

## **Australia Waterproofing Membrane Market Size and Share - Outlook Report, Forecast Trends and Growth Analysis (2025-2034)**

Market Report | 2025-10-25 | 117 pages | EMR Inc.

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### **Report description:**

Australia Waterproofing Membrane Market Insights- According to the International Trade Administration, the Australian construction sector's annual contribution of AUD 257 billion fuels the demand for high-quality waterproofing membrane solutions, as the sector's growth accelerates the need for durable, water-resistant materials to protect structures from water damage, subsequently driving market expansion for advanced waterproofing technologies.- The Australian Bureau of Statistics reported a 19.4% increase in new residential construction in January 2024, totalling AUD 7.14 billion, which directly correlates with a surge in demand for waterproofing membranes, as the rising number of new homes necessitates effective moisture protection to enhance long-term durability and property value.- The AUD 4.92 billion value of non-residential building approvals in January 2024 is driving increased demand for advanced waterproofing systems, as commercial and industrial projects require durable solutions to prevent water ingress, safeguard structural integrity, and reduce long-term maintenance costs, thereby supporting the growth of high-performance membrane adoption.- The waterproofing membrane market in Queensland is expected to grow at a rate of 20.70% from 2025 to 2034.Key Trends and DevelopmentsThe Australia waterproofing membrane market is expanding, driven by sustainable solutions, rising demand for liquid-applied membranes (LAMs), greater use of TPO and PVC membranes, and the emergence of smart waterproofing technologies. February 2025: BASF's high-performance CONIROOF waterproofing membranes were applied to the Spirit of Tasmania I and II to combat harsh marine conditions. A multi-stage process, including primers, adhesive tape, spray membrane, and topcoat, ensured long-term durability. TT-Line implemented this as part of scheduled maintenance to prevent water ingress and preserve vessel integrity. February 2024 : The upcoming NCC 2025 announced updated waterproofing provisions to reduce defects in Australian buildings. Developed with industry and regulatory input, the changes aimed to improve clarity around performance standards and deemed-to-satisfy requirements, enhancing protection against both surface and sub-surface water ingress and improving overall construction quality. Sustainable Waterproofing Solutions is Boosting the Australia Waterproofing Membrane Market Growth The shift towards sustainable construction practices is driving demand for waterproofing membranes made from renewable or recycled materials. These eco-conscious solutions support compliance with international green building standards such as LEED and Green Star. Market growth is underpinned by regulatory pressures and heightened environmental awareness, positioning sustainable membranes as a key differentiator in construction

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material procurement. Growth in Liquid-Applied Membranes (LAMs) is Boosting the Opportunities in the Australia Waterproofing Membrane Market The increasing preference for liquid-applied membranes is reshaping the waterproofing segment. Their ability to form a continuous, joint-free barrier over irregular surfaces enhances application efficiency and performance. Ideal for complex architectural designs, LAMs offer high elasticity and resilience, supporting their adoption in both residential and commercial developments amid rising demands for durable and versatile waterproofing systems. Increasing Adoption of TPO and PVC Membranes is Driving the Demand of the Australia Waterproofing Membrane Market Thermoplastic polyolefin (TPO) and polyvinyl chloride (PVC) membranes are witnessing increased uptake due to their robust UV resistance, thermal reflectivity, and cost-efficiency. TPO contributes to energy savings by reflecting solar radiation, aligning with building energy efficiency goals. These membranes are increasingly specified in both new-build and retrofit projects across various climatic regions. Emergence of Smart Waterproofing Technologies is Impacting the Australia Waterproofing Membrane Market Revenue Technological innovation is introducing advanced waterproofing membranes equipped with self-healing materials and embedded sensors. These smart solutions enable continuous monitoring and predictive maintenance, reducing long-term infrastructure risks. By enhancing system performance and lifecycle management, such technologies are becoming a strategic investment focus in high-value construction and infrastructure projects worldwide.

**Australia Waterproofing Membrane Market Overview**The growth of the Australia waterproofing membrane market is largely driven by the increasing need for solutions that enhance the durability of buildings by protecting them from water damage. Waterproofing membranes ensure the structural integrity of buildings by preventing moisture penetration, which can lead to long-term damage. Their ability to significantly reduce repair costs, prevent mould growth, and improve indoor air quality further boosts demand. Government investments, such as the 2023-24 Federal Budget focusing on enhancing Australia's AUD 90 billion infrastructure pipeline, particularly in urban areas, have further supported the demand for waterproofing solutions.

**Opportunities in the Australia waterproofing membrane market** are further propelled by the membranes' role in promoting energy efficiency by stabilising indoor temperatures and reducing moisture-related energy loss. These solutions also support environmental sustainability by mitigating water runoff. Their versatility allows for applications across various sectors, including basements, roofs, and decks, while easy installation helps minimise construction downtime, further driving the growth of the Australia construction market.

**Australia Waterproofing Membrane Market Growth**The demand of the Australia waterproofing membrane market is experiencing growth, driven by the increasing adoption of UV-resistant membranes, which extend product lifespan and performance. These membranes enhance energy efficiency by regulating indoor temperatures through moisture blockage. Additionally, chemical-resistant variants offer increased durability. Waterproofing membranes are integral to sustainable construction by improving safety, preventing water infiltration that could compromise building materials. The National Construction Code (NCC) revisions in May 2022, mandating complete waterproofing of shower walls and new gradient requirements for surface finishes, have further reinforced the demand for compliant solutions, particularly in commercial wet areas.

The Australia waterproofing membrane market revenue is impacted by the membranes' ability to meet local building codes, ensuring compliance with updated regulations. These membranes protect foundations from water-related damage, preventing structural issues such as cracks. By enhancing the longevity and value of properties, waterproofing solutions offer a high return on investment.

**Australia Waterproofing Membrane Market Trends**The Australia waterproofing membrane market dynamics and trends are being significantly driven by technological advancements and product innovations. Manufacturers are focusing on developing high-performance membranes with enhanced durability, extended lifespans, and improved resistance to environmental factors such as UV rays, extreme temperatures, and chemicals. Innovative solutions, including self-healing membranes and breathable membranes, are becoming increasingly popular for their ability to automatically repair damage and allow moisture to escape. These developments boost the effectiveness of waterproofing systems and align with the growing demand for advanced solutions. Australia allocates AUD 10 billion annually towards water and wastewater treatment, thus, stimulating the need for advanced waterproofing technologies to protect critical infrastructure.

The continued expansion of both residential and commercial construction in Australia is a key driver for the growth of the Australia waterproofing membrane market. With increasing demand for new housing and commercial spaces, the need for robust waterproofing solutions has surged. According to the Australian Bureau of Statistics, new private sector house commencements increased by 1.7% to 25,732 dwellings in June 2024, contributing to market growth. □As infrastructure investments grow, especially in cities like Sydney and Melbourne, developers and builders are recognising the necessity of high-quality waterproofing solutions, further driving demand for advanced membrane products.

**Opportunities in the Australia Waterproofing Membrane Market**A significant trend in the Australia

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waterproofing membrane market is the growing trend towards renovation and retrofitting projects. Older properties, particularly those with outdated waterproofing systems, are increasingly being upgraded to improve water resistance and energy efficiency. This shift is aligned with the broader emphasis on extending the lifespan of existing buildings. According to the Department of Home Affairs, 3,818,495 visitor visas were issued in 2022-23, marking a rise of 2,686,605 from the previous year. This tourism growth has led to higher demand for short-term rental properties, further driving the adoption of advanced waterproofing solutions to enhance building performance, sustainability, and comfort.

**Market Restraints**The Australia waterproofing membrane market faces several constraints, including the high upfront cost of premium products, which deters budget-conscious consumers. The complexity of installation, requiring skilled labour, restricts adoption, particularly in remote areas. Environmental concerns surrounding chemical components, such as VOCs, and disposal practices also hinder market expansion. Furthermore, limited consumer awareness, particularly in smaller-scale projects, as well as reliance on weather conditions during application, presents additional barriers. Increased competition from alternative solutions like liquid-applied membranes, regulatory challenges, and the presence of low-cost, lower-quality imports further challenge local manufacturers and impede sector growth.

□Australia Waterproofing Membrane Market Report and Forecast 2025-2034□ offers a detailed analysis of the market based on the following segments:

**Market Breakup by Raw Material-** Modified Bitumen- PVC- TPO- LDPE- Others

**Market Breakup by Type-** Cold Liquid-applied Membranes- Hot Liquid-applied Membranes- Fully Adhered Sheets- Loose Laid Sheets

**Market Breakup by Application-** Roofing and Walls- Water and Waste Management- Building Structures- Tunnel Liners- Bridges and Highways- Others

**Market Breakup by Region-** New South Wales- Victoria- Queensland- Australian Capital Territory- Western Australia- Others

**Australia Waterproofing Membrane Market Share Market Analysis by Raw Material** According to the Australia waterproofing membrane market report, modified bitumen membranes are leading the market as demand grows for cost-effective, long-lasting waterproofing solutions in both new construction and retrofit projects. Their ability to perform reliably under Australia's varied climate conditions is driving adoption, particularly in commercial and infrastructure applications where durability, ease of installation, and compatibility with a wide range of substrates are critical. Bitumen, predominantly produced by Viva Energy at its Geelong Refinery, the only bitumen manufacturer in Australia, supports the waterproofing sector by providing reliable, cost-effective, and high-performance solutions for both residential and commercial applications.

The Australia waterproofing membrane market is further boosted by the growing adoption of PVC membranes, known for their superior resistance to water, chemicals, and UV degradation. Endorsed by the Vinyl Council of Australia for their sustainable production and environmental benefits, PVC membranes improve energy efficiency by reducing heating and cooling costs, making them both cost-effective and eco-friendly. Their recyclability aligns with the increasing demand for sustainable construction solutions.

**Market Analysis by Type** According to the Australia waterproofing membrane industry report, hot liquid-applied membranes are leading the market, driven by their robust durability and ability to withstand extreme weather conditions, making them particularly well-suited for Australia's harsh climate. These membranes provide continuous, seamless coatings that offer long-lasting waterproofing protection, making them ideal for large-scale construction projects. Brands like ARDEX, with their "WeldTec" series, are gaining prominence for their superior heat resistance and UV stability, which make them particularly beneficial for exposed areas.

The Australia □waterproofing membrane market is also seeing a surge in demand for cold liquid-applied membranes are gaining traction in the Australia waterproofing market due to rising demand for safer, faster, and more flexible installation methods, especially in urban and occupied spaces where flame-free applications are essential. Their seamless finish significantly reduces leak risks, while high elasticity and movement accommodation make them ideal for structures exposed to dynamic stresses, such as rooftops and complex architectural designs. As builders and contractors prioritise labour efficiency, safety compliance, and performance longevity, these membranes are increasingly preferred in both new builds and refurbishment projects across commercial and infrastructure segments.

**Market Analysis by Application** Opportunities in the Australia waterproofing membrane market are expanding, particularly within water and waste management systems, where these membranes play a critical role in preventing leaks and ensuring the effective containment of water and waste. The membranes significantly enhance infrastructure longevity, reduce maintenance costs, and help safeguard the environment.

The Australia waterproofing membrane market is also driven by the growing demand for protective solutions in infrastructure such as bridges and highways. These membranes prevent water infiltration, reducing corrosion risks and structural damage, while extending the lifespan of vital infrastructure. In Australia's diverse climate, waterproofing membranes protect against moisture, chemicals, and extreme temperatures. According to the Australian government, the total paved road length in the country was estimated at 427,000 kilometres in 2022, highlighting the

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substantial potential for waterproofing solutions to improve infrastructure resilience and reduce long-term maintenance costs. Australia Waterproofing Membrane Market Regional Insights New South Wales Waterproofing Membrane Market Regional Insights The New South Wales waterproofing membrane market is benefiting from a surge in construction activity, which is increasing the demand for waterproofing solutions. These membranes help to improve durability and protect buildings from water damage, extending their lifespan and boosting property value. The 2023 NSW Budget allocated AUD 23 billion for infrastructure projects, with a particular focus on transport and housing to manage population growth and enhance regional connectivity. Queensland Waterproofing Membrane Market Trends Queensland's market is seeing growth due to rising construction and renovation, especially in coastal areas. Waterproofing membranes offer protection from extreme weather and moisture damage, improving structural integrity and reducing maintenance costs. The Australian government's 2024/25 budget outlines AUD 21.6 billion for Queensland's Infrastructure Investment Program over the next decade, supporting major road, rail, and smaller projects. Western Australia Waterproofing Membrane Market Dynamics Western Australia waterproofing membrane market is expanding due to sustained investment in infrastructure development and harsh environmental conditions that necessitate advanced moisture protection. Large-scale public works, including transport, energy, and utility upgrades, are driving demand for high-performance membranes to ensure durability and reduce long-term repair costs. Additionally, the region's exposure to heavy rainfall and variable temperatures is increasing the need for reliable waterproofing solutions in both civil and commercial construction projects. Victoria Waterproofing Membrane Market Drivers Victoria waterproofing membrane market experienced growth driven by robust infrastructure development and stringent building regulations. The state's commitment to sustainable construction practices and adherence to environmental standards further propelled demand. Additionally, the increasing prevalence of extreme weather events heightened the need for durable and reliable waterproofing solutions, positioning Victoria as a key market for membrane applications. Australian Capital Territory Waterproofing Membrane Market Opportunities The ACT's waterproofing membrane market expanded due to significant urban development and a focus on resilient infrastructure. Government initiatives promoting green building certifications and compliance with national standards encouraged the adoption of advanced waterproofing technologies. Furthermore, the region's proactive approach to climate adaptation and water management underscored the importance of high-performance membrane solutions in construction projects. Competitive Landscape Key players in the Australia waterproofing membrane market are driving innovation in concrete, waterproofing, and building materials. These companies focus on delivering high-performance, sustainable solutions to enhance the durability and longevity of construction projects. By offering a comprehensive range of products, including advanced waterproofing membranes, admixtures, and concrete curing agents, they aim to meet the industry's evolving needs. Their ongoing investment in research and development ensures that they remain at the forefront of technological advancements and cater to the increasing demand for durable, efficient building solutions. Key Industry Players Bostik Australia Pty. Ltd.: It was established in 1960 and is headquartered in Sydney, Australia. The company specialises in innovative adhesive solutions for a range of industries, including construction, automotive, and packaging. Bostik provides durable waterproofing products and solutions to the Australian market, contributing to infrastructure and building projects. Concrete Durability and Waterproofing Solutions Pty Ltd: Founded in 2008, and based in Sydney, Australia, the company offers high-performance waterproofing systems and concrete protection solutions. Their products are designed to improve the durability and integrity of construction projects, particularly in the commercial and residential sectors across Australia. GCP Applied Technologies Inc.: GCP Applied Technologies was established in 2016 and has a significant presence in Australia with its headquarters in Massachusetts, United States. The company specialises in construction chemicals, including waterproofing membranes, admixtures, and other building materials. GCP's innovative products help improve the performance and sustainability of construction projects in Australia. Mapei Australia Pty Ltd: Mapei was founded in 1986, and is headquartered in Melbourne, Australia. The company provides a range of products for construction, including waterproofing membranes, adhesives, and chemical solutions. Mapei's focus is on creating high-performance, sustainable materials that support the durability and efficiency of construction and renovation projects. Other key players in the Australia waterproofing membrane market report are Soprema Australia Pty Ltd, Sika Australia Pty Ltd, Fatra Australia, and Waterproofing Technologies Pty Ltd, among others.

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