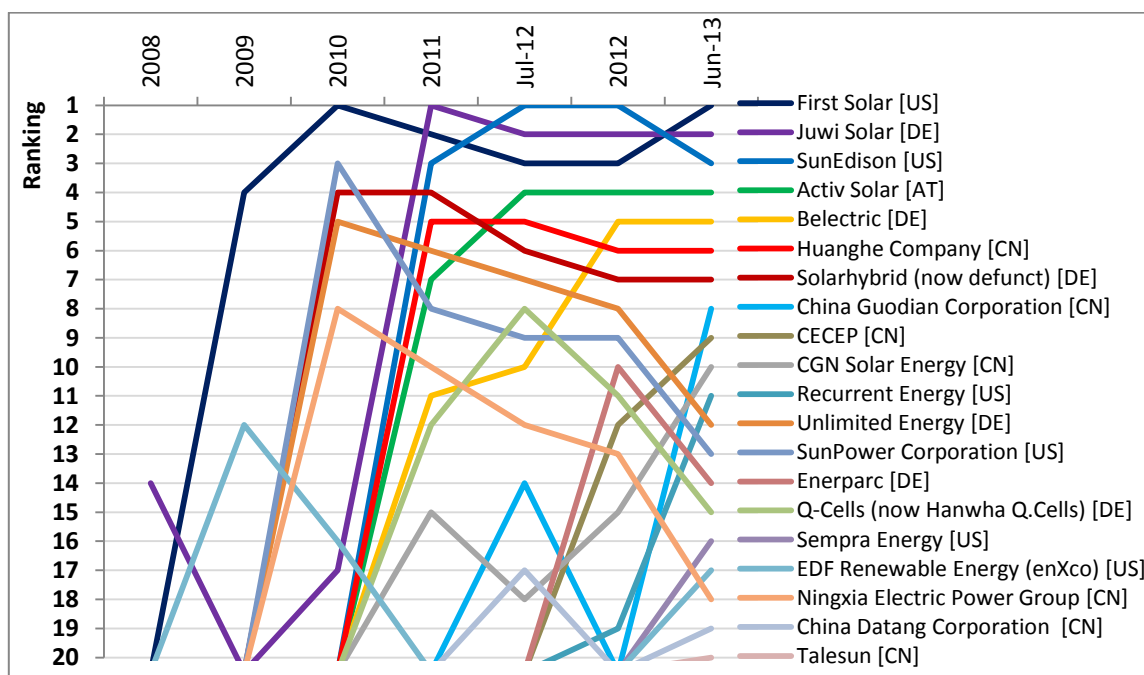


## US, European developers hold lead, as Chinese advance

American and European companies still lead the latest ranking of utility-scale solar project developers, published by industry experts Wiki-Solar<sup>[1]</sup> today. The greatest change in the last year, however, is the emergence of Chinese developers, both in their home market and internationally.

US module producer First Solar again leads the list, with all of the top five players from North America and Europe. But seven of the top 20 project developers now come from China, as profiled in a report by Wiki-Solar earlier this month<sup>[2]</sup>.

The project developer is the party which initiates a new solar power project, finds the finance, and appoints an EPC contractor to build the plant. Some developers then stay involved; others sell out and move on. The risers and fallers amongst the top 20<sup>[3,4]</sup> project developers are illustrated here:



Ranking trends of the top 20 developers on the Wiki-Solar database<sup>[1,4,6]</sup>

“Not all of these Chinese participants are newcomers”, says market expert Philip Wolfe; “three of the seven have been on the list since 2011. But China’s burst through the 3GW milestone<sup>[5]</sup> has brought many new players into the market”.

“Participation in ‘downstream’ project development and EPC activities seems to have been a smart move for leading solar module manufacturers like First Solar and SunPower”, says Wolfe. “They have probably been able to keep production lines running, without entering the solar module ‘trade war’, which is hopefully now coming to an end.”

Wiki-Solar emphasises that this list is based on operating solar power stations, and features solely the project development role. In coming weeks it intends to publish further lists of participants elsewhere in the supply chain; including EPC contractors, IPPs and equipment suppliers.

E N D S

Continued/-



### **Notes for editors:**

- [1] Wiki-Solar defines 'utility-scale' as projects of 10MW and over.
- [2] The report on utility-scale solar in China is available from:  
<http://www.wiki-solar.org/service/report.html>
- [3] The full list, with the cumulative capacity of projects over 10MW which each has developed, is available at: <http://www.wiki-solar.org/company/developer.html>
- [4] Wiki-Solar had 14.8GW of operating utility-scale plants (of 10 MW and over) on its database, when this list was compiled in June. Of that capacity, developers are listed against 84%; of which the top-20 list accounts for 47%.
- [5] China broke the 3GW milestone for installed capacity of utility-scale solar projects in the first half of 2013. See: [http://www.wiki-solar.org/publications/130711\\_China\\_passes\\_3GW\\_utility-scale\\_solar.pdf](http://www.wiki-solar.org/publications/130711_China_passes_3GW_utility-scale_solar.pdf)
- [6] The statistics for utility-scale solar projects are collated by wiki-solar.org, and shown on an interactive global map at: <http://www.wiki-solar.org/map.html>. Wiki-Solar's database of 55GW of projects connected and in development includes 610 operational solar generating stations of 10MW+ (some 1,150 at 5MW+). A further 450 sites (550 at 5MW+) are under development, but not included in the statistics until they become operational.

Though many owners, developers and contractors have validated Wiki-Solar's data, some is dependent on other published sources. Some totals may be understated due to publication delays. Wiki-Solar updates its records continuously, with input from industry participants.

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](#) in October.

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