

United Kingdom breaks into solar power's top division

The UK has entered the top twenty utility-scale^[1] solar markets for the first time, at number 14, thanks to a buoyant first quarter. Sixteen large projects, including five of 10 MW or more, were completed in the 3-months to 31st March, when support under the Renewables Obligation was reduced. The UK's largest project of 33MW was completed on the former airfield at Wymeswold.

The top twenty countries for utility-scale solar power generation, based on their cumulative installations^[2] are:

Rank	Year Chg	Country	Cumulative:		5MW+	
			10MW+	MWp	Sites	MWp
		Total	535	12,948	976	15,698
1	→	Germany	105	2,846	188	3,372
2	↑	China	119	2,806	137	2,932
3	↑	United States	65	2,167	102	2,403
4	↓	Spain	72	1,140	156	1,683
5	↑	India	63	1,104	123	1,424
6	↓	Italy	24	589	55	790
7	↑	France	13	484	23	559
8	→	Ukraine	8	433	9	441
9	↓	Canada	17	412	18	418
10	→	Czech Republic	9	188	23	271
11	→	Thailand	9	181	24	348
12	→	Bulgaria	4	155	7	170
13	↑	Peru	4	80	4	80
14	↑	United Kingdom	5	78	62	391
15	↓	Korea (South)	5	77	6	95
16	↓	Portugal	2	57	5	78
17	↓	Japan	2	29	5	48
18	↑	Puerto Rico	1	24	1	24
19	↓	Slovak Republic	1	18	1	18
20	↑	Mauretania	1	15	1	15

Top markets for utility-scale solar power stations, showing their cumulative capacity in early April 2013

Source: Wiki-Solar.org

The UK ranks even better – perhaps as high as number 10 – based on installations of 5 MW and above.^[3] “A lot of the British solar power plants were installed under the Feed-in Tariff mechanism (FITs), which is capped at 5 MW”, explains industry expert Philip Wolfe; “and

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many of the recent projects were first designed and consented on that basis, even if now registered for the Renewables Obligation, rather than the FITs.”

Germany reaps ‘first mover’ advantage

While this rapid growth augurs well for the UK’s domestic photovoltaic industry, German companies have also brought the benefits of their expertise from the world’s leading market. Two of the top ten developers, and four of the top ten EPC contractors, are from Germany according to Wiki-Solar’s figures. The leading owner/operator is the UK company Lightsource Renewable Energy with 158MW of capacity over 5MW.

Several of the top developers listed below undertake their own construction, and they are joined in the list of leading EPC contractors by Martifer from Portugal; Germany’s SAG Solarstrom and Abakus; and the UK’s Stepnell, T Clarke and Anesco.

Rank	Top developers in the UK	Sites	MWp
1	Lark Energy [GB]	5	53
2	Vogt Solar [DE]	8	47
3	Low Carbon [GB]	7	46
4	Hive Energy [GB]	6	32
5	Solarcentury [GB]	3	26
6	Orta Solar [GB]	4	24
7	Abbey Renewables [GB]	2	17
8	Wirsol Solar [DE]	3	16
9	British Solar Renewables [GB]	3	15
10	MO3 Power [GB]	2	11

Top UK project developers, based on their cumulative capacity of 5MW+ installations completed by end March 2013

Source: Wiki-Solar.org

Global context

The UK still has some way to go before it can contend for a world title. There are 10 plants over 120MW in Germany, China, USA and India; each of which has installed over 1,000 MW of utility-scale capacity. The UK’s largest plant Wymeswold at 33MWp clocks in at number 98 in the global rankings, currently led by the 250MW Agua Caliente project in Arizona.

Worldwide capacity of utility-scale plants is now approaching 13,000 MW.^[2]

The government’s attitude to the UK’s recent success is unknown, with DECC declining to comment. Though ministers have recently been more positive about solar power in general, it is unclear if they still view large-scale solar as a ‘threat’.^[4]

These figures are due to be presented at this week’s large-scale solar conference in Truro.

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Notes for editors:

- [1] Wiki-Solar defines ‘utility-scale’ as projects of 10MW and over.
- [2] The list of top countries is available at: <http://www.wiki-solar.org/country.html>
- [3] The statistics on 5 MW installations should be reasonably accurate for the UK, but may be less representative in other markets, because Wiki-Solar’s primary database is for projects 10 MW+. The UK’s 5 MW+ position may therefore be overstated.
- [4] [Secretary of State] “Huhne takes action on Solar farm threat”; headline on government announcement about emergency review of the Feed-in Tariffs in 2011.

The statistics for utility-scale solar projects are collated by [wiki-solar.org](http://www.wiki-solar.org), and shown on an interactive global map at: <http://www.wiki-solar.org/map.html>. Its database includes more than 500 operational solar generating stations of 10MW+ (almost 1,000 of 5MW+). A further 300 sites (400 at 5MW+) are under development, but not included in the statistics until they become operational.

Though the majority of owners, developers and contractors have validated Wiki-Solar’s data, not all of the UK solar parks included in these statistics have yet confirmed completion. Some totals may be understated due to publication delays. Wiki-Solar updates its records continuously, with input from industry participants, so data is constantly evolving.

Projects of 10MW have typical annual output equivalent to the consumption of 3,000 households.

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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