

DG Rooftop Solar PV Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Capacity (up to 10 kW, 11 kW - 100 kW, Above 100 kW), By End-User (Residential, Commercial, Industrial), By Region, By Competition, 2020-2030F

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Report description:

Global DG Rooftop Solar PV Market was valued at USD 6.7 Billion in 2024 and is expected to reach USD 10.38 Billion in 2030 and project robust growth in the forecast period with a CAGR of 7.4% through 2030. The global distributed generation (DG) rooftop solar photovoltaic (PV) market has witnessed significant growth in recent years, driven by a convergence of environmental consciousness, technological advancements, and economic factors. As businesses and consumers increasingly prioritize sustainable energy solutions, rooftop solar PV systems have gained prominence for their efficiency, affordability, and environmental benefits. The declining costs of solar technology, coupled with innovations in energy storage and grid integration, have further boosted market expansion. Governments worldwide have introduced supportive policies, incentives, and subsidies, encouraged the adoption of rooftop solar systems and reducing dependence on fossil fuels. The growing need for energy resilience and the desire to mitigate climate change effects have spurred investments in DG rooftop solar projects across various sectors, including residential, commercial, and industrial. This market's upward trajectory is expected to continue, with businesses and individuals embracing rooftop solar PV systems as a vital step towards a sustainable energy future.

Key Market Drivers

Technological Advancements and Cost Efficiency

Technological advancements and cost efficiency play a pivotal role in propelling the Global DG Rooftop Solar PV Market forward. As solar technology continues to evolve, innovations have significantly enhanced the efficiency and effectiveness of rooftop solar PV systems. Advancements in photovoltaic cell design, materials, and manufacturing processes have led to higher conversion efficiencies, enabling solar panels to generate more electricity from sunlight. Breakthroughs in energy storage solutions, such as high-capacity batteries and smart inverters, have revolutionized how excess energy is stored and utilized, ensuring a consistent

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power supply even during periods of low sunlight. These advancements have addressed one of the primary challenges of solar energy: its intermittent nature. Furthermore, improvements in monitoring and control systems have enabled real-time performance tracking and remote management, enhancing the overall reliability and functionality of DG rooftop solar PV installations.

In parallel, the continuous drive for cost efficiency has made rooftop solar PV systems more accessible and appealing to a broader consumer base. The plummeting costs of solar panels, largely due to economies of scale, research, and development, have significantly lowered the initial investment required for solar installations. Streamlined manufacturing processes and increased competition in the solar industry have further contributed to cost reduction. The declining costs have not only made rooftop solar installations economically viable for homeowners and businesses but have also attracted substantial investments from the commercial and industrial sectors. Advancements in installation techniques and standardized designs have reduced labor costs and installation time, making the adoption of rooftop solar PV systems more efficient and hassle-free.

The synergy between technological advancements and cost efficiency has created a favorable environment for widespread adoption. Businesses and consumers alike are now inclined to invest in DG rooftop solar PV systems, recognizing the long-term financial benefits and the positive environmental impact. The economies of scale resulting from increased demand further stimulate innovation, leading to a cycle of continuous improvement and cost reduction. This cycle, driven by technological innovation and cost efficiency, not only fuels the growth of the Global DG Rooftop Solar PV Market but also contributes significantly to the global transition towards sustainable and renewable energy sources. In 2010, the average cost of solar PV installation was around USD 3.70 per watt; in 2024, it is expected to be closer to USD 1.20 per watt due to advancements in manufacturing, materials, and economies of scale.

Supportive Government Policies and Environmental Awareness

Supportive government policies, subsidies, and incentives aimed at promoting renewable energy adoption play a pivotal role in the rising prominence of DG rooftop solar PV systems. Governments worldwide are implementing initiatives to reduce carbon emissions, enhance energy security, and transition towards sustainable energy sources. Financial incentives, tax benefits, and favorable regulations encourage businesses and homeowners to invest in rooftop solar installations, thereby bolstering market growth. The increasing awareness of environmental issues and the desire to reduce the carbon footprint are driving individuals and organizations to embrace clean energy solutions like rooftop solar PV, fostering market expansion. The Levelized Cost of Energy (LCOE) for solar PV has fallen by nearly 89% from 2010 to 2023, making solar energy one of the cheapest sources of electricity globally. In some regions, the LCOE of solar power has dropped to as low as USD 20- USD30 per MWh.

Technological Integration and Smart Grids

The U.S. Department of Energy (DOE) has allocated USD 3.46 billion for 58 projects across 44 states to enhance the resilience and reliability of the nation's electric grid. These initiatives, supported by the Bipartisan Infrastructure Law, will attract a total investment exceeding USD 8 billion, combining both federal and private sector contributions. The integration of rooftop solar PV systems with smart grid technologies is a significant driver in the market's growth. Smart grids enable efficient two-way communication between energy producers and consumers, optimizing energy distribution and consumption. Rooftop solar installations, when integrated into smart grids, allow for seamless monitoring, control, and optimization of energy production and consumption. This integration enhances the overall efficiency of the energy ecosystem, reducing wastage and ensuring maximum utilization of renewable energy resources. As the world moves towards a smarter and more interconnected energy infrastructure, the integration of rooftop solar PV systems with smart grids becomes a key driver propelling market expansion.

Job Creation and Economic Benefits

Job creation and economic benefits are fundamental drivers behind the growing momentum of the Global DG Rooftop Solar PV Market. As the renewable energy sector expands, it generates a substantial number of employment opportunities, ranging from manufacturing and installation to research, development, and maintenance. The demand for skilled professionals in engineering, solar technology, project management, and various supporting fields has surged, leading to a significant increase in job openings globally. The decentralized nature of rooftop solar installations ensures that jobs are created locally, stimulating regional economies. Small and medium-sized enterprises (SMEs) specializing in solar equipment manufacturing, installation services, and related technologies have flourished, driving entrepreneurship and innovation. The economic benefits of the DG rooftop solar PV market are multifaceted. By reducing electricity bills, businesses and households have more disposable income, leading to

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increased consumer spending. Furthermore, government incentives and subsidies aimed at promoting renewable energy adoption stimulate economic growth by encouraging investments in solar projects. The market also fosters a vibrant ecosystem of suppliers, contractors, and service providers, creating a multiplier effect on the economy. The shift towards renewable energy enhances a country's energy security, reducing reliance on imported fossil fuels and mitigating the impact of energy price fluctuations. Furthermore, the market's growth attracts foreign direct investments, fostering international collaborations and partnerships. These economic advantages, coupled with the positive environmental impact, position DG rooftop solar PV systems as a catalyst for sustainable economic development, creating a win-win scenario for both businesses and communities alike.

Key Market Challenges

Technical Integration and Compatibility

The Global DG Rooftop Solar PV Market faces significant challenges related to technical integration and compatibility issues. With a diverse range of solar PV technologies, inverters, and storage systems available, achieving seamless integration among different components poses a substantial hurdle. Incompatibility between various solar products can lead to operational inefficiencies, hindering the seamless flow of energy within rooftop solar installations. Standardization and compatibility across different solar equipment are vital to ensuring smooth integration and optimizing the overall performance of DG rooftop solar PV systems.

Reliability and Maintenance

Ensuring the reliability and maintenance of DG rooftop solar PV systems presents a notable challenge. Solar panels, inverters, and other components are exposed to varying weather conditions and environmental factors, leading to wear and tear over time. Proper maintenance is crucial to maximizing the system's efficiency and longevity. However, challenges arise in establishing effective maintenance protocols, especially for residential rooftop installations. Limited awareness and access to qualified technicians can result in delayed or inadequate maintenance, impacting the overall performance of rooftop solar PV systems.

Grid Integration and Energy Storage

The integration of DG rooftop solar PV systems with the existing electrical grid and energy storage solutions is a significant challenge. Balancing the intermittent nature of solar energy generation with the continuous and stable energy demands of consumers requires sophisticated grid management and energy storage technologies. Storage solutions, such as batteries, face challenges related to efficiency, cost, and environmental impact. Ensuring grid compatibility and grid stability when integrating excess energy generated by rooftop solar installations into the grid requires advanced grid infrastructure, which is often a complex and costly endeavor.

Financial Barriers and Incentives

Financial barriers and the lack of adequate incentives pose challenges to the widespread adoption of DG rooftop solar PV systems. While the long-term savings from reduced electricity bills are evident, the initial investment required for installing solar panels can be a barrier for many consumers and businesses. Access to affordable financing options and government incentives, such as tax credits and subsidies, play a crucial role in overcoming these financial challenges. Navigating complex incentive programs and understanding the financial benefits of rooftop solar installations can be daunting for potential customers, hindering their decision-making process.

Regulatory Complexity and Permitting

Navigating the regulatory landscape and obtaining necessary permits for DG rooftop solar PV installations is a challenging aspect of the market. Regulations related to building codes, zoning laws, and grid interconnection standards vary widely across regions and countries. Understanding and complying with these regulations can be a complex and time-consuming process for consumers and solar installation providers. Streamlining the permitting process, providing clear guidelines, and standardizing regulatory requirements are essential to reducing the regulatory burden and encouraging the adoption of rooftop solar PV systems on a broader scale. Industry advocacy and collaboration with regulatory authorities are pivotal in addressing these challenges and fostering a conducive environment for the DG rooftop solar PV market to thrive.

Key Market Trends

Technological Advancements and Integration

The Global DG Rooftop Solar PV Market is witnessing rapid advancements in technology, leading to the integration of innovative solutions. Enhanced solar panel efficiency, improved energy storage systems, and intelligent grid integration technologies are

driving market trends. These advancements enable DG rooftop solar PV systems to generate more electricity from sunlight, store excess energy efficiently, and seamlessly integrate with existing electrical grids. Smart inverters and monitoring systems are becoming integral components, allowing real-time data analysis and system optimization. As technology continues to evolve, DG rooftop solar PV installations are becoming more sophisticated, efficient, and user-friendly, meeting the diverse needs of consumers and businesses. The efficiency of solar panels has steadily improved, with commercial solar panels now achieving efficiency rates of 18-22%, compared to around 10-15% a decade ago. Emerging technologies like perovskite solar cells and bifacial solar modules are expected to push efficiencies above 25% in the coming years.

Decentralization and Energy Independence

A notable trend in the Global DG Rooftop Solar PV Market is the shift towards decentralization and energy independence. Businesses and homeowners are increasingly recognizing the benefits of generating their own electricity on-site. DG rooftop solar PV installations provide a decentralized energy source, reducing reliance on centralized power grids. This trend empowers consumers to have greater control over their energy production, consumption, and costs. Energy independence not only enhances resilience during grid outages but also contributes to sustainable practices by reducing dependence on fossil fuels, aligning with global efforts to combat climate change.

Hybrid Systems and Energy Diversification

Hybrid DG rooftop solar PV systems, incorporating solar panels with energy storage solutions and other renewable energy sources like wind or hydroelectric power, are gaining prominence. These systems offer a holistic approach to energy generation and storage, ensuring a consistent power supply even in variable weather conditions. Energy diversification enhances reliability and stability, making hybrid systems a popular choice for consumers and businesses seeking uninterrupted energy supply. Integrating DG rooftop solar PV with other renewable sources contributes to energy resilience and fosters a more sustainable energy ecosystem.

Smart Grid Integration and Demand Response

The integration of DG rooftop solar PV systems into smart grids is a significant trend shaping the market. Smart grids enable bidirectional communication between energy producers and consumers, optimizing energy distribution based on real-time demand and supply data. DG rooftop solar PV installations play a crucial role in demand response programs, allowing consumers to adjust their energy usage patterns based on grid conditions and pricing. This integration promotes energy efficiency, reduces peak demand, and minimizes grid strain, ensuring a balanced and sustainable energy supply. Smart grid technologies enhance the overall performance of DG rooftop solar PV systems, making them an integral part of modern energy infrastructures.

Environmental Sustainability and Corporate Initiatives

Environmental sustainability is a key trend driving the Global DG Rooftop Solar PV Market. Businesses and organizations are increasingly adopting rooftop solar installations as part of their sustainability initiatives. Corporate entities are investing in solar energy to reduce their carbon footprint, meet renewable energy targets, and demonstrate environmental responsibility. Government incentives and corporate social responsibility (CSR) programs further encourage the adoption of DG rooftop solar PV systems. As environmental consciousness continues to grow, businesses embracing solar energy solutions are not only meeting their sustainability goals but also contributing to a greener and more sustainable future.

Segmental Insights

End-User Insights

The commercial sector emerged as the dominant segment in the Global DG Rooftop Solar PV Market, and it is anticipated to maintain its dominance throughout the forecast period. The commercial sector's dominance can be attributed to several factors, including the large roof spaces available in commercial buildings, higher energy consumption levels, and a growing awareness of corporate social responsibility and environmental sustainability. Businesses and enterprises across various industries, such as retail, hospitality, and offices, have increasingly adopted rooftop solar PV systems to reduce operational costs, lower their carbon footprint, and demonstrate environmental stewardship. Favorable government policies, tax incentives, and grants aimed at promoting renewable energy adoption in the commercial sector have incentivized businesses to invest in rooftop solar installations. The desire for energy independence and the need to hedge against rising electricity prices have further driven the adoption of DG rooftop solar PV systems among commercial entities. As technology continues to advance, making solar installations more efficient and cost-effective, businesses find it increasingly viable to invest in solar energy solutions. The

commercial sector's inclination toward sustainable practices aligns with the global shift towards renewable energy sources, ensuring its continued dominance in the Global DG Rooftop Solar PV Market.

Regional Insights

The Asia-Pacific region emerged as the dominant force in the Global DG Rooftop Solar PV Market, and it is anticipated to maintain its supremacy during the forecast period. Several factors contributed to the region's dominant position, including rapid urbanization, escalating energy demands, favorable government policies, and substantial investments in renewable energy initiatives. Countries like China, Japan, India, and Australia spearheaded the adoption of DG rooftop solar PV systems, leveraging their large population bases and increasing industrialization. China, in particular, played a pivotal role, being a global leader in solar panel production and deployment. Supportive government incentives, feed-in tariffs, and net metering policies encouraged businesses and homeowners to invest in rooftop solar installations, further boosting the market. The region's robust manufacturing capabilities, coupled with economies of scale, led to a significant reduction in the overall cost of solar PV systems, making them more accessible to a wider consumer base. Furthermore, rising environmental awareness and the need for energy security have driven countries in the Asia-Pacific to prioritize renewable energy sources, with rooftop solar PV being a prominent choice. As these trends persist and the region continues to invest in renewable energy infrastructure, the Asia-Pacific region is poised to maintain its dominance in the Global DG Rooftop Solar PV Market, shaping the market's trajectory in the coming years.

Key Market Players

- ☐☐SunPower Corporation
- ☐☐Canadian Solar Inc.
- ☐☐JinkoSolar Holding Co., Ltd.
- ☐☐TrinaSolar Co., Ltd.
- ☐☐First Solar, Inc.
- ☐☐Hanwha Corporation
- ☐☐JA Solar Technology Co., Ltd.
- ☐☐Yingli Energy Development Company Limited
- ☐☐Risen Energy Co., Ltd.
- ☐☐LONGi Green Energy Technology Co., Ltd.

Report Scope:

In this report, the Global DG Rooftop Solar PV Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

☐☐DG Rooftop Solar PV Market, By Capacity:

- o up to 10 kW
- o 11 kW ☐ 100 kW
- o Above 100 kW

☐☐DG Rooftop Solar PV Market, By End-User:

- o Residential
- o Commercial
- o Industrial

☐☐DG Rooftop Solar PV Market, By Region:

- o North America
 - ☐ United States
 - ☐ Canada
 - ☐ Mexico
- o Europe
 - ☐ France
 - ☐ United Kingdom
 - ☐ Italy
 - ☐ Germany

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- India
- Japan
- Australia
- South Korea
- Indonesia
- Vietnam
- o South America
- Brazil
- Argentina
- Colombia
- Chile
- Peru
- o Middle East & Africa
- South Africa
- Saudi Arabia
- UAE
- Turkey
- Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global DG Rooftop Solar PV Market.

Available Customizations:

Global DG Rooftop Solar PV market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

□□ Detailed analysis and profiling of additional market players (up to five).

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