

## **Skylight Market - Global Outlook & Forecast 2023-2028**

Market Report | 2023-02-15 | 265 pages | Arizton Advisory & Intelligence

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### **Report description:**

The global skylight market size is growing at a CAGR of 6.30% during 2022-2028.

The global market is expected to witness rapid growth during the forecast period, driven by rising demand for daylighting solutions, increased emphasis on environmental sustainability, and reduced energy consumption in commercial and residential buildings. The skylight installation in new buildings and the renovation and replacement of existing structures primarily drive the market. Skylights are used in residential and commercial facilities, including retail, hospitality, hospitals, educational institutes, government institutes, warehouses, and other industrial facilities.

The commercial sector witnessed drastic growth in 2022. For instance, APAC countries play a significant role in new commercial construction buildings. New construction projects are commenced, such as the Seomyeon office building development for office space in south Korea; for this project, around USD 715 million were invested. Also, for 360 Queen Street Office Tower project, around USD 608 million were invested. This construction work begins in Q2 2022, and the plan is expected to be completed in Q4 2025. These upcoming commercial building projects support the skylight market in the forecast period.

Buildings account for up to 24% of greenhouse gas emissions and over 40% of the world's primary electricity use. These numbers are increasing YOY due to the rising world population and improving living standards. The global landscape industry will likely be confronted with energy shortage in the future, and unfavorable climate changes are quite evident. It has been established with sufficient evidence that the present energy generation system is not sustainable. There is a need to shift to renewable sources such as solar energy for clean and sustainable energy. A well-designed skylight can substantially reduce commercial or residential building energy level consumption and improve occupant performance and provide relaxation space. With the productive application of skylights, photo controls, and electric lighting, the whole building's energy utilization and peak load reductions play a significant role in all continental climates. Further, renovations, infrastructural development, and remodeling of existing commercial and residential buildings would also support the skylight market's growth.

### **MARKET TRENDS & OPPORTUNITIES**

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## Regulation on Energy Efficiency Driving Skylight Demand

As the global trend is shifting towards sustainability, governments worldwide are implementing regulations to reduce energy consumption and use it more efficiently across all stages of the energy chain, including generation, transmission, distribution, and end-use. Such policies are driving consumers toward renewable energy and reducing electricity consumption. A major portion of electricity is consumed for lighting in residential and commercial buildings; however, the use of skylights and other daylighting solutions can significantly reduce the requirement for lighting through a major portion of the day, resulting in efficient use of energy across all sectors.

In the US, the National Action Plan for Energy Efficiency was implemented as a part of the private-public initiative to create a sustainable, aggressive national commitment to energy efficiency through collaborative efforts of gas and electric utilities, utility regulators, and other partner organizations. Such initiatives can largely create opportunities to reduce energy consumption in US homes, buildings, and schools, save billions on consumer utility bills, and reduce the requirements for additional power supply. Therefore, energy efficiency regulations are projected to support the growth rate of the skylight market in the upcoming years.

## Growth of Green Building Activities

Skylights are considered an effective way a building can meet its sustainable standards, as they can provide an abundance of natural light and reduce or eliminate the need for electric lighting during daylight hours. Commercial buildings in the US houses have more than 64 billion feet of lit floor space. Most of these buildings are lit by fluorescent lighting systems. Approximately 30% to 50% of these spaces have access to daylight through windows or skylights. Several institutions, commercial buildings, and residential units have implemented daylighting strategies through skylights, roof windows, and others and have been reported to reduce energy consumption significantly. Such factors promote the growth of the skylight market.

## SEGMENTATION INSIGHTS

### INSIGHTS BY PRODUCT TYPE

Skylights are available in various shapes and designs. Some popular skylight types include tubular, pyramid, dome, barrel vault, and custom designs. The global tubular skylight market was valued at USD 1.01 billion in 2022 and dominated the product segment with a share of 33% in 2022. Although most of the tubular skylights may appear similar, there are technical differences. Consumers increasingly seek products that deliver the full spectrum of light, with a spectral reflectance of 99.7%. Further, leak prevention and built-in tubular skylights are also gaining popularity. Consumers are more likely to check the adaptability of tubing configuration and the Energy Star label, which guarantees thermal performance and efficiency.

Custom skylights accounted for the second-largest share of the global skylight market. Custom skylights are popular in commercial buildings to create a more aesthetically appealing environment. However, custom skylights are generally incorporated in luxury or high-end residential buildings. The cost of custom skylights is generally higher than other skylights, depending on the size of the skylight, shape, material, structure, and opening. The cost of custom skylights is generally 25% higher than traditional skylights.

#### Segmentation by Equipment Type

- Tubular
- Custom
- Pyramid
- Dome
- Barrel Vault

### INSIGHTS BY OPERATION TYPE

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The fixed operation segment dominated the global skylight market, accounting for a 45.55% share in 2022. Fixed, manual, and electric are key operation types in the global skylight market. A fixed skylight is the most popular skylight type globally and does not provide any air ventilation and are popularly used for lighting in attics and stairwell. Approximately 90% of the fixed skylights are made of glass, and the frames are steel, aluminum, or timber. Fixed skylights have widespread usage in both residential and commercial buildings.

Manual skylights accounted for a market share of 32.50% in 2022. And the global manual skylight market is expected to grow at a CAGR of 6.32% during the forecast period. Manual skylights are ideal for kitchens or bathrooms as they can remove excess moisture and keep a steady flow of air. However, owing to the product's high price, it is not commonly used in residential buildings and is highly popular in institutional buildings such as hospitals and schools.

#### Segmentation by Operation

- Fixed
- Manual
- Electric

#### INSIGHTS BY MATERIAL TYPE

The global skylight market is segmented into glass, acrylic, polycarbonate, and others by material type. Glass skylights dominated the global market with approximately 45.10% of the skylight market share in 2022. Consumers prefer glass as these skylights are more durable, do not discolor, and are aesthetically more appealing.

#### Segmentation by Material

- Glass
- Acrylic
- Polycarbonate
- Others

#### INSIGHTS BY INSTALLATION TYPE

The global skylight replacement demand market was valued at USD 2.23 billion in 2022. One of the major causes for replacing or repairing skylights is a leak around the installed skylight; the leak can cause water damage to the interiors of the building. Other demands, such as the expansion of the size of the skylight, discoloration, and cracks, are also driving the skylight replacement demand market's growth. Further, the growing demand for smart and electric skylights drives replacement demand for photovoltaic skylights. Replacement demand originates from all sectors, including commercial, industrial and residential.

#### Segmentation by Installation

- Replacement Demand
- New Construction

#### INSIGHTS BY END-USER TYPE

The commercial end-user accounted for the largest skylight market share of approximately 78.61% in 2022. Some major commercial property construction markets include the US, Canada, China, Brazil, Germany, the UK, Australia, Hong Kong, Japan, and Singapore. With the expansion of commercial properties, and a need to reduce energy consumption, the demand for skylights is expected to grow. The global commercial real estate market experienced rapid growth in 2022, mainly supported by the rising aggregate global investments. Commercial real estate mainly refers to retail stores, shopping malls, corporate offices, hotels, restaurants, business parks, and other commercial properties demand.

#### Segmentation by End-User

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- Residential
- Commercial

## GEOGRAPHICAL ANALYSIS

Europe is projected to be the largest skylight market by 2027. The growth of new building installations and higher demand from renovations and retrofit activities drive the regional market. The demand for retrofit and renovation accounted for the majority of the market demand in Europe. Major factors spiking the sales rate for skylights in Europe are rising average construction spending, increasing retail building construction projects, rising government spending on sustainable building development, industrial developments, rapid urbanization, changing climatic conditions, and growth in disposable income across European countries.

The growth of infrastructural construction is set to speed up significantly post-2021. These infrastructural projects in Europe are estimated to reach a total investment of about USD 14.8 trillion. They are expected to be completed by 2040, creating a massive demand for skylights at these locations in Europe. Further, in 2021, the federal government invested over USD 324 billion in public infrastructure to improve roads, railways, and waterways over the next 10 to 15 years in Germany. And the French Government plans to spend around USD 85 billion to expand transport infrastructure by 2037. Construction activities on the USD 33.75 billion Grand Paris Express Metro Rail project. Such initiatives are anticipated to propel the growth of the skylight market.

### Segmentation by Geography

- North America
  - o□US
  - o□Canada
- Europe
  - o□Germany
  - o□France
  - o□UK
  - o□Italy
  - o□Russia
- APAC
  - o□China
  - o□Australia
  - o□Japan
  - o□India
- Middle East & Africa
  - o□Saudi Arabia
  - o□UAE
  - o□South Africa
- Latin America
  - o□Brazil
  - o□Mexico
  - o□Argentina

## COMPETITIVE LANDSCAPE

The global skylight market is highly competitive, with many public and private companies. These vendors typically compete on key parameters such as product design, quality, reliability, support services, and price. The rapid technological advancements are adversely impacting the market vendors as consumers are expecting continuous innovations and upgrades of products. Some

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major vendors dominating the global skylight market include Velux, Fakro, and Kingspan Light + Air. These brands have a large set of product offerings with a widespread presence in the global market. The major vendors are adopting innovative technologies to retain their strong market position.

The presence of diversified global and regional vendors characterizes the market. The global key vendor, Velux, introduced innovative smart skylight technology. These skylights have features that can monitor air quality, humidity, and temperature and are equipped with Netatmo intelligence technology. These skylights have 'plug and play' smart home solutions for remote sensor-based operation and automatically detect the sunlight level, humidity, temperature, and carbon dioxide levels to adjust the opening and closing of valves and motorized shades.

#### Key Vendors

- VKR Group
- Fakro
- Kingspan Light + Air

#### Other Prominent Vendors

- Roto
- Lonsdale Metal Co
- Sun-Tek Skylights
- Roofglaze
- Onyx Solar Group LLC.
- SKYVIEW SKYLIGHT INC.
- Sunoptics
- Duplus Architectural Systems
- Skydome
- LAMILUX Heinrich Strunz Holding GmbH & Co. KG
- Columbia Manufacturing Co. Ltd.
- CrystaLite, Inc.

#### KEY QUESTIONS ANSWERED

- How big is the skylight market?
- What is the growth rate of the global skylight market?
- Which region holds the largest global skylight market share?
- What are the significant trends impacting the skylight market?
- Who are the key players in the global skylight market?

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		Date	<input type="text" value="2025-05-05"/>
		Signature	<input type="text"/>

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