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Get Intersolar Ready: what real project data can tell us about the solar market

18 June 2026

1:00 pm – 2:00 pm | BST, London
2:00 pm – 3:00 pm | CEST, Berlin
3:00 pm – 4:00 pm | EEST, Athens

Matthew Lynas
Editor
pv magazine

Miguel Herrero
Senior Market Advisor
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Daniel Garasa Sagardoy
Research Analyst
Wood Mackenzie

Welcome!

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Do you have any questions? ❓ 🙋

Send them in via the Q&A tab. 👉 We aim to answer as many as we can today!

You can also let us know of any tech problems there.

We are recording this webinar today. 📹

We'll let you know by email where to find it and the slide deck, so you can re-watch it at your convenience. 👀 💡

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17-06-2026

One connected solar development platform

Get Intersolar Ready: what real project data can tell us about the solar market

Agenda

1. The smarter E
2. Project pipeline trends
3. Project size trends
4. Structure trends
5. Module trends
6. Inverter trends
7. Conclusions & Takeaways

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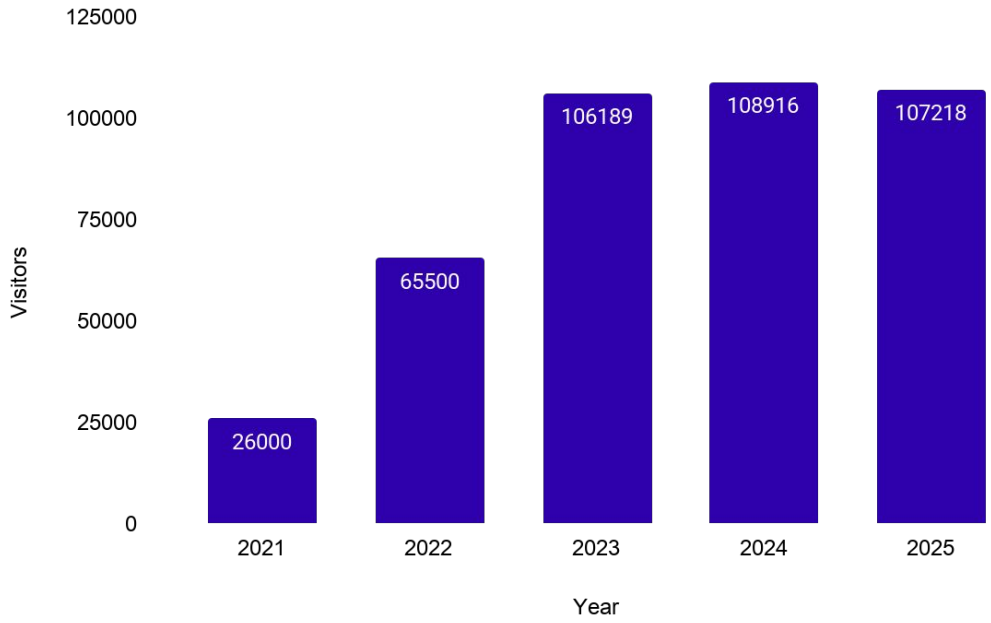
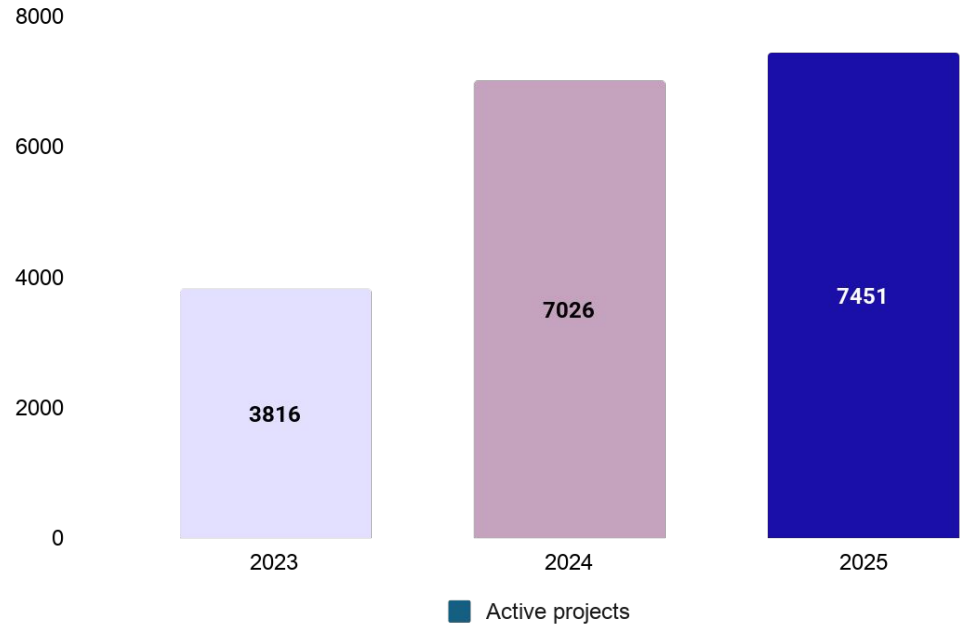
More than 50k and 4TW
active utility-scale solar
projects tracked globally
36 months
Between 2023-2025

The smarter E 2025 saw a slightly lower number of visitors than the previous year



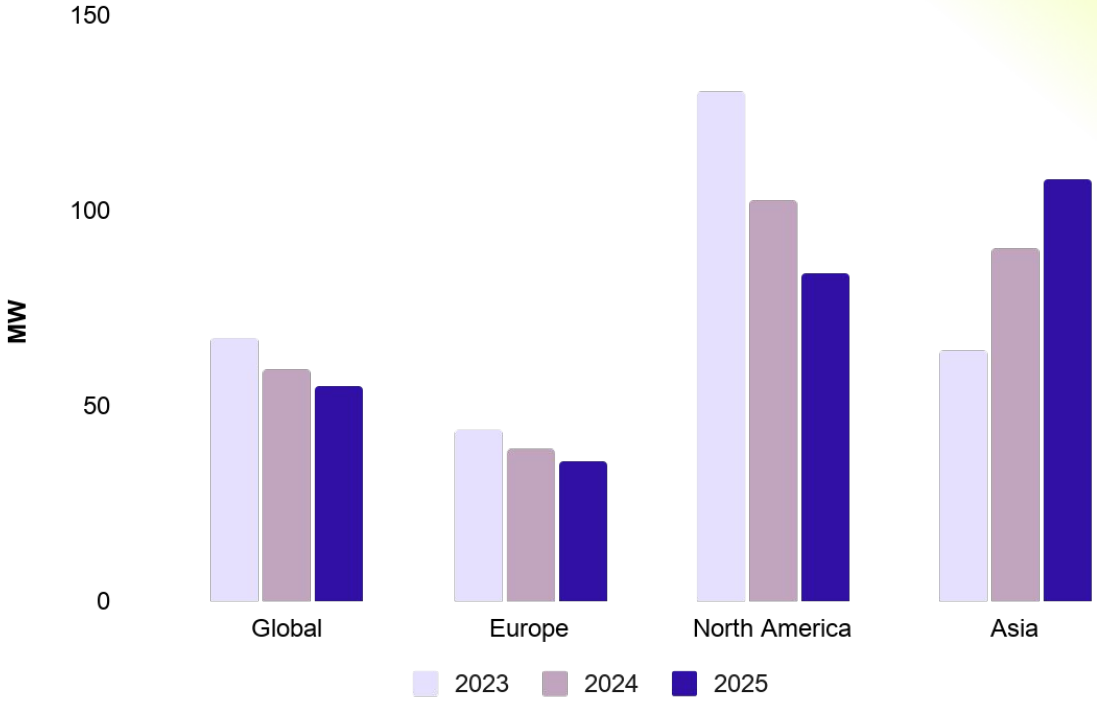
Smarter E visitors per year, Solar Promotion GmbH

Utility-scale pipeline volume in Germany grows, despite recent policy uncertainty



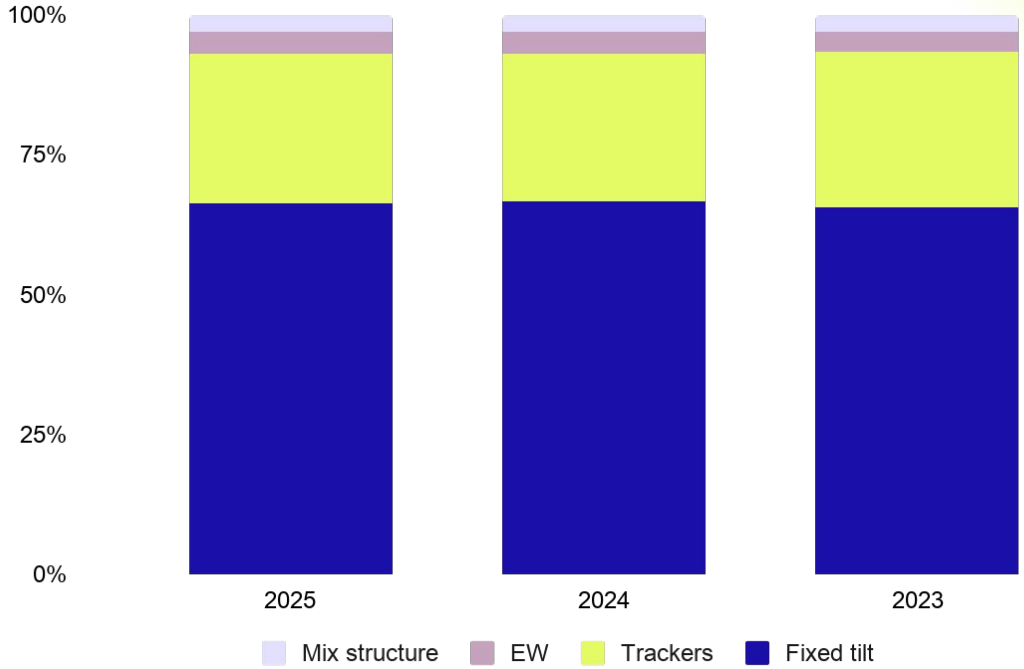
Utility-scale projects on PVcase Ground Mount in Germany

Global average project sizes are contracting, but this masks huge cross-regional divergence



Average project sizes in PVcase Ground Mount, Global and regional

Fixed tilt structures lead across Europe, with trackers dominating only in Spain and Italy

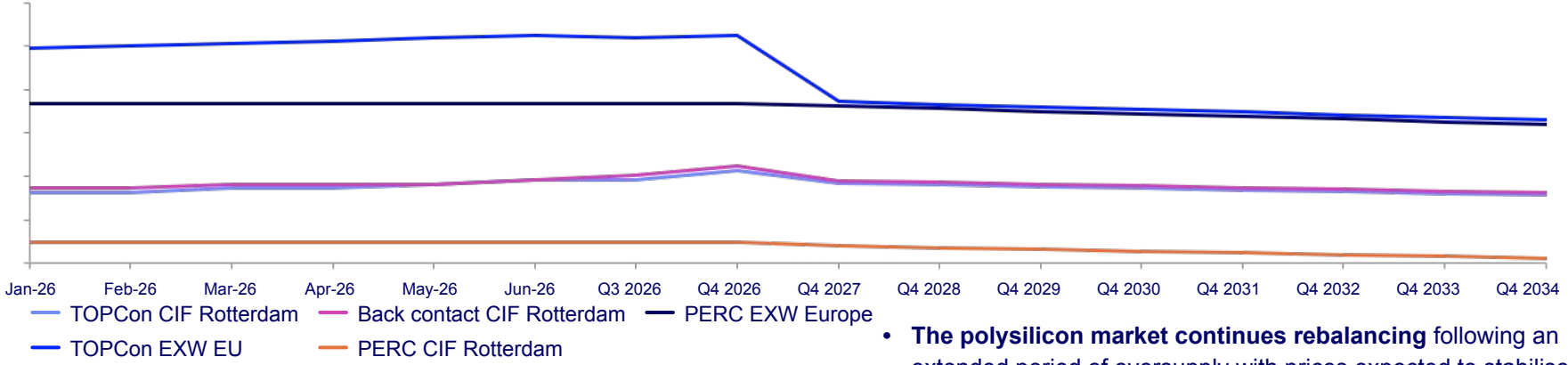


Structure type mix in PVcase Ground Mount, Europe

TOPCon becomes the industry standard, PERC subsides

High-efficiency back contact modules become increasingly cost-competitive with TOPCon modules in Europe

Module pricing (US$/$W_{dc}$), Q1 2026–Q4 2034

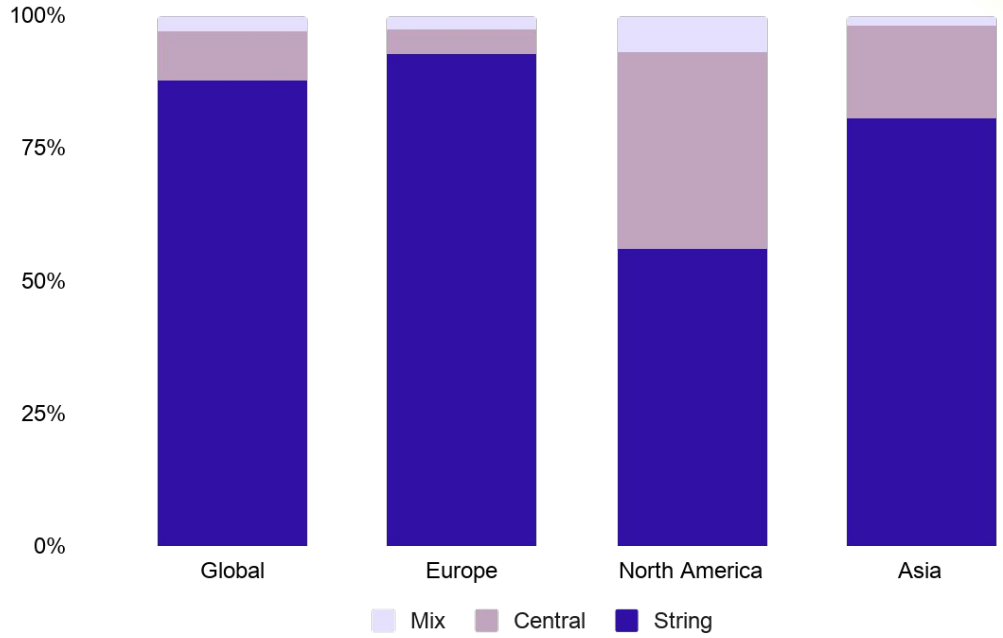


- **TOPCon and back contact modules will have price spikes of 30%** by the end of 2026 due to short term bottlenecks in cell and wafer availability. Thereafter module prices due to decline by an average of 1.5% per year with demand steadying.
- Although remaining cost competitive, less efficient PERC modules are likely to be phased out of new installation capacity by 2026.

- **The polysilicon market continues rebalancing** following an extended period of oversupply with prices expected to stabilise in Q4 2026.
- TOPCon and back contact polysilicon requirements draw slightly higher prices through 2026 as adoption begins to exceed PERC.
- As the industry transitions from rapid expansion to more incremental capacity additions, polysilicon consumption growth moderates.
- **Efficiency improvements in cell architecture** reduce the grams-per-watt requirement.

Source: Wood Mackenzie Global PV Supply Chain Pulse - April 2026

String inverter is king, while centralized architectures remain common in markets with larger-scale projects



Inverter type mix in PVcase Ground Mount, Global and regional

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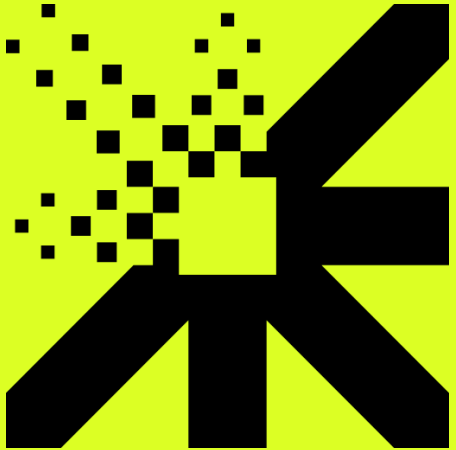
Optimize your workflow to adapt to rising complexity

The German pipeline remains robust, despite recent policy uncertainty	High activity, but policy uncertainty demands f**aster, more precise project iteration.**
On a global scale, average project sizes are decreasing, with Europe experiencing the smallest average sizes.	With shrinking project sizes **automated workflows are required to maintain project margins**
TOPCon becomes the industry standard, as Back Contact modules become increasingly cost competitive	Technological change requires **quick and easy iteration and impact on BOM**
Fixed-tilt structures remain dominant in the European market, while trackers maintain about one-third of the market share.	Unique civil & mechanical constraints call for **an adaptable platform**
String inverters are the dominate globally, and are by far the preferred choice in Europe	Complex string inverter layouts require **connected, intelligent engineering**

Questions?



Meet us at Intersolar to move solar forward!

Miguel Herrero

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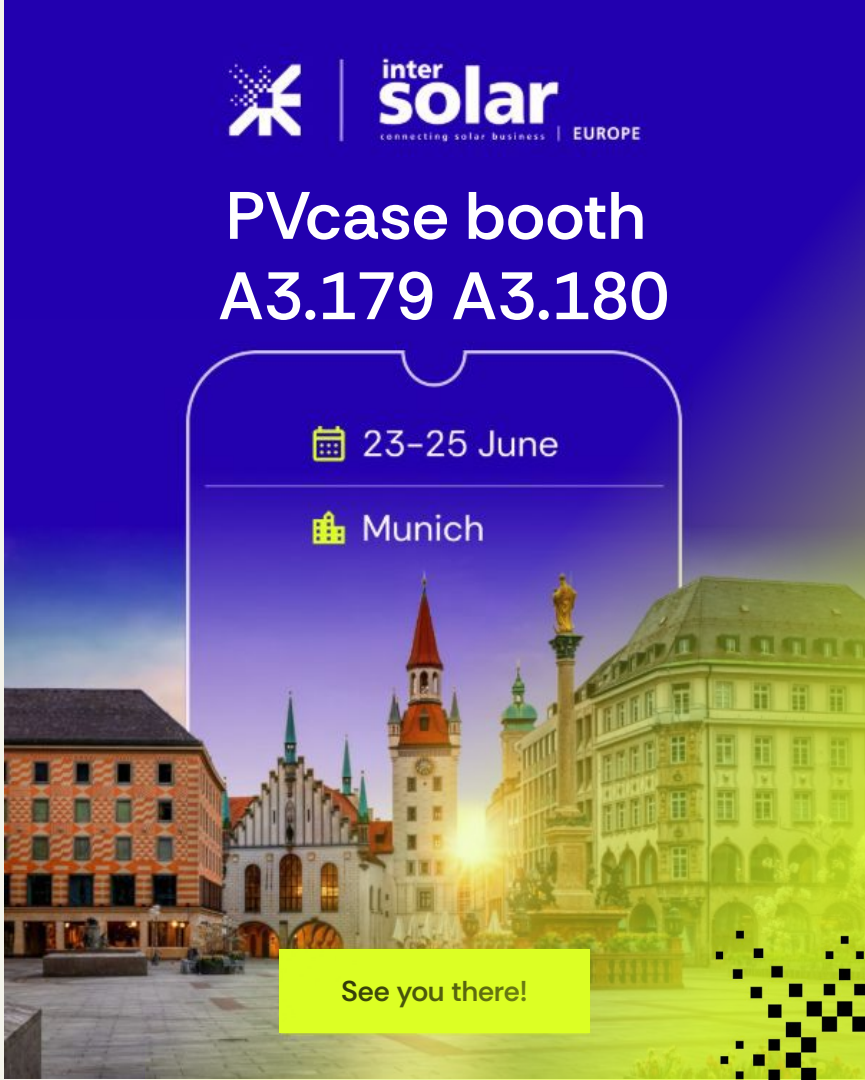
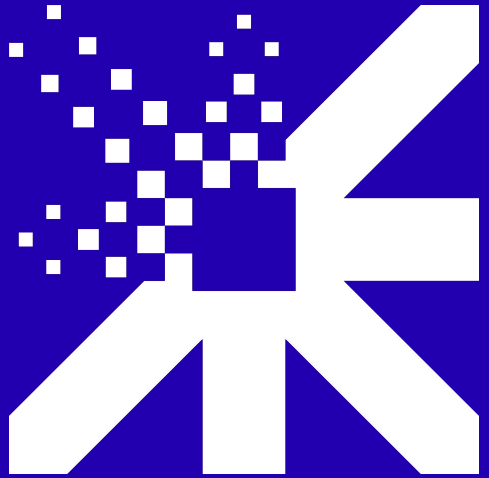


Move solar forward.



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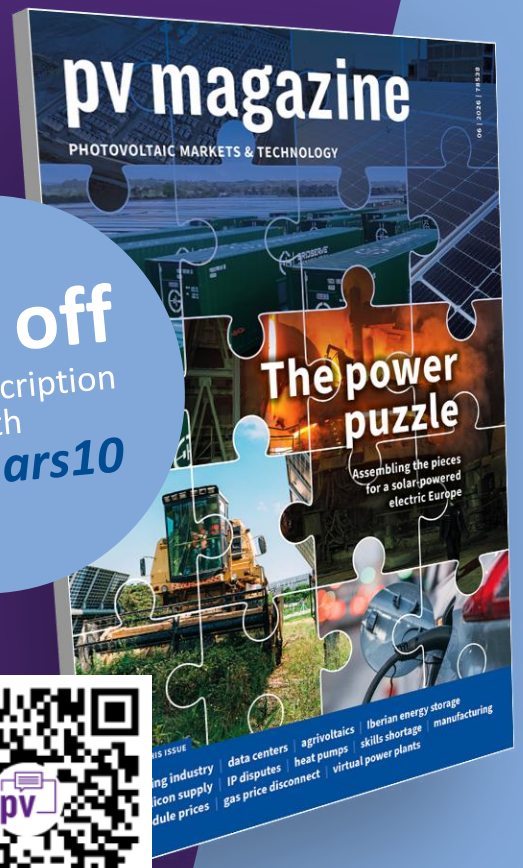

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Join us on July 9, we will provide a detailed market analysis of how geopolitical developments are creating regional pricing disparities across the photovoltaic value chain, from polysilicon to modules and critical materials such as soda ash, EVA, and POE.

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Matthew Lynas
Editor
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Thank you for joining today!