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Spain Solar Photovoltaic Market Outlook to 2015

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Abstracts

The report titled “Spain Solar Photovoltaic Market Outlook to 2015” provides a comprehensive analysis on various topics such as On-Grid and Off-Grid Cumulative and Annual Installed Capacity, PV power per capita, market segmentation and competitive landscape of the major players operating in the country. The report also entails the SWOT analysis of solar PV market in Spain.

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 country.

Spain is one of the most advanced countries in the development of solar power technology. The country is ranked among the top countries in Europe which receives the highest hours of sunshine. Spain is the 5th largest manufacturer of solar power technology in Europe with the annual installations of 369 MW in 2010, increasing the capacity to 3.7 GW. The country exported over 80% of this output to Germany. The solar energy generated 6.9 TWh of electricity in Spain, covering 2.7% of the electricity demand in 2010.

Spain is regarded as the second largest solar power country in Europe with a total cumulative installed capacity of 3.5 GW. A major proportion i.e. nearly 2.7 GW of this installed capacity was added in 2008. This happened after the government announced a maximum ceiling of 500 MW of installations in the country in autumn 2008. Several investors rushed to install the maximum possible capacity prior to the above mentioned date. By 2010, the plan set the target to satisfy 30.3% of the electricity consumption and 12.1% of the final energy consumption from non-conventional sources. The carbon emission saved due to the plan was estimated to be around 27.3 million tons of CO_2 in 2010.

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Spain was the second largest country in Europe with respect to the number of installations in 2010 after Germany. The country had the highest installed capacity per inhabitant with 74.5 watt per inhabitant in 2009, although the capacity per capita registered a slight decline from 75.0 watt per inhabitant in 2008. The industry has now started to take off with the new government support schemes and people awareness for green electricity.

In terms of non-conventional sources, wind and hydraulics have the highest capacity of 19,144 MW and 16,089 MW respectively in 2009. They contributed 48.3% and 40.5% respectively to the total installed capacity of renewable energy in 2009. Solar photovoltaic is a third largest renewable sector in Spain with the market share of 8.6% and installed capacity of 3,415 MW in 2009. Spain is witnessing technological innovations in the solar PV industry with new efficient silicon materials available for solar modules.

Under the best case scenario, the Solar PV market is expected to show resilience to the government revision in the FiT accompanied with the strength to devise path-breaking silicon technology with high conversion efficiency. This will impel the installed capacity to cross the mark of ~ GW by 2013 and ~ GW by 2015.

Key Topics Covered in the Report:

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

The annual and cumulative PV installations along with PV power per capita in the country 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

SWOT analysis of the solar PV industry and Macro Economic Environment in the country

Competitive Landscape of the various players operating in the country

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