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US Collection

# Solar Roofing: United States

February 2022



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# About This Report

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## Scope

This report forecasts to 2025 US solar roofing demand in squares (one square equals 100 square feet). Total demand is segmented by application in terms of:

- new construction
- reroofing

Total demand is also segmented by region as follows:

- Northeast
- Midwest
- South
- West

To illustrate historical trends, total demand is provided in annual series from 2011 to 2021; the various segments are reported for 2020.

This report analyzes the US market for solar roofing, which is defined as those products that serve as a structure's primary roofing material while also producing solar-generated electricity. This report considers both solar roofing products equipped with photovoltaic (PV) modules and those roofing products on the same structure that do not feature those components. Solar roofing products covered by this report include those that resemble asphalt shingles, roofing tiles, and slate roofing.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Solar Roofing: United States* (FF60124) is based on *Solar Roofing*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group

- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

**Table 5 | NAICS & SIC Codes Related to Solar Roofing**

NAICS/SCIAN 2017 North American Industry Classification System		SIC Standard Industrial Classification	
221114	Solar electric power generation	1623	Water, sewer, pipeline, & communications & power line construction
237130	Power & communication line & related structures construction	1731	Electrical work
238160	Roofing contractors	1761	Roofing, siding, & sheet metal work
238210	Electrical contractors & other wiring installation contractors	2952	Asphalt felts & coatings
324122	Asphalt shingles & coating materials manufacturing	3259	Structural clay products, NEC
327120	Clay building material & refractories manufacturing	3674	Semiconductors & related devices
334413	Semiconductor & related device manufacturing	4911	Electric services
423330	Roofing, siding, & insulation material merchant wholesalers	5033	Roofing, siding, & insulation materials
423690	Other electronic parts & equipment merchant wholesalers	5065	Electronic parts & equipment, NEC
926130	Regulation & administration of communications, electric, gas, & other utilities	9631	Regulation & administration of communications, electric, gas & other utilities

Source: US Census Bureau

## Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most

accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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## Resources

### The Freedonia Group

*Solar Roofing*

### Freedonia Industry Studies

*Ceilings*

*Fiber Cement in the US*

*Global Ceilings*

*Global Fiber Cement*

*Global Foamed Plastic Insulation*

*Global Housing*

*Global Insulation*

*Global Power Tools*

*Global Roofing*

*Global Siding (Cladding)*

*Global Thermoplastic Elastomers*

*Global Windows & Doors*

*Green (Vegetative) Roofing*

*Gutters & Downspouts*

*Insulation*

*Liquid-Applied Roof Coatings*

*Lumber*

*Moulding & Trim*

*Prefabricated Housing*

*Roofing*

*Siding*

*Windows & Doors*

*Wood Panels*

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*Commercial Roofing: United States*

*Construction: United States*

*Energy: United States*

*Photovoltaic Solar Power: United States*

*Renewable Energy: United States*

*Residential Roofing: United States*

### Freedonia Custom Research

## Trade Publications

*Builder*  
*Engineering News-Record*  
*Greentech Media*  
*Journal of Light Construction*  
*Metal Construction News*  
*Metal Roofing*  
*pv magazine*  
*ProSales*  
*PV Tech*  
*Qualified Remodeler*  
*Remodeling*  
*Replacement Contractor*  
*Roofing Contractor*  
*Solar Builder*  
*Solar Industry*  
*Solar Power World*  
*Western Roofing, Insulation, & Siding*

## Agencies & Associations

National Association of Home Builders  
National Roofing Contractors Association  
United States Census Bureau  
United States Department of Energy  
United States Environmental Protection Agency  
United States Green Building Council  
United States International Trade Commission