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INDIA SOLAR ROOFTOP MAP 2018

SEPTEMBER

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Total installed capacity: 3,399 MW¹

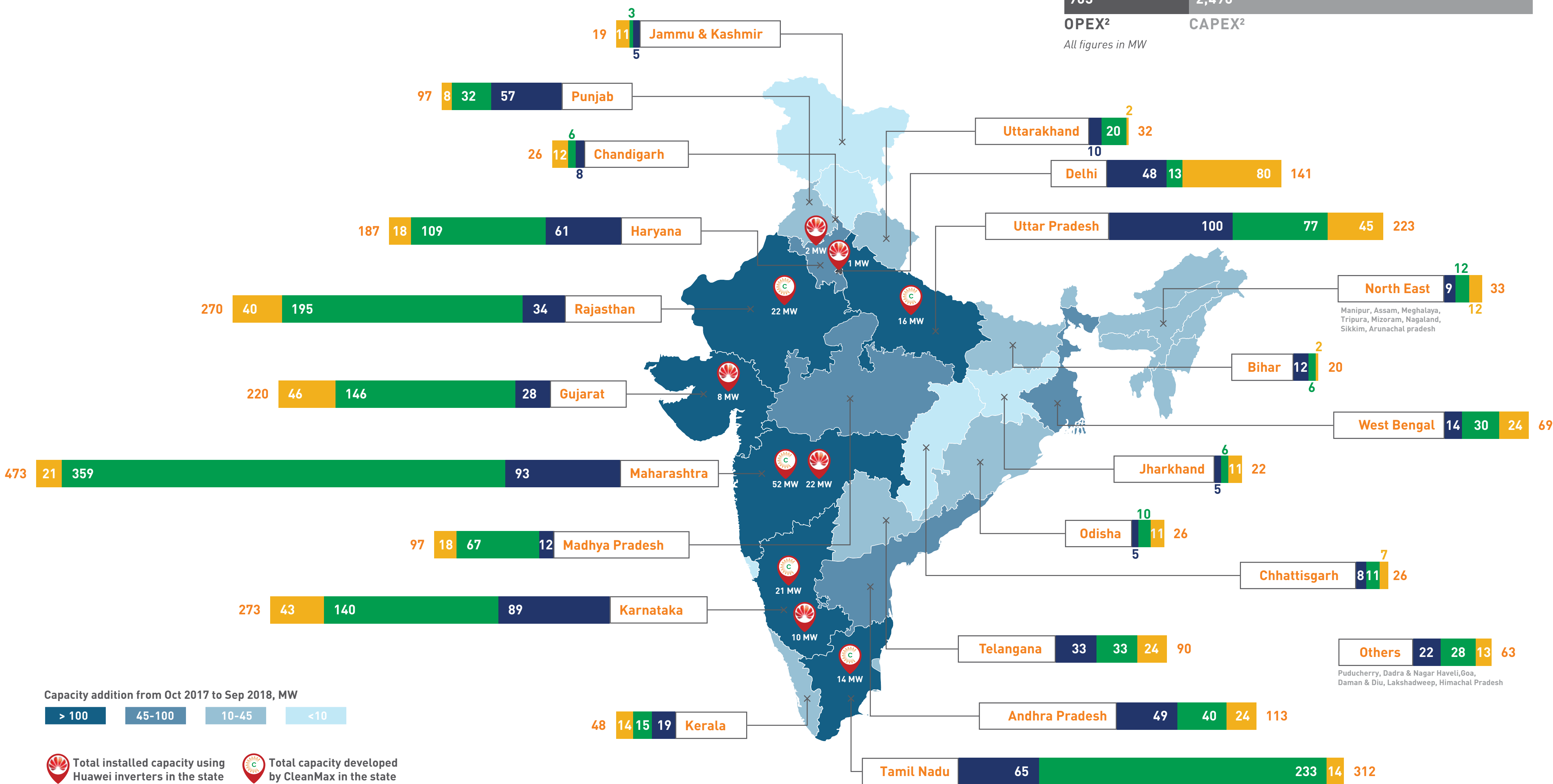
as on September 30, 2018

Public sector

785	1,591	502	521
Commercial	Industrial		Residential

903	2,496
OPEX ²	CAPEX ²

All figures in MW

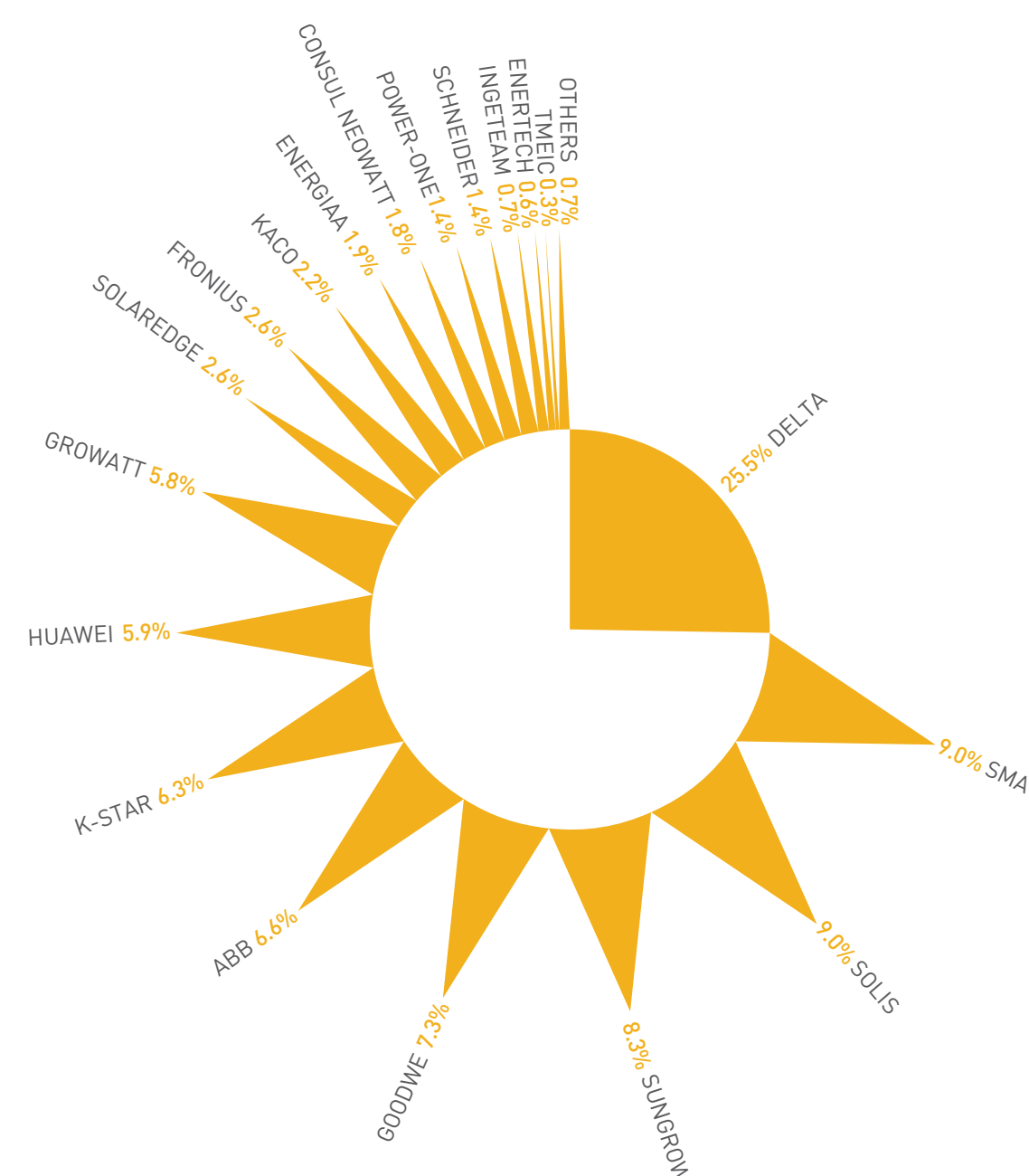


Annual market share¹

Capacity installed from Oct 2017 - Sep 2018 (1,538 MW)

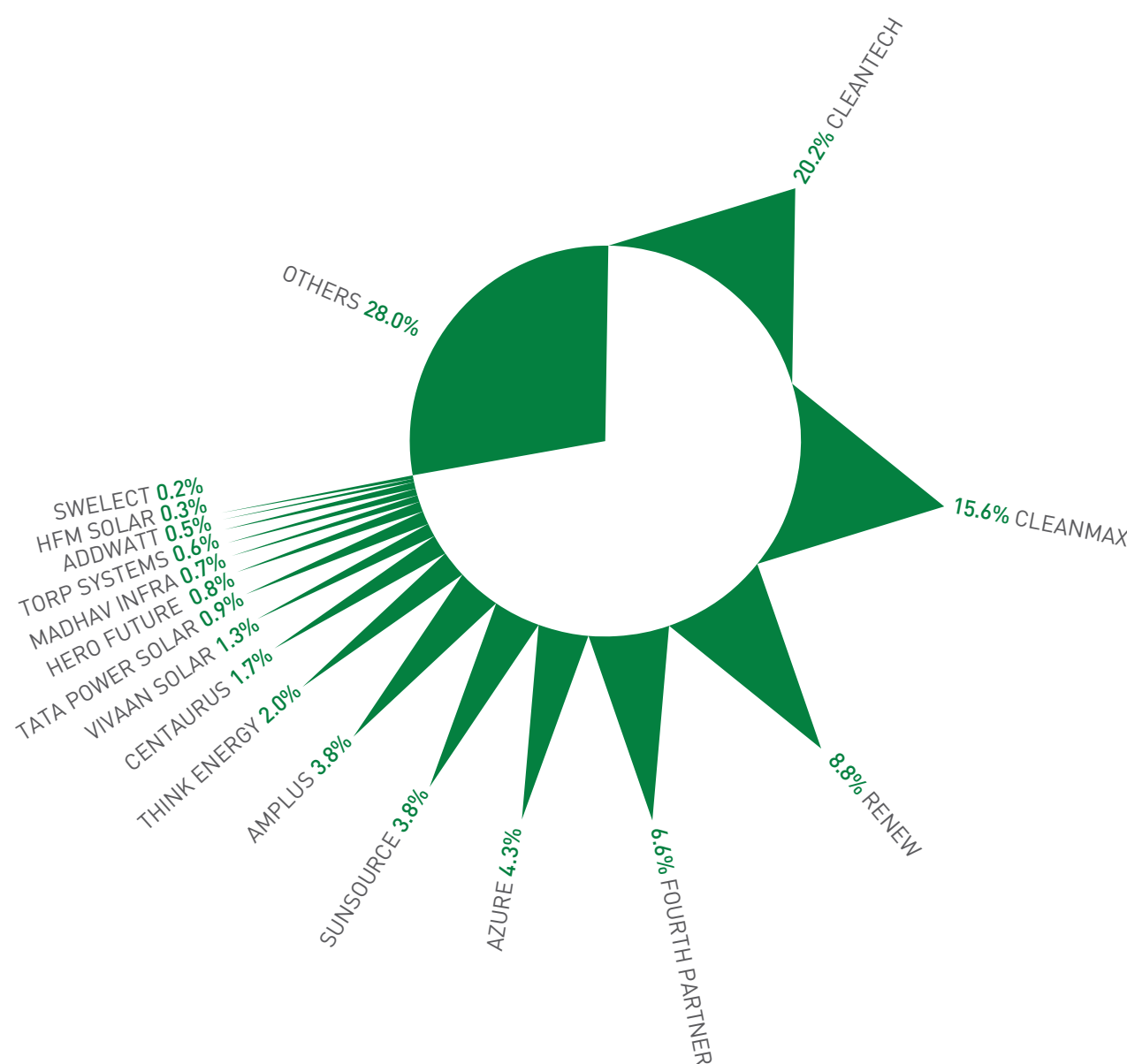
Inverter suppliers

Market size - 1,538 MW



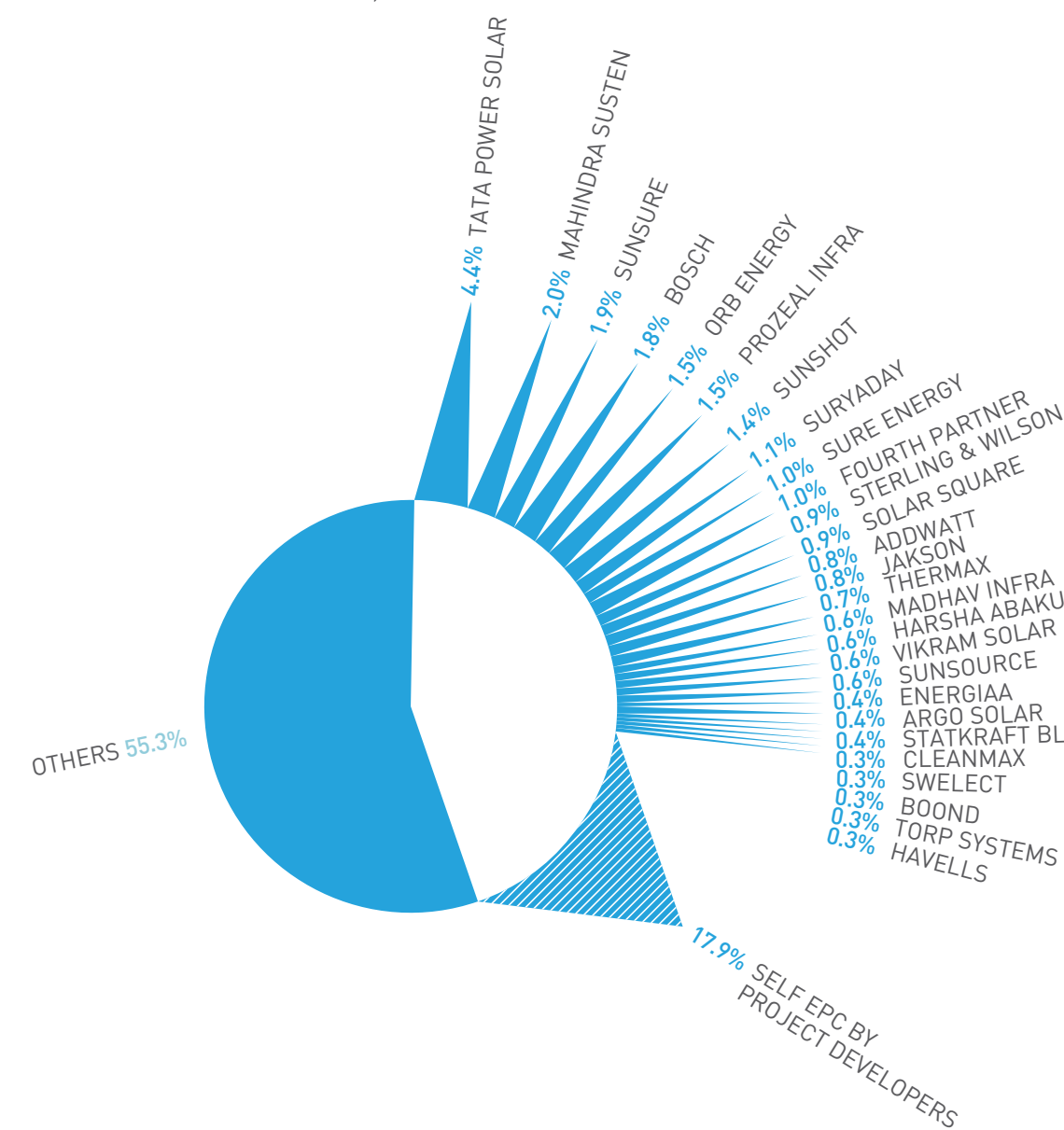
Project developers

Market size - 559 MW



EPC contractors

Market size - 1,538 MW



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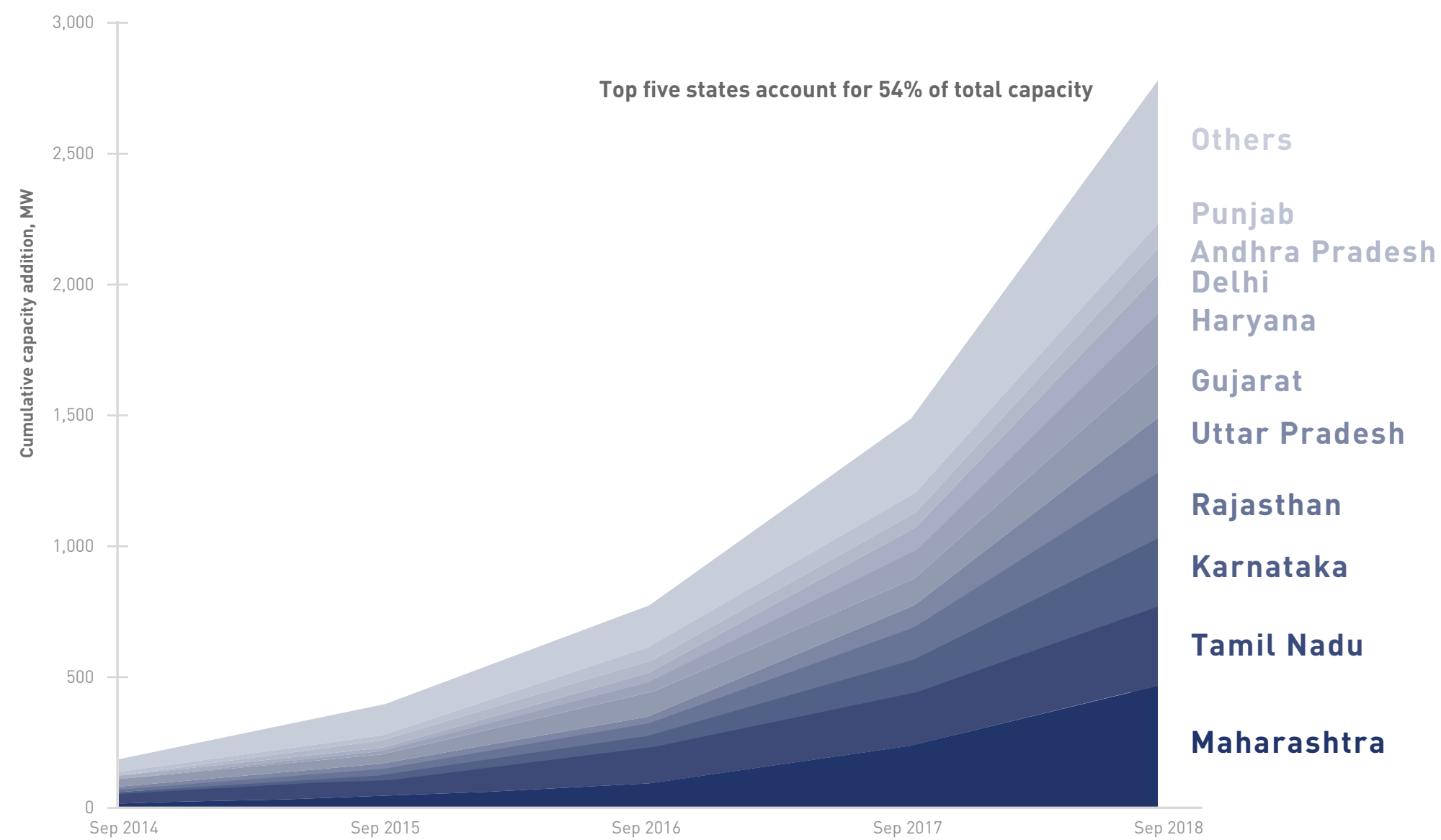
www.havells.com | For enquiry: Call or SMS rooftop to +91-9660308377 or email: solar@havells.com

Top 10 players

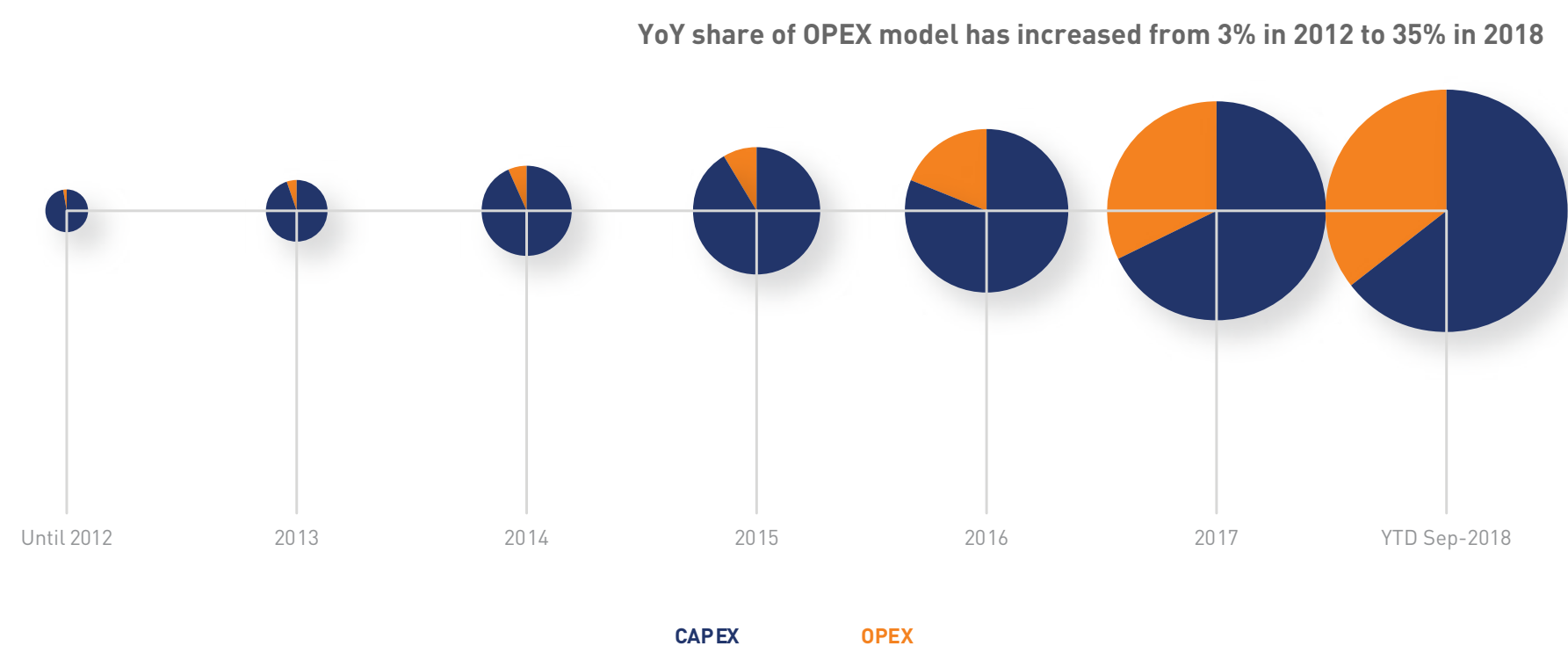
Capacity commissioned from Oct 2017 to Sep 2018

Inverter suppliers				Project developers			EPC contractors		
Current rank	Company Name	Previous year rank	Increase/Decrease	Company Name	Previous year rank	Increase/Decrease	Company Name	Previous year rank	Increase/Decrease
1	Delta	1	<>	Cleantech	2	▲	Tata Power Solar	1	<>
2	SMA	2	<>	CleanMax	1	▼	Mahindra Susten	-	▲
3	Solis	-	▲	ReNew	4	▲	Sunsure	-	▲
4	Sungrow	6	▲	Fourth Partner	-	▲	Bosch	7	▲
5	Goodwe	-	▲	Azure	5	<>	Orb Energy	-	▲
6	ABB	4	▼	SunSource	-	▲	Prozeal Infra	-	▲
7	K-star	-	▲	Amplus	3	▼	Sunshot	-	▲
8	Huawei	10	▲	Think Energy	-	▲	Suryaday	-	▲
9	Growatt	-	▲	Centaurus	-	▲	Sure	-	▲
10	SolarEdge	-	▲	Vivaan Solar	3	▲	Fourth Partner	2	▼

Capacity addition in key states⁴



CAPEX and OPEX model market share²



Notes:

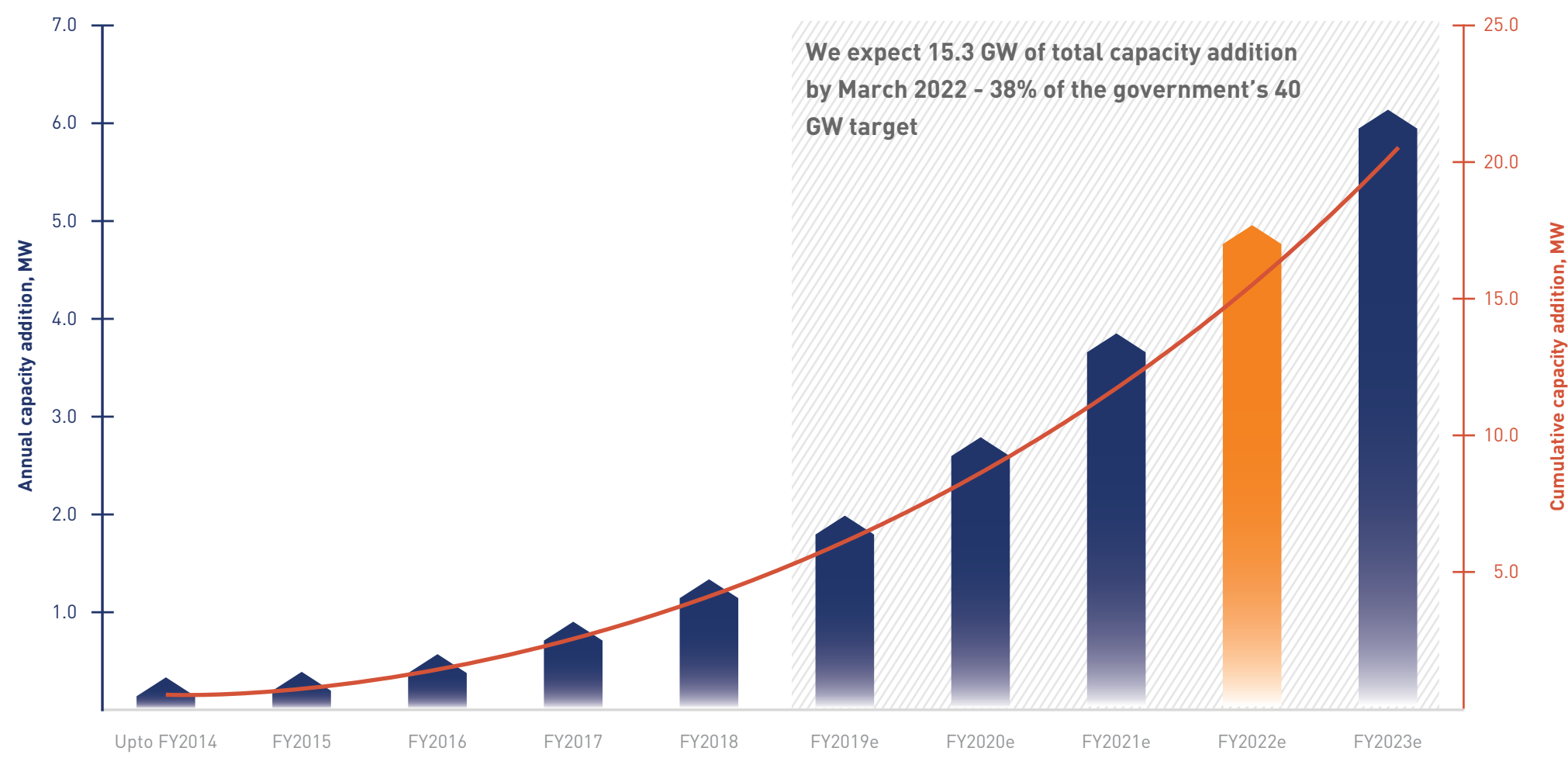
- Methodology
- BRIDGE TO INDIA has conducted an extensive data collection exercise and relied on multiple market sources including project developers, equipment suppliers and state nodal agencies to provide accurate, factual information as far as possible. Some suppliers were either unreachable or did 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 systems.
- OPEX model-based systems are owned and installed by third-party investors at consumer premises. CAPEX model involves consumers financing and owning the systems.
- Our projections are based on an internal model based on economic viability and grid connectivity as the primary drivers for rooftop solar adoption.
- This chart excludes residential consumer segment data.

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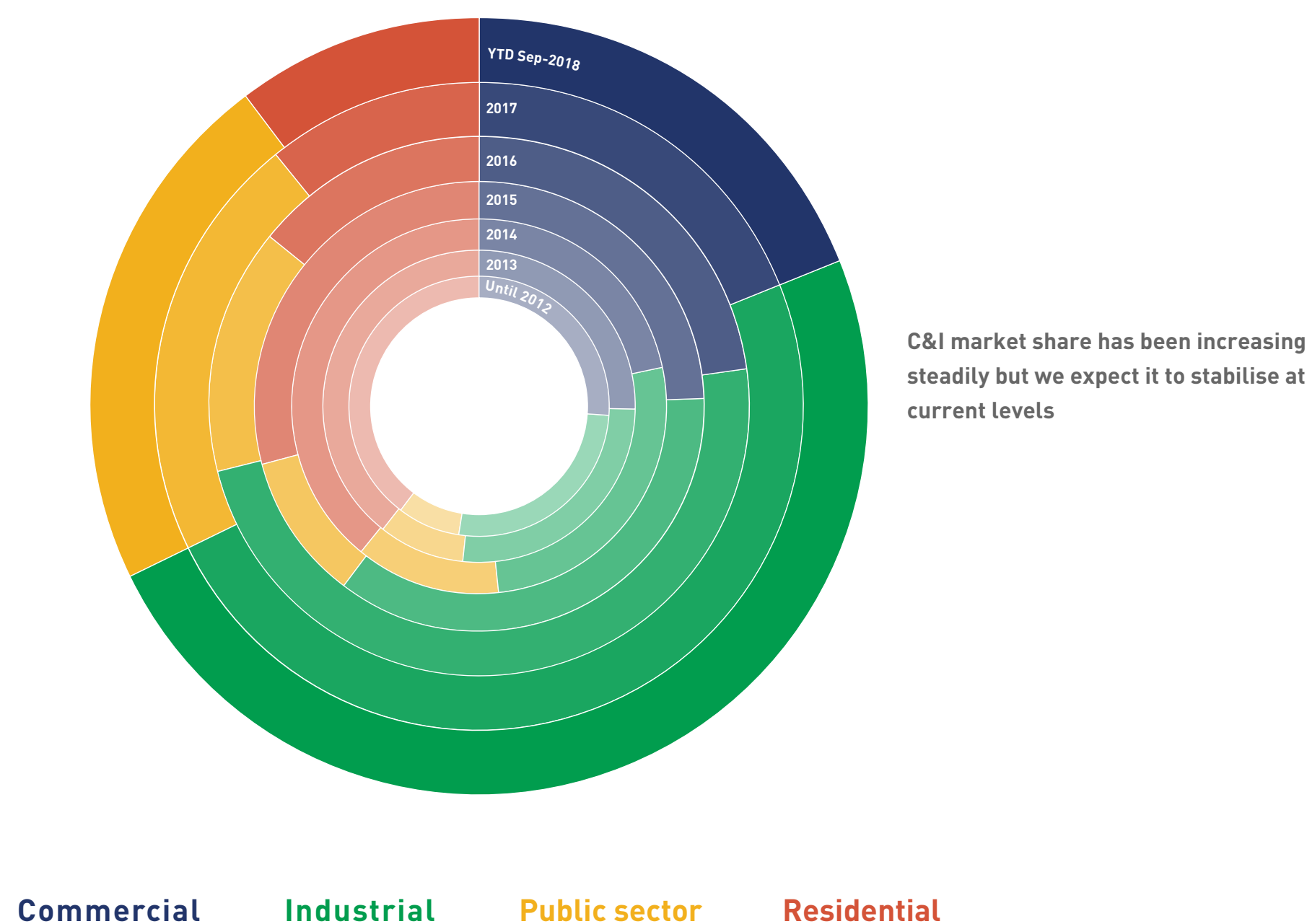


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Historic market growth and projections³



Share of different consumer segments in total capacity



INDIA SOLAR ROOFTOP MAP 2018 SEPTEMBER

Installed capacity as on September 30, 2018
3,399 MW



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