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Global Solar Thermal (CSP) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Solar Thermal (CSP) market size is expected to reach $ 11689 million by 2032, rising at a market growth of 21.2% CAGR during the forecast period (2026-2032).
Solar Thermal (Concentrated Solar Power, ?CSP?) in this report is defined as a capital-intensive system solution rather than a commodity fuel or a stream of electricity sales. CSP plants use mirrors to concentrate sunlight onto a receiver, convert it into high-temperature heat, and then deliver this heat to a conventional power block or industrial process. Combined with thermal energy storage (TES), CSP can decouple solar collection from final energy use and provide firm, dispatchable heat and power that complements variable renewables such as PV and wind.
From a technology perspective, the industry is organised around four main system archetypes: Power Tower, Parabolic Trough, Linear Fresnel, and Parabolic Dish. These configurations differ in optical layout, receiver concept, heat-transfer fluid and storage design, but they are all engineered and delivered as integrated ?plant packages? that include the solar field, receiver and piping, storage system, and power block and/or process-heat island. In practice, the global market is dominated by large, utility-scale tower and trough plants, often hybridised with PV, gas or other assets; Fresnel and dish solutions are more niche and typically address specific site or process-heat opportunities.
Commercially, CSP is a project-based EPC market. Projects are developed by utilities, IPPs, state-owned entities or industrial users, and then tendered as multi-year EPC, EPCM or turnkey contracts. A limited group of experienced integrators and engineering contractors (including diversified construction groups and specialised CSP players) compete to design and deliver the CSP ?island? and, in many cases, the wider balance of plant. Revenue for CSP vendors is therefore recognised primarily at contract award and during construction, not as ongoing payments for electricity or heat. Long-term cash flows from power purchase agreements (PPAs), capacity payments or industrial heat

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offtake are fundamental to project bankability, but they accrue mainly to developers and asset owners, not to EPC contractors.

1. Positioning of Solar Thermal & CPV/CPVT in a PV-dominated world

The evidence assembled in this report confirms that Solar Thermal (CSP) and Concentrated Photovoltaic / Photovoltaic-Thermal (CPV/CPVT) technologies remain niche in terms of installed capacity, but strategically important in terms of system value. By 2023, global CSP capacity was only around 8 GW ? less than 1% of total solar capacity ? compared with well above 2 TW of installed solar PV by 2024.

Against this backdrop, the project universe and market sizing work in this study highlight two core points:

1.1 Scale gap vs. PV is structural, not temporary. CSP and CPV/CPVT will not close the volume gap with commodity PV modules; instead, they compete on dispatchability, high-temperature heat and co-generation value, not on installed megawatts alone.

1.2 System-value lens is decisive. Wherever tariffs and market design remunerate firm low-carbon capacity and long-duration flexibility, Solar Thermal and hybrid CPV/CPVT solutions become relevant options despite higher specific CAPEX. Where these attributes are not priced, project pipelines stall even under strong resource conditions. In our view, this asymmetry explains why CSP/CPVT deployment remains geographically concentrated while medium- and long-term scenarios (IEA, IRENA) still assume a several-fold increase in CSP capacity by 2030 (typically 50?80 GW vs. ~8 GW today).

2. Growth will be policy-led and geographically concentrated

The project database underpinning this report shows that future Solar Thermal growth is anchored in a small set of policy-driven markets rather than broad, organic global adoption:

2.1 China already accounts for a material share of global CSP additions and is now the single most important growth market. By mid-2025, China had around 1.1 GW of operational CSP and a pipeline exceeding 8 GW across Qinghai, Gansu, Inner Mongolia and Xinjiang. A late-2025 official document sets an indicative target of around 15 GW of CSP capacity in the next planning period, explicitly positioning solar thermal as part of desert-base mega-projects and as a dispatchable resource in high-renewables systems.

2.2 MENA and selected emerging markets (e.g. Morocco, UAE, Saudi Arabia, parts of Southern Africa and Latin America) continue to develop large individual plants and hybrid complexes. Flagship projects like the 700 MW CSP + 250 MW PV Noor Energy 1 / DEWA IV complex in Dubai, with 12?15 hours of molten-salt storage, illustrate how CSP is used to deliver round-the-clock solar power into evening peaks.

2.3 Other regions ? Europe, North America, OECD Asia ? are present mainly through legacy plants, R&D activities and a small number of niche or repowering projects. In

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these markets, high wholesale price volatility, uncertain long-term support frameworks and strong competition from PV plus batteries limit new CSP/CPVT investment to very specific applications.
Our assessment is that this concentration is unlikely to change materially over the next decade. The national-level policy frameworks and auction designs reviewed in the report suggest that:
2.4 Most incremental CSP capacity through 2030 will come from China and MENA;
2.5 Other markets will contribute opportunistically, often via single landmark projects rather than continuous pipelines;
2.6 For CPVT in particular, industrial heat and co-generation rather than grid-only power will be the main driver.
3. Technology mix: from trough legacy to tower, hybrids and CPVT
The historical base in our project universe remains dominated by parabolic trough plants, reflecting the first two commercialisation waves of CSP. This is consistent with global statistics, where trough technology still accounts for the majority of the ~6?7 GW operational fleet. However, the forward-looking pipeline and scenario work in this report indicate a clear technological pivot:
3.1 Molten-salt tower as the new reference. In China?s recent batches, in Gulf mega-projects and in several industrial-heat designs, molten-salt power towers increasingly serve as the default reference case, supported by higher operating temperatures, more compact layouts and improved storage integration. This is aligned with external assessments that see the strongest cost-reduction potential in tower configurations.
3.2 Hybridisation as de-risking tool. Projects such as DEWA IV (trough + tower + PV) and emerging Chinese ?CSP+PV+wind? bases show that sponsors now routinely combine multiple technologies within a single complex to diversify construction risk and optimise the output profile. Our project-level analysis confirms that most recently announced plants include some form of hybrid component (PV and/or conventional generation), with pure-play stand-alone CSP becoming less common.
3.3 CPV/CPVT moving from concept to pilot, not yet to scale. On the CPV/CPVT side, the technical literature documents impressive laboratory and pilot-scale performance: multi-junction CPV cells have reached efficiencies close to 48%, while recent CPVT system reviews report combined electrical-thermal efficiencies in the 60?80% range and LCoE estimates competitive with other renewables in high-DNI sites. Yet the project mapping in this study finds that real-world deployment remains limited to small pilot plants, building-scale demonstrators and a handful of industrial-heat projects, with no CPVT plant currently approaching the scale of mainstream CSP utility projects.
Our conclusion is that, within the study horizon, molten-salt tower CSP with integrated storage is the workhorse utility-scale option, while CPV/CPVT is best viewed as an emerging technology family with credible technical potential but still lacking the

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bankable, multi-plant track record required for broad adoption.
4. Economics: premium CAPEX, but competitive in long-duration flexibility niches
The cost evidence assembled in the report, cross-checked against international benchmarks, points to a persistent but narrowing cost gap between Solar Thermal solutions and alternative low-carbon options:
4.1 Recent cost surveys show that new CSP additions remain more capital-intensive than PV and onshore wind, and that annual CSP capacity additions have been relatively flat in recent years despite record growth in overall renewables.
4.2 However, headline CAPEX is a poor proxy for system value. In high-DNI sites with 8?15 hours of storage, CSP plants can deliver firm, dispatchable output that directly competes with gas-fired peakers or PV plus long-duration storage. Flagship projects in Dubai and elsewhere have already set PPA prices in the mid-single-digit US cents per kWh despite long storage durations, supported by concessional finance and scale efficiencies.
4.3 For CPVT, techno-economic studies indicate that, at favourable sites and with optimised designs, combined electricity-and-heat output can achieve LCoE estimates broadly similar to other renewables, particularly where high-temperature process heat has high marginal value; yet these numbers remain largely model-based and require validation through real assets.
Our interpretation is that economics are highly context-specific:
4.4 In systems that do not explicitly reward flexibility or high-temperature heat, CSP/CPVT will struggle to compete with PV plus batteries.
4.5 In systems where evening peaks, firm capacity needs and industrial decarbonisation are binding constraints, the premium CAPEX of CSP/CPVT is justifiable and, in some cases, economically attractive.
This asymmetry underpins our base-case forecast: limited global volumes but economically rational growth in a series of well-defined niches.
5. Competitive dynamics: from European pioneers to China-anchored industrialisation
The company-level mapping in this report shows a market structure characterised by:
5.1 A small group of globally active EPC and technology players (many with European or Middle Eastern origins) that provide reference plants, key components and know-how;
5.2 Rapidly rising participation by Chinese EPCs and manufacturers, leveraging experience from domestic demonstration batches and large desert-base projects, as well as integrated supply chains spanning mirrors, receivers, molten-salt equipment and control systems;
5.3 A long tail of local civil-works contractors, peripheral component suppliers and specialised service firms, often tied to a single project or region.
Over the forecast period, we expect competitive advantage to be determined less by

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proprietary hardware and more by:
5.4 Bankable reference portfolios ? demonstrated ability to deliver CSP/CPVT plants on time, on budget and at or above guaranteed performance;
5.5 Standardised yet flexible plant architectures ? re-use of proven ?platforms? (e.g. 100 MW tower blocks with fixed storage hours) that can be replicated across markets, while allowing local adaptation;
5.6 System-integration and lifecycle capabilities ? combining solar field, storage, power block, digital control and O&M into integrated offerings, particularly for complex hybrid projects (CSP+PV+wind+storage).
In this landscape, we see a gradual shift of manufacturing and EPC cost leadership toward China, while technology origination and complex system design remains more distributed, with long-standing European and other players still important in high-specification or first-of-a-kind projects.
6. Implications and watchpoints
Synthesising the quantitative and qualitative findings of this study, our main conclusions are:
6.1 Solar Thermal and CPV/CPVT are moving from ?experimental? to ?strategic niche? status. The current fleet is small, but selected markets are clearly internalising their system value. This justifies continued tracking and dedicated allocation of development effort within diversified renewable portfolios.
6.2 Policy clarity on flexibility remuneration is the single most important external driver. Where auctions, capacity markets or regulated tariffs recognise long-duration storage and high-temperature heat, we expect CSP/CPVT pipelines to materialise; where they do not, pipelines will remain sporadic regardless of resource quality.
6.3 China and MENA will define the global learning curve. Their project pipelines, cost trajectories and industrial strategies will set the reference points for technology risk perception and financing conditions worldwide. Monitoring Chinese policy implementation around the 15 GW CSP ambition and the performance of the newest desert-base hybrids is therefore critical for any global outlook.
6.4 For investors, selectivity and structuring matter more than volume. The opportunity set is not about building large portfolios of ?plain vanilla? plants, but about a limited number of well-structured, policy-anchored projects with robust offtake, strong sponsors and proven EPC partners.
6.5 For technology developers, CPVT is a high-potential but long-cycle option. The combined-efficiency and high-temperature advantages documented in recent literature are compelling, but commercial relevance depends on successfully bridging the bankability gap ? via pilots in industrial clusters, district heating and high-value process-heat applications rather than immediate pursuit of large stand-alone power plants.
Overall, we view Solar Thermal and CPV/CPVT not as broad substitutes for PV and

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wind, but as complementary, high-value tools in a decarbonisation toolbox that must increasingly deliver flexibility, firm capacity and high-temperature heat alongside low-cost energy. The project universe, cost benchmarks and forward-looking scenarios in this report support a measured but positive outlook for these technologies within the clearly defined boundaries described above.

This report studies the global Solar Thermal (CSP) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Solar Thermal (CSP) 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 Solar Thermal (CSP) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Solar Thermal (CSP) total production and demand, 2021-2032, (KW)

Global Solar Thermal (CSP) total production value, 2021-2032, (USD Million)

Global Solar Thermal (CSP) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (KW), (based on production site)

Global Solar Thermal (CSP) consumption by region & country, CAGR, 2021-2032 & (KW)

U.S. VS China: Solar Thermal (CSP) domestic production, consumption, key domestic manufacturers and share

Global Solar Thermal (CSP) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (KW)

Global Solar Thermal (CSP) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (KW)

Global Solar Thermal (CSP) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (KW)

This report profiles key players in the global Solar Thermal (CSP) 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 Abengoa, Bosch Thermotechnology, ACCIONA, GREENoneTEC, Viessmann, 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 Solar Thermal (CSP) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (KW) and average price (USD/KW) by

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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 Solar Thermal (CSP) Market, By Region:

- United States
- China
- Europe
- Japan
- South Korea
- ASEAN
- India
- Rest of World

Global Solar Thermal (CSP) Market, Segmentation by Type:

- Power Tower
- Parabolic Trough
- Linear Fresnel
- Dish

Global Solar Thermal (CSP) Market, Segmentation by Generation Capacity:

- Less than 10MW
- 10-100MW

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More than 100MW

Global Solar Thermal (CSP) Market, Segmentation by Usage Scenarios:

Grid-Connected Dispatchable Power

Capacity and Ancillary Services

Others

Global Solar Thermal (CSP) Market, Segmentation by Application:

Heat Generation

Power Generation

Companies Profiled:

Abengoa

Bosch Thermotechnology

ACCIONA

GREENoneTEC

Viessmann

Key Questions Answered:

1. How big is the global Solar Thermal (CSP) market?
2. What is the demand of the global Solar Thermal (CSP) market?
3. What is the year over year growth of the global Solar Thermal (CSP) market?
4. What is the production and production value of the global Solar Thermal (CSP) market?
5. Who are the key producers in the global Solar Thermal (CSP) market?

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6. What are the growth factors driving the market demand?

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