



Small but nice

1.8 MW installation on a store of a large Swedish global furniture supplier in Zwolle, The Netherlands

Photos (2): Ikaros Solar

If you were to make a list of factors contributing to the success of the companies Solarclarity, ESTG and Ikaros Solar, then lean, service-oriented structures, focusing on roof-mounted systems and maximising flexibility would no doubt top that list. EuPD Research recently awarded the two Dutch companies the title “Top PV Supplier 2016” in the wholesale category. The Belgian EPC company Ikaros benefits from its many years of experience with industrial roof-mounted systems.

The Netherlands in particular is regarded as an interesting photovoltaic market in Europe. In December, the country surpassed the 1.5-GW mark in cumulative installed PV capacity. This year, an additional installed capacity of approximately 600 MW is expected, primarily on residential and commercial rooftops. With more than 3 GW of PV, Belgium has systems with twice the power already installed, even though the expansion expected for this year will be rather low at approximately 150 MW. Despite the still comparatively minor importance of photovoltaics in the two countries, several companies are operating successfully on the market, mainly in the distribution and EPC fields, and have also opened up international markets.

Solarclarity: “Top PV supplier”

An example is distributor Solarclarity BV, based in Weesp in the province of North Holland. Solarclarity was recently recognised by EuPD Research as one of

five European companies with the award ‘Top PV Supplier in 2016’ in the category ‘Wholesale’. This is based on popularity among installers and the successful brand launch in terms of competitive differentiation and a broad product and service portfolio. Solarclarity’s CEO Peter Desmet declined to give precise details of turnover or sales, but with a market share of nearly 10 % in the Netherlands, it is the largest distribution company in the country. The company focuses on the installation of domestic roof-mounted and small commercial PV systems. The Dutch market currently dominates sales, with a proportion of 80 % of the business, but the company is on its way to more internationalisation, Desmet stresses. In addition to the branch in Belgium, a subsidiary in the Caribbean has been developing the business in that region over the last two years. It was launched in the Netherlands Antilles, “but we soon realised that there is significant interest in PV on neighbouring islands such as Jamaica and the Dominican Republic because of the high electricity

prices there”, Desmet said. Part of the business model there is to help the customer directly in solving logistical problems, while installers in Benelux are supplied and supported with various other services. Storage systems are offered in the Caribbean too, although these are adapted to local requirements. These are mostly lead-acid batteries for hybrid systems, which are often locally sourced.

According to Desmet, the company is currently in the process of developing a product and service range for storage, including digital connectivity, for the Netherlands and Belgium as well. Net metering, however, currently dominates the market and will continue to run until at least 2020, so self-consumption is still not very widespread, but the company is preparing for the future market well in advance. On-line training courses are also planned. Training courses are already included in Solarclarity’s range of services. Demand for training has declined during the past three or four years, but with the launch of the new technologies, Desmet expects it to increase once again. The head of Solarclarity also intends to expand the online offering for system configuration and performance forecasting. As a further step, they are also preparing a financing package together with their partner BuyRelly that installers will be able to offer their customers.

Desmet now has a promising new market in his sights: Ireland. “We have formed a joint venture with the local company BNRG Renewables to distribute PV in Ireland like Solarclarity does in the



Netherlands”, he reported. The name of this distribution activity is BNRG Distribution.

“I like entering markets that are considered to be difficult and are still rather empty of competitors”, Desmet described his strategy. “When I started the business in 2008 here in the Netherlands, many people shook their heads”, he said. The head of Solarclarity is also looking to expand into countries such as Sweden and parts of Africa, where experience from the Caribbean business could be useful. “Further internationalisation has a very high priority for us”, he stressed. The idea is to give customers, who are principally installers, a range of products and services that will help them to stand out on the market. For example, the company was the first distributor to introduce thin-film modules from

Warehouse of Solarclarity headquarters in Weesp, The Netherlands.

Photos (2): Solarclarity



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Solarclarity BV

Location: Weesp, The Netherlands
 Type: Distributor
 Founded: 2008
 Staff: 30
 Sales share in the Netherlands: 80 %
 Country offices: Netherlands, Belgium, Caribbean, Ireland
 Clients: installers
 Applications: residential and commercial rooftop installations
 Sales 2015: – (no indication)
 Total market share in Netherlands: almost 10 %
 USP: first mover for new products and markets mainly for rooftop installations, broad portfolio, additional services.
www.solarclarity.nl



Solarclarity's CEO Peter Desmet is aiming for further internationalisation.

Solarclarity is expanding from the Dutch market and modules manufactured by LG Electronics. The same applies to Fronius inverters which are now being strongly marketed in the Caribbean. Desmet now wants to expand this 'first mover' strategy.

ESTG: awarded wholesaler

ESTG, which has its headquarters in Elst in the Dutch province of Gelderland, also received an award from EuPD as a Top PV Supplier 2016 in the Wholesale category. In 2015, the online wholesale company's revenue was approximately € 23 million, according to Managing Director Klaas Galama, which is an increase of 85 % over the previous year. It also specialises in PV equipment for domestic and small commercial rooftop systems. The company delivers to installers. 80 % of the company's turnover was generated in the Netherlands last year, approximately 10 % in Belgium and the rest in other countries. But the company, which has a very lean structure with only twelve employees, is also currently expanding its successful online activities into other important PV markets.

ESTG

Headquarters: Elst, Netherlands
 Type: E-wholesaler
 Founded: 2010
 Staff: 12
 Country offices: Netherlands, Belgium, Germany, France, Italy
 Sales share home market: 80 %
 Clients: installers
 Applications: residential and small commercial rooftop installations
 Sales: € 23 million (2015)
 USP: fast delivery (24 hours), minimum order of quantity (1 piece), broad portfolio of quality brands, best price warranty
<https://en.estg-zonnepanelen.nl>



ESTG CEO Klaas Galama sees the flexibility of the lean company as a competitive advantage.

Photo: ESTG

Earlier this year, subsidiaries were established under the name ProPV GmbH in Germany, France and Italy together with a joint venture partner. The company is currently in the process of establishing locations and logistics centres in order to successfully position itself on the market.

This year, he is aiming to double the company's total turnover and to expand its international business through ProPV GmbH outside of Benelux to 25 % of total turnover. "Our expanded international business has been very successful so far", Galama said. In his view, one of the success factors is the Best Price Guarantee that the company can offer thanks to the online-based, efficient order processing as well as the volume effects in procurement. Procurement planning for this year includes 120 MW of inverter capacity and 30 MW of modules. Another important factor is the quick and easy online order placement around the clock. In Galama's view, the good availability of the products and the fast and reliable delivery within 24 hours round off the offer. This sets the company apart from its competitors. In foreign markets such as Germany and Italy, a wide range of products is available in the storage field, including Fronius, SolarEdge, ABB and Enphase. In Benelux, where storage is currently only a niche market, the company is planning to offer these products starting this year. "Net metering is an obsolete model. Self-consumption and storage will take over everywhere", Galama said confidently.

Ikaros Solar: specialist for roofs

Ikaros Solar, headquartered in Schoten near Antwerp, Belgium, specialises in commercial rooftop systems. According to Tom Pollyn, Head of International Business Development, the EPC group company achieved average annual sales of € 35 to 50 million during the last three years. The business is mainly international. Only approximately 20 % of turnover is currently generated in the Benelux countries. With 76 employees, the company has branches in Portugal, Mexico, India, Singapore and the United Kingdom, near Newport in South Wales. Since the establishment of Ikaros Solar in 2006, a total of about 180 MW has been installed, of which initially many installations were house rooftop systems in Belgium. Due to changing market conditions in Belgium, there has been an increasing focus on commercial roof-mounted installations since 2012 as well as strengthened internationalisation, Pollyn said. The company currently installs approximately 50 MW annually for B2B customers and investors. The main focus is on roof-mounted systems with capacities between 1 and 5 MW. Reference projects include several well-known names, such as a 1.2 MW system at the Brussels airport, a 2.3 MW system for ThyssenKrupp in Veghel / Zwijndrecht, a 1 MW sloping roof system for Sipani Fibres in Kolar, India, and a 17.2 MW ground-mounted system at Andover Airfield, UK. But the roof-mounted systems for a global Swedish furniture supplier are the most



Ikaros Solar

Location: Schoten, Belgium
Type: EPC (incl. operation & maintenance and distribution out of Belgium)
Founded: 2006
Staff: 76
Benelux sales share: 20 %
Country offices: Netherlands, United Kingdom, Portugal, Mexico, India, Singapore
Main clients: businesses, investors
Applications: commercial roof installations 200 kW – 20 MW
Total installed capacity: 180 MW
Turnover: € 35-50 million (yearly average 2013-2015)
USP: broad experience with industrial flat roofs, flexibility through international technical service centers
www.ikaros-solar.eu

significant. “We are installing rooftop systems on all of their stores in France and Portugal, a total of over 30”, Pollyn said. He is quite happy about the current order backlog. The focus here is on self-consumption, using the grid for storage.

The step into the French market was very important, Pollyn stresses. However, the company is now increasingly looking at new markets such as Argentina or Africa, where mine operators, for example, are regarded as an interesting customer group. “We rely primarily on close cooperation with companies and a market-based approach, rather than on

government-subsidised projects”, Pollyn explains. In addition to the company’s broad expertise in the area of industrial flat roofs, he also views the international service centres that Ikaros operates at its locations in foreign countries as success factors. “This make us flexible as well as reliable”, he emphasised. Despite the increasing internationalisation of the business, there are no plans to relocate the company’s headquarters away from Belgium. Another benefit for Ikaros is that in a country with three official languages, it is very easy to find multilingual employees.

Hans-Christoph Neidlein

Ikaros Solar will be present at the Intersolar in Munich again this year.

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