

# **Agrivoltaics Market - A Global and Regional Analysis: Focus on Product, Application, and Competitive Landscape, 2023-2033**

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## **Abstracts**

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### **Global Agrivoltaics Market Overview**

Companies involved in agrivoltaics can capitalize on this trend by investing in innovative technologies, developing partnerships with farmers and solar energy providers, and leveraging government incentives and policies supporting renewable energy. Strategic investments in research and development, along with the establishment of resilient production infrastructure, will be key for companies looking to capitalize on the expanding agrivoltaics market. By embracing these strategies, companies can position themselves as leaders in sustainable energy solutions for agriculture, shaping the future of the global agrivoltaics market and meeting the evolving needs of farmers and energy consumers worldwide.

### **Market Introduction**

The global agrivoltaics market, which integrates solar energy production with agricultural practices, is poised for significant growth in the coming years. The market is valued at \$1,768.8 million in 2022. The market is expected to expand rapidly, reaching an estimated \$15,871.6 million by the end of 2033. This growth is driven by several factors, including increasing recognition of the benefits of agrivoltaics in enhancing crop yields, reducing water usage, and maximizing land efficiency. Agrivoltaics offers a sustainable and efficient solution for both energy production and agricultural land use, aligning with the global shift toward more environment-friendly practices.

## Industrial Impact

The utility-scale solar farms, typically ranging from 1 MW to 2,000 MW, are known to sell their electricity to generate profits for their owners. The installation cost of solar farms usually falls between \$0.89 to \$1.01 per watt. On average, a 1 MW solar farm can earn around \$43,500 annually by selling its electricity to utilities. Landowners who lease their land for solar farms can expect to earn between \$250 to \$3,000 per acre per year. These findings underscore the economic viability and potential profitability of solar farm investments.

While comparing agrivoltaics to ground-mounted PV plants, researchers have found that agrivoltaics projects tend to be more expensive. This is primarily due to higher costs incurred during the approval process and design limitations, as well as the need for specialized components such as modules, mounting systems, and trackers. For instance, the inclusion of vertical plants or elevated modules to accommodate agricultural machinery underneath can significantly raise costs. The additional expenses for these components are estimated to range from \$268.68 to \$303.00 per kW for modules and from \$90.7 to \$240.6 per kW for racks.

## Market Segmentation:

### Segmentation 1: by Array Configuration

Fixed

Single-Axis Tracking

### Fixed Array to Dominate the Global Agrivoltaics Market (by Array Configuration)

The fixed array stands out as the leading segment among the various types of array configurations in the global agrivoltaics market, driven by its practicality, cost-effectiveness, and compatibility with agricultural operations. This segment represents a significant portion of agrivoltaics installations worldwide, offering a balance between solar energy generation and agricultural productivity.

One key advantage of fixed arrays is their simplicity and ease of installation, making them a preferred choice for many farmers and solar developers. Unlike tracking

systems, fixed arrays do not require complex mechanisms for adjusting the angle of solar panels, reducing maintenance costs and potential points of failure. Furthermore, fixed arrays are well-suited for a variety of agricultural settings, including grassland farming, horticulture, and arable farming, providing flexibility in deployment. Their stationary nature ensures minimal disruption to farming activities, allowing crops to thrive without compromising solar energy generation.

## Segmentation 2: by Photovoltaic Technology

Monofacial Solar Panels

Bifacial Solar Panels

Translucent Photovoltaic Technology

Others

## Monofacial Solar Panels Segment to Dominate the Global Agrivoltaics Market (by Photovoltaic Technology)

Monofacial solar panels have emerged as the leadingly adopted photovoltaic technology in the global agrivoltaics market. This trend is driven by several factors, including cost-effectiveness, efficiency, and compatibility with agricultural activities. Monofacial panels are traditional solar panels that absorb sunlight from one side, making them ideal for installations where space is not a constraint.

One recent example highlighting the dominance of monofacial solar panels in agrivoltaics installations is the AgriPV project in the Netherlands, initiated in April 2021. This project involves the installation of monofacial solar panels on a greenhouse to generate solar power while allowing for crop cultivation underneath. The project showcases the efficiency and compatibility of monofacial panels with agricultural settings, as well as their ability to enhance land use efficiency.

## Segmentation 3: by Site of Installation

Grassland Farming

Horticulture and Arable Farming

Indoor Farming

Pollinator Habitat

Pollinator Habitat Segment to Dominate the Global Agrivoltaics Market (by Site of Installation)

Pollinator habitat emerges as the leading application segment in the global agrivoltaics market, showcasing a pivotal shift toward sustainable agricultural practices and renewable energy generation. This segment not only promotes biodiversity but also enhances the ecosystem services provided by agrivoltaics systems.

A notable example is Jack's Solar Garden, launched in June 2021, which stands as the largest agrivoltaics research project in the U.S. Located in Boulder County, Colorado, this 1.2-MW solar farm integrates all four types of vegetation, including pollinator habitats. The site features over 3,000 trees, shrubs, and other pollinator-friendly plants, demonstrating a successful blend of solar energy production and environmental conservation.

Segmentation 4: by Region

North America: U.S. and Canada

Europe: France, Germany, Italy, Spain, U.K., and Rest-of-Europe

Asia-Pacific: China, Japan, India, South Korea, and Rest-of-Asia-Pacific

Rest-of-the-World: Brazil, South Africa, and Other

North America, especially the U.S., plays a pivotal role in shaping the global agrivoltaics market, being a major contributor due to its increasing energy demands and the rising prominence of agrivoltaics as a sustainable energy source. The growth of the agrivoltaics market in the U.S. is expected to accelerate in the coming years, driven by factors such as government support, rising demand for renewable energy, and the benefits it offers to farmers.

A significant milestone in the U.S. agrivoltaics landscape was the launch of the U.S. Department of Energy's Agrivoltaics Partnership in 2020, aiming to accelerate the development and deployment of agrivoltaics technologies. In December 2022, the U.S. Department of Energy announced the Foundational Agrivoltaics Research for Megawatt Scale (FARMS) funding, allocating \$8 million for six solar energy research projects across six states and the District of Columbia. This funding initiative demonstrates the government's commitment to supporting the growth and development of the agrivoltaics market.

### Recent Developments in the Global Agrivoltaics Market

In October 2023, the National Solar Energy Federation of India (NSEFI) inaugurated the Agrivoltaics Alliance in Delhi, India. The primary aim of this initiative is to facilitate easier crop production. By achieving incremental improvements, lowering production expenses, and maximizing the utilization of natural sunlight, the country aims to mitigate the presence of adulterated vegetables in the market.

In December 2022, the U.S. Department of Energy announced the Foundational Agrivoltaics Research for Megawatt Scale (FARMS) funding, allocating \$8 million for six solar energy research projects across six states and the District of Columbia.

In December 2023, Turkey initiated the Agrivoltaics research project, enabling researchers to evaluate both products and the production process. To facilitate this endeavor, researchers introduced tracker systems tailored for crops cultivated through Agrivoltaics methods.

### Demand - Driver, Challenge, and Opportunity

#### Market Driver: Dual-Revenue Streams for Farmers

Agrivoltaics systems offer farmers the opportunity to utilize the land beneath the solar panels for either livestock grazing or cultivating various crops while simultaneously generating electricity. This arrangement creates a dual-revenue stream for farmers. Agrivoltaics have been successfully implemented for berries, grapes, and orchard crops such as apples, and they are particularly suitable for shade-tolerant crops such as cauliflower or cabbage. Researchers from the

University of Arizona found that growing crops in the shade from solar panels can yield two or three times more fruit and vegetables compared to conventional agricultural setups.

### Market Challenge: High Installation Costs

High installation costs have presented a significant obstacle to the widespread adoption of agrivoltaics. A primary contributing factor to these costs is the expense of photovoltaic panels. Moreover, the installation of agrivoltaic systems can be intricate, necessitating specialized expertise and equipment, further escalating expenses. The total cost of installing agrivoltaic systems can vary based on factors such as system size, complexity, location, and specific components used.

According to a report by the National Renewable Energy Laboratory (NREL) in the U.S., the installed cost of an agrivoltaic system typically ranges from \$2.60 to \$4.50 per watt. In comparison, traditional ground-mounted solar systems typically cost between \$1.50 to \$3.00 per watt. This significant disparity in costs is likely to impede the growth of the Agrivoltaics market during the forecast period.

### Market Opportunity: Reduce Emission through Improved Farm Electrification

Agrovoltaics presents opportunities for carbon sequestration by incorporating vegetation between and around solar panels. This vegetation serves as a carbon sinks, absorbing carbon dioxide from the atmosphere and storing it in the plant biomass and soil. Through this integration of solar panels with vegetation, agrovoltaics can effectively mitigate greenhouse gas emissions and contribute to reducing the farm's overall carbon footprint.

How can this report add value to an organization?

**Product/Innovation Strategy:** The product segment helps the reader understand the different applications of agrivoltaics products in the market. The market is poised for significant expansion with ongoing technological advancements, increased investments, and growing awareness of the use of agrivoltaics. Therefore, agrivoltaics are a high-

investment and high-revenue generating model.

**Growth/Marketing Strategy:** The global agrivoltaics market is growing at a rapid pace. The market offers enormous opportunities for existing and emerging market players. Some of the strategies covered in this segment are mergers and acquisitions, product launches, partnerships and collaborations, business expansions, and investments. The strategies preferred by companies to maintain and strengthen their market position primarily include partnerships and collaborations.

**Competitive Strategy:** The key players in the global agrivoltaics market analyzed and profiled in the study include agrivoltaics projects. Additionally, a comprehensive competitive landscape such as partnerships, agreements, and collaborations are expected to aid the reader in understanding the untapped revenue pockets in the market.

## Research Methodology

### Factors for Data Prediction and Modeling

The base currency considered for the market analysis is US\$. Currencies other than the US\$ have been converted to the US\$ for all statistical calculations, considering the average conversion rate for that particular year.

The currency conversion rate has been taken from the historical exchange rate of the Oanda website.

Nearly all the recent developments from January 2020 to March 2024 have been considered in this research study.

The information rendered in the report is a result of in-depth primary interviews, surveys, and secondary analysis.

Where relevant information was not available, proxy indicators and extrapolation were employed.

Any economic downturn in the future has not been taken into consideration for the market estimation and forecast.

Technologies currently used are expected to persist through the forecast with no



major technological breakthroughs.

## Market Estimation and Forecast

This research study involves the usage of extensive secondary sources, such as certified publications, articles from recognized authors, white papers, annual reports of companies, directories, and major databases to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the global agrivoltaics market.

The process of market engineering involves the calculation of the market statistics, market size estimation, market forecast, market crackdown, and data triangulation (the methodology for such quantitative data processes is explained in further sections). The primary research study has been undertaken to gather information and validate the market numbers for segmentation types and industry trends of the key players in the market.

## Primary Research

The primary sources involve industry experts from the global agrivoltaics market and various stakeholders in the ecosystem. Respondents such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

The key data points taken from primary sources include:

- validation and triangulation of all the numbers and graphs

- validation of reports segmentation and key qualitative findings

- understanding the competitive landscape

- validation of the numbers of various markets for market type

- percentage split of individual markets for geographical analysis

## Secondary Research



This research study involves the usage of extensive secondary research, directories, company websites, and annual reports. It also makes use of databases, such as Hoovers, Bloomberg, Businessweek, and Factiva, to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the global market. In addition to the aforementioned data sources, the study has been undertaken with the help of other data sources and websites, such as GFI and the Delft University of Technology.

Secondary research was done in order to obtain crucial information about the industry's value chain, revenue models, the market's monetary chain, the total pool of key players, and the current and potential use cases and applications.

The key data points taken from secondary research include:

- segmentations and percentage shares

- data for market value

- key industry trends of the top players of the market

- qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

- quantitative data for mathematical and statistical calculations

## Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on inputs gathered from primary experts and analyzing company coverage, product portfolio, and market penetration.

## Leading Companies in the Agrivoltaics Market

- Jinko Solar

- Invenergy

First Solar

Nexttracker Inc.

Iqony Solar Energy Solutions

BayWa AG

Sun'Agri

Lightsource

Yingli Solar

Enel Green Power S.p.A.

Trinsolar

Next2Sun AG

SB Energy Corp

Boralex Inc.

Berkshire Hathaway Energy

Companies that are not a part of the aforementioned pool have been well represented across different sections of the report (wherever applicable).

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