

# **Composite Coatings Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Technique (Laser Melt Injection, Brazing, Electroless Plating, Others), By Application (Anti-Corrosion, UV Protection, Thermal Protection, Others), By End User (Transportation, Aerospace & Defense, Industrial, Oil & Gas, Others), By Region and Competition**

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## **Abstracts**

The Global Composite Coatings Market achieved a valuation of USD 1,289.12 million in 2022 and is poised for robust growth in the forecast period, with a projected Compound Annual Growth Rate (CAGR) of 6.13% through 2028. The escalating demand for composite coatings with enhanced mechanical properties, including corrosion resistance, abrasion resistance, and wear resistance, is steadily on the rise. This demand surge can be attributed to the increasing utilization of high-performance and lightweight materials across diverse industries.

The automotive industry, in particular, relies extensively on composite coatings to augment vehicle fuel efficiency. These coatings have the capacity to reduce weight and enhance fuel economy, making them a driving force for substantial revenue growth in the automotive sector during the forecast period. Furthermore, composite coatings offer exceptional wear and tear resistance, thereby extending the lifespan of vehicle components. This advantage is especially significant given the growing popularity of electric vehicles (EVs), which depend on lightweight parts for optimal performance. Consequently, the demand for composite coatings is expected to experience significant growth within the EV industry.

The aerospace sector is another noteworthy consumer of composite coatings due to their ability to enhance the performance of aircraft components. These coatings provide heightened resistance to corrosion, erosion, and fatigue, effectively prolonging the life of critical aircraft parts.

Similarly, the Oil and Gas (O&G) industry widely employs composite coatings to safeguard pipelines, drilling equipment, and storage tanks against corrosion and abrasion. The remarkable performance delivered by these coatings contributes to the overall efficiency and safety of O&G operations.

Furthermore, the marine sector's robust revenue growth, coupled with the increasing need for offshore exploration and maritime transport, further fuels the expansion of the composite coatings market. The maritime industry heavily depends on composite coatings to offer effective defense against corrosion and fouling, ensuring the longevity and performance of marine structures and vessels.

Additionally, the construction sector is witnessing an escalating demand for composite coatings to provide exceptional protection against corrosion and weathering. Materials like steel, concrete, and wood, commonly used in construction projects, significantly benefit from the extended lifespan facilitated by composite coatings' heightened resistance to rust and weather-related damage.

In summary, the demand for composite coatings is expected to sustain its upward trajectory across various industries. This demand surge is propelled by the need for superior protection, enhanced performance, and prolonged lifespan of critical components and structures.

## Key Market Drivers

### Growing Demand of Composite Coatings in Automotive Industry

The global composite coatings market has been witnessing significant growth, driven by the growing demand for composite coatings in the automotive industry. Composite coatings offer numerous benefits, such as enhanced durability, improved performance, and increased resistance to corrosion, chemicals, and wear. These advantages have made composite coatings increasingly popular in automotive applications, thus contributing to the expansion of the global market.

Composite coatings are specifically designed to enhance the performance and functionality of various automotive components, including exterior body parts, interior trim, engine components, chassis, and suspension systems. These coatings not only provide lightweight yet robust protection but also help improve fuel efficiency and reduce emissions. As the automotive industry continues to prioritize sustainability and fuel economy, the demand for composite coatings has risen.

One of the key drivers behind the growing demand for composite coatings in the automotive industry is the need for advanced corrosion protection. Automotive components are exposed to various environmental factors, including moisture, salt, UV radiation, and chemicals. Composite coatings provide a barrier that effectively protects against corrosion, extending the lifespan of automotive parts and reducing maintenance costs. With the rising demand for vehicles in regions with harsh climates, such as coastal areas, the need for effective corrosion protection has become imperative.

Moreover, composite coatings offer excellent chemical resistance, making them suitable for automotive components that come into contact with various fluids, fuels, and automotive chemicals. The ability of composite coatings to withstand exposure to these substances without degradation or damage ensures the longevity and reliability of automotive parts, leading to increased adoption in the industry.

In addition to protection, composite coatings also contribute to improving the aesthetics of automotive components. These coatings can be customized to achieve various finishes, colors, and textures, thus enhancing the visual appeal of vehicles. With consumers placing importance on the appearance of their cars, automotive manufacturers are increasingly incorporating composite coatings to create sleek, attractive designs.

Furthermore, composite coatings play a crucial role in reducing friction and wear in automotive applications. The automotive industry is constantly seeking ways to improve the efficiency and performance of vehicles. Composite coatings with low friction properties are applied to critical components such as engine parts, bearings, and gears, reducing energy loss and enhancing overall vehicle performance. These coatings also minimize wear and tear, leading to increased durability and reliability.

The increasing adoption of electric and hybrid vehicles has further fueled the demand for composite coatings in the automotive industry. As these vehicles gain popularity, there is a need for lightweight materials that can help optimize range and battery life. Composite coatings offer a viable solution by providing a lightweight protective layer

that ensures the longevity and performance of electric and hybrid vehicle components.

In conclusion, the growing demand for composite coatings in the automotive industry is a significant driver of the global composite coatings market. The need for advanced corrosion protection, chemical resistance, improved aesthetics, and enhanced performance in vehicles has propelled the adoption of composite coatings. As automotive manufacturers continue to prioritize sustainability, fuel efficiency, and superior performance, the demand for composite coatings is expected to rise steadily, driving the growth of the global market. With ongoing technological advancements and increasing awareness of the benefits offered by composite coatings, the future of this market looks promising.

### Growing Demand of Composite Coatings in Oil and Gas Industry

The global composite coatings market has experienced significant growth, primarily driven by the increasing demand for composite coatings in the oil and gas industry. This expansion can be attributed to the unique properties and benefits offered by composite coatings, making them highly suitable for protecting equipment and infrastructure in the harsh and demanding environments of the oil and gas sector.

Composite coatings are specifically designed to provide superior protection against corrosion, abrasion, erosion, and chemical attack. These coatings find extensive applications in various oil and gas equipment, such as pipelines, tanks, valves, offshore structures, and drilling equipment. Given the challenging operating conditions, including exposure to saltwater, corrosive substances, and extreme temperatures, the oil and gas industry requires durable solutions. Composite coatings offer exceptional resistance to these harsh conditions, ensuring the longevity and reliability of the equipment.

One of the primary drivers behind the adoption of composite coatings in the oil and gas industry is the need for effective corrosion protection. Corrosion poses a significant challenge, leading to equipment failure, leaks, and increased maintenance costs. By acting as a protective barrier, composite coatings isolate metal surfaces from corrosive agents, significantly extending the lifespan of equipment. Moreover, the use of composite coatings reduces downtime and maintenance expenses, making them an indispensable solution for the oil and gas industry.

Furthermore, composite coatings exhibit excellent resistance to abrasion and erosion, both of which are common challenges faced by the oil and gas sector. Equipment such as pumps, valves, and pipelines experience high pressures, flow rates, and the

presence of abrasive particles. Composite coatings with enhanced wear resistance can effectively prevent damage to critical components, ensuring reliable operation and minimizing the need for frequent replacements or repairs.

In addition to corrosion and wear resistance, composite coatings demonstrate remarkable chemical resistance. Given the wide range of corrosive and aggressive chemicals encountered in the oil and gas industry, including acids, alkalis, and hydrocarbons, the ability of composite coatings to withstand exposure to these chemicals is paramount. The chemical resistance of composite coatings ensures the safe and efficient operation of oil and gas facilities, offering reliable protection to underlying equipment.

Moreover, composite coatings offer thermal insulation properties, which are crucial for the oil and gas industry, especially in offshore installations or subsea applications where equipment is exposed to extreme temperatures. By providing thermal insulation, composite coatings minimize heat transfer and mitigate the risk of thermal expansion or contraction. This ability to withstand temperature variations helps maintain the structural integrity and performance of equipment in demanding environments, ensuring optimal operational efficiency.

The growing demand for energy and the exploration of new oil and gas reserves have further contributed to the increasing adoption of composite coatings. As the industry expands into more challenging and remote regions, the need for reliable and durable coatings becomes even more critical. Composite coatings provide a cost-effective solution for protecting infrastructure in these harsh environments, ensuring operational efficiency, safety, and sustainability.

In conclusion, the escalating demand for composite coatings in the oil and gas industry is driving the growth of the global composite coatings market. The need for superior corrosion protection, wear resistance, chemical resistance, and thermal insulation in the oil and gas sector has led to the widespread adoption of composite coatings. As the industry continues to evolve and faces increasingly demanding challenges, the demand for advanced composite coatings is expected to rise, further fueling the growth of the global market.

## Key Market Challenges

### Raw Material Availability and Price Volatility

Composite coatings are meticulously formulated using a carefully balanced combination of various raw materials. These materials, including resins, fibers, fillers, additives, and solvents, come together to create coatings with specific properties and performance characteristics. The availability of these raw materials, however, can be influenced by a multitude of factors, making it an intricate puzzle to maintain a steady supply.

One of the primary concerns when it comes to raw material availability lies in the dependency on petrochemical-based resins. Many composite coatings heavily rely on resins derived from petroleum products, such as epoxy, polyurethane, and polyester resins. The production of these resins is intricately linked to the availability and price of crude oil and its derivatives. Fluctuations in oil prices or disruptions in the supply chain can significantly impact the availability and cost of these resins, consequently affecting the production and pricing of composite coatings.

Beyond the realm of resins, other key raw materials used in composite coatings also face their own set of availability challenges. Fibers, such as carbon fiber and glass fiber, play a crucial role in reinforcing the coatings and imparting strength and durability. However, the production capacity of these fibers is limited, and any disruptions in the supply chain or increased demand from other industries can lead to shortages and price hikes. Similarly, additives and specialty chemicals used in composite coatings may have limited production capacities or face supply chain challenges, further impacting their availability and cost.

Moreover, the global market for raw materials used in composite coatings is highly competitive, with multiple industries vying for limited resources. This competitive landscape intensifies the challenges related to raw material availability. Industries such as automotive, aerospace, oil and gas, and construction all require substantial quantities of raw materials for their respective composite coating needs. The demand from these industries can create imbalances in supply and demand, leading to shortages and price volatility.

Price volatility is another critical challenge faced by the global composite coatings market due to raw material availability. Fluctuations in raw material prices directly impact the production costs for composite coatings. During periods of shortages or increased demand, raw material prices tend to rise, thereby increasing the production expenses for manufacturers. These increased costs are often passed on to customers, affecting the competitiveness and profitability of the market.

In summary, the intricate nature of composite coatings and their raw materials



necessitates a deep understanding of the challenges related to raw material availability. By carefully navigating these complexities, the industry can strive to ensure a steady supply of high-quality composite coatings, meeting the diverse needs of various sectors while fostering sustainable growth.

## Key Market Trends

### Expansion in Aerospace and Defense

The global composite coatings market is experiencing a substantial trend of expansion, particularly in the aerospace and defense sectors. With continuous growth in these industries, there is a rising demand for advanced coating solutions that provide enhanced protection, durability, and performance. Composite coatings, with their unique properties and characteristics, are increasingly becoming the preferred choice for aerospace and defense applications, thus driving the overall growth of the global composite coatings market.

The aerospace industry, encompassing both commercial and military aircraft manufacturing, serves as one of the primary drivers behind the expansion of the global composite coatings market. The demand for lightweight and fuel-efficient aircraft is on the rise, and composite materials play a pivotal role in achieving these objectives. Composite coatings serve as an additional layer of protection for critical aircraft components, including fuselages, wings, and engine parts, ensuring resistance against corrosion, abrasion, and harsh environmental conditions.

Composite coatings offer several advantages in aerospace applications. They exhibit excellent mechanical strength, high impact resistance, and fatigue resistance, which are crucial for withstanding the extreme conditions experienced during flight operations. Furthermore, these coatings can be customized to meet specific requirements such as thermal insulation, electromagnetic shielding, and anti-icing properties. As aircraft designs continue to evolve and manufacturers strive for improved performance, composite coatings have become an integral part of ensuring the longevity and reliability of aerospace structures.

In the defense sector, composite coatings play a vital role in protecting military equipment and vehicles from hostile environments and combat conditions. Military aircraft, armored vehicles, naval vessels, and missiles require robust coatings that can withstand extreme temperatures, chemical exposure, and physical stress. Composite coatings offer exceptional resistance to corrosion, erosion, and chemical attack, thereby

enhancing the durability and longevity of defense equipment in demanding operational environments.

Moreover, the expansion of the aerospace and defense industries is not limited to developed economies but is also being witnessed in emerging markets. Countries across the globe are making significant investments in the modernization of their defense capabilities and the development of indigenous aerospace manufacturing capabilities. This increased investment in aerospace and defense infrastructure provides a strong foundation for the growth and development of the global composite coatings market.

As the aerospace and defense sectors continue to advance, the demand for innovative composite coatings solutions is expected to further increase. With ongoing advancements in technology and the continuous pursuit of improved performance and efficiency, the global composite coatings market is poised for significant growth in the coming years.

### Segmental Insights

#### Technology Insights

Based on the category of technology, the brazing segment emerged as the dominant player in the global market for Composite Coatings in 2022. The brazing technique, a widely employed method, plays a crucial role in enhancing the toughness of coatings, offering superior resistance. These coatings not only provide excellent waterproofing and corrosion protection but also shield against harmful factors such as UV radiation, scratches, excessive heat, and fire. The lightweight composite coatings market, primarily utilized in the aerospace, automobile, and defense industries, is projected to experience substantial growth in the forthcoming years due to its exceptional properties and applications.

#### End User Insights

The Aerospace & Defense segment is projected to experience rapid growth during the forecast period. Composite coatings, consisting of a combination of different materials, are gaining significant traction in aerospace and defense applications. This is primarily because of their exceptional attributes, including high strength, lightweight nature, and remarkable resistance to corrosion and wear. However, their impact goes beyond these advantages. The application of composite coatings on crucial aircraft components, such



as wings, fuselages, and propellers, not only enhances overall aircraft efficiency, but also contributes to reduced fuel consumption. By leveraging the unique properties of composite coatings, aerospace and defense industries are able to achieve enhanced performance, durability, and sustainability in their operations.

## Regional Insights

Asia Pacific emerged as the dominant player in the Global Composite Coatings Market in 2022, holding the largest market share in terms of value. The dominance of the Asia Pacific region in the composite coatings market can be attributed to several factors. Firstly, the region's demand for composite coatings is on the rise, driven by significant infrastructure development in emerging economies such as China and India. The construction boom and increasing automotive and aerospace sectors in these countries are major contributors to the growing demand for composite coatings.

Moreover, the Asia Pacific region is home to a multitude of companies operating in sectors such as automotive, aerospace, and construction that extensively utilize composite coatings. These industries understand the benefits of composite coatings, including their lightweight and high-strength properties, which are crucial in achieving fuel efficiency, durability, and performance.

Furthermore, the presence of leading composite coatings manufacturers in the Asia Pacific region adds to its dominance. These manufacturers, with their strong research and development capabilities, continuously innovate and produce advanced composite coatings that meet the evolving industry requirements. The export activities of these manufacturers also contribute to the expansion of the global composite coatings market.

Overall, the Asia Pacific region stands at the forefront of the composite coatings market, driven by its growing demand, diverse industry applications, and the presence of industry-leading manufacturers.

## Key Market Players

Axalta Coating Systems, LLC

A.W. Chesterton Company

KC Jones Plating Company

PPG Industries, Inc.

OM Sangyo Co., Ltd.

Poeton Industries Ltd.

Nickel Composite Coatings, Inc.

Surteckariya Co., Ltd.

Sharretts Plating Company

Walter Hunger GmbH and Co. Kg.

Report Scope:

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

Composite Coatings Market, By Technique:

Laser Melt Injection

Brazing

Electroless Plating

Others

Composite Coatings Market, By Application:

Anti-Corrosion

UV Protection

Thermal Protection

Others

## Composite Coatings Market, By End User:

Transportation

Aerospace & Defense

Industrial

Oil & Gas

Others

## Composite Coatings 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

Kuwait

Turkey

Egypt

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Composite Coatings Market.

Available Customizations:

Global Composite Coatings Market report with the given market data, Tech Sci

*Composite Coatings Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmente...*

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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