ASEAN Roofing Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Construction & Infrastructure (Real Estate & Construction)
> **Source:** https://www.mordorintelligence.com/industry-reports/asean-roofing-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 5.78 billion
Projected Forecast (2031)	USD 5.78 billion
Growth Rate (CAGR)	5.24 %
Largest Market Region	Competitive Landscape
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in ASEAN Roofing industry](images/chart_2.png)

![ASEAN Roofing Market (2026 - 2031)](images/chart_3.png)

![ASEAN Roofing Market: Market Share by Material](images/chart_4.png)

![ASEAN Roofing Market: Market Share by Application](images/chart_5.png)

![ASEAN Roofing Market](images/chart_6.png)

![Icon](images/chart_7.png)

![footer background image](images/chart_9.png)

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![ESOMAR](images/chart_16.png)

![GPTW](images/chart_18.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period | 2020 - 2031 |
Forecast Data Period | 2026 - 2031 |
Base Year Market Size (2025) | USD 5.5 Billion |
Market Size (2026) | USD 5.78 Billion |
Market Size (2031) | USD 7.46 Billion |
Growth Rate (2026 - 2031) | 5.24 % |
Market Concentration | Low |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

ASEAN Roofing Market Analysis by Mordor IntelligenceThe ASEAN Roofing Market size is projected to be USD 5.5 billion in 2025, USD 5.78 billion in 2026, and reach USD 7.46 billion by 2031, growing at a CAGR of 5.24% from 2026 to 2031.

The ASEAN roofing market is being supported by two steady demand pools, mass residential construction and expanding industrial and logistics real estate, while public infrastructure spending is adding a firm base of project activity across the region. Indonesia is keeping demand stable through a state-backed renovation drive for 2 million substandard homes, supported by Rp 43.6 trillion (USD 2.65 billion), which is turning housing policy into a direct volume for roofing replacements. Vietnam is adding another layer of support with 158,723 social housing units targeted for 2026 and a wider 973,471-unit pipeline through 2030, while public investment disbursements are rising and construction output is expected to strengthen in parallel. Lower intra-ASEAN trade barriers and the 2026 Passive Cooling Roadmap are also pushing the ASEAN roofing market toward higher-value reflective, insulated, and system-based products instead of basic commodity sheets in many public and institutional projects. At the same time, steel, bitumen, and petrochemical price swings are keeping the ASEAN roofing market split between volume suppliers competing on price and premium suppliers defending margins through warranty, performance, and specification support.

Key Report Takeaways

* By material type, metal roofing accounted for 38% of revenue in 2025, while single-ply membranes are projected to expand at a 6.4% CAGR through 2031.
* By construction type, new construction accounted for 64% of 2025 revenue and also leads growth with a 5.9% CAGR through 2031.
* By application, residential accounted for 51% of the ASEAN roofing market size, while commercial is forecast to record the fastest growth at a 6.0% CAGR through 2031.
* By geography, Indonesia held 35% of the ASEAN roofing market share in 2025, while Vietnam is expected to grow at the fastest pace with a 6.7% CAGR through 2031.

Key Market Trends

ASEAN Roofing Market Trends and InsightsDrivers Impact Analysis*

Drivers	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Government Housing and Infrastructure Pipelines Expanding Roofing Demand	+1.4%	Indonesia, Vietnam, Philippines, Thailand	Short term (≤ 2 years)
Green Building and Thermal Performance Rules Supporting Cool and Insulated Roofs	+0.9%	ASEAN-wide, with strongest compliance in Singapore, Vietnam, Thailand	Medium term (2-4 years)
Industrial, Logistics, Cold Chain, and Data Center Build Out Increasing Demand for Insulated Panels and Membranes	+0.8%	Indonesia, Thailand, Vietnam, Singapore	Medium term (2-4 years)
Tropical Humidity, Monsoon Exposure, and Leakage Risk Lifting Waterproofing Intensity	+0.6%	Philippines, Indonesia, Vietnam	Short term (≤ 2 years) to Medium term (2-4 years)
Green Roofs, Siphonic Drainage, and Stormwater Features Adding Premium Content	+0.3%	Singapore, Thailand, Vietnam urban centers	Long term (≥ 4 years)
Lower Intra-ASEAN Trade Barriers Improving Access to Premium Roofing Inputs	+0.3%	ASEAN-wide	Short term (≤ 2 years) to Medium term (2-4 years)

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The ASEAN roofing market is fragmented overall, as no company controls all major material categories across the region. Regional manufacturers such as SCG, Swissma Building Technologies, and Le Nam Megasheet are most visible in metal roofing and related products, where competition centers on price, fabrication capacity, and delivery speed. Global specialists such as Sika, SOPREMA, and Kingspan are stronger in membranes, waterproofing, and insulated panel systems, where technical approval, specification access, and installer certification matter more than simple volume reach. This split keeps the ASEAN roofing market competitive across a wide product perimeter and prevents a single supplier from dominating both commodity and premium roofing demand. It also means that market leadership often depends on the product segment under discussion rather than on a single clear regional winner.

Sika’s acquisition of Elmich Pte Ltd in February 2025 is a clear example of how premium players are using targeted deals to widen their roofing system offer. Elmich brought urban greening and green-roof capabilities that fit directly with Sika’s existing waterproofing and membrane portfolio in Singapore and the wider Asia Pacific region[3]Sika AG, “Sika Acquires Leading Green Roof Provider in Singapore,” Sika AG, sika.com. Kingspan made a similar move in March 2025 by acquiring Hao Wei in Malaysia, which gave it a local XPS insulation production base and reduced its dependence on imported supply for Southeast Asia. In a price-sensitive region, that type of local manufacturing step can narrow the landed-cost gap between high-performance systems and lower-cost alternatives.

SCG has also strengthened its position through product development and portfolio expansion in the ASEAN roofing market. The company launched the LumaX Series in Thailand in 2025 to target higher-value design requirements and reported more than THB 993 million (USD 28.4 million) in Q1 2026 revenue from roofing lines within its Smart Value Product portfolio. SCG Cement-Building Materials also acquired an 80% stake in Siam Coating Innovation Co., Ltd. in 2025, thereby improving its access to high-performance coating capabilities for fiber-cement, metal, and concrete roofs. As the ASEAN roofing market moves toward stronger specification requirements in Vietnam and Indonesia, the pressure on domestic volume players, regional champions, and global specialists is likely to intensify rather than ease.

ASEAN Roofing Industry Leaders* SCG

* Thung Hing

* Swissma Building Technologies

* Le Nam Megasheet

* LCP Group

* *Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

ASEAN Roofing Market Report ScopeThe ASEAN Roofing Market is Segmented by Material Type (Asphalt Shingles, Clay & Concrete Tiles, Metal Roofing, Bituminous / Modified Bitumen Membranes, Single-Ply Membranes, Wood, and Others), Construction Type (New Construction, Reroofing and Replacement), Application (Residential, Commercial, Industrial, and more), and Geography (Indonesia, Vietnam, Thailand, and more). The Market Forecasts are Provided in Terms of Value (USD).

By Material TypeAsphalt Shingles |
Clay & Concrete Tiles |
Metal Roofing |
Bituminous / Modified Bitumen Membranes |
Single-Ply Membranes (TPO, EPDM, and PVC) |
Wood |
Others |

Segmentation Accordion Item

By GeographyIndonesia |
Vietnam |
Thailand |
Philippines |
Rest of ASEAN |

Frequently Asked Questions

What is the current outlook for ASEAN roofing demand through 2031?

The ASEAN roofing market stands at USD 5.78 billion in 2026 and is forecast to reach USD 7.46 billion by 2031 at a 5.24% CAGR, supported by housing, industrial projects, and public infrastructure.

Which material category leads roofing demand in ASEAN today?

Metal roofing leads with 38% of 2025 revenue because it suits industrial sheds, peri-urban housing, and public works where cost and installation speed matter most.

Which roofing materials are growing the fastest across ASEAN?

Single-ply membranes are the fastest-growing material segment with a 6.4% CAGR through 2031, driven by data centers, cold-chain assets, and other highly specified buildings.

Why is Vietnam growing faster than other ASEAN countries in roofing?

Vietnam is forecast to grow at a 6.7% CAGR through 2031 because of its social housing pipeline, rising public investment, and its role as a regional manufacturing hub.