

Global Full-cell Solar Panel Market Growth 2026-2032

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Abstracts

The global Full-cell Solar Panel market size is predicted to grow from US\$ 7137 million in 2025 to US\$ 12028 million in 2032; it is expected to grow at a CAGR of 7.8% from 2026 to 2032.

Full-cell solar panels are photovoltaic modules built from standard, uncut silicon wafers (typically 156mm²156mm or larger) with complete square or pseudo-square cells. Unlike half-cell modules resulting from laser-scribed cell division, full-cell modules retain original cell dimensions and electrical characteristics, providing simpler busbar design and lower manufacturing complexity. Full-cell panels typically feature 60 cells (for 20-24% efficiency, ~270-330W) or 72 cells (for ~320-400W) configurations. Key characteristics include lower internal resistance, easier manufacturing, higher tolerance to micro-cracks, and more uniform current distribution compared to half-cut designs. Main full-cell module types include monocrystalline PERC, polycrystalline (discontinued but still in secondary markets), and emerging full-cell TOPCon modules. From a value chain perspective, upstream includes silicon feedstock suppliers, ingot/wafer manufacturers, cell makers that keep full-square format; midstream involves tabber-stringer assembly, lamination, framing, junction box attachment, and flash testing; downstream demand spans utility-scale solar plants, commercial rooftops, residential installations (in cost-sensitive regions), and off-grid systems. In 2025, the average selling price is approximately US\$120 per kW, global sales volume is about 60,800 MW, and gross margins generally range from 15% to 25%, driven by raw material costs (polysilicon, silver paste, glass, EVA), manufacturing yields, and competitive pricing pressure.

The full-cell solar panel market is transitioning through a mature phase of technology substitution, where half-cut cell, shingled, and multi-busbar technologies have captured the majority of new utility-scale and rooftop installations. However, full-cell modules remain relevant for applications prioritizing low manufacturing complexity, lower repair

cost, and immediate availability at very low price points.

Technology Migration to Half-Cell and Beyond

The broader PV module industry has experienced a rapid shift away from standard full-cell modules. By increasing the number of cell cuts, manufacturers reduce series resistance and improve module power output by 5-10W. Yet this comes at the cost of additional processing steps (laser cutting) and increased risk of cell micro-cracks around cut edges. Consequently, full-cell designs maintain a foothold in regions where simple, robust, long-proven technology is valued over marginal efficiency gains.

Manufacturing Simplicity and Lower Investment Barriers

Full-cell module production requires less capital-intensive equipment compared to advanced half-cell or shingled lines. Smaller manufacturers, particularly in emerging markets with limited access to state-of-the-art tooling, continue to rely on full-cell assembly because they can use standard tabber-stringers and laminators. This lower entry barrier sustains full-cell production capacity in some regions even as global average selling prices compress.

LP Information, Inc. (LPI) ' newest research report, the "Full-cell Solar Panel Industry Forecast" looks at past sales and reviews total world Full-cell Solar Panel sales in 2025, providing a comprehensive analysis by region and market sector of projected Full-cell Solar Panel sales for 2026 through 2032. With Full-cell Solar Panel sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Full-cell Solar Panel industry.

This Insight Report provides a comprehensive analysis of the global Full-cell Solar Panel landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Full-cell Solar Panel portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Full-cell Solar Panel market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Full-cell Solar Panel and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up

qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Full-cell Solar Panel.

This report presents a comprehensive overview, market shares, and growth opportunities of Full-cell Solar Panel market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Monocrystalline Full-Cell (PERC/TOPCon/HJT)

Polycrystalline Full-Cell

N-Type Full-Cell

Segmentation by Cell Count:

60-cell (6?10)

66-cell (6?11)

72-cell (6?12)

Segmentation by Cell Interconnection / Busbar:

5 Busbars (5BB)

9 Busbars (9BB)

Multi-Busbar (MBB, >12)

Segmentation by Application:

Commercial

Industrial

Residential

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

JinkoSolar Holding Co., Ltd.

Trina Solar Co., Ltd.

JA Solar Technology Co., Ltd.

Canadian Solar Inc.

Longi Green Energy Technology Co., Ltd.

Risen Energy Co., Ltd.

Chint Solar (Astronergy)

First Solar, Inc.

Hanwha Q CELLS

Sharp Energy Solutions Corporation

Panasonic Corporation

Kyocera Corporation

Tata Power Solar Systems Ltd.

Vikram Solar Ltd.

Adani Solar

Waaree Energies Ltd.

Seraphim Energy Group Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Full-cell Solar Panel market?

What factors are driving Full-cell Solar Panel market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Full-cell Solar Panel market opportunities vary by end market size?

How does Full-cell Solar Panel break out by Type, by Application?

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