

Decorative Coatings Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Resin Type (Acrylic Resin, Alkyd Resin, Vinyl Resin, Polyurethane Resin, Others), By Technology (Waterborne Coatings, Solvent-Borne Coatings, Powder Coatings), By End User (Residential and Non-Residential), By Region and Competition

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Abstracts

Global Decorative Coatings Market has valued at USD84.12 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 4.49% through 2028. The rising demand for these products in buildings is driven by their ability to enhance surface durability and appearance, while also providing protection against harsh weather conditions such as UV radiation, extreme temperatures, acid rain, and foreign particles. This increased demand is expected to fuel industry growth over the forecast period. Additionally, the superior properties of these coatings, including moisture resistance, corrosion resistance, UV radiation resistance, bacteria resistance, and heat resistance, further contribute to the growth of the industry.

The increasing demand for eco-friendly waterborne coatings in emerging economies like China and India is set to propel the development of the industry. The establishment of joint ventures between key coating participants and local manufacturers in the Asia Pacific region is expected to drive market growth. Furthermore, the infrastructure development in these emerging economies, coupled with rising government spending in fiscal budgets, particularly in India and China, plays a significant role in driving the high demand for waterborne coatings.

Stringent environmental regulations on volatile organic compound (VOC) emissions in

North America and Europe are anticipated to drive the waterborne technology market during the forecast period. However, the market growth may be hindered by the fluctuating prices of raw materials such as alkyd, epoxy, acrylic, and titanium dioxide. Moreover, the harmful environmental effects caused by solvent-borne coatings present a key challenge for the market in the coming years.

Technological advancements, including the use of Nano-TiO₂ photocatalysts, green coatings, and methods to reduce drying time, are expected to propel market growth over the forecast period. Increasing investments in research and development, along with ongoing product development efforts to improve the performance of these coatings, will further stimulate market growth in the next seven years.

The rapid infrastructural development in emerging economies like India, China, Brazil, and South Korea, characterized by the construction of shopping malls, housing complexes, and office buildings, is estimated to fuel the growth of the decorative coatings industry in the near future. Furthermore, the increasing demand for coatings from do-it-yourself (DIY) consumers is expected to contribute to market share growth.

Moreover, the introduction of new waterborne coatings with different formulations by various companies, aimed at imparting antibacterial and anti-odor properties, is anticipated to drive market growth over the next seven years. The market will also be propelled by the introduction of nanocoatings and green coatings.

The decorative coatings market in Brazil is expected to witness growth due to increased investment by companies and the establishment of more coatings production facilities. Additionally, the emerging economies of Malaysia, Thailand, and Singapore in Southeast Asia are projected to experience surging growth, driven by the establishment of commercial establishments such as business parks and shopping malls. However, market growth may be restricted by the volatility of raw material prices in the coming seven years.

Key Market Drivers

Urbanization and Infrastructure Development

Urbanization is a key factor contributing to the expansion of the decorative coatings market. As cities grow and evolve, the demand for buildings and infrastructure increases, leading to a surge in the need for decorative coatings. These coatings are used extensively in residential, commercial, and industrial settings to enhance aesthetic

appeal and provide protection against weathering and corrosion.

Furthermore, infrastructure development, particularly in emerging economies, is playing a pivotal role in driving the market growth. Governments worldwide are investing heavily in infrastructure projects, including transportation, housing, and public facilities, thereby increasing the demand for decorative coatings. For instance, in developing countries, the construction of new roads, bridges, and buildings is booming, creating a substantial market for decorative coatings.

The Asia-Pacific region, in particular, is a hotbed for growth in the decorative coatings market. Rapid urbanization, coupled with substantial investments in infrastructure development, is fueling the market's expansion in this region. China and India, with their fast-growing economies and burgeoning middle classes, are leading the charge. The increasing disposable income of the middle-class population in these countries is driving the demand for more residential and commercial spaces, thereby boosting the need for decorative coatings.

In conclusion, the global decorative coatings market is on a promising growth path, primarily driven by rapid urbanization and infrastructure development. As cities continue to expand and infrastructure projects multiply, the demand for decorative coatings is expected to rise correspondingly. With technological advancements adding another layer of growth potential, such as the development of eco-friendly and long-lasting coatings, the future of the decorative coatings market appears bright.

Growth in Real Estate and Construction

The robust growth in the real estate sector is a key factor propelling the decorative coatings market. As more residential and commercial buildings are constructed, the demand for decorative coatings increases correspondingly. These coatings are not only used to enhance aesthetic appeal but also provide protection against weathering and corrosion, ensuring the longevity of the structures.

A similar trend can be observed in the construction industry, where infrastructure projects such as the development of public facilities, transportation networks, and housing complexes require decorative coatings for both protective and aesthetic purposes. These coatings play a crucial role in safeguarding the infrastructure from harsh environmental conditions while adding visual appeal to the surroundings.

The Asia-Pacific region is witnessing particularly strong growth in the decorative

coatings market, largely due to the rapid expansion of its real estate and construction sector. Emerging economies such as China and India are leading this growth, driven by increasing urbanization and rising middle-class populations. The demand for new residential and commercial spaces in these countries is soaring, further fueling the need for decorative coatings.

In addition to the growth in the market, advancements in coating technologies are expected to further propel the industry. The development of eco-friendly and low-VOC coatings, for instance, not only benefits the environment but also aligns with the increasing consumer demand for sustainable products. As customers become more conscious of their environmental footprint, the demand for environmentally friendly coatings is expected to rise.

In conclusion, the global decorative coatings market is on a promising growth path, with the expansion of the real estate and construction sector acting as a primary driver. As these sectors continue to grow, particularly in emerging economies, the demand for decorative coatings is expected to rise in tandem. Moreover, technological advancements in the industry, such as the development of eco-friendly coatings, offer additional avenues for market growth. With a bright future ahead, the decorative coatings market is poised for further success.

Key Market Challenges

Fluctuations in Raw Material Availability and Cost

Decorative coatings play a vital role in enhancing the aesthetics and durability of various surfaces. These coatings are meticulously formulated using a diverse range of raw materials, such as resins, solvents, pigments, and additives. The availability and cost of these materials are crucial factors that can significantly influence the dynamic decorative coatings market.

Any fluctuation in the availability or cost of raw materials can have a profound impact on the industry. For example, a sudden shortage of key raw materials can disrupt production schedules, leading to delays and negatively affecting the entire supply chain. Moreover, such disruptions can also result in increased costs, as manufacturers may need to source alternative materials or pay higher prices to secure the necessary resources.

Conversely, an unexpected surge in raw material costs can squeeze profit margins for

manufacturers. To maintain profitability, manufacturers may be compelled to raise their prices, potentially leading to reduced demand from consumers. This ripple effect can further impact the overall market dynamics.

These fluctuations in raw material availability and cost can have both short-term and long-term effects on the decorative coatings market. In the short term, manufacturers may need to swiftly adjust their production schedules and pricing strategies to adapt to the changing landscape. This adaptability ensures that they can meet customer demands while effectively managing costs.

In the long term, these fluctuations can shape the market's growth trajectory. If raw material costs remain persistently high or their availability continues to be unpredictable, it could deter potential new entrants from entering the market. Moreover, existing players may hesitate to expand their operations due to the uncertain raw material landscape. These factors can restrain the market's overall growth potential and disrupt the equilibrium between supply and demand.

Therefore, the intricate relationship between raw material availability, cost fluctuations, and the decorative coatings market necessitates a proactive approach from industry players. Constant monitoring, strategic sourcing, and agile decision-making are essential to navigate these challenges and ensure the industry's sustained growth and success.

Key Market Trends

Growing Demand for Eco-Friendly Coatings

Eco-friendly coatings, also referred to as green or sustainable coatings, have gained significant attention due to their ability to minimize environmental impact. These coatings are designed with a focus on reducing volatile organic compounds (VOCs), utilizing renewable resources, and adopting environmentally friendly production processes.

The rising popularity of eco-friendly coatings can be attributed to a combination of factors. Firstly, there is a growing environmental awareness among consumers who are now more informed and conscious about the ecological consequences of their purchasing decisions. As a result, they actively seek out products that align with their values, including eco-friendly decorative coatings.

Furthermore, governments across the globe are implementing stricter regulations on VOC emissions, promoting the adoption of eco-friendly coatings. These regulations are not only encouraging manufacturers to invest in the development and production of greener alternatives but also reshaping the competitive landscape of the industry. Manufacturers that offer eco-friendly coatings gain a competitive edge by attracting environmentally conscious consumers and complying with regulatory standards.

The increasing demand for eco-friendly coatings has had a profound impact on the decorative coatings market. It has sparked innovation, leading manufacturers to heavily invest in research and development to create high-quality and sustainable coatings. This continuous pursuit of improvement ensures that eco-friendly coatings not only meet but exceed customer expectations.

In summary, the trend towards eco-friendly coatings is a result of various factors, including the environmental consciousness of consumers, stricter regulations, and advancements in coating technology. This growing demand has not only driven innovation but also transformed the competitive dynamics of the industry, with manufacturers focusing on creating sustainable and high-performance coatings.

Segmental Insights

Resin Type Insights

Based on the category of resin type, the acrylic resin segment emerged as the dominant player in the global market for Decorative Coatings in 2022. Acrylic resin, a versatile material composed of acrylic monomers, is often enriched by incorporating various chemical classes. These resins primarily consist of esters derived from acrylic, methacrylic, or a combination of both acids. Renowned for their exceptional resistance to chemical and photochemical attacks, acrylic resins find widespread application in industries. They are extensively employed in the formulation of coatings, available in both solvent-based and water-based variants. The remarkable properties of acrylic resins, including excellent adhesion, flexibility, weather resistance, and durability, render them an ideal choice for decorative coatings. These coatings are suitable for a diverse range of surfaces, such as exterior and interior walls, wood, concrete, and metal.

Notably, water-based acrylic resin coatings have gained significant popularity due to their low volatile organic compound (VOC) content, minimal odor, and ease of application. As consumer awareness towards environmental safety and human health grows, the demand for coatings that are eco-friendly and non-toxic is expected to drive

the growth of the decorative coatings market in the forecast period.

Technology Insights

The Powder Coatings segment is projected to experience rapid growth during the forecast period. Powder coatings are widely recognized for their exceptional durability and longevity, surpassing other types of coatings in these aspects. Their remarkable resistance to scratches, fading, chipping, and corrosion makes them the top choice for applications in high-traffic and harsh environments. Moreover, powder coatings are highly regarded for their eco-friendliness compared to traditional solvent-based coatings. With significantly lower or no volatile organic compounds (VOCs), which can be detrimental to air quality and human health, powder coatings contribute to a cleaner and safer environment. As a result, the segment growth of the decorative coatings market is expected to be strongly supported during the forecast period, driven by the increasing demand for these sustainable and high-performance coatings.

Regional Insights

Asia Pacific emerged as the dominant player in the Global Decorative Coatings Market in 2022, holding the largest market share in terms of value. The rapid urbanization and industrialization in the region can be attributed to factors such as population growth and economic development. This has led to an increase in demand for decorative coatings, especially in countries like China, India, and Southeast Asia, where disposable income is on the rise. The growing application sector, including industries like construction and automotive, is also contributing to the growth of the decorative coatings market in the region during the forecast period. As a result, the market is expected to experience steady expansion in the coming years.

Key Market Players

PPG Industries Inc.

Axalta Coating Systems Ltd.

Nippon Paint Holdings Co Ltd

Kansai Paint Co Ltd

Bayer AG

Valspar Corporation

Sherwin-Williams Company

KCC Corporation

Jotun A/S

BASF SE

Report Scope:

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

Decorative Coatings Market, By Resin Type:

Acrylic Resin

Alkyd Resin

Vinyl Resin

Polyurethane Resin

Others

Decorative Coatings Market, By Technology:

Waterborne Coatings

Solvent-Borne Coatings

Powder Coatings

Decorative Coatings Market, By End User:

Residential

Non-Residential

Decorative 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 Decorative Coatings Market.

Available Customizations:

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