

South America Adhesives And Sealants - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The South America Adhesives And Sealants Market size is estimated at USD 4.27 billion in 2025, and is expected to reach USD 5.45 billion by 2030, at a CAGR of greater than 5% during the forecast period (2025-2030).

The South American adhesives and sealants market was significantly affected by the COVID-19 pandemic, bringing both challenges and opportunities. Lockdowns and disruptions in industries like construction and manufacturing initially reduced demand. However, the pandemic simultaneously increased the need for adhesives and sealants in manufacturing medical supplies, personal protective equipment, and hygiene products. Despite the initial setbacks, the market is anticipated to recover and exhibit long-term growth.

The demand for adhesives and sealants is extensively driven by the growing demand from the construction industry and increasing healthcare infrastructure.

However, the market growth is likely to be hindered by the stringent VOC emissions regulations related to adhesives and sealants.

The innovation and development of bio-based adhesives and shifting focus toward adhesive bonding for composite materials are likely to offer opportunities for the adhesives and sealants market in the region.

Brazil stands to be the largest market for adhesives and sealants in the region, where the end-user industries, such as construction, aerospace, and automotive, majorly drive consumption.

South America Adhesives and Sealants Market Trends

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The Building and Construction Industry to Dominate the Market

- Adhesives and sealants have been extensively used in the building and construction industry owing to their characteristics and physical properties. These properties include good adhesion and elasticity, cohesion, high cohesive strength, flexibility, the high elastic modulus of the substrate, resistance from thermal expansion, and environmental resistance from UV light, corrosion, salt water, rain, and other weathering conditions.
- In 2022, the South American region will see a tremendous increase in construction activities. The reason for this is the rebounding from the impact of lockdowns and restrictions imposed by the government during the pandemic year.
- According to the Chilean Chamber of Construction (CChC), the Construction Materials and Supplies Price Index (IPMIC) rose by 5.9% YoY in the first three months of 2023.
- Brazil is the primary and most significant construction and real estate market in the region. However, the country's recession and weak economic conditions are expected to hamper the growth of the region's construction industry.
- In Brazil, the government launched an infrastructure concessions program with an aim to develop the country's port, road, railway, power transmission lines, and sanitation infrastructure. Under this plan, the government aims to invest BRL 45.0 billion (USD 14.1 billion) through the public-private partnership (PPP) model. Furthermore, government programs such as Minha Casa Minha Vida (MCMV), Plano Decenal de Expansão de Energia 2026, and the National Education Plan are expected to support industry growth over the forecast period.
- Furthermore, in 2022, there will be a tremendous rise in industrial construction in Brazil. BSBios, an agribusiness chain company, is planning to construct a wheat ethanol plant in Brazil. Nordic Impact Cooperation (NIC), a major investment company, has invested in the construction of six solar PV plants with a capacity of 18MW in Brazil.
- All of the above thin Brazil factors are likely to increase the demand for adhesives and sealants in the region during the forecast period.

Brazil to Dominate the Demand in South American Region

- Brazil is the country with the highest consumption of adhesives in South America. Packaging, automotive, construction, and other sectors rely heavily on adhesives.
- Brazil's growth is fueled mainly by rapid expansion in the residential and commercial building sectors and the country's expanding economy.
- According to the Brazilian government, USD 866 million was invested in 762 infrastructure projects in 2022 to upgrade the state of Brazilian tourist cities and maximize the potential of the industry, drawing more tourists and providing them with a more comfortable stay.
- Brazil's paper and pulp sector is one of the country's most successful agricultural exports, ranking high on the list of nations that generate this kind of product. Cartons can be made from various materials such as paperboard, duplex, white kraft, recycled materials, or composite. Combistyle carton packaging was introduced in May 2022 by SIG, along with Frimesa, one of the largest milk producers in Brazil. These carton packs were showcased at APAS Show 2022, the biggest F&B trade show in the Americas, held in So Paulo, Brazil.
- Brazil is one of South America's largest markets for corrugated cardboard. According to estimates from the Brazilian Institute of Geography and Statistics, Brazil's production of sheets and corrugated cardboard packaging is expected to rise from USD 2.89 billion in 2018 to USD 3.18 billion in 2023.
- The Brazil e-commerce market grew by 31% in the first half of 2021, and in 2020, it had already grown by 40%. In today's competitive FMCG market, it has become inevitable for companies to use attractive packaging and bring innovation to their packaging to stand out from their competitors and maintain their brand image in the market.

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- The automotive industry is another primary sector that uses adhesives and sealants extensively in the country. According to OICA, the total production of automotive, including passenger cars and commercial vehicles, in 2022 was 2.36 million units, registering a 5% growth in production compared to 2021. In 2021, the total automotive production was estimated to be around 2.24 million units.
- The country is a mature pharmaceutical market in the region. The market in the country witnessed various product innovations, especially pharmaceutical packaging products, owing to significant vendors across the country.
- Furthermore, according to the Brazilian Federation of Hospitals, National Health Confederation (Brazil), and Ministry of Health (Brazil), the number of hospitals in Brazil reached 7,191 in 2022. Such growth in hospitals would increase the opportunities for pharmaceutical packaging vendors nationwide to serve the growing need for prescribed pharmaceuticals.
- All the factors above have a significant impact on the demand for adhesives and sealants in the country.

South America Adhesives and Sealants Industry Overview

The South American adhesives and sealants market is fragmented in nature. The major players (not in any particular order) include Henkel AG & Co. KGaA, 3M, H.B. Fuller Company., Arkema and Sika AG.

Additional Benefits:

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

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