NEW ENERGY NEXUS Philippines

‘Who should I choose ?’

Philippines’ Rooftop Solar Installers Survey, Six Months On

BRIEFING PAPER
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Six months after our first survey, installers can get equipment again. Price wars, trust and upfront costs now decide whether a rooftop gets solar.

Executive Summary

New Energy Nexus Philippines supports solar installers, entrepreneurs and training partners across the country, including some of its first provincial installer associations. In April 2026, we surveyed 24 rooftop solar installers on how the oil and gas crisis was affecting their business. We found that weekly inquiries had quadrupled, while stockouts, price swings and a shortage of skilled workers kept installations far behind demand.

In late September 2026, we went back to the same network to see how the situation had changed.

Six months on, the main problem has moved from the warehouse to the point of sale. None of the installers we surveyed named equipment shortages as their main challenge, and one such installer, 10KGDC in Bohol, which had 22 confirmed projects stuck in April, cleared its backlog by July. Demand has cooled from April's peak in some areas and surged again in others, as in the Visayas, where rotational brownouts returned in August.

Customer behaviour has changed the most. Buyers now arrive informed, compare installers on brand, warranty and after-sales service, and shop for the lowest quote. Most installers convert a quarter or fewer of their inquiries, losing sales to cheaper competitors or to customers who cannot pay the full cost upfront. The skills gap has shifted with the market: 10KGDC, which struggled to find skilled installers in April, now finds salespeople with technical skills its hardest hire.

In terms of regulatory developments, the government has moved fast on permits and approvals. In April, the Department of Energy cut net metering approvals to 10 working days. In August, it barred utilities from requiring clearances, permits or fees for own-use systems that do not export power, and the President has asked Congress to pass the Sariling Kuryente Act.

Support for the rest of the market has moved more slowly. Most private-sector workers still have no public loan to spread the cost, and installers are adjusting to more demanding, price-conscious customers while the rules on equipment and installation are still being drafted. The decisions that will shape the next phase of the market, from public solar lending to equipment and installer standards, are being made now.

Context

Fighting in the Middle East effectively closed the Strait of Hormuz, and after the war began in late February, the President declared a national energy emergency in late March. The Philippines already had the costliest residential electricity in Southeast Asia, and prices have kept climbing. Meralco raised rates again in October, and an approved increase in its distribution charge has yet to reach bills. The peso is at a record low.

Households responded on their own. Ember estimates rooftop solar capacity nearly doubled in a year to about 1,300 megawatts by early 2026, around 1% of what the country's rooftops could support, and expects record panel imports to push installations higher.



Demand has moved past panic buying, and customers know more

In April, installers such as Metrogreen in Bulacan and Pampanga had gone from two inquiries a week to 80. It now receives eight to 10, still four to five times its pre-war level, and says hybrid systems remain in demand as households switch to electric vehicles. 10KGDC in Bohol saw demand surge again in August and September as rotational brownouts returned to the Visayas, and it switched off its advertising.

The bigger change is in who walks through the door. 10KGDC says customers ask far more pointed questions, credits artificial intelligence tools for this, and says most of its leads now have the budget. Woodrow Solar in Dipolog says customers ask about return on investment, batteries, warranties and whether the installer will still be around after installation.



"It's no longer about whether customers are getting solar. It's about who they should choose, and which brands."
— Zeus Joseph Garcia, Operations Manager, 10KGDC Commercial Inc., Bohol

"Customers understand solar better now. Explaining it isn't a struggle anymore."
— Rowell Paras, President, Sonnelink Green Builders and Trading Corporation, Pangasinan

Equipment is arriving, and the sale is now the bottleneck

In April, every installer named stockouts as their main challenge, and 10KGDC had 22 confirmed projects it could not install. It cleared that backlog by July, and by early September it was installing at full capacity, at least five homes a week. Long lead times still cost it some deals, and as a Manila supplier told Al Jazeera in October, panels can take 30 days to arrive.

The harder step now is turning inquiries into installations. Metrogreen converts 5 to 10% of its inquiries, a Metro Manila installer about 10%, and Woodrow 15 to 25%, while 10KGDC and Sonnelink report 40 to 70%. Sales fall through for two reasons: customers who choose the cheapest quote, and customers who cannot pay upfront.

What's holding the market back now

In April, installers described five constraints, with supply first and market quality last. The order has changed:

1 **Price competition and quality.** Three of five installers named cheaper competitors as their biggest challenge, and two said customers choosing on price overlook differences in workmanship and after-sales service. As Manilyn Pino of Woodrow Solar put it: "Dili na enough nga barato lang" / "Cheap alone is no longer enough. Serious clients want assurance that the system is reliable and that the company will still be there after installation."

2 **Ability to pay.** Two of five installers lose sales because customers cannot pay upfront, and Woodrow says some customers would buy with installments. Reuters reported that upfront costs usually exceed average annual household income. The Government Service Insurance System's solar loan saw 46% of its ₱12.5 billion pool drawn in 27 days, but only about 2 million government workers qualify, and some 40 million private-sector workers have no equivalent.

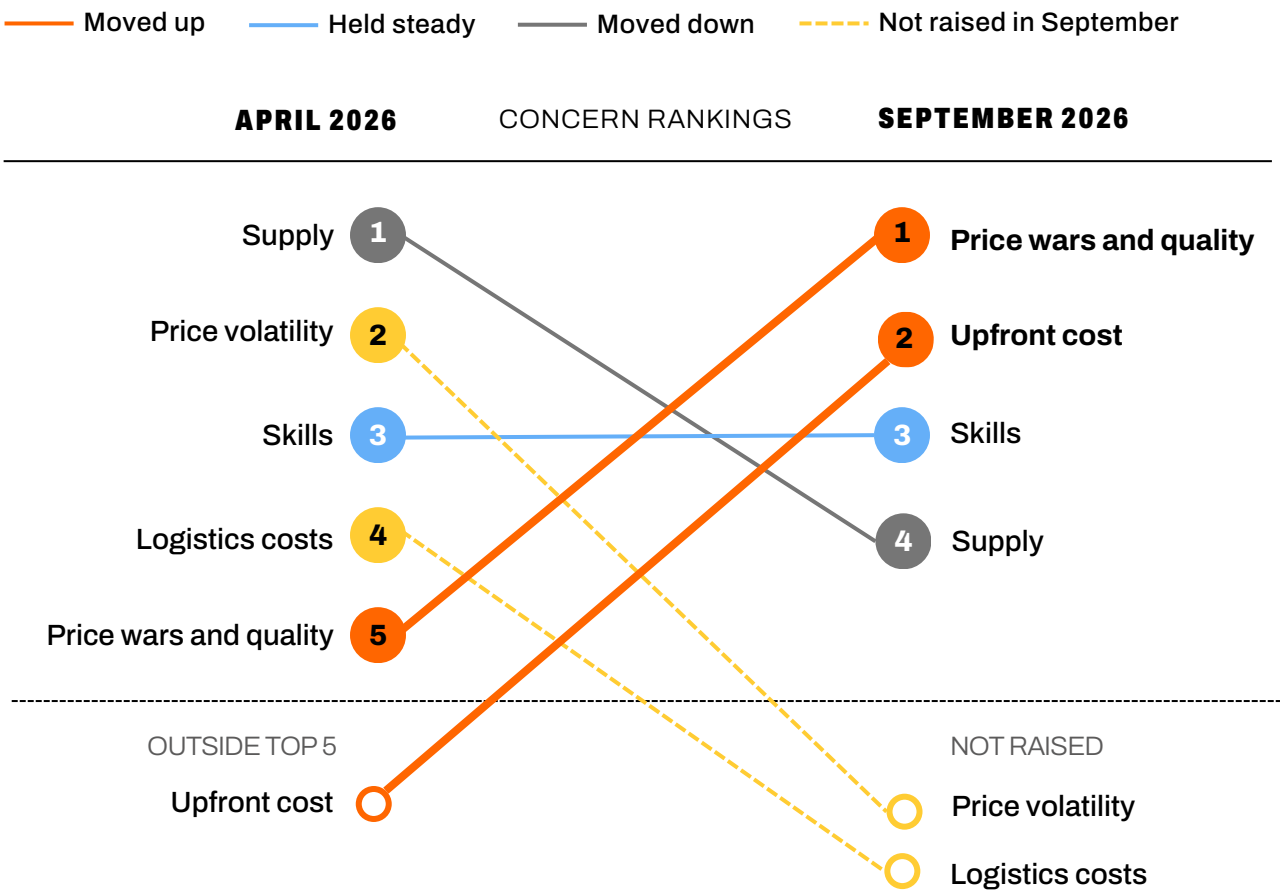
3 **Skills.** In April, 10KGDC told us: "Dahil sa biglang pagtaas ng demand, mahirap makahanap ng skilled workers." (Because of the sudden rise in demand, it's hard to find skilled workers.) In September, the same firm said: "It's hard to find good sellers who also have the technical skills." As buyers grow more demanding, small firms need sales, customer finance and after-sales skills alongside installation.

4 **Supply, eased but not solved.** Lead times still cost some deals. Price volatility and logistics costs did not come up in September. Diesel's common price in Metro Manila was about ₱94 a liter in early October, down from an average of ₱153.70 in mid-April.



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Price wars have replaced supply as installers' top constraint



WHAT HAS CHANGED | April › September rank

Price wars and quality | 5 › 1

Now the most common complaint. Installers lose deals to cheaper providers, and buyers choosing on price overlook workmanship and after-sales service.

Skills | 3 › 3

The gap has moved from the rooftop to the sales desk. 10KGDC, which struggled to find skilled installers in April, now finds salespeople with technical skills its hardest hire.

Price volatility | 2 › Not raised

Installers no longer mention prices shifting between quote and sale.

Upfront cost | Outside top 5 › 2

Installers lose sales when customers can't pay the full price at the outset, and some customers would buy with installments. Upfront costs usually exceed average annual household income.

Supply | 1 › 4

Installers can get equipment again, though long lead times still cost some deals.

Logistics costs | 4 › Not raised

Fuel has eased from its April peak. Diesel was about ₱94 a liter in Metro Manila in early October, down from an average of ₱153.70 in mid-April.

The rules are catching up with what households are buying

Three of five installers report customers moving toward hybrid systems or asking about batteries. Reliability is part of the draw: the Visayas grid recorded 93 yellow and 30 red alerts between January and early September.



"Net metering is not a priority, because most systems are hybrid now."
— Joel Remegio, President, Metrogreen Technologies Corporation

Government has moved on permits and approvals:

- In April, the Department of Energy cut net metering approvals to 10 working days.
- In August, it barred utilities from requiring clearances, permits or fees before customers install own-use systems that do not export power.
- The President has asked Congress to pass the Sariling Kuryente Act. The bill is still before the House, where the energy committee is consolidating versions and another was filed in September. It would direct the Department of Energy to widen access to financing, qualified installers and reliable equipment.

Rules on quality are less settled:

- In May, the Department of Trade and Industry proposed mandatory certification for panels, batteries, inverters, charge controllers and cables, excluding installation.
- Also in May, Meralco called for tighter rules on unregistered installations, which may make up a third of rooftop systems in its area, and asked for required qualifications for installers.
- The Department of Energy's installer registry serves government projects, and a 2024 draft set the bar at three completed projects in three years.

We found no accreditation for installers serving households. With fewer checks before installation, more of the safety burden falls on equipment and installers.

Who speaks for installers?

The Association of Solar Installers of the Philippines works to professionalize the industry and promote safe, cost-effective installations. It is led by working installers, two of whom responded to our survey. The Philippine Solar and Storage Energy Alliance brings together about 75 members, from developers and installers to utilities and financiers. Its Chair said in May that rooftop solar had been left behind while policy focused on power plants.

Yet the organizations named for the Department of Trade and Industry's first consultation were the Department of Energy, the Energy Regulatory Commission and Meralco. An Inquirer editorial in May warned that regulators could end up penalizing small players while protecting large ones. The rules on who installs, and with what, are being written now, and the people who will carry them out are thinly represented, especially outside of Metro Manila.

What this means and what needs to happen

Demand, equipment and a payback of about three years are now in place. Four decisions in motion will determine whether the next phase reaches households without savings and installers without scale.

Open finance to private-sector households.
The Social Security System plans ₱200,000 to ₱400,000 solar loans from a ₱40 billion pool, with guidelines due by year-end and rollout in the first half of 2027. Eligibility for lower-income and self-employed members, and a way to apply through an installer at the point of sale, would extend solar beyond households that already pay cash. Linking loans to certified equipment and qualified installers would set a quality floor, provided small firms can qualify.

Phase in equipment certification fairly.
Critics expect certification costs to reach buyers. A public list of certified products, and a phase-in that small buyers can meet, would protect the smaller installers who in April reported losing stock to larger distributors.

Build an accreditation route installers can climb.
Accreditation for installers serving homes should come through training and assessment. That gives freelancers and small firms a way up to standard and gives customers a way to tell installers apart. A threshold based on past project counts would shut out new entrants.

Bring installers into implementation.
Utilities must now report own-use installations to the Department of Energy every quarter. Publishing those reports would give the country the comprehensive rooftop count it currently lacks. Installers will be the first to see whether utilities apply the new rules as written, and they should help define "qualified installer" in the Sariling Kuryente Act.





Sheryl Estella, New Energy Skills Manager
New Energy Nexus Philippines:

"In April, installers told us they couldn’t get panels. By September, the ones we spoke to were more worried about price wars and customers who can’t pay upfront. Filipino households have shown they want solar; they now need a way to pay for it and a way to know their installer is qualified.”

“The government workers’ solar loan showed what happens when finance meets demand: almost half the money went in under a month. Forty million private-sector workers are waiting for the same chance.”

“The installers we spoke to want standards. What matters is whether a two-person firm in a provincial town can meet them, and installers should help write the rules they will be asked to carry out.”

Our Methodology

New Energy Nexus Philippines surveyed five installers in the week of September 21, 2026, drawn from the April network: Sonnelink and Metrogreen in Luzon, 10KGDC in the Visayas, Woodrow Solar in Mindanao, and one installer in Metro Manila. All five also took part in the April 2026 survey too.

These responses show direction and are not a representative sample, and conversion rates are each firm's own estimate. April figures are totals: across 20 firms, weekly inquiries rose from 114 to 456, and across 17, weekly installations rose from 29.5 to 68.6. The 582% and 170% figures published in April were averages of each firm's percentage change.



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