

Top EPC contractor list reflects changing utility-solar markets

A mid-year update to the list of top solar EPC contractors reflects the competition between Germany, India and the UK for the world number 3 spot behind China and the USA, according to figures released today by Wiki-Solar.org^[1]. India had overtaken Germany by the end of 2015, and may have leapfrogged the UK into third place when the 2016 half-year figures are published in the next few weeks.

Companies active in these markets are the main climbers in the latest list of the world's top 25 EPC contractors.

Rank	EPC contractor © wiki-solar.org	Projects number	Capacity MW _{AC}
1	First Solar [US]	45	3,497
2	Juwi Solar [DE] (including JSI construction)	72	980
3	Swinerton Renewable Energy [US]	51	967
4	Belectric [DE]	90	959
5	Sterling & Wilson [IN] (part of: Shapoorji Pallonji Group)	40	835
6	Enerparc [DE]	92	825
7	SunEdison [US] (including Enfinity)	46	746
8	Q-Cells [DE] (now: Hanwha Q.Cells)	30	558
9	SunPower Corporation [US] (inc. Sunray Renewable)	26	474
10	Activ Solar [AT]	11	466
11	Conergy [DE] (part of: Kawa Capital; including Wirsol)	38	456
12	Eiffage [FR]	7	443
13	TBEA SunOasis [CN] (part of: TBEA)	8	440
14	IB Vogt Solar [DE]	47	409
15	Canadian Solar [CA] (including Recurrent Energy)	22	385
16	Bechtel [US]	2	376
17	Amec Foster Wheeler [GB]	10	368
18	RES Group (Renewable Energy Systems) [GB]	13	362
19	Trina Solar [CN]	2	340
20	Martifer [PT]	33	318
21	Phoenix Solar [DE]	31	292
22	BayWa r.e. [DE]	20	268
23	Solarcentury [GB]	26	254
24	Yingli Solar [CN]	7	251

Top utility-scale solar EPC contractors with at least ¼ GW_{AC} commissioned



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Growth in the Indian market has helped Sterling and Wilson to be a prominent climber – up to fifth place. India’s other leading specialist EPC, Larsen and Toubro, has fewer published recent PV projects and falls just outside the list, partly because Wiki-Solar does not count CSP plants. Both companies are likely to advance as India progresses the installation of its 10-GW pipeline of tendered projects.

Other climbers in the utility-scale^[2] EPC list are Belectric, Enerparc, Solarcentury and BayWa RE, who have been prominent in the UK. All are pursuing new opportunities, to compensate for the expected demise of the British market^[3], after the current rush to complete the remaining pre-accredited projects.

Of course, participants in other major markets are also thriving. US projects due for completion in the second half should give further impetus to First Solar, Swinerton and RES Group in particular; though some are dependent on troubled developer Sunedison. Recent projections suggest that the US solar industry is set to create 30,000 new jobs in 2016.

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 50% of projects. “Most leading players keep us informed about their contributions”, says Wiki-Solar founder Philip Wolfe, “but the involvement of others may be understated, typically by half.” 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 projects for which the companies acted as EPC contractors. Many of those listed also act as project developers, so could be 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/160707_Top_utility-solar_EPC_contractors.pdf
- [2] Following a consultation, Wiki-Solar defines ‘utility-scale solar’ as 4 MW_{AC} and over; see: <http://wiki-solar.org/data/glossary/utility-scale.html>. A capacity rating of 4 MW_{AC} equates roughly to the consumption of 1,500 households in Europe.
- [3] For the record, the expected slow-down in the UK is not an effect of the so-called ‘Brexit’ decision. The government had moved to close the Renewables Obligation, throttle back the Feed-in Tariffs and restrict planning approvals some months before the Referendum.
- [4] ‘Solar Photovoltaic Projects in the mainstream power market’ was [published](#) in 2012.
- [5] Wiki-Solar’s database covers over 5,500 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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