

**India Waterproofing Material Market Assessment, By Material Type [Cement-based Waterproofing Materials, Liquid Waterproofing Membrane Materials, Liquid Bituminous Membrane Waterproofing Materials, Sheet Membrane Waterproofing Materials, Polyurethane Liquid Membrane Waterproofing Materials, Others], By Application [Floors and Basements, Bridges and Highways, Sewage Treatment Plants, Tunnel Liners, Roofing and Walls, Others], By Distribution Channel [Online, Offline] By Region, Opportunities and Forecast, FY2018-FY2032F**

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**Report description:**

India waterproofing material market is projected to witness a CAGR of 7.67% during the forecast period FY2025-FY2032, growing from USD 1.25 billion in FY2024 to USD 2.26 billion in FY2032. The market in India is experiencing robust growth owing to the rise in construction and infrastructure development across the country, coupled with an increase in government schemes concerning housing projects. Government schemes such as the Smart Cities Mission and the Housing for All Program drive the demand for waterproofing materials. Along with this, rapid urbanization and an increase in the construction of new residential, commercial, and industrial projects amplify the need for high-performance waterproofing materials. Large-scale projects, including metro networks, highways, bridges, and multiple buildings, require high-performance waterproofing solutions for safety and durability. The waterproofing materials are effective in protecting against water damage and their consequential problems that cause critical consequences, including weakening structures and shortening the life spans of buildings. With the average annual rainfall of about 1,200 millimeters in India and increasing cases of urban flooding, the need for adequate waterproofing materials to shelter and protect infrastructure from water damage is immense, propelling the demand for India waterproofing materials market. One

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notable area of advancement in waterproofing is liquid-applied membrane technology, whose utilization is increasing in the construction sector in the country. This trend is expected to drive growth in the waterproofing materials market across India. Due to this, companies are entering into a strategic partnership to expand their high-performance product lines and leverage the expertise of high-performance waterproofing solutions provided by the partnered company for challenging construction sites. For instance, in April 2022, Pidilite Industries Limited partnered with GCP Applied Technologies Inc, a global leader in construction products, to offer high-performance waterproofing products for challenging sites that have exposure to high-temperature variation and water tables, under its brand Dr.Fixit. Products, including PREPRUFE are high-performance, pre-applied waterproofing systems for critical applications in below-grade construction. It prevents water migration along seams, which can potentially compromise the integrity of the foundation of structures. There is easy installation with robust protection against moisture, gas, and UV radiation for harsh environments. SILCOR 1100 is another product that is a structural waterproofing membrane specifically designed for buried applications. This product is economical, fast to apply, seamless, and durable with an unlimited overcoat time, which limits waste and prolongs the life of concrete structures.

#### Demand for Residential Construction to Drive Market Growth

The demand for waterproofing materials in India is rising due to the growing residential real estate sector. The World Bank estimated that 40% of the population will live in urban areas by 2036, which was 31% in 2011. The residential sector is projected to be the largest consumer of waterproofing materials, holding a significant market share and is expected to grow during the forecast period. As India's construction market is set to become the third largest globally by 2025, the demand for innovative and eco-friendly waterproofing solutions will increase, presenting significant opportunities for manufacturers and suppliers in this expanding market. As urban areas expand, the need for robust waterproofing solutions becomes increasingly critical to protect residential from water damage. Moreover, India's climate characterized by heavy monsoon rains, amplifies the need for advanced waterproofing products. The changing consumer preferences for products are driving the demand for innovative waterproofing products that mitigate the impact of climate while providing effective protection. As a result, manufacturers and companies are innovating to solve problems such as leaky roofs, damp basements, cracked walls, and peeling paint that are caused by heavy rains.

For instance, in October 2023, Berger Paints Limited developed the Berger DAMPSTOP product line that provides waterproofing products with streamlined process-to-consumer and a range of solutions to meet several different waterproofing needs, including dampness, silane treatment, and salt leaching treatment. Moreover, the product is posed as an effective solution to the problems caused by heavy rains.

#### Climate Risks Drive the Waterproofing Market Growth

Waterproofing materials play a significant role in reducing risks from water seepage, building structures from decaying and extending their overall lifespan. Due to the increased frequency of weather conditions and flooding in cities, construction industries are prone to provide waterproofing solutions. The increasing frequency of heavy rainfalls due to climate changes causes moisture and weakens the buildings' structure. Effective waterproofing systems are crucial in preventing moisture-related issues such as mold growth and foundation damage, driving the demand for India waterproofing materials market in the forecast period. Builders, developers, and homeowners are increasingly adopting advanced waterproofing technologies to minimize the climate impact on their buildings. The growing popularity of liquid-applied membranes and crystalline admixtures due to their superior performances and easier applications is expected to further propel the waterproofing materials market, as customers prioritize effective solutions to minimize the impact of climate variability and urban flooding. The demand for waterproofing materials in India is set to witness substantial growth, driven by companies launching a wider range of solutions to meet the diverse needs of customers.

For instance, in August 2023, Asian Paints Limited launched its new product Asian paints Smart Care Hydroloc, a ready-to-use interior water-proofing solution that can be applied effortlessly. SmartCare Hydroloc is an easy, convenient, and effortless, solution for interior waterproofing problems due to changing climatic conditions.

#### Increasing Demand for Cement-based Waterproofing Materials

Cement-based waterproofing materials are experiencing a significant demand, led by advancements in product development and the growing demand from the construction industry. The expanding segment of cement-based waterproofing materials is attributed to the rising number of buildings requiring protection against water damage in cement-based construction. This

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advancement has further accelerated due to the production of a wide variety of products for the foundation, roof, and basement wall areas. Increasing consumer awareness of advanced water-proofing solutions is promoting usage of cement-based waterproofing materials as more consumers want reliable and effective products. As the construction sector evolves, the emphasis on durable waterproofing materials will play a crucial role in ensuring the longevity and integrity of structures, further driving market growth and innovation in this essential segment. Moreover, consumer awareness in India is a key driver of innovation and competitiveness within this segment. As a result, companies are providing a broader range of options to meet diverse consumer needs. This responsiveness to market demands enhances product offerings and fosters growth in the sector. For instance, in February 2023, Bostik India Private Limited launched the SEAL & BLOCK brand, which offers multiple cement-based waterproofing solutions from basement to roof across the globe.

#### Southern India to Witness High Growth Rate for Most Types of Waterproofing

Southern India was the largest growing region for waterproofing materials during the forecast period due to several significant factors, including high urbanization in Kerala, Karnataka, Tamil Nadu, Telangana, and Andhra Pradesh and infrastructure development concurrent with renovation activities in these economically developed states. The Indian government is investing heavily in construction projects across southern India to develop modern infrastructure as materials enhance the durability and sustainability of the new infrastructure and buildings. Most of the consumers in South India are looking for waterproofing solutions that prove to be low-cost compared to other waterproofing solutions, providing better quality of work in the construction, and subsequently yield better results in the long run in the future. Infrastructure projects such as roads, bridges, metros, and tunnels in India are fueling the demand for waterproofing solutions in the region directly. Companies aim to partner and launch products according to the needs of customers through acquisitions to gain a larger market share on a global scale.

For instance, in March 2023, Nippon Paint (India) Private Limited would foray into the USD 1.48 billion construction chemicals market as it eyes to expand its product portfolio, with setting up the plant in Chennai, Tamil Nadu. Nippon Paint planned to increase the dealer touch points by 50 percent. Attributing to the increase in residential and commercial building constructions for its foray into the construction chemicals division, according to the Nippon Paint waterproofing product will grow due to the rapid urbanization.

#### Future Market Scenario (FY2025 – FY2032F)

□ Advanced waterproofing materials are likely to gain significant traction owing to rapid urbanization and increasing investments in small and large construction projects across India.

□ The government's increasing investments in construction development will increase the demand for waterproofing materials further.

□ New companies entering the market and incumbent firms expanding their product line will increase competition in the marketplace. There is potential for collaboration between manufacturers and construction companies to create specialized solutions suited to the needs of individual projects.

□ An increasing number of commercial and non-commercial construction projects in emerging economies is expected to increase the overall demand for waterproofing materials in the forecast period.

#### Key Players Landscape and Outlook

Higher investments in the construction and building sector on a large scale is boosting the demand for waterproofing materials and augmenting the growth of the market. Companies have been trying to gain longer-term strategic alliances and product launches based on the needs of customers in diverse regions in India through the acquisitions to come out with a stronger market share in the India waterproofing market. Thus, companies that innovate and respond better in terms of demand from consumers are set to thrive in this competitive space, keeping the India waterproofing companies at the forefront in addressing the changing demands of consumers for style and functionality at homes. Companies are getting into joint ventures, partnerships, and acquisitions to expand their product reach into new markets.

For instance, in June 2024, Saint-Gobain Group announced the acquisition of FOSROC through a definitive agreement. Following the acquisitions of Chryso in 2021, GCP in 2022, and 33 additional acquisitions since 2021, this move is a new strategic step in establishing Saint-Gobain's worldwide presence in construction chemicals. FOSROC is a global construction chemicals player with a strong geographic footprint in India. FOSROC provides a wide range of technical solutions for the construction industry, including admixtures and additives for waterproofing solutions, concrete and cement, adhesives and sealants, concrete repair solutions,

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and flooring.

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