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The US Solar Photovoltaic Market Outlook to 2015

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Abstracts

The report titled “The US Solar Photovoltaic Market Outlook to 2015” provides a comprehensive analysis on various aspects 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 the US.

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.

In 2009, 435 MW of PV installations were carried out in the country. The PV installations registered a twofold growth in 2010 reaching 820 MW, although the US market share for the global PV demand has stood between 5% - 7% since 2005 onwards.

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.

In 2010, the PV components i.e. PV wafer, cell and module registered a surge in production with 624 MW, 1,058 MW, 1,205 MW respectively. This increased growth is primarily because of rise in the global demand, increase in the local demand and surge registered in the production capacity of plants (new plants were added or increase in the capacity of the existing plants).

The year 2010, registered a stupendous growth in the utility sector where the installations in the segment increased from 70 in 2009 to 242 in 2010. In the last five

years, the share of utility installations has increased from nearly 0% in 2006 to 27.6% in 2010.

The PV installations in the country registered a diversified look with 16 states installing 10 MW of PV as compared to only 4 states in 2007. A total of 5 states in the US registered PV installation of more than 50 MW in 2010. The year 2010, showcases a complete different picture with states like New Jersey, Nevada, Arizona, Colorado and others increasing their PV installations. The share of California has reduced to 30% of the total US PV market which depicts lower dependency on a single state for PV growth.

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 best case situation assumes a spur in the growth of installations especially in the utility scale projects as several utilities will sign power purchase agreements or will develop their own projects in order to fulfill their states mandates to propel the amount of renewable electricity bought and sold. The US solar PV market may beat Germany to become the largest solar market in the world by 2015 with the cumulative installed capacity of ~ MW 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

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the country

Competitive Landscape of the various players operating in the country

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