

Solar Equipment Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Equipment (Solar Panels, Mounting and Racking Systems, Tracking System, Storage System, Others), By Application (Residential, Non-Residential, Utility), By Region, By Competition, 2018-2028

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Abstracts

Global Solar Equipment Market was valued at USD 122.08 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 15.19% through 2028.

The Solar Equipment market encompasses the production, distribution, and utilization of various technological components and systems designed for harnessing solar energy from the sun and converting it into electricity or thermal energy. This market primarily revolves around equipment and devices used in solar power generation, including solar panels (photovoltaic cells), solar inverters, mounting and tracking systems, solar thermal collectors, and associated electrical and control components.

Solar equipment serves as the backbone of solar energy systems, enabling the capture, conversion, and utilization of renewable solar energy for diverse applications.

Photovoltaic solar panels are perhaps the most recognizable component, as they convert sunlight into electricity through the photovoltaic effect. In contrast, solar thermal equipment focuses on using sunlight to heat fluids for applications such as space heating, water heating, and industrial processes.

The Solar Equipment market is pivotal in the global shift toward clean and sustainable energy sources. It plays a crucial role in reducing carbon emissions, mitigating climate

change, and providing a reliable and renewable energy source for residential, commercial, industrial, and utility-scale applications. As environmental concerns grow and the demand for renewable energy solutions rises, the Solar Equipment market continues to expand and innovate, contributing to a greener and more sustainable future.

Key Market Drivers

Government Incentives and Policies

Government incentives and policies play a pivotal role in driving the global solar equipment market. As nations increasingly prioritize renewable energy sources to mitigate climate change and reduce dependence on fossil fuels, governments have introduced a range of incentives and regulations to encourage solar adoption. These policies include tax credits, rebates, feed-in tariffs, and renewable portfolio standards.

Tax credits are among the most influential incentives. For instance, the Investment Tax Credit (ITC) in the United States offers a substantial tax reduction for both residential and commercial solar installations, stimulating significant demand for solar equipment. Similarly, feed-in tariffs guarantee fixed payments for solar energy producers, creating a steady income stream and attracting investments in solar infrastructure.

Moreover, renewable portfolio standards mandate a certain percentage of a nation's energy to come from renewable sources, prompting utilities to invest in solar power generation. These government-driven initiatives create a favorable economic environment for solar equipment manufacturers and installers, fostering market growth.

Falling Solar Panel Costs

The plummeting cost of solar panels is a key driver behind the global solar equipment market's expansion. Over the past decade, advancements in solar technology, increased manufacturing efficiency, and economies of scale have led to a significant reduction in solar panel prices. This cost decline has made solar energy more accessible and appealing to residential, commercial, and industrial consumers alike.

Technological innovations, such as higher efficiency solar cells and thinner, more durable materials, have boosted solar panel performance while lowering production costs. Additionally, increased competition in the solar equipment manufacturing sector has intensified cost-cutting efforts, making solar energy an increasingly cost-competitive

option compared to traditional fossil fuels.

Environmental Concerns and Sustainability

Growing environmental concerns and a heightened focus on sustainability are driving the global solar equipment market. With the dire consequences of climate change becoming increasingly apparent, individuals, businesses, and governments worldwide are seeking cleaner and greener energy alternatives. Solar power represents a sustainable solution that produces electricity without greenhouse gas emissions or other harmful pollutants.

Consumers are increasingly choosing solar energy to reduce their carbon footprint and contribute to a more sustainable future. Businesses, too, are adopting solar power to meet corporate social responsibility goals and improve their environmental reputation. Governments are promoting solar energy as a means of achieving renewable energy targets and reducing their countries' overall carbon emissions.

This growing environmental awareness and the desire to transition to cleaner energy sources are propelling the demand for solar equipment globally, making it a driving force in the energy transition.

Energy Security and Independence

Energy security and independence are critical drivers of the global solar equipment market. Solar power offers a decentralized energy solution, allowing homes, businesses, and even entire communities to generate their electricity. This independence from centralized energy grids can enhance energy security, especially in regions prone to power outages or those reliant on energy imports.

Many countries see solar energy as a means to reduce their dependence on fossil fuel imports, which can be vulnerable to supply disruptions and price fluctuations. By harnessing their abundant solar resources, nations can strengthen their energy self-sufficiency and reduce their exposure to geopolitical tensions in the energy sector.

Furthermore, the development of solar microgrids and off-grid solar solutions is empowering remote and underserved communities to access reliable electricity, further contributing to energy security and independence.

Technological Advancements

Continual technological advancements are propelling the global solar equipment market forward. Solar technology is evolving rapidly, with ongoing research and development efforts focused on improving efficiency, storage capacity, and overall performance. Innovations such as bifacial solar panels, perovskite solar cells, and advanced inverters are enhancing the output and versatility of solar installations.

Energy storage solutions like lithium-ion batteries are becoming increasingly integrated with solar systems, enabling homeowners and businesses to store excess solar energy for use during cloudy days or at night. This advancement addresses one of the historical limitations of solar power - its intermittency - and further drives its adoption.

Increasing Energy Demand

The ever-growing global energy demand is a fundamental driver of the solar equipment market. As populations expand, economies develop, and electrification becomes more prevalent, the need for additional electricity generation capacity rises. Solar power presents an attractive solution to meet this escalating demand, particularly in regions with abundant sunlight.

Solar installations can be quickly deployed and scaled to match increasing energy needs. They are well-suited for distributed generation, allowing them to be installed close to the point of consumption, reducing transmission losses and infrastructure costs. As a result, solar energy is becoming an integral component of the global energy mix to satisfy rising electricity requirements while reducing the environmental impact of power generation.

In conclusion, the global solar equipment market is driven by a combination of government incentives, falling costs, environmental concerns, energy security, technological advancements, and increasing energy demand. These interconnected factors are propelling the adoption of solar energy worldwide and shaping the future of the renewable energy landscape.

Government Policies are Likely to Propel the Market

Feed-in Tariffs (FiTs)

Feed-in tariffs (FiTs) are one of the most influential government policies driving the global solar equipment market. This policy mechanism guarantees fixed payments to

solar energy producers for the electricity they generate, typically over a long-term contract period, often spanning 15 to 25 years. FiTs provide solar project developers with a predictable income stream, making solar investments more attractive and reducing financial risks associated with solar energy projects.

FiTs encourage the deployment of solar equipment by ensuring a favorable return on investment, especially in the early stages of a solar market's development. This policy has been successfully implemented in various countries, including Germany and Japan, resulting in significant solar capacity additions. While FiTs have proven effective, some regions have transitioned to alternative policies, such as competitive auctions and power purchase agreements (PPAs), to lower costs and promote market competition.

Investment Tax Credits (ITCs)

Investment Tax Credits (ITCs) are a critical driver of the global solar equipment market, particularly in the United States. Under this policy, solar investors can deduct a percentage of their solar project's costs from their federal income taxes. The ITC has played a pivotal role in stimulating solar adoption by reducing the upfront cost barrier for residential and commercial solar installations.

Initially set at 30%, the ITC has gradually decreased but remains a powerful incentive for solar investment. It helps attract private capital to the solar industry, facilitating continued growth and innovation in solar technology. ITCs have also encouraged solar equipment manufacturers to expand production, contributing to economies of scale and further reducing equipment costs.

Net Metering

Net metering is a policy that promotes solar energy adoption by allowing residential and commercial solar system owners to sell excess electricity back to the grid. Under net metering, when a solar installation generates more electricity than is consumed on-site, the surplus is fed into the grid, and the system owner receives credit for the excess energy. This credit can offset electricity bills, making solar energy financially advantageous.

Net metering policies vary by region, with some offering one-for-one credit for excess energy fed into the grid and others providing compensation at a lower rate. The availability of net metering encourages consumers to invest in solar equipment, as it allows them to achieve savings and potentially generate additional income from their

solar installations.

Renewable Portfolio Standards (RPS)

Renewable Portfolio Standards (RPS), also known as Renewable Energy Standards (RES), are government policies that mandate a certain percentage of a state or nation's electricity production to come from renewable sources, including solar energy. RPS policies create a market demand for solar equipment and drive the growth of renewable energy capacity.

By setting specific targets for renewable energy adoption, RPS policies encourage utilities to invest in solar projects and purchase solar-generated electricity. This policy framework has been instrumental in diversifying energy sources and reducing greenhouse gas emissions in many regions. The success of RPS policies depends on the enforcement of penalties for non-compliance and regular reviews to adjust targets based on technological advancements and market conditions.

Tax Abatements and Exemptions

Tax abatements and exemptions are government policies that reduce or eliminate property taxes or other taxes associated with solar equipment installations. These incentives are typically offered at the local or state level and are designed to make solar investments more economically viable for homeowners and businesses.

By lowering the financial burden of property taxes on solar installations, these policies help reduce the payback period for solar projects and enhance their overall return on investment. Tax abatements and exemptions are particularly attractive to commercial and industrial solar system owners, as they can significantly reduce the cost of large-scale solar installations, thereby promoting the deployment of solar equipment.

Green Energy Procurement

Green energy procurement policies are enacted by governments and businesses to source a certain percentage of their energy needs from renewable sources, including solar power. Government agencies, corporations, and institutions set targets for green energy procurement to demonstrate their commitment to sustainability and reduce their carbon footprint.

These policies create a reliable market for solar equipment manufacturers and project

developers. Businesses that seek to meet green energy procurement targets often enter into long-term power purchase agreements (PPAs) with solar project developers, providing a stable revenue stream for these projects. This, in turn, drives investments in solar infrastructure and supports the continued growth of the global solar equipment market.

In conclusion, these government policies, including feed-in tariffs, investment tax credits, net metering, renewable portfolio standards, tax abatements and exemptions, and green energy procurement, play pivotal roles in shaping the global solar equipment market. They incentivize solar adoption, drive investment, and contribute to the growth of clean, sustainable energy sources.

Key Market Challenges

Intermittency and Energy Storage

One of the primary challenges facing the global solar equipment market is the inherent intermittency of solar energy generation. Solar power production is highly dependent on weather conditions, with energy generation dropping to zero during the night and being significantly reduced on cloudy or rainy days. This variability poses challenges for grid stability and reliable energy supply, especially in regions that rely heavily on solar power.

To address this challenge, energy storage solutions, such as batteries, are becoming increasingly important. Energy storage systems store excess solar energy during periods of high generation and discharge it when the sun is not shining. While energy storage technologies have advanced considerably, challenges remain in terms of cost, efficiency, and scalability.

Cost is a significant barrier to widespread energy storage adoption. High upfront costs and the limited lifespan of some battery technologies can deter homeowners, businesses, and utilities from investing in energy storage systems. Moreover, the efficiency of energy storage solutions needs improvement to minimize energy losses during charging and discharging processes.

Scalability is another challenge. Large-scale energy storage facilities are required to support grid-level energy needs, and integrating them into existing energy infrastructure can be complex and costly. Developing standardized approaches to grid integration and improving the interoperability of different energy storage systems are ongoing

challenges for the industry.

To fully unlock the potential of solar energy, addressing the intermittency challenge and improving energy storage technologies are critical goals for the solar equipment market.

Supply Chain Vulnerabilities and Raw Material Availability

The global solar equipment market is highly reliant on complex supply chains, and disruptions in these supply chains can pose significant challenges to the industry. The solar supply chain encompasses the production of various components, including solar panels, inverters, mounting systems, and semiconductor materials. These components often rely on global sourcing of raw materials, manufacturing, and distribution.

One key challenge is the availability and price volatility of raw materials, particularly rare earth metals and silicon, which are essential components in solar panels and semiconductor devices. These materials are subject to supply constraints due to geopolitical factors, trade disputes, and fluctuating demand, leading to price fluctuations and potential shortages. Such disruptions can impact the cost-effectiveness of solar equipment and hinder market growth.

Another challenge related to supply chains is the transportation and logistics of solar equipment. Delays at ports, shipping bottlenecks, and other logistical issues can result in project delays, increased costs, and uncertainty for solar developers and installers. Additionally, regulatory changes and trade barriers can affect the flow of solar equipment across borders, further complicating the supply chain.

To mitigate these challenges, the solar industry is exploring strategies such as diversifying the sourcing of raw materials, investing in domestic manufacturing capacity, and adopting more sustainable and eco-friendly materials. Strengthening supply chain resilience and reducing dependence on vulnerable sources are essential for the continued growth and stability of the global solar equipment market.

Segmental Insights

Solar Panels Insights

The Solar Panels segment held the largest market share in 2022 & expected to maintain it in the forecast period. Solar panels, also known as photovoltaic (PV) panels, are at the heart of solar energy systems. They directly capture sunlight and convert it

into electricity using the photovoltaic effect. This fundamental role makes solar panels an essential component of virtually all solar installations, from residential rooftops to utility-scale solar farms. Solar panels are versatile and can be used in a wide range of applications, making them suitable for various consumer and industrial needs. They can be installed on residential buildings, commercial structures, and open spaces, providing a scalable solution for energy generation. Over the years, significant advancements in solar panel technology have improved their efficiency and performance. Research and development efforts have led to the development of more efficient solar cell materials, better designs, and improved manufacturing processes. These innovations have made solar panels more attractive by increasing their electricity generation capacity. The declining cost of solar panels has been a pivotal factor in their dominance. Solar panel prices have dropped substantially due to economies of scale, improved manufacturing efficiency, and increased competition among manufacturers. This cost reduction has made solar energy more accessible and financially appealing to a broader range of consumers. Solar panels can be easily scaled up or down to meet various energy needs. This scalability makes them suitable for a wide spectrum of projects, from small residential installations to massive utility-scale solar farms. Their adaptability to diverse project sizes further solidifies their dominance. Solar panels are well-standardized and widely available from numerous manufacturers worldwide. This standardization ensures compatibility with various system components and simplifies the procurement and installation process. Governments in many countries have implemented incentives and policies that specifically target solar panel installations. These incentives include tax credits, rebates, feed-in tariffs, and renewable energy mandates. Such policies encourage individuals, businesses, and utilities to invest in solar panels, further propelling their dominance. Solar panels offer significant environmental benefits by producing electricity without emitting greenhouse gases or harmful pollutants. This aligns with global efforts to reduce carbon emissions and combat climate change, making solar panels an attractive choice for environmentally conscious consumers and organizations.

Utility Insights

The Utility segment held the largest market share in 2022 and is projected to experience rapid growth during the forecast period. Utility-scale solar projects are characterized by their sheer size and capacity to generate electricity on a massive scale. These projects often consist of thousands to millions of solar panels spread across extensive areas of land. This large-scale generation capacity makes utility-scale solar a significant contributor to global solar energy production. Utility-scale solar projects benefit from economies of scale. Bulk purchasing of solar panels and other equipment, streamlined

installation processes, and efficient maintenance practices lead to lower costs per installed watt. This cost-effectiveness is a major driver of utility-scale solar dominance, as it makes utility-scale solar energy competitive with or even cheaper than fossil fuels in many regions. Utility-scale solar installations are designed to feed electricity directly into the grid. This seamless integration into the existing electrical infrastructure enables the widespread distribution of renewable energy. Utilities can distribute the electricity generated by these projects to meet the energy demands of entire cities or regions, contributing to grid stability and reliability. Many governments around the world have recognized the importance of utility-scale solar in achieving renewable energy and climate goals. Consequently, they have implemented policies and incentives to encourage the development of these projects. These policies often include favorable feed-in tariffs, power purchase agreements (PPAs), and tax incentives that make utility-scale solar investments financially attractive. Utility-scale solar projects require significant land or open spaces, and they are often situated in regions with ample sunlight and available land resources. The availability of suitable land, combined with favorable weather conditions, supports the growth of utility-scale solar installations. As countries strive to reduce carbon emissions and transition to cleaner energy sources, utility-scale solar plays a critical role in achieving renewable energy targets. Governments and utilities invest heavily in these projects to meet their renewable energy goals and reduce their carbon footprint. Utility-scale solar projects offer consistent and predictable electricity generation. Unlike smaller residential systems, which can be affected by shading and other factors, utility-scale projects are carefully designed and monitored for optimal performance. This reliability is attractive to utilities and grid operators. Utility-scale solar projects create jobs and stimulate local economies. The development, construction, and ongoing operation of these projects provide employment opportunities and generate revenue for host communities.

Regional Insights

Asia Pacific

The Asia Pacific region was the largest market for solar equipment, accounting for over 50% of the global market share in 2022. The region is expected to maintain its dominance in the coming years due to the growing demand for renewable energy in countries such as China, India, and Japan.

China was the world's largest solar equipment market, followed by India. China is also a

major exporter of solar equipment, accounting for over 70% of global solar panel exports in 2022.

Other major markets in the Asia Pacific region include Japan, South Korea, and Australia. These markets are expected to grow at a significant pace in the coming years due to government policies and incentives to support the adoption of solar energy.

North America

North America was the second-largest market for solar equipment, accounting for over 20% of the global market share in 2022. The United States is the largest market in North America, followed by Canada.

The growth of the solar equipment market in North America is being driven by a number of factors, including declining costs of solar panels and other solar equipment, government policies and incentives to support the adoption of solar energy, and growing demand for renewable energy.

Europe

Europe was the third-largest market for solar equipment, accounting for over 15% of the global market share in 2022. Germany is the largest market in Europe, followed by Italy and Spain.

The growth of the solar equipment market in Europe is being driven by a number of factors, including government policies and incentives to support the adoption of solar energy, and growing demand for renewable energy.

Key Market Players

JinkoSolar Holding Co., Ltd.

JA Solar Technology Co., Ltd.

Trina Solar Co., Ltd.

LONGi Solar Technology Co., Ltd.

Canadian Solar Inc.

First Solar, Inc.

Hanwha Q CELLS Co., Ltd.

Risen Energy Co., Ltd.

Talesun Solar Technology Co., Ltd.

Shunfeng International Clean Energy Co., Ltd.

Report Scope:

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

Solar Equipment Market, By Equipment:

Solar Panels

Mounting and Racking Systems

Tracking System

Storage System

Others

Solar Equipment Market, By Application:

Residential

Non-Residential

Utility

Solar Equipment Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Competitive Landscape

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

Available Customizations:

Global Solar Equipment 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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13.9.1. Business Overview

13.9.2. Key Revenue and Financials

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13.9.4. Key Personnel/Key Contact Person

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13.10. Shunfeng International Clean Energy Co., Ltd.

13.10.1. Business Overview

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13.10.4. Key Personnel/Key Contact Person

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14. STRATEGIC RECOMMENDATIONS

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