

# **Surface Treatment Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Chemical Type (Cleaners, Plating Chemicals, Conversion Coatings), By Base Material (Metals, Plastic, Others), By End-use Industry (Transportation, Construction, Oil & Gas Pipeline, Industrial Machinery, Others), By Region & Competition, 2021-2031F**

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## **Abstracts**

The Global Surface Treatment Market is projected to expand from USD 8.37 Billion in 2025 to USD 11.75 Billion by 2031, registering a CAGR of 5.82%. This industry covers a wide array of industrial processes, such as conversion coating, cleaning, and plating, which are utilized to modify surface characteristics for improved wear protection, corrosion resistance, and visual aesthetics. Market growth is principally supported by the rising requirement for lightweight materials within the aerospace and automotive sectors, where superior finishing is critical for the performance and durability of magnesium and aluminum alloys. Furthermore, the booming electronics sector necessitates advanced surface engineering to maximize conductivity and ensure component reliability throughout intricate global supply chains.

However, the market faces considerable headwinds due to stringent environmental mandates and regional economic instability, both of which can disrupt industrial output and escalate compliance expenses. These volatility factors have resulted in inconsistent demand across major manufacturing centers. For example, underscoring these economic challenges, the Zentralverband Oberflächentechnik (ZVO) reported in 2024 that member companies in the surface technology sector anticipated a 12 percent decline in turnover attributed to weak market conditions. Such financial strains highlight the obstacles companies encounter in sustaining growth momentum within a difficult

economic and regulatory environment.

### **Market Driver**

A key catalyst propelling the Global Surface Treatment Market is the expansion of maintenance operations in the aerospace and defense sectors, which require sophisticated finishing solutions to endure harsh environmental conditions. Manufacturers increasingly depend on high-performance coatings to guarantee the structural integrity and lifespan of components critical to military and commercial aircraft. This demand is driven by a strong resurgence in global air travel and increased maintenance, repair, and overhaul (MRO) activities that call for specialized treatments for wear resistance and corrosion protection. This trend is substantiated by PPG Industries, which noted in its 'Fourth Quarter and Full-Year 2024 Financial Results' from January 2025 that its Performance Coatings segment achieved 4 percent organic sales growth, largely due to record sales in its aerospace coatings business.

Additionally, technological breakthroughs in plasma treatments and nanotechnology are transforming the market by providing durability and adhesion superior to traditional methods. Innovations like thermal spray and physical vapor deposition (PVD) allow for the development of harder, thinner, and more eco-friendly surface layers, which are vital for medical devices and precision engineering. These advancements enhance product performance while improving operational efficiency, as demonstrated by OC Oerlikon's '2024 Full Year Results' from February 2025, where the Surface Solutions division posted an 18.0 percent operational EBITDA margin driven by effective pricing and technology strategies. Further illustrating the sector's financial scale, Axalta Coating Systems reported record full-year net sales of \$5.3 billion in its February 2025 results, reflecting sustained demand for industrial surface solutions.

### **Market Challenge**

The Global Surface Treatment Market contends with significant impediments arising from the combination of rigorous environmental regulations and regional economic instability. This dual challenge restricts market expansion by elevating operational costs and disrupting industrial production workflows. Consequently, manufacturers are forced to allocate substantial capital toward emission control systems and regulatory compliance rather than focusing on market development or capacity expansion. Moreover, economic volatility in primary regions generates unpredictable demand cycles, complicating efforts by surface treatment providers to forecast revenue accurately or maintain steady production schedules.

The consequences of this instability are visible in the contraction of core manufacturing sectors that fuel demand for surface finishing. Data from the VDMA (Mechanical Engineering Industry Association) reveals that in 2024, price-adjusted production output in the EU machinery and equipment manufacturing sector declined by 7 percent. This reduction in industrial output directly lowers the volume of components necessitating cleaning, coating, and plating. As a result, the market faces a scenario where diminishing downstream demand intersects with rising regulatory expenses, severely compressing profit margins and stalling the industry's overall financial momentum.

## Market Trends

The adoption of robotic and automated surface finishing systems is redefining the competitive landscape as manufacturers aim to improve process consistency and alleviate labor shortages. In contrast to manual application, automated cells provide uniform coating thickness and precise repeatability, which are essential for the high-volume production of industrial and automotive components. This shift is further motivated by safety mandates to remove operators from hazardous environments involving chemical plating and spray processes. Validating the increased investment in this area, the Durr Group reported in its 'Annual Report 2024' from March 2025 that its Application Technology division, focused on robotic painting and sealing, saw a 12.3 percent year-over-year rise in order intake, totaling \$808.3 million.

Simultaneously, the move toward sustainable and bio-based chemical formulations is accelerating as a direct response to tightening global environmental frameworks such as RoHS and REACH. The industry is actively transitioning away from toxic substances like hexavalent chromium in favor of eco-friendly trivalent alternatives and bio-derived cleaning agents that offer comparable performance with a significantly smaller ecological footprint. This trend is especially prominent in the electronics and industrial sectors, where compliance is a requirement for supply chain integration. The financial viability of this green transition is underscored by Element Solutions Inc, which reported in its 'Fourth Quarter and Full Year 2024 Financial Results' from February 2025 that its Electronics segment achieved a 16 percent increase in adjusted EBITDA on a constant currency basis, driven by advanced sustainable metallization chemistries.

## Key Market Players

PPG Industries, Inc.

The Sherwin-Williams Company

AkzoNobel N.V.

BASF SE

Henkel AG & Co. KGaA

Axalta Coating Systems Ltd.

RPM International Inc.

Jotun A/S

Kansai Paint Co., Ltd.

Nippon Paint Holdings Co., Ltd.

## **Report Scope**

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

### Surface Treatment Market, By Chemical Type

Cleaners

Plating Chemicals

Conversion Coatings

### Surface Treatment Market, By Base Material

Metals

Plastic

Others

### Surface Treatment Market, By End-use Industry

Transportation

Construction

Oil & Gas Pipeline

Industrial Machinery

Others

### Surface Treatment 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 Surface Treatment Market.

## **Available Customizations:**

Global Surface Treatment 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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