

Waterproofing Membranes Market Report by Product (Liquid Applied Membranes, Sheet Membranes), Usage (Refurbishment, New Construction), Application (Roofing and Walls, Water and Waste Management, Building Structures, Tunnel Liners, Bridges and Highways), and Region 2024-2032

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Abstracts

The global waterproofing membranes market size reached US\$ 27.3 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 44.2 Billion by 2032, exhibiting a growth rate (CAGR) of 5.4% during 2024-2032. The increasing construction of residential and commercial spaces, rising development of smart and self-healing adhesives, and the growing investment in research and development (R&D) activities are some of the major factors propelling the market.

Waterproofing membranes are specialized materials used in construction to create a barrier that prevents the passage of water or moisture through building structures. They can withstand exposure to environmental factors like ultraviolet (UV) rays, temperature fluctuations, and chemicals. They extend the lifespan of buildings by protecting them from water-related issues, such as corrosion, mold, and structural damage. They are applied to outdoor areas like plazas, decks, and balconies to protect the underlying structure and prevent water damage. Besides this, they are utilized in water containment structures to avoid leakage and maintain water quality.

Rapid urbanization and the increasing population across the globe are positively influencing the market. Additionally, the rising need to renovate and remodel existing structures to meet modern building standards is driving the demand for waterproofing membranes. Apart from this, the rise in extreme weather events, such as hurricanes

and heavy rainfall, is catalyzing the demand for robust waterproofing solutions. Furthermore, the increasing construction of bridges, tunnels, and transportation systems is driving the need for waterproofing solutions to ensure their longevity and functionality. Moreover, the leading market players are investing in research and development (R&D) activities in material science and construction technologies to develop more advanced and efficient waterproofing membranes.

Waterproofing Membranes Market Trends/Drivers:

Rising construction activities

The increasing construction activities of residential and commercial spaces across the globe represent one of the key factors catalyzing the demand for waterproofing membranes to protect the infrastructure from water damage. Waterproofing membranes help in ensuring the longevity and durability of buildings, especially in areas prone to heavy rainfall or flooding. Additionally, the construction industry is witnessing a shift towards sustainable and energy-efficient building practices. Waterproofing membranes that offer both waterproofing and insulation properties align with this trend. These green building practices are further driving the demand for advanced and eco-friendly waterproofing solutions that generate minimal carbon footprint and promote environmental health.

Stringent building regulations and standards

The governing authorities and regulatory bodies of various countries are imposing stricter building codes and standards related to water management and building safety. Additionally, the increasing use of waterproofing membranes to provide an effective means of preventing water ingress and ensuring structural integrity is offering a favorable market outlook. Waterproofing membranes act as a protective barrier, preventing water from seeping into the construction materials and contributing to the overall longevity of buildings. Furthermore, the growing environmental concerns and the rising emphasis on sustainability to promote environmental health are encouraging manufacturers to develop eco-friendly waterproofing membranes with optimal durability and energy efficiency.

Technological advancements

The development of modern waterproofing membranes with superior performance, ease of installation, and longer lifespans is influencing the market positively. Additionally, the leading industry investors are focusing on introducing innovative products, which

include self-adhesive membranes with convenient installation and reduced labor costs. Apart from this, the development of composite membranes is attracting a wider consumer base. These membranes combine multiple layers or materials to enhance durability and insulation properties. Furthermore, the launch of smart and self-healing membranes is contributing to the market growth. These innovative products can autonomously detect and repair small leaks or damages and aid in reducing the risk of water infiltration.

Waterproofing Membranes Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global waterproofing membranes market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on product, usage and application.

Breakup by Product:

Liquid Applied Membranes

Cementitious

Bituminous

Polyurethane

Acrylic

Other

Sheet Membranes

Bituminous

Polyvinyl Chloride (PVC)

Ethylene Propylene Diene Monomer (EPDM)

Other

Liquid applied membranes dominate the market

The report has provided a detailed breakup and analysis of the market based on the product. This includes liquid applied membranes [cementitious, bituminous, polyurethane, acrylic, and other] and sheet membranes [bituminous, polyvinyl chloride (PVC), ethylene propylene diene monomer (EPDM), and other]. According to the report, liquid applied membranes hold the largest market share as they are versatile, seamless coatings used in various construction applications to provide effective waterproofing and protective barriers. These membranes are composed of polymer-based compounds, making them highly flexible and adaptable to different surfaces and shapes. Apart from this, they bond tightly to substrates, creating a seamless and watertight barrier that

prevents water infiltration and protects against moisture-related issues, such as leaks, mold growth, and structural deterioration. Furthermore, they are commonly used in roofing systems, wherein they provide excellent protection against water damage. Moreover, as liquid applied membranes offer durability and can withstand harsh climatic conditions, they are employed in below-grade waterproofing applications for foundations and basements.

Breakup by Usage:

Refurbishment

New Construction

New construction holds the largest market share

A detailed breakup and analysis of the market based on the usage has also been provided in the report. This includes refurbishment and new construction. According to the report, new construction dominates the market as waterproofing membranes are applied to the foundation walls and basement floors of new buildings. These membranes create a barrier that prevents water from seeping into the foundation, protecting it from moisture-related damage. This promotes energy efficiency, insulation, and environmental sustainability. Apart from this, they are used on flat or low-slope roofs to prevent water from penetrating the building envelope. They act as a protective layer, keeping the underlying structure dry and extending the lifespan of the roof. Furthermore, they are applied in swimming pools and water features to prevent water from leaking into the ground. They also protect the surrounding structures from water damage.

Breakup by Application:

Roofing and Walls

Water and Waste Management

Building Structures

Tunnel Liners

Bridges and Highways

Roofing and walls represent the largest market segment

The report has provided a detailed breakup and analysis of the market based on the application. This includes roofing and walls, water and waste management, building

structures, tunnel liners, and bridges and highways. According to the report, roofing and walls account for the largest market share due to the increasing use of waterproofing membranes on flat or low-slope roofs, wherein traditional pitched roofs are not feasible. These membranes create a watertight barrier that prevents rainwater and moisture from infiltrating the building. Additionally, roofing membranes provide seamless protection because they are typically applied in a continuous sheet. This eliminates the vulnerabilities associated with seams or joints that can occur with other roofing materials, such as shingles or tiles. Apart from this, waterproofing membranes are widely used for basement walls to prevent water infiltration. They create a barrier that shields the interior space from groundwater, minimizing the risk of flooding, mold growth, and structural damage.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

Asia Pacific exhibits a clear dominance, accounting for the largest waterproofing membranes market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific accounted for the largest market share since the region experiences diverse climatic conditions, including heavy rainfall and monsoons in many areas. Consequently, there is a rise in the demand for effective waterproofing solutions to protect buildings and infrastructure from water damage. Additionally, rapid urbanization and the increasing population are driving the demand for waterproofing membranes. Apart from this, governments and regulatory bodies in Asia-Pacific countries are increasingly implementing stricter building codes and standards related to water management and safety. These regulations emphasize the use of waterproofing membranes, further stimulating market growth. Moreover, Asia-Pacific is witnessing a shift towards sustainable building practices and green construction.

Competitive Landscape:

Waterproofing membrane manufacturers are investing in R&D activities to develop advanced materials and technologies. They are focusing on the development of membranes with improved performance, durability, and sustainability. This includes innovations in composite materials, self-healing technologies, and eco-friendly materials. Additionally, they are innovating and promoting eco-friendly products with minimal carbon emissions and energy-efficient properties. Apart from this, they are actively engaged in marketing and educational initiatives to raise awareness about the importance of waterproofing in construction. They are also collaborating with architects, engineers, and contractors to provide training and promote best practices. Furthermore, many companies are implementing stringent quality control processes to meet or exceed industry standards and regulations.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

BASF SE

Carlisle Companies Incorporated

Dow Inc.

Firestone Building Products (Holcim Group)
Fosroc Inc. (JMH Group)
GAF Materials Corporation (Standard Industries)
GCP Applied Technologies (W. R. Grace and Company)
Johns Manville (Berkshire Hathaway Inc.)
Mapei S.p.A
Paul Bauder GmbH & Co. KG
Renolit SE (JM Holding GmbH & Co. KGaA)
Sika AG
Soprema S.A.S.

Recent Developments:

In March 2020, Sika AG developed a new production facility in Switzerland for the manufacturing of SikaProof® structural waterproofing membrane that would help the company in providing better services to the growing market and support its manufacturing efficiency.

In January 2020, BASF SE introduced an innovative waterproofing membrane, MasterSeal® 730 UVS in Asia, to expand its versatile waterproofing portfolio under its Master Builders Solutions brand.

In June 2021, Carlisle Companies Incorporated announced that construction has begun on Carlisle Construction Materials' (CCM) sixth TPO manufacturing line to produce the first 16-foot-wide TPO membranes of the commercial roofing industry.

Key Questions Answered in This Report

1. What was the size of the global waterproofing membranes market in 2023?
2. What is the expected growth rate of the global waterproofing membranes market during 2024-2032?
3. What are the key factors driving the global waterproofing membranes market?
4. What has been the impact of COVID-19 on the global waterproofing membranes market?
5. What is the breakup of the global waterproofing membranes market based on the product?
6. What is the breakup of the global waterproofing membranes market based on the usage?
7. What is the breakup of the global waterproofing membranes market based on application?
8. What are the key regions in the global waterproofing membranes market?
9. Who are the key players/companies in the global waterproofing membranes market?

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