

Global and China Photovoltaic Inverter Industry Report, 2010-2011

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Abstracts

As the core component in the photovoltaic system, photovoltaic inverter has presented vigorous industry development and expanding market size in recent years. In 2010, the market size of global photovoltaic inverter industry registered EUR 4.923 billion, up 110.8% year-on-year.

In 2010, German manufacturers still dominated the photovoltaic inverter market in the world. SMA, the largest photovoltaic inverter manufacturer worldwide, accounted for over 39% of the global shipment. Meanwhile, shipments of North America and Asia revealed rising trend. Thanks to the rapid development of its photovoltaic inverter industry over the years, China has become one of the key manufacturing countries for photovoltaic inverter.

Domestic manufacturers in the Chinese market include Sungrow, KSTAR, ZOF, EHE and Surpass Sun, and foreign manufacturers consist of SMA, KACO and SATCON.

Among domestic manufacturers, Sungrow, the key photovoltaic inverter supplier for Golden Sun Project in China, enjoys the largest production scale, providing 60%-70% of the Project with photovoltaic inverters annually. KSTAR and RONGXIN started mass production in 2010. The capacity of KSTAR reached 2,180 sets per year, among which 2,000 sets were small power inverters and 180 sets were high power inverters.

Additionally, Northern Electric & Power, HESHUN ELECTRIC and KEHUA HENGSHENG are actively conducting R&D or pilot production of solar inverters.

As for foreign companies, SMA, Satcon, Kaco are among the enterprises that hold relatively large market shares. Compared with their counterparts in China, products of

foreign companies possess advantages in conversion efficiency and stability. However, for foreign manufacturers, the high production cost and inaccessible after-sale service caused by the mode of operation through agencies have led to their unsatisfactory development in the Chinese market.

Hence, foreign manufacturers have started the construction of production bases in China in recent years. For instance, AE and SGEN started cooperative production in Dec. 2009; Satcon initiated production and assembly of 500 KW PowerGate Plus solar PV inverters through GCL Solar in Oct. 2010.

Contents

1. OVERVIEW OF PHOTOVOLTAIC INVERTER

- 1.1 Introduction of PV Inverter
- 1.2 Classification of PV Inverter
- 1.3 Technological Development Of PV Inverter
 - 1.3.1 History of Technology Development
 - 1.3.2 Trend of Product Development
- 1.4 Industry Chain of Photovoltaic Inverter
 - 1.4.1 Raw Materials in the Upstream
 - 1.4.2 Photovoltaic Inverter Manufacturers in the Midstream
 - 1.4.3 Application Fields in the Downstream

2. STATUS QUO OF GLOBAL PHOTOVOLTAIC INVERTER MARKET

- 2.1 Status Quo
 - 2.1.1 Sales
 - 2.1.2 Shipment
 - 2.1.3 Price
- 2.2 Supply & Demand
 - 2.2.1 Supply
 - 2.2.2 Demand Forecast
- 2.3 Market Structure
 - 2.3.1 Manufacturer
 - 2.3.2 Consumer Countries and Characteristics
 - 2.3.3 Distribution of Application

3. STATUS QUO OF CHINA PHOTOVOLTAIC INVERTER INDUSTRY

- 3.1 Market Size
- 3.2 Demand Forecast
- 3.3 Development Characteristics
- 3.4 Key Enterprises

4. KEY FOREIGN ENTERPRISES

- 4.1 SMA
 - 4.1.1 Profile

- 4.1.2 Operation
- 4.1.3 Business in China
- 4.2 POWER-ONE
 - 4.2.1 Profile
 - 4.2.2 Operation
 - 4.2.3 Business in China
- 4.3 KACO
 - 4.3.1 Profile
 - 4.3.2 Business in China
- 4.4 FRONIUS
 - 4.4.1 Profile
 - 4.4.2 Business in China
- 4.5 SIEMENS
 - 4.5.1 Profile
 - 4.5.2 Business in China
- 4.6 SPUTNIK ENGINEERING
- 4.7 SATCON
 - 4.7.1 Profile
 - 4.7.2 Operation
 - 4.7.3 Business in China
- 4.8 AE
 - 4.8.1 Profile
 - 4.8.2 Operation
 - 4.8.3 Business in China

5. KEY DOMESTIC ENTERPRISES

- 5.1 RONGXIN
- 5.2 JIUZHOU ELECTRIC
- 5.3 KSTAR
- 5.4 KEHUA HENGSHENG
- 5.5 GUANGDIAN ELECTRIC
- 5.6 HESHUN ELECTRIC
- 5.7 SUNGROW
- 5.8 CLOU
- 5.9 CORONA
- 5.10 FIRST SECOND
- 5.11 Others
 - 5.11.1 ZHICHENG CHAMPION

- 5.11.2 ZOF
- 5.11.3 BOS
- 5.11.4 XIHE SOLAR
- 5.11.5 JINGHEN
- 5.11.6 NORTHERN ELECTRIC & POWER
- 5.11.7 JUNENG
- 5.11.8 EVER-SOLAR
- 5.11.9 EHE
- 5.11.10 SURPASS SUN

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