

Italy Solar Energy - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Italy Solar Energy Market size in terms of installed base is expected to grow from 38.53 gigawatt in 2025 to 65.57 gigawatt by 2030, at a CAGR of 11.22% during the forecast period (2025-2030).

Key Highlights

- Over the medium period, supportive government policies to promote renewable power generation and the declining cost of Solar PV installations are expected to be some of the driving factors for the solar energy market in Italy during the forecast period.
- On the other hand, the increasing adoption of alternate renewable sources such as wind and limited grid infrastructure and storage systems are expected to hinder the market growth during the forecast period.
- Nevertheless, offshore areas for solar installation are expected to provide ample opportunities for market players in the future.

Italy Solar Energy Market Trends

Solar Photovoltaic (PV) Segment to Dominate the Market

- Photovoltaics (PVs) are arrays of cells containing solar photovoltaic material that converts radiation or energy from the sun into direct current electricity. They consist of various semiconductors, usually silicon, and highly conductive wire to reduce any current loss, making them expensive. However, low operational costs are expected to further lower the costs in the coming years.
- The growth of the on-grid solar PV market is also likely to accelerate due to the government's favorable initiatives to boost its adoption. For instance, in early 2022, the Italian government launched new provisions in the DL Energia decree to decrease

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energy bills for households and businesses. Italian companies can now secure project rebates, and several southern regions have also been granted a fiscal break for rooftop solar PV and energy efficiency.

- The new provisions published by the government include an extreme simplification of permits to install commercial rooftop PV systems with a capacity of between 50 kW and 200 kW. In Italy, these systems are allowed to operate under the country's net metering scheme, known as Scambio sul posto.
- In May 2022, the European Commission announced a mandate for rooftop solar on commercial and public buildings by 2027 and for residential buildings by 2029. In addition, the EU target for renewable energy increased from 40% to 45%. Such mandates are anticipated to push the adoption of Italy's on-grid solar PV market in the coming years.
- The Italian government has also planned to significantly increase the installed solar PV capacity by up to about 60 GW to produce more than 72 TWh to 74 TWh of electricity by the end of 2030. In early 2023, the Italian Energy and Environment Ministry announced that it aims to add at least 70 GW of renewable energy capacity by 2030. These targets are expected to result in significant growth in deploying new solar PV plants, especially utility-scale sized PV plants.
- According to the International Renewable Energy Agency (IRENA), in 2022, the Solar Energy Installed Capacity increased by 10.97 % compared to 2021; the increase is due to new projects started in the past year. This number is likely to increase in the upcoming years during the forecast period.
- Thus, with such ongoing developments and capacity additions supported by favorable government policies, the solar PV segment is expected to dominate the market during the forecast period.

Upcoming Projects and Government Policies Expected to Drive the Market

- Italy is a prominent consumer of solar electricity worldwide and a significant contributor to the growth of solar energy capacity worldwide. The country's market for solar energy capacity additions is one of the largest globally. Within the European Union, Italy is ranked second, just behind Germany, in terms of its photovoltaic sector.
- The Italian government is promoting solar energy for several reasons. Firstly, it is committed to reducing the country's dependence on fossil fuels and increasing its share of renewable energy in the energy mix. This aligns with Italy's national energy and climate plans, which aim to achieve a 45% share of renewable energy in gross final energy consumption by 2030.
- In February 2023, the Energy and Environment Ministry of Italy announced that the government plans to add a minimum of 70 GW of renewable energy capacity to the national grid by 2030. To achieve this goal, the government is developing a decree to expedite the permit process for renewable energy projects.
- For instance, in March 2022, the Italian government released a new package of measures in the DL Energia decree. One of the new provisions includes a significant simplification of the permit process for installing commercial rooftop photovoltaic (PV) systems with a capacity ranging from 50 kW to 200 kW. These systems are eligible to participate in Italy's net metering scheme, which is known as the "Scambio sul posto."
- According to the International Renewable Energy Agency (IRENA), in 2022, the Renewable Energy Capacity increased by 5.33 % compared to 2021; the increase is due to new projects started and Supportive Government Policies implemented in the region during the past year. This number is likely to increase in the upcoming years during the forecast period.
- According to the Relazione annuale situazione energetica nazionale dati 2021, a report published by the Ministry of Environment and Energy Security in 2021, after seven years of reduced growth, there was an increase (+3%) in the solar energy market with 21 GW of additional capacity. Italy witnessed the greatest trend, with an increase of 83%, owing to the incentives provided by the super bonus mechanism.
- These actions from the Italian government have also been reflected in a significant increase in electricity generation through solar energy sources. For instance, in 2022, the total electricity generation through solar energy was recorded at 27.55 GWh, which was an increase of more than 24.6% compared to 2016. Furthermore, with plans to install more than 70 GW of renewable energy by 2030, the installation of solar energy is further expected to increase in the future.
- Therefore, the solar energy market is expected to grow significantly during the forecast period, owing to the ambitious

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renewable energy targets and supportive government initiatives, such as tax credits, net metering, and investments in solar energy sectors.

Italy Solar Energy Industry Overview

The Italian solar energy market is fragmented. Some of the major companies include Gruppo STG SRL, Sonnedix Power Holdings Ltd, EF Solare Italia SpA, SunPower Corporation, and Enel SpA (in no particular order).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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