+357 96 030922
info@marketpublishers.com

Below-Grade Waterproofing Membranes Market Forecasts to 2032 – Global Analysis By Product (Sheet Membranes, Liquid Applied Membranes, Bentonite-based Membranes and Torch-Applied Membranes), Material, Installation Type, Application, End User and By Geography

https://marketpublishers.com/r/BE2F9F9E7FF3EN.html
Date: May 2025
Pages: 150
Price: US$ 4,150.00 (Single User License)
ID: BE2F9F9E7FF3EN

Abstracts

According to Stratistics MRC, the Global Below-Grade Waterproofing Membranes Market is accounted for $2.9 billion in 2025 and is expected to reach $4.6 billion by 2032 growing at a CAGR of 6.6% during the forecast period. Below-grade waterproofing membranes are protective barriers applied to the exterior or interior surfaces of structures built below ground level, such as basements, foundations, and tunnels. These membranes prevent water infiltration and protect against moisture, groundwater, and chemical contaminants that can damage concrete and structural components. Typically made from materials like bituminous sheets, liquid-applied coatings, or synthetic polymers, they ensure long-term durability and structural integrity.

Market Dynamics:

Driver:

Rapid Urbanization and Infrastructure Development

Rapid urbanization and infrastructure development are significantly driving the growth of the below-grade waterproofing membranes market. As cities expand and construction of underground structures such as basements, tunnels, and parking garages increases, the demand for durable waterproofing solutions rises. These membranes ensure

+357 96 030922
info@marketpublishers.com

structural integrity and prevent water ingress, making them essential in modern construction. Additionally, government investments in smart cities and sustainable infrastructure further boost adoption, creating substantial opportunities for market players in emerging and developed economies alike.

Restraint:

High Initial Costs

High initial costs of below-grade waterproofing membranes pose a significant challenge to market growth. The expense of material installation, coupled with the need for specialized labor, makes it a high-investment option, particularly for residential and small-scale projects. This financial barrier often leads to a preference for lower-cost alternatives, hindering widespread adoption. Despite the long-term benefits, the upfront costs discourage many potential customers, limiting market expansion in certain regions.

Opportunity:

Technological Advancements

Technological advancements are positively transforming the below-grade waterproofing membranes market by enhancing product durability and environmental sustainability. Innovations in materials science, such as self-healing and spray-applied membranes, improve performance in harsh conditions and reduce installation time. Smart membrane technologies with integrated sensors enable real-time monitoring of moisture levels, minimizing maintenance needs. These developments drive demand across residential, commercial, and infrastructure projects and fueling market growth through increased efficiency and cost-effectiveness.

Threat:

Complex Installation Processes

The complex installation processes of below-grade waterproofing membranes have a undesirable impact on the market, hindering its growth. These intricate procedures often require specialized labor and expertise, increasing project timelines and costs. Additionally, improper installation can lead to membrane failures, further escalating maintenance expenses and reducing customer confidence. This complexity acts as a

+357 96 030922
info@marketpublishers.com

barrier, limiting adoption, especially in regions with a shortage of skilled labor or high construction costs.

Covid-19 Impact

The COVID-19 pandemic significantly disrupted the below-grade waterproofing membranes market, primarily due to halted construction activities, supply chain disruptions, and labor shortages. These challenges led to project delays, increased material costs, dampening demand across residential, commercial, and infrastructure sectors. However, the healthcare construction boom provided some stability. As economies recover, the market is projected to rebound, driven by urbanization and a shift towards energy-efficient, sustainable building practices.

The bituminous segment is expected to be the largest during the forecast period

The bituminous segment is expected to account for the largest market share during the forecast period, due to its excellent adhesion, durability, and cost-effectiveness. Its resistance to water ingress, chemicals, and extreme temperatures makes it ideal for protecting below-grade structures like basements, tunnels, and foundations. With growing infrastructure development and urbanization—especially in emerging economies—demand for bituminous membranes is surging. Their ease of installation and compatibility with a variety of substrates further boosts their appeal, driving significant market growth.

The tunnels segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the tunnels segment is predicted to witness the highest growth rate, due to rising demand for durable, water-resistant infrastructure in transportation and urban development projects. Tunnels, being highly susceptible to groundwater intrusion and moisture-related deterioration, require effective waterproofing solutions to ensure structural integrity and longevity. Increasing investments in metro rail systems, road tunnels, and utility tunnels across the globe are further propelling the adoption of advanced waterproofing membranes, thereby boosting market growth and innovation within this critical construction segment.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share as urbanization accelerates, the demand for durable and reliable waterproofing

+357 96 030922
info@marketpublishers.com

solutions for underground structures, including basements, tunnels, and foundations, increases. These membranes enhance the longevity and safety of buildings by preventing water ingress, reducing maintenance costs, and ensuring structural integrity. With rapid growth in real estate, commercial spaces, and government projects, the market plays a crucial role in regional economic development.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, owing to increasing construction activities, especially in commercial and residential sectors. These membranes offer critical protection against water damage, extending the lifespan of buildings and reducing maintenance costs. The rising demand for sustainable construction and the need for enhanced building durability are driving market expansion. Additionally, advancements in membrane technology, offering improved performance and cost-efficiency, further enhance the market's positive impact on the region’s infrastructure development.

Key players in the market

Some of the key players profiled in the Below-Grade Waterproofing Membranes Market include BASF SE, Sika AG, GCP Applied Technologies Inc., Carlisle Companies Inc., MAPEI S.p.A., RPM International Inc., Minerals Technologies Inc., SOPREMA Group, Tremco Incorporated, Fosroc International Ltd., Johns Manville Corporation, Renolit SE, AVM Industries, Dow Inc., Bostik, GAF Materials Corporation, Hyload Inc., Oriental Yuhong Waterproof Technology Co. Ltd., Penetron International Ltd. and Xypex Chemical Corporation.

Key Developments:

In April 2025, BASF announced its first Canadian Master Research Agreement (MRA) with the University of Toronto, marking a significant milestone in the company's efforts to expand its research collaborations in North America. This partnership aims to streamline innovation projects and foster collaboration between BASF researchers and Canadian academics.

In October 2024, BASF made a strategic partnership with Aspen Aerogels to enhance its aerogel product offerings and expand its market reach. This partnership is set to drive innovation in aerogel technologies, particularly in high-performance insulation materials.

+357 96 030922
info@marketpublishers.com

Products Covered:

- Sheet Membranes
- Liquid Applied Membranes
- Bentonite-based Membranes
- Self-Adhered Membranes
- Torch-Applied Membranes

Materials Covered:

- Bituminous
- Polyurethane
- Polyvinyl Chloride (PVC)
- Ethylene Propylene Diene Monomer (EPDM)
- Other Materials

Installation Types Covered:

- Pre-Applied
- Post-Applied

Applications Covered:

- Basements
- Tunnels

+357 96 030922
info@marketpublishers.com

- Foundations
- Retaining Walls
- Parking Structures
- Other Applications

End Users Covered:

- Residential
- Commercial
- Industrial

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France

+357 96 030922
info@marketpublishers.com

- Spain
- Rest of Europe

Asia Pacific

- Japan
- China
- India
- Australia
- New Zealand
- South Korea
- Rest of Asia Pacific

South America

- Argentina
- Brazil
- Chile
- Rest of South America

Middle East & Africa

- Saudi Arabia
- UAE
- Qatar
- South Africa

+357 96 030922
info@marketpublishers.com

Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2022, 2023, 2024, 2026, and 2030
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

+357 96 030922
info@marketpublishers.com

Contents

+357 96 030922
info@marketpublishers.com

5 GLOBAL BELOW-GRADE WATERPROOFING MEMBRANES MARKET, BY PRODUCT

5.1 Introduction
5.2 Sheet Membranes
5.3 Liquid Applied Membranes
5.4 Bentonite-based Membranes
5.5 Self-Adhered Membranes
5.6 Torch-Applied Membranes

6 GLOBAL BELOW-GRADE WATERPROOFING MEMBRANES MARKET, BY MATERIAL

6.1 Introduction
6.2 Bituminous
6.3 Polyurethane
6.4 Polyvinyl Chloride (PVC)
6.5 Ethylene Propylene Diene Monomer (EPDM)
6.6 Other Materials

7 GLOBAL BELOW-GRADE WATERPROOFING MEMBRANES MARKET, BY INSTALLATION TYPE

7.1 Introduction
7.2 Pre-Applied
7.3 Post-Applied

8 GLOBAL BELOW-GRADE WATERPROOFING MEMBRANES MARKET, BY APPLICATION

8.1 Introduction
8.2 Basements
8.3 Tunnels
8.4 Foundations
8.5 Retaining Walls
8.6 Parking Structures
8.7 Other Applications

+357 96 030922
info@marketpublishers.com

9 GLOBAL BELOW-GRADE WATERPROOFING MEMBRANES MARKET, BY END USER

10 GLOBAL BELOW-GRADE WATERPROOFING MEMBRANES MARKET, BY GEOGRAPHY

+357 96 030922
info@marketpublishers.com

11 KEY DEVELOPMENTS

12 COMPANY PROFILING

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

+357 96 030922
info@marketpublishers.com

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

+357 96 030922
info@marketpublishers.com

I would like to order

Product name: Below-Grade Waterproofing Membranes Market Forecasts to 2032 – Global Analysis By Product (Sheet Membranes, Liquid Applied Membranes, Bentonite-based Membranes and Torch-Applied Membranes), Material, Installation Type, Application, End User and By Geography

Product link: https://marketpublishers.com/r/BE2F9F9E7FF3EN.html

Price: US$ 4,150.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:
info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page https://marketpublishers.com/r/BE2F9F9E7FF3EN.html