

GCC Paints and Coatings Market By Technology (Water based, Solvent based), By Resin (Acrylic, Alkyd, Polyurethane, Epoxy, Polyester, Others), By Sales Channel (Direct, Indirect), By End Use (Architectural, Industrial, Infrastructure, Others), By Country, Competition, Forecast and Opportunities, 2020-2030F

Market Report | 2025-05-30 | 133 pages | TechSci Research

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Report description:

Market Overview

The GCC Paints and Coatings market was valued at USD 20.05 billion in 2024 and is projected to grow to USD 25.51 billion by 2030, at a CAGR of 3.94%. This growth is supported by significant infrastructure development, ongoing urbanization, and increased investments in construction and industrial sectors across the six GCC member states-Saudi Arabia, UAE, Qatar, Kuwait, Oman, and Bahrain. Regional initiatives such as Saudi Arabia's Vision 2030, the UAE's Dubai 2040 Urban Master Plan, and Qatar National Vision 2030 are heavily driving demand for both decorative and industrial coatings. Decorative coatings lead the market due to strong real estate activity, while industrial coatings benefit from expansion in oil and gas, transport, and manufacturing. The region's extreme climate necessitates durable, weather-resistant solutions, prompting R&D investments. Saudi Arabia is the top contributor, followed by the UAE, with other countries also increasing their infrastructure footprints, collectively sustaining market demand.

Key Market Drivers

Infrastructure and Mega-Project Developments

A significant driver of the GCC paints and coatings market is the wave of infrastructure and urban development initiatives underway across the region. Governments-particularly in Saudi Arabia and the UAE-are committing large-scale investments to transform cities and diversify economies. High-profile projects like NEOM, The Red Sea Project, and Qiddiya are pushing demand for architectural coatings with enhanced durability and aesthetic value. The UAE's Dubai 2040 Urban Master Plan emphasizes sustainable urban development, increasing the need for coatings that meet structural and environmental specifications. Additionally, maintenance and refurbishment of aging infrastructure, especially linked to events like Expo 2020 and the 2022 FIFA

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World Cup, have created recurring demand for repainting cycles and high-performance coatings, sustaining long-term market growth.

Key Market Challenges

Volatility in Raw Material Prices

The GCC paints and coatings industry is notably impacted by the volatility in prices of imported raw materials such as titanium dioxide, solvents, resins, and binders. These fluctuations are influenced by global commodity trends, currency exchange variations, and geopolitical instability. Rising transportation and energy costs further inflate expenses. With most materials sourced from Europe and Asia, any disruptions-such as supply chain delays or trade restrictions-can lead to shortages and elevated costs. Intense market competition limits the ability of manufacturers to fully pass these costs onto customers, squeezing margins. As central banks worldwide tighten monetary policies, procurement costs rise, affecting not only manufacturers but also developers and contractors, who may deprioritize premium coatings. While strategies like backward integration and local production are being explored, these require long-term investment, and price volatility remains a pressing challenge.

Key Market Trends

Growth in Infrastructure and Mega Projects Under Vision 2030

A major trend in the GCC paints and coatings market is the escalating demand driven by Saudi Arabia's Vision 2030 and its portfolio of large-scale urban and infrastructure projects. Developments like NEOM, The Line, and Red Sea Global are boosting the requirement for specialized coatings across decorative, protective, and industrial applications. With Saudi Arabia alone committing over \$3 trillion to infrastructure by 2030, the demand spans residential, commercial, and tourism sectors. The UAE continues to build on Expo legacy projects and national rail expansions, while Qatar, Oman, and others advance their development plans under long-term visions. The use of advanced coatings for aesthetics and functionality in buildings, bridges, and tunnels is rising. To meet project specifications and timelines, manufacturers are localizing production and forging early-stage partnerships with contractors. This infrastructure-driven trend is expected to strongly influence market dynamics through the forecast period.

Key Market Players

- Akzo Nobel NV
- Jazeera Factory for Paints
- BASF SE
- Berger Paints Emirates Ltd
- Jotun U.A.E. Ltd. (L.L.C.)
- Ritver Paints Manufacturing L.L.C
- National Paints Factories Co. Ltd
- Hempel A/S
- Wacker Chemie AG
- Terraco UAE Ltd

Report Scope:

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

- GCC Paints and Coatings Market, By Technology:
 - o Water based
 - o Solvent based
- GCC Paints and Coatings Market, By Resin:
 - o Acrylic
 - o Alkyd
 - o Polyurethane
 - o Epoxy
 - o Polyester
 - o Others
- GCC Paints and Coatings Market, By Sales Channel:

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- o Direct
- o Indirect
- GCC Paints and Coatings Market, By End Use:
 - o Architectural
 - o Industrial
 - o Infrastructure
 - o Others
- GCC Paints and Coatings Market, By Country:
 - o Saudi Arabia
 - o United Arab Emirates
 - o Qatar
 - o Kuwait
 - o Bahrain
 - o Oman

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the GCC Paints and Coatings Market.

Available Customizations:

GCC Paints and Coatings Market report with the given market data, TechSci 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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