



Final Report Green Roof Industry Survey 2006



Green Roofs For Healthy Cities

April 2007





Introduction – Organizational Background

Green Roofs for Healthy Cities – North America Inc. is a not-for-profit membership-based industry association whose mission is to further the development of the green roof infrastructure industry. The Association is holding its 5th Annual Conference in Minneapolis from April 29th to May 1st, 2007, where experts from around the world will gather to network and share information on new policy development, designs, research results and products and services. The conference is being co-hosted by the City of Minneapolis and will be held at the Hyatt Regency Minneapolis Hotel. Media passes are available. See www.greenroofs.org/minneapolis for details.

Green Roofs for Healthy Cities has over 3,000 Corporate and Individual Members. The Association is implementing an *Accredited “Green Roof Professional” Program* for green roof designers and installers and delivers training courses throughout North America. This program will help to ensure higher quality green roof design and construction practices.

Green Roofs for Healthy Cities has a *Local Market Development Program* through which it works with a wide variety of policy makers to develop research, policies and programs in support of widespread green roof implementation. This program has been implemented in over 23 cities to date and has resulted in significant improvements in the level of awareness, technical performance, research, economic valuation research and policy support.

Survey Background

In December 2004, the Corporate Members’ Committee decided that there was a clear need to begin to develop data on the size, composition and geographic distribution of the green roof industry. This information is helpful in measuring our progress each year and communicating the importance of this new industry to a variety of stakeholder/interested parties.

Survey Methodology

All of the Corporate Members were sent the survey in the form of an Excel spreadsheet. Survey data was sent by the Corporate Members to Kendon Light, who was retained to insure the anonymity of the aggregated data and to provide third party validation of the results. The survey data included the location of green roof projects, the size of the green roof in square feet, and the general type of green roof, as follows:

- Extensive (six inches of growing media or less, light weight, low cost and maintenance)
- Mixed/Semi-intensive (25% of the area, above or below six inches of growing media)
- Intensive (total area more than six inches of growing media, greater weight, cost, maintenance and plant diversity)



14 completed surveys were received. Several of our members were unable to complete them because they did not have ability to collect the data requested for various reasons. The results were tabulated and reviewed by Kendon Light.

The actual number of square feet of completed projects in 2006 in North America is therefore *higher* than what is reported here, because of two factors: one, not all of our members' projects are reflected in the data and two, our Corporate Members do not currently represent the entire green roof industry. We estimate that this survey captures approximately 75% of the market activity – therefore we estimate the final growth rate significantly exceeds the 24% shown here. Despite these limitations, the data provides an excellent figure for the growth of the sector as well as a strong baseline of implemented projects. The data also gives us a strong representation of the cities where most of the green roof activity is currently taking place.

2006 Survey Results

Growth of North American Green Roof Industry in **2006**, by Green Roof Type:

	Square Footage	Percent Growth Over 2005
- Total (362 projects):	3,064,200	24%
- Extensive (259 projects):	1,957,217	10%
- Intensive (88 projects):	1,033,196	112%
- Mixed/Semi-intensive (15 projects)*:	73,787	-63%*

*Please note that the small sample sizes of Mixed/Semi-intensive projects means that the growth rate was disproportionately influenced by three large projects in 2005.

Square footage of green roofs submitted for **2005** for North America:

- Total (313 projects):	2,471,550
- Extensive (232 projects):	1,784,755
- Intensive (64 projects):	488,109
- Mixed/Semi-intensive (17 projects):	198,686

Top ten cities, by square footage planted in 2006:

City	State/Province	Total square footage
1. Chicago	IL - Illinois	358,774
2. Washington, DC	DC – District of Columbia	301,751
3. Wildwood Crest	NJ - New Jersey	240,000
4. Dulles	VA - Virginia	230,000
5. Kansas City	MO - Missouri	178,008
6. Phoenix	AZ - Arizona	168,517
7. Milwaukee	WI - Wisconsin	79,513
8. New York City	NY - New York	67,898
9. Portland	OR - Oregon	64,442
10. Columbus	OH - Ohio	58,025

A number of these jurisdictions, such as Chicago and Washington have policies and programs in place which support green roof implementation, hence their leadership.



Conclusion

The green roof industry is off to a very strong start and this data provides an important baseline from which to measure future progress. Green Roofs for Healthy Cities and its member companies will work to improve the rate of participation in the industry association and the annual survey in 2007. We project much greater increases in industry growth and coverage in the years ahead, particularly as more public agencies begin to invest in this important new infrastructure.

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Cover photos of 2006 Green Roof Awards of Excellence winners. Top to bottom: Phillips Eco-Enterprise Center (PEEC), Minneapolis, MN – submitted by The Kestrel Design Group, Inc.; Mashantucket Pequot Museum and Research Center, Mashantucket, CT – submitted by Mashantucket Pequot Museum and Research Center; Eastern Village, Silver Spring, MD – submitted by Eco Housing Corporation; 10th @ Hoyt Apartments, Portland, OR – submitted by Koch Landscape Architecture; 601 Congress Street, Seaport District, Boston, MA – submitted by Sasaki Associates, Inc.