

Saudi Arabia Concentrated Photovoltaic Market Segmented By Product (Reflectors and Refractors), By Concentration (High Concentration Photovoltaic and Low Concentration Photovoltaic), By Concentration (Commercial, Utilities and Others), By Region, and By Competition, 2018-2028F

Market Report | 2023-11-07 | 73 pages | TechSci Research

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Report description:

Saudi Arabia Concentrated Photovoltaic Market was valued at USD 125.71 million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 12.68% through 2028. The Saudi Arabian government has shown a robust dedication to the advancement of renewable energy, specifically CPV. Initiatives such as the National Renewable Energy Program (NREP) and the implementation of supportive policies, incentives, and regulations have fostered a conducive environment for the development of CPV projects.

Key Market Drivers

Government Support & Investment

The Saudi Arabia Concentrated Photovoltaic (CPV) market is poised for significant growth, driven primarily by the unwavering support and substantial investment from the Saudi Arabian government. Saudi Arabia has recognized the importance of renewable energy sources in reducing its dependence on fossil fuels and mitigating climate change. Consequently, the government has implemented several key initiatives to foster the growth of the CPV sector.

One of the most notable initiatives is the Saudi Vision 2030 plan, which delineates the country's ambitious goals for diversifying its economy and reducing its carbon footprint. As part of this vision, Saudi Arabia has set a target to generate 50% of its electricity from renewable sources by 2030, with CPV playing a pivotal role in achieving this objective. To support this vision, the government has created enticing incentives for CPV projects, including long-term power purchase agreements (PPAs), tax incentives, and access to land and infrastructure.

Moreover, the Saudi government has established the Renewable Energy Project Development Office (REPDO) to oversee the procurement of renewable energy projects, including CPV installations. REPDO has played a vital role in streamlining the bidding

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process, ensuring transparency, and facilitating foreign and domestic investment in CPV projects. These efforts have attracted global CPV technology providers and investors, thereby contributing to the growth of the market.

In addition to financial incentives, the government has also made substantial investments in research and development to promote technological advancements in CPV systems. Collaborations with international research institutions and partnerships with leading CPV companies have facilitated knowledge transfer and innovation, positioning Saudi Arabia as an emerging hub for CPV technology development.

The government's steadfast commitment to renewable energy, coupled with its substantial investment and support, serves as the primary catalyst behind the growth of the CPV market in Saudi Arabia. This driver not only stimulates the development of CPV projects but also contributes to the nation's broader sustainable development goals.

Abundant Solar Resources

Saudi Arabia possesses an abundance of sunlight, making it an ideal location for the growth of the Concentrated Photovoltaic (CPV) market. The country's strategic geographical position in the Middle East ensures a consistent supply of direct solar radiation throughout the year, presenting a substantial energy resource for CPV systems.

The expansive and uninhabited desert regions of Saudi Arabia offer vast areas of land with exceptional solar irradiance levels, making them highly suitable for large-scale CPV installations. This allows for efficient utilization of concentrated sunlight to generate electricity. With over 3,000 annual hours of sunshine, Saudi Arabia boasts one of the world's highest solar energy potentials, rendering CPV an attractive renewable energy solution.

The significant solar irradiance not only enhances the energy output of CPV systems but also contributes to their cost-effectiveness. CPV systems can achieve higher energy conversion efficiencies when exposed to direct sunlight, surpassing traditional photovoltaic technologies. This efficiency advantage makes CPV economically viable in Saudi Arabia, as it enables greater electricity generation per unit of installed capacity.

Furthermore, the consistent and predictable solar resource in Saudi Arabia reduces the variability associated with other renewable energy sources like wind and tidal power. This reliability is crucial for meeting the country's energy demands and stabilizing its electrical grid. As Saudi Arabia continues to diversify its energy mix and reduce its reliance on fossil fuels, the abundant solar resources serve as a compelling driver for the adoption and growth of CPV technology.

Environmental & Sustainability Goals

The global shift towards sustainable energy solutions and the urgent need to reduce greenhouse gas emissions have prompted Saudi Arabia to prioritize environmental and sustainability objectives. As part of its commitment to combat climate change and lower its carbon footprint, the country has embraced Concentrated Photovoltaic (CPV) as a clean and environmentally friendly energy source.

The alignment of CPV technology with the nation's sustainability goals is one of the key drivers behind the growth of the CPV market in Saudi Arabia. CPV systems generate electricity without emitting harmful greenhouse gases, making them an environmentally responsible choice for power generation. Saudi Arabia has set ambitious targets to reduce carbon emissions and actively seeks ways to transition from fossil fuels to renewable energy sources like CPV.

Furthermore, CPV systems have a smaller environmental footprint in terms of land use compared to other renewable energy technologies. The compact design and high energy output of CPV installations make them suitable for deployment in desert areas without significant disruption to local ecosystems. This minimal environmental impact aligns with Saudi Arabia's commitment to preserving its natural resources.

In addition, the adoption of CPV technology in Saudi Arabia contributes to the diversification of the country's energy mix, reducing its reliance on fossil fuels and enhancing energy security. This diversification is crucial for the long-term sustainability of the nation's energy sector, as it reduces vulnerability to fluctuations in global oil prices and supply disruptions.

In conclusion, the pursuit of environmental and sustainability objectives serves as a driving force behind the growth of the CPV market in Saudi Arabia. As the nation strives to transition to a more sustainable energy future, CPV technology emerges as a pivotal component of its clean energy strategy, offering both environmental benefits and long-term energy security.

Key Market Challenges

High Initial Costs & Financing Constraints

One of the primary challenges faced by the Saudi Arabia Concentrated Photovoltaic (CPV) market is the substantial initial capital

costs associated with CPV technology. While CPV systems offer superior efficiency in converting sunlight into electricity, their installation and maintenance expenses are comparatively higher than those of traditional photovoltaic (PV) systems. The CPV technology necessitates precise tracking mechanisms, concentrating optics, and sophisticated materials, all of which contribute to elevated upfront costs.

These higher capital costs can pose a significant barrier for investors and project developers, particularly in a market where cost-effectiveness is a critical consideration. Moreover, the financial challenges are compounded by the fact that CPV projects typically have longer payback periods compared to conventional PV projects. This extended timeline for achieving a return on investment can discourage potential investors and impede the growth of the CPV market.

To tackle this challenge, Saudi Arabia must develop innovative financing mechanisms and incentives that enhance the attractiveness of CPV projects to investors. This could entail providing low-interest loans, offering tax incentives, and establishing partnerships with international financial institutions to secure favorable financing terms. Additionally, fostering research and development efforts aimed at reducing the cost of CPV technology can help position it as a more financially viable option for the market.

Water & Cooling Requirements

One of the distinctive challenges facing the Saudi Arabia CPV market is the requirement for water for cooling purposes. CPV systems generate concentrated heat as they focus sunlight onto photovoltaic cells, which can result in overheating and reduced efficiency. To address this issue, cooling systems are commonly integrated into CPV installations to dissipate excess heat and maintain optimal operating temperatures.

In the arid climate of Saudi Arabia, water is a precious and scarce resource, and the demand for cooling water presents significant challenges. The extensive use of water for cooling can strain local water resources and raise sustainability concerns. Moreover, in some remote desert regions where CPV installations are ideal due to high solar irradiance, access to water for cooling can be even more limited.

Effectively tackling this challenge necessitates innovative cooling solutions that minimize water consumption. This may involve the development of advanced cooling technologies such as dry cooling or the utilization of treated and recycled water sources. Additionally, efficient water management strategies and stringent regulations on water use in CPV projects are imperative to ensure responsible water usage and minimize environmental impact.

Grid Integration & Infrastructure

The successful integration of CPV systems into the existing electrical grid presents a significant challenge for the Saudi Arabia CPV market. As the country aims to enhance its renewable energy capacity, it must ensure the reliable transmission and distribution of electricity generated by CPV installations to meet the growing energy demands.

This challenge encompasses two main aspects. Firstly, CPV projects are often situated in remote areas with limited grid infrastructure. The establishment of necessary transmission lines and substations to connect these projects to the grid can be a time-consuming and costly process. Secondly, the intermittent nature of solar power generation necessitates advanced energy storage solutions for effective grid integration, ensuring excess electricity can be stored and used during periods of low sunlight. To overcome these challenges, Saudi Arabia must prioritize grid infrastructure development and modernization, focusing on expanding the grid to reach CPV project sites. Additionally, implementing energy storage technologies such as advanced batteries or molten salt storage systems can help stabilize the grid and ensure a continuous power supply, even in unfavorable weather conditions.

In conclusion, the Saudi Arabia CPV market faces several challenges, including high initial costs, water and cooling requirements, and grid integration issues. Addressing these challenges will necessitate innovative financing approaches, sustainable cooling solutions, and substantial investments in grid infrastructure and energy storage technology. Overcoming these obstacles is crucial for the successful growth and sustainability of the CPV market in Saudi Arabia.

Key Market Trends

Technological Advancements and Efficiency Improvements

A prominent trend observed in the Saudi Arabia Concentrated Photovoltaic (CPV) market is the continual advancement of CPV technology and the pursuit of higher efficiency. As the CPV industry matures globally, research and development efforts are directed towards enhancing the performance of CPV systems. This trend is driven by the objective of maximizing energy yield and

reducing the cost of electricity generated by CPV.

One significant area of technological advancement pertains to the refinement of CPV tracking and concentrating optics. Innovations in tracking systems and optical components have resulted in greater accuracy in tracking the sun's movement and concentrating sunlight onto the photovoltaic cells. This, in turn, has led to increased energy capture and improved system efficiency. Furthermore, advancements in CPV module design and materials have contributed to enhanced resistance against environmental factors and extended operational lifespans.

The pursuit of higher CPV efficiency holds particular relevance in Saudi Arabia, where the abundance of sunlight provides a substantial resource for energy generation. By achieving higher efficiency, CPV systems can harness more energy from the intense Saudi Arabian sun, thereby making them even more appealing as a renewable energy source. As this trend continues, we can anticipate CPV projects in Saudi Arabia to deliver improved energy yields and become more competitive in the energy market.

Large-Scale CPV Installations and Utility-Scale Projects

Saudi Arabia is currently witnessing a notable shift towards the development of expansive CPV installations and utility-scale projects. With the aim to diversify its energy mix and decrease reliance on fossil fuels, CPV is emerging as a viable solution to meet the nation's increasing energy demands.

One of the key advantages of CPV technology lies in its scalability. CPV systems can be easily expanded to align with the energy requirements of large industrial or utility customers. This scalability is well-suited to Saudi Arabia's needs as the country strives to deploy substantial renewable energy capacity to support its industries and urban areas.

Utility-scale CPV projects offer multiple benefits, including economies of scale, efficient land utilization, and the ability to directly supply electricity to the grid. Saudi Arabia's steadfast commitment to renewable energy, coupled with the vast, sun-drenched areas in its desert regions, renders it an ideal location for such projects.

This trend towards larger CPV installations is in line with the ambitious goals outlined in Saudi Vision 2030, which aims to increase the share of renewable energy in the national energy mix. As more large-scale CPV projects are developed and become operational, they will play a crucial role in achieving these objectives and reducing greenhouse gas emissions.

Segmental Insights

Product Insights

The Refractors segment emerged as the dominant player in 2022. The concentrated photovoltaic (CPV) market in Saudi Arabia is experiencing significant growth, with refractors being a key segment in this market. Refractors play a critical role in CPV systems by focusing sunlight onto solar cells to optimize energy conversion. The refractors segment in the Saudi Arabian CPV market has shown substantial expansion in recent years. This can be attributed to the country's commitment to renewable energy sources and favorable climate conditions for solar power generation.

To reduce reliance on imports and boost the domestic CPV industry, Saudi Arabia has actively promoted local manufacturing of CPV components, including refractors. This approach has not only generated employment opportunities but also lowered installation costs for CPV systems.

The Saudi government has implemented various incentives and policies to drive the adoption of solar energy, including CPV systems. These initiatives encompass subsidies, tax incentives, and streamlined permitting processes, all of which have had a positive impact on the refractors segment.

With its vast desert expanses, Saudi Arabia presents immense potential for CPV installations, with refractors playing a pivotal role in harnessing this potential. As the country continues to diversify its energy sources away from fossil fuels, the refractors segment is expected to sustain its growth trajectory.

Application Insights

The Utilities segment is projected to experience rapid growth during the forecast period. In order to enhance cost-efficiency and stimulate the local economy, Saudi Arabia has actively promoted the domestic manufacturing of CPV components such as mirrors, concentrators, and trackers, which are vital to the utilities sector. This strategic initiative has not only reduced dependence on imports but has also generated employment opportunities within the country.

CPV technology is widely regarded as environmentally friendly, as it generates electricity without emitting greenhouse gases. This aligns with Saudi Arabia's commitment to reducing its carbon footprint and addressing environmental concerns, further bolstering the growth of the utilities segment.

The utilities segment of the Saudi Arabian CPV market holds significant potential for expansion, supported by the ongoing investments in renewable energy infrastructure made by the country. With advancements in technology and decreasing costs, CPV systems are expected to emerge as a highly competitive and reliable source of electricity for the nation.

In conclusion, the utilities segment of the Saudi Arabian CPV market is poised for substantial growth, driven by government support, escalating demand for renewable energy, and a focus on large-scale, utility-grade installations. As Saudi Arabia continues its transition toward a more sustainable and diversified energy landscape, the utilities segment is set to play a pivotal role in achieving these ambitious goals.

Regional Insights

Riyadh emerged as the dominant player in the Saudi Arabia Concentrated Photovoltaic market in 2022, holding the largest market share. Riyadh, the capital city of Saudi Arabia, is situated in a region renowned for its abundant solar resources. With ample sunlight year-round, Riyadh proves to be an optimal location for Concentrated Photovoltaic (CPV) installations. The high solar irradiance levels significantly enhance the efficiency and energy output of CPV systems, making it a favorable technology for adoption in Riyadh.

The Saudi Arabian government, aligned with broader national initiatives such as Saudi Vision 2030 and the National Renewable Energy Program (NREP), exhibits a strong commitment to renewable energy. Riyadh benefits from government support through various incentives, including long-term power purchase agreements (PPAs), attractive tariffs, and investment-friendly policies. These initiatives serve to encourage the development of CPV projects in the city.

As the economic and political hub of Saudi Arabia, Riyadh plays a crucial role in the country's pursuit of energy diversification. The city's escalating energy demands, driven by population growth and economic development, have intensified the focus on renewable energy sources like CPV. Riyadh's dedication to reducing its carbon footprint and dependence on fossil fuels aligns with the adoption of CPV technology.

Riyadh offers a promising investment environment for CPV projects, attracting both domestic and international investors due to the city's increasing demand for electricity and government incentives. Additionally, Riyadh's standing as a global financial and business center further enhances its appeal for investment in the CPV sector.

Similar to many urban centers worldwide, Riyadh grapples with environmental challenges such as air pollution and high energy consumption. The adoption of CPV technology can play a vital role in addressing these concerns by reducing greenhouse gas emissions and promoting clean energy generation.

In conclusion, Riyadh, as the capital of Saudi Arabia and a significant urban center, presents a promising environment for the growth of the Concentrated Photovoltaic market. Abundant solar resources, government support, energy diversification goals, technological advancements, and investment opportunities are key factors that contribute to the development of the CPV market in Riyadh. Addressing infrastructure needs and fostering a skilled workforce will be crucial for capitalizing on these opportunities and achieving Riyadh's sustainable energy objectives.

Key Market Players

Saudi Electricity Company

ACWA Power

National Grid SA

Diyar United Company

Energy Systems Co.

Abunayyan Holding

National Solar Systems (NSS)

Rafiki Power

Advanced Electronics Company

Alfanar Group

Report Scope:

In this report, the Saudi Arabia Concentrated Photovoltaic Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

□ Saudi Arabia Concentrated Photovoltaic Market, By Product:

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- o□Reflectors

- o□Refractors

- Saudi Arabia Concentrated Photovoltaic Market, By Product:

- o□High Concentration Photovoltaic

- o□Low Concentration Photovoltaic

- Saudi Arabia Concentrated Photovoltaic Market, By Application:

- o□Commercial

- o□Utilities

- o□Others

- Saudi Arabia Concentrated Photovoltaic Market, By Region:

- o□Riyadh

- o□Makkah

- o□Eastern Province

- o□Rest of Saudi Arabia

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Saudi Arabia Concentrated Photovoltaic Market.

Available Customizations:

Saudi Arabia Concentrated Photovoltaic Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

- Detailed analysis and profiling of additional market players (up to five).

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