

Waterproof Materials in Japan: Key Research Findings 2017

◆ Research Outline

Yano Research Institute has conducted a research on the domestic waterproof materials market with the following conditions:

1. Research period: January to March, 2017
2. Research target: Waterproof material makers, companies in the waterproof material business, and related industrial organizations
3. Research methodologies: Face-to-face interviews by the expert researchers, surveys via telephone/email, and literature research

<What are Waterproof Materials? >

The waterproof materials in this research indicate the following materials/fabrics and manufacturing methods (note that water-blocking sheets made by those companies engaged solely in civil-engineering, or siliceous coatings are not included):

- Asphalt-base waterproof materials: asphalt, modified asphalt (with the methods of heated, normal temperature, and torch applied)
- Waterproof Sheet Materials: vulcanized rubber sheets, non-vulcanized rubber sheets, PVC sheets, ethylene-vinyl acetate (EVA) sheets, polyethylene sheets, urethane sheets, and TPE/TPO based sheets
- Coating Film Waterproof Materials: urethane, FRP, polymer-modified cement waterproofing (i.e., the mixture of EVA and acrylic + cement), acrylic, other resins and synthetic rubbers, rubber-modified asphalt, and exterior coating film decorative waterproof materials (acrylic rubber, 1 liquid urethane)

<What are Under Roofing Materials?>

Under roofing materials in this research indicate sloping roofs of newly-built houses, mainly asphalt-based or modified asphalt-based roofing materials used for clay roof tiles/cement-based roofing materials/roof shingle materials for other types of buildings.

◆ Key Findings

- **Waterproof Materials Market for FY2016 Prospected to Decline to 80.01 Million m², 97.7% on Y-o-Y Basis, While Under Roofing Materials Market Rose to 82.27 Million m², 101.7% on Y-o-Y Basis**

The domestic waterproof materials market from FY2014 to FY2016 has continued to be on the decline due to aftereffect of surge in demand just before the consumption tax increase, and influence from over-consumption in advance. Size of the domestic waterproof materials market in FY2016, based on the floor area for construction, is likely to decline to 80,009 thousand m², 97.7% of the size of the previous fiscal year. On the other hand, the under roofing materials market has shifted to be slightly on the rise since FY2016. Size of the under roofing materials market is projected to achieve 82,267 thousand m², 101.7% of the size of the preceding fiscal year, based on the sales volume at manufacturers.

■ **With Rising Number of Construction that Used to be Restrained, Waterproof Materials Market for FY2017 Projected to Reach 81.21 Million m², 101.5% on Y-o-Y Basis**

The domestic waterproof materials market seems to hit the bottom of declining tendency by the latter half of FY2016, and the number of constructions that have once been restrained is likely to turn for the better by FY2017, which is expected to raise the market size slightly. The domestic waterproof materials market for FY2017, based on the floor area for construction, is likely to achieve 81,209 thousand m², 101.5% of the size of the previous fiscal year, whereas the under roofing materials market is projected to reach 82,680 thousand m², 100.5% of the size of the preceding fiscal year, based on the sales volume at manufacturers.

◆ **Report Format**

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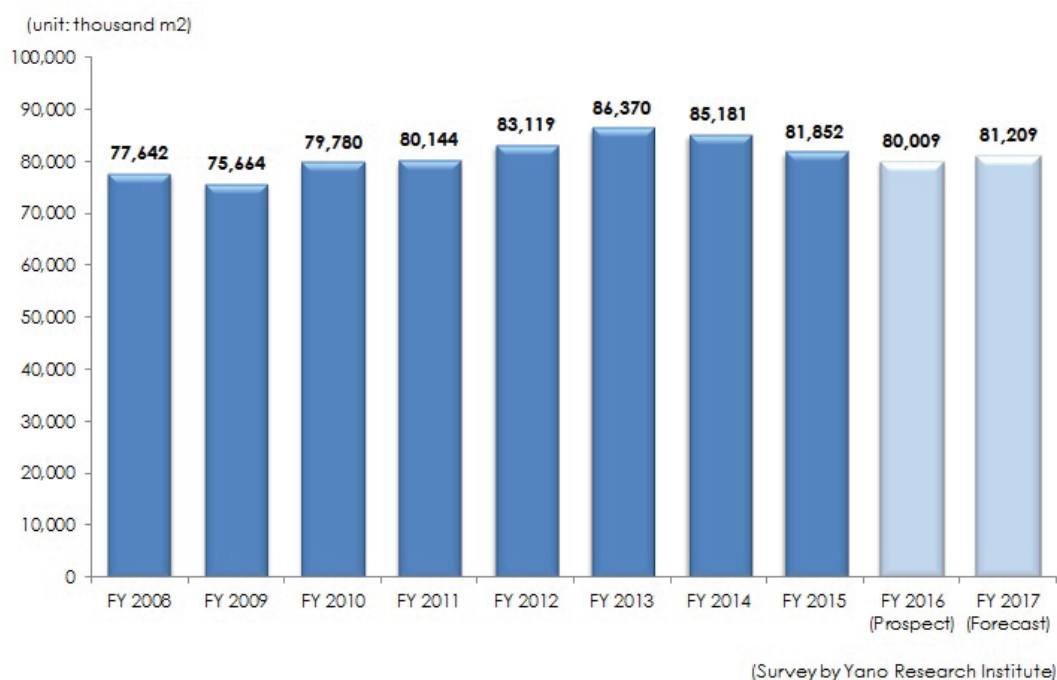
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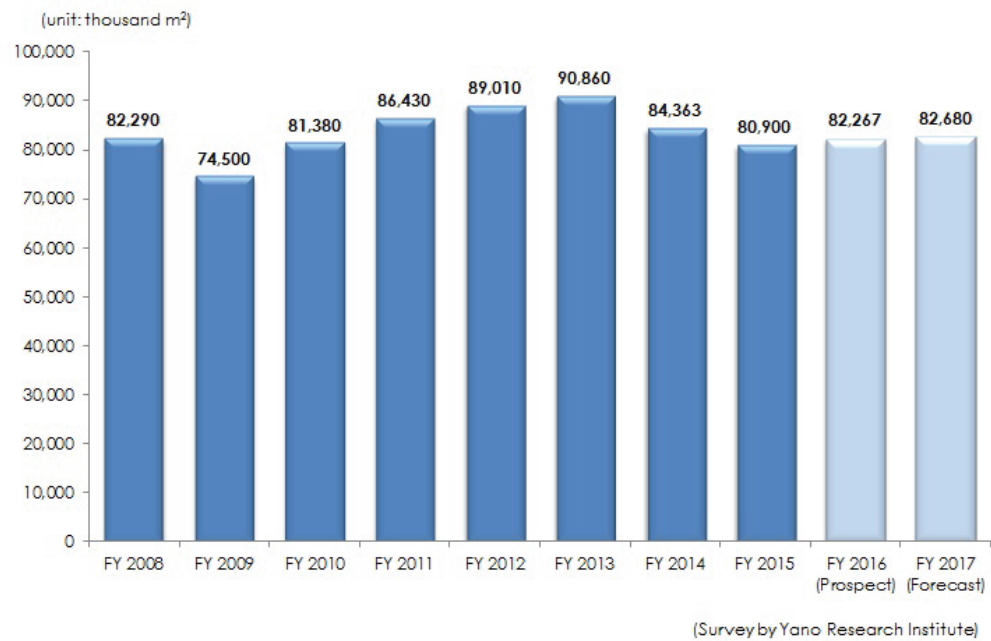
■ **Figure 1: Transition and Forecast of Waterproof Materials Market Size**



Notes:

1. The market size is based on the floor area for construction.
2. This research has targeted those waterproof materials that are asphalt-based, waterproof sheet materials, and coating film waterproof materials.
3. Note that water-blocking sheets made by those companies engaged solely in civil-engineering, or siliceous coatings are not included

■ **Figure 2: Transition and Forecast of Under Roofing Materials Market Size**



Notes:

4. The market size is based on the sales volume at the manufacturers.