

PROJECT: ROOFTOP PV ASSESSMENT // AI ALGORITHM v4.8
SYSTEM STATUS: ACTIVE // SCANNING...

LAT: 17.825° S
LON: 31.058° E

Injecta_Analytics

Beyond Location To **Intelligence**

THE ROOFTOP SOLAR PANEL MARKET

Industry | Residential

A snapshot of Harare's rooftop
solar market: who has gone solar,
who hasn't, and what that tells us

Energy Resilience

October 2026

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[SAT-SCAN // HARARE INDUSTRIAL MODE]

[PV ARRAY // DETECTED // CONF: 98.4%]

[BARE ROOF // OPTIMAL FOR PV
AREA: 4,120 m² // UNUTILIZED]

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SAT-SCAN // HARARE INDUSTRIAL MODE



CZI

Enterprise Leadership Service



**STRATEGIC
INTELLIGENCE
FORUM 2026**

CZI ANNUAL BUSINESS FORUM



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Industry Rooftop Solar Adoption

SAT-SCAN // HARARE INDUSTRIAL MODE

📍 INDUSTRIAL BUILDINGS IN THE COUNTRY

Nearly 6 in 10 industrial buildings sit in five towns and the work inside them is changing

The heat map shows the distribution of industrial buildings in the country

There are apprx.

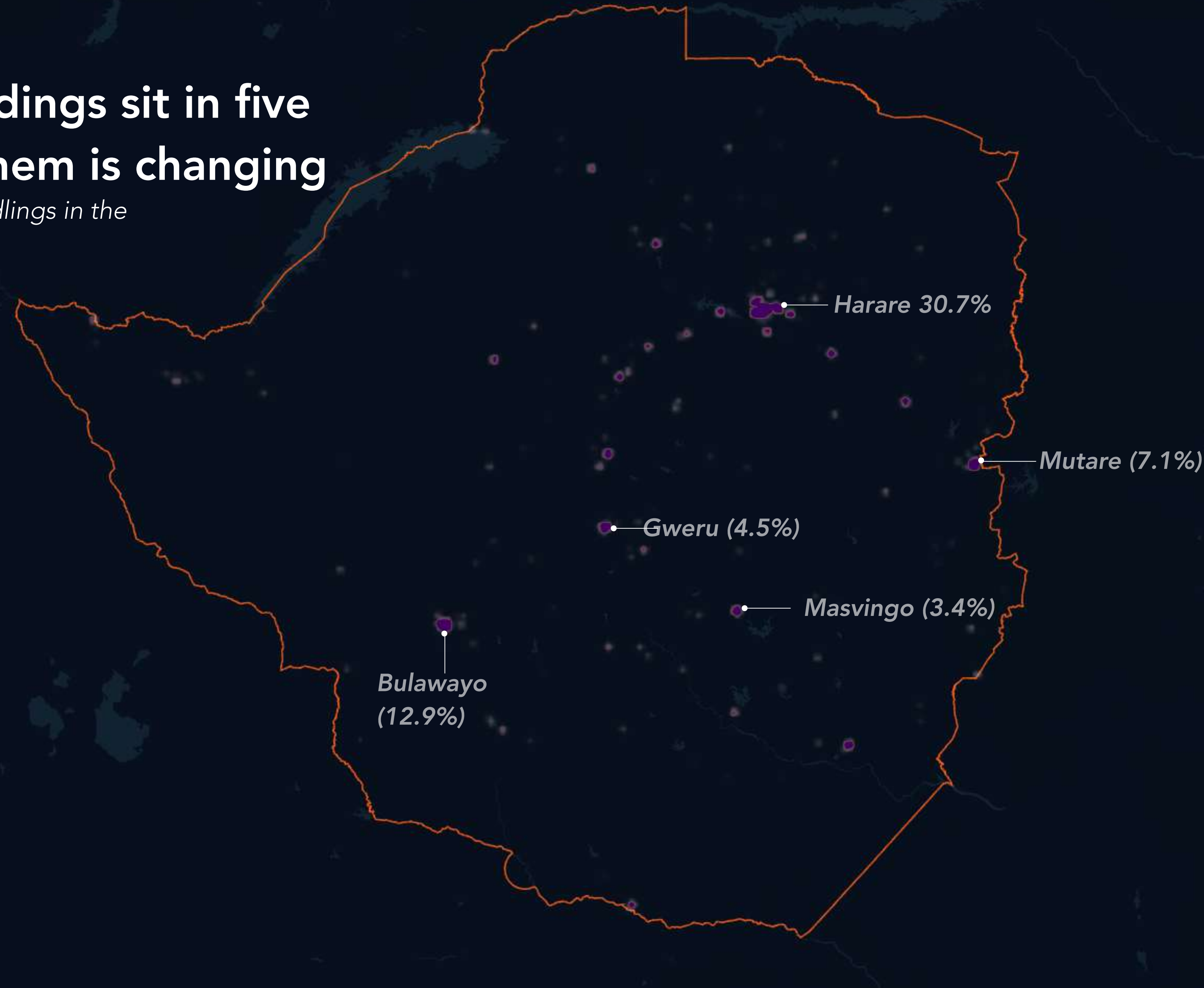
23,000

Industrial buildings in Zimbabwe

58.5% of industrial buildings sit in five towns.

Harare 7,106 · Bulawayo 2,979 · Mutare 1,644 ·
Gweru 1,036 · Masvingo 789.

DEPTH IS HARARE-FIRST: *Smaller towns cost less to enter, relatively, but they are thin to sell into: fewer buyers, smaller tickets.*



📍 THE CASE STUDY: SOUTHERTON AND WORKINGTON INDUSTRIAL AREAS

Only 1 in 18 industrial buildings has gone solar

1,703 industrial buildings in Workington and Southerton:
24% of Harare's industrial stock

97

of 1,703 buildings have rooftop solar

5.7%

of industrial buildings are solarised

2.48M m²

of industrial roof space

4.1%

of that roof is under panels

■ Installed Rooftop Solar (100,635 m²)
■ Total Rooftop Area (2,476,940 m²)

More roof, less solar: Southerton trails Workington

METRIC	WORKINGTON	SOUTHERTON
INDUSTRIAL BUILDINGS	795	908
TOTAL ROOF AREA	1.06M M²	1.42M M²
AVERAGE ROOF PER BUILDING	1,335 M²	1,559 M²
BUILDINGS WITH SOLAR	53 (1 IN 15)	44 (1 IN 21)
SHARE OF BUILDINGS WITH SOLAR	6.7%	4.9%
ROOF UNDER PANELS	4.8%	3.5%

Firms are sizing solar to the bill, not the roof

ROOF ISN'T THE BOTTLENECK: Southerton has more buildings and bigger roofs, but less solar

2.4 million m² of industrial roof is doing nothing

1.5 MW

TPZ's new rooftop system in Harare:
about 9,000 m² of roof.

11x

TPZ-sized systems already installed
across both industrial areas (about
17 MW)

130x

more TPZ-sized systems (200 MW) if
half the bare roof is usable; 260 if all
of it were

Indicative: assumes 6 m² of roof per kWp. Typically only
30-50% of roof is usable (structure, asbestos, orientation,
shading).



Residential Rooftop Solar Adoption

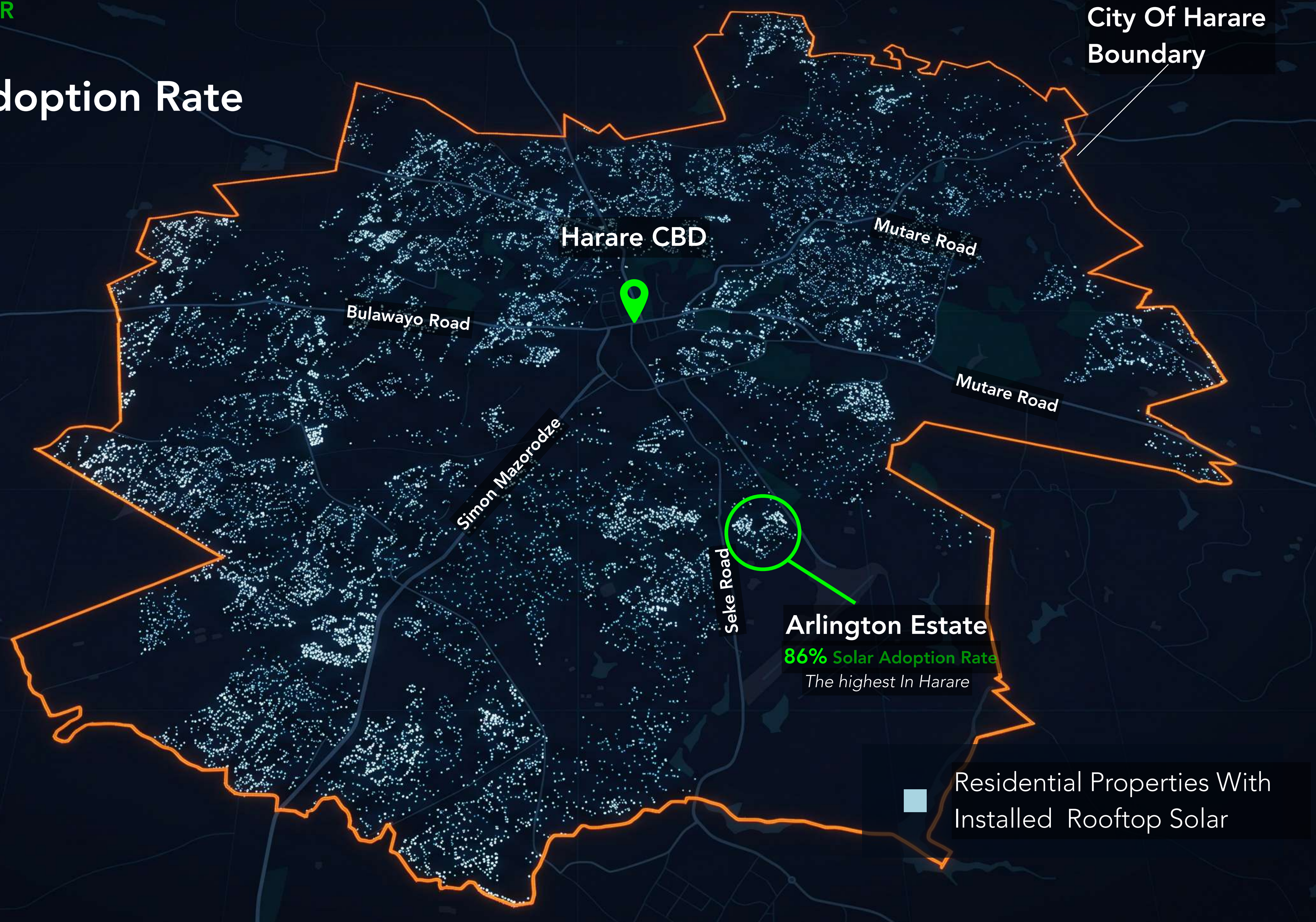
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Rooftop Solar Adoption Rate

There are approximately
60,000 residential
buildings with rooftop
solar panels in Harare

Harare has a **19%**
solar adoption rate

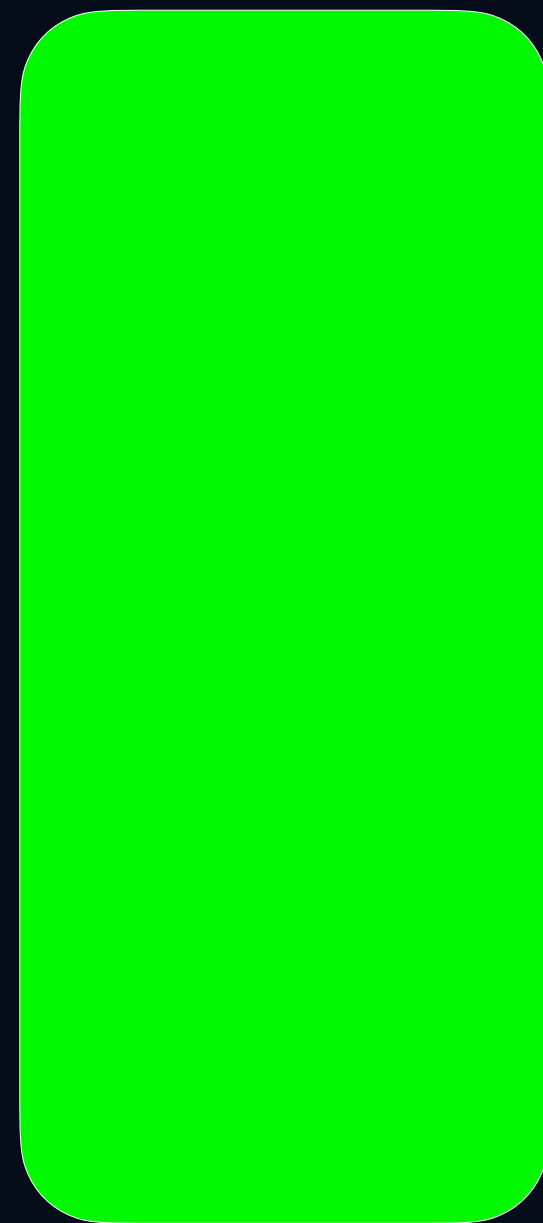




Harare Solar Adoption Rate At nearly 5× Mutare's

Rooftop Solar Adoption Rate

19 %



Harare

4%



Mutare

**SOLAR FOLLOWS SPENDING
POWER:** Harare homes out-
adopt Mutare about 5 to 1.

A solar roof is a signal: read the roof, read the economy

INDUSTRIAL · READ THE FIRM

A solar roof usually signals:

- Occupied and operating
- Access to capital
- Owns the roof: tenants rarely invest in a landlord's roof
- Uses power in daylight, and downtime is costly

RESIDENTIAL · READ THE SUBURB

Solar adoption is a proxy for affluence:

- Disposable income: inverters and batteries are paid out of pocket
- Higher adoption, higher affluence: Harare 19% vs Mutare 4%
- New installations indicate **new money** flowing into suburbs

THE PROXY: where suburb income data doesn't exist, the roofs show who has spending power.

WHO WE ARE

Zimbabwe's Location Analytics Company.

Injecta Analytics is Zimbabwe's leading location and decision intelligence company and the pioneer of the discipline in the country since our founding in 2021.

We combine proprietary spatial datasets with rigorous analytical frameworks to deliver decision-ready intelligence that helps businesses, investors and organisations commit capital, enter markets and optimise operations with confidence.

Our foundation is **location intelligence**. Our output is **decision intelligence**.

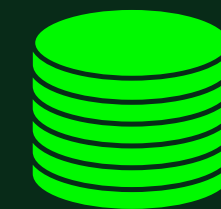
We start with location. We end with decisions.

SECTORS SERVED

Property & Real Estate · Financial Services · Retail & FMCG · Logistics & Supply Chain · Hospitality · Healthcare · Petroleum · Telecoms · Agriculture & NGOs

We exist to replace guesswork with intelligence. Every major investment decision has a location dimension - we make sure you know yours.

Injecta_Analytics



Proprietary Data

Unique Zimbabwe-specific datasets built through years of rigorous field collection across 50+ urban centres, covering 60+ categories across every dimension of Zimbabwe's economic landscape.



Rigorous Analytics

World-class spatial analytics applied to Zimbabwe's urban realities: demographic modelling, trade-area analysis, network analysis and competitive mapping to surface patterns, opportunities and risk.



Decision-Ready Intelligence

We don't stop at data. We deliver clear, actionable answers structured around your specific business question, working alongside specialists in finance, real estate and economics.

An aerial photograph of a city, likely Harare, Zimbabwe, showing a dense urban grid with numerous buildings, roads, and green spaces. The image is darkened with a semi-transparent black overlay to make the white and purple text stand out.

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Beyond Location To **Intelligence**

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