

Global Photovoltaic EL Tester Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Photovoltaic EL Tester market size is expected to reach \$ 466 million by 2032, rising at a market growth of 10.2% CAGR during the forecast period (2026-2032).

In 2025, global Photovoltaic EL Tester production reached approximately 12.23 K Units, with an average global market price of around 18425 USD per Unit.

A Photovoltaic EL Tester is a specialized photovoltaic inspection device that uses electroluminescence imaging to detect internal defects in solar cells, PV modules, or installed PV arrays. In a typical testing process, a forward current is applied to the solar cell, module, or string, causing silicon-based cells to emit near-infrared electroluminescence signals. These signals are captured by high-sensitivity CCD, CMOS, InGaAs, or SWIR cameras and then analyzed through image processing or AI-based defect recognition software to identify hidden defects such as microcracks, broken cells, interrupted fingers, poor soldering, dark cells, low-efficiency cells, shunts, PID, and localized failures that are difficult to detect visually.

The upstream core raw materials and components of Photovoltaic EL Tester mainly include high-sensitivity cameras, image sensors and detectors, optical lenses and filters, industrial PCs and GPUs, and motion control and automation systems. Typical raw material suppliers include Hamamatsu Photonics, Teledyne, Sony Semiconductor Solutions, Edmund Optics, Thorlabs, SCHOTT, Advantech, ADLINK, Vecow, Intel, NVIDIA, Siemens, Mitsubishi Electric, Omron, Yaskawa, etc. The downstream applications are mainly with photovoltaic cell and photovoltaic module manufacturers, and typical users include LONGi, JinkoSolar, Trina Solar, JA Solar, Canadian Solar, Risen Energy, Astronergy, Tongwei, Talesun, First Solar, Hanwha Qcells, REC Solar, etc.

The single-line capacity of Photovoltaic EL Tester varies greatly depending on the product type, manufacturing process, and degree of automation of the production line. The industry gross profit margin is usually in the range of 25%-40%.

Photovoltaic EL Testers are critical inspection devices used in PV manufacturing and solar plant operation to identify internal defects in solar cells and modules. Their core advantage lies in electroluminescence imaging, which converts hidden defects such as microcracks, broken cells, interrupted fingers, poor soldering, dark cells, low-efficiency cells, shunts, PID, and localized failures into visible images, while image processing or AI algorithms further support defect recognition and quality traceability. Compared with conventional visual inspection, thermal imaging, or standalone electrical performance testing, EL inspection can detect structural risks inside PV modules at an earlier stage, helping manufacturers reduce quality disputes, and helping plant owners avoid post-installation power losses and inaccurate O&M judgments. It addresses key industry pain points related to thinner and larger high-efficiency modules, transportation and installation damage, quality consistency, and the identification of hidden defects in operating PV assets. As PV module technologies continue to evolve, EL testers are no longer merely quality-control instruments, but are becoming important tools for ensuring module reliability, manufacturing yield, and solar asset quality.

From an industry perspective, the global photovoltaic EL tester market is developing along two major tracks: inline inspection for PV manufacturing and field inspection for solar plant operation. China, as the world's largest PV module manufacturing base, has the most concentrated demand for inline EL systems, IV+EL integrated testers, EL+VI inspection systems, and automated production-line inspection equipment. Chinese suppliers are becoming increasingly competitive through cost efficiency, fast delivery, production-line adaptability, and local service capability. Europe has stronger accumulation in high-end imaging, laboratory testing, third-party quality assessment, and specialized inspection systems, with companies in Germany, Italy, and Spain representing important players in mobile EL, inline EL, and high-precision inspection equipment. Japan places greater emphasis on reliability and field inspection, with some suppliers showing technical strength in daylight EL/PL and installed-module inspection. North America is mainly driven by laboratory R&D, module certification, solar asset evaluation, and O&M inspection needs. In terms of competition, overseas specialist manufacturers still hold advantages in high-end imaging, algorithm experience, and system stability, while Chinese suppliers are catching up rapidly by leveraging a complete PV manufacturing ecosystem, fast product iteration, and broad application scenarios. The competitive focus is shifting from simply capturing EL images to

inspection speed, automatic defect-recognition accuracy, production-line integration, field adaptability, and data management capability.

Looking ahead, the growth potential of photovoltaic EL testers will be mainly supported by ongoing PV module capacity upgrades, rapid evolution of high-efficiency cell technologies, rising microcrack risks from thinner and larger modules, and increasing demand for defect visualization, asset assessment, and warranty traceability as operating solar plants enter a more refined O&M stage. With the wider adoption of TOPCon, HJT, BC, and other high-efficiency module technologies, manufacturers will require more advanced inline defect recognition, AI-based image interpretation, and full-process quality traceability. At the same time, portable EL testers, string-level EL systems, UAV-based EL/PL inspection, and daylight inspection technologies are expected to open broader application opportunities in plant acceptance, O&M inspection, insurance claims, and asset transactions. Over the long term, EL testing equipment with high-sensitivity imaging, stable current excitation, automation integration, AI defect recognition, and inspection data management capabilities will capture greater value within the PV value chain and become an important equipment category for improving module reliability, plant generation efficiency, and long-term solar asset returns.

This report studies the global Photovoltaic EL Tester production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Photovoltaic EL Tester and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Photovoltaic EL Tester that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Photovoltaic EL Tester total production and demand, 2021-2032, (Units)

Global Photovoltaic EL Tester total production value, 2021-2032, (USD Million)

Global Photovoltaic EL Tester production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Photovoltaic EL Tester consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Photovoltaic EL Tester domestic production, consumption, key domestic manufacturers and share

Global Photovoltaic EL Tester production by manufacturer, production, price, value and

market share 2021-2026, (USD Million) & (Units)

Global Photovoltaic EL Tester production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Photovoltaic EL Tester production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Photovoltaic EL Tester market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include MBJ Solutions GmbH, Ecoprogetti S.r.l., Mondragon Assembly S.Coop., NPC Incorporated, Greateyes GmbH, BT Imaging Pty Ltd, BrightSpot Automation, SC-SOLAR, Horad, Shanghai Hi-Show Photovoltaic Science And Technology, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Photovoltaic EL Tester market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Photovoltaic EL Tester Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Photovoltaic EL Tester Market, Segmentation by Type:

Inline Type

Offline Type

Global Photovoltaic EL Tester Market, Segmentation by Automation Level:

Manual Type

Semi-automatic Type

Fully Automatic Type

Global Photovoltaic EL Tester Market, Segmentation by Technology:

Nighttime Field EL Testing

Daylight EL Testing

Global Photovoltaic EL Tester Market, Segmentation by Application:

Photovoltaic Cell Production

Photovoltaic Module Production

Others

Companies Profiled:

MBJ Solutions GmbH

Ecoprogetti S.r.l.

Mondragon Assembly S.Coop.

NPC Incorporated

Greateyes GmbH

BT Imaging Pty Ltd

BrightSpot Automation

SC-SOLAR

Horad

Shanghai Hi-Show Photovoltaic Science And Technology

Suzhou LaiLx New Energy Technology

Millennial Solar

CHNSpec

Nanjing Vision Potential Intelligent Technology

Suzhou Zhisheng Technology

ChinTiyan New Energy (Hubei)

Key Questions Answered:

1. How big is the global Photovoltaic EL Tester market?
2. What is the demand of the global Photovoltaic EL Tester market?
3. What is the year over year growth of the global Photovoltaic EL Tester market?

4. What is the production and production value of the global Photovoltaic EL Tester market?
5. Who are the key producers in the global Photovoltaic EL Tester market?
6. What are the growth factors driving the market demand?

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