

South Africa Construction Chemicals Market By Product Type (Concrete Admixtures, Waterproof Chemicals, Construction Adhesives & Sealants, Protective Coatings, Others), By Application (Residential, Industrial/Commercial, Infrastructure, Repair Structures), By Region, Competition, Forecast and Opportunities, 2028F

Market Report (3 business days) | 2023-09-05 | 92 pages | TechSci Research

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Report description:

The South Africa Construction Chemicals Market was valued at USD 937.41 million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 3.56% through 2028. South Africa Construction Chemicals Market is anticipated to grow significantly rate in the projected period of 2028, which is driven by the increasing demand from the end-user sector. In 2022, the South African construction sector contributed approximately USD 5.9 billion to the country's gross domestic product (GDP). South Africa's Construction Chemicals Market is expected to expand during the projected period due to increasing demand from the end-user industry, as construction chemicals play a crucial role in enhancing the durability, strength, and performance of construction materials.

Key Market Drivers

Rising Urbanization Trend

Urbanization is a global phenomenon that has a profound impact on the construction industry, and South Africa is no exception. As urban areas continue to expand and evolve, the demand for construction chemicals has seen a significant surge. Urbanization brings about a pressing need for infrastructure development in South Africa's growing cities. As more people move to urban areas, there is a demand for housing, transportation networks, utilities, commercial buildings, and public amenities. Construction chemicals play a crucial role in enhancing the quality and durability of infrastructure projects. Waterproofing solutions, concrete additives, adhesives, sealants, and protective coatings are vital in ensuring the longevity and performance of structures. The demand for construction chemicals to support urban infrastructure development has witnessed a steady rise in South Africa. In addition, as cities become more densely populated, there is an increased focus on vertical growth, leading to the construction of high-rise buildings and skyscrapers. These structures require specialized construction chemicals to address unique challenges

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such as structural integrity, fire resistance, and acoustics. Construction chemicals like concrete admixtures, fireproofing coatings, and soundproofing materials are in high demand for the construction of tall buildings. The rise of high-rise constructions in urban areas has fueled the need for innovative construction chemicals that can meet the specific requirements of these projects. In addition, Urbanization often leads to the rehabilitation and renovation of existing infrastructure and buildings to meet the evolving needs of urban dwellers. As older structures are revitalized, construction chemicals play a vital role in the repair, restoration, and protection of these assets. Repair mortars, waterproofing systems, protective coatings, and sealants are essential for maintaining and improving the condition of aging infrastructure. The demand for construction chemicals for rehabilitation and renovation projects has increased as urban areas strive to preserve and repurpose existing structures. For instance, in 2019, Sika renovated Zeitz Museum located at the famous V&A Waterfront in Cape Town, South Africa, by using Sikagard-706 W Thixo that was applied to the old concrete of the silos as a protective coating and water-repellent impregnation.

Growing Demand from Various Industries

South Africa's diverse industries, ranging from manufacturing to mining, rely heavily on robust infrastructure and specialized facilities to drive economic growth. Construction chemicals play a vital role in meeting the unique requirements of these industries, ensuring the durability, safety, and efficiency of their infrastructure. The manufacturing sector in South Africa encompasses a wide range of industries, including automotive, food and beverage, pharmaceuticals, and textiles. These industries require specialized manufacturing facilities that adhere to strict quality and safety standards. Construction chemicals such as industrial flooring systems, epoxy coatings, and chemical-resistant linings are crucial for maintaining hygienic conditions, providing chemical protection, and ensuring smooth operations. As the manufacturing sector continues to grow, the demand for construction chemicals tailored to their specific needs increases. Along with this, South Africa's rich mineral resources have made mining and extraction a significant contributor to the country's economy. The mining industry requires robust infrastructure, including processing plants, storage facilities, and transport networks. Construction chemicals play a crucial role in the mining sector, offering solutions for waterproofing, corrosion protection, and ground stabilization. Additionally, mining operations often involve the construction of tailings dams, where construction chemicals such as geomembranes and erosion control products are essential. The mining industry's demand for construction chemicals is driven by the need for long-lasting and environmentally sound solutions. Moreover, the energy and utilities sector in South Africa encompasses power generation, oil and gas, water treatment, and renewable energy industries. These industries require durable infrastructure and specialized facilities to ensure the efficient and safe production, storage, and distribution of energy and resources. Construction chemicals play a significant role in these sectors, providing insulation materials, protective coatings for pipelines and tanks, and concrete repair solutions. As South Africa continues to invest in renewable energy and upgrade its utilities infrastructure, the demand for construction chemicals in these sectors is poised to grow. For instance, Mapei South Africa Pty (Ltd) offered EPORIP & EPOJET LV epoxy resin for repairing concrete and sealing joints in the Banja Hydropower Plant. Hence, the increased use of construction chemicals in various industries is fueling the South Africa Construction Chemicals Market growth in the projected period.

Key Market Challenges

Fluctuation in Prices of Raw Material

Currency fluctuations may have a significant impact on the cost of importing raw materials, particularly when these materials are sourced from international markets. The variability in the exchange rate between the South African Rand and other currencies can result in unforeseen changes in procurement costs. The construction chemicals industry often relies on commodities such as oil, polymers, and metals. Speculative activities in commodity markets, influenced by factors like geopolitical tensions or speculative trading, can result in sudden and unpredictable price changes. The transportation and handling expenses of raw materials can have a substantial impact on their ultimate pricing. Variations in fuel prices, shipping rates, and transportation infrastructure can result in alterations to the overall cost structure.

Shortage of Skilled Labor

The scarcity of skilled labor in the construction chemicals market of South Africa poses a multifaceted challenge influenced by various interconnected factors. The evolving nature of the construction chemicals industry demands a specialized skill set, including expertise in chemical formulations, application techniques, and safety protocols. The availability of comprehensive educational and training programs tailored to the specific needs of the construction chemicals sector is currently limited. Consequently, there is a scarcity of opportunities for individuals to acquire the requisite knowledge and skills to excel in this field.

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Key Market Trends

Advancements in Waterproofing Solutions

The construction chemicals market in South Africa is undergoing a transformative evolution driven by a pressing need for innovative and reliable waterproofing solutions. Waterproofing solutions are crucial in protecting structures from water ingress, moisture damage, and the deterioration of building materials. With the increasing complexity of infrastructure projects, there is a growing demand for advanced waterproofing technologies, resulting in significant transformative trends. Self-adhesive membranes, liquid-applied membranes, and pre-applied membranes provide seamless and durable waterproofing barriers that adapt to various construction requirements. Nanotechnology has brought about a groundbreaking transformation in the construction chemicals market through the introduction of nano-scale additives and coatings. These remarkable nanoparticles enhance the water-repellent characteristics of materials, creating a hydrophobic barrier that effectively safeguards against water infiltration while preserving the breathability of the building envelope.

Regulatory Compliance and Quality Standards

The construction chemicals market in South Africa is experiencing a growing focus on health, safety, and environmental regulations. Government agencies are progressively implementing and enforcing standards to protect workers, communities, and ecosystems from the potential risks associated with construction chemicals. Adhering to these regulations not only prevents harm but also enhances the reputation of industry participants as responsible environmental stewards. Regulations and certifications, such as those set by the Green Building Council of South Africa (GBCSA), are driving the adoption of eco-friendly construction chemicals that minimize environmental impact and promote resource efficiency. Regulatory agencies are promoting the importance of transparent product labeling and providing comprehensive information about the chemical composition of construction products. This level of transparency empowers various stakeholders, including contractors, architects, and consumers, to make well-informed decisions based on the potential impact of construction chemicals on health, safety, and the environment. The construction chemicals market in South Africa is adopting globally recognized quality standards, exemplified by the International Organization for Standardization (ISO). Manufacturers are actively seeking ISO certification to showcase their dedication to delivering products that adhere to consistent and dependable quality benchmarks. Construction chemicals companies are placing greater importance on conducting supplier audits and ensuring traceability throughout the supply chain. By ensuring that raw materials and components meet stringent quality standards, manufacturers can uphold the integrity of their end products and mitigate the risk of defects or failures.

Segmental Insights

Product Type Insights

In 2022, the construction chemicals market was dominated by concrete admixtures and is predicted to continue expanding over the coming years. The demand for concrete admixtures in the country is increasing significantly as this chemical is a prerequisite for almost all construction activities. Furthermore, due to the growing number of infrastructural development projects, such as Nedbank & DBSA Green Housing, Balwin Properties, Transcend Project, and others, the infrastructure segment has become the dominant player in the construction chemicals market in South Africa. By altering the characteristics of hardened concrete, concrete admixtures lower the cost of building with concrete by assuring greater quality while being mixed, transported, placed, and cured. This enables users to handle crises when working with concrete. This trend is expected to continue in the coming years.

Application Insights

In 2022, the construction chemicals market was dominated by the commercial segment and is predicted to continue expanding over the coming years. This can be attributed to the expansion of the retail sector, and the establishment of contemporary shopping centers are notable characteristics of South Africa's commercial landscape. The construction and upkeep of these facilities necessitate a diverse array of construction chemicals, encompassing flooring solutions, sealants, adhesives, and waterproofing materials. Construction chemicals are essential for various applications in office buildings, from concrete repair and protection to interior finishing and aesthetics. Commercial real estate investments, encompassing office spaces, retail properties, and mixed-use developments, garner significant investments from both domestic and global investors. This influx of capital fuels construction and renovation projects that heavily rely on construction chemicals.

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Regional Insights

The Western Cape has established itself as the leader in the South Africa Construction Chemicals Market. As urbanization continues to shape the Western Cape, there is an increasing demand for residential and commercial real estate. Construction chemicals play a vital role in ensuring the quality and durability of buildings, which aligns with the region's urban development objectives. The Western Cape has been a focal point for infrastructure development projects, including transportation, commercial spaces, and public facilities. The construction chemicals market plays a vital role in supporting these projects by providing products that enhance the durability, performance, and sustainability of structures.

Key Market Players

- Sika South Africa Pvt. Ltd.
- BASF Construction Chemicals South Africa (Pty.) Ltd.
- StonCor Africa (Pty) Ltd.
- Technical Finishes SA (Pty) Ltd.
- a.b.e. Construction Chemicals (Pty) Ltd.
- AShakConstruction Chemicals Pty Ltd.
- Multi Construction Chemicals (Pty) Ltd.
- Verni Speciality Construction Products (Pty) Ltd.
- MAPEI South Africa (Pty) Ltd.
- Penetron Africa (Pty) Ltd.

Report Scope:

In this report, the South Africa Construction Chemicals Market has been segmented into the following categories, in addition to the industry trends, which have also been detailed below:

□□South Africa Construction Chemicals Market, By Product Type:

- o□Concrete Admixtures
- o□Waterproof Chemicals
- o□Construction Adhesives & Sealants
- o□Protective Coatings
- o□Others

□□South Africa Construction Chemicals Market, By Application:

- o□Residential
- o□Industrial/Commercial
- o□Infrastructure
- o□Repair Structures

□□South Africa Construction Chemicals Market, By Region:

- o□Gauteng
- o□Western Cape
- o□Northern Cape
- o□KwaZulu-Natal
- o□Eastern Cape
- o□Free State
- o□Northwest
- o□Mpumalanga
- o□Limpopo

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the South Africa Construction Chemicals Market.

Available Customizations:

South Africa Construction Chemicals Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

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Company Information

□ Detailed analysis and profiling of additional market players (up to five).

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