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INDIA SOLAR ROOFTOP MAP 2019^{DEC}

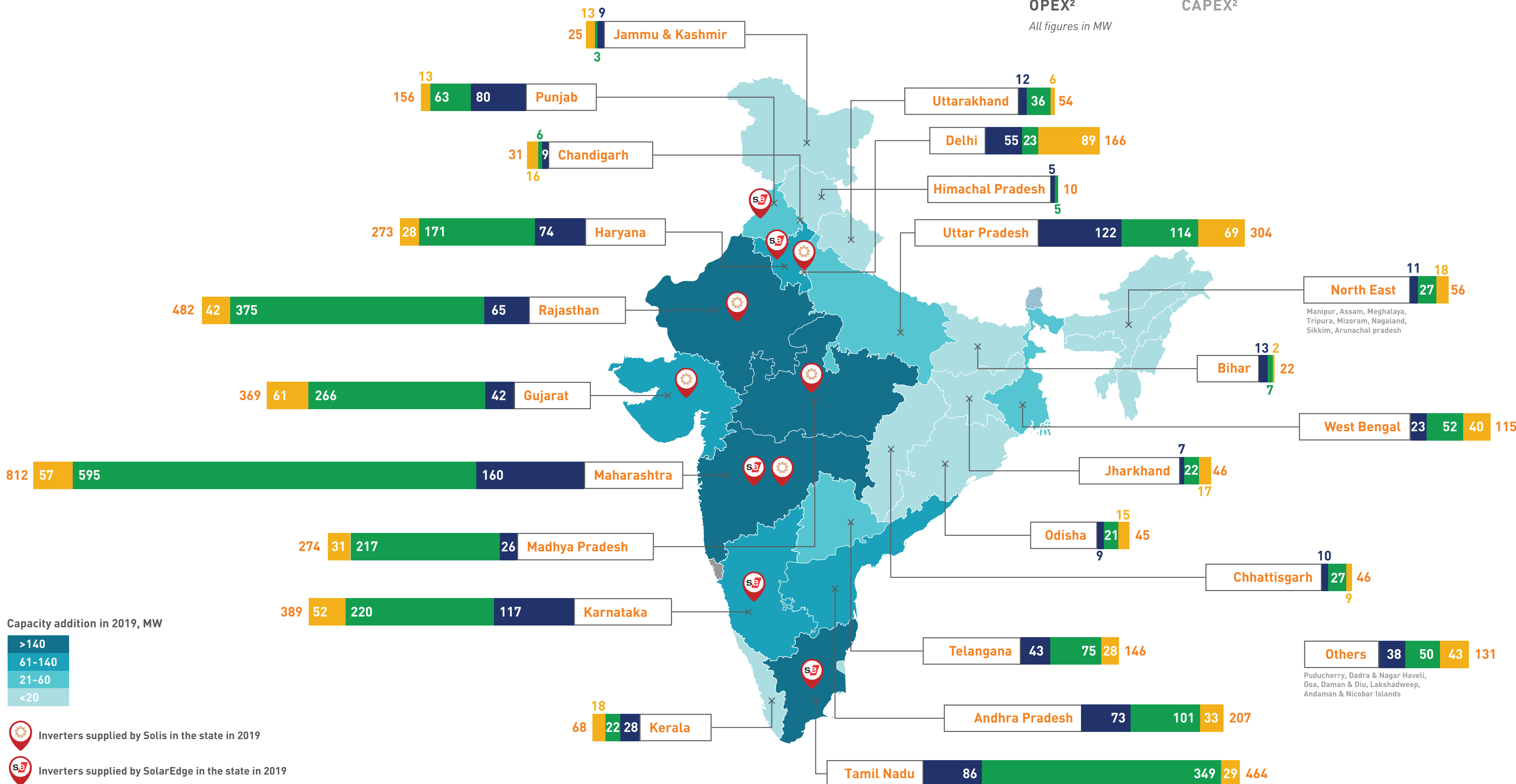
Lead sponsors



Total installed capacity: 5,440 MW^{1,3}
as on 31 December 2019

		Public sector	
1,116	2,848	728	748
Commercial	Industrial	Residential	
1,579	3,861		
OPEX ²	CAPEX ²		

All figures in MW

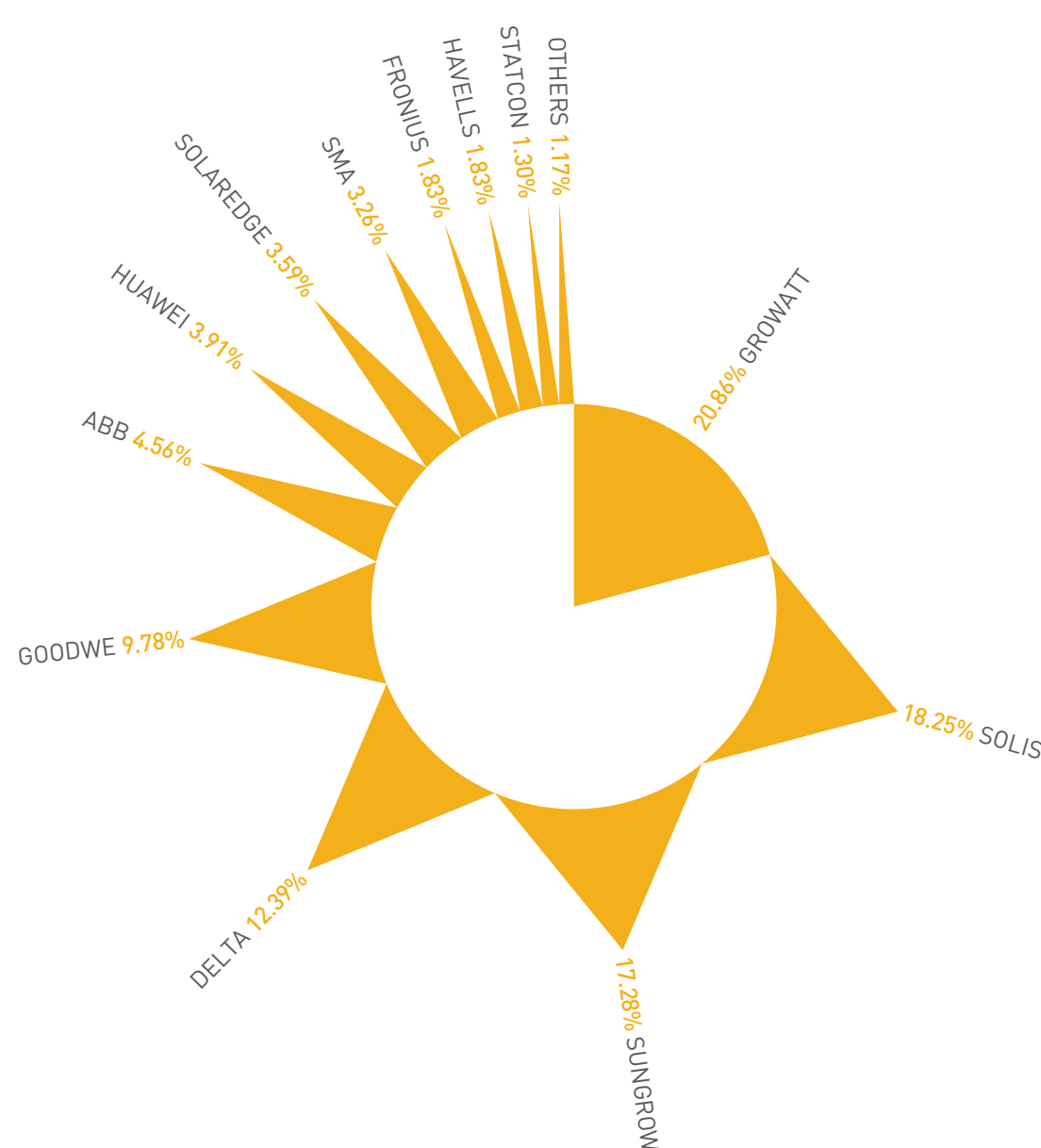


Annual market share¹

Capacity installed in 2019 (1,534 MW)

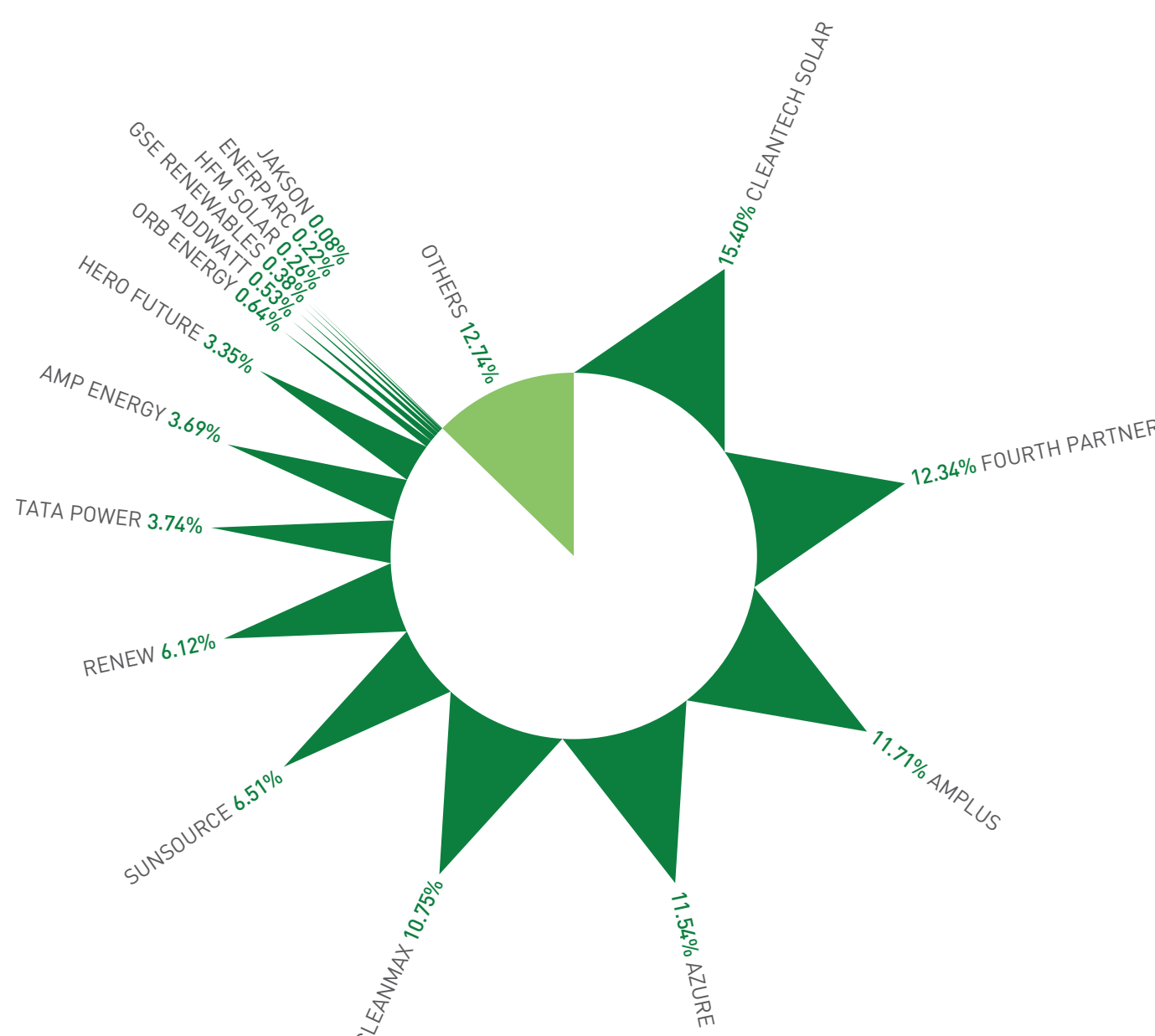
Inverter suppliers

Market size - 1,534 MW



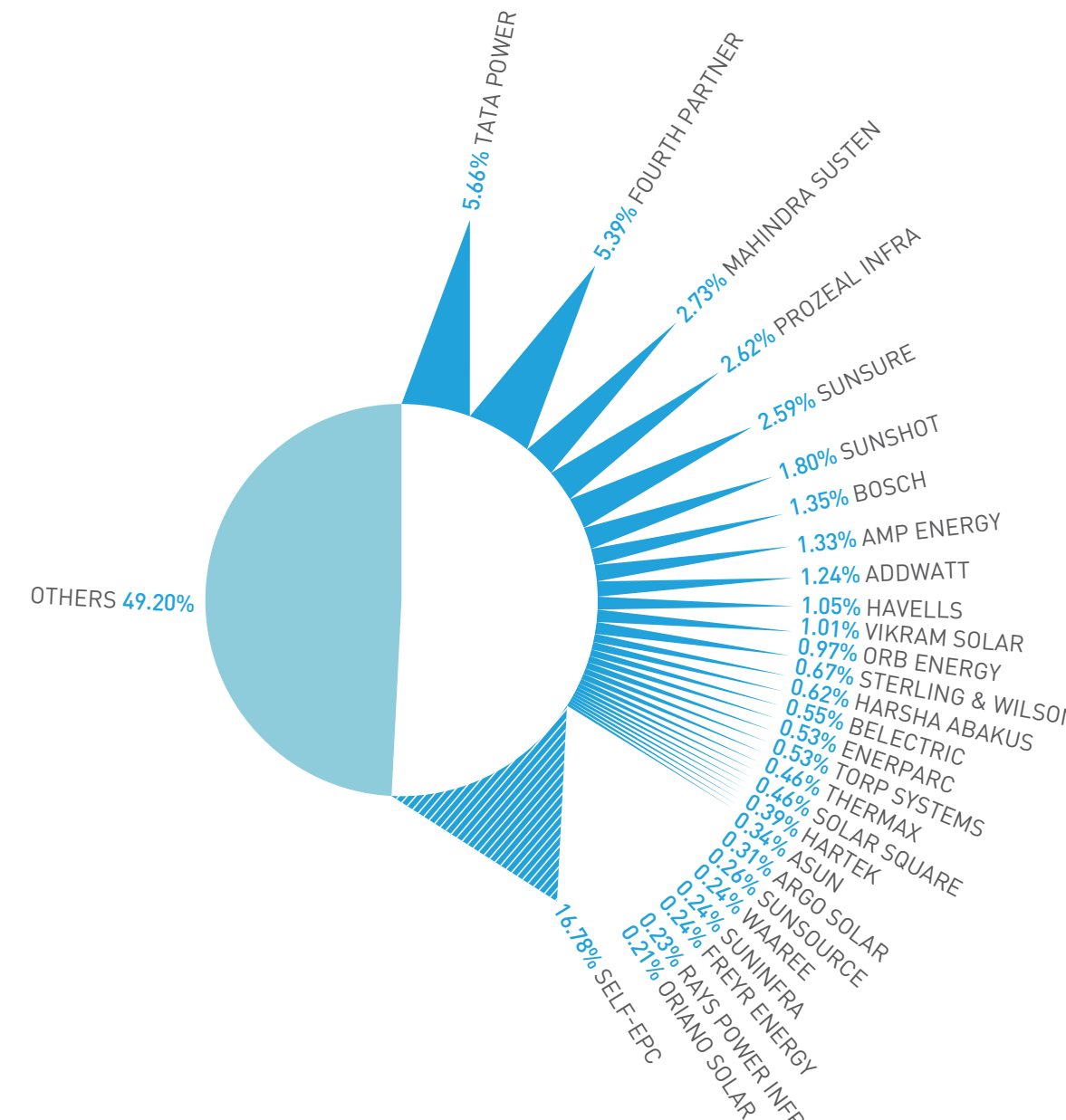
Project developers

Market size - 520 MW



EPC contractors

Market size - 1,534 MW



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15 years experience

PVEL Reliability Test
(Former part of QNV-GL)

DNV-GL validation testing earned top-of-range lifespan projections in the string inverter category

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India Renewables Outlook 2024

Sector overview

Capacity addition

Key sub-sectors

Module manufacturing

Technology and prices

Land availability

Transmission infrastructure

Financing

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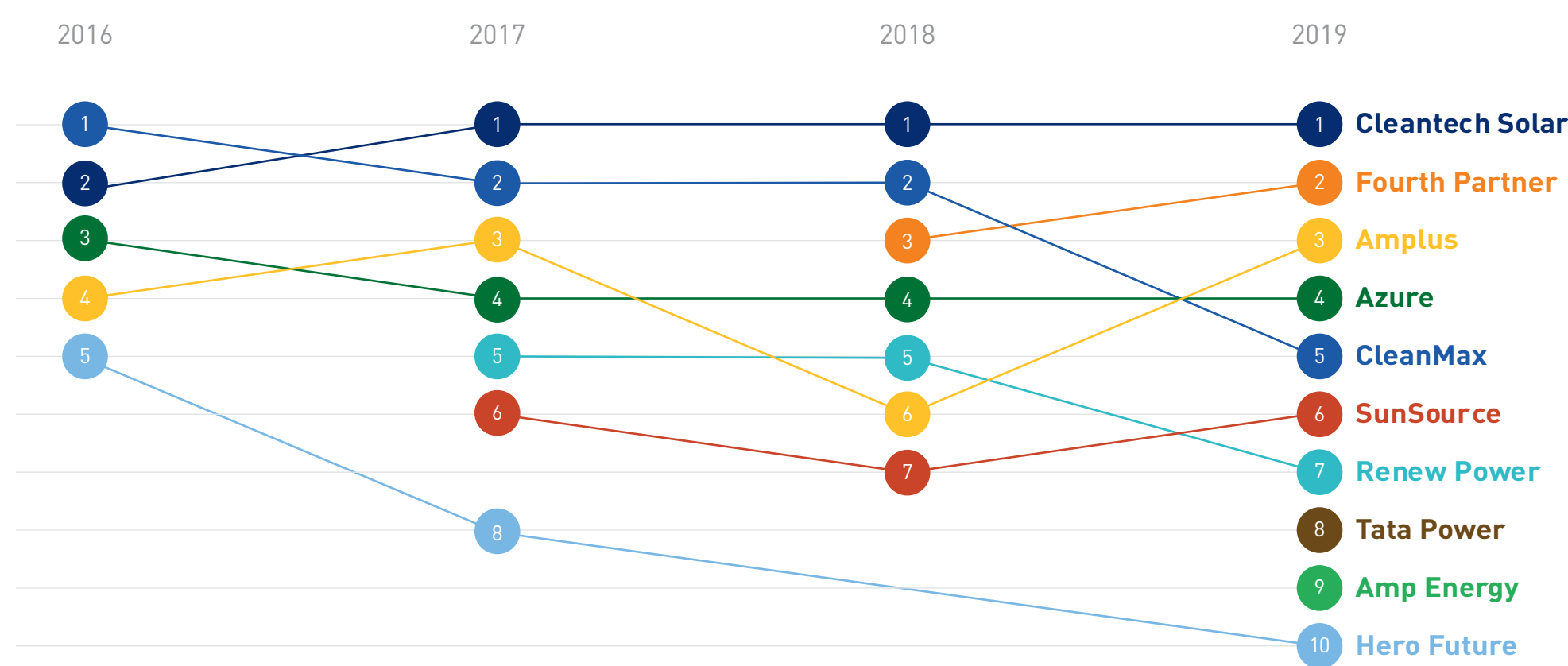
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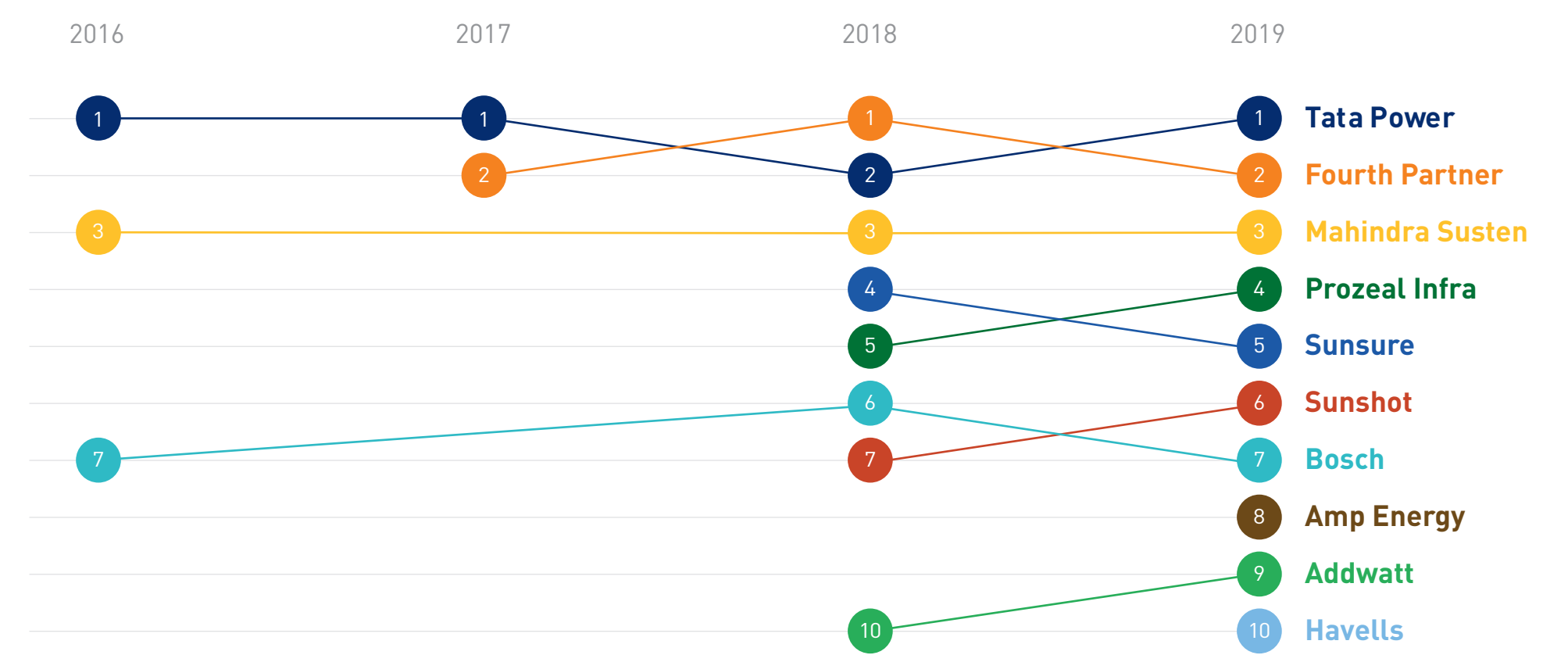
Top 10 project developers

Rankings



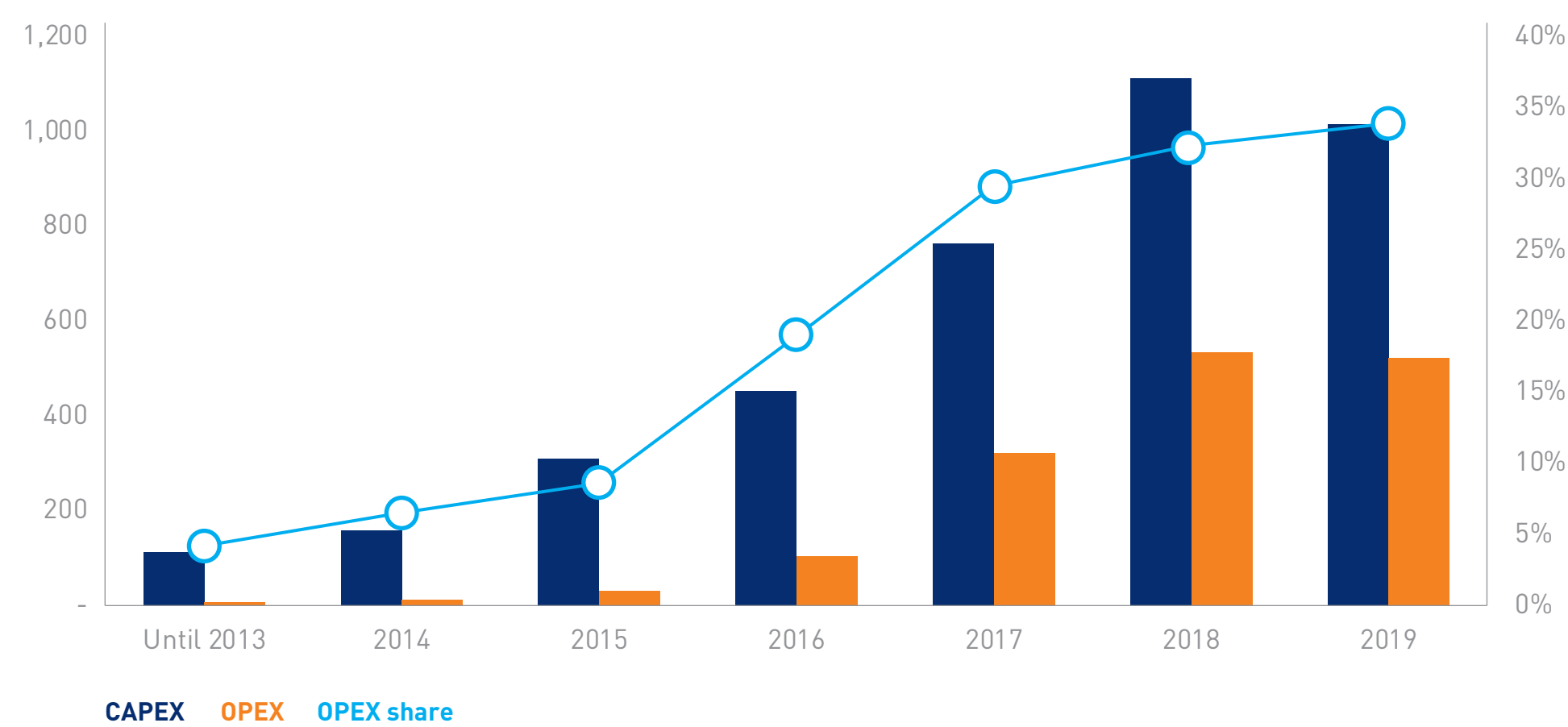
Top 10 EPC contractors

Rankings



Capacity installed by business model²

YoY share of OPEX model has increased from 4% in 2013 to 34% in 2019

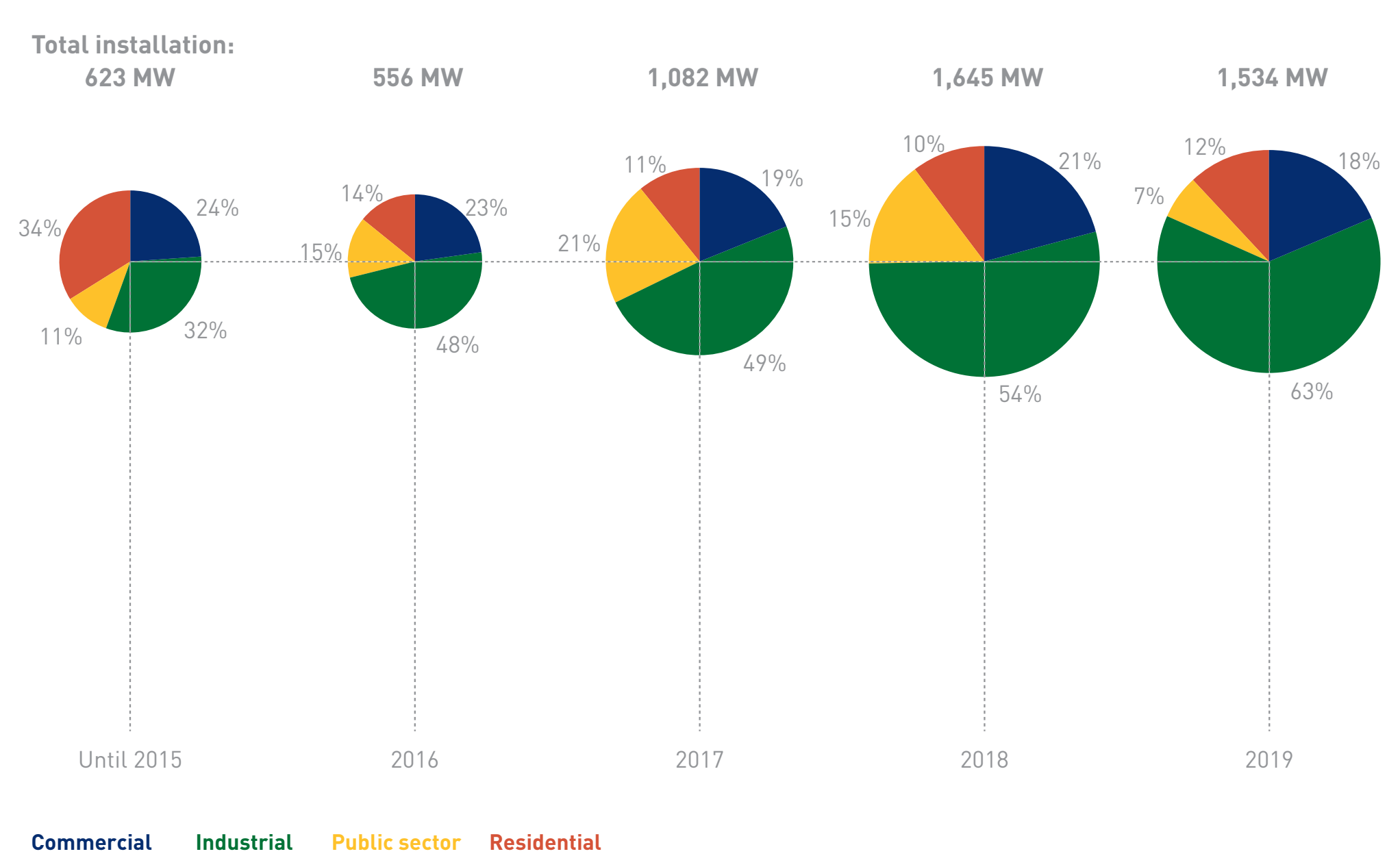


Notes:

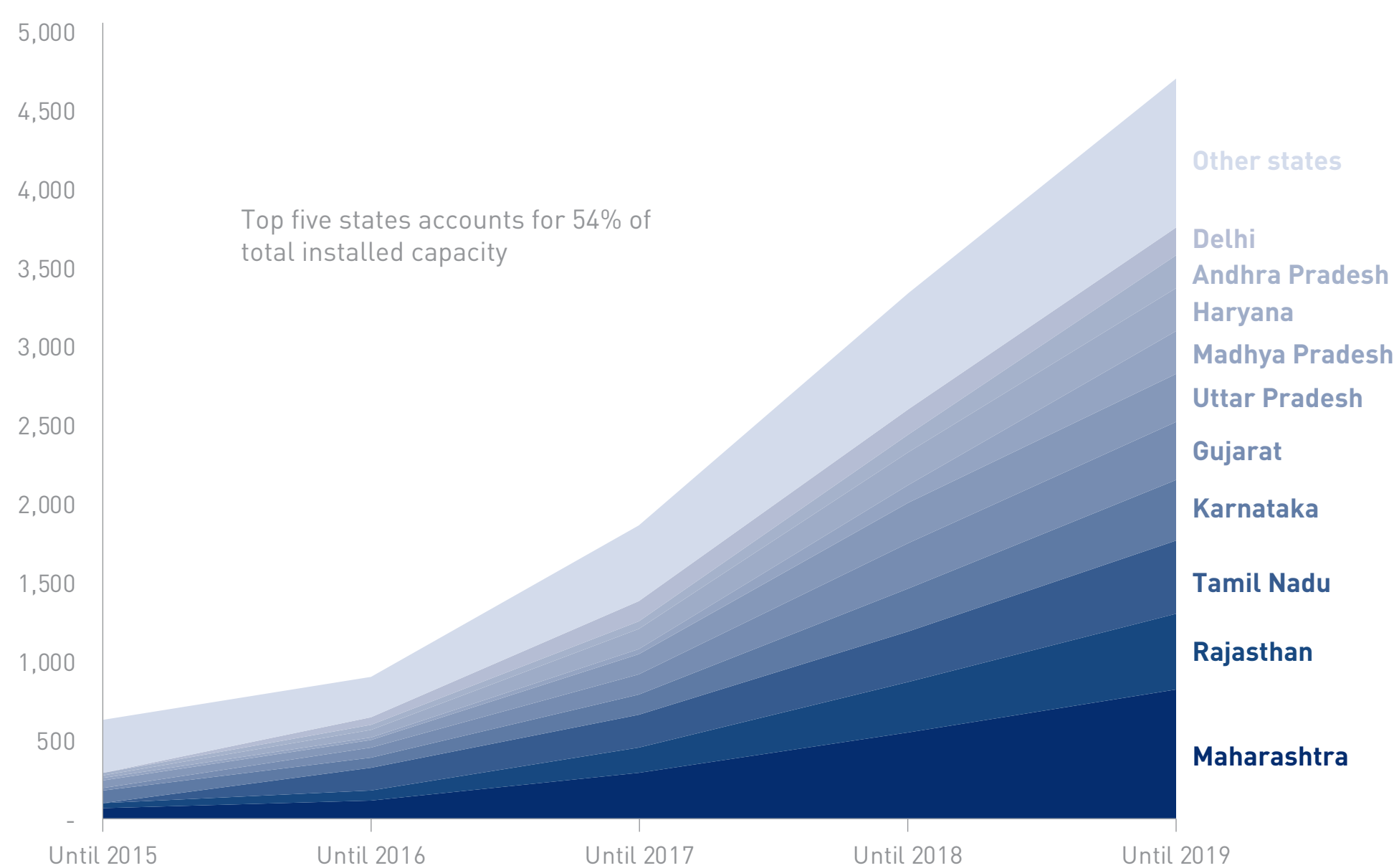
- Methodology**
BRIDGE TO INDIA has conducted an extensive data collection exercise and relied on multiple market sources including project developers, equipment suppliers and state nodal agencies to provide accurate, factual information as far as possible. Some suppliers were either unreachable or did not validate the data available with us. All data has been cross-referenced with data provided by government departments and other market players, where possible. However, we do not guarantee completeness or accuracy of any information.
We have classified all onsite solar systems (including any ground-based systems) as rooftop solar systems.
Self-EPC denotes EPC services rendered in-house by developers or their affiliates, who are not engaged in providing EPC services to third party clients.
All capacity numbers are specified in AC MW.
- OPEX (operating expenditure)-based systems are owned and installed by third-party investors at consumer premises. CAPEX (capital expenditure)-based systems are financed and owned by the consumers.
- Installation data by state is not available for residential consumers.

Share of different consumer segments

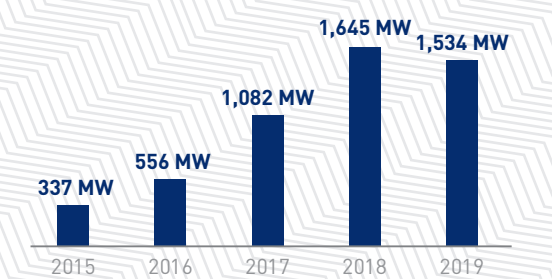
Share of Industrial consumers has increased steadily from 32% to 63%



Capacity addition in top states, MW³



INDIA SOLAR ROOFTOP MAP 2019^{DEC}



Total installed capacity as on 31 December 2019
5,440 MW



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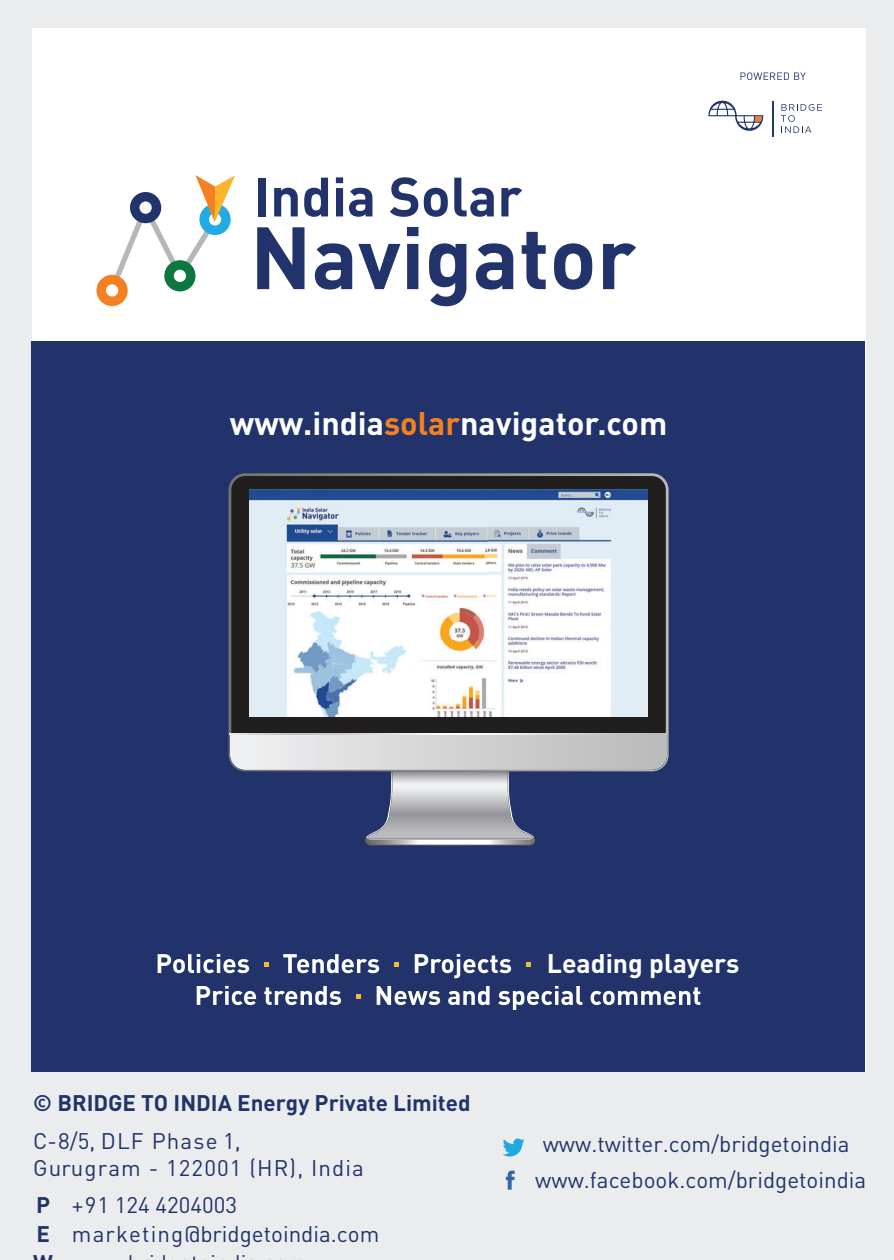
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