

Solar Shingles Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Type (Silicon Solar Shingles, Copper - Indium - Gallium - Selenide (CIGS) Solar Shingles, Others), By Roofing Type (New Roofing, Reroofing), By End User (Residential, Commercial, Industrial), By Region, Competition 2018-2028.

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Abstracts

Global Solar Shingles Market was valued at USD 375.8 Million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 4.8% through 2028. The solar shingle is a solar panel designed in such a way to integrate it into a conventional asphalt roof of the residential or commercial building without losing its aesthetic looks. They are installed similar to normal asphalt roof protect from rain and produce solar energy at the same time. Solar shingles are smaller in size and typically less than an inch thick to resemble as traditional roof tiles. The major advantage of solar shingles is that it adds sleek appearance compared to the traditional solar panel and produce extra power to save energy bills. Solar shingles also have few drawbacks which inhibit its growth such as huge installation cost and lower efficiency than the traditional solar panel. The market for solar shingles can be segmented on the basis of type, and geography. On the basis of type, the solar shingles are available in two types of photovoltaic panels such as Silicon solar shingles and, CIGS thin-film solar shingles. The CIGS thin-film solar shingle is the latest technology and widely accepted by lots of residential application. CIGS thin-film panel provides more flexibility, lightweight, and have the ability to bend per roof structure. The major driver for Solar Shingles Market is the increasing awareness about the clean energy and solar products along with adding aesthetic looks to their buildings. As the demand for solar-based electricity is increasing across the world, many companies are coming up with latest advanced solar modules

focusing on efficiency, cost, and design of the solar panel. The factor that is expected to inhibit the growth of the market is the huge installation cost. The solar shingles come in various types and are suitable for a different kind of requirement. Globally, the prices of the solar panel have gone down considerably over the years and the trend is going to follow in the forecast period.

Key Market Drivers

The solar shingle is a solar panel designed in such a way to integrate it into a conventional asphalt roof of the residential or commercial building without losing its aesthetic looks. They are installed similarly to a regular asphalt roof to provide both rain protection and solar energy production. Solar shingles are often less than an inch thick and smaller in size to mimic conventional roof tiles. The primary benefit of solar shingles is that they offer a modern aesthetic to standard solar panels and provide additional power to reduce energy costs.

Shingles Are Adaptable and Durable

As per the solar shingles market forecast, the shingles are adaptable and durable, which further adds to their attractiveness and enables them to be employed on a range of buildings. Homeowners are becoming more interested in the CIGS thin-film solar shingle due to its portability, flexibility, and adaptability. Traditional solar panels' need for a huge installation space is further reduced by the solar shingles. The global market for solar shingles is anticipated to benefit from these characteristics. Rapid urbanisation and rising consumer expenditure on house renovations and improvements are other important industry development drivers. Further factors that are projected to spur the adoption of solar shingles include rising pollution levels, longer utility bills, and growing environmental concerns about the use of fossil fuels for power generation.

The favorable regulatory environment for the use of renewable energy technologies as well as the increased efforts toward sustainable development are estimated to further extend profitable opportunities to the market players in the forecast period of 2022 to 2029. Increasing adoption of the alternative source of energy will boost the solar shingles market size. Carbon reduction has accelerated the adoption of renewable energies as the globe transitions to a sustainable energy system. Solar technology has dramatically improved, offering affordable solutions for decarbonizing the energy sector which is driving the solar shingles market trends.

As a result of the numerous advancements in technology and R&D in the electronics

sector, semiconductors are being employed across all electronic devices, in particular for those in the industrial sector creates the solar shingle market opportunity in coming years. Furthermore, the advancements related to solar energy harvesting coupled with the increasing investments in the development of manufacturing facilities are estimated to further provide solar shingle market growth.

GAF Energy is counting on the scale of the roofing industry to make solar more accessible. The roofing ecosystem is 20–30 times larger than solar. In the United States, 200,000–300,000 people get a new solar system each year which increases solar shingles market share. In a solar roof installation, Tesla installs tiles with solar power and some without. The company tries to optimize each roof by installing the tiles with solar cells where they would be more efficient. Tesla install the solar tiles over existing roofs. It specifies these two roof types: three-tab composition shingle and architectural composition shingle.

'In Oct 2016, Tesla announces the production plan for four different types of solar tiles into its manufacturing. The solar tiles will be produced by SolarCity factory due from 2017. Furthermore, in October 2019, Tesla announced its plans of launching Solar Roof V3, a new version of its solar roof tiles. The company also disclosed the ramping up of its solar roof tile production to 1,000 roofs per week through the end of the year.'

Adoption of solar shingles

In the solar shingles market analysis, there are several acts and standards that are set up to safeguard the use of solar shingle in residential, commercial & industrial are studied. The rules and standards regarding global solar industry trade, technology and manufacturing in the U.S is controlled by the Solar Energy Industries Association (SEIA®). The installation of PV systems and the majority of other electrical installations must adhere to the National Electrical Code (NEC). IEC 61730-1:2016 specifies and describes the fundamental construction requirements for photovoltaic (PV) modules in order to provide safe electrical and mechanical operation. IEC 61730-2 defines the requirements of testing. This International Standard series lays down IEC requirements of terrestrial photovoltaic modules suitable for long-term operation in open-air climates. This standard is intended to apply to all terrestrial flat plate module materials such as crystalline silicon module types as well as thin-film modules.

Key Market Challenges

The Main Challenge in the Global Solar Shingles Market: Cost and Affordability

Cost and affordability are the central challenges facing the global solar shingles market. While solar shingles offer numerous advantages, including aesthetic appeal and seamless integration into roofing, they tend to be more expensive compared to traditional solar panels. This cost factor creates a barrier to widespread adoption and necessitates a deeper examination.

Understanding the Cost Structure of Solar Shingles

To comprehend the challenge of cost and affordability in the solar shingles market, it is essential to delve into the cost structure and factors that contribute to the pricing of solar shingles:

Materials: Solar shingles are typically made from high-quality materials designed to withstand various weather conditions and provide long-term durability. These materials, including advanced photovoltaic cells and protective layers, can be costly.

Manufacturing Processes: The production of solar shingles involves advanced manufacturing processes to ensure the integration of solar cells with roofing materials. These processes often require precision and expertise, which can contribute to manufacturing costs.

Installation Costs: Solar shingle installation involves specialized labor and expertise. Installers need to ensure the shingles are correctly integrated with the existing roof structure. This adds to the overall cost, as professional installation is essential to maximize efficiency and maintain the integrity of the roof.

Aesthetic Considerations: Solar shingles are designed to blend seamlessly with conventional roofing materials, contributing to their aesthetic appeal. Achieving this level of integration may require extra engineering and design efforts, leading to increased costs.

R&D and Innovation: Ongoing research and development are crucial to improving the efficiency and durability of solar shingles. These investments in innovation can drive up the overall cost of the technology.

Economies of Scale: The solar shingle industry is still relatively niche compared to traditional solar panels. The economies of scale that large-scale solar panel manufacturers enjoy are not as readily available to solar shingle manufacturers, which

can result in higher costs.

Lack of Competition: The limited number of manufacturers in the solar shingle market can reduce competition, potentially leading to higher prices. A more competitive landscape could help drive down costs.

Challenges in Addressing the Cost Issue

Addressing the challenge of cost and affordability in the global solar shingles market is essential for realizing the full potential of this technology. Several factors complicate this effort:

Long Payback Period: The cost of solar shingle installation can have a long payback period. While homeowners and businesses can save money on energy bills over time, the initial investment can be a deterrent, especially for those with limited financial resources.

Incentives and Subsidies: Many regions offer incentives, tax credits, and subsidies to promote solar energy adoption. While these can help offset costs, they may not be sufficient to make solar shingles affordable for everyone.

Financing Options: Financing solutions, such as solar loans and power purchase agreements, can make solar shingle installations more accessible. However, these options may come with their own terms and interest rates, which can add to the overall cost.

Consumer Awareness: Many potential customers may not be fully aware of the long-term cost savings and environmental benefits associated with solar shingles. Raising awareness and educating consumers about these advantages is crucial to drive adoption.

Regulatory Challenges: Regulatory and permitting processes can vary by region and add complexity to solar shingle installations. Streamlining these processes can help reduce costs.

The Importance of Cost Reduction in the Solar Shingles Market

Addressing the cost and affordability challenge in the global solar shingles market is vital for several reasons:

Market Growth: Cost reduction is essential to stimulate market growth. As costs come down, more homeowners and businesses can afford to invest in solar shingles, leading to increased market demand.

Environmental Impact: Widespread adoption of solar shingles can significantly reduce greenhouse gas emissions and reliance on fossil fuels, making a substantial contribution to environmental sustainability.

Energy Independence: Solar shingles provide a means of producing clean energy on-site, reducing dependence on centralized energy sources and enhancing energy security.

Technological Advancement: As the market grows and competition increases, there is more incentive for research and development. This can lead to technological advancements that not only reduce costs but also improve the efficiency and durability of solar shingles.

Aesthetic Integration: Solar shingles have a unique advantage in that they can seamlessly blend with existing roofing materials. Making them more affordable would enable homeowners to embrace clean energy without compromising the aesthetics of their homes.

Approaches to Addressing the Cost Challenge

Several approaches can be taken to address the cost and affordability challenge in the global solar shingles market:

Research and Development: Continued investment in R&D can lead to innovations that reduce the cost of materials, manufacturing, and installation. Improved efficiency and durability can also increase the value proposition of solar shingles.

Economies of Scale: As the market grows and more manufacturers enter the space, economies of scale can be realized. This can lead to reduced manufacturing and installation costs.

Streamlined Installation: Simplifying the installation process, potentially making it accessible to a wider range of installers, can help lower labor costs and reduce the time required for installation.

Incentives and Financing: Governments and organizations can continue to offer incentives and financing options to make solar shingle installations more accessible. This includes tax credits, rebates, and low-interest loans.

Education and Awareness: Efforts to educate consumers about the long-term benefits of solar shingles can help overcome the initial cost barrier. Clear communication of the environmental and economic advantages is crucial.

Regulatory Support

Governments and regulatory bodies can streamline permitting processes and reduce bureaucratic hurdles associated with solar shingle installations. This can lower administrative costs and encourage adoption.

Competition: Encouraging more manufacturers to enter the solar shingle market can promote competition and innovation, potentially driving down costs. The global solar shingles market holds significant promise for the future of sustainable energy generation. Solar shingles offer a visually appealing and efficient way to integrate solar power into residential and commercial buildings. However, the main challenge in this market is the cost and affordability of solar shingle installations. High material, manufacturing, installation, and design costs, along with a lack of economies of scale, make solar shingles more expensive than traditional solar panels.

Addressing the cost challenge is critical to unlocking the full potential of solar shingles. This can be achieved through a combination of research and development, economies of scale, streamlined installation processes, incentives and financing options, consumer education, regulatory support, and increased competition in the market. As technology advances and market dynamics evolve, the solar shingles market may become more accessible and affordable, allowing a wider range of consumers to embrace clean energy solutions. Ultimately, addressing the cost challenge is vital for the continued growth and sustainability of the global solar shingles.

Key Market Trends

Increased Integration with Building Materials

Solar shingles were becoming more integrated with traditional roofing materials, leading to a more seamless and aesthetically pleasing appearance. This trend focused on

combining functionality with design, making solar shingles more appealing to homeowners and businesses.

Growing Residential Adoption: Residential solar shingle installations were on the rise. Homeowners were increasingly interested in harnessing solar energy for their households, partly due to environmental concerns and the potential for long-term cost savings on energy bills.

Advancements in Technology: Technological improvements were enhancing the efficiency and durability of solar shingles. This included better photovoltaic cell design, anti-reflective coatings, and enhanced weather resistance, making solar shingles more reliable and efficient.

Innovations in Thin-Film Solar Shingles

Thin-film solar shingles, which are more flexible and lightweight, were gaining popularity. These shingles could be more easily integrated into different roofing designs and were potentially more cost-effective.

Increased Awareness of Environmental Benefits: With a growing focus on sustainability and reducing carbon footprints, solar shingles were gaining attention for their environmental benefits. Consumers and businesses were increasingly drawn to the idea of clean energy production.

Government Incentives and Policies: Government incentives, tax credits, and rebates were encouraging solar shingle installations. Many regions were introducing policies to promote the adoption of solar energy, making it more financially appealing to consumers.

Energy Storage Integration: The combination of solar shingles with energy storage systems, such as home batteries, was becoming more common. This allowed for the storage of excess solar energy for use during cloudy days or at night, increasing the reliability of solar shingle systems.

Emerging Markets and Global Expansion: The global solar shingle market was expanding beyond its traditional strongholds in North America and Europe. Emerging markets, especially in Asia, were showing growing interest in solar shingle technology.

Customization and Scalability: Solar shingle systems were becoming more

customizable and scalable. Homeowners and businesses could choose the size and layout of their solar shingle arrays, making it easier to adapt the technology to their specific energy needs.

Competitive Landscape: The solar shingle market was becoming more competitive as additional manufacturers entered the field. This competition was expected to lead to innovations and potential cost reductions in the future.

Financial and Ownership Models: Different ownership and financing models, such as power purchase agreements (PPAs) and solar leasing, were being explored, allowing consumers to adopt solar shingles with minimal upfront costs.

Smart and Connected Shingles: Integration of smart technology and monitoring systems into solar shingle installations was on the rise. This allowed homeowners and businesses to monitor energy production and consumption, optimizing their energy use.

Resilience and Backup Power: In regions prone to power outages or natural disasters, solar shingles were increasingly viewed as a means of providing backup power. This feature gained importance, especially in the face of climate change-related events. The solar energy market is dynamic, and new trends and developments may have emerged since my last update. To get the most current information on trends in the global solar shingles market, I recommend consulting industry reports, news sources, and market research studies specific to the solar industry.

Segmental Insights

End User Insights

The residential segment is dominating the solar shingle market. In 2021, the residential segment accounted for over 80% of the global solar shingle market. This is due to a number of factors, including Solar shingles offer a number of advantages over traditional solar panels, such as a more seamless and aesthetically pleasing appearance, improved durability, and easier installation. Many countries and states offer tax credits and other financial incentives to homeowners who install solar shingles. The cost of electricity has been rising steadily in recent years, making solar shingles a more attractive option for homeowners who want to reduce their energy bills. The residential solar shingle market is expected to continue to grow in the coming years, driven by the factors listed above. Additionally, the development of new solar shingle technologies, such as thin-film solar shingles, is expected to make solar shingles more affordable and

accessible to homeowners.

Regional Insights

Region-wise, the market is studied across North America, Europe, Asia-Pacific, And LAMEA. Asia-Pacific dominates the solar shingle market in terms of market share and market revenue and will continue to flourish its dominance during the forecast period. Asia-Pacific is the highest revenue contributor during the forecast period. Owing to countries such as China, Australia, and Indonesia are expected to gain the largest market opportunity owing to increasing huge potential of planned solar projects in the coming years. The increased growth of the market as the favourable regulations encouraging the installation of solar shingle and increased consumer spending on home upgrades and retrofits within the region in the forecast period of 2022 to 2029.

Key Market Players

SunTegra Solar

Ergosun

CertainTeed

Canadian Solar

Ertex Solar

FlexSol Solutions B.V

Tesla

Anu Solar Power Pvt Ltd

PV Technical Services Inc.

Sunflare

Report Scope:

In this report, the Global Solar Shingles Market has been segmented into the following

Solar Shingles Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Type (Sili...

categories, in addition to the industry trends which have also been detailed below:

Global Solar Shingles Market, By Type:

Silicon Solar Shingles

Copper - Indium - Gallium - Selenide (CIGS) Solar Shingles

Others

Global Solar Shingles Market, By End User:

Residential

Commercial

Industrial

Global Solar Shingles Market, By Roofing Type:

New Roofing

Reroofing

Global Solar Shingles Market, By Region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

Japan

South Korea

Indonesia

Europe

Germany

United Kingdom

France

Russia

Spain

South America

Brazil

Argentina

Middle East & Africa

Saudi Arabia

South Africa

Egypt

UAE

Israel

Competitive Landscape

Solar Shingles Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Type (Sili...

Company Profiles: Detailed analysis of the major companies presents in the Global Solar Shingles Market.

Available Customizations:

Global Solar Shingles 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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