

Global Photovoltaic EL Tester Market Growth 2026-2032

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Abstracts

The global Photovoltaic EL Tester market size is predicted to grow from US\$ 220 million in 2025 to US\$ 458 million in 2032; it is expected to grow at a CAGR of 10.8% from 2026 to 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.

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

This Insight Report provides a comprehensive analysis of the global Photovoltaic EL Tester 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 Photovoltaic EL Tester portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Photovoltaic EL Tester market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Photovoltaic EL Tester 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 Photovoltaic EL Tester.

This report presents a comprehensive overview, market shares, and growth opportunities of Photovoltaic EL Tester market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Inline Type

Offline Type

Segmentation by Automation Level:

Manual Type

Semi-automatic Type

Fully Automatic Type

Segmentation by Technology:

Nighttime Field EL Testing

Daylight EL Testing

Segmentation by Application:

Photovoltaic Cell Production

Photovoltaic Module Production

Others

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.

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

ChinTiyang New Energy (Hubei)

Key Questions Addressed in this Report

What is the 10-year outlook for the global Photovoltaic EL Tester market?

What factors are driving Photovoltaic EL Tester market growth, globally and by region?

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

How do Photovoltaic EL Tester market opportunities vary by end market size?

How does Photovoltaic EL Tester break out by Type, by Application?

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