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 allotted 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

Karnataka

Tamil Nadu

Rajasthan

Andhra Pradesh

Madhya Pradesh

Maharashtra

Uttar Pradesh

Punjab

Gujarat

Telangana

Installation Trends (MW)

State-district wise installations (MW)
**LEADING ONSITE ROOFTOP SOLAR INSTALLERS FY2020**

- **Tata Power Solar**
- **Clean tech Solar**
- **Suntech Power**
- **Hare Power**
- **Hero Future Energies**
- **Solar Universe**
- **BHEL**
- **Srei**

**Note:**
Players which have shared their rooftop/onsite solar projects data are shown in this analysis. Jaison, Mahindra, Themen, Bosch, OES Energy, Sunshot, SolarSquare have not shared their data.

**UTILITY SCALE EPC**

- **Self EPC (24.8%)**
- **Tata Power Solar (5.8%)**
- **Mahindra Susten (5.3%)**
- **Swelltech (5.1%)**
- **Vikram Solar (4.8%)**
- **Amarra Raja (4.1%)**
- **Ozone (3.5%)**
- **BHEL (3.1%)**

**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.

**UTILITY SCALE SOLAR**

- **8,697 MW**
- **Chinese suppliers**
- **8,326 MW**
- **Domestic suppliers**

**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.

**MODULES**

- **8,697 MW**
- **Chinese suppliers**
- **8,326 MW**
- **Domestic suppliers**

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

**INVERTERS**

- **8,697 MW**
- **Chinese suppliers**
- **8,326 MW**
- **Domestic suppliers**

**Note:**
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.

**MODULES**

- **8,697 MW**
- **Chinese suppliers**
- **8,326 MW**
- **Domestic suppliers**

**Note:**
Module suppliers are ranked basis their shipment in utility scale solar market from Apr 2019 till Mar 2020 period. Canadian Solar, Longi, Growatt, Sungrow, Huawei, Trina, Vikram, Adani, Risen, Znshine have not shared their data.

**DEVELOPERS**

- **5,885 MW**
- **Self EPC (27.6%)**
- **Others (16.1%)**

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

NEW TENDERS ISSUED (42,854 MW)

NEW TENDER ISSUANCE AND CAPACITY ALLOTMENT

Note:
This analysis excludes wind tenders and rooftop solar 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

New Tenders Issued
Capacity Alotted

20,000
15,000
10,000
5,000
0

Capacity Allotted

New Tenders Issued


Capacity Allotted

25,796 MW

ONLINE DATABASES

Available on Annual Subscription, please contact for online demo.
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