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Global Cool Roofs Market - 2025 -2032

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Abstracts

Cool Roofs Market Overview

Cool Roofs Market reached US$ 23.12 billion in 2024 and is expected to reach US$ 41.23 billion by 2032, growing with a CAGR of 7.50% during the forecast period 2025-2032.

Global uptake of cool roofs is accelerating, driven by government-led programs and institutional support. Reflective roofs can stay over 50°F cooler than conventional roofs, significantly reducing building energy use. In air-conditioned homes, peak cooling demand drops by 11–27% with cool roof installation. Indonesia’s implementation of over 1.1 million m? of cool roofs covering 250,000 households demonstrates growing global momentum, with production costs expected to decline as local manufacturing expands. Additionally, over 850 certified products are now available through official rating councils, supporting standardized adoption and scaling.

Cool Roofs Market Trend

A key trend in the global cool roof market is the transition from small-scale projects to large-scale institutional adoption. In Indonesia, cool roof deployment created more than 100 local jobs and led to a roughly 20% cost reduction through localized production. The integration of international funding and local capacity building is proving highly effective in scaling these solutions. In the US, federal directives and national rating programs have institutionalized cool roofs across building codes. These efforts collectively highlight a global trend of governments promoting affordability, regulation, and scalability in the cool roofing sector.

Cool Roofs Market Dynamics

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Climate Change and Urban Heat Island Mitigation

Climate change and urban heat island (UHI) effects are among the most significant drivers propelling the global cool roofs market. As global temperatures rise, cities are experiencing disproportionately higher heat levels due to dense infrastructure, dark surfaces, and limited vegetation, which contribute to the UHI effect. A recent study by the Indian Institute of Technology Bhubaneswar, India, reveals that urbanization has caused nearly 60% more night-time warming in over 140 major Indian cities compared to surrounding rural areas.

Cool roofs, designed to reflect more sunlight and absorb less heat, offer a practical and scalable solution to mitigate these impacts. In urban areas, widespread adoption of cool roofs can significantly lower ambient temperatures, reducing energy demand for air conditioning and enhancing public health by decreasing heat-related illnesses and mortality.

Municipal governments and environmental agencies are recognizing this benefit and increasingly incorporating cool roofing requirements into climate action plans and green building codes. Programs such as New York City’s Cool Roof Initiative this policy shift. Similarly, in India, Telangana has launched India’s first Cool Roof Policy (2023-2028) to make the state more heat resilient by mandating the use of cool roofing materials like solar reflective paints, tiles, and sheets. The five-year policy, effective from April 1, 2023, aims to cover 300 square kilometers of roof area, primarily in Hyderabad and other urban areas. The initiative is designed to address rising temperatures proactively, with the policy’s timing chosen to emphasize its importance during the summer months.

Moreover, climate resilience has become a core component of urban planning, with cool roofs offering an effective strategy for both mitigation and adaptation. As cities aim to reduce greenhouse gas emissions and combat extreme heat events, cool roofing solutions are being adopted as part of comprehensive climate resilience strategies.

High Initial Costs

High initial costs, ranging from USD 0.60 to 1.30 per sq. ft., are a major barrier to the adoption of cool roofs, especially when compared to basic alternatives like lime wash (USD 0.07/ft?). Despite proven benefits like 5%–14% HVAC energy savings, many building owners hesitate due to 2–3-year payback periods. India's ECBC mandates reflectivity but offers no direct financial support, limiting adoption. Without subsidies or incentives, the market struggles to scale despite rising heat stress.

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Cool Roofs Market Segment Analysis

The global cool roofs market is segmented based on roof type, product, reflective coatings, end-user and region.

Steep-Slope Segment Driving Cool Roofs Market

The steep-slope roofs segment of the cool roofs market is experiencing growing demand, particularly in residential construction, due to structural advantages and increasing energy efficiency mandates. Steep-slope roofs, common in homes, are designed to allow efficient drainage of rain and snow, reducing the potential for water damage, mold, and algae buildup making them ideal for integration with reflective roofing materials.

According to the US Department of Energy (DOE), cool roofing systems particularly in residential applications can reduce annual air conditioning energy use by up to 15%. In regions with hot climates, such as the southern US, the energy and cost savings are even more pronounced when cool roof technology is applied to sloped asphalt shingle roofs.

Regulatory actions have been a significant catalyst for adoption. California's Title 24 Building Energy Efficiency Standards, implemented by the California Energy Commission, require certain minimum levels of solar reflectance and thermal emittance for roofing materials used in both low-slope and steep-slope applications. In climate zones 10–15, these standards have led to widespread installation of "cool-colored" roofing materials, especially for steep-slope roofs on residential buildings. The US Environmental Protection Agency (EPA), through its ENERGY STAR program, recognizes steep-slope roofing materials (like reflective shingles and tiles) that meet energy efficiency guidelines.

Additionally, the Internal Revenue Service (IRS) has supported adoption through federal tax credits under the Inflation Reduction Act, offering up to 30% credit for qualified energy-efficient home improvements including reflective roofing materials used in steep-slope residential installations.

Cool Roofs Market Geographical Share

Asia-Pacific Drives the Global Cool Roofs Market

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The demand for cool roofs across the Asia-Pacific region is rising steadily, driven by urgent climate adaptation needs, rapid urbanization, and government-led sustainability initiatives. Countries including India, Singapore, Japan, China, Malaysia, and the Philippines are adopting cool roofing systems to reduce urban heat island effects and lower energy consumption in residential and commercial buildings. In India, the government and municipal bodies have taken major steps. The Telangana Cool Roof Policy (2023) mandates cool roofs for large buildings and aims to cover 300 square kilometers by 2030. The initiative is projected to save 600 GWh of electricity annually and cut 30 million tons of carbon emissions over five years. Cities like Ahmedabad and Hyderabad have also adopted cool roof programs under their Heat Action Plans, targeting low-income neighborhoods and demonstrating measurable indoor cooling benefits of 2–5°C with basic reflective coatings.

In Singapore, the Building and Construction Authority (BCA) promotes energy-efficient building materials under its Green Building Masterplan, which aims to green 80% of all buildings by 2030. Cool roofs are integrated into this strategy as a passive cooling technology.

China has incorporated cool roofing into broader green building guidelines under its Three-Star Green Building Rating System. Major urban centers such as Shanghai and Beijing are increasingly adopting reflective roofing materials as part of low-carbon city frameworks.

These diverse programs across the region reflect growing governmental recognition of cool roofs as a critical climate adaptation and energy-saving strategy in Asia-Pacific.

Sustainability Analysis

The global cool roof market is increasingly recognized for its sustainability benefits, contributing to energy efficiency, climate resilience, and emissions reduction. Cool roofs, designed to reflect more sunlight and absorb less heat, play a pivotal role in mitigating urban heat islands and reducing cooling energy demands.

According to the US Department of Energy, cool roofs can significantly lower building temperatures, reducing the need for air conditioning and, consequently, energy consumption. This decrease in energy use leads to a reduction in greenhouse gas emissions associated with electricity generation.

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The Environmental Protection Agency (EPA) highlights that widespread adoption of cool roofs can mitigate the urban heat island effect, leading to improved air quality and reduced heat-related health issues.

Internationally, initiatives like the Million Cool Roofs Challenge have demonstrated the effectiveness of cool roofs in various climates. This program led to the installation of over 1.1 million square meters of cool roofs across multiple countries, resulting in indoor temperature reductions of up to 10°C and creating sustainable job opportunities. In India, the state of Telangana's Cool Roof Policy aims to cover 300 square kilometers with cool roofs by 2028, projecting annual energy savings of 600 GWh and a cumulative reduction of 30 million tons of carbon dioxide emissions over five years.

Cool Roofs Market Major Players

The major global players in the market include Sika AG, The Dow Chemical Company, GAF Materials LLC, The Sherwin-Williams Company, Nippon Paint Holdings Co., Ltd., Akzo Nobel N.V., Nutech Paint Pty Ltd, PPG Industries, Inc., Gaco Western LLC, and BASF SE.

Key Developments

In April 2025, Kerala became the second Indian state after Telangana to introduce a cool roof policy aimed at reducing heat stress. The policy empowers local self-government institutions (LSGIs) to implement reflective roofing solutions that enhance indoor cooling and support climate resilience.

The government of Telangana officially launched the Cool roofs policy in April 2023, an important milestone for the states and a promising step forward in scaling up this low-cost, passive cooling solution for strengthening extreme heat resilience across the country.

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