

Coalescing Agents Market Growth Analysis - Forecast Trends and Outlook (2025-2034)

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Report description:

The global coalescing agents market size is estimated to increase from USD 1.53 Billion in 2024 to USD 2.42 Billion by 2034, growing at a CAGR of 4.70% between 2025 and 2034.

The coalescing agents market is witnessing robust growth, driven by increasing demand in sectors like construction and automotive. These agents are essential in high-performance coatings, aiding in film formation and enhancing the durability of paints and coatings. Their use in water-based formulations is particularly notable, as they contribute to eco-friendly, efficient products. Oxea has introduced Oxfilm 351, a next-generation, virtually odourless, non-VOC coalescing agent. With a boiling point of 351C, it minimally impacts VOC content and is 10-20% more efficient in reducing MFFT than other agents, suitable for various latex and coatings. As industries continue to prioritise sustainability and performance, coalescing agents are becoming a vital component, supporting market expansion and meeting the evolving needs of various applications.

Coalescing Agents Market Trends

In the coalescing agents market, the ink industry is experiencing a shift towards water-based formulations, driven by environmental concerns. These formulations improve ink adhesion and enhance durability in printing applications. Coalescing agents support the dispersion of pigments and dyes, ensuring optimal performance. As sustainability and performance continue to be key priorities, coalescing agents are becoming essential in developing high-quality, durable inks for diverse printing needs.

The coalescing agents market is witnessing growth in the personal care products sector. These agents are increasingly used in formulations for creams, lotions, and hair care products to enhance texture, spreadability, and moisturizing properties. Coalescing agents improve emulsions, ensuring better consistency and performance, which drives demand for more effective and appealing personal care products with superior skin and hair benefits.

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The market is shifting towards advanced coalescing agents, low-VOC solutions, especially for high-performance applications. These agents are gaining traction in cost-sensitive markets, offering effective performance while meeting environmental regulations. Studies show that coalescing agents like TMPiB, with lower water solubility, efficiently reduce the glass transition temperature, enhancing film formation in coatings.

Product Insights

The coalescing agents market is seeing a rise in hydrophilic-based products, capturing a significant revenue share. These agents reduce volatility compared to hydrophobic coalescing agents, improving performance in water-based paints and coatings, especially on porous substrates through diffusion. Hydrophilic coalescents like PB and DPB offer medium to low volatility, improve open time, enhance freeze-thaw stability, control water evaporation, and partially dissolve polymers after water evaporation for better performance.

Hydrophobic coalescing agents are vital in the global market, particularly for waterborne coatings. They promote film formation by aiding the fusion of individual polymer particles, ensuring a cohesive film and smooth continuous coating. These agents assist in merging various components, including pigments, binders, and solvents, to enhance durability. By reducing volatile organic compounds (VOCs), hydrophobic coalescing agents support the development of eco-friendly solutions. As demand grows in environmentally conscious industries, these agents provide a sustainable alternative, improving both the performance and longevity of coatings without compromising on environmental standards.

Application Insights

The coalescing agents market is experiencing significant growth, particularly in paints and coatings. Water-based paints and coatings are gaining market share due to their environmental benefits. Coalescing agents enhance film formation, improving the durability and performance of coatings. These agents are crucial in developing high-quality paints and coatings, contributing to increased revenue share in the overall market by meeting both sustainability and performance demands.

In the coalescing agents market, latex paint formulations rely on these agents to help polymer particles fuse, ensuring the formation of a continuous and cohesive film. Coalescing agents are chemicals that enable latex paint particles to blend into a continuous film, enhancing the paint's durability and performance. This improves the quality of the paint film, enhancing the performance of acrylic and vinyl paints by providing better durability and finish in various applications.

Regional Insights

The coalescing agents market in North America is expanding, driven by stringent environmental regulations favouring water-based coatings over solvent-based alternatives. These agents help reduce volatile organic compounds (VOCs) and promote eco-friendly coatings, particularly in the construction and automotive industries. In 2022, the U.S. chemical industry accounted for over 25% of GDP, with USD 486 billion in output, manufacturing 96% of domestic goods and producing 13% of global chemicals. As demand for high-performance coatings grows, coalescing agents improve both durability and aesthetic appeal, fulfilling the increasing need for sustainable and high-quality finishes.

Asia Pacific Coalescing Agents Market Trends

The coalescing agents market in Asia Pacific is experiencing significant growth, capturing a large revenue share of the global market. The region's demand for industrial coatings and architectural coatings is increasing, driven by rising infrastructure and industrial activities. As highlighted by Coatings World, the paint and coatings market in Asia Pacific is expanding, with key end-use industries like construction and automotive contributing to this growth. The construction industry is a cornerstone of China's

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national economy, with a total output value surpassing 31 trillion yuan (USD 4.34 trillion) in 2022, and offering employment to over 52 million people. The demand for high-performance coatings continues to drive the need for effective coalescing agents, reinforcing their importance in the region's coatings market.

The China coalescing agents market significantly influences the Asia Pacific coatings market, capturing a notable geographic share. Japan plays a central role in this growth, with increasing demand for high-performance coatings. Japan's coatings industry, alongside Korea (including South Korea as a distinct entity), is contributing to the rising need for coalescing agents, driving market expansion throughout the region.

Europe Coalescing Agents Market Trends

The coalescing agents market is witnessing significant growth, driven by the increasing demand for cosmetics and personal care products. Cosmetic Europa remains a key player in the global flagship market, where retail sales play a vital role in determining price and value. In 2023, Europe's cosmetics and personal care industry is valued at EUR96 billion in retail sales, establishing it as a key global flagship market for these products. The cosmetics and personal care industry continues to thrive, contributing to the European economy and shaping the cosmetic industry future.

Key Coalescing Agents Company Insights

The coalescing agents market is expanding, driven by key players such as Evonik Industries AG, Elementis Plc, Synthomer Plc, Celanese Corporation [NYSE: CE], and Croda International Plc. These companies are at the forefront of developing innovative solutions, contributing significantly to the growth of the coalescing agents sector across various industries.

Evonik Industries AG

Evonik Industries AG, headquartered in Essen, Germany, was established in 2007. It is a global leader in specialty chemicals, focusing on innovation in various sectors, including chemicals, healthcare, and nutrition. The company is committed to sustainability, providing solutions that enhance quality of life and meet global demands.

Elementis Plc

Elementis Plc, based in London, UK, was founded in 1844. The company is a global speciality chemicals producer, serving industries like personal care, coatings, and oilfield services. Elementis is renowned for its innovation in creating high-performance ingredients and sustainable solutions, enhancing the performance of everyday products.

Synthomer Plc

Synthomer Plc, established in 2006 and headquartered in London, UK, is a leading global supplier of aqueous polymer solutions. It serves industries like construction, textiles, and healthcare. Synthomer focuses on producing sustainable and innovative materials that improve product performance and contribute to environmental responsibility.

Celanese Corporation [NYSE: CE]

Celanese Corporation, founded in 1918 and headquartered in Irving, Texas, USA, is a global technology and materials company. It manufactures engineered materials and chemicals, focusing on sustainability, innovation, and efficiency across industries such as automotive, electronics, and pharmaceuticals, offering solutions that improve everyday life.

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Croda International Plc, founded in 1925 and headquartered in Snaith, UK, is a global speciality chemicals company. Croda develops innovative ingredients for industries like personal care, healthcare, and agriculture. With a strong commitment to sustainability, it aims to deliver high-quality solutions that enhance the performance of consumer products.

- ? Cargill, Incorporated
- ? Arkema Group
- ? Stepan Company
- ? Runtai New Material Co., Ltd.
- ? ADDAPT Chemicals B.V.
- ? Patcham
- ? Chemoxy International
- ? Hallstar
- ? Krishna Antioxidants Pvt. Ltd.
- ? Dow
- ? Deborn
- ? BASF SE
- ? Others

Recent Developments

January 2025

DALPAD? A Plus Coalescing Agent won the BIG Innovation Award in the Transformative Products category. This low-SVOC, low-odor additive improved coating performance, indoor air quality, and worker safety. It reduced the minimum film-forming temperature, provided stability after temperature fluctuations, and enhanced crack resistance and durability.

October 2024

Evonik Oxeno expanded its production capacities for INA-based plasticizers, ELATUR? CH (DINCH) and ELATUR? DINCD, in response to rising demand. The expansion, integrated into existing C4 plants in Marl, aimed to ensure reliable European supply and high delivery quality, while supporting sustainability with biobased and circular raw materials.

November 2023

IMCD India purchased two business lines from CJ Shah & Company, including products like Cellulose Acetate Butyrate, Coalescing Agent, and Polyolefin Polymers. Valued at INR 2,300 million, the acquisition aimed to boost IMCD India's presence in coatings and construction, addressing India's rising demand.

October 2023

Henkel began construction of a new EUR120 million adhesive facility in Yantai, China. The Kunpeng plant will increase production capacity for high-impact adhesives, support growing demand, and focus on sustainability by using renewable energy and reducing CO2 emissions across industries such as electronics and automotive.

Global Coalescing Agents Market Report Segmentation

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The global coalescing agents market report provides a comprehensive analysis of industry trends and revenue growth at global, regional, and country levels. It covers key sub-segments based on product, application, and region, offering valuable insights into the market's performance and future projections across different sectors.

Product Outlook (Revenue, Billion, 2025-2034)

- ? Hydrophilic Coalescing Agent
- ? Hydrophobic Coalescing Agent

Application Outlook (Revenue, Billion, 2025-2034)

- ? Paints and Coatings
- ? Adhesive and Sealants
- ? Inks
- ? Personal Care Ingredient
- ? Others

Region Outlook (Revenue, Billion, 2025-2034)

- ? North America
 - ??? United States of America
 - ??? Canada

- ? Europe
 - ??? United Kingdom
 - ??? Germany
 - ??? France
 - ??? Italy
 - ??? Others

- ? Asia Pacific
 - ??? China
 - ??? Japan
 - ??? India
 - ??? ASEAN
 - ??? Australia
 - ??? Others

- ? Latin America
 - ??? Brazil
 - ??? Argentina
 - ??? Mexico
 - ??? Others

- ? Middle East and Africa

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??? Saudi Arabia
??? United Arab Emirates
??? Nigeria
??? South Africa
??? Others

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