

Utility-scale solar praia

While world leaders were talking the talk in Abu Dhabi, some, at least, of their home countries were backing this up with action. Provisional figures show that 2023 set a new and massive record for utility-scale solar, doubling the previous best.

Large-scale solar installations have increased in almost every year of this century, reaching a record 75GWac of new capacity over 2022. Wiki-Solar's preliminary data suggest this has leapt to some 150GWac in 2023, taking cumulative operational capacity over 600GWac. If annual installs grow by a mere 7% per annum from here to 2030, this sector will treble, thereby meeting its COP28 target.

While Europe led the world in the first decade of this century, Asia has been the dominant continent since, spearheaded by China and India. One of the highlights of last year's results is the way other regions are starting to pull their weight.

North America showed the highest year-on-year growth, of around 150%, compared to about 100% for Asia. South America's 120% increase makes it a serious contributor, exceeding 6% of global new capacity in 2023.

While the heavy lifting continues to be done by the three top markets - China, the US and India - several other countries are now showing dynamic growth. Spain added 6GWac of new capacity to rocket to an uncontested fourth in the world ranking.

The US leapt back with a vengeance after its installs dipped in 2022, driving growth of 150% in North and Central America. It commissioned over 30GWac of new utility-scale solar capacity, comfortably more than double its previous record. Texas alone contributed over 7.5GWac.

Relatively little support came from other nations in the continent. Canada was once in the top ten, when Ontario was actively promoting renewables, but had fallen to 20th in the world two years ago. New projects, mainly in Alberta, have led to a slight resurgence. Mexico too reached the top ten between 2018-2020 after commissioning several large projects, but is now slipping back down the table.

South America saw an increase of 120%, as shown in the graph above, with Brazil installing 5GWac of new capacity - 40% of its cumulative total - in 2023, lifting it into the top 10 and placing it eighth in the world. It still has a pipeline of 20GWac of approved projects in construction and development, so plenty of scope for further growth. Co-leader of South America's surge, Chile has an even larger pipeline of 40GWac, though it has to date completed only one-third of the 20GWac pipeline it had four years ago.

Asia recorded a 100% increase, and China's impressive total may yet prove to be understated, if the as-yet-unpublished fourth quarter matches a massive Q3. India too accelerated progress in both its installed

capacity and pipeline. These Asian solar superpowers are steadfastly supported by Japan, continuing solid if undramatic progress, though its preliminary figures often prove to be understated.

Vietnamese installs have declined since its 2019 boom, while South Korea and Thailand are also slipping down the table. The Philippines, by contrast, is enjoying something of a resurgence.

Asia's figures are also bolstered by parts of the Middle East. The UAE has been climbing steadily for some years and Türkiye has been consistently in the top 20. They are joined by Saudi Arabia, which has now climbed into the top 30 for the first time thanks to a handful of mega-projects. But a number of sunny, spacious Middle Eastern nations are notable by their absence.

Europe saw a 75% growth in installed capacity, with Spain the only European country to see a step-change in growth rate, and this should continue at least in the near term thanks to a 10GWac pipeline.

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