

China Concentrated Photovoltaic Market Segmented By Product (Reflectors and Refractors), By Concentration (High Concentration Photovoltaic and Low Concentration Photovoltaic), By Concentration (Commercial, Utilities and Others), By Region, and By Competition, 2018-2028F

<https://marketpublishers.com/r/CFE7E2523FBCEN.html>

Date: November 2023

Pages: 84

Price: US\$ 3,500.00 (Single User License)

ID: CFE7E2523FBCEN

Abstracts

China Concentrated Photovoltaic Market has valued at USD 159.21 million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 14.03% through 2028. China has established ambitious targets for renewable energy, with a focus on increasing the proportion of non-fossil fuels in its overall energy mix. CPV, due to its high energy conversion efficiency, is well-suited to support these objectives, and government policies actively encourage its advancement.

Key Market Drivers

Government Support & Policy Initiatives

China's concentrated photovoltaic (CPV) market has witnessed significant growth in recent years, primarily due to the unwavering support and strategic policy initiatives of the Chinese government. These policies have created a favorable environment for the development and adoption of CPV technology, leading to its rapid proliferation.

The Chinese government has demonstrated its commitment to renewable energy through various policy instruments, including subsidies, feed-in tariffs, and tax incentives. Specifically for CPV technology, the government has established subsidy programs and financial incentives to encourage both manufacturers and end-users to

invest in CPV systems. These incentives not only reduce upfront costs but also ensure a steady revenue stream for CPV power producers.

Furthermore, China's energy policy landscape has set ambitious targets for renewable energy, such as increasing the share of non-fossil fuels in the total energy mix and reducing carbon emissions. CPV technology, with its higher energy conversion efficiency compared to traditional photovoltaic systems, aligns well with these objectives. As a result, the government has actively promoted CPV technology through preferential grid access and integration policies, simplifying the connection process and enhancing the market's attractiveness.

In addition to financial incentives, the government has also invested in research and development initiatives to foster innovation in CPV technology. This support has resulted in advancements in CPV efficiency, reliability, and cost-effectiveness, making it a more appealing choice for investors and developers.

Overall, government support and policy initiatives have played a crucial role in driving the growth of the CPV market in China. As the nation continues its transition to a more sustainable energy landscape, CPV technology is expected to assume a pivotal role, with government backing ensuring a conducive environment for its expansion.

Technological Advancements & Research

Another significant driver behind the growth of the concentrated photovoltaic (CPV) market in China is the relentless focus on technological advancements and research. China has emerged as a leader in developing and implementing state-of-the-art CPV technologies, resulting in notable improvements in the efficiency and cost-effectiveness of CPV systems.

A critical area of research and innovation in CPV lies in the development of high-efficiency solar cells and optics. Chinese researchers and manufacturers have been diligently working towards enhancing CPV system efficiency through the advancement of solar cell materials and improvements in optical components, such as lenses and mirrors. These advancements have yielded CPV systems capable of achieving higher energy conversion rates, making them an appealing choice for utility-scale and distributed solar projects.

Additionally, ongoing research efforts have focused on optimizing CPV tracking systems. Accurate tracking of the sun's position is paramount to maximizing energy

capture in CPV systems. Chinese companies have invested in advanced tracking technologies, including dual-axis and azimuth tracking systems, resulting in improved overall performance and reliability of CPV installations.

Furthermore, China has also explored novel manufacturing techniques, such as 3D printing and automated assembly lines, to reduce the production costs of CPV components. This has made CPV technology more affordable and accessible, leading to its wider adoption across various applications.

Collaborative efforts between government agencies, research institutions, and private companies have played a pivotal role in advancing CPV technology in China. This synergy has created a virtuous cycle of innovation, where breakthroughs in CPV technology drive increased deployment, subsequently fueling further research and development efforts.

Environmental Concerns & Sustainable Energy

The growing awareness of environmental concerns and the imperative for sustainable energy sources serves as a significant catalyst for the concentrated photovoltaic (CPV) market in China. As the world grapples with the challenges of climate change and environmental degradation, CPV technology has emerged as a viable solution to mitigate greenhouse gas emissions and foster clean energy generation.

China, being one of the largest carbon emitters globally, faces mounting pressure to transition to cleaner and more sustainable energy sources. In this context, CPV systems offer several advantages. Firstly, they exhibit higher energy conversion efficiency compared to traditional photovoltaic systems, enabling them to harness more electricity from the same amount of sunlight. This increased efficiency contributes to a reduction in carbon emissions and aids China in meeting its emissions reduction targets.

Secondly, CPV technology is well-suited for regions with limited land availability. China's rapid urbanization and restricted space for large-scale solar installations make CPV's smaller footprint an appealing choice. CPV systems can be deployed in diverse settings, including urban rooftops and agricultural land, minimizing environmental impact and mitigating land-use conflicts.

Furthermore, the modular nature of CPV systems allows for easier scalability and integration with other renewable energy sources like wind and energy storage systems. This design and deployment flexibility further supports China's transition towards a more

sustainable and diversified energy mix.

In conclusion, the increasing awareness of environmental concerns and the urgency to combat climate change have propelled the adoption of CPV technology in China. As the nation endeavors to reduce its carbon footprint and achieve its renewable energy goals, CPV's efficiency, versatility, and minimal environmental impact make it a pivotal driver in the transition to a more sustainable energy future.

Key Market Challenges

High Initial Capital Costs

One of the primary challenges facing the concentrated photovoltaic (CPV) market in China is the comparatively high initial capital costs associated with CPV technology in contrast to conventional photovoltaic (PV) systems. CPV systems necessitate specialized components such as concentrators, high-efficiency solar cells, and precision tracking mechanisms, which tend to have higher manufacturing and installation costs. These upfront costs can present a significant obstacle for investors and project developers, especially when compared to the declining costs of traditional PV panels.

The high initial capital costs are often compounded by the requirement for skilled labor and specialized expertise in CPV system design, installation, and maintenance. This leads to increased labor expenses, which further escalate the overall project costs. Consequently, potential investors and developers may be deterred from pursuing CPV projects in favor of more financially accessible PV alternatives.

To tackle this challenge, stakeholders in the CPV market, including manufacturers and government agencies, must collaborate to identify cost reduction opportunities. This may involve advancements in manufacturing processes, leveraging economies of scale, and enhancing supply chain management. Additionally, targeted financial incentives and subsidies can help mitigate some of the upfront expenses, thereby rendering CPV projects more appealing and financially viable for investors.

Land and Space Constraints

One of the key challenges faced by the CPV market in China is the intense competition for land and space. The country's rapid urbanization and limited availability of suitable land for solar installations pose a significant obstacle to the widespread adoption of CPV systems, which typically require larger land areas compared to traditional PV

arrays.

CPV systems are specifically designed to maximize sunlight capture by utilizing tracking systems that follow the sun's path throughout the day. This necessitates a larger ground or rooftop footprint, which can be particularly challenging to secure in densely populated urban areas where space is at a premium. Moreover, the selection of appropriate locations for CPV installations is crucial, as shading from nearby buildings or structures can significantly decrease system efficiency.

Efforts to address this challenge include exploring innovative deployment options such as floating CPV systems on water bodies or integrating CPV technology with existing agricultural activities. However, it is important to note that these solutions may not always be practical or feasible in all regions, and their implementation requires careful planning and consideration of environmental factors.

Achieving a balance between the demand for land and space and the expansion of CPV installations will require strategic urban planning, effective collaboration between government agencies and private stakeholders, as well as the development of regulatory frameworks that prioritize the efficient utilization of available land resources while fostering the growth of CPV technology.

Grid Integration and Energy Storage

Grid integration and energy storage pose a complex challenge for the CPV market in China. CPV systems, like other renewable energy sources, can face intermittent power generation due to weather conditions and variations in sunlight intensity. Ensuring a stable and reliable energy supply necessitates effective grid integration and the ability to store excess energy for future use.

China's electricity grid is currently undergoing significant upgrades and modernization to accommodate a higher proportion of renewable energy sources, including CPV. Nevertheless, challenges related to grid stability, energy transmission, and aligning CPV generation with peak demand periods persist.

Energy storage solutions, such as battery storage systems, can help mitigate some of these challenges by storing surplus energy generated during sunny periods and releasing it when demand is high or sunlight is scarce. However, developing and deploying energy storage infrastructure adds complexity and cost to CPV projects.

Integrating CPV systems with energy storage also requires standardized technical and regulatory frameworks to ensure smooth operation and grid stability. This entails addressing issues related to grid interconnection, voltage fluctuations, and grid balancing.

To overcome this challenge, China should invest in grid infrastructure upgrades and incentivize the adoption of energy storage technologies. Policymakers should also consider mechanisms to promote demand response and smart grid solutions, which can help align CPV generation with peak demand periods and reduce grid stress during periods of high variability in solar energy production.

In conclusion, addressing the challenges of high initial capital costs, land and space constraints, and grid integration with energy storage will be critical for the continued growth and success of the CPV market in China. Collaborative efforts between government agencies, industry stakeholders, and research institutions will be essential to finding innovative solutions to these complex challenges and unlocking the full potential of CPV technology in China's energy landscape.

Key Market Trends

Increasing Adoption of High Concentration Photovoltaic (HCPV) Technology

One notable trend observed in the China Concentrated Photovoltaic (CPV) market is the increasing adoption of High Concentration Photovoltaic (HCPV) technology. HCPV systems distinguish themselves from traditional CPV systems through the utilization of advanced optical components, such as multi-junction solar cells and sophisticated tracking systems, enabling even higher concentrations of sunlight onto the solar cells.

This trend is propelled by the pursuit of higher energy conversion efficiencies. HCPV systems can achieve efficiencies of over 40%, surpassing traditional PV systems by a significant margin. The capability to generate more electricity from a smaller footprint makes HCPV an attractive option, particularly in areas with limited space for solar installations. As China faces land constraints in both urban and rural areas, the smaller land requirements of HCPV become a compelling advantage.

Moreover, HCPV technology finds application in utility-scale projects, often featuring megawatt or gigawatt-scale installations, where its efficiency and energy output deliver noteworthy benefits. Numerous Chinese companies and research institutions have been at the forefront of HCPV research and development, contributing to the growth of this

trend.

While HCPV technology presents significant advantages, it also poses challenges, such as the necessity for high-precision tracking systems and the potential for higher manufacturing costs. However, as the technology matures and economies of scale are achieved, HCPV is expected to gain further traction in the Chinese CPV market, contributing to enhanced overall efficiency and competitiveness.

Integration with Energy Storage Systems

Another notable trend in the China CPV market is the increasing integration of CPV systems with energy storage solutions. Energy storage addresses the intermittent nature of solar energy generation by storing excess electricity generated during sunny periods and releasing it when the sun is not shining or when demand is high. This trend aligns with China's broader efforts to enhance grid stability and reliability while optimizing renewable energy use.

The adoption of energy storage systems, such as lithium-ion batteries and flow batteries, alongside CPV installations, is driven by several factors. Firstly, it enhances the dispatchability of CPV-generated electricity, allowing for better alignment with peak demand periods. Secondly, it reduces grid stress caused by the variability of solar energy production, contributing to overall grid stability. Thirdly, energy storage enables CPV systems to continue supplying power during cloudy days or after sunset, ensuring a more reliable energy supply.

Chinese manufacturers and researchers are actively exploring energy storage solutions specifically tailored to CPV applications, optimizing battery sizing and control strategies to maximize the benefits of combined CPV and energy storage systems.

This trend is expected to gain further momentum as energy storage technologies continue to mature, and policies promoting renewable energy integration with the grid become more prevalent. The synergy between CPV and energy storage is poised to enhance the competitiveness and reliability of CPV installations in China, making them even more attractive to investors and grid operators.

Segmental Insights

Product Insights

The Refractors segment emerged as the dominant player in 2022. Refractors play a critical role in concentrating sunlight onto solar cells, thereby enhancing the efficiency and performance of CPV systems. The refractors segment in the Chinese CPV market has witnessed steady growth due to the increasing adoption of CPV technology. As CPV gains traction in utility-scale and distributed solar projects, the demand for high-quality refractors is on the rise.

The selection of materials for refractors is vital in achieving optimal light concentration. Many refractors are made from specialized materials such as acrylic or glass with specific optical properties. The segment is experiencing advancements in materials science to improve refractor durability, optical clarity, and resistance to environmental factors like UV radiation.

Cost reduction is crucial for enhancing the competitiveness of CPV technology, and therefore, reducing the cost of refractors is of utmost importance. Manufacturers are exploring cost-effective production techniques and materials to lower the overall cost of CPV systems. Achieving economies of scale and efficient supply chain management also contribute to cost reduction.

Amidst the growing global interest in renewable energy and CPV technology, Chinese refractor manufacturers have export opportunities. They can supply high-quality refractors to international CPV projects and markets where CPV is gaining popularity.

Ensuring compliance with regulatory standards and certifications is essential for refractor manufacturers. It is necessary to ensure that refractors meet safety, quality, and environmental standards for widespread market acceptance and expansion.

In conclusion, the refractors segment in the Chinese CPV market plays a crucial role in the overall growth and competitiveness of CPV technology. Advancements in materials, design, optical efficiency, and cost reduction contribute to the evolution of this segment. As CPV technology continues to shape China's renewable energy landscape and expands globally, the refractors segment is poised for continued growth and innovation.

Application Insights

The Utilities segment is projected to experience rapid growth during the forecast period. Utility-scale CPV projects in China typically consist of large installations, ranging from several megawatts to hundreds of megawatts. These projects aim to generate a significant amount of electricity for grid integration, thus contributing to the country's

renewable energy targets.

CPV systems, which utilize optical components to concentrate sunlight onto high-efficiency solar cells, require less land compared to traditional photovoltaic systems. This efficient land use is particularly advantageous in regions with limited available land, such as densely populated areas in East China.

Continuous research and development efforts in CPV technology, including improvements in solar cell efficiency and advanced tracking systems, contribute to higher overall system performance. Utilities can leverage these advancements to enhance the competitiveness of CPV projects.

Utilities in China are exploring the integration of CPV with other renewable energy sources like wind and concentrated solar power (CSP) to create hybrid renewable energy systems. These systems offer a more consistent and reliable energy output, thereby improving grid stability.

Utility-scale CPV projects demonstrate a relatively low environmental impact compared to fossil fuel power plants. They produce zero greenhouse gas emissions and require less water for cooling, aligning with China's environmental and sustainability goals.

In conclusion, the utilities segment of the China CPV market is driven by government support, efficient land use, high energy conversion efficiency, and technological advancements. As China continues to prioritize renewable energy and reduce its carbon footprint, the utilities segment is poised for continued growth, presenting opportunities for utility companies to invest in and benefit from the advantages of CPV technology.

Regional Insights

East China emerged as the dominant player in the China Concentrated Photovoltaic market in 2022, holding the largest market share. East China, encompassing provinces such as Jiangsu, Zhejiang, Anhui, Fujian, Jiangxi, and Shandong, plays a crucial role in the China Concentrated Photovoltaic (CPV) market. The region is renowned for its robust manufacturing capabilities, substantial energy demand, and supportive policy environment.

East China serves as a prominent manufacturing hub for CPV components and equipment. The region hosts numerous CPV manufacturers and suppliers, contributing to the availability of high-quality components and driving economies of scale. These

manufacturing capabilities are pivotal in reducing the cost of CPV technology.

China's central and local governments are actively promoting renewable energy, including CPV technology, through various incentives and subsidies. East China's provinces have also implemented specific policies to encourage the development of CPV projects, offering financial incentives, land concessions, and grid support.

East China benefits from abundant solar radiation, particularly in provinces like Jiangsu and Zhejiang. This favorable climate enhances the energy generation potential of CPV systems, making them an appealing option for local utilities and industries aiming to reduce their carbon footprint. East China boasts a thriving industrial and commercial sector with a significant demand for electricity. CPV systems are well-suited for distributed power generation in these settings, providing a reliable source of clean energy for factories, warehouses, and commercial complexes.

The adoption of energy storage solutions is expected to increase in East China, allowing CPV systems to provide more stable and dispatchable energy. This integration will be crucial for addressing the intermittent nature of solar power. East China may witness the development of hybrid renewable energy projects that combine CPV with other energy sources, such as wind or CSP. These integrated systems have the potential to offer a more reliable and resilient energy supply.

In conclusion, East China's CPV market benefits from its manufacturing capabilities, government support, and abundant solar resources. To succeed in the region, CPV stakeholders must continue to innovate, explore hybrid solutions, and collaborate with government agencies to overcome challenges and seize opportunities arising from the growing demand for clean energy in East China.

Key Market Players

Suncore Photovoltaic Technology Co., Ltd.

Xi'an Herui New Energy Technology Co., Ltd.

Arzon Solar

Shanghai Concentrix Solar Energy Technology Co., Ltd.

NexPower Technology Corporation

SolFocus

Sanan Optoelectronics Co., Ltd.

ZTE Corporation

Huawei Technologies Co., Ltd.

JinKo Solar Co., Ltd.

Report Scope:

In this report, the China Concentrated Photovoltaic Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

China Concentrated Photovoltaic Market, By Product:

Reflectors

Refractors

China Concentrated Photovoltaic Market, By Product:

High Concentration Photovoltaic

Low Concentration Photovoltaic

China Concentrated Photovoltaic Market, By Application:

Commercial

Utilities

Others

China Concentrated Photovoltaic Market, By Region:

East China

South-Central China

North China

South-West China

North-East China

North-West China

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the China Concentrated Photovoltaic Market.

Available Customizations:

China Concentrated Photovoltaic Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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