

## **Southeast Asia Construction Chemicals - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-06-01 | 120 pages | Mordor Intelligence

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### **Report description:**

Southeast Asia Construction Chemicals Market Analysis

The Southeast Asia construction chemicals market is valued at USD 3.20 billion in 2025 and is forecast to reach USD 4.22 billion by 2030, registering a 5.72% CAGR. A sizable public-sector infrastructure pipeline, rapid urbanization, and stricter performance standards are increasing demand for advanced admixtures, waterproofing agents, and protective coatings throughout the region. Elevated public spending on transport corridors, housing, and industrial estates is amplifying the volume of concrete placed each year, while swelling renovation needs for aging bridges, ports, and buildings expand opportunities for high-performance repair products. Parallel regulatory pressure, led by Singapore's 2025 restrictions on persistent chemicals, is accelerating the switch toward low-VOC and bio-based formulations. Intensifying consolidation among global suppliers, exemplified by Saint-Gobain's purchase of FOSROC, is raising the competitive bar on both innovation and service capability across the Southeast Asia construction chemicals market.

Southeast Asia Construction Chemicals Market Trends and Insights

Surging Public-sector Infrastructure Investments

Governments are boosting construction budgets to relieve capacity bottlenecks and spur economic growth. Indonesia has earmarked IDR 423.3 trillion for 2024 infrastructure work, while its USD 35 billion New Capital City is expected to consume 2 million tons of cement, stimulating demand for concrete admixtures and protective coatings. Vietnam began 13 transport projects

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worth USD 1.2 billion in 2024, raising requirements for corrosion-resistant coatings and high-early-strength grouts. Thailand's Eastern Economic Corridor megaprojects and the Philippines' drive to narrow a 10 million-unit housing backlog reinforce a steady call for waterproofing and sealants. Malaysia's 14.6% construction growth in H1 2024 further illustrates how fiscal outlays translate into higher consumption of admixture and repair compounds.

### Booming Prefabricated and Modular Building Adoption

Industrialized Building Systems shorten schedules and cut labor hours, reshaping chemical specifications. Gamuda IBS has erected 50-story towers in two-thirds of the traditional timelines in Malaysia, spurring the uptake of fast-setting grouts and connection adhesives. Indonesian precast concrete delivers 5-10% cost savings and enhanced seismic resilience, driving interest in flexible jointing compounds. Singapore's Housing Development Board has embedded polymer concrete in more than 700,000 units, guiding performance benchmarks across the Southeast Asia construction chemicals market. Vietnam's rising foreign investment inflows into manufacturing fuel modular construction that depends on specialty sealants for off-site assembly.

### Stringent VOC and Formaldehyde Emission Caps

The Environmental Protection and Management Act amendments in Singapore require handling licences for persistent organic pollutants, adding compliance costs for solvent-borne products. Vietnam's QCVN 01:2025/BYT regulation sets workplace limits on 70 substances, forcing reformulation of legacy adhesives. Thailand's broad environmental framework tightens factory emissions, with smaller suppliers struggling to finance R&D for greener recipes. Indonesian coatings makers project continued construction growth, yet warn that limited consumer acceptance of premium eco-products could restrain uptake.

Other drivers and restraints analyzed in the detailed report include:

Rising Demand for Water-based, Low-VOC Construction Solutions / Growing Renovation Requirements Due to Aging Infrastructure / Lack of Skilled Labour /

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

### Segment Analysis

Concrete admixtures held a 33.48% slice of the Southeast Asia construction chemicals market in 2024, cementing their role in large-scale transport and housing programs. Indonesia's cement dispatches of 64.887 million tons in 2024, paired with Vietnam's 20% consumption surge in Q1 2025, created fertile territory for water reducers and set-controllers that accelerate turnaround of cast-in-place structures. Protective coatings, the fastest-growing sub-segment at 6.75% CAGR, ride on rehabilitating bridges, wharves and pipelines that need high-build epoxies to resist chloride ingress. Adhesives and flame retardants cater to the expanding modular-building scene, while waterproofing membranes protect projects exposed to monsoon cycles and high groundwater tables.

Technological trajectories within the Southeast Asia construction chemicals market emphasize multi-functional admixtures that shorten cycle times and shrink cement consumption. Sika's integration of MBCC is slated to deliver CHF 180-200 million in annual synergies by 2026, underpinning broader portfolios that address concrete, flooring and sealant demands simultaneously. Henkel's acquisition of Seal For Life enlarges its offering in long-life anticorrosion wraps tailored to coastal infrastructure. Regional formulators also localize additives to match tropical humidity and seismic stresses, winning share from imports less attuned to local job-site realities.

The Southeast Asia Construction Chemicals Market Report Segments the Industry by Product Type (Adhesives, Concrete and

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Cement Admixtures, Flame Retardants, and More), Application (Commercial, Industrial, Infrastructure, and Residential), Function (Strength Enhancement, Durability and Corrosion Protection, and More), and Geography (Indonesia, Vietnam, Philippines, Thailand, Malaysia, Singapore, and Rest of Southeast Asia).

List of Companies Covered in this Report:

3M / Akzo Nobel N.V. / Arkema / Ashland / BASF SE / Dow / H.B. Fuller / Henkel AG & Co. KGaA / Holcim / MAPEI S.p.A. / Nippon Paint Holdings Co., Ltd. / Pidilite Industries Ltd. / RPM International Inc. / Saint Gobain / Sika AG / The Euclid Chemical Company / Wacker Chemie AG /

Additional Benefits:

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

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