



# THE WEBINAR WILL START SHORTLY





# Key findings

## Global Off-Grid Solar Market Report

January – June 2021



# Agenda



- **Key insights from the 'Global Off-Grid Solar Market Report: Jan – June 2021'<sup>1</sup> – Report Authors**
- **Q&A**

<sup>1</sup> 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



**Sjef Ketelaars**  
GOGLA  
(Moderator)

**Oliver Reynolds**  
GOGLA

**Johanna Galan**  
ESMAP

**Elisa Lai**  
CLASP

**Sheree Conibear**  
EST

# Key Insight #1



Portable  
Lanterns



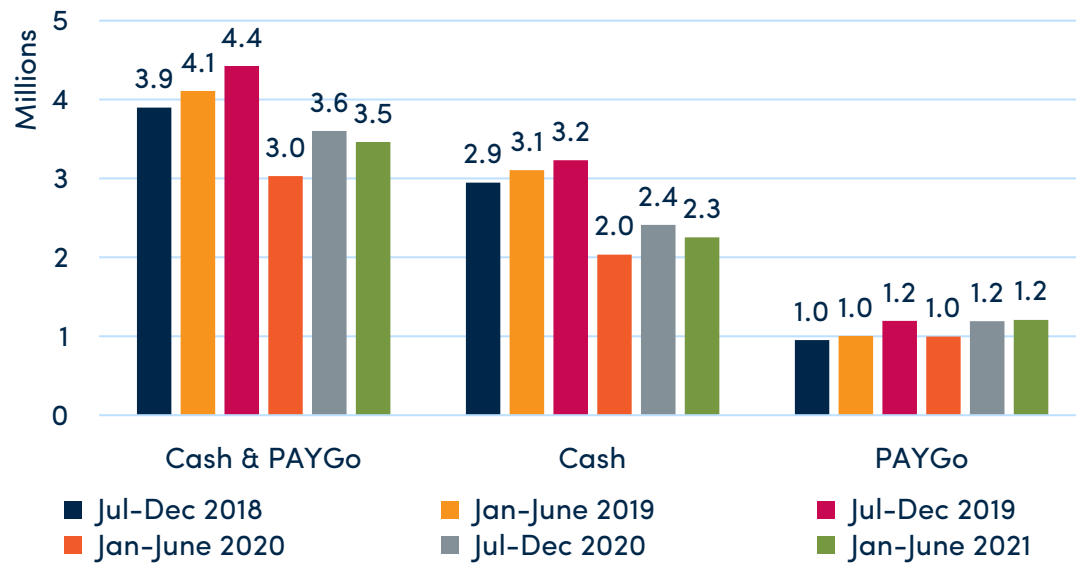
Multi-light  
systems



Solar Home  
System



Global sales volume for the first half of 2021 reach 3.46 million units, a 4% decrease on the second half of 2020. The sector is not yet back on a growth trajectory overall, but global headline figures mask contrasting underlying trends. **PAYGo sales are growing and have reached their highest level yet**



- PAYGo sales grew 1% compared to the previous reporting round and are now at their highest level-ever.
- Cash sales decreased 7% compared to the second half of 2020 and are now 30% lower than in the second half of 2019.
- Companies also fared differently during the last 18 months. While 57% of reporting companies reported lower sales than in the second half of 2019, 41% reported stable or higher sales.

# Key Insight #2



Portable  
Lanterns



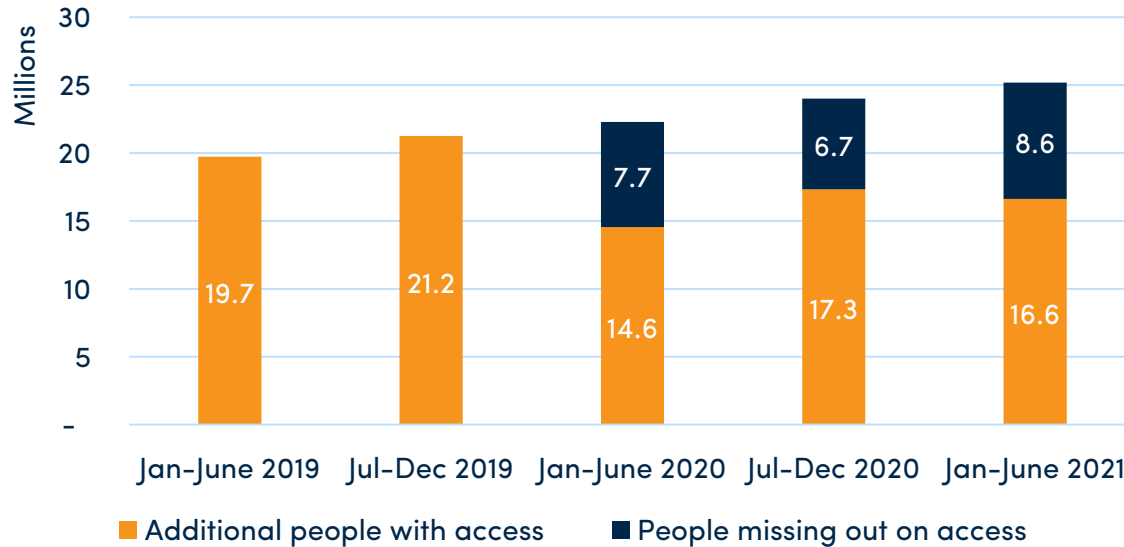
Multi-light  
systems



Solar Home  
System



Since 2010, over 360 million people have gained access to modern energy through off-grid solar products. Yet, had the sector remained on the pre-COVID growth trajectory, an additional 23 million people could also have benefited



- Pre-COVID, the off-grid solar sector was already not on a sufficiently strong growth trajectory to deliver its contribution to SDG7
- Continued and strong support will be required for the sector to recover and expand to meet its target



# Key Insight #3



SWP



Fans



Tv

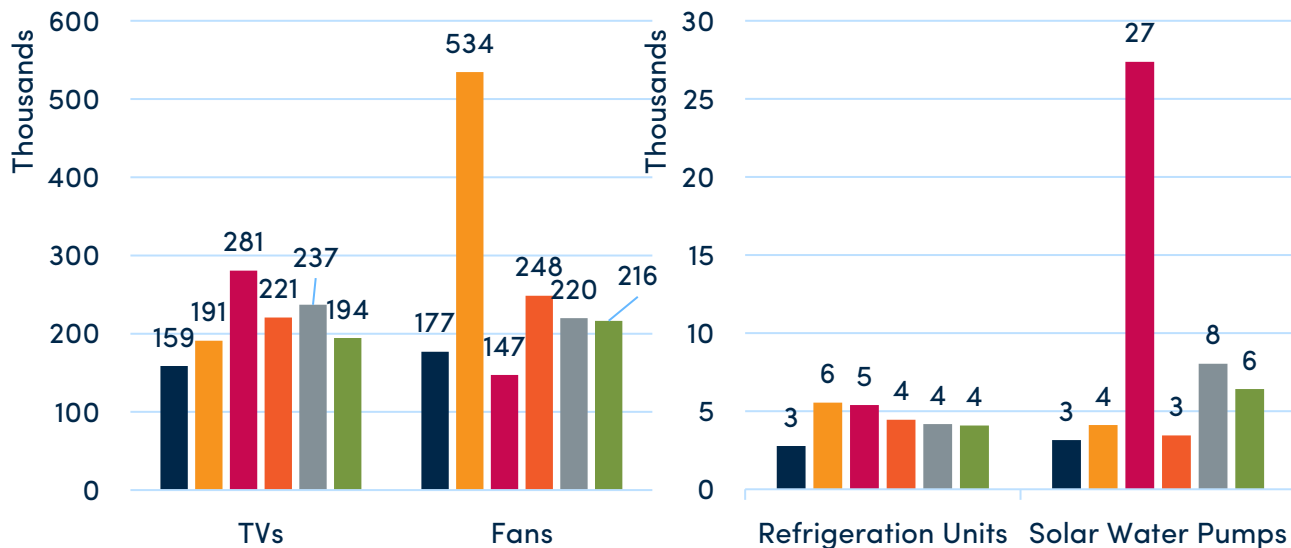


Refrigeration



Overall, there has been a decrease in sales compared to H2 2020 for all appliances, and overall figures remain significantly lower than pre-COVID levels

- TVs have experienced the largest absolute decrease, likely in line with decreased sales of 21 to 100 Wp SHS
- Fans represent 51% of the key appliance sales
- Refrigeration unit sales have remained relatively stable compared to the second half of 2020 with only a 2% fall in sales



# Key Insight #4

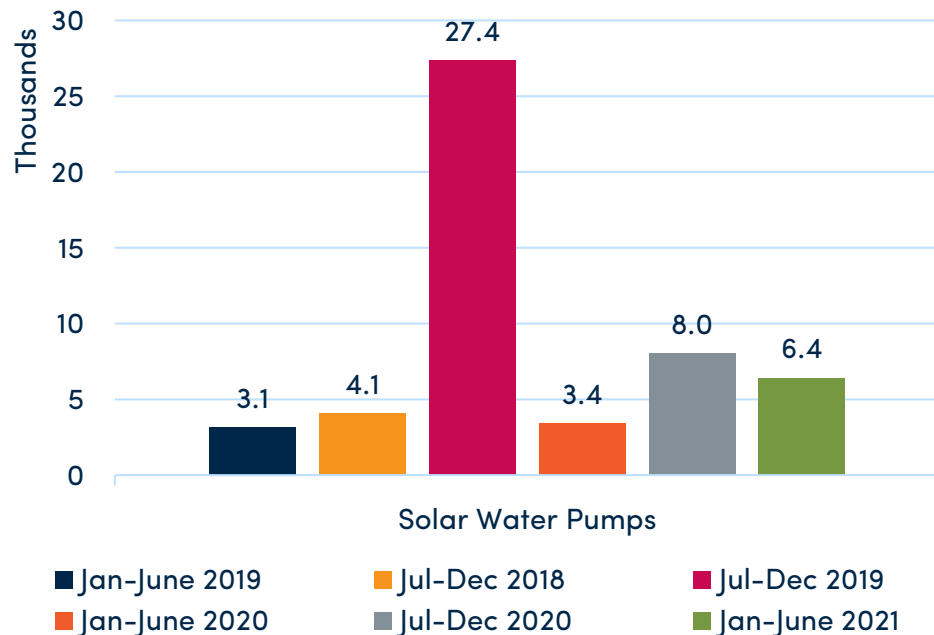


SWP



Solar water pump sales have decreased 20% compared to the second half of 2020, but are still **more than double what they were in the first half of 2019**

- PAYG is driving 85% of the SWP sales, signifying the high-upfront barrier to mass adoption and the importance of consumer financing.
- Strong SWP sales in East Africa, presenting 74% of the global sales.
- In contrast, sales in India, which has been a strong SWP market, now only account for 14% of the global SWP sales.



# Key Insight #5



Portable  
Lanterns



Multi-light  
systems

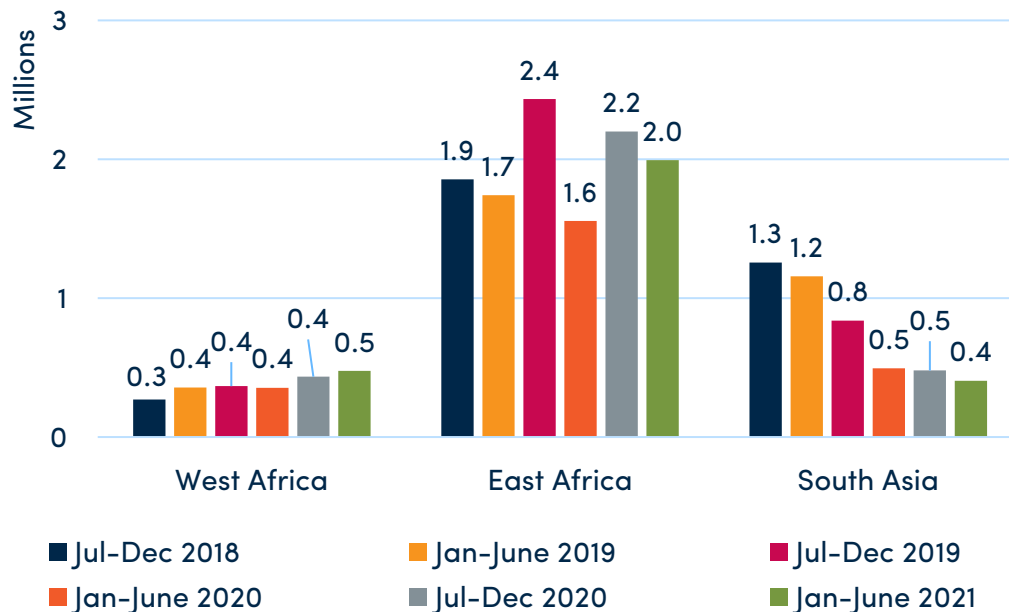


Solar Home  
System



Over the last 18 months, the three key regional markets for off-grid lighting products have experienced very different trends in which COVID-19 was not the only factor

- West Africa sales volumes grew 10% compared to the second half of 2020 and are now 34% higher than in the second half of 2019.
- Sales in East Africa have not returned to growth, but are higher in absolute volumes than in the first half of 2019.
- Sales in South Asia have been on a declining trend since 2018 as the product mix moves away from traditional off-grid products. COVID-19 has accelerated this trend.



# Key Insight #6



Portable  
Lanterns



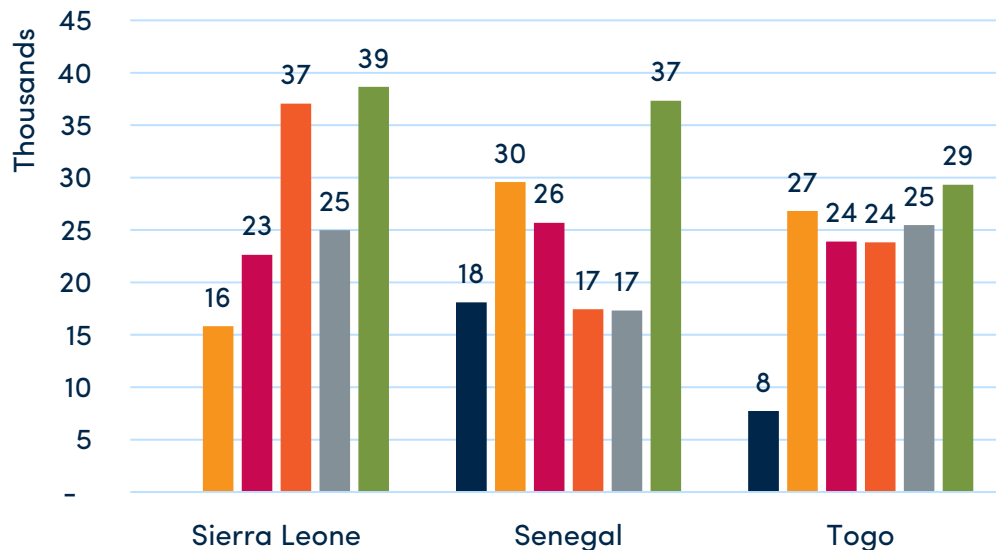
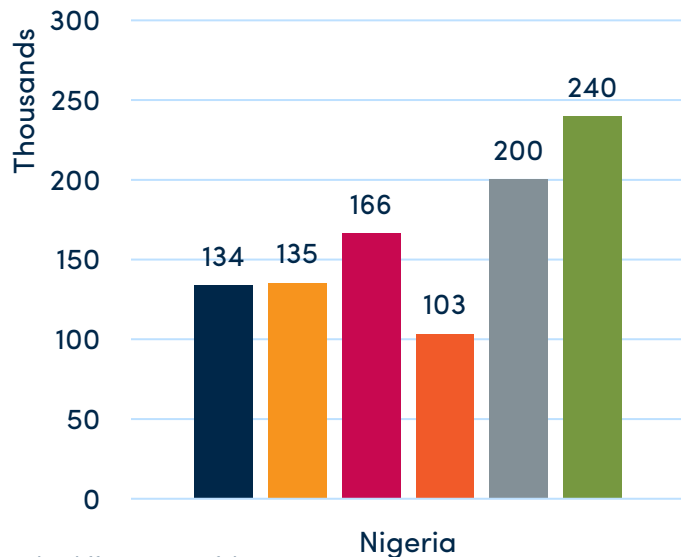
Multi-light  
systems



Solar Home  
System



Continued growth in West Africa has in large part been driven by Nigeria. However, other markets have also seen high sales volumes reported this round

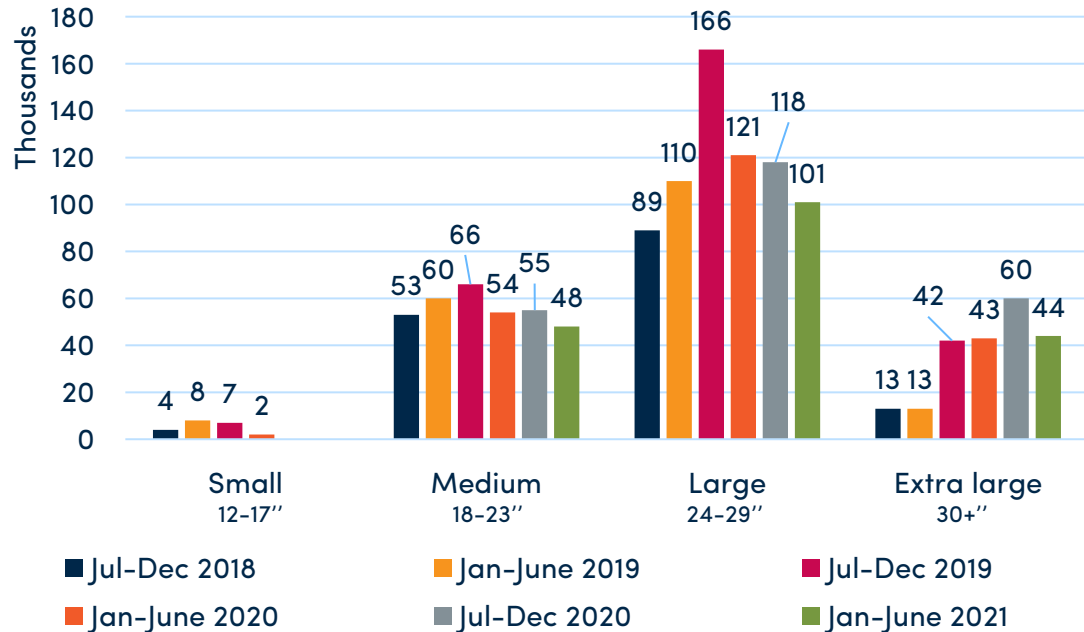


\*note the different axis of the two graphs

# Key Insight #7



Overall sales for TVs decreased significantly compared to the second half of 2020, and large TVs boast the lion's share of sales.



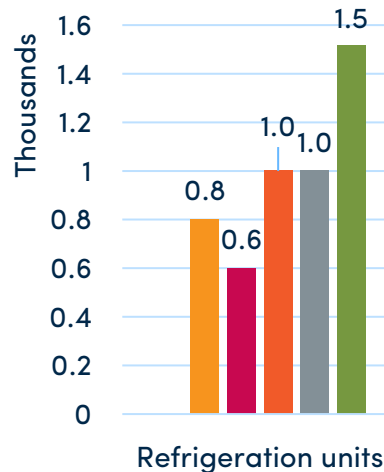
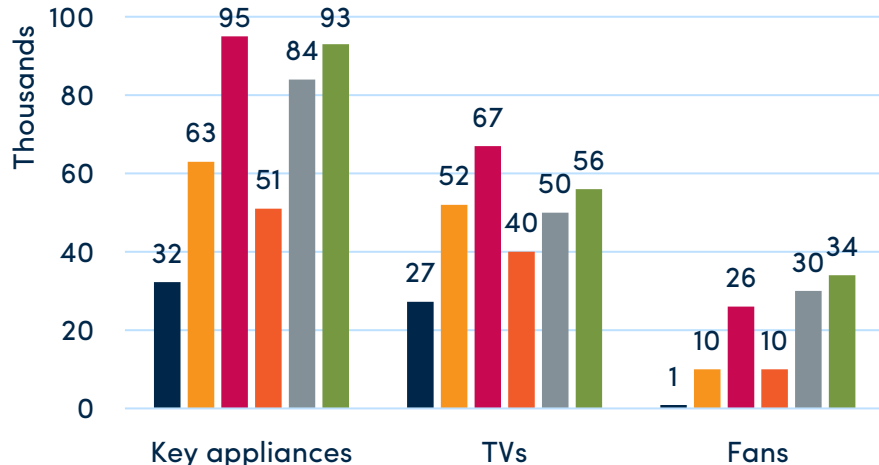
- The majority (approx. 52%) of TVs sold are in the Large category
- TV sales of all categories decreased. Large TVs saw the greatest actual decrease, with a reduction of 17,000 units (-17%) compared with the second half of 2020, but it was extra-large TVs which saw the greatest percentage decrease (-27%)
- 81% of TVs were sold bundled and 99% were reported as PAYGo sales. The larger the system, the more likely for the TV to be sold bundled with a power system

# Key Insight #8



## Key appliance sales in West Africa show signs of return to growth after sharp decreases in sales in the first half of 2020

- Fans and refrigerators recorded their highest sales volumes since data collection began with 34,000 and over 1,500 units sold respectively



- Nigeria is driving the growth of appliance sales – with a 38% sales volume increase compared to H2 2020
- Moderate growth for appliance sales was also seen in Sierra Leone, Senegal, Benin, Burkina Faso, and Mali

\*note the different axis of the two graphs



- Jul-Dec 2018
- Jan-June 2019
- Jul-Dec 2019
- Jan-June 2020
- Jul-Dec 2020
- Jan-June 2021

# 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](mailto:o.reynolds@gogla.org) with further feedback





# Thank you for attending! Want to learn more?



**Visit the report page:**  
<https://www.gogla.org/global-off-grid-solar-market-report>

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

Contact Oliver Reynolds  
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if interested in more data insights or  
in reporting your sales!