

## New EPC contractors emerge as utility-scale solar markets broaden

New players are climbing up the league table of the world’s top EPC contractors, thanks to the emergence of new markets for utility-scale solar power like Egypt, Vietnam and Australia.

The top engineering, procurement and construction contractors, based on cumulative capacity are:

Rank	EPC contractor	Cumulative to date		Change since end 2017		
		Plants	GW	Plants	GW	Rank
1	First Solar [US]	58	4.221	4	0.348	11
2	Swinerton Renewable Energy [US]	107	3.285	18	1.238	2
3	Sterling & Wilson [IN] (part of SP Group)	58	2.650	8	1.375	1
4	juwi AG [DE]	125	1.842	10	0.389	9
5	ACME Solar [IN]	42	1.724	6	0.790	3
6	Belectric [DE] (now part of Innogy)	134	1.697	21	0.265	13
7	Abengoa Solar [ES]	30	1.679			
8	Enerparc [DE]	203	1.626	54	0.407	7
9	Mahindra [IN]	39	1.612	4	0.356	10
10	SunEdison [US] (in insolvency)	54	1.382	3	0.232	17
11	Mortenson Construction [US]	16	1.210	1	0.252	14
12	Acciona Energía [ES]	20	1.103	5	0.525	6
13	McCarthy Building [US]	39	0.896	10	0.217	19
14	Scatec Solar [NO] (part of Scatec AS)	28	0.858	13	0.582	5
15	ACS Group [ES] & UGL Limited	15	0.836	4	0.301	12
16	Datong Guotou [CN]	1	0.820	0	0.000	
17	Elecnor [ES]	31	0.805	2	0.224	18
18	Bechtel [US]	3	0.753	0	0.000	
19	Canadian Solar [CA] & Recurrent Energy	24	0.727	1	0.182	22
20	RCR Tomlinson [AU] (in insolvency)	7	0.718	7	0.718	4
21	SunPower Corporation [US]	36	0.712	2	0.021	
22	IB Vogt Solar [DE]	56	0.665	5	0.245	15
23	Eiffage [FR]	10	0.663	1	0.098	
24	TSK Group [ES]	13	0.657	4	0.236	16
25	Sener [ES]	8	0.584	2	0.184	21
26	Gransolar [ES]	11	0.555	2	0.390	8
27	Hanwha Q.Cells [KR] (part of Hanwha)	31	0.549	1	0.008	
28	BayWa r.e. [DE]	41	0.548	7	0.191	20
29	Egnatia Energy & Metka-Egn [GR]	64	0.528	9	0.128	24
30	Tata Power [IN]	9	0.518	1	0.160	23

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### Top utility-scale solar EPC contractors with at least ½ GW<sub>AC</sub> cumulative commissioned capacity

The biggest climber is Norway’s Scatec Solar; up 20 places since the start of 2018 thanks to projects in Egypt, Brazil, Jordan and Malaysia. Spanish contractors Acciona, ACS, Gransolar, Sener and TSK are all climbing, buoyed by revival of their home market, and projects in South America. The burgeoning Australian market led to the rise of RCR Tomlinson but also to its collapse last November after reportedly becoming over-extended.



“The top spot is now under threat” says Wiki-Solar founder Philip Wolfe “with Sterling & Wilson, Swinerton, and Acme having installed 3½ GW between them in the last 18 months. First Solar is focussing on solar module production and now less frequently handles downstream EPC activities, adding only about 1/3 GW in this period. Similarly, manufacturers SunPower Corporation and Hanwha Q-Cells have become less involved in power plant construction and are slipping down the list; as is Bechtel, which seems to have been inactive in this sector for the last 5 years.

The three top German contractors Juwi, Belectric and Enerparc are managing to hold position, partly through overseas activity in the Americas and Asia, including the explosive Vietnam market. The emerging market in Turkey in 2017 helped Metka-Egn join the list for the first time.

Most EPC contractors also offer Operations and Maintenance services for the projects they build, so the list of top O&M contractors is similar to the EPC table above. Some contractors also maintain plants built by others, so companies like British Solar Renewables rank higher in the O&M list than as an EPC.

Wiki-Solar’s lists are built from the bottom up – totalling the capacity of utility-scale solar projects on its database. Wolfe points out that this means the contributions of some – both on and off the list – are higher than shown, because for some projects the EPC contractor is not known. “Many leading players keep us informed about their contributions; but the involvement of others may be substantially understated”, he says. There should, for example, be more Chinese companies in the top ranks than shown here, because participation in Chinese projects is less widely reported.

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. Wiki-Solar has confirmed that it will be publishing its list of top project developers later this month.

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/191009\\_Leading\\_utility-solar\\_EPC\\_contractors.pdf](http://wiki-solar.org/library/public/191009_Leading_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] Further details of the top EPC contractors are available here: <http://wiki-solar.org/company/maintenance/index.html>
- [4] Wiki-Solar defines ‘utility-scale solar’ as more than 4 MW<sub>AC</sub> (~ 1,500 households in Europe) see: <http://wiki-solar.org/data/glossary/utility-scale.html>.
- [5] ‘Solar Photovoltaic Projects in the mainstream power market’ was [published](#) in 2012.
- [6] Wiki-Solar’s database covers over 10,000 utility-scale solar projects, of which about three-quarters are operational, and the remainder are in 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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