



Renewable Energy and Energy Efficiency Advisory Committee

Overview of International Solar Market

Matt Horowitz

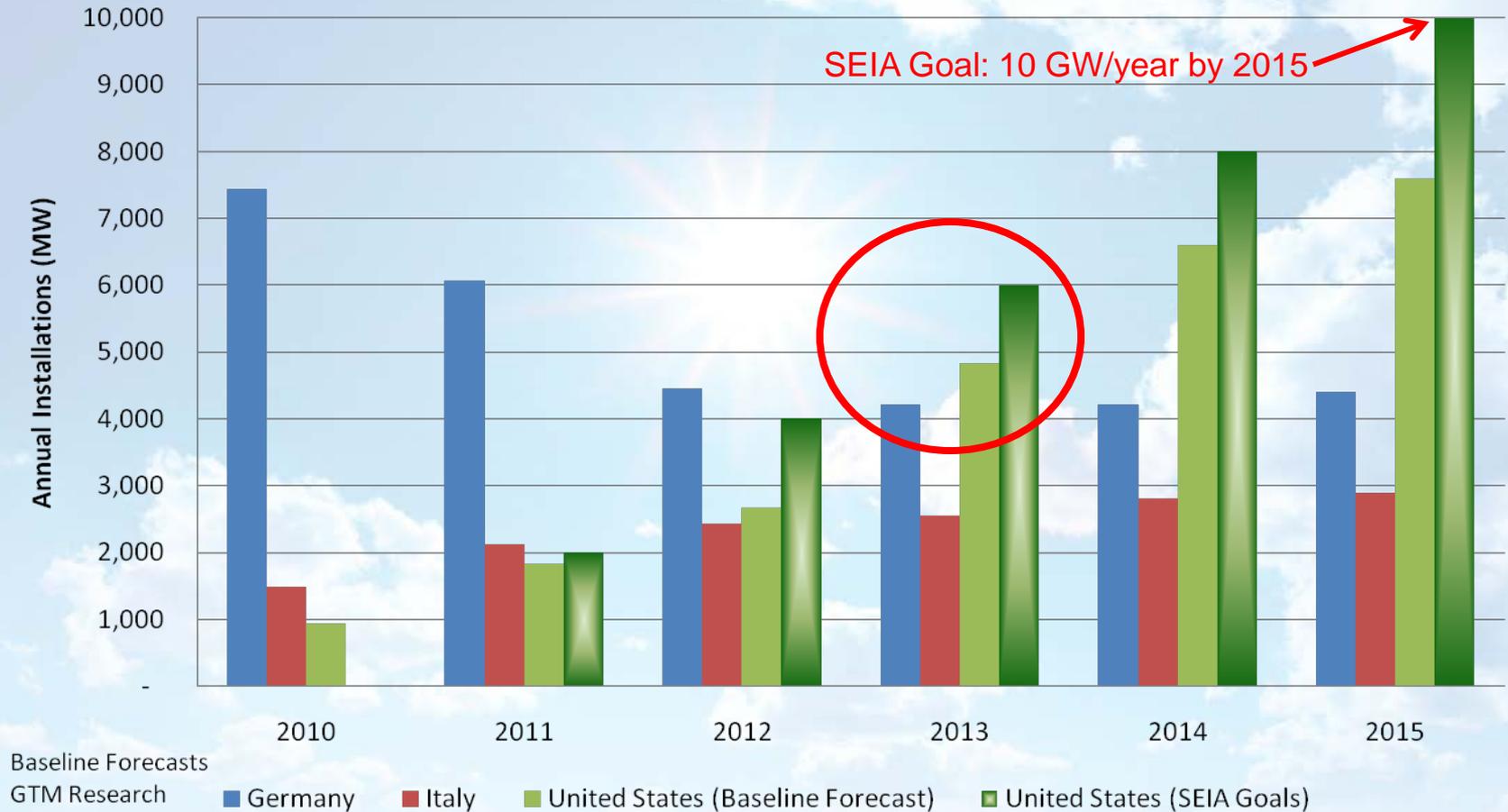
Manager of Government Affairs

About SEIA

- Founded in 1974
- U.S. National Trade Association for Solar Energy
 - 1,000 member companies
 - Across 50 United States
 - Largest solar companies in the world
- Our Mission: Build a strong solar industry to power America.
- Our members are from countries around the world
- Industry goal: 10 GW/year by 2015

The U.S. Will be the World's Largest Solar Market in 2 Years!

World's Largest Solar Markets



Solar Costs

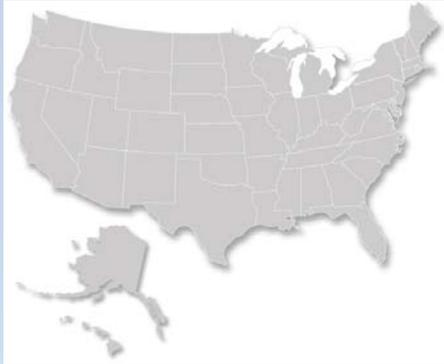
- A significant portion of the revenue generated by solar projects resides beyond the physical components –
 - Site preparation
 - Installation
 - Labor
 - Permitting
 - Financing
 - Other soft costs
- Together these comprise 50% of the total cost.

Solar Trade Assessment

- The U.S. is a net exporter of solar energy products (\$723 million in 2009).
- The largest solar energy product export is polysilicon (U.S. exported \$1.1 billion in 2009).
- In 2009 U.S. solar energy installations created \$3.6 billion in direct value, 74% (\$2.6 billion) accrued in the U.S.
 - 81% (\$2.1 billion) came from the PV sector
 - 16% (\$431 million) came from the SHC sector
 - 3% (\$76 million) came from the CSP sector

Solar Trade Assessment

ALL SOLAR PRODUCTS:
Net Exports \$723mm



PV Polysilicon: Imports \$84mm

PV: Polysilicon \$1,139mm

PV Modules: Imports \$1,242mm

PV Modules: Exports \$1,010mm



PV Cells: Imports \$119mm



PV Cells: Exports \$115mm

PV Wafers: Imports \$13mm



PV Wafers: Exports \$37mm

PV Inverters: Imports \$134mm



PV Inverters: Exports \$13mm

CSP: Imports \$4mm



CSP: Exports \$0mm

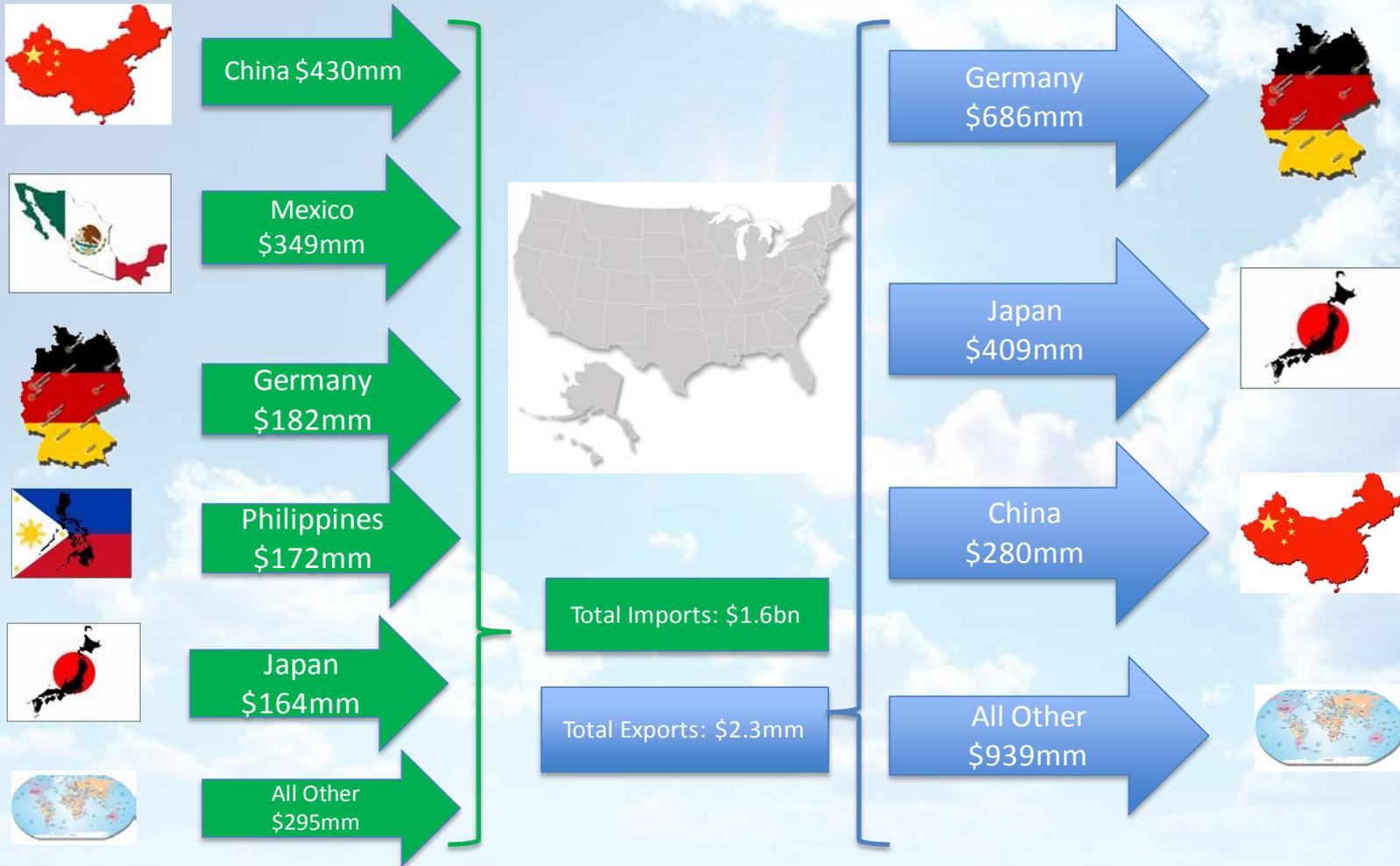
SWH & SPH: Imports \$11mm



SWH & SPH: Exports \$16mm

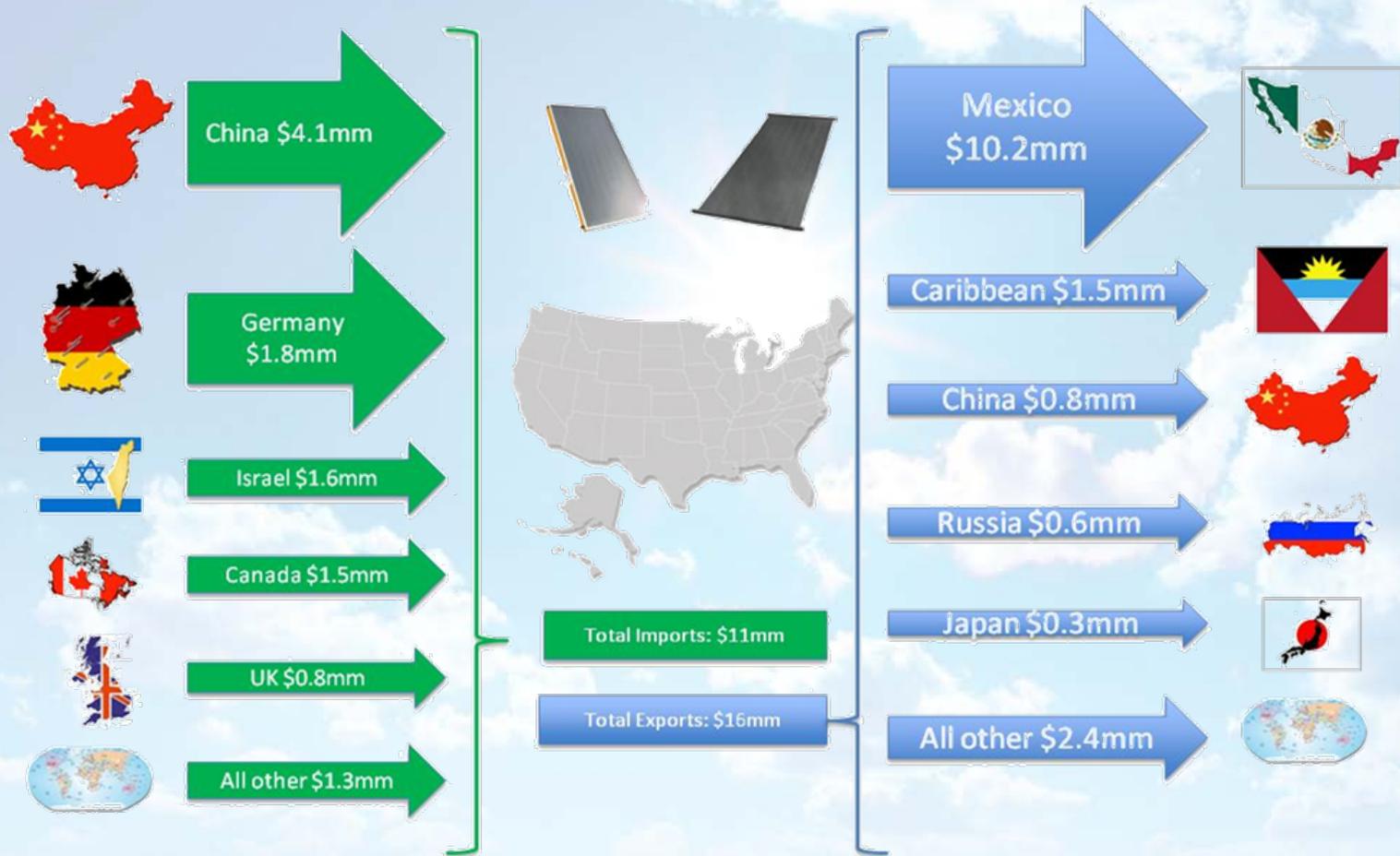
Trade Profile - Photovoltaics

- Net exports: \$723 million



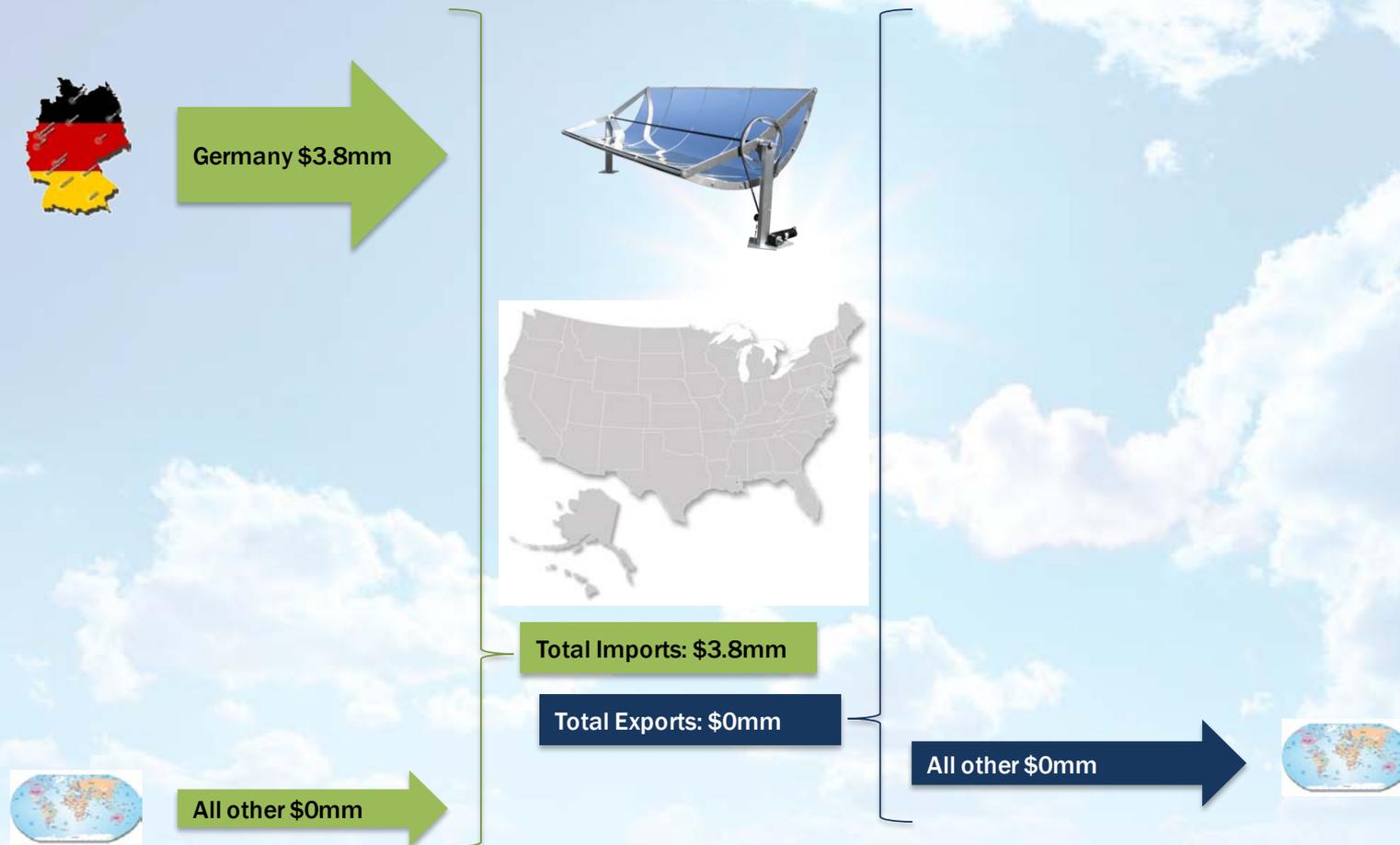
Trade Profile – SWH & SPH

- Net exports: \$5 million



Trade Profile – CSP

- Net imports: \$3.8 million



Barriers to Trade

- Tariff Barriers
- Non-Tariff Barriers
 - Local Content Requirements
 - Ontario
 - China
 - India
 - Washington State
 - Oregon
 - Delaware
 - Codes \ Standards \ Certification Requirements
 - Market Transparency
 - Shipping Costs
 - Complexity of government procurement
 - Education (policy makers, public officials, etc...)

Thank You

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SEIA Trade Balance Study:

www.seia.org/galleries/default-file/Solar_Trade_Assessment.pdf

SEIA Industry Data:

www.seia.org/cs/research/SolarInsight