



EUROPE

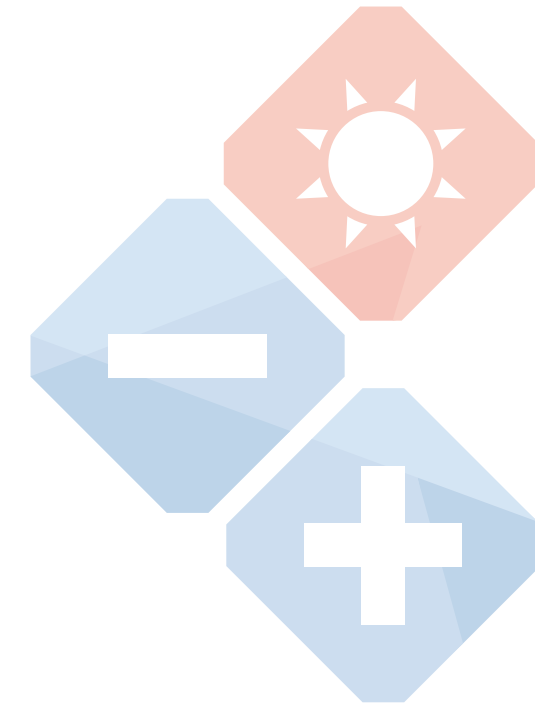
SOLAR SUPPLY CHAIN MAP

Edition 1 - 2025



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ABOUT US

Since 2009, Sinovoltaics, a Dutch-German solar PV and BESS technical compliance and quality assurance service firm has been a pioneer in the solar photovoltaic and BESS industries.

With our AI-based SELMA software and industry leading Zero Risk Solar® guarantee, our mission is to eliminate all PV & BESS product defects, enabling investors and the world to succeed with minimal investment risks.

We have inspection teams located in Mainland China, Vietnam, Thailand, India, Türkiye, and the United States. They are ready to visit your supplier factory.

INTRODUCTION

Sinovoltaics Solar Supply Chain Maps

Dive into the heart of the solar industry, exploring the latest maps showcasing existing and future solar module manufacturers alongside their critical suppliers in solar cells, wafers, ingots, and polysilicon.

Key Features:

- **Region-Specific Maps:** Tailored for each thriving solar market - North America, Europe, Southeast Asia, and India.
- **Manufacturer Directory:** Access up-to-date information on solar manufacturers operating in each region. Stay ahead of the curve by understanding the key players in each market.
- **Expansion Tracking:** Stay informed on industry growth with real-time updates on which manufacturers are currently building new facilities.
- **Comprehensive Updates:** Our dedicated team ensures that the solar supply chain maps are refreshed every 4 months, offering the latest information on evolving market dynamics.

Sinovoltaics' Solar Supply Chain Maps empower you with the knowledge needed to navigate the global solar landscape effectively. Download the latest maps now and stay ahead in the race to harness the potential of solar energy.





May 2025

The Sinovoltaics Supply Chain Map (SSCM) - Europe for Edition 1 2025 includes several notable changes since our last report.

Thanks to market feedback, the 2025 first edition of the Europe, Mediterranean & Turkey Solar Supply Chain Map has some notable revisions and additions.

In general, the EU market is facing challenges with several bankruptcies. The EU's opportunities are now aligned with the Clean Industrial Deal proposed by the EU Commission, which should help revitalize the Solar PV manufacturing in Europe, although more support measures will still be needed.

To recap the latest updates;

EU Module Manufacturing

- Kivanc has been added to this edition of Sinovoltaics' Solar Supply Chain Map. Their goal is 1.2 GW of module production and 5 GW of cell manufacturing.
- Elite Solar is looking to manufacture 8 GW in Egypt.
- SC Heliomat is aiming to manufacture 1.5 GW in Romania.
- Sunart PV Enerji has also been added to the Map with 300 MW of production in Turkey.
- EDF decided to shut down Photowatt and Systovi has also gone into liquidation.
- RECOM Silia has also halted their production in France.
- Gest Enerji, Suoz Energy Group and Solar Turk have closed their doors in Turkey.
- Innolane has gone bankrupt in the Netherlands.
- Solarwatt has also decided to close its manufacturing site in Dresden, Germany.
- Despite previously announcing 5 GW of production in Belgium and Georgia, Belinus has also gone bankrupt.
- Energetica filed for insolvency in December 2023.



Cell

- Meyer Burger has stopped module production but is retaining its 500 MW cell production facility in Switzerland. There are ongoing negotiations with bondholders about restructuring.

Polysilicon/Ingot

- Norwegian Crystal went bankrupt in August of 2023. Also, NorSun discontinued manufacturing in Norway along with REC, abandoning their polysilicon factory in Norway in 2023.

Currently Europe, the Mediterranean, and Turkey have a combined nameplate PV module production capacity of 21 GW and ambitions to jump towards 70 GW by roughly 2030. The larger portion of the region's manufacturing hub is in Turkey.

The current combined nameplate cell capacity is 3.2 GW, but press releases indicate the capacity may grow to 55 GW by 2030.

This increased cell capacity coincides with an ingot growth from 1.5 GW to 24 GW by the same time period along with 126700 metric tonnes of Metallurgical Grade Silicon (MGS).

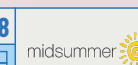
SOLAR SUPPLY CHAIN EUROPE

79		Mt	32,000	112		Mt	23,000	120		Mt	-
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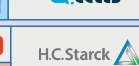
16		2024	2027
29		2024	2027
33		2024	2027
55		2024	2027
57		2024	2027
65		2024	2027
103		2024	2027

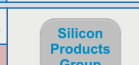
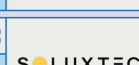
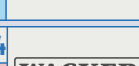
1		Mt	-
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73		2024	2027
74		2024	2027
83		2024	2027
85		2024	2027
86		2024	2027

68		2024	2027
72		2024	2027
13		2024	2027
18		2024	2027
47		2024	2027
60		2024	2027
70		2024	2027
93		2024	2027
125		2024	2027

89		2024	2027
122		2024	2027

2		2024	2027
3		2024	2027
12		2024	2027
14		2024	2027
26		Mt	2,000
46		2024	2027
48		2024	2027
49		Mt	-

50		2024	2027
71		2024	2027
77		2024	2027
94		Mt	600,000
105		2024	2027
108		2024	2027
111		2024	2027
124		2024	2027

51		2024	2027
7		Mt	105,000
8		2024	2027
96		Mt	12,500

10		2024	2027
11		2024	2027
28		Mt	15,000
34		2024	2027
37		Mt	-
43		2024	2027
44		2024	2027
56		2024	2027
95		2024	2027
99		2024	2027
118		2024	2027

15		2024	2027
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101		2024	2027
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32		2024	2027
110		2024	2027

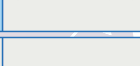
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22		2024	2027
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9		2024	2027
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4		2024	2027
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58		2024	2027
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62		2024	2027
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90		2024	2027
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100		2024	2027
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82		2024	2027
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24		2024	2027
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27		Mt	7,200
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30		2024	2027
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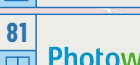
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40		2024	2027
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80		2024	2027
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102		2024	2027
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114		2024	2027
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19		2024	2027
25		Mt	100,000
35		Mt	341,000
36		Mt	-
52		2024	2027
81		2024	2027
87		2024	2027
88		2024	2027
117		2024	2027
123		2024	2027

38		2024	2027
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66		2024	2027
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67		2024	2027
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17		2024	2027
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109		2024	2027
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121		2024	2027
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59		2024	2027
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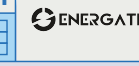
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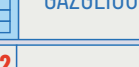
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23		2024	2027
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31		2024	2027
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41		2024	2027
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42		2024	2027
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45		2024	2027
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53		2024	2027
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54		2024	2027
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69		2024	2027
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75		2024	2027
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78		2024	2027
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84		2024	2027
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91		2024	2027
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92		2024	2027
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97		2024	2027
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98		2024	2027
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104		2024	2027
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113		2024	2027
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115		2024	2027
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116		2024	2027
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LEGEND

Module		Module capacity (GWp)
Cell		Cell capacity (GWp)
Wafer		Wafer capacity (GWp)
Ingot		
Polysilicon		Polysilicon capacity (GWp)
MGS		MGS (Metric tonnes)

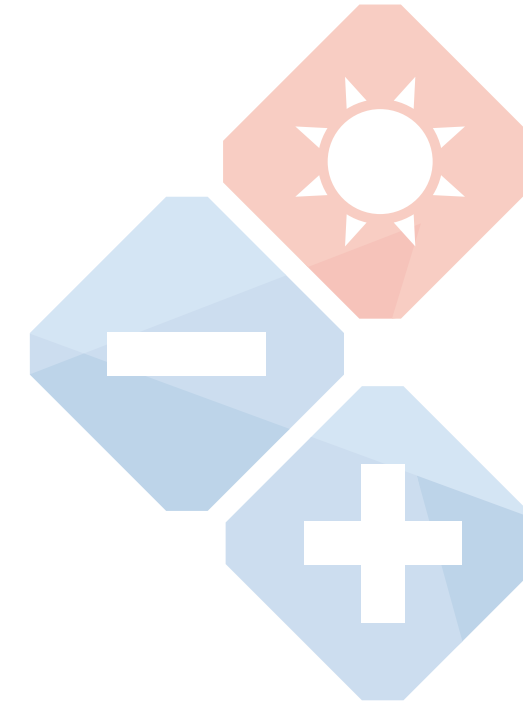
	List of factories from the same Country
	Bankrupt, halted or closing production

N	Company Name	State / Country	 Module		 Cell		 Wafer		 Ingot		 Polysilicon		 MGS	Website	Email address
			GWp		GWp		GWp		GWp		GWp		Metric Tonnes		
			2024	2027	2024	2027	2024	2027	2024	2027	2024	2027	2024		
1	Absco Limited	UK	-	-	-	-	-	-	-	-	-	-	-	https://www.absco-limited.com/	-
2	AE Solar	Germany	-	-	-	-	-	-	-	-	-	-	-	https://ae-solar.com/	-
3	Aleo Solar	Germany	0.28	0.28	-	-	-	-	-	-	-	-	-	https://www.aleo-solar.de/en	-
4	Alfa Solar	Romania	-	0.3	-	-	-	-	-	-	-	-	-	https://www.alfasolarenerji.com/en/our-products/	-
5	Alfa Solar	Turkey	0.79	1.3	-	-	-	-	-	-	-	-	-	https://www.alfasolarenerji.com/en/our-products/	-
6	Ankara Solar	Turkey	0.5	0.5	-	-	-	-	-	-	-	-	-	https://www.ankarasolar.com.tr/en/products/mbb-half-cell-solar-panel/	-
7	Ansa Silicon	Kazakhstan	-	-	-	-	-	-	-	-	-	-	105,000	https://ansasilicon.com/	-
8	Astana Solar	Kazakhstan	0.05	0.1	-	-	-	-	-	-	-	-	-	-	-
9	Astrasun Solar	Hungary / Romania	-	-	-	-	-	-	-	-	-	-	-	https://astrasun.solar/	-
10	Atersa Group	Spain	0.344	0.344	-	-	-	-	-	-	-	-	-	https://www.atersa.com/nuestra-historia-en	-
11	Aurinka	Spain	-	0.3	-	-	-	-	-	-	-	-	-	https://www.aurinkapv.com/	-
12	Avancis	Germany	0.1	0.1	-	-	-	-	-	-	-	-	-	https://www.avancis.de/en	-
13	Avia Solar	Poland	0.045	-	-	-	-	-	-	-	-	-	-	https://aviasolarbyunimot.eu/	-
14	Axsun	Germany	-	-	-	-	-	-	-	-	-	-	-	https://www.axsun.de/	-
15	Belinus	Belgium	-	-	-	-	-	-	-	-	-	-	-	https://belinus.com/en/	-
16	Biosphere Solar	Netherlands	0.005	1	-	-	-	-	-	-	-	-	-	https://www.biosphere.solar/	-
17	BiSol	Slovenia	0.45	0.45	-	-	-	-	-	-	-	-	-	https://www.bisol.com/contact	-
18	Bruk-Bet	Poland	0.12	0.12	-	-	-	-	-	-	-	-	-	https://www.bruk-bet.pl/en/about-company	-
19	Carbon	France	-	3.5	-	5	-	5	-	-	-	-	-	https://carbon-solar.com/en/	-
20	CW Enerji	Turkey	-	1.8	-	-	-	-	-	-	-	-	-	https://cw-enerji.com/tr/index.html	-
21	Daxler	Turkey	0.46	0.46	-	-	-	-	-	-	-	-	-	-	-
22	Ecosolifer	Hungary	0.1	0.1	0.1	0.1	-	-	-	-	-	-	-	https://ecosolifer.com/#technology	-
23	Elin Enerji	Turkey	0.9	1	-	-	-	-	-	-	-	-	-	https://elin.com.tr/en/home/	-
24	Elite Solar	Egypt	-	8	-	8	-	-	-	-	-	-	-	-	-
25	Elkem	France	-	-	-	-	-	-	-	-	-	-	100,000	https://www.elkem.com/media/news-articles/elkem-announces-expansion/	-

N	Company Name	State / Country												Website	Email address
			Module		Cell		Wafer		Ingot		Polysilicon		MGS		
			GWp		GWp		GWp		GWp		GWp		Metric Tonnes		
			2024	2027	2024	2027	2024	2027	2024	2027	2024	2024			
26	Elkem	Germany	-	-	-	-	-	-	-	-	-	-	2,000	https://www.elkem.com/media/news-articles/elkem-announces-expansion/	-
27	Elkem	Italy	-	-	-	-	-	-	-	-	-	-	7,200	https://www.elkem.com/media/news-articles/elkem-announces-expansion/	-
28	Elkem	Spain	-	-	-	-	-	-	-	-	-	-	15,000	https://www.elkem.com/media/news-articles/elkem-announces-expansion/	-
29	EISun	Netherlands	0.1	0.1	-	-	-	-	-	-	-	-	-	https://www.elsun.nl/	-
30	Enel/3Sun	Italy	3	3	0.2	3.2	-	-	-	-	-	-	-	https://www.3sun.com/en	-
31	Energate	Turkey	0.7	0.7	-	-	-	-	-	-	-	-	-	-	-
32	Energetica	Austria	-	-	-	-	-	-	-	-	-	-	-	https://www.energetica.at/en/	-
33	Energyra	Netherlands	0.1	0.4	-	-	-	-	-	-	-	-	-	https://www.energyra.com/	-
34	Escelco European Cell Company	Spain	0.07	-	-	-	-	-	-	-	-	-	-	-	-
35	Ferroglobe	France	-	-	-	-	-	-	-	-	-	-	341,000	https://www.ferroglobe.com/static-files/9ca95d61-acbc-4459-9689-89b3478e32f6	-
36	Ferroglobe	France	-	-	-	-	-	-	-	-	-	-	-	-	-
37	Ferroglobe	Spain	-	-	-	-	-	-	-	-	-	-	-	https://www.ferroglobe.com/about-ferroglobe/industrial-footprint	-
38	Flisom AG/ Ascent Solar	Switzerland	-	-	-	-	-	-	-	-	-	-	-	-	-
39	FuturaSun	Italy	-	0.7/2	-	-	-	-	-	-	-	-	-	https://www.futurasun.com/	-
40	Gala Spa	Italy	0.04	0.04	-	-	-	-	-	-	-	-	-	https://www.gala.it/chi-siamo-eng/	-
41	Gazgliou	Turkey	0.2	0.2	-	-	-	-	-	-	-	-	-	-	-
42	Gest Enerji	Turkey	0.15	-	-	-	-	-	-	-	-	-	-	https://gest-energy.com/	-
43	Giga PV	Spain	-	-	-	1	-	-	-	-	-	-	-	https://giga-pv.pl/news/	-
44	Greenland Gigafactory	Spain	-	5	-	-	-	-	-	-	-	-	-	https://sites.google.com/greenlandgiga.com/greenland	-
45	GTC	Turkey	0.1	0.1	-	-	-	-	-	-	-	-	-	http://gtctrade.com/en/	-
46	Hanover Solar	Germany	-	-	-	-	-	-	-	-	-	-	-	https://www.hanoversolar.de/	-
47	Hanplast	Poland	0.1	0.1	-	-	-	-	-	-	-	-	-	https://hanplast.energy/	-
48	Hanwha Q Cells	Germany	-	-	-	-	-	-	-	-	-	-	-	https://www.hanwha.com/en/products_and_services/affiliates/hanwha_q_cells.html	-
49	HC Starck/ Kyocera	Germany	-	-	-	-	-	-	-	-	-	-	-	https://www.hcstarck.com/en/	-
50	Heckert	Germany	0.4	0.8	-	-	-	-	-	-	-	-	-	https://www.heckertsolar.com/	-

N	Company Name	State / Country	 Module		 Cell		 Wafer		 Ingot		 Polysilicon		 MGS	Website	Email address
			GWp		GWp		GWp		GWp		GWp		Metric Tonnes		
			2024	2027	2024	2027	2024	2027	2024	2027	2024	2027	2024		
101	SolarCells	Luxemburg	0.05	0.1	-	-	-	-	-	-	-	-	-	https://evocells.be/en/	-
102	Solarday	Italy	0.2	0.2	-	-	-	-	-	-	-	-	-	https://solarday.eu/	-
103	Solarge	Netherlands	0.1	1	-	-	-	-	-	-	-	-	-	https://solarge.com/	-
104	Solarturk	Turkey	-	-	-	-	-	-	-	-	-	-	-	https://www.solarturk.com.tr/	-
105	Solarwatt	Germany	-	-	-	-	-	-	-	-	-	-	-	https://www.solarwatt.com/solutions/our-products/product-overview/panels#on-the-roof	-
106	SoletPV	Lithuania	0.065	0.065	0.065	-	-	-	-	-	-	-	-	https://soletpv.com/	-
107	SoliTek	Lithuania	0.2	0.6	-	-	-	-	-	-	-	-	-	https://www.solitek.eu/en	-
108	Soluxtec	Germany	0.25	0.55	-	-	-	-	-	-	-	-	-	https://www.soluxtec.eu/	-
109	Solvis	Croatia	0.15	0.15	-	-	-	-	-	-	-	-	-	https://solvis.hr/en/	-
110	Sonnenkraft	Austria	-	-	-	-	-	-	-	-	-	-	-	https://www.sonnenkraft.com/de/	-
111	Sonnenstromfabrik	Germany	0.525	0.525	-	-	-	-	-	-	-	-	-	https://www.sonnenstromfabrik.com/nl/	-
112	Stakksberg	Iceland	-	-	-	-	-	-	-	-	-	-	23,000	https://stakksberg.com/en/	-
113	Sunart PV Enerji	Turkey	0.3	0.3	-	-	-	-	-	-	-	-	-	-	-
114	Sunerg Solar	Italy	0.1	0.1	-	-	-	-	-	-	-	-	-	https://www.sunergsolar.com/en/	-
115	Sunergy	Turkey	0.3	0.3	-	-	-	-	-	-	-	-	-	http://www.sunergymodule.com/	-
116	Suoz Energy Group	Turkey	-	-	-	-	-	-	-	-	-	-	-	https://www.suozenergy.com/en/about-us/	-
117	Systovi	France	-	-	-	-	-	-	-	-	-	-	-	https://www.systovi.com/	-
118	Tamesol	Spain	0.1	0.1	-	-	-	-	-	-	-	-	-	https://tamesol.com/	-
119	UKSol	UK	0.002	0.002	-	-	-	-	-	-	-	-	-	https://www.uksol.uk/mono-half-cell	-
120	United Silicon	Iceland	-	-	-	-	-	-	-	-	-	-	-	https://lowanaveal.wordpress.com/tag/united-silicon/	-
121	VallisSolaris	Croatia	-	2	-	-	-	-	-	-	-	-	-	-	-
122	Valoe	Finland	-	-	-	0.1	-	-	-	-	-	-	-	https://valoe.com/solar-modules	-
123	Voltec Solar	France	0.3	0.5	-	-	-	-	-	-	-	-	-	https://www.voltec-solar.com/	-
124	Wacker	Germany	-	-	-	-	-	-	-	-	27.6	53	-	https://www.wacker.com/cms/en-us/about-wacker/profile-and-organization/wacker-polysilicon.html	-
125	Xdisc	Poland	0.06	0.06	0.06	-	-	-	-	-	-	-	-	https://xdisc-fotowoltaika.pl/	-





ARE YOU A SOLAR MANUFACTURER?

In our next edition of the Europe Solar Supply Chain Map, we aim at listing how procurement stakeholders can contact each factory.

Do not hesitate to reach out at contact@sinovoltaics.com so we can list your contact details.

Also, if your solar manufacturing project is not listed or has been updated, please contact us and share your latest ambitions. We will include it in our next release.

SOURCES

The report presents data compiled from various sources, including publications, market reports, manufacturer press releases, and Sinovoltaics' direct relationships with manufacturers. We extend our gratitude to these valuable data contributors.

PV Magazine New Releases

PV Tech News Releases

LinkedIn Posts

Company Websites

<https://www.enfsolar.com/directory/panel/monocrystalline?country=187>

https://www.solarfeeds.com/?catid=60&country=United%20Kingdom&supplied_project=Austria&capacity=52

Call with manufacturers

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