

Asian and US constructors tighten their grip on global solar

Chinese, Indian and American companies strengthened their domination of Wiki-Solar's league table of top EPC contractors published today. The top 35 constructors still include 16 European companies, but their share of the global market is slipping.

Retiring Wiki-Solar founder Philip Wolfe attributes this to the size and quantity of projects in each market. "China, India and the US now regularly build plants at the gigawatt scale", he says, referring to massive developments in Gujarat, Ningxia, Texas, Rajasthan, and Inner Mongolia. "The average plant size in India is over 80MW; while in the USA it has risen from 15MW a decade ago to 90 today". In China new installations now average about 150MW, while the equivalent in Europe is under 30.

The big climbers in the contractors list [see overleaf] have benefitted from these larger projects and high growth in their primary markets. The top three remain unchanged, while Indian contractors Larsen & Toubro and Sterling & Wilson join them at numbers 4+5. Compatriots Acme and Tata have also climbed to #10 and #13 respectively. Chinese EPCs such as China Power Construction and PowerChina are also rising, and their position is probably understated owing to the scarcity of data from China.

Amongst European contractors, Gransolar is climbing thanks to a buoyant Spanish market and Eiffage is holding on at #3. Others continue to expand their portfolios, but find it harder to match growth in the three major markets.

Together the 35 contractors in this table have installed cumulatively over 118MW_{ac} of utility-scale solar capacity, of which 20% has been commissioned since the start of 2024. Note that Wiki-Solar measures capacity in MW_{ac} delivered to the grid, including only projects over 4MW_{ac}. The installed capacities would be roughly 25% higher if measured by the DC solar array output in MW_p.

Most, but not all, of the leading O&M contractors – which Wiki-Solar lists separately [page 3] – are companies in this top constructors table.

TEXT ENDS

Notes for readers:

- [1] The lists of top EPC and O&M contractors are included on the following pages. These lists are published half-yearly, and this will continue [at least until the end of 2025](#).
- [2] Wiki-Solar defines 'utility-scale solar' as 4 MW_{AC} and above ($\approx 5\text{MW}_P$ for PV; \approx electricity for 1,500 households in Europe) see: <http://wiki-solar.org/data/glossary/utility-scale.html>.
- [3] Wiki-Solar is the leading authority on utility-scale solar with a database covering over 25,000 utility-scale solar projects, of which about three-quarters are operational. All figures in this release are based on the AC export rating of operational plants. Projects under development are excluded until they have been commissioned.

For more information:

+44 (0)7971 786417

philip@wiki-solar.org





Rank	EPC contractor [a]	[c]	Operating		Change since 01-Jan-24			
			Plants	GWac [b]	Plants	GWac [b]	Rank	
1	SOLV Energy [US] (Inc Swinerton Renewable Energy)	Map	222	14.6	20	3.7	1	
2	McCarthy Building [US]	Map	83	7.8	11	2.3	3	
3	Eiffage Energie Systèmes [FR]	Map	141	5.6	24	0.8	10	
4	Larsen & Toubro [IN]	Map	58	4.9	4	1.9	4	
5	Sterling & Wilson Renewable Energy [IN] (part of SP India)	Map	75	4.6	3	1.3	8	
6	First Solar [US]	Map	57	4.3	0	0.0		
7	Belectric [DE] (now part of Elevion)	Map	242	4.1	33	0.7	12	
8	Mortenson Construction [US]		30	4.0	2	0.6	14	
9	Equans (division of Bouygues) [FR] (Inc Fabricom)	Map	253	3.9	25	0.7	11	
10	ACME Solar [IN]	Map	49	3.5	1	1.2	9	
11	juwi AG [DE] (Inc JSI Construction)	Map	169	3.4	6	0.3	22	
12	Enerparc [DE]	Map	319	3.3	11	0.2	30	
13	Tata Power [IN]	Map	27	3.2	5	1.5	6	
14	Abengoa [ES] (now part of Cox Energy) (Inc Abener Energia)	Map	38	3.1	2	0.1	42	
15	China Power Construction [CN]		3	3.0	1	2.9	2	
16	Gransolar [ES]		44	3.0	7	1.3	7	
17	Vinci Energies [FR] (Inc Semi Group, Omexom and others)		55	2.9	1	0.0	45	
18	BayWa r.e. [DE] (Inc GroenLeven)	Map	121	2.7	4	0.2	35	
19	China Machinery Engineering Corporation [CN]		5	2.7	1	0.1	41	
20	Mahindra [IN]		43	2.5	0	0.0		
21	Elecnor [ES]	Map	45	2.4	1	0.0	44	
22	Signal Energy [US]		14	2.4	0	0.0		
23	Acciona Energía [ES]	Map	29	2.4	3	0.5	16	
24	PowerChina [CN]		16	2.4	5	0.5	17	
25	Rosendin Electric [US]		19	2.4	1	0.4	21	
26	Mytilineos [GR] (Inc Metka-Egn)	Map	94	2.4	1	0.1	43	
27	China Energy Engineering [CN]		15	2.3	8	1.7	5	
28	Blattner Energy [US]		18	2.3	2	0.4	19	
29	Goldbeck Solar [DE]	Map	122	2.1	10	0.3	23	
30	Elmya [ES]	Map	62	2.0	5	0.2	27	
31	GreenCells [DE]		127	1.9	15	0.2	28	
32	SPIC (State Power Investment) [CN] (Inc Shanghai Electric Power Japan, Shanghai Electric)	Map	4	1.6	0	0.0		
33	TSK Group [ES] (Inc TSK Electronica y Electricidad)		21	1.6	1	0.1	39	
34	Scatec ASA [NO]	Map	34	1.5	3	0.2	29	
35	Grupotec [ES]	Map	82	1.5	7	0.3	26	
fTopPC_5111			Totals listed above:		2,736	118.4	223	24.6

[a] These top 35 EPC contractors account for 118-GWac, ~15% of the world total.

[b] GWac total for projects over 4MWac; GWp figures typically ~25% higher

[c] Hyperlinks to Wiki-Solar map of company's projects

[d] Wiki-Solar database holds EPC contractors for ~25% of projects so there will be some omissions from this list and figures for others may be understated by a factor of 4 on average



Wiki-Solar

Top O&M contractors for utility-scale (4-MWac+) solar projects at Q1-2025

Rank	O&M contractor [a]	[c]	Operating		Change since 01-Jan-24		
			Plants	GWac [b]	Plants	GWac [b]	Rank
1	SOLV Energy [US]	Map	133	13.7	25	4.5	1
2	First Solar [US]	Map	59	4.6	0	0.0	
3	Eiffage Energie Systèmes [FR]	Map	96	3.9	13	0.6	4
4	Equans (division of Bouygues) [FR]	Map	230	3.8	23	0.7	3
5	juwi AG [DE]	Map	157	3.7	7	0.3	8
6	McCarthy Building [US]	Map	18	3.2	4	1.1	2
7	Enerparc [DE]	Map	265	2.8	1	0.0	19
8	BayWa r.e. [DE]	Map	116	2.5	4	0.2	11
9	Belectric [DE] (now part of Elevion)	Map	134	2.4	6	0.2	9
10	Elecnor [ES]	Map	35	2.2	1	0.0	20
11	Cypress Creek Renewables [US] (acquired by EQT Infrastructure [SE])	Map	147	1.8	1	0.0	23
12	Scatec ASA [NO]	Map	28	1.7	2	0.2	12
13	Canadian Solar [CA] (Inc Recurrent Energy)	Map	26	1.7	1	0.1	14
14	Metka-Egn [GR] (part owned by Mytilineos with Egnatia Energy)	Map	79	1.7	1	0.1	16
15	SunEdison [US] (now defunct)	Map	56	1.3	0	0.0	
16	Abengoa [ES] (now part of Cox Energy)	Map	13	1.2	0	0.0	
17	Grupotec [ES]	Map	67	1.1	5	0.1	13
18	Exus Renewables [ES]		4	0.9	0	0.0	
19	Sterling & Wilson Renewable Energy [IN] (part of SP India)	Map	7	0.8	0	0.0	
20	China Datang Corporation [CN]	Map	11	0.7	0	0.0	
21	Larsen & Toubro [IN]	Map	23	0.7	0	0.0	
22	Focus Energia [BR]		1	0.7	0	0.0	
23	CGN Solar Energy Development [CN] (part of CGN)	Map	8	0.7	0	0.0	
24	China Guodian Corporation [CN]		7	0.7	0	0.0	
25	EDF Energies Nouvelles [FR] (part of EDF) (Inc EDF Renewable Energy, groSolar)	Map	36	0.6	0	0.0	
26	Vikram Solar [IN]		7	0.6	0	0.0	
27	Voltaia [FR] (Inc Martifer)	Map	38	0.6	4	0.2	10
28	SPIC (State Power Investment) [CN] (Inc China Power Investment)	Map	5	0.6	0	0.0	
29	ENcome [AT] (now defunct)		19	0.6	0	0.0	
30	IB Vogt Solar [DE]	Map	41	0.5	0	0.0	
31	TBEA (Tebian Electric Apparatus) [CN] (Inc TBEA SunOasis)		8	0.5	0	0.0	
32	Origis Energy [US]		1	0.5	0	0.0	

fTopPC_5121

Totals listed above: 1,875 62.8 98 8.2

[a] These top 32 O&M contractors account for 63-GWac, ~8% of the world total.

[b] GWac total for projects over 4MWac; GWp figures typically ~25% higher

[c] Hyperlinks to Wiki-Solar map of company's projects

[d] Wiki-Solar database holds O&M contractors for ~11% of projects so there will be some omissions from this list and figures for others may be understated by a factor of 8.7 on average