

PVC Waterproofing Membrane Global Market Insights 2026, Analysis and Forecast to 2031

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Abstracts

PVC Waterproofing Membrane Market Summary

The global polyvinyl chloride (PVC) waterproofing membrane market sits at the intersection of heavy petrochemical manufacturing and advanced building envelope engineering. Current conservative projections place the market valuation between \$3.0 billion and \$3.2 billion by 2026, advancing at a compound annual growth rate (CAGR) of 4.7% to 5.7% through 2031. This expansion is heavily tied to the structural shift away from traditional multi-ply bituminous roofing toward high-performance single-ply thermoplastic solutions. PVC membranes, alongside Ethylene Propylene Diene Monomer (EPDM) and Thermoplastic Polyolefin (TPO), form the triad of macromolecular waterproofing solutions dominating modern construction. Within this triad, PVC distinguishes itself through superior chemical resistance, exceptional fire retardancy, and highly reliable hot-air weldable seams.

Macro-Economic and Structural Context

Understanding the trajectory of the PVC membrane sector requires assessing the foundational raw material landscape. The broader global PVC industry produces between 40 million and 50 million tons annually. China serves as the dominant anchor of this supply chain, generating and consuming over 20 million tons per year. This massive production base underpins the economics of the membrane market, dictating global pricing floors and export dynamics.

Unlike EPDM, which relies heavily on the vulcanization of synthetic rubber, or TPO, which blends polypropylene and ethylene-propylene rubber, PVC membranes are thermoplastic formulations heavily reliant on additives. Raw PVC resin is inherently rigid. Manufacturers must engineer flexibility through the precise integration of liquid plasticizers, while UV stabilizers and biocides dictate the material's long-term environmental endurance. The commercial viability of these membranes depends directly on chemical formulation stability, as premature plasticizer migration

compromises the structural integrity of the building envelope.

Regional Market Dynamics

North America

The North American market projects a steady growth range of 4.5% to 5.5% over the forecast period. Demand here is structurally linked to massive commercial real estate footprints and rigorous energy efficiency mandates. The Sunbelt region drives significant volume due to the inherent reflective properties of white PVC membranes, which reduce structural cooling loads and comply with stringent 'cool roof' urban heat island mitigation policies. The regulatory environment strongly favors thermoplastic systems that offer Class A fire ratings, pushing legacy built-up roofing (BUR) systems into obsolescence. Retrofit and re-roofing projects account for a dominant share of market activity, shielding membrane manufacturers from the cyclical volatility of new construction starts.

Asia-Pacific

Asia-Pacific represents the epicenter of volumetric consumption and raw material production, with regional growth estimated between 6.0% and 7.0%. China commands market direction through its absolute dominance in upstream PVC resin synthesis. Production pathways in the region often diverge from Western models, relying heavily on the coal-intensive calcium carbide route rather than the ethylene-based route. Rapid urbanization and aggressive industrial infrastructure spending drive immense domestic demand. Major infrastructure nodes, underground transit systems, and high-density residential developments mandate advanced waterproofing. Export pathways are aggressively expanding, with regional manufacturers shipping high volumes of rolled goods to emerging construction hubs across Southeast Asia and the broader Pacific Rim, including targeted distribution networks in Taiwan, China.

Europe

Operating under the strictest regulatory frameworks globally, the European market anticipates growth between 3.5% and 4.5%. The European Union's Energy Performance of Buildings Directive (EPBD) fundamentally alters procurement strategies, forcing architects to specify building materials that contribute directly to net-zero carbon targets. European demand favors highly engineered, thick-mil membranes with specialized non-phthalate plasticizers to comply with REACH (Registration, Evaluation, Authorisation and Restriction of Chemicals) regulations. The region also leads in green roof architecture, where PVC's inherent root resistance provides a decisive technical advantage over EPDM. Demand is particularly robust in Germany, the Nordics, and the UK, where specialized contractors demand flawless heat-welding performance in challenging, low-temperature installation environments.

South America and Middle East & Africa

Emerging regional markets display divergent structural drivers. South America forecasts

a 4.0% to 5.0% growth trajectory, constrained periodically by currency devaluation and capital access but supported by necessary urban infrastructure modernization. The Middle East and Africa (MEA) region projects a 5.0% to 6.0% expansion rate. The MEA climate represents the ultimate stress test for polymer chemistry. Extreme thermal cycling and intense ultraviolet degradation require hyper-stabilized PVC formulations. In Gulf Cooperation Council (GCC) states, commercial mega-projects and large-scale desalination plants utilize heavy-duty PVC membranes to protect high-value critical infrastructure from pervasive moisture and high-salinity air.

Application and End-Use Segmentation

Commercial and Industrial Construction

Commercial roofing represents the overwhelming volume driver for PVC membranes globally. Low-slope and flat roof architectures dominate retail spaces, warehousing logistics, aviation hangars, and the rapidly proliferating data center sector. The modern e-commerce fulfillment center requires hundreds of thousands of square feet of uninterrupted weatherproofing. PVC secures its market position here through seam strength. Installers use automated hot-air welding equipment to fuse membrane overlaps into a monolithic, watertight shield. The resulting seams are physically stronger than the membrane itself, neutralizing the primary failure point of taped EPDM systems. Furthermore, industrial facilities exposed to caustic chemicals, industrial exhausts, or animal fats heavily specify PVC. The polymer's base chemistry resists hydrocarbon degradation far better than TPO or EPDM, making it the default specification for food processing facilities, manufacturing plants, and airport infrastructures exposed to jet fuel residues.

Residential Construction

The penetration of PVC in the residential sector exhibits distinct localized patterns. Historically limited to multi-family housing complexes and high-rise condominiums with flat roofs, the material is actively capturing share in specialized single-family applications. Architectural shifts toward modern, flat-roofed luxury homes elevate demand for aesthetic, high-performance thermoplastic systems.

Beyond roofing, PVC serves as a critical subterranean barrier. Residential foundations, deep basements, and retaining walls utilize unreinforced or fleece-backed PVC membranes to intercept hydrostatic pressure. As urban density increases, developers utilize deep subterranean space for parking and utilities, necessitating zero-tolerance moisture barriers. Custom-fabricated PVC waterstops and tunnel lining systems represent high-margin niches adjacent to standard rolled goods.

Value Chain and Supply Chain Analysis

Upstream Dynamics and Resin Dependency

The base of the value chain is tethered to the chlor-alkali industry. PVC is unique among commodity plastics because it is roughly 57% chlorine and 43% carbon by

weight. This reduces direct dependency on fluctuating crude oil prices relative to 100% hydrocarbon-based polymers like polyethylene. However, the energy-intensive nature of chlorine extraction exposes resin producers to regional electricity pricing constraints. When global energy grids experience pricing shocks, upstream PVC resin costs fluctuate, immediately compressing margins for midstream membrane manufacturers.

Additive Engineering and Formulation Precision

The technical chokepoint of the supply chain lies in chemical formulation. Raw PVC requires massive infusions of plasticizers, often up to 30% to 40% by weight, to transition from rigid pipe material to flexible roofing membrane. The historical reliance on low-cost liquid phthalates is fracturing. Chemical regulators mandate transitions to safer, high-molecular-weight polymeric plasticizers. This forces membrane manufacturers into continuous, capital-intensive R&D to prevent plasticizer exudation. If a liquid plasticizer migrates out of the polymer matrix over a decade of thermal cycling, the membrane shrinks, embrittles, and inevitably fails.

Manufacturing and Capital Intensity

Transforming compounded PVC into finished rolled goods requires heavy capital investment in calendering or extrusion lines. High-performance membranes utilize a multi-layer architecture. A typical configuration includes a top weathering layer loaded with titanium dioxide for UV reflectivity, an internal reinforcing scrim made of woven polyester or fiberglass for dimensional stability, and a dark bottom layer. The physical integration of these layers at high temperatures demands strict quality control. Microscopic voids during the extrusion process lead to catastrophic delamination under field conditions.

Downstream Distribution and Installation Moats

The final link in the value chain involves a specialized distribution network and certified installation contractors. Membrane manufacturers actively construct high barriers to entry through contractor certification programs. Warranty issuance, often spanning 15 to 25 years, is contingent upon installation by brand-certified crews. This creates deep ecosystem lock-in. A commercial roofing contractor heavily invested in hot-air welding equipment and training for one specific PVC brand faces immense switching costs to adopt a competitor's system.

Competitive Landscape

The global competitive matrix is fractured into highly capitalized multinational building material conglomerates, deeply integrated Chinese industrial giants, and specialized European technical manufacturers. Capital deployment strategies, vertical integration, and regional dominance define market positioning.

Global Construction Material Heavyweights

A tier of massive multinationals dictates Western market dynamics through aggressive acquisition strategies and comprehensive building envelope portfolios. Sika AG and

Holcim Ltd operate at the apex of this tier. Holcim's systematic absorption of legacy roofing brands underscores a strategic pivot toward advanced roofing and waterproofing systems. Compagnie de Saint-Gobain SA and MAPEI SpA leverage vast global distribution networks, integrating PVC membranes into broader architectural material packages. North American heavyweights, including GAF Materials LLC, Carlisle Construction Materials LLC, and Johns Manville Corporation, dominate the domestic flat-roof market. These entities maintain immense pricing power and lock down commercial specification through ironclad relationships with architectural and engineering firms. BMI Group and Soprema Group consolidate power across the European and trans-Atlantic corridors, leveraging deep technical catalogs that include specialized fleece-backed and highly reinforced PVC architectures.

Chinese Market Leaders

The Chinese waterproofing sector operates at massive scale, fueled by the domestic raw material engine and deep integration into municipal infrastructure ecosystems. Beijing Oriental Yuhong Waterproof Technology Co Ltd leads the pack, representing a sprawling enterprise that captures vast swathes of civil engineering and commercial development projects. Key regional powers including Keshun Waterproof Technologies Co Ltd, Shenzhen Joaboa Technology Co Ltd, and Hongyuan Waterproof Materials Co Ltd scale operations aggressively alongside the national urbanization push. Entities like Weifang Yuhong Waterproofing Materials Co Ltd, Liaoning Dayu Waterproof Material Group Co Ltd, and Jiangsu Canlon Building Materials Co Ltd optimize production efficiencies by localizing supply chains near heavy chemical corridors. Beijing New Building Materials Public Company Limited and Yuzhongqing Waterproof Technology Group Co Ltd integrate governmental infrastructure mandates with mass production capabilities. Shandong Yinhe Waterproof Materials Co Ltd and SKSHU Paint Co Ltd (3Trees) are expanding their chemical material footprints to include comprehensive polymer waterproofing lines. Facing maturing domestic real estate cycles, these Chinese giants are strategically pivoting toward industrial infrastructure upgrades and aggressive export campaigns into the Middle East, Southeast Asia, and Africa.

European and Regional Specialists

A distinct cohort of manufacturers excels through technical specialization rather than pure volume. Renolit SE and Protan AS represent the pinnacle of European polymer engineering, focusing on highly customized, durable formulations designed for extreme environments. TechnoNICOL Corporation commands vast geographical reach across Eastern Europe and Northern Asia, optimizing logistics networks across massive landmasses. Danosa and Paul Bauder GmbH & Co KG focus heavily on the intersection of waterproofing and environmental sustainability, engineering systems specifically optimized for green roofs, solar panel integrations, and stringent European building

codes. Fosroc International Ltd rounds out the competitive map with deep entrenchment in the Middle East and Asia, leveraging highly localized technical support for complex civil engineering challenges.

Opportunities and Challenges

Opportunities in Energy Efficiency and Smart Infrastructure

The legislative push toward energy-efficient building envelopes provides structural market tailwinds. Regulatory bodies increasingly mandate high-albedo roofing surfaces to combat urban heat island effects. White PVC membranes naturally reflect solar radiation, drastically lowering HVAC energy consumption in sprawling commercial facilities. This dynamic allows membrane manufacturers to position their products not merely as moisture barriers, but as active components in corporate ESG (Environmental, Social, and Governance) compliance.

The proliferation of rooftop solar installations creates a secondary growth vector.

Photovoltaic arrays require a highly durable, fire-resistant substrate. The class-leading fire retardancy of PVC makes it the preferred membrane beneath large-scale commercial solar farms. Concurrently, the explosive growth of hyper-scale data centers demands infallible moisture protection for billion-dollar hardware assets, generating highly lucrative, massive-scale single-project contracts.

Challenges in Polymer Stability and Competitive Substitution

Despite strong commercial positioning, the industry faces severe structural headwinds regarding chemical formulation. Plasticizer migration remains the Achilles' heel of PVC waterproofing. Prolonged exposure to standing water, chemical contaminants, and high thermal loads accelerates the leaching of liquid plasticizers. This phenomenon shrinks the membrane, placing immense physical stress on mechanical fasteners and welded seams, ultimately precipitating roof failure. Re-engineering these formulations with solid polymeric plasticizers significantly increases manufacturing costs.

Simultaneously, the competitive threat from alternate macromolecular solutions is intense. TPO membranes aggressively cannibalize PVC market share, particularly in North America. TPO requires no plasticizers, sidestepping the migration issue entirely, and often competes at a lower price point per square foot. EPDM continues to dominate environments requiring extreme freeze-thaw flexibility. PVC manufacturers must continuously justify their higher capital costs through demonstrable lifetime value, relying heavily on the unassailable strength of hot-air welded seams and superior chemical resistance to secure architectural specification. Volatility in global chlor-alkali production and shifting environmental mandates surrounding heavy-metal stabilizers and phthalates force constant recalibration of operational and pricing models across the global supply chain.

Contents

CHAPTER 1 EXECUTIVE SUMMARY

CHAPTER 2 ABBREVIATION AND ACRONYMS

CHAPTER 3 PREFACE

- 3.1 Research Scope
- 3.2 Research Sources
 - 3.2.1 Data Sources
 - 3.2.2 Assumptions
- 3.3 Research Method

CHAPTER 4 MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 Classification/Types
- 4.3 Application/End Users

CHAPTER 5 MARKET TREND ANALYSIS

- 5.1 Introduction
- 5.2 Drivers
- 5.3 Restraints
- 5.4 Opportunities
- 5.5 Threats

CHAPTER 6 INDUSTRY CHAIN ANALYSIS

- 6.1 Upstream/Suppliers Analysis
- 6.2 PVC Waterproofing Membrane Analysis
 - 6.2.1 Technology Analysis
 - 6.2.2 Cost Analysis
 - 6.2.3 Market Channel Analysis
- 6.3 Downstream Buyers/End Users

CHAPTER 7 LATEST MARKET DYNAMICS

- 7.1 Latest News
- 7.2 Merger and Acquisition
- 7.3 Planned/Future Project
- 7.4 Policy Dynamics

CHAPTER 8 TRADING ANALYSIS

- 8.1 Export of PVC Waterproofing Membrane by Region
- 8.2 Import of PVC Waterproofing Membrane by Region
- 8.3 Balance of Trade

CHAPTER 9 HISTORICAL AND FORECAST PVC WATERPROOFING MEMBRANE MARKET IN NORTH AMERICA (2021-2031)

- 9.1 PVC Waterproofing Membrane Market Size
- 9.2 PVC Waterproofing Membrane Demand by End Use
- 9.3 Competition by Players/Suppliers
- 9.4 Type Segmentation and Price
- 9.5 Key Countries Analysis
 - 9.5.1 United States
 - 9.5.2 Canada
 - 9.5.3 Mexico

CHAPTER 10 HISTORICAL AND FORECAST PVC WATERPROOFING MEMBRANE MARKET IN SOUTH AMERICA (2021-2031)

- 10.1 PVC Waterproofing Membrane Market Size
- 10.2 PVC Waterproofing Membrane Demand by End Use
- 10.3 Competition by Players/Suppliers
- 10.4 Type Segmentation and Price
- 10.5 Key Countries Analysis
 - 10.5.1 Brazil
 - 10.5.2 Argentina
 - 10.5.3 Chile
 - 10.5.4 Peru

CHAPTER 11 HISTORICAL AND FORECAST PVC WATERPROOFING MEMBRANE MARKET IN ASIA & PACIFIC (2021-2031)

- 11.1 PVC Waterproofing Membrane Market Size
- 11.2 PVC Waterproofing Membrane Demand by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Type Segmentation and Price
- 11.5 Key Countries Analysis
 - 11.5.1 China
 - 11.5.2 India
 - 11.5.3 Japan
 - 11.5.4 South Korea
 - 11.5.5 Southeast Asia
 - 11.5.6 Australia & New Zealand

CHAPTER 12 HISTORICAL AND FORECAST PVC WATERPROOFING MEMBRANE MARKET IN EUROPE (2021-2031)

- 12.1 PVC Waterproofing Membrane Market Size
- 12.2 PVC Waterproofing Membrane Demand by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Type Segmentation and Price
- 12.5 Key Countries Analysis
 - 12.5.1 Germany
 - 12.5.2 France
 - 12.5.3 United Kingdom
 - 12.5.4 Italy
 - 12.5.5 Spain
 - 12.5.6 Belgium
 - 12.5.7 Netherlands
 - 12.5.8 Austria
 - 12.5.9 Poland
 - 12.5.10 North Europe

CHAPTER 13 HISTORICAL AND FORECAST PVC WATERPROOFING MEMBRANE MARKET IN MEA (2021-2031)

- 13.1 PVC Waterproofing Membrane Market Size
- 13.2 PVC Waterproofing Membrane Demand by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Type Segmentation and Price
- 13.5 Key Countries Analysis

- 13.5.1 Egypt
- 13.5.2 Israel
- 13.5.3 South Africa
- 13.5.4 Gulf Cooperation Council Countries
- 13.5.5 Turkey

CHAPTER 14 SUMMARY FOR GLOBAL PVC WATERPROOFING MEMBRANE MARKET (2021-2026)

- 14.1 PVC Waterproofing Membrane Market Size
- 14.2 PVC Waterproofing Membrane Demand by End Use
- 14.3 Competition by Players/Suppliers
- 14.4 Type Segmentation and Price

CHAPTER 15 GLOBAL PVC WATERPROOFING MEMBRANE MARKET FORECAST (2026-2031)

- 15.1 PVC Waterproofing Membrane Market Size Forecast
- 15.2 PVC Waterproofing Membrane Demand Forecast
- 15.3 Competition by Players/Suppliers
- 15.4 Type Segmentation and Price Forecast

CHAPTER 16 ANALYSIS OF GLOBAL KEY VENDORS

- 16.1 Sika AG
 - 16.1.1 Company Profile
 - 16.1.2 Main Business and PVC Waterproofing Membrane Information
 - 16.1.3 SWOT Analysis of Sika AG
 - 16.1.4 Sika AG PVC Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.2 Carlisle Construction Materials LLC
 - 16.2.1 Company Profile
 - 16.2.2 Main Business and PVC Waterproofing Membrane Information
 - 16.2.3 SWOT Analysis of Carlisle Construction Materials LLC
 - 16.2.4 Carlisle Construction Materials LLC PVC Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.3 Fosroc International Ltd
 - 16.3.1 Company Profile
 - 16.3.2 Main Business and PVC Waterproofing Membrane Information

- 16.3.3 SWOT Analysis of Fosroc International Ltd
- 16.3.4 Fosroc International Ltd PVC Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.4 Soprema Group
 - 16.4.1 Company Profile
 - 16.4.2 Main Business and PVC Waterproofing Membrane Information
 - 16.4.3 SWOT Analysis of Soprema Group
 - 16.4.4 Soprema Group PVC Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.5 GAF Materials LLC
 - 16.5.1 Company Profile
 - 16.5.2 Main Business and PVC Waterproofing Membrane Information
 - 16.5.3 SWOT Analysis of GAF Materials LLC
 - 16.5.4 GAF Materials LLC PVC Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.6 Holcim Ltd
 - 16.6.1 Company Profile
 - 16.6.2 Main Business and PVC Waterproofing Membrane Information
 - 16.6.3 SWOT Analysis of Holcim Ltd
 - 16.6.4 Holcim Ltd PVC Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.7 BMI Group
 - 16.7.1 Company Profile
 - 16.7.2 Main Business and PVC Waterproofing Membrane Information
 - 16.7.3 SWOT Analysis of BMI Group
 - 16.7.4 BMI Group PVC Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.8 Johns Manville Corporation
 - 16.8.1 Company Profile
 - 16.8.2 Main Business and PVC Waterproofing Membrane Information
 - 16.8.3 SWOT Analysis of Johns Manville Corporation
 - 16.8.4 Johns Manville Corporation PVC Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.9 MAPEI SpA
 - 16.9.1 Company Profile
 - 16.9.2 Main Business and PVC Waterproofing Membrane Information
 - 16.9.3 SWOT Analysis of MAPEI SpA
 - 16.9.4 MAPEI SpA PVC Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2021-2026)

16.10 Compagnie de Saint-Gobain SA

16.10.1 Company Profile

16.10.2 Main Business and PVC Waterproofing Membrane Information

16.10.3 SWOT Analysis of Compagnie de Saint-Gobain SA

16.10.4 Compagnie de Saint-Gobain SA PVC Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2021-2026)

16.12 Keshun Waterproof Technologies Co Ltd

16.12.1 Company Profile

16.12.2 Main Business and PVC Waterproofing Membrane Information

16.12.3 SWOT Analysis of Keshun Waterproof Technologies Co Ltd

16.12.4 Keshun Waterproof Technologies Co Ltd PVC Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2021-2026)

16.13 Shenzhen Joaboa Technology Co Ltd

16.13.1 Company Profile

16.13.2 Main Business and PVC Waterproofing Membrane Information

16.13.3 SWOT Analysis of Shenzhen Joaboa Technology Co Ltd

16.13.4 Shenzhen Joaboa Technology Co Ltd PVC Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2021-2026)

16.14 Hongyuan Waterproof Materials Co Ltd

16.14.1 Company Profile

16.14.2 Main Business and PVC Waterproofing Membrane Information

16.14.3 SWOT Analysis of Hongyuan Waterproof Materials Co Ltd

16.14.4 Hongyuan Waterproof Materials Co Ltd PVC Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2021-2026)

16.15 Weifang Yuhong Waterproofing Materials Co Ltd

16.15.1 Company Profile

16.15.2 Main Business and PVC Waterproofing Membrane Information

16.15.3 SWOT Analysis of Weifang Yuhong Waterproofing Materials Co Ltd

16.15.4 Weifang Yuhong Waterproofing Materials Co Ltd PVC Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2021-2026)

16.16 Liaoning Dayu Waterproof Material Group Co Ltd

16.16.1 Company Profile

16.16.2 Main Business and PVC Waterproofing Membrane Information

16.16.3 SWOT Analysis of Liaoning Dayu Waterproof Material Group Co Ltd

16.16.4 Liaoning Dayu Waterproof Material Group Co Ltd PVC Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2021-2026)

16.17 Jiangsu Canlon Building Materials Co Ltd

16.17.1 Company Profile

16.17.2 Main Business and PVC Waterproofing Membrane Information

16.17.3 SWOT Analysis of Jiangsu Canlon Building Materials Co Ltd

16.17.4 Jiangsu Canlon Building Materials Co Ltd PVC Waterproofing Membrane
Sales, Revenue, Price and Gross Margin (2021-2026)

Please ask for sample pages for full companies list

Tables & Figures

TABLES AND FIGURES

Table Abbreviation and Acronyms List

Table Research Scope of PVC Waterproofing Membrane Report

Table Data Sources of PVC Waterproofing Membrane Report

Table Major Assumptions of PVC Waterproofing Membrane Report

Figure Market Size Estimated Method

Figure Major Forecasting Factors

Figure PVC Waterproofing Membrane Picture

Table PVC Waterproofing Membrane Classification

Table PVC Waterproofing Membrane Applications List

Table Drivers of PVC Waterproofing Membrane Market

Table Restraints of PVC Waterproofing Membrane Market

Table Opportunities of PVC Waterproofing Membrane Market

Table Threats of PVC Waterproofing Membrane Market

Table Raw Materials Suppliers List

Table Different Production Methods of PVC Waterproofing Membrane

Table Cost Structure Analysis of PVC Waterproofing Membrane

Table Key End Users List

Table Latest News of PVC Waterproofing Membrane Market

Table Merger and Acquisition List

Table Planned/Future Project of PVC Waterproofing Membrane Market

Table Policy of PVC Waterproofing Membrane Market

Table 2021-2031 Regional Export of PVC Waterproofing Membrane

Table 2021-2031 Regional Import of PVC Waterproofing Membrane

Table 2021-2031 Regional Trade Balance

Figure 2021-2031 Regional Trade Balance

Table 2021-2031 North America PVC Waterproofing Membrane Market Size and Market Volume List

Figure 2021-2031 North America PVC Waterproofing Membrane Market Size and CAGR

Figure 2021-2031 North America PVC Waterproofing Membrane Market Volume and CAGR

Table 2021-2031 North America PVC Waterproofing Membrane Demand List by Application

Table 2021-2026 North America PVC Waterproofing Membrane Key Players Sales List

Table 2021-2026 North America PVC Waterproofing Membrane Key Players Market

Share List

Table 2021-2031 North America PVC Waterproofing Membrane Demand List by Type

Table 2021-2026 North America PVC Waterproofing Membrane Price List by Type

Table 2021-2031 United States PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 United States PVC Waterproofing Membrane Import & Export List

Table 2021-2031 Canada PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 Canada PVC Waterproofing Membrane Import & Export List

Table 2021-2031 Mexico PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 Mexico PVC Waterproofing Membrane Import & Export List

Table 2021-2031 South America PVC Waterproofing Membrane Market Size and Market Volume List

Figure 2021-2031 South America PVC Waterproofing Membrane Market Size and CAGR

Figure 2021-2031 South America PVC Waterproofing Membrane Market Volume and CAGR

Table 2021-2031 South America PVC Waterproofing Membrane Demand List by Application

Table 2021-2026 South America PVC Waterproofing Membrane Key Players Sales List

Table 2021-2026 South America PVC Waterproofing Membrane Key Players Market Share List

Table 2021-2031 South America PVC Waterproofing Membrane Demand List by Type

Table 2021-2026 South America PVC Waterproofing Membrane Price List by Type

Table 2021-2031 Brazil PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 Brazil PVC Waterproofing Membrane Import & Export List

Table 2021-2031 Argentina PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 Argentina PVC Waterproofing Membrane Import & Export List

Table 2021-2031 Chile PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 Chile PVC Waterproofing Membrane Import & Export List

Table 2021-2031 Peru PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 Peru PVC Waterproofing Membrane Import & Export List

Table 2021-2031 Asia & Pacific PVC Waterproofing Membrane Market Size and Market Volume List

Figure 2021-2031 Asia & Pacific PVC Waterproofing Membrane Market Size and CAGR

Figure 2021-2031 Asia & Pacific PVC Waterproofing Membrane Market Volume and CAGR

Table 2021-2031 Asia & Pacific PVC Waterproofing Membrane Demand List by Application

Table 2021-2026 Asia & Pacific PVC Waterproofing Membrane Key Players Sales List

Table 2021-2026 Asia & Pacific PVC Waterproofing Membrane Key Players Market Share List

Table 2021-2031 Asia & Pacific PVC Waterproofing Membrane Demand List by Type

Table 2021-2026 Asia & Pacific PVC Waterproofing Membrane Price List by Type

Table 2021-2031 China PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 China PVC Waterproofing Membrane Import & Export List

Table 2021-2031 India PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 India PVC Waterproofing Membrane Import & Export List

Table 2021-2031 Japan PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 Japan PVC Waterproofing Membrane Import & Export List

Table 2021-2031 South Korea PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 South Korea PVC Waterproofing Membrane Import & Export List

Table 2021-2031 Southeast Asia PVC Waterproofing Membrane Market Size List

Table 2021-2031 Southeast Asia PVC Waterproofing Membrane Market Volume List

Table 2021-2031 Southeast Asia PVC Waterproofing Membrane Import List

Table 2021-2031 Southeast Asia PVC Waterproofing Membrane Export List

Table 2021-2031 Australia & New Zealand PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 Australia & New Zealand PVC Waterproofing Membrane Import & Export List

Table 2021-2031 Europe PVC Waterproofing Membrane Market Size and Market Volume List

Figure 2021-2031 Europe PVC Waterproofing Membrane Market Size and CAGR

Figure 2021-2031 Europe PVC Waterproofing Membrane Market Volume and CAGR

Table 2021-2031 Europe PVC Waterproofing Membrane Demand List by Application

Table 2021-2026 Europe PVC Waterproofing Membrane Key Players Sales List

Table 2021-2026 Europe PVC Waterproofing Membrane Key Players Market Share List

Table 2021-2031 Europe PVC Waterproofing Membrane Demand List by Type

Table 2021-2026 Europe PVC Waterproofing Membrane Price List by Type

Table 2021-2031 Germany PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 Germany PVC Waterproofing Membrane Import & Export List

Table 2021-2031 France PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 France PVC Waterproofing Membrane Import & Export List

Table 2021-2031 United Kingdom PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 United Kingdom PVC Waterproofing Membrane Import & Export List

Table 2021-2031 Italy PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 Italy PVC Waterproofing Membrane Import & Export List

Table 2021-2031 Spain PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 Spain PVC Waterproofing Membrane Import & Export List

Table 2021-2031 Belgium PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 Belgium PVC Waterproofing Membrane Import & Export List

Table 2021-2031 Netherlands PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 Netherlands PVC Waterproofing Membrane Import & Export List

Table 2021-2031 Austria PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 Austria PVC Waterproofing Membrane Import & Export List

Table 2021-2031 Poland PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 Poland PVC Waterproofing Membrane Import & Export List

Table 2021-2031 North Europe PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 North Europe PVC Waterproofing Membrane Import & Export List

Table 2021-2031 MEA PVC Waterproofing Membrane Market Size and Market Volume List

Figure 2021-2031 MEA PVC Waterproofing Membrane Market Size and CAGR

Figure 2021-2031 MEA PVC Waterproofing Membrane Market Volume and CAGR

Table 2021-2031 MEA PVC Waterproofing Membrane Demand List by Application

Table 2021-2026 MEA PVC Waterproofing Membrane Key Players Sales List

Table 2021-2026 MEA PVC Waterproofing Membrane Key Players Market Share List

Table 2021-2031 MEA PVC Waterproofing Membrane Demand List by Type

Table 2021-2026 MEA PVC Waterproofing Membrane Price List by Type

Table 2021-2031 Egypt PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 Egypt PVC Waterproofing Membrane Import & Export List

Table 2021-2031 Israel PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 Israel PVC Waterproofing Membrane Import & Export List

Table 2021-2031 South Africa PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 South Africa PVC Waterproofing Membrane Import & Export List

Table 2021-2031 Gulf Cooperation Council Countries PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 Gulf Cooperation Council Countries PVC Waterproofing Membrane Import & Export List

Table 2021-2031 Turkey PVC Waterproofing Membrane Market Size and Market Volume List

Table 2021-2031 Turkey PVC Waterproofing Membrane Import & Export List

Table 2021-2026 Global PVC Waterproofing Membrane Market Size List by Region

Table 2021-2026 Global PVC Waterproofing Membrane Market Size Share List by Region

Table 2021-2026 Global PVC Waterproofing Membrane Market Volume List by Region

Table 2021-2026 Global PVC Waterproofing Membrane Market Volume Share List by Region

Table 2021-2026 Global PVC Waterproofing Membrane Demand List by Application

Table 2021-2026 Global PVC Waterproofing Membrane Demand Market Share List by Application

Table 2021-2026 Global PVC Waterproofing Membrane Capacity List

Table 2021-2026 Global PVC Waterproofing Membrane Key Vendors Capacity Share List

Table 2021-2026 Global PVC Waterproofing Membrane Key Vendors Production List

Table 2021-2026 Global PVC Waterproofing Membrane Key Vendors Production Share List

Figure 2021-2026 Global PVC Waterproofing Membrane Capacity Production and Growth Rate

Table 2021-2026 Global PVC Waterproofing Membrane Key Vendors Production Value List

Figure 2021-2026 Global PVC Waterproofing Membrane Production Value and Growth Rate

Table 2021-2026 Global PVC Waterproofing Membrane Key Vendors Production Value Share List

Table 2021-2026 Global PVC Waterproofing Membrane Demand List by Type	
Table 2021-2026 Global PVC Waterproofing Membrane Demand Market Share List by Type	
Table 2021-2026 Regional PVC Waterproofing Membrane Price List	
Table 2026-2031 Global PVC Waterproofing Membrane Market Size List by Region	
Table 2026-2031 Global PVC Waterproofing Membrane Market Size Share List by Region	
Table 2026-2031 Global PVC Waterproofing Membrane Market Volume List by Region	
Table 2026-2031 Global PVC Waterproofing Membrane Market Volume Share List by Region	
Table 2026-2031 Global PVC Waterproofing Membrane Demand List by Application	
Table 2026-2031 Global PVC Waterproofing Membrane Demand Market Share List by Application	
Table 2026-2031 Global PVC Waterproofing Membrane Capacity List	
Table 2026-2031 Global PVC Waterproofing Membrane Key Vendors Capacity Share List	
Table 2026-2031 Global PVC Waterproofing Membrane Key Vendors Production List	
Table 2026-2031 Global PVC Waterproofing Membrane Key Vendors Production Share List	
Figure 2026-2031 Global PVC Waterproofing Membrane Capacity Production and Growth Rate	
Table 2026-2031 Global PVC Waterproofing Membrane Key Vendors Production Value List	
Figure 2026-2031 Global PVC Waterproofing Membrane Production Value and Growth Rate	
Table 2026-2031 Global PVC Waterproofing Membrane Key Vendors Production Value Share List	
Table 2026-2031 Global PVC Waterproofing Membrane Demand List by Type	
Table 2026-2031 Global PVC Waterproofing Membrane Demand Market Share List by Type	
Table 2026-2031 PVC Waterproofing Membrane Regional Price List	
Table Sika AG Information	
Table SWOT Analysis of Sika AG	
Table 2021-2026 Sika AG PVC Waterproofing Membrane Product Capacity Production Price Cost Production Value	
Figure 2021-2026 Sika AG PVC Waterproofing Membrane Capacity Production and Growth Rate	
Figure 2021-2026 Sika AG PVC Waterproofing Membrane Market Share	
Table Carlisle Construction Materials LLC Information	

Table SWOT Analysis of Carlisle Construction Materials LLC

Table 2021-2026 Carlisle Construction Materials LLC PVC Waterproofing Membrane Product Capacity Production Price Cost Production Value

Figure 2021-2026 Carlisle Construction Materials LLC PVC Waterproofing Membrane Capacity Production and Growth Rate

Figure 2021-2026 Carlisle Construction Materials LLC PVC Waterproofing Membrane Market Share

Table Fosroc International Ltd Information

Table SWOT Analysis of Fosroc International Ltd

Table 2021-2026 Fosroc International Ltd PVC Waterproofing Membrane Product Capacity Production Price Cost Production Value

Figure 2021-2026 Fosroc International Ltd PVC Waterproofing Membrane Capacity Production and Growth Rate

Figure 2021-2026 Fosroc International Ltd PVC Waterproofing Membrane Market Share

Table Soprema Group Information

Table SWOT Analysis of Soprema Group

Table 2021-2026 Soprema Group PVC Waterproofing Membrane Product Capacity Production Price Cost Production Value

Figure 2021-2026 Soprema Group PVC Waterproofing Membrane Capacity Production and Growth Rate

Figure 2021-2026 Soprema Group PVC Waterproofing Membrane Market Share

Table GAF Materials LLC Information

Table SWOT Analysis of GAF Materials LLC

Table 2021-2026 GAF Materials LLC PVC Waterproofing Membrane Product Capacity Production Price Cost Production Value

Figure 2021-2026 GAF Materials LLC PVC Waterproofing Membrane Capacity Production and Growth Rate

Figure 2021-2026 GAF Materials LLC PVC Waterproofing Membrane Market Share

Table Holcim Ltd Information

Table SWOT Analysis of Holcim Ltd

Table 2021-2026 Holcim Ltd PVC Waterproofing Membrane Product Capacity Production Price Cost Production Value

Figure 2021-2026 Holcim Ltd PVC Waterproofing Membrane Capacity Production and Growth Rate

Figure 2021-2026 Holcim Ltd PVC Waterproofing Membrane Market Share

Table BMI Group Information

Table SWOT Analysis of BMI Group

Table 2021-2026 BMI Group PVC Waterproofing Membrane Product Capacity Production Price Cost Production Value

Figure 2021-2026 BMI Group PVC Waterproofing Membrane Capacity Production and Growth Rate

Figure 2021-2026 BMI Group PVC Waterproofing Membrane Market Share

Table Johns Manville Corporation Information

Table SWOT Analysis of Johns Manville Corporation

Table 2021-2026 Johns Manville Corporation PVC Waterproofing Membrane Product Capacity Production Price Cost Production Value

Figure 2021-2026 Johns Manville Corporation PVC Waterproofing Membrane Capacity Production and Growth Rate

Figure 2021-2026 Johns Manville Corporation PVC Waterproofing Membrane Market Share

Table MAPEI SpA Information

Table SWOT Analysis of MAPEI SpA

Table 2021-2026 MAPEI SpA PVC Waterproofing Membrane Product Capacity Production Price Cost Production Value

Figure 2021-2026 MAPEI SpA PVC Waterproofing Membrane Capacity Production and Growth Rate

Figure 2021-2026 MAPEI SpA PVC Waterproofing Membrane Market Share

Table Compagnie de Saint-Gobain SA Information

Table SWOT Analysis of Compagnie de Saint-Gobain SA

Table 2021-2026 Compagnie de Saint-Gobain SA PVC Waterproofing Membrane Product Capacity Production Price Cost Production Value

Figure 2021-2026 Compagnie de Saint-Gobain SA PVC Waterproofing Membrane Capacity Production and Growth Rate

Figure 2021-2026 Compagnie de Saint-Gobain SA PVC Waterproofing Membrane Market Share

Table Beijing Oriental Yuhong Waterproof Technology Co Ltd Information

Table SWOT Analysis of Beijing Oriental Yuhong Waterproof Technology Co Ltd

Table 2021-2026 Beijing Oriental Yuhong Waterproof Technology Co Ltd PVC Waterproofing Membrane Product Capacity Production Price Cost Production Value

Figure 2021-2026 Beijing Oriental Yuhong Waterproof Technology Co Ltd PVC Waterproofing Membrane Capacity Production and Growth Rate

Figure 2021-2026 Beijing Oriental Yuhong Waterproof Technology Co Ltd PVC Waterproofing Membrane Market Share

Table Keshun Waterproof Technologies Co Ltd Information

Table SWOT Analysis of Keshun Waterproof Technologies Co Ltd

Table 2021-2026 Keshun Waterproof Technologies Co Ltd PVC Waterproofing Membrane Product Capacity Production Price Cost Production Value

Figure 2021-2026 Keshun Waterproof Technologies Co Ltd PVC Waterproofing

Membrane Capacity Production and Growth Rate

Figure 2021-2026 Keshun Waterproof Technologies Co Ltd PVC Waterproofing Membrane Market Share

Table Shenzhen Joaboa Technology Co Ltd Information

Table SWOT Analysis of Shenzhen Joaboa Technology Co Ltd

Table 2021-2026 Shenzhen Joaboa Technology Co Ltd PVC Waterproofing Membrane Product Capacity Production Price Cost Production Value

Figure 2021-2026 Shenzhen Joaboa Technology Co Ltd PVC Waterproofing Membrane Capacity Production and Growth Rate

Figure 2021-2026 Shenzhen Joaboa Technology Co Ltd PVC Waterproofing Membrane Market Share

Table Hongyuan Waterproof Materials Co Ltd Information

Table SWOT Analysis of Hongyuan Waterproof Materials Co Ltd

Table 2021-2026 Hongyuan Waterproof Materials Co Ltd PVC Waterproofing Membrane Product Capacity Production Price Cost Production Value

Figure 2021-2026 Hongyuan Waterproof Materials Co Ltd PVC Waterproofing Membrane Capacity Production and Growth Rate

Figure 2021-2026 Hongyuan Waterproof Materials Co Ltd PVC Waterproofing Membrane Market Share

Table Weifang Yuhong Waterproofing Materials Co Ltd Information

Table SWOT Analysis of Weifang Yuhong Waterproofing Materials Co Ltd

Table 2021-2026 Weifang Yuhong Waterproofing Materials Co Ltd PVC Waterproofing Membrane Product Capacity Production Price Cost Production Value

Figure 2021-2026 Weifang Yuhong Waterproofing Materials Co Ltd PVC Waterproofing Membrane Capacity Production and Growth Rate

Figure 2021-2026 Weifang Yuhong Waterproofing Materials Co Ltd PVC Waterproofing Membrane Market Share

Table Liaoning Dayu Waterproof Material Group Co Ltd Information

Table SWOT Analysis of Liaoning Dayu Waterproof Material Group Co Ltd

Table 2021-2026 Liaoning Dayu Waterproof Material Group Co Ltd PVC Waterproofing Membrane Product Capacity Production Price Cost Production Value

Figure 2021-2026 Liaoning Dayu Waterproof Material Group Co Ltd PVC Waterproofing Membrane Capacity Production and Growth Rate

Figure 2021-2026 Liaoning Dayu Waterproof Material Group Co Ltd PVC Waterproofing Membrane Market Share

Table Jiangsu Canlon Building Materials Co Ltd Information

Table SWOT Analysis of Jiangsu Canlon Building Materials Co Ltd

Table 2021-2026 Jiangsu Canlon Building Materials Co Ltd PVC Waterproofing Membrane Product Capacity Production Price Cost Production Value

Figure 2021-2026 Jiangsu Canlon Building Materials Co Ltd PVC Waterproofing Membrane Capacity Production and Growth Rate

Figure 2021-2026 Jiangsu Canlon Building Materials Co Ltd PVC Waterproofing Membrane Market Share

Table Beijing New Building Materials Public Company Limited Information

Table SWOT Analysis of Beijing New Building Materials Public Company Limited

Table 2021-2026 Beijing New Building Materials Public Company Limited PVC Waterproofing Membrane Product Capacity Production Price Cost Production Value

Figure 2021-2026 Beijing New Building Materials Public Company Limited PVC Waterproofing Membrane Capacity Production and Growth Rate

Figure 2021-2026 Beijing New Building Materials Public Company Limited PVC Waterproofing Membrane Market Share

Table Yuzhongqing Waterproof Technology Group Co Ltd Information

Table SWOT Analysis of Yuzhongqing Waterproof Technology Group Co Ltd

Table 2021-2026 Yuzhongqing Waterproof Technology Group Co Ltd PVC Waterproofing Membrane Product Capacity Production Price Cost Production Value

Figure 2021-2026 Yuzhongqing Waterproof Technology Group Co Ltd PVC Waterproofing Membrane Capacity Production and Growth Rate

Figure 2021-2026 Yuzhongqing Waterproof Technology Group Co Ltd PVC Waterproofing Membrane Market Share

Table Shandong Yinhe Waterproof Materials Co Ltd Information

Table SWOT Analysis of Shandong Yinhe Waterproof Materials Co Ltd

Table 2021-2026 Shandong Yinhe Waterproof Materials Co Ltd PVC Waterproofing Membrane Product Capacity Production Price Cost Production Value

Figure 2021-2026 Shandong Yinhe Waterproof Materials Co Ltd PVC Waterproofing Membrane Capacity Production and Growth Rate

Figure 2021-2026 Shandong Yinhe Waterproof Materials Co Ltd PVC Waterproofing Membrane Market Share

Table SKSHU Paint Co Ltd (3Trees) Information

Table SWOT Analysis of SKSHU Paint Co Ltd (3Trees)

Table 2021-2026 SKSHU Paint Co Ltd (3Trees) PVC Waterproofing Membrane Product Capacity Production Price Cost Production Value

Figure 2021-2026 SKSHU Paint Co Ltd (3Trees) PVC Waterproofing Membrane Capacity Production and Growth Rate

Figure 2021-2026 SKSHU Paint Co Ltd (3Trees) PVC Waterproofing Membrane Market Share

Table Renolit SE Information

Table SWOT Analysis of Renolit SE

Table 2021-2026 Renolit SE PVC Waterproofing Membrane Product Capacity

Production Price Cost Production Value

Figure 2021-2026 Renolit SE PVC Waterproofing Membrane Capacity Production and Growth Rate

Figure 2021-2026 Renolit SE PVC Waterproofing Membrane Market Share

Table Protan AS Information

Table SWOT Analysis of Protan AS

Table 2021-2026 Protan AS PVC Waterproofing Membrane Product Capacity

Production Price Cost Production Value

Figure 2021-2026 Protan AS PVC Waterproofing Membrane Capacity Production and Growth Rate

Figure 2021-2026 Protan AS PVC Waterproofing Membrane Market Share

Table TechnoNICOL Corporation Information

Table SWOT Analysis of TechnoNICOL Corporation

Table 2021-2026 TechnoNICOL Corporation PVC Waterproofing Membrane Product Capacity Production Price Cost Production Value

Figure 2021-2026 TechnoNICOL Corporation PVC Waterproofing Membrane Capacity Production and Growth Rate

Figure 2021-2026 TechnoNICOL Corporation PVC Waterproofing Membrane Market Share

Table Danosa Information

Table SWOT Analysis of Danosa

Table 2021-2026 Danosa PVC Waterproofing Membrane Product Capacity Production Price Cost Production Value

Figure 2021-2026 Danosa PVC Waterproofing Membrane Capacity Production and Growth Rate

Figure 2021-2026 Danosa PVC Waterproofing Membrane Market Share

Table Paul Bauder GmbH & Co KG Information

Table SWOT Analysis of Paul Bauder GmbH & Co KG

Table 2021-2026 Paul Bauder GmbH & Co KG PVC Waterproofing Membrane Product Capacity Production Price Cost Production Value

Figure 2021-2026 Paul Bauder GmbH & Co KG PVC Waterproofing Membrane Capacity Production and Growth Rate

Figure 2021-2026 Paul Bauder GmbH & Co KG PVC Waterproofing Membrane Market Share

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