

Concentrated Solar Power Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Technology (Parabolic Trough, Power Tower, Linear Fresnel), By Application (Residential, Non-Residential, Utility), By Storage (With Storage, Without Storage), By Capacity (? 50 MW, > 50 to ? 100 MW, > 100 MW), By Component (Solar Field, Power Block, Thermal Energy Storage System), By Region, and By Competition, 2018-2028

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Abstracts

The global Concentrated Solar Power (CSP) market is experiencing dynamic growth and transformative developments, positioning itself as a key player in the transition towards sustainable energy sources. Characterized by its ability to harness sunlight and convert it into high-temperature thermal energy, CSP technology offers a unique and dispatchable renewable energy solution. The market's growth is underpinned by increasing global commitments to decarbonization and the diversification of energy portfolios. Utility-scale CSP projects, leveraging parabolic troughs, power towers, and linear Fresnel systems, dominate the landscape, providing grid-stabilizing power to meet the demands of a rapidly evolving energy sector. The solar field, a fundamental component in CSP configurations, plays a central role in capturing and concentrating sunlight, influencing overall project efficiency. Europe, particularly Spain, has emerged as a stronghold in the CSP market, driven by early pioneering projects, supportive policies, and a commitment to sustainable energy transition. Ongoing research and development initiatives focus on technological advancements, cost reductions, and improved storage solutions, reaffirming CSP's relevance in the global renewable energy mix. As the industry continues to innovate and scale, the Concentrated Solar Power

market stands at the forefront of a clean energy future, contributing to the global drive for carbon neutrality and resilient, dispatchable power generation.

Key Market Drivers

Renewable Energy Transition and Decarbonization Initiatives:

A primary driver for the global CSP market is the increasing emphasis on renewable energy sources as part of the broader global transition towards sustainable and low-carbon energy systems. Governments and international organizations are setting ambitious decarbonization targets to mitigate climate change, and CSP plays a crucial role in meeting these goals. The ability of CSP plants to generate clean and dispatchable power aligns with the renewable energy transition, positioning CSP as a valuable contributor to reducing greenhouse gas emissions and enhancing energy sustainability.

Energy Security and Diversification of Energy Mix:

Concerns over energy security and the volatility of fossil fuel prices drive the demand for diversified and domestically sourced energy solutions. CSP offers a reliable and dispatchable renewable energy option, providing a stable source of electricity. As countries seek to reduce dependence on imported fossil fuels and enhance energy resilience, CSP projects become strategic components of the energy mix. The diversification of the energy portfolio with CSP contributes to energy security by tapping into a consistent and indigenous resource—sunlight—to meet power demands.

Technological Advancements and Cost Reductions:

Continuous advancements in CSP technologies are significant drivers for market growth. Innovations in solar collectors, heat transfer fluids, and thermal storage systems contribute to improved efficiency, enhanced energy capture, and overall cost reductions. The industry is experiencing a shift towards higher-temperature CSP technologies, such as molten salt and supercritical carbon dioxide systems, which enable better heat retention and increased electricity generation. These technological innovations are instrumental in driving down the levelized cost of electricity (LCOE) for CSP projects, making them more economically competitive with other forms of renewable energy.

Energy Storage Integration for Grid Stability:

The integration of energy storage systems is a crucial driver for the CSP market, addressing one of the key challenges associated with the intermittency of solar energy. CSP plants with thermal energy storage capabilities, such as molten salt storage, can store excess energy during periods of high sunlight and dispatch it when needed, providing a stable and reliable power supply. Energy storage integration enhances the dispatchability of CSP, making it a valuable asset for grid stability and enabling CSP projects to operate as baseload or dispatchable power plants. As grid operators prioritize stability and reliability, the integration of energy storage solutions becomes a compelling driver for the adoption of CSP technology.

Global Push for Sustainable Development and Job Creation:

The global push for sustainable development, coupled with the desire to create green jobs, acts as a driver for the CSP market. Governments and international organizations recognize the socio-economic benefits of investing in renewable energy projects, including CSP. The development, construction, and operation of CSP plants create employment opportunities, stimulate local economies, and contribute to the growth of the renewable energy sector. As countries align their energy strategies with sustainable development goals, the positive socio-economic impacts associated with CSP projects drive support and investments in the sector.

Key Market Challenges

High Initial Capital Costs:

One of the primary challenges confronting the global CSP market is the high initial capital costs associated with the development and construction of CSP projects. The complex nature of CSP technology, including the need for specialized components such as mirrors, receivers, and thermal energy storage systems, contributes to elevated upfront expenses. These capital-intensive requirements pose a barrier to the widespread adoption of CSP, especially in comparison to other renewable energy sources like solar photovoltaics (PV) and wind energy, which have experienced significant reductions in costs. Addressing the challenge of high initial capital costs is crucial for making CSP projects economically viable and competitive within the broader energy market.

Land Use and Environmental Impact:

CSP plants often require large land areas for the installation of solar collectors, mirrors,

and other components. The extensive land use raises concerns about the environmental impact, particularly in ecologically sensitive regions. The alteration of landscapes for CSP projects can disrupt local ecosystems, potentially affecting flora and fauna. Moreover, land use conflicts may arise in areas with competing interests, such as agriculture or conservation. Striking a balance between the expansion of CSP projects and minimizing environmental impact is a significant challenge that requires careful site selection, environmental impact assessments, and sustainable land use planning.

Intermittency and Grid Integration:

The inherent intermittency of solar energy poses a challenge for CSP plants, as they depend on direct sunlight for optimal operation. Cloud cover, weather variations, and diurnal cycles contribute to fluctuations in energy production, impacting the reliability of CSP systems. Achieving effective grid integration and dispatchability is essential to address the intermittent nature of CSP. The integration of energy storage systems, such as molten salt thermal storage, helps mitigate intermittency by enabling the storage of excess energy for use during periods of low sunlight. However, the development and implementation of cost-effective and efficient storage solutions remain a challenge, impacting the ability of CSP to provide consistent and reliable power to the grid.

Competition with Declining Costs of Other Renewables:

The CSP market faces stiff competition from other renewable energy sources, particularly solar PV and wind energy, which have experienced significant cost reductions in recent years. The decreasing costs of solar PV modules and onshore/offshore wind technologies have contributed to their widespread adoption and grid parity achievements. In contrast, the comparatively slower pace of cost reduction in CSP has challenged its competitiveness. To overcome this challenge, the CSP industry must continue to innovate, optimize project designs, and explore avenues for cost reduction in manufacturing, construction, and operation.

Water Usage and Availability:

Many CSP technologies require water for cooling purposes, and water scarcity in certain regions poses a substantial challenge. Traditional CSP systems, such as parabolic trough and power tower technologies, often use water-intensive cooling methods, impacting local water resources. This challenge is particularly pertinent in arid regions where solar resources are abundant, but water availability is limited. Developing and adopting water-efficient cooling technologies or exploring alternative dry cooling

methods is crucial to mitigate the environmental and social impacts associated with water use in CSP plants.

Key Market Trends

Advancements in CSP Technologies:

The global Concentrated Solar Power market is witnessing a transformative trend driven by continuous advancements in CSP technologies. Innovations in solar collectors, heat transfer fluids, thermal energy storage, and power cycle systems are enhancing the overall efficiency and cost-effectiveness of CSP plants. High-temperature CSP technologies, such as molten salt and supercritical carbon dioxide systems, are gaining prominence, allowing for better heat retention and improved electricity generation. These technological breakthroughs contribute to increased energy capture, reduced costs, and the scalability of CSP projects, positioning the industry as a competitive player in the renewable energy landscape.

Hybridization with Other Energy Sources:

A notable trend in the CSP market is the growing emphasis on hybridization, integrating CSP systems with other energy sources such as natural gas, biomass, or photovoltaic (PV) solar. Hybrid CSP plants offer enhanced flexibility and reliability, providing a continuous and stable power supply. The combination of CSP with complementary technologies allows for uninterrupted energy production, addressing the intermittency challenges inherent in standalone CSP systems. This trend reflects the industry's commitment to delivering consistent and dispatchable renewable energy, making CSP a valuable component in integrated energy systems.

Energy Storage Integration:

Energy storage integration is a key trend shaping the global CSP market. The ability to store thermal energy for use during periods of low sunlight or high demand is crucial for CSP's competitiveness and grid integration. Advancements in thermal energy storage systems, particularly the use of molten salt and other innovative materials, enable CSP plants to provide dispatchable power, contributing to grid stability. Energy storage enhances the economic viability of CSP projects by allowing electricity generation to be decoupled from sunlight availability, making CSP a reliable and flexible renewable energy solution.

Global Expansion and Market Growth:

The global CSP market is experiencing significant expansion, with a growing number of projects across different regions. While traditional markets such as Spain and the United States continue to lead, new markets in the Middle East, North Africa, China, and Australia are emerging as key players. Governments and utilities in these regions are recognizing the potential of CSP in meeting their renewable energy targets and addressing energy security concerns. The trend towards global expansion signifies the increasing acceptance and adoption of CSP technology as a viable and sustainable solution for power generation.

Cost Reduction and Increased Competitiveness:

Cost reduction is a prevailing trend in the CSP market, driven by technological advancements, economies of scale, and improved project execution. The industry has witnessed a decline in the levelized cost of electricity (LCOE) for CSP projects, making them more competitive with other forms of renewable energy. Enhanced manufacturing processes, streamlined construction methods, and project optimization contribute to overall cost reductions. As the industry strives to achieve grid parity and compete more effectively with conventional energy sources, the ongoing trend of cost reduction is crucial for the continued growth and widespread adoption of CSP technology.

Segmental Insights

Technology Insights

Parabolic trough segment dominates in the global concentrated solar power market in 2022. Parabolic trough technology represents the cornerstone of the CSP market, contributing significantly to the global installed capacity of solar thermal power. This technology relies on curved mirrors, or parabolic troughs, to concentrate sunlight onto a receiver tube located at the focal point. The receiver contains a heat transfer fluid, typically synthetic oil, which absorbs the concentrated solar energy and reaches high temperatures. The heated fluid then transfers its thermal energy to a power cycle, usually a steam turbine, generating electricity.

Several factors contribute to the dominance of parabolic trough technology. Firstly, parabolic trough systems have a well-established track record, with commercial projects dating back several decades. The extensive operational experience and accumulated knowledge have led to a high level of confidence in the performance and reliability of

parabolic trough CSP plants. This history of successful operation positions parabolic trough technology as a proven and bankable choice for investors and developers.

Moreover, parabolic trough technology benefits from a relatively straightforward design and manufacturing process, contributing to cost-effectiveness in comparison to other CSP technologies. The simplicity of the design facilitates the scalability of projects, making parabolic trough systems suitable for large-scale solar thermal power plants. The ease of integration with conventional power cycles, such as Rankine or Brayton cycles, further enhances the appeal of parabolic trough technology for utilities seeking to adopt solar thermal solutions.

In addition to their operational and economic advantages, parabolic trough systems exhibit a high level of technological maturity. Continuous research and development efforts have led to incremental improvements, optimization of components, and the enhancement of overall efficiency. This evolution, combined with the inherent reliability of the technology, positions parabolic trough CSP as a stable and dependable choice for utility-scale power generation.

Application Insights

Utility segment dominates in the global concentrated solar power market in 2022. The utility-scale segment of the CSP market encompasses large-scale solar thermal power plants designed to generate electricity for feeding into the grid. These projects typically have a capacity ranging from tens to hundreds of megawatts, and their primary objective is to deliver a substantial and consistent supply of clean energy to meet the demands of the utility grid. The utility-scale application has become synonymous with the transformative potential of CSP technology on a grand scale.

Several factors contribute to the dominance of utility-scale CSP projects. Firstly, the economies of scale associated with large installations make utility-scale projects more cost-effective per unit of electricity generated. The size of these projects allows for significant reductions in the levelized cost of electricity (LCOE), making them competitive with other forms of electricity generation. This cost competitiveness has positioned utility-scale CSP as an attractive option for utilities and governments looking to diversify their energy mix with a reliable and dispatchable renewable resource.

Moreover, utility-scale CSP projects often leverage thermal energy storage technologies, such as molten salt, allowing them to provide dispatchable power, even when the sun is not shining. This capability enhances the reliability and grid integration

of utility-scale CSP, addressing concerns related to the intermittency of solar energy and contributing to grid stability. The dispatchable nature of utility-scale CSP aligns with the evolving needs of modern electricity grids, supporting the transition to a more flexible and resilient energy infrastructure.

The utility-scale segment has been the focal point for significant technological advancements and innovations in the CSP sector. Ongoing research and development efforts aim to improve the efficiency of utility-scale CSP projects, enhance thermal storage capabilities, and optimize overall performance. These advancements contribute to the continued growth and competitiveness of utility-scale CSP in the global energy landscape.

While residential and non-residential applications exist, their contributions to the overall CSP market are relatively modest compared to the dominance of utility-scale projects. Residential CSP applications, often in the form of solar water heaters, are prevalent in some regions but typically represent a niche market. Non-residential applications, such as industrial process heat, are valuable but do not match the scale and impact of utility-scale projects in terms of electricity generation.

Regional Insights

Europe dominates the Global Concentrated Solar Power Market in 2022. Europe, particularly Spain, has been an early pioneer in the development and deployment of CSP technologies. Spain initiated some of the world's first large-scale commercial CSP projects, such as the PS10 and PS20 solar power towers. This early experience provided European countries with a head start in understanding the technical, economic, and regulatory aspects of CSP projects, contributing to the region's leadership in the global market.

European countries have implemented supportive policy frameworks and incentives that encourage the deployment of renewable energy technologies, including CSP. Feed-in tariffs, subsidies, and other financial incentives have facilitated the development of CSP projects, making them economically viable and attractive to investors. These policies have created a conducive environment for CSP innovation and project development, positioning Europe as a leader in the global CSP market.

Europe has been at the forefront of research and development initiatives in the renewable energy sector, including CSP. The region's commitment to advancing technology and improving the efficiency of CSP systems has led to significant

innovations and breakthroughs. Ongoing research initiatives, collaborations between research institutions and industry stakeholders, and investments in cutting-edge CSP technologies have solidified Europe's position as a hub for CSP innovation.

Many European countries benefit from favorable climatic conditions and ample solar resources, particularly in the southern regions. Countries such as Spain, Italy, and Germany have abundant sunlight, which is essential for the optimal operation of CSP plants. The geographical suitability for CSP projects has encouraged the development of large-scale solar thermal power plants, further contributing to Europe's dominance in the global market.

Europe's commitment to a sustainable energy transition and the integration of renewable energy into the grid has propelled the adoption of CSP. As countries strive to reduce carbon emissions and transition away from fossil fuels, CSP projects with energy storage capabilities have gained prominence. The dispatchable nature of CSP aligns with the grid's need for stability and flexibility, further driving the technology's adoption in the region.

Key Market Players

BrightSource Energy, Inc.

Solar Millennium AG

Abengoa S.A.

Acciona Energy, S.A.

Novatec Solar GmbH

Enel SpA

Shanghai Electric Power Generation Co., Ltd.

China National Chemical Engineering & Construction Corporation

Heliand Power GmbH

SolarReserve LLC

Report Scope:

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

Concentrated Solar Power Market, By Technology:

Parabolic Trough

Power Tower

Linear Fresnel

Concentrated Solar Power Market, By Application:

Residential

Non-Residential

Utility

Concentrated Solar Power Market, By Storage:

With Storage

Without Storage

Concentrated Solar Power Market, By Capacity:

? 50 MW

\$\$\$\$ 50 to ? 100 MW

\$\$\$\$ 100 MW

Concentrated Solar Power Market, By Component:

Solar Field

Power Block

Thermal Energy Storage System

Concentrated Solar Power Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

France

United Kingdom

Italy

Spain

South America

Brazil

Argentina

Colombia

Asia-Pacific

China

India

Japan

South Korea

Australia

Middle East & Africa

Saudi Arabia

UAE

South Africa

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Concentrated Solar Power Market.

Available Customizations:

Global Concentrated Solar Power 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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