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Water-based Alkyd Coatings - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-08-01 | 120 pages | Mordor Intelligence

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Report description:

Water-based Alkyd Coatings Market Analysis

The Water-based Alkyd Coatings Market size is estimated at USD 3.86 billion in 2025, and is expected to reach USD 4.96 billion by 2030, at a CAGR of 5.14% during the forecast period (2025-2030). Stronger environmental compliance rules, a recovering construction sector, and steady product innovation underpin this growth. Manufacturers focus on low-VOC formulations and cobalt-free drying systems to satisfy tightening global regulations. Asia-Pacific dominates consumption, helped by accelerated industrialization and government crackdowns on solvent emissions. Architectural repaint cycles in North America and Europe sustain baseline demand, while fast-growth niches such as automotive refinish benefit from shorter process times and lower energy costs. Strategic consolidation and vertical integration give leading brands pricing power, yet bio-based emulsions open doors for differentiated challengers.

Global Water-based Alkyd Coatings Market Trends and Insights

Shift from Solvent- to Water-based Technology

Global mandates catalyze the conversion from solvent systems to water-based alkyds. Shanghai's 2018 ban on solvent architectural paints triggered nationwide adoption across Chinese construction, altering raw-material flows and influencing regional supply chains. The U.S. EPA's 2025 update of aerosol-coating VOC rules further boosts demand for less reactive ingredients. Suppliers such as Perstorp showcase next-generation emulsifiers that allow near-zero VOC performance without sacrificing hardness or gloss. Firms able to balance compliance with legacy performance secure early mover premiums and strengthen customer loyalty.

Construction Sector Recovery and Repaint Cycles

Residential repainting remains resilient as aging housing stock and DIY affordability offset slower new builds. Sherwin-Williams reports that its pro-contractor channel already captures 63% of U.S. paint volumes, reinforcing the value of professional networks. Asian Paints more than doubled decorative capacity with a USD 4.8 billion program to serve India's Housing for All initiative. These patterns illustrate that even modest GDP growth can unlock steady volume through repaint demand, cushioning cyclicality.

Longer Drying/Curing Time vs. Solvent Systems

Water slows evaporation under high humidity, lengthening project schedules and raising labor costs. Fast-dry DTM alkyd emulsions from Polynt shorten cycles yet still depend on optimized drier blends. Formulators wrestle with cobalt-replacement to mitigate toxicity while preserving siccative action. Performance gaps narrow each year, but contractors in equatorial climates often default to solvent formulations for exterior work.

Other drivers and restraints analyzed in the detailed report include:

Tightening Global VOC and HAP Regulations / Preference for Low-odor Indoor Paints / Humidity-Driven Weatherability Limitations /

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

Segment Analysis

Architectural coatings generated 46.51% of the water-based alkyd coatings market size in 2024, reflecting sustained repaint cycles and regulation-driven demand in residential interiors. Formulators deliver low-odor paints suited to occupied spaces and VOC limits as low as 50 g/L. Asian capacity expansion, led by Asian Paints and regional peers, keeps pace with urban housing programs. Longevity improvements such as non-yellowing finishes strengthen value propositions versus vinyl acrylics.

The automotive refinish segment will post the fastest 6.56% CAGR through 2030. AkzoNobel's Sikkens Autowave Optima cuts booth energy 60% and reduces layers to 1.5, enhancing shop throughput and lowering carbon intensity. Industrial metal, wood, and marine niches adopt water-borne alkyds as emulsification technologies hit ISO 12944 corrosion benchmarks. Furniture makers welcome bio-based variants that align with corporate sustainability goals, while machinery and offshore coatings represent specialized opportunities requiring advanced barrier additives.

The Water-Based Alkyd Coatings Report is Segmented by Application (Architectural, Protective/Industrial Metal, Wood Finishes, and More), End-User Industry (Construction and Infrastructure, Industrial OEM, Automotive and Transportation, Marine and Offshore, 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 commanded 41.32% of global revenue in 2024 and is set to advance at a 5.68% CAGR through 2030. China's solvent bans in cities such as Shanghai prompt wholesale migration to compliant water-based alkyds. National standards capping lead at 90 mg/kg further reinforce the shift, giving domestic producers technical mandates and export leverage. Robust construction, expanding automotive fleets, and rising consumer awareness anchor multi-segment demand.

North America maintains a strong position built on established distribution and stringent environmental codes. California's 50 g/L limit catalyzes research and development, while professional repaint services drive volume. U.S. producers leverage controlled channels and private-label contracts to optimize margins. Rapid adoption in automotive refinish accelerates as bodyshops realize cycle-time reduction.

Europe remains innovation-centric with early commercialization of bio-based emulsions and cobalt-free dryers. Mature consumption moderates volume growth, yet retrofitting of historical buildings and energy-efficient refurbishments sustain steady demand. EU Green Deal incentives encourage public-sector procurement of low-VOC coatings, giving compliant suppliers favored-bidder status.

South America witnesses incremental uptake as urban infrastructure expands, especially in Brazil's pre-World Cup facility renewals. Regulatory enforcement varies by country, but rising health awareness nudges buyers toward water-borne systems. Middle-East and Africa present early-stage opportunities centered on high-end commercial and oil-gas infrastructure needing corrosion-resistant yet compliant solutions. Price sensitivity and climate extremes temper speed of conversion, underlining the need for humidity-optimized formulations and local blending.

List of Companies Covered in this Report:

Akzo Nobel N.V. / Axalta Coating Systems, LLC / Benjamin Moore & Co. / Brillux GmbH & Co. KG / Caparol Paints / Cloverdale Paint Inc. / Hempel A/S / Jotun / Kansai Paint Co.,Ltd. / NATIONAL PAINTS FACTORIES CO. LTD. / NIPSEA Group / PPG Industries Inc. / RPM International Inc. / The Sherwin-Williams Company / Tikkurila /

Additional Benefits:

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

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