

Global Tubular Solar Collector Market Size Study & Forecast, by Type (All Glass Vacuum Tube, Glass-metal Vacuum Tube) and Application (Residential, Commercial, Industrial) and Regional Forecasts 2025-2035

<https://marketpublishers.com/r/G573BF595653EN.html>

Date: January 2026

Pages: 285

Price: US\$ 3,750.00 (Single User License)

ID: G573BF595653EN

Abstracts

The Global Tubular Solar Collector Market is valued at approximately USD 1.87 billion in 2024 and is projected to advance at a steady CAGR of 7.00% throughout the forecast period from 2025 to 2035, with historical data anchored in 2023 and 2024 and 2024 defined as the base year for estimation. Tubular solar collectors, widely recognized for their high thermal efficiency and superior performance in low-light and cold-climate conditions, function by capturing solar radiation through vacuum-sealed tubes and converting it into usable thermal energy. As governments, businesses, and households increasingly pivot toward clean and decentralized energy solutions, these collectors are being written into the larger narrative of energy transition, sustainability commitments, and long-term cost optimization.

Market momentum is being carried forward by rising electricity tariffs, growing environmental consciousness, and policy-backed incentives that are encouraging consumers to trade conventional heating systems for renewable alternatives. Tubular solar collectors, particularly vacuum tube variants, are being favored for their durability, modular installation, and reduced heat loss when compared to flat-plate counterparts. While upfront installation costs and space considerations continue to pose moderate restraints, continuous product innovation, improved manufacturing efficiencies, and integration with smart energy systems are helping the market push past these friction points and scale up adoption across diverse end-use landscapes.

The detailed segments and sub-segments included in the report are:

By Type:

All Glass Vacuum Tube

Glass-metal Vacuum Tube

By Application:

Residential

Commercial

Industrial

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Residential applications are expected to dominate the Global Tubular Solar Collector Market over the forecast horizon. This dominance is being shaped by rising adoption of solar water heating systems in single-family homes and apartment complexes, particularly in regions where energy costs are climbing faster than household incomes.

Residential consumers are increasingly leaning into tubular collectors as a long-term hedge against utility price volatility, while government rebates and net-zero housing initiatives are further nudging adoption forward. Although commercial and industrial installations are gaining visibility, residential usage continues to set the pace in terms of volume and installation frequency.

From a revenue standpoint, all glass vacuum tube collectors currently command the largest share of the market. Their simplified construction, corrosion resistance, and higher efficiency in colder and cloudy environments have made them the preferred choice across both developed and emerging markets. Glass-metal vacuum tubes, while offering structural robustness and longer service life in demanding industrial settings, contribute a smaller yet steadily expanding share of revenues. This dynamic underscores a market where efficiency-driven solutions lead today, while durability-focused innovations quietly build tomorrow's growth curve.

Geographically, Asia Pacific stands out as the market leader, underpinned by large-scale adoption in China and India, where supportive renewable energy policies, high solar irradiance, and mass residential deployment have created fertile ground for growth. Europe follows closely, driven by stringent carbon-reduction targets, mature green-building standards, and strong uptake in commercial and district heating applications. North America is emerging as a high-potential market, particularly in residential and light commercial segments, as energy resilience and sustainability move higher on policy and consumer agendas. Meanwhile, the Middle East & Africa and Latin America are gradually unlocking opportunities through solar-driven water heating projects tailored to regional climatic advantages.

Major market players included in this report are:

GREENoneTEC Solarindustrie GmbH

Apricus Solar Co., Ltd.

Viessmann Group

Himin Solar Energy Group

Sunrain Group

Bosch Thermotechnology

Ariston Holding N.V.

Kingspan Group

Solahart Industries

Racold Thermo Ltd.

A.O. Smith Corporation

Thermomax Ltd.

Alternate Energy Technologies, LLC

Sunda Solar Energy Technology Co., Ltd.

Solimpeks Solar Corp.

Global Tubular Solar Collector Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period - 2025-2035

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define the market size of different segments and regions in recent years and to forecast their performance through 2035. The report blends quantitative market modeling with qualitative industry insights to map out growth drivers, structural challenges, and emerging opportunity pockets within the Global Tubular Solar Collector Market. It further delivers a detailed evaluation of the competitive landscape and strategic initiatives of leading players, offering stakeholders a clear lens through which to navigate investment decisions and long-term market positioning.

Key Takeaways:

Market estimates and forecasts for 10 years from 2025 to 2035

Annualized revenue analysis at global and regional levels

In-depth geographical assessment with country-level insights

Competitive landscape profiling of major market participants

Strategic analysis of key business approaches and future growth pathways

Evaluation of the market's competitive structure

Comprehensive demand-side and supply-side analysis

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