

North America Solar Photovoltaic Market Outlook to 2015 - Evolving US Solar PV Industry

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Abstracts

AM Mindpower Solutions announces the release of its new research report titled “North America Solar Photovoltaic Market Outlook to 2015 - Evolving US Solar PV Industry”. The report offers a comprehensive analysis of the Solar PV industry across the North America Region. It includes a detail analysis of the North America as a region with further analysis on solar PV market in countries the US and Canada.

The report covers information on various topics such as On-Grid and Off-Grid Cumulative and Annual Installed Capacity, PV power per capita, market segmentation, trends prevailing across the region and competitive landscape of the major players operating in the countries. The report entails the SWOT analysis of solar PV market in the two countries.

The future outlook presented the base case, conservative case and aggressive case scenario factor analysis providing an insight on the prospects in the solar PV cumulative and annual installed capacity for the two countries and region. The report also includes the cause and effect relationship among the various industry factors prevailing in the solar PV market.

The solar PV market is flourishing in the North America region because of the rising demand from consumers and financial support schemes from the government of various countries in the region. In 2010, annual installed capacity of 982 MW was installed in the region with majority falling in the on grid segment. However in 2009, only 539 MW of additional installation took place. The annual installed capacity almost doubled in 2010 as compared to in 2009. Utility sector was the segment which received the maximum number of installations rising nearly 4 times, while the residential and non residential segment witnessed 100% growth.

The annual PV installations increased at a CAGR of 60.2% from 2006-2010. Rising annual installations over the years symbolizes many things such as the nature of importance realized with the use of solar PV technology, rise in awareness regarding the harmful effects of carbon emission gases and search for an alternative source of energy. It is anticipated that the PV technology will be one of the many alternatives available for clean energy. The annual PV installations registered a strong increase in 2010 with the number of PV installations rising from 539 MW in 2009 to 982 MW in 2010. This boost was largely because of the increase registered in the off grid segment. The segment registered a growth of 168%, rising from 84 MW of installed capacity in 2009 to 226 MW of installed capacity in 2010.

During the period from 2006-2010, the cumulative installed capacity increased from 624 MW in 2006 to 2,528 MW in 2010, rising at a CAGR of 41.9%. This increasing demand for solar PV products placed the US as one of the significant markets after Germany and Spain. In reality, the US is one of the countries which can sustain the solar PV demand for long term in future.

However, since 2008 the demand for Single-Crystal Si has increased tremendously. The demand for Concentrator technology is rising gradually over the years. The shipment of PV cells and modules for Single-Crystal has increased from 86 KWp in 2006 to 581 KWp in 2009, becoming the largest Crystalline Silicon technology shipped in 2009. In 2009, the shipments of PV cell and module made up of cast and ribbon and thin-film technology were 404 KWp and 267 KWp respectively.

The base case scenario assumes normal business conditions where government tariff rate will be reduced in line of the cost of solar PV systems. The market will though propel as the economic stimulus and investment in new upcoming solar power farms will materialize. The cumulative installed capacity in this case is expected to be ~ MW in 2011 with the projections to grow 6 times to ~ MW by 2015.

KEY TOPICS COVERED IN THE REPORT

The feed-in-tariffs introduced in the various countries and their effect on the solar PV market

The annual and cumulative PV installations along with PV power per capita in various countries and region from 2006-2010

Future Outlook on the basis of assumed scenarios i.e. base case, worst case and aggressive case on cumulative installed capacity, annual installed capacity and PV power per capita, from 2011-2015

Cause and effect relationship analysis between various industry factors prevalent in the region

SWOT analysis of the solar PV industry and Macro Economic Environment in various countries.

Competitive Landscape of the various players operating in various countries across the globe.

Contents

1. NORTH AMERICA

1.1. North America Solar Photovoltaic (PV) Market Introduction

Solar Photovoltaic Technology

Benefits of Solar PV technology

Types of PV systems

Market Scenario

1.2. North America Solar PV Market Size, 2006-2010

1.2.1. North America Solar PV On-Grid and Off-Grid Cumulative Installed Capacity, 2006-2010

1.2.2. North America Solar PV On-Grid and Off-Grid Annual Installed Capacity, 2006-2010

1.3. North America Solar PV Power per Capita, 2006-2010

1.4. North America Solar PV Market Segmentation by Geography On the Basis of Cumulative Installed Capacity, 2010 and 2015

1.5. End Use Applications of Solar PV Energy

1.6. North America Solar PV Market Future Outlook

1.6.1. North America Solar PV Cumulative Installed Capacity, 2011-2015

1.6.2. North America Solar PV Annual Installed Capacity, 2011-2015

1.6.3. North America Solar PV Power Per Capita, 2011-2015

2. THE US

2.1. The US Solar Photovoltaic (PV) Market Introduction

2.2. The US Solar Feed-in Tariffs Present Status and Impact

2.3. The US Solar PV Market Size, 2006-2010

2.3.1. The US Solar PV On-Grid and Off-Grid Cumulative Installed Capacity, 2006-2010

2.3.2. The US Solar PV On-Grid and Off-Grid Annual Installed Capacity, 2006-2010

2.4. The US Solar PV Power per Capita, 2006-2010

2.5. The US Solar PV Cell and Module Shipments, 2006-2009

2.6. The US Solar PV Wafer, Cell and Module Production, 2007-2010

2.7. Number of Companies and Headcount in Solar PV Systems Manufacturing in the US, 2006-2009

2.8. The US Solar PV Market Segmentation

2.8.1. on the Basis Type of Installations, 2006-2010

2.8.2. On the Basis of Annual Installed Capacity By States, 2010

2.8.3. On the Basis of PV Cell and Module Shipments by Type of Technology, 2006-2009

2.9. The US Solar PV Market Competitive Landscape

2.10. The US Solar PV SWOT Analysis

Strengths

Weakenesses

Opportunities

Threats

2.11. The US Solar PV Market Future Outlook

2.11.1. The US Solar PV Cumulative Installed Capacity, 2011-2015

2.11.2. The US Solar PV Annual Installed Capacity, 2011-2015

2.11.3. The US Solar PV Power Per Capita, 2011-2015

2.12. The US Macro Economic Indicators: Current and Projections

2.12.1. Population, 2006-2015

2.12.2. GDP, 2006-2015

3. CANADA

3.1. Canada Solar Photovoltaic (PV) Market Introduction

3.2. Canada Solar Feed-in Tariffs Present Status and Impact

3.3. Canada Solar PV Market Size, 2006-2010

3.3.1. Canada Solar PV On-Grid and Off-Grid Cumulative Installed Capacity, 2006-2010

3.3.2. Canada Solar PV On-Grid and Off-Grid Annual Installed Capacity, 2006-2010

3.4. Canada Solar PV Power per Capita, 2006-2010

3.5. Weighted Average Standard Solar Module Price in Canada

3.6. Canada Solar PV Market Competitive Landscape

3.7. Canada Solar PV SWOT Analysis

Strengths

Weakenesses

Opportunities

Threats

3.8. Canada Solar PV Market Future Outlook

3.8.1. Canada Solar PV Cumulative Installed Capacity, 2011-2015

3.8.2. Canada Solar PV Annual Installed Capacity, 2011-2015

3.8.3. Canada Solar PV Power Per Capita, 2011-2015

3.9. Canada Macro Economic Indicators: Current and Projections

3.9.1. Population, 2006-2015

3.9.2. GDP, 2006-2015

4. APPENDIX

4.1. Market Definition

4.2. Abbreviations

4.3. Research Methodology

Data Collection Methods

Approach

4.4. Disclaimer

List Of Figures

LIST OF FIGURES

Figure 1: North America Solar PV Market Size in terms of Grid Connected and Off-Grid Cumulative Installed Capacity in Percentage, 2006-2010

Figure 2: North America Solar PV Market Size in terms of On-Grid and Off-Grid Annual Installed Capacity in Percentage, 2006-2010

Figure 3: North America Solar PV Power Installed Capacity per Capita in Watt/Inhabitant, 2006-2010

Figure 4: North America Solar PV Market Segmentation on the Basis of Cumulative Installed Capacity by Geography, in Percentage, 2010

Figure 5: North America Solar PV Market Segmentation on the Basis of Cumulative Installations by Geography in Percentage, 2015

Figure 6: North America Solar PV Market Size in terms of Cumulative Installed Capacity in Megawatt, 2011-2015

Figure 7: North America Solar PV Market Size in terms of Annual Installed Capacity in Megawatt, 2011-2015

Figure 8: North America Solar PV Power Installed Capacity per Capita in Watt/Inhabitant, 2011-2015

Figure 9: The US Solar PV Market Size in terms of Grid Connected and Off-Grid Cumulative Installed Capacity in Percentage, 2006-2010

Figure 10: The US Solar PV Market Size in terms of On-Grid and Off-Grid Annual Installed Capacity in Percentage, 2006-2010

Figure 11: The US Solar PV Power Installed Capacity per Capita in Watt/Inhabitant, 2006-2010

Figure 12: The US Solar PV Cell and Module Shipments, in Kilowatt peak (KWp), 2006-2009

Figure 13: The US Solar PV Wafer, Cell and Module Production, in Megawatt direct current peak (MW-dc), 2007-2010

Figure 14: Number of Companies and Headcount in the Solar PV Systems Manufacturing in the US, 2006-2009

Figure 15: The US Solar PV Market Segmentation on the Basis of type of Installations, in Percentage, 2006-2010

Figure 16: The US Solar PV Market Segmentation on the Basis of Annual Installed Capacity by Major States, in Percentage, 2010

Figure 17: The US Solar PV Market Segmentation on the Basis of PV Cell and Module Shipments by Type of Technology, in Percentage, 2006-2009

Figure 18: The US Solar PV Market Size in terms of Cumulative Installed Capacity in

Megawatt, 2011-2015

Figure 19: The US Solar PV Market Size in terms of Annual Installed Capacity in Megawatt, 2011-2015

Figure 20: The US Solar PV Power Installed Capacity per Capita in Watt/Inhabitant, 2011-2015

Figure 21: Canada Solar PV Market Size in terms of Grid Connected and Off-Grid Cumulative Installed Capacity in Percentage, 2006-2010

Figure 22: Canada Solar PV Market Size in terms of On-Grid and Off-Grid Annual Installed Capacity in Percentage, 2006-2010

Figure 23: Canada Solar PV Power Installed Capacity per Capita in Watt/Inhabitant, 2006-2010

Figure 24: Weighted Average Price of a Standard Solar Module in Canada in CAD/Watt, 2006-2009

Figure 25: Canada Solar PV Market Size in terms of Cumulative Installed Capacity in Megawatt, 2011-2015

Figure 26: Canada Solar PV Market Size in terms of Annual Installed Capacity in Megawatt, 2011-2015

Figure 27: Canada Solar PV Power Installed Capacity per Capita in Watt/Inhabitant, 2011-2015

List Of Tables

LIST OF TABLES

Table 1: North America Solar PV Market Size in terms of On-Grid and Off-Grid and Total Cumulative Installed Capacity in Megawatt (MW), 2006-2010

Table 2: North America Solar PV Market Size in terms of On-Grid and Off-Grid and Total Annual Installed Capacity in Megawatt (MW), 2006-2010

Table 3: North America Solar PV Market Segmentation on the Basis of Cumulative Installed Capacity by Geography in Megawatt, 2010

Table 4: North America Solar PV Market Segmentation on the Basis of Cumulative Installations by Geography in Megawatt, 2015

Table 5: Cause and Effect Relationship Analysis between Industry Factors and North America Solar PV Market Prospects

Table 6: North America Solar PV Market Size in terms of Cumulative Installed Capacity in Megawatt, 2011-2015

Table 7: North America Solar PV Market Size in terms of Annual Installed Capacity in Megawatt, 2011-2015

Table 8: The US Solar Photovoltaic Industry Feed-in Tariff Rates, in USD/kWh in 2010

Table 9: The US Solar PV Market Size in terms of On-Grid and Off-Grid and Total Cumulative Installed Capacity in Megawatt (MW), 2006-2010

Table 10: The US Solar PV Market Size in terms of On-Grid and Off-Grid and Total Annual Installed Capacity in Megawatt (MW), 2006-2010

Table 11: The US Solar PV Market Segmentation on the Basis of Type of Installations, in Megawatt (MW), 2006-2010

Table 12: The US Solar PV Market Segmentation on the Basis of Annual Installed Capacity by Major States, in Megawatt (MW), 2010

Table 13: The US Solar PV Market Segmentation on the Basis of PV Cell and Module Shipments by Type of Technology, in Megawatt (MW), 2006-2009

Table 14: Competitive Landscape of Major Solar Photovoltaic Cell/Module Producers in the US (First Solar, SunPower, Uni-Solar and Evergreen Solar)

Table 15: The US Solar PV Market Size in terms of Cumulative Installed Capacity in Megawatt, 2011-2015

Table 16: The US Solar PV Market Size in terms of Annual Installed Capacity in Megawatt, 2011-2015

Table 17: The US Population Trend in Million, 2006-2015

Table 18: The US Gross Domestic Product in USD Billion, 2006-2015

Table 19: Ontario Feed-in Tariff Rates for Solar Photovoltaic Industry, in CAD/kWh in 2010

Table 20: Canada Solar PV Market Size in terms of On-Grid and Off-Grid and Total Cumulative Installed Capacity in Megawatt (MW), 2006-2010

Table 21: Canada Solar PV Market Size in terms of On-Grid and Off-Grid and Total Annual Installed Capacity in Megawatt (MW), 2006-2010

Table 22: Competitive Landscape of Major Solar Photovoltaic Cell/Module Producers in Canada (Canadian Solar, Allessun and Solar Can GreenEnergy)

Table 23: Canada Solar PV Market Size in terms of Cumulative Installed Capacity in Megawatt, 2011-2015

Table 24: Canada Solar PV Market Size in terms of Annual Installed Capacity in Megawatt, 2011-2015

Table 25: Canada Population Trend in Million, 2006-2015

Table 26: Canada Gross Domestic Product in USD Billion, 2006-2015

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