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Flexible Waterproofing Membranes Market Size, Share & Trends Analysis Report By Product Type (Bituminous Membranes, PVC Membranes, TPO Membranes), By Application (Roofing, Walls & Facades, Water & Wastewater), By End-use, By Region, And Segment Forecasts, 2026 - 2033

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Abstracts

The global flexible waterproofing membranes market size was valued at USD 9.9 billion in 2025 and is projected to grow from USD 10.6 billion in 2026 to USD 17.3 billion by 2033, at a CAGR of 7.3% from 2026 to 2033. Asia Pacific dominated the market, accounting for a revenue share of 40.7% in 2025. The market growth is driven by increasing construction activity, infrastructure development, and the growing need to protect buildings and civil structures from water ingress, moisture, and weather-related deterioration.

Demand is increasing across residential, commercial, industrial, and infrastructure projects, where waterproofing is required for roofs, foundations, basements, walls, tunnels, bridges, and other exposed or below-grade structures.

Rising urbanization and population growth are driving new construction, while the aging building stock in developed economies is creating additional demand for the renovation and replacement of existing waterproofing systems. Increasing awareness regarding structural durability and lifecycle maintenance is further supporting the adoption of reliable flexible membrane solutions.

The market is witnessing increasing adoption of polymer-based and modified bituminous membranes that provide flexibility, durability, weather resistance, and

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improved resistance to mechanical stresses. TPO, PVC, and EPDM membranes are gaining importance in roofing and building-envelope applications because of their lightweight characteristics, resistance to UV exposure, and ability to accommodate building movement.

Modified bituminous membranes continue to see strong demand due to established installation practices, broad application suitability, and cost competitiveness. Manufacturers are also developing multilayer and reinforced membrane systems to improve puncture resistance, dimensional stability, service life, and overall waterproofing performance.

Sustainability, energy efficiency, and installation productivity are increasingly influencing product development across the flexible waterproofing membranes market. Manufacturers are focusing on membranes with improved recyclability, longer service lives, lower environmental impact, and compatibility with energy-efficient roofing systems. Self-adhesive, mechanically fastened, and heat-weldable membranes are also gaining attention for their ability to simplify installation and improve seam reliability. In addition, reflective and energy-efficient roofing membranes are being increasingly incorporated into building projects to reduce heat absorption and support broader energy-management objectives.

Global Flexible Waterproofing Membranes Market Report Segmentation

This report forecasts revenue growth at the global, regional & country levels and provides an analysis of the industry trends in each of the sub-segments from 2021 to 2033. For this study, Grand View Research has segmented the flexible waterproofing membranes market report based on product type, application, end-use, and region:

Product Type Outlook (Revenue, USD Million, 2021 - 2033)

Bituminous Membranes

PVC Membranes

TPO Membranes

EPDM Membranes

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Other Products

Application Outlook (Revenue, USD Million, 2021 - 2033)

Roofing

Walls & Facades

Foundations & Below-Grade Structures

Water & Wastewater

Other Applications

End-use Outlook (Revenue, USD Million, 2021 - 2033)

Residential Buildings

Commercial Buildings

Industrial Facilities

Civil Infrastructure

Regional Outlook (Revenue, USD Million, 2021 - 2033)

North America

U.S.

Canada

Mexico

Europe

UK

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Germany

France

Italy

Spain

Asia Pacific

China

Japan

India

South Korea

Central and South America

Brazil

Middle East and Africa

Saudi Arabia

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