

# **India Surface Treatment Market By Chemical Type (Cleaners, Plating Chemicals, Conversion Coating, Others), By Material (Metals, Plastics, Others), By End User (Transportation, Construction, Packaging, Industrial, Others), By Region, Competition, Forecast and Opportunities, 2019-2029**

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## **Abstracts**

India Surface Treatment Market has reached reach USD 382.48 million by 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 5.94% through 2029. The surface treatment market in India is experiencing remarkable growth, propelled by a combination of factors including rapid industrialization, advancements in technology, and a thriving manufacturing sector. This dynamic market is characterized by its segmentation based on chemical type, material, end-use industry, and region, showcasing its diversity and potential.

Surface treatment involves the precise application of various chemicals to modify the surface properties of materials, resulting in enhanced durability, resistance, and aesthetic appeal. The range of chemicals used includes conversion coatings, cleaners, sealers, and corrosion protection chemicals, each playing a vital role in the overall process.

One of the primary drivers for this market is the escalating demand from key end-use industries such as automotive, aerospace, industrial manufacturing, and construction. These sectors heavily rely on surface treatment technologies to ensure corrosion resistance, improved durability, and enhanced appearance of their products, thus driving the demand for surface treatment chemicals.

Furthermore, the increasing focus on sustainability has led to the development of eco-friendly surface treatment chemicals. Manufacturers are embracing sustainable practices, contributing to a surge in the demand for green alternatives in the surface treatment market. This shift towards eco-friendly solutions not only benefits the environment but also presents opportunities for market players to align with global sustainability goals.

Government initiatives such as 'Make in India' have also played a crucial role in promoting domestic manufacturing, indirectly fostering the demand for surface treatment chemicals. These initiatives aim to boost local production, thereby elevating the need for efficient surface treatment solutions.

However, the market is not without its challenges. Stringent environmental regulations and the requirement for high initial investment pose obstacles for market players. Despite these challenges, the Indian surface treatment market is projected to witness substantial growth in the coming years, fueled by the increasing demand from various industries and the positive impact of government policies.

In conclusion, the surface treatment market in India is on a promising growth trajectory, driven by the rising demand from diverse industries, the shift towards sustainable practices, and favorable government support. As the market continues to expand and evolve, it presents immense opportunities for players in the surface treatment sector to innovate, collaborate, and capitalize on the potential of this thriving industry.

## Key Market Drivers

### Growing Demand of Surface Treatment in Transportation Industry

The surface treatment market in India is currently witnessing a substantial surge in demand, primarily attributed to the escalating needs of various end-use industries. Among these industries, the transportation sector stands out as a major contributor to this positive trend, driving the growth of the market in India.

Surface treatment processes play a crucial role in the transportation industry, finding extensive application in the automotive, aerospace, and marine segments. These processes involve the application of a wide range of chemicals to modify the surface properties of materials, thereby enhancing their durability, resistance, and overall aesthetic appeal.

In the automotive sector, surface treatment technologies are utilized to provide effective corrosion resistance, improve wear resistance, and enhance the visual appearance of vehicles. Similarly, in the aerospace industry, surface treatments are employed to safeguard aircraft components from harsh environmental conditions, leading to reduced maintenance costs and extended component lifespan.

The increasing production of vehicles, including both commercial and passenger vehicles, combined with the growing aerospace and marine sectors, is driving the demand for surface treatment in the transportation industry. As manufacturers strive to enhance the quality and performance of their products, the need for advanced surface treatment technologies continues to rise steadily.

In conclusion, the rising demand for surface treatment in the transportation industry serves as a significant driver for the surface treatment market in India. As the transportation industry continues to evolve with a strong focus on product quality and performance, the requirement for advanced surface treatment technologies is expected to experience further growth. This trend creates a favorable outlook for the future of the surface treatment market in India, positioning it for robust and sustained growth in the years to come.

### Growing Demand of Surface Treatment in Construction Industry

Surface treatment plays a pivotal role in the construction industry. It involves the application of various chemicals and processes to alter the surface properties of materials, enhancing their durability, resistance to corrosion, weathering, and aesthetic appeal. These processes, such as sandblasting, coating, and polishing, are crucial in the construction sector where materials need to withstand harsh environmental conditions, heavy usage, and wear over time.

The construction industry in India is witnessing robust growth, driven by rapid urbanization, population growth, and government initiatives such as the ambitious 'Housing for All' program. This growth translates into an escalating demand for surface treatment in the country. As the construction of new buildings, infrastructure, and industrial facilities increases, so does the need for advanced surface treatment technologies that ensure the longevity, quality, and sustainability of these structures.

In conclusion, the rising demand for surface treatment in the construction industry is a significant driver for India's surface treatment market. As the construction industry continues to grow and evolve, with a strong focus on sustainability, safety, and quality,

the need for advanced surface treatment technologies is expected to rise further. This trend presents a promising outlook for the surface treatment market in India, reinforcing its position as a key player in the global arena and providing ample opportunities for innovation, investment, and growth in the sector.

## Key Market Challenges

### Disruptions in Supply Chain

The surface treatment market in India is currently experiencing substantial growth, driven by increasing demand from various end-use industries. This growth can be attributed to factors such as the rapid expansion of the automotive and manufacturing sectors, as well as the rising awareness about the importance of surface treatment in enhancing product quality and performance.

However, like many other sectors, the surface treatment market has not been immune to challenges. One of the most significant hurdles that this market faces today is supply chain disruptions. These disruptions have been primarily caused by the recent global pandemic, which has led to unprecedented disruptions in global supply chains. Factors such as lockdowns, labor shortages, transportation delays, and increased freight costs have all contributed to the challenges faced by the surface treatment market.

The surface treatment market relies heavily on a well-functioning supply chain. It involves the application of various chemicals to alter the surface properties of materials, enhancing their durability, resistance, and aesthetic appeal. The production and distribution of these chemicals require a robust and efficient supply chain. However, the disruptions in the supply chain have led to increased lead times, inflated costs, and decreased availability of essential raw materials for the surface treatment market. This has posed a major challenge for manufacturers who are struggling to meet the rising demand from end-use industries.

Furthermore, these disruptions have not only impacted the operational aspects of the surface treatment market but have also created uncertainty in the market as a whole. The uncertainty surrounding future supply chain stability has made it difficult for businesses to plan and forecast accurately. This, in turn, could potentially deter investments and stifle innovation in the sector.

In conclusion, while the surface treatment market in India shows promising growth potential, the disruptions in supply chains pose a formidable challenge. As the industry

navigates through these rough waters, it will be crucial for stakeholders to develop more resilient supply chains and diversify sourcing strategies. This will not only help to mitigate current disruptions but also strengthen the market's ability to withstand future shocks and uncertainties. Taking these proactive measures will ensure the long-term growth and sustainability of the surface treatment market in India.

## Key Market Trends

### Growing Focus on Corrosion Protection

Surface treatment is a comprehensive process that involves the application of various chemicals to modify the surface properties of materials. By doing so, it enhances their durability, resistance, and aesthetic appeal. One of the primary objectives of surface treatment is to provide effective corrosion protection. Corrosion, if left unchecked, can cause materials to deteriorate over time, compromising their structural integrity and overall lifespan. Consequently, implementing efficient corrosion protection measures is of utmost importance for multiple industries, including automotive, construction, aerospace, and marine.

As industries constantly strive to enhance the longevity and performance of their products, the focus on corrosion protection has intensified significantly. This emphasis is particularly notable in sectors such as automotive and construction, where materials are frequently exposed to harsh environmental conditions and need to withstand relentless wear and tear over extended periods.

Take the automotive industry, for instance. Here, corrosion protection is not only crucial for maintaining the aesthetic appeal of vehicles but also for ensuring their safety and durability. Similarly, in the construction industry, corrosion protection plays a pivotal role in safeguarding the structural integrity and longevity of buildings and infrastructure.

The growing emphasis on corrosion protection has far-reaching implications for the surface treatment market in India. It has sparked a surge in demand for advanced surface treatment technologies and solutions that offer superior corrosion resistance. Manufacturers are actively investing in research and development to create innovative products that can meet this rising demand effectively.

In conclusion, the escalating focus on corrosion protection stands as a significant trend in India's surface treatment market. As industries continue to prioritize durability and longevity in their products, the need for advanced corrosion protection solutions is

expected to rise further. This trend presents a promising growth avenue for the surface treatment market in India, positioning it for continued success in the years to come. With continuous advancements in surface treatment technologies and the proactive efforts of manufacturers, the industry is positioned to cater to the evolving needs of diverse sectors and contribute to India's industrial growth in a significant way.

## Segmental Insights

### Chemical Type Insights

Based on the category of chemical type, the plating chemicals segment emerged as the dominant player in the Indian market for Surface Treatment in 2023. The growth of the plating chemicals market segment can be attributed to its suitability for use in various industries such as transportation, industrial machinery, and construction. Plating chemicals are widely adopted to reduce scrap rate, bath solution losses, and to improve the quality of the surface.

Moreover, the cleaning chemicals segment is projected to experience significant growth. These chemicals are crucial in industries for cleaning and degreasing substrates before plating. Additionally, they effectively remove oils and coolants, lapping compounds, carbon smut, metal oxides, and various other soils from surfaces during various surface treatment processes.

The increasing demand for plating and surface treatment solutions in different industries underscores the importance of plating and cleaning chemicals in achieving optimal results and meeting industry standards.

### End User Insights

The transportation segment is projected to experience rapid growth during the forecast period. The growth of this segment of the market can be attributed to the ongoing process of urbanization, which has led to an increasing number of people moving to cities and therefore a higher demand for personal vehicles. Additionally, the rising population has contributed to an increased number of vehicles on the road. Furthermore, the continuous efforts to improve road infrastructure have made it more accessible and convenient for individuals to own and use personal vehicles in the country. These factors combined have resulted in a significant boost in the number of personal vehicles on the roads.

## Regional Insights

West India emerged as the dominant player in the India Surface Treatment Market in 2023, holding the largest market share in terms of value. West India, particularly states like Maharashtra and Gujarat, are widely recognized for their robust industrial prowess. These states boast a remarkable concentration of diverse industries, including automotive, construction, and metal forging. These sectors, being significant end-users of surface treatment technologies, contribute substantially to the soaring demand for surface treatment solutions in the region. This high demand, in turn, serves as a major driving force for the growth of the surface treatment market in West India.

Apart from its flourishing industries, West India takes pride in its exceptional infrastructure and connectivity, which play a pivotal role in ensuring the seamless operation of the supply chain within the surface treatment market. The region is extensively connected through a well-developed network of roads, railways, airways, and seaports, facilitating the smooth transportation of raw materials and finished goods. This efficient connectivity further bolsters the overall efficiency and effectiveness of the surface treatment industry in West India.

Additionally, the dominance of West India in the surface treatment market can be attributed to the proactive initiatives undertaken by the government to promote industrial growth. Notable policies like 'Make in India' have significantly encouraged and incentivized the establishment of manufacturing units in the region. This strategic focus on industrial development indirectly fuels the demand for surface treatment, as the growing number of manufacturing facilities in West India necessitate reliable and effective surface treatment solutions.

In summary, West India's industrial might, coupled with its robust infrastructure, connectivity, and supportive government policies, have firmly established the region as a key player in the thriving surface treatment market.

## Key Market Players

Chemetall India Pvt. Ltd.

PPG Asian Paints Pvt. Ltd.

Nippon Paint India Pvt. Ltd.

Solvay Specialities India Private Limited

Yuken India Limited

Report Scope:

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

India Surface Treatment Market, By Chemical Type:

Cleaners

Plating Chemicals

Conversion Coating

Others

India Surface Treatment Market, By Material:

Metals

Plastics

Others

India Surface Treatment Market, By End User:

Transportation

Construction

Packaging

Industrial

Others

## India Surface Treatment Market, By Region:

North India

East India

West India

South India

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India Surface Treatment Market.

## Available Customizations:

India Surface Treatment 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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