

North America Waterproofing Membrane Market By Material (Modified Bitumen, PVC, TPO, EPDM, HDPE, LDPE), By Type (Liquid-applied Membranes, Sheet Based Membranes), By Application (Roofing & Walls, Water & Waste Management, Building Structures, Tunnel Liners, Bridges & Highways), By Country, By Competition, Forecast and Opportunities, 2020-2030F

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Abstracts

Market Overview

The North America Waterproofing Membrane Market was valued at USD 9.19 billion in 2024 and is anticipated to grow significantly, reaching USD 14.35 billion by 2030, at a CAGR of 7.71% during the forecast period. Waterproofing membranes are essential in protecting structures like roofs, basements, walls, and foundations from water damage, corrosion, and decay. These materials, available in liquid-applied and sheet-based forms, are vital for enhancing building longevity, particularly in regions prone to heavy rainfall and flooding. Market growth is driven by rising construction and renovation activities in the U.S. and Canada, heightened awareness of water damage risks, and the increasing preference for environmentally friendly, low-VOC products. Technological innovations such as self-adhesive sheets and polyurethane coatings are further boosting adoption across residential, commercial, and industrial sectors. Additionally, government investments in public infrastructure are fueling demand for advanced waterproofing systems.

Key Market Drivers

Rising Infrastructure Development in Urban and Semi-Urban Regions Driving Demand

for Advanced Waterproofing Systems

The North America waterproofing membrane market is experiencing notable expansion, propelled by a surge in infrastructure projects across urban and semi-urban areas. Major cities like New York, Toronto, Chicago, and Dallas are undergoing extensive real estate and public infrastructure developments, backed by substantial investments from both government bodies and private developers focusing on sustainable and durable construction practices. With infrastructure modernization efforts aiming to enhance the durability of roads, bridges, tunnels, and public facilities, waterproofing membranes have become indispensable to ensuring long-term structural performance. Initiatives like the U.S. Infrastructure Investment and Jobs Act, allocating over a trillion dollars for transportation and water systems, are significantly boosting membrane demand. Applications of sheet and liquid membranes are expanding across below-grade structures, rooftops, and facades in both new constructions and renovation projects.

Key Market Challenges

Regulatory Complexity and Variability Across Jurisdictions Hindering Standardized Adoption

The North America waterproofing membrane market faces a major hurdle due to the complexity and inconsistency of regulatory frameworks across federal, state, provincial, and municipal levels. Building codes and environmental standards differ widely across regions in the U.S. and Canada, complicating product development, certification, and marketing efforts. For instance, California's stringent VOC limitations differ considerably from those in Texas or Florida, while British Columbia in Canada demands higher environmental compliance than other provinces. This fragmented regulatory environment leads to increased R&D costs as manufacturers must customize formulations to meet diverse requirements. Additionally, varying certification processes through organizations like the Canadian Construction Materials Centre and Underwriters Laboratories delay product approvals and elevate operational expenses. Tightening sustainability and indoor air quality regulations also require membrane reformulations, sometimes at odds with durability expectations, making it difficult for advanced technologies to scale, particularly for smaller manufacturers.

Key Market Trends

Rising Adoption of Sustainable and Eco-Friendly Waterproofing Membranes

Sustainability is becoming a defining trend in the North America waterproofing membrane market, driven by environmental concerns and regulatory pressures on carbon emissions. There is a growing preference for membranes made from renewable, recycled, or low-emission materials. Manufacturers are innovating by introducing products that reduce reliance on petroleum-based inputs, using natural rubber, recycled thermoplastics, and bio-based additives. Solvent-free and water-based membranes are gaining favor as environmentally friendly alternatives to traditional solvent-based products. Green building certification systems like LEED are influencing choices, with developers favoring membranes that support energy efficiency and sustainable construction objectives. Adoption of eco-friendly membranes is especially strong in commercial and institutional projects, aligning with broader trends such as cool roofing and vegetative roofing systems. This environmentally conscious shift is expected to drive substantial long-term growth for sustainable waterproofing solutions.

Key Market Players

Sika AG

Standard Industries Inc.

Johns Manville

Bridgestone Americas, Inc.

BASF SE

Dow Chemical Company

Henry Company

Bostik SA

Report Scope:

In this report, the North America Waterproofing Membrane Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

North America Waterproofing Membrane Market, By Material:

Modified Bitumen

PVC

TPO

EPDM

HDPE

LDPE

North America Waterproofing Membrane Market, By Type:

Liquid-applied Membranes

Sheet Based Membranes

North America Waterproofing Membrane Market, By Application:

Roofing & Walls

Water & Waste Management

Building Structures

Tunnel Liners

Bridges & Highways

North America Waterproofing Membrane Market, By Country:

United States

Canada

Mexico

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the North America Waterproofing Membrane Market.

Available Customizations:

North America Waterproofing Membrane Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
- 1.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Formulation of the Scope
- 2.4. Assumptions and Limitations
- 2.5. Sources of Research
 - 2.5.1. Secondary Research
 - 2.5.2. Primary Research
- 2.6. Approach for the Market Study
 - 2.6.1. The Bottom-Up Approach
 - 2.6.2. The Top-Down Approach
- 2.7. Methodology Followed for Calculation of Market Size & Market Shares
- 2.8. Forecasting Methodology
 - 2.8.1. Data Triangulation & Validation

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, and Trends

4. VOICE OF CUSTOMER

5. NORTH AMERICA WATERPROOFING MEMBRANE MARKET OUTLOOK

- 5.1. Market Size & Forecast

- 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Material (Modified Bitumen, PVC, TPO, EPDM, HDPE, LDPE)
 - 5.2.2. By Type (Liquid-applied Membranes, Sheet Based Membranes)
 - 5.2.3. By Application (Roofing & Walls, Water & Waste Management, Building Structures, Tunnel Liners, Bridges & Highways)
 - 5.2.4. By Country (United States, Canada, Mexico)
 - 5.2.5. By Company (2024)
- 5.3. Market Map

6. UNITED STATES WATERPROOFING MEMBRANE MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Material
 - 6.2.2. By Type
 - 6.2.3. By Application

7. CANADA WATERPROOFING MEMBRANE MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Material
 - 7.2.2. By Type
 - 7.2.3. By Application

8. MEXICO WATERPROOFING MEMBRANE MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Material
 - 8.2.2. By Type
 - 8.2.3. By Application

9. MARKET DYNAMICS

- 9.1. Drivers
- 9.2. Challenges

10. MARKET TRENDS & DEVELOPMENTS

- 10.1. Merger & Acquisition (If Any)
- 10.2. Product Launches (If Any)
- 10.3. Recent Developments

11. COMPANY PROFILES

- 11.1. Sika AG
 - 11.1.1. Business Overview
 - 11.1.2. Key Revenue and Financials
 - 11.1.3. Recent Developments
 - 11.1.4. Key Personnel/Key Contact Person
 - 11.1.5. Key Product/Services Offered
- 11.2. Standard Industries Inc.
- 11.3. Johns Manville
- 11.4. Bridgestone Americas, Inc.
- 11.5. BASF SE
- 11.6. Dow Chemical Company
- 11.7. Henry Company
- 11.8. Bostik SA

12. STRATEGIC RECOMMENDATIONS

13. ABOUT US & DISCLAIMER

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