

# Solar Tracking Systems

ANMD-MRS8-077 · Advanced Energy Technologies

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

## WHY THIS REPORT

Solar tracking systems tilt PV modules to follow the sun, lifting energy yield by 15-25% over fixed-tilt mounting and forming the bankable backbone of utility-scale solar. This decision-grade study sizes the global market three ways — value, tracked capacity and trackers shipped — across tracker type, drive architecture and application, across seven regions and four scenarios to 2032, with outlooks to 2050.

## SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Solar tracking systems deliver measurable higher capacity factor, better land use and superior project economics, while pairing with bifacial modules strengthens the energy-transition story.

Mapped Sustainable Development Goals:

<b>SDG 7</b> Affordable Clean Energy	<b>SDG 9</b> Industry & Innovation	<b>SDG 11</b> Sustainable Cities	<b>SDG 12</b> Responsible Consumption	<b>SDG 13</b> Climate Action
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Measurable sustainability outcomes assessed:

- Higher capacity factor (15-25% yield gain)
- Better land use and project economics
- Strong synergy with bifacial modules
- Steel/material sourcing, embodied carbon and end-of-life as material risks

**Framework alignment:** Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

## WHAT'S INSIDE AT A GLANCE

<b>53</b> Chapters	<b>9</b> Report Parts	<b>7</b> Regions Covered	<b>40+</b> Country Markets
<b>2025–32</b> Forecast Horizon	<b>4</b> Forward Scenarios	<b>25+</b> Companies Profiled	<b>5</b> SDGs Mapped

## REPORT COVERAGE

**Geographic scope:** North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. Asia Pacific is the scale engine (China, India, Japan) on manufacturing and deployment; Europe leads on technology and demand (Germany, Spain, Netherlands); North America is the value leader (United States, Canada) on IRA support; other regions assessed on their own merits.

## MARKET OVERVIEW

### From yield add-on to utility-scale standard — where trackers go single-axis, terrain-following and AI-optimised.

Solar trackers are moving from a yield add-on to the utility-scale standard. Demand is driven by bifacial pairing, falling tracker costs and large ground-mount pipelines across North America, Asia Pacific and Europe. The market is read three ways — value, tracked capacity and trackers shipped — and forecast under four scenarios, each region reported separately.

- **North America is the value leader** — United States, on large ground-mount pipelines and tracker leadership
- **Asia Pacific is the scale engine** — China and India, on utility-scale deployment and volume
- **Europe is the demand leader** — Spain and Italy, on tracker-paired ground-mount
- **Intelligence is the differentiator** — terrain-following and AI-optimised control plus bifacial pairing

## REGIONAL OUTLOOK

Across seven reporting regions, the report separates early commercialisation leaders from high-growth and emerging markets — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
Asia Pacific	Scale engine	China, India, Japan — manufacturing, deployment
Europe	Technology / demand leader	Germany, Spain, Netherlands — deployment, policy
North America	Value leader	United States, Canada — IRA support, premium pricing
Middle East	High-growth	Saudi Arabia, UAE — utility-scale solar investment
Latin America	Emerging	Brazil, Chile — renewable-energy expansion
Africa	Emerging	South Africa, Egypt — clean-energy access, build-out

## KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
<ul style="list-style-type: none"> <li>• Bifacial-pairing + ground-mount convergence</li> <li>• Capacity-factor &amp; land-use value</li> <li>• Policy support (IRA, EU targets, India pipelines)</li> <li>• Falling tracker-cost momentum</li> <li>• Terrain-following, self-powered &amp; AI-control gains</li> </ul>	<ul style="list-style-type: none"> <li>• Steel &amp; component input-cost volatility</li> <li>• Terrain, wind-load &amp; site-complexity constraints</li> <li>• O&amp;M, reliability &amp; moving-part exposure</li> <li>• Supply-chain &amp; logistics localisation</li> <li>• Grid-interconnection &amp; permitting bottlenecks</li> </ul>

## SEGMENTATION SNAPSHOT

<b>By Tracker Type</b>	Horizontal single-axis (HSAT) · single-axis · dual-axis · terrain-following · smart / AI
<b>By Drive Architecture</b>	Distributed-drive · centralised-drive · self-powered
<b>By Application</b>	Utility-scale · commercial & industrial · distributed ground-mount
<b>By End User</b>	IPPs · utilities · EPCs · solar developers
<b>By Business Model</b>	Tracker sales · OEM supply · O&M & software service
<b>By Scale</b>	Distributed · commercial · utility-scale

## TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

### Part I — Report Foundation, Discovery and Strategic Intelligence

- › Chapter 1. Scope, Methodology and Report Architecture
- › Chapter 2. Industry Discovery Summary — Solar Tracking Systems
- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

### Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- › Chapter 5. Industry Overview and Market Evolution
- › Chapter 6. Market Dynamics
- › Chapter 7. Global Market Size and Forecast, 2020–2032
- › Chapter 8. Market Segmentation Analysis
- › Chapter 9. End-User and Demand-Side Intelligence
- › Chapter 10. Pricing, Cost and Commercial Model Intelligence

### Part III — Regional and Country Intelligence

- › Chapter 11. Global Regional Intelligence Framework
- › Chapter 12. North America Market Intelligence
- › Chapter 13. Europe Market Intelligence
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- › Chapter 18. Rest of World Market Intelligence

### Part IV — Technology, Innovation and Category-Specific Intelligence

- › Chapter 19. Technology Landscape and Architecture
- › Chapter 20. Emerging and Next-Generation Technology Intelligence
- › Chapter 21. Category-Specific Intelligence Module
- › Chapter 22. Research, Innovation and Funding Landscape

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- › Chapter 23. Competitive Landscape
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- › Chapter 27. Project, Deployment and Case-Study Intelligence

## Part VI — Sustainability, ESG, SDG, Climate and Natural-Capital Intelligence

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## Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

- › Chapter 42. Scenario Analysis and Future Intelligence
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- › Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
- › Chapter 45. Bottom-Line Verdict and Strategic Recommendations
- › Chapter 46. Implementation Roadmap and Stakeholder Playbooks

## Part IX — Annexes, Directories and Reference Material

- › Chapter 47. Methodology Annex
- › Chapter 48. Corporate Directory and Company Intelligence Annex
- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › Chapter 50. Project Intelligence Annex
- › Chapter 51. Forecast Annex
- › Chapter 52. Sustainability KPI Annex
- › Chapter 53. Reference Annexes

## COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans global clean-energy majors, specialist solar tracking systems makers, and emerging innovators. Deal activity — M&A, technology acquisition and platform expansion — signals a market consolidating around scalable, scale, efficiency and bankability.

### Representative players profiled in the full report:

Nexttracker Inc. · Array Technologies, Inc. · Soltec Power Holdings, S.A. · PV Hardware Solutions, S.L.U. (PVH) · Arctech Solar Holding Co., Ltd. · and 20+ further profiled players across manufacturers, developers and emerging innovators.

**Investment intelligence:** venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a Go / No-Go / Conditional-Go investment verdict.

## KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global solar tracking systems market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? How do efficiency, yield and bankability change project economics versus incumbent technology?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the category align with the SDGs, energy-access and just-transition and disclosure regulation?

## WHY ANMD — THE DIFFERENCE

*Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability verdict in a single architecture.*

- **Triangulated sizing** — every market read three ways so value, volume and capacity views reconcile rather than conflict.
- **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear Go / No-Go / Conditional-Go investment verdict.

## WHO SHOULD BUY THIS REPORT

Investors and infrastructure / PE funds, IPPs, utilities and EPC contractors, manufacturers and OEMs, project developers and asset owners, off-takers and corporate buyers, regulators, policymakers and lenders, and corporate strategy and ESG teams.

### Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at [www.anewmarketdynamics.com](http://www.anewmarketdynamics.com) · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

### Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at [www.anewmarketdynamics.com](http://www.anewmarketdynamics.com). The full detailed table of contents will be sent directly to your registered company email address.