

WINTERGREEN RESEARCH, INC.

**Solar Market Strategies, Shares, and Forecasts, Worldwide,  
2010 to 2016**

**Solar Systems Set to Grow Wildly**



*Picture by Susie Eustis*

**MOUNTAINS OF OPPORTUNITY**

***OPPORTUNITY ABOUNDS***

**WinterGreen Research, Inc.  
Lexington, Massachusetts  
[www.wintergreenresearch.com](http://www.wintergreenresearch.com)**

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**CHECK OUT THESE KEY TOPICS**

**Commercial Solar Panels  
Multicrystalline Module  
Solar Utility  
Residential Solar  
Consumer Solar  
Smart Grid  
Solar Panel Technologies  
Thin Film Solar Cells  
Amorphous Silicon  
Thin Film Solar Cells Cadmium Telluride  
Thin Film Solar Cells CIGS  
(Copper Indium Gallium Selenide)  
Copper-Indium-Gallium-Diselenide  
Conversion Efficiency Confirmation From NREL  
Thin-Film On Glass Substrate  
Solar CIGS On A Polymeric  
Plastic Substrate  
Solar Monolithic Integration On Glass  
Substrate  
Solar Modules Cadmium Telluride (CdTe)  
Semiconductor Material  
CIGS Photovoltaic Effect  
Crystalline Silicon Indirect Band-Gap Semiconductor  
Solar Thin Film Substrates  
Gettering in Large-Grained Thin Polycrystalline  
Silicon Films  
Glass Substrate**

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**Thin-Film Panels**

**Nanosolar**

**HelioVolt**

**MiaSole**

**First Solar**

**Photovoltaic Technologies**

**Solar Shading**

**Third-Generation Thin-Film Solar Applications**

**Flexible Glass Solar Panels**

**Polysilicon Producers**

**Solar Inverter**

**Solar Micro Inverter**

**Solar Panel Electricity Solutions**

**Solar Energy**

**Single Crystal Solar**

**Polycrystalline**

**Multicrystalline**

**Thin Film Panels**

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## Solar Market Strategies, Shares, and Forecasts, Worldwide, 2010-2016

LEXINGTON, Massachusetts (March 7, 2010) – WinterGreen Research announces that it has a new study on Solar Market Strategies, Shares, and Forecasts, Worldwide, 2010-2016. The 2010 study has 481 pages, 187 tables and figures.

Solar energy is anticipated to be built out on commercial roof tops with electricity fed to local substations. Electric utilities that own the distribution plant will distribute solar energy to homes from the substation. The electricity generated will be used for both stationary power and to charge electric vehicles. Solar energy market growth depends on volume production to achieve economies of scale.

Solar technology is of the crystalline and CIGS thin film variety. Both technologies are set to thrive in the near term. In the long term, the thin film technologies will probably be more efficient.

Solar energy market driving forces relate to the opportunity to harness a cheap, long lasting, powerful energy source. Solar energy can be used to create electricity in huge quantity. Solar panels are mounted in a weatherproof frame, are mounted in areas with direct exposure to the sun to generate electricity from sunlight.

Solar power systems are comprised of solar modules, related power electronics, and other components. Solar panels are used in residential, commercial and industrial applications. Solar compositions of arrays that comprise electric utility grids appear to be the wave of the future.

The demand for solar energy is dependent on a lower prices for solar and higher prices for petroleum. A combination of economies of scale being realized in the manufacturing along with increases in the current prices for petroleum will drive solar energy adoption.

The overall solar market has attained enough critical mass to boost competitive technologies of thin film and monocrystalline, polycrystalline, and multicrystalline silicon based systems.

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First Solar, the market leader, in commercial systems is participating in the solar markets at a level of \$1.9 billion of a total 2009 market of \$19.6 billion for 2009. First Solar is well positioned to gain significant market share over the next five years. First Solar basically does monolithic integration on glass, making things on the module level.

First Solar PV modules are thin film PV modules. The achievement of reaching 1GW of modules in installations bodes well for the entire industry, bringing credibility to the solar energy effort. To support the growing demand, First Solar continues to push the limits on volume manufacturing. First Solar is integrating each production step.

Sharp, the market leader, has achieved remarkable penetration of residential markets. Mass production of tandem-type thin-film solar cells means two types of cells are offered—crystalline types suitable for colder temperatures at high latitudes, and thin-film types better suited to warmer regions. Sharp is a unique manufacturer in that they offer both types.

Key market transitions are being made relative to smart grid, the increasing centrality of the local power substation, and implementation of the smart grid as a distribution center for electricity generated by solar power.

Solar energy is being adopted because the petroleum reserves are facing depletion. Solar offers plentiful, cheap energy source with panels that have a 25 year life and payback within 10 years. The payback is within 8 months if the solar electricity generated is used to charge an electric vehicle.

Thin film batteries and new utility level electricity storage are evolving. Thin film batteries are expected to power electric vehicles and sit on the ground outside homes and apartment buildings to store the electricity generated by solar. Thin film batteries provide the bridge to offer electricity when the sun is not shining.

Thin film batteries fuel growth in solar markets. These markets are set to evolve even faster than anyone has thought. Sharp, First Solar, Trina Solar, Suntech, and Ascent Solar Technologies are among the companies anticipated to benefit from the buildout of solar energy. These are the companies positioned to leverage solar energy market growth. These market participants continue to be very aggressive in both internal innovation commitments, as well as partnership and acquisition strategies.

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According to Susan Eustis, President of WinterGreen Research, "Worldwide solar markets are poised to achieve significant growth as solar energy is widely adopted, creating economies of scale and funding new technology efficiencies. Manufacturing efficiencies are expected to create new uses and permit users to leverage existing ones. Costs of solar panels are expected to decrease rapidly in response to the continuing economies of scale. Market strategies of the leaders Sharp First Solar, and Trina are compelling in their innovation and flexibility"

Emerging markets depend on 100 successful trials and reference accounts. Solar energy has now surpassed that magic number and is poised for rapid growth. The reference accounts are in place, the prices of the solar modules are decreasing at a faster pace than the industry had predicted, grid parity has been achieved in some places and is on track to be achieved everywhere.

Investment in solar energy is anticipated to continue. Participants will come and go, industry consolidation and high growth patterns will alternate until the nascent industry stabilizes, but solar energy is here to stay.

Solar energy is in place. It works, it is no longer a dream or a long shot, it is real. Read the study, look at the pictures of the large number of installations, this is an amazing market, emerging long after early efforts to bring these technologies to reality: Why is it here now? Solar energy is evolving because the price of gasoline is going to continue to climb.

Solar energy markets are big. At \$19.6 billion in 2009 solar panels are anticipated to reach \$125.5 billion by 2016. Market growth comes because the technology has caught the imagination of everyone, consumers, vendors, governments, politicians, oil producers, and the utility industry. The technology works, its benefits have a positive ROI over the useful life of the panels, even a significant payback. Solar provides the cheap, clean, dependable energy source needed to drive industrial growth, available.

Keywords: solar panel, solar electricity, solar market shares, solar market forecasts, solar technology, CIGS, Photovoltaic, Solar, thin film, crystalline, Substrate, Solar Modules Cadmium Telluride (CdTe) Semiconductor Material, Flexible Glass Solar Panels, Polysilicon Producers, Solar Inverter, Solar Micro Inverter, <http://wintergreenresearch.com/reports/solar.htm>

## **YOU MUST HAVE THIS STUDY**

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## Companies Profiled

### Market Leaders

Sharp  
First Solar  
SunTech  
Ascent Solar Technologies  
SolarWorld  
BP Solar  
Q Cells  
LDK Solar  
Yingli Green Energy  
Trina Solar  
Canadian Solar  
Solarfun-Power  
Sunpower  
Evergreen  
ET Solar  
China Sunergy  
Energy Conversion Devices / United Solar Ovonic  
Shenzhen Sunshine Electronics  
Kyocera  
Sanyo  
Mitsubishi

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**Solar Panel Market Participants**

**Solar Panel Company Profiles**

A-Power  
Abengoa Solar  
Anwell Technologies  
Areva / Ausra  
TATA BP Solar  
BYD 5-14  
China Sunergy  
China Guangdong Nuclear Wind Power Company  
Conergy AG -  
Conergy and MEMC Agreement  
Corning  
Developers Diversified Realty (DDR)  
Daqo New Energy  
Dow Chemical  
Dow Chemical / NuvoSun  
Dyesol  
Energy Conversion Devices / United Solar Ovonic  
ET Solar  
Evergreen Solar  
G24  
GreenWing  
HelioVolt  
Hoku Scientific  
Honda  
JinkoSolar  
Juwi  
Kyocera  
LDK Solar  
Masdar PV  
MEMC  
MEMC / SunEdison and Developers Diversified  
Realty National Rooftop Solar Program.  
MiaSolé  
Mitsubishi Solar Panels  
Oerlikon Solar

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PNM 5-106  
Ranking Solar  
Samsung  
Sanyo  
Scatec Solar  
Schott  
Sharp LCD  
Shell Oil  
Solar Energy Initiatives  
Shenzhen Sunshine Electronics  
Singulus Technologies  
SMA Solar Technology AG  
SMA Solar  
Solyndra  
Staples (SPLS)  
Solarfun  
Solar Fusion Power  
SolarWorld  
Sun Fields Europe  
SolFocus  
Stirling Solar  
Suniva Inc.  
SunTech  
SunPower  
SunPower Acquires SunRay  
Telio Solar / Telconord - Agencia de Energías Renovables  
Tianwei  
Xinjiang Goldwind**

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### Report Methodology

This is the 438th report in a series of primary market research reports that provide forecasts in solar energy, robots, communications, telecommunications, the Internet, computer, software, telephone equipment, health equipment, and batteries to store energy. Automated process and significant growth potential are a priorities in topic selection. The project leaders take direct responsibility for writing and preparing each report. They have significant experience preparing industry studies. Forecasts are based on primary research and proprietary data bases.

The primary research is conducted by talking to customers, distributors and companies. The survey data is not enough to make accurate assessment of market size, so WinterGreen Research looks at the value of shipments and the average price to achieve market assessments. Our track record in achieving accuracy is unsurpassed in the industry. We are known for being able to develop accurate market shares and projections. This is our specialty.

The analyst process is concentrated on getting good market numbers. This process involves looking at the markets from several different perspectives, including vendor shipments. The interview process is an essential aspect as well. We do have a lot of granular analysis of the different shipments by vendor in the study and addenda prepared after the study was published if that is appropriate.

Forecasts reflect analysis of the market trends in the segment and related segments. Unit and dollar shipments are analyzed through consideration of dollar volume of each market participant in the segment. Installed base analysis and unit analysis is based on interviews and an information search. Market share analysis includes conversations with key customers of products, industry segment leaders, marketing directors, distributors, leading market participants, opinion leaders, and companies seeking to develop measurable market share.

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Over 200 in depth interviews are conducted for each report with a broad range of key participants and industry leaders in the market segment. We establish accurate market forecasts based on economic and market conditions as a base. Use input/output ratios, flow charts, and other economic methods to quantify data. Use in-house analysts who meet stringent quality standards. Interviewing key industry participants, experts and end-users is a central part of the study. Our research includes access to large proprietary databases. Literature search includes analysis of trade publications, government reports, and corporate literature.

Findings and conclusions of this report are based on information gathered from industry sources, including manufacturers, distributors, partners, opinion leaders, and users. Interview data was combined with information gathered through an extensive review of internet and printed sources such as trade publications, trade associations, company literature, and online databases. The projections contained in this report are checked from top down and bottom up analysis to be sure there is congruence from that perspective.

The base year for analysis and projection is 2009. With 2009 and several years prior to that as a baseline, market projections were developed for 2010 through 2016. These projections are based on a combination of a consensus among the opinion leader contacts interviewed combined with understanding of the key market drivers and their impact from a historical and analytical perspective. The analytical methodologies used to generate the market estimates are based on penetration analyses, similar market analyses, and delta calculations to supplement independent and dependent variable analysis. All analyses are displaying selected descriptions of products and services.

This research includes referencde to an ROI model that is part of a series that provides IT systems financial planners access to information that supports analysis of all the numbers that impact management of a product launch or large and complex data center. The methodology used in the models relates to having a sophisticated analytical technique for understanding the impact of workload on processor consumption and cost.

WinterGreen Research has looked at the metrics and independent research to develop assumptions that reflect the actual anticipated usage and cost of systems. Comparative analyses reflect the input of these values into models.

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The variables and assumptions provided in the market research study and the ROI models are based on extensive experience in providing research to large enterprise organizations and data centers. The ROI models have lists of servers from different manufacturers, Systems z models from IBM, and labor costs by category around the world. This information has been developed from WinterGreen research proprietary data bases constructed as a result of preparing market research studies that address the software, energy, healthcare, telecommunications, and hardware businesses.

## Solar Market Strategies, Shares and Forecasts, Worldwide, 2010-2016

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## **ABOUT THE COMPANY**

**WINTERGREEN RESEARCH**, IS ABLE TO IDENTIFYING MARKET TRENDS THROUGH PRIMARY RESEARCH TECHNIQUES. THE EMPHASIS IS ON DEVELOPING ACCURATE NUMBERS THAT INCLUDE UNDERSTANDING DEVELOPMENTS, INTERVIEWING DISTRIBUTORS AND USERS, AND INTERVIEWING OPINION LEADERS. BY READING THE ELECTRONIC EQUIVALENT OF 40 FEET OF PAPER, WINTERGREEN RESEARCH SENIOR ANALYSTS CAN LEARN A LOT MORE ABOUT MARKETS, A LOT FASTER THAN CAN BE LEARNED THROUGH SURVEYS AND FOCUS GROUPS THAT ARE INHERENTLY LIMITED BECAUSE THEY ARE NOT ACCURATE. THINKING ABOUT MARKET TRENDS IS A HIGH PRIORITY AT WINTERGREEN RESEARCH. AS WITH ALL RESEARCH, THE VALUE PROPOSITION FOR COMPETITIVE ANALYSIS COMES FROM INTELLECTUAL INPUT AND FILTERING OF INFORMATION FOR THE PURPOSE OF ACHIEVING INTEGRATION INSIGHT.

THE ABILITY TO IDENTIFY MARKET TRENDS IS ENHANCED BY DOING IT OVER AND OVER FOR MANY DIFFERENT MARKETS. THAT IS WHAT WINTERGREEN RESEARCH IS ALL ABOUT: READING AND THINKING IS AN ESSENTIAL ASPECT OF COMPETITIVE ANALYSIS. IDENTIFYING AND TALKING TO OPINION LEADERS IS THE ESSENTIAL ASPECT OF PRODUCING GOOD, RELIABLE DATA.

**WINTERGREEN RESEARCH**, FOUNDED IN 1985, PROVIDES STRATEGIC MARKET ASSESSMENTS IN TELECOMMUNICATIONS, COMMUNICATIONS EQUIPMENT, HEALTH CARE, INTERNET AND ADVANCED COMPUTER TECHNOLOGY. INDUSTRY REPORTS FOCUS ON OPPORTUNITIES THAT EXPAND EXISTING MARKETS OR DEVELOP MAJOR NEW MARKETS. THE REPORTS ASSESS NEW PRODUCT AND SERVICE POSITIONING STRATEGIES, NEW AND EVOLVING TECHNOLOGIES, AND TECHNOLOGICAL IMPACT ON PRODUCTS, SERVICES, AND MARKETS. MARKET SHARES ARE PROVIDED. LEADING MARKET PARTICIPANTS ARE PROFILED, AND THEIR MARKETING STRATEGIES, ACQUISITIONS, AND STRATEGIC ALLIANCES ARE DISCUSSED. THE PRINCIPALS OF WINTERGREEN RESEARCH HAVE BEEN INVOLVED IN ANALYSIS AND FORECASTING OF INTERNATIONAL BUSINESS OPPORTUNITIES IN TELECOMMUNICATIONS AND ADVANCED COMPUTER TECHNOLOGY MARKETS FOR OVER 30 YEARS.

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