

South & Central America Portable Integrated Photovoltaic Market Size and Forecast (2021 - 2031)

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Abstracts

The South America Portable Integrated Photovoltaic (PIPV) Market is projected to grow significantly, reaching an estimated US\$ 79.3 million by 2031, up from US\$ 32.4 million in 2024. This growth represents a compound annual growth rate (CAGR) of 13.8% from 2025 to 2031, indicating a robust expansion in this niche market.

Executive Summary and Market Analysis

The PIPV market in South America is primarily segmented into three regions: Brazil, Argentina, and the rest of South America. Although the market is relatively small compared to other global regions, it is experiencing gradual growth. This expansion is largely driven by an increase in recreational activities and a rising interest in sailing and other leisure pursuits. As disposable incomes rise, more individuals are investing in recreational options, further propelling market growth.

Brazil stands out as a key player in the recreational market within the region. With its extensive coastline, stunning beaches, and a growing number of affluent tourists, Brazil is an ideal hub for recreational activities, including yachting and various water sports. The burgeoning middle class, coupled with an increasing number of travel enthusiasts and a thriving tourism sector, is contributing to the rising demand for solar-powered products such as solar backpacks, chargers, and portable power stations.

Strategic Insights

Market Segmentation

The South America Portable Integrated Photovoltaic Market is categorized by

application into two main segments: Emergency Power Backup and Leisure and Recreational Activities. As of 2024, the Leisure and Recreational Activities segment holds the largest market share, reflecting the growing trend of outdoor and adventure activities among consumers.

Market Outlook

Government incentives such as tax credits, subsidies, and grants for solar technology are crucial in lowering financial barriers for consumers, thereby boosting the demand for portable photovoltaic solutions. Collaborations between businesses and governmental organizations can lead to the development of solar-powered solutions tailored for remote communities, disaster preparedness, and military applications.

In Colombia, for instance, Law 1715 offers significant benefits for solar investments, including a 50% income tax deduction, exemptions from VAT and import duties, and accelerated depreciation. This law also allows self-generators to feed surplus energy back into the grid, promoting distributed generation where compact PIPV solutions can thrive. Similarly, Brazil's regulatory framework supports distributed generation through ANEEL and Law 14.300, which guarantees net metering, enabling small- and mid-scale photovoltaic systems to offset energy costs effectively.

Globally, government policies and incentives are pivotal in driving the adoption of solar technologies, including PIPV systems. Financial incentives such as tax credits, grants, rebates, and feed-in tariffs help reduce the upfront costs associated with solar installations, making renewable energy solutions more accessible to households, businesses, and remote communities. Programs that offer income tax deductions, VAT exemptions, and net metering encourage residential and distributed generation, while production-linked incentives bolster domestic manufacturing of photovoltaic systems. Furthermore, governments are increasingly partnering with organizations to deploy solar-powered solutions for disaster preparedness, military applications, and off-grid areas, thereby broadening the market's reach. The establishment of regulatory frameworks and renewable energy targets provides predictable returns for investors, enhancing market confidence.

Country Insights

The South America Portable Integrated Photovoltaic Market is further segmented by country, with Brazil, Argentina, and the Rest of South America being the primary divisions. Brazil is expected to maintain the largest market share in 2024.

Brazil's vibrant recreational culture and participation in various leisure events contribute significantly to the demand for portable integrated photovoltaics. The country's coastal cities, including Rio de Janeiro, S?o Paulo, and Santa Catarina, are hotspots for recreational activities. The government's commitment to enhancing tourism infrastructure further supports this growth. According to rankings from the US News and World Report, Brazil was recognized as the best country for adventure tourism in 2024. The country's diverse landscapes, ranging from the Amazon rainforest to the breathtaking Iguazu Falls and the unique ecosystems of the Pantanal and Chapada Diamantina, offer a plethora of recreational opportunities, including rafting, hiking, climbing, diving, and surfing. Adventure hubs like Brotas (S?o Paulo) and Bonito (Mato Grosso do Sul) attract visitors seeking thrilling experiences and a connection with nature. With over 7,000 km of coastline, Brazil is a paradise for water sports enthusiasts, further driving the demand for portable integrated photovoltaic solutions.

Company Profiles

Key players in the South America Portable Integrated Photovoltaic Market include Duracell Inc., ALLPOWERS Industrial International Co., Ltd., EcoFlow Inc., Jackery Inc., Bluetti Power Inc., RICH Solar, Renogy International, BioLite, PowerFilm Solar, Inc., and ACOPower. These companies are employing various strategies such as market expansion, product innovation, and mergers and acquisitions to enhance their product offerings and increase their market share.

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