

Indonesia Paints and Coatings Market Assessment, By Resin [Acrylic, Alkyd, Epoxy, Polyester, Polyurethane, Vinyl, Fluoropolymer, Others], By Technology [Water Based, Solvent Based, Powder Based, Others], By End-user Industry [Construction, Automotive and Aerospace, Industrial Equipment, Furniture and Wood Products, Consumer Goods, Packaging, Others], By Region, Opportunities and Forecast, 2018-2032F

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Report description:

Indonesia paints and coatings market is expected to grow at a CAGR of 6.50% during the forecast period 2025-2032. The market size will grow from USD 4.23 billion in 2024 to USD 7.01 billion in 2032, led by fast-growing construction with initiatives from the government towards the development of housing and infrastructure. High-performance paints and coatings for both residential and commercial applications are growing as urbanization continues to keep rising. Additionally, the rising focus on sustainability increasing attention on green and low VOC paints and coatings driven by conscious consumers with increasing concern for their surroundings and compliance with increasingly tighter regulations. Technological advancements such as waterborne coatings and intelligent technologies play an important role here, enhancing product performance and attractiveness.

In January 2025, the Indonesian government approved a budget of USD 2.99 billion for the second phase of the development of Nusantara from 2025 to 2029. The budget will focus on constructing supporting facilities and office ecosystems for the legislature and judiciary agencies. This budget also includes the cost of maintaining and managing infrastructure and facilities during the operation process.

Water-Based Paint Coatings Witness Rapid Growth in Indonesia

Water-based coating is witnessing rapid growth in Indonesia, driven by increasing demand across architectural, automotive, and

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industrial applications. Their eco-friendly nature, low VOC emissions, and excellent performance characteristics align with the country's focus on sustainable development. Rising urbanization, government infrastructure initiatives like housing programs and metro expansions, and the booming automotive sector further fuel their adoption. Additionally, advancements in waterborne coating technologies enhance durability, adhesion, and environmental stability, making them a preferred choice for diverse industries. Furthermore, the water-based anti-leak coating paints compliance with rigorous quality and safety align with the national standards authority. These coating paints are achieving SNI certification that not only demonstrates the product's consistent quality and reliability but also enhances consumer confidence and market competitiveness. The recognition is expected to encourage broader adoption of certified water-based anti-leak coatings in Indonesia's construction and infrastructure sectors, supporting higher standards for building protection and environmental responsibility.

In January 2024, Aquaproof and Aquaproof received the Indonesia National Standard certification for Water-Based Anti-Leak Coating Paint certification from PT IAPMO Group Indonesia. This follows Aquaproof Pro's Green Label certification from the Singapore Environment Council. The certification demonstrates Aquaproof and Aquaproof Pro's consistent quality management system and compliance with Indonesian National Standards.

Rising Demand for Durable and Long-Lasting Paints Driving the Demand in Indonesia

The ever-growing need for long-lasting, durable paint significantly propels the growth in Indonesia's demand for paints and coatings. Along with the increased government efforts towards infrastructure development, construction activity fueled by urbanization creates an absolute requirement for regionally robust and resistant coatings against tropical weather. Consumers, as well as builders, increasingly seek paints that offer greater durability over a period of time with lower repainting frequencies and the cost of maintaining them. This trend especially manifests in domestic and commercial undertakings, as long-lasting finishes are very fundamental to aesthetic maintenance and structural performance. This sustainability awareness also transforms purchasing decisions, wherein consumers go for eco-friendly options that cannot compromise quality. With this, the manufacturers are working to innovate new product lines into advanced formulations to increase durability while showing responsibility towards nature.

In August 2024, Asian Paints, one of the world's top coatings companies, partnered with creative agency Moonfolks to launch the Infinito System, a five-product line designed to address common wall issues in Indonesia. The campaign managed by Moonfolks aims to minimize the need for frequent repaints and tap into Indonesia's digitally savvy consumers through social media and influencer partnerships. A five-year money-back guarantee backs the campaign and features vibrant, consumer-friendly packaging.

Growing Adoption of Bio-Based Paints in Indonesia

Increasing environmental awareness and reducing carbon footprints drive the demand for bio-based paints in Indonesia. These paints, formulated with renewable materials like vegetable oils and plant resins, offer eco-friendly alternatives to conventional petroleum-based coatings. They significantly lower VOC emissions and contribute to sustainable practices, aligning with global and local regulations on environmental protection. Additionally, advancements in bio-based chemistry have made products more durable and better performing, and convenient for applying for different uses in residential, commercial, and industrial applications. As consumers shift their preference towards greener products, bio-based paints are increasingly becoming a vital component of Indonesia's growing paints and coatings industry.

In January 2023, Indonesia's Mowilex has developed a bio-based paint called Naturalle, which contains 28% renewable raw materials and removes formaldehyde from indoor air. The water-based acrylic binder is made from 28% natural ingredients sourced from seeds, stalks, and grasses, reducing the need for petroleum-derived polymers and lowering the product's carbon footprint. Naturalle also improves air quality by absorbing formaldehyde from building materials, cleaning products, and lacquers, which can cause eye and nose irritation, asthma attacks, and cancer risk.

Western Region Dominates the Paints and Coatings Market in Indonesia

Western Indonesia, particularly in regions like Jakarta and West Java, is a prime location for the paints and coatings industry due to its robust economic activities and urbanization. The region is blessed with heavy concentrations of construction activities fueled by government initiatives to improve infrastructure and housing. The development projects in Jakarta involve transportation systems and residential complexes, which heavily boost the demand for a broad range of coatings used in these applications. Western Indonesia also has an active automotive sector, further supporting the paints and coatings industry. The presence of

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numerous automobile manufacturers and suppliers guarantees a steady demand for protective and decorative coatings applicable to vehicles. The economic development in this region is complemented by rising disposable incomes, which lead to enhanced vehicle ownership and customization philosophies. With sustainability now a priority, Western Indonesian manufacturers are changing their product lines to include environmentally friendly low-VOC paints that are appropriate for consumer orientations and regulatory requirements. This shift not only enhances brand reputation but also puts companies in good standing in an increasingly competitive market environment.

Future Market Scenario (2025-2032F)

- An increase in consumption of low volatile organic compounds (VOC) as well as water-based paints arises with growing environmental consciousness and new restrictions on certain hazardous materials.
- Decorative Coatings Growth-Residential Decorative paints in the residential segment are gaining in demand due to increased spending on interior and exterior renovations by homeowners, led by the popularity of home decor and design.
- Innovative paint technologies like self-cleaning and anti-bacterial coatings are being adopted more widely for both residential and commercial purposes to increase product performance and durability.
- The growth of e-commerce platforms and home improvement stores makes paints and coatings more easily accessed by consumers, creating easier options to buy and more opportunities to penetrate the market.

Key Players Landscape and Outlook

Indonesia's paints and coatings industry is a competitive industry led by a handful of big players who together have a significant market share. The players are spread across various segments like architectural, industrial, and automotive coatings and are investing heavily in research and development to launch innovative products in an effort to address evolving consumer needs as well as policies. Besides this, the emphasis on sustainability is forcing manufacturers to launch low-VOC and eco-friendly products as a part of global environmental initiatives. Besides this, technological upgradation gives the products depth, and innovations like smart coatings with self-healing properties and enhanced durability are finding fast acceptance. Besides this, Indonesia's urbanization and infrastructure development are set to continue driving demand for paints and coatings in the residential as well as commercial segments. With the players investing in research and development to launch high-performance products, the market is set to experience good growth.

In 2023, PT Avia Avian Tbk began construction of a new production facility in Cirebon, aiming to increase the company's production capacity and respond to future opportunities. The third plant, currently under construction, is expected to be completed in 2025 and has a planned production capacity of 225,000 MT, surpassing the capacity of Serang and Sidoarjo. The plant, which will have a built-up area of 11 hectares, is currently in the process of installing foundation piles. The construction of this plant is seen as a positive signal for AVIA, strengthening its position as a market leader in the paint and coatings industry. The plant's initial phase will focus on wall paint production, with capacity gradually increasing as needed. The construction of this plant is a significant factor in AVIA's growth and market share in Indonesia's paint and coatings industry.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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