

Global PV Ribbon Machine Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on PV Ribbon Machine competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. In 2024, the global production of photovoltaic (PV) ribbon welding machines reached 952 units, with an average selling price of US\$700,000 per unit. PV ribbon welding machines are one of the core pieces of equipment in the PV panel production process, primarily responsible for the precise welding of busbars (PV ribbons) onto PV cells. These ribbons act as conductive channels, collecting and transmitting the current generated by the cells, connecting multiple cells in series to form a complete circuit system, ultimately constituting a PV module with specific voltage and current output. In the PV module production process, ribbon welding machines are typically located at a critical stage between cell manufacturing and module encapsulation, connecting pre-assembled cell strings to lamination and encapsulation equipment. The welding quality directly affects the output efficiency and lifespan of the PV module. The global photovoltaic (PV) ribbon welding machine market continued to grow in 2024 along with the expansion of the PV industry. Based on ribbon welding demand estimates and equipment compatibility analysis, in terms of capacity, the annual design capacity of a single PV ribbon welding machine line is generally 60-120 units (calculated based on a complete line). Medium and large enterprises, such as Autowell, can achieve an annual capacity of over 150 units through modular production lines. The industry average capacity utilization rate is approximately 75%, which can increase to over 85% during the peak period of PV module production expansion. Gross profit margins vary significantly depending on the technology level; the gross profit margin for conventional equipment is generally between 25% and 35%, while the gross profit margin for high-end equipment with independent precision control technology and energy-saving systems can reach

40%. Transaction Case: In the third quarter of 2024, Jiangsu Youzha Machinery delivered an integrated photovoltaic welding strip production line to Yubang New Materials. The line included an energy-saving rolling mill, a high-speed tinning machine, and intelligent rewinding equipment, with a contract value of 4.8 million yuan. The core technical indicators were "roll surface roughness $Ra \leq 0.02 \mu\text{m}$, raw material utilization rate $\geq 95\%$, and annual power consumption reduced by 25% compared to traditional equipment," used to produce ultra-thin welding strips compatible with OBB busbar-less modules.

Industry Chain: The upstream of the photovoltaic welding strip machine industry chain includes precision mechanical components, control systems, and material supply: core components such as precision rolls and servo motors are supplied by companies such as Panasonic and NSK; laser generators mainly come from Trumpf (Germany) and Han's Laser (China); control system components rely on brands such as Omron and Schneider Electric; and stainless steel and special coating materials are mainly supplied by Baosteel and Taiyuan Iron & Steel. Downstream applications are primarily with photovoltaic (PV) ribbon manufacturers (such as Yubang New Materials and Tongxiang Technology) and PV module manufacturers (such as LONGi, Jinko Solar, and Trina Solar), with particularly strong demand in mass production lines for OBB (Obstacle-free) modules, HJT (heterojunction) modules, and BC (carbon-coupled) cell modules. With the continued growth of global PV installations, global demand for PV ribbon reached 273,000 tons in 2024, directly driving up the demand for ribbon welding machines.

Business Opportunities Brought by PV Ribbon Welding Machines The large-scale production of high-efficiency cell technologies such as N-type TOPCon and HJT is driving the development of ribbons towards ultra-fine wire diameters (SMBB, 0.24-0.26mm or even 0.2mm), low-temperature processing, and irregular shapes. The production technology barriers for these special ribbons are high, and the processing fees are significantly higher than for traditional products. For example, SMBB (Super-Slim Busbar) solder ribbon can effectively reduce costs for downstream module manufacturers by reducing silver paste consumption and shading area in solar cells. Therefore, its unit processing profit margin may have a 20%-40% premium compared to conventional solder ribbon. Furthermore, without breakthroughs in OBB (Optimal Busbar) technology, the trend towards thinner solder ribbons will be further accelerated, opening up new growth opportunities.

Industry Development Trends and Challenges The industry development trend presents three main directions: precision, energy saving, and intelligence. Technological upgrades focus on three dimensions: First, improved precision, with roll surface roughness breaking through to $Ra \leq 0.02 \mu\text{m}$ and welding tolerance controlled within $\leq 0.003\text{mm}$ to adapt to ultra-thin solder ribbon production; second, energy saving optimization, reducing power consumption per unit capacity by more than 25% through high-efficiency motors and waste heat recovery systems, with some equipment saving up to 120,000 kWh/unit per year; and third, intelligent

upgrades, incorporating IoT modules to achieve remote monitoring of welding parameters and combining with MES systems to achieve full traceability of production data, adapting to the digital management needs of photovoltaic factories. Market opportunities mainly come from three areas: First, the expansion of new battery production capacity, with the expansion of HJT, BC and other technology routes driving demand for high-end ribbon welding machines, and equipment investment per GW production line increasing by 40% compared to the PERC route; Second, the upgrading of existing equipment, with traditional equipment facing a replacement wave due to high energy consumption and insufficient precision, and the replacement demand is expected to account for 35% from 2024 to 2026; Third, the expansion of overseas markets, with the construction of photovoltaic module factories in Southeast Asia and South America providing incremental exports for domestically produced equipment. However, the industry still faces multiple challenges: significant pressure for technological iteration, with new processes such as OBB and copper plating requiring rapid equipment adaptation and R&D cycles needing to be compressed to 6-12 months; prominent monopoly issues in the high-end market, with European and American brands still leading domestic companies in core laser welding technologies and long-term stability, and imported equipment, despite being more than 50% more expensive than domestically produced equipment, occupying the high-end production lines of leading component manufacturers; intensified homogeneous competition, with small and medium-sized manufacturers crowding into the low-end and mid-range markets, leading to frequent price wars for conventional equipment and squeezing gross profit margins to below 20%; in addition, core components such as high-precision rolls and laser generators still rely on imports, making them highly susceptible to fluctuations in the international supply chain.

The global PV Ribbon Machine market size was estimated at USD 667.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 4.90% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global PV Ribbon Machine market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current

status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global PV Ribbon Machine market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the PV Ribbon Machine market.

Global PV Ribbon Machine Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

Ooitech
Jiangsu Youzha Machinery
Wuxi Tongli Electric
Zichen Laser
KUKA
JUKI
Byström (Switzerland)
FUHR
Shanghai Youzha Technology
Zhangjiagang Shengyou Machinery
Plasmait

Jiangsu Lanhui Intelligent Equipment Technology
Suzhou Weilan Intelligent Equipment
Sky Blue Environmental Protection Technology
WEN CHENG LEAD WIRE
Invimec

Market Segmentation (by Type)

Laser Welding
Electromagnetic Induction Welding
Roller Pressure Welding

Market Segmentation (by Application)

Photovoltaic Module Manufacturing
Distributed Photovoltaic Power Generation Systems
Centralized Photovoltaic Power Stations
Energy Storage System Integration
Others

Geographic Segmentation

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study
Neutral perspective on the market performance

Recent industry trends and developments
Competitive landscape & strategies of key players
Potential & niche segments and regions exhibiting promising growth covered
Historical, current, and projected market size, in terms of value
In-depth analysis of the PV Ribbon Machine Market
Overview of the regional outlook of the PV Ribbon Machine Market:

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the PV Ribbon Machine Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application,

covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of PV Ribbon Machine, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

Customization of the Report

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