

Building Integrated Photovoltaic Market by Technology (c-Si (Monocrystalline, Polycrystalline), Thin Film), Application (Roofing, Facades, Externally Integrated Systems), End User (Residential, Commercial, Industrial), Region - Global Forecast to 2029

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Abstracts

The building integrated photovoltaic market is expected to grow from an estimated USD 12.49 billion in 2024 to USD 27.41 billion by 2029, at a CAGR of 17.0% during the forecast period. Environmental restrictions on carbon reduction are becoming more stringent across the world, and governments are rewarding this, giving a boost to numerous goods and technologies, like BIPV systems, for sustainable construction practices. Improved efficiency, flexibility, and aesthetic aspects in photovoltaic technology are making BIPV products more viable for home and commercial applications. These are the key factors driving the growth of the building integrated photovoltaic market.

"Thin Film, by technology segment to be the fastest-growing market from 2024 to 2029"

Thin-film solar cells permit a large degree of flexibility, which allows them to integrate into much more surfaces and architectural designs, including curved or irregular surfaces, which is a demand that becomes more frequent in modern building designs. Being lighter than crystalline silicon, thin-film panels are easier to install on various structures without significant structural reinforcement. Their sleek, low-profile design also enhances the aesthetic appeal of buildings. Thin film technology works better in low-light conditions and with varied angles of sunlight, so it is more suitable for any urban setting where buildings may not always be exposed to direct sunlight throughout



the day. It can be observed that thin-film solar cells have a lower temperature coefficient compared to crystalline silicon, which essentially means they have less efficiency loss at higher temperatures. This characteristic is particularly advantageous in hot climates.

"Facades, by application, is expected to be the fastest-growing market from 2024 to 2029"

Facades have a larger and more vertical surface area than roofing, allowing them to capture sunlight throughout the day at a variety of angles. This may be particularly relevant in urban locations where roof space is relatively small. Having innovative facades that are able to integrate photovoltaic cells in such a way that they enhance the aesthetic appeal of a building while carrying out their practical function of energy generation may speak well to architects and developers. BIPV systems in building facades—aside from their insulation, which contributes to an energy-efficient reduction of both heating and cooling loads—have the added ability to generate electricity, thus being cost-effective for energy management. Looking at the high rise of buildings in cities, the fa?ade is a gigantic, unexploited field of potential for the integration of solar technology, as most buildings have very small roof surfaces but very large vertical fields.

"Residential segment, by end user, is expected to be the fastest-growing market from 2024 to 2029"

Homeowners are more sensitive to environmental impact that comes from the consumption of energy. This drives the demand for sustainable energy solutions; hence BIPV, which enables the production of clean energy straight from their homes. For residential consumers, ways of reducing or minimizing the energy bills under relentless upward pressure in terms of the cost of energy used have been a front-burner concern. The BIPV system makes it a long-term solution since a home can independently produce a huge electric power amount that greatly reduces expenses on utilities. BIPVs are designed to fit various building materials; hence, it is also a friendly aesthetic option to homeowners for whom the appearance of their homes is critical. As consumer behavior is growing pro-environment, residential consumers now also wish to fulfill an inner whim of cutting on their carbon footprint. BIPV enables householders to contribute towards reduced greenhouse gas emission while using clean, renewable energy.

"Asia Pacific is expected to be the fastest-growing region in the building integrated photovoltaic market."



These countries in the Asia Pacific region are urbanizing at a rapid rate and have new construction markets on a large scale, hence providing much potential for integration of BIPV systems in modern buildings to meet their energy demands in a sustainable way. Another reason is that, in countries like the Asia Pacific region, especially China, Japan, and India, a lot of encouraging policies and financial incentives have been worked out in support of renewable energy and green building technologies, including BIPV. Strong economic growth in Asia Pacific countries drives investments into infrastructure and real estate development. On its side, such growth supports the adoption of state-of-the-art technologies like BIPV in new buildings. As a leading innovation hub for photovoltaic technologies, major manufacturers from the Asia Pacific region keep coming up with advanced BIPV technology, hence making it more efficient and attractive. Ambitious targets in the diffusion of renewable energy set by countries in this region are viewed as a way in which BIPV systems will spur growth in the market. Growing awareness about climate change and environmental sustainability influences building practices. The regional efforts to reduce carbon footprint and green building practices are aligned with the BIPV systems.

Breakdown of Primaries:

The key players in the market were identified through secondary research, and their market share in the respective regions was obtained through both, primary and secondary research. This entire process included the study of the annual and financial reports of the top market players and in-depth interviews for key insights with industry leaders such as chief executive officers, vice presidents, directors, sales managers, and marketing executives. All percentage shares, splits, and breakdowns were determined using secondary sources and verified through primary sources. All possible parameters that affect the markets covered in this research study were accounted for, viewed in extensive detail, verified through primary research, and analyzed to arrive at the final quantitative and qualitative data.

This study determined and confirmed the exact sizes of the parent market and each market through the data triangulation process and the validation of data through primaries.

By Company Type: Tier 1- 60%, Tier 2- 25%, and Tier 3- 15%

By Designation: C-Level- 35%, Director Level- 25%, and Others- 40%

By Region: North America – 25%, Europe – 25%, Asia Pacific – 30%, and Rest of the

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World - 20%

Note: Other designations include sales managers, marketing managers, product managers, and product engineers.

The tier of the companies is defined based on their total revenue as of 2023. Tier 1: USD 1 billion and above, Tier 2: From USD 500 million to USD 1 billion, and Tier 3: \$\$\$USD 500 million.

The building integrated photovoltaic market is dominated by a few major players that have a wide regional presence. The leading players in the building integrated photovoltaic market are LONGi (China), JinkoSolar (China), JA SOLAR Technology Co.,Ltd. (China), AGC Inc. (Japan), and Canadian Solar (Canada) among others. The major strategy adopted by the players includes new product launches, partnerships, collaboration, mergers, and investments & expansions.

Research Coverage:

The report defines, describes, and forecasts the building integrated photovoltaic market by technology, capacity, end-use application, and region. It also offers a detailed qualitative and quantitative analysis of the market. The report comprehensively reviews the major market drivers, restraints, opportunities, and challenges. It also covers various important aspects of the market. These include an analysis of the competitive landscape, market dynamics, market estimates in terms of value, and future trends in the building integrated photovoltaic market.

Key Benefits of Buying the Report

Increasing emphasis on net zero emissions and supporting government regulations are just a few of the primary drivers propelling the building integrated photovoltaic market. Regulatory and legislative uncertainties, as well as costly initial capital expenditure, limit the market's expansion. The ongoing energy shift to reduce carbon emissions is likely to provide attractive prospects for building integrated photovoltaic market participants.

Product Development/ Innovation: The building integrated photovoltaic market is seeing substantial product development and innovation, driven by rising environmental concerns. Companies are investing in improved building integrated photovoltaic technology.



Market Development: LONGi and Ferroglobe PLC have entered a long-term supply agreement starting January 1, 2024, emphasizing high-quality quartzite and metallurgical grade silicon supply for solar technology. LONGi aims to strengthen its position as a leading provider of eco-friendly solar products worldwide, promoting sustainable energy transformation and global cooperation in solar technology.

Market Diversification: JinkoSolar has partnered with RELC and Vision Industries to establish a joint venture in Saudi Arabia. This venture will build a high-efficiency solar cell and module manufacturing facility with a USD 1 billion investment. Expected to produce 10 GW annually of solar cells and modules, the project aims to advance Saudi Arabia's renewable energy efforts and global competitiveness, integrating JinkoSolar's advanced technology with local expertise.

Competitive Assessment: In-depth analysis of market share, growth plans, and service offerings of top companies in the stations market, including LONGi (China), JinkoSolar (China), JA SOLAR Technology Co.,Ltd. (China), AGC Inc. (Japan), and Canadian Solar (Canada) among others.





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