

Global Waterproofing Market - Focused Insights 2025-2030

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Report description:

The global waterproofing market is expected to grow at a CAGR of 4.06% from 2024 to 2030.

RECENT VENDOR ACTIVITIES

- In April 2024, Sika presented Protective Membranes at Coverings 2024. Sika showcased its SikaTile crack-isolation and waterproofing solutions, emphasizing the importance of protective membranes for tile and stone installations. This development reflects the growing demand for advanced waterproofing products that enhance the durability and longevity of installations. Market players can adapt to this shift by investing in specialized, high-performance solutions that meet the increasing requirements for tile and stone installation protection across various construction sectors.
- In January 2024, SOPREMAPOOL introduced the Tex 350 PP Geotextile. This 100% recycled polypropylene non-woven geotextile acts as a protective and separating layer for pool structures, preventing stains and extending membrane life. The product's sustainability focus and added benefits for pool installations highlight the rising demand for eco-friendly and efficient waterproofing solutions. To stay competitive, market players can develop similar sustainable, high-performance products while incorporating recyclable materials and enhancing the functionality of waterproofing systems.

KEY TAKEAWAYS

- By Product Type: The liquid-applied membrane(LAM) segment holds the largest market share in 2024. Advancements in LAM technology, such as polyurethane, acrylic, and bituminous-based membranes, are driving demand for the segment.
- By Raw Materials: The modified bitumen segment holds the largest market share of over 38%. The segment is growing due to an increase in demand due to its cost-effectiveness and availability, making it a popular choice in developing regions like APAC and Latin America,
- By Application: Underground construction shows the highest CAGR of 4.69% during the forecast period. Waterproofing in underground constructions, such as basements, tunnels, and subways, is crucial for preventing water seepage and ensuring structural stability, making this segment a key growth area.

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-□By Construction Outlook: The new construction segment holds the largest market share. The rapid urbanization in emerging economies, such as China, India, and Brazil, is driving the demand for waterproofing solutions in new residential, commercial, and industrial construction projects.

-□By Geography: North America dominates and holds the largest market share of over 35% due to the high demand for advanced waterproofing solutions across construction, infrastructure, and industrial sectors.

-□Growth Factor: The global waterproofing market is set to grow due to increasing demand for waterproofing solutions in industrial applications and rapid urbanization and infrastructure development.

MARKET TRENDS & DRIVERS

Application of Nanotechnology

Nanotechnology is a transformative force in the waterproofing market, enabling the creation of highly durable, hydrophobic, and lightweight solutions. Nano-coatings, made from ultra-fine particles, can bond with surfaces like concrete, wood, glass, and metals, creating impermeable layers that repel water and moisture effectively. These coatings also exhibit enhanced resistance to UV radiation, microbial growth, and wear, making them suitable for high-performance applications in critical infrastructure projects, industrial facilities, and residential buildings. For example, nano-silica is widely used in concrete waterproofing to improve density and reduce permeability, while nano-ceramic coatings are being adopted in industrial environments to protect metallic surfaces against corrosion. The adoption of such nanotechnology-based products is particularly strong in developed markets such as North America and Europe, where there is a high demand for advanced waterproofing materials for infrastructure rehabilitation projects. Furthermore, nanotechnology is enabling the development of smart waterproofing solutions, such as coatings that change color to indicate water damage, which could transform maintenance practices. While initial costs remain a barrier to widespread adoption, the long-term benefits of enhanced durability and reduced maintenance are driving increased demand.

Increasing Awareness About Green Roofs

Green roofs, also referred to as eco-roofs or vegetative roofs, are growing in popularity worldwide due to their numerous environmental and economic benefits. These roofs involve the installation of vegetation on rooftops to enhance urban sustainability by reducing urban heat islands, improving air quality, managing stormwater, and providing insulation. Waterproofing plays a critical role in ensuring the structural integrity of green roofs, as it prevents water seepage and supports plant growth over the long term. In Europe, particularly in countries like Germany, the adoption of green roofs is bolstered by government incentives, strict environmental regulations, and a commitment to sustainable urban development. For instance, German municipalities offer subsidies for green roof installations, which has led to a surge in demand for root-resistant waterproofing membranes. Similarly, in North America, cities like Chicago and Toronto are actively promoting green roofs through policy frameworks and tax incentives, driving the need for specialized waterproofing solutions. Manufacturers are responding by developing advanced waterproofing products tailored to green roofs, such as liquid-applied membranes and high-strength barriers designed to resist root intrusion and weather fluctuations. As urban areas continue to expand globally, the green roof segment is expected to provide lucrative growth opportunities in regions such as Asia-Pacific, where cities like Singapore are integrating green infrastructure into urban planning.

Rapid Urbanization And Infrastructure Development

The unprecedented rate of urbanization across the globe is a key driver of the waterproofing market. In developing economies such as China, India, and Brazil, rapid population growth and migration to urban centers are fueling demand for housing, commercial spaces, and extensive infrastructure. The construction of high-rise residential complexes, shopping malls, transportation hubs, and utility systems necessitates waterproofing solutions to ensure structural integrity and durability against

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moisture-induced damage. For example, China's ongoing urbanization, underpinned by large-scale government programs like the "New Urbanization Plan," is driving infrastructure development, including smart cities and high-speed rail projects. Similarly, India's "Smart Cities Mission" and "Housing for All" initiatives involve substantial investments in infrastructure, including affordable housing and public utilities. These projects require waterproofing technologies for applications such as underground parking, metro systems, and water storage facilities. In developed regions like North America and Europe, the focus is on upgrading aging infrastructure. For example, bridge repairs, road renovations, and the restoration of historical buildings often rely on advanced waterproofing materials like liquid-applied membranes and epoxy-based coatings.

INDUSTRY RESTRAINTS

Volatile Raw Material Prices

The volatility of raw material prices remains a critical challenge in the waterproofing market, significantly impacting production costs and profit margins. Waterproofing products rely heavily on petroleum-based materials such as bitumen, polyurethane, and acrylic polymers. The prices of these materials are highly sensitive to fluctuations in crude oil prices, which are influenced by global factors such as geopolitical tensions, supply chain disruptions, natural disasters, and policy changes in oil-producing nations. For example, the surge in crude oil prices in recent years has caused bitumen prices to spike, directly affecting the cost of bitumen-based waterproofing membranes. Similarly, polyurethane, widely used in liquid-applied membranes, depends on raw materials like isocyanates and polyols. Price increases in these inputs ripple through the supply chain, making it difficult for manufacturers to maintain competitive pricing. Additionally, these price fluctuations often result in financial uncertainty for both manufacturers and contractors, especially in long-term projects. In many cases, manufacturers are forced to absorb cost increases temporarily or pass them on to end-users, which can reduce demand for high-quality waterproofing solutions. The lack of price stability also discourages smaller players from investing in innovation or expanding their production capacities, hindering the market's growth potential.

SEGMENTATION INSIGHTS

INSIGHTS BY PRODUCT TYPE

The global waterproofing market by product type is segmented into liquid applied membrane(LAM) and sheet-based membrane. In 2024, the liquid-applied membrane (LAM) segment accounted for the largest market share, driven by its flexibility, ease of application, and superior adaptability to complex building structures. It is widely preferred in both residential and commercial projects. Advancements in LAM technology, including polyurethane, acrylic, and bituminous-based membranes, are further boosting demand by offering enhanced water resistance, durability, and chemical resistance for long-term applications. The segment is experiencing significant growth in APAC and Latin America, fueled by rapid urbanization, infrastructure expansion, and the increasing need for efficient waterproofing solutions in emerging economies. Additionally, innovations in materials like polyurethane and acrylic are prompting market players to adopt more sustainable, eco-friendly solutions. This shift aligns with the growing demand for green building practices, particularly in regions such as APAC and Latin America, where urban development is accelerating.

INSIGHTS BY RAW MATERIALS

The global waterproofing market by raw materials is categorized into modified bitumen, polyvinyl chloride(PVC), ethylene propylene diene monomer (EPDM), and others. The modified bitumen dominates and holds the largest market share of over 38%. Modified bitumen is a widely used raw material in the waterproofing market, valued for its excellent adhesion, flexibility, and resistance to environmental factors such as UV radiation and temperature fluctuations. It is particularly favored in applications like roofing, tunnels, and foundations, where its durability and ability to provide long-term waterproofing under high stress are

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essential. Demand for modified bitumen is driven by its cost-effectiveness and widespread availability, making it a preferred choice in developing regions like APAC and Latin America, where infrastructure development is rapidly progressing. Additionally, the growing adoption of cold-applied modified bitumen products, which enhance safety and improve installation efficiency, is further increasing its popularity in both residential and industrial projects.

INSIGHTS BY APPLICATION

Based on the application, underground construction shows significant growth, with the fastest-growing CAGR of 4.69% during the forecast period. Waterproofing in underground structures, including basements, tunnels, and subways, is essential to prevent water seepage and ensure structural stability, making this segment a critical growth area. The rising number of urbanization projects, such as metro systems and underground parking facilities, is driving demand for advanced waterproofing solutions, particularly in regions like APAC and the Middle East. Specialized materials such as HDPE and EVA are widely used in underground applications due to their high resistance to chemicals and environmental stresses, making them ideal for industrial and infrastructure projects. Additionally, innovations like self-healing membranes and hybrid waterproofing systems are gaining traction, addressing the complex requirements of underground construction in challenging environments.

INSIGHTS BY CONSTRUCTION OUTLOOK

Based on the construction outlook, the new construction segment holds the largest share of the global waterproofing market. Rapid urbanization in emerging economies such as China, India, and Brazil is driving demand for waterproofing solutions in new residential, commercial, and industrial construction projects. To meet stringent performance requirements in these applications, manufacturers are introducing advanced materials like liquid-applied membranes and spray polyurethane foam. The adoption of eco-friendly waterproofing materials, including water-based membranes and VOC-free coatings, is gaining momentum as builders and contractors increasingly prioritize green building certifications. Furthermore, investments in large-scale infrastructure projects such as bridges, highways, and public utilities are fueling the demand for high-performance waterproofing systems in new construction.

GEOGRAPHICAL ANALYSIS

North America dominates and holds the largest share of over 35% in the global waterproofing market. The North American waterproofing market is driven by the high demand for advanced waterproofing solutions across construction, infrastructure, and industrial sectors, with increasing emphasis on long-term durability and environmental sustainability. The region is witnessing significant investments in retrofitting and renovation of aging infrastructure, including residential homes, commercial buildings, and public projects, boosting the adoption of innovative waterproofing technologies.

APAC shows prominent growth, with the fastest-growing CAGR of 4.80% during the forecast period. The region's booming construction industry, particularly in residential and commercial segments, is fueling demand for waterproofing solutions to address moisture, durability, and energy efficiency concerns. According to the report of Jones Lang LaSalle IP India 2024, there are signs of recovery for residential sales across the Asia Pacific, despite buyers largely remaining cautious. Rents generally held steady across the region, and capital values saw growth in many markets, supported by resilient demand for high-quality properties. Government investments in infrastructure development, such as smart cities, highways, railways, and airports, are creating significant opportunities for waterproofing manufacturers across the region.

COMPETITIVE LANDSCAPE

The global waterproofing market contains exclusive data on 38 vendors. The key players in the market include Soprema Group, Sika, Carlisle Construction Materials, Elevate, Dow, Saint-Gobain, Henkel, and MAPEI. The global waterproofing market is characterized by intense competition among established players focusing on product innovation, technological advancements,

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and strategic expansions to strengthen their market presence. Major players such as Soprema Groups, Sika, Carlisle Construction Materials, and Elevate have established a strong foothold through comprehensive product portfolios that cater to diverse construction and industrial needs.

Key Vendors

- [] Soprema Group
- [] Sika
- [] Carlisle Construction Materials
- [] Elevate
- [] Dow
- [] Saint-Gobain
- [] Henkel
- [] MAPEI

Other Prominent Vendors

- [] GAF
- [] Fosroc
- [] Asian Paints
- [] Concrete Waterproofing Systems
- [] Pidilite Industries
- [] Johns Manville
- [] BASF
- [] Kemper System
- [] Bauder
- [] CICO Technologies
- [] Alchimica
- [] RPM International
- [] ISOMAT
- [] Danrae Group
- [] IWL India
- [] Derbigum
- [] KOSTER
- [] Xypex Chemical Corporation
- [] Berger Paints
- [] Henkel Polybit Industries
- [] Kryton International
- [] Schomburg
- [] 3M
- [] Copernit
- [] Aisa Mortar
- [] KCC Corporation
- [] Covestro
- [] Bostik
- [] Elmich
- [] GMCI

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SEGMENTATION & FORECASTS

- By Product Type

- o Liquid Applied Membrane (LAM)
- o Sheet-Based Membrane

- By Raw Materials

- o Modified Bitumen
- o Polyvinyl Chloride (PVC)
- o Ethylene Propylene Diene Monomer (EPDM)
- o Others

- By Application

- o Roofing
- o Underground Constructions
- o Walls
- o Others

- By Construction Outlook

- o New Construction
- o Refurbishment

- By Geography

- North America

- o US
- o Canada

- Europe

- o Germany
- o UK
- o France

o Italy

o Spain

- APAC

o China

o India

o Japan

o South Korea

o Australia

- Latin America

o Brazil

o Mexico

o Argentina

- Middle East & Africa

o Turkey

o Saudi Arabia

o South Africa

o UAE

KEY QUESTIONS ANSWERED:

1. How big is the global waterproofing market?

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2. Which product type has the largest share in the global waterproofing market?
3. Which application provides more business opportunities in the global waterproofing market?
4. What are the latest trends in the global waterproofing market?
5. Who are the key players in the global waterproofing market?

Table of Contents:

CHAPTER - 1: Global Waterproofing Market Overview

- Executive Summary
- Key Findings
- Key Developments

CHAPTER - 2: Global Waterproofing Market Segmentation Data

- Product type Market Insights (2021-2030)
 - o Liquid Applied Membrane(LAM)
 - o Sheet-Based Membrane
- Raw Material Market Insights (2021-2030)
 - o Modified Bitumen
 - o Polyvinyl Chloride(PVC)
 - o Ethylene Propylene Diene Monomer (EPDM)
 - o Others
- Application Market Insights (2021-2030)
 - o Roofing
 - o Underground Constructions
 - o Walls
 - o Others
- Construction Outlook Market Insights (2021-2030)
 - o New Construction
 - o Refurbishment

CHAPTER - 3: Global Waterproofing Market Prospects & Opportunities

- Global Waterproofing Market Drivers
- Global Waterproofing Market Trends
- Global Waterproofing Market Constraints

CHAPTER - 4: Global Waterproofing Market Overview

- Global Waterproofing Market -Competitive Landscape
- Global Waterproofing Market - Key Players
- Global Waterproofing Market - Key Company Profiles

CHAPTER - 5: Appendix

- Research Methodology
- Abbreviations
- Arizton

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