

Rooftop Solar PV Market By Deployment (Terrace Mounted, Pole Mounted), By Technology (Thin Film, Crystalline Silicon), By Grid Type (Off-Grid, Grid Connected), By End-Use (Residential, Commercial, Industrial): Global Opportunity Analysis and Industry Forecast, 2023-2032

Market Report | 2024-03-01 | 225 pages | Allied Market Research

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Report description:

The global rooftop solar PV market was valued at \$51.2 billion in 2022, and is projected to reach \$89.8 billion by 2032, growing at a CAGR of 5.8% from 2023 to 2032. Solar roof is made up of several components such as PV tiles and non-PV tiles, metal flashings that improve the aesthetics of your roof, and solar inverters. These components work together to harvest sunlight and convert it to DC electricity, which may then be utilized to power your appliances.

Market Dynamics

The rapid industrialization and global population growth have significantly increased the demand for power. Rise in public awareness of power generation using renewable energy sources is expected to drive the rooftop solar PV industry. Increase in the investment of the government and private institutions towards the utilization of efficient solar energy is anticipated to boost the market growth. In 2023, the industrial sector accounted for over 35% of the total U.S. end use energy consumption according to Energy Information Administration. Hence, rapid industrialization globally will increase the electricity demand. The increase in the electricity demand led to the development of green energy sources such as building integrated solar. Rising environmental concerns due to strict laws to reduce GHG emissions have forced companies to adopt effective energy conservation measures, and implementation of stringent government regulations to control carbon footprints have encouraged industries to opt for integration with effective energy conservation methods which led to the rapid expansion of the rooftop solar PV market during the forecast period. Such advantages have driven the demand for the rooftop solar PV market.

The presence of huge installation costs and the need for maintenance of solar panels mounted on roofs are hampering the market growth. Furthermore, solar technology serves as an ideal option for various end use applications, high capital costs associated with solar installations as compared to other emerging renewable technologies restrain the growth of the market.

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India's rooftop solar sector has shown remarkable growth in 2023, according to data from various sources. The Bridge to India's Solar Rooftop Map (June 2023) reports that residential rooftop solar installed capacity in the country has reached 2.7 GW. Despite challenges, India has made considerable progress towards its ambitious target of 40 GW of rooftop solar by 2022, with approximately 11 GW achieved as of October 31, 2023. The first quarter of 2023 witnessed the addition of 485 MW of rooftop solar capacity, bringing the cumulative installations to 9.3 GW by March 31, 2023. The government's plan aims to generate 6 GW from rooftop solar systems out of the targeted 22 GW power generation capacity. With an average increase of 2 GW in the past two years, India's rooftop solar installations contribute significantly to the nation's total solar capacity of around 66 GW as of June 30, 2023. The abovementioned growth in figures reflects India's commitment to promoting sustainable energy solutions through the widespread adoption of rooftop solar panels.

Segments Overview

The rooftop solar PV market is segmented into deployment, technology, grid type, end use, and region. Depending on the deployment, it is categorized into terrace-mounted and pole-mounted. On the basis of technology, it is bifurcated into thin film and crystalline silicon. On the basis of grid type, it is classified into off-grid and grid-connected. On the basis of end use, it is classified into residential, commercial, and industrial. Region-wise, the market is studied across North America, Europe, Asia-Pacific, and LAMEA. Presently, Asia-Pacific accounts for the largest share of the market, followed by Europe, North America, and LAMEA.

Crystalline silicon type solar cells are one of the most widely used semiconductor materials in photovoltaic (PV) technology to manufacture solar cells and are made of highly pure silicon wafers that are further used to convert solar energy into electrical energy. C-Si occupies more than half of the total PV market revenue owing to its benefits and improved efficiency. Monocrystalline Si solar cell technology is widely used in rooftop solar panels to convert the highest amount of solar energy into electricity, owing to its properties such as higher efficiency in generating electricity, long service life, and lower installation cost. An increase in demand for rooftop solar panels for the generation of electricity and implementation of government regulations to reduce dependency on the usage of fossil fuels to curb carbon emissions across countries such as the U.S., Germany, France, Spain, India, and China are anticipated to boost the demand for mono-Si solar cell technology.

On-grid type is a solar energy system that uses photovoltaic modules to generate electricity. The on-grid type systems are connected to the electric grid and used to supply power to it. These systems can be easily integrated with the existing power grid as they use renewable sources of energy for generating electricity, which reduces carbon dioxide emissions into the atmosphere.

Regional Analysis

Asia-Pacific also accounted for a significant share of the global market revenue in 2021. Asia-Pacific is the largest consumer in the global rooftop solar PV market, owing to the presence of key developing economies such as China, India, and Japan, which registered the highest market share in the rooftop solar PV market in the year 2022. In addition, Europe is the second largest market share region for this market. The solar energy share in total electricity production of Europe for 2022 was 16.0%. The increase in the production of solar energy in Europe is attributed to the surge in the installation of BIPV systems. The rise in construction activities has led to an increase in the installation of BIPV systems to generate electricity to meet emergency power needs. In addition, the implementation of stringent environmental regulations to reduce carbon emissions is expected to increase the demand for rooftop solar across Europe.

The major companies profiled in this report are JinkoSolar, JA Solar, Trina Solar, LONGi Solar, Canadian Solar, First Solar, SunPower Corporation, Indosolar, Hanwha Q-cells, and E-Ton Solar. The decline in the cost price of solar panels and the increase in awareness among the people regarding the advantages of utilization of rooftop solar panels have a positive impact on the rooftop solar PV market. Additional growth strategies such as an expansion of storage capacities, acquisition, partnership, and research & innovation in the optimization and improvement of the efficiency and reliability of sodium-ion batteries have led to key developments in the global rooftop solar PV market trends.

Key Market Trends

-On the basis of deployment, the pole-mounted segment registered the highest accounting for more than two-thirds of the market share and is projected to maintain the same during the forecast period.

-On the basis of technology, the crystalline silicon segment registered the highest accounting for more than four-fifths of the market share, and is projected to maintain the same during the forecast period.

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-On the basis of grid-type, grid connected segment registered the highest accounting for more than four-fifths of the market share and is projected to maintain the same during the forecast period.

-On the basis of end-use, industrial registered the highest market share accounting for more than two-fifths of the market share in 2022.

-On the basis of region, Asia-Pacific dominates the highest market share accounting for more than half of the market share in 2022.

Key Benefits For Stakeholders

-This report provides a quantitative analysis of the market segments, current trends, estimations, and dynamics of the rooftop solar pv market analysis from 2022 to 2032 to identify the prevailing rooftop solar pv market opportunities.

-The market research is offered along with information related to key drivers, restraints, and opportunities.

-Porter's five forces analysis highlights the potency of buyers and suppliers to enable stakeholders make profit-oriented business decisions and strengthen their supplier-buyer network.

-In-depth analysis of the rooftop solar pv market segmentation assists to determine the prevailing market opportunities.

-Major countries in each region are mapped according to their revenue contribution to the global market.

-Market player positioning facilitates benchmarking and provides a clear understanding of the present position of the market players.

-The report includes the analysis of the regional as well as global rooftop solar pv market trends, key players, market segments, application areas, and market growth strategies.

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- Manufacturing Capacity

- Capital Investment breakdown

- Investment Opportunities

- Upcoming/New Entrant by Regions

- Technology Trend Analysis

- Regulatory Guidelines

- Strategic Recommendations

- Additional company profiles with specific to client's interest

- Additional country or region analysis- market size and forecast

- Expanded list for Company Profiles

- Historic market data

- Import Export Analysis/Data

Key Market Segments

By Deployment

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- Terrace Mounted
- Pole Mounted
- By Technology
 - Thin Film
 - Crystalline Silicon
- By Grid Type
 - Off-Grid
 - Grid Connected
- By End-Use
 - Residential
 - Commercial
 - Industrial
- By Region
 - North America
 - ? U.S.
 - ? Canada
 - ? Mexico
 - Europe
 - ? Germany
 - ? Italy
 - ? Spain
 - ? UK
 - ? France
 - ? Rest of Europe
 - Asia-Pacific
 - ? China
 - ? Japan
 - ? India
 - ? Australia
 - ? South Korea
 - ? Rest of Asia-Pacific
 - LAMEA
 - ? Brazil
 - ? South Africa
 - ? UAE
 - ? Rest of LAMEA
- Key Market Players
 - ? Jinko Solar Holding Co. Ltd.
 - ? JA Solar Holdings Co. Ltd.
 - ? Trina Solar Co. Ltd.
 - ? LONGi Group
 - ? Canadian Solar Inc.
 - ? First Solar, Inc.
 - ? SunPower Corporation
 - ? Indosolar Ltd
 - ? Hanwha Q-cells
 - ? E-Ton Solar Tech Co., Ltd.

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