



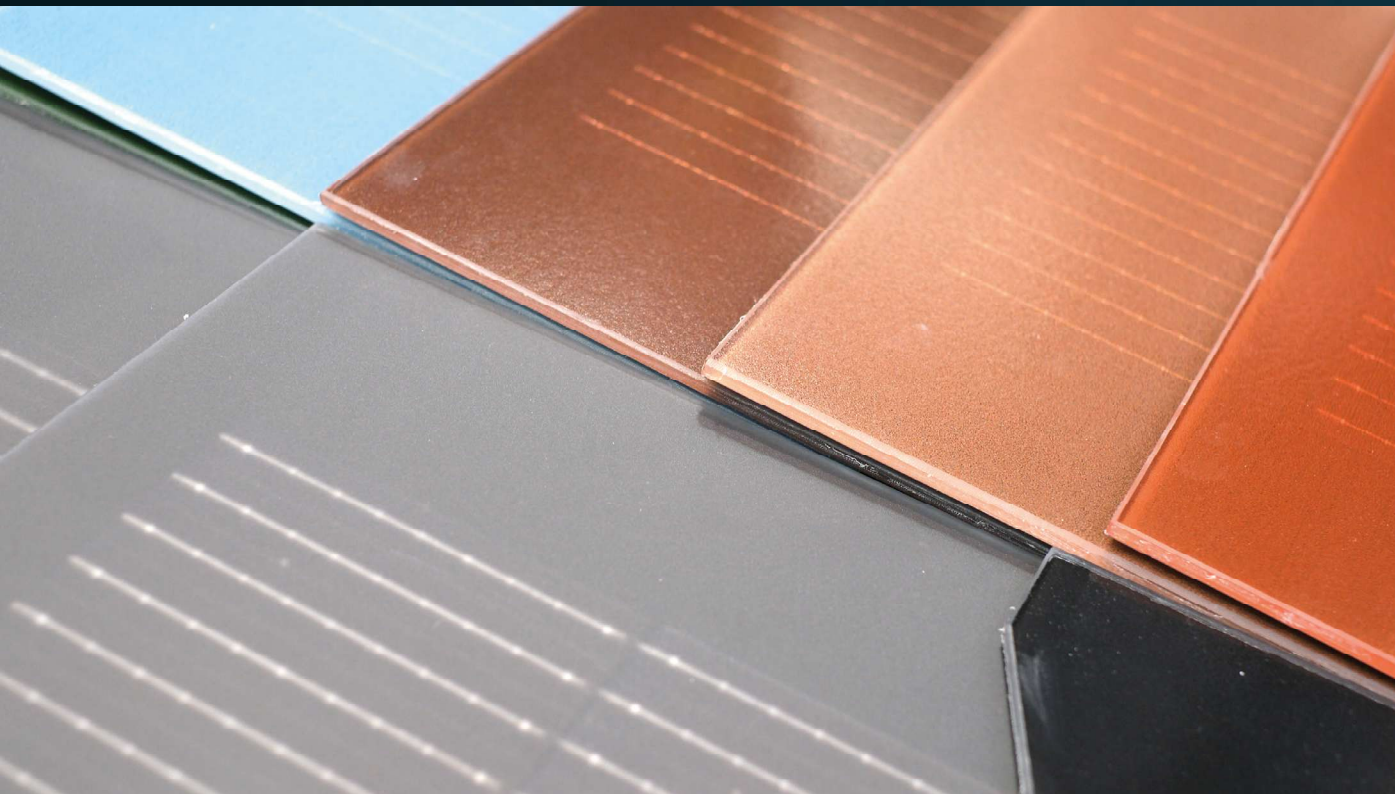
WHITEPAPER

FROM MODULE TO INTEGRATED SYSTEM: THESE
TRENDS ARE SHAPING THE SOLAR INDUSTRY IN 2026

THE EUROPEAN SOLAR MARKET: SOLAR ENERGY AS THE DOMINANT SOURCE OF POWER GENERATION

Solar energy remains on a strong growth trajectory and continues to expand its system-critical role. According to SolarPower Europe's Global Market Outlook for Solar Power 2026–2030, a record-breaking 664 gigawatts (GW) of new photovoltaic (PV) capacity were installed globally in 2025, pushing the global solar fleet past the three-terawatt (TW) mark for the first time. A milestone of symbolic weight: In 2025, solar energy generated more electricity worldwide than wind power for the first time, while serving as by far the single largest driver of global power generation growth – its expansion exceeded that of any other source by more than three times and covered three-quarters of global demand growth, while fossil fuel generation ceased to grow for the first time in years. [1]

In Europe, according to Ember, wind and PV combined surpassed fossil-fueled power generation in 2025, delivering a record share of 30 percent compared to 29 percent for fossil fuels. [2] This surge was primarily driven by solar PV, which, with a 13 percent share, generated more electricity than any other single source in the EU energy mix. According to SolarPower Europe, the EU-27 installed around 67 GW of new solar capacity in 2025, once again exceeding the previous year's total. In Europe, solar PV periodically covers one-fifth of total electricity consumption – now consistently sustained across several consecutive months. According to Fraunhofer ISE Energy-Charts, the share of solar energy in meeting German power load exceeded 20 percent for three consecutive months for the first time in 2026: 20.3 percent in May, 21.1 percent in June, and 21.5 percent in July. [3]



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THE POST-PV BOOM PHASE: PV IN CONCERT WITH COMPLEMENTARY TECHNOLOGIES

According to SolarPower Europe, the European solar market will undergo a brief consolidation phase in 2026 and 2027 before resuming its growth trajectory from 2028 onward, stabilizing at nearly 67 gigawatts of annual new installations by 2030.

The reason: While the technology is ready, the broader system is not – the massive surge in solar additions accompanying the energy crisis is putting traditional business models under pressure across many mature European solar markets. The market value of solar electricity is declining, and generation and consumption are not yet in sync. At the same time, grid capacity bottlenecks and a lack of digitalization are slowing down expansion.

Flexibility, sector coupling, and electrification represent both a way forward and a major challenge for the industry. While technological solutions exist, what is missing is cross-industry collaboration among key stakeholders, dynamic adaptation of existing structures, and enabling regulatory frameworks.

Addressing this exact challenge, Intersolar Europe – held as part of The smarter E Europe – has evolved from a B2B solar exhibition into a platform for networked energy solutions. The trends at this year's event demonstrate that the industry has moved far beyond modules and efficiency rates: PV is evolving in tandem with complementary technologies such as battery energy storage systems, e-mobility, heat pumps, and energy management systems. Furthermore, its applications are expanding well beyond traditional rooftop and greenfield installations.

In this whitepaper, we outline the key trends driving the transition from a focus on pure generation to a systems-oriented approach – trends that will prove decisive for the continued success of solar energy.



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INSIGHTS FROM HORST DUFNER



THE PROJECT MANAGER OF INTERSOLAR EUROPE AND THE SMARTER E EUROPE DISCUSSES THE TRENDS AT THIS YEAR'S INTERSOLAR EUROPE.

Horst Dufner has accompanied the industry for 25 years at exhibition organizer Solar Promotion GmbH, most recently in his role as Project Lead of Intersolar Europe and Head of The smarter E Europe. In this capacity, he provides an overview of the key trends and developments shaping the industry and the 2026 event.

What overarching theme defined the 2026 edition – and where lies the greatest potential for innovation and new business models?

"Without a doubt, it was the role of solar energy embedded within the broader theme of a 24/7 renewable energy supply – its technical feasibility, societal benefits, and economic advantages. That is precisely what we brought to life at our special exhibit, Renewables 24/7."

The greatest potential for innovation and new business models is directly linked to this: Solutions are emerging that no longer revolve solely around generating kilowatt-hours, but around unlocking the value of solar power beyond the moment of generation. Through intelligent energy management, AI-assisted forecasting, and grid-supportive control, PV becomes flexibly dispatchable. Storage – whether in battery storage systems, as green hydrogen, or by integrating vehicle batteries via bidirectional charging – makes solar power available whenever it is needed."

What changes have occurred in specific applications and products compared to the previous exhibition?

"Components like PV, energy storage, EV charging infrastructure, and heat pumps are now designed together and demanded as an integrated system. This combination is booming, particularly in the commercial sector. All-in-one energy systems are establishing themselves most clearly: All components come from a single source and are fully coordinated, with the solar installation forming the core surrounded by storage and energy management."

When it comes to modules, design plays a much larger role than before – full-black and building-integrated photovoltaics (BIPV). It's no longer just about performance, but also about aesthetics and seamless architectural integration. This is precisely what is driving spatial diversification: Building integration and decentralized supply are growing noticeably – from balcony solar systems to facade-integrated PV. Photovoltaics is continually unlocking new surfaces, ranging from agrivoltaics to the building envelope."

What developments are taking place in the large-scale PV segment?

"Here, progress is less about the module itself and more about system technology – inverters are taking center stage. The trend is moving toward larger, higher-capacity devices that significantly reduce balance-of-system (BOS) costs and enhance the economic viability of utility-scale projects."

Particularly critical is a new generation of grid-forming inverters: In combination with storage systems co-located behind the solar array, they provide essential system services and turn solar farms into grid-stabilizing assets – capabilities that are increasingly in demand across numerous major solar markets."

For ground-mounted systems, module costs are no longer the sole decisive factor; the speed and cost-effectiveness of plant construction are equally crucial. That is where significant scaling potential currently lies – ranging from construction automation to solutions that ensure reliable and high-yield operation even in challenging locations."

EXHIBITION TREND: ALL-IN-ONE SYSTEMS

The fact that PV is no longer viewed as a standalone technology was particularly evident at Intersolar Europe 2026. Numerous major inverter and module manufacturers showcased complete systems rather than individual products, connecting the PV array as a central generation technology with storage, energy management, EV charging infrastructure, and other applications into a comprehensive, unified system.

What is remarkable here is not the combination of technologies per se – which has been established on the market for several years – but rather the strategic realignment of manufacturers. While exhibition displays previously focused on standalone components, numerous companies made the complete energy ecosystem the focal point in 2026.

Typical components of the presented systems included:

- PV system
- Battery storage system
- Hybrid inverter
- Energy management system for residential or commercial applications (HEMS/EMS)
- Wallboxes and smart charge management
- Heat pump integration
- Emergency power and backup functionality
- Cloud-based monitoring and service platforms
- AI-driven energy optimization and integration of dynamic electricity tariffs

The actual shift, however, lies not in hardware, but in software. Functions such as intelligent load management, forecasting based on weather and consumption data, AI-driven optimization, and the automated utilization of dynamic electricity tariffs are coming to the forefront where hardware used to dominate. Software is thus becoming the primary differentiator: Numerous manufacturers are positioning themselves no longer as equipment vendors, but as digital energy platform providers. While the solar installation remains the physical core of every system, value creation is increasingly shifting to the layer that intelligently orchestrates generation, storage, and consumption.



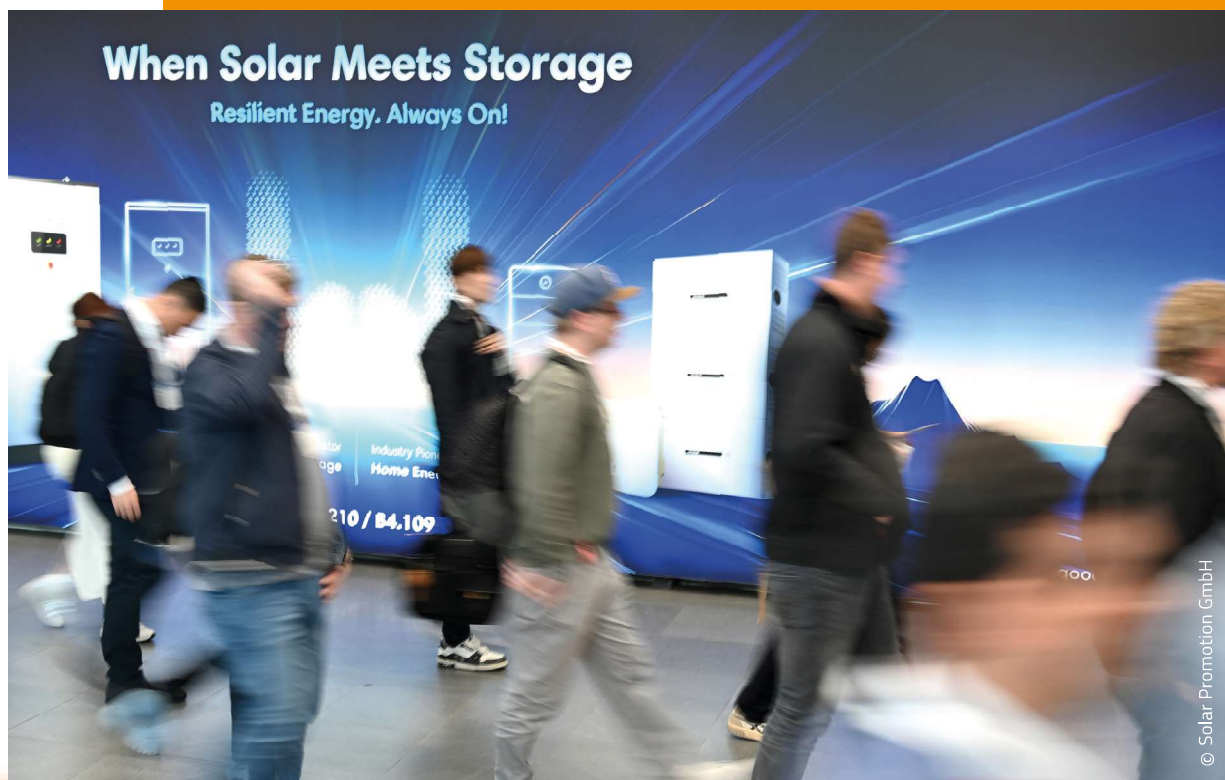
This positioning was also reflected in the exhibition's terminology. Terms such as Energy Ecosystem, All-in-One Solution, Home Energy Platform, and Energy Operating System were present across numerous booths and product launches. Underlying this is a shared objective: Diverse energy applications should no longer exist in isolation, but be operated as an integrated, software-managed system. At companies like Huawei FusionSolar, Sungrow, and GoodWe, solutions differed technically but pursued the same strategy: Enabling customers to source all components from a single provider. This simplifies planning, installation, and service while enabling tighter coordination between generation, storage, and consumption.

It was also notable that this integration concept is no longer confined to the residential sector, but is encompassing all market segments – from residential and Commercial & Industrial (C&I) to utility-scale projects. The form varies by scale: Where a compact all-in-one system fits a residential home, manufacturers offer pre-integrated, turnkey complete systems for larger facilities.

Intersolar Europe 2026 thus marks another step in the evolution of the PV industry: The focus is shifting away from individual components toward integrated systems that intelligently generate, store, distribute, and consume solar power – with competition increasingly decided not by single devices, but by the seamless interaction of the entire energy ecosystem.

FROM MODULE MANUFACTURER TO SYSTEM PROVIDER

The transformation into a system provider is sweeping across the entire value chain – affecting not only inverter manufacturers but module manufacturers as well. Companies like Trina Solar and Jinko are expanding their portfolios to include storage, trackers, and energy management, offering integrated energy solutions. Consequently, competition is increasingly shifting from optimizing individual components to maximizing the performance of complete energy systems.



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EXHIBITION TREND: SOLUTIONS FOR C&I

The Commercial & Industrial (C&I) segment experienced a major boom at Intersolar Europe 2026. A key driver behind this is the strong economic business case for PV. German industrial customers pay approximately 14 to 16 cents per kilowatt-hour for grid power, whereas Fraunhofer ISE estimates the levelized cost of electricity (LCOE) for large commercial rooftop PV at 5.6 to 12 cents.[4] This gap makes self-consumption an obvious decision for a growing portion of the C&I sector – turning commercial and industrial players into one of the most dynamic drivers of European solar expansion. Rapidly falling battery storage prices and the increasing adoption of electric corporate fleets are driving strong corporate interest in combined PV solutions with these complementary technologies. Accordingly, the focus at Intersolar Europe 2026 shifted from pure installation to system integration.

Key C&I Trends in 2026 at a Glance:

- Smart sector coupling: PV, storage, charging infrastructure, and heating merge into a turnkey commercial package from a single source.
- New inverters: Both hybrid and string units enable seamless integration and boost yields.
- Application-specific modules: Specialized products replace standard modules on C&I rooftops.
- New deployment areas: Solar carports gain market share in the C&I sector, partly driven by regulatory mandates.

SOLAR EXPANSION DRIVEN BY C&I STORAGE GROWTH

According to EUPD Research, C&I battery storage additions in Europe are projected to grow by 78 percent in 2026 compared to the previous year.[5] This strong growth simultaneously acts as a catalyst for solar expansion in the segment, as companies leverage storage to optimize generation and consumption while increasing self-consumption rates. The tight pairing between PV and storage demand was clearly reflected in contract signings at the show: LONGi reported approximately 2.5 GW of PV module contracts and 1.6 GWh of battery storage in its Distributed Generation division, with a significant share attributed to C&I applications. [6]



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SMART SECTOR COUPLING: ALL-IN-ONE FOR COMMERCIAL APPLICATIONS

The all-in-one approach outlined in Section 3 was strongly represented at Intersolar Europe 2026 through C&I solutions, moving beyond its historical focus on the residential segment. Manufacturers presented comprehensive commercial energy solutions: Rooftop PV, storage for self-consumption optimization, corporate fleet charging infrastructure, and increasingly heat generation are planned as a fully synchronized system. In this context, AI-driven control and energy management become crucial elements, enabling the intelligent orchestration of generation, storage, consumption, and peak shaving – thereby opening up new business models for commercial and industrial enterprises.



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POWER ELECTRONICS FOR C&I

Significant progress was also visible in inverter technology – both in hybrid inverters that integrate PV and storage within C&I packages, and in dedicated PV string inverters focused on higher power density, enhanced module compatibility, and simplified installation. Companies such as SMA, Sungrow, and SolarEdge introduced new commercial-grade devices.

APPLICATION-SPECIFIC MODULES

In module design, the C&I focus is reflected less in sheer power ratings and more in tailoring products to specific deployment scenarios: Partial shading from rooftop HVAC equipment, fire safety compliance, and glare prevention along transit routes. Manufacturers responded with modules engineered specifically for these operating conditions. A related trend addresses structural load limits: Because many older commercial roofs cannot support the weight of conventional glass-glass modules, significantly lighter modules were introduced to unlock such rooftops without requiring costly structural reinforcement.

CARPORTS: C&I SECTOR UNLOCKS NEW SURFACES

Finally, new surfaces are being repurposed in the C&I sector. Beyond traditional rooftops, parking lots are increasingly coming into focus – solar carports combine land dual-use with shading and, when paired with connected EV charging infrastructure, direct sector coupling. Mounting frame manufacturers adapted accordingly: The trend favors modular, wide-span carport systems engineered for rapid installation. This trend is further supported by regulatory tailwinds across multiple regions.

WHEN PARKING LOTS BECOME POWER PLANTS

Solar carports are gaining traction in the C&I segment partly due to regulatory mandates. In France, the APER law has required operators of outdoor parking lots exceeding 1,500 square meters to cover at least half of the area with PV since 2023; a 2025 amendment permits equivalent renewable generation elsewhere. In Germany, several federal states now mandate solar carports for large new parking facilities, typically starting at 25 to 50 spaces.



EXHIBITION TREND: INVERTERS

Inverters are undergoing a transformation that goes beyond mere efficiency gains or faster switching speeds: The device is evolving from a passive power converter into an active system building block that serves both the user and the grid. [7]

Key Trends in 2026 at a Glance:

- Grid-forming inverters are taking over system services previously provided by conventional power plants.
- Silicon Carbide (SiC) is driving power density, efficiency, and higher voltage levels.
- Hybrid inverters are becoming the default standard – from residential homes to solar parks.
- Software, AI, and cybersecurity are emerging as distinct competitive dimensions.

FROM POWER CONVERTER TO ACTIVE GRID COMPONENT

The leading trend: Inverters are increasingly assuming responsibilities previously handled by conventional thermal power plants. Fault-ride-through capability – ensuring devices ride through brief grid disturbances rather than immediately disconnecting – has long been standard. Added to this is their growing importance for grid stability: An increasing number of inverters feature grid-forming capabilities. They actively compensate for voltage and frequency fluctuations and, in some cases, feature black-start capability. This trend is also driven by regulation: In Germany, for example, black-start capability at the extra-high voltage level is already required under grid connection code VDE-AR-N 4130, with plans to extend this mandate to networks operating at 10 kV and above starting in 2028.



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SILICON CARBIDE AND POWER DENSITY

The most prominent purely technical trend: Silicon Carbide (SiC) is replacing traditional silicon IGBTs, particularly in large string and central inverters. This enables higher conversion efficiencies, more compact designs, and superior thermal tolerance – while simplifying cooling requirements. Power density is rising rapidly as a result: The Huawei string inverter awarded The smarter E Award achieves 506 kW at approximately 1.5 MW per cubic meter – whereas 17 years ago a single megawatt weighed 35 metric tons, five megawatts now fit into a standard 20-foot container. Concurrently, operating voltages are climbing, with 3,000 V DC under discussion for utility-scale inverters. Looking beyond Silicon Carbide, Gallium Oxide promises even higher operating voltages at significantly lower production costs.

HYBRID INVERTERS BECOME THE STANDARD

Energy storage is increasingly integrated into system designs from the outset: In the residential market, pairing PV with batteries has long been the norm, and its market share is growing rapidly in commercial and utility-scale projects. Consequently, hybrid inverters – combining PV and storage management in a single unit – have become the preferred choice across all power classes. Equally evident is the trend toward DC coupling, which reduces component counts and minimizes conversion losses. C&I-specific hybrid and string devices were highlighted in Section 4; they form part of the same broader transition from standalone equipment to integrated systems.



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SOFTWARE, AI, AND CYBERSECURITY

As its system role expands, the inverter is transforming into the digital control hub of the PV plant – with software becoming the true competitive differentiator. No longer merely controlling grid feed-in, the inverter increasingly handles AI-driven tasks: Yield forecasting, predictive maintenance, and real-time optimization of generation, storage, and consumption. Consequently, the cyber-attack surface expands. Because the inverter is permanently connected to the network and interacts deeply with plant controls, security is taking center stage. High demand exists for encrypted remote access, clear network segmentation, and certified security architectures designed to prevent unauthorized access.

EUROPEAN INVERTER MANUFACTURERS ON THE RISE

A distinct sense of momentum was palpable among European suppliers. Several developments are playing to their strengths: A recent EU resolution effective November 2026 excludes inverters from high-risk countries – most notably China – from subsidized energy projects; the blackout on the Iberian Peninsula highlighted the critical need for trustworthy, intelligent control systems; and the phase-out of Chinese export incentives is driving up prices. European manufacturers stand ready to meet demand: According to S&P Global, production can be scaled up within months, and a European-made inverter adds only about two percent to total project costs.[8] Accordingly, manufacturers such as SMA, Fronius, Kaco, and Kostal delivered confident presentations in Munich.

EXHIBITION TREND: INTEGRATED APPLICATIONS

The trend toward applications beyond traditional rooftop and ground-mounted systems was once again strongly emphasized at Intersolar Europe 2026.

AGRIVOLTAICS (AGRI-PV)

Agrivoltaics emerged at Intersolar Europe 2026 as a standalone system solution specifically tailored to agricultural requirements. The focus was no longer restricted to PV yield, but expanded to vertical clearances, farm machinery access, harvesting workflows, and integration into existing farming practices.

Key Agrivoltaic Trends in 2026:

- Specialized trackers optimized for farm machinery and crop types
- Dedicated operating modes for planting, harvesting, and field operations
- Standardization and permit readiness as primary product features
- Deeper integration into agricultural operational workflows

The most pronounced specialization occurred in mounting technology. IDEEMATEC, Antaisolar, PV Hardware, and Schletter showcased agrivoltaic systems featuring wide spans and variable clearance heights – ranging from approximately 1.3 to 5 meters depending on system configuration. This provides sufficient clearance for agricultural machinery while accommodating diverse crop types and farming techniques. A recurring detail was „Harvest Mode”: Trackers tilt the modules into a steep vertical position during harvest to facilitate the passage of large machinery for planting, harvesting, or fertilizing.

Simultaneously, control systems are becoming tightly linked to agricultural operations. Systems increasingly process weather, site, and positional data while offering dedicated operating modes for harvesting, mowing, or soil treatment. The solar tracker is thus evolving from a pure PV yield optimizer into an integral part of farming infrastructure.

Regulatory compliance is likewise turning into a key product feature. Manufacturers are intentionally engineering systems to comply with standards such as DIN SPEC 91434 and European subsidies and permitting frameworks. This highlights the ongoing professionalization and standardization of the market. This momentum was further underscored at Intersolar Europe 2026 by the establishment of an Agrivoltaics Task Force by the Global Solar Council, aimed at strengthening collaboration between the solar and agricultural sectors, policymakers, and research institutions.



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BIPV AND COLORED SOLAR CELLS

Building-Integrated Photovoltaics (BIPV) demonstrated clear market maturity at Intersolar Europe 2026. Primary growth drivers include rising acceptance of architecturally designed solar facades and the utilization of building facades as supplementary PV surfaces beyond rooftops. PV is increasingly becoming an architectural building element in its own right: Color, surface texture, format, and geometry can be tailored to match overall building design.

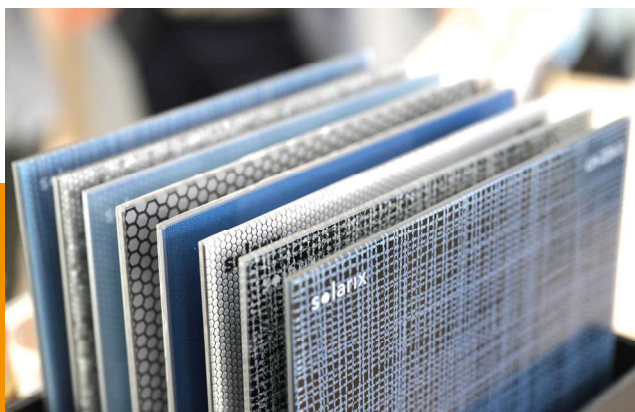
Key BIPV Trends in 2026:

- Aesthetics and color options as primary selling points
- Customization and tailor-made module manufacturing
- PV as a replacement for or constituent element of conventional building materials
- Heightened functional requirements, such as anti-glare and anti-reflective properties

The most visible trend was color. Color options now range from terracotta and red to green and gray, while efficiency losses relative to standard modules continue to decrease. Utilizing MorphoColor / ShadeCut technology, Fraunhofer ISE achieves approximately 95 percent of the output of a comparable uncoated module, enabling realistic patterns such as roof tiles or brickwork alongside solid colors. Suppliers like FuturaSun, BISOL, and Huasun expanded their colored module lineups. Microquanta took the technological lead by introducing colored perovskite-silicon tandem modules: Achieving 26 percent efficiency with its BIPV module, the company aims to resolve the trade-off between visual aesthetics and energy yield.

The second key development is customization: Modules are increasingly fabricated to architect specifications regarding color, finish, dimensions, and geometry. For instance, 3S showcased custom rooftop and facade solutions. Simultaneously, PV roof tiles and facade modules for rainscreen/ventilated facades – such as those from ML System – are engineered as complete building components. The goal is no longer mounting a module onto a building, but incorporating PV as an integral part of the building envelope – opening up new opportunities, particularly for heritage-protected buildings.

Functional requirements are also coming into focus. Anti-glare surfaces are engineered to minimize reflections and glare, enabling deployment in sensitive urban environments. BIPV is thus evolving from an aesthetic niche into a customizable building surface where aesthetics, structural function, and energy generation are designed as one.



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EXHIBITION TREND: THE ROLE OF PV IN 24/7 RENEWABLE ENERGY SUPPLY

The market speaks for itself: Solar energy has become a cornerstone of global power generation. Consequently, the central question facing the photovoltaics industry is shifting: The primary focus is no longer solely on adding capacity, but on how to transform low-cost, weather-dependent solar power into a reliably available energy source 24 hours a day. This was the flagship topic at Intersolar Europe 2026 and represents the benchmark against which the future role of PV will be evaluated.

The imperative for solar generation stems primarily from its compelling economic advantage. Utility-scale PV ranks among the lowest-cost new generation sources worldwide. According to the International Renewable Energy Agency (IRENA), the average cost of solar power stood at approximately 4 U.S. cents per kilowatt-hour in 2024 – roughly 41 percent below the cheapest fossil alternative. [9] As a result, PV serves as an economic anchor for a 24/7 renewable energy supply, making the new energy system affordable. When paired with battery storage and strategic overbuilding, volatile solar generation can be converted into an increasingly continuous and dispatchable power supply. According to IRENA, a 93 percent decline in BESS costs between 2010 and 2024 means that at favorable locations, the cost of delivering round-the-clock power from PV combined with BESS is already lower today than building a new coal- or gas-fired power plant.

When combined with other forms of energy storage – such as green hydrogen – and, crucially, the unlocking of flexibility, a 24/7 energy supply powered primarily by solar energy is technically viable, economically sound, and socially desirable. Demonstrating this synergy in practice, the „Renewables 24/7“ special showcase at Intersolar Europe 2026 spanned four thematic areas: Industry, Commercial, Residential, and Mobility. These exhibits illustrated how intelligent generation, storage, flexible energy infrastructure, and digital management combine to create a reliable, cost-effective energy system – and how solar power and complementary technologies drive economic growth, prosperity, resilience, and climate neutrality. This vision is detailed in the accompanying study prepared by Fraunhofer ISE for the showcase, titled „Cost-Optimal Transformation of the German Energy System by 2045.“



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CONCLUSION – PV: FROM MODULE TO SYSTEM BUILDING BLOCK

The future of the PV industry is increasingly decided not by peak wattage or cell efficiency, but by integration into an interconnected system where applications, complementary technologies, and digitalization work in unison. Intersolar Europe is transforming from a traditional solar exhibition into a comprehensive system exhibition and platform for cross-industry solutions. While technological advancements in solar hardware and accompanying cost reductions provide the foundation, the expansion of former niche sectors like C&I and BIPV continues to propel European and global solar growth. System integration is becoming the baseline standard for new solar projects, with the combination of battery storage, EV charging infrastructure, heat pumps, and energy management systems becoming default requirements. While this increases overall complexity, it significantly enhances the performance and capability of PV installations in delivering holistic energy supply.

Resilience and affordable energy supply: Intersolar Europe 2026 demonstrated that solar energy, working in concert with other cleantech solutions, can deliver both – further solidifying its foundational role in the global energy system.

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“Accelerating Integrated Energy Solutions” – that is the goal of The smarter E Europe, Europe’s largest alliance of exhibitions for the energy industry. The aim is to create a future-oriented energy world by shining a spotlight on renewable energies, decentralization and digitalization as well as cross-industry solutions from the electricity, heat and transport sectors for a sustainable 24/7 energy supply.

The smarter E Europe brings together the four exhibitions Intersolar Europe, ees Europe, Power2Drive Europe and EM-Power Europe. The exhibitions take place annually at Messe München.

ORGANIZERS



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