

Solar Frame Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Product Type

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Abstracts

Solar Frame Market Summary

The solar frame market represents a critical component of the global photovoltaic industry, serving as the structural backbone for solar panels that protects photovoltaic glass edges, enhances sealing performance, and improves mechanical strength. Solar frames facilitate transportation, installation, and protection of photovoltaic modules while providing essential load-bearing capacity and corrosion resistance. These components directly impact the installation efficiency and operational lifespan of solar panel systems, making them indispensable to the renewable energy ecosystem. The market is fundamentally driven by the explosive growth in global solar photovoltaic installations. According to International Energy Agency data, global PV installations have surged from 117 GW in 2019 to 375 GW in 2024, with projections indicating continued expansion to 402 GW in 2025 and 540 GW by 2028. This remarkable growth trajectory reflects the accelerating global transition toward renewable energy sources and the increasing cost competitiveness of solar technology. Solar frames represent approximately 9% of total module costs, making them the highest cost-proportion auxiliary material in photovoltaic systems. Recent industry analysis indicates that aluminum frames have become the largest component by cost, representing approximately 14% of total solar panel production costs as of late 2024, underscoring their significance in the overall value chain. The global solar frame market is estimated to be valued between 6.6 billion USD and 8.6 billion USD in 2025, reflecting the substantial scale of this specialized industry segment. The market is projected to experience robust growth with a compound annual growth rate ranging from 7.5% to 12.5% through 2030, driven by accelerating solar deployment worldwide and technological advancement in frame materials and design. This growth trajectory aligns

with broader renewable energy expansion plans, as solar photovoltaic technology is expected to account for approximately 80% of global renewable capacity growth between 2024 and 2030. The construction of large-scale solar power plants and increasing adoption of rooftop solar installations by both commercial and residential customers are primary drivers of frame demand.

Regional Market Dynamics

The global solar frame market exhibits significant regional concentration, with Asia-Pacific dominating both production and consumption. China maintains overwhelming market leadership, controlling nearly 95% of global polysilicon, ingot, and wafer production capacity. This concentration extends to frame manufacturing, where Chinese companies have established substantial production capabilities and cost advantages.

North America represents a rapidly growing market segment, with renewable energy expansion projected to more than double over 2024-2030 to almost 500 GW. This growth is propelled by favorable regulatory frameworks, corporate renewable energy procurement agreements, and federal incentives supporting distributed solar installations.

European markets continue steady expansion despite regional variations in policy support. The European Union's 600 GW solar PV ambition for 2030 remains achievable based on current growth trends, though market dynamics vary significantly across member states.

Emerging markets in Latin America, Africa, and Southeast Asia present substantial growth opportunities, driven by declining solar costs, improving grid infrastructure, and increasing energy access initiatives. However, these regions currently represent smaller market shares compared to established markets.

Product **Type Analysis** and Development Trends

Aluminum Alloy Frames

Aluminum alloy frames dominate the market with over 95% market share, benefiting from superior strength characteristics, excellent conductivity, outstanding corrosion and oxidation resistance, strong tensile properties, transportation convenience, and recyclability advantages. These frames have undergone extensive market validation

over multiple decades, establishing aluminum as the industry standard material.

The aluminum frame segment is projected to maintain steady growth rates of 8-12% annually, supported by continued solar deployment expansion and ongoing material optimization efforts. Key manufacturers focus on developing lighter-weight profiles, improved extrusion techniques, and enhanced surface treatments to extend service life and reduce overall system costs.

Glass Fiber Reinforced Composite Frames

Composite material frames represent an emerging technology segment with growth rates potentially exceeding 15-20% annually as manufacturers seek alternatives to traditional aluminum solutions. These frames offer significant weight reduction benefits, enhanced mechanical properties, excellent insulation characteristics, superior corrosion resistance, scratch resistance, and weather durability.

Composite frames particularly excel in harsh environments including desert installations, marine applications, and salt-alkaline conditions where traditional materials face accelerated degradation. Additionally, composite frame production generates reduced carbon emissions compared to aluminum processing, supporting environmental sustainability objectives.

However, composite materials face limitations including polymer material aging characteristics, particularly at component joints and cut edges. Manufacturing costs currently exceed aluminum alternatives, though this gap is narrowing with production scale increases and technology improvements.

Steel Frames

Steel frame applications remain limited due to material density concerns and resulting weight penalties. While steel offers cost advantages and high strength characteristics, increased module weight creates additional wind and snow load risks, particularly constraining distributed solar applications. Steel frames typically serve specialized applications where cost considerations outweigh weight limitations.

Key Market Players and Competitive Landscape

#Aluminum Alloy Frame Specialists

Yonz Technology stands as the global market leader, having expanded production capacity from 240,000 tons to 690,000 tons in 2024 through commissioning of a 270,000-ton facility in Wuhu and an 180,000-ton plant in Vietnam. The company plans further expansion with a 100 GW aluminum alloy frame project in Inner Mongolia for 2025, equivalent to approximately 500,000 tons additional capacity.

Anhui Xinbo Aluminum Industry Co. Ltd. maintains significant market presence through integrated aluminum processing capabilities and established customer relationships across major solar manufacturers. The company focuses on high-precision extrusion technologies and quality consistency.

CITIC Bohai Aluminium leverages parent company resources and extensive aluminum industry experience to serve photovoltaic frame markets. The company emphasizes technological innovation and production efficiency improvements.

Yingkou Changtai Aluminum Material specializes in photovoltaic applications with dedicated frame production lines and customized alloy formulations. The company serves both domestic and international markets.

Jiangsu Akcome Science & Technology integrates frame manufacturing with broader solar industry operations, providing vertical integration advantages and customer relationship synergies.

#Composite Frame Specialists

Zhejiang Zhenshi New Materials Co. Ltd. operates composite frame production with 8,100 tons current capacity, focusing on specialized applications requiring enhanced performance characteristics beyond traditional aluminum solutions.

Jiangsu Worldlight New Material Co. Ltd. currently maintains 2 GW production capacity with aggressive expansion plans targeting 40 GW over five years. This represents one of the most ambitious growth trajectories in the composite frame segment.

Zhejiang Deyilong Technology Co. Ltd. operates 8 GW current capacity with plans to

expand to 50 GW, indicating strong market confidence in composite material adoption and technological advancement.

Porter Five Forces Analysis

Threat of New Entrants: Moderate

Market entry barriers include substantial capital requirements for specialized extrusion equipment, technical expertise in alloy formulation and processing, quality certification requirements, and established customer relationships. However, growing market size and attractive margins continue attracting new participants, particularly in emerging geographic markets and alternative material segments.

Supplier Bargaining Power: Moderate to High

Primary aluminum suppliers maintain significant influence over frame manufacturers due to concentration in aluminum smelting capacity and raw material pricing volatility. Energy costs represent major input factors, creating supplier leverage during periods of energy price increases. However, multiple aluminum sources and recycling capabilities provide some supplier diversification.

Buyer Bargaining Power: High

Large solar module manufacturers possess substantial negotiating power due to volume purchasing requirements and standardized product specifications. Price sensitivity remains high as frame costs directly impact module competitiveness. However, quality requirements and delivery reliability create some supplier differentiation opportunities.

Threat of Substitute Products: Moderate

Alternative framing solutions including composite materials and steel frames present substitution threats, though aluminum's established performance record and cost structure maintain competitive advantages. Frameless module designs represent potential disruption, though structural and installation considerations limit widespread adoption.

Competitive Rivalry: High

Intense competition characterizes the market with numerous established players, limited product differentiation opportunities, and price-sensitive customers. Chinese manufacturers maintain cost leadership positions, creating pressure on international competitors. Innovation in materials, manufacturing processes, and customization capabilities provides primary differentiation strategies.

Market Opportunities and Challenges

Key Market Opportunities

The expanding global solar deployment creates substantial growth opportunities across all frame segments. Emerging applications including agrivoltaics, floating solar installations, and building-integrated photovoltaics demand specialized frame solutions with enhanced performance characteristics.

Technological advancement opportunities include development of lighter-weight aluminum alloys, improved composite material formulations, advanced surface treatments, and integrated mounting solutions. Circular economy initiatives present opportunities for enhanced recycling capabilities and sustainable material sourcing.

Geographic expansion opportunities exist in emerging markets with rapidly growing energy demand and improving solar economics. Regional manufacturing capabilities can capture local content requirements and reduce transportation costs.

Primary Market Challenges

Raw material price volatility creates significant cost pressure and margin uncertainty for frame manufacturers. Aluminum pricing correlates with energy costs and global economic conditions, creating planning challenges for long-term contracts.

Environmental regulations increasingly impact aluminum production and processing operations, requiring investment in cleaner technologies and potentially affecting cost structures. Carbon footprint considerations may favor composite materials over aluminum in certain applications.

Quality and durability requirements continue increasing as solar project financing demands 25-30 year performance warranties. Frame manufacturers must demonstrate long-term reliability while maintaining cost competitiveness.

Supply chain complexity and geographic concentration create vulnerability to disruptions, as demonstrated during recent global logistics challenges. Manufacturers require diversified sourcing strategies and regional production capabilities.

Trade policies and tariff structures affect international competitiveness, particularly for manufacturers serving global markets. Regulatory changes can significantly impact cost structures and market access opportunities.

Technology transition risks exist as alternative mounting solutions and module designs evolve. Frame manufacturers must balance current market demands with future technology requirements to maintain market position.

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