

Japan Solar Water Heater Market Assessment, By System [Active Solar Water Heating Systems, Passive Solar Water Heating Systems], By Collector Type [Glazed, Unglazed], By End-user [Residential, Commercial, Industrial], By Region, Opportunities and Forecast, FY2018-FY2032F

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Report description:

Japan solar water heater market is projected to witness a CAGR of 6.07% during the forecast period FY2025- FY2032F, growing from USD 164.73 million in FY2024 to USD 263.95 million in FY2032. The market has experienced significant growth in recent years and is expected to maintain a strong pace of expansion in the coming years.

Multiple factors contribute to the growth of the solar water heater market in Japan, such as supportive government policies, economic incentives, technological advancements, and a push towards lowering the country's carbon footprint. The solar water heater helps to reduce dependence on fossil fuels and supports the production of hot water at a low cost, which attracts the residential sector to invest in the system. Furthermore, the country is looking for an energy transition in the industrial sector by enabling the use of hot water generated from solar energy. The production of hot water from solar water heater technology is becoming a low-cost energy source, which drives the demand for solar water heaters in different sectors.

Moreover, local manufacturers of solar water heaters are adopting innovative technology, which is leading to higher efficiency of the device to hold hot water for a longer duration, which leads to driving the market for solar water heaters in the country. Furthermore, the government's strategic planning and investments in innovative technologies will bolster Japan solar water heater market size in the forecast period. The government is introducing mandatory mandates for the adoption of solar water heaters for new construction buildings, which creates opportunities for the market. Even, the country is aiming for carbon neutrality and set various targets for renewable energy production, which drives the demand for solar water heater technology in the market. For instance, according to a report released by the Ministry of Economy, Trade, and Industry with the goal to zero out carbon emissions by 2050 in Japan. To attain the set goals which may require a solar capacity to reach power generation and hot water generation. This development will increase the demand for rooftop solar water heater installations in the country.

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Inclination Towards Long Lifespan and Cost-Efficient Water Heating Systems in the Residential Sector

The residential sector is increasingly adopting renewable energy sources to generate hot water. Solar water heater systems significantly lower electricity expenses by allowing homeowners to produce hot water from renewable energy on-site. The cost of solar energy generated on-site is often cheaper than grid electricity, leading to substantial savings over time and driving demand for solar water heaters in the residential sector.

The advanced features of solar water heating technology can effectively address the key concerns homeowners may have with other water heating systems. Solar water heaters are durable, easy to use, and have low maintenance costs due to the use of advanced solar panels, which boosts confidence in the residential sector to invest in solar technology for water heating applications. Moreover, advancements in materials and technology have reduced the maintenance needs for modern solar water heater systems, expanding their market potential in residential areas. The low-maintenance requirements of these systems make them financially viable for a broader demographic across the country.

Solar water heaters come with warranties of around 20 to 25 years, assuring homeowners of a long lifespan and minimal need for panel replacements. The average lifespan of solar water heaters is greater than that of gas or electric water heating systems, driving demand for solar water heaters in the market. These systems can withstand harsh environments and are long-lasting, which reduces the frequency of repairs and replacements, making solar systems a more dependable source of power for homes. Homeowners view solar water heater installation as a long-term investment with a strong return, further fostering demand in the market.

Solar water heaters can drastically reduce energy bills with savings of 70-80% on electricity or fuel expenses. Solar-powered water heaters showcase rapid investment returns within 3-4 years and align with financial incentives with ecological initiatives. This development drives the demand for solar water heaters in the market.

Rising Adoption of Efficient Technologies in Water Heating Systems

Manufacturers are adopting advanced technologies related to production processes and high-quality materials to produce solar water heaters. Moreover, the adoption of advanced solar panels enables solar water heaters to generate hot water in low-temperature conditions. The high-quality features of these panels increase the market potential of solar water heaters, especially in urban areas. Systems made with new materials and solar panels are highly efficient, resulting in higher production of hot water. The use of innovative materials will improve the holding capacity of hot water for longer durations, driving demand for solar water heaters in the market.

The adoption of advanced manufacturing techniques in the production of solar water heaters enhances the efficiency of the devices and reduces the costs associated with hot water production. In addition, low-cost panels make the market more competitive, making the country's solar water heater market attractive. Furthermore, improvements in the efficiency of solar panels increase output per watt, making solar water heater installations a more economically viable option for both residential and commercial sectors.

For instance, in May 2024, Researchers from Chiba University in Japan designed a heat pump system integrating photovoltaic-thermal (PVT) technology to produce energy that will be used to produce hot water in the residential sector. This development will showcase that upgrades are coming to the market, which will drive demand.

Government Incentives and Policy Support Create Opportunities in Solar Water Heater

The country is introducing new renewable energy policies with a focus on high-efficiency technologies that help achieve emission reduction targets. The Japanese government supports technological innovation through funding programs and tax incentives to improve renewable energy technologies. Furthermore, the Japanese government has introduced a wide range of policies that significantly support the growth of solar water heater installations in the country. These financial benefit measures and create opportunities for both residential and commercial sectors to adopt solar technologies, contributing to Japan's renewable energy goals.

Japanese government and higher authorities offer additional subsidies, grants, and low-interest loans to encourage the use of solar water heaters in the residential sector. These subsidies significantly reduce the upfront installation costs of solar water heater systems, making adoption easier in the market. Moreover, government policies are continuously evolving and expanding investments in solar water heaters across the country, creating market opportunities in the coming years.

For instance, in July 2024, the government launched the "Housing Energy Saving 2024 Campaign," which aims to achieve carbon

neutrality in 2050. The main aim of the campaign is to promote energy conservation in the household sector by improving home insulation and introducing high-efficiency water heaters. This development will help increase the demand for solar water heaters in the market.

Active Solar Water Heating Systems to Dominate the Market Share

Active solar water heating systems have the largest market share and dominate the market. They are highly efficient in countries where freezing temperatures are uncommon. These systems allow for quick water heating, maximizing solar energy utilization during sunny days, which drives their demand in the market. Generally, they are less expensive to install, making them an attractive option for solar water heaters manufacturers. Furthermore, active solar water heating systems can incorporate advanced solar technologies, increasing market demand.

The system is equipped with advanced pump technology, which enhances the reliability and efficiency of hot water production. By utilizing renewable solar energy, the systems contribute to reducing carbon footprints and promoting sustainable energy practices, which drives their demand in the market. In addition, upcoming government policies and subsidies aimed at promoting the production of solar energy technologies devices encourage manufacturers to adopt active solar water heating systems and create a market opportunity for growth in the forecast period.

Central Region Leads the Solar Water Heating Market Share in Japan

The central region has dominated Japan's solar water heating market and is expected to continue this trend during the forecast period. Several factors, such as policy mandates, rising electricity prices, urbanization challenges, and heightened public awareness, are creating robust demand for the growth of solar water heaters in the region. Solar water heater technology is becoming increasingly attractive in the residential and commercial sectors of densely populated cities such as Tokyo. The government is introducing policies to encourage the residential sector to invest more in solar technologies, which helps reduce dependency on grid sources. Moreover, local governments are offering various subsidies and financial incentives to promote investment in solar water heater technologies.

For instance, the Japanese government is implementing mandatory policies in Tokyo to promote the adoption of rooftop solar technologies for generating power and hot water facilities. From the start of April 2025, all new system mandates will be implemented, including the installation of solar power. As per the mandate, houses that begin construction in the current year will need to prepare for solar installation technologies in the future. This development showcases the government's steps towards the adoption of solar technologies.

Future Market Scenario (FY2025 – FY2032F)

□ Japan is expected to implement policies that favor adopting high-efficiency solar technologies among various end users, which will foster the demand for solar water heaters in the coming years.

□ Japan aims to increase the share of renewable energy to 36-38% of its energy mix by 2030, which will boost the demand for solar water heaters in coming years.

□ Continuous research and development (R&D) in solar technology will improve the heater's efficiency and durability, driving the market demand for solar water heaters.

□ Japanese companies are committing to sustainability goals and carbon reduction targets, which will drive demand for renewable energy solutions in the country during the forecast period.

Key Players Landscape and Outlook

Continuous innovation characterizes the landscape of solar water heaters, as the companies compete in terms of energy efficiency, product life, and unique features. The market outlook remains positive, owing to increasing investment in the production of solar water heaters and a rise in the adoption of renewable sources of energy to produce hot water in the residential sector. Solar water heater manufacturers are promoting their products with improved system efficiency and competitive pricing, along with technical support, to drive growth in the solar water heater market. Product launches, agreements, business expansions, collaborations, certifications, and developing technologies are projected to increase competition in the fast-paced market.

For instance, in December 2022, Azuma Solar Co., Ltd. was selected by the ESQR (European Society for Quality Research) to receive the ESQR's European Award for Best Practices 2022. Company have received the award for delivering high-quality products and services to customers. The recognition helped the company to increase their market share.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work

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