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ANMD-MRS8-076

BIFACIAL SOLAR MODULES

A Global Sustainability Due Diligence and Market Research Study

Shortened Table of Contents

Market Snapshot

US$ 48,000.0m 2025A market value	**US$ 47,040.0m** 2026E market value	**US$ 78,090.0m** 2032F forecast	**8.8%** CAGR 2026E to 2032F
7 regions Geographic coverage	**23 + 7** Country and residual modules	**1,319 exhibits** Including 258 charts	**293 + 107** Organizations and patent records
2020–2032 Historical data and forecasts	**Global** Regional and country coverage		

Report Facts

Report Attribute	Coverage
Report code	ANMD-MRS8-076 | Advanced Solar & Wind Technologies
Published	September 2026
Study periods	History 2020H to 2024H | Actual 2025A | Estimate 2026E | Forecast 2027F to 2032F
Length	845 pages | 34 chapters | 7 appendices | 1,319 exhibits including 258 charts
Geography	7 regions | 23 country modules | 7 residual modules
Segmentation	4 headline constructions plus cell technology, application, end user, business model, scale and glass configuration
Directories	293 organizations based in 28 countries and territories | 107 patent records in 10 jurisdictions
Licences	Single-User License (SUL) | Global Corporate License (GCL)

This shortened table of contents presents the chapter architecture, main sections and selected exhibits. The detailed table of contents and sample pages are available to registered users at www.anewmarketdynamics.com.

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Part I

Study Framework, Executive Brief and Global Market

Study conventions, headline market findings, the module-sale market boundary and the global and regional analytical foundation.

No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
F	**Foreword** Purpose of the study • Module-sale market boundary • Intended readers		
1	**About This Report** Methodology and quality control • Report organization and reader's guide • Reporting conventions • Scope, inclusion and exclusion rules • Asset boundary from materials to end-of-life • Units, data quality and double-count controls **Selected exhibits** *Exhibit 1: Market Estimation Stages and Quality Controls | Exhibit 5: Inclusion and Exclusion Boundary for Bifacial Module Value*	12	**1**
2	**Executive Market Brief** Key market developments • Market in brief • Market outlook in five statements • Regional and country market outlook • Policy and classification environment • Key findings, risks and stakeholder implications • Indicators, timeline and market signals **Selected exhibits** *Exhibit 14: Headline Market KPI Dashboard, 2025A, 2026E and 2032F | Exhibit 19: Key Market Findings*	12 1 chart	**10**
3	**Executive Summary and Market Metrics Dashboard** What changed this year • What the market is worth and why • Regional and country opportunity ranking • Policy and classification outlook • Risk concentration • Observed deployment outcome patterns • KPI dashboard **Selected exhibits** *Exhibit 25: What Changed Between 2025A and 2026E | Exhibit 34: ANMD Regional Opportunity Scores for Bifacial Modules (Chart)*	19 5 charts	**19**
4	**Global Market — Dynamics, Size and Outlook** Industry background and classification • Industry structure and participant map • Market drivers • Market restraints and challenges • Opportunities and strategic frameworks • Global market size and forecast • Market model conversion logic • Module boundary and deployment pathways **Selected exhibits** *Exhibit 44: Typical Bifaciality and Rear-Side Character by Cell Architecture | Exhibit 46: Construction Families, Typical Uses and Application Logic*	64 6 charts	**29**
5	**Regional Markets — Seven-region Overview** Regional dashboard • Value and share comparison • Regional demand character • Regional opportunity ranking • Evidence-priority map **Selected exhibits** *Exhibit 112: Regional Share of Global Bifacial Module Value, 2020H–2032F (%) (Chart) | Exhibit 115: Regional Demand Character Profile*	14 4 charts	**72**
6	**How to Read the Country Modules** Module structure and conventions • Full-format and consolidated modules • Data bases and rounding • Participant, program and patent coverage **Selected exhibits** *Exhibit 122: Country Module Anatomy | Exhibit 123: Country Module Register and Tier Assignment*	5	**80**

Part II

Regional, Country, Segmentation and Demand Analysis

Seven-region coverage, 23 country modules and 7 residual modules, the master series, segmentation and demand signals.

No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
7	**North America — Regional Analysis and Country Modules** United States • Canada • Mexico • Rest of North America • Country comparison **Highlights** *Value, volume and construction series for each country module | Policy, program and grid-regulatory matrices for the United States, Canada and Mexico*	86 22 charts	**85**
8	**Europe — Regional Analysis and Country Modules** Germany • Spain • Netherlands • France • Nordics • Rest of Europe • Country comparison **Highlights** *Value, volume and construction series for five country modules | Policy matrices and deep dives for Germany, Spain, the Netherlands, France and the Nordics*	134 34 charts	**131**
9	**Asia Pacific — Regional Analysis and Country Modules** China • India • Australia • Japan • Southeast Asia • Rest of Asia Pacific • Country comparison **Highlights** *Value, volume and construction series for five country modules | Policy matrices covering market-based pricing in China and the ALMM lists in India*	134 34 charts	**202**
10	**Latin America — Regional Analysis and Country Modules** Chile • Brazil • Argentina • Colombia • Rest of Latin America • Country comparison **Highlights** *Value, volume and construction series for four country modules | Policy, program and grid-regulatory matrices for each country module*	110 28 charts	**274**

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No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
11	**Africa — Regional Analysis and Country Modules** South Africa • Egypt • Morocco • Rest of Africa • Country comparison **Highlights** *Value, volume and construction series for three country modules | Utility procurement, wheeling and solar-plus-storage programs*	86 22 charts	**331**
12	**Middle East — Regional Analysis and Country Modules** United Arab Emirates • Saudi Arabia • Israel • Rest of Middle East • Country comparison **Highlights** *Value, volume and construction series for three country modules | Gigawatt procurement rounds and round-the-clock solar programs*	86 22 charts	**374**
13	**Rest of World — Regional Analysis and Country Modules** Regional overview • Composition and market character • Value and outlook **Selected exhibits** *Exhibit 763: Rest of World Sub-regional Profile | Exhibit 765: Rest of World Market Composition by Country*	9 2 charts	**419**
14	**Global Market Reporting — Master Series and Reference Tables** Global master series • Regional master series • Country reference tables **Selected exhibits** *Exhibit 772: Global Bifacial Module Market Value and Volume, 2020H–2032F (US$ Million and GW) (Chart) | Exhibit 775: Global Glass Configuration Mix, 2026E Value Share (Chart)*	15 5 charts	**425**
15	**Global Segmentation Analysis** Headline construction, the primary market split • Cell technology, application, end user, business model and scale • Overlay axes • Full annual segment series • Cross-tabulation and additivity rules **Selected exhibits** *Exhibit 790: Global Headline Construction Mix, 2026E Value Share (Chart) | Exhibit 796: Secondary Cut Definitions*	43 9 charts	**432**
16	**Demand Signals and Forward Indicators** Structural demand signals • Gulf and desert deployment rounds • Economic and adoption signals • Indicator dashboard • Leading indicators **Selected exhibits** *Exhibit 833: Gulf and Desert Deployment Rounds — Capacity, Status and Bifacial Specification | Exhibit 840: Bifacial Module Indicator Dashboard — September 2026*	12 3 charts	**450**
17	**Adjacent-market Enablers** Adjacent enabler map and interfaces • Enabling infrastructure and platforms • Financing and service enablers • Controls, grid, storage and O&M interfaces **Selected exhibits** *Exhibit 845: Tracker Platforms and Bifacial Design Features | Exhibit 847: Engineering Interfaces That Determine Bifacial Yield*	6 1 chart	**460**

Part III

Competition, Engineering, Innovation, Sustainability and Policy

Competitive structure and company profiles alongside engineering, innovation, sustainability due diligence, supply chains and regulatory frameworks.

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19	**Competitive Environment — Structure, Rankings and Matrices** Market structure and concentration • Participant presence rankings • Capability matrices • Competitive outlook • Capacity, localization and supply-security benchmark **Selected exhibits** *Exhibit 883: Structural Features of Bifacial Module Competition, 2026 | Exhibit 888: Expected Competitive Shifts in Bifacial Modules, 2026E–2032F*	9 2 charts	**499**
20	**Mergers, Acquisitions, Partnerships and Industry Network Analysis** M&A record • Partnership and alliance patterns • Industry network reading • Joint-venture, offtake, OEM, recycling and localization network map **Selected exhibits** *Exhibit 890: Bifacial Module and Adjacent M&A Record, 2021–2026 | Exhibit 893: Partnership and Alliance Patterns in the Bifacial Chain*	7 1 chart	**508**
21	**Product, Module Engineering and Innovation** Module configuration comparison • Standards and design-code frame • Site and resource fit screening tool • Materials, durability and circularity • Innovation frontier • Emerging and next-generation technology • Component and albedo validation **Selected exhibits** *Exhibit 899: Bifacial Module Configuration Comparison by Headline Construction | Exhibit 902: Bifacial Measurement Parameters Defined in IEC TS 60904-1-2*	56 4 charts	**515**
22	**Research, Innovation and Funding Environment** Public research programs • Startup and venture activity • Standards and testing infrastructure • R&D, pilot-to-commercial and public funding pipeline **Selected exhibits** *Exhibit 953: Public Research Institutions and Their Bifacial Programs | Exhibit 960: Public Funding Pipeline for Bifacial Technology*	8 1 chart	**552**

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24	**Value Chain, Supply Chain and Geopolitical Analysis** Value-chain map • Silicon, glass, aluminum and polymer inputs • Components and electronics • Manufacturing and delivery footprints • Trade measures and localization • Logistics and delivery capacity **Selected exhibits** *Exhibit 1160: Value-Chain Stage Map for Bifacial Modules* | *Exhibit 1168: China Share by Manufacturing Stage and Main Diversification Hubs*	25 3 charts	**676**
25	**Policy, Regulation, Legal Structures and Integrated Risk** Energy-market and grid-regulatory frameworks • Subsidy and program architecture by jurisdiction • Standards and certification • Legal structures for delivery • Integrated policy risk reading • Measurement, land, grid, procurement and recycling obligations **Selected exhibits** *Exhibit 1186: US Solar Tax Credit Timeline after the 2025 Reconciliation Law* | *Exhibit 1187: Program Architecture by Jurisdiction*	18 2 charts	**693**

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Risk, Economics, Implementation and Outlook

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29	**Observed Implementation Patterns by Stakeholder** Manufacturers and providers • Distributors, integrators and installers • End users and buyer organizations • Governments and programs • Financiers and insurers • Project life-cycle patterns **Selected exhibits** *Exhibit 1229: End-User Groups and Their Bifacial Procurement Patterns* | *Exhibit 1231: Financier and Insurer Treatment of Bifacial Module Risk*	10 2 charts	**730**
30	**Community Engagement and Social Inclusion** Access and inclusion models • Gender and labor dimensions • Benefit-sharing patterns • Land, worker-safety, employment and just-transition outcomes **Selected exhibits** *Exhibit 1235: Access and Inclusion Models Using Bifacial Modules* | *Exhibit 1237: Benefit-Sharing Mechanisms Relevant to Bifacial Projects*	6 1 chart	**738**
31	**Pricing, Module Economics and Financing** Module cost structure • Buyer economics and payback • Financing context and instruments • Total cost of ownership, rear-side yield and project economics **Selected exhibits** *Exhibit 1243: Bifacial Price Premium Against Monofacial Equivalents by Product Class, 2026* | *Exhibit 1246: Illustrative Utility Project Economics by Configuration (ANMD Illustrative Ranges)*	14 2 charts	**743**
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