

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

Market Report | 2024-02-06 | 353 pages | Arizton Advisory & Intelligence

### **AVAILABLE LICENSES:**

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### **Report description:**

The global daylight market is expected to grow at a CAGR of 5.96% from 2022 to 2028.

### **MARKET TRENDS & OPPORTUNITIES**

#### **Rising Installation of Roof Lights for Commercial Spaces**

The increasing adoption of roof lights in commercial projects can be attributed to their ability to enhance natural daylight, consequently reducing the reliance on artificial lighting. Roof lights, which are windows installed on a building's roof to optimize the inflow of natural light, have traditionally been found to be used in large commercial settings like warehouses and offices with high ceilings or those lacking attic space. In other words, roof lights are specialized architectural features installed in the roof or ceiling of commercial buildings to harness and optimize natural light. However, due to their multiple advantages, beyond just augmenting daylight, roof lights are now gaining substantial consideration for use in residential properties. In addition, roof lights are integral to sustainable building practices, as they reduce a building's environmental impact. As businesses and building owners increasingly prioritize sustainability, installing roof lights has become a strategic choice to reduce carbon emissions, meet sustainability goals, and support the daylight market growth.

#### **Growing Sustainable and Green Buildings**

The growing focus on sustainable and green building practices is a significant driver of the global daylight market. Sustainable and green building principles prioritize energy efficiency, environmental responsibility, occupant well-being, and resource conservation. Sustainable and green building practices aim to minimize energy consumption. Daylight systems reduce the need for artificial lighting during daylight hours, leading to significant energy savings and lower operational costs for building owners. Many sustainable certifications and local building codes require minimum daylighting and energy-efficient lighting systems. This encourages the adoption of daylighting solutions in green buildings.

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## INDUSTRY RESTRAINTS

### High Cost of Installation

Although daylighting can provide numerous positive results regarding energy efficiency and worker performance, a high-performance system requires a significant initial investment, considered the major challenge for daylight market growth. However, while implementing an integrated and strategic design approach, a company can allow overall long-term savings, making up for the initial investment in daylighting systems. Installing skylights, light tubes, and curtain walls is generally more expensive, depending on the building design and material used.

The primary factor that challenges daylight market growth is profit or return on investments. Daylighting represents only a small share of the lighting market, which offers growth opportunities. However, the profit motive and the marketing machine behind the electric luminaires are more robust and easier to quantify. Thus, like other renewable resources, daylighting also suffers from the owner-tenant riddle, where although the facility owner invests, the tenant earns the benefits.

## SEGMENTATION INSIGHTS

### INSIGHTS BY PRODUCT

The global daylight market by product is segmented into windows, curtain walls, and skylights. The Windows product segment dominated the global industry in 2022. The growth of the windows market is attributed to higher spending on new offices and commercial buildings in China and the development of residential construction in the US. The U.S. and China are expected to account for 65% of the global window sales growth and demand. Further, new residential construction is estimated to account for most of the market in 2022, and this trend is expected to continue during the forecast period. The MEA region is expected to witness the fastest growth for windows, supported by the rise in residential construction, growing income levels, and rural-to-urban migration.

#### Segmentation by Product

- Windows
- Curtain Walls
- Skylights

### INSIGHT BY INSTALLATION

The replacement installation segment held the most prominent share of the global daylight market in 2022. With the remodeling and reconstruction of residential spaces, most homeowners are focused on upgrading their living standards by adopting daylight systems or skylights to decrease electricity use and feel the natural sunlight. These products can be easily re-installed in a building, providing extensive benefits for end users. Thus, the interest in electricity or light renovation projects is expected to fuel the segmental market growth during the forecast period. Further, the growing demand for photovoltaic, bright, and electric daylight systems drives replacement demand. Replacement demand originates from all commercial, industrial, and residential sectors. Daylight systems are frequently found in historic industrial buildings and are often a significant portion of the roof.

#### Segmentation by Installation

- Replacement
- New Construction

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## INSIGHT BY END USER

The residential end-user segment dominated the global daylight market in 2022. The rising global population and shrinking size of households are driving the demand for housing facilities. To meet the increasing demand, governments worldwide are implementing policies to support the construction of residential units. Other major emerging markets for residential construction include China, India, Germany, Australia, Indonesia, Brazil, the UAE, and Saudi Arabia. Further, initiatives by the U.S. and Europe to decrease the overall energy consumption in residential and commercial buildings are driving daylight installation growth. Further, retail and corporate offices primarily go the daylight market among commercial properties. Retail buildings accounted for approximately 25% of the industry share, and corporate offices accounted for around 31% in 2022. Hospitality was the fastest-growing market for commercial daylighting and is estimated to grow at a CAGR of 7.39% during the forecast period.

### Segmentation by End-users

- Residential
- Commercial

### Segmentation by Commercial End-User

- Corporate Offices
- Retail & shopping malls
- Hospitality
- Educational Institutions
- Healthcare
- Sports Facilities
- Others

## INSIGHT BY DISTRIBUTION CHANNEL

The global daylight market by Distribution Channel is segmented into offline and online. The offline channels are the most significant distribution channels and dominate the global daylight market. Several stores are located in the central parts of several localities and attract a considerably large customer base. Consumers in different countries prefer B2B stores to purchase daylight products. Therefore, significant daylight product sales occur at B2B supermarkets and hypermarkets-the offline channel witnesses high sales due to distributors' use of the Direct-to-Consumer (DTC) model. Further, distribution via retail stores is a substantial revenue-generating opportunity for several vendors in the global daylight market. Retail stores, in general, are a significant market-capturing platform for several vendors in the industry. It is equally essential for vendors to pitch and promote their products in such a manner that enables them to earn brand loyalty from consumers.

### Segmentation by Distribution Channel

- Offline
- Online

## GEOGRAPHICAL ANALYSIS

The global daylight market is primarily stimulated by installing new daylight systems in new construction projects and replacing existing ones. Daylight systems find applications across various sectors, including residential and commercial spaces such as

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retail, hospitality, recreational facilities, hospitals, educational institutions, government facilities, workspaces, and offices. They are considered an effective means for buildings to meet sustainability standards as they provide ample natural light, reducing or eliminating the need for electric lighting during daylight hours. In commercial buildings, incorporating daylighting can also lead to a 10-20% reduction in cooling energy consumption. Europe and the U.S. are witnessing a heightened focus on energy efficiency, driving increased adoption of daylighting in these regions.

#### Segmentation by Geography

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

#### COMPETITIVE LANDSCAPE

The global daylight market is highly competitive, with the presence of a large number of public and private companies. These vendors typically compete on critical parameters such as product design, quality, reliability, support services, and price. The rapid technological advancements adversely impact the market vendors as consumers expect continuous innovations and product upgrades. The present scenario drives vendors to alter and refine their unique value proposition to achieve a strong industry presence. Some of the major vendors dominating the global daylight market include Velux, Brett Martin, and Lamilux Heinrich Strunz Holding. These brands have many product offerings and a widespread presence in the worldwide industry. The major vendors are adopting innovative technologies to retain their strong industry position.

#### Key Company Profiles

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- []VKR Group
- []Brett Martin
- []LAMILUX HEINRICH STRUNZ HOLDING

#### Other Prominent Vendors

- []Kingspan Light + Air
- []Fakro
- []Sun-Tek Skylights
- []Onyx Solar Group
- []Skyview Skylight
- []Sunoptics
- []Skydome Skylights
- []Colombia Skylights
- []CrystaLite
- []Solatube International
- []Daylight America
- []Atrium Windows and Doors
- []Weather Shield
- []Airclos
- []IQ Glass
- []NorDan
- []Arbonia
- []Aluplast
- []Josko
- []Reynaers Aluminium
- []CoeLux
- []Roto
- []Roofglaze
- []Duplus Architectural Systems
- []Lonsdale Metal

#### KEY QUESTIONS ANSWERED:

- 1.[]How big is the daylight market?
- 2.[]What is the growth rate of the global daylight market?
- 3.[]Which region dominates the global daylight market share?
- 4.[]What are the significant trends in the daylight market?
- 5.[]Who are the key players in the global daylight market?

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##### 29.2.4 COMMERCIAL END-USER: MARKET SIZE & FORECAST

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##### 29.3.2 INSTALLATION: MARKET SIZE & FORECAST

##### 29.3.3 END-USER: MARKET SIZE & FORECAST

##### 29.3.4 COMMERCIAL END-USER: MARKET SIZE & FORECAST

##### 29.3.5 DISTRIBUTION CHANNEL: MARKET SIZE & FORECAST

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##### 29.4.1 PRODUCT: MARKET SIZE & FORECAST

##### 29.4.2 INSTALLATION: MARKET SIZE & FORECAST

##### 29.4.3 END-USER: MARKET SIZE & FORECAST

##### 29.4.4 COMMERCIAL END-USER: MARKET SIZE & FORECAST

##### 29.4.5 DISTRIBUTION CHANNEL: MARKET SIZE & FORECAST

#### 29.5 LATIN AMERICA

##### 29.5.1 PRODUCT: MARKET SIZE & FORECAST

##### 29.5.2 INSTALLATION: MARKET SIZE & FORECAST

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