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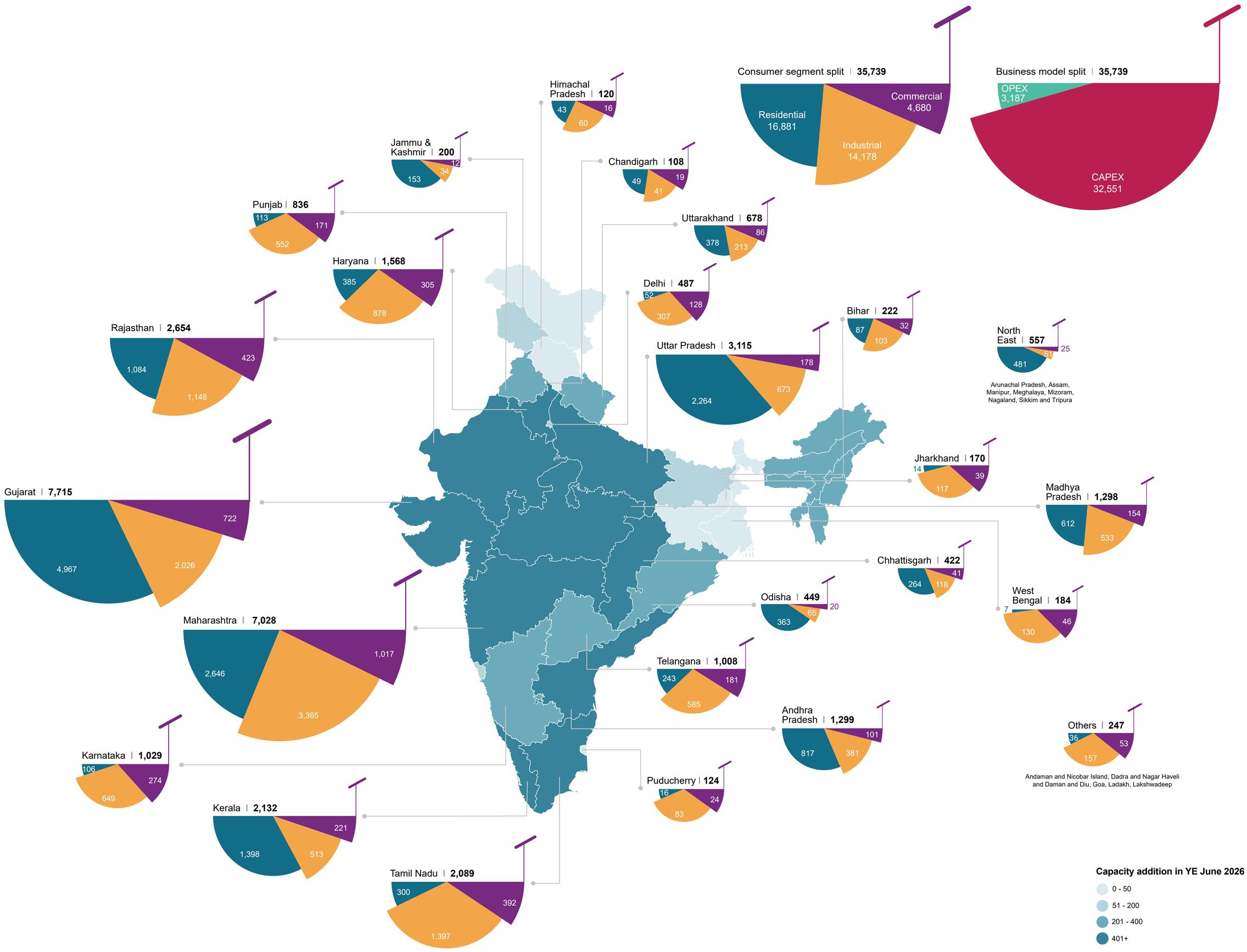
INDIA SOLAR **ROOFTOP MAP** JUN 2026

Total installed capacity, MW[1,2,3]

as on 30 June 2026



Annual market share[1]

Capacity installed in YE June 2026 (13,261 MW)

Inverter suppliers[4]

Market size - 13,261 MW

EPC contractors[5]

Market size - 13,261 MW

Project developers

Market size - 300 MW

*represents players with capacity installed only under PM Surya Ghar scheme

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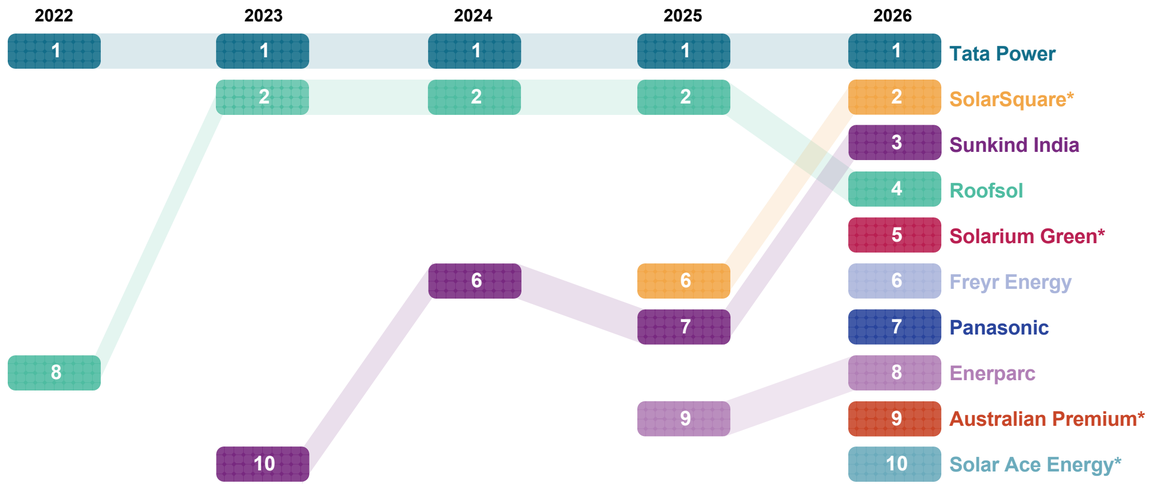
INDIA SOLAR **ROOFTOP MAP** JUN 2026

Top 10 EPC contractors

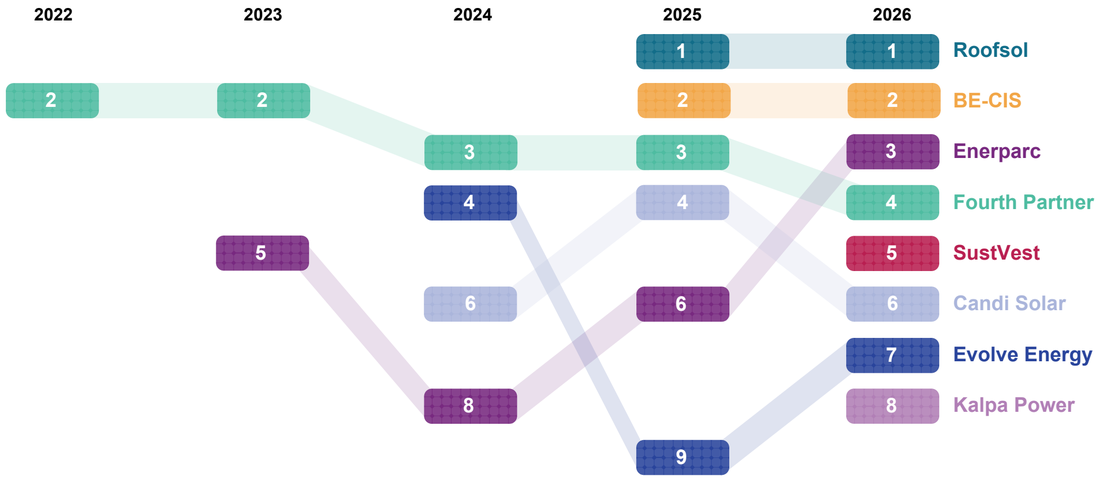
Rankings by capacity installed in the 12-month period ended June 2026



*represents players with capacity installed only under PM Surya Ghar scheme

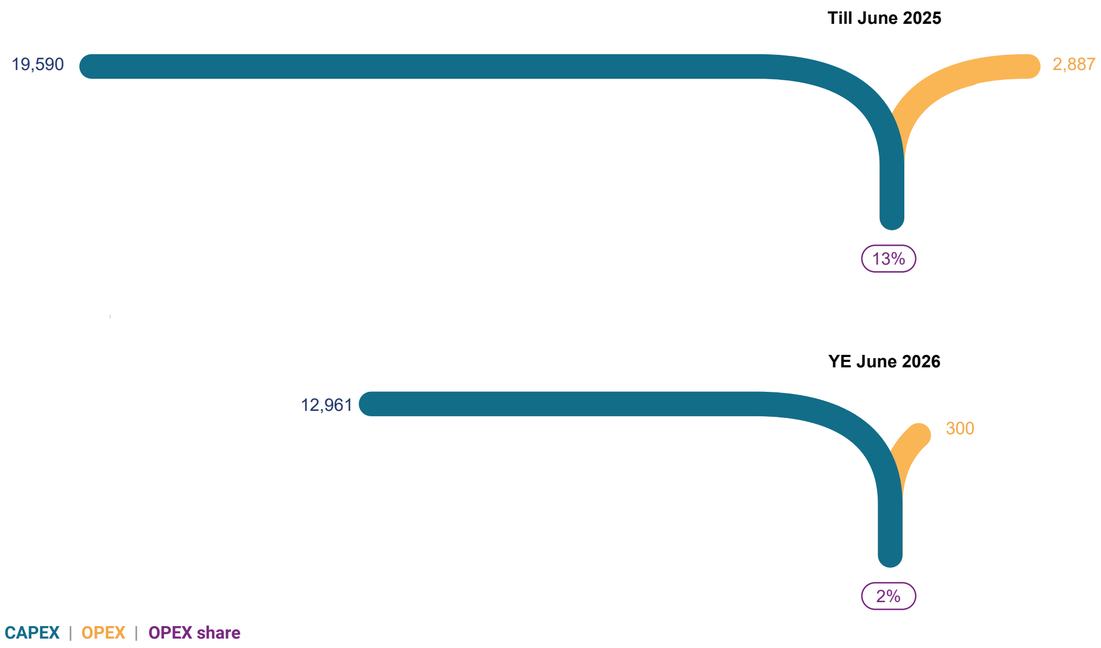
Top 10 project developers

Rankings by capacity installed in the 12-month period ended June 2026



Capacity addition by business model, MW[3]

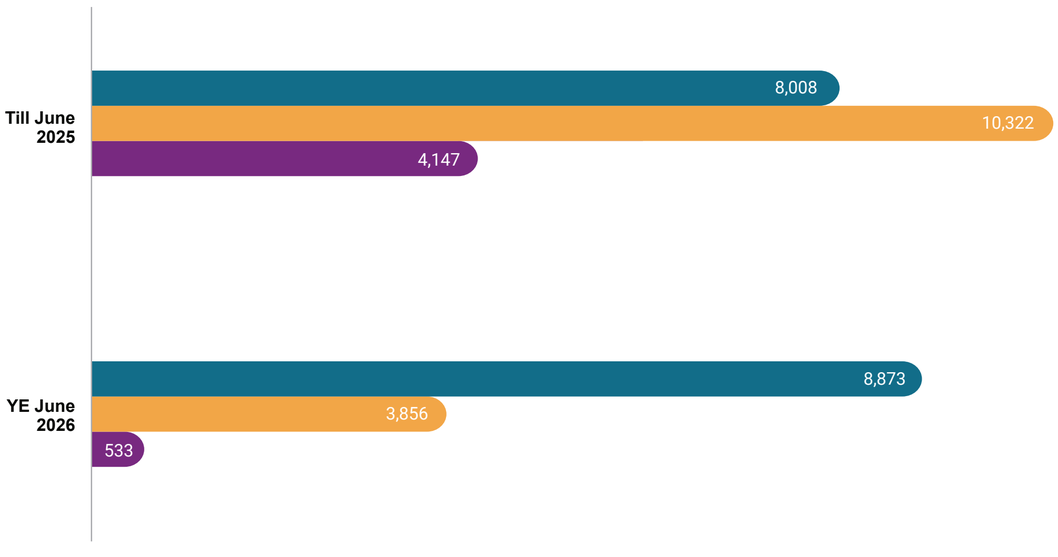
Market continues to be led by CAPEX deployments



CAPEX | OPEX | OPEX share

Share of different consumer segments

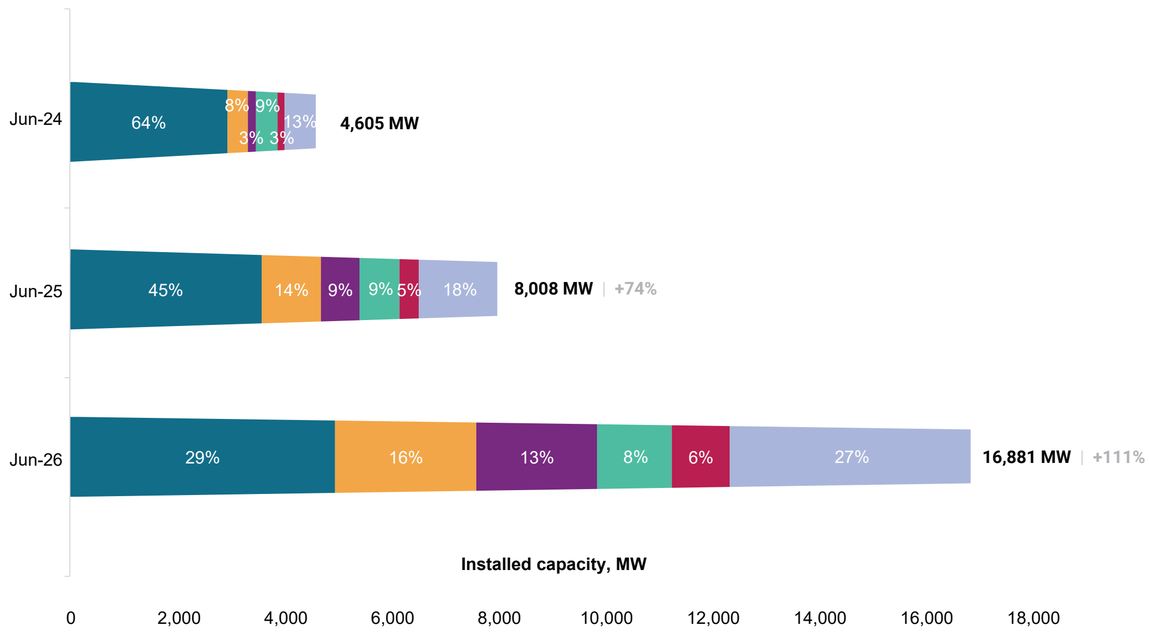
Residential rooftop additions in YE Jun-26 exceeded the segment's cumulative installed base



Residential | Industrial | Commercial

From Concentration to Dispersion: Top 5 states' share trend[6]

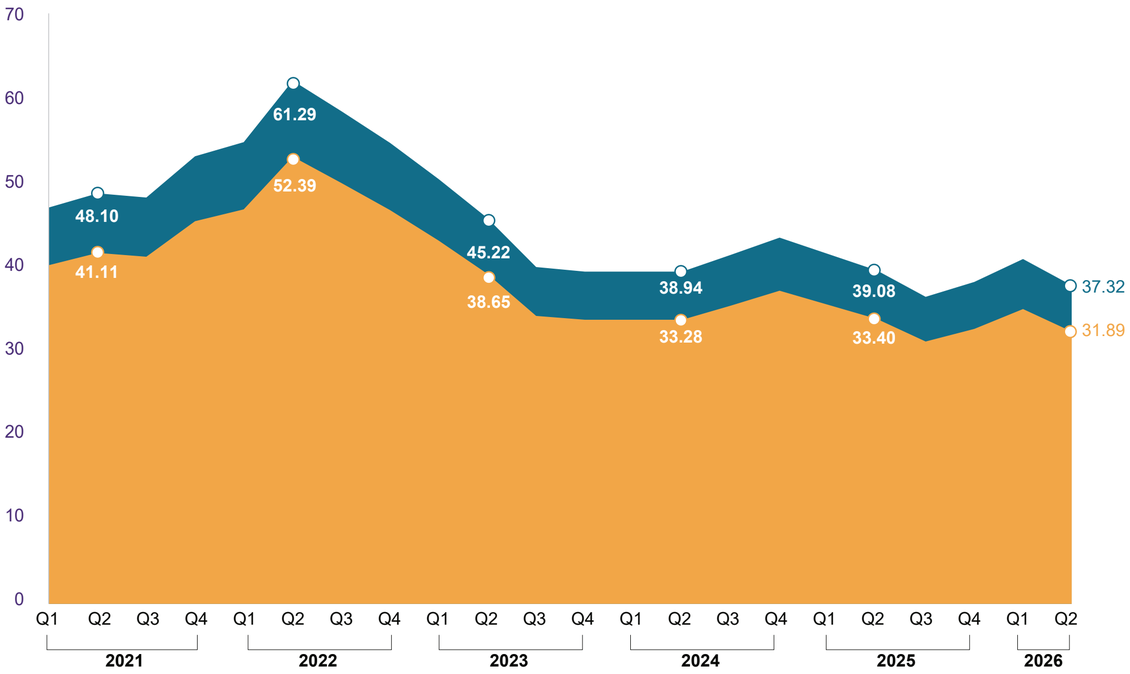
As new states scale up, legacy states' dominance on rooftop solar is diluted



Gujarat | Maharashtra | Uttar Pradesh | Kerala | Rajasthan | Others | YoY growth

EPC cost trend, INR/ Wp[7]

Softening module prices and market competition supported EPC cost moderation



Residential | Corporate





Crisil Bridge to India

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Notes:

1. Crisil-Bridge To India has conducted an extensive data collection exercise and relied on multiple market sources including project developers, equipment suppliers and state nodal agencies to provide accurate, factual information as far as possible. Some suppliers were either unreachable or did not validate the data available with us. All data has been cross-referenced with data provided by government departments and other market players, where possible. However, we do not guarantee completeness or accuracy of any information. We have classified all onsite solar systems (including any ground-based systems) as rooftop solar systems. All capacity numbers are specified in AC MW.
2. Because of changes in methodology, the state installation numbers in this report may not be directly comparable to previous reports. However, taking into account the revised methodology and market information, the estimated base installed capacity at the national level as of December 2023 is approximately 12 GW. The sector-wise breakdown of this capacity is as follows: commercial (21%), industrial (56%), and residential (23%).
3. OPEX (operating expenditure)-based systems are owned and installed by third-party investors at consumer premises. CAPEX (capital expenditure)-based systems are financed and owned by the consumers.
4. Data excludes OEM supplies to other companies.
5. For EPC contractors with installations under PMSGY, those accounting for less than 0.2% individual market share have been consolidated under the 'Others' category.
6. State-wise shares and cumulative installed capacity reflect only the residential rooftop solar market.
7. EPC cost for corporate and residential systems is estimated for a typical 500 kW and 5 kW installation respectively. Cost includes GST and import duties, as applicable.

Disclaimer

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INDIA SOLAR ROOFTOP MAP JUN 2026



35,739
total rooftop solar capacity

13,261
capacity addition in YE June 2026

Bridge To India Energy Private Ltd has been acquired by Crisil Ltd

by S&P Global