

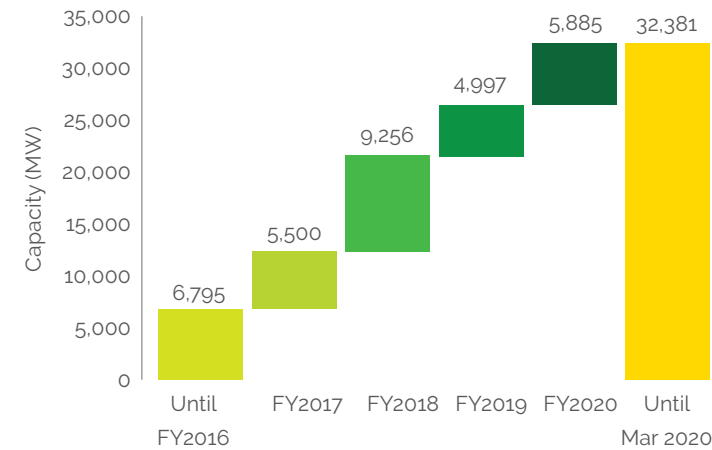
ANNUAL INDIA SOLAR REPORT CARD

FY2020

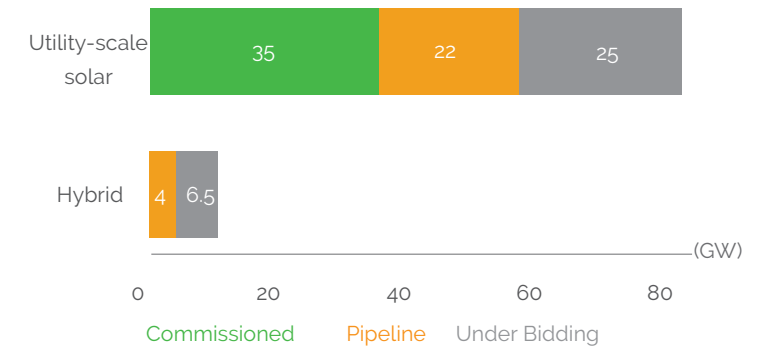
(Apr 2019 to Mar 2020)

SOLAR INSTALLATIONS INDIA

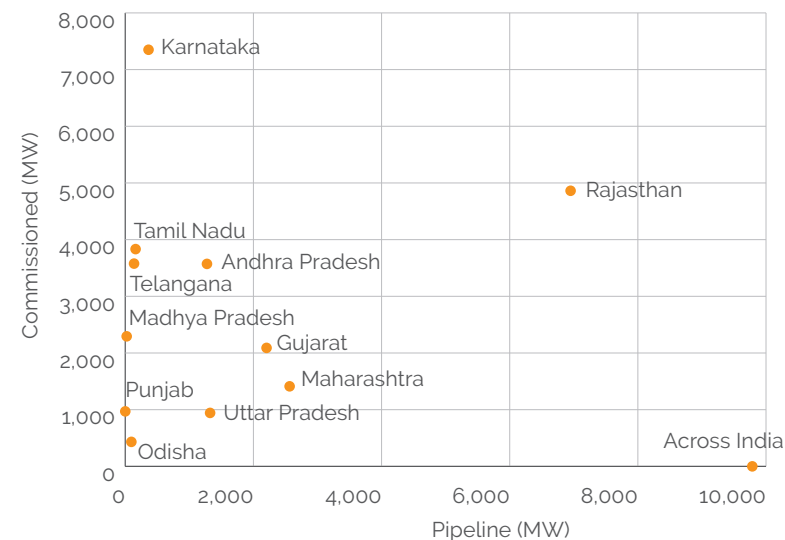
Annual Solar Installations (MW)



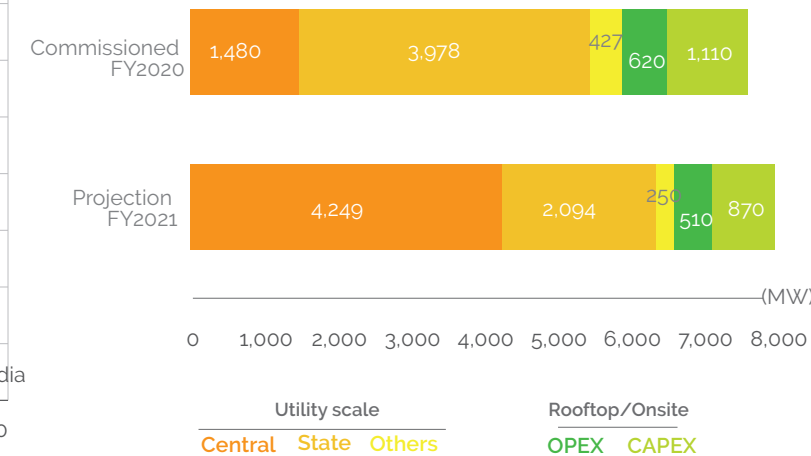
Cumulative Installations (GW), as of Mar 31, 2020



State wise cumulative installations (MW)



Annual Installations (MW)



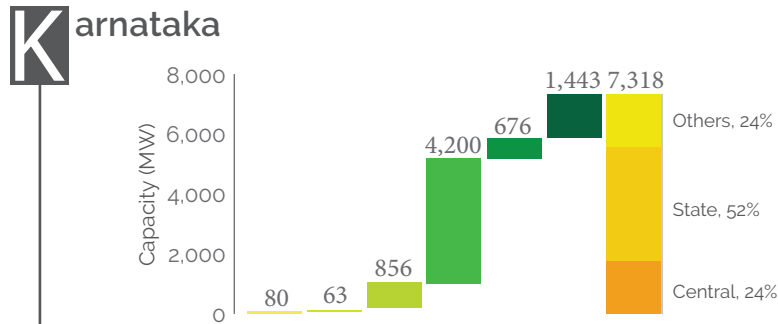
Note:

- State wise installation trends are for utility scale solar projects above 1 MW only. State wise rooftop solar projects not available
- Projects are split between Central /State based on tendering authority that allots projects. 'Others' include third party/open access projects.
- Project pipeline includes projects allotted to developers under various central and state tenders but not yet commissioned.
- Rooftop solar includes all installations on open ground spaces, roof, parking lot or any other area within the premises.
- Rooftop/ Onsite solar market size is calculated basis module and inverter shipment/ supply data for India market from April 19 till Mar 20 period
- All installation capacity numbers mentioned in this report are AC capacity numbers unless otherwise mentioned.

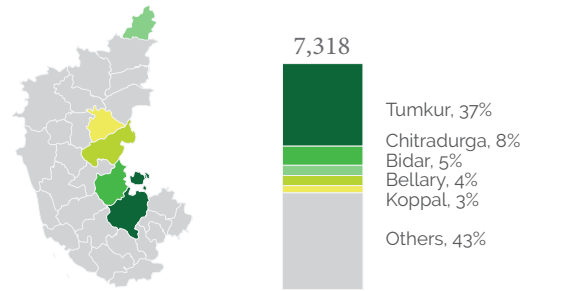


STATE PROFILES

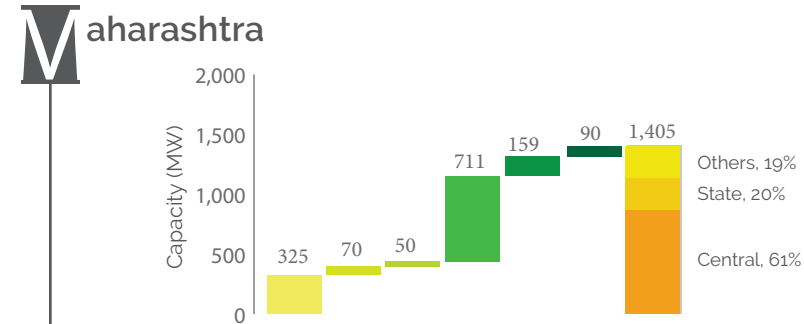
Installation Trends (MW)



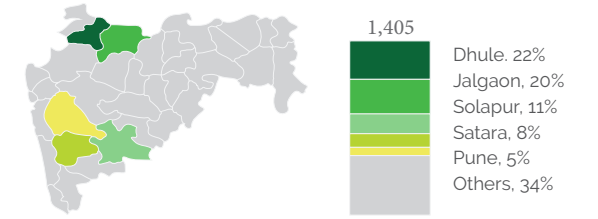
State-district wise installations (MW)



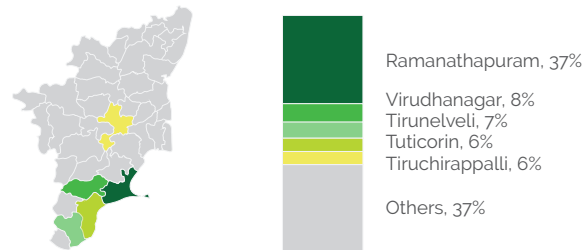
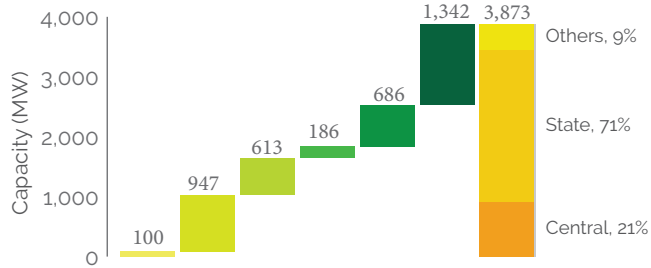
Installation Trends (MW)



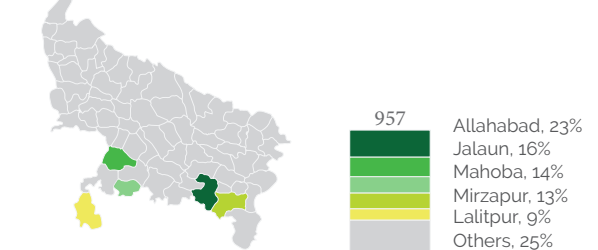
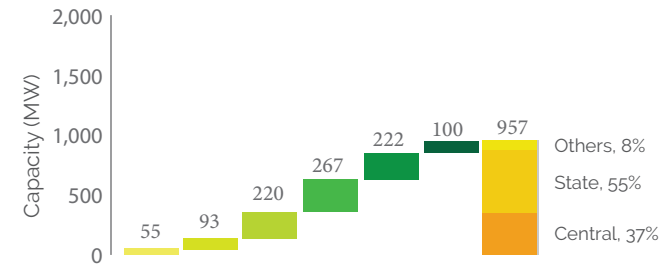
State-district wise installations (MW)



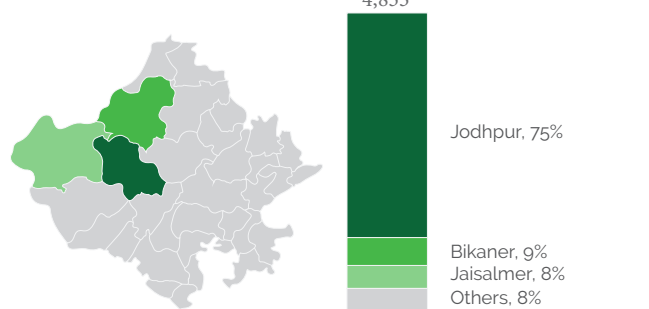
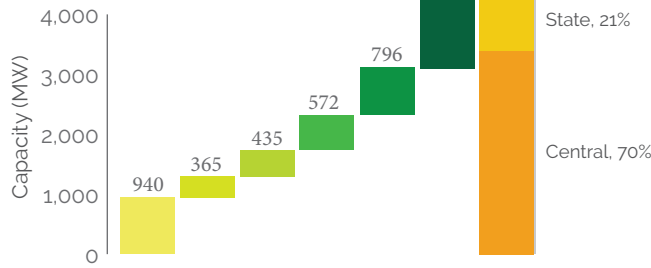
Tamil Nadu



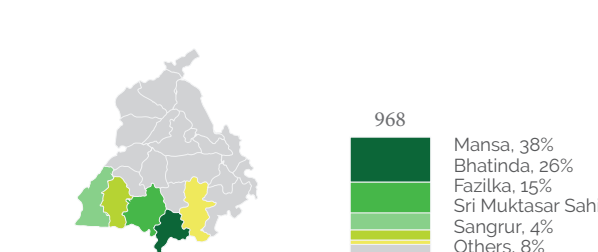
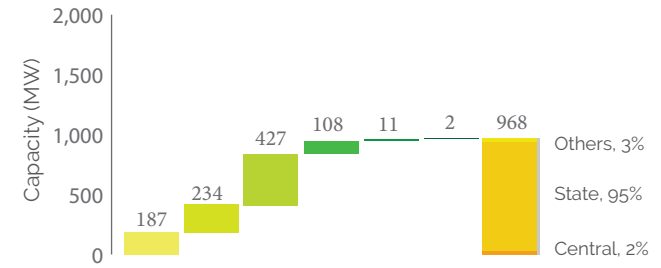
Uttar Pradesh



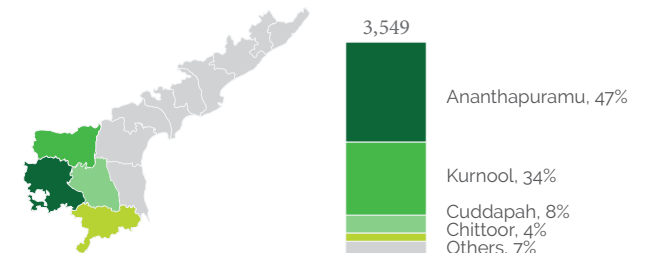
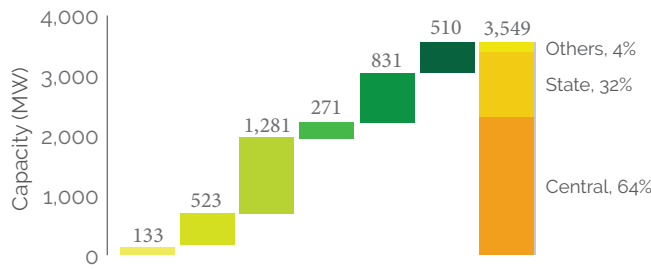
Rajasthan



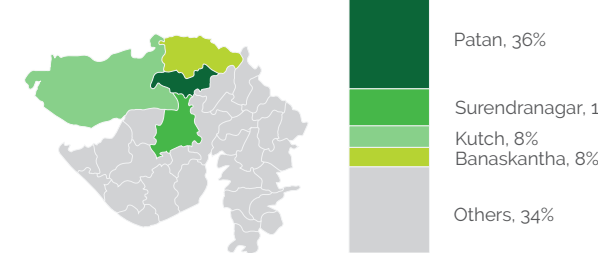
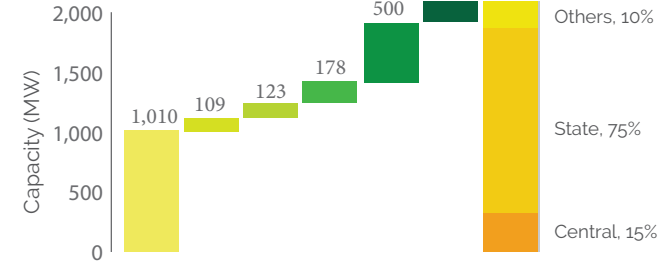
Punjab



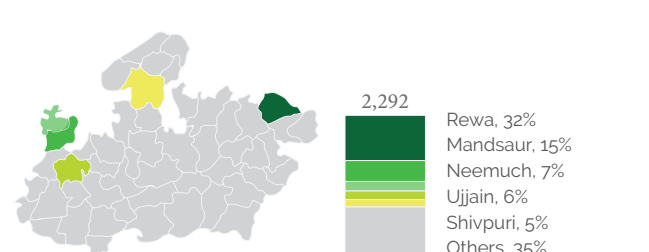
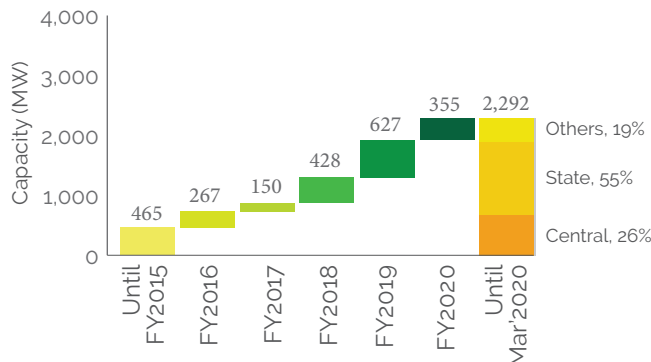
Andhra Pradesh



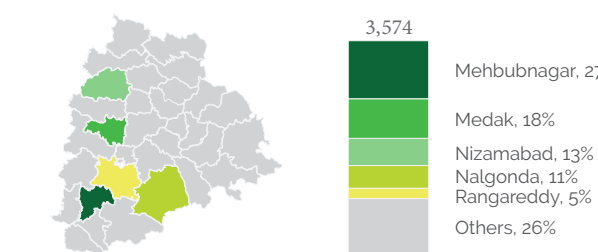
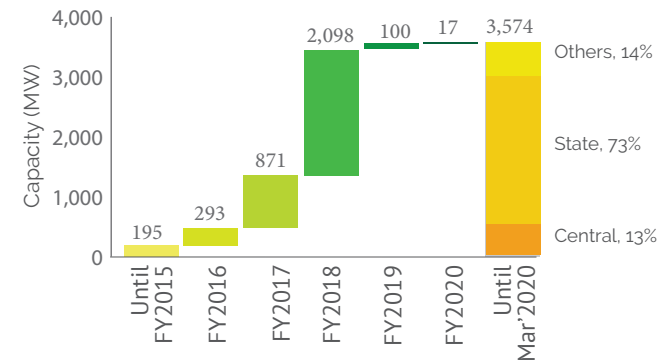
Gujarat



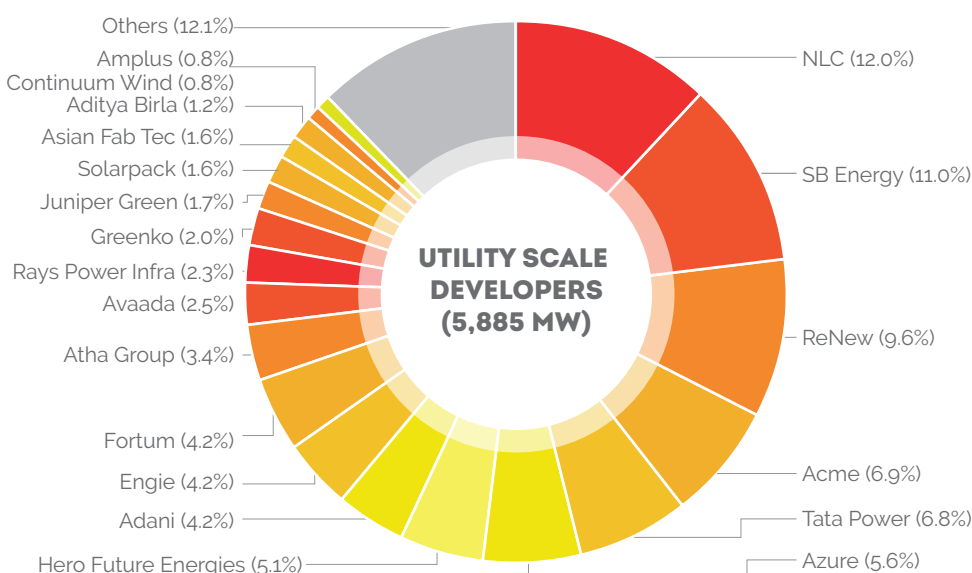
Madhya Pradesh



Telangana

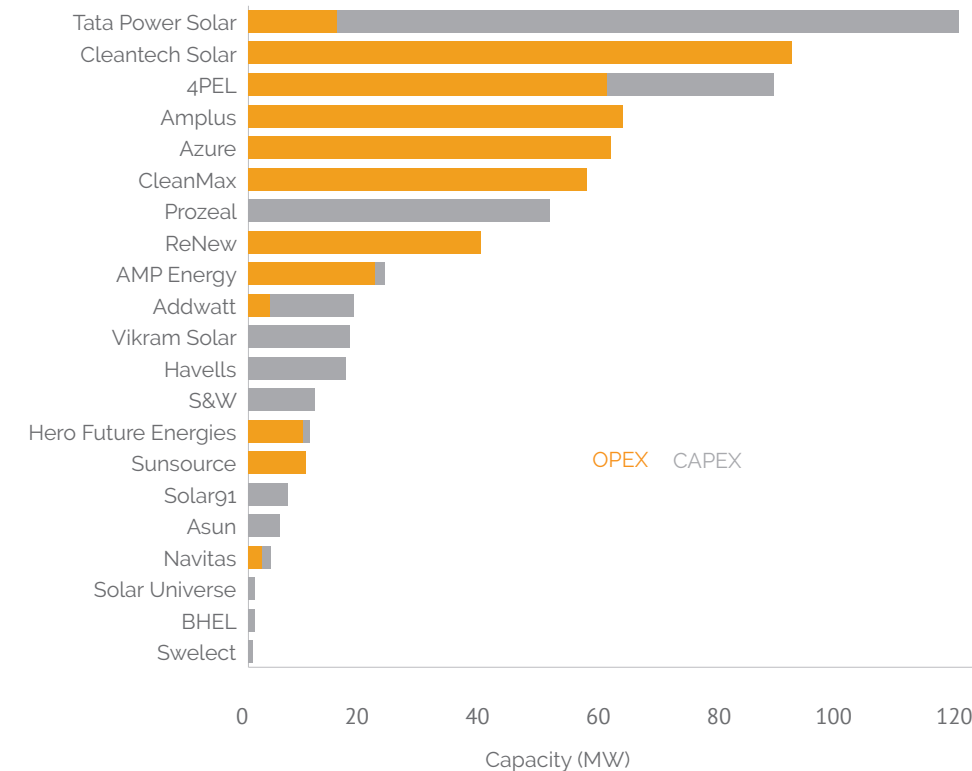


DEVELOPERS



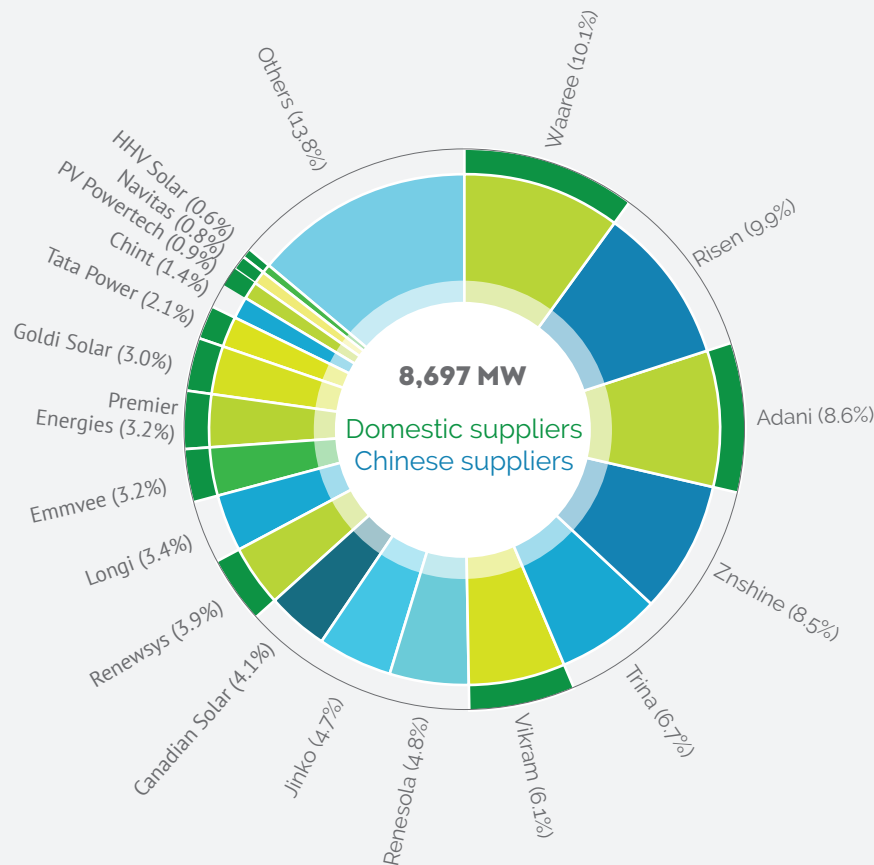
Note:
Project Developers are ranked basis their commissioned AC capacity from Apr 2019 - Mar 2020 period.

LEADING ONSITE ROOFTOP SOLAR INSTALLERS FY2020



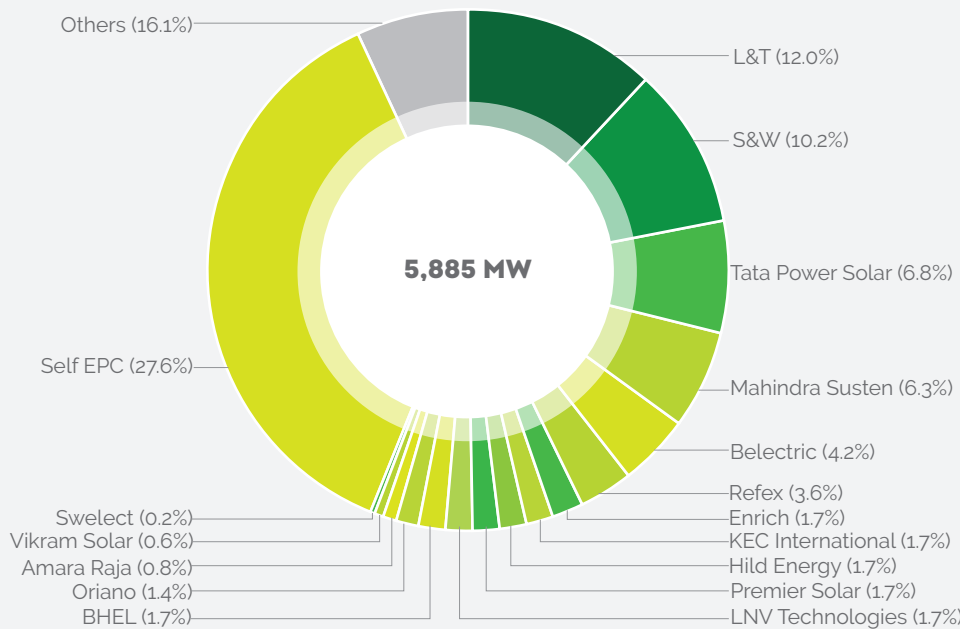
Note:
Players which have shared their rooftop/ onsite solar projects data are shown in this analysis.
Jakson, Mahindra, Thermax, Bosch, ORB Energy, Sunshot, SolarSquare have not shared their data.

MODULES



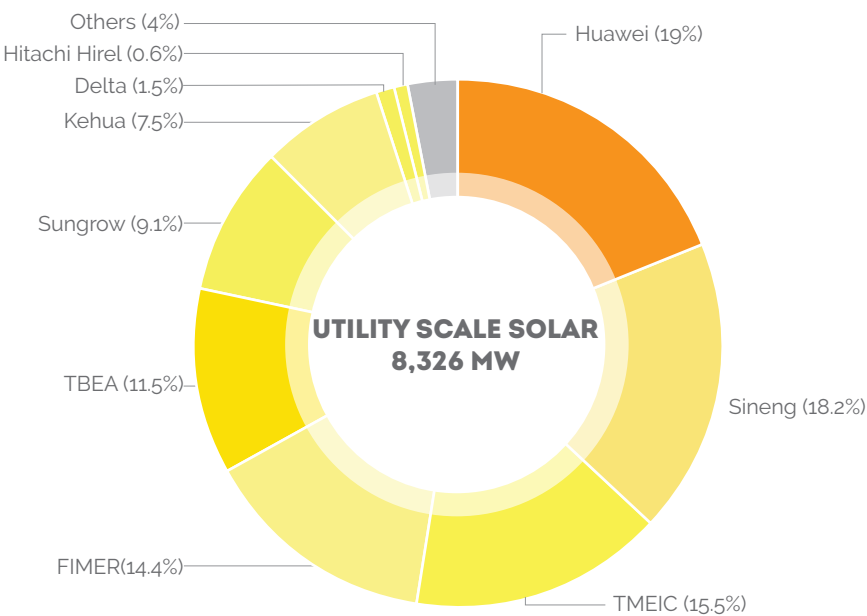
Note:
JA Solar, Csun, Jinergy, Cecep, Suntech, GCL, Alpex have not shared their data. Suppliers are ranked basis their shipment/ supplies in India market from April 2019 till Mar 2020 period
Data includes all module supplies to utility scale, onsite, offgrid as well as solar pumping segment.

UTILITY SCALE EPC

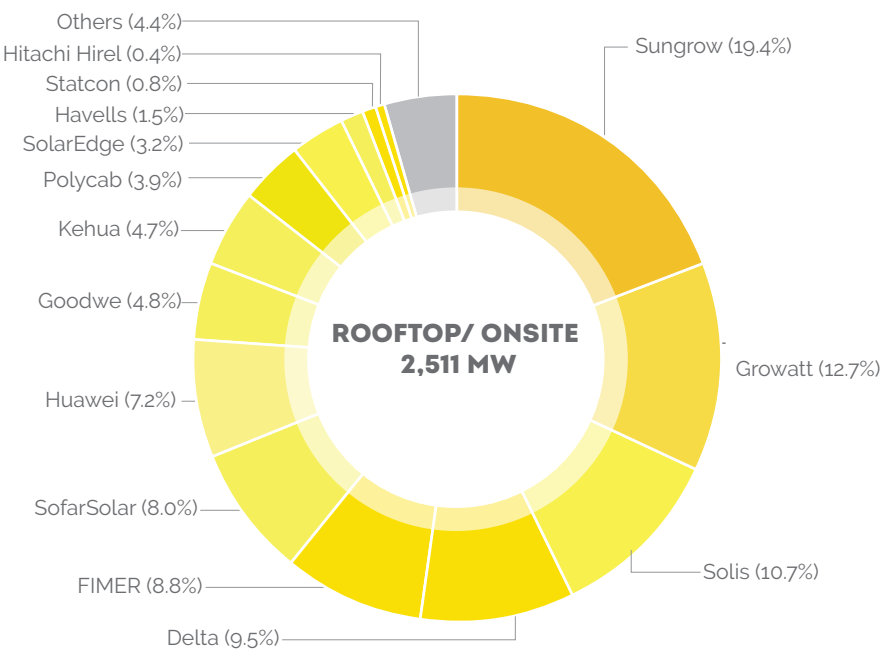


Note:
EPC players are ranked basis commissioned AC capacity of projects in FY2020 (April 2019 till March 2020)
Self EPC projects are those where EPC is done by developers themselves instead of third party EPC contractors

INVERTERS



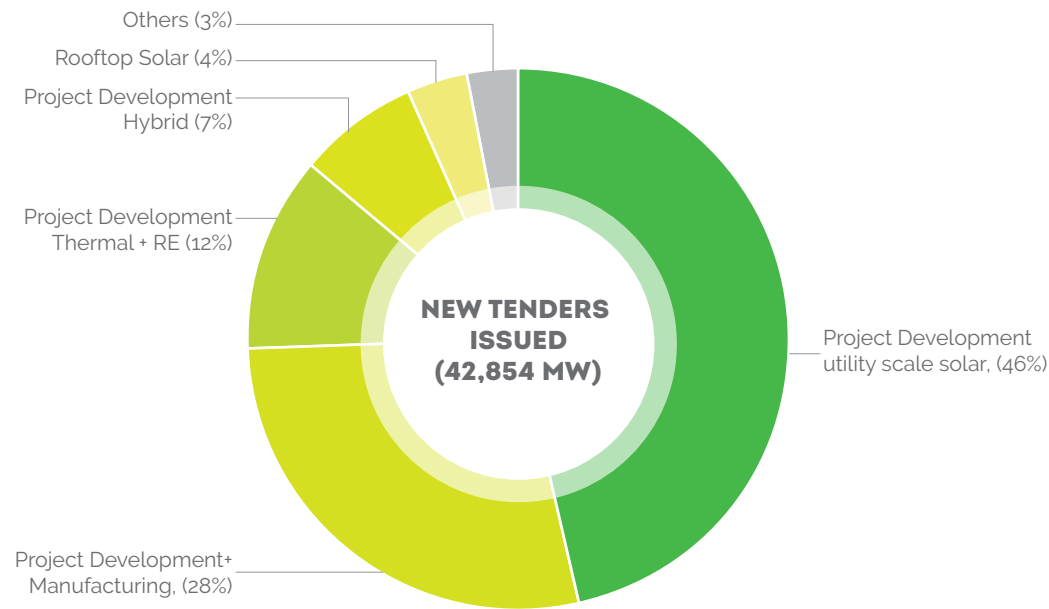
Note:
Inverter suppliers are ranked basis their shipment in utility scale solar market in India from Apr 2019 - Mar 2020
Huawei is the only string inverter supplier in this analysis. SMA, GE, Schneider have not shared their data.



Note:
SMA, Kstar, Ingeteam, Fronius, TBEA and Goodwe have either not shared or confirmed their data
Data in this analysis is the shipment/ sales data of players and not the actual rooftop/onsite solar market size
The analysis includes overlapping data of OEMs who would have supplied inverters to other players as well. Actual split of inverters sold by OEMs under own brand or other players' brand is not available.

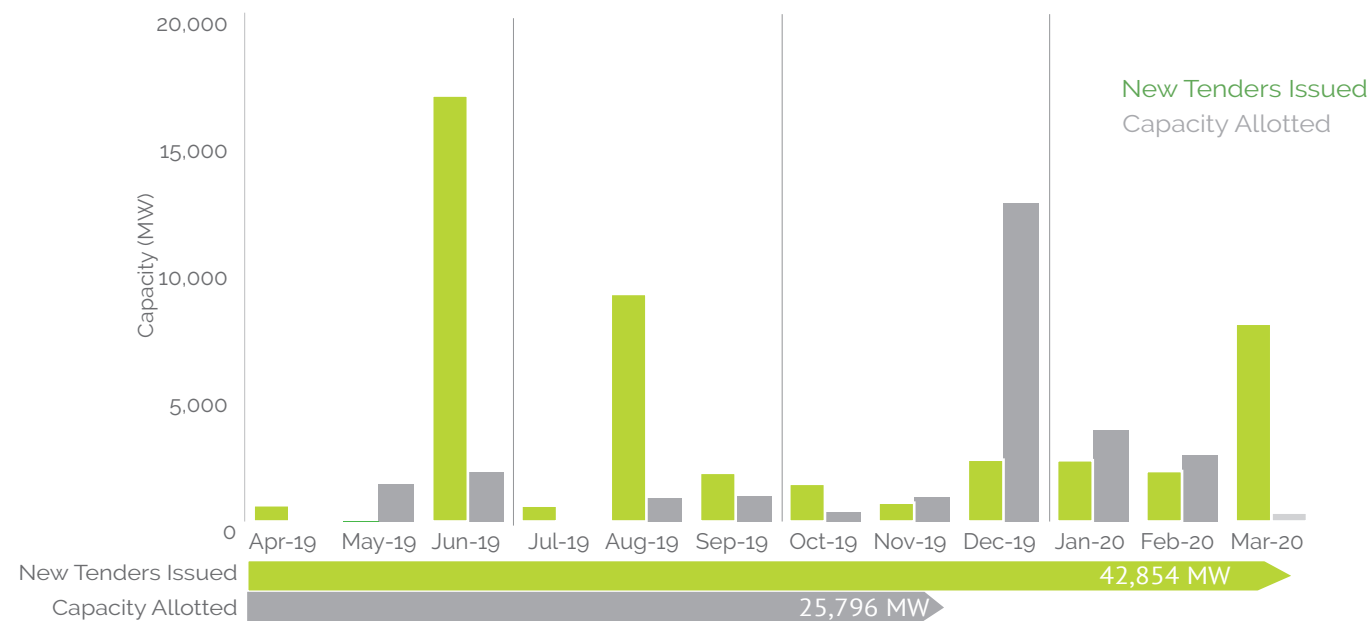


TENDERS



Note:
Project Development +Manufacturing tender was initially issued for 6,000 MW of Project Development. The final allotment was for 12,000 MW of Project Development to Adani and Azure

NEW TENDER ISSUANCE AND CAPACITY ALLOTMENT



Note:
This analysis excludes wind tenders and rooftop solar tenders.



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