

**Japan 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, FY2019-FY2033F**

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**Report description:**

Japan paints and coatings market is expected to grow at a CAGR of 4.84% during the forecast period FY2026-FY2033. The market size will grow from USD 9.48 billion in FY2025 to USD 13.83 billion in FY2033, driven by rising demand in the construction, automotive, and industrial sectors. Growing renovation activities to enhance aesthetics, adoption of eco-friendly and VOC-free coatings, and advancements in waterborne and powder-based technologies are emerging as the key forces for market growth in Japan. Additionally, the shift toward sustainable practices, such as green coatings using natural ingredients, aligns with stringent environmental regulations and increasing consumer awareness. Furthermore, the automotive industry significantly contributes to market expansion by using durable coatings that resist corrosion and abrasion. Moreover, government initiatives promoting infrastructure development and extensive research in innovative coating solutions further fuel market growth.

In March 2025, Nippon Paint Automotive Coatings (Nippon Paint Holdings Co., Ltd.) and Uchihama Kasei Co., Ltd. created the first in-mold coating technology in Japan for big thermoplastic automotive body parts. The technology combines molding and painting, removing paint booths and ovens, and reducing CO<sub>2</sub> emissions by 60% and VOCs close to zero. It employs solvent-free paint with under 4g VOC per liter, great durability, and environmentally friendly characteristics. It provides high surface quality and detailed replication of patterns and textures. They intend to introduce this innovation to car manufacturers for mass production in the

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future.

#### Construction and Renovation Boom Fuels the Paints and Coatings Market in Japan

The paints and coatings market of Japan is seeing significant growth, for which the primary mover has been a boom in construction and renovation. The continued expansion in the construction sector is a significant driving factor for this market, as there is increased infrastructure development and housing projects. There is also a significant increase in renovation work, as house owners look to beautify their homes, a trend that has been spurred by the increasing costs of new homes and government programs promoting the use of old structures. This has manifested in significant home renovation orders in recent times, which speaks to the huge demand for paints and coatings. Moreover, the industry is shifting towards environmental sustainability, as consumers increasingly prefer eco-friendly products such as waterborne and low-VOC coatings that comply with stringent environmental regulations. Self-healing coatings and functional coatings with specific features such as anti-microbial properties and features of thermal insulation are also developed and put into a market as great options, improving durability and aesthetic values.

Japan's demand for renovation and remodeling is increasing due to rising prices, housing policy shifts, and the country's goal to become carbon neutral by 2050. With 8.49 million empty homes and a 13.8% vacancy rate, the government is considering tax incentives and revisions. In the first half of 2023, home renovation orders exceeded USD 9.65 million, expanding opportunities for housebuilders and housing equipment companies. Younger generations are opting for cost-effective renovations due to financial constraints and modern living spaces.

#### Technological Innovation in the Automotive Coating Drives the Coatings Market in Japan

Technological innovation in automobile coatings is a crucial force driving the coatings market in Japan. Technological advancement showcases the commitment to making automotive performance more effective. The automotive industry demands better solutions with superior durability, corrosion resistance, and an aesthetic appeal of advanced coatings while it continues its development process. Additionally, the demand is more apparent in the increasing adoption of electric and hybrid vehicles, which have stringent environmental standards to meet in terms of specialized coatings that resist harsh environmental conditions. Lately, waterborne and low-VOC (volatile organic compounds) coatings have gained more popularity, especially because of their reduced environmental impact and compliance with Japanese regulatory standards. Moreover, the technologies not only enhance modern vehicles to satisfy performance requirements but also respond to consumer demands for environmentally friendly products. The manufacturers are investigating ways to improve coating application techniques and formulations in order to produce high-quality coatings efficiently.

Nissan is testing an innovative automotive paint to lower summer cabin temperatures and reduce air-conditioning system energy usage. The paint, developed in partnership with Radi-Cool, uses metamaterial, synthetic composite materials with unique properties. The project aims to create a cleaner, more sustainable society. Nissan began a 12-month feasibility trial at Tokyo International Air Terminal in November 2023, applying the paint to a Nissan NV100 service vehicle. The results have been impressive, showing a 12-degree Celsius reduction in exterior surface temperatures and a 5-degree Celsius cooler interior compared to traditional automotive paint.

#### Water-Based Paint is Witnessing the Fastest Growth

Water-based paint is growing rapidly in Japan due to environmental regulations, technological improvements, and further consumer preference. Stricter regulations over volatile organic compound (VOC) emissions triggered by an increasing need for sustainability through environmental requirements have made manufacturers create alternative environmentally friendly products. The continuous development in the coating technology of waterborne paint has made them extremely strong and resistant, offering better performance in various applications, such as automotive and industrial. Furthermore, people are looking at environmentally friendly products, and there is the case of non-toxic paints as compared to conventional solvent-based paints, thereby leaving fresher air in houses. Waterborne solutions have emerged very strongly in architectural coatings. However, especially for residential buildings, sustainable material inputs are much preferred. Combining all these factors led to increasing demand for water-based paints in every sector.

In December 2024, the Japanese firms CN Arts Co., Ltd. and Japan Nanotech Co., Ltd. together developed and marketed "ARITERAS KPC," the first photocatalytic coating for consumer products in Japan. This coating material is robust enough for manufacturers' quality standards, so it can be applied to products such as electronics, furniture, and auto parts. Unlike past

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photocatalysts, ARITERAS KPC does not contain hazardous material that requires special handling for global exporting. It provides long-lasting antibacterial and antiviral effects under light, too, and has earned SIAA certification for effectiveness. It seeks to promote a sustainable society by eliminating CO<sub>2</sub> emissions during production and delivering lasting hygienic effects.

#### Central Region Dominating the Paints and Coatings Market in Japan

The Kanto region, which constitutes Tokyo, holds the majority position in Japan's paints and coatings market. This is because the Kanto region is the country's most populated and economically powerful region. Owing to high residential and commercial construction activities, Kanto has a concentrated level of development in all types. The growth in demand for paints and coatings in Tokyo due to infrastructure developments, urban revamps, and preparations for global events such as the Tokyo Olympics cannot be underestimated. Another reason for the growth of the market is the high presence of automotive industries in the region. Major paint and coating manufacturers are also present in the Kanto region, which offers easy access to raw materials and advanced manufacturing facilities. This strategic advantage further consolidates Kanto's position as the leading region in the market. High population density and economic activity in the region also contribute to the demand for decorative coatings for residential and commercial properties. Also, the Kanto region is also characterized by significant research institutions and universities that would facilitate innovation as well as developing new coating technologies.

According to the Japan Paint Manufacturers Association 2024 annual publication, the Kanto-Koshinetsu region held the top position in the paint market of Japan, with a 34.8% market share by volume and 34.5% by value of the country's total paint demand. It owes its top position mainly to the wide urbanization and infrastructure projects of this region, especially around the Tokyo metropolis, that generate a huge demand for architectural coatings and industrial coatings.

#### Future Market Scenario (FY2026-FY2033F)

□ The introduction of smart coatings with self-cleaning and anti-microbial properties, addressing the growing demand for hygiene and maintenance-free surfaces.

□ Increasing adoption of eco-friendly and sustainable coating solutions, driven by regulatory requirements and consumer preferences.

□ Expansion of the automotive refinish market driven by vehicle maintenance and repair needs, particularly as the number of vehicles on the road continues to grow.

□ Growth of the powder coatings segment due to its environmental benefits, superior performance, and the elimination of VOC emissions.

□ Development of nano-coatings for enhanced durability, specific functionality, and potential applications in a wide range of industries, including electronics and healthcare.

□ Advancements in bio-based coatings, offering a renewable alternative to traditional petroleum-based products, and aligning with the global shift towards sustainability.

#### Key Players Landscape and Outlook

The leaders in the market for Japanese paints and coatings are expected to see maximum gains from the emerging opportunities driven by rapidly advancing urbanization, infrastructures, and increasing demand for eco-friendly products. Such leading players in the industry are also turning towards increased research and developments to innovate and present innovative, eco-friendly paint technologies, such as low-VOC and waterborne coatings. Besides, strategic investments in increasing manufacturing capacities and strengthening distribution networks are helping these companies service their respective residential, commercial, and industrial segments. These market leaders are able to sustain themselves in the fast-changing Japanese paints and coatings scenario by offering their products according to global trends and customer requirements.

In November of 2024, Nippon Paint Holdings Co., Ltd, launched a new product under a new branding; the product comes with brand-innovated unique paint film and an ecofriendly formula aiming for consumers to finally enjoy this film viewing that came with an unprecedented "unbounded giant screen" experience. Over the past few years, with the post-90s generation slowly becoming the major driving force behind family life, home projectors are slowly being accepted by young generations, particularly among younger consumers in cities, to view their favorite programs in their living rooms, which replaced the earlier usage of conventional television sets. Nippon, the prominent paint company, launched its newest offering called Nippon Projection Paint in the official capacity. The product is intended for home projection scenes. This film, using Nippon's distinctive paint film technology

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and a fully environmentally friendly formula, will create a home "curtain" of true colors in the hope that consumers will enjoy the new film and television viewing experience brought by the "big screen without boundaries."

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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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