

South East Asia Geosynthetics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The South East Asia Geosynthetics Market size is estimated at USD 184.82 million in 2024, and is expected to reach USD 295.77 million by 2029, growing at a CAGR of 9.86% during the forecast period (2024-2029).

The market was negatively impacted by COVID-19 in 2020 as several industries, such as construction, manufacturing, and other industries, have been halted, and the shutdown of road and rail network projects also slowed down the growth of the geosynthetics market. Currently, the market has recovered from the pandemic and is growing at a significant rate.

Key Highlights

- The growing roadways and railways construction projects, and the growing concerns regarding environmental protection are major factors driving the growth of the market studied.
- However, installation damage threats are likely to restrain the growth of the studied market.
- Nevertheless, growing investment in the mining sector is likely to create lucrative growth opportunities for the Asia-Pacific market.
- Indonesia represents the largest market over the forecast period due to the consumption from various applications such as drainage, soil erosion control, liquid/gas storage, reinforcement, and others.

South East Asia Geosynthetics Market Trends

Construction Segment to Dominate the Market

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- In the construction segment, geosynthetics are highly used for the construction of roadways, railways, bridges, and other types of construction to stabilize the terrain.
- Geosynthetics are versatile materials that enhance the performance of roadways. They can be used for separation, filtration, reinforcement, stiffening, drainage, barrier, and protection.
- The first application of geosynthetics technology was to stabilize a highway built on swampy land leading to Soekarno Hatta airport in Indonesia. Geosynthetics are now widely used in civil engineering for challenging ground conditions, including road construction.
- The demand for geosynthetic materials is likely to increase, with several projects in the pipeline across the region. For instance, the Yogyakarta-Bawen Toll Road Project involves the construction of a 76.36 km toll road from Bawen to Yogyakarta in Indonesia, which commenced in Q2 2022 and is expected to finish in Q4 2024.
- According to the Singapore Department of Statistics, approximately 9.61 thousand lane-kilometers of roads were paved in 2022. A new road interchange to connect the Pan-Island Expressway (PIE) and the upcoming Tengah Town (by 2027) is also under construction in the country and is scheduled for completion in 2023.
- An eight-lane bridge is being built parallel to Rama IX Bridge over the Chao Phraya in Bangkok, Thailand, and is the country's widest river bridge. It will be a 2-kilometre-long cable-stayed structure, part of the Rama III-Dao Khanong-Western Ring Road expressway project, which is expected to be completed by 2024.
- In Malaysia, the construction of the nation's longest bridge, the Batang Lupar bridge, spanning over a river, is under construction and is scheduled for completion by 2025.
- In the Philippines, the Department of Transportation awarded ACCIONA with the South Commuter Railway Project Package 02 in February 2023, which involves the construction of 7.9 kilometers of rail tracks on a viaduct, as well as three stations (España, Santa Mesa, and Paco) in Manila.
- Therefore, such construction projects in pipelines in Southeast Asia countries are playing an instrumental role in driving the demand for the geosynthetics market.

Indonesia to Dominate the Regional Market

- Indonesia is expected to dominate the geosynthetics market during the forecast period due to the increasing construction projects such as roadways, railways, bridges, drainage, soil erosion control, and others.
- In Indonesia, a road development project through a biodiverse forest to build its 'green' capital city was under construction as of April 2023. A new toll road in Indonesia's East Kalimantan province is being built to improve access to the interior of Borneo, including to the nation's new capital city, Nusantara.
- Additionally, in Indonesia, soil erosion is a major threat to sustainability and productivity in agriculture, with knock-on effects on the climate crisis and food security.
- Reducing erosion risk is particularly important for Indonesia, where three of the world's 10 watersheds have the highest erosion risk. Sustainable land management can help solve a multitude of problems. Therefore, any initiative in this regard may serve as an opportunity for the geosynthetics market in the country.
- Geosynthetics is a revolutionary product group in civil engineering. They offer cost-effective, high-performance, and long-term solutions to problems in geotechnical, geo-environmental, hydraulic, and transportation engineering. Ultimately, they lead to more sustainable, economically constructed infrastructure with greater resilience compared to alternatives.
- Various infrastructure investments are being witnessed in the planning and construction stages in Indonesia, which is likely to have a positive influence on the demand for geosynthetics. For instance, the Indonesian President broke ground for the construction of several projects ranging from a toll road, airport, and hospital to a hotel in a planned new capital city, Nusantara, worth USD 32 billion.
- According to the Ministry of Finance Indonesia, the government of Indonesia has allocated around IDR 392 trillion (~USD 0.03

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trillion) for infrastructure construction as of 2023.

- Therefore, all such aforementioned trends in the country are anticipated to increase the demand for geosynthetics during the forecast period.

South East Asia Geosynthetics Industry Overview

The South East Asia Geosynthetics market is highly fragmented in nature. The major players (not in any particular order) include ACE Geosynthetics, HUESKER Synthetic GmbH, TenCate Geosynthetics Asia Sdn Bhd., United Geosynthetics, and WIL-KEY INTERNATIONAL SDN BHD, among others.

Additional Benefits:

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

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