Key findings

Global Off-Grid Solar Market Report

July-December 2021
Agenda

• Key insights from the ‘Global Off-Grid Solar Market Report: July–December 2021’¹ – Report Authors

• Q&A

¹ Half-yearly primary sales & impact data collection conducted and led by GOGLA, in partnership with Lighting Global and the Efficiency for Access coalition, with the support of UKAID
How to Take Part

• Submit your questions via the “Q & A” section, shown on the bottom of your screen

• Feel free to target your question to a particular panelist

• You can also upvote other participants’ questions

• Please note that the session will be recorded and shared afterwards

• Experiencing problems? Please notify us via the chat function, shown on the bottom of your screen
Poll – Please select the description which best fits your organization.

- Company with off-grid solar generation as primary focus (e.g. SHS, solar lanterns)
- Company with off-grid solar appliances as primary focus (e.g. TVs, fans, solar water pumps)
- Investor or Development Finance Institution
- Development Partner or Government Agency
- Consultant
- Researcher
- Industry Association
- Other
Panel

Patricia Njeri  
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EST

Riley Macdonald  
CLASP
Global sales volume for the second half of 2021 reached 3.97 million units, a 15% increase on the first half of 2021. However, positive headline figures hide a fragile and uneven recovery.

PAYGo sales grew by 27% and have reached their highest level yet.
Key Insight #2

Increasing sales volumes of PAYGO solar lanterns with phone charging (1.5-3Wp) has been a key trend over the last two years and a major contribution to PAYGo volumes overall.

PAYGo solar lantern sales grew 232% between the first half of 2019 and second half of 2021.
Key Insight #3

Overall, appliance sales have shrunk compared to last round – 338,000 key appliance units were sold globally, which is a decrease of 20% compared to the first half of the year

- 196,000 TVs were sold in the second half of 2021, a 1% increase compared to the first half of 2021
- 134,000 fans were sold in the same period, a 38% decrease compared to the first half of 2021
- 2,200 refrigeration units were sold globally, a 45% decrease compared to the first half of 2021
- SWPs sales reach 6,600 units, a 3% increase in sales compared to the first half of 2021

![chart showing sales of TVs, Fans, Refrigeration Units, and Solar Water Pumps from Jul-Dec 2019 to Jul-Dec 2021]
Key Insight #4

When looking at appliance sales by country, all appliances had the same country as their top selling market in H2 2021 as they did in H1 2021.

Top 5 countries per appliance type:

1. Kenya
2. India
3. Togo
4. Ethiopia
5. Mali
Countries in East Africa follow very different trends

East Africa has seen a 4% increase in sales overall, but this hides a strong disparity between mature markets like Kenya and Ethiopia which are yet to return to growth, while more emerging or nascent market further south are seeing strong growth through untapped opportunities and programmatic support.
Nigeria is driving growth in volumes sold in West Africa through-out the pandemic

Both cash and PAYGO sales have seen strong growth compared to the first half of 2021 leading to an overall 62% increase in volumes of lighting products sold. Sales are now 133% higher than in H2 2019.
TV sales slightly decreased in East Africa; however, if Kenya is excluded then TV sales in the region are growing and are the highest they have been since the beginning of the COVID-19 pandemic.
Key Insight #8

Fan sales in the second half of 2021 decreased 38% compared to sales reported during the first half of 2021 due to three key factors:

- Fewer companies reporting fan sales
- Seasonality
- Increased prices for fans in South Asia
Q&A time!

• Write your questions in the Q&A box
• Mention if it is for one of our panelists in particular
Poll – Was this webinar insightful for you?

- Yes! Very insightful
- Yes, but could’ve contained more information
- Neutral, it was ok
- No, I was expecting something else

Email o.reynolds@gogla.org with further feedback
Thank you for attending! Want to learn more?


Visit our impact hub: https://www.gogla.org/welcome-to-the-gogla-impact-hub

Contact Oliver Reynolds (o.reynolds@gogla.org) if interested in more data insights or in reporting your sales!