Acrylic Emulsions - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 120 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License $4750.00
- Team License (1-7 Users) $5250.00
- Site License $6500.00
- Corporate License $8750.00

Report description:

Acrylic Emulsions Market Analysis

The Acrylic Emulsions Market size is estimated at USD 11.94 billion in 2025, and is expected to reach USD 15.61 billion by 2030, at a CAGR of 5.51% during the forecast period (2025-2030). Regulatory pressure that favors water-borne formulations, steady infrastructure spending in Asia-Pacific, and rapid adoption of digital printing technologies underpin this expansion. Paint makers, adhesive formulators, and paper converters continue to switch from solvent to water-borne systems to secure compliance with low-VOC rules in the United States, Canada, and the European Union. At the same time, manufacturers are investing in self-crosslinking and PFAS-free chemistries to capture premium niches, while capacity additions in the United States and the Netherlands safeguard supply security. Though feedstock price volatility presses margins, technology upgrades and sustainability commitments provide headroom for value-based pricing, enabling producers to preserve profitability even when monomer costs fluctuate.

Global Acrylic Emulsions Market Trends and Insights

Low-VOC Push for Water-Borne Paints and Coatings

California continues to cap VOC content for flat architectural paint at 50 g/L, compelling formulators to phase out solvent-rich chemistries. The United States Environmental Protection Agency extended aerosol coating compliance dates to January 2027, granting producers time to perfect water-based blends that match solvent-borne performance. Canada enforced VOC limits across

130 consumer product categories in January 2024, reinforcing a global regulatory shift that channels demand toward acrylic emulsions. Producers are therefore scaling self-crosslinking systems that raise film hardness without external crosslinkers, widening the addressable market. These policy moves give the acrylic emulsions market multi-year visibility and help offset monomer-cost swings.

Booming Construction Spending in Developing Countries

China's 2025 budget maintains a 5% GDP growth target, supported by USD 1.11 trillion in infrastructure outlays, while India increased 2025-26 capital expenditure by 11.1% to INR 11.11 lakh crore. New highways, metros, and industrial parks lift consumption of architectural coatings, concrete additives, and flexible packaging adhesives that employ acrylic dispersions. Across Southeast Asia, manufacturing relocations drive factory construction, magnifying volumes. Because acrylic emulsions provide durability, adhesion, and low odor, they remain the binder of choice for builders that must meet tightening environmental standards. Rising middle-class income levels also spur residential repaint cycles, keeping baseline demand resilient.

Preference for Polyurethane Dispersions

Water-borne polyurethane dispersions often outclass acrylics in chemical and abrasion resistance, allowing them to gain ground in automotive trim, wood flooring, and heavy-duty metal coatings. Recent research on 2K UV-curable polyurethane chemistries highlights breakthroughs in low-emission performance. While acrylics answer with hybrid designs and self-crosslinking networks, the gap in very high-stress environments remains, capping share growth in select premium niches. Yet acrylics retain cost and process advantages in the mid-performance tier, ensuring balanced competition rather than outright displacement.

Other drivers and restraints analyzed in the detailed report include:

Digital Ink-Jet Printing Inks Adoption / Shift to Food-Grade Flexible-Pack Adhesives / Acrylic Monomer Price Volatility /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Styrene-acrylic grades held 45.18% of global revenue in 2024. Their balanced hardness, water resistance, and price position them as the workhorse for interior architectural paint and paper saturation lines. Through 2030, styrene-acrylic volumes will climb steadily, but the segment's share will edge downward as users diversify into vinyl-rich systems. Vinyl-acrylic emulsions are set to grow 6.22% annually, riding demand for flexible construction adhesives, sealants, and low-temperature coated boards. Pure acrylics command the premium tier, favored in high-gloss exterior walls and cool-roof elastomeric where colour retention and UV durability are paramount.

Advanced self-crosslinking technologies reinforce this hierarchy. Studies show DAAM-ADH networks in styrene-acrylic road sealants boost bond strength by more than 50% over conventional grades. Producers market modular platforms that let customers fine-tune Tg and hardness with minimal lab reformulation, saving time to market. Meanwhile, vinyl-acrylic suppliers stress plasticizer-free flexibility that withstands thermal cycling in laminate flooring and weather-barrier membranes. Pure acrylics leverage bio-based monomer options to target sustainability-conscious architects, widening the value gap versus lower-priced chemistries.

The Acrylic Emulsions Market Report is Segmented by Type (Pure Acrylic Emulsion, Styrene Acrylic Emulsion, and Vinyl Acrylic Emulsion), Application (Paints and Coatings, Construction Material Additives, and More), and Geography (Asia-Pacific, North America, Europe, South America, and Middle-East and Africa). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

Asia-Pacific contributed 46.21% of global revenue in 2024 and will post a 6.09% CAGR to 2030. China's Verbund site expansions supply local binders for booming public-works paint consumption, while India's elevated capex pipeline translates directly into fresh commercial and residential floor space. ASEAN members such as Vietnam and Indonesia host export-oriented furniture and packaging clusters that rely on water-borne coatings to meet OECD buyer standards. The region also houses world-scale feedstock plants, enabling integrated players to balance cost pressure and drive economies of scale.

North America remains a regulatory trendsetter. The EPA's revised aerosol rules and CARB's low-VOC caps force continuous R&D investment, yet they simultaneously defend incumbents with proven compliance credentials. Infrastructure renewal under the U.S. Infrastructure Investment and Jobs Act pumps spending into bridges, transit hubs, and public buildings, all of which favor durable, low-odor coatings. Canada's country-wide VOC regulations, effective 2024, harmonize requirements and simplify cross-border product portfolios. Mexico's maquiladora network attracts appliance and automotive manufacturers that specify water-borne finishes to secure export approvals.

Europe emphasizes sustainability leadership. BASF's shift to bio-based ethyl acrylate and the Dutch dispersion expansion illustrate the region's drive to decarbonize the chemicals value chain. Germany supports cool-roof retrofits through building-efficiency subsidies, widening the market for reflective acrylic membranes. France and the United Kingdom promote circular-economy criteria in public procurement, favoring resins with life-cycle-assessment backing. Although South America and the Middle-East and Africa together represent less than 10% of global consumption, rising urbanization and increased access to mortgage financing encourage residential repainting and infrastructure projects, providing long-run upside.

List of Companies Covered in this Report:

AICA Kogyo Co.Ltd. / AkzoNobel N.V. / Allnex GMBH / Anhui Sinograce Chemical Co., Ltd. / Arkema / Asian Paints Ltd. / Axalta Coating Systems LLC / BASF / Celanese Corporation / DIC Corporation / Dow / Gellner Industrial, LLC. / H.B. Fuller Company / Lubrizol / Mallard Creek Polymers / Nippon Paint Holdings Co., Ltd. / Osaka Organic Chemical / PPG Industries, Inc. / Synthomer plc / The Cary Company /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

Table of Contents:

4.2.1 Low-VOC Push for Water-Borne Paints and Coatings
4.2.2 Booming Construction Spending in Developing Countries
4.2.3 Digital Ink-Jet Printing Inks Adoption
4.2.4 Shift to Food-Grade Flexible-Pack Adhesives
4.2.5 Cool-Roof and Reflective Coatings Demand
4.3 Market Restraints
4.3.1 Preference For Polyurethane Dispersions
4.3.2 Acrylic Monomer Price Volatility
4.3.3 UV-Yellowing of Styrene-Rich Emulsions
4.4 Value Chain Analysis
4.5 Porter's Five Forces
4.5.1 Bargaining Power of Suppliers
4.5.2 Bargaining Power of Consumers
4.5.3 Threat of New Entrants
4.5.4 Threat of Substitutes
4.5.5 Degree of Competition

5 Market Size and Growth Forecasts (Value)
5.1 By Type
5.1.1 Pure Acrylic Emulsion
5.1.2 Styrene-Acrylic Emulsion
5.1.3 Vinyl-Acrylic Emulsion
5.2 By Application
5.2.1 Paints and Coatings
5.2.2 Construction Material Additives
5.2.3 Paper Coating
5.2.4 Adhesives
5.2.5 Other Applications (Textile and Non-woven Finishes, etc.)
5.3 By Geography
5.3.1 Asia-Pacific
5.3.1.1 China
5.3.1.2 Japan
5.3.1.3 India
5.3.1.4 South Korea
5.3.1.5 ASEAN Countries
5.3.1.6 Rest of Asia-Pacific
5.3.2 North America
5.3.2.1 United States
5.3.2.2 Canada
5.3.2.3 Mexico
5.3.3 Europe
5.3.3.1 Germany
5.3.3.2 United Kingdom
5.3.3.3 France
5.3.3.4 Italy
5.3.3.5 Spain
5.3.3.6 Russia

SCOTTS INTERNATIONAL

Acrylic Emulsions - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 120 pages | Mordor Intelligence

To place an Order with Scotts International:
- - Print this form
- - Complete the relevant blank fields and sign
- - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	$4750.00
	Team License (1-7 Users)	$5250.00
	Site License	$6500.00
	Corporate License	$8750.00
	VAT	
	Total	

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-03-02
		Signature	

Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com