

Architectural Coatings - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Architectural Coatings Market Analysis

Architectural Coatings market size in 2026 is estimated at USD 95.57 billion, growing from 2025 value of USD 91.62 billion with 2031 projections showing USD 117.98 billion, growing at 4.3% CAGR over 2026-2031. Regulatory mandates for low-VOC formulations, rapid water-borne technology adoption, and renovation-led demand in mature housing stocks underpin this steady trajectory. Mandatory cool-roof codes in U.S. hot-climate states are accelerating reflective coating uptake, while China's Tier-2 and Tier-3 cities are fast-tracking water-borne conversions that shift global product mix toward sustainable chemistries. At the same time, labor shortages and epoxy-raw-material volatility are tightening margins, fostering investment in labor-saving application tools and smart-coating technologies.

Global Architectural Coatings Market Trends and Insights

Surging Renovation Demand in Aging U.S. Housing Stock

Homeowners are choosing upgrades over relocation as high mortgage rates persist, lifting volumes of premium exterior paints with cool-roof properties mandated by California Title 24. Compliance drives predictable demand because coatings are embedded in building-permit workflows rather than discretionary cycles. Los Angeles' Green Building Code stipulates Solar Reflectance Index thresholds, while local utilities pay USD 0.20 per ft² rebates that widen project budgets for higher-value formulations. Aging-in-place preferences extend repaint cycles, increasing willingness to invest in long-life systems that curb long-term

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maintenance. Manufacturers benefit as renovation spending is less volatile than new-build activity, allowing steadier production planning. Specialty suppliers leverage the shift by bundling color-visualization apps and contractor-matching services that streamline consumer decisions.

Mandatory Cool-Roof Codes in Hot-Climate U.S. States

California and the International Energy Conservation Code now require aged solar-reflectance levels more than or equal to 0.55 and thermal-emittance more than or equal to 0.75 for low-slope roofs in zones 1-3, compelling builders to select CRRC-listed products. Certification narrows the competitive field and pushes formulation research and development toward high-reflectance pigments and durable elastomeric binders. Compliance linkage to permitting enables suppliers to forecast volume more accurately and negotiate longer-term raw-material contracts. Exception pathways for air-gap roof assemblies influence architectural design and may spur hybrid systems combining coatings with vented substrates. States such as Texas and Arizona are amending codes, escalating nationwide adoption momentum.

Stricter EU Biocide Rules Limiting In-Can Preservatives

Regulations enacted in 2023 cap diisocyanate content and restrict PFAS, forcing European producers to redesign hardeners and stain-repellent chemistries. Reformulation costs rise as suppliers search for drop-in alternatives with equivalent shelf stability. Creosote bans in agriculture further squeeze wood-preservative ranges, raising technical hurdles for pan-European lines. The ripple extends globally as multinationals harmonize specifications, increasing compliance investments and elongating product-development cycles.

Other drivers and restraints analyzed in the detailed report include:

Rapid Shift to Water-Borne Technologies in China's Tier-2 and Tier-3 Cities
Smart-Pigmented Self-Cleaning Facade Coatings
Skilled-Painter Shortages in North America

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

Segment Analysis

Water-borne systems generated 52.02% of the architectural coatings market share in 2025 and are growing at a 4.70% CAGR as regulators curb VOC emissions and municipalities from Shanghai to Shenzhen outlaw solvent-rich products. These advances, combined with demonstrated VOC reductions of more than 50% versus solvent lines, cement water-borne leadership. Solvent-borne coatings persist in niche uses requiring penetration or extreme moisture tolerance, whereas powder and radiation-curable technologies make incremental gains in factory-applied finishes. Adoption momentum positions water-borne as the technology backbone of the architectural coatings market, with suppliers scaling capacity and localized tinting infrastructure to meet code-driven demand surges.

Continued legislative tightening in the EU and North America will accelerate the technology's penetration into mid-tier and entry-level price points, narrowing historical cost gaps with solvent alternatives. OEM and contract applicators increasingly specify water-borne lines to align with ESG reporting and to mitigate future compliance liabilities. Consequently, tier-one producers channel capital toward water-borne resin reactors, while second-tier firms explore licensing or joint ventures to access proprietary polymer platforms. As economies of scale lower per-liter costs, water-borne adoption becomes self-reinforcing, underpinning its central role in overall architectural coatings market growth.

The Architectural Coatings Report is Segmented by Technology (Water-Borne, Solvent-Borne, Others), Resin Type (Acrylic, Alkyd,

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Epoxy, Polyester, Polyurethane, and Other Resin Types), End-Use (Residential and Commercial), 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 generated 46.10% of worldwide architectural coatings revenue in 2025 and is climbing at a 5.52% CAGR, powered by urbanization, smart-city investments, and rapid residential construction. China's enforcement of water-borne mandates is propelling large-scale technology switching, while ASEAN nations leverage DIFM service models and rising disposable incomes to adopt higher-quality finishes.

North America delivers steady growth through renovation cycles and regulatory-driven cool-roof demand. California Title 24 and IECC provisions convert code compliance into steady volumes of high-reflectance coatings, even as overall housing starts moderate. However, skilled-painter shortages and escalating labor rates temper near-term expansion, prompting uptake of labor-saving spray rigs and quick-set formulations to sustain application capacity

Europe's mature market navigates a complex regulatory environment that tightens VOC, biocide, and PFAS thresholds. Reformulation costs challenge profitability, yet the region's commitment to sustainability and circular-economy principles favors premium, low-VOC water-borne solutions. Eastern European infrastructure projects and renovation subsidies offer pockets of above-average growth, while Western Europe focuses on high-performance envelope upgrades to meet carbon-reduction targets. Latin America, the Middle East, and Africa remain smaller segments but present upside tied to economic diversification and large-scale housing initiatives, attracting strategic acquisitions such as Saint-Gobain's purchase of Mexico's Ovniver Group .

List of Companies Covered in this Report:

3 TREES Group AkzoNobel N.V. Asian Paints BASF Beckers Group Benjamin Moore and Company Berger Paints India Ltd. Brillux GmbH and Co. KG CIN S.A. DAW SE Flugger group AS Hempel A/S Jotun Kansai Paint Co., Ltd. Masco Corporation Nippon Paint Holdings Co., Ltd PPG Industries Inc. RPM International Inc. Sniezka SA The Sherwin-Williams Company

Additional Benefits:

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

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6.4.18 RPM International Inc.

6.4.19 Sniezka SA

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