

Top EPC contractors chase world's more resilient utility-scale solar markets

The list of the world's top solar EPC contractors released today by Wiki-Solar.org shows how the less volatile markets have favoured their incumbent power plant builders. In particular, contractors from India and the US are rising up the ranking. Europeans have, with a few notable exceptions, found it harder to hold their position.

The top contractors, based on cumulative capacity to the end of 2018 were:

Rank	EPC contractor <small>© wiki-solar.org</small>	Projects number	Capacity MW _{AC}
1	First Solar [US]	56	4,088
2	Sterling & Wilson [IN] (part of Shapoorji Pallonji Group)	58	2,663
3	Swinerton Renewable Energy [US]	106	2,608
4	Abengoa Solar including Abener [ES]	30	1,680
5	Juwi Solar [DE] including JSI construction [US]	120	1,623
6	Enerparc [DE]	180	1,557
7	SunEdison [US] including Enfinity (now in insolvency)	54	1,335
8	Belectric [DE] (now part of Innogy)	106	1,316
9	Bharat Heavy Electricals [IN]	11	1,238
10	Mortenson Construction [US]	15	1,160
11	Acciona Energía [ES]	18	879
12	Elecnor [ES]	31	808
13	McCarthy Building [US]	36	796
14	Mahindra [IN]	16	782
15	SunPower Corporation [US] including Sunray Renewable	37	760
16	Bechtel [US]	3	752
17	Canadian Solar [CA] including Recurrent Energy [US]	25	742
18	ACS Group [ES]	10	725
19	TSK Group [ES]	12	592
20	Conergy [DE] (part of Kawa Capital)	50	582
21	Eiffage [FR]	9	580
22	Tata Power [IN]	9	571
23	Hanwha Q.Cells [KR] including Q-Cells [DE]	31	560
24	RCR Tomlinson [AU] (now in insolvency)	6	551
25	BayWa r.e. [DE]	39	530
26	IB Vogt Solar [DE]	51	515

Top utility-scale solar EPC contractors with at least ½ GW_{AC} commissioned

First Solar retains top spot thanks largely to plants installed up to 2016. Its annual ranking in the last two years has been around number ten. “The top positions in 2017 and 2018 have been dominated by Indian contractors like Sterling & Wilson, BHEL and Mahindra, and US constructors led by Swinerton, Mortenson and McCarthy” says Wiki-Solar founder Philip Wolfe.



Abengoa joins the list because Wiki-Solar now includes solar thermal projects, but is likely to slip down the rankings because CSP construction has declined. More volatile market dynamics have led several other European contractors to lose ground. However, Juwi and Enerparc have stayed in the top-6, while Elecnor is climbing again after sliding to #20 in 2016. Growth in the Mexican market, meanwhile, has boosted Spanish constructor TSK Group, while projects in Brazil and Egypt are lifting Italian contractor Enerray.

Australia's rapid advance in utility-scale solar is reflected by entry to the list of RCR Tomlinson, which however collapsed in November after reportedly becoming over-extended.

Wiki-Solar points out that the contributions of some participants, both on and off the list, may be understated, because it holds data on the contractors for only about 30% of projects. "Several leading players keep us informed about their contributions", says Wolfe, "but the involvement of others may be substantially understated." In particular there should be more Chinese companies in the top ranks than shown here because "Chinese projects tend not to publish details of the EPC contractors".

It should be noted that this list totals only commissioned projects for which the companies acted as EPC contractors. Many of those listed also act as project developers or in other roles, and are responsible for more overall capacity than is shown here.

T E X T E N D S

Notes for editors:

- [1] This release on the UK utility-scale solar market is available here: http://wiki-solar.org/library/public/190225_Top_utility-solar_EPC_contractors.pdf
- [2] Further details of the top EPC contractors are available here: <http://wiki-solar.org/company/contractor/index.html>
- [3] Wiki-Solar defines 'utility-scale solar' as more than 4 MW_{AC} (~ 1,500 households in Europe) see: <http://wiki-solar.org/data/glossary/utility-scale.html>.
- [4] 'Solar Photovoltaic Projects in the mainstream power market' was [published](#) in 2012.
- [5] Wiki-Solar's database covers over 10,000 utility-scale solar projects, of which about two-thirds are operational, and the remainder are under construction or development. These figures are based solely on operational capacity; projects under development are excluded until they have been commissioned.

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