

Mainstream energy companies pile into utility scale solar

Established utility companies are strengthening their hold on the large-scale solar business according to the latest figures published by industry experts Wiki-Solar. Five of the top-9 project developers – and nine of the top-12 plant owners – are mainstream energy companies.

This list of the top project developers, based on cumulative capacity, shows their overall position and where they rank according to new capacity commissioned since the beginning of 2018.

Rank	Project developer	Cumulative to date		Change since end 2017		
		Plants	GWac	Plants	GWac	Rank
1	First Solar [US]	70	4.637	9	0.722	8
2	Canadian Solar [CA] Inc. Recurrent Energy	108	3.252	11	0.893	5
3	SunEdison [US] (in insolvency)	122	2.954	10	0.432	13
4	State Power Investment Corporation [CN]	57	2.925	4	0.303	21
5	ENEL Green Power [IT] Inc. Endesa	38	2.661	9	1.486	1
6	NextEra Energy [US] Inc. Florida Power & Light	47	2.531	21	1.202	2
7	Adani [IN] Inc. Parampujya Solar	31	2.178	3	0.303	20
8	ACME Solar [IN]	60	2.076	9	0.802	6
9	Engie [FR] Inc. SolaireDirect, CNR & others	83	1.758	18	0.737	7
10	Shunfeng [CN] Inc. S.A.G. Solarstrom [DE]	9	1.532	1	0.410	14
11	Cypress Creek Renewables [US] Inc. FLS Energy	130	1.401	31	0.346	17
12	SunPower Corporation [US]	41	1.275	5	0.358	16
13	JinkoSolar [CN]	16	1.205	6	0.901	4
14	Tata Power [IN] Inc. Welspun	33	1.202	3	0.199	23
15	China Three Gorges New Energy [CN]	10	1.199	3	0.943	3
16	Abengoa Solar [ES] Inc. Abener	17	1.179	0	0.000	
17	Hareon Solar [CN]	12	1.112	2	0.486	11
18	Greenko Energy Holdings [IN]	3	1.082	1	0.082	
19	China Singyes [CN]	3	1.040	3	0.466	12
20	Scatec Solar [NO]	26	1.031	14	0.587	9
21	EDF Energies Nouvelles [FR] (part of EDF)	46	1.014	5	0.388	15
22	GCL-Poly Energy Holdings [HK]	26	1.013	2	0.066	
23	Enerparc [DE]	145	0.999	42	0.247	22
24	Sempra Energy [US]	9	0.989	4	0.314	19
25	juwi AG [DE]	86	0.957	4	0.028	
26	Neoen [FR]	28	0.924	16	0.512	10
27	AES Corporation [US]	46	0.921	11	0.318	18

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Top utility-scale solar project developers with at least 0.9 GW_{ac} cumulative commissioned capacity

Top of the table for recent installations is ENEL Green Power, the renewables arm of Italian energy conglomerate ENEL, thanks in particular to new projects commissioned in South and Central America. In second and third places are NextEra Energy, owners of Florida Power and Light, and the renewables division of energy giant China Three Gorges Corporation. Another prominent riser is the French energy multinational Engie (formerly GDF Suez). Naturally these utility companies tend to retain ownership of most of the renewable projects they develop.



Most other companies on the list are traditional developers, who sell the projects when they are built; or independent power producers, who own and operate renewable energy portfolios.

Of the six solar manufacturers on the list, First Solar is tending to scale back its downstream activities, but the others – most notably Canadian Solar through its Recurrent Energy subsidiary – use new project development as a market for their output. The former developer SunEdison continues to feature as other complete the projects it initiated before its collapse.

India's Acme Solar is amongst the highest climbers in the owner's list thanks to its new developments in 2018/19. Similarly, international IPP's such as Scatec Solar, Enerparc and Neoen are progressing thanks to their project development activities.

While most of the leading plant owners also develop projects, a few acquire most of their capacity from others. This applies, for example to US-based Global Infrastructure Partners, now at number 3 in the list and the UK's Actis, a major climber to number 22.

Wiki-Solar's lists are built from the bottom up – totalling the capacity of utility-scale solar projects on its database. Founder Philip Wolfe points out that “this means the contributions of some – both on and off the list – are understated, because not all partners in all projects are known, though many leading companies keep us informed”. It should be noted that these lists total only commissioned projects for which the companies acted as project developers or owners. Many of those listed also act as EPC contractors or in other roles and may 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/191023_Leading_utility-solar_project_developers.pdf
- [2] Further details of the top project developers are available here:
<http://wiki-solar.org/company/developer/index.html>
- [3] Further details of the top plant owners are available here:
<http://wiki-solar.org/company/owner/index.html>
The list of owners with over ¼ GW of capacity is appended overleaf.
- [4] 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>.
- [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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Top utility-scale plant owners with at least 750 MW of operating capacity

Rank	Plant owner / IPP	Cumulative to date		Change since end 2017		
		Plants	GWac	Plants	GWac	Rank
1	NextEra Energy [US]	45	2.885	12	0.704	3
2	State Power Investment Corporation [CN]	51	2.708	2	0.200	19
3	Global Infrastructure Partners [US]	40	2.258	8	0.817	1
4	ENEL Green Power [IT]	33	1.974	4	0.603	5
5	Panda Green Energy [CN]	32	1.948			10
6	Adani [IN]	30	1.927	2	0.103	23
7	ACME Solar [IN]	35	1.600	6	0.762	2
8	Southern Power [US]	25	1.495	0	0.020	
9	AES Corporation [US]	65	1.437	9	0.436	8
10	Électricité de France [FR]	59	1.354	6	0.361	11
11	Consolidated Edison Development [US]	25	1.256	2	0.300	12
12	Dominion Energy [US]	42	1.154	1	0.007	
13	Enerparc [DE]	157	1.119	44	0.273	13
14	Lightsource BP [GB] (part owned by BP)	148	1.096	3	0.078	
15	Canadian Solar [CA]	29	1.072	7	0.273	14
16	Cypress Creek Renewables [US]	137	0.992	18	0.135	21
17	Sempra Energy [US]	14	0.991	2	0.150	20
18	Acciona Energía [ES]	16	0.966	3	0.420	9
19	Duke Energy [US]	51	0.943	4	0.266	15
20	GCL-Poly Energy Holdings [HK]	26	0.893	4	0.030	
21	Greenko Energy Holdings [IN]	11	0.862	1	0.082	
22	Actis [GB]	13	0.839	5	0.465	7
23	Berkshire Hathaway Energy [US]	6	0.833			
24	Neoen [FR]	31	0.799	18	0.478	6
25	SunEdison [US] (in insolvency)	44	0.795	2	0.225	17
26	Tata Power [IN]	26	0.783	1	0.050	
27	Foresight Group [GB]	71	0.778	5	0.113	22
28	D. E. Shaw Renewable Investments [US]	16	0.775	3	0.225	18
29	Scatec Solar [NO]	26	0.775	15	0.607	4
30	Renew Solar Power [IN]	18	0.772	1	0.100	24
31	Azure Power [IN]	25	0.763	2	0.250	16
32	National Thermal Power Corporation [IN]	14	0.750	0	0.000	

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