

## **Powder Coatings Market - Global Outlook & Forecast 2025-2030**

Market Report | 2025-03-26 | 303 pages | Arizton Advisory & Intelligence

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### **Report description:**

The global powder coatings market is expected to grow at a CAGR of 5.46% from 2024 to 2030.

#### Recent Developments in the Global Powder Coatings Market

- In February 2025, PPG announced a strategic partnership with SARO/Siccardi, the largest distributor of powder coatings in Italy. The collaboration aims to enhance PPG's distribution network and customer service in Italy.
- In 2023, Axalta Coating Systems launched Axalta Iruus Mix, a fully automated and completely hands-free mixing machine for the automotive refinish industry offering sustainability benefits.
- Akzo Nobel has acquired Huarun in China and the wheel liquid coatings business of Lankwitzer Lackfabrik GmbH in 2023 expanding its market presence and reinforcing its position outside the premium segment.
- In 2023, KANSAI HELIOS completely acquired German Powder Coatings and Resin producer CWS Lackfabrik GmbH. Through this, the company expanded its presence in the European market and enhanced its consumer base.

### **MARKET TRENDS & OPPORTUNITIES**

#### Shift Towards Eco-Friendly and Sustainable Practices

Industries are shifting towards powder coatings due to the growing focus on reducing carbon footprints and environmental regulations. These coatings emit very low VOCs and have a higher material utilization rate than traditional liquid coatings. This is creating opportunities for manufacturers to develop eco-friendly, bio-based powder coatings to meet demands in the powder coatings market. For instance, in February 2025, PPG is investing in powder coatings as part of its strategy to achieve 50% of sales from sustainably advantaged solutions by 2030. Additionally, in 2024, Arkema is expanding its sustainable offerings, showcasing new products at the American Coatings Show 2024 and obtaining Mass Balance ISCC+ certification at its powder coating resins facility in Spain. Meanwhile, AkzoNobel is advancing its powder coatings technology for EV batteries, further contributing to sustainable innovation in the industry. This trend opens opportunities for manufacturers to formulate an

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eco-friendly, bio-based powder coating to cater to the evolving demands of the powder coatings market.

### Growing Demand for Automotive Vehicles

The automotive industry is another big market for powder coatings. As electric vehicles (EVs) take more market share from traditional gas-fueled transportation, the sheer volume of powder needs will increase significantly. Dielectric properties of epoxy powder coatings also offer cost savings opportunities for EV battery manufacturers when compared to liquid coatings. Plus, powder coatings are more adept than liquid at handling the heat of the battery during charging. Additionally, the global automotive aftermarket is witnessing growth, as sales revenue surged by 4% last year to USD 71 billion. For instance, the rising demand for electric trucks is contributing to the growth of the powder coatings market as manufacturers seek durable and eco-friendly coating solutions. With global electric truck sales increasing by 35% in 2023 and surpassing electric buses for the first time, the need for advanced coatings has grown. China, leading with 70% of global electric truck sales, along with Europe and the U.S., where sales nearly tripled, is driving demand for protective coatings that enhance vehicle longevity and efficiency.

### INDUSTRY RESTRAINTS

#### Price Volatility in Raw Materials

Fluctuating raw material prices, particularly resins and pigments from petrochemical sources, are challenges to the powder coatings market. For instance, epoxy resins, an ingredient in powder coating, are already up 25% over last year. This increase is largely due to constrained supply from major producers in Asia, in addition to a rise in demand in industries like automotive and electronics. Volatility in global crude oil prices and supply chain disruptions can impact production costs and profitability. Manufacturers are compelled to adopt strategic procurement practices and explore bio-based alternatives to mitigate these challenges.

### SEGMENTATION INSIGHTS

#### INSIGHTS BY RESIN TYPE

The global powder coatings market by resin type is segmented into thermoset resin and thermoplastic resin. Among these, thermoset resins emerged as the dominant segment in 2024. The popularity of thermoset resins can be attributed to their excellent mechanical properties, resistance to heat and chemicals, and ability to form strong, durable coatings upon curing. These properties make them ideal for applications in the automotive, construction, and industrial equipment industries. Additionally, the use of thermoset resins provides environmental advantages since it gives minimal VOCs, aligning with the ever-growing emphasis in the industry to be more environmentally friendly. Furthermore, in the global powder coatings market, thermoplastic resins play a significant role due to their durability, chemical resistance, and recyclability. Key global manufacturers in this segment include BASF SE, Arkema S.A., Dow Inc., LyondellBasell Industries, DSM Engineering Materials, SABIC, Evonik Industries AG, Solvay S.A., and Celanese Corporation.

#### Segmentation by Resin Type

- Thermoset Resin
- Polyester
- Epoxy-Polyester Hybrid
- Epoxy
- Polyurethane
- Others

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- Thermoplastic Resin

## INSIGHTS BY THERMOSET RESIN

The largest share within the thermoset resin category was polyester resins, with more than 30% of the total revenue in 2024. The polyester-based powder coatings are widely demanded due to their cost-effectiveness, resistance to weather conditions, and multiple applications. It is widely used in both interior and exterior applications, such as automotive components, garden furniture, and architectural applications like window frames and cladding. The increase in demand for high-performance and durable coatings in the infrastructure and transport sectors remains a strong catalyst for the adoption of polyester-based powder coatings.

## INSIGHTS BY END USER

The global powder coatings market by end-user is segmented into consumer goods, automotive, general industrial, furniture, architectural, and others. The consumer goods segment accounted for the most dominant market share, showing that this segment is significant in the powder coatings market. Consumer goods applications include household appliance coatings, electronics coatings, furniture coatings, and metal goods coatings. The superior aesthetic appearance, durability, and corrosion- and scratch-resistance properties of powder coatings make them more preferred in this industry. In addition, the environmental benefits of powder coatings, such as solvent-free and low-waste products, align with the growing demand for eco-friendly products from consumers. With the manufacturer's emphasis on product longevity and aesthetic appeal, the consumer goods industry will continue to remain one of the stronger markets.

Furthermore, the automotive industry is a significant contributor to the global powder coatings market revenue. Powder coatings are increasingly being used in automotive applications because they can offer strong protection against harsh environmental conditions, such as UV exposure, salt, and road debris. The automotive industry is also increasingly focusing on sustainability and cost-effectiveness, and powder coatings offer benefits such as low environmental impact, reduced waste, and energy-efficient application processes. Also, the furniture sector is another significant end-user in the powder coatings market share. With the shift in consumer preferences toward more durable and aesthetically diverse furniture options, powder coatings are increasingly used for both metal and wooden furniture.

### Segmentation by End-User

- Consumer Goods
- Automotive
- General Industrial
- Furniture
- Architectural
- Others

## GEOGRAPHICAL ANALYSIS

The global powder coatings market presents relatively large regional variations as a result of industrial development, environmental regulations, and innovations in coating technologies. The APAC region dominated the global powder coatings market in 2024 with a revenue share of more than 38%. This dominance is essentially due to brisk industrialization, urbanization, and growing investment in the auto, construction, and consumer goods sectors, particularly in such countries as China, India, and Southeast Asia. Government moves for infrastructure support and growing requirements for green coatings and high-performance coatings are major drivers of the market in the region.

North America also holds a significant share of the global powder coatings market, driven by the growing demand for powder

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coatings in the automotive and industrial sectors. Powder coatings are encouraged due to stringent regulations on the environment, and growing awareness regarding the benefits of sustainable coatings over liquid coatings holding high percentages of VOC in it. The U.S. and Canada are major contributors with ongoing investments in advanced coating technologies to meet industry-specific requirements. Furthermore, the growth of the powder coatings market in Europe is steady and supported by stringent environmental regulations and a focus on sustainable manufacturing practices. Key markets include Germany, France, and Italy, with significant adoption in automotive, furniture, and architectural applications. This region has also focused on VOC emission reduction and the use of eco-friendly products, thereby stimulating the growth of powder coatings.

In Latin America, expansion in industry, urbanization, and investment in manufacturing industries of countries such as Brazil, Mexico, and Argentina form major growth factors for the powder coatings market. Furthermore, infrastructure development in MEA along with increasing demand for industrial activities in Saudi Arabia, the UAE, and South Africa are giving impetus to the use of powder coatings. The need for corrosion-resistant and durable coatings in the region's harsh climate further supports the powder coatings market growth. Also, Saudi Arabia holds a significant share of the market in the MEA region. The powder coatings market in Saudi Arabia is mainly driven by the construction, automotive, and industrial sectors. As the country continues to focus on infrastructure development and industrial diversification, more and more are being adopted based on the powder coatings' durability and efficiency.

### Segmentation by Geography

- APAC
  - o China
  - o India
  - o Japan
  - o Australia
  - o South Korea
  - o Indonesia
  - o Thailand
- North America
  - o The U.S.
  - o Canada
- Europe
  - o Germany
  - o The U.K.
  - o France
  - o Italy
  - o Spain
  - o Netherlands
  - o Poland
- Middle East & Africa
  - o Saudi Arabia
  - o UAE
  - o South Africa
- Latin America
  - o Brazil
  - o Mexico
  - o Argentina

### COMPETITIVE LANDSCAPE

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The global powder coatings market is highly fragmented, with numerous players operating locally and globally across multiple product lines and application industries. The top players dominating the global powder coatings market are AkzoNobel N.V., PPG Industries, Axalta Coating Systems, The Sherwin-Williams Company, Jotun Group, and BASF SE. These companies focus on high technology, especially sustainable and low-temperature curing powder coating solutions, which meet the varied demands of customers and regulatory requirements. Furthermore, strategic collaborations and partnerships have become a necessity in a competitive market environment for the expansion of markets and enhanced service offerings. Companies are investing more in R&D to develop advanced powder coating solutions with improved performance, efficiency, and environmental compliance. Advanced coating technologies, such as UV-curable and hybrid powder coatings, are gaining popularity. Strong regional positioning with a thorough acquisition and joint venture strategy is also an important maneuver by industry leaders in establishing an adequate hold on emerging opportunities. The continued focus on energy-efficient and VOC-free solutions corresponds to the trend toward a sustainable global scenario. As environmental regulations get stringent and industrial demand continues to gain strength, the competition in the powder coatings market will become more acute, leading to further innovation and cooperation.

#### Key Company Profiles

- Akzo Nobel
- PPG Industries Inc.
- The Sherwin-Williams Company
- RPM International Inc.
- Axalta Coating Systems

#### Other Prominent Vendors

- Allnex GmbH
- Arkema
- Asian Paints PPG Pvt. Ltd.
- BASF
- Berger Paints India
- Diamond Vogel
- dsm-firmenich
- Dulux
- Jotun
- Eastman Chemical Company
- Evonik
- Nippon Paint Industrial Coatings Co., Ltd
- TIGER Coatings GmbH & Co. KG
- Teknos Group
- Kansai Nerolac Paints Limited
- KCC Corporation
- Sika
- Wacker Chemie AG
- Arsonsisi S.p.A.
- ?BA Kimya A.S.
- CWS - Powder Coatings
- Erie Powder Coatings Inc.

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- Europolveri SPA
- Hentzen Coatings, Inc.
- IFS Coatings
- Keyland Polymer
- SAKS-POL
- Elite Metal Coatings
- PRISMATIC POWDERS?
- Gema Switzerland GmbH
- Keystone Coating
- Rapid Engineering Co. Pvt. Ltd.

KEY QUESTIONS ANSWERED:

- 1.□What is the growth rate of the global powder coatings market?
- 2.□How big is the global powder coatings market?
- 3.□Which region dominates the global powder coatings market share?
- 4.□What are the significant trends in the powder coatings market?
- 5.□Who are the key players in the global powder coatings market?

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