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# Green Roofing: United States

January 2022



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# About This Report

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## Scope

This report forecasts to 2025 US green (vegetative) roofing demand in nominal US dollars at the manufacturer level. Total demand is segmented by system in terms of:

- extensive
- semi-intensive
- intensive

Total demand is also segmented by market as follows:

- new construction
- retrofit

To illustrate historical trends, total demand is provided in annual series from 2010 to 2020; the various segments are reported at five-year intervals for 2010, 2015, and 2020.

Data are presented at the manufacturer level and exclude the value of mark-ups or installation. Demand also excludes the value of existing components (e.g., waterproof membrane, insulation) that are not replaced and installed as part of the new vegetative roof assembly. For roofs that are partially covered by vegetative roofing, only the area of green roof coverage is included in the scope of this report. Other exclusions include rooftop container gardens, living walls and vegetative building façades, decorative rooftop elements (e.g., pavers, edging), and separately sold sprinkler systems.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Green Roofing: United States* (FF60123) is based on [Green \(Vegetative\) Roofing](#), a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental organizations
- trade associations and their publications
- the business and trade press

- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

**Table 4 | NAICS & SIC Codes Related to Green Roofing**

NAICS/SCIAN 2017 North American Industry Classification System		SIC Standard Industrial Classification	
111421	Nursery & Trees Production	0181	Ornamental Nursery Products
238160	Roofing Contractors	1761	Roofing, Siding, & Sheet Metal Work
324122	Asphalt Shingle & Coating Materials Manufacturing	2851	Paints & Allied Products
325510	Paint & Coating Manufacturing	2952	Asphalt Felts & Coatings
326150	Urethane & Other Foam Product (except Polystyrene) Manufacturing	3069	Fabricated Rubber Products, NEC
326299	All Other Rubber Product Manufacturing	3086	Plastic Foam Products
327390	Other Concrete Product Manufacturing	3272	Concrete Products, NEC
327991	Cut Stone & Stone Product Manufacturing	3281	Cut Stone & Stone Products
423330	Roofing, Siding, & Insulation Material Merchant Wholesalers	5033	Roofing, Siding, & Insulation

Source: US Census Bureau

## Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

## Copyright & Licensing

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## Resources

### The Freedonia Group

*Green (Vegetative) Roofing*

### Freedonia Industry Studies

*Ceilings*

*Fiber Cement in the US*

*Global Ceilings*

*Global Fiber Cement*

*Global Foamed Plastic Insulation*

*Global Housing*

*Global Insulation*

*Global Power Tools*

*Global Roofing*

*Global Siding (Cladding)*

*Global Thermoplastic Elastomers*

*Global Windows & Doors*

*Gutters & Downspouts*

*Insulation*

*Liquid-Applied Roof Coatings*

*Lumber*

*Moulding & Trim*

*Prefabricated Housing*

*Siding*

*Windows & Doors*

### Freedonia Focus Reports

*Commercial Roofing: United States*

*Construction: United States*

*Landscaping Products: United States*

*Low-Slope Roofing: United States*

*Roofing: United States*

### Freedonia Custom Research

### Trade Publications

*Builder*

*Buildings*

*Buildinggreen.com*

*Engineering News-Record*

*Environmental Building News*

*Greenroofs.com*

*Green Roof Technology*

*Journal of Light Construction*

*Livingroofs.org*

*Remodeling*

*Roofing Contractor*

## **Agencies & Associations**

Asphalt Roofing Manufacturers Association

Cool Roof Rating Council

EPDM Roofing Association

Home Innovation Research Labs

Metal Building Manufacturers Association

Metal Construction Association

Metal Roofing Alliance

National Association of Home Builders

National Roofing Contractors Association

Spray Polyurethane Foam Alliance

United States Census Bureau

United States Department of Energy

United States Environmental Protection Agency

United States Green Building Council

United States International Trade Commission