intervals of infrastructure projects. The immense contribution of this sector to demand is quantified by recent forecasts; according to the 'Global Powers of Construction' report by Deloitte in July 2025, the global construction market is projected to rise from US\$11.39 trillion in 2024 to US\$16.11 trillion by 2030. Such significant capital allocation toward physical assets directly correlates with increased consumption of protective coatings and their required performance-enhancing ingredients.

Simultaneously, rising production and demand within the automotive and transportation sectors significantly influence market dynamics. Automakers are increasingly concentrating on surface protection and aesthetic differentiation, driving the need for sophisticated additives that improve leveling, pigment dispersion, and scratch resistance. This focus on specific finish qualities is highlighted by recent trends; according to BASF's 'Color Report 2024 for Automotive OEM Coatings' released in January 2025, achromatic colors like white, black, gray, and silver comprised nearly 80% of the automotive market share in 2024. Meeting the precise physical and optical standards for these dominant finishes necessitates advanced additive packages. Reflecting the broader economic impact of these industrial drivers, the American Coatings Association valued the global paint and coatings industry at USD 202 billion in 2025, underscoring the substantial ecosystem relying on these chemical inputs.

Market Challenge

The persistent volatility of raw material costs represents a substantial barrier to the progress of the Global Coating Additives Market. Since additives are predominantly synthesized from petrochemical feedstocks, their production expenses are highly sensitive to geopolitical instability and crude oil price dynamics. When input costs oscillate unpredictably, manufacturers encounter difficulties in maintaining stable pricing structures, a situation that inevitably erodes operating margins and generates financial

hesitancy. This instability complicates long-term strategic planning and compels companies to either absorb the costs or pass them down the supply chain, often resulting in reduced demand.

Consequently, this economic pressure directly hampers market expansion by restricting capital availability for production growth and research. The impact of such cost-related stress is evident in industry performance metrics; according to the American Coatings Association, it was reported in 2024 that the architectural coatings segment experienced a 4.4% decline in value during the previous year, a contraction attributed largely to escalating raw material prices and severe supply chain constraints. Such market contractions in the downstream coatings industry naturally diminish the consumption of essential additives, thereby stalling the overall growth trajectory of the sector.

Market Trends

The transition toward renewable and bio-based feedstock materials is fundamentally reshaping additive synthesis as manufacturers aim to decouple production from fossil-fuel dependencies. Chemical suppliers are utilizing plant-based precursors and biomass balance approaches to develop rheology modifiers and dispersants that offer performance identical to their petrochemical counterparts while significantly lowering embodied carbon. This strategic shift is driven by the necessity to reduce Scope 3 emissions and satisfy the environmental criteria of downstream OEMs who demand verifiable reductions in product carbon footprints. The scale of this industrial commitment is illustrated by recent investment figures; according to the 'BASF Report 2024' released in March 2025, the company allocated approximately \$0.9 billion of its annual research and development expenditure toward potential Sustainable-Future Solutions, reflecting a prioritized focus on renewable technologies.

Concurrently, the focus on APEO-free and zero-VOC formulation technologies is accelerating as stringent environmental regulations compel the elimination of hazardous substances from coating lifecycles. Formulators are aggressively replacing traditional solvent-borne agents with low-emission and alkylphenol ethoxylate (APEO)-free alternatives to comply with indoor safety protocols and tightening air quality standards. This regulatory pressure mandates the adoption of compliant chemistries that maintain efficacy without releasing volatile organic compounds, forcing additive producers to re-engineer molecular structures for water-borne compatibility. Highlighting the commercial adoption of this compliance-driven strategy, PPG's '2024 Sustainability Report' from May 2025 noted that 41% of the company's total sales were generated from sustainably advantaged products, underscoring the market preference for environmentally benign

solutions.

Key Market Players

Arkema SA

AkzoNobel N.V.

Momentive Performance Materials Inc.

BYK-Chemie GmbH

Ashland Inc.

Elementis PLC

Evonik Industries AG

Lonza Group Ltd.

Angus Chemical Company

Fuji Silysia Chemical, Ltd.

Report Scope

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

Coating Additives Market, By Type

Acrylic Coating Additives

Others

Coating Additives Market, By Function

Anti-Foaming

Biocides

Others

Coating Additives Market, By Formulation

Water-Borne

Powder-Based

Solvent-Borne

Coating Additives Market, By Application

Automotive

Wood & Furniture

Others

Coating Additives 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 Coating Additives Market.

Available Customizations:

Global Coating Additives 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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