

Global PV Operation & Maintenance Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G3A376CC2569EN.html>

Date: June 2026

Pages: 213

Price: US\$ 4,480.00 (Single User License)

ID: G3A376CC2569EN

Abstracts

The global PV Operation & Maintenance market size is expected to reach \$ 9883 million by 2032, rising at a market growth of 6.7% CAGR during the forecast period (2026-2032).

PV O&M is the downstream, post-COD aftermarket service layer of the solar value chain. Its upstream inputs include monitoring and analytics software, inverters/combiner boxes/spare parts, inspection and cleaning equipment, field technicians, and subcontracted services such as HV works, vegetation management, and cleaning. Core tasks include monitoring, operations administration, preventive/corrective/condition-based maintenance, safety and compliance, performance diagnostics, warranty and spare-parts management, reporting and dispatch coordination, and in some cases extensions into asset management, power trading, retrofit optimization, and repowering interfaces. The boundary normally excludes module/inverter manufacturing, core EPC construction, project development, and financing unless bundled into an integrated offering. Downstream customers are mainly asset owners, including utilities/IPPs, infrastructure funds, commercial & industrial rooftop owners, and residential platforms. According to our investigation, gross margin for residential after-sales O&M can be seen at roughly 37.8%-61.1%, while a digital energy services segment that includes O&M/power generation shows a gross margin of about 57.8%, indicating a recurring service model with medium-to-high margin characteristics.

Market opportunities and key drivers:

The photovoltaic operation and maintenance market is experiencing explosive growth. The core opportunities stem from the continuous expansion of photovoltaic installation capacity under the global energy transition and strong policy promotion. As of 2024,

China's cumulative photovoltaic installed capacity has exceeded 886.66 GW (concentrated power accounts for 57.6%, distributed power accounts for 42.4%), and it is expected to exceed 1200 GW by 2030. The huge installed capacity of power stations has created a strong demand for operation and maintenance. From the policy perspective, China mandates that new photovoltaic power stations be equipped with intelligent operation and maintenance systems, and existing power stations must complete digital transformation within a deadline, and distributed photovoltaic projects can only be connected to the grid with 'professional operation and maintenance services' as a prerequisite. This directly drives the annual procurement demand. At the same time, technological innovation drives an efficiency revolution: unmanned aerial vehicle inspection will increase efficiency by 10 times, AI fault prediction reaches 85%, and the penetration rate of intelligent operation and maintenance will reach 30% in 2025, significantly reducing labor costs and optimizing power generation efficiency. Additionally, the power market reform prompts the operation and maintenance services to upgrade from basic maintenance to value-added areas, such as peak electricity price scheduling, carbon asset management, and green certificate trading, further expanding the profit space.

Challenges and future directions:

The core challenges faced by the photovoltaic operation and maintenance industry lie in talent shortage, high cost pressure, and technological iteration risks. The cost of operation and maintenance is over 60% human labor, and the shortage of professional talents leads to varying service quality, especially for distributed projects due to the scattered sites (loss rate 8%-15%), which increases the difficulty of regional operation and maintenance. Rapid technological updates force enterprises to continuously invest in research and development, and small and medium-sized enterprises face the double pressure of high costs for intelligent upgrades and overseas trade barriers. The future direction will focus on technology integration and service ecosystem reconstruction: through 5G + edge computing to achieve millisecond-level fault response, combined with digital twin technology to simulate and optimize operation and maintenance strategies, and extend to multi-energy collaborative management of 'photovoltaic + energy storage + charging piles'; the business model will shift to 'data-driven', relying on big data analysis to provide services such as power generation insurance, power trading strategies, etc., to build differentiated competitiveness. Under the accelerated industry consolidation, enterprises with full-chain ecosystem integration capabilities will dominate the market, and standardization construction and cross-border talent cultivation become the key to breakthrough.

This report studies the global PV Operation & Maintenance demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for PV Operation & Maintenance, 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 PV Operation & Maintenance that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global PV Operation & Maintenance total market, 2021-2032, (USD Million)

Global PV Operation & Maintenance total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: PV Operation & Maintenance total market, key domestic companies, and share, (USD Million)

Global PV Operation & Maintenance revenue by player, revenue and market share 2021-2026, (USD Million)

Global PV Operation & Maintenance total market by Type, CAGR, 2021-2032, (USD Million)

Global PV Operation & Maintenance total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global PV Operation & Maintenance market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include NovaSource Power Services, Stern Energy, Alectris, Isotrol, SMA, Anesco, SUNGROW, Strata Clean Energy, Solar Piezo Clean, Big Shine Energy, 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 PV Operation & Maintenance market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, 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 PV Operation & Maintenance Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global PV Operation & Maintenance Market, Segmentation by Type:

On-site O&M

Remote O&M

AI-Driven O&M

Global PV Operation & Maintenance Market, Segmentation by Service Depth:

Lightweight Layer

Standard Technology

Other

Global PV Operation & Maintenance Market, Segmentation by Customer Application:

Government

Industrial and Commercial

Individuals

Other

Global PV Operation & Maintenance Market, Segmentation by Application:

Industrial PV Power Plant

Commercial PV Power Plant

Companies Profiled:

NovaSource Power Services

Stern Energy

Alectris

Isotrol

SMA

Anesco

SUNGROW

Strata Clean Energy

Solar Piezo Clean

Big Shine Energy

GOLDBECK SOLAR

Meteocontrol

Ensibo

SolarEdge Technologies

SOLV Energy

Sterling and Wilson Renewable Energy

ACWA Power

Photon Energy

Snegrid Technology

Canadian Solar

LONGi

Trina Solar

Jinko Power

Jiangsu Zhongtian Technology

State Power Rixin Technology

Jiangsu Akcome Science&Technology

JA Solar

Longshine Technology

Sihan Techanology

Yunying O&M

CYG ET

Key Questions Answered

1. How big is the global PV Operation & Maintenance market?
2. What is the demand of the global PV Operation & Maintenance market?
3. What is the year over year growth of the global PV Operation & Maintenance market?
4. What is the total value of the global PV Operation & Maintenance market?
5. Who are the Major Players in the global PV Operation & Maintenance market?
6. What are the growth factors driving the market demand?

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