

# South America Construction Chemicals - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2030)

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## Abstracts

The South America Construction Chemicals Market size is estimated at 4.68 billion USD in 2024, and is expected to reach 6.53 billion USD by 2030, growing at a CAGR of 5.73% during the forecast period (2024-2030).

Procrear 2023 and Minha Casa, Minha Vida housing schemes' influence over South America's construction chemicals demand

The demand for construction chemicals in South America witnessed a 5.89% increase in 2022, primarily attributed to a surge in construction activities. Notably, Brazil saw a 4.1% rise in new residential floor areas in 2022 compared to the preceding year. With the commercial and infrastructure sectors leading the way, the construction chemicals market in South America was projected to grow by 5.55% in 2023, in terms of value, when compared to 2022.

Argentina and Brazil dominate the consumption of construction chemicals in South America. Notably, the residential sector in both countries commands the highest demand, accounting for 30% and 43% of the total demand, respectively, across all end-user sectors in 2022.

Across most South American countries, the Industrial and Institutional sectors are the primary consumers of construction chemicals. However, in Brazil, the residential sector takes the second spot, making it the region's second-largest end-user sector. Excluding Brazil and Argentina, the Industrial and Institutional sector held a 45% share of the

overall demand in 2022 across the other countries in the region.

Projections indicate that Brazil and Argentina will witness the swiftest surge in construction chemical demand, primarily driven by their residential sectors. National housing initiatives, such as Argentina's Procrear 2023 and Brazil's Minha Casa, Minha Vida, are set to spur the construction of new homes and the renovation of existing ones. Consequently, the residential sector is poised to witness the fastest growth in demand, with a projected CAGR of 6.36% during the forecast period (2023-2030).

The growing dominance of Brazil in South American construction chemicals market

In 2022, the residential sector emerged as the leading consumer of construction chemicals in South America, accounting for approximately 35% of the total demand across all sectors. Brazil, with its sizable residential sector, spearheaded this demand. Looking ahead to 2023, the commercial and infrastructure sectors are poised to witness the most significant surge in demand in the region.

Brazil, as the region's largest economy and most populous nation, naturally takes the lead in construction output. Consequently, it also boasts the highest consumption of construction chemicals. Notably, Brazil's residential sector commands the lion's share, representing about 43% of the nation's total consumption in 2022.

Following Brazil, Argentina stands out as the second-largest consumer of construction chemicals. Argentina alone accounted for a massive demand worth USD 378.5 million in 2022. This demand is primarily driven by the country's residential and industrial/institutional sectors, which accounted for over USD 223.3 million in 2022.

With Brazil's residential and industrial/institutional sectors projected to witness a significant increase in new floor areas by 2030 (37% and 30%, respectively, compared to 2022), the demand for construction chemicals is expected to surge. As a result, Brazil is anticipated to lead the expansion of the construction chemicals market in South America, with a forecasted CAGR of 6.11% from 2023 to 2030.

South America Construction Chemicals Market Trends

Growing foreign direct investments (FDIs) in the region to aid the market demand in the coming years

In 2022, the commercial sector in South America saw a significant decline of 16.2% in new floor area construction, largely driven by a 9.16% drop in Argentina. However, the sector was poised for a rebound in 2023, with a projected 4.75% increase in volume output. This growth can be attributed to economic growth and a surge in commercial construction, as various industries in the region attracted foreign direct investments (FDI) in 2022. In 2022, the Economic Commission for Latin America and the Caribbean (ECLAC) reported a robust 55.2% rise in FDI in the region.

The construction volume in the sector witnessed a notable growth of 15.9% in 2020 and a further 3.29% in 2021. This growth was a result of South American governments prioritizing the infrastructure and construction sectors. They eased restrictions, allowing construction, maintenance, and project development activities in private and public ventures. This move aimed to meet crucial milestones, deadlines, and economic recovery goals.

The commercial sector in South America is projected to witness robust growth in new floor area construction, registering a CAGR of 4% in volume during the forecast period (2023 to 2030). The region is witnessing a notable shift in its commercial construction landscape. Notable projects like the Paulinia Data Center and Porto Alegre Data Center I, initiated in 2023, are among the largest in the region. Additionally, investors are eyeing office buildings, shopping centers, and logistic parks in Brazil, which are expected to fuel market demand in the coming years.

Affordable housing schemes and subsidies in South America to influence higher construction in the residential sector

In 2022, the residential sector in South America witnessed a 3.35% surge in new floor area construction compared to the previous year. However, Argentina saw a notable decline of 9.16% in this metric. In 2023, the sector was projected to maintain its growth trajectory, with a construction volume expected to be 3.3% higher than in 2022. This growth can be attributed to factors like increasing urbanization, rising per capita income, and overall economic expansion, all of which are fueling the demand for housing.

Amidst the backdrop of the COVID-19 pandemic in 2020, South America saw a significant uptick of 11.83% in new floor area construction compared to the previous year. This was a deliberate move by the South American government, which prioritized

the construction sector to mitigate the economic downturn and support workers, given the sharp decline in household incomes. Consequently, restrictions on construction activities, including quarantines, were eased.

Several South American nations are rolling out initiatives to make housing more affordable for their growing populations. For example, in February 2023, Brazil relaunched its nationwide federal housing program, targeting low-income individuals. In October 2023, the World Bank approved a USD 100 million financing package for Ecuador, specifically aimed at bolstering affordable and resilient housing. Bolivia's efforts to ramp up the supply of low-cost housing and maintain reasonable prices are poised to further stoke the demand for residential spaces. As a result, the residential sector in South America is projected to witness a CAGR volume of 4.09% during the forecast period (2023-2030).

### South America Construction Chemicals Industry Overview

The South America Construction Chemicals Market is fragmented, with the top five companies occupying 26.38%. The major players in this market are Arkema, MBCC Group, RPM International Inc., Saint-Gobain and Sika AG (sorted alphabetically).

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