



EUROPE

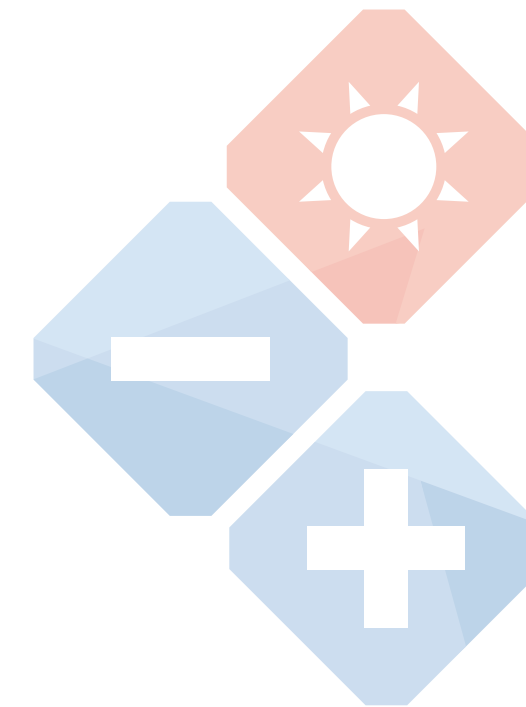
SOLAR SUPPLY CHAIN MAP

Q2 2024



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ABOUT US

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

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

We have inspectors located in China, Vietnam, Cambodia, India, Turkey, 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.



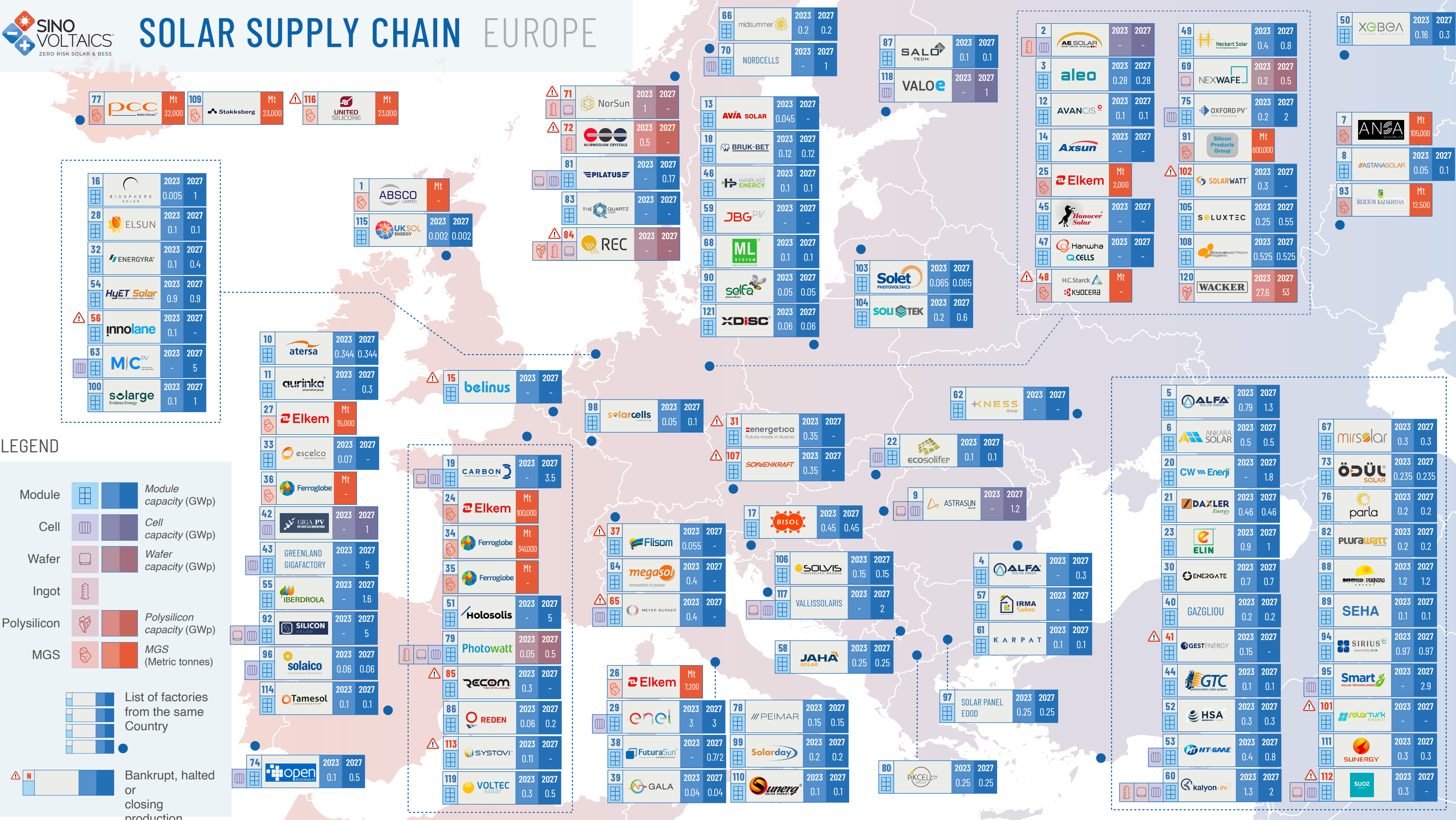


July 1, 2024

The Sinovoltaics Supply Chain Map (SSCM) - European for Q2 2024

- This latest version of the Sinovoltaics European Solar Supply Chain Map has gotten a serious revamp thanks to great feedback from the market. We've included several of additions and also left out BIPV module manufacturers in this iteration.
- The current market press releases and data indicate that there is 22 GW of module production capacity currently in Europe, but an additional 38 GW has been announced by various parties for 2027/2030. The current cell production is at 3 GW, but announcements look to jump by 37 GW in the coming 3 - 5 years for a total of 40 GW by 2027/2030. There had been 3 GW of Ingot capacity, but that figure has now reduced to 2 GW with Norsun halting its production capacity for now. Nonetheless, VallisSolaris, Silicon Valen, and Kalyon PV will collectively add 20 GW of ingot capacity by 2027/2030.
- Unfortunately, the EU market is also seeing some contraction. Meyer Burger has shifted its module production to the US, but it will continue to produce cells in Europe. The following companies have either suspended production or shifted their production in Europe: Photowatt, Sonnenkraft, Energetica, Belinus, Systovi, RECOM Silia, Solarwatt, Innolane, REC, Norwegian Crystal, Filsom AG, Gest Enerji, Suoz Energy Group, and Solarturk.

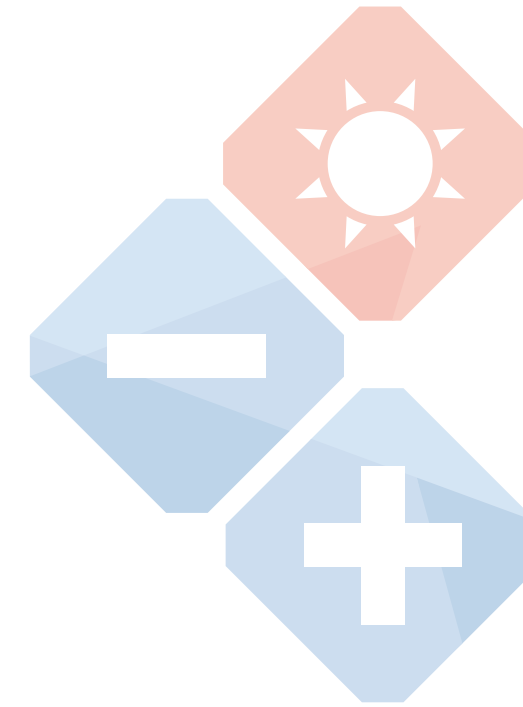
SOLAR SUPPLY CHAIN EUROPE



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No.	Company name	State/Country	Module		Cell		Wafer		Ingot		Polysilicon		MGS
			GWp		GWp		GWp		GWp		GWp		Metric Tonnes
			2023	2027	2023	2027	2023	2027	2023	2027	2023	2027	2023
94	Sirius	Turkev	0.97	0.97	-	-	-	-	-	-	-	-	-
95	Smart Solar	Turkey	-	2.9	-	2	-	-	-	-	-	-	-
96	Solaico	Spain	0.06	0.06	0.06	-	-	-	-	-	-	-	-
97	Solar Panel Eood	Bulgaria	0.25	0.25	-	-	-	-	-	-	-	-	-
98	SolarCells	Luxemburg	0.05	0.1	-	-	-	-	-	-	-	-	-
99	Solarday	Italy	0.2	0.2	-	-	-	-	-	-	-	-	-
100	Solarge	Netherlands	0.1	1	-	-	-	-	-	-	-	-	-
101	Solarturk	Turkey	-	-	-	-	-	-	-	-	-	-	-
102	Solarwatt	Germany	0.3	-	-	-	-	-	-	-	-	-	-
103	SoletPV	Lithuania	0.065	0.065	0.065	-	-	-	-	-	-	-	-
104	SoliTek	Lithuania	0.2	0.6	-	-	-	-	-	-	-	-	-
105	Soluxtec	Germany	0.25	0.55	-	-	-	-	-	-	-	-	-
106	Solvis	Croatia	0.15	0.15	-	-	-	-	-	-	-	-	-
107	Sonnenkraft	Austria	0.35	-	-	-	-	-	-	-	-	-	-
108	Sonnenstroomfabrik	Germany	0.525	0.525	-	-	-	-	-	-	-	-	-
109	Stakksberg	Iceland	-	-	-	-	-	-	-	-	-	-	23,000
110	Sunerg Solar	Italy	0.1	0.1	-	-	-	-	-	-	-	-	-
111	Sunergy	Turkey	0.3	0.3	-	-	-	-	-	-	-	-	-
112	Suoz Energy Group	Turkey	0.3	-	-	-	0.06	0.06	-	-	-	-	-
113	Systovi	France	0.11	-	-	-	-	-	-	-	-	-	-
114	Tamesol	Spain	0.1	0.1	-	-	-	-	-	-	-	-	-
115	UKSol	UK	0.02	0.02	-	-	-	-	-	-	-	-	-
116	United Silicon	Iceland	-	-	-	-	-	-	-	-	-	-	23,000
117	VallisSolaris	Croatia	-	2	-	2	-	4	-	-	-	-	-
118	Valoe	Finland	-	-	-	0.1	-	-	-	-	-	-	-
119	Voltec Solar	France	0.3	0.5	-	-	-	-	-	-	-	-	-
120	Wacker	Germany	-	-	-	-	-	-	-	-	27.6	53	-
121	Xdisc	Poland	0.06	0.06	0.06	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-	-	-	-	-





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>

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Call with manufacturers

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[guccounter=1&guce_referrer=aHR0cHM6Ly93d3cuZ29vZ2xlLnNvbS8&guce_referrer_sig=AQAAAJhloJ-eDhOMkkSZ6fuAX6Xt7Xs0LSLx84IsCJmupl_mfZsHGHCfXByXISwR2-R4T9CG65hibs9X8vGuZfCwKGtiJFQltqfdsgGySw75TTdtloCfXBE2hoEB24mwVlyP4Cd_1y_AGbLV2Bv61NvfkEgujZKTN9X3tgk17DgSRP-w](https://finance.yahoo.com/news/16-largest-silicon-producers-world-212541541.html?guccounter=1&guce_referrer=aHR0cHM6Ly93d3cuZ29vZ2xlLnNvbS8&guce_referrer_sig=AQAAAJhloJ-eDhOMkkSZ6fuAX6Xt7Xs0LSLx84IsCJmupl_mfZsHGHCfXByXISwR2-R4T9CG65hibs9X8vGuZfCwKGtiJFQltqfdsgGySw75TTdtloCfXBE2hoEB24mwVlyP4Cd_1y_AGbLV2Bv61NvfkEgujZKTN9X3tgk17DgSRP-w)

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<https://www.linkedin.com/pulse/polysilicon-indias-production-potential-solar-module-manufacturing/>

ETIP PV Photovoltaics Whitepaper

Fraunhofer ISE Photovoltaics Report

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<https://www.solarstewardshipinitiative.org/about-ssi/supporters/>

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<https://esmc.solar/esmc-members/>

<https://ibc4.eu/>

<https://www.thyssenkrupp.com/en/newsroom/press-releases/kazakhstan-s-first-silicon-metal-plant-starts-production-3160.html>

<https://xml.metalbulletin.com/Article/3846601/Steel-All/Ferroglobe-to-slash-silicon-metal-capacity-on-weak-pricing.html>





ELIMINATE RISKS AND GUARANTEE PROJECT ROI

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