

The Top 10 PV Tracker Suppliers Of 2016



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NEXTracker and Array Technologies Inc. (ATI) “remain far and away the leading suppliers of PV tracker systems globally,” according to IHS Markit analysts. In a new research note, the analysts rank the top 10 PV tracker suppliers of 2016, a record-breaking year for the solar industry overall, and provide an outlook for the global tracker market.

IHS Markit’s Camron Barati tells **Solar Industry**, “Overall, the global PV tracker market grew in 2016, as more developers and [engineering, procurement and construction (EPC) contractors] continue to adopt tracking solutions for their utility-scale projects to take advantage of the improved levelized cost of energy (LCOE) of such systems.”

The U.S. was the biggest PV tracker market worldwide, but Barati notes, “Asia joined the Americas in reaching the gigawatt-scale market size for PV trackers in 2016, with the EMEA region lagging behind, primarily due to the lower

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level of utility-scale demand in such markets. The EMEA region will likely experience significant growth for tracker solutions as utility-scale demand grows, particularly in emerging markets in the Middle East.”

As for the top 10 tracker suppliers, Barati explains, “NEXTracker and Array Technologies collectively shipped over 5 GW DC of PV tracker components globally in 2016, accounting for nearly 50 percent of the global tracker market during the year in terms of product shipments.”

Written by Barati and IHS Markit analyst Cormac Gilligan, the research note says NEXTracker supplied the most distributed systems, which made up two-thirds of shipped trackers among the top 10 suppliers, and ATI supplied the most centralized systems, which accounted for the remaining one-third of products shipped among the leading companies. Ultimately, IHS Markit ranks NEXTracker as the No. 1 tracker supplier of 2016.

Global PV tracker structural BoS supplier market shares - 2016		
Shipments (MWdc)		
Rank	Company	YoY shipment growth
1	Nextracker	▲
2	Array Technologies	▲
3	First Solar	▼
4	Convert Italia	▲
5	Arctech	▲
6	SunPower	▼
7	Soltec	▲
8	Clavijo	—
9	Sun Action Trackers	—
10	GameChange Solar	▲

Source: IHS Markit © IHS Markit 2017

Although First Solar ranks third on the list and “maintained shipment levels at the gigawatt scale,” according to Barati, the vertically integrated solar company lost tracker market share last year. The research note says, “This has coincided with First Solar’s announcement to downsize its EPC business and to exit the structures market in 2016.”

Barati further explains, “First Solar’s market share decreased primarily as a result of the company’s shift from using self-developed tracker products to partnering with third-party suppliers for mounting solutions, especially now that their

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core PV module products are becoming more comparable in terms of form factor to other solutions in the global market.”

Ranking sixth, SunPower, another vertically integrated solar company, also lost tracker market share. Barati says this is mainly “a result of the company’s utility-scale project deployments with its turnkey Oasis solution, which has historically depended on the lumpiness of the company’s development business, but may be less tied to self-developed products in the future.”

The research note points out that Arctech and Convert Italia rose to the top five in 2016, thanks to “success in emerging tracker markets outside of the United States in Latin America, the EMEA region and India.”

Aside from NEXTracker and ATI, the study says GameChange Solar, Soltec and Sunlink saw the most growth in the U.S., the world’s largest tracker market. However, because the U.S. PV market is expected to experience a [slump in 2017](#), the research note says that “developing international markets for trackers will be key for maintaining growth, along with developing niche solutions for small-scale applications and sites with less-than-ideal land types (uneven terrain, obstructions, etc.)” Primed international markets, according to the analysis, include Mexico, Brazil, Turkey, Jordan, Australia and India, among other regions.

Looking forward, Barati says, “Growth for the PV tracker market is expected globally in the years ahead, particularly in markets outside of the United States in Asia and Latin America as suppliers continue to convince developers and EPCs to utilize their solutions in light of the demonstrated benefits in terms of higher generation yields and broader power production over the course of the day versus fixed-tilt systems.”

He adds, “Pricing will be the primary barrier for many growth markets, but such issues are already being solved by the large international suppliers and domestic market entrants.”

Photo courtesy of Array Technologies Inc.

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