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Geomembrane Market Assessment, By Raw Material [High-density Polyethylene, Low-density Polyethylene, Linear Low-density Polyethylene, Polyvinyl Chloride, Ethylene Propylene Diene Monomer, Polypropylene, Others], By Product Type [Geosynthetic Clay Liner, Thermoplastic Sheet Liner, Rubber Liner, Concrete Geocomposite Liner, Pond Liner, Others], By Manufacturing Process [Extrusion, Calendaring, Blow Film, Others], By Application [Waste Management, Mining, Construction, Agriculture, Oil and Gas, Others], By Region, Opportunities and Forecast, 2016-2030F

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Abstracts

Global geomembrane market size was estimated to be 201.96 million square meters in 2022, which is expected to reach 282.84 million square meters in 2030, with a CAGR of 4.3% for the forecast period between 2023 and 2030.

The ongoing investment in the new manufacturing facilities for geomembrane will accelerate product availability across various regions, thereby creating a favorable growth scenario for the market during the projected forecast period.

The leading share of the waste management industry is boosting the global geomembrane market. For instance, in September 2022, LANXESS, a leading global chemical industry player, launched a new USD 12.65 million (EURO 12 million)

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wastewater treatment plant in Belgium. The wastewater treatment plant has a processing capacity of 260,000 liters per hour.

The growth of civil construction projects at the global level is augmenting traction for the geomembrane market. For instance, according to the recent data published by Invest India, a nodal government of India website, the Indian construction Industry will reach USD 1.4 trillion in 2025.

The increasing government investment in developing new waste management facilities, stringent regulations for wastewater processing, and the increasing development of industrial waste management projects are driving the growth of waste management activities. Additionally, the increase in civil engineering projects is attributed to rising investment in commercial buildings, increasing public-private partnerships to construct infrastructure projects and the surging demand for affordable housing schemes. As a result, the increase in investment for civil construction projects and the rising application of waste management fuel the demand for geomembranes to ensure minimized contamination risks, amplifying market growth. However, several performance limitations associated with geomembranes, such as low flexibility, higher weight, poor resistance, and less custom fabrication, pose a major bottleneck for market growth.

Increasing Adoption of Geomembrane in the Waste Management Activities

The key performance benefits of geomembrane include leak prevention, superior cost-effectiveness, longevity, and excellent environmental protection. Thus, due to the above benefits, geomembranes are widely utilized in waste management applications such as landfill construction to prevent the bleaching of leachate and other contaminants into the surrounding environment. In recent years, the adoption of geomembranes has increased in countries such as India, Spain, Germany, and the United States to benefit from sustainable waste management.

For instance, in June 2023, Sotrafa, a Spain-based geomembrane manufacturer, supplied Alvatech Geomembrane HDPE 2 FIX 2.5mm to Waste Management Centre (WMC) Biljane Donje in Croatia. The Waste Management Centre (WMC) Biljane Donje has a waste processing capacity of 180,000 tons per annum in 46 hectares. In addition, in March 2022, OCEAN GLOBAL, a geomembrane manufacturer, supplied 5,500 square meters of high-density polyethylene (HDPE) geomembrane to the Chennai government for application in landfills. As a result, it is evident from the data that the adoption of geomembrane is increasing in waste management applications, fostering market growth.

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Expansion of Geomembrane Manufacturing Facilities

The global players in the geomembrane market are leveraging their investments to develop new manufacturing facilities or expand the existing plants to ensure cost-effective production, quality control, and production in bulk quantity. Likewise, the geomembrane manufacturers dealing in producing lower availability variants such as ethylene–vinyl alcohol (EVOH) are commissioning new manufacturing plants to ensure market leadership in the focused geomembrane variant.

For illustration, in September 2023, Megaplast, among the leading manufacturers offering an EVOH-based geomembrane liner, commissioned the 7-layer manufacturing line. The commissioning of a new geomembrane line will enable Megaplast to produce gas barrier liners and other specialty films for the growing demands from the construction and environmental industries. Therefore, developing new manufacturing facilities for geomembranes will foster the supply of products in the international market, thereby creating a lucrative potential for the market's growth in the forecast period.

Share of Asia-Pacific to Dominate in the Geomembrane Market

Asia-Pacific is a key marketplace for the geomembrane industry as the region has the presence of established market players, higher demand from various end-use industries, the development of new infrastructure projects, and the imposition of stringent waste management regulations. Hence, the demand for geomembranes is increasing in Asia-Pacific.

For instance, in August 2023, BPM Geosynthetics installed an HDPE geomembrane pond liner for the Shrimp Pond Project in Malaysia. The product has superior performance features such as excellent chemical resistance, lowest permeability, cost-effective, proven performance, and superior UV resistance. Thus, the increasing utilization of geomembranes in Asia-Pacific is augmenting the market's growth.

Impact of COVID-19

The restrictions imposed due to the COVID-19 pandemic in 2020 in various regions significantly impacted the construction of new water and wastewater treatment projects. For instance, in April 2020, the construction of a sewage treatment plant in Naples was halted due to the imposition of social distancing norms. Thus, the halt in the construction of water and wastewater treatment plants, civil construction activities, and

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oil and gas production resulted in a decline in the revenue growth of the global geomembrane market in 2020.

However, the ease of COVID-19 restrictions by the end of 2020, led to improved market conditions for the global geomembrane industry. Likewise, in the coming years, it is anticipated that the impact of the COVID-19 pandemic will be negligible, which will lead to a favorable global geomembrane industry outlook during the projected forecast period.

Impact of Russia Ukraine War

The Russian invasion of Ukraine has drastically impacted the supply of materials since several Western countries placed severe bans on trade and imports from Russia. The supply chain across Europe was severely affected due to the closure of rail and road transportation services surrounding the Russian border. Thus, such dreadful conditions led to limited exports and imports growth across Russia and European countries. The construction industry across Europe has severely impacted by the Russia-Ukraine war.

For instance, according to the recent statistics published by the European Construction Industry Federation (FIEC), a European Union construction industry association, the house dwelling projects in the European Union region registered a decline of 0.2% in 2022. Thus, imports of Russian products have disrupted the activity flow, resulting in diminished economic growth in several countries. However, significant efforts from European companies generated a massive opportunity for the geomembrane market, due to which the impact of the Russia-Ukraine war was limited on the global geomembrane market.

Key Players Landscape and Outlook

The prominent manufacturers with a strong market presence in global geomembrane market are Agru America Inc., Solmax, Nilex Inc., and Naue GmbH & Co. KG. The above-mentioned players have a strong market presence in regions such as Asia-Pacific, North America, and Europe. The dominant players indulged in manufacturing the geomembrane product range have highly advanced research and development capabilities. As a result, the leading players involved in the manufacturing of the geomembrane product range are adopting strategies such as new technology launches, partnerships, and acquisitions.

In April 2021, Solmax, a leading geomembrane manufacturer in Canada acquired

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TenCate Geosynthetics. TenCate Geosynthetics is involved in the manufacturing of the geomembrane product range. The prime focus of the acquisition is to boost the revenue share of Solmax in the global geomembrane market.

In February 2020, AGRU America Inc., a global player involved in the manufacturing of the geomembrane launched CLEANSEAM, a new product configuration for AGRU geomembrane liner to integrate a protective release film on the geomembrane weld edges. CLEANSEAM eliminates the potential for waste materials, fine soils, and stockpile dust from meeting seaming areas prior or during to geosynthetic installation. Therefore, the recent technological innovations related to the geomembrane will drive market growth in the coming years.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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