

Liquid-applied Membrane Market by Type (Bituminous, Elastomeric, Cementitious), Application (Roofing, Walls, Roadways), Usage (New Construction, Refurbishment), End-use Industry (Commercial, Residential), And Region - Global Forecast to 2030

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Report description:

The liquid-applied membrane market is projected to reach USD 33.50 billion by 2030 from USD 25.27 billion in 2025, at a CAGR of 5.8% during the forecast period. Liquid-applied membranes (LAMs) are fluid-applied, seamless waterproofing systems that create a flexible and durable protective barrier. They are widely used in roofing, basements, terraces, tunnels, and other structural elements due to their ability to conform to complex surfaces and provide long-lasting protection against water ingress, UV radiation, and chemical exposure. The market for LAMs is being propelled by several factors, including the increasing demand for efficient and low-maintenance waterproofing solutions, the growth of the global construction industry, and a rising focus on energy-efficient and sustainable building materials. Additionally, LAMs are favored for their ease of application, rapid installation time, and superior performance over traditional sheet-based systems.

<https://www.marketsandmarkets.com/Images/liquid-applied-membranes-market-Overview.webp>

Regionally, growth is most prominent in Asia Pacific due to rapid urbanization, infrastructure development, and government housing initiatives in countries like China and India. North America is seeing strong demand driven by renovation and green building trends, while Europe's market is supported by stringent environmental regulations and emphasis on sustainable construction. The Middle East and Africa are also emerging as key markets due to increased investment in commercial infrastructure and transport projects. These regional dynamics, combined with the material's performance advantages, continue to support the global expansion of the liquid applied membrane market.

"Bituminous membranes segment is the second fastest-growing segment in the liquid-applied membrane market during the

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forecast period."

Bituminous membranes are one of the most widely used waterproofing solutions in the construction industry, known for their robustness, durability, and proven performance across a wide range of applications. These membranes are primarily composed of bitumen (asphalt), often modified with polymers such as Atactic Polypropylene (APP) or Styrene-Butadiene-Styrene (SBS), which enhance their elasticity, flexibility, and resistance to aging. Bituminous membranes are typically applied in sheet form or as liquid-applied coatings and are reinforced with materials like fiberglass or polyester to improve tensile strength and dimensional stability. These membranes are especially effective in providing long-lasting protection against water ingress in both horizontal and vertical surfaces. They are extensively used in roofing systems, basements, foundations, tunnels, bridges, and retaining walls. Their superior adhesion to a wide range of substrates, such as concrete, metal, and wood, ensures consistent performance even under challenging environmental conditions. The ability of bituminous membranes to withstand UV exposure, temperature extremes, and mechanical stress makes them ideal for exposed as well as buried applications. In recent years, environmental concerns have led to the development of modified bituminous membranes with lower VOC emissions and improved thermal performance, aligning with green building standards. Manufacturers are also focusing on improving installation efficiency by introducing prefabricated rolls with integrated adhesive layers and faster curing times. As construction activities continue to rise globally, especially in infrastructure and commercial sectors, the demand for bituminous membranes remains strong, supported by their ability to deliver reliable waterproofing across diverse project scales and environmental conditions.

"Refurbishment segment is the fastest-growing usage segment in the liquid-applied membrane market during the forecast period."

The refurbishment segment is emerging as one of the fastest-growing segments for liquid-applied membranes (LAMs), driven by a global surge in building renovation, infrastructure upgrades, and retrofitting of aging structures. As urban areas mature, the need to restore and modernize existing buildings has become a key focus for both public and private stakeholders. Older structures often face issues such as water leakage, roof damage, foundation cracks, and poor thermal performance-problems that can be effectively addressed through the application of LAMs. These membranes are especially well-suited for refurbishment projects due to their seamless application, ability to conform to irregular surfaces, and compatibility with various substrates, including aged concrete, brick, and metal.

One of the main advantages of LAMs in refurbishment is their ease of use without requiring the complete removal of the existing system. This not only reduces labor costs but also minimizes disruption in occupied spaces such as residential buildings, schools, hospitals, and commercial establishments. In urban environments where space constraints and building accessibility pose challenges, LAMs provide a practical solution that can be applied vertically or horizontally with minimal equipment. Their elastomeric properties allow them to accommodate structural movement and seal existing cracks, extending the lifespan of the building envelope. Additionally, many government programs in Europe, North America, and Asia are incentivizing energy efficiency and water resistance upgrades in existing buildings. Regulations encouraging sustainable building practices and green certification are further propelling the use of high-performance waterproofing systems like LAMs during renovation. Liquid-applied membranes also align with modern aesthetic and environmental standards, offering low-VOC, environmentally safe formulations.

"Asia Pacific is projected to be the largest market for liquid-applied membrane during the forecast period."

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Asia Pacific stands as the largest region in the liquid-applied membrane (LAM) market, driven by a powerful combination of rapid urbanization, industrialization, rising infrastructure investments, and strong governmental support for construction and development projects. The region's dominance is primarily fueled by major economies like China, India, Japan, South Korea, and Southeast Asian countries, each contributing through large-scale residential, commercial, and infrastructure construction activities. One of the most defining growth drivers is the massive construction boom underway in India and China. In India, the construction sector is a cornerstone of economic development, propelled by ambitious public and private sector projects in housing, transportation, and urban infrastructure. Initiatives such as the Pradhan Mantri Awas Yojana-Urban (PMAY-U), Smart Cities Mission, and rising capital expenditure in logistics, warehousing, and real estate are significantly increasing the demand for high-performance waterproofing materials like liquid-applied membranes. The sector's push towards sustainability and green buildings is further encouraging the use of advanced LAM systems that align with environmental standards.

In China, the government's 14th Five-Year Plan emphasizes new infrastructure in areas like transportation, energy, water systems, and green urbanization. The country is also pushing for extensive building retrofits and the development of energy-efficient and net-zero buildings, creating robust opportunities for LAM usage in both new constructions and refurbishments. Additionally, rising industrial activity, urban redevelopment, and commercial expansions continue to add to LAM demand in key urban clusters like Shanghai, Beijing, and Guangzhou. Moreover, the region's growing awareness of energy efficiency, water management, and climate resilience is encouraging developers and governments to adopt advanced waterproofing technologies. With labor costs being comparatively lower and land availability continuing to shrink in urban cores, there is a strong shift toward efficient, easy-to-apply systems like LAMs, especially in retrofitting existing structures.

Extensive primary interviews were conducted to determine and verify the market size for several segments and sub-segments, and the information was gathered through secondary research.

The breakdown of primary interviews is given below:

□ By Department: Tier 1: 40%, Tier 2: 25%, and Tier 3: 35%

□ By Designation: C Level: 35%, Director Level: 30%, and Executives: 35%

□ By Region: North America: 25%, Europe: 35%, Asia Pacific: 30%, South America: 5%, Middle East & Africa 5%

Sika AG (Switzerland), Mapei S.P.A. (Italy), Soprema (France), Fosroc, Inc (UAE), Saint-Gobain Weber (France), H.B. Fuller (US), Wacker Chemie AG (Germany), Johns Manville (US), Bostik (France), GCP Applied Technologies (US), Ardex (Germany), Renolit SE (Germany), GAF, Inc. (US), Pidilite (India), and Tremco (US). among others are some of the key players in the liquid-applied membrane market.

The study includes an in-depth competitive analysis of these key players in the authentication and brand protection market, with their company profiles, recent developments, and key market strategies.

Research Coverage

The market study covers the liquid-applied membrane market across various segments. It aims to estimate the market size and the growth potential of this market across different segments based on type, application, usage, end-use industry, and region. The study also includes an in-depth competitive analysis of key players in the market, their company profiles, key observations related to their products and business offerings, recent developments undertaken by them, and key growth strategies adopted by them to improve their position in the liquid-applied membrane market.

Key Benefits of Buying the Report

The report is expected to help the market leaders/new entrants in this market share the closest approximations of the revenue numbers of the overall liquid-applied membrane market and its segments and sub-segments. This report is projected to help stakeholders understand the competitive landscape of the market, gain insights to improve the position of their businesses, and plan suitable go-to-market strategies. The report also aims to help stakeholders understand the pulse of the market and provide them with information on the key market drivers, restraints, challenges, and opportunities.

The report provides insights into the following points:

? Analysis of key drivers (Expanding construction industry, rising renovation and refurbishment activities), restraints (Requirements of skilled labor), opportunities (Growth in emerging markets), and challenges (Environmental & health concerns related to liquid-applied membranes)

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? Market Development: Comprehensive information about lucrative markets ? the report analyzes the liquid-applied membrane market across varied regions

? Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the liquid-applied membrane market

? Competitive Assessment: In-depth assessment of market shares, growth strategies, product and service offerings of leading players like Sika AG (Switzerland), Mapei S.P.A. (Italy), Soprema (France), Fosroc, Inc (UAE), Saint-Gobain Weber (France), H.B. Fuller (US), Wacker Chemie AG (Germany), Johns Manville (US), Bostik (France), GCP Applied Technologies (US), Ardex (Germany), Renolit SE (Germany), GAF, Inc. (US), Pidilite(India), and Tremco (US) among others.

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