

Global Liquid-Applied Membrane Market Size Study & Forecast, by Product Type, Application, Substrate, and Regional Forecasts 2025–2035

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Abstracts

The Global Liquid-Applied Membrane Market is valued at approximately USD 2.35 billion in 2024 and is anticipated to witness a steady growth trajectory with a CAGR of over 5.48% during the forecast period 2025 to 2035. Liquid-applied membranes (LAMs) are transforming modern construction paradigms by offering superior waterproofing capabilities and seamless, adaptable coverage across complex architectural structures. As industries and municipalities increasingly prioritize durability, energy efficiency, and environmental resistance, these fluid-applied systems are replacing conventional sheet membranes in both new construction and retrofitting projects. Innovations in polymer chemistry, coupled with enhanced adhesion and elasticity, are reinforcing the widespread deployment of LAMs in critical areas such as roofing systems, underground tunnels, swimming pools, and water containment structures.

The uptick in global infrastructure development—particularly in urbanized zones—has driven demand for robust and flexible waterproofing solutions. With climate change intensifying and water ingress becoming a more frequent challenge, there is a surging inclination toward siloxane-, polyurethane-, and acrylic-based LAMs that offer high-performance waterproofing while reducing long-term maintenance costs. Furthermore, the hybridization of liquid membrane formulations is fostering cross-functional solutions that cater to multiple substrate types including concrete, metal, and wood. The proliferation of LEED-certified and green buildings has also propelled demand for eco-conscious membrane systems that are both VOC-compliant and thermally efficient.

Regionally, North America has emerged as a frontrunner in the liquid-applied membrane market, benefiting from stringent building codes, harsh climatic variations, and a mature commercial construction sector. The United States, in particular, is

witnessing large-scale adoption of polyurethane and acrylic-based membranes in retrofitting projects for public infrastructure and aging commercial buildings. Meanwhile, Europe is swiftly catching up, especially in countries like Germany, the UK, and France, where waterproofing standards and energy-efficient building mandates are reinforcing market growth. Asia Pacific, driven by the expanding construction footprint in China, India, and Southeast Asia, is poised to be the fastest-growing region. Rapid urbanization, rising disposable income, and major public infrastructure investments are propelling the adoption of LAMs, particularly in underground tunnels, basements, and commercial roofing applications.

Major market players included in this report are:

BASF SE

Sika AG

GCP Applied Technologies Inc.

Fosroc International Ltd.

MAPEI S.p.A

Tremco Incorporated

Carlisle Companies Inc.

Saint-Gobain Weber

Pidilite Industries Limited

Johns Manville

RPM International Inc.

The Dow Chemical Company

Polyglass S.p.A

H.B. Fuller Company

GAF Materials Corporation

Global Liquid-Applied Membrane Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast Period – 2025–2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players.

The detailed segments and sub-segments of the market are explained below:

By Product Type:

Siloxane-Based Liquid Applied Membranes

Acrylic-Based Liquid Applied Membranes

Polyurethane-Based Liquid Applied Membranes

Hybrid Liquid Applied Membranes

By Application:

Roofing

Underground Structures

Tunnels and Bridges

Swimming Pools and Water Features

By Substrate:

Concrete

Metal

Wood

Others

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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