

## European and US developers retain leadership as China moves towards top market

European and US participants still lead the utility-scale<sup>[1]</sup> solar market, even as China moves towards the top of the national league table. China accounted for 30% of the 6 GW of new capacity connected in the last 12 months, taking the global total over 12 GW, according to analysis by industry experts Wiki-Solar.

The top ten project developers,<sup>[2]</sup> based on their cumulative utility-scale installations are:

Rank	Chg	Developer	Sites	MWp
1	↑	First Solar	11	759
2	→	Juwi Solar	16	406
3	↓	SunEdison	15	380
4	↑	Activ Solar	6	335
5	↑	Belectric	5	290
6	↓	Huanghe Company	4	270
7	↓	Solarhybrid (now defunct)	11	233
8	↑	CECEP (China Energy)	10	213
9	↑	China Guodian Corporation	7	202
10	↓	SunPower Corporation	7	201

Top project developers for utility-scale (10MW+) solar power stations, showing their cumulative capacity to mid March 2013

Source: Wiki-Solar.org

Though Chinese developers were responsible for most installations in their home country, they are less active internationally. Meanwhile developers like First Solar, Juwi and SunEdison, who lead the world rankings, operate across a broader range of countries.

“The geographic profile of the market is changing radically, with more countries joining and passing Germany and Spain at the top of the international league table”, says industry expert Philip Wolfe. “So the leading companies are responding by taking their expertise into these emerging markets.”

The table of top EPC contractors<sup>[3]</sup> shows similar trends with nine German companies in the top 15.

“Chinese companies have yet to become prominent outside their home market, except of course in the supply of solar modules and inverters”,<sup>[4]</sup> says Wolfe, “but that may change as China’s share of the global installed market continues to grow. Having said that, the pipeline of known projects suggests that China could be overtaken at the top of the national league table – within a few months – by the USA.”



The leading countries<sup>[5]</sup> by cumulative installed capacity are:

Rank	Chg	Country	Cumulative		Developing	
			Sites	MWp	Sites	MWp
<b>Total</b>			<b>487</b>	<b>12,364</b>	<b>213</b>	<b>11,236</b>
1	→	Germany	101	2,774	19	51
2	↑	China	116	2,765	18	521
3	↑	United States	65	2,204	41	6,700
4	↓	Spain	64	1,063	23	207
5	↑	India	45	844	16	275
6	↓	Italy	22	569	8	26
7	↑	France	13	484	3	18
8	↓	Canada	17	412	14	296
9	→	Ukraine	6	335	0	1
10	↑	Thailand	6	245	7	170

Top project markets for utility-scale (10MW+) solar power stations, showing their cumulative capacity to mid March 2013 and capacity under development Source: Wiki-Solar.org

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### Notes for editors:

- [1] Wiki-Solar defines ‘utility-scale’ as projects of 10MW and over.
- [2] The list of top developers is available at: <http://www.wiki-solar.org/company/developer.html>
- [3] The top EPC contractors are listed at: <http://www.wiki-solar.org/company/contractor.html>
- [4] Solar module suppliers are listed at: <http://www.wiki-solar.org/company/modules.html> and inverter suppliers at: <http://www.wiki-solar.org/company/inverters.html>
- [5] The full countries list is available at: <http://www.wiki-solar.org/country.html>

The statistics for these solar projects are collated by wiki-solar.org, and shown on an interactive global map at: <http://www.wiki-solar.org/map.html>.

Wiki-Solar’s database includes a total of about 500 operational solar generating stations of 10MW and above, with a further 300 sites under development (but not included in the figures, until they become operational). Projects of 10MW are typically capable of providing an annual output equivalent to the consumption of 3,000 households.

The total capacity figures are likely to be understated due to time delays in the publication of some projects after they are commissioned. Wiki-Solar updates its records continuously, so the national and global data is likely to evolve, with increases to some figures, after this release is issued.

Projects are now being developed at capacities up to ½GW (500MW). The largest plant currently operating – and still under construction by First Solar – is NRG Energy and MidAmerican Energy’s Agua Caliente Solar Farm in the South West corner of Arizona. This topped 250MW in capacity in September and will eventually total over 300MW.

Philip Wolfe’s book “Solar Photovoltaic Projects in the mainstream power market” was published by [Routledge](http://www.routledge.com) in October.

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