

Waterproofing Membrane Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application, Product Type

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Abstracts

Waterproofing Membrane Market Summary

Introduction

Waterproofing Membranes are materials applied to surfaces to prevent water ingress, used in infrastructure, commercial, and residential applications. These membranes ensure structural integrity and durability, critical for construction and maintenance. The market is characterized by its role in sustainable building, driven by urbanization, infrastructure development, and environmental regulations. Trends include eco-friendly membranes, self-healing technologies, and liquid-applied solutions, with growing demand in emerging markets due to rapid construction growth.

Market Size and Growth Forecast

The global Waterproofing Membrane market was valued at USD 19.1–22.3 billion in 2024, with an estimated CAGR of 5.5%–7.5% from 2025 to 2030, propelled by construction and sustainability trends.

Regional Analysis

North America grows at 5.0%–7.0%; the U.S. leads due to infrastructure upgrades, with trends focusing on eco-friendly membranes.

Europe achieves 5.3%–7.3% growth; Germany and the UK drive demand through green building standards, emphasizing self-healing technologies.

Asia Pacific records 6.0%–8.0% growth; China and India are key markets, with trends toward liquid-applied membranes.

Rest of the World grows at 4.8%–6.8%; Brazil and the UAE show potential, with trends centering on infrastructure projects.

Application Analysis

Infrastructure expands at 5.8%–7.8%; it supports bridges and tunnels, with trends favoring durable membranes.

Commercial grows at 5.5%–7.5%; it drives office and retail construction, emphasizing eco-friendly solutions.

Residential rises at 5.0%–7.0%; it supports housing projects, with trends focusing on cost-effective membranes.

Type Analysis

Bitumen Membrane expands at 5.3%–7.3%; it offers durability, with trends favoring sustainable formulations.

Polymeric Membrane grows at 5.5%–7.5%; it provides flexibility, emphasizing self-healing properties.

Liquid Membrane rises at 6.0%–8.0%; it ensures seamless application, with trends focusing on eco-friendly options.

Key Market Players

Beijing Oriental Yuhong, based in Beijing, China, is a leader in waterproofing membranes, known for large-scale production. Yuhong is developing eco-friendly membranes and targeting Southeast Asia.

Sika, headquartered in Baar, Switzerland, offers polymeric membranes, emphasizing innovation. Sika is integrating self-healing technologies and targeting North America.

Soprema, from Strasbourg, France, provides bitumen membranes, focusing on

durability. Soprema is expanding in Latin America.

Carlisle Companies, based in Scottsdale, Arizona, USA, supplies liquid membranes, known for reliability. Carlisle is targeting Europe with sustainable solutions.

Johns Manville, from Denver, Colorado, USA, offers commercial membranes, emphasizing eco-friendliness. Johns Manville is expanding in India.

CKS, headquartered in Shanghai, China, provides residential membranes, focusing on affordability. CKS is targeting Africa.

BNBM, based in Beijing, China, supplies infrastructure membranes, known for scalability. BNBM is developing liquid membranes and targeting the Middle East.

Standard Industries, from New York, USA, offers polymeric membranes, emphasizing innovation. Standard is expanding in Europe.

Holcim Elevate, headquartered in Zug, Switzerland, provides bitumen membranes, focusing on sustainability. Holcim is targeting Asia.

Mapei, based in Milan, Italy, supplies liquid membranes, known for precision. Mapei is expanding in North America.

Porter's Five Forces Analysis

The threat of new entrants is moderate; high capital and expertise deter entry, but construction demand attracts niche players.

The threat of substitutes is low; alternative waterproofing methods lack membranes' durability and versatility.

Buyer power is moderate; contractors demand quality, but large projects negotiate pricing.

Supplier power is low; raw materials like bitumen are widely available, reducing supplier leverage.

Competitive rivalry is high; firms differentiate through eco-friendly designs, self-healing technologies, and affordability.

Market Opportunities and Challenges

Opportunities

Urbanization and infrastructure development drive membrane demand.

Eco-friendly and self-healing membranes align with sustainability trends, boosting growth.

Emerging markets offer expansion as construction grows in Asia and Africa.

Challenges

High costs of advanced membranes limit adoption in low-budget projects.

Regulatory variations across regions increase compliance costs.

Intense competition pressures pricing for branded membranes.

Growth Trend Analysis

The Waterproofing Membrane market is growing steadily, driven by construction and sustainability trends. Kingspan Group's increased ownership in Nordic Waterproofing to 62.6% on October 21, 2024, strengthens its market position. Mapei's acquisition of a UK waterproofing specialist on October 7, 2024, enhances its portfolio. Beijing Oriental Yuhong's production capacity of over 1.5 billion square meters supports robust supply, aligning with a projected CAGR of 5.5%–7.5% through 2030.

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 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 Waterproofing Membrane by Region
- 8.2 Import of Waterproofing Membrane by Region
- 8.3 Balance of Trade

CHAPTER 9 HISTORICAL AND FORECAST WATERPROOFING MEMBRANE MARKET IN NORTH AMERICA (2020-2030)

- 9.1 Waterproofing Membrane Market Size
- 9.2 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 WATERPROOFING MEMBRANE MARKET IN SOUTH AMERICA (2020-2030)

- 10.1 Waterproofing Membrane Market Size
- 10.2 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 WATERPROOFING MEMBRANE MARKET IN ASIA & PACIFIC (2020-2030)

- 11.1 Waterproofing Membrane Market Size
- 11.2 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

CHAPTER 12 HISTORICAL AND FORECAST WATERPROOFING MEMBRANE MARKET IN EUROPE (2020-2030)

- 12.1 Waterproofing Membrane Market Size
- 12.2 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 Russia

CHAPTER 13 HISTORICAL AND FORECAST WATERPROOFING MEMBRANE MARKET IN MEA (2020-2030)

- 13.1 Waterproofing Membrane Market Size
- 13.2 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 WATERPROOFING MEMBRANE MARKET (2020-2025)

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

CHAPTER 15 GLOBAL WATERPROOFING MEMBRANE MARKET FORECAST (2025-2030)

- 15.1 Waterproofing Membrane Market Size Forecast
- 15.2 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 Beijing Oriental Yuhong
 - 16.1.1 Company Profile
 - 16.1.2 Main Business and Waterproofing Membrane Information
 - 16.1.3 SWOT Analysis of Beijing Oriental Yuhong
 - 16.1.4 Beijing Oriental Yuhong Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.2 Sika
 - 16.2.1 Company Profile
 - 16.2.2 Main Business and Waterproofing Membrane Information
 - 16.2.3 SWOT Analysis of Sika
 - 16.2.4 Sika Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.3 Soprema
 - 16.3.1 Company Profile
 - 16.3.2 Main Business and Waterproofing Membrane Information

- 16.3.3 SWOT Analysis of Soprema
- 16.3.4 Soprema Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.4 Carlisle Companies
 - 16.4.1 Company Profile
 - 16.4.2 Main Business and Waterproofing Membrane Information
 - 16.4.3 SWOT Analysis of Carlisle Companies
 - 16.4.4 Carlisle Companies Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.5 Johns Manville
 - 16.5.1 Company Profile
 - 16.5.2 Main Business and Waterproofing Membrane Information
 - 16.5.3 SWOT Analysis of Johns Manville
 - 16.5.4 Johns Manville Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.6 CKS
 - 16.6.1 Company Profile
 - 16.6.2 Main Business and Waterproofing Membrane Information
 - 16.6.3 SWOT Analysis of CKS
 - 16.6.4 CKS Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.7 BNBM
 - 16.7.1 Company Profile
 - 16.7.2 Main Business and Waterproofing Membrane Information
 - 16.7.3 SWOT Analysis of BNBM
 - 16.7.4 BNBM Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.8 Standard Industries
 - 16.8.1 Company Profile
 - 16.8.2 Main Business and Waterproofing Membrane Information
 - 16.8.3 SWOT Analysis of Standard Industries
 - 16.8.4 Standard Industries Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.9 Holcim Elevate
 - 16.9.1 Company Profile
 - 16.9.2 Main Business and Waterproofing Membrane Information
 - 16.9.3 SWOT Analysis of Holcim Elevate
 - 16.9.4 Holcim Elevate Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2020-2025)

16.10 RPM International

16.10.1 Company Profile

16.10.2 Main Business and Waterproofing Membrane Information

16.10.3 SWOT Analysis of RPM International

16.10.4 RPM International Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2020-2025)

16.11 Hongyuan

16.11.1 Company Profile

16.11.2 Main Business and Waterproofing Membrane Information

16.11.3 SWOT Analysis of Hongyuan

16.11.4 Hongyuan Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2020-2025)

16.12 Dayu Group

16.12.1 Company Profile

16.12.2 Main Business and Waterproofing Membrane Information

16.12.3 SWOT Analysis of Dayu Group

16.12.4 Dayu Group Waterproofing Membrane Sales, Revenue, Price and Gross Margin (2020-2025)

Please ask for sample pages for full companies list

Tables and Figures

Table Abbreviation and Acronyms List

Table Research Scope of Waterproofing Membrane Report

Table Data Sources of Waterproofing Membrane Report

Table Major Assumptions of Waterproofing Membrane Report

Figure Market Size Estimated Method

Figure Major Forecasting Factors

Figure Waterproofing Membrane Picture

Table Waterproofing Membrane Classification

Table Waterproofing Membrane Applications List

Table Drivers of Waterproofing Membrane Market

Table Restraints of Waterproofing Membrane Market

Table Opportunities of Waterproofing Membrane Market

Table Threats of Waterproofing Membrane Market

Table Covid-19 Impact For Waterproofing Membrane Market

Table Raw Materials Suppliers List

Table Different Production Methods of Waterproofing Membrane

Table Cost Structure Analysis of Waterproofing Membrane

Table Key End Users List

Table Latest News of Waterproofing Membrane Market

Table Merger and Acquisition List

Table Planned/Future Project of Waterproofing Membrane Market

Table Policy of Waterproofing Membrane Market

Table 2020-2030 Regional Export of Waterproofing Membrane

Table 2020-2030 Regional Import of Waterproofing Membrane

Table 2020-2030 Regional Trade Balance

Figure 2020-2030 Regional Trade Balance

Table 2020-2030 North America Waterproofing Membrane Market Size and Market Volume List

Figure 2020-2030 North America Waterproofing Membrane Market Size and CAGR

Figure 2020-2030 North America Waterproofing Membrane Market Volume and CAGR

Table 2020-2030 North America Waterproofing Membrane Demand List by Application

Table 2020-2025 North America Waterproofing Membrane Key Players Sales List

Table 2020-2025 North America Waterproofing Membrane Key Players Market Share List

Table 2020-2030 North America Waterproofing Membrane Demand List by Type

Table 2020-2025 North America Waterproofing Membrane Price List by Type

Table 2020-2030 United States Waterproofing Membrane Market Size and Market Volume List

Table 2020-2030 United States Waterproofing Membrane Import & Export List

Table 2020-2030 Canada Waterproofing Membrane Market Size and Market Volume List

Table 2020-2030 Canada Waterproofing Membrane Import & Export List

Table 2020-2030 Mexico Waterproofing Membrane Market Size and Market Volume List

Table 2020-2030 Mexico Waterproofing Membrane Import & Export List

Table 2020-2030 South America Waterproofing Membrane Market Size and Market Volume List

Figure 2020-2030 South America Waterproofing Membrane Market Size and CAGR

Figure 2020-2030 South America Waterproofing Membrane Market Volume and CAGR

Table 2020-2030 South America Waterproofing Membrane Demand List by Application

Table 2020-2025 South America Waterproofing Membrane Key Players Sales List

Table 2020-2025 South America Waterproofing Membrane Key Players Market Share List

Table 2020-2030 South America Waterproofing Membrane Demand List by Type

Table 2020-2025 South America Waterproofing Membrane Price List by Type

Table 2020-2030 Brazil Waterproofing Membrane Market Size and Market Volume List

Table 2020-2030 Brazil Waterproofing Membrane Import & Export List

Table 2020-2030 Argentina Waterproofing Membrane Market Size and Market Volume List

- Table 2020-2030 Argentina Waterproofing Membrane Import & Export List
- Table 2020-2030 Chile Waterproofing Membrane Market Size and Market Volume List
- Table 2020-2030 Chile Waterproofing Membrane Import & Export List
- Table 2020-2030 Peru Waterproofing Membrane Market Size and Market Volume List
- Table 2020-2030 Peru Waterproofing Membrane Import & Export List
- Table 2020-2030 Asia & Pacific Waterproofing Membrane Market Size and Market Volume List
- Figure 2020-2030 Asia & Pacific Waterproofing Membrane Market Size and CAGR
- Figure 2020-2030 Asia & Pacific Waterproofing Membrane Market Volume and CAGR
- Table 2020-2030 Asia & Pacific Waterproofing Membrane Demand List by Application
- Table 2020-2025 Asia & Pacific Waterproofing Membrane Key Players Sales List
- Table 2020-2025 Asia & Pacific Waterproofing Membrane Key Players Market Share List
- Table 2020-2030 Asia & Pacific Waterproofing Membrane Demand List by Type
- Table 2020-2025 Asia & Pacific Waterproofing Membrane Price List by Type
- Table 2020-2030 China Waterproofing Membrane Market Size and Market Volume List
- Table 2020-2030 China Waterproofing Membrane Import & Export List
- Table 2020-2030 India Waterproofing Membrane Market Size and Market Volume List
- Table 2020-2030 India Waterproofing Membrane Import & Export List
- Table 2020-2030 Japan Waterproofing Membrane Market Size and Market Volume List
- Table 2020-2030 Japan Waterproofing Membrane Import & Export List
- Table 2020-2030 South Korea Waterproofing Membrane Market Size and Market Volume List
- Table 2020-2030 South Korea Waterproofing Membrane Import & Export List
- Table 2020-2030 Southeast Asia Waterproofing Membrane Market Size List
- Table 2020-2030 Southeast Asia Waterproofing Membrane Market Volume List
- Table 2020-2030 Southeast Asia Waterproofing Membrane Import List
- Table 2020-2030 Southeast Asia Waterproofing Membrane Export List
- Table 2020-2030 Australia Waterproofing Membrane Market Size and Market Volume List
- Table 2020-2030 Australia Waterproofing Membrane Import & Export List
- Table 2020-2030 Europe Waterproofing Membrane Market Size and Market Volume List
- Figure 2020-2030 Europe Waterproofing Membrane Market Size and CAGR
- Figure 2020-2030 Europe Waterproofing Membrane Market Volume and CAGR
- Table 2020-2030 Europe Waterproofing Membrane Demand List by Application
- Table 2020-2025 Europe Waterproofing Membrane Key Players Sales List
- Table 2020-2025 Europe Waterproofing Membrane Key Players Market Share List
- Table 2020-2030 Europe Waterproofing Membrane Demand List by Type

- Table 2020-2025 Europe Waterproofing Membrane Price List by Type
- Table 2020-2030 Germany Waterproofing Membrane Market Size and Market Volume List
- Table 2020-2030 Germany Waterproofing Membrane Import & Export List
- Table 2020-2030 France Waterproofing Membrane Market Size and Market Volume List
- Table 2020-2030 France Waterproofing Membrane Import & Export List
- Table 2020-2030 United Kingdom Waterproofing Membrane Market Size and Market Volume List
- Table 2020-2030 United Kingdom Waterproofing Membrane Import & Export List
- Table 2020-2030 Italy Waterproofing Membrane Market Size and Market Volume List
- Table 2020-2030 Italy Waterproofing Membrane Import & Export List
- Table 2020-2030 Spain Waterproofing Membrane Market Size and Market Volume List
- Table 2020-2030 Spain Waterproofing Membrane Import & Export List
- Table 2020-2030 Belgium Waterproofing Membrane Market Size and Market Volume List
- Table 2020-2030 Belgium Waterproofing Membrane Import & Export List
- Table 2020-2030 Netherlands Waterproofing Membrane Market Size and Market Volume List
- Table 2020-2030 Netherlands Waterproofing Membrane Import & Export List
- Table 2020-2030 Austria Waterproofing Membrane Market Size and Market Volume List
- Table 2020-2030 Austria Waterproofing Membrane Import & Export List
- Table 2020-2030 Poland Waterproofing Membrane Market Size and Market Volume List
- Table 2020-2030 Poland Waterproofing Membrane Import & Export List
- Table 2020-2030 Russia Waterproofing Membrane Market Size and Market Volume List
- Table 2020-2030 Russia Waterproofing Membrane Import & Export List
- Table 2020-2030 MEA Waterproofing Membrane Market Size and Market Volume List
- Figure 2020-2030 MEA Waterproofing Membrane Market Size and CAGR
- Figure 2020-2030 MEA Waterproofing Membrane Market Volume and CAGR
- Table 2020-2030 MEA Waterproofing Membrane Demand List by Application
- Table 2020-2025 MEA Waterproofing Membrane Key Players Sales List
- Table 2020-2025 MEA Waterproofing Membrane Key Players Market Share List
- Table 2020-2030 MEA Waterproofing Membrane Demand List by Type
- Table 2020-2025 MEA Waterproofing Membrane Price List by Type
- Table 2020-2030 Egypt Waterproofing Membrane Market Size and Market Volume List
- Table 2020-2030 Egypt Waterproofing Membrane Import & Export List
- Table 2020-2030 Israel Waterproofing Membrane Market Size and Market Volume List
- Table 2020-2030 Israel Waterproofing Membrane Import & Export List
- Table 2020-2030 South Africa Waterproofing Membrane Market Size and Market Volume List

- Table 2020-2030 South Africa Waterproofing Membrane Import & Export List
- Table 2020-2030 Gulf Cooperation Council Countries Waterproofing Membrane Market Size and Market Volume List
- Table 2020-2030 Gulf Cooperation Council Countries Waterproofing Membrane Import & Export List
- Table 2020-2030 Turkey Waterproofing Membrane Market Size and Market Volume List
- Table 2020-2030 Turkey Waterproofing Membrane Import & Export List
- Table 2020-2025 Global Waterproofing Membrane Market Size List by Region
- Table 2020-2025 Global Waterproofing Membrane Market Size Share List by Region
- Table 2020-2025 Global Waterproofing Membrane Market Volume List by Region
- Table 2020-2025 Global Waterproofing Membrane Market Volume Share List by Region
- Table 2020-2025 Global Waterproofing Membrane Demand List by Application
- Table 2020-2025 Global Waterproofing Membrane Demand Market Share List by Application
- Table 2020-2025 Global Waterproofing Membrane Key Vendors Sales List
- Table 2020-2025 Global Waterproofing Membrane Key Vendors Sales Share List
- Figure 2020-2025 Global Waterproofing Membrane Market Volume and Growth Rate
- Table 2020-2025 Global Waterproofing Membrane Key Vendors Revenue List
- Figure 2020-2025 Global Waterproofing Membrane Market Size and Growth Rate
- Table 2020-2025 Global Waterproofing Membrane Key Vendors Revenue Share List
- Table 2020-2025 Global Waterproofing Membrane Demand List by Type
- Table 2020-2025 Global Waterproofing Membrane Demand Market Share List by Type
- Table 2020-2025 Regional Waterproofing Membrane Price List
- Table 2025-2030 Global Waterproofing Membrane Market Size List by Region
- Table 2025-2030 Global Waterproofing Membrane Market Size Share List by Region
- Table 2025-2030 Global Waterproofing Membrane Market Volume List by Region
- Table 2025-2030 Global Waterproofing Membrane Market Volume Share List by Region
- Table 2025-2030 Global Waterproofing Membrane Demand List by Application
- Table 2025-2030 Global Waterproofing Membrane Demand Market Share List by Application
- Table 2025-2030 Global Waterproofing Membrane Key Vendors Sales List
- Table 2025-2030 Global Waterproofing Membrane Key Vendors Sales Share List
- Figure 2025-2030 Global Waterproofing Membrane Market Volume and Growth Rate
- Table 2025-2030 Global Waterproofing Membrane Key Vendors Revenue List
- Figure 2025-2030 Global Waterproofing Membrane Market Size and Growth Rate
- Table 2025-2030 Global Waterproofing Membrane Key Vendors Revenue Share List
- Table 2025-2030 Global Waterproofing Membrane Demand List by Type
- Table 2025-2030 Global Waterproofing Membrane Demand Market Share List by Type
- Table 2025-2030 Waterproofing Membrane Regional Price List

Table Beijing Oriental Yuhong Information

Table SWOT Analysis of Beijing Oriental Yuhong

Table 2020-2025 Beijing Oriental Yuhong Waterproofing Membrane Sale Volume Price Cost Revenue

Figure 2020-2025 Beijing Oriental Yuhong Waterproofing Membrane Sale Volume and Growth Rate

Figure 2020-2025 Beijing Oriental Yuhong Waterproofing Membrane Market Share

Table Sika Information

Table SWOT Analysis of Sika

Table 2020-2025 Sika Waterproofing Membrane Sale Volume Price Cost Revenue

Figure 2020-2025 Sika Waterproofing Membrane Sale Volume and Growth Rate

Figure 2020-2025 Sika Waterproofing Membrane Market Share

Table Soprema Information

Table SWOT Analysis of Soprema

Table 2020-2025 Soprema Waterproofing Membrane Sale Volume Price Cost Revenue

Figure 2020-2025 Soprema Waterproofing Membrane Sale Volume and Growth Rate

Figure 2020-2025 Soprema Waterproofing Membrane Market Share

Table Carlisle Companies Information

Table SWOT Analysis of Carlisle Companies

Table 2020-2025 Carlisle Companies Waterproofing Membrane Sale Volume Price Cost Revenue

Figure 2020-2025 Carlisle Companies Waterproofing Membrane Sale Volume and Growth Rate

Figure 2020-2025 Carlisle Companies Waterproofing Membrane Market Share

Table Johns Manville Information

Table SWOT Analysis of Johns Manville

Table 2020-2025 Johns Manville Waterproofing Membrane Sale Volume Price Cost Revenue

Figure 2020-2025 Johns Manville Waterproofing Membrane Sale Volume and Growth Rate

Figure 2020-2025 Johns Manville Waterproofing Membrane Market Share

Table CKS Information

Table SWOT Analysis of CKS

Table 2020-2025 CKS Waterproofing Membrane Sale Volume Price Cost Revenue

Figure 2020-2025 CKS Waterproofing Membrane Sale Volume and Growth Rate

Figure 2020-2025 CKS Waterproofing Membrane Market Share

Table BNBM Information

Table SWOT Analysis of BNBM

Table 2020-2025 BNBM Waterproofing Membrane Sale Volume Price Cost Revenue

Figure 2020-2025 BNBM Waterproofing Membrane Sale Volume and Growth Rate

Figure 2020-2025 BNBM Waterproofing Membrane Market Share

Table Standard Industries Information

Table SWOT Analysis of Standard Industries

Table 2020-2025 Standard Industries Waterproofing Membrane Sale Volume Price Cost Revenue

Figure 2020-2025 Standard Industries Waterproofing Membrane Sale Volume and Growth Rate

Figure 2020-2025 Standard Industries Waterproofing Membrane Market Share

Table Holcim Elevate Information

Table SWOT Analysis of Holcim Elevate

Table 2020-2025 Holcim Elevate Waterproofing Membrane Sale Volume Price Cost Revenue

Figure 2020-2025 Holcim Elevate Waterproofing Membrane Sale Volume and Growth Rate

Figure 2020-2025 Holcim Elevate Waterproofing Membrane Market Share

Table RPM International Information

Table SWOT Analysis of RPM International

Table 2020-2025 RPM International Waterproofing Membrane Sale Volume Price Cost Revenue

Figure 2020-2025 RPM International Waterproofing Membrane Sale Volume and Growth Rate

Figure 2020-2025 RPM International Waterproofing Membrane Market Share

Table Hongyuan Information

Table SWOT Analysis of Hongyuan

Table 2020-2025 Hongyuan Waterproofing Membrane Sale Volume Price Cost Revenue

Figure 2020-2025 Hongyuan Waterproofing Membrane Sale Volume and Growth Rate

Figure 2020-2025 Hongyuan Waterproofing Membrane Market Share

Table Dayu Group Information

Table SWOT Analysis of Dayu Group

Table 2020-2025 Dayu Group Waterproofing Membrane Sale Volume Price Cost Revenue

Figure 2020-2025 Dayu Group Waterproofing Membrane Sale Volume and Growth Rate

Figure 2020-2025 Dayu Group Waterproofing Membrane Market Share

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