

Waterborne Coatings Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Resin Type (Acrylic, Polyester, Alkyd, Epoxy, Polyurethane, Polytetrafluoroethylene (PTFE), Polyvinylidene Fluoride (PVDF), Polyvinylidene Chloride (PVDC), Others), By Application (Architectural, General Metals, Automotive and Industrial), By Region and Competition

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Abstracts

Global Waterborne Coatings Market has valued at USD103.03 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 4.20% through 2028. Waterborne coating is a term that is used to define any finish or surface coating which uses water as a solvent in order to disperse the resin that is added to it, creating a highly effective and durable coating. The composition of waterborne coatings varies and can include large amounts of water with small amounts of other solvents, ensuring a balanced and environmentally friendly formulation. The higher the water content, the more environmentally friendly and easy it is to apply the waterborne coatings, making them a preferred choice for many industries.

Waterborne coatings have gained popularity due to their low environmental impact. With about 800% water content, these coatings significantly reduce the emission of volatile organic compounds (VOCs) into the environment. The rise in awareness of the environmental impact of coatings and the implementation of government regulations to limit the use of non-environmentally friendly coatings have further contributed to the increasing demand for waterborne coatings.

Recognizing the importance of environmental sustainability, governments are taking initiatives to increase the water content used as a solvent in coatings. This not only makes them safer to use but also lowers their overall environmental impact. Moreover, the versatility of waterborne coatings has led to their extensive use in various industries including automobiles, healthcare, and building and construction. The growth of these industries, combined with the increasing awareness of environmental impact, continues to drive the market growth for the Waterborne Coatings Market.

By continuously improving the formulation and properties of waterborne coatings, the industry is committed to providing sustainable and high-performance solutions that meet the evolving needs of various sectors.

Key Market Drivers

Growing Demand of Waterborne Coatings in Automotive Industry

Waterborne coatings, as the name suggests, are based on water as a solvent to disperse the resin used to make the coating. This allows for a more sustainable and environmentally friendly approach, as waterborne coatings produce fewer Volatile Organic Compounds (VOCs) compared to traditional solvent-based coatings. By reducing VOC emissions, waterborne coatings contribute to a healthier environment and improved human health.

Moreover, waterborne coatings offer excellent aesthetic appeal and durability. They provide a wide range of vibrant colors and finishes, allowing automotive exteriors to stand out with a high-quality and visually appealing appearance. Additionally, these coatings exhibit exceptional resistance to UV rays, corrosion, and extreme weather conditions, ensuring long-lasting performance and protection for automotive surfaces.

The growing demand for waterborne coatings in the automotive industry is driving positive changes in the global market. As automakers prioritize sustainability, aesthetics, and durability, the demand for these coatings is expected to further rise. To meet this demand, manufacturers in the waterborne coatings market are investing in research and development efforts. These investments aim to develop advanced coatings with improved performance characteristics, such as enhanced corrosion resistance, superior adhesion, and better gloss retention.

In conclusion, the increasing demand for waterborne coatings in the automotive industry plays a significant role in the growth of the global waterborne coatings market. As

automakers continue to prioritize eco-friendly materials that do not compromise on aesthetics or durability, the importance of waterborne coatings will continue to rise. With ongoing advancements in coating technology, the future of the global waterborne coatings market looks promising, with sustained growth anticipated.

Growing Demand of Waterborne Coatings in Construction Industry

The global waterborne coatings market is currently experiencing significant growth, driven by a multitude of factors. One noteworthy factor is the escalating demand for waterborne coatings in the construction industry, which serves as a key driver for market expansion.

The construction industry, known for its emphasis on sustainability, durability, and aesthetic appeal, has emerged as a major consumer of waterborne coatings. These coatings are increasingly finding application in construction projects due to their numerous benefits and advantages.

Waterborne coatings are formulated using water as a solvent to disperse the resin, which forms the coating. As a result, they emit fewer Volatile Organic Compounds (VOCs), which are harmful to the environment and human health. This quality makes waterborne coatings a more sustainable and eco-friendly choice, aligning perfectly with the global shift towards greener construction practices.

Apart from their environmental benefits, waterborne coatings also offer exceptional durability and aesthetic appeal. They provide a wide range of colors and finishes, making them ideal for enhancing the visual appeal of buildings. Furthermore, these coatings exhibit resistance to UV rays, corrosion, and extreme weather conditions, ensuring their longevity and performance.

The growing demand for waterborne coatings in the construction industry is significantly influencing the global waterborne coatings market. As the construction sector continues to prioritize sustainability, aesthetics, and durability, the demand for these coatings is projected to witness further growth.

In response to this demand, manufacturers in the waterborne coatings market are investing in research and development to create advanced coatings with improved performance characteristics. These efforts are leading to the development of waterborne coatings that exhibit better resistance to corrosion, enhanced adhesion, and superior gloss retention, among other desirable properties.

Key Market Challenges

Longer Curing and Drying Time

The global waterborne coatings market has been experiencing significant growth in recent years, fueled by a combination of factors. One of the key drivers is the increasing focus on environmental sustainability, as waterborne coatings offer an eco-friendlier alternative to traditional solvent-based coatings. Additionally, industries such as automotive and construction have shown a high demand for waterborne coatings due to their superior performance and durability.

However, despite the numerous advantages of waterborne coatings, there are challenges that need to be addressed. One of the major hurdles is the longer curing and drying time associated with these coatings. Due to their higher water content, waterborne coatings require more time to dry and cure fully compared to solvent-based coatings. This can have implications on productivity and efficiency, especially in industries where time is of the essence, such as automotive manufacturing and construction.

The extended drying times can result in delays in production schedules and project timelines. Moreover, the longer exposure to the environment during the drying process increases the likelihood of dust contamination, which can negatively impact the overall finish quality of the coated surfaces. Therefore, finding innovative solutions to reduce the curing and drying time of waterborne coatings is crucial for maximizing productivity and maintaining high-quality standards.

Despite these challenges, the demand for waterborne coatings continues to grow as industries recognize the benefits they offer in terms of environmental sustainability and performance. By addressing the issue of longer curing and drying times, the waterborne coatings market can unlock even greater potential and further solidify its position as a preferred choice in various industries.

Key Market Trends

Shift Towards Environmentally Friendly Coatings

Increasingly stringent environmental regulations worldwide are pushing industries to reduce their VOC (volatile organic compound) emissions. This is driven by the need to

mitigate air pollution and protect human health and the environment. As a result, there is a growing demand for coatings that can meet these regulatory standards without compromising on performance or aesthetic appeal. Waterborne coatings, with their lower VOC content, are well-positioned to meet this demand by offering a more sustainable and environmentally friendly alternative to traditional solvent-based coatings.

In addition to regulatory pressures, growing consumer awareness about the environmental impact of products and services is also driving the shift towards environmentally friendly coatings. Consumers are becoming more conscious of their purchasing decisions and are actively seeking out products that align with their values. They are not only looking for high-quality and durable coatings but also ones that are eco-friendly and have minimal impact on the planet. This shift in consumer preferences is reshaping the coatings industry and influencing manufacturers to develop innovative solutions that are both environmentally sustainable and high performing.

The demand for waterborne coatings is expected to rise as industries seek to comply with environmental regulations and meet consumer demand for eco-friendly products. The construction, automotive, and furniture industries, among others, are increasingly adopting waterborne coatings to reduce their environmental footprint and enhance their sustainability credentials. This growing demand is likely to drive significant growth in the global waterborne coatings market, presenting opportunities for manufacturers and suppliers in this sector.

The shift towards environmentally friendly coatings is not only driven by regulations and consumer demand but also by the need for continuous innovation. Manufacturers are investing in research and development to create advanced waterborne coatings that offer better performance characteristics. These coatings are designed to have greater resistance to corrosion, enhanced adhesion to various substrates, and superior gloss retention, ensuring long-lasting protection and aesthetics. Such innovation is crucial to meet the evolving needs of industries and consumers, while also addressing sustainability challenges.

In summary, the global coatings industry is experiencing a significant shift towards environmentally friendly coatings, driven by stringent regulations, consumer awareness, and the need for innovation. Waterborne coatings, with their lower VOC content and eco-friendly properties, are gaining traction as a sustainable alternative. This transition presents both challenges and opportunities for manufacturers, as they strive to balance regulatory compliance, consumer preferences, and performance requirements in their

product offerings.

Segmental Insights

Resin Type Insights

Based on the category of resin type, the acrylic segment emerged as the dominant player in the global market for Waterborne Coatings in 2022. The demand for acrylic waterborne coatings is expected to be driven by the growing demand from infrastructure and automotive industries, as it offers glossy color retention in outdoor exposure. Additionally, the increasing applications in radiation curing and electrodeposition are likely to contribute to the substantial growth of acrylic resin-based coatings in the foreseeable future.

Polyurethane (PU) coatings are anticipated to experience a surge in demand due to their properties such as abrasion resistance, toughness, and chemical & weather resistance. This is further supported by stringent government regulations aimed at reducing VOC emissions and consistent odors, as well as a shifting consumer preference towards waterborne coatings over solvent-borne counterparts. Various forms of commercially available polyurethane coatings including oil-modified, two components, moisture curing, and lacquers are driving their demand in end-use industries such as electrical coils and automotive manufacturing.

The segment growth of ultra-low VOC, low-odor epoxy resin-based coatings is projected to be driven by increasing demand in the transportation industry and DIY flooring applications. Epoxy coatings are known for their strong adhesion and anti-corrosion resistance, making them suitable for metal surface primers. Additionally, their high heat resistance makes them widely used in electrical insulation applications, which is expected to contribute to the growth of the epoxy coatings segment in the coming years.

Application Insights

The Architectural segment is projected to experience rapid growth during the forecast period. Waterborne coatings account for a significant share of the total architectural coatings market. They are projected to experience substantial growth in the next seven to ten years due to increasing regulations aimed at reducing volatile organic compound (VOC) emissions. This regulatory push is driving the adoption of waterborne coatings in the architectural sector.

Moreover, the growth of the segment is expected to be propelled by increasing construction spending, particularly in emerging economies of Asia Pacific, Latin America, and the Middle East. The rise in income levels in these regions is leading to higher construction activities, creating a favorable environment for the expansion of the waterborne coatings market.

Additionally, the usage of acrylic-based coatings in industrial applications is on the rise, contributing to the overall growth of the market. These coatings offer excellent performance and durability, making them a preferred choice in various industries.

Furthermore, the introduction of insulation and sound-damping coatings is expected to further drive the growth of the waterborne coatings segment. These coatings provide enhanced thermal insulation and soundproofing properties, meeting the growing demand for energy-efficient and noise-reducing solutions.

Overall, the waterborne coatings market is poised for significant growth, driven by regulatory requirements, construction activities, the adoption of acrylic-based coatings, and the emergence of innovative insulation and sound-damping coatings. This presents lucrative opportunities for industry participants to capitalize on the expanding market.

Regional Insights

Europe emerged as the dominant player in the Global Waterborne Coatings Market in 2022, holding the largest market share in terms of value. The high demand for waterborne coatings in automobile OEM & refinishing work can be attributed to the presence of various major automobile manufacturers in the region. Additionally, the growing consumer preference for luxury in Europe has further fueled this demand. These factors, combined, are expected to drive the need for waterborne coatings in the automotive industry. Moreover, in terms of construction spending, the emerging economies of Asia Pacific, namely China, India, and Indonesia, are anticipated to experience the highest growth. This growth is indicative of the increasing development and infrastructure projects in these countries, presenting significant opportunities for the waterborne coatings market.

Key Market Players

AkzoNobel NV

BASF SE

Axalta Coating Systems LLC

Berger Paints India Ltd

Kansai Paint Co., Ltd.

Nippon Paint Holdings Company Ltd

PPG Industries Inc.

RPM International Inc.,

The Sherwin-Williams Company

The Valspar Corporation

Report Scope:

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

Waterborne Coatings Market, By Resin Type:

Acrylic

Polyester

Alkyd

Epoxy

Polyurethane

Polytetrafluoroethylene (PTFE)

Polyvinylidene Fluoride (PVDF)

Polyvinylidene Chloride (PVDC)

Others

Waterborne Coatings Market, By Application:

Architectural

General Metals

Automotive

Industrial

Waterborne 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 Waterborne Coatings Market.

Available Customizations:

Global Waterborne 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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