

## **Solar Control Glass Market Size Analysis Report - Market Share, Forecast Trends and Outlook (2025-2034)**

Market Report | 2025-07-15 | 154 pages | EMR Inc.

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### **Report description:**

The global solar control glass market reached an estimated value of more than USD 6.56 Billion in 2024. The global market is expected to register a CAGR of 9.10% during the forecast period of 2025-2034 to reach a value of USD 15.67 Billion by 2034.

#### Global Solar Control Glass Market Growth

Solar control glass is a specifically manufactured coated glass that is designed by the glass industry to reduce the amount of heat passing through the glass while allowing sunlight to pass through it. It acts as a one-stop solution to stop heat-related issues and it is extensively used in buildings and cars.

The increasing demand for carbon reduction in automobiles is a major factor affecting the growth of the solar control glass market. The surge in demand for solar control glass can be attributed to its advantage of providing cooling effects regardless of environmental conditions and without the need for an air conditioning unit.

#### Solar Control Glass Market Trends

Increasing emphasis on green construction can aid market growth as the application of solar control glass keeps rising in commercial and residential buildings. Green constructions utilise non-toxic construction materials and are aimed to reduce pollution and waste generation while using renewable energy.

The demand of solar control glass market is rising owing to the multiple benefits it provides, including cooling of the interior, energy savings, protection from UV rays, and cost-effectiveness. In the long term, solar control glass can be more cost-effective than regular clear glass.

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## Recent Developments

As per the solar control glass market dynamics and trends, Saint Gobain Glass announced the addition of COOL-LITE SKN 175 to the COOL-LITE family of selective solar control coatings in March 2024, which meets the demand for reduced energy consumption.

## Industry Outlook

Driving factors for the growth of the solar control glass industry include the rising adoption of solar control glass in high-rise buildings to cut air conditioning costs and the growing use of advanced sputtering techniques to improve glass performance in blocking UV and infrared radiation.

According to the International Energy Agency (IEA), the global air conditioner installations demonstrated significant growth from 2018 to 2023, with projections indicating continued expansion through 2030. In 2018, the total number of installed units globally was 1,761.3 million, increasing to 2,212.2 million by 2023, reflecting a CAGR of 4.7%.

As per the solar control glass industry analysis, in the United States, air conditioner installations rose from 386.5 million units in 2018 to 416.9 million units in 2023, resulting in a CAGR of 1.5% over the 2018-2024 period. The U.S. market share of global installations declined from 21.9% in 2018 to 18.8% in 2023, with a further decrease projected to 15.1% by 2030. This trend indicates a slower growth rate in the U.S. compared to the global average.

China experienced a substantial increase in air conditioner installations, growing from 643.4 million units in 2018 to 862.1 million units in 2023, with a strong CAGR of 6.0%. China's market share rose significantly from 36.5% in 2018 to 39.0% in 2023, which further contributed to the solar control glass industry revenue. Projections suggest that by 2030, China will maintain a high market share at 37.7%, underscoring its dominant position in the global market. The increasing installations of air conditioners globally correlate with the expanding market for solar control glass. As more buildings and homes equip air conditioners, the demand for energy-efficient materials, such as solar control glass, increases to reduce energy consumption and enhance cooling efficiency.

Japan and Korea saw slower growth, with their combined installations increasing from 211.7 million units in 2018 to 226.8 million units in 2023, translating to a CAGR of 1.4%. Their global market share dropped from 12.0% in 2018 to 10.3% in 2023, with a further decline to 8.2% projected by 2030. This suggests that other regions are outpacing Japan and Korea in air conditioner installations.

The European Union's air conditioner installations grew from 104.9 million units in 2018 to 130.9 million units in 2023, achieving a CAGR of 4.5% and boosting the solar control glass demand. The EU's global market share remained stable, decreasing slightly from 6.0% in 2018 to 5.9% in 2023, and is expected to reach 5.6% by 2030. This steady growth reflects the increasing demand for energy-efficient cooling solutions in Europe.

India witnessed the highest growth rate among the regions, with its air conditioner installations soaring from 35.6 million units in 2018 to 78.7 million units in 2023, resulting in a remarkable CAGR of 17.2%. India's global market share increased from 2.0% in 2018 to 3.6% in 2023 and is projected to rise to 8.0% by 2030. This surge is driven by rising incomes, urbanization, and the increasing need for cooling solutions.

Indonesia also showed significant growth, with its installations increasing from 15.8 million units in 2018 to 31.2 million units in 2023, achieving a CAGR of 14.6%. Indonesia's global market share rose from 0.9% in 2018 to 1.4% in 2023 and is expected to reach 2.4% by 2030. This rapid growth is indicative of increased economic development and higher living standards in the region.

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Mexico's air conditioner installations grew from 18.1 million units in 2018 to 26.9 million units in 2023, with a CAGR of 8.3%. Mexico's global market share saw a slight increase from 1.0% in 2018 to 1.2% in 2023 and is projected to be 1.6% by 2030, which can enhance the solar control glass market value. This steady growth is driven by rising temperatures and greater adoption of cooling systems.

The Middle East region also showed growth, with its installations rising from 51.5 million units in 2018 to 67.6 million units in 2023, a CAGR of 5.6%. The Middle East's global market share increased from 2.9% in 2018 to 3.1% in 2023 and is expected to reach 3.4% by 2030. This growth is attributed to the region's extreme climate conditions and the increasing adoption of air conditioning.

As per the solar control glass market analysis, overall, the global air conditioner installations are projected to reach 2,993.9 million units by 2030, driven by rising temperatures, urbanization, and economic growth, particularly in developing regions. The expanding market for air conditioners is expected to further fuel the demand for energy-efficient solutions like solar control glass, which helps reduce energy consumption and enhance cooling efficiency.

Factors that are Strengthening the Growth of the Global Solar Control Glass Market along with Technological Advancements and Rising Awareness of Environmental Benefits:

- Implementation in High-Rise Buildings: The proliferation of high-rise buildings in urban areas like Shanghai and Dubai is driving the use of solar control glass to manage heat gain and enhance energy efficiency and aids solar control glass demand growth.
- Automotive Sector Innovations: Leading car manufacturers such as Tesla and BMW are incorporating solar control glass to improve electric vehicle range by reducing the load on air conditioning systems.
- Adoption in Smart Cities Projects: Major smart city projects, such as those in Singapore and Masdar City, are integrating solar control glass to meet sustainability targets and optimize energy use in buildings.
- Supportive Policies in Europe: The European Union's stringent building regulations, such as the Energy Performance of Buildings Directive (EPBD), are promoting the use of solar control glass to meet energy efficiency standards.

What Challenges are Impacting the Global Solar Control Glass Market?

- High Initial Costs: The upfront cost of solar control glass is higher compared to traditional glass, which can deter adoption, especially in cost-sensitive markets and among small-scale developers and influence solar control glass demand forecast.
- Technological Limitations: Current limitations in solar control glass technology, such as the inability to fully block UV rays while maintaining transparency, can affect performance and consumer satisfaction.
- Regulatory Variability: Inconsistent regulations and standards across different regions create challenges for manufacturers to develop universally compliant products, leading to increased production costs and complexities.
- Competition from Alternative Solutions: The availability of other energy-efficient solutions, such as low-E glass and window films, poses significant competition, potentially limiting the market penetration of solar control glass.

Key Trends Shaping the Global Solar Control Glass Market

- Integration with Smart Home Systems: Development of solar control glass that integrates with smart home systems, allowing users to control light and heat levels through mobile apps and voice commands which can boost solar control glass market revenue.
- Advancements in Nanotechnology: Leveraging nanotechnology to create solar control glass with superior UV blocking and heat insulation while maintaining high transparency.
- Adoption in Net-Zero Energy Buildings: Incorporation of solar control glass in projects aiming for net-zero energy consumption, setting precedents for sustainable building designs.

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- Expansion in High-Growth Regions: The construction boom in regions such as Southeast Asia and the Middle East drives demand for solar control glass, with large-scale developments integrating this technology to meet energy efficiency standards.

#### Solar Control Glass Industry Segmentations

The EMR's report titled "Global Solar Control Glass Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

##### Market Breakup by Application

- Residential Buildings
- Commercial Buildings
- Automotive
- Others

##### Market Breakup by Region

- North America
- Europe
- Asia Pacific
- Latin America
- Middle East and Africa

#### Solar Control Glass Market Share

The market for solar control glass, based on application, can be bifurcated into residential buildings, commercial buildings, and automotive, among others.

Among these applications, commercial buildings are expected to extensively utilise solar control glasses and boost solar control glass market share. The increasing levels of carbon emissions due to various factors such as rising industrialisation have compelled many countries to invest in the development of green constructions. With the rapid development in emerging nations and stringent laws implemented by governments, the market can experience significant growth.

#### Competitive Landscape

##### Saint-Gobain Group

Saint-Gobain Group, founded in 1665, is a multinational corporation operating to provide integrated solutions for the renovation of public and private buildings, construction, and decarbonization of constructions. It is a French company, headquartered in Courbevoie, France. The company started working as a mirror manufacturer and has expanded its expertise in construction, production of high-performance and other materials.

##### Vitro S.A.B. de C.V.?

Vitro S.A.B. de C.V. is a widely known glass manufacturing company in the solar control glass market and is one of the largest in the world. The company was founded in 1909 and has been operating with the aim to enhance processes and operations with its expertise in glass manufacturing. The company has developed various products, such as automotive glass, glass containers for

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food and beverages, wine and liquor, cosmetics, and pharmaceuticals.

Guardian Industries Holdings, LLC?

Guardian Industries Holdings, LLC is a glass, ceramics, and concrete manufacturing company. It is one of the global leading companies in the market, founded in 1932. Their expertise lies in manufacturing various types of glass, such as high-performance glass float glass and coated and fabricated glass products, among others. The company also specialises in manufacturing automotive parts and building materials distribution.

Other solar control glass market players include Euroglas GmbH and Asahi India Glass Limited, among others.

Competitive Factors in the Global Solar Control Glass Market

- Technological Advancements: Firms developing solar control glass with superior nanotechnology coatings for enhanced UV blocking and heat insulation gain a significant market advantage.
- Customization Capabilities: Providing tailored solutions, such as specific coatings and tints to meet unique architectural requirements, helps companies attract premium projects and clients.
- Cost-Effective Manufacturing: Companies in the solar control glass industry that achieve high production efficiency and lower costs without compromising quality can dominate price-sensitive markets.
- Strong Distribution Channels: Establishing robust distribution networks ensures extensive market reach and quicker delivery times, crucial for meeting the demands of large-scale construction projects, globally.

Solar Control Glass Market Regional Analysis

Based on the regional market, the divisions include North America, Europe, the Asia Pacific, Latin America, the Middle East and Africa. The Asia Pacific region is likely to hold the largest market share owing to the rapid infrastructural development in the region. In addition, countries such as China and India are increasingly implementing strict regulatory terms on the usage of construction materials. With the increasing emphasis on the development of green constructions, the solar control glass market is expected to register significant growth over the coming years.

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