Automotive Coatings - 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:

Automotive Coatings Market Analysis

The Automotive Coatings Market size is estimated at USD 29.60 Billion in 2025, and is expected to reach USD 37.67 Billion by 2030, at a CAGR of 4.94% during the forecast period (2025-2030). The rebound in global vehicle production, the pivot toward low-Volatile Organic Compound (VOC) formulations, and surging electric-vehicle (EV) output underpin demand expansion, even as raw-material price swings and tightening solvent regulations constrain margins. Suppliers are accelerating launches of water-borne and powder systems that comply with imminent emissions caps while still delivering Original Equipment Manufacturer (OEM)-level durability. OEM paint-shop digitalization spanning inline curing, robotic inspection, and cloud-based color matching is raising throughput and widening technical barriers to entry. Meanwhile, fragmentation persists as regional midsized suppliers vie for share against multinationals that can fund large-scale sustainability and automation programs.

Global Automotive Coatings Market Trends and Insights

Growing Global Vehicle Production Rebound

North American light-vehicle output reached 15.5 Million units in 2024 and continues rising, sustaining factory demand for exterior and under-body coatings. Light trucks now represent 84% of monthly sales, propelling the consumption of premium, scratch-resistant clear coats. In China, capacity additions and export momentum reinforce steady coating volumes, even as localized overcapacity looms. Automakers worldwide reinstate predictable sourcing schedules after pandemic disruptions,

enabling suppliers to optimize batch production and logistics. Parallel investments in advanced paint-shop automation and differentiated finishes surfaced as OEMs seek brand-distinctive aesthetics while meeting durability standards .

Shift Toward Water-borne & Powder Systems to Meet VOC Caps

The 2025 enforcement of stricter VOC ceilings in California and forthcoming EU Green Deal measures are accelerating reformulation of solvent-borne systems. Leading body shops already report 64% penetration of water-borne basecoats, validating commercial viability. BASF's Glasurit 100 Line exemplifies high-efficiency, low-VOC products now used by more than 1,000 collision centers. Powder coatings are gaining share in wheels, under-hood parts, and EV battery casings, helped by laser-curing ovens that cut energy use by 50%. Suppliers with broad resin and pigment portfolios are fastest to convert customers, establishing early-mover advantages before regulations tighten further.

Stringent Solvent & Isocyanate Exposure Limits

Occupational Safety and Health Administration (OSHA)'s National Emphasis Program intensifies inspections of paint booths, mandating enhanced ventilation and personal protective equipment to mitigate asthma and dermatitis risks from isocyanates . Small refinishing operations face steep capital costs for compliant spray booths or must migrate to low-isocyanate chemistries that may sacrifice performance. Primer and clear-coat formulators commercialize polyurea-free variants, although adoption remains cautious while durability benchmarks are validated.

Other drivers and restraints analyzed in the detailed report include:

Rising EV?specific Coating Demand for Battery Thermal Management / Recovery of Collision-repair Volumes in Mature Markets / Volatile Petrochemical-based Raw-material Pricing /

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

Segment Analysis

In 2024, acrylics supplied 48.55% of the Automotive Coatings market demand, cementing their status owing to cost-efficiency and balanced weatherability. Polyurethane formulations, advancing at a 5.18% CAGR to 2030, fulfill premium clear-coat and flexible-substrate needs, especially on luxury Sports Utility Vehicles (SUVs) and EVs requiring superior scratch resistance. The automotive coatings market size for polyurethane systems is expected to widen notably in North American OEM lines as new aliphatic diisocyanate chemistries meet stricter yellowing tests. Epoxy resins continue niche dominance in cathodic e-coats where corrosion protection is critical, while bio-based hybrids are emerging in concept programs led by European OEMs.

The polyurethane push is amplified by longer ownership cycles driving demand for durability, though OSHA scrutiny around isocyanate handling is prompting investment in closed-mixing cells and robot-spray enclosures. Suppliers such as Covestro now offer 33% renewable-carbon polyurethanes, illustrating alignment with OEM sustainability targets. Acrylic chemists are responding with next-generation crosslinkers that improve mar resistance without raising VOC levels. Competitive advantage increasingly hinges on patent portfolios that combine mechanical robustness with low-temperature cure profiles, addressing both energy-use mandates and lightweight-substrate requirements.

Solvent-borne finishes still held 70.85% revenue in 2024, propelled by superior flow and color depth demanded on metallic and pearlescent shades. Yet the automotive coatings market is unmistakably tilting toward alternatives as global VOC ceilings narrow. Water-borne systems now dominate EU OEM base-coat lines, with Japanese OEMs such as Mazda achieving industry-low emissions of 15 g VOC/m?. Powder coatings, while presently a minority, post the highest compound growth as energy-efficient laser-cure

tunnels become standard on EV component lines.

The automotive coatings market share for water-borne refinish lines has surpassed 60% in regulated regions as body shops align with environmental permits. Technological breakthroughs in resin emulsification and flash-off control have closed the performance gap with solvent-borne primers. Tier-one suppliers leverage modular resin architectures, enabling fast reformulation when each new rule tightens permissible VOCs or HAPS (hazardous air pollutants), insulating customers from mid-cycle compliance surprises.

The Automotive Coatings Market Report is Segmented by Resin Type (Polyurethane, Epoxy, Acrylic, and Others), Technology (Solvent-Borne, Water-Borne, and Powder), Coating Layer (E-Coat, Primer, Base Coat, and Clear Coat), Application (OEM and Refinish), 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 accounted for 58.82% of global 2024 revenue, buoyed by China's ascent as a net exporter and leadership in EV output. Capacity additions such as Indonesia's million-ton paint plant and Vietnam's fast-growing supplier parks underpin a 6.32% regional CAGR forecast. Local OEMs collaborate with multinational formulators to localize water-borne resins while preserving appearance parity with solvent benchmarks. Government stimulus on new-energy vehicles further amplifies demand for battery-specific functional coatings.

North America, with light-vehicle builds rising 9.6% in 2024, exhibits that constrained capacity plants regularly exceed rated throughput, creating favorable pricing for coatings. Stringent United States Department of Agriculture (USDA) BioPreferred and upcoming Environmental Protection Agency (EPA) per- and polyfluoroalkyl substances (PFAS) rules spur rapid qualification of fluorine-free top coats, compelling suppliers to accelerate R&D. The automotive coatings market share of low-VOC systems is poised to expand as Canadian and Mexican operations align with United States regulations.

Europe's focus on carbon neutrality pushes OEMs toward 100% renewable-electric paint shops and solvent-capture incinerators. Anti-dumping duties on titanium dioxide elevate cost structures, but wide adoption of dry-scrubber booths and closed-loop sludge recycling partially offsets outlays. Eastern European cluster growth, including Poland and Hungary offers lower-wage assembly yet requires suppliers to establish just-in-sequence hubs for tier-one paint modules.

South America benefits from Mercosur tariff reductions that encourage automakers to allocate new SUV platforms to Brazil and Argentina, lifting OEM-paint consumption. Nonetheless, currency volatility prompts formulators to adopt US-dollar-pegged contracts. Middle East & Africa remains nascent but shows promise as Saudi Arabia's Vision 2030 sparks domestic vehicle production and related coating capacity build-outs targeting export markets.

List of Companies Covered in this Report:

Akzo Nobel N.V. / Asian Paints PPG Pvt., Ltd. / Axalta Coating Systems, LLC / BASF / Beckers Group / Cabot Corporation / Eastman Chemical Company / Hempel A/S / HMG Paints Limited / Jotun / Kansai Nerolac Paints Limited / KCC Corporation / Nippon Paint Holdings Co., Ltd. / Parker Hannifin Corp / PPG Industries Inc. / RPM International Inc. / Shanghai Kinlita Chemical Co., Ltd. / The Sherwin-Williams Company /

Additional Benefits:

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

Table of Contents:

5.5 By Geography
5.5.1 Asia-Pacific
5.5.1.1 China
5.5.1.2 India
5.5.1.3 Japan
5.5.1.4 South Korea
5.5.1.5 Australia and New Zealand
5.5.1.6 Indonesia
5.5.1.7 Malaysia
5.5.1.8 Thailand
5.5.1.9 Rest of ASEAN
5.5.1.10 Rest of Asia-Pacific
5.5.2 North America
5.5.2.1 United States
5.5.2.2 Canada
5.5.2.3 Mexico
5.5.3 Europe
5.5.3.1 Germany
5.5.3.2 France
5.5.3.3 United Kingdom
5.5.3.4 Italy
5.5.3.5 Spain
5.5.3.6 Russia
5.5.3.7 Rest of Europe
5.5.4 South America
5.5.4.1 Brazil
5.5.4.2 Argentina
5.5.4.3 Rest of South America
5.5.5 Middle East and Africa
5.5.5.1 Saudi Arabia
5.5.5.2 South Africa
5.5.5.3 Egypt
5.5.5.4 Rest of Middle East and Africa

6 Competitive Landscape
6.1 Market Concentration
6.2 Strategic Moves
6.3 Market Share Analysis
6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products & Services, and Recent Developments)
6.4.1 Akzo Nobel N.V.
6.4.2 Asian Paints PPG Pvt., Ltd.
6.4.3 Axalta Coating Systems, LLC
6.4.4 BASF
6.4.5 Beckers Group
6.4.6 Cabot Corporation
6.4.7 Eastman Chemical Company

Automotive Coatings - 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	2026-02-26
		Signature